

4/6/2022

Economic Relief & Resiliency Plan and Regional Workforce Plan

SOUTH ALABAMA REGIONAL PLANNING
COMMISSION

Contents

- Introduction 3
- Project Overview..... 5
- First Impressions 6
- Stakeholder Engagement & Feedback..... 8
- Regional Stakeholder Survey 10
- Research & Analysis 14
 - Economic Overview »..... 14
 - Key Data Takeaways » 19
 - Industries in the Post-COVID World » 20
 - Clusters » 31
- Product Review & Optimization 35
 - Review of Select Sites »..... 35
 - Sites Summary »..... 44
- Workforce Review & Alignment..... 45
 - Labor Force Characteristics »..... 45
 - Education Programs to Occupations Crosswalk »..... 65
 - Sector Pathways » 91
- SWOT Analysis & Leverage Points..... 99
 - Leverage Points » 100
 - Key Findings from Engagement & Assessment » 101
- Regional Goals 102
- Strategies & Tactics 103
 - 1. Align Education & Workforce Initiatives 104
 - Increasing Talent Alignment & Access »..... 107
 - Participation » 109
 - Access »..... 115
 - Retention » 118
 - Training » 122
 - 2. Evaluate & Revise the Incentive Toolbox..... 126

Baldwin County » 127
Escambia County »..... 128
Mobile County » 129
3. Increase Coordination of Business Formation Efforts 131
 Baldwin County » 131
 Escambia County »..... 134
 Mobile County » 137
4. Build Regional Marketing & Communications Platforms 139
 Marketing & Communications Outcomes & Channels » 141
 Outreach Tools » 142
Appendix 153

Introduction

Over the last two decades, Alabama has enjoyed economic development growth as a result of business-friendly policies, extensive infrastructure investment, and renowned workforce training programs. That success has been extended in South Alabama, with its coastal and inland economies, strong logistical advantages, and a host of industrial sites. But without proper planning to mitigate disruptions—from the pandemic to weather-related challenges—that momentum could be impeded. **To continue the Region's current positive trajectory, resiliency and sustainability must be the focus moving forward.**

The South Alabama Regional Planning Commission (SARPC), which serves three Counties and the three primary economic development organizations of the Baldwin County Economic Development Alliance, the Escambia County Industrial Development Authority and the Mobile Chamber of Commerce as well as twenty-nine municipalities, understands the importance of collaboration for regional success. The organization's efforts go far beyond economic development, supporting everything from community development to transportation planning. While this breadth of services provides continual value to the Counties represented, it also means that capacity is at a premium. Nowhere is that more evident than in economic development.

Economic development among the three counties SARPC represents is diverse, and the different economies within each county offer unique challenges. The northern region of Baldwin County differs wildly from the southern region; the same applies to Mobile County and Escambia County. While the differences between and within the Counties are vast, the diversity among the municipalities is even greater. What moves the needle in a large metro area such as Mobile would have a different effect in Gulf Shores or Brewton.

The following document explores strategies and tactics for helping the Region move forward with the goals of maintaining resiliency and sustainability. From product to talent, from incentives to marketing, the individual resources of each county in the Region varies; but the importance each factor plays in their individual growth and development does not.

This document envisions a regional approach. Each strategy proposed, however, is considered with the understanding that both the inter-county and intra-county differences must be considered. Each of the approaches can be tailored to fit the needs of a specific county while also benefiting the Region as a whole.

Four overarching strategies form the focus moving forward:

- Align Education and Workforce Initiatives
- Evaluate and Revise the Incentive Toolbox
- Increase Coordination of Business Formation Efforts
- Build Regional Marketing and Outreach Platforms

These four strategies center around the ability to be resilient and responsive in the face of ever-changing market conditions both nationally and globally. Each strategy is data-driven, with a focus on being realistic and practical.

From talent to messaging, the strategies will support the Region moving forward—but only if they are embraced on a regional level. By working together, the Region will be able to ensure a resilient and sustainable approach to economic development.

We were honored to be a partner of the South Alabama Region in creating the strategic plan, and we look forward to the Region's continued success.

Sincerely,



Gray Swoope
President & CEO, VisionFirst Advisors

Project Overview

The South Alabama Region has been a hub of economic development and growth over the last decade. The Region has been fortunate to not only announce projects such as Airbus and ALDI, but also to take important steps to develop an entrepreneurial pipeline. The economic impacts of COVID-19, however, have shown us that previous efforts and industries might no longer look the same.

Economic recovery has been inhibited by supply chain disruptions, antiquated business models, and a skills mismatch in the labor market. As the nation continues to recover, reopen, and reconsider policies in light of the pandemic, the most important way for communities to be competitive is to build a sustainable workforce development infrastructure that is adaptive and responsive to local industry needs. Business regulations, tax structures, and talent solutions will need to be flexible to adapt to an ever-changing landscape that could include future pandemics and other disruptions.

Understanding the need for a forward-thinking approach, the South Alabama Regional Planning Commission, along with the economic development organizations (EDOs) of Baldwin, Escambia, and Mobile Counties, sought the development of the Economic Relief & Resiliency Plan and the Regional Workforce Plan to outline both regional and county-level strategies to continue to attract private sector capital while providing workforce and career pathways for residents.

To that end, VisionFirst Advisors undertook a holistic process that combined stakeholder feedback, comprehensive research and analysis, site visits, organizational assessments, and market trends and predictions. The project approach included:

- Gathering feedback through conversations with numerous community leaders, business leaders, and staff
- Conducting an online survey of residents
- Analyzing data trends and projections regarding the Region's growth, gaps, and opportunities as compared to the State and the nation
- Evaluating the Region's target industries and incentive structure
- Assessing the Region's product and assets, both tangible and intangible
- Reviewing the Region's workforce and strategic alignment with labor partners
- Conducting a marketing and communications audit and assessing asset development
- Developing a suite of goals and strategies for increased economic prosperity

Based on interviews, desktop analysis, and VisionFirst Advisors' knowledge of the Region and the organization, the following pages provide a strategic plan that identifies foundational activities, outlines goals, and gives suggested tactics to implement on a path to long-term success.

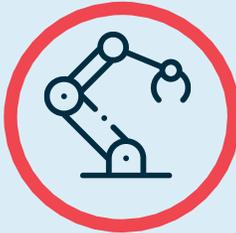
First Impressions

Communities and regions experience difficulties seeing their surroundings through the same eyes as clients, guests, prospective industries, and newcomers to the area. Below are first impressions as they might be perceived by a site selector comparing the SARPC Region to competitor communities.



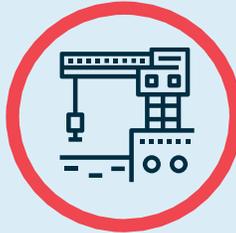
LOW REGIONAL COHESION

Each county is distinct and has its own advantages, but there is a lack of regional interconnectedness. There are opportunities for the Counties to cooperate and complement each other's efforts in job creation and private sector capital investment. The Counties would benefit from leveraging their workforce partners, legislative delegations, and business formation efforts to increase regional competitiveness.



ROBUST EXISTING INDUSTRIES

The Region has a thriving portfolio of existing industries, from Aerospace to Advanced Manufacturing and from Entrepreneurship to Electronics. While each county has its own set of target industries, there is some overlap. Strongly positioning the ability for a diverse range of companies, including foreign companies, to find success in the Region through increased marketing can strengthen the overall project pipeline.



STRONG INFRASTRUCTURE ASSETS

The three Counties are fortunate to possess strong infrastructure assets, including a major port, rail access, airports, and a Mega Site. Positioning these assets, along with available sites and associated due diligence, prominently and consistently on local, regional, and State websites can help drive project and prospect interest.

First Impressions: Baldwin County //

- Promotion of entrepreneurial mindset through incubators
- High quality of life and amenities sought out by regional residents
- Workforce pipeline is a challenge, especially in the County's service industries
- Mega Site is a significant asset for the Region
- Varying mindsets regarding economic growth
- Continuous population growth is an advantage
- Both coastal and noncoastal communities; needs vary based on geography
- Strong K-12 education system
- Strong leadership in EDO
- Creative in marketing and data analytics approaches

First Impressions: Escambia County //

- Limited population makes recruitment/retention difficult
- There are opportunities to develop and expand apprenticeship programs and partnerships with local industry.
- Flood plain issues
- Strong existing industry
- Poarch Band of Creek Tribe is a committed community partner
- Growing Main Street program to expand quality-of-life amenities and grow retail sector
- Broadband availability/access is an issue
- New State prison offers opportunities and challenges

First Impressions: Mobile County //

- The economic development organization (EDO) has a strong reputation and history of success
- Strong infrastructure assets, including the port and airports
- Perceptions of Alabama can be a challenge when recruiting foreign direct investment
- Post-COVID logistics dynamics and need for supply chain capacity could be advantageous
- Opportunity for improved collaboration around marketing efforts
- Workforce pipeline and "brain drain" a challenge
- Negative perceptions around the public school system
- Innovation Portal, an incubator aligned with the University of South Alabama
- Higher-education partners are a strength

Stakeholder Engagement & Feedback

In Your Words – VisionFirst hosted more than sixty stakeholder meetings with more than 100 elected officials, business leaders, small businesses, and community members.



Conversations with the professional staff members enabled VisionFirst to gain a better understanding of current operations, programs, products, and services. These conversations also helped identify challenges faced due to macroeconomic trends and local issues, especially as the nation and Alabama communities begin to reopen and recover from the pandemic.

Meetings with business and community stakeholders enabled VisionFirst to gain insights through the lens of each group's focus into how the Region can find long-term success. Every stakeholder meeting yielded productive dialogue about the Region's and each county's future, identifying both critical issues and attainable opportunities. During the conversations, VisionFirst sought answers to questions centered on such topics as:

- Considering the pandemic (COVID-19) and natural disasters such as Hurricane Sally, how has the Region's economic and workforce development focus changed?
- What has changed in that market, considering COVID-19, which might change the focus of how economic and community development activities are handled?
- How does the Region deal with the mitigation of natural disasters such as hurricanes when building new sites and buildings?
- How does economic development interact with the educational community to maximize the Region's workforce development improvement efforts?
- Is the Region nimble enough to handle the unprecedented amounts of uncertainty and changes in the economy?

Key findings from the meetings are presented in aggregate on the following pages. They have been grouped by the primary themes that resulted from the stakeholder conversations.

The comments listed are a sample of the meeting outcomes from local leaders and do not reflect VisionFirst's opinion.

LEVERAGE ENTREPRENEURIAL EFFORTS AS A REGIONAL ASSET

- There is growing success around regional business formation efforts with incubators and accelerators.
- Innovation Portal is set up to promote entrepreneurship and technology development.
- The area can build further collaboration among innovation and entrepreneurial partners.
- An incubator/accelerator branding component could be helpful to innovation efforts while also retaining young talent.

BUILD WORKFORCE RESILIENCY THROUGH COLLABORATIVE PARTNERSHIPS

- Service sector jobs might not be able to be filled in the short- and long-term.
- Employers and workforce providers expressed challenges in hiring both skilled and unskilled workers.
- Local apprenticeship programs do not necessarily send workers to local companies.
- Despite increasing wages, hiring challenges remain.
- There are challenges in closing the talent pipeline gap between colleges and employers.
- There is a need for an employers' roundtable to encourage dialogue among companies.
- The area needs more apprenticeship programs to ensure a strong talent pipeline.
- For skilled/professional workers, there is hesitancy to move to parts of the Region.

EXPAND SITE & BUILDING INVENTORY

- The area enjoys assets such as strong logistics infrastructure, available land for development and a coastal location.
- The Region is home to the fastest-growing container port in the country five years running.
- Each of the communities has several strong sites for competitive projects, but they need additional marketing materials and data to increase visibility.
- The State has a site and building inventory, but the communities would benefit from increased marketing for key sites.

INCREASE FOREIGN DIRECT INVESTMENT BY PROMOTING EXISTING INDUSTRY

- Investors have an outdated perception of Alabama, impacting foreign direct investment.
- Demystifying the south, particularly for those companies and individuals who are not from the southern region, is a challenge.
- With additional marketing, messaging, and foreign market outreach, the EDOs can publicize its location to foreign investors in the Manufacturing, Aerospace, and Aviation industries.

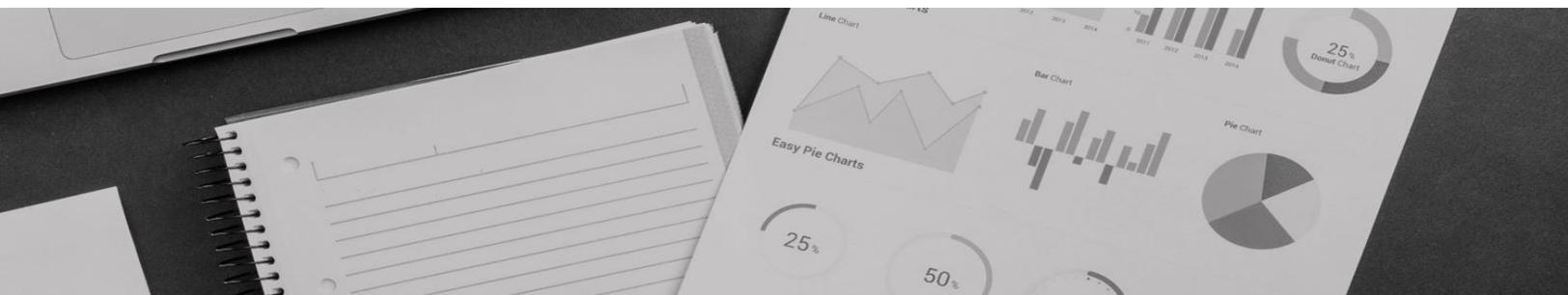
Regional Stakeholder Survey

VisionFirst Advisors, along with the three Counties, sought stakeholder input in the economic development process through an online survey. This survey was targeted at key stakeholders including business leaders, elected representatives, education providers, and other influential leaders and organizations in the community, rather than the public at large.

The survey, taken by more than 100 people, gave participants the opportunity to provide feedback on how they feel about the role of economic development in the Region and their county, what type of growth and industry they think is best suited for the area, and what they believe are the top economic development priorities for the future. The feedback from community and business leaders also helped in discerning the developments and trends that are occurring in the local economic climate. Takeaways from the survey include:

- Fifty-five percent of respondents believe the pandemic has impacted **workforce and education pipeline initiatives** more than other economic development activities.
- Nearly half of respondents (49.5 percent) would like to see their county have **vibrant downtowns and neighborhoods that appeal to young business leaders and families** as their five-year goal.
- When asked about how they view their county, more than 50 percent of respondents said they believe **local government and businesses cooperate** on community and economic development initiatives.
- Thirty percent of respondents say the Region's greatest strength is its **quality-of-life amenities**. Twenty-four percent say it is **affordability and the tax environment**.
- Thirty-four percent of those surveyed want to see new jobs in the **Advanced Manufacturing** sector, while 20 percent prefer to see growth in the **Warehousing, Logistics, and Distribution** sector. Nineteen percent showed a preference for job growth in the **IT, Data Center, and High-Tech** sector.

Detailed survey data is provided on the following pages.



Question 1: What economic development activity in your community has the pandemic affected most?

| | |
|---|--------|
| Workforce and education pipeline initiatives | 54.55% |
| Entrepreneurship and small business development | 18.18% |
| Business retention and expansion | 17.17% |
| Business attraction and marketing | 5.05% |
| Other (please specify) | 4.04% |
| Site development | 1.01% |

Question 2: From an economic development standpoint, where would you like to see your county in five years?

| | |
|---|--------|
| A community with vibrant downtowns and neighborhoods that appeal to young business leaders and families | 49.49% |
| Home to diverse industry | 15.15% |
| Increased per capita income | 15.15% |
| Increased population | 8.08% |
| Supportive of startups and entrepreneurs | 7.07% |
| Other (please specify) | 5.05% |

Question 3: What statement most resonates with how you see your county/regional economy?

| | |
|---|--------|
| Local government and businesses cooperate on community and economic development initiatives | 42.86% |
| Businesses are growing | 25.51% |
| Wages and salaries make it possible to maintain my standard of living | 10.20% |
| Education and job training are available to residents who want or need it | 15.31% |
| Entrepreneurs can start and succeed | 6.12% |

Question 4: When considering the South Alabama Region of Baldwin, Mobile, and Escambia Counties, what do you see as the Region's greatest strength?

| | |
|--|--------|
| Quality-of-life amenities | 30.30% |
| Affordability and the tax environment | 24.24% |
| Support for existing industry growth and expansion | 14.14% |
| Available sites/buildings for new industry or expansions | 11.11% |
| Connectivity – location, traffic, and roadways | 8.08% |
| Quality education (public and private) | 4.04% |
| Ease of doing business / regulatory environment | 6.06% |
| Workforce skills, cost, and availability | 1.01% |
| Other (please specify) | 1.01% |

Question 5: What type of new businesses and industry do you want to see in the Region?

| | |
|---|--------|
| Advanced manufacturing | 34.34% |
| Warehousing, logistics, and distribution | 20.20% |
| IT, data centers, and high-tech | 19.19% |
| Homegrown/entrepreneurial businesses | 13.13% |
| Tourism | 5.05% |
| Other (please specify) | 4.04% |
| Agribusiness | 2.02% |
| Retail and service providers | 1.01% |
| None, I prefer to keep the existing level of business and industry | 1.01% |
| Back-office operations (e.g., call centers, accounting, financial services) | 0.00% |

Question 6: Of the following, which is most important for your county to address?

| | |
|---|--------|
| Attraction of skilled and educated talent | 30.61% |
| Attraction of new companies and industry | 29.59% |
| Retention of graduates of local universities and colleges | 13.27% |
| Support and retention of existing businesses and industries | 11.22% |
| Fostering of an entrepreneurial ecosystem | 8.16% |
| Other (please specify) | 6.12% |
| Growing the tax base of the Region | 1.02% |

Question 7: What is the top skill needed in your county?

| | |
|---|--------|
| Soft skills (e.g., work ethic, professionalism, communication) | 39.80% |
| Middle skills (beyond high school but less than a four-year degree) | 39.80% |
| High skills (four-year degree or higher) | 15.31% |
| Digital skills | 5.10% |

Question 8: What should be the Region’s top priority for economic development?

| | |
|--|--------|
| Create a unified vision and strategy for regional growth | 16.33% |
| Diversify the economic base and create new, higher-paying jobs | 15.31% |
| Attract and retain young professionals and families | 15.31% |
| Improve infrastructure assets | 14.29% |
| Encourage the growth of existing businesses and industries | 13.27% |
| Increase job skills of the local labor force | 11.22% |
| Create a strong entrepreneurial climate | 6.12% |
| Other (please specify) | 5.10% |
| Identify and develop industrial sites for recruitment | 2.04% |
| Improve government cooperation on a regional level | 1.02% |

Question 9: The following are skills that have been identified as crucial to developing the competitive workforce South Alabama needs to grow a strong and diversified economy. Please rank them with 1 being the most critical skill and 4 the least critical skill.

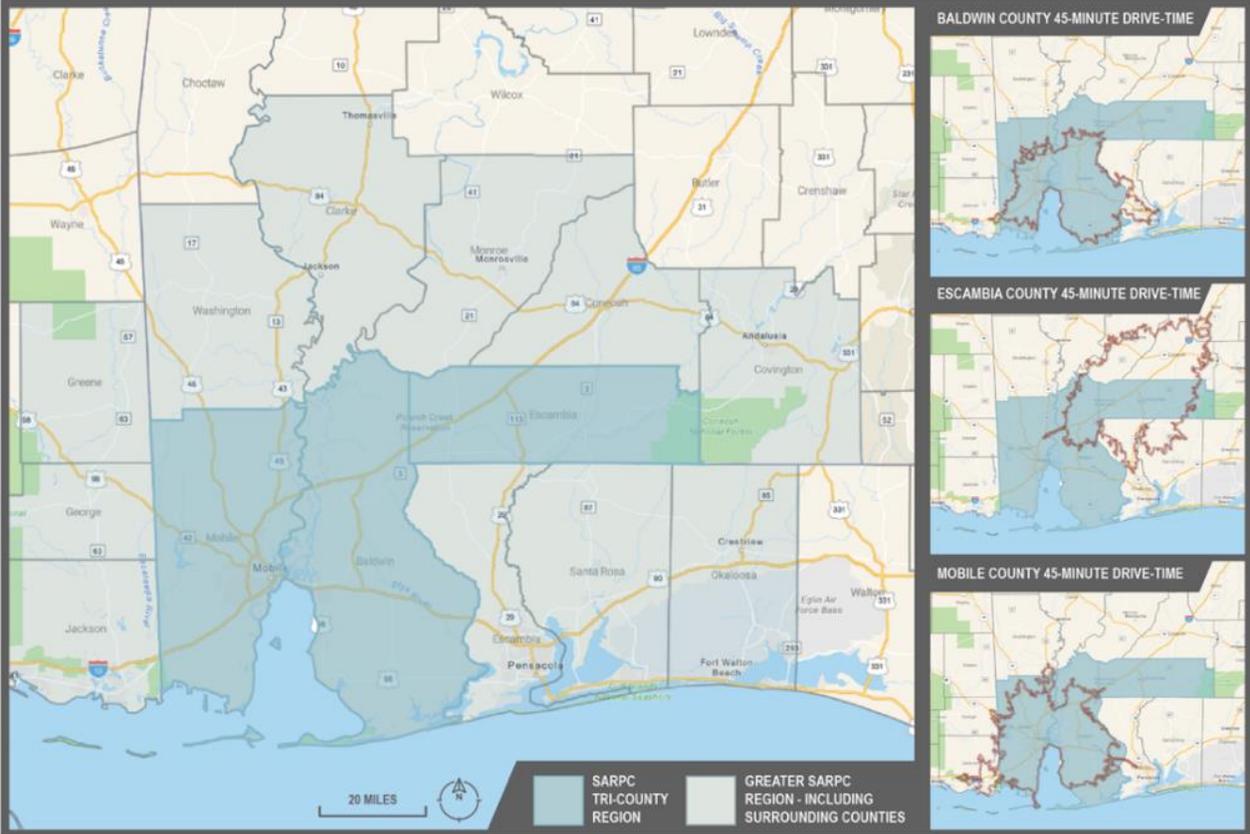
| | 1 | 2 | 3 | 4 | Score |
|----------------------|--------|--------|--------|--------|-------|
| Critical Thinking | 38.30% | 22.34% | 27.66% | 11.70% | 2.87 |
| Communication Skills | 20.00% | 42.11% | 28.42% | 9.47% | 2.73 |
| Technical Skills | 29.90% | 25.77% | 19.59% | 24.74% | 2.61 |
| Creativity | 13.40% | 10.31% | 23.71% | 52.58% | 1.85 |

Question 10: In addition to internships, cooperative experiences, and other partnerships between your business/industry and the State universities, do you believe you are appropriately connected to the State university talent pipeline?

| | |
|-----|--------|
| Yes | 54.08% |
| No | 45.92% |

Research & Analysis

Economic Overview »



To both improve messaging and distinguish the SARPC territory and each county in the Region from its competitors, it is important to understand the underlying data. Data can help bolster key messaging points, allowing internal and external stakeholders to understand the dynamic and compelling characteristics of the site and Region. Utilizing both qualitative and quantitative data can highlight the Region’s advantages while mitigating any perceived or real challenges.

In the data that follows, two geographic regions were identified to provide context and analysis in developing strategies for implementation. The first is the SARPC Region of Baldwin, Escambia and Mobile Counties. The second is the SARPC Regional Laborshed which is defined in the table below. The SARPC Regional Laborshed is those counties from which the SARPC Region draws commuting workers.

| SARPC Regional Laborshed | |
|----------------------------|----------------------------|
| Conecuh County, Alabama | Escambia County, Florida |
| Monroe County, Alabama | Washington County, Alabama |
| George County, Mississippi | Greene County, Mississippi |

| | |
|-----------------------------|--------------------------|
| Covington County, Alabama | Mobile County, Alabama |
| Escambia County, Alabama | Okaloosa County, Florida |
| Santa Rosa County, Florida | Clarke County, Alabama |
| Jackson County, Mississippi | Baldwin County, Alabama |

The following pages contain a host of tables and data that offers insights on workforce and industry sectors. The data, largely compiled from Chmura’s JobsEQ, is a compilation from federal sources and aggregated to allowing communities to make informed decisions based on what the data says.

However, the forecast data is just that, a forecast. Forecasting makes predictions based on past and present data. It does not account for the activities being undertaken by the economic development organizations and their partners to influence their economies, increase regional competitiveness and provide positive outcomes for their residents. When reviewing the data, it is important to note it is a snapshot, a purely number-driven representation of the Counties and the Region. It is not meant to suggest or imply how activities are working or not working.

TABLE OF FIGURES

This section of the plan contains a considerable amount of data and charts. A table of figures is provided below.

Figure 1: Economic Overview Comparison16

Figure 2: Baldwin County & 45-minute drive time surrounding baldwin county Top Industries by Employment.....24

Figure 3: Escambia County & 45-minute drive time surrounding Escambia county Top Industries by Employment.....26

Figure 4: Mobile County & 45-minute drive time surrounding Mobile county Top Industries by Employment.....28

Figure 5: Baldwin County Industry Clusters Annual Growth Forecast31

Figure 6: Baldwin County Forty-Five-Minute Drive Time Industry Clusters Annual Growth Forecast ..32

Figure 7: Escambia County Industry Clusters Annual Growth Forecast32

Figure 8: Escambia County Forty-Five-Minute Drive Time Industry Clusters Annual Growth Forecast33

Figure 9: Mobile County Industry Clusters Annual Growth Forecast33

Figure 10: Mobile County Forty-Five-Minute Drive Time Industry Clusters Annual Growth Forecast ..34

Unless otherwise noted, all data is from Chmura’s JobsEQ® 2021Q1.

Note: Based on the rural nature of Escambia County, addition 45-minute drive time data is presented from the more populated areas within the County – increasing the overall population (from approximately 238,000 to 330,000 and 265,000) and labor force (from approximately (102,000 to 140,000 and 112,000). This information can be found in the Appendix.

FIGURE 1: ECONOMIC OVERVIEW COMPARISON

| | BALDWIN COUNTY | BALDWIN 45-MIN. DRIVE TIME (ZIP Codes) | ESCAMBIA COUNTY | ESCAMBIA 45-MIN. DRIVE TIME (ZIP Codes) | MOBILE COUNTY | MOBILE 45-MIN. DRIVE TIME (ZIP Codes) | SARPC REGION | ALABAMA | U.S. | |
|---|--|--|-----------------|---|---------------|---------------------------------------|--------------|-----------|-------------|-------------|
| DEMOGRAPHICS | | | | | | | | | | |
| Current Population Estimate | 212,830 | 958,662 | 37,057 | 238,380 | 414,114 | 860,015 | 664,001 | 4,876,250 | 324,697,795 | |
| 2016 Population | 199,510 | 945,205 | 37,875 | 231,482 | 414,291 | 843,207 | 651,676 | 4,841,164 | 318,558,162 | |
| 2011 Population | 179,523 | 906,271 | 38,081 | 228,195 | 410,520 | 815,702 | 628,124 | 4,747,424 | 306,603,772 | |
| Annual Population Growth | 2.3% | – | -0.6% | – | 0.0% | – | 0.7% | 0.3% | 0.6% | |
| People per Square Mile | 140.1 | – | 38.8 | – | 336.1 | – | 178.8 | 96.8 | 92.9 | |
| Median Age | 43.0 | 39.2 | 40.0 | 41.1 | 37.9 | 39.3 | 39.7 | 39.0 | 38.1 | |
| LABOR FORCE | | | | | | | | | | |
| Civilian Population Age 16 years and over | Current Labor Force Size | 99,317 | 438,577 | 14,365 | 102,393 | 185,327 | 391,202 | 299,009 | 2,229,479 | 163,555,585 |
| | Labor Force Participation Rate | 57.7% | 57.2% | 48.2% | 54.0% | 56.7% | 57.4% | 56.6% | 57.3% | 63.2% |
| | 2016 Labor Force Size | 93,640 | 434,360 | 14,130 | 97,989 | 188,091 | 385,227 | 295,861 | 2,226,504 | 159,807,099 |
| | 2016 Labor Force Participation Rate | 58.5% | 57.7% | 46.5% | 53.6% | 57.8% | 57.9% | 57.4% | 57.8% | 63.3% |
| | 2011 Labor Force Size | 86,594 | 431,647 | 14,828 | 101,900 | 193,016 | 386,615 | 294,827 | 2,243,462 | 155,320,515 |
| | 2011 Labor Force Participation Rate | 60.8% | 60.5% | 49.1% | 56.3% | 60.7% | 60.9% | 60.0% | 60.1% | 64.7% |
| Civilian Population | Current Prime-Age Labor Force Participation Rate | 80.6% | 77.3% | 63.6% | 74.2% | 76.1% | 77.8% | 76.8% | 77.1% | 82.1% |
| | 2016 Prime-Age Labor Force Participation Rate | 79.8% | 76.9% | 62.3% | 72.8% | 76.1% | 79.1% | 76.4% | 76.6% | 81.5% |

| | BALDWIN COUNTY | BALDWIN 45-MIN. DRIVE TIME (ZIP Codes) | ESCAMBIA COUNTY | ESCAMBIA 45-MIN. DRIVE TIME (ZIP Codes) | MOBILE COUNTY | MOBILE 45-MIN. DRIVE TIME (ZIP Codes) | SARPC REGION | ALABAMA | U.S. |
|--|----------------|--|-----------------|---|---------------|---------------------------------------|--------------|-----------|-------------|
| 2011 Prime-Age Labor Force Participation Rate | 81.2% | 79.0% | 64.7% | 75.4% | 78.6% | 77.3% | 78.5% | 78.2% | 82.0% |
| Unemployment Rate March 2021 (Seasonally Adjusted) | 2.8% | – | 4.1% | – | 4.9% | – | 4.2% | 3.4% | 6.1% |
| Unemployment Rate March 2020 (Seasonally Adjusted) | 6.0% | – | 5.7% | – | 7.1% | – | 6.7% | 5.8% | 7.8% |
| Veterans (Age 18–64) | 9,337 | 43,538 | 1,005 | 11,826 | 770 | 2,087 | 25,515 | 177,164 | 9,143,042 |
| Total Employment (2021 Q1) – All Industries | 81,140 | 391,568 | 13,281 | 70,653 | 176,849 | 333,957 | 271,269 | 2,065,178 | 148,015,702 |
| Total Employment Change (2020 Q1) – All Industries | -2.1% | -3.4% | -4.9% | -3.2% | -4.1% | -3.2% | -3.5% | -2.8% | -5.1% |
| Total Employment Forecast (2026 Q1) – All Industries | 87,754 | – | 13,077 | – | 174,545 | – | 275,627 | 2,077,249 | 151,094,187 |
| Mean Commute Time (Min.) | 26.9 | 24.7 | 22.2 | 26.6 | 25.0 | 25.4 | 25.5 | 24.9 | 26.9 |
| EDUCATIONAL ATTAINMENT (AGE 25–64) | | | | | | | | | |
| Pupil/Teacher Ratio | 17.9 | – | 16.3 | – | 18.3 | – | 18.1 | 17.7 | 15.9 |
| Spending per Pupil | \$9,284 | – | \$10,371 | – | \$9,460 | – | \$9,453 | \$9,717 | \$12,654 |
| Student Enrollment | 32,823 | – | 5,339 | – | 60,598 | – | 98,760 | 744,235 | 50,710,441 |
| Age 25–64 with High School Diploma or Higher | 90.1% | 89.0% | 81.3% | 89.0% | 87.5% | 88.9% | 88.3% | 87.6% | 89.1% |
| Age 25–64 with Associate Degree or Higher | 42.9% | 36.5% | 21.2% | 32.0% | 33.0% | 35.4% | 35.4% | 36.0% | 42.6% |
| No High School Diploma | 8.9% | 11.0% | 18.7% | 11.0% | 12.5% | 11.1% | 11.7% | 12.4% | 10.9% |

| | BALDWIN COUNTY | BALDWIN 45-MIN. DRIVE TIME (ZIP Codes) | ESCAMBIA COUNTY | ESCAMBIA 45-MIN. DRIVE TIME (ZIP Codes) | MOBILE COUNTY | MOBILE 45-MIN. DRIVE TIME (ZIP Codes) | SARPC REGION | ALABAMA | U.S. |
|---|----------------|--|-----------------|---|---------------|---------------------------------------|--------------|-----------|-------------|
| High School Graduate | 27.1% | 30.0% | 42.0% | 35.3% | 32.7% | 30.8% | 31.5% | 29.5% | 25.7% |
| Some College, No Degree | 21.1% | 22.6% | 18.2% | 21.8% | 21.9% | 22.7% | 21.4% | 22.1% | 20.7% |
| Associate Degree | 10.4% | 10.6% | 8.9% | 12.0% | 9.0% | 10.4% | 9.4% | 9.4% | 9.1% |
| Bachelor's Degree | 22.0% | 17.5% | 8.5% | 14.0% | 16.3% | 16.8% | 17.6% | 17.1% | 21.2% |
| Postgraduate Degree | 10.5% | 8.4% | 3.8% | 6.0% | 7.7% | 8.2% | 8.4% | 9.5% | 12.3% |
| SOCIAL | | | | | | | | | |
| Total Housing Units | 114,164 | 439,218 | 16,586 | 105,154 | 183,671 | 375,784 | 314,421 | 2,255,026 | 137,428,986 |
| 2016 Total Housing Units | 107,579 | 428,960 | 16,529 | 100,745 | 181,612 | 366,293 | 305,612 | 2,209,335 | 134,054,899 |
| 2011 Total Housing Units | 102,978 | 417,116 | 16,421 | 99,340 | 177,126 | 354,509 | 296,633 | 2,146,513 | 131,034,946 |
| Average Annual Wage | \$41,989 | \$48,392 | \$42,409 | \$43,624 | \$51,076 | \$50,163 | \$47,933 | \$51,508 | \$63,393 |
| Cost of Living Index | 98.5 | 93.1 | 87.7 | 93.3 | 89.3 | 91.9 | 92.5 | 89.3 | 100.0 |
| Poverty Level (% of All People) | 10.4% | 15.5% | 22.2% | 14.8% | 18.8% | 15.6% | 16.2% | 16.7% | 13.4% |
| Households Receiving Food Stamps / SNAP | 7.7% | 13.7% | 15.7% | 12.6% | 16.6% | 13.3% | 13.7% | 14.0% | 11.7% |
| Disconnected Youth | 2.5% | 2.7% | 5.5% | 3.7% | 3.0% | 3.0% | 3.0% | 2.7% | 2.5% |
| Children in Single-Family Homes (% of All Children) | 27.5% | 41.1% | 43.5% | 35.7% | 46.5% | 39.2% | 40.5% | 38.6% | 34.1% |
| UNION MEMBERSHIP | | | | | | | | | |
| Union Membership (Private) | 2.2% | 4.4% | 4.8% | 4.4% | 5.4% | 4.4% | 4.4% | 5.6% | 6.2% |
| Union Membership (Manufacturing) | 2.3% | 6.0% | 7.7% | 6.0% | 6.1% | 6.5% | 5.6% | 7.7% | 8.4% |

Key Data Takeaways »

Population and Density //

- Baldwin County and Mobile County comprise the Region's concentration of residents and industry.
- While Escambia County is more rural and shows a slight decline in population over the past ten years, the performance of Baldwin County and Mobile County, taken in conjunction with a regional perspective, indicates healthy historic growth.
- The SARPC Region's population growth rate (0.7 percent) is outpacing the national growth rate (0.6 percent). This is due to Baldwin County's 2.3 percent growth rate, which is nearly four times that of the nation.
- Baldwin County and Mobile County have some of the highest densities of population per square mile in the State, indicating a high concentration of workforce.

Labor Force //

- Regional workforce participation rates (including prime-age participation rates) are near the State and national averages, and Baldwin County's prime-age labor force participation rate is above the State and national averages. The goal should be to meet or exceed State and national rates. EDOs should work with education workforce officials to re-engage the portions of the population that are not actively seeking employment, especially given the Great Resignation surrounding COVID and unemployment.
- Educational attainment levels for high school diplomas are lower in Escambia County, but a regional perspective raises the percentage to approximately that of the nation. The educational attainment level for bachelor's degrees or higher, however, is lagging from a regional perspective.
- While total employment declined over the past year (likely influenced by COVID) the Region fared better than the nation.

Industries in the Post-COVID World »

COVID, what began as a health and humanitarian crisis, quickly escalated to a supply chain and logistics crisis. From there, the economy shifted again, focusing on cybersecurity as a result of actions and activities now taking place remotely. With states and jurisdictions addressing the virus and lockdowns differently and the world reopening in fits and starts because of variant spreads, industries changed dramatically. Every industry was impacted. How well the industry adjusted during the pandemic and how it evolves because of what was experienced will shape how they survive in a post-COVID world.

The success of industry today, is largely dependent on its workforce; and a significant trend during the height of the pandemic related shutdowns was **remote work**. While many of the industries in the Region do not have large remote staffing outside of information technology, how employers respond to employee demand for increased flexibility will impact the quality and quantity of the talent available.

Employee expectations have changed. Before the pandemic, people followed technology. Today, technology follows people — to where, and when, they want to work. Hybrid working means different things to different people. It does not have to mean working in the office and at home equally, but it does mean offering the flexibility to all employees to choose for themselves.

Research suggests that as the standard evolves from remote enabled to work from anywhere, companies will need to be more flexible to deliver on employee expectations around connectivity, talent mobility and well-being. If businesses do not rethink decades old policies, employees may simply leave and take their expertise elsewhere. Prioritizing mobility also helps organizations find diverse, previously untapped talent with expanded accessibility and accommodations.

In looking specifically as to how the SARPC Region can support and recruit industries and talent moving forward, it is critical to maintain and support those that are already in the Region and understand the changes taking place within them. Existing industries are the backbone of local economies, and the South Alabama Region is fortunate to have the logistical assets, workforce, available properties and business climate to build greater resiliency in the industries moving forward.

In considering resiliency and sustainability, the following industries were examined for trends and opportunities in subsector growth.

Manufacturing Trends: According to the Harvard Business Review, “...manufacturers worldwide are going to be under greater political and competitive pressures to increase their domestic production, grow employment in their home countries, reduce or even eliminate their dependence on sources that are perceived as risky, and rethink their use of lean manufacturing strategies that involve minimizing the amount of inventory held in their global supply chains.” Understanding the desire for many companies to source in North America, the Region must look at its business climate practices such as sites and permitting that would allow a company to quickly find a site and believe that construction could happen on time and on budget. But the second component to be a successful location for onshoring will be workforce. The Region should highlight and grow outreach in the many Career & Technical Education (CTE) programs that already exist for both skilled and unskilled positions. In addition, the Region should expand and utilize apprenticeship programs that allow participants to be placed with employers quickly, but those programs should also provide financial aid and scholarships. The data below highlights the growth within the Region – outpacing the nation in employment, wages and subsectors over the past 10 years.

| Manufacturing Industry Spotlight (10 Year Historic) | | | | |
|---|------------|-------|-----------------------------|---|
| | Employment | Wages | Ship Building and Repairing | Iron and Steel Mills and Ferroalloy Manufacturing |
| SARPC Region | +0.7% | +8.6% | +1.7% | +5.2% |
| National | +0.5% | +8.2% | +1.2% | -1.3% |

- **Growing Subsectors for Regional Recruitment Efforts:** Medical Manufacturing (PPE), Medical Device Manufacturing, BioPharma, Robotics Manufacturing (specifically for those used in distribution facilities), 3D Printing/Additive Manufacturing

Aerospace Trends: According to Deloitte, “In 2022, the aerospace and defense (A&D) industry is expected to focus on innovation to develop new technologies and solutions, create new markets, and expand growth opportunities. Rapid evolution and commercialization of new technologies and processes can improve efficiencies and reduce costs...But current macroeconomic trends suggest that demand for small- and medium-sized aircraft will continue to recover to reach pre-COVID levels in 2022, with aircraft manufacturers focused on narrow-body aircraft being well positioned to benefit from this buoyant demand... Defense markets are expected to remain stable as military projects continue to be a strategic priority and countries further strengthen their militaries. There are more reasons to be optimistic. Private sector innovation will likely continue to increase the potential value that space, as an economic resource, can create for industries and organizations.”

The Region has experienced unprecedented growth over the past 10 years, outpacing the nation in aerospace employment, wage gains and new industry. With a forecast of aerospace growth for the Region, including the [recent announcement](#) between Airbus and

Lockheed Martin to build the U.S. Air Force’s next round of tankers – representing millions in investment and hundreds of new jobs – the Region must adequately prepare the emerging workforce. [FlightPath9](#) is a prime example and best practice, a pre-employment training program for high school seniors and residents early in their careers who want to explore careers in the aviation industry. The data below highlights the growth within the Region – outpacing the nation in employment, wages and subsectors over the past 10 years.

| Aviation, Space and Aerospace Industry Spotlight (10 Year Historic) | | | | |
|---|------------|-------|--------------|--|
| | Employment | Wages | Aircraft Mfg | Other Aircraft Parts & Auxiliary Equip Mfg |
| SARPC Region | +1.1% | +3.9% | +28.9% | +2.3% |
| National | +0.2% | +2.2% | -0.7% | -0.2% |

- **Growing Subsectors for Regional Recruitment Efforts:** Aircraft Manufacturing (Commercial and Defense), Aerospace Product and Parts Manufacturing (Tier 1 and Subtier Manufacturing), Machinery Manufacturing, IT and Cybersecurity, Maintenance and Repair Operations, Aircraft and Engine OEMs.

Distribution Trends: Stories of supply chain disruption dominated throughout COVID and well into the 2021 holiday shopping season. Numerous reports, articles and CEOs themselves noted that companies can no longer rely on a small number of massive fulfillment centers to meet customer demand; instead, businesses will increasingly rely on data and supply chain analytics to better understand how they can serve their customers from several smaller, localized fulfillment centers. Projects expect businesses to respond with a much more agile supply chain approach in 2022.

According to Inc., “The Covid-19 pandemic presents both problems and opportunities for robotics companies in the logistics and supermarket industries. Unexpected strains on supply systems and product shortages have highlighted the need for better supply chain efficiency. It's also become obvious that robots and automation provide a safe means for manufacturers to keep employees socially separated yet allow the business to continue operating. The use of robotics process automation (RPA) helps automate activities that are performed repeatedly.”

Given the Region’s logistical advantages and suite of desirable sites and a growing port, EDOs should continue to market sites and their logistical advantages to companies looking to expand their supply chain networks. The data below highlights the growth within the Region – outpacing the nation in employment and subsectors over the past 10 years.

| Distribution and Electronic Commerce (US Cluster Mapping) Industry Spotlight (10 Year Historic) | | | | |
|---|------------|-------|-------------------------------|---|
| | Employment | Wages | General Warehousing & Storage | Industrial Machinery and Equipment Merchant Wholesalers |
| SARPC Region | +2.7% | +1.7% | +26.7% | +3.6% |
| National | +2.1% | +2.2% | +10.6% | +0.8% |

- **Growing Subsectors for Regional Recruitment Efforts:** Refrigerated Warehousing & Storage, Ecommerce Distribution Facilities, Farm Product Warehousing & Storage

Information Technology Trends: Technology clusters over the last several decades have taken place in a few large metros – San Francisco, New York, Seattle. However, according to a new report from Brookings, the rise of remote work during the COVID-19 pandemic has spawned new hopes for the decentralization of tech. “Between 2010 and 2019, the tech sector grew by 47% and added more than 1.2 million jobs—nearly triple the growth of the economy as a whole. Not even COVID-19 could stymie this growth; although the sector’s expansion slowed during the initial pandemic-related lockdowns, it managed net positive growth through almost all of the crisis.”¹ While the data suggests the super metros will continue to have a majority share of the jobs, there are opportunities for smaller metros to succeed with the rise of remote work. Nearby regions such as Pensacola, Gulfport, Jackson and Tallahassee all added tech jobs at a high level during the first year of the pandemic. With the increased and targeted outreach, the South Alabama Region could reap some of those benefits as well.

Beyond tech jobs, there has been a massive increase in data center construction. Some 2.9 gigawatts worth of new data center construction is under way globally – up from 1.6 gigawatts in 2020 according to Cushman & Wakefield. Those data centers will be the first built specifically to meet the needs of a post-COVID world. With this growth, an expected accelerated trend is increased environmental sustainability. According to Vertiv, the data center industry has taken steps toward more climate-friendly practices in recent years, but operators will join the climate effort more purposefully in 2022. On the operational front, Vertiv experts predict some organizations will embrace sustainable energy strategies that utilize a digital solution that matches energy use with 100% renewable energy and ultimately operates on 24/7 sustainable energy.

The data below highlights the growth within the Region – outpacing the nation in wages and subsectors over the past 10 years.

| Information Technology and Analytical Instruments (US Cluster Mapping) Industry Spotlight (10 Year Historic) | | | | |
|---|------------|-------|---------------------|---|
| | Employment | Wages | Software Publishers | Computer Terminal & Other Computer Peripheral Equipment Manufacturing |
| SARPC Region | +0.5% | +3.7% | +19.3% | +1.5% |
| National | +2.0% | +4.8% | +7.0% | -3.8% |

- **Growing Subsectors for Regional Recruitment Efforts:** Media & Telecom Sectors (Component Manufacturing, Semiconductors, Gaming & Training Software Production), Data Processing, Software Publishing, Computer System Design and Related Services.

¹ Brookings: Coastal cities have dominated tech work. A new analysis shows the pandemic may be changing that.

Industry Sector Overview

The SARPC Region has a high concentration of Healthcare, Manufacturing, and Transportation & Warehousing industries. Numerous well-recognized domestic and foreign industries have made significant investments into the Region and adjacent areas, where they continue to thrive.

Healthcare and Manufacturing industries account for a large portion of the area's employment, especially in the regional forty-five-minute drive time. These industries, along with Transportation & Warehousing, have higher than average annual wages. Additionally, these industries create additional indirect and induced jobs that help diversify the economy.

The top five industries combined typically account for more than 50 percent of total employment. To help site selectors and business decision-makers understand the economic impact of a county or region, EDOs should consider posting the top five industry sectors from a county and regional perspective on their website. Many EDOs list manufacturing and transportation and warehousing as a target industry, therefore regardless of the rank, each sector is listed with its ranking.

FIGURE 2: BALDWIN COUNTY & 45-MINUTE DRIVE TIME SURROUNDING BALDWIN COUNTY TOP INDUSTRIES BY EMPLOYMENT

| NAICS | Top Industry Sectors in Baldwin County | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual Employment | Five-Year Forecast Annual Employment |
|-------|--|---------------------------------------|-------------------------|-----------------|--------------------------------------|--------------------------------------|
| 44 | 1) Retail Trade | 17.1% | 13,861 | \$32,940 | -0.4% | 1.0% |
| 72 | 2) Accommodation and Food Services | 15.2% | 12,341 | \$23,745 | -0.8% | 1.8% |
| 62 | 3) Health Care and Social Assistance | 11.9% | 9,645 | \$50,311 | 2.0% | 2.5% |
| 23 | 4) Construction | 7.2% | 5,865 | \$52,686 | 3.9% | 1.5% |
| 61 | 5) Educational Services | 7.1% | 5,799 | \$45,108 | 1.4% | 1.6% |
| 31 | 9) Manufacturing | 4.8% | 3,873 | \$52,057 | -2.0% | 0.9% |
| 48 | 12) Transportation and Warehousing | 3.0% | 2,403 | \$50,205 | 3.0% | 1.5% |
| | Total Employment | - | 81,140 | \$41,989 | 1.1% | 1.6% |

| NAICS | Top Industry Sectors in 45-Min. Drive Time | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual | Five-Year Forecast Annual |
|-------|--|---------------------------------------|-------------------------|-----------------|---------------------------|---------------------------|
| 62 | 1) Health Care and Social Assistance | 15.0% | 58,887 | \$56,761 | 0.7% | 1.3% |
| 44 | 2) Retail Trade | 13.1% | 51,488 | \$33,100 | -0.5% | -0.1% |
| 72 | 3) Accommodation and Food Services | 10.3% | 38,527 | \$20,814 | -1.2% | 0.9% |
| 31 | 4) Manufacturing | 7.5% | 29,476 | \$71,295 | -1.3% | -0.7% |
| 61 | 5) Educational Services | 7.3% | 28,560 | \$44,643 | -0.4% | 0.5% |
| 48 | 12) Transportation and Warehousing | 4.2% | 15,781 | \$54,419 | 1.9% | 0.1% |
| | Total Employment | - | 391,568 | \$48,392 | 0.1% | 0.5% |

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, and imputed where necessary. Data are updated through 2020Q4, with preliminary estimates updated to 2021Q1. Forecasted employment growth uses national projections adapted for regional growth patterns.

The **largest sector** in Baldwin County, Alabama, is Retail Trade, employing 13,861 workers, followed by Accommodation and Food Services (12,341) and Health Care and Social Assistance (9,645). Using a regional forty-five-minute drive time, Health Care and Social Assistance takes the lead, employing 58,887 workers, followed by Retail Trade (51,488) and Accommodation and Food Services (38,527).

High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the **highest LQs** in the County are Accommodation and Food Services (2.09), Utilities (1.93), and Real Estate and Rental and Leasing (1.75). Nearly the same is true from a regional perspective: Utilities (1.40), Accommodation and Food Services (1.35), and Retail Trade (1.26).

Sectors in Baldwin County, Alabama, with the highest average wages are Management of Companies and Enterprises (\$72,468), Finance and Insurance (\$72,294), and Utilities (\$69,741). Industry sectors with the best job growth over the last five years are Construction (+1,015), Health Care and Social Assistance (+906), and Administrative and Support and Waste Management and Remediation Services (+836).

Sectors within the regional forty-five-minute drive time with the highest average wages are Finance and Insurance (\$87,825), Mining, Quarrying, and Oil and Gas Extraction (\$83,838), and Utilities (\$78,990). Regional sectors with the best job growth over the last five years are Finance and Insurance (+3,227), Health Care and Social Assistance (+2,151), and Construction (+1,930).

Over the next five years, employment in Baldwin County is projected to expand by 6,614 jobs. The fastest growing sector in the County is expected to be Healthcare & Social Assistance, with a 2.5 percent annual growth rate. The strongest forecast by number of jobs over this period is Healthcare & Social Assistance (+1,257), followed by Accommodation and Food Services (+1,159) and Retail Trade (+702).

Five-year employment within the Region is projected to expand by 9,080 jobs. The fastest growing sector in the Region is expected to be Health Care and Social Assistance, with a 1.3 percent annual growth rate. The strongest forecast by number of jobs over this period is expected for Healthcare & Social Assistance (+3,907), followed by Accommodation and Food Services (+1,791), and Administrative and Support and Waste Management and Remediation Services (+948).

FIGURE 3: ESCAMBIA COUNTY & 45-MINUTE DRIVE TIME SURROUNDING ESCAMBIA COUNTY TOP INDUSTRIES BY EMPLOYMENT

| NAICS | Top Industry Sectors in Escambia County | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual Employment | Five-Year Forecast Annual Employment |
|-------|--|---------------------------------------|-------------------------|-----------------|--------------------------------------|--------------------------------------|
| 44 | 1) Manufacturing | 14.1% | 1,872 | \$55,734 | -2.2% | -0.8% |
| 72 | 2) Retail Trade | 12.8% | 1,693 | \$30,257 | -1.3% | -0.8% |
| 62 | 3) Public Administration | 12.4% | 1,643 | \$50,423 | 0.1% | -0.1% |
| 23 | 4) Health Care and Social Assistance | 9.4% | 1,253 | \$43,262 | -1.9% | 0.8% |
| 61 | 5) Arts, Entertainment, and Recreation | 8.7% | 1,155 | \$34,894 | -5.0% | -1.3% |
| 48 | 13) Transportation and Warehousing | 2.5% | 335 | \$55,483 | -4.4% | -0.6% |
| | Total Employment | - | 13,281 | \$42,409 | -1.1% | -0.3% |
| NAICS | Top Industry Sectors in 45-Min. Drive Time | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual | Five-Year Forecast Annual |
| 62 | 1) Manufacturing | 13.8% | 9,787 | \$62,397 | -0.5% | -0.4% |
| 44 | 2) Retail Trade | 12.5% | 8,968 | \$29,232 | 0.0% | 0.0% |
| 72 | 3) Health Care and Social Assistance | 10.0% | 7,083 | \$47,668 | -0.3% | 1.3% |
| 31 | 4) Construction | 8.9% | 6,211 | \$49,021 | 3.0% | 0.8% |
| 61 | 5) Educational Services | 8.5% | 6,043 | \$41,965 | 1.4% | 0.6% |

| | | | | | | |
|----|------------------------------------|------|---------------|-----------------|-------------|-------------|
| 48 | 10) Transportation and Warehousing | 4.6% | 3,243 | \$55,840 | 0.9% | 0.0% |
| | Total Employment | – | 70,653 | \$43,624 | 0.2% | 0.4% |

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, and imputed where necessary. Data is updated through 2020Q4, with preliminary estimates updated to 2021Q1. Forecasted employment growth uses national projections adapted for regional growth patterns.

The **largest sector** in Escambia County, Alabama, is Manufacturing, employing 1,872 workers, followed by Retail Trade (1,693) and Public Administration (1,643). From a regional forty-five-minute drive-time perspective, Manufacturing remains the largest sector, employing 9,787 workers, followed by Retail Trade (8,968) and Health Care and Social Assistance (7,083).

The sectors with the **largest LQs** in the Region are Arts, Entertainment, and Recreation (LQ = 5.50), Mining, Quarrying, and Oil and Gas Extraction (4.00), and Public Administration (2.50). From a regional perspective, Agriculture, Forestry, Fishing, and Hunting (1.94), Utilities (1.71), and Manufacturing (1.67) comprise the top three sectors.

Sectors in Escambia County with the highest average wages are Mining, Quarrying, and Oil and Gas Extraction (\$76,753), Utilities (\$72,300), and Management of Companies and Enterprises (\$72,166). Regional sectors with the best job growth over the last 5 years are Educational Services (+311 jobs), Administrative and Support and Waste Management and Remediation Services (+81), and Professional, Scientific, and Technical Services (+51).

Sectors within the regional forty-five-minute drive-time with the highest average wages per worker are Management of Companies and Enterprises (\$92,291), Mining, Quarrying, and Oil and Gas Extraction (\$83,643), and Utilities (\$62,444). Regional sectors with the highest job growth over the last five years are Construction (+865), Professional, Scientific, and Technical Services (+427), and Educational Services (+410).

Over the next five years, employment in Escambia County, Alabama, is projected to decline by 204 jobs. However, growth is projected for Mining, Quarrying, and Oil and Gas Extraction, with a 1.2 percent annual growth rate. The strongest forecasts by number of jobs over this period are for Health Care and Social Assistance (+49), Accommodation and Food Services (+15), and Mining, Quarrying, and Oil and Gas Extraction (+12).

Regional employment is projected to grow by 1,514 jobs. The fastest growing sector in the Region is expected to be Health Care and Social Assistance, with a 1.3 percent annual growth rate. The strongest growth forecasts by number of jobs over this period are for Health Care and Social Assistance (+466), Accommodation and Food Services (+323), and Construction (+240).

**FIGURE 4: MOBILE COUNTY & 45-MINUTE DRIVE TIME SURROUNDING MOBILE COUNTY
TOP INDUSTRIES BY EMPLOYMENT**

| NAICS | Top Industry Sectors in Mobile County | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual Employment | Five-Year Forecast Annual Employment |
|-------|---|---------------------------------------|-------------------------|-----------------|--------------------------------------|--------------------------------------|
| 62 | 1) Health Care and Social Assistance | 15.1% | 26,648 | \$57,193 | 0.6% | 1.1% |
| 44 | 2) Retail Trade | 11.4% | 20,113 | \$33,382 | -1.2% | -0.3% |
| 31 | 3) Manufacturing | 10.3% | 18,148 | \$78,354 | -1.7% | -1.0% |
| 72 | 4) Accommodation and Food Services | 8.0% | 14,191 | \$18,334 | -2.3% | 0.7% |
| 56 | 5) Administrative and Support and Waste Management and Remediation Services | 8.0% | 14,171 | \$32,120 | 1.2% | 0.2% |
| 48 | 9) Transportation and Warehousing | 5.7% | 10,068 | \$51,979 | 1.2% | -0.4% |
| | Total Employment | - | 176,849 | \$51,076 | -0.7% | -0.3% |
| NAICS | Top Industry Sectors in 45-Min. Drive Time | Sector Percentage of Total Employment | Total Sector Employment | Average Wages | Five-Year Historic Annual | Five-Year Forecast Annual |
| 62 | 1) Health Care and Social Assistance | 13.4% | 44,739 | \$55,140 | 0.9% | -0.4% |
| 44 | 2) Retail Trade | 12.4% | 41,441 | \$32,119 | -0.7% | 0.0% |
| 72 | 3) Manufacturing | 12.1% | 40,522 | \$78,430 | -1.1% | 1.3% |
| 31 | 4) Accommodation and Food Services | 8.9% | 29,635 | \$19,533 | -1.2% | 0.8% |
| 61 | 5) Educational Services | 7.4% | 24,751 | \$44,480 | -0.9% | 0.6% |
| 48 | 12) Transportation and Warehousing | 4.2% | 13,945 | \$53,364 | 1.6% | -0.1% |
| | Total Employment | - | 333,957 | \$50,163 | -0.2% | 0.2% |

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, and imputed where necessary. Data is updated through 2020Q4, with preliminary estimates updated to 2021Q1. Forecasted employment growth uses national projections adapted for regional growth patterns.

The **largest sector** in Mobile County, Alabama, is Health Care and Social Assistance, employing 26,648 workers, followed by Retail Trade (20,113) and Manufacturing (18,148). From a regional forty-five-minute drive-time perspective, the same sectors form the top three: Health Care and Social Assistance employs 44,739 workers, Retail Trade employs 41,441 workers, and Manufacturing employs 40,522.

The sectors with **the highest LQs** in the County are Other Services (except Public Administration) (1.35), Utilities (1.35), and Administrative and Support and Waste Management and Remediation Services (1.27). Within a forty-five-minute drive time, the highest LQs shift to Utilities (1.56), Manufacturing (1.47), and Construction (1.23).

Sectors in Mobile County with the highest average wages are Management of Companies and Enterprises (\$111,332), Finance and Insurance (\$91,523), and Utilities (\$89,635). Regional sectors with the best job growth over the last five years are Administrative and Support and Waste Management and Remediation Services (+828), Health Care and Social Assistance (+780), and Transportation & Warehousing (+565).

Sectors within the regional forty-five-minute drive time with the highest average wages per worker are Mining, Quarrying, and Oil and Gas Extraction (\$86,238), Finance and Insurance (\$86,022), and Utilities (\$80,179). Regional sectors with the best job growth over the last five years are Finance and Insurance (+2,827), Health Care and Social Assistance (+1,868), and Transportation & Warehousing (+1,078).

Over the next five years, employment in Mobile County is projected to decline by 2,304 jobs. However, growth is projected for Health Care and Social Assistance, with a 0.6 percent annual growth rate. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+846), Administrative and Support and Waste Management and Remediation Services (+127), and Professional, Scientific, and Technical Services (+117).

Employment growth projections within the Region total 2,929 jobs. The fastest growing sector in the Region is expected to be Health Care and Social Assistance, with a 1.1 percent annual growth rate. The strongest forecast by number of jobs over this period is for Health Care and Social Assistance (+2,538), Accommodation and Food Services (+1,038), and Administrative and Support and Waste Management and Remediation Services (+535).

Top Industry Sector Key Takeaways //

Depending on the industry sector, the site selection process typically begins at the State or regional level. The regional level can be defined as the concentration around a desired city, which may include a metropolitan or micropolitan area; a region can also be defined as the service territory of a utility (i.e., Alabama Power’s service territory or the Mobile Region Laborshed). Understanding a county and a region’s position compared to other regions helps the EDO better develop its competitive advantage.

- Mobile County has one of the highest employment volumes of Manufacturing employment in the State.

| By Place of Work | | By Place of Residence | |
|---------------------------|--------|---------------------------|--------|
| Jefferson County, Alabama | 29,083 | Jefferson County, Alabama | 23,491 |
| Madison County, Alabama | 21,919 | Mobile County, Alabama | 16,479 |
| Mobile County, Alabama | 17,861 | Madison County, Alabama | 16,072 |

- Mobile and Baldwin Counties have some of the highest concentrations of Transportation, Distribution, and Logistics employment in the State.

| By Place of Work | | By Place of Residence | |
|----------------------------|--------|----------------------------|--------|
| Jefferson County, Alabama | 30,345 | Jefferson County, Alabama | 23,053 |
| Mobile County, Alabama | 17,853 | Mobile County, Alabama | 16,257 |
| Madison County, Alabama | 14,160 | Madison County, Alabama | 10,563 |
| Montgomery County, Alabama | 11,764 | Montgomery County, Alabama | 7,740 |
| Tuscaloosa County, Alabama | 7,603 | Baldwin County, Alabama | 7,063 |
| Shelby County, Alabama | 7,093 | Shelby County, Alabama | 6,832 |
| Lee County, Alabama | 5,677 | Tuscaloosa County, Alabama | 6,744 |
| Baldwin County, Alabama | 5,585 | Lee County, Alabama | 5,761 |

- Baldwin County is the only location in the Region expected to experience growth in all its top five industry sectors over the next five years. While employment in Escambia County and Mobile County is expected to decline overall, there is still strong growth in a variety of sectors, including Health Care and Social Assistance—a reflection of higher-than-average county wages.

Clusters »

JobsEQ® defines twenty-two industry clusters, which are geographic concentrations of interrelated industries or occupations. Industry clusters can form and grow because of a region’s competitive advantages, such as geographic location, transportation infrastructure, trained and skilled labor, and education systems and programs.

A cluster’s growth rate is the annual average percentage change in employment over a given period—historical or forecasted. **Growth forecasts are based on a long-term national industry and occupation forecast that has been modified for regional growth expectations and may not reflect short-term or regional fluctuations.**

To identify and/or validate target industry clusters, each EDO should consider three factors:

1. industries projected to grow over the next ten years;
2. industries in which the Region has a high LQ (greater than 1, ideally 1.25 or higher); and
3. industries with a higher-than-average wage compared to the Region or the nation (indicated in Figures 2–4).

Average wage and LQ data on the following pages is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics (imputed by Chmura where necessary) and updated through 2020Q4, with preliminary estimates by Chmura updated to 2021Q1. Forecasted employment growth uses national projections from the Bureau of Labor Statistics for 2019–2029, adapted for regional growth patterns by Chmura.

FIGURE 5: BALDWIN COUNTY INDUSTRY CLUSTERS ANNUAL GROWTH FORECAST

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------|--|---------------|------|
| Health | 2.48 | \$50,561 | 0.80 |
| Utilities | 1.81 | \$50,883 | 1.00 |
| Consumer Services | 1.79 | \$26,746 | 1.69 |
| Professional Services | 1.68 | \$46,216 | 0.64 |
| Education | 1.64 | \$40,633 | 0.94 |
| Public Administration | 1.54 | \$50,442 | 1.11 |
| Construction | 1.45 | \$52,762 | 1.22 |
| Financial Services | 1.36 | \$75,056 | 0.64 |
| Freight Transportation | 1.32 | \$52,664 | 0.72 |
| Agricultural | 1.28 | \$39,577 | 0.96 |
| Auto/Auto-Related | 1.27 | \$48,532 | 0.73 |
| Machinery Manufacturing | 1.19 | \$62,245 | 1.15 |
| Retail | 1.01 | \$37,259 | 1.37 |
| Textile/Leather | 0.86 | \$39,337 | 0.75 |
| Coal/Oil/Power | 0.68 | \$70,800 | 1.03 |
| Wood/Paper | 0.66 | \$48,749 | 1.52 |

FIGURE 6: BALDWIN COUNTY FORTY-FIVE-MINUTE DRIVE TIME INDUSTRY CLUSTERS ANNUAL GROWTH FORECAST

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------------|--|---------------|------|
| Health | 1.29 | \$56,761 | 1.01 |
| Consumer Services | 0.81 | \$25,151 | 1.15 |
| Utilities | 0.67 | \$56,268 | 1.42 |
| Professional Services | 0.60 | \$48,982 | 0.81 |
| Education | 0.53 | \$39,786 | 0.95 |
| Public Administration | 0.45 | \$52,105 | 0.82 |
| Auto/Auto-Related | 0.45 | \$49,259 | 1.03 |
| Construction | 0.42 | \$52,679 | 1.22 |
| Financial Services | 0.21 | \$87,823 | 1.08 |
| Agricultural | 0.20 | \$47,476 | 0.58 |
| Freight Transportation | -0.07 | \$60,035 | 1.01 |
| Retail | -0.09 | \$39,156 | 1.17 |
| Chemical | -0.43 | \$90,973 | 1.14 |
| Wood/Paper | -0.44 | \$66,161 | 1.19 |
| Metal & Product Manufacturing | -0.62 | \$72,598 | 1.50 |
| Textile/Leather | -0.68 | \$46,000 | 0.88 |
| Coal/Oil/Power | -0.89 | \$95,505 | 0.86 |
| Machinery Manufacturing | -1.02 | \$73,193 | 1.54 |

FIGURE 7: ESCAMBIA COUNTY INDUSTRY CLUSTERS ANNUAL GROWTH FORECAST

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------------|--|---------------|-------|
| Health | 0.76 | \$43,081 | 0.63 |
| Coal/Oil/Power | 0.53 | \$82,325 | 2.70 |
| Machinery Manufacturing | 0.03 | \$43,582 | 0.97 |
| Public Administration | -0.10 | \$46,303 | 2.73 |
| Auto/Auto-Related | -0.22 | \$44,930 | 1.67 |
| Construction | -0.23 | \$41,928 | 0.78 |
| Utilities | -0.30 | \$49,460 | 1.06 |
| Financial Services | -0.34 | \$51,053 | 0.75 |
| Education | -0.36 | \$35,730 | 0.90 |
| Metal & Product Manufacturing | -0.39 | \$47,957 | 2.46 |
| Consumer Services | -0.49 | \$25,173 | 1.35 |
| Retail | -0.73 | \$34,156 | 1.04 |
| Freight Transportation | -0.81 | \$58,722 | 0.79 |
| Agricultural | -0.93 | \$30,092 | 1.18 |
| Wood/Paper | -0.99 | \$62,867 | 7.76 |
| Textile/Leather | -1.34 | \$41,591 | 11.35 |

FIGURE 8: ESCAMBIA COUNTY FORTY-FIVE-MINUTE DRIVE TIME INDUSTRY CLUSTERS ANNUAL GROWTH FORECAST

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------------|--|---------------|------|
| Health | 1.28 | \$47,668 | 0.67 |
| Professional Services | 0.85 | \$43,860 | 0.55 |
| Consumer Services | 0.80 | \$23,122 | 1.00 |
| Utilities | 0.67 | \$47,070 | 1.31 |
| Education | 0.65 | \$37,933 | 1.06 |
| Construction | 0.61 | \$49,602 | 1.53 |
| Public Administration | 0.60 | \$45,982 | 1.54 |
| Machinery Manufacturing | 0.41 | \$55,119 | 1.02 |
| Auto/Auto-Related | 0.10 | \$44,661 | 1.57 |
| Coal/Oil/Power | 0.06 | \$81,353 | 1.36 |
| Retail | -0.04 | \$33,485 | 1.05 |
| Chemical | -0.09 | \$85,656 | 1.94 |
| Freight Transportation | -0.26 | \$58,181 | 1.37 |
| Agricultural | -0.30 | \$45,005 | 1.51 |
| Wood/Paper | -0.85 | \$59,992 | 5.80 |
| Textile/Leather | -0.90 | \$43,679 | 3.41 |
| Metal & Product Manufacturing | -0.95 | \$72,088 | 2.63 |

FIGURE 9: MOBILE COUNTY INDUSTRY CLUSTERS ANNUAL GROWTH FORECAST

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------------|--|---------------|------|
| Health | 0.63 | \$57,390 | 1.01 |
| Utilities | 0.18 | \$58,621 | 1.99 |
| Professional Services | 0.08 | \$51,503 | 0.90 |
| Auto/Auto-Related | 0.04 | \$53,693 | 0.96 |
| Consumer Services | -0.03 | \$23,866 | 0.98 |
| Education | -0.12 | \$40,925 | 0.94 |
| Construction | -0.33 | \$54,399 | 1.13 |
| Financial Services | -0.36 | \$94,023 | 0.75 |
| Public Administration | -0.41 | \$55,383 | 0.82 |
| Agricultural | -0.50 | \$57,679 | 0.52 |
| Freight Transportation | -0.60 | \$57,297 | 1.37 |
| Chemical | -0.79 | \$99,105 | 1.49 |
| Metal & Product Manufacturing | -0.93 | \$80,876 | 3.51 |
| Retail | -0.96 | \$41,260 | 1.08 |
| Textile/Leather | -1.19 | \$28,967 | 0.65 |
| Wood/Paper | -1.32 | \$76,352 | 1.19 |
| Machinery Manufacturing | -1.67 | \$75,009 | 1.96 |
| Coal/Oil/Power | -2.05 | \$102,050 | 0.83 |

**FIGURE 10: MOBILE COUNTY FORTY-FIVE-MINUTE DRIVE TIME INDUSTRY CLUSTERS
ANNUAL GROWTH FORECAST**

| Industry Group | 2021–2031 Average Annual Sector Growth Rate Forecast | Average Wages | LQ |
|-------------------------------|--|---------------|------|
| Health | 1.11 | \$55,140 | 0.90 |
| Consumer Services | 0.58 | \$23,867 | 1.03 |
| Utilities | 0.50 | \$57,546 | 1.59 |
| Professional Services | 0.39 | \$50,012 | 0.74 |
| Auto/Auto-Related | 0.36 | \$50,070 | 0.96 |
| Education | 0.27 | \$39,463 | 0.96 |
| Construction | 0.24 | \$53,250 | 1.24 |
| Public Administration | 0.19 | \$51,897 | 0.87 |
| Financial Services | 0.11 | \$86,020 | 1.09 |
| Agricultural | 0.02 | \$49,816 | 0.80 |
| Freight Transportation | -0.24 | \$58,106 | 1.03 |
| Retail | -0.28 | \$38,298 | 1.09 |
| Chemical | -0.53 | \$94,294 | 1.32 |
| Wood/Paper | -0.62 | \$65,625 | 1.29 |
| Textile/Leather | -0.76 | \$46,142 | 1.04 |
| Metal & Product Manufacturing | -0.77 | \$77,096 | 2.12 |
| Coal/Oil/Power | -0.90 | \$115,856 | 1.63 |
| Machinery Manufacturing | -1.41 | \$76,533 | 3.28 |

Product Review & Optimization

Review of Select Sites »

Available product plays a critical role in a successful economic development approach. This is even more important as it pertains to a regional, multi-county approach. Having a diverse catalogue of sites to present to select markets will move the needle in terms of potential project locations. Understanding that potential and continually reviewing and updating the status of all available sites is crucial moving forward.

VisionFirst has reviewed a selection of each county's available property through the lens of a site selector. It is important to understand the story that websites and partner databases are telling about available product; so, while there were in-person site visits, the reviews below were conducted virtually and represent how the sites are viewed externally. The following comments are made based on information available at the time and do not consider local knowledge and information.

Baldwin County //

Daphne Innovation and Science Complex (DISC)

Located adjacent to Daphne High School, DISC is a thirty-acre park focused on attracting Class A office space to support a growing STEM cluster. Continued high growth, in conjunction with significant educational attainment levels throughout the County, offer significant potential to the site. Existing building plans including six office buildings are available.

| Attributes | Challenges |
|--|--|
| <ul style="list-style-type: none">Walking distance from school | <ul style="list-style-type: none">Not marketed on partner databasesNo site information on websiteGlobal decline in office space demand |

Industry Opportunities:

- Information Technology:** NAICS Code 5182 – Data Processing, Hosting & Related Services; NAICS Code 54151 – Computer Systems Design and Related Services; NAICS Code 3341 – Computer and Peripheral Equipment Manufacturing
- Management, Scientific and Technical Services** – NAICS Code 5414
- Corporate Subsidiary and Regional Managing Offices** – NAICS Code 551114

South Alabama Mega Site

The Mega Site offers the Region a sizable opportunity to compete for large-scale manufacturing projects that are considering the southeast. Only a handful of sites throughout the surrounding states can compare in size, and even fewer compare from an infrastructure standpoint. From I-65 on one end to the CSX mainline on the other, Mega Site offers a range of logistical advantages to prospective companies. Significant investment has been made by State and local partners not only to certify the site but also to continue to increase the capacity of the available infrastructure.

| Attributes | Challenges |
|---|---|
| <ul style="list-style-type: none"> • 2,362 acres of developable industrial property • All utilities located on site • Certified Mega Site • Existing building pad available • CSX mainline adjacent to site • I-65 and AL 287 adjacent to site • Single owner • No significant environmental findings | <ul style="list-style-type: none"> • Remote feel in terms of rooftops • Higher per-acre cost than competitors • Potential wetlands could impact flexibility • Not viewed as a regional asset by neighbors |

Industry Opportunities:

- **Automotive/Racing:** NAICS Code 7112 – Spectator Sports; NAICS Code 423110 – Automobile and Other Motor Vehicle Merchant Wholesalers; NAICS Code 336111 – Automobile Manufacturing
- **Aviation & Aerospace:** NAICS Code 4881 – Support Activities for Air Transportation; NAICS Code 336412 – Aircraft Engine and Engine Parts Manufacturing
- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Food Processing:** NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3114 – Fruit and Vegetable Preserving and Specialty Food Manufacturing
- **General Freight and Logistics:** NAICS Code 4841 – General Freight Trucking; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Information Technology:** NAICS Code 5182 – Data Processing, Hosting & Related Services; NAICS Code 54151 – Computer Systems Design and Related Services; NAICS Code 3341 – Computer and Peripheral Equipment Manufacturing
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing

Gulf Shores Business & Aviation Park

Located adjacent to Jack Edwards National Airport, this seventy-eight-acre aviation park offers full utilities. With proximity to SR 59 and limited use of a 6,900' and a 3,600' runway, there are possibilities for development within the aerospace industry. The light industry designation suggests a focus on MRO, light assembly, and component manufacturers.

| Attributes | Challenges |
|--|---|
| <ul style="list-style-type: none"> • Direct runway access • All utilities in place • Phase I environmental completed • Variety of parcel options available | <ul style="list-style-type: none"> • Two-lane entrance to the park • Subject to FAA guidelines and restrictions • No rail access • Local economy focused on tourism |

Industry Opportunities:

- **Aviation & Aerospace:** NAICS Code 4881 – Support Activities for Air Transportation; NAICS Code 336412 – Aircraft Engine and Engine Parts Manufacturing
- **General Freight and Logistics:** NAICS Code 4841 – General Freight Trucking; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Light Manufacturing:** NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Foley Beach Express Industrial Park

Positioned just east of Naval Outlying Landing Field Barin, this 190-acre industrial park offers parcels as large as 150 acres. With the four-lane Baldwin Beach Express bisecting the park and all utilities running in parallel, the site offers significant industrial applications.

| Attributes | Challenges |
|---|--|
| <ul style="list-style-type: none"> • All utilities in place • Phase I environmental completed • Four-lane access to State Highway 59 • Limited slope affecting construction | <ul style="list-style-type: none"> • Relatively expensive for industrial • No rail access • Potential restrictions from naval landing field |

Industry Opportunities:

- **Aviation & Aerospace:** NAICS Code 4881 – Support Activities for Air Transportation; NAICS Code 336412 – Aircraft Engine and Engine Parts Manufacturing
- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Escambia County //

Rivercane Industrial Park

With significant frontage along I-65 and SR 21 comprising the eastern border, Rivercane Industrial Park is well suited for future growth. The site is also in proximity to Coastal Alabama Community College, promising considerable synergy in terms of talent pipeline.

| Attributes | Challenges |
|--|---|
| <ul style="list-style-type: none">• I-65 / SR 21 frontage• 235-acre parcel available• All utilities on site• Emergency services in proximity• Phase I environmental completed• Innovation Parkway completed | <ul style="list-style-type: none">• Zoned for light industrial, limiting some industry• No rail access |

Industry Opportunities:

- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **General Freight and Logistics:** NAICS Code 4841 – General Freight Trucking; NAICS Code 4931 – Warehousing and Storage
- **Light Manufacturing:** NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Atmore Industrial Park

Atmore Industrial Park has more than 300 acres available for heavy industry development. With the CSX mainline running along the southern border, this site represents a significant opportunity to attract rail-dependent projects.

| Attributes | Challenges |
|---|--|
| <ul style="list-style-type: none">• CSX mainline access• All utilities on site• Phase I environmental complete• Competitive pricing• Cleared site• Zoned heavy industry• Transloading & Storage• New rail spur | <ul style="list-style-type: none">• No direct interstate access• Two-lane access road to largest track• Residential in proximity |

Industry Opportunities:

- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Food Processing:** NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3114 – Fruit and Vegetable Preserving and Specialty Food Manufacturing
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

JFTMA Site

JFTMA is a 445-acre site bisected by U.S. 31 and the CSX mainline. It abuts the Atmore Industrial Park and the Atmore Country Club. Rail access and competitive pricing give this site potential, but access to the interstate and surrounding entities could pose challenges to industry location.

| Attributes | Challenges |
|--|--|
| <ul style="list-style-type: none">• CSX mainline access• All utilities on site• Phase I environmental complete• Competitive pricing• Northern parcel could combine with Atmore Industrial Park to offer larger track | <ul style="list-style-type: none">• No dimensions available• Country club adjacent to site• No direct interstate access• No zoning• Limited access to some parcels |

Industry Opportunities:

- **Creative Economy:** NAICS Code 5121 – Motion Picture and Video Industries; NAICS Code 5414 – Specialized Design Services; NAICS Code 7111 – Performing Arts Companies; NAICS Code 7115 – Independent Artists, Writers and Performers
- **Light Manufacturing:** NAICS Code 3119 – Other Food Manufacturing; NAICS Code – 3121 Beverage Manufacturing

Downing Property

The Downing Property potentially represents the City of Brewton’s best industrial property in terms of a rail served site. The property totals over 77 acres. With CSX mainline bisecting the property and an adjacent CSX facility along with four lane divided Highway 31 frontage there is significant expansion and new business location potential. To realize this potential more due diligence must be done to better understand potential wetlands challenges.

| Attributes | Challenges |
|---|--|
| <ul style="list-style-type: none"> • CSX mainline access • All utilities on site • Southern Pine Electric adjacent • Cleared site • Zoned light industrial | <ul style="list-style-type: none"> • No direct interstate access • No existing rail spur • Wetlands on property • No Phase 1 Environmental |

Industry Opportunities:

- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Mobile County //

Movico

This site, located north of downtown and adjacent to U.S. 43, offers potential water and rail access. The site comprises 600 acres of property, with over 300 acres of developable industrial land. The Norfolk Southern mainline runs adjacent to the western side of the property, and the Mobile River makes up a portion of the eastern boundary. While all utilities are available on site, the Alabama Power transmission line bisects the site, effectively subdividing it. Significant unknowns present risk, but sites with highway, rail, and water access are rare and thus worth the investment to understand the potential.

| Attributes | Challenges |
|---|---|
| <ul style="list-style-type: none"> • Norfolk Southern mainline access • Potential water access on Mobile River • All utilities to the site • Proximity to divided four-lane highway | <ul style="list-style-type: none"> • Potential wetlands concerns • Adjacent residential • Access concerns over/under rail to U.S. 43 • Unknowns concerning costs of land/infrastructure |

Industry Opportunities:

- **Agribusiness:** NAICS Code 1151 – Support Activities for Crop Production; NAICS Code 1114 – Greenhouse, Nursery, and Floriculture Production
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Salco 43

Salco 43 is a 220-acre site on the corner of U.S. 43 and Salco Rd. The A&G short line runs along the western border of the site; combined with access to I-65 from U.S. 43, the site possesses significant logistical advantages. Wetlands comprising the northern boundary of the site and lack of control over potential Salco Rd. developments could be viewed as risks by site prospects.

| Attributes | Challenges |
|--|---|
| <ul style="list-style-type: none"> • Adjacent to A&G Railroad • Phase I environmental completed • All utilities on site • Divided highway access | <ul style="list-style-type: none"> • No control over southern boundary development • Wetlands along the northern boundary • No zoning • Difficult to show due to lack of clearing |

Industry Opportunities:

- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **General Freight and Logistics:** NAICS Code 4841 – General Freight Trucking; NAICS Code 4931 – Warehousing and Storage
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3331 – Agriculture, Construction, and Mining Machinery Manufacturing

Virginia Station

Positioned on two-lane Radcliff Rd. two miles from I-65, the Virginia Station site offers up to 217 acres of developable property. With multiple clearings and access roads already developed, the site shows well for industrial development. Gunnison Creek, which forms the northern border of the site, and the waterway to the west could concern site prospects.

| Attributes | Challenges |
|--|---|
| <ul style="list-style-type: none"> • Interstate proximity • Surrounding industrial presence • All utilities on site • Phase I environmental completed • Adjacent to AGR railway | <ul style="list-style-type: none"> • No zoning • Potential wetlands issues • Uncompetitive pricing |

Industry Opportunities:

- **Automotive/Racing:** NAICS Code 7112 – Spectator Sports; NAICS Code 423110 – Automobile and Other Motor Vehicle Merchant Wholesalers
- **Distribution:** NAICS Code 4931 – Warehousing and Storage; NAICS Code 4248 – Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
- **General Freight and Logistics:** NAICS Code – 4841 General Freight Trucking; NAICS Code 4931 – Warehousing and Storage
- **Manufacturing:** NAICS Code 3261 – Plastics Product Manufacturing; NAICS Code 3273 – Cement and Concrete Product Manufacturing; NAICS Code 3121 – Beverage Manufacturing; NAICS Code 3119 – Other Food Manufacturing; NAICS Code – 3331 Agriculture, Construction, and Mining Machinery Manufacturing

Brookley by the Bay

This 327-acre site is the former site of Brookley Air Force Base. The site sits just outside the FAA fence at the Aeroplex and has potential waterfront access to Mobile Bay, giving it potential for both runway and water access. The property being purchased by the City of Mobile and turned over to the Industrial Development Board (IDB) is a promising signal to prospective industry.

| Attributes | Challenges |
|---|---|
| <ul style="list-style-type: none">• Potential runway and water access• All utilities on site• IDB site ownership and control• Proximity to I-10 and APM intermodal• Outside of FAA regulations• Phase I environmental complete | <ul style="list-style-type: none">• Lack of ingress and egress improvements• No current water access• Current price over \$400,000/acre• No zoning |

Industry Opportunities:

- **Aviation & Aerospace:** NAICS Code 4881 – Support Activities for Air Transportation; NAICS Code 336412 – Aircraft Engine and Engine Parts Manufacturing
- **Boat Manufacturing:** NAICS Code 336612 – Boat Building; NAICS Code 332312 – Fabricated Structural Metal Manufacturing
- **Light Manufacturing:** NAICS Code 3119 – Other Food Manufacturing; NAICS Code 3121 – Beverage Manufacturing

Sites Summary »

The strength of the sites in the SARPC Region lies in their diversity. Throughout the three counties, there is significant product that can attract a wide range of industry opportunities.

One of the challenges to those opportunities being realized is ensuring the message gets to its target audience. While the competition in economic development is greater than ever, so is the ability to get site information in front of decision-makers. Many of the sites have presented clear information—but there is still much more to be done.

Pre-pandemic, having an online presence and ample marketing collateral to connect with customers was considered a competitive advantage. Today, online databases and marketing materials are vital for promoting industrial products and assets within a community or MSA. Ultimately, they increase a community's credibility and chance to win competitive projects.

The following should be considered in the presentation of all available sites in the Region:

- **Strong Visuals:** EDOs can now get in front of a much larger audience and can present product directly to decision-makers. To do so effectively, visuals are key. From satellite views to drone footage to utility maps, organizations must ensure readers have the information they need to understand the value of the site for their client or company.
- **Risk Mitigation:** Site control and environmental issues can be perceived as risks to a prospective client. Ensure the narrative clearly defines ownership of the property. If it is privately held but has current options, express this as a means of reassuring the reader. If a site contains creeks or waterways, include a topography and flood plain map. Due diligence and fact sheets offer a more concrete understanding of the product and pay dividends in the long run.
- **Presentation:** First impressions are everything, especially for those looking to stand out in a highly competitive market. Do not rely on prospects navigating large databases to find the properties you want to present. Provide a landing page that highlights featured sites and associated due diligence to ensure ease of access to relevant information. While sending prospects to a partner or State database is not a negative, at that point a local site becomes just one of many they will navigate through; it is crucial not to leave that navigation to chance.

Workforce Review & Alignment

Labor Force Characteristics »

A skilled workforce and a strong talent pipeline are necessary to ensure the economic health and stability of a region, and the quality of a region’s labor force is a top driver in competitive projects. A region’s supply of and demand for labor has a direct impact on markets for capital, goods, and services. While no single number captures the nuances in the health of a region’s labor market, the data was assessed from a variety of perspectives.

As with the economic overview, data can enable internal stakeholders to determine the strengths and weaknesses of the occupation characteristics within a region, helping them shape key messaging points. Utilizing both qualitative and quantitative data can highlight the Region’s current and emerging labor market advantages, while mitigating any perceived or real challenges to external stakeholders.

TABLE OF FIGURES

*This section of the plan contains a considerable amount of data and charts. A table of figures is provided below. **Unless otherwise noted, all data refers to the SARPC Region.***

| | |
|--|----|
| Figure 11: Labor Force Participation by County, Age, Gender and Degree | 47 |
| Figure 12: Education Level vs. Requirements – SARPC Region | 48 |
| Figure 13: Education Level vs. Requirements – Baldwin County Forty-Five-Minute Drive Time | 49 |
| Figure 14: Education Level vs. Requirements – Escambia County Forty-Five-Minute Drive Time | 49 |
| Figure 15: Education Level vs. Requirements – Mobile County Forty-Five-Minute Drive Time | 50 |
| Figure 16: Underemployment in All Occupations | 51 |
| Figure 17: Underemployment in Manufacturing (CTE Cluster) | 53 |
| Figure 18: Underemployment in Transportation, Distribution, and Logistics (CTE Cluster) | 55 |
| Figure 19: Turnover Rates in Manufacturing and Transportation & Warehousing..... | 57 |
| Figure 20: Inbound and Outbound Commuting Patterns..... | 59 |
| Figure 21: All Program Certificates and Degrees by School – SARPC Regional Laborshed | 61 |
| Figure 22: Certificates and Degrees by Manufacturing (CTE Cluster) Programs – SARPC Regional Laborshed | 62 |
| Figure 23: Certificates and Degrees by Transportation, Distribution, and Logistics (CTE Cluster) Programs – SARPC Regional Laborshed..... | 64 |
| Figure 24: Manufacturing (CTE Cluster) CIP SOC Crosswalk – SARPC Regional Laborshed..... | 66 |
| Figure 25: Transportation, Distribution, and Logistics (Career & Technical Education Cluster) CIP to SOC Crosswalk – SARPC Regional Laborshed..... | 75 |
| Figure 26: Potential Average Annual Occupation Gap and Demands over Ten Years | 83 |

Unless otherwise noted, all data is from Chmura’s JobsEQ® 2021Q1.

Understanding Labor Force Participation Rates //

The labor force participation rate measures the percentage of citizens who either have a job or are looking for work. Before examining the U.S. Census data for the SARPC Region, it is important to understand the components that comprise the labor force participation rate, the factors that might cause it to rise or fall, and the current state of the national labor force.

For national and State participation numbers, the population is made up of the civilian noninstitutional population. That is everyone living in the U.S. who is 16 or older, except inmates of institutions such as prisons, nursing homes, and mental hospitals and those on active duty in the Armed Forces.

The national labor force participation rate rose to 63 percent in the 1980s and reached a peak of 67.3 percent in January 2000—around the time when the oldest baby boomers (those born 1946–64)—began reaching age 55. Following the 2001 recession, participation rates began to decline; that decline accelerated during the 2008 recession.

Until 2020, the female labor force participation rate had steadily inclined for decades. During the pandemic, however, women experienced disproportionate job losses as schools, day cares, and elder care facilities closed, causing many women to leave the workforce to care for children, elderly parents, or sick family members.

Nationally, male workforce participation has been steadily falling over the past fifty years, from 80 percent in 1970 to 69 percent in 2021. Reasons for the trend include deteriorating health conditions and a rise in opioid usage. Another reason is that males without a college degree have left the workforce, due in part to college graduates earning 56 percent more than high school graduates, according to data from the Economic Policy Institute.

Other factors that contribute to declining labor force participation rates include the number of people living in rural areas (who are disconnected from job epicenters), government income transfers such as Social Security and unemployment benefits, and the high level of people who do not have a high school diploma.

Labor Force Participation Rates //

To further understand the Region’s competitive advantages and shortfalls, Counties within SARPC’s regional labor pool were assessed by overall labor force participation rate, as well as participation rate by age group, gender, and educational attainment.

FIGURE 11: LABOR FORCE PARTICIPATION BY COUNTY, AGE, GENDER AND DEGREE

| Location | Overall | 25–29 | 30–34 | 35–44 | 45–54 | Male | Female | Some College or Associate Degree | Bachelor's Degree+ |
|------------------------|---------|-------|-------|-------|-------|-------|--------|----------------------------------|--------------------|
| U.S. | 63.4% | 83.0% | 82.9% | 82.8% | 80.8% | 82.4% | 73.0% | 79.3% | 86.7% |
| Alabama | 57.4% | 79.3% | 79.4% | 78.4% | 74.1% | 76.7% | 66.5% | 75.3% | 84.3% |
| Baldwin (AL) | 57.7% | 79.3% | 79.1% | 82.6% | 80.2% | 79.9% | 68.6% | 75.0% | 83.3% |
| Mobile (AL) | 56.8% | 76.7% | 79.9% | 78.0% | 72.1% | 75.3% | 66.2% | 74.0% | 86.0% |
| Escambia (AL) | 48.2% | 67.8% | 67.5% | 60.4% | 62.6% | 57.5% | 64.8% | 71.5% | 82.7% |
| Escambia (FL) | 60.8% | 83.9% | 83.8% | 80.5% | 76.8% | 78.9% | 71.2% | 76.0% | 84.2% |
| Santa Rosa (FL) | 59.2% | 78.5% | 78.7% | 76.4% | 72.9% | 75.6% | 68.8% | 75.3% | 81.3% |
| Okaloosa (FL) | 63.8% | 82.5% | 81.1% | 80.1% | 79.9% | 84.9% | 69.2% | 76.9% | 84.3% |
| Covington (AL) | 49.5% | 73.8% | 72.9% | 73.9% | 70.0% | 73.0% | 57.8% | 69.4% | 80.7% |
| Conecuh (AL) | 46.2% | 74.6% | 69.3% | 73.3% | 64.5% | 67.7% | 58.3% | 66.5% | 67.9% |
| Monroe (AL) | 44.4% | 68.2% | 76.3% | 61.2% | 62.7% | 59.3% | 55.6% | 63.0% | 71.2% |
| Clarke (AL) | 45.4% | 70.1% | 69.8% | 67.2% | 58.3% | 67.7% | 50.4% | 73.1% | 79.2% |
| Washington (AL) | 45.3% | 80.9% | 64.1% | 71.0% | 61.4% | 70.8% | 50.1% | 44.1% | 78.9% |
| Greene (MS) | 33.4% | 55.5% | 46.9% | 32.6% | 35.4% | 59.8% | 40.2% | 48.3% | 62.5% |
| George (MS) | 52.5% | 69.8% | 76.6% | 71.2% | 74.1% | 73.1% | 60.7% | 72.3% | 88.9% |
| Jackson (MS) | 60.0% | 80.2% | 86.9% | 79.9% | 77.7% | 79.3% | 70.6% | 77.2% | 85.8% |

Source: 2015–2019 American Community Survey Five-Year Estimates

Within the SARPC Region, both Baldwin and Mobile Counties reflect strong participation rates and closely resemble the State averages in nearly every category. Other communities within the Region that possess strong participation rates include Escambia and Okaloosa Counties, Florida and Jackson County, Mississippi.

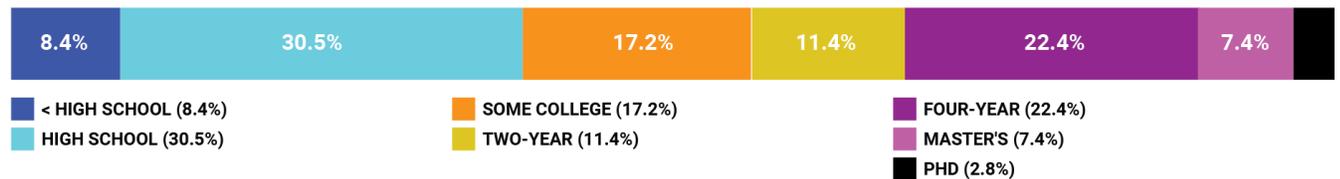
Labor Force Educational Attainment vs. Industry Requirements //

Demand for trained and skilled workers is high and expected to increase as industries adopt new technologies. Jobs are increasingly requiring education or credentials beyond high school. While continuing education varies—a four-year college degree, a two-year degree, a certificate from a community college, or a technical education certificate earned in high school—it not only prepares workers for the tasks required by a job, but also enhances their ability to adapt to new working environments.

When viewing the three Counties' 45-minute drive time separately, the Manufacturing Cluster workforce education level in each county demonstrates a competitive advantage; the Transportation, Distribution, and Logistics Cluster workforce education level, however, presents potential risk for each county when attempting to attract additional industry.

FIGURE 12: EDUCATION LEVEL VS. REQUIREMENTS – SARPC REGION

Educational Attainment



Education and Training Requirements



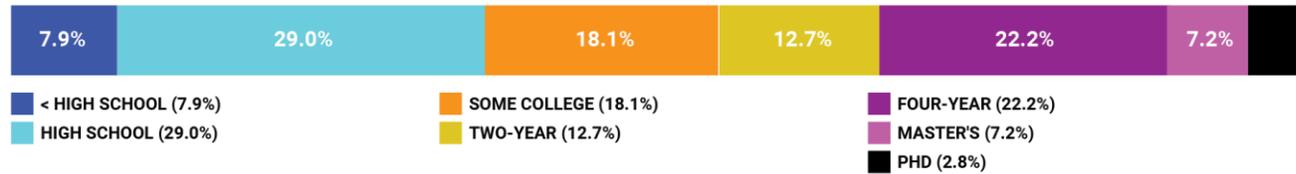
Source: JobsEQ®. Data as of 2021Q1

The data depicted in Figure 12 indicates that 91.6 percent of the labor force in the SARPC Region has at least a high school diploma or equivalent. Additionally, it shows that 30.5 percent of all jobs in the Region require a two-year certificate/degree or higher, compared to 44 percent of the labor force who currently have a two-year certificate/degree or higher.

To understand the state of the current workforce more comprehensively, the forty-five-minute drive time from each county was separately reviewed.

FIGURE 13: EDUCATION LEVEL VS. REQUIREMENTS – BALDWIN COUNTY FORTY-FIVE-MINUTE DRIVE TIME

Educational Attainment



Education and Training Requirements



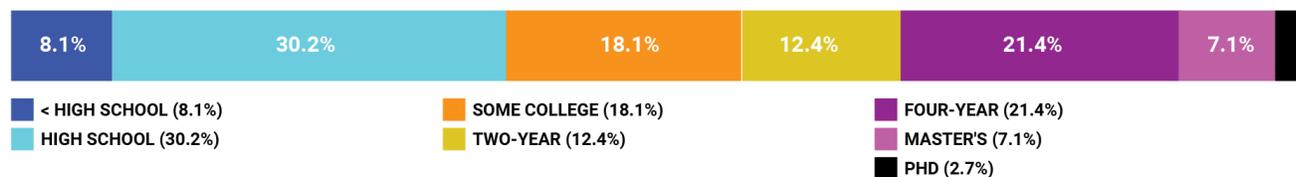
Source: JobsEQ®. Data as of 2021Q1

Across all occupations in Baldwin County, 45.8 percent of jobs require long-term training, compared to 63 percent of the workforce having some college of higher.

In Manufacturing Career and Technical Education (CTE) Cluster occupations, 36.6 percent of jobs in Baldwin County require long-term training, compared to 53.7 percent of the workforce having some college or higher. For Transportation, Distribution, and Logistics CTE Cluster occupations, 40.2 percent of the companies in the Region require long-term training, compared to 41.1 percent of the workforce having some college or higher.

FIGURE 14: EDUCATION LEVEL VS. REQUIREMENTS – ESCAMBIA COUNTY FORTY-FIVE-MINUTE DRIVE TIME

Educational Attainment



Education and Training Requirements



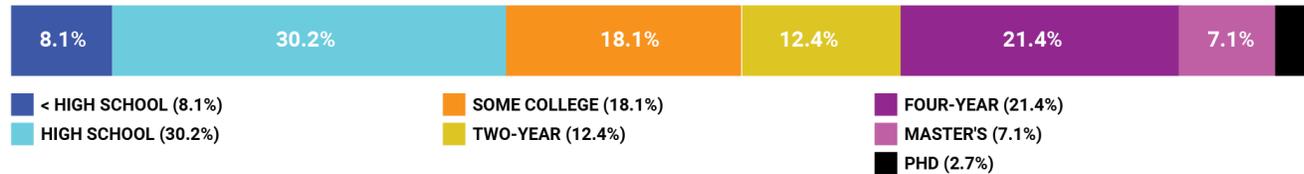
Source: JobsEQ®. Data as of 2021Q1

In Escambia County, 46.5 percent of jobs require long-term training, compared to 61.7 percent of the workforce having some college higher education or training.

Of Manufacturing CTE Cluster jobs in Escambia County, 23 percent require long-term training, compared to 39.8 percent of the workforce having some college or higher. For Transportation, Distribution, and Logistics CTE Cluster occupations in the Region, 47.5 percent require long-term training, compared to 36.8 percent of the workforce having some college or higher.

FIGURE 15: EDUCATION LEVEL VS. REQUIREMENTS – MOBILE COUNTY FORTY-FIVE-MINUTE DRIVE TIME

Educational Attainment



Education and Training Requirements



Source: JobsEQ®. Data as of 2021Q1

Across all occupations in Mobile County, 45.6 percent of jobs require long-term training, compared to 61.7 percent of the workforce having some college or higher.

To further evaluate workforce education level versus employer requirements by industry, 30.2 percent of Manufacturing CTE Cluster jobs in Mobile County require long-term training, compared to 44.7 percent of the workforce having some college or higher. For Transportation, Distribution, and Logistics CTE Cluster occupations, 43.6 percent of the companies in the Region require long-term training, compared to 40.5 percent of the workforce having some college or higher.

Underemployment //

It is important to look at not only the current labor force and their educational attainment (Figures 12–15), but also to explore underemployment (Figures 16–18) within the Region’s labor force. JobsEQ® defines underemployment by adopting the Federal Reserve Bank of New York’s methodology: Underemployed people are those who have acquired at least a bachelor's degree but are working in an occupation where it is not typically required.

The only occupations shown in the underemployment figures on the following pages are "non-college" jobs. A job is classified as a college job if 50 percent or more of the people working in that job indicate that at least a bachelor’s degree is necessary to perform the job; otherwise, the job is classified as a non-college job.

Underemployment Key Takeaways //

- Baldwin County has the second-highest underemployment percentage in the State (46.2 percent), just lower than Shelby County (46.8 percent).
- Mobile County has a 34.4 percent underemployment rate.
- Escambia County has a 26 percent underemployment rate.
- SARPC's Region contains 30,309 employees who are underemployed by place of work, as indicated in Figure 16.
- SARPC's Region contains 1,972 Manufacturing employees who are underemployed by place of work, as indicated in Figure 17.
- The Transportation, Distribution, and Logistics (CTE Cluster) has an unemployment rate of 8.6 percent.

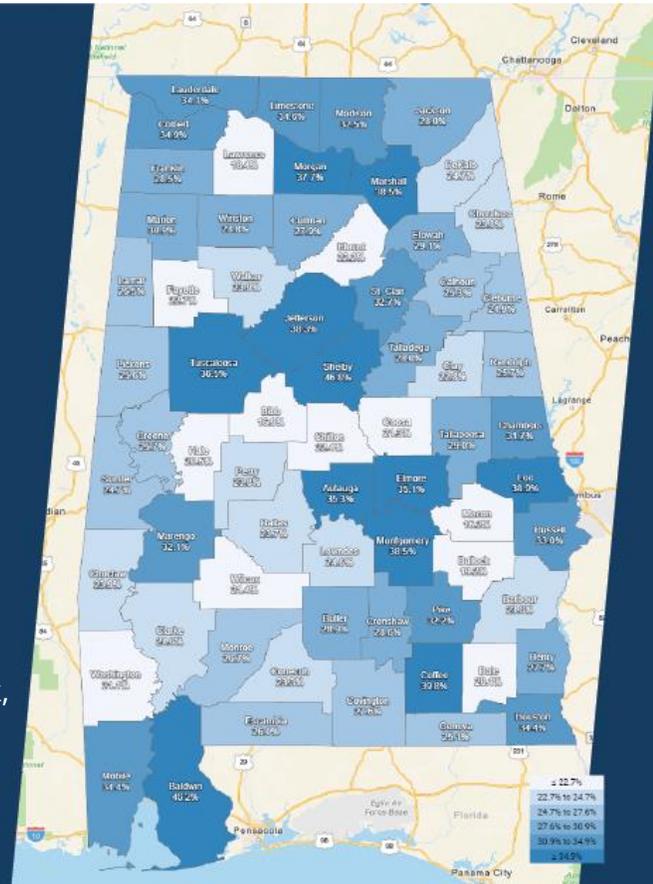


FIGURE 16: UNDEREMPLOYMENT IN ALL OCCUPATIONS

| | | Employed (Place of Work) | | Overall Occupation | | |
|---------|--|--------------------------|----------------|----------------------|--------------------------|-------------------|
| SOC | | Underemployed | Total Employed | Average Annual Wages | Forecasted Annual Growth | Unemployment Rate |
| 43-0000 | Office and Administrative Support Occupations | 6,590 | 33,957 | \$36,500 | -0.5% | 5.9% |
| 41-0000 | Sales and Related Occupations | 5,640 | 30,703 | \$37,300 | -0.1% | 8.4% |
| 35-0000 | Food Preparation and Serving Related Occupations | 2,639 | 26,420 | \$22,500 | 0.9% | 14.8% |
| 11-0000 | Management Occupations | 1,962 | 14,691 | \$96,300 | 0.5% | 3.3% |
| 53-0000 | Transportation and Material Moving Occupations | 1,614 | 23,475 | \$33,300 | 0.1% | 9.0% |
| 33-0000 | Protective Service Occupations | 1,357 | 6,138 | \$37,900 | 0.4% | 4.7% |
| 39-0000 | Personal Care and Service Occupations | 1,247 | 7,468 | \$25,200 | 0.7% | 13.7% |
| 51-0000 | Production Occupations | 1,234 | 17,756 | \$42,800 | -0.8% | 7.8% |

| | | Employed (Place of Work) | | | Overall Occupation | |
|---------|--|--------------------------|----------------|----------------------|--------------------------|-------------------|
| SOC | | Underemployed | Total Employed | Average Annual Wages | Forecasted Annual Growth | Unemployment Rate |
| 29-0000 | Healthcare Practitioners and Technical Occupations | 1,127 | 16,787 | \$72,700 | 0.8% | 2.5% |
| 13-0000 | Business and Financial Operations Occupations | 1,111 | 9,888 | \$67,500 | 0.3% | 3.3% |
| 31-0000 | Healthcare Support Occupations | 1,111 | 10,328 | \$26,400 | 1.8% | 5.5% |
| 49-0000 | Installation, Maintenance, and Repair Occupations | 961 | 13,752 | \$46,800 | 0.2% | 5.8% |
| 47-0000 | Construction and Extraction Occupations | 871 | 15,176 | \$42,500 | 0.3% | 8.2% |
| 37-0000 | Building and Grounds Cleaning and Maintenance Occupations | 778 | 11,026 | \$27,500 | 0.8% | 8.6% |
| 27-0000 | Arts, Design, Entertainment, Sports, and Media Occupations | 770 | 3,733 | \$45,900 | 0.2% | 9.1% |
| 15-0000 | Computer and Mathematical Occupations | 435 | 4,878 | \$75,000 | 1.0% | 2.5% |
| 25-0000 | Educational Instruction and Library Occupations | 273 | 12,426 | \$46,500 | 0.6% | 5.8% |
| 23-0000 | Legal Occupations | 240 | 1,830 | \$84,200 | 0.4% | 2.1% |
| 17-0000 | Architecture and Engineering Occupations | 185 | 4,202 | \$90,500 | -0.1% | 2.7% |
| 45-0000 | Farming, Fishing, and Forestry Occupations | 101 | 1,295 | \$27,200 | 0.2% | 7.6% |
| 19-0000 | Life, Physical, and Social Science Occupations | 65 | 1,318 | \$67,900 | 0.2% | 3.7% |
| | Total – All Occupations | 30,309 | 271,269 | \$44,500 | 0.3% | 7.3% |

Source: JobsEQ®. Only SOC codes with twenty-five or more underemployed workers are presented. Data as of 2021Q1, unless noted otherwise. "Overall occupation" characteristics refer to attributes across all individuals in those occupations, not just those limited to the demographic categories shown in this table.

FIGURE 17: UNDEREMPLOYMENT IN MANUFACTURING (CTE CLUSTER)

| | | Employed (Place of Work) | | Overall Occupation | | |
|---------|---|--------------------------|----------------|----------------------|--------------------------|-------------------|
| SOC | | Underemployed | Total Employed | Average Annual Wages | Forecasted Annual Growth | Unemployment Rate |
| 51-1011 | First-Line Supervisors of Production and Operating Workers | 204 | 1,454 | \$71,100 | -0.5% | 4.2% |
| 49-9071 | Maintenance and Repair Workers, General | 177 | 2,346 | \$34,400 | 0.5% | 6.0% |
| 49-1011 | First-Line Supervisors of Mechanics, Installers, and Repairers | 165 | 1,272 | \$62,700 | 0.2% | 2.9% |
| 51-9061 | Inspectors, Testers, Sorters, Samplers, and Weighers | 138 | 974 | \$48,200 | -2.2% | 6.4% |
| 43-5061 | Production, Planning, and Expediting Clerks | 129 | 462 | \$54,700 | 0.0% | 4.3% |
| 51-9011 | Chemical Equipment Operators and Tenders | 86 | 422 | \$61,300 | -0.6% | 6.0% |
| 49-9041 | Industrial Machinery Mechanics | 73 | 1,647 | \$56,900 | 0.9% | 3.0% |
| 51-2092 | Team Assemblers | 71 | 1,408 | \$33,600 | -2.0% | 11.8% |
| 51-9198 | Helpers – Production Workers | 61 | 1,208 | \$25,100 | 0.0% | 13.0% |
| 19-4031 | Chemical Technicians | 58 | 210 | \$61,800 | -0.5% | 7.3% |
| 49-2011 | Computer, Automated Teller, and Office Machine Repairers | 37 | 176 | \$35,300 | -0.3% | 4.6% |
| 49-9099 | Installation, Maintenance, and Repair Workers, All Other | 30 | 355 | \$38,800 | 0.2% | 7.9% |
| 51-4121 | Welders, Cutters, Solderers, and Brazers | 30 | 1,409 | \$50,600 | -0.5% | 9.0% |
| 17-3013 | Mechanical Drafters | 26 | 107 | \$55,800 | -1.5% | 4.7% |
| 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 25 | 174 | \$64,900 | -0.1% | 4.7% |

| | | Employed (Place of Work) | | | Overall Occupation | |
|---------|---|--------------------------|----------------|----------------------|--------------------------|-------------------|
| SOC | | Underemployed | Total Employed | Average Annual Wages | Forecasted Annual Growth | Unemployment Rate |
| 51-9199 | Production Workers, All Other | 22 | 349 | \$30,700 | -0.2% | 7.6% |
| 51-4023 | Rolling Machine Setters, Operators, and Tenders, Metal and Plastic | 21 | 491 | \$46,200 | -2.0% | 7.5% |
| 51-4041 | Machinists | 19 | 644 | \$49,000 | 0.0% | 6.3% |
| 51-6031 | Sewing Machine Operators | 18 | 254 | \$26,000 | -0.2% | 7.3% |
| 49-2094 | Electrical and Electronics Repairers, Commercial and Industrial Equipment | 18 | 125 | \$67,800 | -0.3% | 6.9% |
| 51-8091 | Chemical Plant and System Operators | 18 | 179 | \$76,300 | -1.0% | 3.2% |
| 51-2099 | Assemblers and Fabricators, All Other | 16 | 305 | \$33,700 | -1.3% | 11.9% |
| 51-8013 | Power Plant Operators | 15 | 114 | \$85,100 | -3.3% | 0.4% |
| 49-2098 | Security and Fire Alarm Systems Installers | 15 | 168 | \$46,200 | 0.9% | 2.9% |
| 51-9161 | Computer Numerically Controlled Tool Operators | 15 | 220 | \$41,100 | -0.8% | 6.9% |
| 49-9062 | Medical Equipment Repairers | 15 | 81 | \$48,200 | 0.4% | 2.2% |
| 95-0140 | Total – Manufacturing (CTE Cluster) | 1,972 | 24,658 | \$45,900 | -0.4% | 6.9% |

Source: JobsEQ®. Only SOC codes with fifteen or more underemployed workers are presented, with the exception of the Manufacturing total. Data as of 2021Q1, unless noted otherwise. "Overall occupation" characteristics refer to attributes across all individuals in those occupations, not just those limited to the demographic categories shown in this table.

FIGURE 18: UNDEREMPLOYMENT IN TRANSPORTATION, DISTRIBUTION, AND LOGISTICS (CTE CLUSTER)

| SOC | | Employed (Place of Work) | | Overall Occupation | | |
|---------|--|--------------------------|-----------------|----------------------|--------------------------|-------------------|
| | | Underemployed | Total Employees | Average Annual Wages | Forecasted Annual Growth | Unemployment Rate |
| 53-7062 | Laborers and Freight, Stock, and Material Movers, Hand | 246 | 4,954 | \$28,300 | 0.1% | 9.4% |
| 53-3032 | Heavy and Tractor-Trailer Truck Drivers | 206 | 3,877 | \$39,900 | 0.0% | 6.2% |
| 53-3058 | Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity | 202 | 1,519 | \$19,600 | 0.3% | 20.9% |
| 53-1047 | First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors | 135 | 966 | \$54,000 | 0.2% | 3.6% |
| 53-3033 | Light Truck Drivers | 112 | 1,960 | \$33,700 | 0.4% | 6.0% |
| 49-3023 | Automotive Service Technicians and Mechanics | 56 | 1,388 | \$40,300 | -0.3% | 5.8% |
| 49-3011 | Aircraft Mechanics and Service Technicians | 50 | 449 | \$60,300 | 0.6% | 4.9% |
| 53-7064 | Packers and Packagers, Hand | 44 | 883 | \$22,800 | -0.8% | 11.7% |
| 43-5032 | Dispatchers, Except Police, Fire, and Ambulance | 42 | 330 | \$38,300 | -0.3% | 3.7% |
| 43-5011 | Cargo and Freight Agents | 39 | 194 | \$40,700 | 0.1% | 12.6% |
| 53-7061 | Cleaners of Vehicles and Equipment | 34 | 806 | \$26,100 | 0.2% | 10.6% |
| 53-7051 | Industrial Truck and Tractor Operators | 32 | 1,197 | \$35,500 | -0.1% | 8.4% |
| 53-5021 | Captains, Mates, and Pilots of Water Vessels | 26 | 158 | \$75,500 | -0.5% | 8.9% |
| 43-5021 | Couriers and Messengers | 26 | 208 | \$30,100 | -0.1% | 6.4% |
| 53-3052 | Bus Drivers, Transit and Intercity | 23 | 287 | \$26,500 | 0.4% | 11.5% |
| 49-3031 | Bus and Truck Mechanics and Diesel Engine Specialists | 17 | 587 | \$45,900 | 0.1% | 3.7% |
| 49-3042 | Mobile Heavy Equipment Mechanics, Except Engines | 16 | 513 | \$47,600 | -0.3% | 4.3% |
| 95-0050 | Total – Transportation, Distribution, and Logistics (CTE Cluster) | 1,488 | 23,672 | \$37,000 | 0.0% | 8.6% |

Source: JobsEQ®. Only SOC codes with fifteen or more underemployed workers are presented, with the exception of the Transportation, Distribution, and Logistics total. Data as of 2021Q1, unless noted otherwise. "Overall occupation" characteristics refer to attributes across all individuals in those occupations, not just those limited to the demographic categories shown in this table.

Turnover Rate //

According to the U.S. Department of Labor, 4.3 million people quit their jobs in August 2021. Several factors lead to higher turnover rates, including an increase in the number of job opportunities in the Region as well as fewer opportunities for promotion within current positions. Stressful jobs, long hours at minimal pay, or a high risk of contracting COVID are among the reasons employees quit their jobs.

In today's economy, jobs are plentiful and people to fill them are scarce. Those in the labor force are finding themselves with an increasing amount of leverage. This amplifies the already difficult situation many employers are facing in finding and keeping qualified employees. Industries across the board are reviewing and evaluating current wages and benefit packages. Achieving low turnover rates often results in reduced bottom-line cost to a company locating in the Region, with less time and resources allocated to screening new hires and training new employees.

Figure 19 shows the regional turnover rates in both Manufacturing and Transportation & Warehousing compared to statewide turnover rates, breaking them down by gender, educational attainment, and wages. Turnover is calculated by taking the average of new hires and separations and dividing by full-quarter employment. The Stable Jobs column presents the average earnings of employees who worked with the same firm throughout the quarter, while the New Stable Jobs column presents the average earning of new employees who were hired within a company in the previous quarter.

Turnover Rate Key Takeaways

- The highest turnover rates are among workers with less than a high school degree.
- On average, males earn \$20,000 more than females with the same education level in Manufacturing and \$15,000 more in Transportation & Warehousing.
- More than four times as many males as females are employed in Manufacturing, and three times as many in Transportation & Warehousing.
- The categories with the highest employment numbers in Manufacturing are males with a high school education and no college (6,949) and males with some college or an associate degree (5,993). These categories also have the lowest turnover rates, at 4.9 percent and 4.8 percent, respectively.
- The categories with the highest employment numbers in Transportation & Warehousing are males with high school or equivalent, no college (2,891) and males with some college or an associate degree (2,537). The categories with the lowest turnover rates, however, are females with a bachelor's degree or advanced degree (6.3 percent) and females with some college or an associate degree (6.9 percent).

FIGURE 19: TURNOVER RATES IN MANUFACTURING AND TRANSPORTATION & WAREHOUSING

| Industry | Education | Gender | Employment | Stable Jobs | New Stable Jobs | SARPC Turnover | Alabama Turnover |
|---------------|---------------------------------------|--------|------------|-------------|-----------------|----------------|------------------|
| Manufacturing | Less than high school | Male | 2,763 | \$57,063 | \$43,782 | 6.3% | 6.8% |
| Manufacturing | Less than high school | Female | 686 | \$38,513 | \$30,799 | 8.1% | 7.9% |
| Manufacturing | High school or equivalent, no college | Male | 6,949 | \$64,270 | \$45,925 | 4.9% | 5.3% |
| Manufacturing | High school or equivalent, no college | Female | 1,425 | \$43,936 | \$33,251 | 5.9% | 6.2% |
| Manufacturing | Some college or associate degree | Male | 5,993 | \$69,953 | \$50,447 | 4.8% | 5.3% |
| Manufacturing | Some college or associate degree | Female | 1,580 | \$47,219 | \$35,279 | 5.9% | 6.3% |
| Manufacturing | Bachelor's degree or advanced degree | Male | 3,403 | \$84,923 | \$63,363 | 4.7% | 5.4% |
| Manufacturing | Bachelor's degree or advanced degree | Female | 935 | \$57,349 | \$41,380 | 6.0% | 6.5% |

| Industry | Education | Gender | Employment | Stable Jobs | New Stable Jobs | SARPC Turnover | Alabama Turnover |
|---|---|--------|----------------|-----------------|-----------------|----------------|------------------|
| Manufacturing | Educational attainment not available (workers aged 24 or younger) | Male | 1,318 | \$40,518 | \$33,598 | 16.3% | 17.0% |
| Manufacturing | Educational attainment not available (workers aged 24 or younger) | Female | 364 | \$28,892 | \$25,922 | 17.8% | 19.6% |
| Total – Manufacturing | | | 24,961 | \$62,073 | \$43,455 | 5.9% | 6.6% |
| Transportation and Warehousing | Less than high school | Male | 1,212 | \$50,041 | \$37,985 | 9.3% | 10.3% |
| Transportation and Warehousing | Less than high school | Female | 418 | \$33,777 | \$24,421 | 8.8% | 10.0% |
| Transportation and Warehousing | High school or equivalent, no college | Male | 2,891 | \$54,507 | \$40,929 | 7.3% | 8.7% |
| Transportation and Warehousing | High school or equivalent, no college | Female | 946 | \$34,710 | \$25,925 | 7.0% | 8.0% |
| Transportation and Warehousing | Some college or associate degree | Male | 2,537 | \$57,225 | \$41,249 | 7.4% | 8.5% |
| Transportation and Warehousing | Some college or associate degree | Female | 998 | \$38,656 | \$28,585 | 6.9% | 7.8% |
| Transportation and Warehousing | Bachelor's degree or advanced degree | Male | 1,240 | \$65,230 | \$42,639 | 7.1% | 8.4% |
| Transportation and Warehousing | Bachelor's degree or advanced degree | Female | 604 | \$46,616 | \$37,660 | 6.3% | 7.0% |
| Transportation and Warehousing | Educational attainment not available (workers aged 24 or younger) | Male | 719 | \$32,569 | \$26,788 | 19.3% | 21.0% |
| Transportation and Warehousing | Educational attainment not available (workers aged 24 or younger) | Female | 289 | \$27,309 | \$24,395 | 21.4% | 21.5% |
| Total – Transportation and Warehousing | | | 11,855 | \$49,810 | \$35,918 | 8.4% | 9.5% |
| Total – All Industries | | | 261,469 | \$45,496 | \$28,561 | 10.4% | 9.7% |

Data is for the four quarters ending 2020Q1. Demographic details for NAICS 4851, 4911, 485, and 491 may be skewed due to limited source data availability. Total industry figures do not reflect employment in non-classifiable industries (NAICS 9999). Employment indicates covered employment only. Employment for aggregate regions is summarized from County-level data; due to data availability, it may not match employment as shown elsewhere in JobsEQ®.

Commuting Patterns //

The commuting patterns in the SARPC Region demonstrate a strong regional labor draw and high willingness by employees to travel across county lines for competitive job opportunities.

Site selectors and business decision-makers understand that labor markets do not stop at county lines. Workers commute within counties and across county lines. The county “Worker Inflow and Outflow” reports underscores where workers are going, where they are coming from, and the workforce relationship with other counties.

Commuting times and patterns for each county demonstrate a larger workforce market for the Region to pull from for potential projects. However, looking at commuting patterns highlights the sum of all occupations only communicates part of the story. To understand the manufacturing and transportation, logistics and distribution workforce base, commuting patterns and occupations by place of residence and place of work were examined. Additional large-scale employers or expansions with high wages could increase the inflow numbers or decrease the outflow substantially.

FIGURE 20: INBOUND AND OUTBOUND COMMUTING PATTERNS

| | Live in Another County and Commute to County | | Live and Work in County | | Live in County and Commute to Another County |
|--|--|---|-------------------------|---|--|
| | Baldwin County | | | | |
| All Occupations | 9,343 | » | 71,600 | » | 28,566 |
| Manufacturing (CTE Cluster) Occupations | 665 | » | 4,366 | » | 2,389 |
| Transportation, Logistics & Distribution (CTE Cluster) Occupations | 782 | » | 4,580 | » | 2,097 |
| | Escambia County | | | | |
| All Occupations | 3,487 | » | 9,677 | » | 2,721 |
| Manufacturing (CTE Cluster) Occupations | 322 | » | 1,334 | » | 354 |
| Transportation, Logistics & Distribution (CTE Cluster) Occupations | 181 | » | 779 | » | 326 |
| | Mobile County | | | | |
| All Occupations | 29,051 | » | 147,555 | » | 14,958 |
| Manufacturing (CTE Cluster) Occupations | 2,951 | » | 14,699 | » | 1,656 |
| Transportation, Logistics & Distribution (CTE Cluster) Occupations | 2,673 | » | 14,348 | » | 1,231 |

The JobsEQ® model uses a combination of data from Longitudinal Employer-Household Dynamics Origin-Destination Employment Statistics and the American Community Survey to calculate the number of workers per region for the "commuting to" and "commuting from" classifications. In some cases, longer-range commuting patterns do not necessarily indicate "regular" commuting patterns, since data from the American Community Survey can include a significant percentage of temporary and/or transitional arrangements.

Building the Talent Pipeline: Certificates & Degrees //

Educational attainment and training play a critical role in evaluating a community or region. Regions must demonstrate not only an existing workforce, but also a sustainable talent pipeline. The SARPC Regional Laborshed (outlined in the table below) has a strong regional talent pipeline, with numerous higher education institutions, awarding nearly twenty-five thousand certificates and degrees annually in high-demand technical fields such as welding, machining, and electrical as well as professional degrees in accounting, finance, and information technology.

| SARPC Regional Laborshed | |
|-----------------------------|----------------------------|
| Conecuh County, Alabama | Escambia County, Florida |
| Monroe County, Alabama | Washington County, Alabama |
| George County, Mississippi | Greene County, Mississippi |
| Covington County, Alabama | Mobile County, Alabama |
| Escambia County, Alabama | Okaloosa County, Florida |
| Santa Rosa County, Florida | Clarke County, Alabama |
| Jackson County, Mississippi | Baldwin County, Alabama |

A broader look at educational attainment was conducted utilizing the SARPC Regional Laborshed because according to research conducted at a national level by the Wall Street Journal and EMSI approximately half of graduates stay in the metropolitan area from which they graduate. Utilizing the data from the charts on the following pages, the EDOs can strengthen messaging to targets and assist employers in finding candidates for positions within the SARPC Regional Laborshed pipeline.

For example, when looking at the data more closely as compared to targeted industries, more than 900 Manufacturing degrees and certificates and more than 3,500 Transportation, Distribution, and Logistics degrees and certificates are awarded within the SARPC Regional Laborshed annually. This is a significant selling point for the SARPC Region. The yearly awards indicate an abundance of emerging talent throughout the laborshed.

In addition, each of the three county school districts have placed an emphasis on career and technical training at the K-12 level, preparing students for the jobs of today and tomorrow. With more than 50,000 students district-wide, Mobile's public schools recognize that learning is not a one-size-fits-all approach. The district has created high school career 16 career academies that offer students pathways in engineering, aerospace and aviation, computer science, coastal science, entrepreneurship, business leadership, and more.

Escambia County's Career Readiness Center offers nine fields of study including information technology, building construction, industrial maintenance, welding and more.

Career Technical Education is offered in all eight high schools as elective courses, at two technical centers and is offered in all middle schools in Baldwin County. In addition, the Baldwin County Public School System, Coastal Alabama Community College and the Fairhope Airport Authority have partnered together to offer all high school students and adults courses in Airframe Technology, Electrical & Instrumentation, and Welding. The Academy at the Fairhope Airport provides the critical training needed to supply local business and industry with a skilled workforce.

Note that while the analytic tool shows the awards in the SARPC Regional Laborshed specified, some postsecondary institutions with branches report all their data through only the institution’s main campus. Therefore, if any additional branch grants awards within the SARPC Regional Laborshed, the data will not be reported when a site selector or business decision-maker reviews this data online.

FIGURE 21: ALL PROGRAM CERTIFICATES AND DEGREES BY SCHOOL – SARPC REGIONAL LABORSHED

| Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards | Total School Enrollment | Average Net Price |
|--------------------------------------|---------------------|-----------------------|------------------|-----------------------|------------|--------------------|----------|---------------|-----------|--------------|-------------------------|-------------------|
| Columbia Southern University | 155 | 0 | 1,917 | 0 | 3,424 | 56 | 1,953 | 0 | 12 | 7,517 | 20,034 | \$10,951 |
| The University of West Florida | 0 | 0 | 870 | 0 | 2,450 | 0 | 997 | 96 | 9 | 4,422 | 12,557 | \$7,515 |
| University of South Alabama | 74 | 15 | 0 | 0 | 2,159 | 0 | 1,057 | 137 | 322 | 3,764 | 14,397 | \$13,624 |
| Pensacola State College | 397 | 229 | 1,839 | 0 | 241 | 0 | 0 | 0 | 0 | 2,706 | 9,713 | \$3,518 |
| Northwest Florida State College | 237 | 55 | 976 | 0 | 140 | 0 | 0 | 0 | 0 | 1,408 | 5,025 | \$6,995 |
| Coastal Alabama Community College | 158 | 143 | 798 | 0 | 0 | 0 | 0 | 0 | 0 | 1,099 | 7,535 | \$9,324 |
| Bishop State Community College | 227 | 149 | 342 | 0 | 0 | 0 | 0 | 0 | 0 | 718 | 2,846 | \$5,735 |
| Lurleen B. Wallace Community College | 178 | 57 | 291 | 0 | 0 | 0 | 0 | 0 | 0 | 526 | 1,767 | \$8,127 |
| George Stone Technical College | 196 | 149 | 0 | 8 | 0 | 0 | 0 | 0 | 0 | 353 | 699 | \$9,054 |
| Spring Hill College | 1 | 0 | 0 | 0 | 296 | 17 | 36 | 0 | 0 | 350 | 1,290 | \$22,362 |
| University of Mobile | 0 | 0 | 5 | 0 | 288 | 0 | 57 | 0 | 0 | 350 | 1,989 | \$21,847 |
| Fortis College | 0 | 244 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 244 | 434 | \$17,564 |
| Okaloosa Technical College | 89 | 154 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 243 | 499 | \$11,281 |
| Fortis Institute – Pensacola | 6 | 155 | 70 | 0 | 0 | 0 | 0 | 0 | 0 | 231 | 608 | \$19,297 |

| Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards | Total School Enrollment | Average Net Price |
|--|---------------------|-----------------------|------------------|-----------------------|--------------|--------------------|--------------|---------------|------------|---------------|-------------------------|-------------------|
| Radford M. Locklin Technical College | 50 | 105 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 158 | 572 | \$8,830 |
| Remington College – Mobile Campus | 26 | 96 | 29 | 0 | 0 | 0 | 0 | 0 | 0 | 151 | 306 | \$19,973 |
| Reid State Technical College | 16 | 93 | 36 | 0 | 0 | 0 | 0 | 0 | 0 | 145 | 489 | \$2,918 |
| Fortis College – Foley | 0 | 63 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 63 | 125 | \$14,900 |
| United States Sports Academy | 0 | 0 | 0 | 0 | 19 | 0 | 34 | 0 | 10 | 63 | 499 | |
| Cardiac and Vascular Institute of Ultrasound | 0 | 32 | 0 | 15 | 0 | 0 | 0 | 0 | 0 | 47 | 49 | |
| Florida Institute of Ultrasound, Inc. | 0 | 0 | 0 | 33 | 0 | 0 | 0 | 0 | 0 | 33 | 49 | |
| Blue Cliff Career College | 5 | 22 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 27 | 64 | \$12,196 |
| Total | 1,815 | 1,761 | 7,173 | 59 | 9,017 | 73 | 4,134 | 233 | 353 | 24,618 | | |

Data as of the 2019-2020 academic year except Average Net Price data, which is as of the 2017-2018 academic year.

FIGURE 22: CERTIFICATES AND DEGREES IN MANUFACTURING (CTE CLUSTER) PROGRAMS – SARPC REGIONAL LABORSHED

| CIP Code | Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards |
|----------|--|---------------------|-----------------------|------------------|-----------------------|------------|--------------------|----------|---------------|-----------|--------------|
| 48.0508 | Welding Technology / Welder. | 166 | 88 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 254 |
| 47.0105 | Industrial Electronics Technology / Technician. | 37 | 0 | 52 | 0 | 0 | 0 | 0 | 0 | 0 | 89 |
| 46.0302 | Electrician. | 0 | 78 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 81 |
| 15.0612 | Industrial Technology / Technician. | 21 | 0 | 57 | 0 | 0 | 0 | 0 | 0 | 0 | 78 |
| 15.0501 | Heating, Ventilation, Air Conditioning, and Refrigeration Engineering Technology / Technician. | 30 | 23 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 53 |
| 15.0000 | Engineering Technologies / Technicians, General. | 11 | 0 | 9 | 0 | 32 | 0 | 0 | 0 | 0 | 52 |
| 15.1301 | Drafting and Design Technology / Technician, General. | 19 | 11 | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 42 |

| CIP Code | Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards |
|----------|---|---------------------|-----------------------|------------------|-----------------------|------------|--------------------|----------|---------------|-----------|--------------|
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology / Technician. | 0 | 26 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 33 |
| 15.1202 | Computer / Computer Systems Technology / Technician. | 31 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 31 |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 0 | 0 | 0 | 0 | 26 | 0 | 0 | 0 | 0 | 26 |
| 47.0603 | Autobody / Collision and Repair Technology / Technician. | 16 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 24 |
| 40.0501 | Chemistry, General. | 0 | 0 | 0 | 0 | 24 | 0 | 0 | 0 | 0 | 24 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 13 | 1 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 22 |
| 15.0404 | Instrumentation Technology / Technician. | 0 | 0 | 22 | 0 | 0 | 0 | 0 | 0 | 0 | 22 |
| 15.0805 | Mechanical / Mechanical Engineering Technology / Technician. | 15 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 15 |
| 47.0608 | Aircraft Powerplant Technology / Technician. | 2 | 10 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 14 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 |
| 48.0510 | Computer Numerically Controlled (CNC) Machinist Technology / CNC Machinist. | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 |
| 15.0699 | Industrial Production Technologies / Technicians, Other. | 0 | 0 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 7 |
| 15.1703 | Solar Energy Technology / Technician. | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7 |
| 47.0104 | Computer Installation and Repair Technology / Technician. | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 |
| 10.0399 | Graphic Communications, Other. | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 5 |
| 48.0703 | Cabinetmaking and Millwork. | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 |
| 15.1201 | Computer Engineering Technology / Technician. | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |

| CIP Code | Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards |
|----------|---|---------------------|-----------------------|------------------|-----------------------|------------|--------------------|----------|---------------|-----------|--------------|
| 15.0405 | Robotics Technology / Technician. | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 52.0205 | Operations Management and Supervision. | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 15.0406 | Automation Engineer Technology / Technician. | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 15.1302 | CAD/CADD Drafting and / or Design Technology / Technician. | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 15.0613 | Manufacturing Engineering Technology / Technician. | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 14.2701 | Systems Engineering. | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 |
| 15.0801 | Aeronautical / Aerospace Engineering Technology / Technician. | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Total | 404 | 245 | 188 | 3 | 82 | 0 | 0 | 0 | 1 | 923 |

Source: JobsEQ®. All data as of the 2019-2020 academic year, except related occupation data which is as of 2021Q1, and wages, which are as of 2020. Occupation demand data reflect annual average rates from the ten-year forecast.

FIGURE 23: CERTIFICATES AND DEGREES IN TRANSPORTATION, DISTRIBUTION, AND LOGISTICS (CTE CLUSTER) PROGRAMS – SARPC REGIONAL LABORSHED

| CIP Code | Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards |
|----------|---|---------------------|-----------------------|------------------|-----------------------|------------|--------------------|----------|---------------|-----------|--------------|
| 52.0201 | Business Administration and Management, General | 50 | 0 | 430 | 0 | 1,157 | 0 | 1,166 | 0 | 24 | 2,827 |
| 49.0205 | Truck and Bus Driver/Commercial Vehicle Operator and Instructor | 187 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 187 |
| 44.0401 | Public Administration | 0 | 0 | 0 | 0 | 0 | 6 | 136 | 0 | 0 | 142 |
| 47.0604 | Automobile/Automotive Mechanics Technology/Technician | 28 | 50 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 83 |
| 46.0302 | Electrician | 0 | 78 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 81 |
| 52.0101 | Business/Commerce, General | 6 | 0 | 0 | 0 | 59 | 0 | 0 | 0 | 0 | 65 |

| CIP Code | Title | <1 Year Certificate | 1-<2 Year Certificate | Associate Degree | 2-<4 Year Certificate | Bachelor's | Post-Baccalaureate | Master's | Post-Master's | Doctorate | Total Awards |
|----------|---|---------------------|-----------------------|------------------|-----------------------|--------------|--------------------|--------------|---------------|-----------|--------------|
| 52.0203 | Logistics, Materials, and Supply Chain Management | 0 | 0 | 0 | 0 | 35 | 6 | 20 | 0 | 0 | 61 |
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology/Technician | 0 | 26 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 33 |
| 47.0605 | Diesel Mechanics Technology/Technician | 10 | 13 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 25 |
| 47.0603 | Autobody/Collision and Repair Technology/Technician | 16 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 24 |
| 47.0616 | Marine Maintenance/Fitter and Ship Repair Technology/Technician | 0 | 16 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 16 |
| 47.0608 | Aircraft Powerplant Technology/Technician | 2 | 10 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 14 |
| 47.0606 | Small Engine Mechanics and Repair Technology/Technician | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 |
| 47.0609 | Avionics Maintenance Technology/Technician | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 52.0205 | Operations Management and Supervision | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| | Total | 311 | 201 | 445 | 8 | 1,251 | 12 | 1,322 | 0 | 24 | 3,574 |

Source: JobsEQ®. All data as of the 2019-2020 academic year, except related occupation data which is as of 2021Q1, and wages, which are as of 2020. Occupation demand data reflect annual average rates from the ten-year forecast.

Education Programs to Occupations Crosswalk »

The Classification of Instructional Programs (CIP) SOC Crosswalk is a joint effort by the Bureau of Labor Statistics and the National Center for Education Statistics (NCES) that matches six-digit CIP Codes from the 2020 Classification of Instructional Programs (CIP) with six-digit detailed descriptions from the 2018 Standard Occupational Classification (SOC). The crosswalk is designed to match postsecondary programs of study that provide graduates with specific skills and knowledge to occupations requiring those skills or knowledge to be successful.

For several reasons, the data must be treated with care, especially when making comparisons to occupation demand. While the data shows the awards in the SARPC Regional Laborshed, some postsecondary institutions with branches report all their data through only one branch. A branch within the SARPC Regional Laborshed may grant awards without reporting data in a specific sub-region, and awards may be reported for a school in the Laborshed that were granted in a branch location elsewhere.

In addition, the program-occupation pairs form a complex web, making it difficult to view a direct relationship between a specific training program and a single occupation. The

program-occupation pairs provided by the NCES, while detailed, are incomplete—especially in terms of rare and nontraditional training routes.

Data represents awards, not students. A student with a double major will count as two awards in this data set, and if one student earns several awards at different levels (two-year, four-year, then postgraduate), each award will be reported.

Finally, note that students do not necessarily reside and work in the same region in which they receive an education.

The following data is presented in Figures 24–26:

- **Annual Separation Demand** – The projected minimum demand due to separations such as retirements and transitions into a different occupation.
- **Total Annual Demand** – Annual average occupation demand due to separation demand plus growth. Growth estimates are based on the current occupation employment and the ten-year occupation demand.
- *Total annual demand may be less than total annual separation due to automation and robotics.*

FIGURE 24: MANUFACTURING (CTE CLUSTER) CIP SOC CROSSWALK – SARPC REGIONAL LABORSHED

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|--|--------------------------|---------------------|-----------|---------------|----------------|
| 15.0801 | Aeronautical / Aerospace Engineering Technology / Technician. | 17-3021 | Aerospace Engineering and Operations Technologists and Technicians | 12 | 12 | 115 | \$77,700 | 4 |
| 15.0801 | Aeronautical / Aerospace Engineering Technology / Technician. | 17-3013 | Mechanical Drafters | 31 | 27 | 322 | \$64,900 | 40 |
| 47.0608 | Aircraft Powerplant Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 47.0608 | Aircraft Powerplant Technology / Technician. | 49-3011 | Aircraft Mechanics and Service Technicians | 83 | 92 | 975 | \$66,800 | 70 |
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology / Technician. | 49-3011 | Aircraft Mechanics and Service Technicians | 83 | 92 | 975 | \$66,800 | 70 |
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 13-1032 | Insurance Appraisers, Auto Damage | 3 | 3 | 39 | \$63,600 | 7 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 49-3021 | Automotive Body and Related Repairers | 85 | 90 | 866 | \$51,200 | 32 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 51-9124 | Coating, Painting, and Spraying Machine Setters, Operators, and Tenders | 106 | 101 | 997 | \$47,200 | 45 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 49-3022 | Automotive Glass Installers and Repairers | 14 | 15 | 149 | \$37,600 | 8 |
| 15.0406 | Automation Engineer Technology / Technician. | 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 48 | 49 | 490 | \$68,500 | 40 |
| 15.0406 | Automation Engineer Technology / Technician. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 15.0406 | Automation Engineer Technology / Technician. | 17-3027 | Mechanical Engineering Technologists and Technicians | 13 | 13 | 129 | \$61,200 | |
| 47.0609 | Avionics Maintenance Technology / Technician. | 17-3021 | Aerospace Engineering and Operations Technologists and Technicians | 12 | 12 | 115 | \$77,700 | 4 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 49-2091 | Avionics Technicians | 17 | 18 | 222 | \$66,700 | 40 |
| 48.0703 | Cabinetmaking and Millwork. | 51-7032 | Patternmakers, Wood | 0 | 0 | 3 | \$58,900 | |
| 48.0703 | Cabinetmaking and Millwork. | 51-7099 | Woodworkers, All Other | 5 | 5 | 44 | \$44,100 | |
| 48.0703 | Cabinetmaking and Millwork. | 51-7041 | Sawing Machine Setters, Operators, and Tenders, Wood | 56 | 51 | 508 | \$31,000 | 2 |
| 48.0703 | Cabinetmaking and Millwork. | 51-7042 | Woodworking Machine Setters, Operators, and Tenders, Except Sawing | 52 | 51 | 376 | \$31,000 | 2 |
| 48.0703 | Cabinetmaking and Millwork. | 51-7031 | Model Makers, Wood | 1 | 1 | 5 | \$59,600 | |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|---|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 48.0703 | Cabinetmaking and Millwork. | 51-7011 | Cabinetmakers and Bench Carpenters | 33 | 33 | 314 | \$34,100 | 10 |
| 15.1302 | CAD/CADD Drafting and/or Design Technology / Technician. | 17-3013 | Mechanical Drafters | 31 | 27 | 322 | \$64,900 | 40 |
| 15.1302 | CAD/CADD Drafting and/or Design Technology / Technician. | 17-3019 | Drafters, All Other | 7 | 7 | 63 | \$49,200 | |
| 15.1302 | CAD/CADD Drafting and/or Design Technology / Technician. | 17-3011 | Architectural and Civil Drafters | 48 | 48 | 464 | \$48,800 | 37 |
| 15.1302 | CAD/CADD Drafting and/or Design Technology / Technician. | 17-3012 | Electrical and Electronics Drafters | 12 | 11 | 113 | \$54,100 | 2 |
| 40.0501 | Chemistry, General. | 25-2031 | Secondary School Teachers, Except Special and Career / Technical Education | 299 | 328 | 4,140 | \$57,900 | 45 |
| 40.0501 | Chemistry, General. | 19-2031 | Chemists | 22 | 23 | 239 | \$76,600 | 3 |
| 40.0501 | Chemistry, General. | 19-4013 | Food Science Technicians | 4 | 4 | 32 | \$39,800 | 5 |
| 40.0501 | Chemistry, General. | 11-9121 | Natural Sciences Managers | 13 | 14 | 145 | \$91,800 | 24 |
| 40.0501 | Chemistry, General. | 25-1052 | Chemistry Teachers, Postsecondary | 4 | 4 | 50 | \$86,900 | |
| 40.0501 | Chemistry, General. | 19-4092 | Forensic Science Technicians | 10 | 11 | 75 | \$52,600 | 1 |
| 40.0501 | Chemistry, General. | 19-4031 | Chemical Technicians | 42 | 41 | 430 | \$60,700 | 4 |
| 15.1201 | Computer Engineering Technology / Technician. | 15-1256 | Software Developers and Software Quality Assurance Analysts and Testers | 281 | 369 | 3,578 | \$92,600 | 231 |
| 15.1201 | Computer Engineering Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 15.1201 | Computer Engineering Technology / Technician. | 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 48 | 49 | 490 | \$68,500 | 40 |
| 47.0104 | Computer Installation and Repair Technology / Technician. | 49-2011 | Computer, Automated Teller, and Office Machine Repairers | 37 | 38 | 350 | \$38,800 | 3 |
| 47.0104 | Computer Installation and Repair Technology / Technician. | 49-2094 | Electrical and Electronics | 27 | 27 | 307 | \$63,200 | 19 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|---|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| | | | Repairers, Commercial and Industrial Equipment | | | | | |
| 48.0510 | Computer Numerically Controlled (CNC) Machinist Technology / CNC Machinist. | 51-9161 | Computer Numerically Controlled Tool Operators | 45 | 42 | 449 | \$40,700 | 4 |
| 48.0510 | Computer Numerically Controlled (CNC) Machinist Technology / CNC Machinist. | 51-9162 | Computer Numerically Controlled Tool Programmers | 8 | 10 | 73 | \$57,900 | 1 |
| 15.1202 | Computer/Computer Systems Technology / Technician. | 49-2011 | Computer, Automated Teller, and Office Machine Repairers | 37 | 38 | 350 | \$38,800 | 3 |
| 15.1202 | Computer/Computer Systems Technology / Technician. | 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 48 | 49 | 490 | \$68,500 | 40 |
| 15.1202 | Computer/Computer Systems Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 15.1202 | Computer/Computer Systems Technology / Technician. | 15-1256 | Software Developers and Software Quality Assurance Analysts and Testers | 281 | 369 | 3,578 | \$92,600 | 231 |
| 15.1301 | Drafting and Design Technology / Technician, General. | 17-3011 | Architectural and Civil Drafters | 48 | 48 | 464 | \$48,800 | 37 |
| 15.1301 | Drafting and Design Technology / Technician, General. | 17-3019 | Drafters, All Other | 7 | 7 | 63 | \$49,200 | |
| 15.1301 | Drafting and Design Technology / Technician, General. | 17-3013 | Mechanical Drafters | 31 | 27 | 322 | \$64,900 | 40 |
| 15.1301 | Drafting and Design Technology / Technician, General. | 17-3012 | Electrical and Electronics Drafters | 12 | 11 | 113 | \$54,100 | 2 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 49-2094 | Electrical and Electronics Repairers, Commercial and Industrial Equipment | 27 | 27 | 307 | \$63,200 | 19 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 49-2095 | Electrical and Electronics Repairers, Powerhouse, | 16 | 16 | 181 | \$81,200 | 1 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|---|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| | | | Substation, and Relay | | | | | |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 48 | 49 | 490 | \$68,500 | 40 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 17-3012 | Electrical and Electronics Drafters | 12 | 11 | 113 | \$54,100 | 2 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 51-2028 | Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers | 56 | 58 | 478 | \$34,200 | 14 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 49-2022 | Telecommunications Equipment Installers and Repairers, Except Line Installers | 107 | 106 | 972 | \$59,700 | 115 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 17-3021 | Aerospace Engineering and Operations Technologists and Technicians | 12 | 12 | 115 | \$77,700 | 4 |
| 15.0303 | Electrical, Electronic, and Communications Engineering Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 46.0302 | Electrician. | 47-2111 | Electricians | 457 | 482 | 3,833 | \$49,300 | 98 |
| 46.0302 | Electrician. | 47-1011 | First-Line Supervisors of Construction Trades and Extraction Workers | 429 | 447 | 4,046 | \$60,800 | 198 |
| 46.0302 | Electrician. | 49-9097 | Signal and Track Switch Repairers | 2 | 2 | 23 | \$67,300 | |
| 46.0302 | Electrician. | 49-2098 | Security and Fire Alarm Systems Installers | 43 | 47 | 337 | \$42,300 | 30 |
| 15.0000 | Engineering Technologies / Technicians, General. | 17-3023 | Electrical and Electronic | 48 | 49 | 490 | \$68,500 | 40 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|---|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| | | | Engineering Technologists and Technicians | | | | | |
| 15.0000 | Engineering Technologies / Technicians, General. | 17-3022 | Civil Engineering Technologists and Technicians | 40 | 42 | 405 | \$47,900 | 5 |
| 15.0000 | Engineering Technologies / Technicians, General. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 15.0000 | Engineering Technologies / Technicians, General. | 17-3021 | Aerospace Engineering and Operations Technologists and Technicians | 12 | 12 | 115 | \$77,700 | 4 |
| 15.0000 | Engineering Technologies / Technicians, General. | 17-2199 | Engineers, All Other | 53 | 55 | 753 | \$113,900 | 8 |
| 15.0000 | Engineering Technologies / Technicians, General. | 11-9041 | Architectural and Engineering Managers | 49 | 51 | 667 | \$145,000 | 167 |
| 10.0399 | Graphic Communications, Other. | 51-5111 | Prepress Technicians and Workers | 5 | 5 | 46 | \$36,600 | |
| 10.0399 | Graphic Communications, Other. | 51-9194 | Etchers and Engravers | 4 | 4 | 36 | \$35,000 | 2 |
| 10.0399 | Graphic Communications, Other. | 51-5112 | Printing Press Operators | 38 | 34 | 370 | \$32,700 | 8 |
| 15.0501 | Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology / Technician. | 49-9021 | Heating, Air Conditioning, and Refrigeration Mechanics and Installers | 226 | 242 | 2,267 | \$43,000 | 138 |
| 15.0501 | Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 47.0105 | Industrial Electronics Technology / Technician. | 51-9141 | Semiconductor Processing Technicians | 2 | 2 | 20 | \$43,600 | |
| 47.0105 | Industrial Electronics Technology / Technician. | 49-2094 | Electrical and Electronics Repairers, Commercial and Industrial Equipment | 27 | 27 | 307 | \$63,200 | 19 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9081 | Wind Turbine Service Technicians | 5 | 7 | 33 | \$53,100 | |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|---|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9043 | Maintenance Workers, Machinery | 25 | 25 | 268 | \$42,100 | 1 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9012 | Control and Valve Installers and Repairers, Except Mechanical Door | 23 | 22 | 280 | \$43,200 | 1 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9041 | Industrial Machinery Mechanics | 267 | 295 | 2,802 | \$58,800 | 12 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9044 | Millwrights | 23 | 24 | 269 | \$51,300 | 19 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 47-4021 | Elevator and Escalator Installers and Repairers | 17 | 18 | 145 | \$76,000 | 2 |
| 47.0303 | Industrial Mechanics and Maintenance Technology / Technician. | 49-9045 | Refractory Materials Repairers, Except Brickmasons | 1 | 1 | 10 | \$52,800 | 4 |
| 15.0699 | Industrial Production Technologies / Technicians, Other. | 17-3026 | Industrial Engineering Technologists and Technicians | 21 | 20 | 213 | \$67,400 | 16 |
| 15.0612 | Industrial Technology / Technician. | 17-3026 | Industrial Engineering Technologists and Technicians | 21 | 20 | 213 | \$67,400 | 16 |
| 15.0404 | Instrumentation Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 15.0404 | Instrumentation Technology / Technician. | 49-9069 | Precision Instrument and Equipment Repairers, All Other | 4 | 4 | 40 | \$56,100 | |
| 15.0404 | Instrumentation Technology / Technician. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 15.0613 | Manufacturing Engineering Technology / Technician. | 17-3026 | Industrial Engineering Technologists and Technicians | 21 | 20 | 213 | \$67,400 | 16 |
| 15.0805 | Mechanical/Mechanical Engineering Technology / Technician. | 17-3027 | Mechanical Engineering Technologists and Technicians | 13 | 13 | 129 | \$61,200 | |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 15.0805 | Mechanical/Mechanical Engineering Technology / Technician. | 17-3013 | Mechanical Drafters | 31 | 27 | 322 | \$64,900 | 40 |
| 15.0805 | Mechanical/Mechanical Engineering Technology / Technician. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 52.0205 | Operations Management and Supervision. | 11-3013 | Facilities Managers | 89 | 97 | 1,021 | \$85,800 | 3 |
| 52.0205 | Operations Management and Supervision. | 49-1011 | First-Line Supervisors of Mechanics, Installers, and Repairers | 250 | 259 | 2,714 | \$64,100 | 87 |
| 52.0205 | Operations Management and Supervision. | 11-9021 | Construction Managers | 174 | 199 | 2,314 | \$89,900 | 37 |
| 52.0205 | Operations Management and Supervision. | 11-3021 | Computer and Information Systems Managers | 94 | 109 | 1,140 | \$118,900 | 22 |
| 52.0205 | Operations Management and Supervision. | 13-1081 | Logisticians | 86 | 88 | 891 | \$72,800 | 29 |
| 52.0205 | Operations Management and Supervision. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 52.0205 | Operations Management and Supervision. | 11-3051 | Industrial Production Managers | 52 | 49 | 726 | \$118,200 | 30 |
| 52.0205 | Operations Management and Supervision. | 51-1011 | First-Line Supervisors of Production and Operating Workers | 322 | 307 | 3,234 | \$69,900 | 128 |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 13-1023 | Purchasing Agents, Except Wholesale, Retail, and Farm Products | 131 | 119 | 1,303 | \$67,300 | 37 |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 11-3061 | Purchasing Managers | 21 | 21 | 249 | \$104,200 | 21 |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 11-3013 | Facilities Managers | 89 | 97 | 1,021 | \$85,800 | 3 |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 11-3012 | Administrative Services Managers | 10 | 11 | 116 | \$85,100 | |
| 52.0202 | Purchasing, Procurement / Acquisitions and Contracts Management. | 13-1011 | Agents and Business Managers of Artists, | 3 | 3 | 21 | \$81,800 | |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| | | | Performers, and Athletes | | | | | |
| 15.0405 | Robotics Technology / Technician. | 17-3024 | Electro-Mechanical and Mechatronics Technologists and Technicians | 6 | 7 | 63 | \$56,400 | 7 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3053 | Outdoor Power Equipment and Other Small Engine Mechanics | 21 | 23 | 205 | \$35,100 | 11 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3051 | Motorboat Mechanics and Service Technicians | 35 | 35 | 353 | \$46,600 | 4 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3052 | Motorcycle Mechanics | 13 | 14 | 126 | \$38,000 | 1 |
| 15.1703 | Solar Energy Technology / Technician. | 17-3098 | Calibration Technologists and Technicians and Engineering Technologists and Technicians, Except Drafters, All Other | 34 | 34 | 356 | \$63,800 | 11 |
| 15.1703 | Solar Energy Technology / Technician. | 47-2231 | Solar Photovoltaic Installers | 9 | 12 | 60 | \$36,300 | 5 |
| 14.2701 | Systems Engineering. | 17-2112 | Industrial Engineers | 83 | 90 | 1,192 | \$97,300 | 106 |
| 14.2701 | Systems Engineering. | 17-3026 | Industrial Engineering Technologists and Technicians | 21 | 20 | 213 | \$67,400 | 16 |
| 14.2701 | Systems Engineering. | 11-9041 | Architectural and Engineering Managers | 49 | 51 | 667 | \$145,000 | 167 |
| 14.2701 | Systems Engineering. | 17-2199 | Engineers, All Other | 53 | 55 | 753 | \$113,900 | 8 |
| 14.2701 | Systems Engineering. | 25-1032 | Engineering Teachers, Postsecondary | 8 | 9 | 90 | \$117,900 | |
| 14.2701 | Systems Engineering. | 15-1245 | Database Administrators and Architects | 34 | 39 | 460 | \$83,400 | 17 |
| 14.2701 | Systems Engineering. | 17-3023 | Electrical and Electronic Engineering Technologists and Technicians | 48 | 49 | 490 | \$68,500 | 40 |
| 48.0508 | Welding Technology / Welder. | 51-4122 | Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders | 9 | 9 | 86 | \$45,000 | 1 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|------------------------------|----------|--|--------------------------|---------------------|-----------|---------------|----------------|
| 48.0508 | Welding Technology / Welder. | 51-4121 | Welders, Cutters, Solderers, and Brazers | 365 | 345 | 3,425 | \$51,000 | 60 |

Source: JobsEQ®. All data as of the 2019-2020 academic year, except related occupation data, which is as of 2021Q2, and wages, which are as of 2020. Total Annual Demand data reflects average annual rates from the ten-year forecast. Online Job Ads data represents found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling of postings only. Ads lacking zip code information but designating a place (e.g., city, town) may be assigned to the zip code with the greatest employment in that place for queries in this data.

FIGURE 25: TRANSPORTATION, DISTRIBUTION, AND LOGISTICS (CAREER & TECHNICAL EDUCATION CLUSTER) CIP TO SOC CROSSWALK – SARPC REGIONAL LABORSHED

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 47.0608 | Aircraft Powerplant Technology / Technician. | 49-3011 | Aircraft Mechanics and Service Technicians | 83 | 92 | 975 | \$66,800 | 70 |
| 47.0608 | Aircraft Powerplant Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 47.0607 | Airframe Mechanics and Aircraft Maintenance Technology / Technician. | 49-3011 | Aircraft Mechanics and Service Technicians | 83 | 92 | 975 | \$66,800 | 70 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 49-3021 | Automotive Body and Related Repairers | 85 | 90 | 866 | \$51,200 | 32 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 49-3022 | Automotive Glass Installers and Repairers | 14 | 15 | 149 | \$37,600 | 8 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 13-1032 | Insurance Appraisers, Auto Damage | 3 | 3 | 39 | \$63,600 | 7 |
| 47.0603 | Autobody/Collision and Repair Technology / Technician. | 51-9124 | Coating, Painting, and Spraying Machine Setters, Operators, and Tenders | 106 | 101 | 997 | \$47,200 | 45 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 47.0604 | Automobile/Automotive Mechanics Technology / Technician. | 49-3023 | Automotive Service Technicians and Mechanics | 335 | 333 | 3,466 | \$43,600 | 245 |
| 47.0604 | Automobile/Automotive Mechanics Technology / Technician. | 49-2096 | Electronic Equipment Installers and Repairers, Motor Vehicles | 5 | 4 | 47 | \$37,700 | 1 |
| 47.0604 | Automobile/Automotive Mechanics Technology / Technician. | 49-2093 | Electrical and Electronics Installers and Repairers, Transportation Equipment | 6 | 6 | 72 | \$56,300 | 17 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 49-2091 | Avionics Technicians | 17 | 18 | 222 | \$66,700 | 40 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 17-3021 | Aerospace Engineering and Operations Technologists and Technicians | 12 | 12 | 115 | \$77,700 | 4 |
| 47.0609 | Avionics Maintenance Technology / Technician. | 51-2011 | Aircraft Structure, Surfaces, Rigging, and Systems Assemblers | 18 | 15 | 227 | \$53,500 | 23 |
| 52.0201 | Business Administration and Management, General. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 52.0201 | Business Administration and Management, General. | 11-3012 | Administrative Services Managers | 10 | 11 | 116 | \$85,100 | |
| 52.0201 | Business Administration and Management, General. | 13-1198 | Project Management Specialists and Business Operations Specialists, All Other | 458 | 498 | 4,595 | \$73,600 | 237 |
| 52.0201 | Business Administration and Management, General. | 13-2053 | Insurance Underwriters | 18 | 18 | 211 | \$67,400 | 4 |
| 52.0201 | Business Administration and Management, General. | 13-1111 | Management Analysts | 258 | 297 | 2,575 | \$87,100 | 164 |
| 52.0201 | Business Administration and Management, General. | 13-1141 | Compensation, Benefits, and Job Analysis Specialists | 26 | 28 | 257 | \$59,300 | 7 |
| 52.0201 | Business Administration and Management, General. | 13-1051 | Cost Estimators | 92 | 91 | 944 | \$62,100 | 33 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 52.0201 | Business Administration and Management, General. | 13-1071 | Human Resources Specialists | 230 | 248 | 2,195 | \$58,300 | 193 |
| 52.0201 | Business Administration and Management, General. | 13-1081 | Logisticians | 86 | 88 | 891 | \$72,800 | 29 |
| 52.0201 | Business Administration and Management, General. | 11-1011 | Chief Executives | 80 | 72 | 1,170 | \$158,000 | 10 |
| 52.0201 | Business Administration and Management, General. | 11-1021 | General and Operations Managers | 872 | 940 | 9,717 | \$97,900 | 155 |
| 52.0201 | Business Administration and Management, General. | 11-2022 | Sales Managers | 105 | 112 | 1,164 | \$104,100 | 111 |
| 52.0201 | Business Administration and Management, General. | 11-3013 | Facilities Managers | 89 | 97 | 1,021 | \$85,800 | 3 |
| 52.0201 | Business Administration and Management, General. | 11-3051 | Industrial Production Managers | 52 | 49 | 726 | \$118,200 | 30 |
| 52.0201 | Business Administration and Management, General. | 11-3111 | Compensation and Benefits Managers | 3 | 4 | 38 | \$96,900 | 3 |
| 52.0201 | Business Administration and Management, General. | 11-3121 | Human Resources Managers | 40 | 44 | 459 | \$102,200 | 20 |
| 52.0201 | Business Administration and Management, General. | 11-3131 | Training and Development Managers | 9 | 9 | 94 | \$94,400 | 4 |
| 52.0201 | Business Administration and Management, General. | 11-9021 | Construction Managers | 174 | 199 | 2,314 | \$89,900 | 37 |
| 52.0201 | Business Administration and Management, General. | 11-3071 | Transportation, Storage, and Distribution Managers | 35 | 37 | 443 | \$90,200 | 77 |
| 52.0201 | Business Administration and Management, General. | 11-9151 | Social and Community Service Managers | 52 | 63 | 554 | \$63,500 | 8 |
| 52.0201 | Business Administration and Management, General. | 11-9198 | Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other | 327 | 327 | 4,379 | \$93,300 | 125 |
| 52.0101 | Business/Commerce, General. | 11-9198 | Personal Service Managers, All Other; Entertainment | 327 | 327 | 4,379 | \$93,300 | 125 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|-----------------------------|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| | | | and Recreation Managers, Except Gambling; and Managers, All Other | | | | | |
| 52.0101 | Business/Commerce, General. | 11-3071 | Transportation, Storage, and Distribution Managers | 35 | 37 | 443 | \$90,200 | 77 |
| 52.0101 | Business/Commerce, General. | 11-9151 | Social and Community Service Managers | 52 | 63 | 554 | \$63,500 | 8 |
| 52.0101 | Business/Commerce, General. | 11-9021 | Construction Managers | 174 | 199 | 2,314 | \$89,900 | 37 |
| 52.0101 | Business/Commerce, General. | 11-1021 | General and Operations Managers | 872 | 940 | 9,717 | \$97,900 | 155 |
| 52.0101 | Business/Commerce, General. | 11-3051 | Industrial Production Managers | 52 | 49 | 726 | \$118,200 | 30 |
| 52.0101 | Business/Commerce, General. | 11-3013 | Facilities Managers | 89 | 97 | 1,021 | \$85,800 | 3 |
| 52.0101 | Business/Commerce, General. | 11-2022 | Sales Managers | 105 | 112 | 1,164 | \$104,100 | 111 |
| 52.0101 | Business/Commerce, General. | 11-1011 | Chief Executives | 80 | 72 | 1,170 | \$158,000 | 10 |
| 52.0101 | Business/Commerce, General. | 13-1198 | Project Management Specialists and Business Operations Specialists, All Other | 458 | 498 | 4,595 | \$73,600 | 237 |
| 52.0101 | Business/Commerce, General. | 13-1051 | Cost Estimators | 92 | 91 | 944 | \$62,100 | 33 |
| 52.0101 | Business/Commerce, General. | 13-1111 | Management Analysts | 258 | 297 | 2,575 | \$87,100 | 164 |
| 52.0101 | Business/Commerce, General. | 13-2053 | Insurance Underwriters | 18 | 18 | 211 | \$67,400 | 4 |
| 52.0101 | Business/Commerce, General. | 13-2022 | Appraisers of Personal and Business Property | 1 | 2 | 19 | \$60,000 | |
| 52.0101 | Business/Commerce, General. | 11-3012 | Administrative Services Managers | 10 | 11 | 116 | \$85,100 | |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|--|--------------------------|---------------------|-----------|---------------|----------------|
| 52.0101 | Business/Commerce, General. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 47.0605 | Diesel Mechanics Technology / Technician. | 49-2096 | Electronic Equipment Installers and Repairers, Motor Vehicles | 5 | 4 | 47 | \$37,700 | 1 |
| 47.0605 | Diesel Mechanics Technology / Technician. | 49-2093 | Electrical and Electronics Installers and Repairers, Transportation Equipment | 6 | 6 | 72 | \$56,300 | 17 |
| 47.0605 | Diesel Mechanics Technology / Technician. | 49-3031 | Bus and Truck Mechanics and Diesel Engine Specialists | 110 | 113 | 1,174 | \$45,800 | 119 |
| 47.0605 | Diesel Mechanics Technology / Technician. | 49-3051 | Motorboat Mechanics and Service Technicians | 35 | 35 | 353 | \$46,600 | 4 |
| 46.0302 | Electrician. | 47-1011 | First-Line Supervisors of Construction Trades and Extraction Workers | 429 | 447 | 4,046 | \$60,800 | 198 |
| 46.0302 | Electrician. | 47-2111 | Electricians | 457 | 482 | 3,833 | \$49,300 | 98 |
| 46.0302 | Electrician. | 49-2098 | Security and Fire Alarm Systems Installers | 43 | 47 | 337 | \$42,300 | 30 |
| 46.0302 | Electrician. | 49-9097 | Signal and Track Switch Repairers | 2 | 2 | 23 | \$67,300 | |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 53-1041 | Aircraft Cargo Handling Supervisors | 5 | 5 | 45 | \$52,100 | 1 |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 53-1047 | First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors | 216 | 224 | 1,987 | \$52,400 | 22 |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 43-5011 | Cargo and Freight Agents | 30 | 32 | 309 | \$43,200 | 10 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|--|--------------------------|---------------------|-----------|---------------|----------------|
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 43-5071 | Shipping, Receiving, and Inventory Clerks | 205 | 189 | 2,145 | \$38,500 | 54 |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 13-1081 | Logisticians | 86 | 88 | 891 | \$72,800 | 29 |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 11-3051 | Industrial Production Managers | 52 | 49 | 726 | \$118,200 | 30 |
| 52.0203 | Logistics, Materials, and Supply Chain Management. | 11-3071 | Transportation, Storage, and Distribution Managers | 35 | 37 | 443 | \$90,200 | 77 |
| 47.0616 | Marine Maintenance / Fitter and Ship Repair Technology / Technician. | 49-3051 | Motorboat Mechanics and Service Technicians | 35 | 35 | 353 | \$46,600 | 4 |
| 52.0205 | Operations Management and Supervision. | 51-1011 | First-Line Supervisors of Production and Operating Workers | 322 | 307 | 3,234 | \$69,900 | 128 |
| 52.0205 | Operations Management and Supervision. | 49-1011 | First-Line Supervisors of Mechanics, Installers, and Repairers | 250 | 259 | 2,714 | \$64,100 | 87 |
| 52.0205 | Operations Management and Supervision. | 13-1081 | Logisticians | 86 | 88 | 891 | \$72,800 | 29 |
| 52.0205 | Operations Management and Supervision. | 11-9021 | Construction Managers | 174 | 199 | 2,314 | \$89,900 | 37 |
| 52.0205 | Operations Management and Supervision. | 11-3051 | Industrial Production Managers | 52 | 49 | 726 | \$118,200 | 30 |
| 52.0205 | Operations Management and Supervision. | 11-3013 | Facilities Managers | 89 | 97 | 1,021 | \$85,800 | 3 |
| 52.0205 | Operations Management and Supervision. | 11-3021 | Computer and Information Systems Managers | 94 | 109 | 1,140 | \$118,900 | 22 |
| 52.0205 | Operations Management and Supervision. | 25-1011 | Business Teachers, Postsecondary | 18 | 20 | 205 | \$107,400 | |
| 44.0401 | Public Administration. | 11-1031 | Legislators | 16 | 18 | 213 | \$35,000 | |
| 44.0401 | Public Administration. | 11-3071 | Transportation, Storage, and Distribution Managers | 35 | 37 | 443 | \$90,200 | 77 |
| 44.0401 | Public Administration. | 11-1011 | Chief Executives | 80 | 72 | 1,170 | \$158,000 | 10 |

| CIP Code | CIP Title | SOC Code | SOC Title | Annual Separation Demand | Total Annual Demand | Employees | Average Wages | Online Job Ads |
|----------|--|----------|---|--------------------------|---------------------|-----------|---------------|----------------|
| 44.0401 | Public Administration. | 11-1021 | General and Operations Managers | 872 | 940 | 9,717 | \$97,900 | 155 |
| 44.0401 | Public Administration. | 11-9131 | Postmasters and Mail Superintendents | 4 | 3 | 60 | \$76,900 | 1 |
| 44.0401 | Public Administration. | 11-9151 | Social and Community Service Managers | 52 | 63 | 554 | \$63,500 | 8 |
| 44.0401 | Public Administration. | 11-9198 | Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Managers, All Other | 327 | 327 | 4,379 | \$93,300 | 125 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3052 | Motorcycle Mechanics | 13 | 14 | 126 | \$38,000 | 1 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3053 | Outdoor Power Equipment and Other Small Engine Mechanics | 21 | 23 | 205 | \$35,100 | 11 |
| 47.0606 | Small Engine Mechanics and Repair Technology / Technician. | 49-3051 | Motorboat Mechanics and Service Technicians | 35 | 35 | 353 | \$46,600 | 4 |
| 49.0205 | Truck and Bus Driver / Commercial Vehicle Operator and Instructor. | 25-1194 | Career/Technical Education Teachers, Postsecondary | 42 | 46 | 487 | \$46,700 | 90 |
| 49.0205 | Truck and Bus Driver / Commercial Vehicle Operator and Instructor. | 53-3032 | Heavy and Tractor-Trailer Truck Drivers | 910 | 911 | 7,992 | \$39,400 | 924 |
| 49.0205 | Truck and Bus Driver / Commercial Vehicle Operator and Instructor. | 53-3033 | Light Truck Drivers | 480 | 505 | 4,096 | \$34,300 | 434 |
| 49.0205 | Truck and Bus Driver / Commercial Vehicle Operator and Instructor. | 53-3052 | Bus Drivers, Transit and Intercity | 71 | 75 | 537 | \$30,000 | 4 |
| 49.0205 | Truck and Bus Driver / Commercial Vehicle Operator and Instructor. | 53-3058 | Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity | 372 | 392 | 2,968 | \$23,600 | 124 |

Source: JobsEQ®. All data as of the 2019-2020 academic year, except related occupation data, which is as of 2021Q2, and wages, which are as of 2020. Total Annual Demand data reflects average annual rates from the ten-year forecast. Online Job Ads data represents found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling of postings only. Ads lacking zip code information but designating a place (e.g., city, town) may be assigned to the zip code with the greatest employment in that place for queries in this data.

Gaps and Demands – Ten-Year Forecast //

As industries and occupations across the nation change, they are presenting both opportunities and challenges—especially in rural America. For example, jobs in traditional sectors of employment such as manufacturing and agriculture have seen nationwide declines over the past decade. There are several reasons the occupation mix for a specific industry might decline or increase:

- **Technology and production methods** – The introduction of new tools, automation, and technology can reduce the need for or replace workers. Advanced technology can bring new and often higher-paying jobs for individuals with more technical skills.
- **Outsourcing and organization** – As companies grow or restructure, contract workers often fill specific occupations, limiting employment growth within a company.
- **Replacing services or products** – Consumer preferences for products and services change over time, impacting employment for the associated occupations.

With population growth and decline varying throughout the SARPC Region and automation and technology pervading many industries, it is important to look at the total forecasted demands and supply gaps for occupations. The data on the following pages compares occupation demand growth with projected educational attainment from residents, revealing the potential for supply shortfalls or saturation in the workforce (i.e., the annual supply gap).

- For example, when a region has an occupation that is expected to grow quickly but the educational requirements for the occupation do not match well with the educational attainment of residents, there is a high potential for an occupation shortfall (negative **red** number).
- Slow-growing or declining occupations due to factors such as automation or technology, as well as increasing supply, result in potential saturation (positive **green** number) in the market.

FIGURE 26: POTENTIAL AVERAGE ANNUAL OCCUPATION GAP AND DEMANDS OVER TEN YEARS

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|--|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 29-1000 | Healthcare Diagnosing or Treating Practitioners | -124 | 10,772 | 98 | 555 | 653 | 11,749 |
| 11-9000 | Other Management Occupations | -52 | 6,987 | 36 | 592 | 628 | 7,347 |
| 29-2000 | Health Technologists and Technicians | -51 | 5,852 | 43 | 429 | 472 | 6,280 |
| 15-1200 | Computer Occupations | -49 | 4,749 | 47 | 364 | 410 | 5,217 |
| 49-9000 | Other Installation, Maintenance, and Repair Occupations | -39 | 7,088 | 32 | 700 | 733 | 7,410 |
| 13-1000 | Business Operations Specialists | -34 | 5,811 | 20 | 579 | 598 | 6,006 |
| 11-1000 | Top Executives | -33 | 4,556 | 19 | 397 | 415 | 4,742 |
| 25-2000 | Preschool, Elementary, Middle, Secondary, and Special Education Teachers | -28 | 6,833 | 39 | 536 | 576 | 7,227 |
| 47-2000 | Construction Trades Workers | -28 | 11,495 | 34 | 1,274 | 1,307 | 11,832 |
| 13-2000 | Financial Specialists | -26 | 4,077 | 14 | 367 | 381 | 4,212 |
| 11-3000 | Operations Specialties Managers | -25 | 2,451 | 18 | 200 | 218 | 2,628 |
| 31-9000 | Other Healthcare Support Occupations | -20 | 3,181 | 43 | 388 | 431 | 3,614 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|---|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 21-1000 | Counselors, Social Workers, and Other Community and Social Service Specialists | -20 | 2,531 | 37 | 277 | 314 | 2,896 |
| 17-2000 | Engineers | -18 | 2,893 | 0 | 198 | 199 | 2,896 |
| 25-1000 | Postsecondary Teachers | -17 | 1,534 | 15 | 133 | 147 | 1,680 |
| 33-3000 | Law Enforcement Workers | -14 | 2,216 | 7 | 166 | 173 | 2,286 |
| 49-3000 | Vehicle and Mobile Equipment Mechanics, Installers, and Repairers | -10 | 4,198 | 1 | 406 | 407 | 4,208 |
| 41-3000 | Sales Representatives, Services | -10 | 2,706 | 11 | 315 | 326 | 2,817 |
| 47-1000 | Supervisors of Construction and Extraction Workers | -10 | 1,842 | 6 | 194 | 200 | 1,904 |
| 31-1100 | Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides | -9 | 6,705 | 151 | 911 | 1,062 | 8,216 |
| 49-1000 | Supervisors of Installation, Maintenance, and Repair Workers | -8 | 1,272 | 2 | 117 | 119 | 1,297 |
| 41-4000 | Sales Representatives, Wholesale and Manufacturing | -8 | 2,573 | 0 | 267 | 267 | 2,570 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|--|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 37-1000 | Supervisors of Building and Grounds Cleaning and Maintenance Workers | -8 | 996 | 14 | 117 | 131 | 1,134 |
| 53-3000 | Motor Vehicle Operators | -7 | 8,506 | 17 | 998 | 1,015 | 8,676 |
| 21-2000 | Religious Workers | -7 | 1,489 | 11 | 178 | 189 | 1,604 |
| 33-2000 | Firefighting and Prevention Workers | -7 | 841 | 6 | 60 | 66 | 901 |
| 43-1000 | Supervisors of Office and Administrative Support Workers | -6 | 2,765 | -7 | 287 | 280 | 2,695 |
| 31-2000 | Occupational Therapy and Physical Therapist Assistants and Aides | -5 | 441 | 13 | 60 | 74 | 575 |
| 27-2000 | Entertainers and Performers, Sports and Related Workers | -5 | 1,161 | 9 | 152 | 161 | 1,252 |
| 23-1000 | Lawyers, Judges, and Related Workers | -5 | 1,212 | 3 | 58 | 61 | 1,245 |
| 27-3000 | Media and Communication Workers | -4 | 898 | 1 | 96 | 97 | 911 |
| 25-3000 | Other Teachers and Instructors | -4 | 1,972 | 11 | 230 | 241 | 2,080 |
| 47-4000 | Other Construction and Related Workers | -4 | 1,018 | 5 | 121 | 126 | 1,069 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|--|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 39-1000 | Supervisors of Personal Care and Service Workers | -4 | 542 | 6 | 60 | 66 | 603 |
| 53-1000 | Supervisors of Transportation and Material Moving Workers | -4 | 990 | 2 | 107 | 109 | 1,011 |
| 11-2000 | Advertising, Marketing, Promotions, Public Relations, and Sales Managers | -4 | 697 | 3 | 62 | 65 | 723 |
| 15-2000 | Mathematical Science Occupations | -3 | 128 | 3 | 10 | 13 | 159 |
| 19-3000 | Social Scientists and Related Workers | -3 | 299 | 2 | 25 | 27 | 318 |
| 27-4000 | Media and Communication Equipment Workers | -3 | 455 | 3 | 48 | 51 | 487 |
| 25-9000 | Other Educational Instruction and Library Occupations | -3 | 1,624 | 9 | 169 | 177 | 1,710 |
| 49-2000 | Electrical and Electronic Equipment Mechanics, Installers, and Repairers | -3 | 1,193 | 0 | 122 | 121 | 1,189 |
| 33-1000 | Supervisors of Protective Service Workers | -3 | 474 | 2 | 35 | 37 | 492 |
| 19-2000 | Physical Scientists | -2 | 248 | 1 | 25 | 25 | 254 |
| 39-5000 | Personal Appearance Workers | -2 | 2,038 | 6 | 251 | 256 | 2,097 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|--|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 53-2000 | Air Transportation Workers | -2 | 272 | 2 | 28 | 30 | 288 |
| 25-4000 | Librarians, Curators, and Archivists | -2 | 463 | 2 | 54 | 56 | 483 |
| 17-3000 | Drafters, Engineering Technicians, and Mapping Technicians | -2 | 1,040 | -3 | 103 | 100 | 1,012 |
| 51-1000 | Supervisors of Production Workers | -2 | 1,454 | -7 | 145 | 138 | 1,387 |
| 53-4000 | Rail Transportation Workers | -1 | 164 | 0 | 15 | 15 | 160 |
| 47-5000 | Extraction Workers | -1 | 194 | 2 | 26 | 28 | 210 |
| 29-9000 | Other Healthcare Practitioners and Technical Occupations | -1 | 163 | 2 | 10 | 11 | 180 |
| 17-1000 | Architects, Surveyors, and Cartographers | -1 | 269 | 0 | 20 | 20 | 268 |
| 19-4000 | Life, Physical, and Social Science Technicians | -1 | 395 | -1 | 42 | 41 | 389 |
| 19-5000 | Occupational Health and Safety Specialists and Technicians | -1 | 195 | 0 | 11 | 11 | 193 |
| 19-1000 | Life Scientists | -1 | 182 | 1 | 18 | 18 | 188 |
| 41-9000 | Other Sales and Related Workers | 0 | 1,875 | 0 | 218 | 218 | 1,874 |
| 27-1000 | Art and Design Workers | 0 | 1,219 | -6 | 120 | 114 | 1,159 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|---|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 39-6000 | Baggage Porters, Bellhops, and Concierges | 0 | 107 | 1 | 16 | 17 | 117 |
| 53-5000 | Water Transportation Workers | 0 | 262 | -1 | 27 | 25 | 248 |
| 23-2000 | Legal Support Workers | 0 | 618 | 5 | 65 | 70 | 667 |
| 45-1000 | Supervisors of Farming, Fishing, and Forestry Workers | 0 | 69 | 0 | 10 | 11 | 71 |
| 37-3000 | Grounds Maintenance Workers | 0 | 2,678 | 38 | 370 | 408 | 3,059 |
| 39-2000 | Animal Care and Service Workers | 0 | 544 | 13 | 96 | 109 | 670 |
| 51-5100 | Printing Workers | +1 | 230 | -3 | 24 | 22 | 203 |
| 45-3000 | Fishing and Hunting Workers | +1 | 123 | -1 | 19 | 18 | 113 |
| 51-8000 | Plant and System Operators | +1 | 872 | -7 | 83 | 75 | 799 |
| 39-4000 | Funeral Service Workers | +1 | 171 | -1 | 24 | 23 | 162 |
| 39-7000 | Tour and Travel Guides | +1 | 81 | 1 | 15 | 16 | 92 |
| 43-2000 | Communications Equipment Operators | +2 | 164 | -3 | 18 | 15 | 131 |
| 45-4000 | Forest, Conservation, and Logging Workers | +2 | 207 | -2 | 32 | 30 | 186 |
| 51-7000 | Woodworkers | +2 | 614 | -2 | 72 | 70 | 593 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|---|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 43-5000 | Material Recording, Scheduling, Dispatching, and Distributing Workers | +3 | 3,512 | -22 | 315 | 293 | 3,292 |
| 47-3000 | Helpers, Construction Trades | +3 | 628 | 1 | 85 | 86 | 637 |
| 53-6000 | Other Transportation Workers | +3 | 654 | 1 | 88 | 89 | 668 |
| 51-3000 | Food Processing Workers | +4 | 1,092 | -1 | 142 | 141 | 1,084 |
| 51-6000 | Textile, Apparel, and Furnishings Workers | +4 | 1,207 | -4 | 145 | 142 | 1,171 |
| 45-2000 | Agricultural Workers | +5 | 896 | 6 | 151 | 157 | 959 |
| 41-1000 | Supervisors of Sales Workers | +5 | 4,227 | -17 | 448 | 431 | 4,062 |
| 37-2000 | Building Cleaning and Pest Control Workers | +6 | 7,353 | 45 | 1,007 | 1,052 | 7,800 |
| 35-1000 | Supervisors of Food Preparation and Serving Workers | +7 | 2,715 | 23 | 426 | 449 | 2,946 |
| 51-4000 | Metal Workers and Plastic Workers | +8 | 4,417 | -37 | 455 | 418 | 4,046 |
| 43-3000 | Financial Clerks | +11 | 4,728 | -29 | 533 | 505 | 4,440 |
| 33-9000 | Other Protective Service Workers | +13 | 2,606 | 12 | 376 | 389 | 2,729 |
| 43-9000 | Other Office and Administrative Support Workers | +15 | 4,567 | -27 | 523 | 496 | 4,299 |
| 39-9000 | Other Personal Care and Service Workers | +15 | 3,048 | 25 | 490 | 515 | 3,296 |

| SOC | Occupation | Projected Annual Supply Gap | 2021 Employment | Annual Growth Demand | Annual Separation Demand | Total Annual Demand | Projected 2031 Employment |
|---------|--|-----------------------------|-----------------|----------------------|--------------------------|---------------------|---------------------------|
| 39-3000 | Entertainment Attendants and Related Workers | +18 | 937 | 8 | 208 | 217 | 1,022 |
| 43-4000 | Information and Record Clerks | +20 | 9,947 | 11 | 1,321 | 1,333 | 10,062 |
| 51-9000 | Other Production Occupations | +20 | 5,233 | -32 | 625 | 593 | 4,911 |
| 51-2000 | Assemblers and Fabricators | +23 | 2,637 | -45 | 273 | 228 | 2,186 |
| 43-6000 | Secretaries and Administrative Assistants | +27 | 8,274 | -73 | 888 | 815 | 7,545 |
| 35-9000 | Other Food Preparation and Serving Related Workers | +31 | 2,409 | 22 | 463 | 485 | 2,626 |
| 35-2000 | Cooks and Food Preparation Workers | +34 | 7,639 | 65 | 1,183 | 1,248 | 8,289 |
| 53-7000 | Material Moving Workers | +42 | 12,628 | 5 | 1,702 | 1,707 | 12,677 |
| 35-3000 | Food and Beverage Serving Workers | +168 | 13,657 | 149 | 2,644 | 2,793 | 15,146 |
| 41-2000 | Retail Sales Workers | +207 | 19,322 | -28 | 3,110 | 3,082 | 19,044 |

Source: JobsEQ®. Projected Annual Supply Gap data is developed by Chmura and updated quarterly. 2021 Employment and Demand projections are based on a starting date of 2021Q1. Figures may not sum due to rounding.

Sector Pathways »

Each EDO within the SARPC Region focuses on a multitude of industry sectors for recruitment, retention, and expansion purposes. The four most common sectors are Advanced Manufacturing; Aviation, Space, and Aerospace; Professional, Scientific, and Technical Services; and Transportation & Warehousing. The tables on the following pages illustrate the relationships between and potential movement (from left to right) among occupations that share similar skill sets in each county. Developing career pathways promotes industry employment growth and workforce engagement.

Baldwin County Sector Pathways //

ADVANCED MANUFACTURING

| | |
|--|---|
| First-Line Supervisors of Mechanics, Installers, and Repairers | First-Line Supervisors of Production and Operating Workers |
| First-Line Supervisors of Housekeeping and Janitorial Workers | |
| First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers | |
| Chefs and Head Cooks | |
| First-Line Supervisors of Farming, Fishing, and Forestry Workers | |
| Inspectors, Testers, Sorters, Samplers, and Weighers | Team Assemblers |
| Assemblers and Fabricators, All Other | |
| Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers | |
| Mail Clerks and Mail Machine Operators, Except Postal Service | |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | Helpers-Production Workers |
| Landscaping and Groundskeeping Workers | |
| Dishwashers | |
| Farmworkers and Laborers, Crop, Nursery, and Greenhouse | |
| Sewing Machine Operators | |

AVIATION, SPACE, AND AEROSPACE

| | |
|---|---|
| Electrical Engineers | Aerospace Engineers |
| Engineers, All Other | |
| Mechanical Engineers | |
| Electronics Engineers, Except Computer | |
| Materials Engineers | |
| Mechanical Engineers | Industrial Engineers |
| Electronics Engineers, Except Computer | |
| Materials Engineers | |
| Logisticians | |
| Commercial and Industrial Designers | |
| Sales Engineers | |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | Aircraft Mechanics and Service Technicians |
| Medical Equipment Repairers | |
| Mechanical Engineering Technologies and Technicians | |
| Electro-Mechanical and Mechatronics Technologists and Technicians | |

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

| | |
|--|---|
| Management Analysts | Personal Service Managers, All Other; Entertainment and Recreation Managers, Except Gambling; and Mangers, All Other |
| First-Line Supervisors of Non-Retail Sales Workers | |
| Purchasing Agents, Except Wholesale, Retail, and Farm Products | |
| Cost Estimators | |
| Training and Development Specialists | |
| Securities, Commodities, and Financial Services Sales Agents | Accountants and Auditors |
| Compliance Officers | |
| Tax Preparers | |
| Insurance Underwriters | |
| Credit Analysts | |
| Judges, Magistrate Judges, and Magistrates | Lawyers |
| Judicial Law Clerks | |
| Administrative Law Judges, Adjudicators, and Hearing Officers | |
| Arbitrators, Mediators, and Conciliators | |

TRANSPORTATION AND WAREHOUSING

| | |
|---|---|
| Security Guards | Postal Service Mail Carriers |
| Light Truck Drivers | |
| Passenger Vehicle Drivers, Except Bus Drivers, Transit, and Intercity | |
| Refuse and Recyclable Material Collectors | |
| Couriers and Messengers | |
| Light Truck Drivers | Heavy and Tractor-Trailer Truck Drivers |
| Highway Maintenance Workers | |
| Bus Drivers, Transit and Intercity | |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation | |
| Railroad Brake, Signal, and Switch Operators and Locomotive Firers | |
| Helpers-Roofers | Laborers and Freight, Stock, and Material Movers, Hand |

Escambia County Sector Pathways //

ADVANCED MANUFACTURING

| | |
|--|---|
| First-Line Supervisors of Mechanics, Installers, Repairers | First-Line Supervisors of Production and Operating Workers |
| First-Line Supervisors of Housekeeping, Janitorial Workers | |
| First-Line Supervisors of Landscaping, Lawn Service, Groundskeeping Workers | |
| First-Line Supervisors of Farming, Fishing, Forestry Workers | |
| Chefs and Head Cooks | |
| Inspectors, Testers, Sorters, Samplers, Weighers | Team Assemblers |
| Assemblers and Fabricators, All Other | |
| Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers | |
| Mail Clerks, Mail Machine Operators, Except Postal Service | Helpers-Production Workers |
| Janitors and Cleaners, Except Maids, Housekeeping Cleaners | |
| Landscaping and Groundskeeping Workers | |
| Sewing Machine Operators | |
| Dishwashers | |
| Farmworkers and Laborers, Crop, Nursery, Greenhouse | |

AVIATION, SPACE, AND AEROSPACE

| | |
|--|---|
| Electrical Engineers | Aerospace Engineers |
| Mechanical Engineers | |
| Engineers, All Other | |
| Electronics Engineers, Except Computer | |
| Health and Safety Engineers, Except Mining Safety Engineers and Inspectors | |
| Mechanical Engineers | Industrial Engineers |
| Logisticians | |
| Calibration Technologists and Technicians, Except Drafters, All Other | |
| Commercial and Industrial Designers | |
| Materials Engineers | Aircraft Mechanics and Service Technicians |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | |
| Mechanical Engineering Technologies and Technicians | |
| Medical Equipment Repairers | |
| Electro-Mechanical and Mechatronics Technologists and Technicians | |

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

| | |
|---|---|
| Securities, Commodities, Financial Services Sales Agents | Accountants and Auditors |
| Compliance Officers | |
| Credit Analysts | |
| Insurance Underwriters | |
| Tax Preparers | |
| Judges, Magistrate Judges, and Magistrates | Lawyers |
| Judicial Law Clerks | |
| Administrative Law Judges, Adjudicators, Hearing Officers | |
| Arbitrators, Mediators, and Conciliators | |
| Tax Preparers | Bookkeeping, Accounting, and Auditing Clerks |
| Court, Municipal, and License Clerks | |
| Billing and Posting Clerks | |
| Loan Interviewers and Clerks | |
| Library Technicians | |

TRANSPORTATION AND WAREHOUSING

| | |
|---|---|
| Security Guards | Postal Service Mail Carriers |
| Light Truck Drivers | |
| Passenger Vehicle Drivers, Except Bus Drivers, Transit, and Intercity | |
| Refuse and Recyclable Material Collectors | |
| Baggage Porters and Bellhops | |
| Light Truck Drivers | Heavy and Tractor-Trailer Truck Drivers |
| Highway Maintenance Workers | |
| Bus Drivers, Transit and Intercity | |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation | |
| Railroad Brake, Signal, Switch Operators, Locomotive Firers | Laborers and Freight, Stock, and Material Movers, Hand |
| Helpers-Roofters | |

Mobile County Sector Pathways //

ADVANCED MANUFACTURING

| | |
|--|---|
| First-Line Supervisors of Mechanics, Installers, and Repairers | First-Line Supervisors of Production and Operating Workers |
| First-Line Supervisors of Housekeeping and Janitorial Workers | |
| First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers | |
| Chefs and Head Cooks | |
| First-Line Supervisors of Farming, Fishing, and Forestry Workers | |
| Inspectors, Testers, Sorters, Samplers, and Weighers | Team Assemblers |
| Assemblers and Fabricators, All Other | |
| Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers | |
| Mail Clerks and Mail Machine Operators, Except Postal Service | |
| Inspectors, Testers, Sorters, Samplers, and Weighers | Helpers-Production Workers |
| Team Assemblers | |
| Industrial Truck and Tractor Operators | |
| Helpers-Production Workers | |
| Structural Metal Fabricators and Fitters | |

AVIATION, SPACE, AND AEROSPACE

| | |
|---|---|
| Electrical Engineers | Aerospace Engineers |
| Mechanical Engineers | |
| Engineers, All Other | |
| Electronics Engineers, Except Computer | |
| Materials Engineers | |
| Mechanical Engineers | Industrial Engineers |
| Materials Engineers | |
| Logisticians | |
| Calibration Technologists and Technicians, Except Drafters, All Other | |
| Commercial and Industrial Designers | Aircraft Mechanics and Service Technicians |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | |
| Medical Equipment Repairers | |
| Mechanical Engineering Technologies and Technicians | |
| Electro-Mechanical and Mechatronics Technologists and Technicians | |

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

| | |
|---|--|
| Securities, Commodities, and Financial Services Sales Agents | Accountants and Auditors |
| Compliance Officers | |
| Insurance Underwriters | |
| Tax Preparers | |
| Credit Analysts | |
| Computer Systems Analysts | Software Developers and Software Quality Assurance Analysts and Testers |
| Network and Computer Systems Administrators | |
| Computers Programmers | |
| Computer Occupations, All Other | |
| Database Administration and Architects | |
| Judges, Magistrate Judges, and Magistrates | Lawyers |
| Judicial Law Clerks | |
| Administrative Law Judges, Adjudicators, and Hearing Officers | |
| Arbitrators, Mediators, and Conciliators | |

TRANSPORTATION AND WAREHOUSING

| | |
|---|---|
| Light Truck Drivers | Heavy and Tractor-Trailer Truck Drivers |
| Highway Maintenance Workers | |
| Bus Drivers, Transit and Intercity | |
| Pesticide Handlers, Sprayers, and Applicators, Vegetation | |
| Motorboat Operators | |
| Passenger Vehicle Drivers, Except Bus Drivers, Transit, and Intercity | Light Truck Drivers |
| Industrial Truck and Tractor Operators | |
| Refuse and Recyclable Material Collectors | |
| Couriers and Messengers | |
| Helpers-Roofters | Laborers and Freight, Stock, and Material Movers, Hand |

Workforce Conclusions //

In VisionFirst's assessment of the labor draw in the SARPC Region and within the SARPC Regional Laborshed, three main aspects of concern were identified:

- Current labor market conditions
- Sufficient degrees and certificates to supply future labor market needs
- Potential occupation gaps and demands, along with pathways

Demand for trained and skilled workers is high and will continue to increase as industries adopt new technologies. The regional labor shed contains a highly-educated workforce that consistently outpaces industry education and training requirements. More than 30,000 employees have received more education than their current jobs require. This is a significant selling point for the SARPC Region when trying to expand and attract skilled jobs.

A skilled and educated workforce is a strong competitive advantage for the Region both in the Manufacturing CTE Cluster and across all occupations. The Transportation CTE Cluster, however, has a smaller margin and poses a potential risk when trying to expand and attract industry.

- **Manufacturing Cluster** – Nearly 2,000 underemployed
- **Transportation Cluster** – Nearly 1,500 underemployed

A strong talent pipeline provides a steady workforce stream. The Region's institutions grant nearly 25,000 certificates and degrees annually, with more than 900 Manufacturing graduates and more than 3,500 Transportation, Distribution, and Logistics graduates each year. The ability to supply growing industries with a qualified and skilled workforce is crucial in business recruitment and expansion; this selling point should be highlighted in SARPC's messaging.

The SARPC Region has a high concentration of outbound commuters, indicating travel to other Counties for higher-paying positions. This could be potential employment for a new industry paying competitive wages within the Region.

It is also important to understand career sector pathways for occupations expected to decline or expand in the Region. Transferable skills or upskilling will be the key to a continued balance between supply and demand for the workforce in the Region.

SWOT Analysis & Leverage Points

Based on conversations with stakeholders and in-depth research, VisionFirst identified the Region's strengths, weaknesses, opportunities, and threats regarding economic development efforts as well as the Region's overall competitiveness. This analysis is an evaluation of the overall economic development climate, not solely the efforts of each EDO, and was based heavily on qualitative input as well as industry knowledge.

STRENGTHS

- Strong existing industries
- Committed workforce partners
- Digital education programming
- Growing population
- Robust transportation infrastructure
- Increased willingness to work together as a region
- Agriculture and timber industry

WEAKNESSES

- Geographic barriers to the Region
- Perceptions around the State's image
- Impacts of COVID on the workforce
- Absence of affordable, reliable internet access
- Weak EDO strategic collaboration



OPPORTUNITIES

- Poarch Band of Creek Tribe business support
- Increase business formation coordination
- Increase marketing of sites and talent
- Utilize abundant timber resources
- Utilize urban cores
- Leverage international investment
- Continue to highlight port capacity and investment

THREATS

- Recovery of service sector
- Loss of graduates from regional schools
- Long-term impacts of COVID on the economy
- Residential environmental concerns
- Natural disasters

Leverage Points »

SWOT analyses are often conducted for discovery purposes only. VisionFirst goes beyond the initial analysis and develops strategies to leverage or capitalize on each strength or opportunity and to minimize or mitigate weaknesses and threats. These strategies, or “leverage points,” help illustrate the timeliest, most important actions for the Region to execute to strengthen its position, achieve its mission, and attain a greater competitive stance for jobs and investment.

| Strength | Leverage Point |
|---|--|
| Robust infrastructure and transportation assets | Capture nearshoring opportunities resulting from COVID by identifying and targeting supply chain companies. |
| Committed workforce partners | Foster connections between EDOs and workforce development to better support and anticipate industry needs. |
| Strong agriculture and timber industry | Foster capital investment and promote automation and new technology adoption to increase production and efficiencies. |
| Weakness | Leverage Point |
| Geographic barriers to the Region and lack of regionalism | Find common goals on issues such as transportation, and coordinate efforts to advocate for federal infrastructure dollars. |
| Perceptions surrounding the State’s image as it relates to recruitment | Use a coordinated marketing effort to highlight the brand recognition of industry leaders that have recently made significant investments within the State. Call particular attention to the State’s business climate, geographic advantages, infrastructure, and skilled workforce. |
| Opportunity | Leverage Point |
| Increased business formation coordination | Use the Innovation Portal to foster businesses and utilize regional assets to support second- and third-stage companies. |
| Leverage international investment | Use current foreign direct investment companies to tell the Region’s story. |
| Threats | Leverage Point |
| Long-term impacts of COVID on the workforce | Use research to address the needs of employee management, performance, and experience strategies. |
| Natural disasters | Collaborate on using regional educational assets to develop new technologies to mitigate the risk of damage from hurricanes. |

Key Findings from Engagement & Assessment »

In addition to the SWOT analysis—and given the diversity of the Counties—it was important to consider the research, stakeholder engagement, and site selector perspective collectively. With that in mind, four key findings were outlined that led to the formation of the strategies and tactics.



CONNECTIVITY PRESENTS A COMPETITIVE DIFFERENTIATOR

- The Region’s location in the Southeast positions it for continued competitive project wins—especially in the face of COVID supply chain disruptions.
- The availability of sites and industrial parks near infrastructure assets such as airports, ports, and railways offer opportunities for increased regional coordination.



BUSINESS FORMATION INITIATIVES CAN BUILD RESILIENCY

- The Region is home to several business formation initiatives that have shown success; with greater regional coordination, those efforts could be enhanced.
- The Region could see an increase in minority business start-ups and sustainability with additional assistance and outreach.



LONG-TERM IMPACTS OF COVID REMAIN UNKNOWN

- While the immediate impacts of COVID and the initial economic recovery are clear, the ongoing crisis underscores the unknown.
- Coordinating with both regional workforce providers and industry will be critical to mitigate labor force participation declines and existing industry challenges.



REGIONAL COORDINATION COULD BE LEVERAGED

- The three Counties and the respective EDOs are each unique in their size, role, and local opportunities. Coordinated marketing efforts, however, could enhance the Region overall and provide better leverage for available funds.
- Given its strategic location, the Region could leverage its collective voice for advocacy and investment in transportation, broadband expansion, and other competitive drivers.

Regional Goals

- 1. Align Education and Workforce Initiatives**
- 2. Evaluate and Revise the Incentive Toolbox**
- 3. Increase Coordination of Business Formation Efforts**
- 4. Build Regional Marketing and Outreach Platforms**



Strategies & Tactics

To develop the goals and their corresponding strategies and tactics, VisionFirst reviewed current economic development activities to assess their effectiveness in aligning assets, talent, and resources in a manner that is competitive for jobs and investment.

Combining facts and trends drawn from the data with economic development best practices, a group of six regional goals were identified for implementation. Within each goal is a series of strategies and tactics that provide an approach to implementation.

The following timeframes are used throughout the plan:

- **Short-Term** – Three months to one year
- **Mid-Term** – One year to three years
- **Long-Term** – Three years to five years

TABLE OF FIGURES

This section of the plan contains a considerable amount of data and charts. A table of figures is provided below.

Figure 27: Real-Time Job Openings Data 105

Figure 28: Unemployment Rate Snapshot..... 106

Figure 29: October 2021 Unemployment Data 106

Figure 30: 2020 U.S. Census Employment Status 109

Figure 31: Industry Sectors with High Percent of Female Employees & Greater Loss of Jobs 111

Figure 32: SARPC Region Migration and Population Rates 118

Figure 33: Hard Skill Gaps (Top and Bottom 10) in Manufacturing (CTE Cluster) 123

Figure 34: Certificate Gaps (Top and Bottom 10) Manufacturing (CTE Cluster) 123

Figure 35: Small Business Retail Establishments in Escambia County..... 136

Figure 36: Competitive Property Checklist 148

1. Align Education & Workforce Initiatives

Workforce and talent development has always been a major component of economic development activities. Can a community demonstrate an available, skilled, and reliable workforce? Are the training programs and partners in place to support additional skill development? Is the local education system, public and private, graduating students in career and technical education programs to serve employer needs?

Developing a strong workforce offers opportunities for meaningful collaboration and measurable results. A more sustainable and resilient workforce not only makes the Region more competitive from an economic development standpoint but can also change the socioeconomic dynamics of the Region.

The challenge, as noted numerous times in this plan, is that each county is distinct in its EDOs, county priorities, industry targets, and demographics. But neither prospects nor projects determine an available workforce based on county lines. Despite the difficulties in identifying and implementing opportunities, the Region must come together to develop a strong workforce and talent development programs. Further, the pandemic revealed the need for collaboration, critical thinking, and an understanding of not only the drivers of a project but also the motivating factors of the local workforce.

Workforce and talent development is often discussed in general terms of aligning target industries to career programs and subsequent employment and retention numbers. That is all valuable and important information. The pandemic added to it by providing more charts and data points for communities and leaders to follow, such as job openings versus unemployment or labor force participation dips versus federal aid programs.

Before providing tactics for aligning education and workforce initiatives, the following two sections explore the national and the regional workforce environment, respectively.

The Great Resignation & Reprioritization

The economy added 210,000 jobs in November 2021 (the most recent data available), and the unemployment rate fell to a new pandemic low of 4.2 percent. During much of the pandemic, drops in the unemployment rate have been the result of people leaving the workforce because of public health concerns, child-care challenges, or retirement – not because of taking new employment.

In November, the participation rate, or the percentage of people either working or looking for work, rose to 61.8 percent of the overall workforce, its highest level since March 2020. Approximately 594,000 workers re-entered the labor force, 304,000 of whom were women. The only major racial group that lost workers in November was Black women, of whom approximately 91,000 left the labor force.

Researchers suggest that while expanded unemployment benefits ended in September 2021, many households have accumulated a cash cushion from a year and a half of savings—some of which is from unemployment benefits and other government programs. This is giving workers more flexibility if they want to put off returning to work or to be more selective about which job they return to.

Many workers have also suggested that their career priorities have changed, which has been reflected in the percentage of workers leaving their jobs. According to the U.S. Bureau of Labor Statistics (BLS) Jobs Openings and Labor Turnover report, the quit level and rate in November 2021 increased to a series high of 4.4 million and 3.0 percent, respectively. In order to develop a robust workforce with high retention rates, the new incentives that keep people in their position must be understood.

Unemployment versus Job Openings in the SARPC Region

While the previous data points reflect a national perspective, many regions across the country are witnessing similar trends. In interviews with stakeholders from human resource professionals to business leaders to education officials, each noted the desire of employees to have greater work/life flexibility, the challenges of online schooling / COVID outbreaks / childcare, and the consideration of pursuing additional education to change their career pathway.

This has transformed the hiring environment on a regional level. The following section provides high-level numbers on the state of the workforce in the SARPC Region, comparing job openings with the unemployment rate to determine the surplus or deficit of jobs in the Region. Figure 27 shows online job posting numbers for November-December 2021.

FIGURE 27: REAL-TIME JOB OPENINGS DATA

| Total Job Posts | Occupations | Locations | Employers | Certifications | Hard Skills | Soft Skills | Job Titles | Programs |
|-----------------|-------------|-----------|-----------|----------------|-------------|-------------|------------|----------|
| 15,803 | 582 | 1,315 | 3,714 | 233 | 1,208 | 103 | 9,562 | 220 |

Source: JobsEQ®. Online job postings active 11/06/2021–12/05/2021. Online job post numbers are from the Real-Time Intelligence (RTI) data set, produced by Chmura and drawn from forty thousand websites. Data is updated daily, and all ad counts represent deduplicated figures.

Figure 28 displays recent unemployment numbers, along with unemployment numbers prior to and during the pandemic. The low of 2.8 percent was recorded in December 2019. October 2021, the most recent data available, is the second-lowest unemployment rate in the timeframe presented.

FIGURE 28: UNEMPLOYMENT RATE SNAPSHOT

| Month | Rate | Month | Rate |
|----------------|-------|----------------|-------|
| January 2019 | 4.8% | June 2020 | 9.9% |
| February 2019 | 4.3% | July 2020 | 10.1% |
| March 2019 | 3.9% | August 2020 | 9.0% |
| April 2019 | 3.1% | September 2020 | 8.4% |
| May 2019 | 2.9% | October 2020 | 5.4% |
| June 2019 | 3.7% | November 2020 | 4.7% |
| July 2019 | 3.5% | December 2020 | 4.4% |
| August 2019 | 3.4% | January 2021 | 5.2% |
| September 2019 | 2.9% | February 2021 | 4.9% |
| October 2019 | 2.9% | March 2021 | 4.2% |
| November 2019 | 2.8% | April 2021 | 3.6% |
| December 2019 | 2.8% | May 2021 | 3.5% |
| January 2020 | 3.6% | June 2021 | 4.4% |
| February 2020 | 3.3% | July 2021 | 4.0% |
| March 2020 | 3.2% | August 2021 | 4.1% |
| April 2020 | 14.1% | September 2021 | 3.5% |
| May 2020 | 9.1% | October 2021 | 3.2% |

When the unemployment rate is converted into number of workers, it begins to create a clearer picture of the workforce environment. Figure 29 displays the number of those unemployed and looking for work by county: a total of about 9,600. When compared to the estimated 15,000 job openings in the Region, there is a difference of about 5,400 between those looking for work and the number of openings available to them.

FIGURE 29: OCTOBER 2021 UNEMPLOYMENT DATA

| Baldwin | Escambia | Mobile |
|---------|----------|--------|
| 2,156 | 439 | 7,033 |

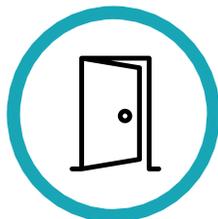
Source: Alabama Department of Labor: Civilian Labor Force by County – October 2021 Unemployment Data

Increasing Talent Alignment & Access »

Given the data, along with anecdotal feedback from stakeholders, VisionFirst suggests segmenting talent and workforce tactics into four categories: **Participation, Access, Retention and Training (PART)**. Using these categories enables the Region to identify and establish roles and metrics for success.



PARTICIPATION



ACCESS



RETENTION



TRAINING

In moving forward, the Region must also consider and align with State activities. A recent report by the Lumina Foundation noted Alabama's progress in workforce and education initiatives:

Alabama's approach is one that creates partnerships and connections to remove barriers for people who want to learn beyond high school. In today's economy, training and education beyond high school are critical to getting a high-wage, high-demand job. Removing barriers so that ALL Alabamians have access to training is a top priority for Governor Kay Ivey, and will lead to better jobs, better lives, and a reduction in poverty in our State.

Governor Ivey's Success Plus Plan has a goal of adding 500,000 credentialed workers to the workforce by 2025. Alabama's current post-secondary attainment rate is 45.1 percent, an increase of 13.25 percentage points since 2009 ... Removing barriers, collaborating with providers, and creating connections among public agencies is working and has Alabama on the path to meet the Success Plus goal.

Source: <https://alabamaworks.com/alabama-leading-in-helping-people-get-education-for-jobs/>

Using these goals and ongoing success, South Alabama can align its efforts to complement those already taking place at the State level. EDOs cannot, however, "own" the issue of workforce. They are facilitators and advocates. The Region has a strong network of organizations that should be a part of holistic solutions and individual programs and initiatives. The goal for EDOs is to align the efforts with target industries, support existing businesses, and provide support and advocate for programs and funding.

While not exhaustive, a list of workforce and education partners who should collaborate in implementing and measuring the tactics includes:

-
- | | |
|--|--|
| • South Alabama Regional Planning Commission (SARPC) | • Southwest Alabama Partnership for Training and Employment (SWAPTE) |
| • Baldwin Economic Development Alliance | • Alabama Industrial Development Training (AIDT) |
| • Escambia County Industrial Development Authority | • University of South Alabama |
| • The Mobile Area Chamber of Commerce | • Coastal Alabama Community College (CACC) |
| • South Alabama Works Development Commission (SAWDC) | • Bishop State Community College |
-

Utilizing the boards and existing task forces, the organizations should consider the implementation of the following tactics.

Participation »

People who are out of the labor force have a lower probability of transitioning into employment than those who are unemployed, and their return to the labor force often lags overall improvement in the economy. According to [Brookings](#), this occurs for many reasons, including because people who are out of the labor force make commitments that keep them out of the labor force (e.g., deciding to stay home until a child starts school or entering school themselves), because employers may be reluctant to hire those with gaps in their employment history, and because the personal networks of those out of the workforce may weaken.

Using the latest available data from the U.S. Census there are sizable gaps in prime-age participation across groups in the United States: women participate at a rate that is approximately 10 percent lower than men (with Escambia County as the exception), and adults 25–64 without high school degrees participate in the workforce at a rate that is more than 26 percent lower than adults with at least a college degree. Those with family caregiving responsibilities, facing health and disability challenges, or with a history of incarceration are all far less likely to work than other adults.

The data in Figure 30, collected from Census Table S2301, indicates that the SARPC Region's workforce closely mirrors that of the State and the nation. *(Due to the impact of the COVID-19 pandemic, the Census Bureau changed the 2020 American Community Survey (ACS) release. Instead of providing the standard 1-year data products, the Census Bureau released experimental estimates from the 1-year data.)*

FIGURE 30: 2020 U.S. CENSUS EMPLOYMENT STATUS

| | United States | Alabama | Baldwin County | Escambia County | Mobile County |
|---|---------------|---------|----------------|-----------------|---------------|
| Population 16 years and over | 63.4% | 57.6% | 58.3% | 47.3% | 57.0% |
| 25 to 29 years | 83.3% | 79.3% | 82.7% | 64.3% | 76.8% |
| 30 to 34 years | 83.2% | 80.0% | 80.1% | 67.3% | 80.5% |
| 35 to 44 years | 82.9% | 78.6% | 83.1% | 60.9% | 78.7% |
| 45 to 54 years | 81.1% | 74.9% | 79.7% | 61.2% | 72.3% |
| RACE AND HISPANIC OR LATINO ORIGIN | | | | | |
| White alone | 62.8% | 57.2% | 57.9% | 47.9% | 57.2% |
| Black or African American alone | 63.0% | 57.5% | 62.3% | 43.9% | 55.7% |
| American Indian and Alaska Native alone | 58.0% | 56.4% | 38.4% | 59.2% | 59.2% |
| Asian alone | 65.6% | 65.4% | 68.1% | 87.4% | 66.2% |

| | | | | | |
|---|-------|-------|--------|--------|--------|
| Native Hawaiian and Other Pacific Islander alone | 66.4% | 50.8% | 100.0% | 100.0% | 85.2% |
| Some other race alone | 67.6% | 66.5% | 67.2% | 98.4% | 59.7% |
| Two or more races | 68.0% | 60.2% | 55.6% | 43.7% | 60.4% |
| Hispanic or Latino origin (of any race) | 67.7% | 65.8% | 69.7% | 63.0% | 63.5% |
| White alone, not Hispanic or Latino | 62.1% | 57.0% | 57.8% | 47.4% | 57.0% |
| Population 20 to 64 years | 77.9% | 72.0% | 75.1% | 59.9% | 70.9% |
| SEX | | | | | |
| Male | 82.5% | 77.2% | 80.6% | 55.9% | 76.20% |
| Female | 73.4% | 67.0% | 70.0% | 64.7% | 66.0% |
| With own children under 18 years | 74.3% | 73.0% | 76.1% | 70.0% | 71.2% |
| With own children under 6 years only | 72.2% | 71.4% | 71.8% | 83.2% | 65.4% |
| With own children under 6 years and 6 to 17 years | 66.4% | 66.3% | 63.5% | 62.1% | 65.6% |
| With own children 6 to 17 years only | 78.0% | 75.8% | 81.5% | 67.0% | 75.7% |
| POVERTY STATUS IN THE PAST 12 MONTHS | | | | | |
| Below poverty level | 47.8% | 42.5% | 41.0% | 47.2% | 41.0% |
| At or above the poverty level | 83.2% | 78.5% | 79.5% | 75.4% | 77.5% |
| DISABILITY STATUS | | | | | |
| With any disability | 43.4% | 34.7% | 38.5% | 30.8% | 33.5% |
| EDUCATIONAL ATTAINMENT | | | | | |
| Population 25 to 64 years | 78.3% | 72.1% | 74.9% | 58.6% | 71.3% |
| Less than high school graduate | 60.7% | 49.1% | 57.1% | 35.6% | 50.8% |
| High school graduate (includes equivalency) | 72.4% | 66.3% | 71.1% | 53.9% | 65.8% |
| Some college or associate's degree | 79.5% | 75.4% | 74.2% | 72.6% | 73.3% |
| Bachelor's degree or higher | 86.9% | 84.4% | 83.5% | 80.3% | 85.6% |

To build a strong economy as well as added resiliency in the face of the pandemic, **pursue closing the participation gaps among key demographic groups: women, people below the poverty level, and those with lower educational attainment.** Many communities have also found success **engaging those with prior criminal records and people with disabilities.** By focusing efforts on smaller segments of the population, tactics can be more specific, correspond more with the audience’s needs, and more effectively remove barriers to entry.

Tactic: Host Quarterly Regional Education & Industry Roundtables
(Short-Term)

While the data offered in the plan presents a snapshot of current workforce dynamics, only through ongoing dialogue can a more accurate, comprehensive picture be presented. As noted earlier, a host of agencies and organizations engage in workforce programming on the local level. It is critical to collaborate and not duplicate efforts.

Organize strategy sessions between SAWDC, K-12 and post-secondary institutions, and industry partners to devise a plan on how to work together to increase talent availability and participation. The roundtables should collaborate with employers, educators, and job training programs to offer an information exchange and build relationships to ensure students are receiving the education and relevant training that will prepare them to be successful in industries in the Region. Key metrics and timelines should be identified during the discussion.

Tactic: Engage Women in Manufacturing and STEP *(Mid-Term)*

Throughout the pandemic, women have felt the hardship of job loss and negative career impacts due to a host of factors, including carrying the weight of caregiving responsibilities and their over-representation in in-person jobs vulnerable to disruption during the crisis, as shown in Figure 31.

FIGURE 31: INDUSTRY SECTORS WITH HIGH PERCENT OF FEMALE EMPLOYEES & GREATER LOSS OF JOBS

| Sector | Female % Total Sector Employment | |
|---|----------------------------------|--------|
| | 2019Q4 | 2020Q2 |
| Health Care and Social Assistance | 78.1 | 77.8 |
| Educational Services | 62.7 | 62.6 |
| Finance and Insurance | 58.7 | 58.7 |
| Accommodation and Food Services | 53.9 | 53.4 |
| Other Services (except Public Administration) | 52.5 | 50.4 |

According to a [recent survey from MetLife](#), nearly half of women (48 percent) said the pandemic has negatively impacted their careers, and almost two in three (63 percent) who left the workforce during this period say they are ready to return. Eight in ten of those are considering careers in science, technology, engineering, and mathematics (STEM). The responses showed women interested in STEM identify several factors that would encourage them to pursue a career in those fields:

- More diversity, equity, and inclusion in the leadership pipeline (38 percent)
- Benefits that better fit their needs (33 percent)
- More flexibility in work arrangements (31 percent)
- Dedicated trainings that help their career progression (30 percent)
- Paid internships or apprenticeships (29 percent)
- Employee resource groups (28 percent)

Pursue avenues that actively engage women in the workforce regarding opportunities in Manufacturing. According to the [2020 Women in Manufacturing Benchmark Study](#), women constitute one of the U.S. manufacturing industry's largest pools of untapped talent. Nationally, women currently fill only 33 percent of manufacturing industry jobs and 26 percent of industry leadership positions. Within the SARPC Region, women fill about 25 percent of Manufacturing occupations.

Considering the recent separations—largely due to COVID and especially in retail, accommodation and food services, and administration and support—a regional approach should be spearheaded in an effort to leverage this intellectual capital into a campaign that celebrates and encourages women to pursue careers in Manufacturing. A national movement, Science, Technology, Engineering, and Production (STEP), could be adopted on a regional level.

The benchmark study recommends that companies consider:

- **Acting on benefit differences** – Transportation/commuting allowance (73 percent of women and 55 percent of men), flexible work schedule (28 percent of women and 22 percent of men), and tuition reimbursement (23 percent of women and 42 percent of men).
- **Providing family benefits** – On-site childcare (93 percent of women and 86 percent of men), paid paternity leave (38 percent of women and 36 percent of men), and paid family medical leave (38 percent of women and 36 percent of men).
- **Increasing mentorship opportunities** – Second only to associations, 27 percent of women found mentorships as a helpful resource. Only 43 percent of women, however, have a mentor.

- **Leveraging novel recruitment techniques** – Instead of relying on traditional hiring practices, use association memberships or other network opportunities to identify qualified female candidates.

Best Practice: [West Virginia Women Work](#) was founded to help women train and secure employment in nontraditional occupations, especially the skilled trades. The program has achieved an 80 percent job placement rate with new graduates, who earn a minimum of \$3 more per hour than a traditional job.

Tactic: Grow the Labor Force by Utilizing Untapped Talent (Mid-Term)

Educate veterans on in-demand workforce opportunities. The SARPC Regional Laborshed is home to 95,518 veterans (ages 18–62). A 2019 [survey](#) by the Pew Research Center, however, found that 45 percent of veterans say that “the military prepared them ‘not well at all’ or ‘not too well’ for the transition to civilian life.” Despite the difficulty of transitioning into civilian life, data indicates that there is a strong need for veterans in the workforce, as many have in-demand skills and experience.

The military gives veterans hard skills that can be difficult to find in the civilian workforce, especially in the current market. Veterans often find work in Construction because of their teamwork and fitness qualities, as well as Manufacturing due to their experience working on equipment or vehicle repair. Truck Driving and Transportation are also common occupations for veterans as many ex-military personnel have experience working long or odd hours associated with related occupations.

Advocate for workforce re-entry programs. According to a 2017 report, seventy million Americans—one in three adults—have a criminal record. Because of the stigma associated with having a criminal record, nearly 75 percent of formerly incarcerated individuals remain unemployed a year after release. In conversations with both employers and temporary hiring agencies, the topic of hiring formerly incarcerated persons was mentioned. Over the last decade, many employers have “banned the box” that asks about an applicant’s criminal record; instead, they are delaying criminal history inquiries until later in the hiring process, when any history can be considered in a job-related context.

Understanding the need to find skilled employees, along with the desire to prevent [recidivism](#), EDOs can serve as a workforce advocate to encourage SAWDC to develop programming in conjunction with the Department of Corrections to add workforce training in high-demand industries prior to an individual’s release.

In addition, SAWDC and educational organizations should partner with local nonprofits to ensure residents are aware of Alabama’s expungement law, the Record Expungement Designed to Enhance Employment and Eliminate Recidivism Act; the REDEEMER Act allows for the expungement of criminal convictions of certain misdemeanor offenses, traffic

violations, municipal ordinances, and felony offenses, making formerly incarcerated individuals more eligible to be hired.

Best Practice: Recognizing the challenges that those released from jail face in re-entering the workforce and earning a living wage, the Walton County Sheriff's Office created **Developing Resilient Individuals for a Vibrant Economy (DRIVE)**, a holistic approach to more effectively dealing with the factors resulting in an inmate's incarceration. In addition to providing evidence-based therapies for substance abuse treatment, including opioid addiction, the Walton County Sheriff's Office has invested substantially in education for incarcerated individuals by partnering with local education institutions to offer GED® programs, introductory welding programs, heavy equipment operations education, and OSHA 10 training and certification to better equip incarcerated individuals for post-release life in their local communities. Along with these pre-release interventions, the Walton County Sheriff's Office has established post-release opportunity scholarships to encourage the continuation of training programs already begun.

Facilitate job opportunities for people with disabilities. The labor force participation rate of people with disabilities is roughly 36 percent. Companies have created partnerships with State organizations to identify successful recruiting tactics that create a more inclusive workforce while integrating a relatively untapped portion of the population. Working with local workforce partners and the Alabama Department of Rehabilitation Services Business Relations Consultant (BRC), the EDOs should work to customize recruitment efforts, creating a bridge between businesses and the disability communities. These efforts will promote diversity in the workforce by enabling the recruitment and retention of individuals with disabilities, while also filling the employer need for an expanded workforce.

Best Practice: To explore new workforce solutions, Mississippi's **Madison County Economic Development Authority connected Fastenal with the Mississippi Department of Rehabilitation Services (MDRS)**. MDRS is a State agency that provides resources to help Mississippians with disabilities find new careers, live more independently, overcome obstacles, and face new challenges. Through the Office of Business Development, MDRS recruited, referred, and prescreened qualified applicants that could support Fastenal's needs—at no cost to the company. Through utilizing MDRS's services, Fastenal has been able to add nearly a dozen employees to their workforce base. The MDRS employees have been a critical addition to the Madison County Fastenal facility, serving in picking and sorting positions as well as forklift operations. As a result of their hiring, turnover rates are lower, productivity has increased, and some of the new employees have earned promotions.

Access »

The pandemic opened the door for many workers to reconsider their career pathways. The State and federal government created programs to grant nontraditional college students access to low- or no-cost higher education programs. But the higher education system does not always align with the needs of a working adult with financial and family commitments. The American Institutes for Research analysis of “adult promise” programs, which included statewide and institution-based offerings, found numerous requirements that conflicted with the needs of many adult students.

Adults may have jobs, child care concerns, questions about past credits, loan defaults in their credit history, or anxiety about returning to school, [according to Laura Perna](#), executive director of the Alliance for Higher Education and Democracy at the University of Pennsylvania. “There is a complexity to adult learners,” said Perna. Programs to serve them must consider finances, schedules, and supports—everything that needs to be done to make it possible for adult learners to attend.

Nearly 35 million adults nationwide have some college experience but no degree; more than 73,000 of them live in the SARPC Region. Another 103,000 people in the SARPC Region have only a high school diploma. Partners in the Region should work with higher educational institutions (specifically Coastal Alabama Community College and Bishop State Community College) to consider how to reach these potential students.

Tactic: Support Adult Learners in Higher Education *(Long-Term)*

According to the American Council on Education, college students over the age of 25 are often overlooked in efforts to increase student success. Yet these adult learners make up more than one-third of all undergraduate students, with Black or African American, Native Hawaiian or other Pacific Islander, and American Indian or Alaska Native undergraduate students enrolling at higher rates as adult learners than other ethnic groups.

Adult learners tend to enroll in education part time (52.0 percent), and more than half (51.5 percent) attend public two-year institutions. Adult learners often maintain jobs as they complete coursework, with slightly less than half (44.0 percent) working full time and another one-fourth (24.3 percent) working part time.

Understanding that adult learners or nontraditional students have different needs and expectations and face different barriers to higher education access, regional partners should encourage local education institutions to implement programs and initiatives that encourage entry into and completion of college by these students.

Local higher education institutions should implement best practices that support adult learners, such as:

- Supportive services, including childcare and transportation
- Professional networks and peer support
- Course time flexibility
- Financial aid and support offices with nontraditional hours so students with full-time jobs can still receive assistance
- A course in which students create a portfolio of prior experience that allows the student to earn credits to apply to their degree
- Adult education recruiters who attend college fairs to reach parents that attend the fairs with their high schoolers

[Recent research](#) estimates that 71 million Americans have the right skills for higher-wage jobs but are unable to enter those roles because they lack four-year degrees. In the U.S., individuals without a college degree are disproportionately African American and Hispanic.

Competency-based and requiring less time and a lower investment than a conventional degree, credential courses aim to solve that problem by matching skills with evolving hiring needs. Credentials can also “stack” over time to earn degrees. This approach has the potential to be significantly more inclusive while broadening the talent pipeline.

According to the Business-Higher Education Forum, enrollment in short-term credential classes increased 70 percent from 2019 to 2020. Providing credential courses online or on weekends and in the evenings can also enable access for under-represented students who are balancing family obligations, reskilling for a new career, or are veterans.

[EMSI](#) suggests the following five additional strategies for encouraging residents to enroll in education opportunities:

- Embed current, relevant career data directly on high-traffic platforms and webpages.
- Facilitate career exploration that connects future learners with academic programs.
- Help learners identify and fill their skill gaps.
- Highlight real employment outcomes of past students.
- Highlight the return on investment of a certificate or degree.

Best Practice: Housed within the Office of Adult Students and Evening Services (OASES), the **49er Finish Program** recruits former UNC Charlotte students to return to school, then supports them in achieving their academic goals. A central component of the program is personalized academic advising. The advisors are trained to assist adult and nontraditional students, working with each student to develop and implement plans for achieving their goals. The program focuses on completion, persistence, and retention by using tactics specific to adult learners such as wraparound services, counseling, and financial advising.

Tactic: Advocate for Credit for Prior Learning Programs (Mid-Term)

In addition to encouraging adult learners to enter college, it is important to recognize the skills these prospective students may have already earned by being in the workforce. Utilizing what a student has already learned can save time and money and encourage completion of a degree program. Considering a student's ability to demonstrate proficiency through prior work experience, area colleges should consider Credit for Prior Learning (CPL) (also known as Prior Learning Assessment (PLA) or Recognition of Prior Learning).

CPL describes various methods that colleges, universities, and other education/training providers use to evaluate and formally recognize learning that has occurred outside of the traditional academic environment. In addition to traditional work experience, colleges and universities also consider military experience and professional training. This experience or training is used to grant college credit, certification, or advanced standing toward further education or training. CPL programs move adults into jobs more quickly, increase advancement opportunities once on the job, and support learners' continuing education without sacrificing academic rigor by the college or university.

While a student may be able to demonstrate competency in a specific workforce skill based on past experience, they may still lack the underlying college coursework. *Jobs for the Future* defines underprepared college learners as individuals who enter postsecondary education without college-level skills in at least one foundational area: reading, writing, or math. About 2.4 million new community college students each year—60 percent—are required to take at least one remedial course in English or math before starting college-level coursework. Only 28 percent of these students earn a credential within eight years. When considering a CPL program, area colleges should also consider the potential remedial needs of students who take advantage of the program.

Best Practice: Virginia's community colleges recently launched an expanded version of the [Credits2Careers Portal](#), enabling more adult learners to be aware that they may be eligible for college credit based on their prior learning and experience. Before the expansion, the Credits2Careers portal only served individuals with military experience, translating their service into college credits. The expansion of the portal, which is the result of a grant from the Lumina Foundation, includes statewide curriculum crosswalking. This has enabled Virginia's community colleges to correlate military training, professional development, and workforce and career certifications to courses within its course catalog, enabling adult learners to jumpstart their path to a college degree by granting college credit for specific life experiences.

Retention »

The focus on employment is often on attraction, while retention goes overlooked. Americans have been leaving their jobs at unprecedented levels during the pandemic, meaning that focus must be shifted. While companies must recalibrate their strategies toward retaining talent, communities play a large part in the retention of talent as well. Unless the Region can retain the talent that local employers need, it does not matter how many new businesses and industries are recruited to the Region.

[Studies show](#) that 35 percent of current employees who are looking for new opportunities are seeking better compensation. Beyond compensation and benefits, employees are asking themselves if they want to remain not only in their current job but also in their current community. Choosing to stay depends on many factors, including:

- Are they engaged in local activities and events?
- Do they belong to area organizations?
- Are they happy with local amenities?
- Do they feel like the school system supports their family?

Over the last five years, the SARPC Region has seen a steady increase in domestic migration and a significant drop-off in international migration. Birth rates versus death rates remained steady until 2020, when death rates were likely impacted by the pandemic.

FIGURE 32: SARPC REGION MIGRATION AND POPULATION RATES

| Year | Net Domestic Migration | Net International Migration | One-Year Change in Population | One-Year % Change in Population | Birth Rate | Death Rate | Population |
|------|------------------------|-----------------------------|-------------------------------|---------------------------------|------------|------------|------------|
| 2015 | 1,672 | 781 | 4,078 | 0.6 | 12.7 | 10.3 | 655,431 |
| 2016 | 2,711 | 806 | 5,025 | 0.8 | 12.7 | 10.4 | 660,456 |
| 2017 | 1,731 | 484 | 3,500 | 0.5 | 12.5 | 10.6 | 663,956 |
| 2018 | 3,210 | 537 | 4,905 | 0.7 | 12.5 | 10.8 | 668,861 |
| 2019 | 3,789 | 304 | 4,789 | 0.7 | 12.1 | 11.1 | 673,650 |
| 2020 | 4,273 | 290 | 4,634 | 0.7 | 12.0 | 11.9 | 678,284 |

Migration refers to moves that cross a boundary, such as a County or state line, and is either domestic migration (movement within the U.S.) or international migration (movement between the U.S. and other countries).

Tactic: Engage Young Professionals through Volunteerism (Mid-Term)

There are more than 25,000 students enrolled in area colleges and approximately 85,000 residents ages 25–34 living in the SARPC Region. Given the number of prospective graduates and young professionals, the Region should seek to engage this demographic in the community. Young talent wants to feel actively connected to their community, and the more engaged they are, the less likely they are to leave their job or the Region.

One way to connect them to their community is through volunteering and nonprofit leadership. Businesses have begun offering “volunteer time off” (VTO) to attract and retain employees. VTO is paid time off in addition to sick and vacation time that may be used to participate in community service or charity efforts. Offering VTO has recently gained popularity, especially with the millennial and Gen Z workforce cohorts, who generally believe in allocating time to give back to others.

VTO can help attract and retain talent while also allowing a business to demonstrate its commitment to the Region. According to the Society for Human Resource Management’s 2019 Employee Benefits Survey, only 26 percent of employers allow employees to take paid time off to volunteer. In Deloitte’s 2017 Volunteerism Survey, nearly 70 percent of employees said they are not volunteering as much as they would like to, with nearly two-thirds of respondents attributing this to the fact that they do not have the time during the day to volunteer. VTO gives employees an opportunity to give back to their community and enables an employer to stand out from the competition.

Coordinate with regional employers to explore the implementation of VTO policies while also showcasing volunteer opportunities in the community. The combination of both efforts will promote employee retention for the employer as well as in the Region.

Best Practice: [IndyHub](#) represents and advocates on behalf of the largest network of people ages 21–39 in Indianapolis. Its mission is to grow, engage, and empower its community who are meaningfully connected to Indy and invested in its future. One specific initiative is [IndyVolved](#). Now in its sixteenth year, the volunteer event features more than 100 local nonprofits and civic organizations showcasing ways for Indianapolis’s young leaders to volunteer, serve on boards and committees, join organizations as ambassadors, and ultimately make a difference in their city.

Tactic: Partner in Initiatives to Attract Boomerang Talent (Mid-Term)

Each year, thousands of students within the Region are graduating and making the decision to stay or leave. Meanwhile, colleges and university communities are constantly seeking ways to retain graduates and lure alumni back to their college towns. How the Region engages students over the course of their education plays a large role in their ultimate choice.

A recent State report noted that a majority of Alabama public higher education institution graduates (57 percent) remain in Alabama. Five years after graduation, 51 percent of 2013 bachelor's degree recipients were employed in Alabama; more certificate (65 percent) and associate degree (71 percent) recipients remained in Alabama, while fewer master's (47 percent), doctoral research/other (29 percent) and doctoral professional (39 percent) graduates remained.

While those numbers are strong, there is work to be done at both the State and local level. A current proposal earmarks \$800,000 for a new Retain Alabama initiative to introduce college students to opportunities in the State. There are also partnership opportunities that can take place at the regional level to expose students to what the Mobile Region has to offer while also promoting the Region to alumni of local colleges and universities.

Partner on initiatives that support the retention of college graduates and engage area alumni. Initiative opportunities include:

- Providing a recruitment service to partner graduates with local small- and medium-sized businesses.
- Enlisting the support of colleges and universities to develop a short list of graduate candidates (two or three) for recommendation to the business owner.
- Providing an aftercare service to graduates and businesses to ensure both parties are satisfied.
- Offering concierge services to alumni of local colleges and universities as well as those who grew up in the Region to help them consider or reconsider the area.
- Developing a panel of success stories of those who moved away and came back and/or graduates that stayed that demonstrates the reasons the Region is a great place to live and work.

Best Practice: Two Greensboro Chamber of Commerce's initiatives, [Boomerang Greensboro](#) and [Campus Greensboro](#), aim to lure alumni back to the area and help retain college graduates in the area, respectively. The initiatives utilize targeted marketing, data, and public-private partnerships along with foundation grants to support the initiatives.

Tactic: Support Development of Business Retention Efforts (Mid-Term)

Employers are struggling to find skilled workers, while graduates are finding it equally difficult to meet the eligibility criteria for even entry-level jobs. While universities and colleges are providing students with a well-rounded education, they are not able to keep pace with changes in business. Employers are exploring more proactive approaches to closing the skills gap and achieve the necessary talent benchmarks, all while retaining and upskilling employees.

To offer new skills while investing in employees, **workforce partners should facilitate business roundtables to explore and adopt best practices**, including:

- Making continuous learning a part of the talent development program. Given the current talent shortage crisis, organizations can no longer rely on the event-based training model. Employers must provide learning opportunities continuously instead of offering yearly sessions or project-specific courses.
- Offering incentivized learning tracks. Despite being interested in obtaining a new skill, employees often struggle to find time for additional activities. Employers can encourage learning and development adoption by offering a variety of incentives and rewards or even by linking it to performance reviews.
- Implementing guided programs. Mentorship, apprenticeship, and internship programs create a transition period where job seekers can familiarize themselves with the skills they need to succeed in a particular job. A degree can offer the foundation of a career, but job-specific skills are often best learned through such programs.
- Partnering with specialists to reskill and upskill the workforce. In-house employee development programs are sometimes feasible but are not often so for a smaller organization with limited resources, time, or competency. Organizations can partner with a third party to aid in upskilling.

Training »

Manufacturing continues to be a targeted industry, and Manufacturing companies have successfully leveraged the Region's assets, location, business policies, and talent. In order for the SARPC Region to maintain its position as a location of choice, training and education programs will need to be developed, refined, and supported.

The struggle to fill jobs in advanced manufacturing continues in part due to skills shortages prompted by the rise of new tech combined with the ongoing retirement of a large portion of the industry's employee base. A report by the U.S. Department of Labor estimates that by 2025, 3.5 million new jobs will open in Manufacturing; 2.7 million of those jobs will have been created by baby boomer retirements—and 2 million of those vacancies will go unfilled.

State-level alignment of training and industry needs is underway, with the Governor's Office of Education and Workforce Transformation's survey working to identify the occupational characteristics of the most in-demand jobs in Alabama. The survey asks employers to provide information about high-demand occupations and occupations that are the most difficult to find qualified workers to fill. In addition, it seeks employers' comments on any education, licenses, credentials, or competencies required.

Some employees enter the workforce lacking the appropriate skills required to be successful at their job. Training and the development of their skills as well as those of all other employees is vital to sustaining business growth and success. While training and education offers an opportunity to expand the knowledge base of employees, companies often find training to be expensive and employees often face time constraints, both professionally and personally.

The pandemic has underscored the need to identify short-term trainings and programs that allows employers to fill positions while offering job opportunities to residents. However, until employees receive that training, a gap remains between their current skills and those required to fill open high-wage positions advertised by employers.

A skill gap is defined as the difference between the supply of and the demand for a skill. Figures 33 and 34 display the current gaps in hard skills and certificates in Manufacturing in the SARPC Region.

FIGURE 33: HARD SKILL GAPS (TOP AND BOTTOM 10) IN MANUFACTURING (CTE CLUSTER)

| Skill | Candidates | Openings | Gap |
|---------------------------------|------------|----------|-----|
| Hydraulic Lifts | 1 | 30 | -29 |
| Personal Computers (PC) | 32 | 53 | -21 |
| Maintenance | 61 | 79 | -18 |
| Automotive Maintenance / Repair | 31 | 48 | -17 |
| Pallet Jacks | 17 | 33 | -16 |
| Aviation | 4 | 17 | -14 |
| Plumbing | 117 | 129 | -12 |
| Sales | 7 | 19 | -12 |
| Microsoft Outlook | 54 | 66 | -12 |
| Forming Machines | 1 | 12 | -11 |
| Assembly | 47 | 36 | 12 |
| Gauges | 98 | 86 | 12 |
| Overhead Cranes | 31 | 18 | 13 |
| Rulers | 32 | 18 | 14 |
| Hand Tools | 90 | 75 | 15 |
| Pneumatic Systems | 35 | 18 | 17 |
| Hydraulic Systems | 35 | 16 | 19 |
| Mechanical | 166 | 144 | 22 |
| Welding | 183 | 155 | 28 |

FIGURE 34: CERTIFICATE GAPS (TOP AND BOTTOM 10) MANUFACTURING (CTE CLUSTER)

| Skill | Candidates | Openings | Gap |
|---|------------|----------|-----|
| Secret Clearance | 9 | 13 | -4 |
| Certified Professional in Supply Management (CPSM) | 0 | 2 | -2 |
| Certified Quality Auditor (CQA) | 0 | 2 | -2 |
| Certified Supply Chain Professional (CSCP) | 0 | 2 | -1 |
| API 653 – Aboveground Storage Tanks Inspector Certification | 0 | 1 | -1 |
| Certified Quality Engineer (CQE) | 0 | 1 | -1 |
| EPA Section 608 Certification (EPA 608) | 5 | 6 | -1 |
| Project Management Professional (PMP) | 0 | 1 | -1 |
| IPC-A-610 – Acceptability of Electronic Assemblies | 0 | 1 | -1 |
| Certified Purchasing Professional (CPP) | 0 | 1 | -1 |
| HAZMAT | 3 | 1 | 1 |
| API 1169 – Pipeline Inspector | 1 | 0 | 1 |

| Skill | Candidates | Openings | Gap |
|---|------------|----------|-----|
| National Center for Construction Education & Research Certification (NCCER) | 2 | 1 | 1 |
| Certified Pool/Spa Operator (CPO) | 2 | 1 | 2 |
| Commercial Driver's License - Class A (CDL-A) | 4 | 2 | 2 |
| Transportation Worker Identification Credential (TWIC) | 5 | 3 | 2 |
| Forklift Certification | 7 | 5 | 3 |
| Certified Welding Inspector (CWI) | 6 | 1 | 5 |
| Commercial Driver's License (CDL) | 8 | 3 | 5 |

Openings and candidates are based on regional occupation demand (growth plus separations) and the percent of skill demand and supply.

According to the National Skills Coalition, 53 percent of U.S. jobs are middle skill, meaning that they require some form of postsecondary education but not a four-year degree. Only 43 percent of U.S. workers are trained at this level, though. This means businesses cannot find the skilled workforce they need and millions of low-skilled, low-wage workers cannot fill these better-paying positions because they lack the required training.

Prior to developing or advocating for new training programs, it is critical to better understand what is available, what is needed, and how to better promote training offerings to residents.

Tactic: Develop Regional Workforce Survey (Short-Term)

Industries pay little attention to jurisdiction lines; they are more interested in a region's workforce density and skill set availability. The same should hold true for the SAPRC Region as it pertains to assessing and evaluating the Region's labor shed. **Conduct a regional workforce survey that includes details on wages and benefits.** The survey will provide hyper-local data as compared to the State-level survey, and it will enable regional partners to refine trainings, identify the need for new certifications, and develop work-based learning programs.

Tactic: Advocate for the Use of Labor Market Outcome Data to Inform Credentials (Mid-Term)

According to a 2019 Fordham Institute study, "Over the last few decades, Americans have become less mobile, and most adults—especially those with less education or lower incomes—do not venture far from their hometowns...the median distance Americans live from their mother is eighteen miles." If young people are not moving far from home, then their hometowns need to prepare them to succeed at local colleges and in their careers. That makes it more important than ever that high school career and technical education (CTE) programs mesh with real-world job opportunities in their own and nearby

communities. Each of the Counties has strong CTE programs and academies – with nearly 50 areas of study - appealing to a wide range of industries. The programs should be highlighted on websites throughout the Region not just on the school district sites to demonstrate to businesses, potential projects and new residents the education possibilities available in the Region.

Offering a variety of credentials and certificates to students to advance their careers is just the first step in building a workforce for the Region’s industries. It is also critical to gather data about placement and earnings. **Colleges should track labor market outcomes for programs and consult data on debt and earnings** from the U.S. Department of Education’s College Scorecard. They can then use that data to update curriculum and work with employers to ensure programs align with workforce needs.

Tactic: Facilitate Workforce Partner Website Improvements

(Mid-Term)

When businesses are considering an expansion project, communities are often considered against project drivers such as sites, infrastructure, costs, and now more than ever, talent. College websites, however, are focused on students, prospective students, and alumni to encourage donations. Few educational institutions, even those dedicated to career and technical training, promote their partnerships with business and industry, resulting in much of the community’s story going untold. For example, despite being the major suppliers of technical training awards—nearly 2,000 annually—neither Coastal Alabama nor Bishop State currently have information targeted toward businesses on their sites.

Coordinate with Coastal Alabama and Bishop State community colleges to improve their websites by highlighting how the colleges work with businesses to customize training, the programs that serve businesses, data on placement and retention, and success stories. Using college websites to promote the South Alabama Region as a supplier of skilled, reliable talent is a cost-effective way of enabling the Region to improve its competitive advantage. [Texarkana College](#) is a best practice that could be easily replicated in the Region.

2. Evaluate & Revise the Incentive Toolbox

A well-established understanding of a community's and a region's expectations and vision for the future is vital when developing and adopting an incentives policy. Interviews conducted by VisionFirst indicated consensus that economic development success in the Region includes:

- continued growth in targeted industry sectors that leverage regional assets;
- expansion of existing businesses;
- new private capital investment;
- support of entrepreneurs and business formation efforts; and
- businesses that reflect higher wages in their payroll.

The goal of an effective economic development entity should be to attract industries that will meet these objectives by aligning workforce training, utilizing available assets, and creating an environment conducive to attracting capital investment. This success will not happen without an aggressive, flexible incentive toolkit. Many companies that are considering a new location will eliminate communities based on desktop research that evaluates site availability, workforce availability, the State and local business tax environment, and—especially—the availability and quality of local incentives.

The importance of financial incentives cannot be denied, but it is important to tailor incentives to fit the business. **Most communities with successful economic development programs have developed a toolbox of incentives that are judiciously offered based on the specific interests and concerns of the company rather than via a one-size-fits-all approach.**

In the current market, it is critical to consider how the pandemic shifted the priority and use of incentives. According to [Area Development](#):

A healthy incentive program has enough flexibility to evaluate each project and its inputs on a case-by-case basis, and the ability to view a project's return on investment on more than just number of jobs created and/or average wage . . . The incentive programs of twenty years ago do not work with the ever-changing global economy in which we live. States and communities must be true partners and offer flexible programs to support projects of all shapes and sizes.

With that in mind, an effective incentive program must be designed to meet the goals identified, with an efficient application and compliance process. A robust incentives approach will ensure that each company's commitments are met prior to public funds being expended and will allow for transparent reporting to assess whether the incentive tools are generating the desired effect.

It is important to first define the types of local incentives, both financial and non-financial. Each of these components may be project drivers, and local assistance in understanding and securing appropriate incentives cannot be undervalued.

- Fast-track permitting
- Assistance navigating all local governmental requirements (such as zoning, mobility fees, or public infrastructure needs)
- Grants for public infrastructure
- Property and sales tax abatements
- Free or discounted sites
- Other grants directly to the company
- Workforce training assistance and funding

As demonstrated throughout the research, each of the three Counties within the South Alabama Region has unique drivers. Interviews with the EDOs verified that all have strong economic development leadership. But it is evident that significant differences exist related to industrial targets, county structures, and incentive strategies. For this reason, a summary of each county's incentives is provided, along with opportunities for improvement.

Baldwin County »

Baldwin County is a renowned tourism destination, and much of the County's economy and investment has been built around this industry. Baldwin has also made a significant investment in their Mega Site, and both the EDO and County leadership are committed to recruiting an industry to this unique location. For a preferred candidate, the County is prepared to provide a premium incentive package, including land, tax abatements, and other incentives customized to the candidate's needs.

Aside from the Mega Site, Baldwin County is strongly driven by Retail and Hospitality, and has identified Aerospace, Advanced Manufacturing, Technology, and Office Operations as their primary targeted industries. They have specific interest in building technology and entrepreneurial companies as indicated by their investment in Hatch, their business resource hub for technology-based entrepreneurs.

According to the Baldwin County Economic Development Alliance (BCEDA), each of the cities and the County are prepared to provide standard tax abatements and potentially other local incentives based on jobs and investment commitments. While no incentive policy is published, there is precedent that shows the County supports economic development.

Baldwin County Incentive Improvement Tactics (Mid-Term)

- **Continue an entrepreneurship incentive.** BCEDA should work directly with State universities to provide mentorship, technical assistance, and space at the Hatch as tools to succeed. Additionally, it should consider creating a small entrepreneur grant program. Each potential entrepreneur would submit a business concept paper to BCEDA and be invited to give a ten-minute pitch to the Alliance board. If the group sees merit in the pitch, the entrepreneur will qualify for a \$1,000 grant to assist with business plan development, product development, prototyping and testing, and further refinement of the project to get to the point that the project can find venture capital.
- **Place greater emphasis on gross wages than on number of jobs created.** BCEDA has historically used number of jobs as its primary metric when determining incentives. With the national workforce shortage, the County should consider incentivizing projects with fewer new jobs but higher gross wages. This will help raise the average wage for the County without placing more stress on the job market.

Escambia County »

Escambia County, the most rural of the three Counties, is home to several industries including the headquarters of Provalus and Coastal Growers among its cities as well as the Poarch Band of Creek Tribe's businesses. Many residents commute to Mobile and Baldwin Counties and enjoy the rural quality of life Escambia County provides. Coastal Alabama Community College provides access to technical degrees and workforce training opportunities, which is an asset in developing an ongoing workforce pipeline for industry.

The County highlights several industrial sites on the Escambia County Industrial Development Authority's website, but there are limitations due to infrastructure and broadband access for some of the sites. The communities' leadership has been inconsistent in the awarding of tax abatements, and no standardized process is evident.

Escambia County Incentive Improvement Tactics (Mid-Term)

- **Provide elected officials economic development training.** Due to the inconsistent awarding of abatements among the cities and the County, it may be helpful to provide a program that educates elected officials on the site selection process, helps the group define their economic development goals, and develops an incentive policy that supports the success of these goals.
- **Create a comprehensive incentive strategy for the County and each municipality.** Based on a review of the incentives awarded by the County and cities within the County, there appears to be inconsistency as to when tax abatements are awarded for various

industries. A well-defined incentive strategy would enable the IDA to better represent the County and respond to information requests from site selectors.

Mobile County »

Mobile County has experienced significant industrial growth in recent years, with a robust transportation infrastructure that includes two interstates, five rail service providers, and a deepwater port. The Port of Mobile continues to grow and is a unique asset in the Region. The metro area also has a university and a thriving healthcare industry.

With notable wins in Advanced Manufacturing and Distribution, among others, the Mobile Chamber of Commerce has been successful in developing compelling incentive packages that address the needs of industry. No incentive policy is published on the Mobile Chamber website, but both the city and the County have been consistent in providing property and sales tax abatements to industry.

Mobile County Incentive Improvement Tactics *(Mid-Term)*

- **Encourage technology investment in existing industry.** With challenges recruiting workforce talent and the increase in workforce costs, most industries are at a tipping point to making significant investments in technology. Consider developing a tax abatement strategy that incentivizes existing industries to invest in technology such as automation, robotics, cybersecurity, and artificial intelligence to modernize facilities without requiring additional workforce. This will help preserve Mobile County industry and the corresponding jobs and tax base.

Regional Incentive Improvement Tactics *(Short-Term)*

While a regional approach to financial incentives and abatements does not make sense for the three Counties due to their differences, there are several regional strategies that could be used to strengthen overall economic development recruitment.

- **Adopt and publish a formal incentives policy.** Especially since the onset of the pandemic, much of the due diligence performed by companies and site selection professionals takes place online. The more information that can be obtained on the EDOS' websites—including tax rates and abatement opportunities—the better the chance the community will remain under consideration. No commitments should be made, but phrases such as “up to” or “are possible” indicate that the County is prepared to work with a company to make a site work.
- **Develop a white-glove service** to help industries navigate public services such as permitting, zoning, workforce training, utilities, and any other issues related to a successful location.

- **Consider public-private partnerships with companies** to support minority business growth, labor force participation, entrepreneurship, maker spaces, and socioeconomic well-being.
- **Schedule recurring meetings with regional existing industry.** Assist existing industry partners in increasing their competitiveness by helping them address local issues that are impacting their success. Identify any local policies that can be modified to help them remain competitive. Lift businesses as best practice leaders. Search for opportunities to co-locate key suppliers to help stabilize the supply chain. These meetings can also help the EDOs identify opportunities for expansions or issues on the horizon.

3. Increase Coordination of Business Formation Efforts

The pandemic has altered the economy in a number of ways, including the dramatic increase in startups. In 2020, [more than 4.3 million new businesses](#) were formed in the United States, an increase of 24 percent from 2019—the highest increase on record. With one month left to report in 2021, nearly five million applications for new businesses had been filed.

Early evidence suggests the increase in startups has been strongest outside the big cities, which have been hit hard by the exodus of office workers. The increase was driven, to some extent, by the layoffs that left millions of people out of work early in the pandemic. Researchers at [the Kauffman Foundation](#) found that about 30 percent of new entrepreneurs last year were unemployed when they started their businesses, which is roughly double the pre-pandemic rate.

A holistic approach to creating economic opportunity embraces the role of startups in the economic development ecosystem. The Ewing Marion Kauffman Foundation says that “traditional economic development seems to focus on the forest. But entrepreneurs are like new trees, or even weeds. They are pushing the edge of the forest, evolving to make the forest better.”

The three Counties each have a different approach to entrepreneurship. Mobile County has launched the Innovational Portal, which is directly linked to the University of South Alabama, while Baldwin County has collaborated with The University of Alabama. Escambia County has no formal approach, but it supports local merchants and businesses through its successful Main Street Atmore program.

Business startup strategies can be typically categorized into two different themes: one relies on innovative technologies such as coding, computer science, or autonomous systems, and the other relies on individuals with strong business acumen to take a business idea and turn it into a viable enterprise. Both Innovation Portal and Hatch use a combination of these strategies as part of their programming.

While each county is approaching small business, entrepreneurship, and business formation on its own, there are overarching tactics that they should consider using.

Baldwin County »

The Baldwin Community and Economic Development Foundation (BCEDA) operates a best-in-class economic development program for the recruitment of new businesses and support of existing ones. These efforts have resulted in billions of dollars of new capital investment to the County and thousands of jobs. Yet there remain opportunities to enhance the economic well-being of the County through entrepreneurship.

Baldwin County currently operates Hatch, an effort that provides space and learning to help startups grow. Hatch was created as a collaboration between the University of Alabama, the City of Fairhope, and the BCEDA. Offices and limited client space have been donated by BBVA Compass in Fairhope.

While this is a start, County and BCEDA leadership desire a more robust approach to fostering entrepreneurial growth in the County, specifically in technology businesses. The BCEDA has applied for federal funding through the Economic Development Administration to acquire and renovate the [Fairhope K-1 center](#) complex to house Hatch and a renewed effort to support innovation growth in the County.

The building is only one component of a larger effort to create an [entrepreneurial ecosystem](#) in the County. Success will require an orchestrated effort to use the intellectual capital and resources of business leadership in the County.

All communities that have a strong entrepreneurial culture share a common element: connectivity. Startup success depends on a strategy that connects innovators with those who can help create a market and find customers. This is done by leadership investing the time and implementing a strategy focused on connectivity. The following tactics are recommended to move this effort forward.

Tactic: Create an Entrepreneurial Task Force *(Short-Term)*

Develop an entrepreneurial task force focused on formulating a holistic entrepreneurial strategy moving forward. The task force, made up of no more than eight to ten individuals, should identify individuals that reside in the County who have been highly successful and would consider providing support through mentoring, investing, or coaching. BCEDA should analyze the experience of launching and operating Hatch and share findings with the task force to use in planning future entrepreneurial strategies. It is also important to inventory the types of businesses that residents have been involved in successfully launching and growing for future matchmaking purposes.

Tactic: Incorporate Students into the Entrepreneurial Ecosystem *(Short-Term)*

Coastal Alabama Community College's Fairhope campus offers technical programs and associate degrees in graphic arts, computer animation, and virtual and dynamic realities. The lab space has been compared to a small-scale Full Sail University, which is internationally renowned for its programs designed for entertainment, arts, media, and technology. Students at the Fairhope campus are using these skills and others such as coding to complete gaming, digital animation, and art projects. **The students and their projects, skills, and experiences should be incorporated into the local entrepreneurial ecosystem.**

Tactic: Create a Community Conversation on Entrepreneurship *(Mid-Term)*

The objective is to connect the startup community with other business and community leaders for support. Success requires a proactive approach to connecting the stakeholders in an entrepreneur ecosystem. A passive effort to just having meetings is unsustainable and will inhibit success.

Proactive networking can be accomplished formally, as with Kaufman Foundation's 1 Million Cups program. *1 Million Cups* must be formally registered and approved, but it provides an excellent template for getting started. While it might be easier to start a dialogue through a more informal means, a formal program will enhance connectivity in the community and offer the ability to showcase assets.

A more informal approach like Knoxville, Tennessee's Innov865 Happy Hour might also be considered. These gatherings are held periodically to enable makers and startup companies to network and learn from other successful entrepreneurs. These events can be focused on a variety of subjects, from investor funding to local elections.

Tactic: Engage Encore Entrepreneurs in Innovation *(Mid-Term)*

Twenty percent of Baldwin County is over the age of 65, and another 14 percent is aged 55–64. A higher percentage of this demographic are budding entrepreneurs who are looking to generate additional income, engage in their community, and pursue their passions nationally than locally. **As the County looks to expand entrepreneurial efforts, it must market to and engage this important demographic.** An example of this is Tallahassee's *Third Act*, supported by Domi Station. The program utilizes the skills of a diverse group of individuals that are 50-plus years of age and have been in the workforce for two to three decades to help others or launch a new business themselves.

Tactic: Create a Network of Investment Funds *(Mid-Term)*

Baldwin County is fortunate to have a Founders Fund to support investment in the technology sector. Building support systems in addition to the fund can bolster these efforts. Entrepreneurs need access to critical services such as legal, accounting, and marketing, each of which could be the difference between success and failure. **Identify other funding sources to accelerate growth while providing access to business support functions.** Promote programs such as Alabama Launch Pad to help generate interest in early-stage seed funding to start a business. Consider [Resident Partners](#) within the John Mica Engineering and Aerospace Innovation Complex at Embry-Riddle Research Park as a best practice. The partners provide professional advice, direction, and services pro bono to startups. Companies offer services including accounting, IT, licensing, and legal.

Escambia County »

Escambia County has successfully recruited large industrial and agricultural projects while supporting the expansion of business generated by the Poarch Band of Creek Tribe. To build a holistic local economy, there is an opportunity to support small business formation alongside entrepreneurship.

According to research from the Federal Reserve Bank of Minneapolis, entrepreneurship has the potential to boost local rural economies and keep populations from declining by tapping local talent and resources. Through entrepreneurial growth, rural economies can diversify and become less dependent on the economic pendulum swings affecting Agriculture and other typically rural industries. In short, entrepreneurs can help ensure the survival of rural communities.

Entrepreneurship programs cannot be a one-size-fits-all approach. Needs will vary based on the location, industry sector, and the business owner themselves. As Escambia County implements initiatives, it will be critical to listen to business entrepreneurs and their needs, aspirations, and ideas, and aim to meet them where they are. When their needs are considered and initiatives are implemented, small business entrepreneurs can be an incredible asset in the vitalization of rural economies.

Tactic: Support Existing Downtown Businesses with Training & Resources *(Short-Term)*

Retail Trade is the second largest industry in the County, representing 1,693 employees or 12.8 percent of employment. However, traditional retail has shifted dramatically over the last ten years, and the pandemic accelerated that disruption. Today, retail businesses are relying on e-commerce to sustain and grow their markets.

According to data from [Digital Commerce 360](#), consumers spent \$861 billion online in the U.S. in 2020, an incredible 44 percent jump from 2019. That's the highest annual U.S. e-commerce growth in at least two decades. E-commerce now accounts for 21.3 percent of total retail sales, up from 15.8 percent in 2019 and 14.3 percent in 2018.

Those numbers are astounding, yet not surprising. Advances in digital technology is driving rapid adjustments in the buyer experience and the business condition. With online devices, companies have more insight into client inclinations and can participate in enhanced engagement with them.

Despite the large revenue numbers, e-commerce is not limited to the retail giants. It is relatively affordable for small businesses to access new markets by targeting potential customers using digital tools.

A [2019 study](#) by the U.S. Chamber of Commerce Technology Engagement Center and commissioned by Amazon estimates the economic impact of digital technologies on small businesses in rural America. According to the report, the potential economic impact of implementing digital tools in small businesses in Mississippi is \$4.1 billion in annual sales, \$2.2 billion in annual value added, 19,600+ jobs added, and \$665 million in annual wages.

The study's key findings prior to COVID found that adopting digital services:

- Results in overall job creation
- Can grow annual revenues by more than 20 percent
- Has a high potential for impact on rural businesses with revenue under \$100,000

Only one in five business are currently digital. Of those, approximately 80 percent of their revenue is generated by selling their products and services online.

According to another [2019 report](#), Google's search and advertising tools helped create over \$385 billion in economic activity for more than 1.9 million businesses and nonprofits nationwide. In Mississippi alone, Google helped create \$180 million in economic activity for the 133,000 businesses that used Google's advertising tools, Google Ads and AdSense, in 2019.

Google's report indicates that small businesses that use digital tools experience revenue growth that is up to four times higher than those that do not. Additionally, Google's U.S. businesses received more than 35 percent of their clicks from outside the country. Google tools are assisting small businesses in connecting to customers around the globe.

In May 2020, Facebook launched Facebook Shops to help businesses create or strengthen their digital presence. The platform is an online storefront where people can browse, explore, and purchase products directly on Facebook and Instagram. With customizable collections and simple design tools, businesses can showcase featured products and make shopping seamless for customers.

Escambia County's City of Atmore has a strong Main Street Atmore program that is revitalizing downtown, bringing together the community, leveraging the strengths of the Poarch Band of Creek Tribe, and conducting programs to expand the local economy, including monthly merchant meetings.

Given the strong programming of the Main Street Atmore initiative, the number of establishments with less than fifty employees in Escambia County (see Figure 35), and the benefits of using digital tools for small businesses, monthly merchant meetings and programming should be used to work to expand the online potential of area businesses.

FIGURE 35: SMALL BUSINESS RETAIL ESTABLISHMENTS IN ESCAMBIA COUNTY

| Employment Size | # of Establishments |
|---|---------------------|
| All retail establishments | 157 |
| Establishments with less than 5 employees | 61 |
| Establishments with 5–9 employees | 49 |
| Establishments with 10–19 employees | 32 |
| Establishments with 20–49 employees | 15 |

Partner with the local chambers of commerce and the Main Street Atmore initiative to host small- to medium-size business roundtables focused on online tools and technology to empower businesses to reach an extended customer base. Free workshops and training resources offered online, or in-person could be advocated for and promoted by the partners.

Tactic: Launch a 1 Million Cups Initiative (Mid-Term)

Although regional resources exist, there is an opportunity to directly support local entrepreneurs. **Local organizations should partner to launch a 1 Million Cups chapter.** The national program is designed to engage, educate, and connect local entrepreneurs.

Founded by the Kauffman Foundation, 1 Million Cups (1 MC) is based on the idea that entrepreneurs network and discover solutions over a million cups of coffee. The free, bi-weekly coffee gathering helps build startup communities at a grassroots level. At 1MC, everyone connects with each other: the entrepreneurs who present, the communities that offer support, and the organizers who dedicate their time to make the program happen.

The Key Pillars

- Presenters are invited to give presentations, not pitches.
- 1MC creates an environment for authentic connections, not networking.
- 1MC is run for the community, by the community.

The Core Program

- Meetings are held weekly on Wednesday mornings.
- Each event features two presenters.
- Presenting businesses must be less than five years old, and desire to learn.
- Each presentation lasts twenty minutes, followed by a twenty-minute Q&A.
- After the Q&A, the community asks: “What can we do to help you?”
- Events are free always and open to the public, with free coffee.

The 1 Million Cups launch process varies based on the team and community. Time, commitment, and follow-through on action items during the various steps of the process are important. Starting a 1 Million Cups Community takes an average of three months.

Mobile County »

Mobile's entrepreneur scene is growing through deliberate programs. The Innovation Portal is well known, has engaged local leadership, and has formed strong partnerships to aid in its continued success. Spring Hill College has recently added an entrepreneurship major, and a local entrepreneur is being recognized nationally for her products. The entrepreneur scene is also growing organically due to the size and business climate of the city.

Although Mobile County has strong programs and partnerships in place and a climate conducive to entrepreneurship, it remains critical to purposefully foster new ideas, provide support to underserved entrepreneurs, and identify gaps in resources. The world of entrepreneurship is constantly evolving; to continue to be a hub for aspiring business leaders, Mobile will need to stay ahead of market trends and disruptions.

Tactic: Expand Innovation Portal Website *(Short-Term)*

The Innovation Portal has strong leadership and is viewed as a local success. To engage new and potentially non-local entrepreneurs, the website should be expanded. **The website should showcase Mobile's dynamic entrepreneurial environment and the resources that exist in the area, regardless of whether they are managed by the Chamber or the Portal.**

Best Practice: The **Iowa City Area Development (ICAD)** website outlines available resources, offers contact information, and highlights growing entrepreneurs. This collaborative marketing effort demonstrates partnerships and positions ICAD as a resource and facilitator to entrepreneurs. In the long-term, the Portal should expand its content to include an interactive tool that guides would-be entrepreneurs to the relevant partners and organizations that can offer support.



Source: Iowa City Area Development website

The Innovation Portal should also showcase minority entrepreneurship programs, including Commonwealth National Bank's loan program, University of South Alabama's Minority Business Accelerator, and anchor institutions' supplier diversity programs. Consider the [Michigan Economic Development Corporation](#) or [Invest Atlanta](#) as best practices.

Tactic: Survey Entrepreneurs and Stakeholders to Better Understand Local Needs *(Short-Term)*

Mobile County has significantly enhanced its entrepreneurship efforts through the launch of the Innovation Portal. Throughout the County and Region, organizations are funding programs, hosting webinars and networking events, and awarding grants and loans. But how is success measured holistically? How can the partners be assured that current and prospective entrepreneurs understand the opportunities before them and the gaps that exist in the community?

Develop and deploy an entrepreneurship survey on the perception of the entrepreneurship business environment and resources as well as individual interest in entrepreneurship. The survey would help leverage and promote resources more holistically. Long-term partners should consider the development of a plan that aligns efforts, minimizes overlap, and identifies needed resources.

4. Build Regional Marketing & Communications Platforms

EDOs are continuously being challenged to be more strategic in their communications and marketing efforts. Balancing both internal and external clients, marketing and communications activities must be more than a series of reactive events such as the dissemination of a press release or the placement of a trade publication advertisement. EDOs must be deliberate, innovative, consistent, and proactive in communications and marketing activities.

The impacts of COVID and supply chain disruptions have changed project timelines and how businesses are choosing to deploy capital. Combined with the uncertain economic outlook and emerging social and technological trends, this means EDOs are operating in an increasingly difficult external environment.

Within economic development, perceptions surrounding the use of incentives, the challenges in finding a reliable and skilled workforce, expectations around mitigating risk, and increasing competition signify a more challenging marketplace, making it crucial to communicate well and stand out from the crowd.

While each county has a unique set of assets, targeted industries, and goals for economic development, increasing outreach through a tactical marketing and communications strategy can benefit the Counties both individually and collectively. Such a strategy might include:

- Implementing strategic messaging across platforms (short-term)
- Improving websites and online presence (short-term, ongoing)
- Enhancing technology to highlight assets (mid-term)

The three Counties in the South Alabama Region are fortunate to continue to be a location that site selectors and business decision-makers know and can find. In developing any tactical marketing and communications plan, though, it is critical to understand how target audiences get the information they are looking for regarding a location, and how they want that information delivered.

Even before a site selector, corporate real estate agent, or business decision-maker reaches out to a community, a great deal of research has already been conducted online. Website searches, data downloads, and a review of incentives have often already taken place. With that in mind, websites, digital advertising, and consistent messaging are important components to reaching target audiences with the right medium at the right time.

In 2020, Development Counsellors International (DCI) published their Winning Strategies in Economic Development Marketing report, which asked corporate executives and location advisors for the most effective strategies and techniques in economic development marketing.

One significant finding is that certain location types are at a disadvantage, at least in the short term, as DCI found that COVID-19 is impacting how location decisions are being made. The survey posed the following question: “Thinking about the impact of COVID-19 on corporate location decisions, how has your perception of the following location types as a business location been impacted?” Nearly 50 percent of respondents indicated that “large urban areas (cities with populations of more than one million)” are now less attractive as business locations.

Several other findings as it relates to how the Region markets itself are worth noting:

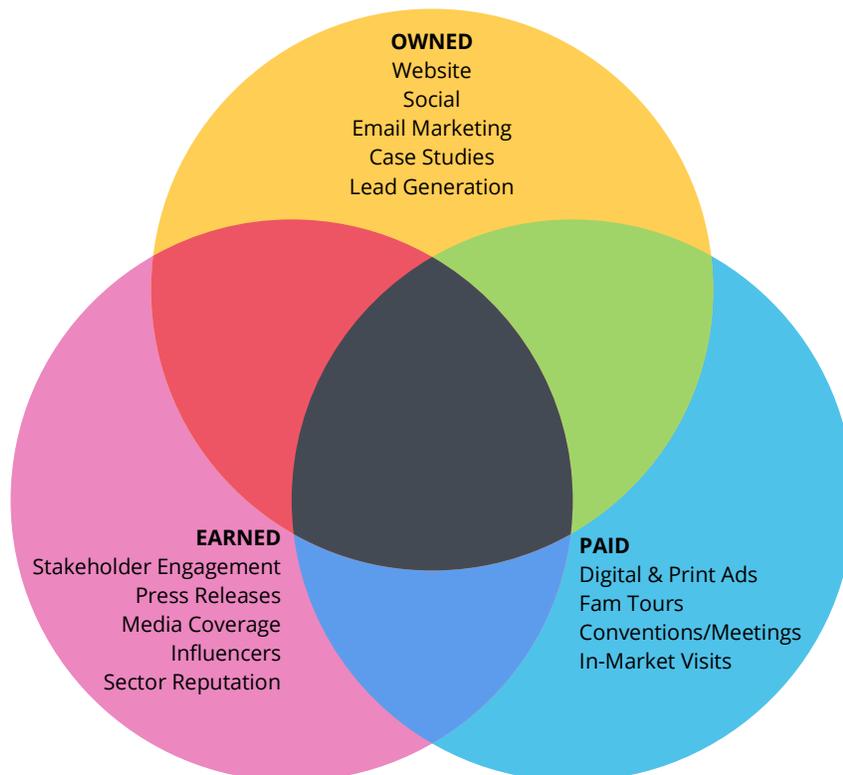
- Since 1996, dialogue with industry peers has been the top source of information about a location, followed by business travel and articles in newspapers and magazines.
- Since 2014, an internet/website presence has been rated as the most effective marketing technique, followed by planned visits to corporate executives, media relations/publicity, and hosting special events.
- 80 percent of respondents used the internet during their last site-selection search, and 77 percent reported a strong likelihood that they would visit an EDO’s website during their next site search.
- Location advisors said staff contact information and incentive information are the most useful features of an EDO’s website.

Marketing & Communications Outcomes & Channels »

To successfully implement the tactics outlined and reach decision-makers, the following outcomes should be achieved in marketing and communications initiatives undertaken.

- **Awareness:** Increase awareness of each of the counties and the Region overall along with its competitive advantages, existing industry strengths, the diversity of its communities, and the willingness of its partners to help companies succeed.
- **Reputation:** Enhance the Region’s reputation among site selectors, commercial real estate developers, companies, entrepreneurs, and existing employers, as well as national and international media, as a Region that offers a business-friendly environment in which companies and their employees will succeed. Highlight strategies undertaken during COVID to keep businesses open, retain talent, and build resiliency.
- **Engagement:** Support the efforts of regional partners and continue to engage State and community leaders as well as potential investors in the Region’s economic development efforts.
- **Recruitment:** Proactively recruit and retain business in the Region. Leverage the support of regional partner organizations to position for an increase in the project pipeline and wins, with an emphasis on focus areas outlined in the strategic plan.

To realize these goals, each of the EDOs should utilize a mixture of marketing and communications channels. The channels are broken down into three categories: owned, earned, and paid.



Outreach Tools »

The following table represents ideas for outreach tools that will support key messages, strategies and tactics. These can be used by each of the EDOs and in partnership with SARPC and other regional partners. This is not a comprehensive list, and it is not necessarily listed in the order it would be implemented.

| Tool | Description |
|---|---|
| Messaging & Outreach <i>(Assets outlined below)</i> | <ul style="list-style-type: none"> • Compelling and meaningful messages are vital to successful economic development. The messages will be used in interviews, digital media, presentations, web materials, and other media. • Developers, business owners, and others want to be assured that their investment in the Region will have broad support from local leaders, residents, and key partners, and consistent messaging can offer that confidence. • Audience: All • Measurement: Consistent use of messaging throughout all communications tools |
| Top-Line Talking Points | <ul style="list-style-type: none"> • County and regional overall talking points • The importance and tactical use of incentives • Benefits of South Alabama to foreign direct investors • Regional benefits talking points, including mitigation of risk (i.e., natural disasters) |
| Grasstops Outreach | <ul style="list-style-type: none"> • Messaging for local officials and stakeholders to convey to their sphere of influence • High-level talking points regarding economic development and the importance of private sector and foreign direct investment • Key accomplishments and success stories • Important metrics |
| Fact Sheets & Infographics | <ul style="list-style-type: none"> • Site sheets • Community and regional profiles |
| Board Meetings | <ul style="list-style-type: none"> • Strengthen board members into surrogates with key audiences • Ensure materials presented at the board meetings are also available online to the media and the public |
| Legislative Session & Activities with Delegation | <ul style="list-style-type: none"> • Talking points and/or presentations targeted specifically at legislators who can help provide additional site development funding and infrastructure assets • Leverage local success stories in communicating with legislators |
| Leveraging Testimonials | <ul style="list-style-type: none"> • Testimonials tell the story of why each county and the overall Region are attractive to business |

| Tool | Description |
|--|--|
| Virtual Presentations <i>(See specific recommendations on later page.)</i> | <p>Virtual technology and virtual presentations bring a level sophistication for EDOs. Organizations can project an image to prospects and clients that best illustrates its assets, resources, and vision for growth. Through the creative use of technology, an understanding of data, and a clear articulation of the Counties' and the Region's business benefits, effective presentations can position and communicate the value proposition to each key audience.</p> <p>Develop a non-linear presentation that responds to the audience's needs. A non-linear presentation means that you will not necessarily start at the first slide and proceed sequentially. The slides will be structured similar to a website, enabling the presenter to respond to their audience's area of interest by clicking on a topic that is hyperlinked.</p> |
| Conferences & Events | <p>As in-person events begin to increase, consider attending and leveraging industry conferences and events to inform decision-makers about the Region, available sites, and unique workforce programs.</p> |
| Digital & Social Media | <ul style="list-style-type: none"> • There are several key components to an effective integrative digital and social media approach that should be considered and utilized with all the activities listed below, including: <ul style="list-style-type: none"> ○ The communications efforts must be integrative, combining online with traditional communications strategies (those listed in the previous section). ○ The efforts must be targeted and efficient. ○ No single digital medium can stand alone; combine to maximize results. ○ The efforts are acquisition-focused to decision-making audiences and influencers. ○ All marketing must be optimized for desktop, tablet, and mobile devices. ○ Marketing must contain staff contact information that is easy to find. • Audience: All • Measurement: Consistent use of messaging throughout all communications tools |
| Website Enhancement <i>(See specific recommendations on later page.)</i> | <ul style="list-style-type: none"> • EDO websites serve as the foundation for virtual marketing efforts; given the focus on a community's online presence, the EDOs should implement several tactics to improve the user experience on the site • Enhance promotion of available sites and buildings • Enrich the workforce and education data available on the site |
| Search Engine Optimization | <ul style="list-style-type: none"> • Google's Webmaster Guidelines suggest making pages primarily for users, not search engines. That includes consideration on how pages of your website might appear in Google. Most search results are made up of three things: a title, a URL, and a description. <ul style="list-style-type: none"> • A proper title tells visitors exactly what the page is about. • A good URL informs visitors about the structure and organization of your site as it relates to the page itself. • A thoughtful description gives visitors just enough information to assure them that the page has what they are looking for. |

| Tool | Description |
|---|--|
| | <ul style="list-style-type: none"> Analytics should track the metrics listed below and capture a user’s device and browser type, location, and user path. Measurement: Website tracking data – Sessions including new users, time on site, pages, referral sources, bounce rate |
| Performance-Based Online Advertising & Retargeting | <ul style="list-style-type: none"> Content advertising is an extremely intent-driven medium reaching individuals at the moment of inquiry. Google offers several services based on content that can be used to promote the Region, all of which target users based on behavior and demographic. Through Google, EDOs can expect high click-through rates and quality clicks. Consider the use of display banner advertising and retargeting in small campaigns. Audience: Site selectors and decision-makers/influencers Measurement: Reach and click-through rates Budget: Cost per click |
| Search Engine Marketing / Paid Search | <ul style="list-style-type: none"> Paid search ads appear adjacent to Google results when users search for relevant keywords or topics. Cost is determined based on a bidding process. Search ads let you determine your budget, keeping costs low. Create search ad and determine budget and timing Use results/measurements to determine success and adjust accordingly Audience: Site selectors and decision-makers/influencers Measurement: Reach and click-through rates Budget: Cost per click |
| Email Marketing | <ul style="list-style-type: none"> Email marketing is a cost-effective medium for building relationships and maintaining regular contact with audiences, customers, and prospects. By implementing a meaningful email marketing campaign that appeals to key audiences with a limited number of stories and messages, the EDOs can stay top of mind with their target audiences. Audience: Site selectors, C-level decision-makers, influencers Measurement: Open rates and click-throughs should be at or higher than industry averages (20 percent open rate and 2 percent click-through rate) |
| Targeted, Content-Rich Email Blasts | <ul style="list-style-type: none"> Identify targeted audience for limited email outreach (100–250 members) Develop schedule and ideas for emails that relate the benefits of the Counties and the available sites and workforce Determine frequency and timing and be consistent in delivery Optimize content for mobile viewing |

Tactic: Improve Websites & Online Presence *(Short-Term, Ongoing)*

Potential economic development projects often begin by considering states and defined geographic regions. Rarely does a prospect, company, or site selector have a specific community in mind. Communities and regions, however, can increase their visibility through a strong online presence. By increasing and enhancing each of the EDO's online presences, the Region can expand its reach and share competitive regional advantages and sites with interested investors.

Economic development websites most valued by site selectors and business decision-makers:

- understand their audiences and speak to them in their own language;
- are heavy on bulleted facts and light on filler;
- provide relevant data in formats that users can download and manipulate;
- are fast, easy to find, and easy to use;
- have the right content, organized in a way that makes sense;
- are current, visually attractive, and regularly updated;
- use photos and infographics to highlight key pieces of information; and
- make the organization's contact information clear and accessible.

Using the eight elements outlined above, each of the EDOs have opportunities to make improvements on their websites. Consider the following recommendations.

- **Maps:** The homepage should showcase maps that feature the community's location within the State, the southeast, and the nation. Consider how foreign direct investment companies and those not familiar with the area would be able to understand location. Also consider highlighting logistical advantages.
- **Competitive Advantages:** Instead of relying on the audience to interpret data into their own narrative, use the data to synthesize and emphasize competitive advantages for target industries. Each part of the narrative must answer the question, "How does this fact help a business's bottom line?"
- **Regional Data:** Using data from earlier in this report, highlight strong numbers/percentages as compared to the State or nation using simple infographics and short narratives.
- **Incentives:** As noted in the incentive review, the EDOs' websites show limited incentive and property information. In evaluating the website, consider adding detailed information about incentive programs as well as associated forms and criteria.
- **Workforce:** While communities have improved in featuring the workforce on their websites, they often list basic demographic information and educational institutions. In a hyper-competitive market, organizations must highlight what business decision-makers cannot already find through online databases. Websites, including partner

websites such as SAWDC and the EDO's, should demonstrate partnerships with educational and workforce partners along with industry. Give specific examples and timelines of how success was achieved, considering highlighting various degrees and certificate programs within target industries. In addition, each target industry page should feature relevant workforce and education statistics.

- **Case Studies and Testimonials:** Seeing success from a company perspective helps differentiate a community. Success stories need to be told throughout the website and throughout the entire year, not saved for annual reports. Testimonials should help a company understand the community behind the numbers. Include testimonials from owners of businesses of all sizes on why they choose to live and work in the county or region. Feature professionals that are passionate about the Region and the type of industry thriving in the Region. Use sidebars or callout boxes, with infographics and statistics, to generate more visual interest.
- **Newsroom:** Create a newsroom that features documents such as case studies, fact sheets, bios, and presentations. Rather than taking people away from the site to a partner site or a PDF, post press releases directly on the site. Press releases can feel antiquated, though and with a diminishing traditional media, it's essential to publish success via other avenues. Consider including the following in a newsroom:
 - Press releases
 - Hot topics, including fact sheets on projects, State or regional rankings, and releases from partners
 - Success stories or case studies
 - Multimedia, including videos, photos, interviews
 - Contact information
 - A search function by date, subject, and content type
- **Contact Information and Call to Action:** Every page on a site should have a contact with a photo and a direct phone number and email address. Include a call to action on each page to tell the site locator or decision-maker what to do next.

Tactic: Enhance Technology to Highlight Assets *(Mid-term)*

Technology has made it easier for regions to project an image to prospects and clients that best illustrates its assets, resources, and vision for growth. Through the creative use of technology, an understanding of data, and a clear articulation of the area's business benefits, the EDOs can work separately and collectively to communicate the regional value proposition to each of its key audiences locally, statewide, domestically, and globally.

Tools such as **interactive maps, digital presentations, interactive drone footage, overlays in Google Earth** (KMZ files) and other tools, partnered with clearly defined competitive advantages, including key messaging and benefits of business growth for the Region, are needed to properly present the product offerings.

While drone videos and photography are an effective marketing tool, **enhancing drone site footage or photography by creating 360° interactive photos** for sites and buildings increases engagement by prospective clients. [Kuula.co](https://kuula.co) is an easy-to-use and budget friendly solution for creating 360° virtual tours and sharing them on the web and in virtual reality platforms.

Increase Positioning for Top Sites and Buildings

Even before the pandemic, initial site selection research was conducted online by evaluating workforce demographics, incentives, and sites and buildings. Many EDOs use site and building databases to showcase properties, but given the speed with which a site selector needs to narrow down locations, these tools can be overwhelming, cumbersome, and unusable on mobile devices. Positioning the best sites for increased visibility and consideration is critical in today's marketplace.

In addition, the topic of finding truly ready sites has become an industrywide conversation. Consider this excerpt from a [recent publication](#) by Area Development magazine:

Across the nation, finding well-positioned, developable land with utilities and infrastructure has become almost impossible in some areas. Just about all of it has been scooped up by hungry buyers. Competition for land zoned for industrial/warehouse development is particularly intense.

Considerations for greenfield acquisition are quite different than improved land. Notably, buyers must factor in additional risk related to timing and cost of utilities and infrastructure. Timing adds a lot of risk because no one knows what the market will be like by the time the land is ready for vertical development.

As noted previously, the South Alabama Region has several sites that should be marketed consistently as they offer low risk and short development timelines.

Given the market and the desirability of finding ready sites, improve online marketing and promotion of its top sites on website(s), demonstrating competitive advantages and due diligence performed. The EDOs should consider three specific initiatives to improve site marketability to target audiences:

- Develop a regional sites landing page that highlights top properties.
- Improve site overviews by depicting due diligence, timelines, and associated incentives.
- Create site videos that concisely tell each site's story and selling points.

Develop a regional sites landing page: Each of the EDOs, the EDPA, and the State have a sites and buildings database. While these have value, the development of landing microsites for regional sites and buildings could expand the Region's reach.

The microsites would be simple and focus on three to six sites. They would be promoted using paid digital advertising and search engine optimization. The sites would link visitors back to the respective EDO website and offer contact information. In addition, specific sites could be featured outside of the database or sites page. Pique a visitor’s interest by featuring an airport site on the Aviation target industry page. Consider the layout and details on the [AR-TX REDI website](#) as a best practice.

Improve site overviews: Prior to sending a visitor to a building and site database, feature key sites and associated selling points and due diligence in both online materials and downloadable PDFs. Demonstrate not only the site size but also access points in the Region, including infrastructure, workforce, utilities, and regional/State/national maps. Using the checklist in Figure 36 can help ensure consistency, improve asset awareness, and inform and establish trust among potential customers.

FIGURE 36: COMPETITIVE PROPERTY CHECKLIST

| | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Recent Aerial Photography <input type="checkbox"/> Letter of Commitment (if applicable) <input type="checkbox"/> Conceptual Site Plans <input type="checkbox"/> Covenants <input type="checkbox"/> Executive Summary <input type="checkbox"/> Flood Map <input type="checkbox"/> Foreign Trade Zone <input type="checkbox"/> Gantt Analysis/Timeline <input type="checkbox"/> Infrastructure Development Plans for Sites not Shovel-Ready <input type="checkbox"/> Location/Vicinity Maps <i>with local and regional amenities:</i> <ul style="list-style-type: none"> <input type="checkbox"/> Global <input type="checkbox"/> U.S. <input type="checkbox"/> Regional <input type="checkbox"/> County <input type="checkbox"/> City <input type="checkbox"/> Ingress/Egress Routes to Property <input type="checkbox"/> New Market Tax Credits <input type="checkbox"/> Ownership / Tax Maps | <ul style="list-style-type: none"> <input type="checkbox"/> Report/Summaries: <ul style="list-style-type: none"> <input type="checkbox"/> Phase I <input type="checkbox"/> Environmental <input type="checkbox"/> Geotechnical <input type="checkbox"/> Soils <input type="checkbox"/> Wetlands <input type="checkbox"/> Topography Map <input type="checkbox"/> Zoning Map <i>with surrounding areas up to one mile</i> <input type="checkbox"/> Utility Maps <i>(with existing and proposed utilities providers defined). Consider using the APWA color guide to highlight current and proposed utility infrastructure.</i> <ul style="list-style-type: none"> <input type="checkbox"/> Broadband/Fiber <input type="checkbox"/> Electric <input type="checkbox"/> Natural Gas <input type="checkbox"/> Telecommunications <input type="checkbox"/> Water |
|--|---|

Best Practices

- Provide downloadable links to existing **KML/KMZ Google Earth files** on executive summaries on online databases.
- Enhance drone site footage to create **360° interactive drone photos** for virtual site tours to engage prospective clients.
- **Use inexpensive customized templates** (Microsoft Word and PowerPoint) from a site like [creativemarket.com](#) to develop branded executive summaries.

Create site videos. Research suggests that visuals are far more effective than words in terms of communication. On average, people remember only 10 percent of text information, while studies suggest that people remember more than 65 percent of the information that is displayed visually. Video content marketing can be used to raise a site's profile online and share its competitive advantages in a memorable way.

Videos should be no longer than two minutes and use a combination of videography and graphics to underscore key messages. Each video should be centered around the story, not the sell.

Here are a few types of videos to explore:

- **Unique Identifiers** – Videos showcasing unique offerings only found in the community or region, such as events, neighborhoods, and venues that employees and employers could experience.
- **CEO Testimonials** – Videos communicating the trust that existing industry has in their community through one-on-one interviews. These are a great platform for target industry businesses to promote their organizations and their success.
- **Deal Flow Content** – Videos showcasing corporate project wins for attraction and/or relocation.

When using video to highlight a site, consider including:

- Messages about what the viewer will see
- A map demonstrating national-, regional-, and community-level location
- Landmarks such as major cities, airports, ports, and interstates
- A handful of competitive advantages or features:
 - Ownership
 - Acreage and/or square footage (consider hectares and meters for foreign direct investment viewers)
 - Utility providers, line placements, size, and capacity
 - Quality of place, including neighborhoods (and price points) and amenities
 - Educational providers, including number and types of training programs

TACTIC: Implement Strategic Messaging Across Platforms

(Short-Term)

Economic development marketing is a long-term, ongoing proposition. Therefore, it is critical to effectively communicate the advantages each county and the Region have to offer a business and, when appropriate, high-level talent.

Clear, well-constructed messages help people break through information overload and choose among many different sources of information. The goal of the messaging points is to shape opinion and motivate behavior. It is based on three principles of effective communication and persuasion:

- Opinion is often shaped by a relatively small number of opinion leaders—those who are knowledgeable, influential and articulate.
- A message is more believable if the source is credible. The economic development staff and community must deliver the narrative honestly, clearly, and from a position of expertise.
- Messages are most persuasive when they are simple; relevant; consistent; aligned with the audiences' needs, concerns, and interests; and repeated over time using multiple means of delivery.

The primary focus of a tactical marketing and communications strategy is lead generation and awareness building. The SARPC Region has achieved a host of successes this past year, including several project announcements of new locations as well as expansions. The combination of strong economic developers, proactive workforce and education partners, and forward-thinking infrastructure projects has increased the Region's marketability.

With that in mind, efforts have been aimed at communicating specific messages to target audiences.

- **Businesses know:** The South Alabama Region understands and responds to their rapidly changing industry needs and leverages regional partnerships to increase success. The Region demonstrated its capacity and business-friendly climate during COVID by ensuring businesses could stay open and locate needed talent.
- **Site selectors know:** The Region brings together numerous partners to help companies mitigate risk, identify and employ a skilled workforce, and leverage resources for bottom-line benefits.
- **Policymakers and legislators know:** Partners and regional economic developers are collaborating and diversifying the economy by promoting the Region to national and global audiences.
- **Regional leaders know:** What is happening in economic development at the local and regional levels and how to promote it.

The EDOs should use audience segmentation to determine what messages should be conveyed, to whom, and with what action as the goal. Specifically consider:

- What do we want them to think?
- What do we want them to do?

Targeted External Stakeholders

Executive-Level Corporate C-Suite Decision-Makers (U.S. and International):

Ultimately, business location decisions are made by top-level executives in a firm. Ensuring that C-level decision-makers in the key industries are aware of the Region and understand the area's and the State's value propositions will be an important factor in influencing the perceptions of those considering relocation or expansion.

Site Location Consultants: Site location consultants often assist large firms in major location projects. They are an influential group that can bring multiple significant projects to the State over time. Building a solid relationship with this group and ensuring they are aware of the Region's business and industry advantages is paramount to success. The objective is to create relationships that keep the area front of mind and generate opportunities for the development to be a part of the competition as project opportunities arise.

Industry and Economic Development Media: Informing and engaging national and international industry and economic development media about the Region and the MSA is a cost-effective method of getting key marketing messages out to large, targeted audiences as well as of building positive perceptions of Alabama. Ensuring South Alabama is positioned positively in national and international markets, industry, site selection, and in-State media will positively influence business perceptions.

Government Officials: Government leaders can play a role in creating a business-friendly environment through regulations and policymaking as well as by providing investments in communities for infrastructure, logistics, workforce, and other priorities.

Existing Industry: Existing industry is critical in creating and maintaining a diverse economy. Existing industry is generally a larger creator of new jobs and capital investment than new projects.

Targeted Internal Stakeholders

Government Officials: Although government leaders are external stakeholders, they are also an internal audience to the organization's funding use and effectiveness measurements. SARPC and the EDOs should ensure leaders are aware of the many activities being undertaken that support job creation and capital investment as well as how pro-business policies influence location decisions.

Utilities: Major utilities and local energy co-ops have a vested interest in economic development, and many provide economic development services and financial programs within their territories.

Educational Entities: Within the three counties, there are twelve institutions of higher learning, and there are twenty-two within the SARPC Regional Laborshed. These are key partners in providing a skilled and trained workforce to targeted industries, and they need to be aware of industry labor needs.

Civic organizations, nonprofits, and chambers of commerce: These nonprofit organizations can help spread awareness of a shared message and goals. They have large reaches and can often influence the culture of a community. These organizations also serve as important funnels of information to talent.

Small Businesses: Small businesses are the backbone of many communities. Keeping them informed as to how proactive and competitive economic development efforts benefit their business, as well as ensuring they are aware of any programs or services that benefit them, is important.

Residents: Residents play an important role in supporting community efforts to attract new and expanding business and industry. By engaging this group, the organization can eliminate or lessen the risk of no growth mindsets and foster an environment conducive to economic growth and job creation.

Appendix

Escambia County – Alternative Economic Overview Location Pins

| | | ATMORE 45-MIN DRIVE TIME (ZIP CODES) | BREWTON 45-MIN DRIVE TIME (ZIP CODES) |
|--|--|---|--|
| DEMOGRAPHICS | | | |
| Current Population Estimate | | 330,900 | 265,484 |
| 2016 Population | | 327,082 | 258,008 |
| 2011 Population | | 326,252 | 246,703 |
| Annual Population Growth | | – | – |
| People per Square Mile | | – | – |
| Median Age | | 39.8 | 41.0 |
| LABOR FORCE | | | |
| Civilian Population Age 16 years and over | Current Labor Force Size | 140,683 | 112,989 |
| | Labor Force Participation Rate | 53.3% | 53.4% |
| | 2016 Labor Force Size | 139,099 | 107,793 |
| | 2016 Labor Force Participation Rate | 53.8% | 52.8% |
| | 2011 Labor Force Size | 147,366 | 110,413 |
| | 2011 Labor Force Participation Rate | 57.3% | 56.6% |
| Civilian Population Age 25–54 | Current Prime-Age Labor Force Participation Rate | 73.6% | 71.9% |
| | 2016 Prime-Age Labor Force Participation Rate | 72.9% | 70.0% |
| | 2011 Prime-Age Labor Force Participation Rate | 75.3% | 74.2% |
| Unemployment Rate March 2021 (Seasonally Adjusted) | | – | – |
| Unemployment Rate March 2020 (Seasonally Adjusted) | | – | – |
| Veterans (Age 18–64) | | 12,574 | 14,835 |
| Total Employment (2021 Q1) – All Industries | | 120,574 | 75,466 |
| Total Employment Change (2020 Q1) – All Industries | | 126,703 | 78,386 |
| Total Employment Forecast (2026 Q1) – All Industries | | – | – |

| | ATMORE 45-MIN DRIVE TIME (ZIP CODES) | BREWTON 45-MIN DRIVE TIME (ZIP CODES) |
|---|---|--|
| Mean Commute Time (Min.) | 25.5 | 27.0 |
| EDUCATIONAL ATTAINMENT (AGE 25–64) | | |
| Pupil/Teacher Ratio | – | – |
| Spending per Pupil | – | – |
| Student Enrollment | – | – |
| Age 25–64 with High School Diploma or Higher | 87.3% | 88.9% |
| Age 25–64 with Associate Degree or Higher | 31.3% | 31.6% |
| No High School Diploma | 12.3% | 11.9% |
| High School Graduate | 34.9% | 34.2% |
| Some College, No Degree | 21.6% | 22.3% |
| Associate Degree | 10.1% | 12.3% |
| Bachelor's Degree | 14.1% | 13.5% |
| Postgraduate Degree | 7.1% | 5.8% |
| SOCIAL | | |
| Total Housing Units | 146,008 | 113,765 |
| 2016 Total Housing Units | 142,298 | 109,057 |
| 2011 Total Housing Units | 142,419 | 106,803 |
| Average Annual Wage | \$41,989 | \$48,392 |
| Cost of Living Index | 98.5 | 93.1 |
| Poverty Level (% of All People) | 17.4% | 14.1% |
| Households Receiving Food Stamps / SNAP | 14.3% | 12.5% |
| Disconnected Youth | 2.6% | 3.4% |
| Children in Single-Family Homes (% of All Children) | 41.3% | 35.0% |
| UNION MEMBERSHIP | | |
| Union Membership (Private) | 5.8% | 5.2% |
| Union Membership (Manufacturing) | 6.6% | 5.6% |