



Industry Spotlight

Transportation and Logistics (US Cluster Mapping)

Southeast Georgia Alliance



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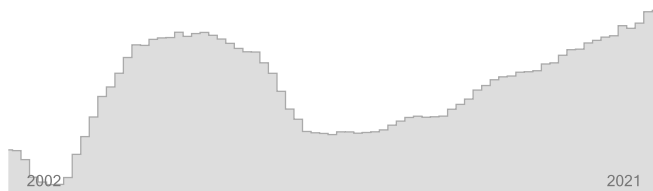
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Spotlight Summary

Transportation and Logistics (US Cluster Mapping)
Southeast Georgia Alliance – 2021Q1

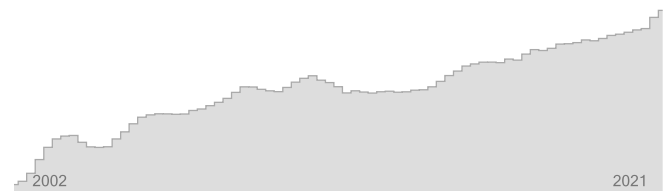
EMPLOYMENT



4,389

Regional employment / 1,834,151 in the nation

WAGES



\$51,400

Avg Wages per Worker / \$66,610 in the nation

2.8% ↑

Avg Ann % Change Last 10 Years / +0.9% in the U.S.



1.7%

% of Total Employment / 1.2% in the U.S.

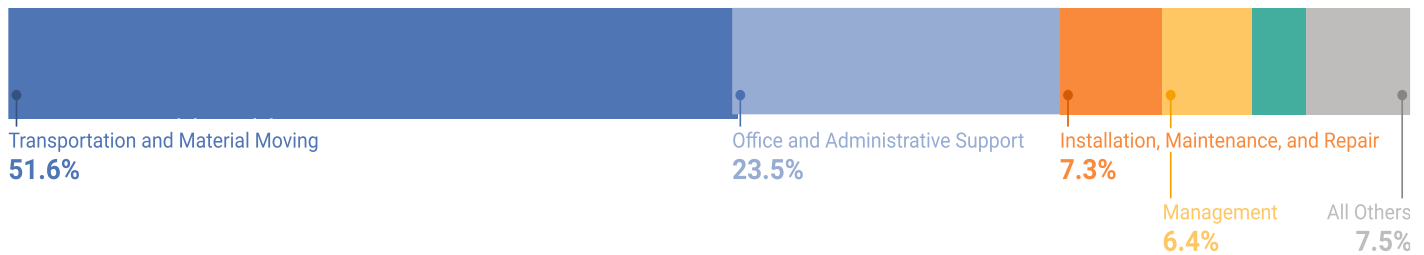


2.0% ↑

Avg Ann % Change Last 10 Years / +2.9% in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

11.7% ↑



Freight Transportation Arrangement

-0.8% ↓



General Freight Trucking, Long-Distance, Truckload

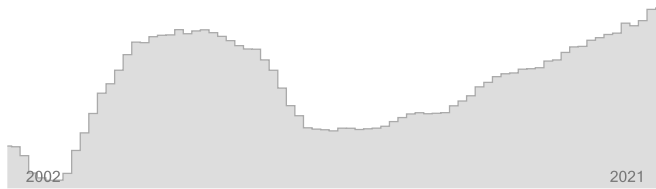
8.7% ↑



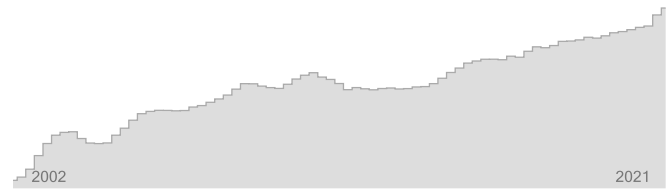
Specialized Freight (except Used Goods) Trucking, Long-Distance

Industry Snapshot


EMPLOYMENT



WAGES

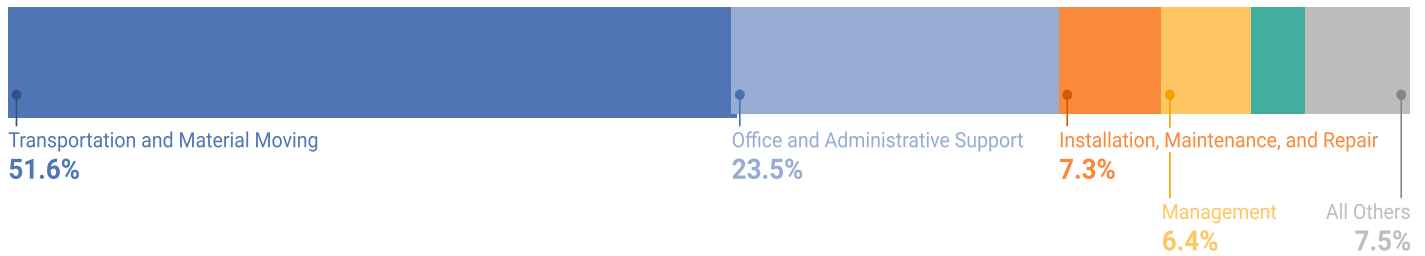


6-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
Freight Transportation Arrangement	1,428	\$47,092	3.18		149	0.7%
General Freight Trucking, Long-Distance, Truckload	1,299	\$54,677	1.24		141	0.3%
Specialized Freight (except Used Goods) Trucking, Long-Distance	658	\$59,287	2.80		74	0.7%
Air Traffic Control	311	\$42,946	9.48		35	1.1%
Other Support Activities for Air Transportation	211	\$63,922	1.03		24	1.1%
Other Airport Operations	117	\$24,765	0.63		13	1.0%
Scheduled Passenger Air Transportation	115	\$43,685	0.17		13	1.1%
Support Activities for Rail Transportation	66	\$49,296	1.10		6	-0.4%
Other Support Activities for Road Transportation	66	\$59,946	0.64		8	1.3%
Interurban and Rural Bus Transportation	52	\$40,304	1.61		6	0.4%
Remaining Component Industries	65	\$54,052	0.30		7	0.3%
Transportation and Logistics (US Cluster Mapping)	4,389	\$51,400	1.36		483	0.6%

 Employment is one of the broadest and most timely measures of a region's economy. Fluctuations in the number of jobs shed light on the health of an industry. A growing employment base creates more opportunities for regional residents and helps a region grow its population.

 Since wages and salaries generally compose the majority of a household's income, the annual average wages of a region affect its average household income, housing market, quality of life, and other socioeconomic indicators.

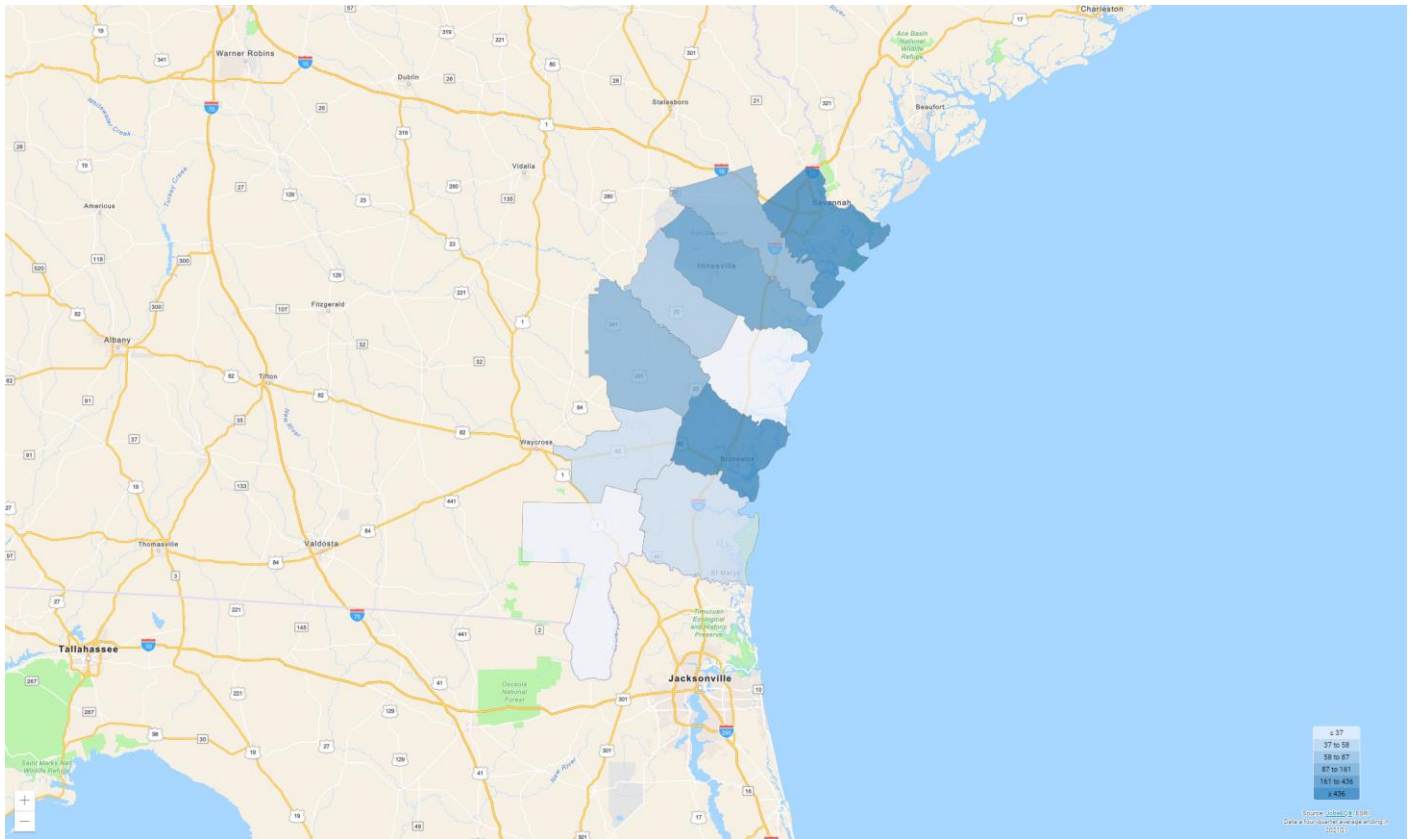
Staffing Pattern



6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Heavy and Tractor-Trailer Truck Drivers	1,289	\$47,100	154
Laborers and Freight, Stock, and Material Movers, Hand	379	\$32,700	57
Cargo and Freight Agents	293	\$44,200	32
Customer Service Representatives	134	\$33,400	18
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	128	\$47,100	18
Aircraft Mechanics and Service Technicians	126	\$61,000	12
General and Operations Managers	114	\$108,400	11
Light Truck Drivers	98	\$37,100	12
First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	93	\$57,100	11
Office Clerks, General	91	\$34,800	11
Remaining Component Occupations	1,624	\$56,800	181
Total	4,369		

 The mix of occupations points to the ability of a region to support an industry and its flexibility to adapt to future demand. Industry wages are a component of the cost of labor for regional employers.

Geographic Distribution



Region	Empl	Region	Empl
Chatham County, Georgia	3,423	Long County, Georgia	59
Glynn County, Georgia	436	Camden County, Georgia	50
Liberty County, Georgia	161	Brantley County, Georgia	37
Wayne County, Georgia	109	McIntosh County, Georgia	13
Bryan County, Georgia	88	Charlton County, Georgia	12

Source: JobsEQ®



A geographic concentration of firms in related fields of business may reduce production costs, attract more suppliers and customers, and increase supply and demand for specialized labor, but may also increase competitive pressure and drive down prices.

Employment Distribution by Type

The table below shows the employment mix by ownership type for Transportation and Logistics (US Cluster Mapping) for the Southeast Georgia Alliance. Four of these ownership types — federal, state, and local government and the private sector — together constitute “Covered Employment” (employment covered by the Unemployment Insurance programs of the United States and reported via the Quarterly Census of Employment and Wages).

“Self-Employment” refers to unincorporated self-employment and represents workers whose primary job is self-employment (that is, these data do not include workers whose primary job is a wage-and-salary position that is supplemented with self-employment).



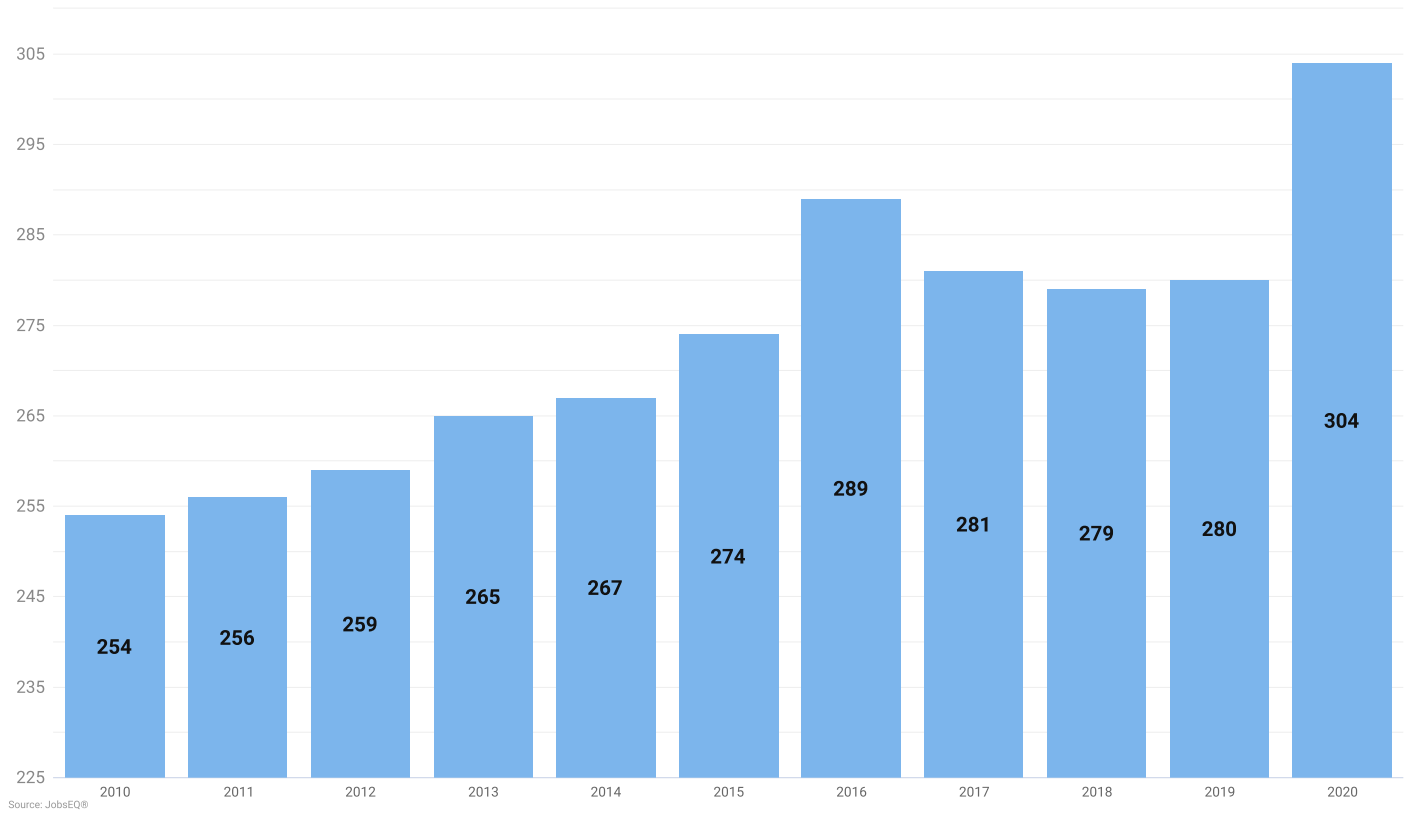
	Empl	%
Private	3,777	86.1%
Self-Employment	301	6.9%
State Government	265	6.0%
Federal Government	45	1.0%
Other Non-Covered	0	0.0%


Source: JobsEQ®

 Strong entrepreneurial activity is indicative of growing industries. Using self-employment as a proxy for entrepreneurs, a higher share of self-employed individuals within a regional industry points to future growth.

Establishments

In 2020, there were 304 Transportation and Logistics (US Cluster Mapping) establishments in the Southeast Georgia Alliance (per covered employment establishment counts), an increase from 254 establishments ten years earlier in 2010.





 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business activity takes place, and with at least one employee.

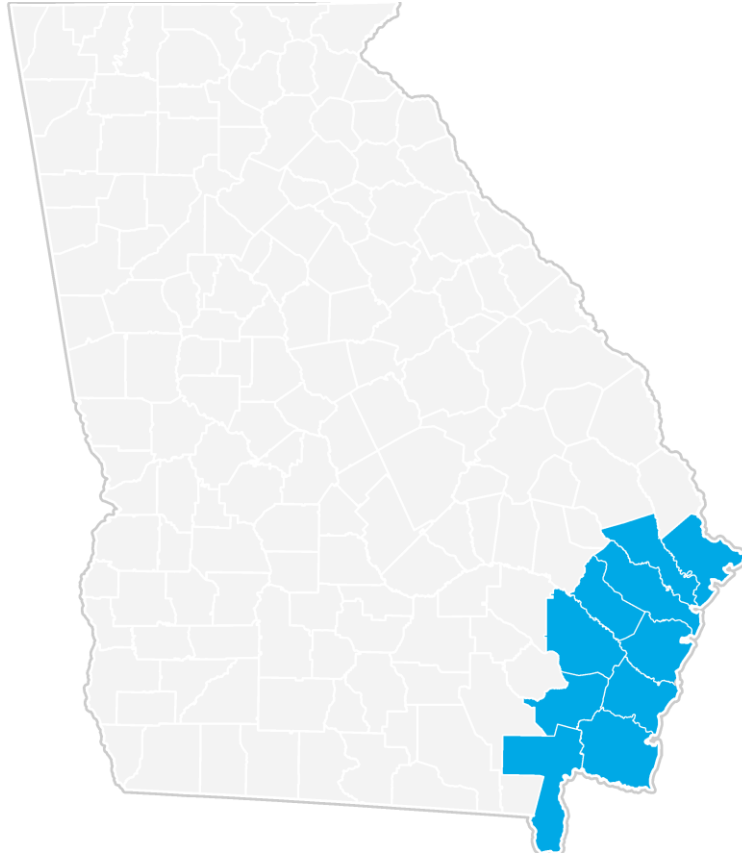
Postsecondary Programs Linked to Transportation and Logistics (US Cluster Mapping)

Program	Awards
Savannah College of Art and Design	
Apparel and Textile Marketing Management.	179
Digital Communication and Media/Multimedia.	422
Information Technology Project Management.	56
Savannah Technical College	
Accounting Technology/Technician and Bookkeeping.	53
Aircraft Powerplant Technology/Technician.	81
Airframe Mechanics and Aircraft Maintenance Technology/Technician.	152
Avionics Maintenance Technology/Technician.	9
Logistics, Materials, and Supply Chain Management.	13
Truck and Bus Driver/Commercial Vehicle Operator and Instructor.	191
Welding Technology/Welder.	179

Source: [JobsEQ®](#)

-  The number of graduates from postsecondary programs in the region identifies the pipeline of future workers as well as the training capacity to support industry demand.
-  Among postsecondary programs at schools located in the Southeast Georgia Alliance, the sampling above identifies those most linked to occupations relevant to Transportation and Logistics (US Cluster Mapping). For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

Southeast Georgia Alliance Regional Map



Industry Definition

Transportation and Logistics (US Cluster Mapping) is defined as the following NAICS industries:

Code	Description
481111	Scheduled Passenger Air Transportation
481112	Scheduled Freight Air Transportation
481211	Nonscheduled Chartered Passenger Air Transportation
481212	Nonscheduled Chartered Freight Air Transportation
481219	Other Nonscheduled Air Transportation
484121	General Freight Trucking, Long-Distance, Truckload
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance
485210	Interurban and Rural Bus Transportation
485510	Charter Bus Industry
488111	Air Traffic Control
488119	Other Airport Operations
488190	Other Support Activities for Air Transportation
488210	Support Activities for Rail Transportation
488490	Other Support Activities for Road Transportation
488510	Freight Transportation Arrangement
488991	Packing and Crating
488999	All Other Support Activities for Transportation

Region Definition

Southeast Georgia Alliance is defined as the following counties:

Bryan County, Georgia

Glynn County, Georgia

Brantley County, Georgia

McIntosh County, Georgia

Liberty County, Georgia

Camden County, Georgia

Charlton County, Georgia

Long County, Georgia

Chatham County, Georgia

Wayne County, Georgia

Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2021Q1 and are based upon BLS QCEW data, imputed by Chmura where necessary, and supplemented by additional sources including Census ZBP data. Employment forecasts are modeled by Chmura and are consistent with BLS national-level 10-year forecasts.
- Occupation employment is as of 2021Q1 and is based on industry employment and local staffing patterns calculated by Chmura and utilizing BLS OES data. Occupation wages are per the BLS OES data and are as of 2020.
- GDP is derived from BEA data and imputations by Chmura. Productivity (output per worker) is calculated by Chmura using industry employment and wages as well as GDP and BLS output data. Supply chain modeling including purchases by industry are developed by Chmura.
- Postsecondary awards are per the NCES and are for the 2019-2020 academic year.
- Establishment counts are per the BLS QCEW data.
- Figures may not sum due to rounding.

FAQ

What is (LQ) location quotient?

Location quotient is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is annual demand?

Annual demand is a of the sum of the annual projected growth demand and separation demand. Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. Growth demand is the increase or decrease of jobs expected due to expansion or contraction of the overall number of jobs.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.