



Industry Spotlight

Aerospace & Defense

Southeast Georgia Alliance



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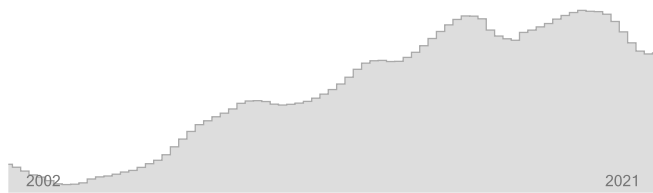
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Spotlight Summary

Aerospace & Defense
Southeast Georgia Alliance – 2021Q3

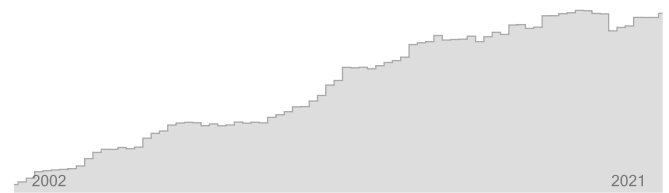
EMPLOYMENT



8,965

Regional employment / **618,008** in the nation

WAGES



\$107,497

Avg Wages per Worker / **\$109,567** in the nation

1.6% ↑

Avg Ann % Change Last 10 Years / **-0.1%** in the U.S.



3.3%

% of Total Employment / **0.4%** in the U.S.

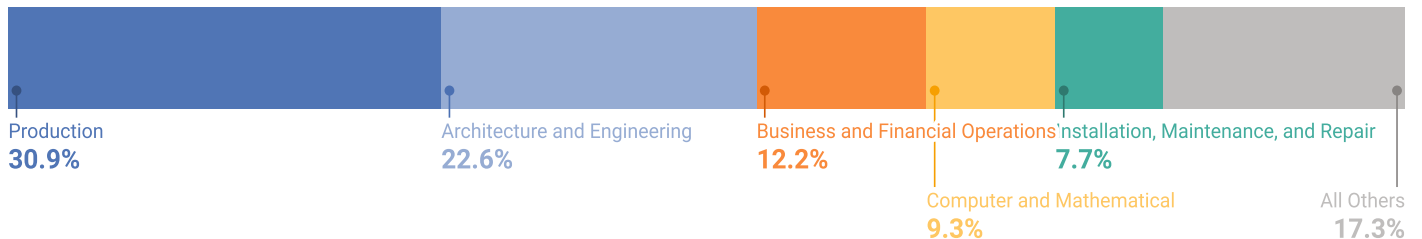


2.2% ↑

Avg Ann % Change Last 10 Years / **+1.9%** in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

1.6% ↑



Aircraft Manufacturing

-2.0% ↓



Guided Missile and Space Vehicle Manufacturing

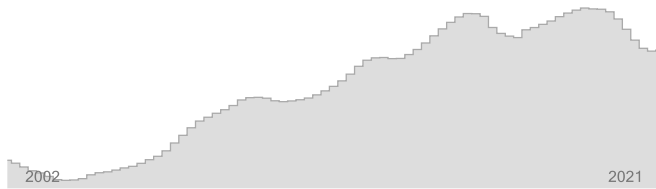
32.0% ↑



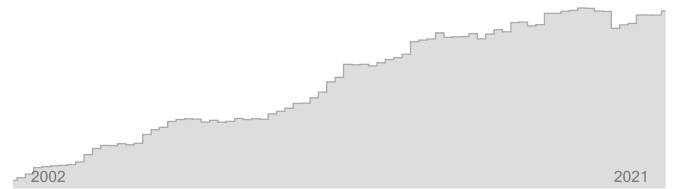
Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing

Industry Snapshot


EMPLOYMENT



WAGES

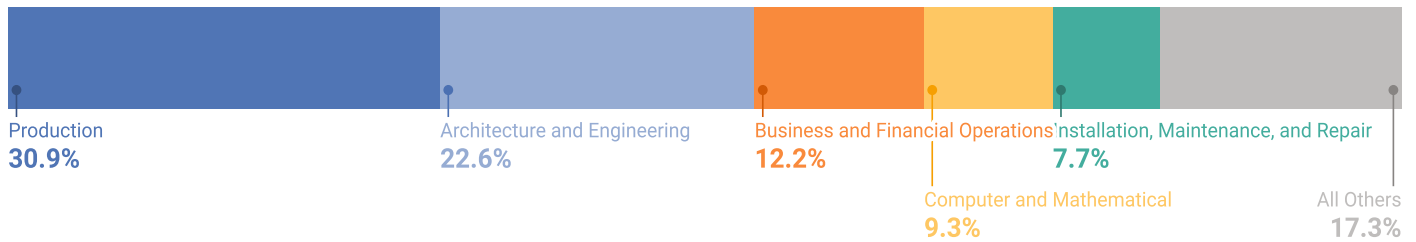


6-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
Aircraft Manufacturing	8,447	\$104,873	21.70		783	0.5%
Guided Missile and Space Vehicle Manufacturing	291	\$141,451	2.33		27	0.5%
Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing	188	\$124,758	7.62		17	0.5%
Other Aircraft Parts and Auxiliary Equipment Manufacturing	38	\$345,122	0.22		4	0.5%
Aircraft Engine and Engine Parts Manufacturing	1	\$74,792	0.00		0	0.1%
Aerospace & Defense	8,965	\$107,497	8.19		831	0.5%


 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.

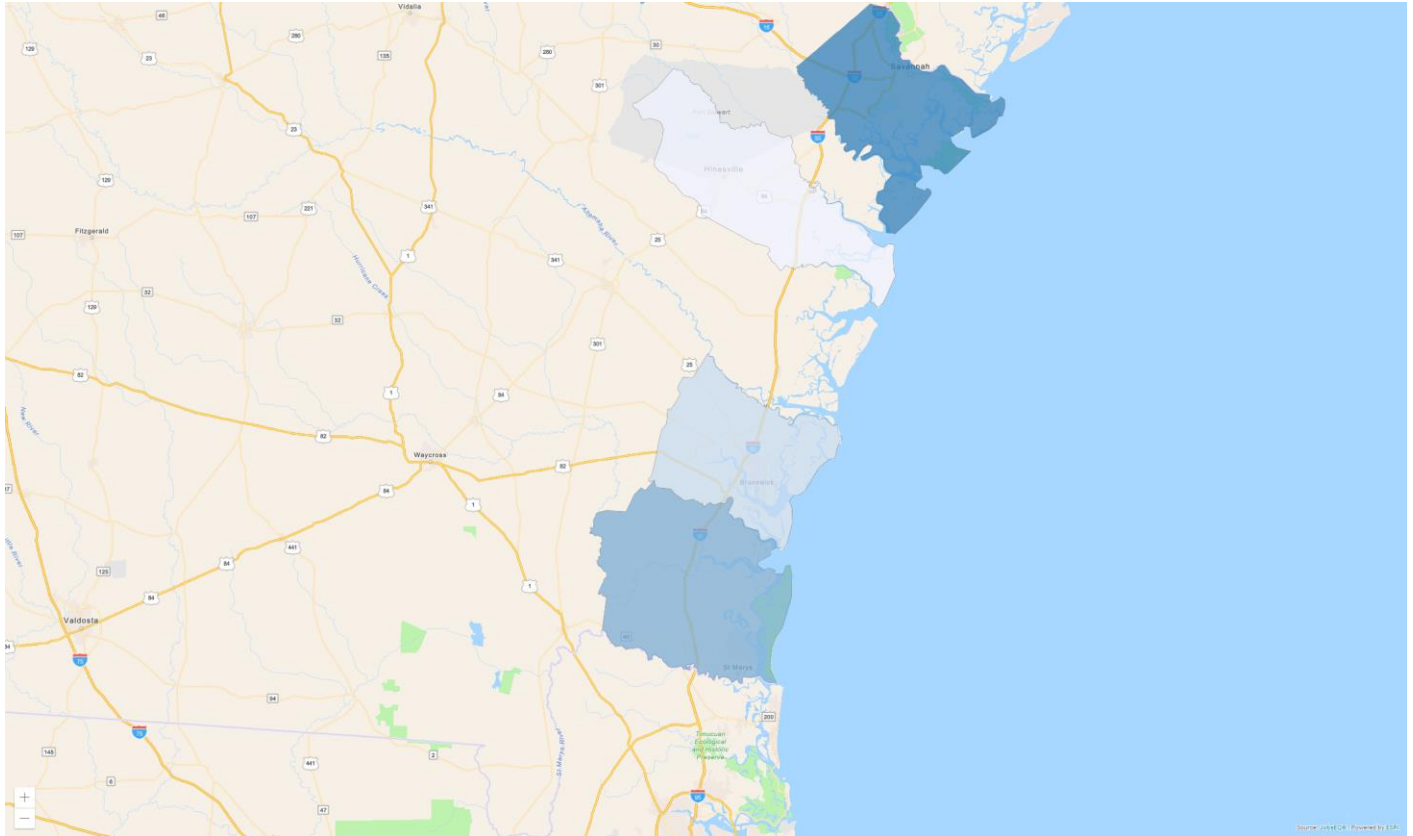
Staffing Pattern



6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	809	\$64,400	57
Software Developers and Software Quality Assurance Analysts and Testers	473	\$110,300	43
Industrial Engineers	459	\$90,400	42
Aerospace Engineers	428	\$119,600	32
Inspectors, Testers, Sorters, Samplers, and Weighers	421	\$48,300	45
Aircraft Mechanics and Service Technicians	295	\$65,300	27
Machinists	290	\$56,200	32
Engineers, All Other	263	\$110,000	21
Project Management Specialists and Business Operations Specialists, All Other	255	\$80,200	27
Team Assemblers	221	\$44,200	22
Remaining Component Occupations	5,036	\$70,300	515
Total	8,951		

 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	8,270	Glynn County, Georgia	79
Camden County, Georgia	614	Liberty County, Georgia	3

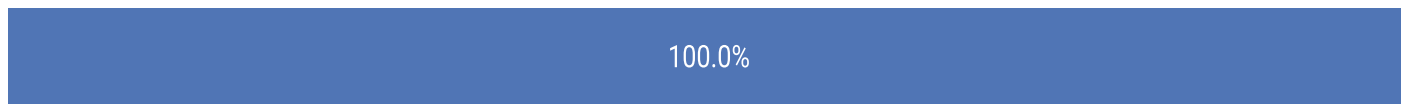
Source: JobsEQ®

💡 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 Aerospace & Defense 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).



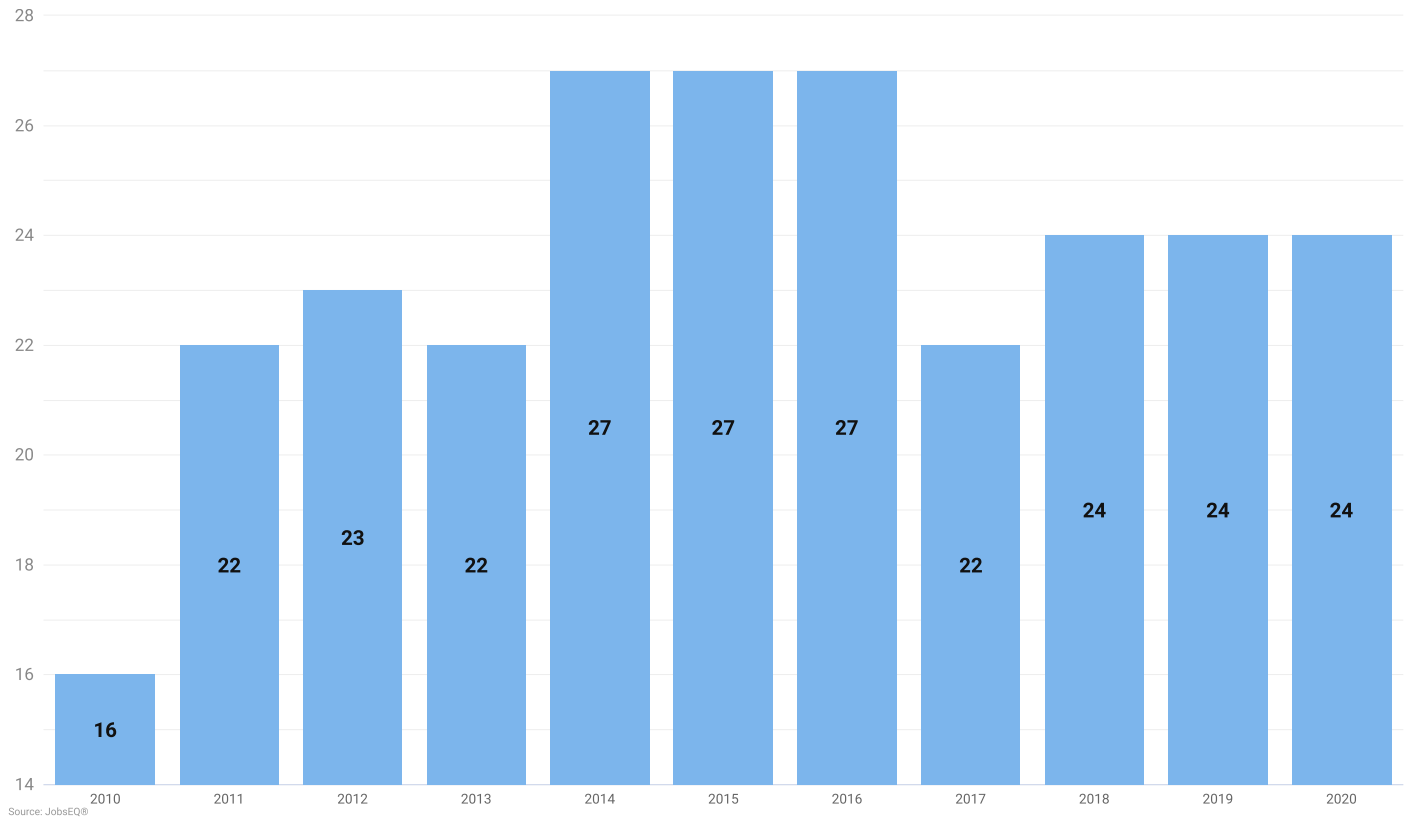
	Empl	%
■ Private	8,963	100.0%
■ Self-Employment	2	0.0%


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 24 Aerospace & Defense establishments in the Southeast Georgia Alliance (per covered employment establishment counts), an increase from 16 establishments ten years earlier in 2010.

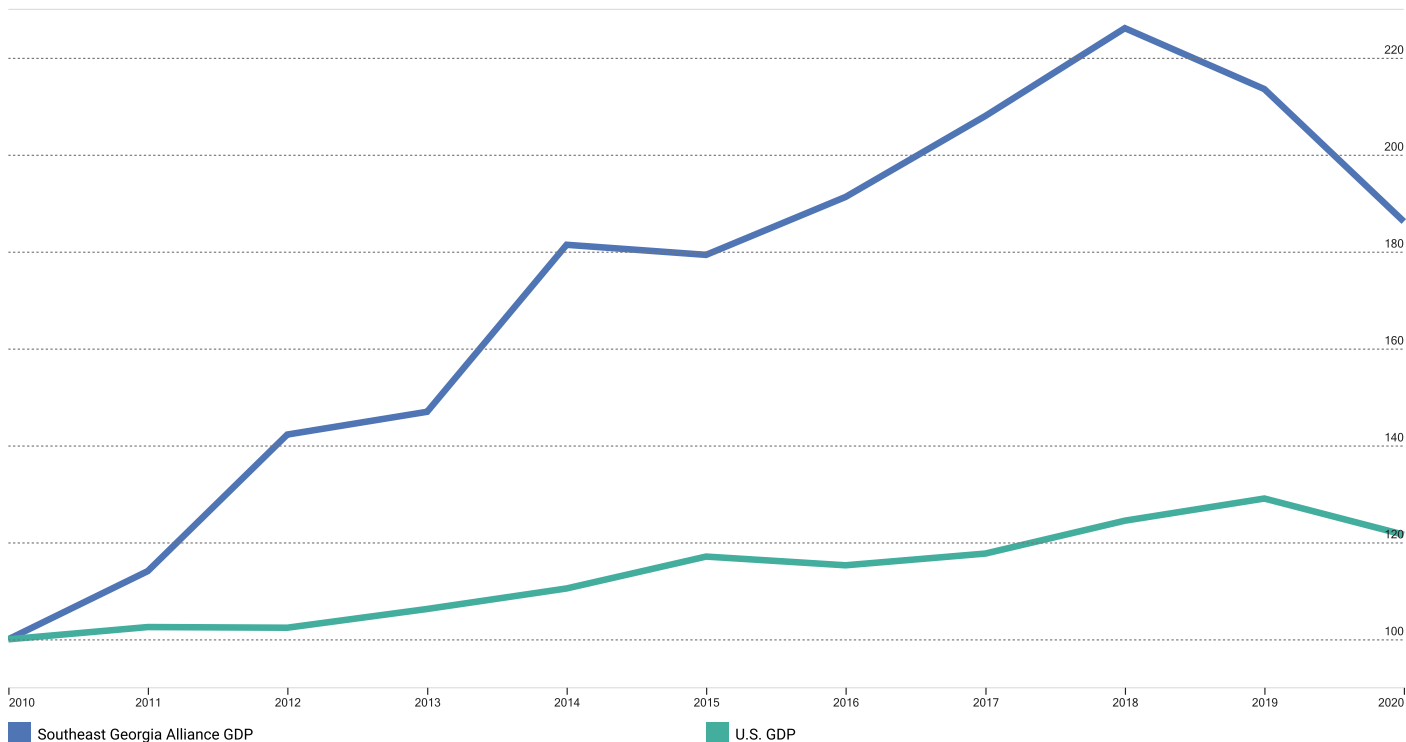


 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business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

GDP & Productivity

In 2020, Aerospace & Defense produced \$2.2 billion in GDP for the Southeast Georgia Alliance.

GDP: Indexed 2010 = 100



7.2 %

Industry Share of Total GDP /
0.8 % in the nation



6.4 % ↑

Avg Ann % Change Last 10 Yrs /
2.0 % in the nation



\$471k

Output per Worker /
\$532k in the nation




💡 Gross domestic product (GDP) is the most comprehensive measure of regional economic activity, and an industry's contribution to GDP is an important indicator of regional industry strength. It is a measure of total value-added to a regional economy in the form of labor income, proprietor's income, and business profits, among others.

💡 Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

Supply Chain: Top Suppliers

As of 2021Q3, Aerospace & Defense in the Southeast Georgia Alliance are estimated to make \$3.4 billion in annual purchases from suppliers in the United States with about 9% or \$0.3 billion of these purchases being made from businesses located in the Southeast Georgia Alliance.



6-digit Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Aircraft Engine and Engine Parts Manufacturing	\$235.0	\$523,096.0
Other Aircraft Parts and Auxiliary Equipment Manufacturing	\$20,710.0	\$390,220.0
Semiconductor and Related Device Manufacturing	<\$0.1	\$217,814.0
Corporate, Subsidiary, and Regional Managing Offices	\$19,677.0	\$183,034.0
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	<\$0.1	\$132,293.0
Remaining Supplier Industries	\$251,737.0	\$1,688,303.0
Total	\$292,359.0	\$3,134,760.0

 Supplier-buyer networks can indicate local linkages between industries, regional capacity to support growth in an industry, and potential leakage of sales out of the region.

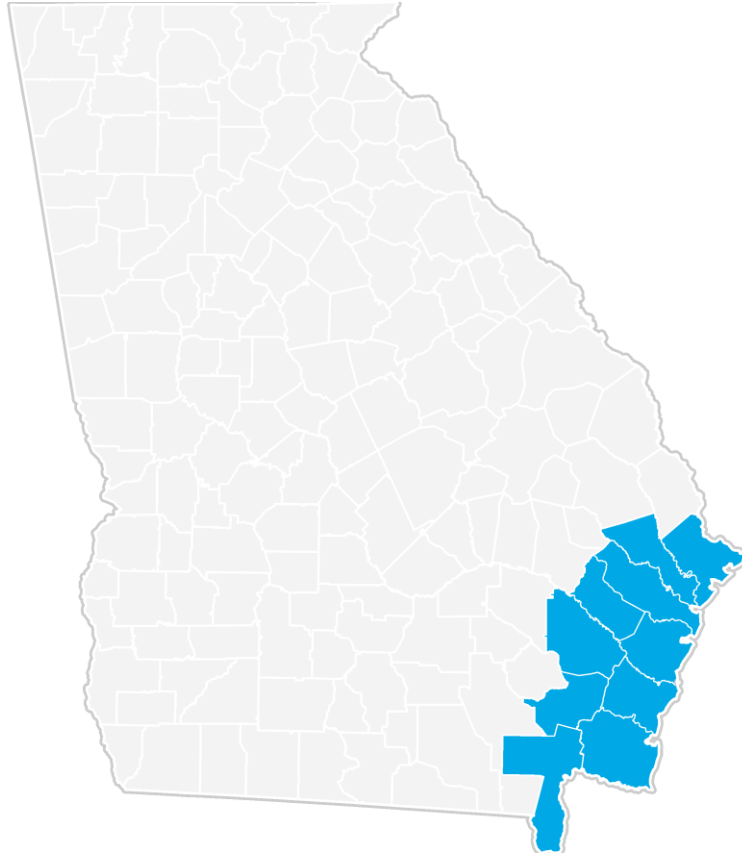
Postsecondary Programs Linked to Aerospace & Defense

Program	Awards
Savannah College of Art and Design	
Animation, Interactive Technology, Video Graphics, and Special Effects	444
Apparel and Textile Marketing Management	179
Architectural and Building Sciences/Technology	100
Digital Communication and Media/Multimedia	422
Manufacturing Engineering	21
Savannah Technical College	
Aircraft Powerplant Technology/Technician	81
Airframe Mechanics and Aircraft Maintenance Technology/Technician	152
Avionics Maintenance Technology/Technician	9
Industrial Technology/Technician	18
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 Aerospace & Defense. For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

Southeast Georgia Alliance Regional Map



Industry Definition

Aerospace & Defense is defined as the following NAICS industries:

Code	Description
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing
336411	Aircraft Manufacturing
336412	Aircraft Engine and Engine Parts Manufacturing
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing
336414	Guided Missile and Space Vehicle Manufacturing
336415	Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing
336419	Other Guided Missile and Space Vehicle Parts and Auxiliary Equipment Manufacturing

Region Definition

Southeast Georgia Alliance is defined as the following counties:

Brantley County, Georgia

Bryan County, Georgia

Camden County, Georgia

Charlton County, Georgia

Chatham County, Georgia

Glynn County, Georgia

Liberty County, Georgia

Long County, Georgia

McIntosh County, Georgia

Wayne County, Georgia

Data Notes

- Industry employment and wages (including total regional employment and wages) are as of 2021Q3 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 2021Q3 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.