



Industry Spotlight

Aviation & Aerospace

Southeast Georgia Alliance



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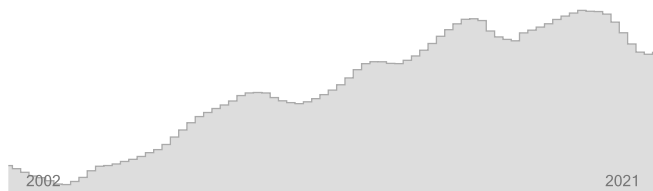
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Spotlight Summary

Aviation & Aerospace
Southeast Georgia Alliance – 2021Q3

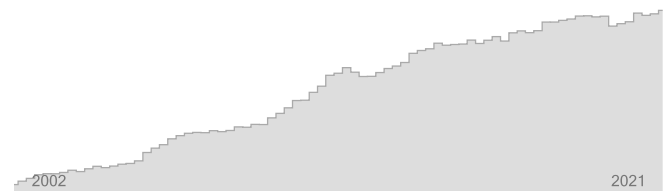
EMPLOYMENT



9,597

Regional employment / **1,072,897** in the nation

WAGES



\$99,864

Avg Wages per Worker / **\$92,346** in the nation

1.6% ↑

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



3.5%

% of Total Employment / **0.7%** in the U.S.

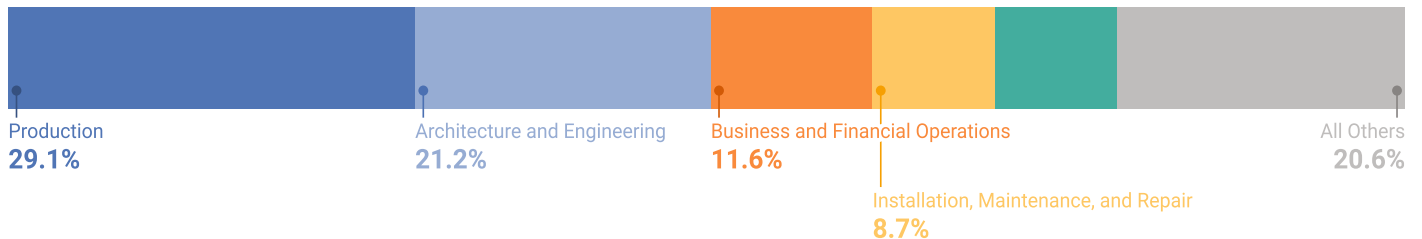


1.8% ↑

Avg Ann % Change Last 10 Years / **+2.4%** in the U.S.



TOP OCCUPATION GROUPS



TOP INDUSTRIES

Avg Ann % Change in Employment, Last 10 Years

1.6% ↑



Aerospace Product and Parts Manufacturing

1.3% ↑



Airport Operations

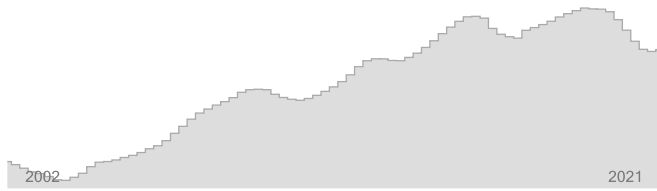
1.1% ↑



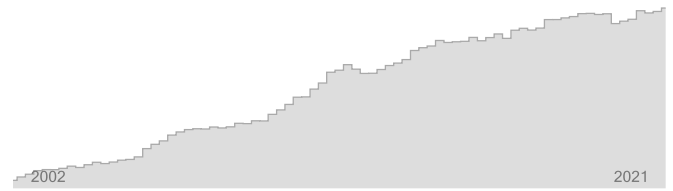
Scheduled Air Transportation

Industry Snapshot


EMPLOYMENT



WAGES

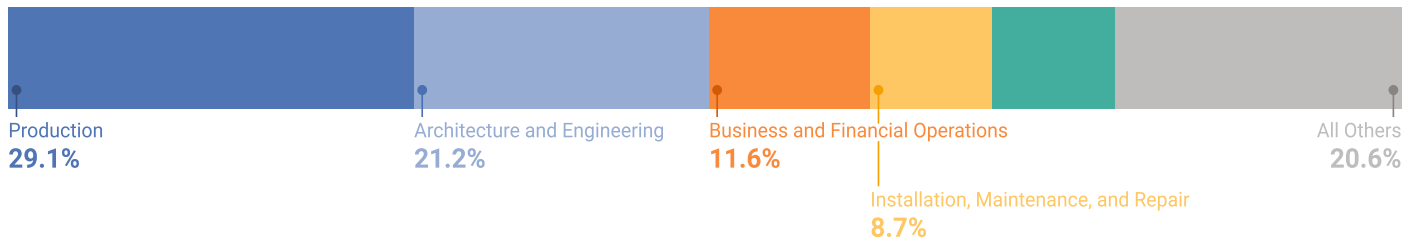


5-Digit Industry	Empl	Avg Ann Wages	LQ	5yr History	Annual Demand	Forecast Ann Growth
Aerospace Product and Parts Manufacturing	8,965	\$103,707	10.43		831	0.5%
Airport Operations	469	\$40,504	2.03		59	2.2%
Scheduled Air Transportation	133	\$44,672	0.19		16	2.0%
Nonscheduled Air Transportation	30	\$124,988	0.32		3	0.9%
Aviation & Aerospace	9,597	\$99,864	5.05		910	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.

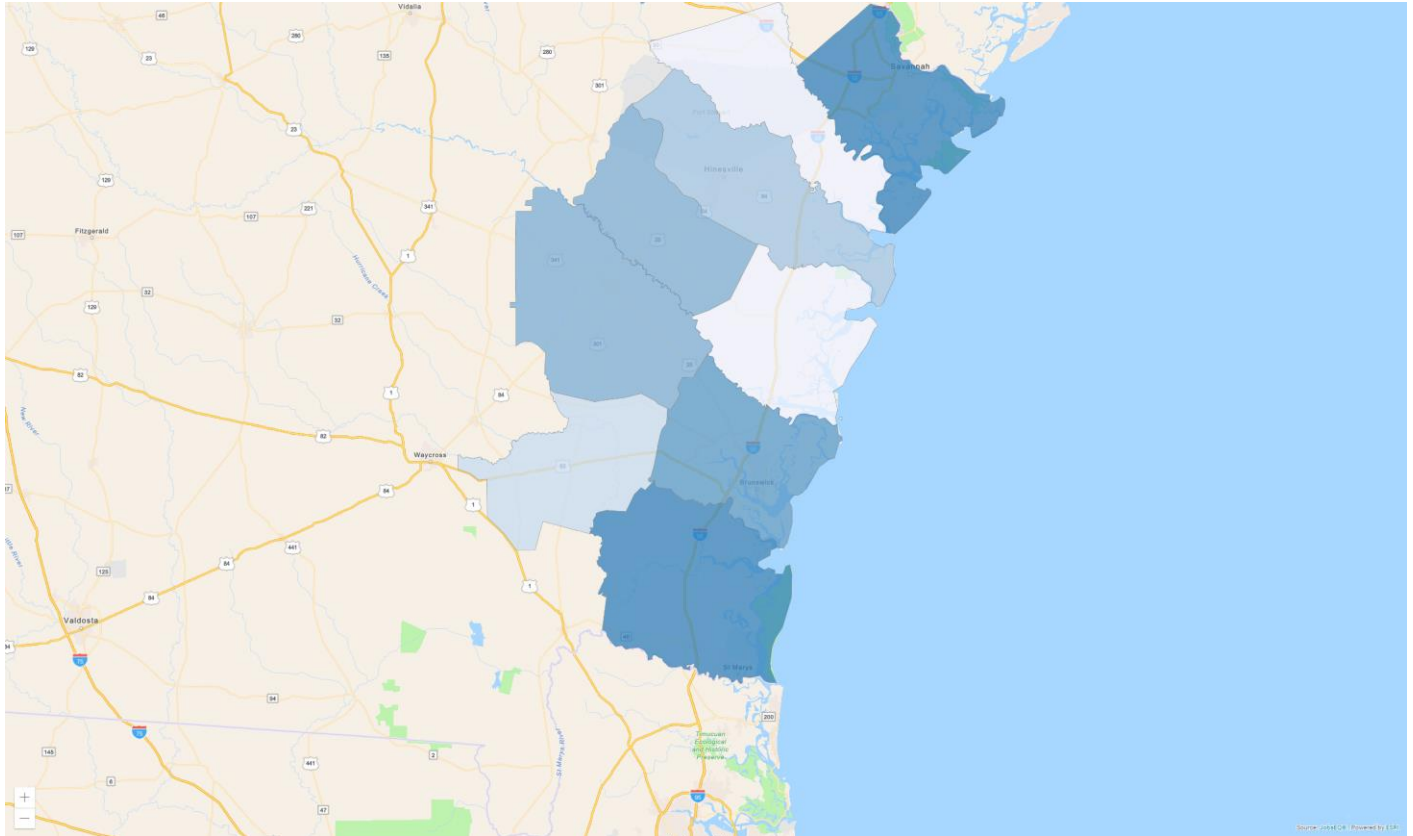
Staffing Pattern



6-digit Occupation	Empl	Avg Ann Wages	Annual Demand
Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	813	\$64,400	58
Software Developers and Software Quality Assurance Analysts and Testers	475	\$110,200	43
Industrial Engineers	460	\$90,400	42
Aerospace Engineers	433	\$119,400	32
Inspectors, Testers, Sorters, Samplers, and Weighers	427	\$48,200	46
Aircraft Mechanics and Service Technicians	396	\$64,400	38
Machinists	291	\$56,200	33
Engineers, All Other	264	\$109,900	21
Project Management Specialists and Business Operations Specialists, All Other	259	\$79,900	28
Team Assemblers	222	\$44,200	22
Remaining Component Occupations	5,540	\$68,000	586
Total	9,581		

 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	8,618	Liberty County, Georgia	8
Camden County, Georgia	636	Brantley County, Georgia	6
Glynn County, Georgia	191	McIntosh County, Georgia	5
Wayne County, Georgia	102	Bryan County, Georgia	4
Long County, Georgia	27		

Source: JobsEQ®

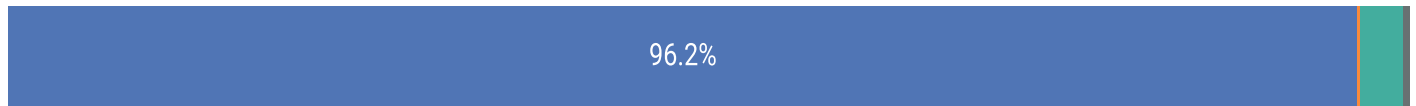


A geographic concentration of firms in related fields of business may reduce production costs, attract more suppliers and customers, and increase supply and demand for specialized labor, but may also increase competitive pressure and drive down prices.

Employment Distribution by Type

The table below shows the employment mix by ownership type for Aviation & Aerospace 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).



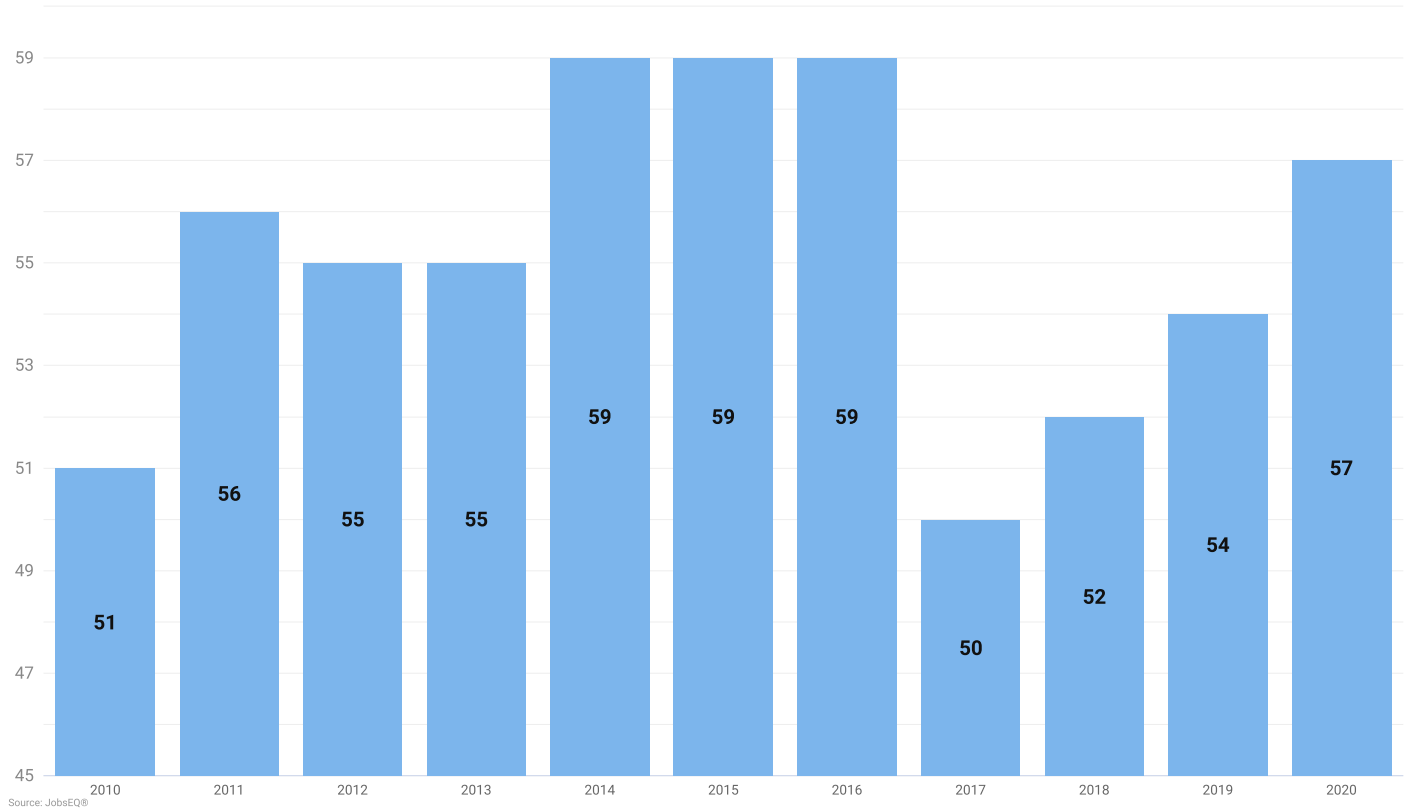
	Empl	%
Private	9,236	96.2%
Self-Employment	19	0.2%
Local Government	0	0.0%
State Government	301	3.1%
Federal Government	43	0.4%


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 57 Aviation & Aerospace establishments in the Southeast Georgia Alliance (per covered employment establishment counts), an increase from 51 establishments ten years earlier in 2010.

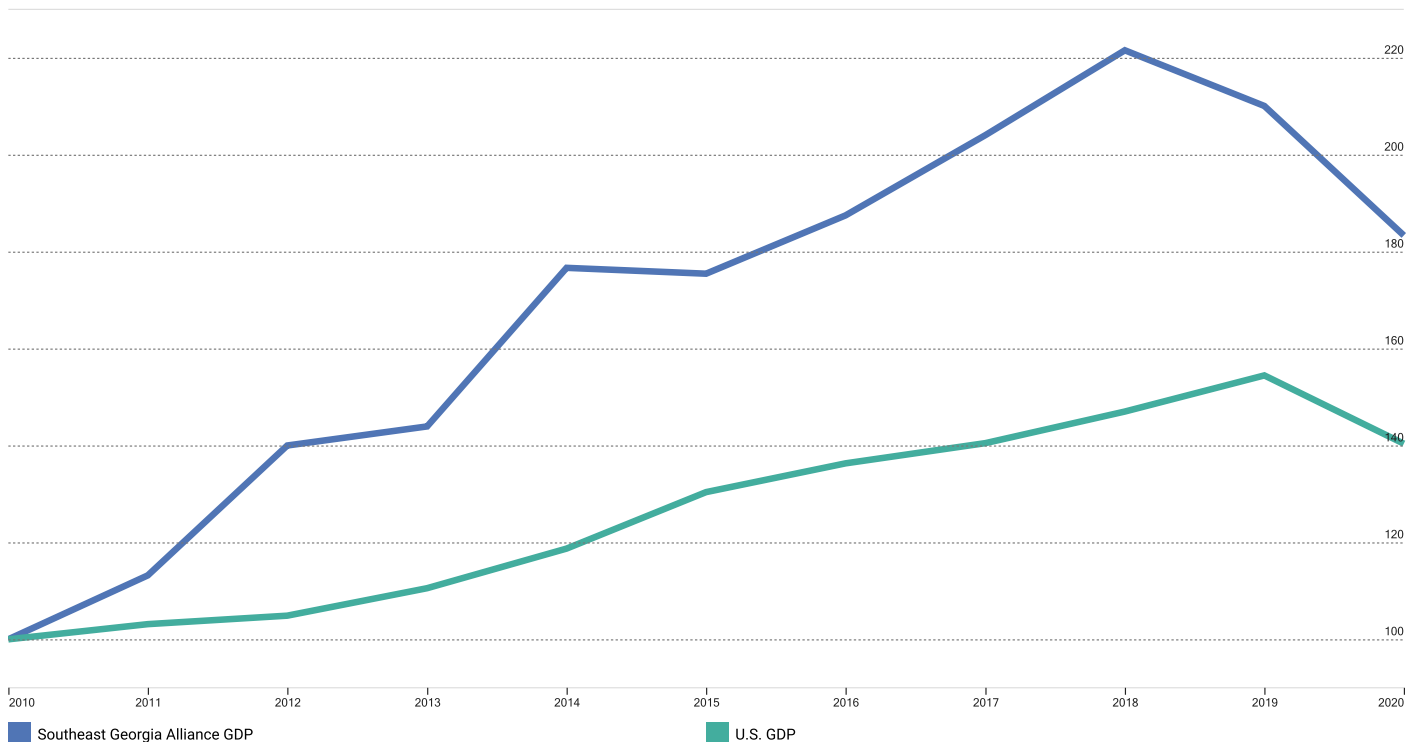


 New business formations are an important source of job creation in a regional economy, spurring innovation and competition, and driving productivity growth. Establishment data can provide an indicator of growth in businesses by counting each single location (such as a factory or a store) where business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

GDP & Productivity

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

GDP: Indexed 2010 = 100



7.4 %

Industry Share of Total GDP /
1.3 % in the nation



6.2 % ↑

Avg Ann % Change Last 10 Yrs /
3.4 % in the nation



\$450k

Output per Worker /
\$438k 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, Aviation & Aerospace in the Southeast Georgia Alliance are estimated to make \$3.5 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.



5-digit Supplier Industries	Purchases from In-Region (\$000s)	Purchases from Out-of-Region (\$000s)
Aerospace Product and Parts Manufacturing	\$131,474.0	\$955,363.0
Semiconductor and Other Electronic Component Manufacturing	\$41.0	\$269,465.0
Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	\$6,906.0	\$237,551.0
Management of Companies and Enterprises	\$21,673.0	\$189,489.0
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	<\$0.1	\$92,637.0
Remaining Supplier Industries	\$147,895.0	\$1,433,574.0
Total	\$307,989.0	\$3,178,079.0

 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.

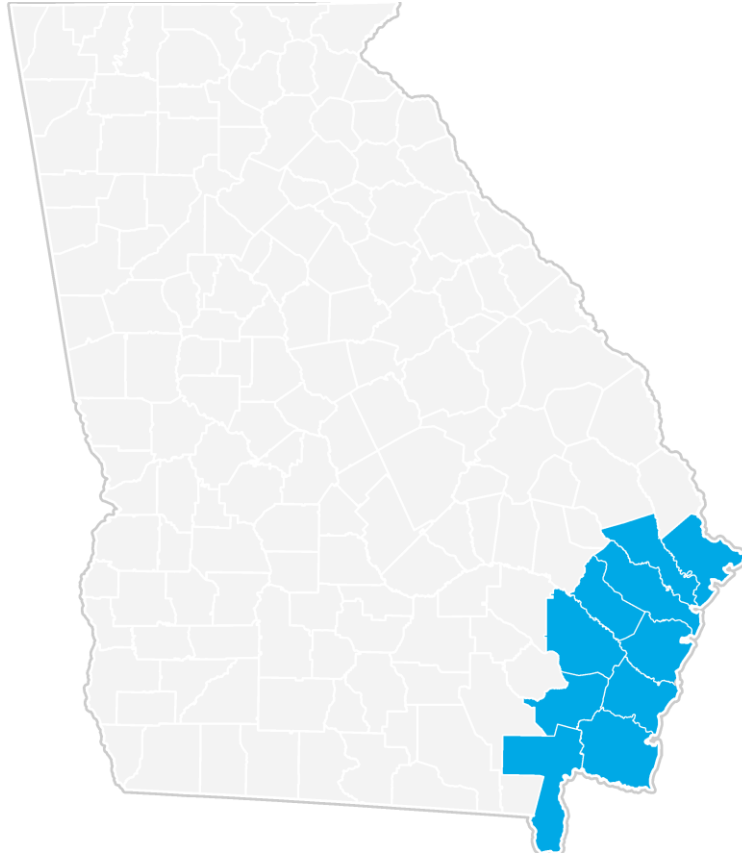
Postsecondary Programs Linked to Aviation & Aerospace

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 Aviation & Aerospace. For a complete list see JobsEQ®, <http://www.chmuraecon.com/jobseq>

Southeast Georgia Alliance Regional Map



Industry Definition

Aviation & Aerospace is defined as the following NAICS industries:

Code	Description
33641	Aerospace Product and Parts Manufacturing
48111	Scheduled Air Transportation
48121	Nonscheduled Air Transportation
48811	Airport Operations

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.