



**ECONOMIC
DEVELOPMENT
ELEMENT**

03



ECONOMIC DEVELOPMENT

Introduction

The Economic Development Element of Garden City 2040 is an inventory and assessment of the community's economic base, labor force characteristics, and economic development opportunities and resources. The goal of this element is to explain the foundation of Garden City's economy, and the city's relationship to the Savannah Metropolitan Statistical Area (MSA) in order to provide a complete picture of the area's employees, the largest industries, and the possible future direction of the economy. It attempts to determine the community's needs and goals in light of population trends, natural resources, housing, and land use in order to develop a strategy for the economic well-being of the community.

REGIONAL ECONOMY

Savannah MSA

According to the U.S. Census Bureau, a metropolitan statistical area (MSA) refers to cities where adjacent communities are socially and economically interconnected. The city of Savannah acts as an anchor to other communities throughout Chatham, Effingham, and Bryan Counties. The jurisdictions, employees, and employers within the MSA all have an impact on each other. For example, many residents live in Garden City and work in Savannah and vice versa. Being the third largest MSA in Georgia (behind the Atlanta MSA and Augusta MSA), the Savannah Metropolitan Statistical Area is home to a variety of industries and an estimated population of over 400,000 people.

The economic development element will not only discuss the economy within Garden City, but also the impact of Garden City on the Savannah MSA

Because Garden City is economically connected to jurisdictions throughout the MSA, a discussion of major industries, economic opportunities, and economic changes within the Savannah MSA as a whole will be discussed.



METROPOLITAN STATISTICAL AREA (MSA)

A MSA is a geographical region with a relatively high population density at its core and close economic ties throughout the area. The city of Savannah acts as an anchor to other communities throughout Chatham, Effingham, and Bryan Counties.

—Census Bureau



Figure 3.1–Savannah MSA

LABOR FORCE CHARACTERISTICS



Labor Force Characteristics

According to the Bureau of Labor Statistics, the labor force is defined as all people above the age of 16 who are working or actively looking for work. This section will specifically address the key characteristics of the labor force in Garden City and the Savannah MSA, ranging from the size of the labor force to their level of education.

Employment

The Savannah MSA has a labor force of almost 189,000 people, with an unemployment rate that typically hovers around 3% according to a 2020 report from the Georgia Department of Labor. During the pandemic, the unemployment rate skyrocketed to over 15% in April of 2020 and had since settled to an unemployment rate of 5.6% in December of 2020. Before the pandemic, the unemployment rate had been consistently declining. In December of 2019, the unemployment rate shrunk to 2.7% according to the Georgia Department of Labor. Prior to the decline in the economy caused by the COVID-19 pandemic, Savannah's economy showed consistent improvement, with the number of employed residents in the area steadily increasing since 2009, while the unemployment rate consistently decreased during that same period. It is anticipated that the unemployment rate will again show a decrease once the economy begins to recover from the worldwide impacts of COVID-19.

LABOR FORCE

The labor force is defined as all people above the age of 16 who are working or actively looking for work. This section will specifically address the key characteristics of the Savannah MSA's labor force.

—Bureau of Labor Statistics



In 2019, Garden City had a labor force of a little over 3,900 people, accounting for around 2% of the entire labor force in the MSA. With a 2019 unemployment rate of 3.9 that later jumped to 8.5 in 2020 (due to COVID-19), Garden City, on average, experienced slightly higher unemployment compared with the Savannah MSA during the same time frame. Similar to the MSA, the unemployment rate has also been decreasing for Garden City and will continue to decline as the pandemic continues to subside.

Average Unemployment Rates

Year	GARDEN CITY	SAVANNAH MSA
	%	%
2013	10.0%	8.0%
2014	9.2%	7.1%
2015	7.1%	5.8%
2016	6.2%	5.2%
2017	5.0%	4.4%
2018	4.3%	3.7%
2019	3.9%	3.3%
2020	8.5%	7.0%

Figure 3.2—Average Unemployment Rates, Garden City & Savannah MSA
Georgia Department of Labor



Educational Attainment

Education is an important factor in the economy as it can provide insight into the skill base of the labor force. Understanding the skillset of the population can lead to creating better strategies for attracting industries or identifying a gap in skills that can be filled through educational programs. For example, if it is found that a large portion of the labor force has a degree in engineering, the area will be better able to attract engineering firms that can then hire that employment base. Conversely, if there is a lack of technology skills in the labor force, prioritizing tech programs and training can increase the labor base, and thereby contribute to attracting more technology-based businesses.

High School

For the 2019–2020 school year, the Savannah Chatham County Public School System (SCCPSS) statistics show that

In Garden City, around 83% of residents 25 or older has a high school diploma or GED equivalent. Another 13% of residents has a Bachelor's degree or higher according to the American Community Survey, 2018

Key Points: SY 2019–20 Graduation Rate

- SCPSS achieved a graduation rate of 89.7%. This represents a gain of nearly two points compared with the previous year and establishes a new record high for the District
- The District has consistently improved the graduation rate since SY 2014–15 and exceeded the 2019–20 annual target rate of 85.7%

For the sixth consecutive year the district exceeded both the state and the comparison group graduation rates. In 2018–19 and 2019–20 school years, SCPSS earned the highest graduation rate within the comparison group.

It should be noted that these statistics are only for the Chatham County public school system (SCCPSS), and do not reflect Effingham or Bryan County's schools, which are also within the Savannah MSA.

ARE YOU LOOKING FOR MORE INFORMATION ON EDUCATION?

For more information see the Quality of Life Element under Education page 250



Four-Year Education Focus Areas

According to the 2019 American Community Survey 5-Year Estimates, around 35% of adults aged 18–64 in the Savannah MSA have a bachelor’s degree or higher. There are a variety of majors available at the many higher education institutions in the area, and the breakdown shown in Figure 3.3 of college majors students choose reflects that variety.

The most common major for residents 25 or older is in Science and Engineering followed closely by Arts, Humanities and Others, and Business.

The majors that have the highest share of students also reflect some of the current businesses and institutions that make up the Savannah MSA economy. For example, there is a large presence of healthcare and aerospace businesses, which could explain why the Science, Engineering, and related fields have a higher share of students.

The presence of a world-renowned art institution, Savannah College of Art and Design, as well as the entertainment industry, could contribute to the Arts, Humanities and Others field also having a high share of students.

First College Major for Residents 25 or Older

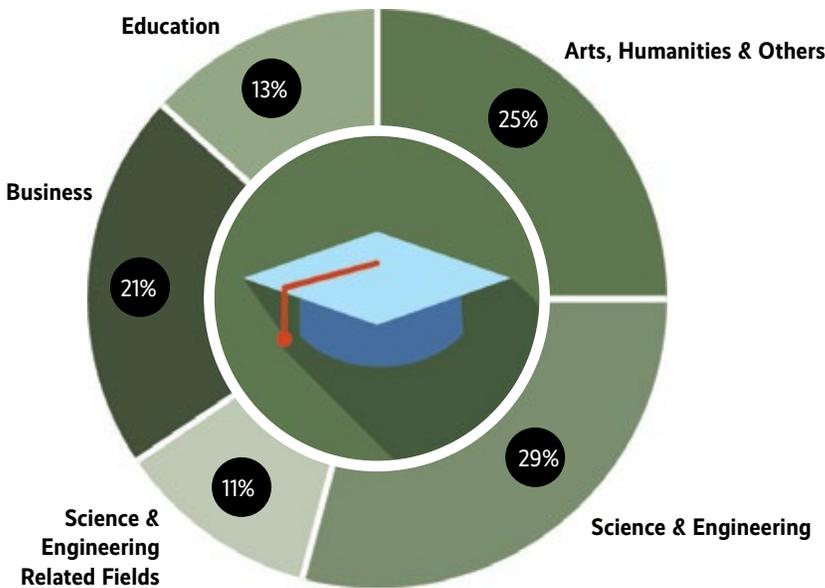


Figure 3.3—First College Major for Residents 25 or Older, Savannah MSA
U.S. Census Bureau: 2019 American Community Survey 5-Year Estimates



Two-Year Technical College Focus Areas

Technical school or college is a form of higher education that offers two-year degrees. This form of degree program is beneficial as it provides residents a more flexible and less expensive way to further their education compared to the four-year institution. Technical schools offer specialized occupational schooling so students can gain specific skills that apply directly to the workforce.

Savannah Technical College offers a diverse selection of technical degrees, with some degree fields growing more than others. Broadly speaking, the programs experiencing the most growth are manufacturing, drafting technician, and healthcare related programs. Similar to the four-year college majors discussed above, the largest programs also reflect the existing economy, in which healthcare, manufacturing, engineering, and construction have a large presence.

This data is important to note for Garden City, especially since industries, such as aviation, trucking transportation, and construction, which align with some of the highest growing degree programs, also have a high presence in the area

Some of the programs with the greatest decline, such as Mechanical CAD Drafters and Nursing Aides, are also a part of fields with major growth. This could suggest that there are changes in these job fields influencing students to pursue specific programs over others.

One area that is declining but that may benefit the overall economy is “Cinematography and Film/Video Production.” Not only is this field growing in the area, but it also has a large presence in the area, as Georgia is the number one state in the US in film production. Because more studios choose to film in Savannah, film production has also been identified as a potential economic driver by the Savannah Economic Development Authority. This field has the potential to bring more money into the economy and provide high paying, skilled jobs. According to the Savannah Area Chamber of Commerce, direct spending related to the film industry was \$2.9 billion in 2019. Trends suggest that surrounding schools with film related programs should consider promoting and expanding these programs.



Plan 2040 Survey

Forty-eight percent (48%) of the respondents felt that developing a skilled work force through training programs, recruitment, and continuing education was very important.

A full copy of the survey and the results can be found in the Garden City 2040 Appendix.



Technical Programs with the Highest Growth in Graduates

Program	TOTAL GRADUATES		PERCENT CHANGE 2018–2019
	2018	2019	%
Airframe Mechanics and Aircraft Maintenance Technology/Technician	50	94	88.0
Barbering/Barber	5	13	160.0
CAD/CADD Drafting and/or Design Technology/Technician	8	18	200.0
Construction Management	22	43	95.5
Criminal Justice/Police Science	25	42	68.0
Drafting and Design Technology/Technician, General	8	12	50.0
Food Preparation/Professional Cooking/Kitchen Assistant	60	81	35.0
Licensed Practical/Vocational Nurse Training	14	23	64.3
Machine Shop Technology/Assistant	21	29	38.1
Medical Insurance Coding Specialist	32	48	50.0
Medical/Clinical Assistant	7	10	42.9
Solar Energy Technology/Technician	28	39	39.3
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	167	227	37.1

Figure 3.4–Technical Program Growth Rates, Savannah MSA
Georgia Department of Labor (GDOL), 2018-2019

Technical Programs with the Highest Decline in Graduates

Program	TOTAL GRADUATES		PERCENT CHANGE 2018–2019
	2018	2019	%
Accounting Technology/Technician and Bookkeeping	34	22	-35.3
Autobody/Collision and Repair Technology/Technician	16	3	-81.3
Cinematography and Film/Video Production	49	22	-55.1
Electrical, Electronic and Communications Engineering/Technician	10	6	-40.0
Fire Science/Firefighting	16	11	-31.3
Fire Services Administration	5	1	-80.0
Hospitality Administration/Management/Personnel Administration	7	3	-57.2
Industrial Mechanics and Maintenance Technology	80	52	-35.0
Legal Assistant/Paralegal	10	6	-40.0
Mechanical Drafting and Mechanical Drafting CAD/CADD	5	2	-60.0
Nursing Assistant/Aide and Patient Care Assistant/Aide	319	158	-50.5
Teacher Assistant/Aide	3	2	-33.3

Figure 3.5–Technical Program Decline Rates, Savannah MSA
Georgia Department of Labor (GDOL), 2018-2019



EDUCATION & LOCAL JOB ENVIRONMENT

Education is a powerful tool for economic advancement. It is one of the most effective ways to reduce poverty and increase earnings. For example, according to the Bureau of Labor Statistics, people with more education tend to have a higher weekly income and lower unemployment. While there are still economic issues related to education, such as student loans and a lack of access due to price or transportation and child care challenges for lower income residents, it demonstrates that having more education opens the door for more job opportunities. Because of this, investment in education programs, especially those that are relevant to the local job market, is a necessary strategy to reducing the ever-present state of high poverty in the area.

Savannah Tech is an example of an institution that is offering degree programs in industries that exist locally, including the newly created Logistics degree program.

Earnings and Unemployment Rates by Educational Attainment in the U.S., 2020

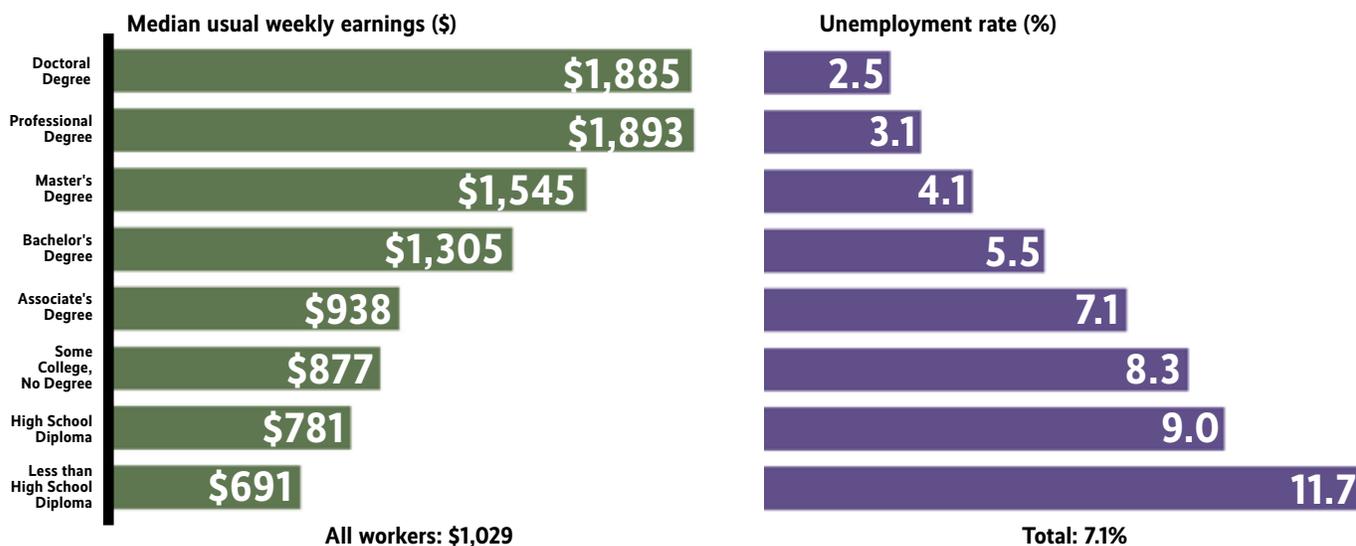


Figure 3.6—Earnings & Unemployment Rates by Educational Attainment, 2020
U.S. Bureau of Labor Statistics, Current Population Survey

ECONOMIC BASE

The Savannah MSA has a diverse economic base similar to that of many coastal areas. Employment is highest in the service, retail trade, and manufacturing sectors. The largest manufacturing facilities in the MSA produce textiles, paper products, chemicals, transportation equipment, and food products. Retail trade establishments are located throughout downtown Savannah and in pockets throughout the county to provide for the daily needs of area residents. Regional shopping areas that attract customers from throughout the southeast can be found in West Chatham and Downtown Savannah.

Major employers in the service sector include the health care industry, the tourist industry, and educational institutions. St. Joseph's/Candler and Memorial Hospitals are the most visible component of the MSA's health care industry. Additional health care jobs are provided at clinics, nursing homes, laboratories, and the offices of doctors, dentists, and other health care practitioners. The healthcare field will continue to grow in the Chatham County region as the aging population count continues to rise. This is because elderly people are more likely to have a disability or weakened immune system.

Major educational institutions providing employment include the Savannah State University (SSU), South University, Georgia Southern University's Armstrong campus, Savannah Technical College, Savannah College of Art and Design, and the Chatham County Board of Education. Major businesses providing support for the tourist industry include hotels, restaurants, gift shops, and museums.



MAJOR ECONOMIC DRIVERS

Major Industries

The major industries of the Savannah MSA impact the local economy in a variety of ways, either by employing a large portion of the workforce and/or contributing a significant amount of money back to the local economy. This section will discuss the major economic drivers of the Savannah MSA and Garden City, with respect to their overall impact on the area.

Georgia Ports Authority & Logistics

Savannah's position geographically allows for a vibrant trading economy, in which imports can come directly to the port and be shipped to other nearby large metropolitan areas—which also contributes to the growing transportation industry. The Port of Savannah is the largest single container terminal in the United States, accounting for 21.6% of container trade on the east coast, and 12.2% of all container exports in the United States. The steady growth of the GPA has had a tremendous impact on the economy with no slowdowns predicted for the near future. This growth will also impact Garden City, as the Port has a large presence in the overall economy of the city. According to the Georgia Ports Authority, the Garden City Terminal is the largest and fastest growing container terminal in North America, as one of two deep water ports in the area. Port activity does not include ships alone, but also port supporting activities, such as transportation. Railways, such as the construction of the Mason Mega Rail project, will contribute to the economic and employment impact of the terminal. The rail project is currently under construction, and will increase reach to other major economic areas, such as Atlanta, Memphis, St. Louis, and Chicago.



IMPACTS OF GEORGIA PORTS AUTHORITY

- Garden City Terminal is the third busiest and fastest growing container handling facility in the U.S.
- The Port of Savannah handled 41.27 million tons of cargo in 2018
- In May 2021, the largest ship to ever dock on the east coast, the CMA GGM Marco Polo, the ship is 1,299 feet long
- In 2019, agriculture accounted for 60% of Savannah's exports



Manufacturing

Garden City enjoy a diversified manufacturing base. Products range from paper and forest products to chemicals, from construction equipment to food processing, and from corporate jets to drill bits. The significance of the manufacturing segment of the local economy cannot be overstated. Some of the largest employers and highest wage-earning workers are within the manufacturing segment. According to the Savannah Area Chamber, manufacturing firms accounted for 19% of the area's GDP. This already significant industry within the economy is set to grow more in the future.

Manufacturing expansion by companies like Medline Industries, Anatolia Tile+Stone, Plastics Express, Preci-Dip, A&R Logistics, and others will add at least 1,050 jobs over the coming years

Trucking & Transportation

The trucking industry is a major port support activity and is a significant part of the Garden City economy. With dozens of trucking companies in Garden City and the immediate Savannah area, not only can shipments from the nearby terminal be transported quickly on the nearby highways—which will ultimately help the overall port industry—it also provides a plethora of employment options for residents. Since this industry is growing, it will continue to benefit the entire area.



Creative & Technical Businesses

A burgeoning group of small to large creative and technical firms have chosen Chatham County for their office locations. To support and encourage this growth, organizations such as the Creative Coast were formed through collaborative private and public partnerships to leverage the area's unique blend of bright talent, leading-edge technologies, and exceptionally high quality of life—all to stimulate the growth of entrepreneurial, creative, and technical businesses in the area.

Since the development of the Creative Coast in 1997, numerous organizations and efforts have come together to better meet the needs of the creative Savannah's community. By focusing on creative entrepreneurship, technology, new media, art, music, and food culture, these groups are helping to support and shape the future of Chatham. Additionally, the Creative Coast and others continue to market and bring in high tech and knowledge-based businesses to the area as highly technical jobs have been identified as a needed resource to improve economic growth in the region.

As mentioned earlier in this element, Georgia is the top state for film production. This is due to the state's diverse site locations, ranging from natural to architectural resources. With natural areas ranging from beaches to marshland to historic houses, squares, and parks, Chatham County and Garden City has multiple filming location possibilities.

There is a collaborative between many of the local jurisdictions and the Savannah Film Office to work together on promoting film because of the large number of dollars it brings to the local region.

Military & Government

The Fort Stewart/Hunter Army Airfield (HAAF) military complex is a major sector in Chatham County's economy. Hunter Army Airfield is the sister Installation to Fort Stewart and located inside the city limits of Savannah. Its mission is to provide air transport to Fort Stewart, home of the 3rd Infantry Division, located on more than 285,000 acres in nearby Liberty County. Hunter Army Airfield's 5,400 acres centrally located in Savannah, plays a critical role in the Installation's deployment capabilities as a power projection platform with access to rail, port operations, and a major interstate road network. With the longest Army runway on the east coast, the largest military aircraft can land at Hunter, load the biggest equipment in the Army inventory, and then deploy both equipment and soldiers within an 18-hour wheels-up timeline anywhere in the world.

Just 40 miles from Garden City, Fort Stewart is located in Liberty, Bryan and portions of Evans, Long, and Tattnall Counties. Fort Stewart and HAAF together are one of Coastal Georgia's largest employers. The ratio of military to civilian employees is approximately five to one, with 20,850 officers and enlisted military and 4,153 civilians employed at both Installations. With a total 25,000 people employed, Fort Stewart and HAAF account for nearly three-fourths of the military employment in the area.

In 2015, there were 22,422 officers and enlisted military and 3,891 federal civilian employees totaling to 26,313 workers. Total payroll for both bases is estimated at well over one billion dollars and with an annual financial impact of \$4-\$5 billion dollars. While the number of employees has decreased since 2016, Fort Stewart and HAAF continue to play an important role in the regional economy pushing the demand for services such as retail, food service, real estate, and education.

Within Garden City is the Georgia Air National Guard 165th Airlift Wing, which is a military installation that has existed since the 1940s.

Aerospace

Aerospace manufacturing has been a key industry in the Savannah MSA since Gulfstream Aerospace Corporation planted roots in 1967. As the largest aerospace manufacturer in the Southeast, Gulfstream employs nearly 10,000 workers locally. In addition, more than 30 aerospace-related companies are located in the MSA, making the area a true aerospace supply cluster.

The aerospace industries enjoy the same benefits as other businesses in the area's advanced manufacturing sector, including state and local incentives, easy access to the Port of Savannah, the Savannah/Hilton Head International Airport and nationally recognized workforce training programs, among others. (Savannah Economic Development Authority). As with many of the larger economic drivers in the region, the trend for growth in the aerospace industry seems certain. Because Gulfstream is situated centrally between Garden City, Pooler, and Savannah, it has a direct economic impact on all three jurisdictions. This proximity gives the residents of Garden City access to one of the largest employers in the MSA.



Healthcare

As the population of the area ages, access to healthcare will become increasingly more crucial. This industry already composes a large portion of the economy, as it is one of the top 10 employment sectors in the area. According to the Savannah Area Chamber of Commerce, the healthcare industry generated \$1.5 billion in the Savannah MSA in 2019. The two major hospitals within this industry are Memorial Health University Medical Center (MHUMC) and St. Joseph's/Candler Health System (SJ/C). Memorial Health University Medical Center has been investing in adding and updating its facilities, and expanding health care for children, people with disabilities, and mental health services. MHUMC includes the region's only Level 1 trauma center, the region's only children's hospital and the Savannah campus of Mercer University School of Medicine. The St. Joseph's/Candler Health System is also expanding its reach. In addition to constructing a new campus just 10 miles from Garden City to serve the western Chatham region in 2019, the health system will be building a new medical campus just minutes over the bridge in Bluffton, South Carolina.

Garden City is also home to a number of healthcare facilities that serve residents, including the Good Samaritan Clinic, which opened in 2007. St. Joseph's/Candler also has the Good Samaritan Clinic in Garden City that offers healthcare to those without health insurance in the community. Recognizing that everyone deserves quality healthcare St. Joseph's/Candler partnered with Georgia Department of Community Health and Our Lady of Lourdes Catholic Church in 2009 to open a volunteer based bilingual clinic to ensure West Chatham had access to healthcare.



Tourism

Since the beginning of the preservation movement in the 1950s, the preservation of Savannah's historic and natural resources has helped to preserve the famed Oglethorpe Plan, which helps give Savannah its distinctive qualities, attracting visitors from all over the world and creating a robust tourism industry. Aesthetically pleasing architecture, culture, activities, and the beautiful natural environment bring an increasing number of visitors each year. The impact of tourism in 2019 generated \$3.1 billion in direct spending and \$27.7 million in tax revenue with most being spent on lodging, followed by food and beverage. The majority of travel to Savannah is leisure while an ever-growing amount is for business travel.

While COVID-19 temporarily affected these numbers, tourism is beginning to recover and is expected to continue growing to meet and possibly exceed the figures that the industry had seen before the pandemic's disruption.

Higher Education

Higher education institutions have a large presence in the community, with the Savannah College of Art and Design (SCAD) representing one of the top ten largest employers in the region. There are multiple other institutions in the area, such as Savannah State University, South University, Strayer University, and the Georgia Institute of Technology's local campus that all have an impact on the economy. These institutions allow for an ever-growing skilled workforce to attract a variety of businesses and industries to the Savannah MSA. Garden City's close proximity to these institutions provides the opportunity to get an education in a variety of subjects, including those that are most beneficial to the local economy.

Total Overnight Spending by Sector

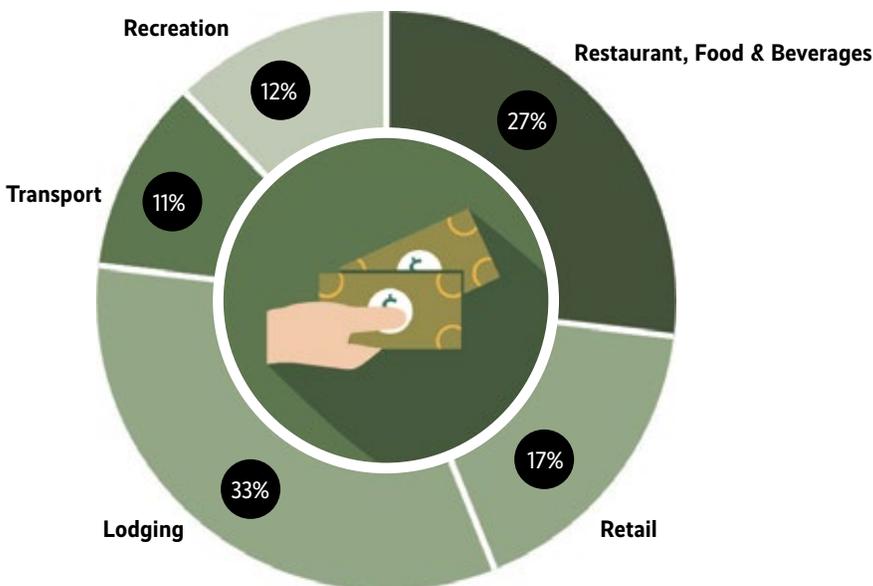


Figure 3.7—Total Overnight Spending by Sector, Savannah MSA
Savannah Area Chamber of Commerce 2019

Construction

Construction companies have a strong presence in the area, with many companies specializing in fields such as transportation construction and concrete. Construction and building supply/distribution activities have been increasing in the MSA, which is likely to have an economic impact on Garden City that could lead to more growth of an already large industry.



SAVANNAH MSA BUSINESS PROFILE

MSA Profile

The community understands that businesses, most notably small businesses, are the backbone of what keeps the US economy thriving. Throughout Chatham County there are numerous resources and organizations specifically dedicated to assisting existing and prospective businesses both small and large by providing education, networking, and growth opportunities.

The majority of businesses in the Savannah MSA employ fewer than five people, but 21% of the workforce is employed by companies with fewer than 20 employees, suggesting that the Savannah MSA small business infrastructure and programs support a strong business environment.

Based on Georgia Department of Labor data, the largest employers in the Savannah MSA are listed below (in alphabetical order). Service industry employers, such as hospitals, retail, and grocery stores, represent the bulk of these major employment centers.

- Candler Hospital Inc.
- Gulfstream Aerospace Corporation
- Gulfstream Services Corporation
- Marine Terminals Corporation-East
- Savannah College of Art and Design
- Savannah Health Services, LLC
- Sitel Operation Corporation
- St. Joseph's Hospital, Inc
- The Kroger Company
- Walmart

Of the documented 158,399 individuals working in Chatham County, 77% work for businesses and companies with 20+ employees while the remaining 23% work for companies with fewer than 20 employees

Business Employment, 2018

ESTABLISHMENT SIZE	ESTABLISHMENTS	PERCENT	EMPLOYEES	PERCENT
0-4	5,973	57.78%	8,301	5.24%
5-9	1,714	16.58%	11,319	7.15%
10-19	1,232	11.92%	16,855	10.64%
20-49	895	8.66%	26,517	16.74%
50-99	287	2.78%	19,358	12.22%
100-249	182	1.76%	27,128	17.13%
250-499	30	0.29%	10,322	6.52%
500-999	12	0.12%	8,630	5.45%
1000 and Over	12	0.12%	29,969	18.92%

Figure 3.8-Business Employment Based on Size, Savannah MSA
Georgia Department of Labor 2018

Per Capita Income

Per capita income refers to the average income earned per person in a given area over a specified year.

The average income of employees per capita income in the Savannah MSA has increased almost \$6,000 since 2015, from \$42,357 to \$48,139 in 2019

—U.S. Bureau of Economic Analysis



Average Yearly Residential Per Capita Income

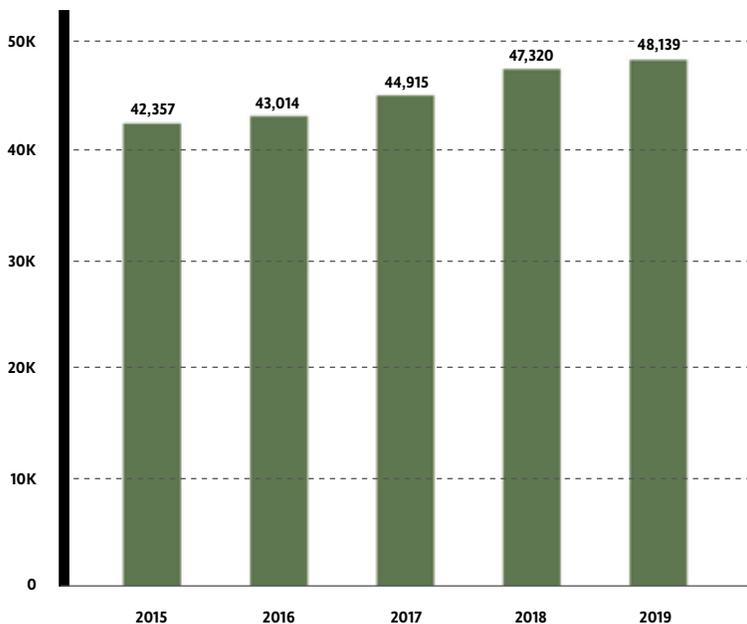
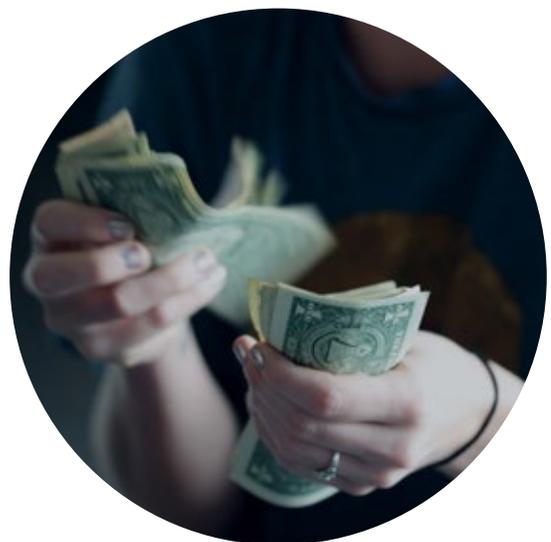


Figure 3.9—Average Yearly Income, Savannah MSA
Georgia Department of Labor 2015–2018



Wages and Employment

The overall average weekly wage in the Savannah MSA is \$921, which is a 3.1% increase from 2019 to 2020 according to the Georgia Department of Labor. The average hourly wage is \$21.92 according to the Bureau of Labor Statistics. These wages can vary by industry or job field, with some industries having a far higher average wage than others.

Household Income

According to the US Census Bureau, household income refers to the combined earnings of all individuals in a household aged 15 or older. According to the 2018 American Community Survey 5-Year Estimates, the median household income in Garden City is \$43,194 which is \$14,000 lower than the median household income for the Savannah MSA of \$57,470.

Almost 43% of Garden City's residents make \$50,000 or more a year

Income Distribution, 2018

GARDEN CITY	
Income	%
Less than \$10,000	7.7%
\$10,000 to \$14,999	5.1%
\$15,000 to \$24,999	13%
\$25,000 to \$34,999	12.7%
\$35,000 to \$49,999	18.6%
\$50,000 to \$74,999	25.8%
\$75,000 to \$99,999	6.2%
\$100,000 to \$149,999	8.1%
\$150,000 to \$199,999	1.6%
\$200,000 or more	1.2%

Figure 3.10—Income Distribution, Garden City
U.S. Census Bureau: 2018 American Community Survey 5-Year Estimate

Industry Breakdown

The majority of residents within the Savannah MSA work in the Service Industry (69.5%), followed by the Goods-Producing Industry (15.8%), and Government (14.5%). The Goods-Producing industry is defined as a field that produces a physical product, whereas the Service-Providing industry is a field in which the product is the service itself. As shown in Figure 3.12, Goods-Producing jobs have a higher average wage than both Service-Providing and Government jobs. Within the Service industry, food service has the lowest average weekly wage among all of the job fields as shown in Figure 3.13. It is important to note that these numbers are from 2020 and were impacted by COVID-19 and will likely change in the future as the pandemic subsides.

The majority of workers in Garden City work in the service industry; a larger proportion of the population, however, works in the Goods-Producing industry compared with the Savannah MSA. This could be due to the close proximity of manufacturing, port, and transportation businesses.

Employees by Industry, 2020

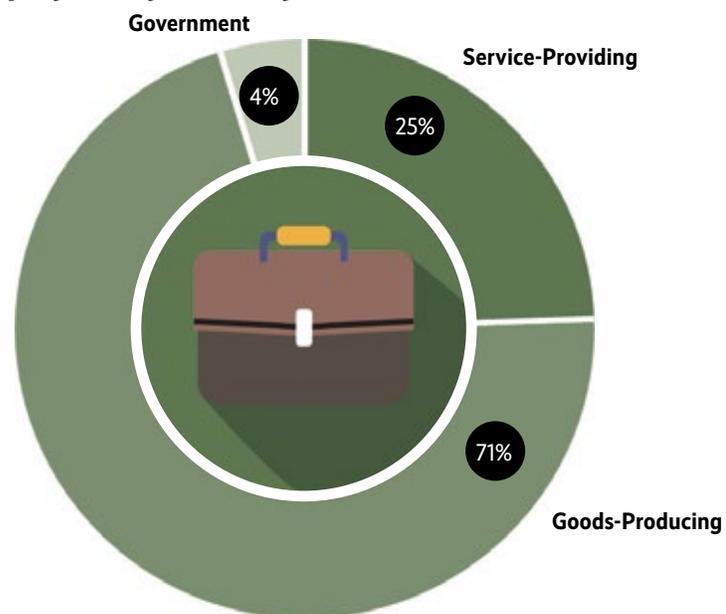


Figure 3.11—Percentage of Employees by Industry, Garden City
U.S. Census Bureau: 2018 American Community Survey 5-Year Estimate

Goods-Producing Industry

The highest wages within the Goods-Producing field are in Transportation Equipment, with a weekly wage of \$1,892. The lowest paying Goods-Producing jobs are in Printing and Related Support Activities, with a weekly wage of \$634.

The average wage within the Goods-Producing field is \$1,399

Savannah MSA Goods-Producing Wages, 2020

INDUSTRY	GOODS-PRODUCING SUB-CATEGORY	AVERAGE WEEKLY WAGE
Agriculture, Forestry, Fishing, and Hunting		\$797
Mining, Quarrying, and Oil and Gas Extraction		\$1,004
Manufacturing		\$1,569
	Beverage and Tobacco Product	\$837
	Chemical	\$1,364
	Fabricated Metal Product	\$1,244
	Food	\$1,298
	Furniture and related Product	\$878
	Machinery	\$1,063
	Misc.	\$927
	Nonmetallic	\$1,141
	Paper	\$1,419
	Petroleum and Coal Products	\$1,422
	Plastics and Rubber Products	\$869
	Printing and Related Support Activities	\$634
	Textile Mills	\$1,073
	Textile Product Mills	\$900
	Transportation Equipment	\$1,892
	Wood Product	\$960

Figure 3.12–Goods-Producing, Savannah MSA
Georgia Department of Labor, 2020

Service-Providing Industry

The highest paying jobs in the Service field are in Finance and Insurance, with a weekly wage of \$1,669, while the lowest wages are in food service and accommodations, with a weekly wage of \$346.

The average wage within the Service-Providing field is \$808, while the average weekly wage in the Government sector is \$1,025

Savannah MSA Service-Providing Wages, 2020

INDUSTRY	AVERAGE WEEKLY WAGE
Utilities	\$1,369
Wholesale Trade	\$1,227
Retail Trade	\$641
Transportation and Warehousing	\$884
Information	\$1,069
Finance and insurance	\$1,669
Real Estate and Rental and Leasing	\$863
Professional, Scientific, and Technical Services	\$1,126
Management of Companies and Enterprises	\$1,287
Administrative and Support and Waste Management and Remediation Services	\$606
Educational Services	\$1,133
Health Care and Social Assistance	\$1,006
Arts, Entertainment, and Recreation	\$552
Accommodation and Food Services	\$346
Other Services (except Public Administration)	\$757

Figure 3.13–Service-Providing Wages, Savannah MSA
Georgia Department of Labor, 2020

Savannah MSA Government Jobs Wages, 2020

	AVERAGE WEEKLY WAGE
Federal Government	\$1,466
State Government	\$1,110
Local Government	\$918

Figure 3.14–Government Wages, Savannah MSA
Georgia Department of Labor, 2020



GROWING INDUSTRIES

Which Industries are Growing?

Not only is the healthcare industry already one of the largest employment sectors in the Savannah MSA, but it is also forecasted to continue growing due to the increasing number of seniors living longer, healthier lives. Healthcare services such as ambulatory services, hospitals, and nursing homes are set to significantly increase over the next few years.

Ambulatory services providing outpatient healthcare services will experience the largest growth in the number of employees between 2016–2026 with an almost 30% increase in the number of jobs

The industry sector predicted to grow the most is the “Amusement, Gambling, and Recreation” sector, which is projected to grow by almost 35%, adding over 900 new jobs to the Savannah MSA region. “Construction of Buildings” will also experience large growth, with an increase of almost 30% or 800 new jobs being added to the region between 2016 and 2026.

Even though the almost 33,000 jobs within the Food Service category have some of the lowest weekly wages, this industry is still projected to grow over the next few years, highlighting the need to reassess the hourly wage for the sector with the most employees in the Savannah MSA.

Targeted Growth Industries

According to SEDA, there are five major industries that are likely to increase economic growth if they are invested in at the local level:

- Manufacturing/Ports/Logistics
- Tourism
- Education
- Government/Military
- Healthcare
- Retail Logistics

MANUFACTURING, PORTS, AND LOGISTICS

This industry grew 24% between 2007 to 2017. With a growing logistics industry based around expanding port operations, investing in the manufacturing, ports, and logistics industry should continue bringing higher paying jobs to the Savannah MSA.

The average yearly wage for Manufacturing, Ports, and Logistics jobs was \$55,115 in 2017
—SEDA



CREATIVE AND TECHNICAL SERVICES

While creative and technical services have decreased over the last decade, there is still opportunity to increase growth and retain the highly skilled graduates that often leave Chatham County after college. Additionally, creative, and technical jobs, such as software and video game design, often have higher wages.

By expanding partnerships between businesses and education facilities to include SCAD, GSU, and other universities, highly skilled workers can be more easily retained, and the industry will have a greater ability to expand.

TECHNOLOGY

Regional initiatives such as the Savannah Logistics Technology Corridor (SLTC) have helped to expand the tech scene. Established in 2018 to help cement Chatham County's place in the technology industry as well as encourage and grow investment, SLTC is already having a positive impact on the local industry.

The SLTC is an initiative comprised of business, government, education, and community stakeholders committed to the advancement of Georgia and the Savannah area in particular through the development of a technology corridor that supports logistics technology development through innovation and investment. The corridor was approved in 2018 by the Georgia Legislature after looking for incentives for technology growth and locations for technology corridors.

The designation creates a geographically defined area where businesses can locate and be close enough to each other to encourage collaboration and innovation. The updated 2019 corridor boundaries cover a portion of Interstates 95 and 16, the Savannah River and U.S. Highway 17 and provide opportunities for Savannah and Chatham, as well as other areas such as Bryan and Effingham counties.

The following efforts are the current focus of the SLTC:

- Expand the corridor to include the Savannah Advanced Manufacturing Center, Georgia Southern Armstrong Campus, and Savannah Tech
- Fund the development of a "Logistics Tech Academy" following the model being used in other regions (Cyber Academy and FinTech Academy)
- Fund the development and operations of an innovation center/incubator, following the model being used in other areas of the state (TechSquare in Atlanta and Cyber Center in Augusta)
- Create Cluster Grants dedicated to the corridor to enable new ideas, better education, improved cooperation between entities all dedicated to Logistics Technology
- Create a student loan repayment program, similar to that used to attract doctors, to attract experienced technologists to the Corridor
- Create a program where Corridor-based companies can sell their R&D credits or financial losses to raise capital
- Increase funding for the Angel tax credit and dedicate that increase to Corridor-based companies



ENTERTAINMENT PRODUCTION

The entertainment industry experienced a significant amount of growth between 2007 and 2017, with a 275% 10-year growth rate as cited by SEDA

The entertainment production industry has major potential to bring new opportunities to Garden City. Not only have numerous movies been filmed in the area, but there is also a potential talent base in SCAD and Savannah Tech graduates, who have majored in subjects such as film, sound design, on-set production, and visual effects.

HEALTHCARE

The healthcare industry continues to be a major source for high paying jobs in Chatham County. With Georgia Southern University, South University, Savannah Tech, Mercer School of Medicine, and others offering health programs, continuing to emphasize the health care industry’s impacts and needs in Garden City will help to attract and keep highly trained graduates in the area.

The healthcare industry grew 20% between 2007 and 2017
—SEDA



Projected Employment Growth, 2016–2026

Industry Title	2016 Base Year Employment Staff	2026 Projection Year Employment Staff	Total Change in Employees	Percent Change in Employment	Projected Annual Growth Rate (%)
Ambulatory Health Care Services	12,050	15,610	3,560	29.55%	2.62%
Educational Services	25,370	28,690	3,320	13.09%	1.24%
Administrative and Support Services	15,350	17,850	2,500	16.25%	1.52%
Food Services and Drinking Places	30,920	32,840	1,920	6.21%	0.60%
Hospitals	12,560	14,140	1,580	12.58%	1.19%
Support Activities for Transportation	5,800	7,130	1,330	23.05%	2.10%
Social Assistance	4,660	5,890	1,230	26.18%	2.35%
General Merchandise Stores	7,460	8,510	1,050	14.12%	1.33%
Professional, Scientific, and Technical Services	7,750	8,750	1,000	12.90%	1.22%
Nursing and Residential Care Facilities	4,020	4,980	960	23.94%	2.17%
Local Government, Excluding Education and Hospitals	10,940	11,890	950	8.67%	0.83%
Amusement, Gambling, and Recreation Industries	2,650	3,580	930	34.89%	3.04%
Federal Government, Excluding Post Office	10,120	11,000	880	8.77%	0.84%
Construction of Buildings	2,760	3,580	820	29.75%	2.64%
Motor Vehicle and Parts Dealers	4,370	5,140	770	17.54%	1.63%
Accommodation, including Hotels and Motels	7,890	8,630	740	9.40%	0.90%
Specialty Trade Contractors	6,260	6,970	710	11.31%	1.08%
Religious, Grantmaking, Civic, Professional, and Similar Organizations	5,660	6,320	660	11.79%	1.12%
Repair and Maintenance	3,250	3,840	590	17.99%	1.67%
Merchant Wholesalers, Durable Goods	3,840	4,400	560	14.70%	1.38%

Figure 3.15–Projected Employment Growth within the Savannah MSA by Sector

Georgia Department of Labor, 2016–2026



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DECLINING INDUSTRIES

Which Industries are Shrinking?

Paper Manufacturing is predicted to experience the highest decline in employees with an estimated 200 fewer jobs between 2016 and 2026. Publishing Industries are set to experience the biggest percentage decline in base employment, with a third of jobs expected to be lost in an ever-declining small industry.

Projected Employment Decline, 2016–2026

Industry Title	2016 Base Year Employment Staff	2026 Projection Year Employment Staff	Total Change in Employees	Percent Change in Employment	Projected Annual Growth Rate (%)
Paper Manufacturing	3,100	2,900	-200	-6.55%	-0.67%
Publishing Industries (except Internet)	450	280	-170	-37.53%	-4.60%
Postal Service	1,060	950	-110	-10.33%	-1.08%
Health and Personal Care Stores	1,980	1,890	-90	-4.94%	-0.51%
Forestry and Logging	300	240	-60	-20.46%	-2.26%
Petroleum and Coal Products Manufacturing	210	170	-40	-17.22%	-1.87%
Textile Product Mills	100	80	-20	-16.00%	-1.73%
Printing and Related Support Activities	470	460	-10	-2.75%	-0.28%
Nonmetallic Mineral Product Manufacturing	1,450	1,460	10	0.28%	0.03%
Miscellaneous Manufacturing	180	190	10	6.21%	0.60%
Miscellaneous Store Retailers	1,590	1,600	10	0.63%	0.06%
Rail Transportation	800	810	10	1.63%	0.16%
Data Processing, Hosting and Related Services	50	60	10	28.00%	2.50%
Beverage and Tobacco Product Manufacturing	120	140	20	16.26%	1.52%
Water Transportation	230	250	20	7.73%	0.75%
Broadcasting (except Internet)	410	440	30	7.26%	0.70%
Furniture and Related Product Manufacturing	180	220	40	19.78%	1.82%
Telecommunications	860	910	50	4.98%	0.49%
Scenic and Sightseeing Transportation	330	390	60	17.74%	1.65%

Figure 3.16—Projected Employment Decline within Savannah MSA by Sector

Georgia Department of Labor, 2016–2026

ECONOMIC GROWTH CHALLENGES

While Garden City has many assets with the potential to drive economic growth, there are some challenges that may prevent employers and employees alike from planting their roots in the area.

QUALITY OF LIFE IMPACTS:

- According to a survey conducted by SEDA, many residents believe that the quality of education in the area is a problem. The existence and perception of these issues can negatively impact economic growth, as employers and skilled employees may steer clear of the Savannah MSA to avoid these issues.

HOUSING AFFORDABILITY:

- A significant portion of residents in Garden City are cost burdened by housing. Far more people rent homes than own them. The lack of accessibility to home ownership can prevent possible new employees from moving to the region due to cost concerns.

WORKFORCE SKILL SHORTAGE:

- Both at the national level and more specifically via a study conducted locally by SEDA, business owners have voiced that the pool of new, younger candidates is lacking the basic “soft skills” needed for long-term success in the job force.



SOFT SKILLS

Soft skills are abilities that relate to how one works and interacts with others. Employers look for soft skills in candidates because these skills are hard to teach and are important for long-term success. Examples of Soft Skills are listed below:

- Dependability
- Effective Communication
- Open-Mindedness
- Teamwork
- Creativity
- Problem-Solving
- Critical Thinking
- Organization
- Willingness to Learn

In short, Garden City’s planning efforts have identified key initiatives that can advance the economic and physical success of Garden City in the next 20 years. The challenge becomes how best to grow denser, become more diverse, and yet maintain a sense of place that draws people to the region



SWOT ANALYSIS

The Savannah Economic Development Authority's (SEDA) SWOT Analysis below identifies some of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) associated with our local economy for the year 2020.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Logistics Infrastructure: Port of Savannah, rail, interstate - Diverse economic drivers (manufacturing, logistics, tourism, health-care, education, government, military) - Higher education - Military assets - Favorable cost of living compared to other national MSAs - Historical preservation and cultural richness - Ability to draw people back after years away - Quality of Life 	<ul style="list-style-type: none"> - Persistently high poverty rates - Underperforming K-12 schools - Crime - Inadequate skilled workforce/lack of soft skills - Capital is limited for small business community/entrepreneurs - Small number of headquarters leading to few corporate leaders active in community and economic development - Limited opportunities for young professional's career advancement - Limited public owned land available to attract high wage projects
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Retain and attract more talent - Further diversify economic base - Continue efforts to attract affluent visitors, lengthen visitor stays and increase spending - Grow entrepreneurial resources and support entrepreneurship - Invest in GSU as the regional university with the greatest potential to achieve a high level of talent - Develop infrastructure and local and regional support for the entertainment production industry - Leverage World Trade Center Savannah and other assets to increase international trade and investment - Continue to partner with SCAD to advance technology industries and entrepreneurship 	<ul style="list-style-type: none"> - Lack of coordination between governmental entities - Perception of crime and public education limits progress - Limited public transportation for workforce - Environmental threats - Status quo bias - Land assets not always developed for highest and best use from an employment perspective (i.e., high wage companies) - Shortage of teachers and principals - Trade wars and other temporary global economic challenges arise

Figure 3.17-SEDA SWOT Analysis for the Local Economy, 2020
Savannah Economic Development Authority

WORKFORCE DEVELOPMENT

The goal of workforce development programs is to provide resources that residents can tap into to aid in their professional, educational, and/or career development. These programs offer an array of resources that include educational workshops, apprenticeships, internships, networking workshops, and job shadows. Efforts should be made to continue funding and expanding the reach and capabilities of similar organizations.

STEP UP SAVANNAH: CHATHAM APPRENTICE PROGRAM (CAP)

- The goal of this program is to help unemployed and under-employed residents improve their economic health by offering sessions on business, budgeting, and networking. The program is open to all Chatham County residents 18 and older.

WORKSOURCE COASTAL

- This economic development program serves multiple coastal counties, including Bulloch, Bryan, Camden, Chatham, Effingham, Glynn, Liberty, Long, McIntosh, and Screven counties. The program has resources including training and workforce education for veterans, adult and dislocated workers, youth, and employers.

JUNIOR ACHIEVEMENT (JA) OF GEORGIA

- This teacher and volunteer driven program provide activities for K-12 students focused on career readiness, entrepreneurship, and financial literacy. JA works to empower the next generation with the knowledge, capacity, and motivation to thrive and build a better future for themselves.

YOUTH APPRENTICESHIP

- This program is designated for junior and senior high school students and aims to prepare them for the workforce by providing apprenticeships.

EMPLOYABILITY

- This organization's goal is to empower those with intellectual and developmental disabilities (IDD). Some of the services offered include job placement, career development, resume development, and ongoing job support so those with IDD can find and keep employment.

