



ECONOMIC DEVELOPMENT ELEMENT

03



ECONOMIC DEVELOPMENT

Introduction

The Economic Development Element of Pooler 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 Pooler's economy, and the city's relationship to the Savannah Metropolitan Statistical Area (MSA) 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 Pooler 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 Pooler, but also the impact of the city of Pooler on the Savannah MSA.

Because Pooler 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 Participation

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 the city of Pooler and the Savannah MSA, ranging from the size of the labor force to their level of education.

Employment

The Savannah MSA, of which Pooler is a small part, 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, the city of Pooler had a labor force of over 14,000 people, accounting for 7.45% of the entire labor force in the MSA. With a 2019 unemployment rate of 2.6% that later jumped to 5.9% in 2020 (due to COVID-19), Pooler, in general, experiences less unemployment compared with the rest of the Savannah MSA. 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.

Average Unemployment Rates

	POOLER	SAVANNAH MSA
Year	%	%
2013	7.6%	8.0%
2014	6.6%	7.1%
2015	5.5%	5.8%
2016	4.5%	5.2%
2017	3.7%	4.4%
2018	3.1%	3.7%
2019	2.7%	3.3%
2020	5.9%	7.0%

Figure 3.2—Average Unemployment Rates, Pooler & Savannah MSA
U.S. Census Bureau: 2018 American Community Survey 5-Year Estimates (Table S2301)



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 skill set 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 community 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 Pooler, over 90% of residents age 25 or older have a high school diploma (or equivalent), and 37% of residents have a bachelor's degree or higher according to the American Community Survey.

Key Points: SY 2019–20 Graduation Rate

- SCCPSS 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, SCCPSS 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?

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. The majors of local college students, as shown in Figure 3.3, reflect that variety.

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

The third most popular major is 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 and vice versa.

The presence of an internationally recognized art institution, the Savannah College of Art and Design, as well as the growing entertainment industry, could contribute to the Arts, Humanities, and Others field also having a high share of students. Additionally, Pooler has a higher percentage of people who majored in an engineering or science field compared with the Savannah MSA as a whole, which may be due to the fact that Gulfstream, a large aviation company in the area, is a major employer for Pooler residents.

First College Major for Residents 25 or Older

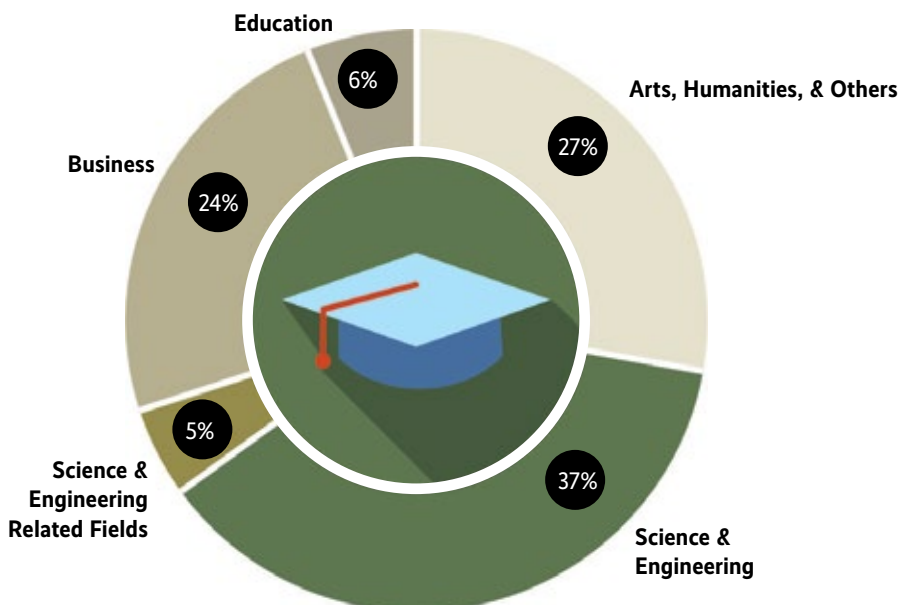


Figure 3.3—First College Major for Residents 25 or Older, Pooler
U.S. Census Bureau: 2018 American Community Survey 5-Year Estimates



Two-Year Technical College Focus Areas

A 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 attendees a more flexible and often a less expensive way to further their education compared to a four-year institution. Additionally, technical schools offer very specialized occupational schooling so students can gain specific skills that can be applied directly to the local 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, or 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 highlight for Pooler, as industries with a large presence in Pooler, such as Aviation, Trucking Transportation, Construction, are some of the highest growing degree programs.

Savannah Tech is seeing a decline in Mechanical CAD Drafters and Nursing Aides graduates. This could suggest that there are changes in these job fields influencing students to change direction and pursue specific programs over others.

One field that has seen a decline in the number of students within the technical program yet has seen growth locally and continues to benefit the overall economy is Cinematography and Film/Video Production. Not only is this field growing, it also has a large presence in the Chatham County area, as Georgia is the number one state in the U.S. in film production. Because more studios choose to film in Savannah, film production has been identified as a growing economic driver by the Savannah Economic Development Authority (SEDA).

This field has the potential to bring more capital 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 area schools of all levels with film related programs should consider promoting and expanding these programs.

Plan 2040 Survey

Forty-two percent (42%) of the respondents felt that developing 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 Pooler 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)

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)



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 for lower income residents, it demonstrates that having more education opens the door for more job opportunities. Because of this, investment in educational 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

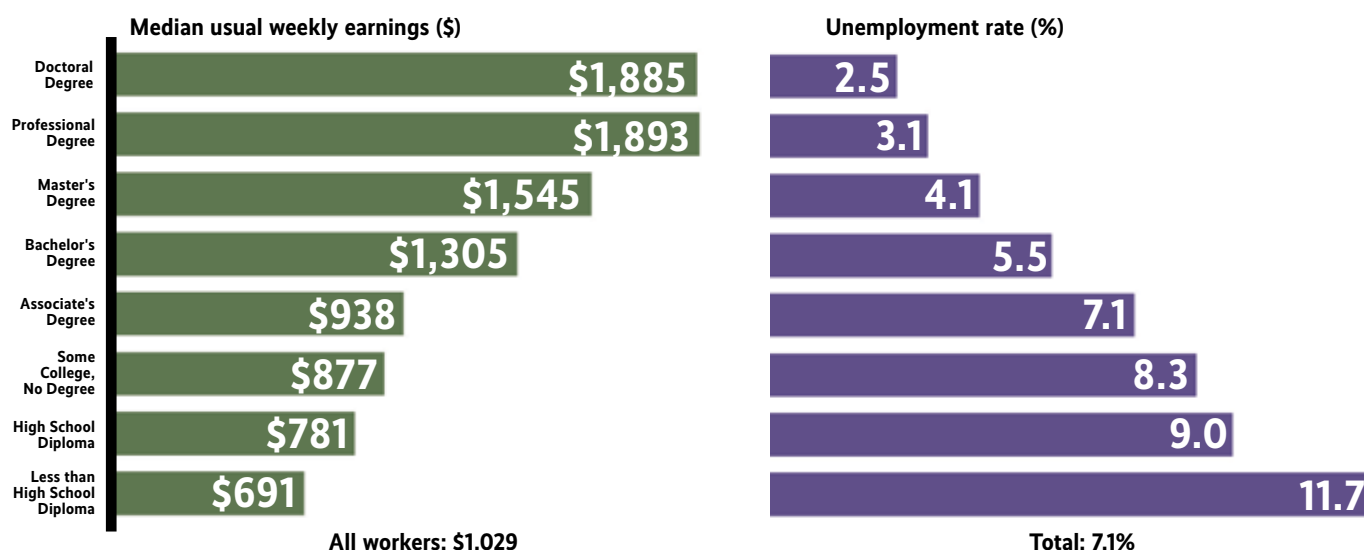


Figure 3.6—Earnings & Unemployment Rates by Educational Attainment, 2020
U.S. Bureau of Labor Statistics, Current Population Survey

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 Pooler to provide for the daily needs of local residents. Regional shopping areas that attract customers from throughout the southeast can be found in Pooler and the surrounding areas.

Major employers in the service sector include the health care industry, the tourism industry, and educational institutions. St. Joseph's/Candler and Memorial Hospitals are the most visible components of the city'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 continues to rise.

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 tourism 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 the city of Pooler, and the overall impact on the area.

Georgia Ports Authority & Logistics

Chatham County's geographic position 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 future growth will also impact port related businesses, such as logistics centers situated around the Savannah/Hilton Head Airport and Gulfstream Aerospace, both located within the city of Pooler.

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

The Savannah MSA enjoys a diverse 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

Manufacturing also has a significant presence in the city of Pooler. JCB Inc, a manufacturing company specializing in construction, agriculture, and defense equipment, is headquartered in Pooler as is Blue Force Gear, a business that produces weapons and weapon accessories.

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. 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 Pooler, Garden City, and Savannah, it has a direct economic impact on all three jurisdictions. For Pooler specifically, multiple Gulfstream facilities are located directly off Pooler Parkway, giving residents and staff direct access to one of the largest employers in the MSA.



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 business 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 Chatham County's creative 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 the area. 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.

In 2020, Governor Brian P. Kemp announced that Georgia had been ranked as the number one state for film production, and prior to the global COVID-19 pandemic, was on pace for another record-setting year. The film industry has an established and continually growing presence in Chatham County. This is due to tax credits being offered at both the state and local levels as well as the diverse site locations being offered, ranging from natural to architectural resources. With sites varying from marshland to historic houses and parks, Pooler has numerous possibilities for filming.

Military & Government

The Fort Stewart/Hunter Army Airfield military complex is a major sector in the Savannah MSA's economy. Hunter Army Airfield (HAAF) is the sister Installation to Fort Stewart and is located within the Savannah city limits. Its mission is to provide air transport to Fort Stewart, home of the 3rd Infantry Division, located on more than 285,000 acres nearby. HAAF'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 deploy both equipment and soldiers within an 18-hour wheels-up timeline anywhere in the world.

Just 35 miles from Pooler, 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 of 25,000 employees, Fort Stewart and HAAF account for nearly three-quarters of military employment in the area. Total payroll for both bases is estimated at well over \$1 billion dollars and with an annual financial impact of \$4–\$5 billion dollars.

The direct spending from military operations, staff, and residents helps to sustain local communities by creating employment opportunities across a wide range of sectors, both directly and indirectly. Active duty and civilian employees spend their military wages on services such as retail, food service, real estate, and education. The Savannah MSA also benefits from defense contracts with private companies for equipment, supplies, construction, and various services such as health care and information technology.

Higher Education

Higher education institutions have a large presence in the community, with the Savannah College of Art and Design (SCAD) being 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 Pooler 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 institutions to the Savannah MSA and Pooler area.

As more individuals are drawn to the area for both education purposes and to tap into a diverse, higher skilled workforce that graduates nearly 10,000 students a year, a large majority of graduates currently leave the area after graduation. Efforts to retain these graduates and ensure their placement in the Savannah MSA should be expanded.



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 just minutes over the bridge in Bluffton, South Carolina where the health system is scheduled to build a new medical campus. Additionally, a new campus was constructed in 2019 in Pooler to serve the western Chatham region. This new facility includes primary care, specialty care, outpatient surgery, advanced imaging services, physical therapy services and more. Within this system is also new forms of health care, such as the robotic DaVinci Surgical System, offering residents an advanced level of care, with more planned in the future as the hospital expands. With the continued growth in the area, St. Joseph's/Candler Health System already has plans for expansion in the vicinity of the new Pooler campus. As the population grows and more residents move to Pooler, the demand for both routine and critical healthcare services will surely increase.



Tourism

Since the beginning of the preservation movement in the 1950s, the preservation of Savannah's historic resources has helped to preserve the famed Oglethorpe Plan, which helps give Savannah its distinctive qualities that attract visitors from all over the country, creating a robust tourism industry.

Aesthetically pleasing architecture, culture, activities, and the beautiful natural environment brings 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 the Chatham County region is leisure while an ever-growing amount is for business travel.

According to Visit Savannah, a major economic driver in the tourism industry is the Savannah Convention Center, hosting more than 160 events and 200,000 tourists annually. The economic impact the convention center has on the Savannah MSA and state economics is immense, providing \$1.4 billion in economic impact over that past twenty years, \$13.5 million raised in state and local government tax revenues annually, and supporting 28,000 tourism and hospitality jobs. As the convention center grows, the economic effects will spill over to Pooler and other surrounding jurisdictions, fueling their local economy.

According to the Pooler Chamber of Commerce and Visitors Bureau, there are currently 17 hotels located in the city. These hotels help support the overall tourism industry by offering local visitors more options for lodging. For example, tourists lodging in Pooler have the option to visit destinations like the Tanger Outlet Mall and Savannah's River Street located within minutes of Pooler. Figure 3.8 shows the net taxable charges for lodging accommodations per year and mean of approximately \$22.5 million per year

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.

Total Overnight Spending by Sector

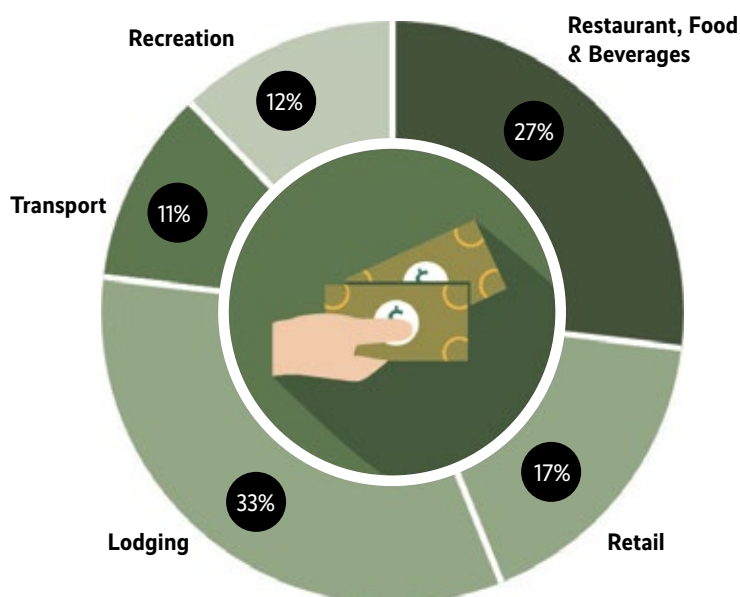


Figure 3.7–Total Overnight Spending by Sector, Savannah MSA
Savannah Area Chamber of Commerce 2019

Retail

Retail is a major industry in the Pooler area, especially given one of the main attractions is the regionally prominent Tanger Outlet Mall. The mall is home to over 100 businesses, ranging from clothing, to food, and furniture. Not only does this mall offer employment and business opportunities, but it also acts as an anchor for the multitude of other businesses along Pooler Parkway.

Net Taxable Charges for Lodging 2016–2020

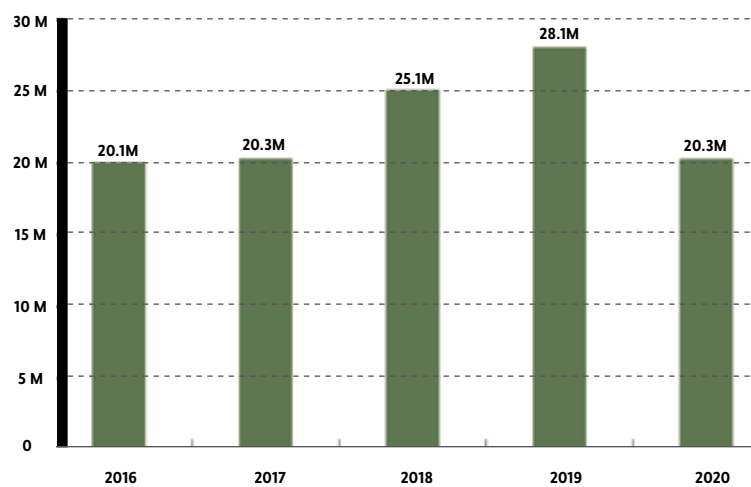


Figure 3.8–Net Taxable Charges for Lodging, Pooler
Savannah Area Chamber of Commerce 2019



SAVANNAH MSA BUSINESS PROFILE

MSA Profile

The community understands that businesses, most notably small businesses, are the backbone of what keeps the U.S. 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. This suggests that the small business infrastructure and programs in the MSA 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, 2020

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 3.9–Business Employment Based on Size
Georgia Department of Labor 2020

Per Capita Income

Per capita income refers to the average amount of money 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

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Average Yearly Residential Per Capita Income

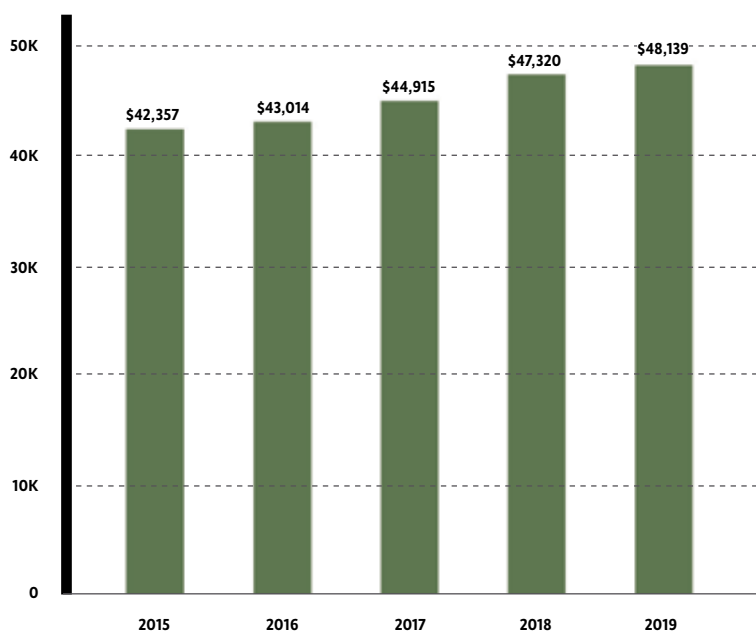
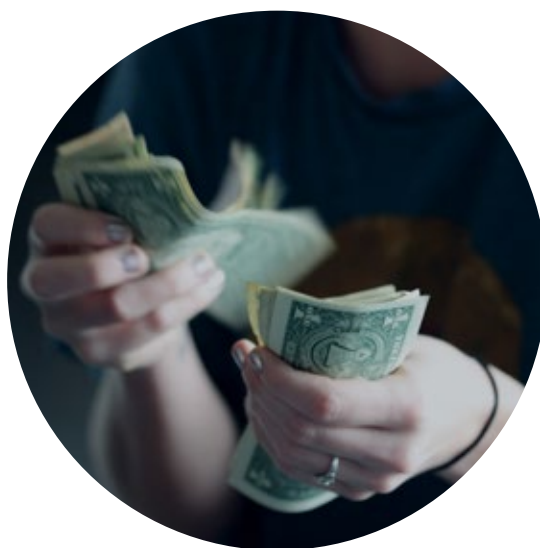


Figure 3.10—Average Yearly Income, Savannah MSA
Georgia Department of Labor 2015–2019



Wages and Employment

The overall average weekly wage in the Savannah MSA is \$921, which is a 3.1% increase between 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 U.S. Census Bureau, household income refers to the combined earnings of all individuals in a household aged 15 or older. According to the American Community Survey, the median household income in Pooler is \$78,102, which is around \$21,000 higher than the median household income for the Savannah MSA of \$57,470. As shown by the chart below, a majority of households in Pooler earn \$100,000 to \$149,999.

Income Distribution, 2018

POOLER	
Income	%
Less than \$10,000	0.9%
\$10,000 to \$14,999	2.7%
\$15,000 to \$24,999	7.1%
\$25,000 to \$34,999	5.6%
\$35,000 to \$49,999	13.7%
\$50,000 to \$74,999	17.6%
\$75,000 to \$99,999	12.8%
\$100,000 to \$149,999	20.7%
\$150,000 to \$199,999	12%
\$200,000 or more	6.9%

Figure 3.11—Income Distribution, Pooler

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-Providing 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 on the facing page, Goods-Producing jobs have a higher average wage than both Service-Providing and government jobs. Within the Service-Providing industry, food service has the lowest average weekly wage among all of the job fields listed. It is important to note that these numbers are from 2020 and were impacted by COVID-19.

In Pooler, the majority of workers are employed in the Service-Providing industry (60.2%), followed by Goods-Producing (32.1%) and government (7.7%). A larger proportion of Pooler's population works in the Goods-Producing industry compared with the Savannah MSA as a whole—this could be due to the city's proximity to many manufacturing, construction, and transportation businesses.

Employees by Industry, 2020

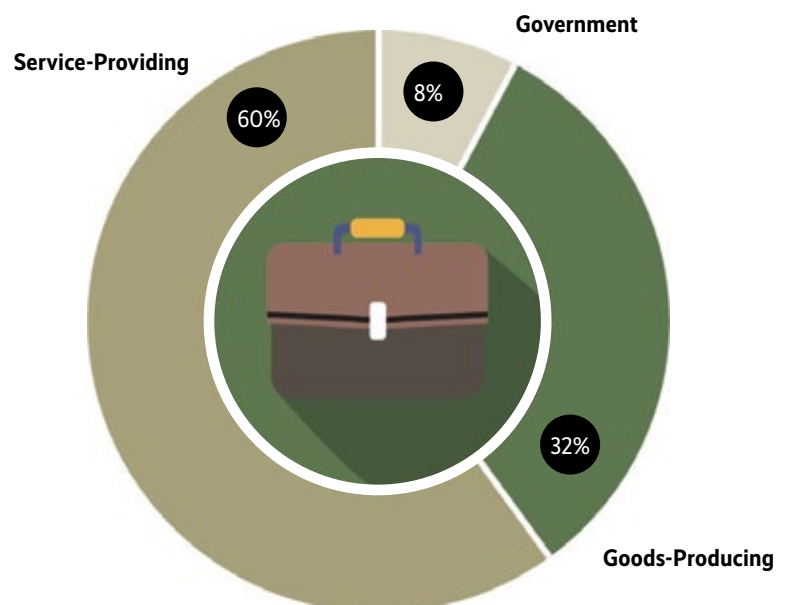


Figure 3.12—Percentage of Employees by Industry, Pooler

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

Service-Providing Industry

The highest paying jobs in the Service-Providing 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 3.14–Service-Providing Wages, Savannah MSA
Georgia Department of Labor, 2020

Savannah MSA Government Wages, 2020

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

Figure 3.15–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 MSA, but it is also forecast 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 by percentage 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 expected to be added to the region between 2016 and 2026.

Pooler is also expected to see growth in recreation and retail, with a new indoor skydiving business that began construction in 2020 and the highly anticipated Costco that was announced in 2021.

Even though the almost 33,000 jobs within the "Food Service" category have some of the lowest weekly wages, this industry is 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. With major growth in the volume of "Food Services and Drinking Places," "General Merchandise Stores," and "Support Activities for Transportation" industries, Pooler will continue to see strong impacts on the city's economy viability.

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 are more likely to be 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 technology sector. 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 grew significantly 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 Chatham County. 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 of 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 Chatham County 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 3.16–Projected Employment Growth within the Savannah MSA by Sector

Georgia Department of Labor, 2016–2026

RETAIL LOGISTICS

Amazon has announced a new fulfillment center, dubbed the “Pooler Megasite,” to be built at a central point between unincorporated Chatham, the city of Savannah, the city of Pooler, and Garden City. The project is expected to be complete in the second half of 2022, and is predicted to add 1,000 jobs to the economy. This fulfillment center is a part of a larger trend of the growing foothold of the logistics industry in the area. The facilities’ location creates the opportunity for multiple jurisdictions to participate and work in this job system.



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 3.17–Projected Employment Decline within Savannah MSA by Sector

Georgia Department of Labor, 2016–2026

ECONOMIC GROWTH CHALLENGES

While the Savannah MSA 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. Respondents also believed that crime was a major deterrent in the city of Savannah. 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 Savannah 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 are 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

Chatham County’s planning efforts have identified key initiatives that can advance the economic and physical success of the Savannah region in the next 20 years. The challenge becomes how best to increase density, become more diverse, and yet maintain a sense of place that draws people to the region.



SWOT ANALYSIS

SEDA's SWOT Analysis below identifies some of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) associated with the local economy for 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 – Under performing 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 – Increase air service and lower costs – Invest in GSU as the regional university with the greatest potential to achieve a high level of talent – Develop infrastructure and ecosystem as well as 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 – Companies unable to scale in Savannah – 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 3.18–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 Chatham County residents 18 and older.

SAVANNAH IMPACT PROGRAM (SIP)

- This program is designed for at-risk youth and high-risk offenders to prevent the possibility of re-offending. SIP provides supervision, job readiness skills, and mental health resources, so youth who have previously committed a crime can re-enter society.

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.



AUTOMATION, LOGISTICS, & ENTREPRENEURSHIP

Automation is expected to change the employment landscape. As machines become more able to perform tasks typically done by humans, there will be a major shift in the job market. An example of automation that has increased are self-checkouts in stores and self-ordering kiosks in fast food restaurants. These technologies reduce the need for cashier positions. While this may be more visible in service positions, there is also increasing automation in manufacturing and transportation industries. With the rise of self-driving cars, AI technology, self-service technology, and businesses operated entirely online, the economy as we understand it may change completely over the next few decades. This brings the possibilities of less jobs as automated machines increasingly can do them more efficiently than humans. The plan for economic development must also consider a future with fewer jobs or new innovative roles.



Entrepreneurship has always been an important factor in the overall economy. With the rise of the internet, there are a variety of new ways that individuals can pursue self-employment and small business startups. The majority of businesses in the Savannah MSA are small, so it is necessary to be able to support this sector of the economy while also helping people wanting to start businesses enter the field.

The economy is changing, with many people being unable to afford to live off of one job. Because of this, there has been an increase in the gig economy, which is defined as temporary, short term, or small task jobs that are more flexible than getting a second job. People also can have gig jobs as their main source of income because of their flexibility. Gig jobs include driving for Uber and Lyft, and food delivery services like GrubHub and Instacart. Streamlining the entrepreneurship process can make this form of labor participation more accessible to local residents, and provide more economic opportunities.

Plan 2040 Survey

Fifty-three percent (53%) of respondents felt that supporting local entrepreneurship, especially small business and home business was very important.

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



THE IMPACT OF GEOGRAPHIC MOBILITY

Geographic mobility refers to people moving into or within a municipality. According to the 2014–2018 American Community Survey, 8% of Pooler's population moved into the city from within Chatham County, 3% relocated from another county within Georgia, 7% relocated from another state, and 1% relocated from abroad. These moves can be an indicator of the economic situation within an area. While there has been major economic growth in the Savannah MSA, the persistent poverty rate and low economic mobility suggests that this job growth is more beneficial to new residents of the Savannah MSA than existing residents. Economic growth in and of itself, therefore, is not necessarily beneficial to the local population if residents are not able to benefit from that growth through job access. People living within the Savannah MSA should have access to the same economic opportunities that newcomers receive.

Plan 2040 Survey

According to the Plan 2040 survey, investment into local businesses and residents is important to the majority of respondents. For example, over 78% of respondents felt it was important or very important to develop a skilled workforce through training programs, recruitment, and continuing education

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



ECONOMIC RESILIENCE

The impact of COVID-19 on communities throughout the country has increased discussions on how to make the economy more resilient.

Employment in the city of Pooler declined 18% during the COVID-19 pandemic

The number of passengers flying out of the Savannah Hilton Head International Airport declined significantly, which greatly impacted the aviation industry. Despite the economic disruptions caused by the pandemic, Pooler is forecast to bounce back, with the unemployment rate expected to decrease and employment expected to grow by 4-6% (i.e., 600 new jobs added to the economy). Job industries in Logistics/Port Activity, Real Estate Development, Residential Construction, Retail, and Leisure and Hospitality are also expected to improve in 2021 as the pandemic subsides.

As the economy recovers, it is important to consider the specific impacts caused by the COVID-19 pandemic and strategies necessary to improve economic resilience in the future



ECONOMIC RESILIENCE

Economic resilience refers to the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock all together.

—U.S. Economic Development Administration (EDA)



TRENDS

- The COVID-19 pandemic accelerated the practice of remote working for most organizations. Businesses have invested in employee and customer safety, restaurants and retail have pivoted to providing outdoor services and options for online commerce, and the pandemic may have accelerated the adoption of virtual healthcare.
- The following section identifies some points that should be evaluated and implemented to ensure the community is planning for and implementing economic resilience through the integration of specific goals and actions to bolster the long-term economic durability of the Chatham County region.

EQUITY

- Multiple racial and ethnic groups were disproportionately impacted by unemployment in 2020. According to the Bureau of Labor Statistics, the seasonally adjusted unemployment rate for Black or African Americans jumped from 6% to 16.7% between February and May 2020 before dropping to 9.9% in December. By contrast, seasonal unemployment for white individuals grew from 3.0% to 12.3% in the same period and dropped to 6.0% by December 2020.
- It is estimated that COVID-19 will have disproportionately impacted Black, Indigenous, and People of Color (BIPOC)-owned small businesses. A recent report from the Service Corps of Retired Executives (SCORE) notes that BIPOC business owners were more likely to apply for forms of financial assistance than white business owners, but less likely to receive it. BIPOC business owners were also more likely to report negative business impacts as a result of remote work measures compared with white-owned businesses. A report from the Federal Reserve Banks shows that BIPOC-owned businesses were nearly twice as likely to be classified as “at risk” or “distressed” in 2019, pointing to structural barriers that influence issues such as financial health and whether a business is able to accumulate significant cash reserves.

According to the Bureau of Labor Statistics, the seasonally adjusted unemployment rate for Black or African Americans jumped from 6% to 16.7% between February and May 2020 before dropping to 9.9% in December

—Bureau of Labor Statistics

