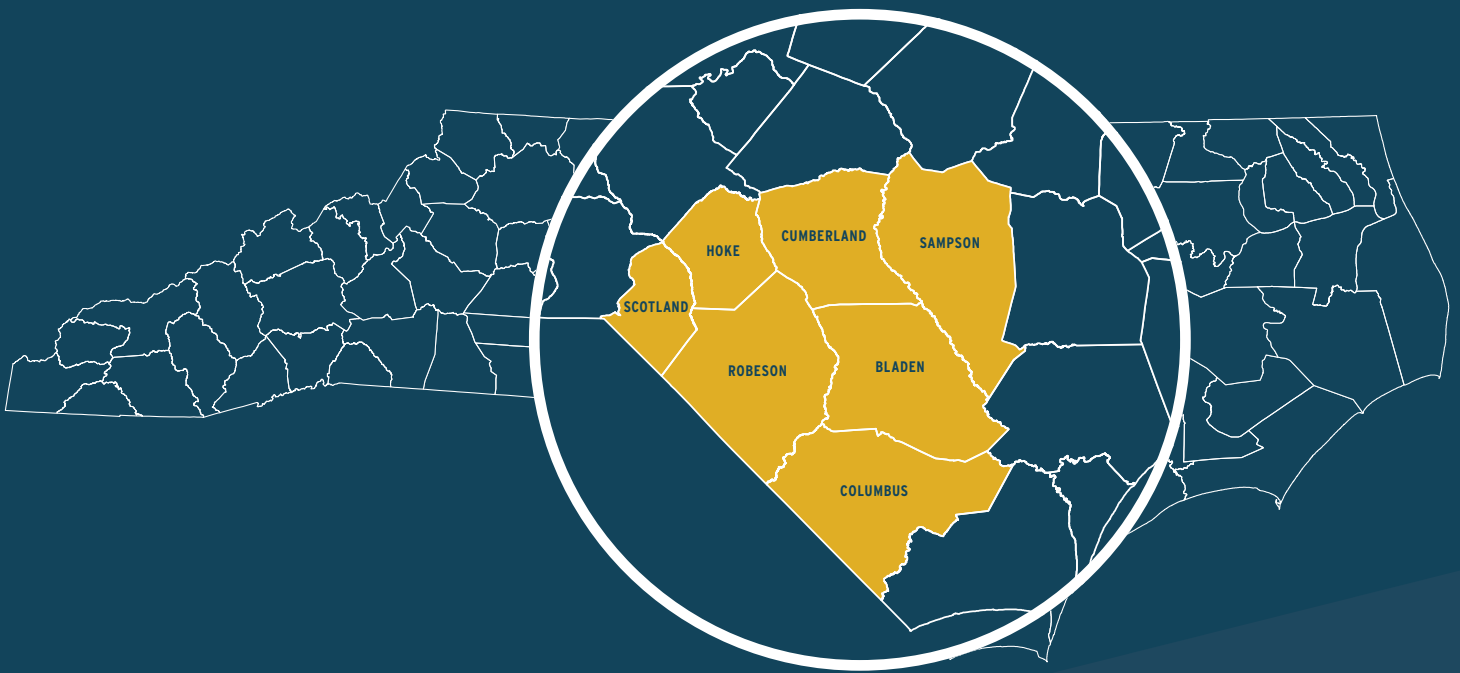


North Carolina Community College System

2025 Fayetteville-Lumberton Region Labor Market Analysis Report

APRIL 2025



Fayetteville-Lumberton Region Counties

Bladen • Columbus • Cumberland • Hoke • Robeson • Sampson • Scotland

NC Community Colleges serving the Fayetteville-Lumberton Region

Bladen CC • Fayetteville TCC • Richmond CC • Robeson CC • Sampson CC • Sandhills CC • Southeastern CC



NC DEPARTMENT
of COMMERCE
LABOR & ECONOMIC
ANALYSIS



ECONOMIC DEVELOPMENT PARTNERSHIP of
NORTH CAROLINA

NC COMMUNITY
COLLEGES
CREATING SUCCESS

Introduction

This report is designed to help stakeholders understand the current and future labor market within their region. It is also a tool for North Carolina community colleges as they consider programmatic changes that align with the labor market and identify potential opportunities for programmatic collaboration with other colleges in the region. This report specifically provides regional insights into:

- Recent trends associated with overall employment at the region and county levels
- Current regional diversity of industry sectors and occupational groups
- Projected regional changes across industry sectors and occupational groups
- Regional projections for annual openings in occupations requiring or preferring a community college education and their associated earnings
- Annual count of regional community college completers by program and their associated earnings
- Comparison of occupational openings and community college completers by PropelNC Workforce Sector
- Recent economic development activity

Region

North Carolina's 100 counties are organized into eight multi-county economic regions called Prosperity Zones, which are further divided into sixteen Sub Prosperity Zones. The Fayetteville-Lumberton region is one of two subzones of the Sandhills region, encompassing the following counties: Bladen, Columbus, Cumberland, Hoke, Robeson, Sampson, and Scotland.



Highlights

Employment (Pages 4-5)

- The region grew employment by 0.9% between 2018-2023, resulting in 227,204 workers in 2023.
- 3 of 7 counties in the region saw growth in employment across the 6-year period.
- The regional unemployment rate was 4.6% in 2023, above the statewide rate (3.5%).
- All counties showed a net decrease in unemployment rates across the 6-year period. In 2023, unemployment rates ranged from 3.5%-6.3%.

Existing Industry Sectors and Occupational Groups (Pages 6-7)

- In 2022, the four largest industry sectors in the region were Health Care and Social Assistance, Government, Manufacturing, and Retail Trade.
- In 2022, the four largest occupational groups in the region were Office and Administrative Support, Transportation and Material Moving, Sales and Related, and Food Preparation and Serving Related.

Labor Supply and Demand (Page 8)

- During the COVID-19 pandemic, there was an oversupply of job seekers relative to job openings. In every year since (through 2023), job openings have outpaced labor.
- In 2023, Architecture and Engineering Occupations and Healthcare Support Occupations had significantly more jobs than job seekers (ratio: 0.2), whereas Life, Physical, and Social Science Occupations had about twice as many job seekers as available jobs (ratio: 2.3).

Employment Projections (Pages 9-10)

- The region is projected to add over 10,000 jobs between 2022 and 2032. The Accommodation and Food Services sector will experience the largest growth (+3,220 jobs) and the largest percentage growth (14.2%).
- Across the 10-year period, the Food Preparation and Serving Related Occupations group will experience the largest growth (+2,704 jobs), and the Computer and Mathematical Occupations group will have the largest percentage growth (14.4%).

Focused Occupational Projections and Current Earnings (Pages 11-12)

- Between 2022 and 2032, it is projected that Home Health and Personal Care Aides and Nursing Assistants will be the two occupations with the highest number of annual openings in the region.
- Within the region, median annual earnings among the top twenty-five occupations range from \$25,223 (Teaching Assistants, Except Postsecondary) to \$92,466 (Business Operations Specialists).

Community College Completers and Earnings (Page 13)

- In the 2023-2024 academic year, the Business Administration and Management and Nursing Assistant/Aide and Patient Care Assistant/Aide pathways produced the most completers (586 and 459, respectively).
- The Registered Nursing/Registered Nurse completers had the highest average median salary (\$85,072).

PropelNC Workforce Sector Occupation Projections and Community College Completers

(Page 14)

- Using projections for 2032, the PropelNC-aligned workforce sectors with the largest number of openings in the region were Trades and Transportation (33.3%) and Business and Management (19.1%).
- In comparison, based on completions in the 2023-2024 academic year, the PropelNC-aligned workforce sectors with the largest number of completers included Trades and Transportation (20.4%) and Public Safety and First Responders (17.5%).

Economic Development Projects (Page 15-16)

- Between 2019 and 2024, 60 economic development projects were reported across the region, adding a total of 4,806 jobs and \$2.0 billion in capital investment.
- Across the six-year period, the Food, Beverage and Agriculture sector saw the largest growth in jobs (1,253 new positions) and the greatest investment (\$346 million).
- The announced projects included 7 foreign direct investments from 6 different countries, including the United Kingdom (2 projects), Italy (1 project), and Canada (1 project).

Appendix (Page 17-22)

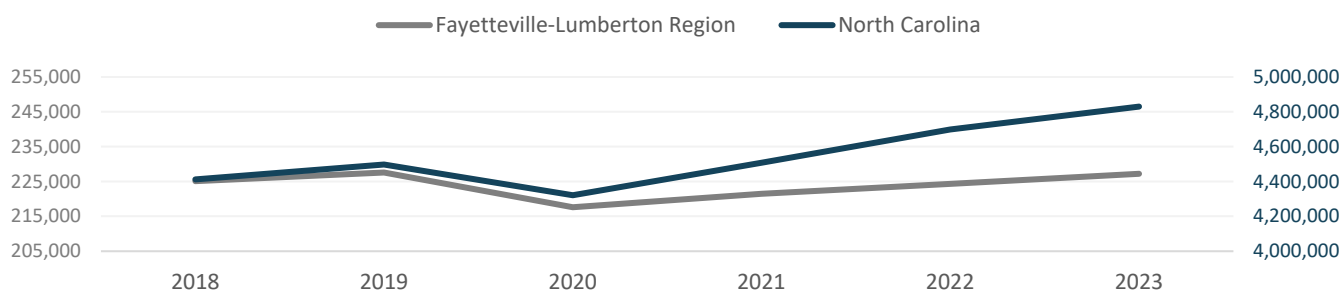
- Technical Documentation
- Detailed Data Tables
- Acknowledgements

Employment

Employment Trends

Data from the Quarterly Census of Employment and Wages shows that the Fayetteville-Lumberton region had 227,204 workers in 2023, which represents 0.9% growth in employment since 2018 (225,070 workers). After reducing the workforce by nearly 10,000 jobs during the COVID-19 pandemic, the region has steadily recovered and, as recently as 2023, has reached pre-pandemic levels of employment (net gain of around 2,000 workers). Compared to state trends, the Fayetteville-Lumberton region lost a higher percentage of workers during the pandemic (-3.9% statewide compared to -4.4% regionally) and recovered at a slower rate (4.2% growth statewide in 2021-2022 compared to 1.3% regionally). Figure 1 compares statewide and regional employment from 2018 to 2023.

Figure 1. Statewide and regional employment statistics from 2018-2023.



Employment by County

Counties in the Fayetteville-Lumberton region show different trends in employment across 2018-2023. Four of the seven counties experienced a net decrease in their workforce during the 6-year period, including Columbus, Robeson, Sampson, and Scotland. Moreover, while employment in Scotland grew following the pandemic, employment in Robeson and Sampson counties showed declines in 2020-2021 and only marginal improvements the following year (2021-2022). Sampson County experienced a loss of workers again between 2022-2023, leading to a net loss of 7.1% across the 6-year period. The three counties that experienced net gains in employment include Bladen, Cumberland, and Hoke. While Hoke County has the smallest workforce in the region, it showed the strongest gains (a 6.7% net increase across the 6-year period). Cumberland County, which accounts for over half of the workforce in the region, drove the regional trend of a 0.9% change. Employment in this county increased from 119,643 workers in 2018 to 122,493 workers in 2023, a net gain of 2,850 (2.4%). Table 1 provides a breakdown of statewide, regional, and county-level employment across the period.

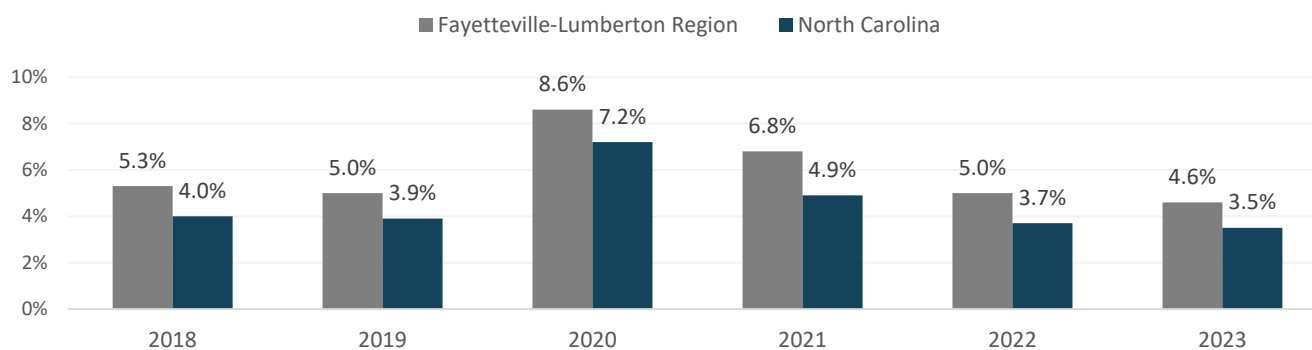
Table 1. Statewide, regional, and county-level employment statistics from 2018-2023.

	2018	2019	2020	2021	2022	2023	Net Change
North Carolina	4,411,261	4,497,459	4,321,018	4,506,954	4,698,369	4,830,066	9.5%
Fayetteville-Lumberton	225,070	227,561	217,599	221,463	224,295	227,204	0.9%
Bladen	13,123	13,231	13,074	13,296	13,397	13,718	4.5%
Columbus	15,035	15,304	14,937	15,294	15,130	14,991	-0.3%
Cumberland	119,643	120,525	114,764	118,307	120,216	122,493	2.4%
Hoke	8,441	8,705	8,417	8,482	8,724	9,003	6.7%
Robeson	38,585	39,404	37,944	37,391	37,575	38,103	-1.2%
Sampson	18,452	18,388	17,389	17,302	17,571	17,134	-7.1%
Scotland	11,791	12,004	11,074	11,391	11,682	11,762	-0.2%

Unemployment Rate Trends

Unemployment data, obtained from the Local Area Unemployment Statistics, suggests that the rate of unemployment in the Fayetteville-Lumberton region hovered around 5.1% in 2018 and 2019, above statewide averages. Unsurprisingly, unemployment rates hit a record high across the 6-year period in 2020, reaching 8.6%. Since then, unemployment rates have declined rapidly, reaching pre-pandemic levels by 2022 (5.0%) and resulting in a net change in unemployment rate of -0.7% between 2018 and 2023. Compared to statewide trends, the Fayetteville-Lumberton region saw greater unemployment during the COVID-19 pandemic, and as of 2023 has significantly higher unemployment rates (4.6% versus 3.5% statewide). Figure 2 compares statewide and regional unemployment rates from 2018 to 2023.

Figure 2. Statewide and regional unemployment statistics from 2018-2023.



Unemployment Rate by County

Across the Fayetteville-Lumberton region, county-level variation in unemployment rates ranges from 3.5% in Sampson County to 6.3% in Scotland County in 2023. Based on six years of data from 2018-2023, Columbus and Sampson tend to have slightly lower unemployment rates than the regional average, Robeson and Scotland tend to have slightly higher unemployment rates than the regional average, and Bladen, Cumberland, and Hoke tend to be very similar to the regional average. This is unsurprising for Cumberland County, given that, based on the volume of jobs, it drives the unemployment rates for the region. Scotland County's rates of unemployment tend to fluctuate more than the other counties in the region. For example, unemployment rates increased by 5.4% during the pandemic (the second highest county was Cumberland, which increased by 4.2%), and decreased by 3.0% and 0.9% in 2021 and 2022, respectively. Scotland County is tied with Bladen for the largest net change in unemployment (-1.1%), and Columbus County is close behind with a net change of -1.0% across the six-year period. Table 2 displays statewide, regional, and county-level unemployment rates from 2018-2023.

Table 2. Statewide, regional, and county-level unemployment statistics from 2018-2023.

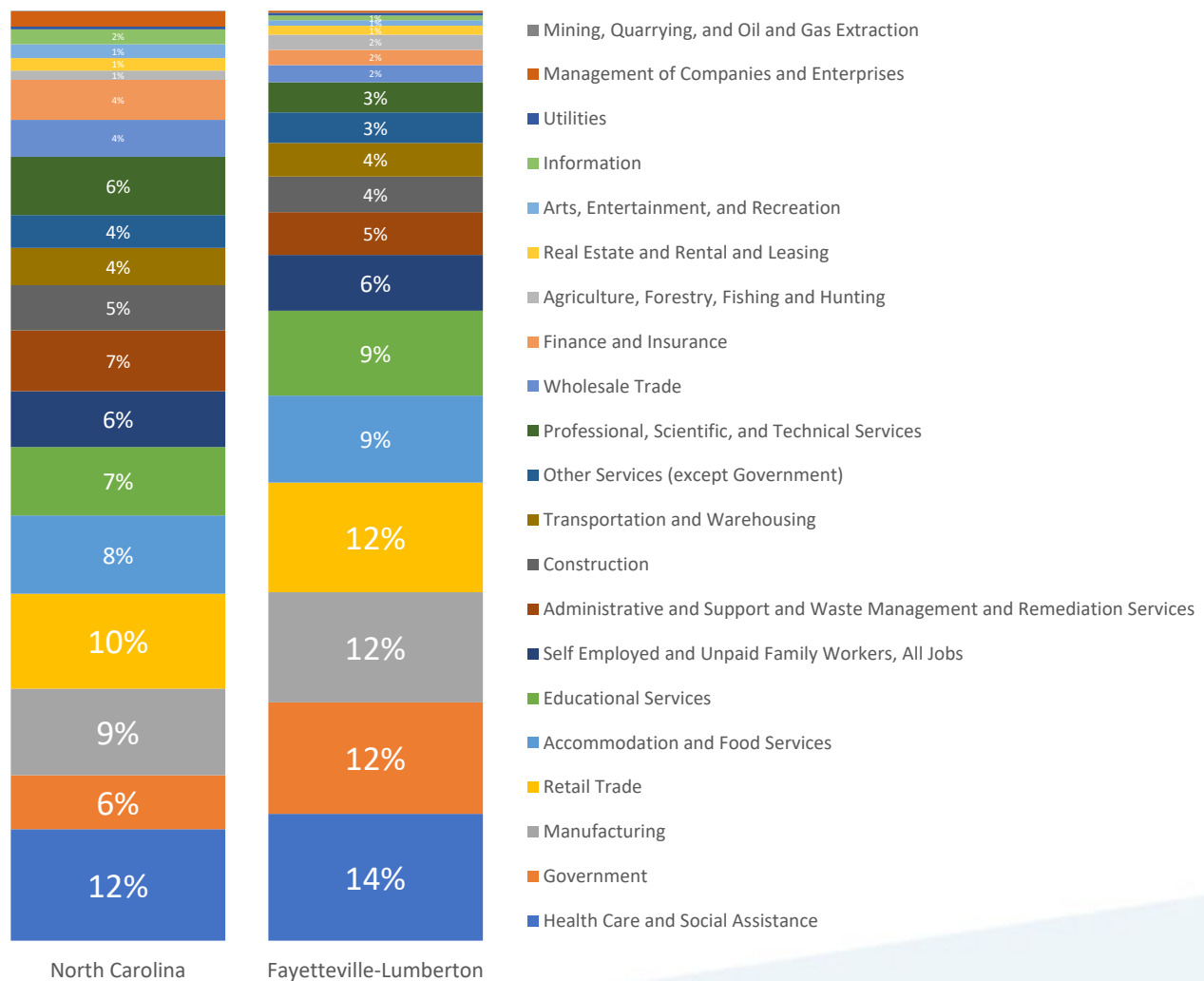
	2018	2019	2020	2021	2022	2023
North Carolina	4.0%	3.9%	7.2%	4.9%	3.7%	3.5%
Fayetteville-Lumberton	5.3%	5.0%	8.6%	6.8%	5.0%	4.6%
Bladen	5.3%	4.7%	7.2%	5.9%	4.4%	4.2%
Columbus	5.0%	4.9%	8.0%	6.3%	4.3%	4.0%
Cumberland	5.2%	5.1%	9.3%	6.9%	5.2%	4.7%
Hoke	5.1%	4.9%	8.4%	6.5%	5.0%	4.4%
Robeson	5.9%	5.3%	8.7%	7.6%	5.6%	5.0%
Sampson	4.1%	3.8%	5.8%	4.6%	3.8%	3.5%
Scotland	7.4%	6.5%	11.9%	9.5%	6.5%	6.3%

Existing Industry Sectors and Occupational Groups

Industry Sectors

In 2022, four industries – Health Care and Social Assistance, Government, Manufacturing, and Retail Trade – each accounted for over 10% of jobs in the Fayetteville-Lumberton region (a combined 119,587 out of 242,788 jobs in the area). An additional three industry sectors each boasted between 6-9% of the total job count, including Self Employed and Unpaid Family Workers (14,565 jobs), Educational Services (22,179 jobs), and Accommodation and Food Services (22,703 jobs). Collectively, these seven industries account for 74% of positions in the Fayetteville-Lumberton region in 2022. In contrast, six sectors – Mining, Quarrying, and Oil and Gas Extraction; Management of Companies and Enterprises; Utilities; Information; Arts, Entertainment, and Recreation; and Real Estate and Rental and Leasing – had less than 2,500 jobs and accounted for 1.0% or less of the total job market. Other sectors – for example, Finance and Insurance and Construction – accounted for between 2.0% (roughly 4,000 jobs) and 5.0% (around 11,200 jobs) of the market. Figure 3 shows the statewide and regional distribution of the workforce in each industry sector.

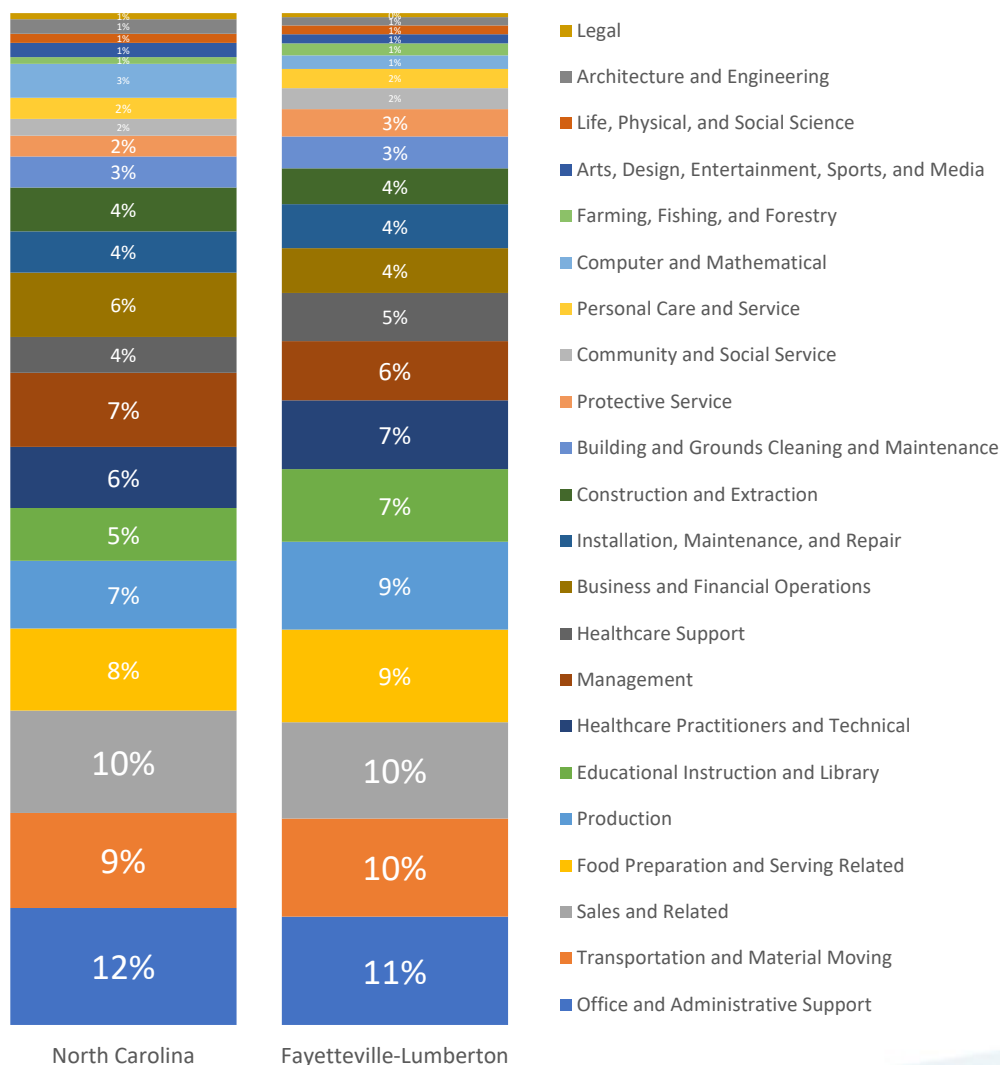
Figure 3. Statewide and regional distribution of industry sectors in 2022.



Occupational Groups

The occupational landscape consists of twenty-two occupational groups, the smallest of which (Legal Occupations) was estimated to contain 955 positions in 2022, and the largest of which (Office and Administrative Support Occupations) was estimated to have 25,984 positions in 2022 in the Fayetteville-Lumberton region, representing between 0.4% and 10.7% of the total workforce in this area. Other smaller occupational groups include Architecture and Engineering Occupations (1,998 jobs), and Life, Physical, and Social Science Occupations (2,120 jobs), and Arts, Design, Entertainment, Sports, and Media Occupations (2,179 jobs). In total, eleven occupational groups have less than 10,000 jobs, each representing less than 4.0% of the total workforce. In contrast, in addition to Office and Administrative Support Occupations, four occupational groups had more than 20,000 positions in Fayetteville-Lumberton in 2021 – Production Occupations (around 21,000 jobs), Food Preparation and Serving Related Occupations (around 22,200 jobs), Sales and Related Occupations (around 23,100 jobs), and Transportation and Material Moving Occupations (around 23,500 jobs). Each of these groups comprised between 8.7 to 9.7% of the total workforce. Figure 4 shows the statewide and regional distribution of the workforce in each occupational group.

Figure 4. Statewide and regional distribution of occupational groups in 2022.

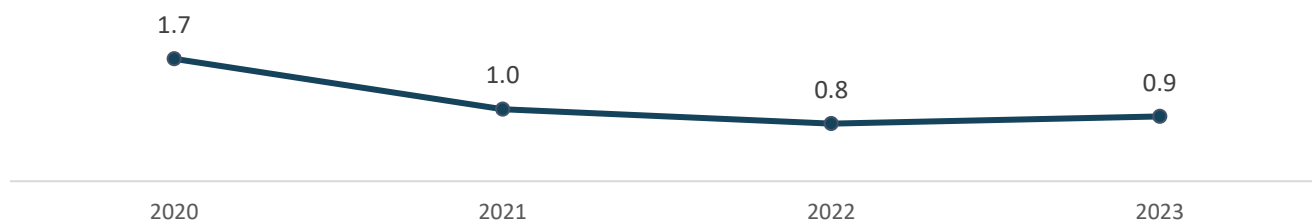


Labor Supply and Demand

Occupational Trends – State Level

Data from the NC Department of Commerce compares the amount of labor supply (the number of persons looking for a job) to labor demand (the number of job openings) at a statewide level. In 2020, this ratio was positive, indicating an oversupply of job seekers relative to job openings. In 2021, the ratio was 1.0, indicating equal supply and demand, whereas in the years since, job openings have outpaced labor. Figure 5 shows statewide average rates of jobseekers to job openings from 2020 to 2023.

Figure 5. Statewide average rate of jobseekers per job opening from 2020-2023.



The trend of decreasing ratios generally holds true across all occupational groups (Table 3). As of 2023, Architecture and Engineering Occupations and Healthcare Support Occupations have the lowest ratios (0.2), indicating that there are approximately five jobs for every job seeker in these fields. In contrast, Life, Physical, and Social Science Occupations (2.3), Arts, Design, Entertainment, Sports, and Media Occupations (1.9), and Construction and Extraction Occupations (1.9) have the highest ratios, indicating that there are about twice as many jobseekers as there are available jobs.

Table 3. Statewide average rate of jobseekers per job opening by occupational group from 2020-2023.

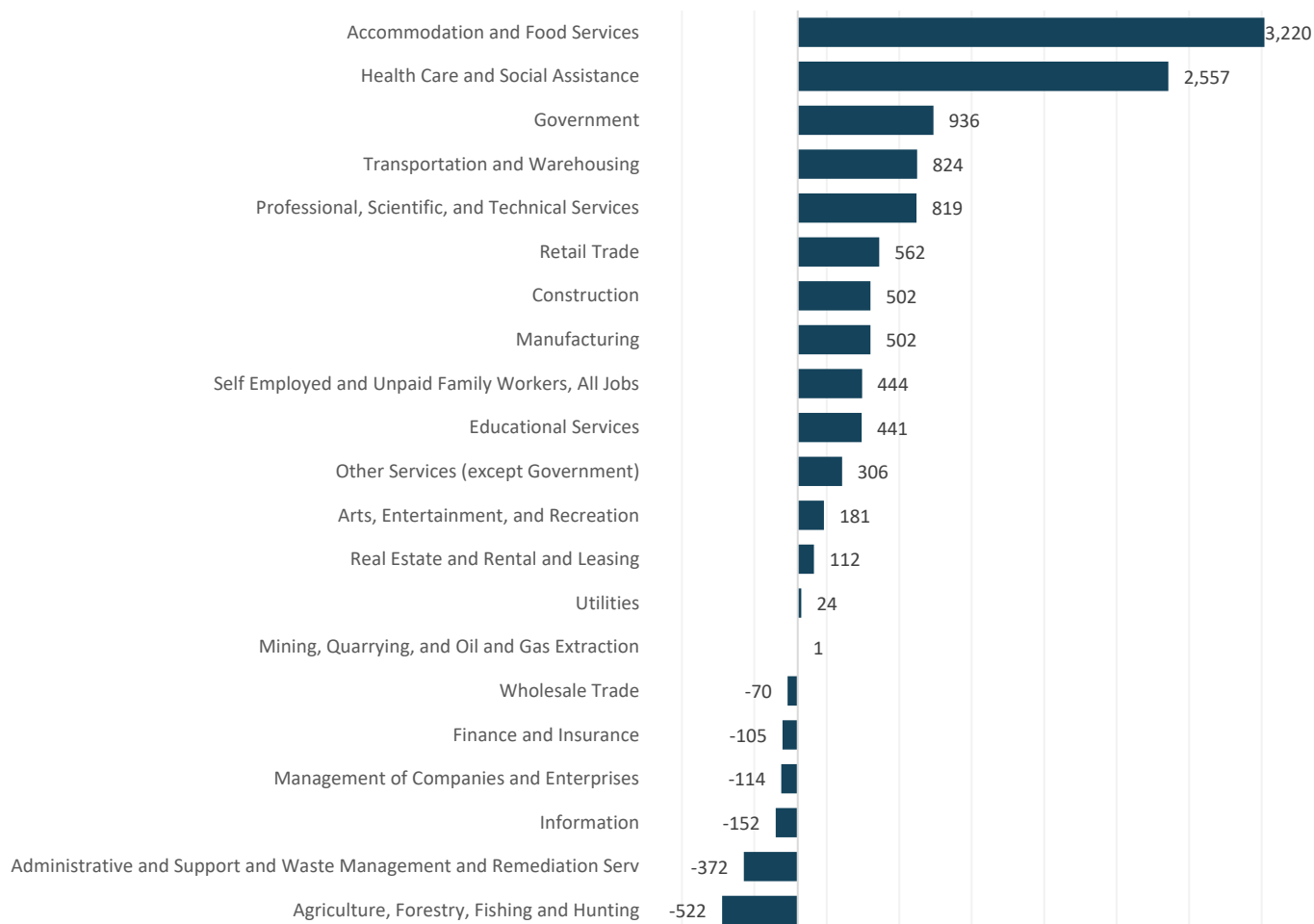
Occupational Group	2020	2021	2022	2023
Architecture and Engineering	1.0	0.4	0.4	0.2
Healthcare Support	0.6	0.8	0.4	0.2
Installation, Maintenance, and Repair	0.9	0.3	0.4	0.3
Business and Financial Operations	1.2	0.9	0.5	0.5
Healthcare Practitioners and Technical	1.0	0.7	0.7	0.5
Community and Social Service	1.9	1.9	0.8	0.7
Food Preparation and Serving Related	1.2	0.5	0.5	0.7
Transportation and Material Moving	2.2	0.8	0.8	0.9
Building and Grounds Cleaning and Maintenance	1.5	1.6	1.5	1.0
Legal	1.2	0.3	0.8	1.0
Office and Administrative Support	1.2	1.0	0.8	1.0
Protective Service	1.3	0.8	0.5	1.0
Educational Instruction and Library	2.8	2.6	1.6	1.1
Production	2.3	1.1	0.8	1.1
Computer and Mathematical	1.7	1.2	1.3	1.2
Management	2.7	1.3	0.9	1.2
Personal Care and Service	3.6	1.8	1.2	1.2
Arts, Design, Entertainment, Sports, and Media	3.1	3.2	2.0	1.9
Construction and Extraction	3.5	2.5	2.2	1.9
Sales and Related	2.5	1.3	1.5	1.9
Life, Physical, and Social Science	2.1	2.6	1.2	2.3
Total (average across all occupational groups)	1.7	1.0	0.8	0.9

Employment Projections

Industry Projections

Based on the latest projections, the Fayetteville-Lumberton region is expected to add over 10,000 jobs between 2022 and 2032. By percentage and raw numbers, the Accommodation and Food Services sector is projected to be the fastest-growing industry in the region, adding 3,220 positions across the ten-year period (a 14.2% increase). Similar in percentage, the Arts, Entertainment, and Recreation sector is projected to add 181 positions (a 12.5% increase), and the Professional, Scientific, and Technical Services sector is projected to add 819 positions (a 10.5% increase). By number of positions, in addition to the Accommodation and Food Services sector, Health Care and Social Assistance (+2,557), Government (+936), Transportation and Warehousing (+824), and Professional, Scientific, and Technical Services (+819) will add the most positions. These five sectors account for 8,356 or over 82% of the newly available positions. In contrast, while most industry sectors are expected to grow in the Fayetteville-Lumberton region, six are projected to lose jobs by 2032. Of those expected to lose positions, two sectors – Administrative and Support and Waste Management and Remediation Services and Agriculture, Forestry, Fishing and Hunting Information – are expected to lose over 300 jobs, representing a 3.3% and 13.2% decrease in available positions, respectively. Figure 6 shows the projected net growth across the ten-year period for each industry sector.

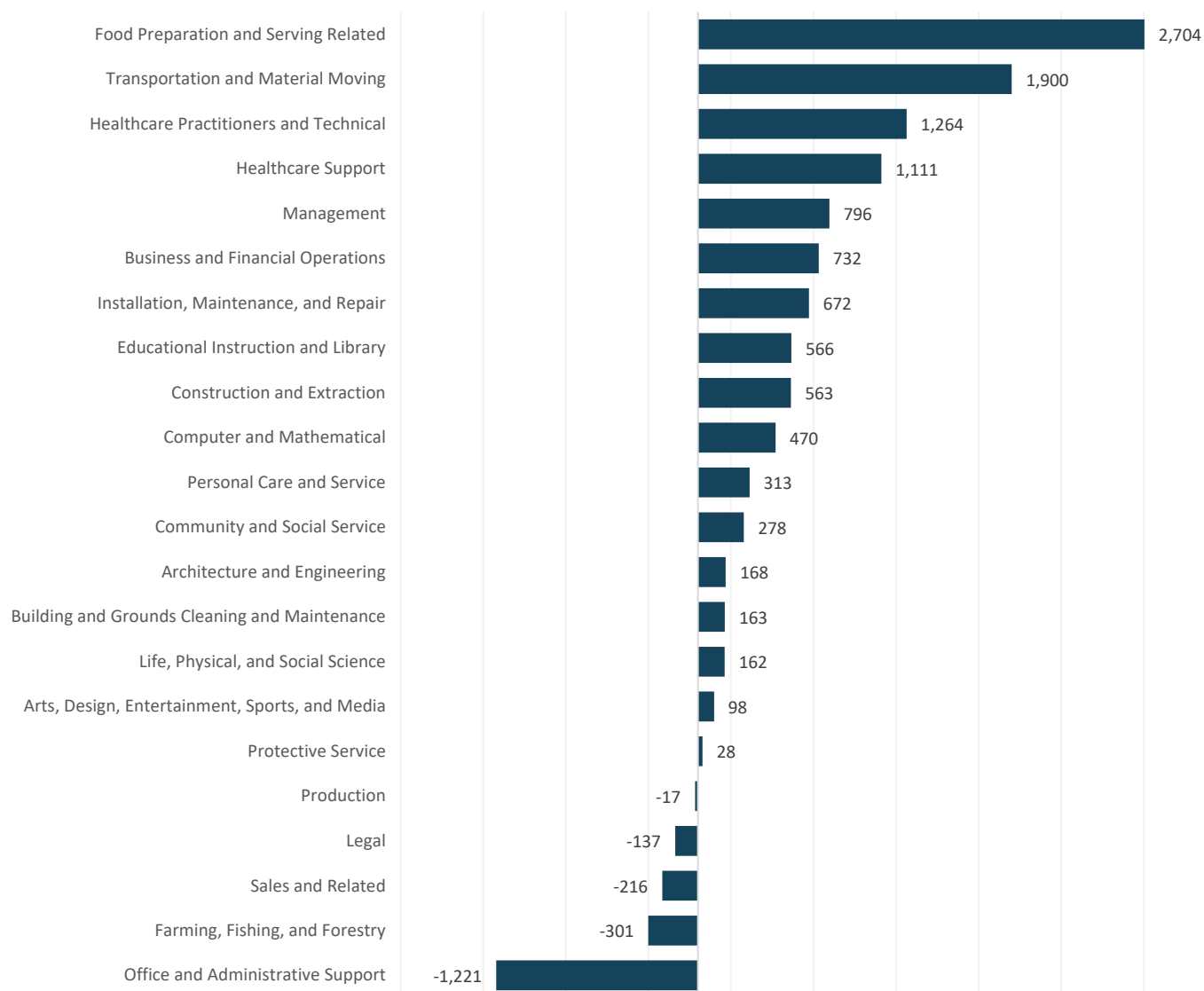
Figure 6. Regional projections for net growth of industry sectors from 2022 to 2032.



Occupational Group Projections

Occupational employment is divided among twenty-two occupational groups, twelve of which are expected to change by less than 500 positions in the Fayetteville-Lumberton region between 2022 and 2032. Given the small share of the occupational group, this still represents a 14.4% net increase for Computer and Mathematical Occupations (+470 jobs). Five groups are expected to lose positions: Production Occupations (-17 jobs), Legal Occupations (-137 jobs), Sales and Related Occupations (-216 jobs), Farming, Fishing, and Forestry Occupations (-301 jobs), and Office and Administrative Support Occupations (-1,221 jobs). Meanwhile, four groups are expected to gain over 1,000 positions (namely, Healthcare Support Occupations (+1,111 jobs), Healthcare Practitioners and Technical Occupations (+1,264 jobs), Transportation and Material Moving Occupations (+1,900 jobs), and Food Preparation and Serving Related Occupations (+2,704 jobs)). These four occupational groups will collectively add around 7,000 positions, which accounts for over two-thirds of the net change in positions (+10,096) in the Fayetteville-Lumberton region between 2022 and 2032. Figure 7 shows the projected net growth across the ten-year period for each occupational group.

Figure 7. Regional projections for net growth of occupational groups from 2022 to 2032.



Focused Occupational Projections

Occupational Projections

Specific occupational projections are considered to provide a more granular look at which jobs are expected to have the most openings between 2022 and 2032 based on an annual average of the NC Department of Commerce employment projections. Based on an internal analysis of program alignment, occupations either minimally requiring or preferring a community college credential were included in the analysis.

In Fayetteville-Lumberton, the twenty-five occupations with the highest average annual openings range from Pharmacy Technicians (101) to Home Health and Personal Care Aides (792). In total, these occupations account for 5,998 annual openings. Other occupations with a high number of annual openings include Nursing Assistants (577), Heavy and Tractor-Trailer Truck Drivers (433), First-Line Supervisors of Food Preparation and Serving Workers (406), Registered Nurses (333), and Maintenance and Repair Workers (280). Meanwhile, occupations toward the lower end of the top twenty-five include Accountants and Auditors, First-Line Supervisors of Construction Trades and Extraction Workers, and Police and Sheriff's Patrol Officers.

Current Earnings

In the Fayetteville-Lumberton region, median annual earnings among the top twenty-five occupations range from \$25,223 (Teaching Assistants, Except Postsecondary) to \$92,466 (Business Operations Specialists). Twelve of the top twenty-five have annual median earnings under \$40,000, while four have annual median earnings between \$40,001 and \$50,000. Other occupations with lower annual median earnings include Nursing Assistants, Preschool Teachers, Childcare Workers, and Home Health and Personal Care Aides. Meanwhile, occupations with the highest annual earnings include First-Line Supervisors of Construction Trades and Extraction Workers (\$59,409); Farmers, Ranchers, and Other Agricultural Managers (\$70,520); Accountants and Auditors (\$73,192); and Registered Nurses (\$82,699).

Table 4 includes occupation titles, median earnings, and average annual openings for 25 Standard Occupation Code (SOC) titles with the largest number of annual openings. Two additional tables are available in the Appendices – one that details the 50 SOC occupation titles with the largest number of annual openings that require or prefer either a minimum of a high school credential or a community college credential (Table 8), and one that details the 50 SOC occupation titles with the largest number of annual openings that require a minimum of a Bachelor's degree (Table 9).

Table 4. Regional summary of the top 25 SOC occupation titles with the highest number of average annual openings.

Occupation Title	Median Earnings	Annual Openings
Home Health and Personal Care Aides	\$28,192	792
Nursing Assistants	\$35,002	577
Heavy and Tractor-Trailer Truck Drivers	\$50,454	433
First-Line Supervisors of Food Preparation and Serving Workers	\$37,603	406
Registered Nurses	\$82,699	333
Maintenance and Repair Workers, General	\$41,492	280
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	\$39,886	274
Bookkeeping, Accounting, and Auditing Clerks	\$41,147	265
Teaching Assistants, Except Postsecondary	\$25,223	256
Childcare Workers	\$29,267	243
Miscellaneous Assemblers and Fabricators	\$37,148	234
Light Truck Drivers	\$37,123	223
Business Operations Specialists, All Other	\$92,466	191
Farmers, Ranchers, and Other Agricultural Managers	\$70,520	185
Preschool Teachers, Except Special Education	\$30,603	148
Automotive Service Technicians and Mechanics	\$47,956	128
Medical Assistants	\$39,121	126
Correctional Officers and Jailers	\$48,999	124
First-Line Supervisors of Production and Operating Workers	\$64,080	117
Bus Drivers, School	\$35,266	117
Licensed Practical and Licensed Vocational Nurses	\$59,012	116
Accountants and Auditors	\$73,192	114
First-Line Supervisors of Construction Trades and Extraction Workers	\$67,109	108
Police and Sheriff's Patrol Officers	\$52,577	107
Pharmacy Technicians	\$39,992	101

Community College Completers and Earnings

This section summarizes the top 25 Classification of Instructional Programs (CIP) codes with the highest number of completers in the region. “Completers” is defined as the unduplicated student count of Curriculum students successfully completing (i.e., graduating with) an AAS, Diploma, Certificate, or workforce continuing education students with 144+ hours of coursework aligned with workplace entry. It should be noted that the completion count is based on student county of residence, regardless of which college they are enrolled in. One important exclusion that results from this methodology is that those in the military with county residencies outside the state are not included in the completion counts.

Estimated median earnings are based on the earnings in the third year after exit of community college graduates who earned either an AAS, Diploma, or Certificate. For this report, exiters from 2016-17 through 2019-20 are included. Those with any post-secondary enrollment after exit are not included. Earnings are based on the highest quarterly wage record within a year projected out to an annual estimate.

In the Fayetteville-Lumberton region, the top 25 CIPs ranged from 47 completers to 586 completers. Six produced more than 300 completers; these include Business Administration and Management; Nursing Assistant/Aide and Patient Care Assistant/Aide; Emergency Medical Technology/Technician (EMT Paramedic); Truck and Bus Driver/Commercial Vehicle Operator and Instructor; Cosmetology/Cosmetologist; and Criminal Justice/Police Science. Table 5 (below) includes instructional program description, estimated median earnings, and completers for the 25 CIPs with the largest number of completers.

Table 5. Regional summary of the top 25 Classification of Instructional Programs (CIPs) with the highest number of completers (2023-24).

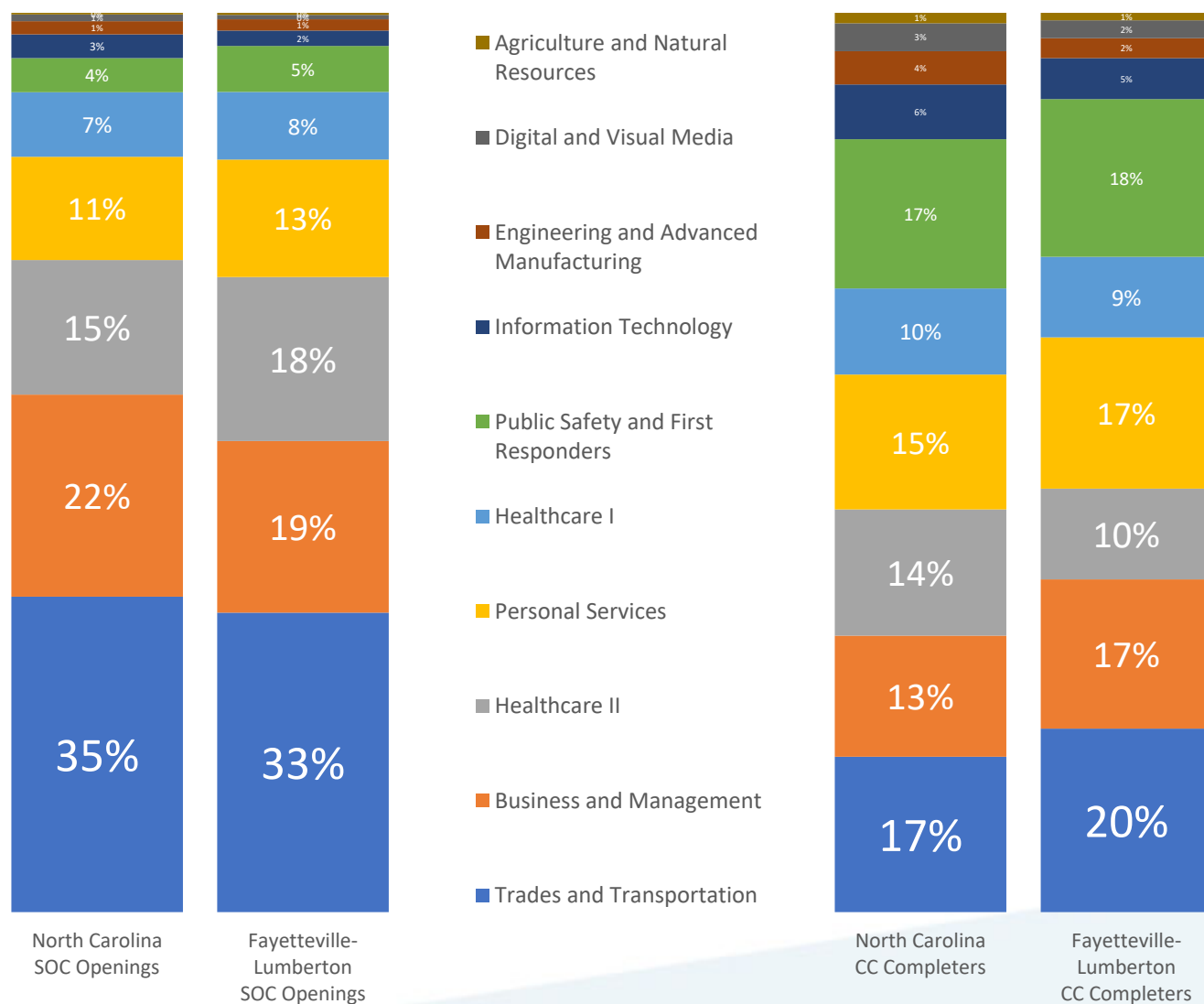
Instructional Program Description	Estimated Median Earnings	Completers
Business Administration and Management, General	\$42,186	586
Nursing Assistant/Aide and Patient Care Assistant/Aide	\$35,062	459
Emergency Medical Technology/Technician (EMT Paramedic)	\$52,156	445
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	\$56,268	426
Cosmetology/Cosmetologist, General	\$31,102	353
Criminal Justice/Police Science	\$50,512	334
Information Technology	\$44,002	272
Registered Nursing/Registered Nurse	\$85,072	243
Medical Office Management/Administration	\$36,814	210
Welding Technology/Welder	\$52,188	198
Early Childhood Education and Teaching	\$32,452	185
Criminal Justice/Safety Studies	\$36,966	172
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Tech	\$50,192	150
Accounting and Finance	\$38,864	114
Licensed Practical/Vocational Nurse Training	\$53,920	99
Automobile/Automotive Mechanics Technology/Technician	\$47,118	97
Electrician	\$57,000	94
Barbering/Barber	\$24,072	89
Autobody/Collision and Repair Technology/Technician	\$39,660	88
Culinary Arts/Chef Training	\$27,220	76
Commercial and Advertising Art	\$22,174	67
Kindergarten/Preschool Education and Teaching	\$34,164	61
Building/Construction Finishing, Management, and Inspection, Other	\$57,384	59
Child Development	\$32,548	51
Fire Prevention and Safety Technology/Technician	\$42,164	47

*Represents a cell with insufficient data to calculate median.

PropelNC Workforce Sector Occupation Projections and Community College Completers

Occupations where a community college credential is either required or identified as employer preferred were categorized into PropelNC-related workforce sectors. Similarly, this categorization was applied to programs and coursework associated with community college completers. Please note that some PropelNC workforce sectors were either combined or split for reporting purposes. Like the state, the largest share of PropelNC occupations in the Fayetteville-Lumberton region were in Trades and Transportation (33.3%). This was followed by Business and Management (19.1%), Healthcare II (18.2%), Personal Services (13.0%), and Healthcare I (7.5%). As for community college completers, the largest share of PropelNC completers in the Fayetteville-Lumberton region was also Trades and Transportation (20.4%). This was followed by Public Safety and First Responders (17.5%), Personal Services (16.8%), Business and Management (16.6%), and Healthcare II (10.1%). Figure 8 shows the statewide and regional distribution projected annual openings and 2023-24 community college completers by PropelNC workforce sector.

Figure 8. Statewide and regional distribution projected annual openings and 2023-24 community college completers by PropelNC workforce sector.



Economic Development Projects

Between 2019 and 2024, the Fayetteville-Lumberton region reported 60 economic development projects, adding a total of 4,806 jobs and \$2.0 billion in capital investment. Across the six-year period, the Fayetteville-Lumberton region saw the greatest job creation in 2022 (1,619 jobs), but the greatest investment in 2024 (\$1.1 billion). The region experienced an increase in job creation year-over-year from 2020-2022, followed by a sharp decline in 2023. In comparison, statewide job creation was highest in 2022, with nearly 30,000 jobs created from project announcements that year. This corresponds with over \$20 billion in investments, which was the highest annual investment during the time period. The following figures show a comparison between annual statewide and regional job creation (Figure 9) and investment (Figure 10) from project announcements during the six-year period.

Figure 9. Statewide and regional job creation from project announcements by year from 2019 through 2024.

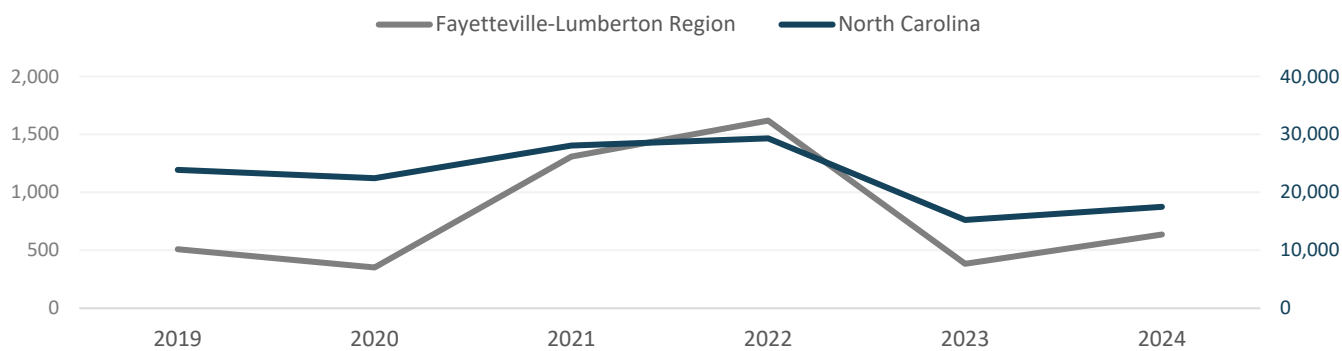
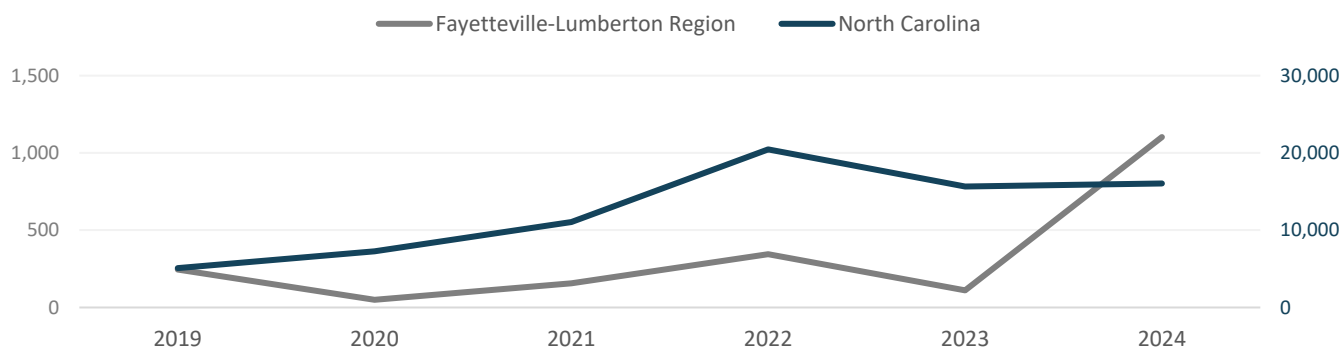


Figure 10. Statewide and regional investment from project announcements by year from 2019 through 2024 (in millions).



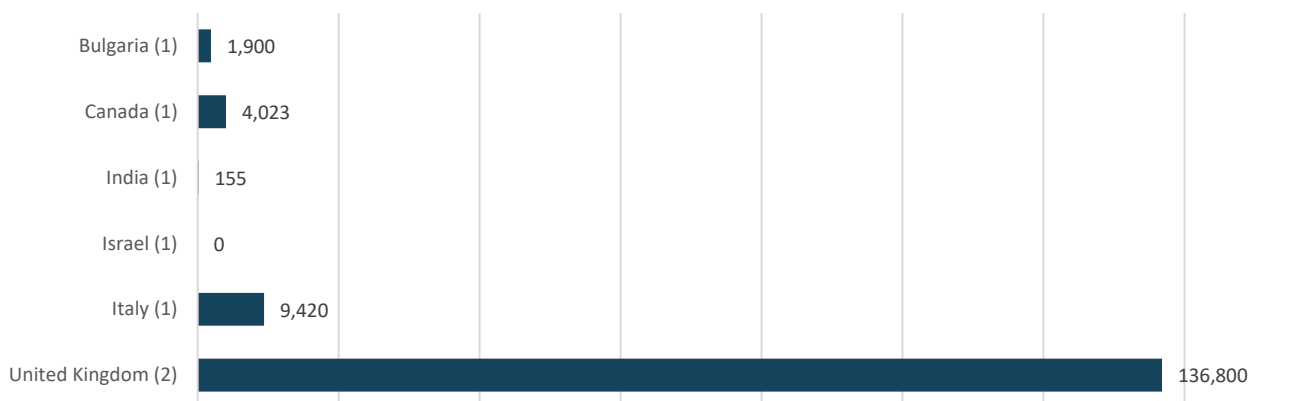
In the Fayetteville-Lumberton region, the industry sectors with the highest number of jobs included Food, Beverage and Agriculture (1,253 jobs), Transportation and Logistics (707 jobs), and Aerospace/Aviation (347 jobs). Meanwhile, the industry sectors with the highest investment (in thousands) included Aerospace/Aviation (\$900,265), Food, Beverage and Agriculture (\$346,074), and Automotive (\$205,002). Table 6 shows the number of projects, announced jobs, and investment by industry sector from 2019 through 2024.

Table 6. Regional Number of Projects, Announced Jobs, and Investment by Industry Sector from 2019-2024.

Industry Sector	Number of Projects	Announced Jobs	Investment (in thousands)
Aerospace/Aviation	3	347	900,265
Automotive	5	142	205,002
Automotive/Motor Vehicles	2	56	5,635
Biotechnology, Pharmaceuticals and Life Sciences	3	55	5,822
Business and Financial Services	4	289	70,255
Chemicals, Plastics and Rubber	4	141	18,429
Energy	1	60	50,000
Food, Beverage and Agriculture	11	1,253	346,074
Furniture and Home Furnishings	2	223	34,190
Information Technology	2	163	1,350
Military/Defense	1	25	3,000
Other	12	961	177,795
Textiles	4	334	1,741
Transportation and Logistics	3	707	110,750

The announced projects included 7 total foreign direct investment projects from 6 different countries, including the United Kingdom (2 projects), Italy (1 project), and Canada (1 project). Foreign-based companies often seek partnerships with local community colleges to establish a talent pipeline, through apprenticeship programs or other custom training opportunities. Figure 11 shows the cumulative investment of all countries who announced projects in the region from 2019 through 2024.

Figure 11. Investment (in thousands) per Foreign Direct Investment Parent Country. Project Count in Parentheses.



Appendix

Technical Documentation

Table 7. Summary of data sources.

Section	Sub-section(s)	Description	Source
<i>Employment</i>			
	Employment Trends; Employment by County	<i>The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment reported by employers covering more than 95 percent of U.S. jobs, available at the county, metropolitan statistical area, state, and national levels by industry.</i> URL: https://d4.nccommerce.com/QCEWSelection.aspx Dates: 2018-2023	Quarterly Census of Employment and Wages: N.C. Department of Commerce & U.S. Department of Labor
	Unemployment Rate Trends; Unemployment Rate by County	<i>The Local Area Unemployment Statistics (LAUS) program is a federal-state cooperative effort in which monthly estimates of total employment and unemployment are prepared.</i> URL: https://d4.nccommerce.com/LausSelection.aspx Dates: 2018-2023	Local Area Unemployment Statistics: N.C. Department of Commerce & U.S. Department of Labor
<i>Existing Industry Sectors and Occupational Groups</i>			
	Industry Sectors; Occupational Groups	<i>Two measures of employment produced by the U.S. Bureau of Labor Statistics (BLS) are used to determine base year employment: (1) the Current Employment Statistics (CES) survey, an establishment survey that provides data on wage and salary employment and weekly hours for most nonagricultural industries and the logging industry, and (2) the Current Population Survey (CPS), a household survey that includes information regarding agricultural employment, self-employed workers and hours, and private household workers.</i> URL: https://tools.nccareers.org/employmentprojections/about.html Dates: 2022	Employment Projections Program: N.C. Department of Commerce & U.S. Department of Labor
<i>Labor Supply and Demand</i>			
	Labor Supply and Demand	<i>The amount of labor supply—the number of persons looking for a job, by occupation and place of residence—is estimated using labor force data from federal household surveys. Occupational trends are derived from labor force data on experienced workers from the U.S. Bureau of Labor Statistics’ (BLS) Current Population Survey (CPS). The amount of labor demand—the number of job openings, by occupation and place of work—is estimated using online job postings data and federal surveys of employers. Data on job openings at the state level come from the BLS’s Job Openings and Labor Turnover Survey (JOLTS).</i> URL: https://analytics.nccommerce.com/NC-Labor-Supply-Demand/ Dates: 2020-2023	NC Labor Supply and Demand: N.C. Department of Commerce & U.S. Department of Labor
<i>Employment Projections</i>			
	Industry Projections; Occupational Group Projections	<i>Every two years, in conjunction with the Bureau of Labor Statistics (BLS), the North Carolina Department of Commerce publishes long-term industry and occupational employment projections for statewide and sub-state areas. The employment projections are an estimate of the future demand for workers based on historical employment data and various economic factors.</i> URL: https://tools.nccareers.org/employmentprojections/about.html Dates: 2022, 2032 projections	Employment Projections Program: N.C. Department of Commerce & U.S. Department of Labor

Focused Occupational Projections and Current Earnings

Occupational Projections	<p>Occupational projections were calculated using the methodology described above for “Occupational Group Projections.” Based on an internal analysis of program alignment, occupations either minimally requiring or preferring a community college credential were included in the analysis.</p> <p>URL: https://tools.nccareers.org/employmentprojections/about.html</p> <p>Dates: 2022, 2032 projections</p>	<p>Employment Projections Program: N.C. Department of Commerce & U.S. Department of Labor</p>
Current Earnings	<p><i>LEAD utilizes industry employment data derived from the Enhanced Quarterly Unemployment Insurance (EQUI) dataset. The data contains a quarterly count of employment and wages report that is sent from employers based on the North American Industry Classification System (NAICS) code. Employment data on uncovered industries within the Unemployment Insurance (UI) program is collected from other sources such as Current Employment Statistics (CES), Census Bureau, and Railroad Retirement Board.</i></p> <p>Dates: 2022</p>	<p>Enhanced Quarterly Unemployment Insurance (EQUI) dataset: N.C. Department of Commerce & U.S. Department of Labor</p>

Community College Completers and Earnings

Community College Completers	<p>“Completers” is defined as the unduplicated student count of Curriculum students successfully completing (i.e., graduating with) an AAS, Diploma, Certificate, or workforce continuing education students with 144+ hours of coursework aligned with workplace entry.</p> <p>Dates: 2023-2024 academic year</p>	North Carolina Community Colleges
Estimated Median Salary	<p>Estimated median earnings are based on the earnings in the third year after exit of community college graduates who earned either an AAS, Diploma, or Certificate. For this report, exiters from 2016-17 through 2019-20 are included. Those with any postsecondary enrollment after exit are not included. Earnings are based on the highest quarterly wage record within a year projected out to an annual estimate.</p> <p>Dates: graduates from 2016-17 through 2019-20; wages from 2019-20 through 2022-23</p>	North Carolina Community Colleges; National Student Clearinghouse (NSC); Common Follow-up System (CFS)

PropelNC Workforce Sector Occupation Projections and Community College Completers

PropelNC Workforce Sector Occupation Projections and Community College Completers	<p>See methodology for occupational projections and community college completers above. Occupations were categorized into PropelNC-related workforce sectors. Similarly, this categorization was applied to curriculum programs and workforce continuing education coursework associated with community college completers. Please note that some PropelNC workforce sectors were either combined or split for reporting purposes.</p>	North Carolina Community Colleges
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Economic Development Projects

Economic Development Projects	<p>The North Carolina Economic Development Activity Report is a comprehensive picture of job and investment growth, tracking job and capital investment of economic development projects, by county, across the state of North Carolina.</p> <p>URL: https://cir.edpnc.com/</p> <p>Dates: 2019-2024</p>	North Carolina Economic Development Activity Report (EDAR): The Economic Development Partnership of North Carolina (EDPNC)
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**Italics indicate that the text is copied directly from documentation provided by the data producers.*

Detailed Data Tables

Table 8. Summary of the top 50 SOC occupation titles, where a community college education is either required or preferred, with the highest number of annual openings in the Fayetteville-Lumberton region.

Occupation Title	Median Earnings	Annual Openings
Home Health and Personal Care Aides	\$28,192	792
Nursing Assistants	\$35,002	577
Heavy and Tractor-Trailer Truck Drivers	\$50,454	433
First-Line Supervisors of Food Preparation and Serving Workers	\$37,603	406
Registered Nurses	\$82,699	333
Maintenance and Repair Workers, General	\$41,492	280
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	\$39,886	274
Bookkeeping, Accounting, and Auditing Clerks	\$41,147	265
Teaching Assistants, Except Postsecondary	\$25,223	256
Childcare Workers	\$29,267	243
Miscellaneous Assemblers and Fabricators	\$37,148	234
Light Truck Drivers	\$37,123	223
Business Operations Specialists, All Other	\$92,466	191
Farmers, Ranchers, and Other Agricultural Managers	\$70,520	185
Preschool Teachers, Except Special Education	\$30,603	148
Automotive Service Technicians and Mechanics	\$47,956	128
Medical Assistants	\$39,121	126
Correctional Officers and Jailers	\$48,999	124
First-Line Supervisors of Production and Operating Workers	\$64,080	117
Bus Drivers, School	\$35,266	117
Licensed Practical and Licensed Vocational Nurses	\$59,012	116
Accountants and Auditors	\$73,192	114
First-Line Supervisors of Construction Trades and Extraction Workers	\$67,109	108
Police and Sheriff's Patrol Officers	\$52,577	107
Pharmacy Technicians	\$39,992	101
Medical Secretaries and Administrative Assistants	\$37,899	97
Human Resources Specialists	\$64,042	96
Electricians	\$51,812	93
Dental Assistants	\$46,244	92
First-Line Supervisors of Mechanics, Installers, and Repairers	\$72,701	89
Industrial Machinery Mechanics	\$63,395	82
Firefighters	\$41,353	80
Management Analysts	\$92,856	76
Food Service Managers	\$62,480	71
Carpenters	\$41,369	71
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	\$66,378	71
Hairdressers, Hairstylists, and Cosmetologists	\$36,752	68
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	\$51,391	68
Operating Engineers and Other Construction Equipment Operators	\$46,270	65
Computer Occupations, All Other	\$93,503	64
Plumbers, Pipefitters, and Steamfitters	\$51,350	60
Buyers and Purchasing Agents	\$63,016	59
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders	*	57
Logisticians	\$86,662	55
Real Estate Sales Agents	\$39,246	55
Welders, Cutters, Solderers, and Brazers	\$49,807	52
Bus and Truck Mechanics and Diesel Engine Specialists	\$52,012	49
Computer User Support Specialists	\$54,969	46
Veterinary Assistants and Laboratory Animal Caretakers	\$37,004	45
First-Line Supervisors of Housekeeping and Janitorial Workers	\$41,167	44

*Represents a cell with insufficient data to calculate median.

Table 9. Summary of the top 50 SOC occupation titles (including ties), where a Bachelor’s degree is either required or preferred, with the highest number of annual openings in the Fayetteville-Lumberton region.

Occupation Title	Median Earnings	Annual Openings
General and Operations Managers	\$95,937	311
Elementary School Teachers, Except Special Education	\$51,234	205
Managers, All Other	\$121,129	127
Secondary School Teachers, Except Special and Career/Technical Education	\$52,247	126
Construction Managers	\$98,918	99
Medical and Health Services Managers	\$113,669	88
Clergy	\$57,304	82
Child, Family, and School Social Workers	\$51,375	81
Teachers and Instructors, All Other	\$80,545	75
Middle School Teachers, Except Special and Career/Technical Education	\$51,156	72
Training and Development Specialists	\$52,701	58
Market Research Analysts and Marketing Specialists	\$65,690	57
Religious Workers, All Other	*	56
Educational Instruction and Library Workers, All Other	\$47,100	51
Software Developers	\$114,312	45
Coaches and Scouts	\$45,547	37
Career/Technical Education Teachers, Postsecondary	\$65,159	36
Financial Managers	\$123,834	33
Compliance Officers	\$62,834	33
Social Scientists and Related Workers, All Other	\$102,557	31
Education Administrators, All Other	\$104,209	30
Securities, Commodities, and Financial Services Sales Agents	\$47,260	30
Loan Officers	\$59,334	24
Industrial Engineers	\$92,688	24
Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	\$51,939	24
Computer and Information Systems Managers	\$128,352	23
Kindergarten Teachers, Except Special Education	\$53,413	23
Sales Managers	\$90,668	22
Industrial Production Managers	\$108,755	22
Social and Community Service Managers	\$65,933	22
Social Workers, All Other	\$92,609	22
Cost Estimators	\$61,549	21
Career/Technical Education Teachers, Secondary School	\$53,816	21
Special Education Teachers, Kindergarten and Elementary School	\$51,818	20
Occupational Health and Safety Specialists	\$86,860	19
Civil Engineers	\$86,506	18
Personal Financial Advisors	\$102,429	17
Community and Social Service Specialists, All Other	\$46,579	17
Public Relations Specialists	\$64,800	16
Special Education Teachers, Secondary School	\$49,565	15
Environmental Scientists and Specialists, Including Health	\$62,001	14
Writers and Authors	\$46,728	14
Interpreters and Translators	\$52,178	14
Agricultural Inspectors	\$48,890	14
Probation Officers and Correctional Treatment Specialists	\$53,604	13
Marketing Managers	\$120,600	12
Administrative Services Managers	\$84,370	12
Financial Examiners	*	12
Directors, Religious Activities and Education	\$58,298	12
Special Education Teachers, Middle School	*	12
Graphic Designers	\$46,451	12

*Represents a cell with insufficient data to calculate median.

Table 10. Summary of the top 50 Classification of Instructional Programs (CIPs, including ties) with the highest number of completers.

Instructional Program Description	Estimated Median Salary	Completers
Business Administration and Management, General	\$42,186	586
Nursing Assistant/Aide and Patient Care Assistant/Aide	\$35,062	459
Emergency Medical Technology/Technician (EMT Paramedic)	\$52,156	445
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	\$56,268	426
Cosmetology/Cosmetologist, General	\$31,102	353
Criminal Justice/Police Science	\$50,512	334
Information Technology	\$44,002	272
Registered Nursing/Registered Nurse	\$85,072	243
Medical Office Management/Administration	\$36,814	210
Welding Technology/Welder	\$52,188	198
Early Childhood Education and Teaching	\$32,452	185
Criminal Justice/Safety Studies	\$36,966	172
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Tech	\$50,192	150
Accounting and Finance	\$38,864	114
Licensed Practical/Vocational Nurse Training	\$53,920	99
Automobile/Automotive Mechanics Technology/Technician	\$47,118	97
Electrician	\$57,000	94
Barbering/Barber	\$24,072	89
Autobody/Collision and Repair Technology/Technician	\$39,660	88
Culinary Arts/Chef Training	\$27,220	76
Commercial and Advertising Art	\$22,174	67
Kindergarten/Preschool Education and Teaching	\$34,164	61
Building/Construction Finishing, Management, and Inspection, Other	\$57,384	59
Child Development	\$32,548	51
Fire Prevention and Safety Technology/Technician	\$42,164	47
Radiologic Technology/Science - Radiographer	\$59,048	41
Game and Interactive Media Design	*	38
Electromechanical Technologies/Technicians, Other	\$68,880	36
Clinical/Medical Laboratory Technician	\$50,198	36
Aesthetician/Esthetician and Skin Care Specialist	\$31,200	35
Massage Therapy/Therapeutic Massage	\$29,374	35
Respiratory Care Therapy/Therapist	\$77,742	34
Forensic Science and Technology	\$36,848	30
Office Management and Supervision	\$32,878	30
Computer Numerically Controlled (CNC) Machinist Technology/CNC Machinist	*	29
Dental Assisting/Assistant	\$38,972	28
Funeral Service and Mortuary Science, General	\$54,116	27
Educational Leadership and Administration, General	\$37,010	27
Language Interpretation and Translation	*	27
Phlebotomy Technician/Phlebotomist	\$30,844	26
Electrical, Electronic, and Communications Engineering Technology/Technician	\$52,544	24
Surgical Technology/Technologist	\$51,168	23
Hair Styling/Stylist and Hair Design	*	23
Health/Health Care Administration/Management	*	23
Crisis/Emergency/Disaster Management	*	22
Dental Hygiene/Hygienist	\$67,798	21
Architectural Engineering Technologies/Technicians	\$42,202	20
Medical/Clinical Assistant	\$35,122	18
Mental and Social Health Services and Allied Professions, Other	*	18
Agribusiness/Agricultural Business Operations	*	18
Applied Horticulture/Horticulture Operations, General	*	18

*Represents a cell with insufficient data to calculate median.

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