



ECONOMIC IMPACT AND ANALYSIS Lee County

This chapter examines a number of key economic indicators in order to provide an overview of contemporary economic trends in Lee County. The first portion of the analysis focuses on historic employment trends for the county, as well as the Fort Benning Regional Growth Management Plan (RGMP) study area and the state, based on changes in employment, wages and establishments at the detailed sector level. This is followed by a brief description of recent and ongoing economic initiatives that includes a listing of major business openings, layoffs and closings throughout the region. The second half of the chapter reviews changes in the labor force and unemployment rates, occupational characteristics of the workforce, and concludes with a summary of journey to work commuting patterns.

Summary of Findings

- As of 2006, Lee County had 48,700 covered (unemployment insurance) workers. This represents a net increase of over 10,280 since 1996, a 26.8% growth rate for the ten-year period. Private sector jobs accounted for 73% of total employment with the remaining 27% in the government sectors.
- Private sector growth (2001-2006) occurred predominantly in the Service Sector, which added over 4,620 jobs, a 22% rate of growth. Goods producing jobs experienced a comparable growth rate of 21% with a net increase of 1,800 jobs.



- Key service sector growth were recorded in Accommodations and Food Service (1,900 jobs) and Transportation and Warehousing (1,223 jobs).
- The County's total average annual wage in 2006 was \$30,468. This was slightly below the study area's average annual wage of \$31,418.
- The Lee County labor force increased by 32% (16,221) from 1997 to 2007. The study area's labor force increased by 8.2% while the State of Alabama labor force grew by 2.5% during the same time period.
- Over 68% of the Lee County residents work in the county. This is the highest percentage of all study area counties and higher than the county's rate as a regional employer. The second largest destination receiving the county's commuters is Columbus-Muscogee (16.1%).

Historic Employment Trends

This section provides a historical perspective of employment trends for Lee County between 1996 and 2006. The section is divided into two parts with the first providing a general overview of the change in total employment by the major public/private sectors. The second portion offers a more detailed level of analysis examining change by industry sector for the five-year period between 2001 and 2006. This detailed data is derived from the Quarterly Census of Employment and Wages (QCEW) and summarized based on the North American Industry Classification System (NAICS). The QCEW data, which is collected by the U.S. Bureau of Labor Statistics (BLS), represents covered employment statistics that include all workers who are covered under the state unemployment insurance (UI) laws and federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program. The QCEW data does not include members of the armed forces, the self-employed, and proprietors; however, supplemental data compiled by the U.S. Bureau of Economic Analysis (BEA) has been included to illustrate estimated employment in these categories.

Overview of Total Employment

As of 2006, Lee County had total covered employment of approximately 48,700 as illustrated in Table 1. This figure represents a net increase of over 10,280 since 1996, a 26.8% growth rate for the ten-year period. In comparison, employment in the study area as a whole grew at a substantially slower rate of 9.6% during that time period with a net increase of 15,860 jobs. Overall, Lee County accounted for approximately 27% of the study area's total employment base as of 2006.



Table 1 also shows the two five-year intervals (1996-2001 and 2001-2006) of Lee County's ten-year employment growth trend. These partial growth rates reveal that the county experienced a larger increase in employment during the second half of the decade (2001-2006) as compared to the first half with respective growth rates of 5.6% and 20%. The study area experienced a comparable growth rate early in the decade but did not share in the county's later growth spurt, and actually experienced a decrease in growth rates from 5% to 4.4% for the two respective time intervals.

Industry	Employment			Change			Percent Change			Percent of Total		
	1996	2001	2006	96-01	01-06	96-06	96-01	01-06	96-06	1996	2001	2006
Total Employment	38,408	40,571	48,694	2,163	8,123	10,286	5.6%	20.0%	26.8%	100%	100%	100%
Total Government	10,549	11,272	12,976	723	1,704	2,427	6.9%	15.1%	23.0%	27%	28%	27%
Federal	335	347	337	12	(10)	2	3.6%	-2.9%	0.6%	1%	1%	1%
State	5,247	4,919	5,384	(328)	465	137	-6.3%	9.5%	2.6%	14%	12%	11%
Local	4,967	6,006	7,255	1,039	1,249	2,288	20.9%	20.8%	46.1%	13%	15%	15%
Total Private	27,859	29,299	35,718	1,440	6,419	7,859	5.2%	21.9%	28.2%	73%	72%	73%
Goods Producing	10,098	8,415	10,208	(1,683)	1,793	110	-16.7%	21.3%	1.1%	26%	21%	21%
Service Producing	17,761	20,884	25,510	3,123	4,626	7,749	17.6%	22.2%	43.6%	46%	51%	52%

Industry	Employment			Change			Percent Change			Percent of Total		
	1996	2001	2006	96-01	01-06	96-06	96-01	01-06	96-06	1996	2001	2006
Total Employment	165,509	173,787	181,369	8,278	7,582	15,860	5.0%	4.4%	9.6%	100%	100%	100%
Total Government	34,258	36,190	38,239	1,932	2,049	3,981	5.6%	5.7%	11.6%	21%	21%	21%
Federal	5,867	6,092	5,730	225	(362)	(137)	3.8%	-5.9%	-2.3%	4%	4%	3%
State	9,728	9,533	10,224	(195)	691	496	-2.0%	7.2%	5.1%	6%	5%	6%
Local	18,490	20,347	22,285	1,857	1,938	3,795	10.0%	9.5%	20.5%	11%	12%	12%
Total Private	131,249	137,595	142,879	6,346	5,284	11,630	4.8%	3.8%	8.9%	79%	79%	79%
Goods Producing	42,444	39,847	34,771	(2,597)	(5,076)	(7,673)	-6.1%	-12.7%	-18.1%	26%	23%	19%
Service Producing	88,804	97,746	108,109	8,942	10,363	19,305	10.1%	10.6%	21.7%	54%	56%	60%

Source: US Bureau of Labor Statistics

Table 1 Total Covered Employment 1996-2006

Private sector jobs in Lee County account for 73% of total employment with the remaining 27% in the government sectors. The study area had a somewhat lower percentage of government jobs in 2006 with 21%. The county's large percentage of government jobs is partially attributable to state employment associated with Auburn University; however, local government accounts for the majority of employment in this sector, which is reflective of the existence of two larger cities, Auburn and Opelika, within the data. Over the last decade, employment growth in private sector jobs has outpaced government sector growth but by only five percent. Between 1996 and 2006, total government jobs experienced a net growth rate of over 23%, with over 2,280 added at the local level representing a growth rate of 46.1%. During this time period private sector jobs grew by 28%, which was largely attributable to sustained growth in service sector jobs that increased by approximately 7,750 over ten years. In comparison, goods producing sectors had a net increase of only 110 jobs resulting from a substantial decline of -16.7% (1,683 jobs) during the first half of the decade. Growth during the latter half of the decade offset these earlier losses with a 21.3% growth rate that



contrasted a net decline of 12.7% for the study area overall between 2001 and 2006. This most recent trend suggests that Lee County may have begun to reverse, or at least stem the losses in traditional manufacturing sectors, such as textiles, still being experienced elsewhere in the region and the state.

In addition to the covered employment discussed above, the BEA estimates that the county had an additional 11,430 workers, as of 2006, employed at proprietary establishments that are typically one-person firms, or family-run businesses, that do not participate in the unemployment insurance program. This figure increased by 64%, or 4,450 over 1996 levels.

Estimated military employment in Lee County as of 2006 was 817, according to BEA data. This figure includes both active military personnel and reservists. Total military employment remained virtually unchanged from 1996 levels despite some fluctuations throughout the course of the decade. When proprietor and military employment estimates are combined with covered employment levels it raises the county's total employment to approximately 60,940 as of 2006.

Detailed Industry Trends

Table 2 presents a more detailed perspective on changes in employment and establishments by major industry sector between 2001 and 2006 for Lee County. Tables in the Appendix provide a more detailed breakout of change by industry subsector at the three- and four-digit NAICS level. As noted in the previous section, the county's total employment increased by 20% representing a net increase of just over 8,120 jobs. This growth was comprised of approximately 6,400 private sector and 1,700 government sector jobs. The number of establishments increased by 381 during this time period, a growth rate of 17.7%.

Private sector growth during this five-year time period occurred predominantly in the service sectors, which added over 4,620 jobs, a 22% rate of growth. Of the net increase of 381 establishments recorded during this time, 305 were service sector establishments. Goods producing jobs experienced a comparable growth rate of 21% with a net increase of almost 1,800 jobs and a net change of 43 additional establishments.

Gains in the Manufacturing sector of just over 1,400 jobs were concentrated largely in the transportation equipment manufacturing subsector (804 jobs), which is reflective of the area's automotive firms (refer to Appendix tables). Other more modest gains were recorded in the fabricated metal manufacturing (153 jobs), plastics/rubber manufacturing



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(176 jobs), and furniture product manufacturing subsectors. As of 2006, Manufacturing accounted for the majority of the county's job base at 15.2%. Other growth in the goods producing category occurred in the Construction sector, which added 337 jobs over five years.

Lee County, AL

NAICS	Industry	Employment				Establishments				
		2001	2006	Change	% Change	% Total 06	2001	2006	Change	% Change
	Total Covered Employment	40,571	48,694	8,123	20.0%	100.0%	2,149	2,530	381	17.7%
	Total Government	11,272	12,976	1,704	15.1%	26.6%	117	150	33	28.2%
	Federal	347	337	(10)	-2.9%	0.7%	21	23	2	9.5%
	State	4,919	5,384	465	9.5%	11.1%	29	30	1	3.4%
	Local	6,006	7,255	1,249	20.8%	14.9%	67	97	30	44.8%
	Total Private	29,299	35,718	6,419	21.9%	73.4%	2,033	2,381	348	17.1%
	Goods Producing	8,415	10,208	1,793	21.3%	21.0%	396	439	43	10.9%
	Service Producing	20,884	25,510	4,626	22.2%	52.4%	1,637	1,942	305	18.6%
11	Agriculture, Forestry, Fishing and Hunting	293	319	26	8.9%	0.7%	20	17	(3)	-15.0%
21	Mining	51	67	16	31.4%	0.1%	3	3	-	0.0%
22	Utilities	165	156	(9)	-5.5%	0.3%	9	9	-	0.0%
23	Construction	2,069	2,406	337	16.3%	4.9%	266	296	30	11.3%
31-33	Manufacturing	6,003	7,416	1,413	23.5%	15.2%	108	123	15	13.9%
42	Wholesale Trade	763	1,085	322	42.2%	2.2%	74	93	19	25.7%
44-45	Retail Trade	5,702	5,788	86	1.5%	11.9%	390	427	37	9.5%
48-49	Transportation and Warehousing	630	1,653	1,023	162.4%	3.4%	54	60	6	11.1%
51	Information	467	541	74	15.8%	1.1%	30	38	8	26.7%
52	Finance and Insurance	878	913	35	4.0%	1.9%	98	139	41	41.8%
53	Real Estate and Rental and Leasing	637	648	11	1.7%	1.3%	109	109	-	0.0%
54	Professional, Scientific, and Technical Services	N	1,042	N	N	2.1%	N	188	N	N
55	Management of Companies and Enterprises	N	203	N	N	0.4%	N	10	N	N
56	Administrative and Support and Waste Management and Remediation	2,398	3,394	996	41.5%	7.0%	91	146	55	60.4%
61	Educational Services	206	265	59	28.6%	0.5%	16	23	7	43.8%
62	Health Care and Social Assistance	2,433	2,722	289	11.9%	5.6%	173	208	35	20.2%
71	Arts, Entertainment, and Recreation	474	602	128	27.0%	1.2%	18	17	(1)	-5.6%
72	Accommodation and Food Services	4,509	5,608	1,099	24.4%	11.5%	202	255	53	26.2%
81	Other Services (except Public Administration)	891	890	(1)	-0.1%	1.8%	215	223	8	3.7%

N - Data suppressed for confidentiality
 Source: US Bureau of Labor Statistics

Table 2 Covered Employment and Establishments 2001-2006

For service industries the largest gains were recorded in the Accommodation and Food Services (1,099 jobs) and Transportation and Warehousing (1,023 jobs). In the former, a majority of new jobs were concentrated in Food Services (953 jobs) as was the net increase in establishments (50 of 53). In the latter, the largest gains appear to have occurred in the general warehousing subsector although data suppression limits a conclusive determination of this fact. However, it is most likely reflective of the Wal-Mart and JoAnn Fabrics distribution centers in Opelika, which employ approximately 1,500 workers.

Other significant net job growth occurred in the sectors of Administrative and Support (996 jobs), Wholesale Trade (322 jobs), and Health Care (289 jobs). In contrast, the Retail sector, which represents the second largest percentage of total employment at 11.9%, experienced only marginal growth of 1.5%, or 86 jobs, over five years.



The remaining sectors generally experienced minimal growth in employment during this time period. However, with few exceptions, all of the major industry sectors listed in the table recorded positive growth over the last five years, which illustrates that Lee County has one of the strongest economic bases of all counties in the study area.

Recent Economic Activities

The following section provides an overview of major economic development activities in Lee County as well as the study area. These activities include recent and ongoing development initiatives as well as new and expanded business openings that have occurred since 2000. The second portion of the section highlights major plant closings and layoffs that took place in the region during the same time period.

Major Recent Economic Activities

Lee County has experienced considerable economic development activity in recent years. Although there have been some declining economic sectors and business closings, the number of new and expanding businesses have more than offset these losses. Some of the major recent and pending economic activities in and around the county include the following.

- Expansion/transformation of Fort Benning will increase permanent party military, federal civilian employees and contract employees by an estimated 8,200 through 2011. In addition, the total number of troops trained at the post on an annual basis is expected to increase by approximately 40,000.
- Construction of a new Kia automotive plant in Troup and Harris Counties will employ approximately 2,500 workers. Expected construction of eight supply plants throughout the region to support this facility may employ an additional 4,300 workers. Based on a recently completed impact analysis of the Kia facility, it was estimated that approximately 19,985 jobs (direct, indirect and induced) will be created in the area by 2013¹. Four of the study area counties were identified as recipients of this growth including Columbus-Muscogee (3,740 jobs), Lee (2,710 jobs), Russell (694 jobs), and Harris (368 jobs). The remaining 12,475 jobs were distributed between seven other counties in Alabama and Georgia with Troup County estimated to absorb roughly half (6,680 jobs).

¹ *Economic and Demographic Analysis of the Kia Automobile Plant on Chambers County, Alabama*, Final Report, Prepared for Industrial Development Authority of Chambers County, AL, Prepared by Bill Rial, Ph.D., August 13, 2007



- Creation of the TigerTown lifestyle center in Opelika, an 800,000 square foot retail facility that began construction in 2004, will employ approximately 3,000 at full buildout. In addition to its retail component, TigerTown includes office and hotel sites, as well as sites for freestanding banks and restaurants.
- The planned construction of Celebrate Alabama in Opelika, a mixed-use retail-tourism facility announced in 2008, will contain an exposition center, hotels, five-screen drive-in theater, outlet retail stores, entertainment venues and possibly, an aquarium. It is expected to employ approximately 5,000 at buildout
- Creation of a new city/university research park, City of Auburn and Auburn University. The first 100-acre phase is prepared for development with Northrup Grumman (software facility) committed to locating there.

In addition to these current and ongoing economic development activities, the following table summarizes other major new businesses that have opened in the county and adjoining areas since 2000. Information regarding total employment associated with new business openings was not available for Lee County. However, 41 major commercial and industrial facilities openings were identified between 2000 and 2007 in the Alabama portion of the study area, which were located primarily in the cities of Auburn and Opelika, as well as Phenix City in Russell County. The expansion of existing businesses is estimated to have added approximately 1,700 new jobs during this time period.

Table 2.1

Study Area	Firm	County	Established	Jobs	Firm	County	Established	Jobs
	Mobis (West Point)	Harris	2007	600	The Waggoners Trucking	Columbus-Muscogee	2004	365
	Xpress Materials	Harris	2007	100	Techsphere Systems International	Columbus-Muscogee	2004	250
	InterfaceFLOR	Harris	2007	50	RYDC	Columbus-Muscogee	2004	125
	IMS Inc	Harris	2007	20	Krispy Kreme	Columbus-Muscogee	2004	80
	AlaTrade Foods LLC (Phenix City)	Russell	2007	500	Columbus Gourmet	Columbus-Muscogee	2004	50
	Blaze Recycling (Phenix City)	Russell	2007	100	Heckler & Koch	Columbus-Muscogee	2003	200
	BP Metal Crafts	Taylor	2007	6	Hilton Garden Inn	Columbus-Muscogee	2003	40
	FedEx Ground	Columbus-Muscogee	2007	50	Residence Inn	Columbus-Muscogee	2003	30
	Sun Fresh Beverages	Columbus-Muscogee	2007	50	Fairfield Inn	Columbus-Muscogee	2003	25
	National Security Associates	Chattahoochee	2006	20	Callaway Blue Springs Water	Harris	2002	5
	Kia (West Point)	Harris/Troup	2006	2,893	Denim North America	Columbus-Muscogee	2002	300
	Apex Homes (Richland)	Stewart	2006	100	McCauley Propeller Systems	Columbus-Muscogee	2002	100
	C&S Metals (Manchester)	Talbot	2006	77	PTSI	Columbus-Muscogee	2002	50
	Jetaire	Taylor	2006	12	Daisaka	Columbus-Muscogee	2002	40
	PCI	Columbus-Muscogee	2006	100	Oglethorpe Power Corp	Talbot	2001	12
	Covan	Columbus-Muscogee	2006	60	Green Land Co. Inc.	Talbot	2001	7
	Dynaweld Trailers	Columbus-Muscogee	2006	50	Rich's	Columbus-Muscogee	2001	200
	Homewood Suites by Hilton	Columbus-Muscogee	2006	40	Johnston Mill Lofts	Columbus-Muscogee	2001	50
	Road America	Columbus-Muscogee	2005	300	Anderson Columbia	Talbot	2000	50
	American Consumer Products Corp	Columbus-Muscogee	2005	250	Svedala	Talbot	2000	25
	ICForm, Inc.	Columbus-Muscogee	2005	100	American Colloid Co	Taylor	2000	10
	Lightning Distributors	Columbus-Muscogee	2005	50	Ben Carter Properties	Columbus-Muscogee	2000	1,000
	Oak Crest lumber, Inc.	Marion	2004	40				

Source: The Valley Partnership

Table 2.1 Major Business Openings 2000-2007



In the Georgia portion of the study area, approximately 9,000 jobs have been created through new business openings (85 in total) over the past seven years. Of that total, approximately 4,470 were located in Columbus-Muscogee County. In addition, another 5,140 jobs were created through expansion of existing businesses, most of which were also located in the county.

Major Closings/Layoffs

Counterbalancing the economic expansion and initiatives noted in the previous section are significant plant closures and layoffs that have impacted area businesses over the last half decade. These major events are tracked by the states' Department of Labor by means of the Worker Adjustment and Retraining Notification Act (WARN) that was enacted by the United States Congress on August 4, 1988, and became effective on February 4, 1989. WARN was established to offer protection to workers, their families, and communities by requiring employers to provide notice 60 days in advance of covered plant closings and covered mass layoffs. This notice must be provided to either affected workers or their representatives (e.g., a labor union); to the state dislocated worker unit; and to the appropriate unit of local government. The listings included in this data primarily reflect events that affected more than 50 employees.

The following is a listing of all major plant closings and layoffs that have been recorded in the study area since 2000. In total, approximately 13,350 jobs were displaced during this time due to a total of 58 closing or major layoff events. Roughly 33% (4,482) of these losses occurred in the Alabama portion of the study area, approximately 1,600 of which were located in Lee County.



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Company Name	County	Est. Number Affected	Year	Action	Company Name	County	Est. Number Affected	Year	Action
Internet/Columbus Foundry	Columbus-Muscogee	83	2007	L	Dixon Lumber Company	Barbour	140	2008	L
Berry Plastics Corporation	Columbus-Muscogee	36	2007	C	Briggs and Stratton Corp.	Lee	90	2007	L
Belk Store # 618 (Parisian)	Columbus-Muscogee	110	2006	C	ATS Wheels	Lee	75	2007	L
Swift Galey Midland/Sixth Avenue	Columbus-Muscogee	800	2006	C	Wellstone Mills-Plant 1	Barbour	125	2007	C
Frontier Spinning Mills, Llc.	Columbus-Muscogee	215	2006	C	Cain and Forshee Trucking, LLC	Barbour	30	2007	C
Charbroil	Columbus-Muscogee	950	2006	L	Wellstone Mills-Plant 2	Barbour	117	2007	C
Well Point A.K.A. Blue Cross Blue Shield Of Georgia, Inc.	Columbus-Muscogee	52	2005	C	WestPoint Home-GriffTex Chemical Plant	Lee	13	2007	C
Meritas Yarns	Columbus-Muscogee	44	2005	C	WestPoint Home-Opelika Finishing Plant	Lee	350	2007	C
Usa Labs, Inc	Columbus-Muscogee	41	2005	C	Alatech Healthcare Products	Barbour	50	2006	L
Swift Denim	Columbus-Muscogee	200	2005	L	Char-Broil	Lee	74	2006	C
Internet Columbus Machining	Columbus-Muscogee	87	2004	C	BF Goodrich Tire Mfg., Opelika	Lee	388	2006	L
Lear Siegler Services, Inc	Columbus-Muscogee	250	2004	L	WestPoint Home-Opelika	Lee	325	2006	C
Cagle's, Inc.	Harris	622	2003	L	Johns Manville Company	Russell	150	2006	C
Lear Siegler Services, Inc	Columbus-Muscogee	99	2002	L	Johnston Textiles, Inc.	Russell	170	2005	L
Pillowtex Corporation	Columbus-Muscogee	161	2002	C	The Bridge, Inc., Eufaula Youth Center	Barbour	91	2005	C
Exide Technologies	Columbus-Muscogee	67	2002	C	Food Fair #149	Barbour	28	2004	C
Marubeni Denim Plant	Columbus-Muscogee	346	2001	C	Quantegy, Inc.	Lee	167	2004	L
Swift Spinning Mills, Inc.	Columbus-Muscogee	212	2001	C	Encompass Group (Dowling Manufacturing)	Barbour	91	2004	C
Cub Foods Super Discount Markets	Columbus-Muscogee	59	2001	C	Fiskars' Home Leisure (American Designer Pottery)	Lee	76	2003	C
Cub Foods Super Discount Markets	Columbus-Muscogee	55	2001	C	Pillowtex Corporation	Russell	216	2003	C
Pillowtex Corporation	Columbus-Muscogee	192	2001	L	Charoen Pokphand (USA), Inc.	Barbour	15	2003	C
Montgomery Ward & Co, Inc.	Columbus-Muscogee	155	2001	C	Pillowtex Corporation	Russell	818	2002	L
Matsushita Battery Industrial Corp	Columbus-Muscogee	351	2001	C	First Corrections Corporation	Barbour	87	2002	C
Beaulieu Of America, Inc.	Columbus-Muscogee	415	2000	C	TNS Mills, Inc.	Barbour	132	2001	C
Johnston Industries, Inc.	Columbus-Muscogee	375	2000	C	Opelika Foundry Company	Lee	71	2001	C
Dolly Madison Bakery	Columbus-Muscogee	63	2000	L	Johnston Industries, Inc.	Russell	175	2001	L
Precision Components International	Columbus-Muscogee	54	2000	L	Pillowtex Corporation	Russell	56	2001	C
New Horizons Community Service Bd	Columbus-Muscogee	130	2000	L	Promoverks, Inc.	Russell	15	2001	C
Total		8,867			Beaulieu-Columbus Mills	Russell	122	2000	C
Total					Louisiana- Pacific Corporation	Barbour	225	2000	C
Total					Total		4,482		

C = Closure, L = Layoff
Source: GA Dept. of Labor

Table 2.2 Major Plant Closings and Layoffs 2000-2007

Wages

Table 3 presents a summary of average annual wages by major employment category for Lee County and the study area between 1996 and 2006. The county's total annual wages of \$30,468 were slightly below the study area's as a whole where total annual wages as of 2006 were \$31,418. This comparison however, does not hold true for all government and private sector categories illustrated in the table. In fact, Lee County's wages exceed the study area's in all categories with the exception of the service producing sectors where the average salary of \$22,320 was considerably lower than the \$28,267 average for the region. Lower service wages may reflect the availability of a large college student population in the labor force.

The county's total covered employment wages increased at a somewhat slower rate over ten years than the study area's, with respective increases of 38.4% and 40.5%. However, over the last five years (2001-2006) an 18.3% growth in county wages outpaced the study area's 15.5% growth rate, suggesting that businesses in the county have become somewhat more competitive with regional employers. In particular, wages in the county's service producing sectors narrowed the wage gap with an increase of 18.7% in comparison to the study area's 14.2% increase.



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Industry	Avg Annual Wages			Change			Percent Change		
	1996	2001	2006	96-01	01-06	96-06	96-01	01-06	96-06
Total Covered Employment	\$ 22,019	\$ 25,753	\$ 30,468	\$ 3,734	\$ 4,715	\$ 8,449	17.0%	18.3%	38.4%
Total Government	\$ 27,092	\$ 34,576	\$ 40,622	\$ 7,484	\$ 6,045	\$ 13,529	27.6%	17.5%	49.9%
Federal	\$ 37,995	\$ 43,262	\$ 54,214	\$ 5,267	\$ 10,952	\$ 16,219	13.9%	25.3%	42.7%
State	\$ 29,999	\$ 42,089	\$ 50,643	\$ 12,090	\$ 8,554	\$ 20,644	40.3%	20.3%	68.8%
Local	\$ 23,285	\$ 27,925	\$ 32,551	\$ 4,640	\$ 4,626	\$ 9,266	19.9%	16.6%	39.8%
Total Private	\$ 20,098	\$ 22,358	\$ 26,779	\$ 2,260	\$ 4,421	\$ 6,681	11.2%	19.8%	33.2%
Goods Producing	\$ 26,846	\$ 31,176	\$ 37,923	\$ 4,330	\$ 6,747	\$ 11,077	16.1%	21.6%	41.3%
Service Producing	\$ 16,261	\$ 18,805	\$ 22,320	\$ 2,544	\$ 3,515	\$ 6,059	15.6%	18.7%	37.3%

Study Area

Industry	Avg Annual Wages			Change			Percent Change		
	1996	2001	2006	96-01	01-06	96-06	96-01	01-06	96-06
Total Covered Employment	\$ 22,363	\$ 27,191	\$ 31,418	\$ 4,828	\$ 4,227	\$ 9,054	21.6%	15.5%	40.5%
Total Government	\$ 24,165	\$ 30,194	\$ 35,340	\$ 6,029	\$ 5,146	\$ 11,175	24.9%	17.0%	46.2%
Federal	\$ 26,538	\$ 33,124	\$ 42,911	\$ 6,586	\$ 9,787	\$ 16,374	24.8%	29.5%	61.7%
State	\$ 27,503	\$ 35,402	\$ 41,614	\$ 7,898	\$ 6,213	\$ 14,111	28.7%	17.5%	51.3%
Local	\$ 21,720	\$ 27,008	\$ 30,515	\$ 5,287	\$ 3,507	\$ 8,795	24.3%	13.0%	40.5%
Total Private	\$ 21,893	\$ 26,401	\$ 30,382	\$ 4,508	\$ 3,981	\$ 8,489	20.6%	15.1%	38.8%
Goods Producing	\$ 26,515	\$ 30,442	\$ 36,957	\$ 3,927	\$ 6,515	\$ 10,442	14.8%	21.4%	39.4%
Service Producing	\$ 19,684	\$ 24,755	\$ 28,267	\$ 5,070	\$ 3,512	\$ 8,583	25.8%	14.2%	43.6%

Source: US Bureau of Labor Statistics

Table 3 Covered Employment Average Annual Wages 1996-2006

Table 4 presents a more detailed examination of Lee County's average weekly wages and total wages by major industry sectors. Overall, total wages for the county as of 2006 were approximately \$1.4 billion, an increase of 42% from 2001 levels. The Manufacturing sector exceeded all other sectors by a large margin with a percentage of total wages at 19.9% as of 2006, with an increase of over \$95 million (19.9%) in five years. This was followed by Retail sector wages, which accounted for less than half the value of Manufacturing wages at 8.1% despite an increase of more than \$16 million. The Health Care sector represents the third largest portion of the county's wage base at 6.1%, with over \$89 million in total wages as of 2006.

The county's largest increase in total wages, aside from Manufacturing, occurred in the Transportation and Warehousing sector, which added over \$33 million in total wage value in five years. As noted in a previous section, this sector also experienced substantial employment growth of over 1,000 jobs during this time. However, the relatively modest increase in weekly wages of 9.1% (\$555 to \$605) indicates that these were lower paying positions. Similarly, wages in the Accommodation and Food Services sector increased by 52%, adding over \$20 million in value and almost 1,100 jobs, but average wages remain the lowest at \$202 per week.



Fort Benning Regional Growth Management Plan

NAICS	Industry	Avg Weekly Wages				Total Wages				
		2001	2006	Change	% Change	2001	2006	Change	% Change	% Total 06
	Total Covered Employment	\$ 495	\$ 596	\$ 91	18.3%	\$ 1,044,822,909	\$ 1,483,604,911	\$ 438,782,002	42.0%	100.0%
	Total Government	\$ 671	\$ 776	\$ 106	15.8%	\$ 393,009,848	\$ 523,841,202	\$ 130,831,354	33.3%	35.3%
	Federal	\$ 1,012	\$ 856	\$ (156)	-15.4%	\$ 18,265,609	\$ 15,001,158	\$ (3,264,451)	-17.9%	1.0%
	State	\$ 809	\$ 974	\$ 165	20.3%	\$ 207,034,221	\$ 272,672,212	\$ 65,637,991	31.7%	18.4%
	Local	\$ 537	\$ 626	\$ 89	16.6%	\$ 167,710,018	\$ 236,167,832	\$ 68,457,814	40.8%	15.9%
	Total Private	\$ 430	\$ 515	\$ 85	19.8%	\$ 655,077,512	\$ 956,499,258	\$ 301,421,746	46.0%	64.5%
	Goods Producing	\$ 600	\$ 729	\$ 130	21.6%	\$ 262,346,233	\$ 387,113,229	\$ 124,766,996	47.6%	26.1%
	Service Producing	\$ 362	\$ 429	\$ 68	18.7%	\$ 392,731,279	\$ 569,386,029	\$ 176,654,750	45.0%	38.4%
11	Agriculture, Forestry, Fishing and Hunting	\$ 610	\$ 718	\$ 108	17.7%	\$ 9,296,667	\$ 11,908,872	\$ 2,612,205	28.1%	0.8%
21	Mining	\$ 707	\$ 893	\$ 186	26.3%	\$ 1,873,846	\$ 3,109,612	\$ 1,235,766	65.9%	0.2%
22	Utilities	\$ 1,006	\$ 1,129	\$ 123	12.3%	\$ 8,627,245	\$ 9,156,236	\$ 528,991	6.1%	0.6%
23	Construction	\$ 484	\$ 618	\$ 134	27.7%	\$ 52,069,447	\$ 77,339,762	\$ 25,270,315	48.5%	5.2%
31-33	Manufacturing	\$ 638	\$ 764	\$ 127	19.8%	\$ 199,106,273	\$ 294,754,983	\$ 95,648,710	48.0%	19.9%
42	Wholesale Trade	\$ 553	\$ 728	\$ 175	31.6%	\$ 21,958,821	\$ 41,101,883	\$ 19,143,062	87.2%	2.8%
44-45	Retail Trade	\$ 348	\$ 398	\$ 50	14.4%	\$ 103,037,054	\$ 119,675,854	\$ 16,638,800	16.1%	8.1%
48-49	Transportation and Warehousing	\$ 555	\$ 605	\$ 51	9.1%	\$ 18,167,603	\$ 52,026,464	\$ 33,858,861	186.4%	3.5%
51	Information	\$ 554	\$ 622	\$ 68	12.2%	\$ 13,453,062	\$ 17,493,769	\$ 4,040,707	30.0%	1.2%
52	Finance and Insurance	\$ 633	\$ 836	\$ 203	32.1%	\$ 28,884,545	\$ 39,670,943	\$ 10,786,398	37.3%	2.7%
53	Real Estate and Rental and Leasing	\$ 358	\$ 476	\$ 118	33.0%	\$ 11,853,206	\$ 16,038,098	\$ 4,184,892	35.3%	1.1%
54	Professional, Scientific, and Technical Services	N	\$ 615	N	N	N	\$ 33,314,525	N	N	2.2%
55	Management of Companies and Enterprises	N	\$ 593	N	N	N	\$ 6,261,819	N	N	0.4%
56	Administrative and Support and Waste Management and Remediation Services	\$ 293	\$ 315	\$ 23	7.7%	\$ 36,496,071	\$ 55,641,165	\$ 19,145,094	52.5%	3.8%
61	Educational Services	\$ 390	\$ 427	\$ 37	9.4%	\$ 4,178,431	\$ 5,881,866	\$ 1,703,435	40.8%	0.4%
62	Health Care and Social Assistance	\$ 562	\$ 635	\$ 73	13.0%	\$ 71,045,331	\$ 89,817,299	\$ 18,771,968	26.4%	6.1%
71	Arts, Entertainment, and Recreation	\$ 201	\$ 237	\$ 36	17.6%	\$ 4,962,547	\$ 7,414,850	\$ 2,452,303	49.4%	0.5%
72	Accommodation and Food Services	\$ 165	\$ 202	\$ 37	22.3%	\$ 38,756,473	\$ 58,976,025	\$ 20,219,552	52.2%	4.0%
81	Other Services (except Public Administration)	\$ 306	\$ 365	\$ 59	19.3%	\$ 14,198,309	\$ 16,915,233	\$ 2,716,924	19.1%	1.1%

N - Data suppressed for confidentiality
Source: US Bureau of Labor Statistics

Table 4 Covered Employment Average Weekly and Total Annual Wages 2001-2006

Labor Force Characteristics

Labor Force and Unemployment Rates

Table 5 and Figure 1 illustrate changes in the labor force and unemployment rates for Lee County, the study area, and the States of Alabama and Georgia over the last ten years. Increases in the county's labor force between 1997 and 2007 have been substantial compared to the state and the region, with a moderate slowing over the second half of the decade. Overall, the labor force increased by over 32% over ten years as compared to only 8.2% for the study area and 2.5% for the State of Alabama. Given that the county's total employment base increased by approximately 8,120 in comparison to a labor force increase of over 16,000, it suggests that there is a significant amount of labor capacity available in the local economy. However, this disparity is more likely attributable to the large number of college students and proprietor employment that exists within the county that would not be reflected in the covered employment data.



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Lee County, Study Area, Georgia and Alabama

		1997	2002	2007	Change 97-07		Avg. Annual Rate		
					Number	Percent	97-02	02-07	97-07
Lee County	Labor Force	49,614	59,331	65,835	16,221	32.7%	3.6%	2.1%	2.9%
	Employment	47,950	56,863	63,741	15,791	32.9%	3.5%	2.3%	2.9%
	Unemployment	1,664	2,468	2,094	430	25.8%	8.2%	-3.2%	2.3%
	Rate	3.4	4.2	3.2	(0.2)	-5.9%	4.3%	-5.3%	-0.6%
Study Area	Labor Force	197,402	202,191	213,679	16,277	8.2%	0.5%	1.1%	0.8%
	Employment	188,352	191,842	203,810	15,458	8.2%	0.4%	1.2%	0.8%
	Unemployment	9,050	10,349	9,869	819	9.0%	2.7%	-0.9%	0.9%
	Rate	4.6	5.1	4.6	0.0	0.7%	2.2%	-2.0%	0.1%
Georgia	Labor Force	3,926,801	4,345,402	4,814,831	888,030	22.6%	2.0%	2.1%	2.1%
	Employment	3,751,699	4,135,381	4,602,947	851,248	22.7%	2.0%	2.2%	2.1%
	Unemployment	175,102	210,021	211,884	36,782	21.0%	3.7%	0.2%	1.9%
	Rate	4.5	4.8	4.4	(0.1)	-2.2%	1.3%	-1.7%	-0.2%
Alabama	Labor Force	2,129,797	2,107,858	2,182,779	52,982	2.5%	-0.2%	0.7%	0.2%
	Employment	2,035,156	1,994,748	2,105,951	70,795	3.5%	-0.4%	1.1%	0.3%
	Unemployment	94,641	113,110	76,828	(17,813)	-18.8%	3.6%	-7.4%	-2.1%
	Rate	4.4	5.4	3.5	(0.9)	-20.5%	4.2%	-8.3%	-2.3%

Source: US Bureau of Labor Statistics

Table 5 Average Annual Labor Force and Unemployment Rates 1997-2007

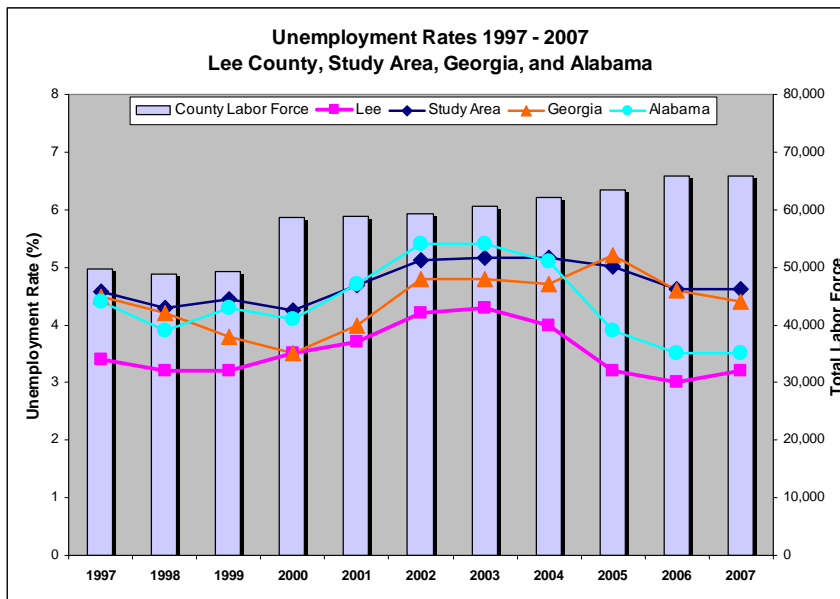


Figure 1 - Unemployment Rates 1997 - 2007

Lee County's unemployment rate has tended to trend somewhat lower than the region and the state throughout the course of the decade. As of 2007, the county's 3.2% unemployment rate was well below the study area's 4.6%, but comparable with the State of Alabama's 3.5% rate, which has declined considerably since 2002. The county's low unemployment rate effectively represents almost full employment, although approximately 2,100 residents were reported as unemployed.



Another potential supply of labor is reflected in the area's labor force participation rate (LFPR). The LFPR represents the proportion of the civilian noninstitutionalized population between the ages of 16 and 65 that is in the labor force. In other words, it is an indication of how many residents of working age who are actually participating in the workforce and as such, identifies a potential pool of additional workers. (Note: Some prefer to use a wider age group, such as 16 and older, to calculate the LFPR. The method employed here is considered to offer a more conservative estimate of potential available labor). The county's current (2006) LFPR is estimated at approximately 74% indicating that over 23,000 residents of working age are not actively participating in the workforce. This is a relatively low LFPR compared to all counties within the study area, which had an average LFPR of 76.4% as a whole. (Note: Based on the age 16 and older methodology the LFPR is 65.7% for the county, 64% for the study area, 61.3% for Alabama). Residents not participating in the workforce may be students, stay-at-home parents, disabled individuals, or people who are no longer seeking paying work. In fact, census estimates from 2000 suggest that the county had over 12,600 residents enrolled in college and another 8,600 who indicated that a disability affected their ability to work to some degree. Additional efforts to move these people into the workforce could have a significant effect on the labor supply; however, college students generally represent only a temporary or seasonal source of labor that are most likely to fill service positions.

Occupational Characteristics

Table 6 illustrates occupational characteristics of Lee County's population as of 2000, with comparisons to the study area and States of Georgia and Alabama. No more recent data is available at the county level than this information, which was gathered by the U.S. Census Bureau. From an overall perspective, the majority of the county's residents were employed in Sales and office occupations with 25.8%, a percentage that was relatively typical for the study area as a whole, as well as both states. Lee County surpassed these other areas, however, in the Professional and related occupations where 22.8% or residents were employed while the region and states had less than 19% in these types of positions. For the county, the largest amount of professional employment was related to the education and health care fields.



Fort Benning Regional Growth Management Plan

Lee County, Study Area, Alabama, and Georgia

	Lee	% Total	Study Area	% Total	Alabama	% Total	Georgia	% Total
Management, business, and financial operations occupations:	5,875	11.1%	20,581	11.2%	211,869	11.0%	538,647	14.0%
Management occupations, except farmers and farm managers	4,118	7.8%	13,691	7.5%	137,325	7.2%	352,376	9.2%
Farmers and farm managers	117	0.2%	574	0.3%	10,034	0.5%	14,993	0.4%
Business and financial operations occupations:	1,640	3.1%	6,316	3.4%	64,510	3.4%	171,278	4.5%
Business operations specialists	849	1.6%	3,289	1.8%	30,368	1.6%	85,103	2.2%
Financial specialists	791	1.5%	3,027	1.7%	34,142	1.8%	86,175	2.2%
Professional and related occupations:	12,067	22.8%	34,329	18.7%	354,456	18.5%	717,312	18.7%
Computer and mathematical occupations	906	1.7%	3,129	1.7%	31,697	1.7%	97,842	2.5%
Architecture and engineering occupations:	977	1.8%	2,267	1.2%	39,800	2.1%	67,153	1.7%
Architects, surveyors, cartographers, and engineers	597	1.1%	1,292	0.7%	27,719	1.4%	47,084	1.2%
Drafters, engineering, and mapping technicians	380	0.7%	975	0.5%	12,081	0.6%	20,069	0.5%
Life, physical, and social science occupations	875	1.7%	1,691	0.9%	13,545	0.7%	29,195	0.8%
Community and social services occupations	774	1.5%	2,566	1.4%	27,786	1.4%	51,942	1.4%
Legal occupations	229	0.4%	904	0.5%	15,401	0.8%	34,933	0.9%
Education, training, and library occupations	4,871	9.2%	12,599	6.9%	106,077	5.5%	213,802	5.6%
Arts, design, entertainment, sports, and media occupations	813	1.5%	2,473	1.3%	24,361	1.3%	63,433	1.7%
Healthcare practitioners and technical occupations:	2,622	4.9%	8,700	4.7%	95,789	5.0%	159,012	4.1%
Health diagnosing and treating practitioners and tech. occup.	1,480	2.8%	5,370	2.9%	61,584	3.2%	107,125	2.8%
Health technologists and technicians	1,142	2.2%	3,330	1.8%	34,205	1.8%	51,887	1.4%
Service occupations:	8,046	15.2%	28,479	15.5%	259,106	13.5%	514,241	13.4%
Healthcare support occupations	785	1.5%	3,355	1.8%	34,991	1.8%	57,540	1.5%
Protective service occupations:	899	1.7%	3,710	2.0%	35,456	1.8%	74,959	2.0%
Fire fighting, prevention, and law enforcement workers	588	1.1%	2,577	1.4%	22,245	1.2%	50,111	1.3%
Other protective service workers, including supervisors	311	0.6%	1,133	0.6%	13,211	0.7%	24,848	0.6%
Food preparation and serving related occupations	3,072	5.8%	9,905	5.4%	79,495	4.1%	168,458	4.4%
Building and grounds cleaning and maintenance occupations	1,903	3.6%	6,621	3.6%	64,203	3.3%	118,926	3.1%
Personal care and service occupations	1,387	2.6%	4,887	2.7%	44,961	2.3%	94,358	2.5%
Sales and office occupations:	13,654	25.8%	46,959	25.6%	497,262	25.9%	1,028,240	26.8%
Sales and related occupations	5,916	11.2%	19,559	10.7%	219,893	11.5%	446,876	11.6%
Office and administrative support occupations	7,738	14.6%	27,400	14.9%	277,369	14.4%	581,364	15.1%
Farming, fishing, and forestry occupations	308	0.6%	1,121	0.6%	14,855	0.8%	24,489	0.6%
Construction, extraction, and maintenance occupations:	4,849	9.2%	18,492	10.1%	217,200	11.3%	415,849	10.8%
Construction and extraction occupations:	2,535	4.8%	10,154	5.5%	122,667	6.4%	245,280	6.4%
Supervisors, construction and extraction workers	435	0.8%	1,357	0.7%	15,113	0.8%	32,715	0.9%
Construction trades workers	2,087	3.9%	8,715	4.8%	104,989	5.5%	210,589	5.5%
Extraction workers	13	0.0%	81	0.0%	2,565	0.1%	1,976	0.1%
Installation, maintenance, and repair occupations	2,314	4.4%	8,338	4.5%	94,533	4.9%	170,569	4.4%
Production, transportation, and material moving occupations:	8,181	15.4%	33,403	18.2%	365,441	19.0%	600,978	15.7%
Production occupations	5,383	10.2%	21,428	11.7%	225,581	11.7%	346,326	9.0%
Transportation and material moving occupations:	2,798	5.3%	11,975	6.5%	139,860	7.3%	254,652	6.6%
Supervisors, transportation and material moving workers	70	0.1%	342	0.2%	3,516	0.2%	7,847	0.2%
Aircraft and traffic control occupations	57	0.1%	195	0.1%	1,609	0.1%	7,108	0.2%
Motor vehicle operators	1,375	2.6%	5,714	3.1%	67,971	3.5%	120,439	3.1%
Rail, water and other transportation occupations	149	0.3%	460	0.3%	7,158	0.4%	9,240	0.2%
Material moving workers	1,147	2.2%	5,263	2.9%	59,606	3.1%	110,018	2.9%
Total:	52,980	100.0%	183,365	100.0%	1,920,189	100.0%	3,839,756	100.0%

Source: US Census Bureau

Table 6 Occupation for Employed Civilian Population, 16 Years and Over – 2000

Surprisingly, Lee County lagged behind the region and state in the numbers employed in Production, transportation, and material moving occupations with only 15.4% compared to over 18% in other locations. However, given that this data is from 2000, it is likely that the county has drawn closer to these higher percentages given the large increases in manufacturing and transportation/warehousing sectors over the first part of this decade, as discussed previously in this chapter.



Commuting Patterns

Commuting patterns are helpful in indentifying economic linkages between various locations that illustrate the flow of workers between home and work, travel patterns, accessibility, and to some extent, residential preferences. Data compiled by the U.S. Census Bureau regarding commuting patterns is presented in Table 7. For Lee County this data illustrates both where county residents work, as well as where employees who work in the county reside.

The first portion of Table 7 shows that the vast majority, over 68%, of Lee County residents commute to work within the county. This is the highest percentage for all study area counties and highlights the county’s role as a regional employment center. The second largest destination receiving the county’s commuters is Columbus-Muscogee County (14.6%) which is actually the largest employment center in the region in terms of total jobs located there. Russell and Chambers Counties also draw a significant number of commuters, approximately 2,680 and 1,540 respectively, although they account for a relatively small percentage of the county’s total commuters. Interestingly, Cusseta-Chattahoochee County attracted almost 670 commuters who are very likely associated to some degree with jobs associated with Fort Benning.

As of 2000, over 43,600 people commuted to jobs in Lee County. The vast majority, over 81%, of these commuters are also residents of the county. Roughly 8,000 additional workers commute to jobs in Lee County with most coming from other locations in Alabama including Chambers, Tallapoosa, and Russell Counties. Relatively few commuters are apparently drawn from the State of Georgia, according to census data.

Employed Residents of Lee County			Persons Working in Lee County		
Place of Work	Number	% Total	Place of Residence	Number	% Total
Lee Co. AL	35,549	68.2%	Lee Co. AL	35,549	81.4%
Columbus-Muscogee Co. GA	7,597	14.6%	Chambers Co. AL	1,907	4.4%
Russell Co. AL	2,682	5.1%	Macon Co. AL	1,789	4.1%
Chambers Co. AL	1,536	2.9%	Tallapoosa Co. AL	1,339	3.1%
Troup Co. GA	790	1.5%	Russell Co. AL	1,048	2.4%
Cusseta-Chattahoochee Co. GA	668	1.3%	Columbus-Muscogee Co. GA	514	1.2%
Montgomery Co. AL	632	1.2%	Montgomery Co. AL	213	0.5%
Macon Co. AL	478	0.9%	Elmore Co. AL	170	0.4%
Tallapoosa Co. AL	272	0.5%	Troup Co. GA	107	0.2%
Fulton Co. GA	150	0.3%	Harris Co. GA	67	0.2%
Other	1,765	3.4%	Other	963	2.2%
Total Residents:	52,119	100.0%	Total Residents:	43,666	100.0%

Source: US Census

Table 7 Commuting Patterns 2000

