Roanoke valley – Alleghany Regional Overview

Beth Doughty, Roanoke Regional Partnership
Wayne Strickland, Roanoke-Valley Alleghany Regional Commission
Jake Gilmer, Virginia’s Blue Ridge Works

July 25, 2017
Today’s Program

- Regional Profile
- Workforce
- Innovation
- Strengths
- Weaknesses
- Opportunities
Regional Profile

Wayne Strickland, Roanoke Valley-Alleghany Regional Commission
Population By Age (2016 population estimate for the region is 335,167)

Source: 2010 U.S. Census Bureau
Migration Patterns

Population Change (2010-2015)

<table>
<thead>
<tr>
<th>POPULATION CHANGE</th>
<th>NATURAL POPULATION CHANGE</th>
<th>NET MIGRATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,878</td>
<td>-73</td>
<td>5,624</td>
</tr>
</tbody>
</table>


Source: OnTheMap.ces.census.gov
## Population Projections

<table>
<thead>
<tr>
<th>Geography Name</th>
<th>Total Population</th>
<th>Projected Change 2025-2045</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2025</td>
<td>2035</td>
</tr>
<tr>
<td>Virginia, Statewide</td>
<td>9,145,616</td>
<td>9,874,244</td>
</tr>
<tr>
<td>Alleghany County</td>
<td>14,237</td>
<td>12,927</td>
</tr>
<tr>
<td>Botetourt County</td>
<td>34,604</td>
<td>36,086</td>
</tr>
<tr>
<td>Craig County</td>
<td>5,200</td>
<td>5,194</td>
</tr>
<tr>
<td>Franklin County</td>
<td>59,274</td>
<td>64,410</td>
</tr>
<tr>
<td>Roanoke County</td>
<td>97,199</td>
<td>101,099</td>
</tr>
<tr>
<td>Covington city</td>
<td>6,352</td>
<td>6,195</td>
</tr>
<tr>
<td>Roanoke city</td>
<td>103,175</td>
<td>104,878</td>
</tr>
<tr>
<td>Salem city</td>
<td>26,117</td>
<td>26,210</td>
</tr>
<tr>
<td>RVARC REGION</td>
<td>346,157</td>
<td>357,000</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau & Weldon Cooper Center
Commuting Patterns

- Live & Work in Region: 109,949
- Out-Commuters: 34,936
- In-Commuters: 56,985
- Net In-Commuters: 22,049

Educational Attainment

18 & older

Source: U.S. Census Bureau, 2015 American Community Survey
Employment By Industry Sector

Source: Virginia Employment Commission, July 2017
Average Weekly Wage

Source: Virginia Employment Commission, July 2017
Workforce

Jake Gilmer, Virginia’s Blue Ridge Works
Unemployment Trends

Source: Virginia Employment Commission
Labor Force Participation Rate

- Virginia: 64.70%
- LWDA III: 61.20%
- Alleghany County: 51.80%
- Botetourt County: 62.70%
- Covington City: 50.20%
- Craig County: 53.50%
- Franklin County: 57.60%
- Roanoke City: 62.40%
- Roanoke County: 63.80%
- Salem City: 62.70%
Advertised Jobs by Industry Sector

Source: Virginia Employment Commission, July 2017
## Workforce Training Target Industry Sectors

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Existing Target Industries</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td>21,364</td>
<td>2,280</td>
<td>11%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>17,960</td>
<td>(720)</td>
<td>(4%)</td>
</tr>
<tr>
<td>Construction</td>
<td>11,933</td>
<td>343</td>
<td>3%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>7,261</td>
<td>296</td>
<td>4%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>717</td>
<td>720</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Emerging Target Industries</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and Beverage Manuf.</td>
<td>1,214</td>
<td>37</td>
<td>3%</td>
</tr>
<tr>
<td>Life Sciences</td>
<td>17,968</td>
<td>1,875</td>
<td>10%</td>
</tr>
<tr>
<td>IT</td>
<td>4,424</td>
<td>268</td>
<td>6%</td>
</tr>
</tbody>
</table>
# In-Demand Health Care Occupations and Skills

<table>
<thead>
<tr>
<th>Description</th>
<th>2016 Jobs</th>
<th>2016 - 2021 Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Care Aides</td>
<td>1,917</td>
<td>365</td>
<td>$10.86</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>4,316</td>
<td>359</td>
<td>$29.20</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>870</td>
<td>217</td>
<td>$10.64</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>2,724</td>
<td>147</td>
<td>$12.39</td>
</tr>
<tr>
<td>Massage Therapists</td>
<td>383</td>
<td>87</td>
<td>$14.35</td>
</tr>
<tr>
<td>Licensed Practical and Licensed Vocational Nurses</td>
<td>1,412</td>
<td>58</td>
<td>$19.29</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>294</td>
<td>51</td>
<td>$40.52</td>
</tr>
<tr>
<td>Mental Health and Substance Abuse Social Workers</td>
<td>449</td>
<td>46</td>
<td>$19.35</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>246</td>
<td>41</td>
<td>$16.52</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>520</td>
<td>40</td>
<td>$14.78</td>
</tr>
</tbody>
</table>
## In-Demand Manufacturing Occupations and Skills

<table>
<thead>
<tr>
<th>Description</th>
<th>2016 Jobs</th>
<th>2016 - 2021 Change</th>
<th>Avg. Hourly Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers, All Other</td>
<td>1,384</td>
<td>66</td>
<td>$19.46</td>
</tr>
<tr>
<td>Industrial Machinery Mechanics</td>
<td>542</td>
<td>44</td>
<td>$21.02</td>
</tr>
<tr>
<td>Computer-Controlled Machine Tool Operators, Metal and Plastic</td>
<td>145</td>
<td>10</td>
<td>$18.03</td>
</tr>
<tr>
<td>Bakers</td>
<td>141</td>
<td>14</td>
<td>$11.84</td>
</tr>
<tr>
<td>Welders, Cutters, Solderers &amp; Brazers</td>
<td>566</td>
<td>13</td>
<td>$18.16</td>
</tr>
<tr>
<td>Chief Executives</td>
<td>465</td>
<td>43</td>
<td>$47.40</td>
</tr>
<tr>
<td>Machinists</td>
<td>532</td>
<td>12</td>
<td>$20.31</td>
</tr>
<tr>
<td>Structural Metal Fabricators and Fitters</td>
<td>154</td>
<td>6</td>
<td>$19.59</td>
</tr>
<tr>
<td>Cabinetmakers and Bench Carpenters</td>
<td>256</td>
<td>4</td>
<td>$16.71</td>
</tr>
<tr>
<td>Woodworkers, Other</td>
<td>41</td>
<td>3</td>
<td>$14.81</td>
</tr>
</tbody>
</table>
Workforce Initiatives in the Region
Rebranding & Focus on Businesses

Businesses
Welcome to Virginia’s Blue Ridge Works, your comprehensive source for workforce resources in the Roanoke Valley and Alleghany Highlands. On this site, you will find online resources to help your company recruit, train, and retain the ideal workforce. You will also find a description of services that are available to you at one of our Virginia’s Blue Ridge Works Centers.

Find a Candidate -
I want to find dependable, qualified employees.

Training Incentives -
I want incentives to train existing, new and/or potential employees.

Hiring Incentives -
I want incentives or tax credits for hiring new employees.
Workforce Initiatives in the Region

New Roanoke Comprehensive Workforce Center
Innovation

Beth Doughty, Roanoke Regional Partnership
Innovation Initiatives in the Region

Roanoke Innovation Corridor

Innovation Fund

Alleghany Highlands Drone Zone
Successful Start-Up Companies

- Luna Innovations
- ADMMicro ➔ GridPoint
- Meridium ➔ GE Digital
- Optical Cable
- Synchrony ➔ Dresser Rand
- Interactive Achievement ➔ PowerSchool
## STEM-H Outcomes

<table>
<thead>
<tr>
<th></th>
<th>Postsecondary Awards in STEM-H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia</td>
<td>32.7%</td>
</tr>
<tr>
<td>Roanoke/ Alleghany Region</td>
<td>35.9%</td>
</tr>
</tbody>
</table>
Knowledge Workers Concentration

.95
Growth in Knowledge Workers

.73
Patents Awarded 2000-2015

Growth in Per Capita Patents Filed

3.55
Relative Amount of VC Investment (5 years)

- Charlottesville: 12x
- Chattanooga: 6x
- Birmingham: 7x
- R-B: 1x
Venture Capital Per Capita

.28
Strengths, Challenges & Opportunities

Beth Doughty, Roanoke Regional Partnership
Strengths

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The Western Virginia Regional Industrial Facility Authority’s identification of sites for future business attraction is a step in the right direction to address industrial real estate challenges.
Strengths

The work of the Partnership over the past 8 years has directed a new community narrative on livability and the outdoors.

New businesses and jobs have and are being attracted to the region.

The Western Virginia Regional Industrial Facility Authority’s identification of sites for future business attraction is a step in the right direction to address industrial real estate challenges.

The Virginia Tech Carilion School of Medicine and Research Institute is becoming a strong innovation asset for the region.
Weaknesses & Threats

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Employers across industries cite difficulty filling positions that require technical skills. Limited communication between employers, educators, and workforce developers has also been cited as a challenge.
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Employers across industries cite difficulty filling positions that require technical skills. Limited communication between employers, educators, and workforce developers has also been cited as a challenge.

Topography limits developable land. Specialty real estate isn’t mature. Strength of commercial real estate impacts growth on many levels.
Opportunities

Workforce Needs

Population Growth

Real Estate
Workforce Opportunities
Workforce Opportunities
Talent Attraction
Real Estate
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