

QUALIFIED INDUSTRIAL LABOR SUMMARY

Latitude:34.637011
Longitude:-82.134857

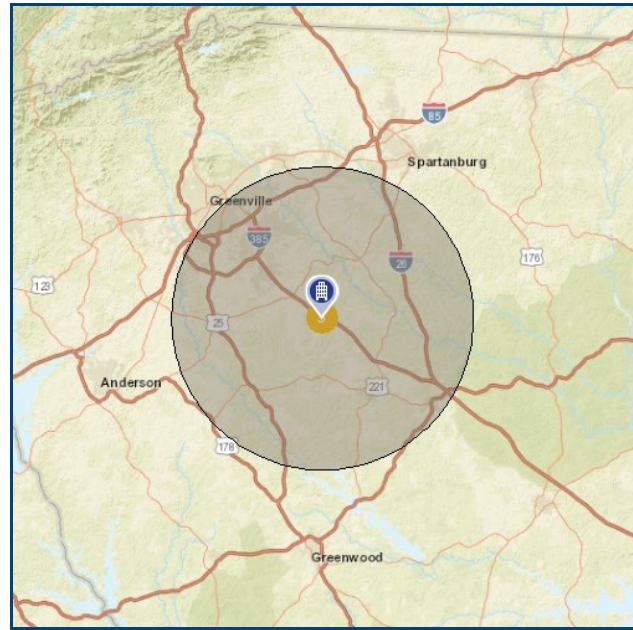
This labor data reflects a **20-Mile Radius** around the Latitude:34.637011 Longitude:-82.134857.

BASE LABOR AVAILABILITY

Population	715,842
Projected Population Growth (5 year)	6.3%
Labor Force	354,008
Labor Force Participation Rate (among working age)	76.3%

This labor summary is generated from ZIP code level data and as a result, it includes data from ZIP codes that fall entirely or partially within the selected area.

20-Mile Radius Map



AVAILABLE INDUSTRIAL WORKFORCE

	Rate in Selected Region	Estimated Available Workforce	South Carolina Rate
Overall Underemployment	15.8%	52,481	16.2%
Blue Collar Underemployment	15.6%	17,828	15.5%
White Collar & Service Underemployment	15.9%	34,653	16.5%
Production & Distribution Underemployment	20.5%	13,994	20.2%
Engineering, Science & IT Underemployment	11%	1,601	11.3%
Overall Manufacturing Underemployment	14.4%	7,989	14.5%

What does this mean?

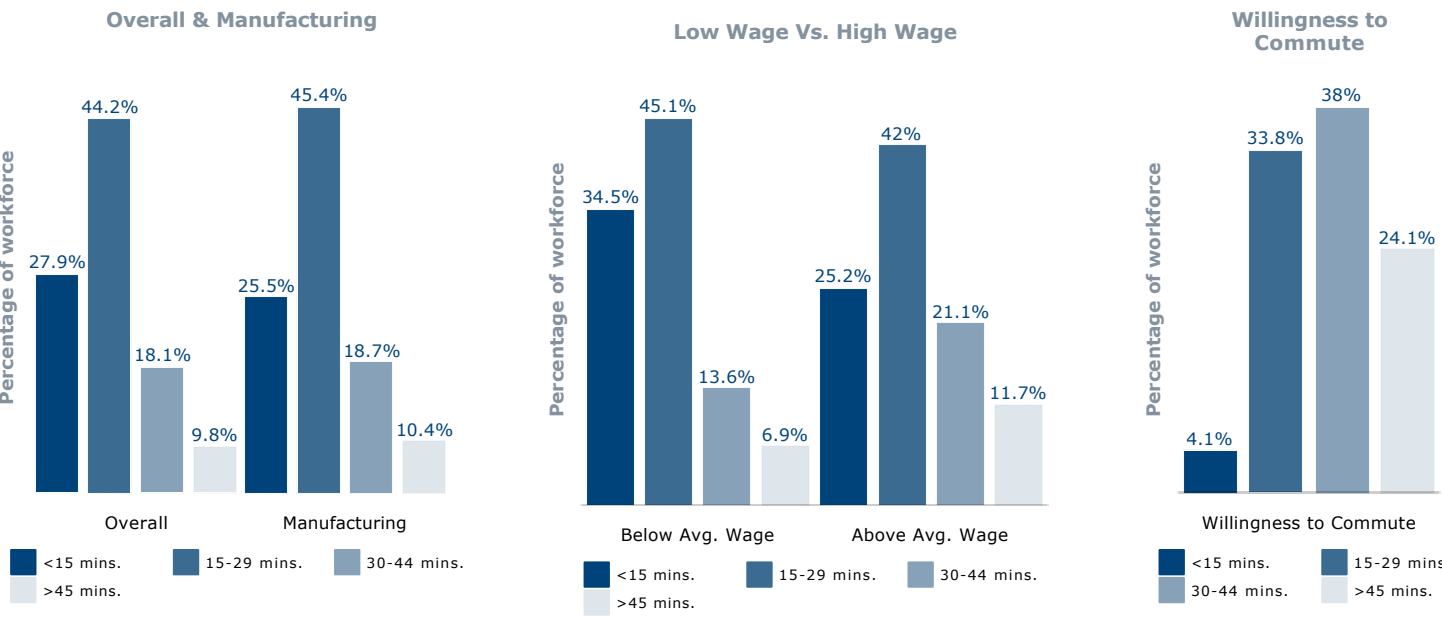
There are an estimated 52,481 underemployed workers in this region, of which 7,989 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

This lower underemployment rate compared to the state rate is a sign the labor market in this region may be tighter than the state's labor market overall, and thus, it may be relatively harder to staff a new operation.

What is Underemployment?

Underemployment is a measure of employed individuals who are either working part-time but preferring a full-time position, working in a non-permanent position but preferring a permanent job, or "overqualified" for their current position due to factors like training, education, pay scale, and job satisfaction. Underemployment is a critical measure in quantifying the real, available workforce especially for new and expanding firms in a community as they ramp-up operations.

COMMUTING PATTERNS



On average, workers travel 25.4 minutes in this region to get to work. Manufacturing workers travel 26.5 minutes to work on average in this region.

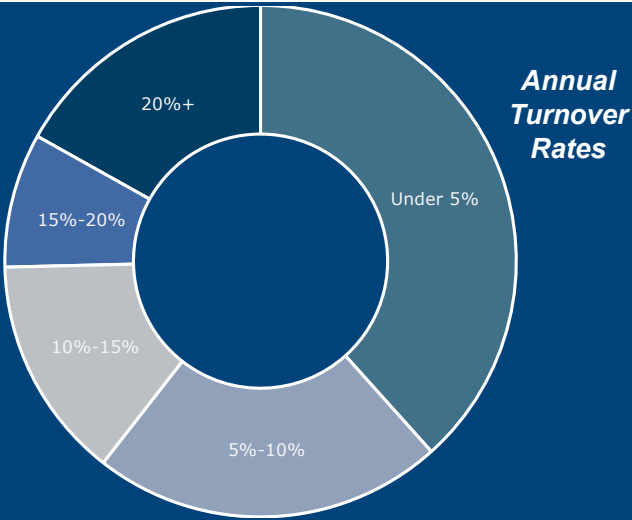
On average, workers earning relatively lower wages travel 21.9 minutes to work. Relatively higher earning workers travel 28.7 minutes for work, or 31.3% longer.

Approximately 62.1% of workers would be willing to travel more than 30 minutes for job opportunities.

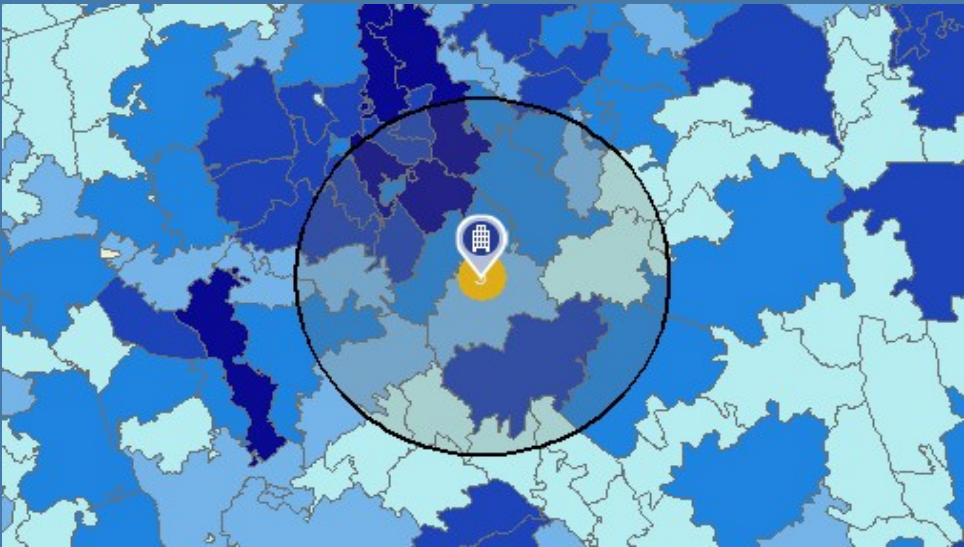
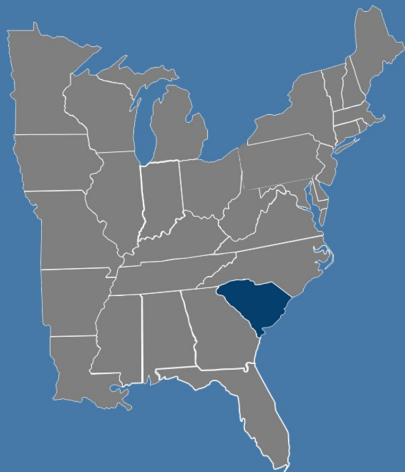
EMPLOYEE TURNOVER IN MANUFACTURING

Approximately 60.6% of interviewed and surveyed manufacturers reported annual turnover of less than 10%

Approximately 16.9% of interviewed and surveyed manufacturers reported annual turnover of more than 20%



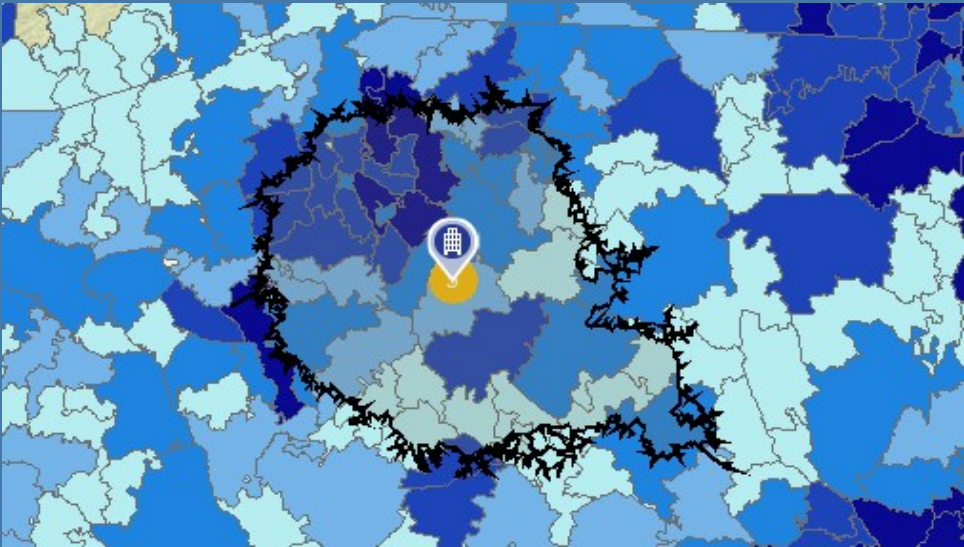
User Selected Locations & Radius: 20-Mile Radius



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The map above shows estimated underemployed by home ZIP code of manufacturing workers. Darker shaded ZIP code shows higher absolute numbers of underemployed manufacturing workers. The map also shows the user selected **20-Mile Radius**, which includes **7,989 underemployed manufacturing workers**.

Realistic Commute & Labor Draw: 46-minute drive time



< 400 401 - 1000 1001 - 1800 1801 - 2900 > 2900

Based on the results of the SC Power Team's 2017 workforce analysis, the map above shows manufacturing underemployment by ZIP code and also the **realistic labor shed** from which the manufacturing operations in this location would be able to draw most of its workers.

Specifically, an operation at this location would likely draw the vast majority of its workforce from a **46-minute Drive Time**, which includes **11,199 underemployed manufacturing workers**.

QUALIFIED INDUSTRIAL LABOR SUMMARY

Latitude:34.637011
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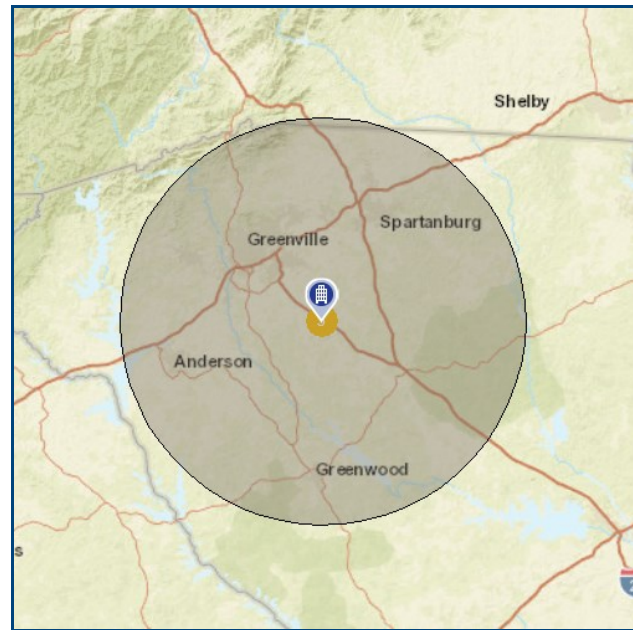
This labor data reflects a **40-Mile Radius** around the Latitude:34.637011 Longitude:-82.134857.

BASE LABOR AVAILABILITY

Population	1,471,600
Projected Population Growth (5 year)	5.2%
Labor Force	705,057
Labor Force Participation Rate (among working age)	74.4%

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40-Mile Radius Map



AVAILABLE INDUSTRIAL WORKFORCE

	Rate in Selected Region	Estimated Available Workforce	South Carolina Rate
Overall Underemployment	16.2%	108,682	16.2%
Blue Collar Underemployment	15.8%	36,774	15.5%
White Collar & Service Underemployment	16.4%	71,908	16.5%
Production & Distribution Underemployment	20.4%	27,921	20.2%
Engineering, Science & IT Underemployment	11.1%	2,961	11.3%
Overall Manufacturing Underemployment	14.6%	14,698	14.5%

What does this mean?

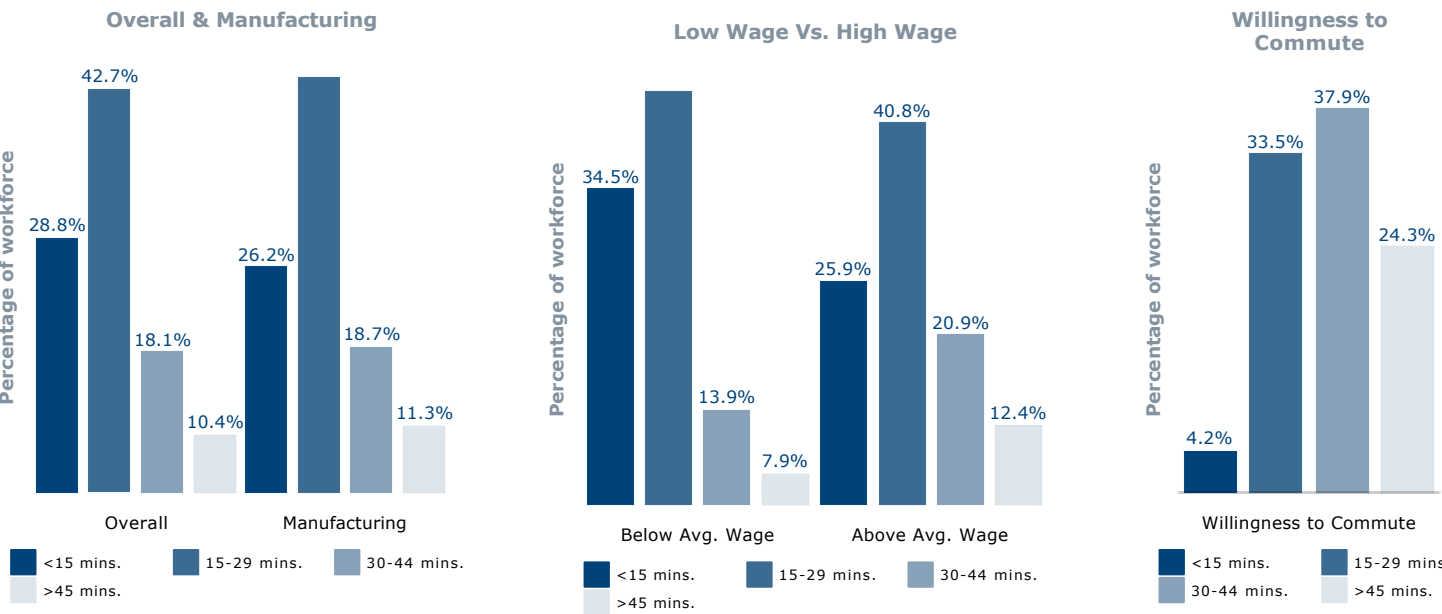
There are an estimated 108,682 underemployed workers in this region, of which 14,698 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

This lower underemployment rate compared to the state rate is a sign the labor market in this region may be tighter than the state's labor market overall, and thus, it may be relatively harder to staff a new operation.

What is Underemployment?

Underemployment is a measure of employed individuals who are either working part-time but preferring a full-time position, working in a non-permanent position but preferring a permanent job, or "overqualified" for their current position due to factors like training, education, pay scale, and job satisfaction. Underemployment is a critical measure in quantifying the real, available workforce especially for new and expanding firms in a community as they ramp-up operations.

COMMUTING PATTERNS



On average, workers travel 25.5 minutes in this region to get to work. Manufacturing workers travel 26.7 minutes to work on average in this region.

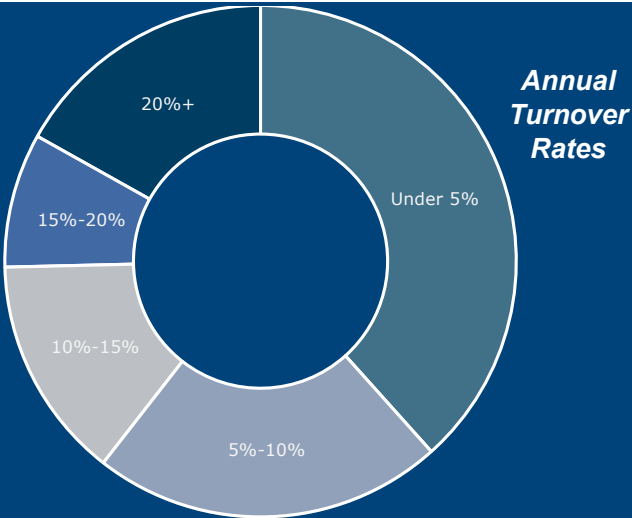
On average, workers earning relatively lower wages travel 22.1 minutes to work. Relatively higher earning workers travel 28.9 minutes for work, or 30.9% longer.

Approximately 62.3% of workers would be willing to travel more than 30 minutes for job opportunities.

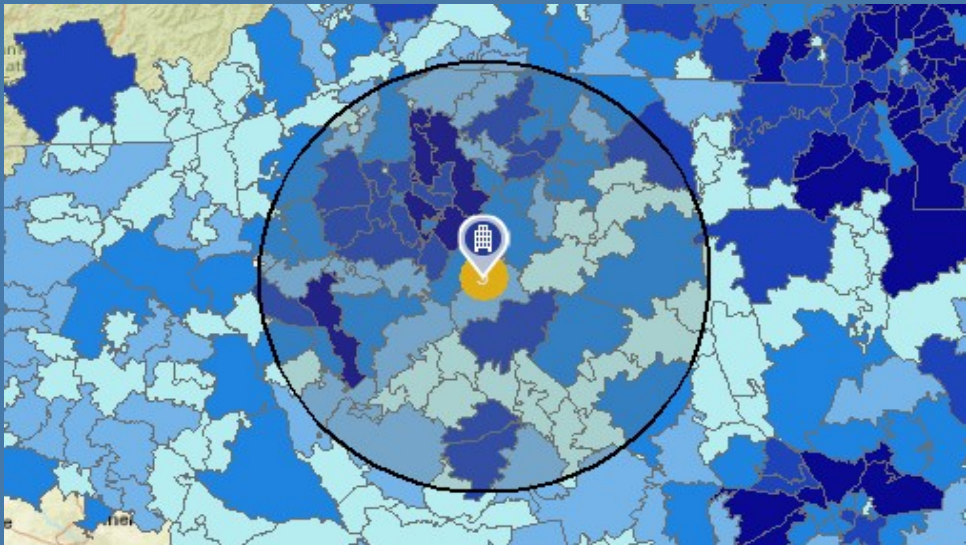
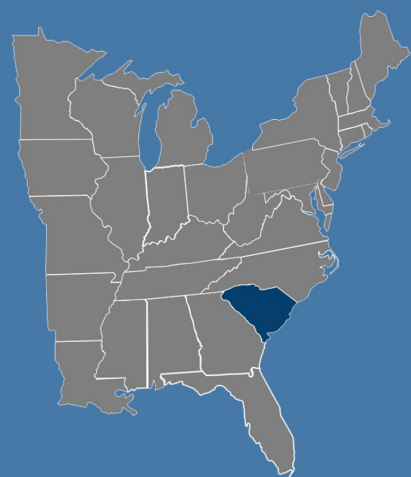
EMPLOYEE TURNOVER IN MANUFACTURING

Approximately 60.6% of interviewed and surveyed manufacturers reported annual turnover of less than 10%

Approximately 16.9% of interviewed and surveyed manufacturers reported annual turnover of more than 20%



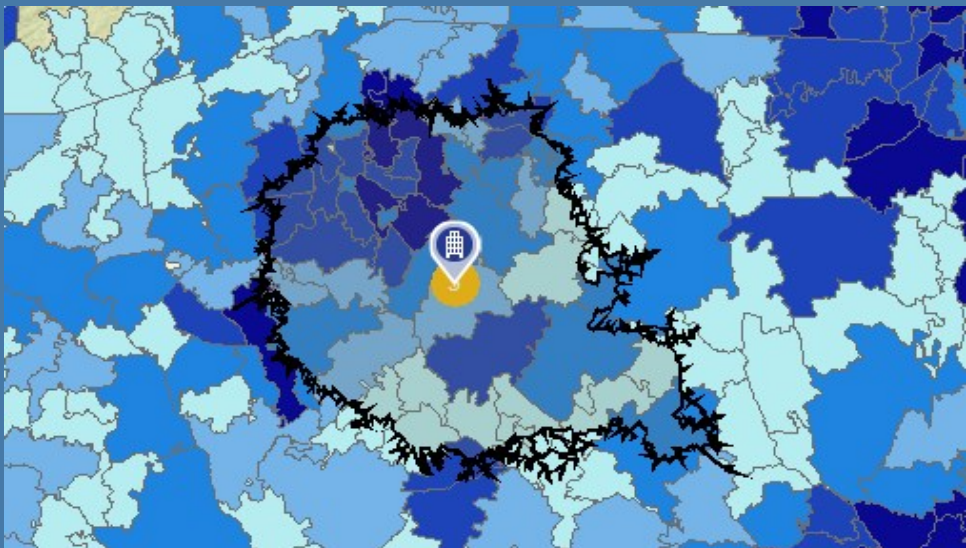
User Selected Locations & Radius: 40-Mile Radius



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The map above shows estimated underemployed by home ZIP code of manufacturing workers. Darker shaded ZIP code shows higher absolute numbers of underemployed manufacturing workers. The map also shows the user selected **40-Mile Radius**, which includes **14,698 underemployed manufacturing workers**.

Realistic Commute & Labor Draw: 46-minute drive time



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Based on the results of the SC Power Team's 2017 workforce analysis, the map above shows manufacturing underemployment by ZIP code and also the **realistic labor shed** from which the manufacturing operations in this location would be able to draw most of its workers.

Specifically, an operation at this location would likely draw the vast majority of its workforce from a **46-minute Drive Time**, which includes **11,199 underemployed manufacturing workers**.

QUALIFIED INDUSTRIAL LABOR SUMMARY

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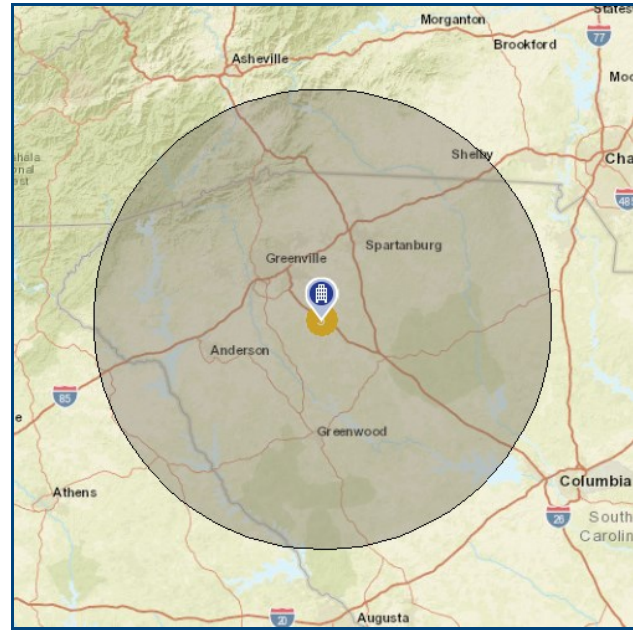
This labor data reflects a **60-Mile Radius** around the Latitude:34.637011 Longitude:-82.134857.

BASE LABOR AVAILABILITY

Population	2,429,544
Projected Population Growth (5 year)	5%
Labor Force	1,161,096
Labor Force Participation Rate (among working age)	74.7%

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60-Mile Radius Map



AVAILABLE INDUSTRIAL WORKFORCE

	Rate in Selected Region	Estimated Available Workforce	South Carolina Rate
Overall Underemployment	16.2%	177,316	16.2%
Blue Collar Underemployment	15.6%	58,021	15.5%
White Collar & Service Underemployment	16.5%	119,295	16.5%
Production & Distribution Underemployment	20.3%	42,585	20.2%
Engineering, Science & IT Underemployment	11.3%	4,812	11.3%
Overall Manufacturing Underemployment	14.5%	22,214	14.5%

What does this mean?

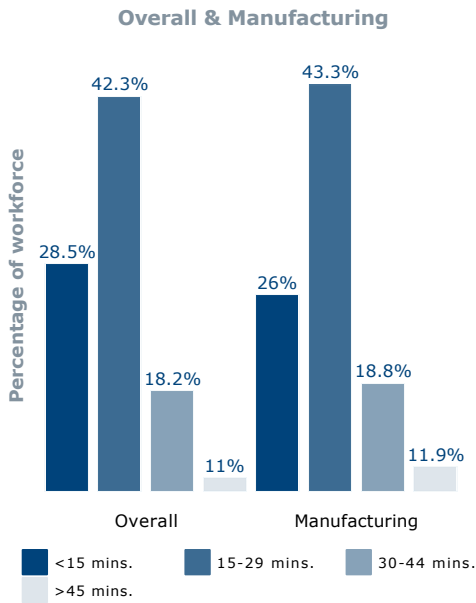
There are an estimated 177,316 underemployed workers in this region, of which 22,214 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

This lower underemployment rate compared to the state rate is a sign the labor market in this region may be tighter than the state's labor market overall, and thus, it may be relatively harder to staff a new operation.

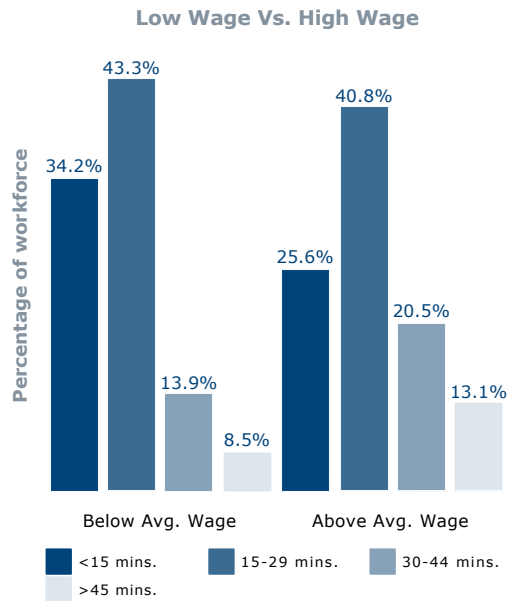
What is Underemployment?

Underemployment is a measure of employed individuals who are either working part-time but preferring a full-time position, working in a non-permanent position but preferring a permanent job, or "overqualified" for their current position due to factors like training, education, pay scale, and job satisfaction. Underemployment is a critical measure in quantifying the real, available workforce especially for new and expanding firms in a community as they ramp-up operations.

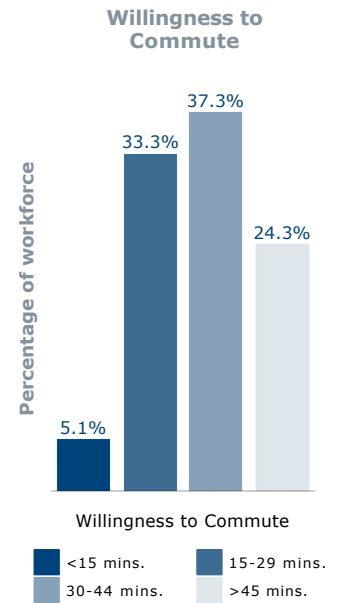
COMMUTING PATTERNS



On average, workers travel 25.6 minutes in this region to get to work. Manufacturing workers travel 26.8 minutes to work on average in this region.



On average, workers earning relatively lower wages travel 22.2 minutes to work. Relatively higher earning workers travel 29 minutes for work, or 30.5% longer.

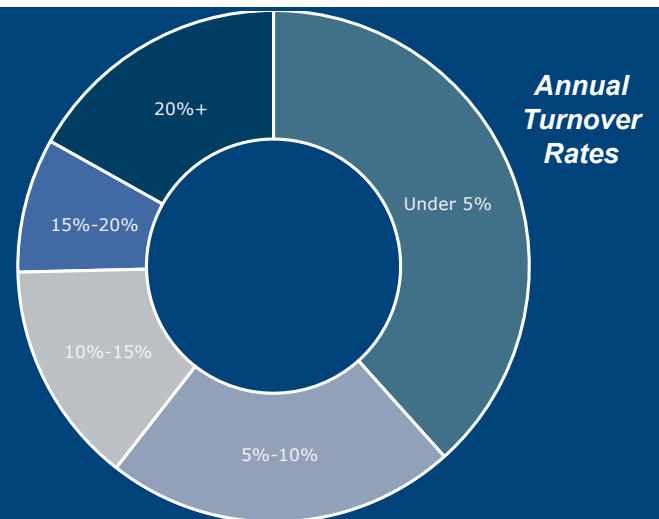


Approximately 61.7% of workers would be willing to travel more than 30 minutes for job opportunities.

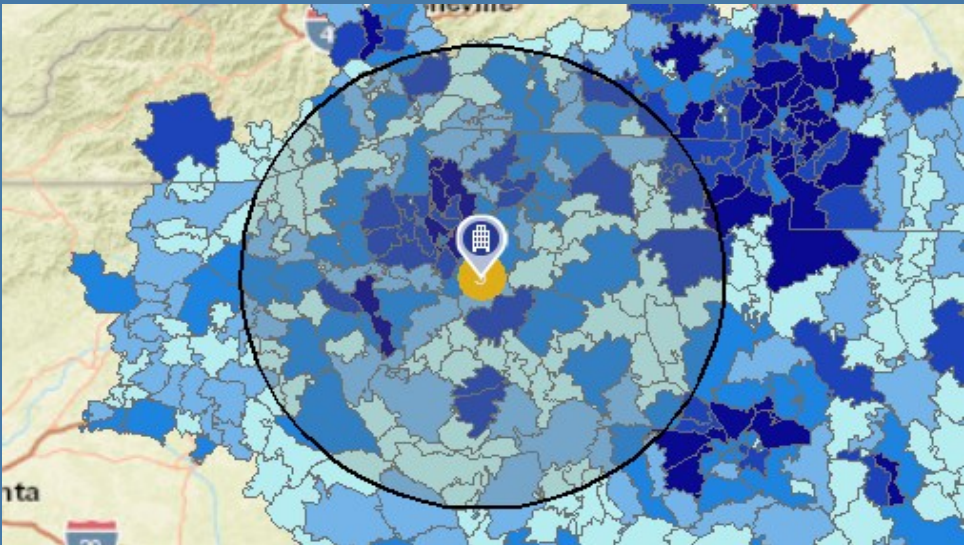
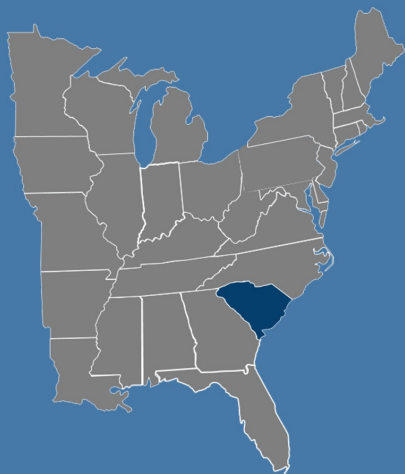
EMPLOYEE TURNOVER IN MANUFACTURING

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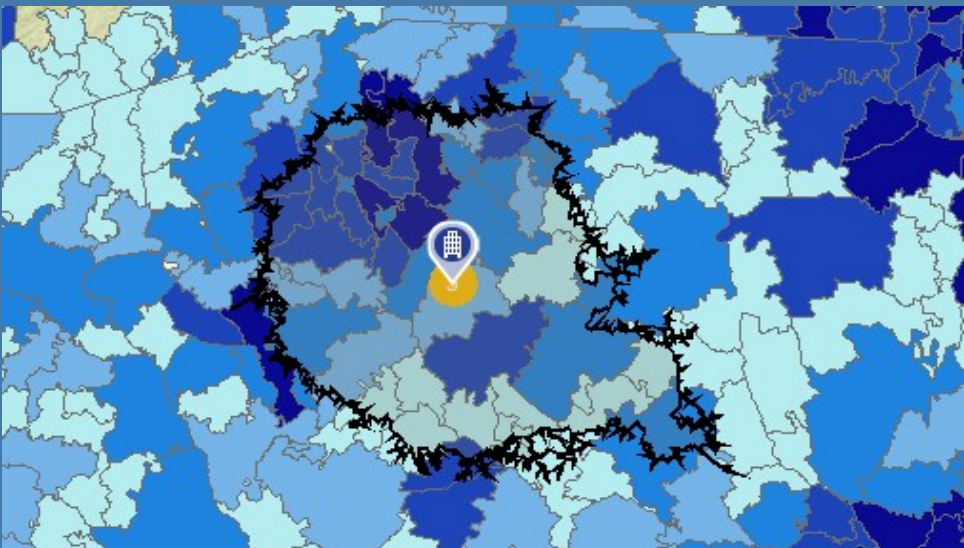
User Selected Locations & Radius: 60-Mile Radius



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The map above shows estimated underemployed by home ZIP code of manufacturing workers. Darker shaded ZIP code shows higher absolute numbers of underemployed manufacturing workers. The map also shows the user selected **60-Mile Radius**, which includes **22,214 underemployed manufacturing workers**.

Realistic Commute & Labor Draw: 46-minute drive time



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Specifically, an operation at this location would likely draw the vast majority of its workforce from a **46-minute Drive Time**, which includes **11,199 underemployed manufacturing workers**.

APPENDIX & METHODOLOGY

The majority of the data presented herein is primary data collected and analyzed as part of the SC Power Team's 2017 comprehensive, statewide workforce analysis. Specific data sources and methods are noted below, but overall, this data leverages approximately 12,000 survey responses from the South Carolina workforce, and 234 company level surveys and interviews.

DEMOGRAPHICS

Baseline demographic data gives an overview of the overall workforce and population trends in a region, along with broad strengths and challenges. They are sourced from Claritas/Nielsen 2017. Population growth estimates are from 2017 to 2022. Labor Force participation is calculated as a percentage of individuals age 16-65 divided by the number of individuals in the workforce.

UNDEREMPLOYMENT

Underemployment measures employed individuals who are either working part-time but preferring full time work, non-permanent workers preferring a permanent position, and "overqualified" individuals. All component estimates are calculated using the results of the statewide comprehensive workforce survey. In general, this data helps quantify the employed workforce that may be more likely to change jobs to work for new and expanding firms in a community.

OCCUPATIONAL DEFINITIONS

To estimate absolute levels of underemployment (i.e. a certain number of workers rather than a rate) applicable underemployment rates were multiplied by estimates of individuals working in specific industry or occupational category. This latter data was gathered via EMSI (Q3 – 2017). Specific industry and occupational definitions follow:

- **Manufacturing Occupations:** Industry NAICS code 31-33
- **Blue Collar Occupations:** SOC 33 – Protective Services; 37 – Building & Grounds Maintenance; 45 – Farming, Fishing, Forestry; 47 – Construction; 49 – Installation & Repair; 51 – Production; 53 – Transportation
- **White Collar Occupations:** All other occupational codes, excluding Military Occupations
- **Production/Distribution Occupations:** SOC 51 – Production; 53 – Transportation
- **IT/Engineering/Science Occupations:** SOC 15 – Computer & IT; 17 – Engineering; 19 – Life, Physical, and Social Science

COMMUTING

Commuting data were estimated using both the workforce survey results, but were also supplemented with an additional 6,300 employee home ZIP records provided by interviewed employers and further calibrated using secondary data sources. Commuting data by wage levels estimate the commuting patterns for individuals paid in the lowest quartile of wages relative to the estimated average county wage ("Below Avg. Wage") and for individuals in the highest quartile of wages relative to the estimated average county wage ("Above Avg. Wage"). Willingness to commute data leverage only survey results, and shows individuals' reported maximum willingness to commute for a job. Overall, this data is critical to understanding what are the true geographic zones new and existing employers could realistically draw workers from.

TURNOVER

Estimated manufacturing turnover rates are based on in-depth interviews and surveys of 234 companies across South Carolina, primarily focused in manufacturing. For each selected geography, estimated turnover rates are provided for interviewed/surveyed companies in counties within a 45-minute Drive Time of the selected point.