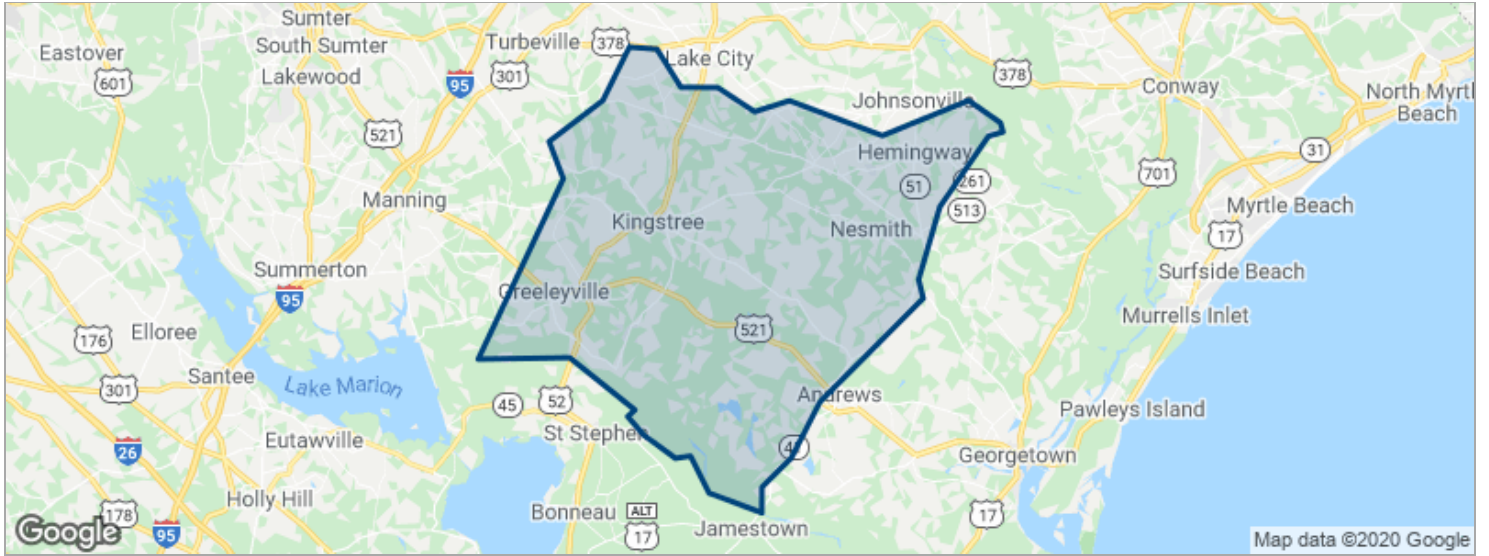


Qualified Industrial Labor Summary

Williamsburg County, South Carolina



Realistic Commute & Labor Draw from this location: 48 min drive time.

Base Labor Availability

	TOTAL
Population	41,698
Population (5 year estimate)	41,416
Labor Force	20,712
Working Age Population (Age 16-65)	26,873
Working Age Participation Rate %	77

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.

Available Industrial Workforce

	TOTAL	%
Overall Underemployment	3,650	18.29
Overall Manufacturing Underemployment	419	15.56
Blue Collar Underemployment	1,331	18.49
Production and Distribution Underemployment	713	21.57
White Collar Underemployment	2,274	18.17
Engineering and Science Underemployment	60	11.90

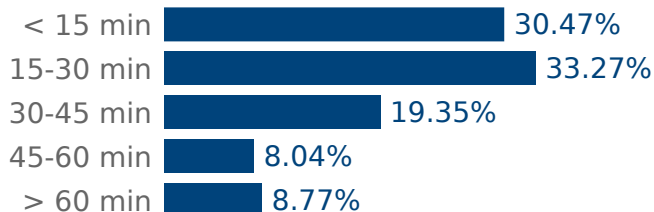
What does this mean?

There are an estimated 3,650 underemployed workers in this region, of which 419 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities. This higher underemployment rate compared to the state rate is a sign the labor market in this region may be slacker than the state's labor market overall, and thus, it may be relatively easier to staff a new operation.

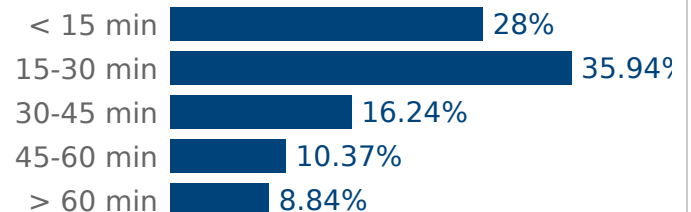
What is Underemployment?

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.

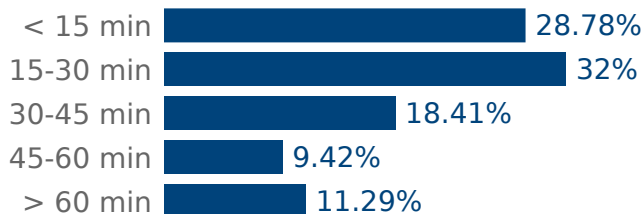
Commuting Overall



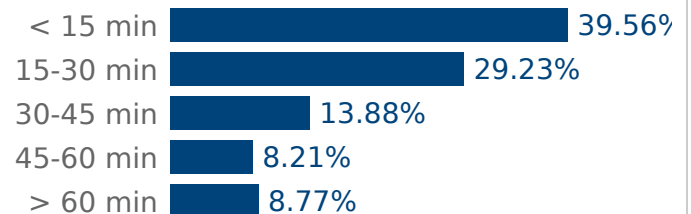
Manufacturing Commute



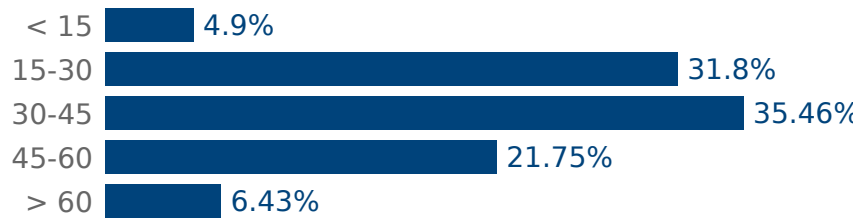
Top Wage Commute



Bottom Wage Commute

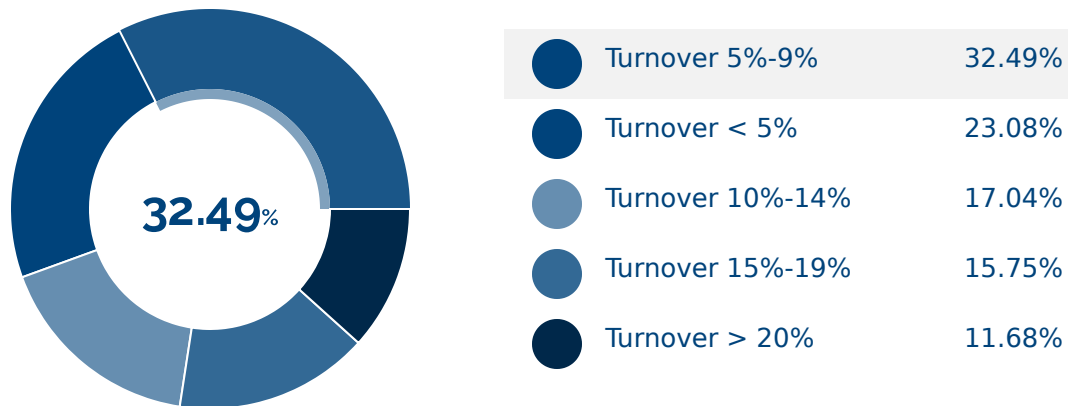


Commute Willingness



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.

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.

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: \$OC 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

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