**20-Mile Radius Map**

This labor data reflects a *20-Mile Radius* around the Golden Corner Commerce Park.

## BASE LABOR AVAILABILITY

| | |
|---|---|
| Population | 342,574 |
| Projected Population Growth (5 year) | 3.7% |
| Labor Force | 153,328 |
| Labor Force Participation Rate (among working age) | 70.8% |

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.
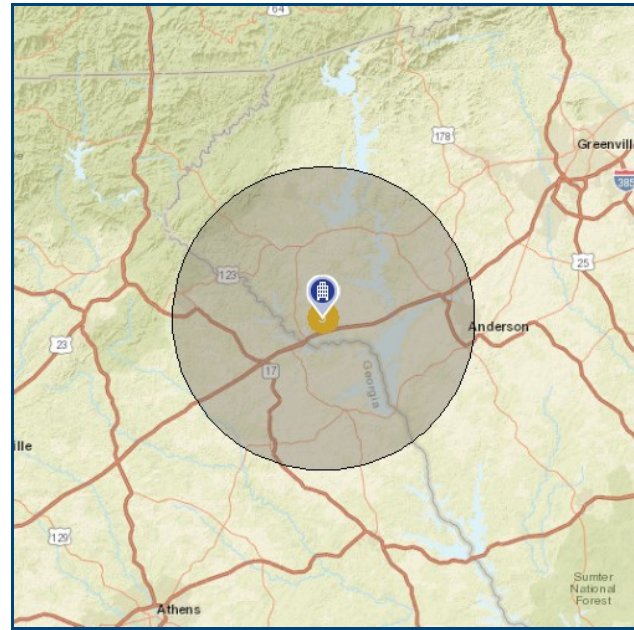


| AVAILABLE INDUSTRIAL WORKFORCE | Rate in Selected Region | Estimated Available Workforce | South Carolina Rate |
|---|---|---|---|
| Overall Underemployment | 16.8% | 25,589 | 16.2% |
| Blue Collar Underemployment | 16.1% | 8,315 | 15.5% |
| White Collar & Service Underemployment | 17.1% | 17,275 | 16.5% |
| Production & Distribution Underemployment | 20.2% | 6,114 | 20.2% |
| Engineering, Science & IT Underemployment | 11.2% | 639 | 11.3% |
| Overall Manufacturing Underemployment | 14.8% | 3,620 | 14.5% |

**What does this mean?**

There are an estimated 25,589 underemployed workers in this region, of which 3,620 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.
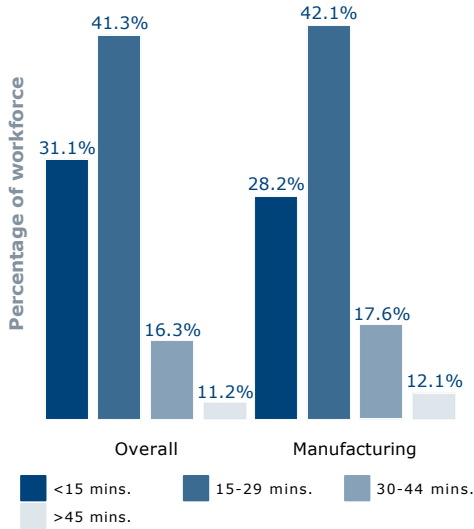
This higher underemployment rate compared to the state rate is a sign the labor market in this region may be slacker than the state's labor market overall, and thus, it may be relatively easier to staff a new operation.

*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.*
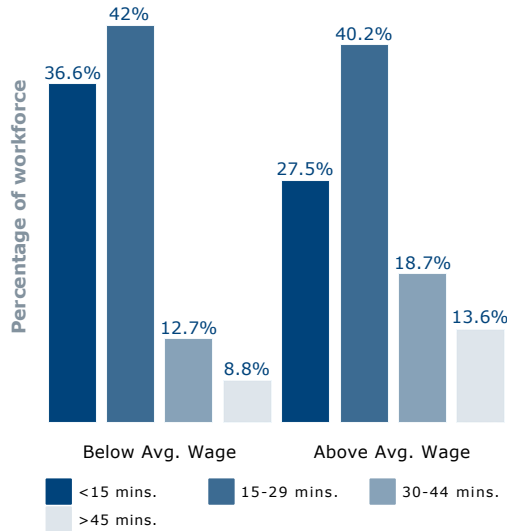
**SC POWER TEAM**

## COMMUTING PATTERNS

### Overall & Manufacturing

Percentage of workforce

- Overall: <15 mins. 31.1%, 15-29 mins. 41.3%, 30-44 mins. 16.3%, >45 mins. 11.2%
- Manufacturing: <15 mins. 28.2%, 15-29 mins. 42.1%, 30-44 mins. 17.6%, >45 mins. 12.1%

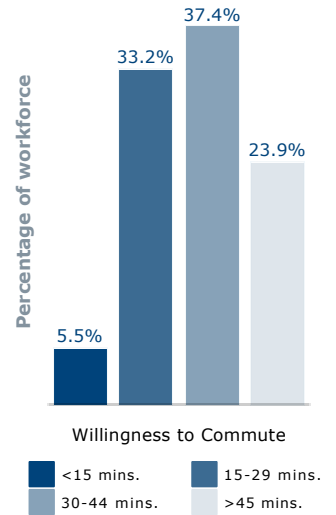Legend: ■ <15 mins. ■ 15-29 mins. ■ 30-44 mins. □ >45 mins.

*On average, workers travel 25.1 minutes in this region to get to work. Manufacturing workers travel 26.5 minutes to work on average in this region.*

### Low Wage Vs. High Wage

Percentage of workforce

- Below Avg. Wage: <15 mins. 36.6%, 15-29 mins. 42%, 30-44 mins. 12.7%, >45 mins. 8.8%
- Above Avg. Wage: <15 mins. 27.5%, 15-29 mins. 40.2%, 30-44 mins. 18.7%, >45 mins. 13.6%

Legend: ■ <15 mins. ■ 15-29 mins. ■ 30-44 mins. □ >45 mins.

*On average, workers earning relatively lower wages travel 22.5 minutes to work. Relatively higher earning workers travel 29.2 minutes for work, or 29.8% longer.*

### Willingness to Commute

Percentage of workforce

- Willingness to Commute: <15 mins. 5.5%, 15-29 mins. 33.2%, 30-44 mins. 37.4%, >45 mins. 23.9%

Legend: ■ <15 mins. ■ 15-29 mins. ■ 30-44 mins. □ >45 mins.

*Approximately 61.3% of workers would be willing to travel more than 30 minutes for job opportunities.*
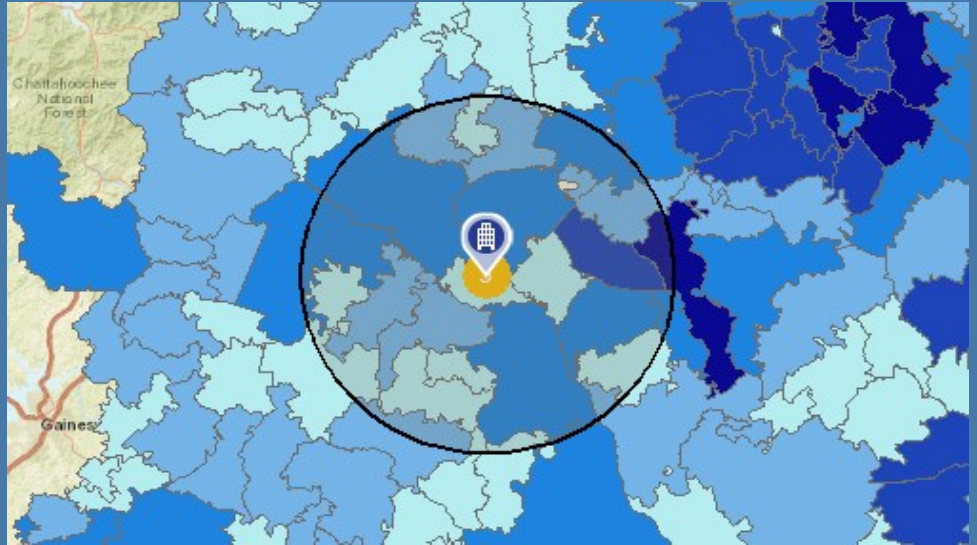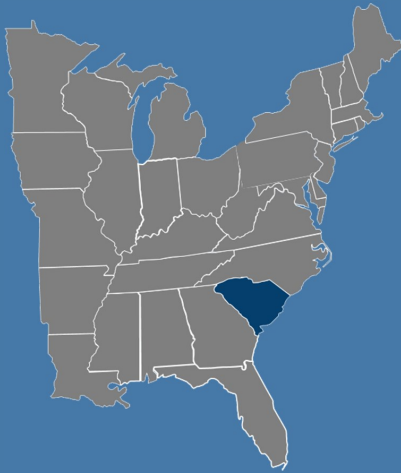
## EMPLOYEE TURNOVER IN MANUFACTURING

*Approximately 61.6% of interviewed and surveyed manufacturers reported annual turnover of less than 10%*

*Approximately 12.9% of interviewed and surveyed manufacturers reported annual turnover of more than 20%*

*Annual Turnover Rates*

Donut chart segments: 20%+, 15%-20%, 10%-15%, 5%-10%, Under 5%

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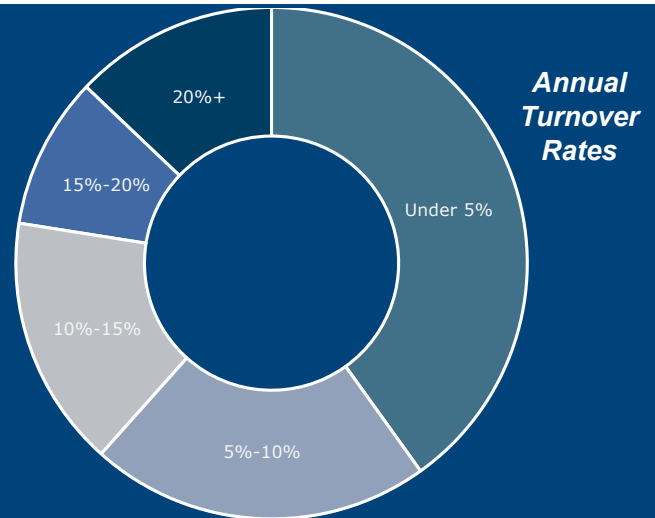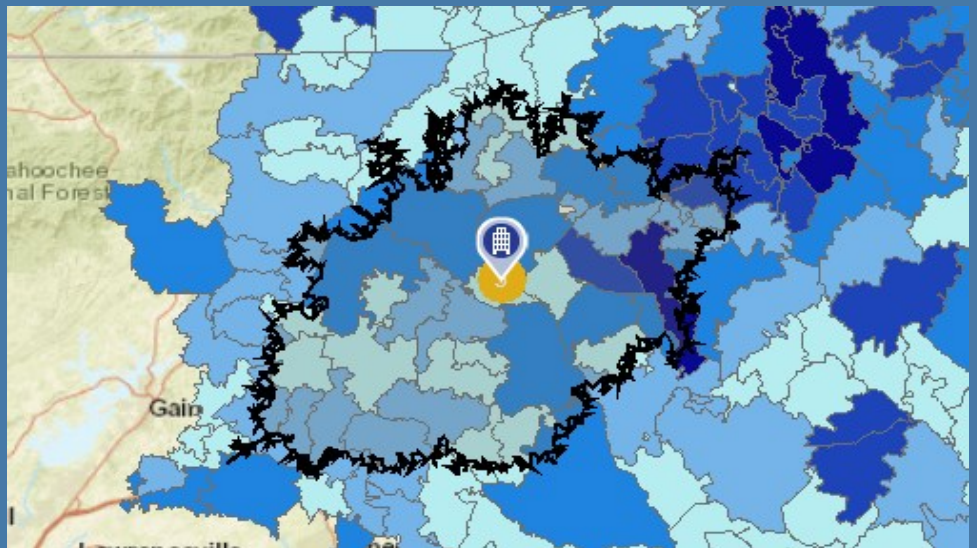
**User Selected Locations & Radius: 20-Mile Radius**



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

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 **3,620 underemployed manufacturing workers.**

**Realistic Commute & Labor Draw:** 43-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 **43-minute Drive Time, which includes 6,320 underemployed manufacturing workers.**

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This labor data reflects a **40-Mile Radius** around the Golden Corner Commerce Park.

## BASE LABOR AVAILABILITY

| | |
|---|---|
| Population | 1,074,402 |
| Projected Population Growth (5 year) | 4.7% |
| Labor Force | 496,773 |
| Labor Force Participation Rate (among working age) | 72.3% |

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.

**40-Mile Radius Map**
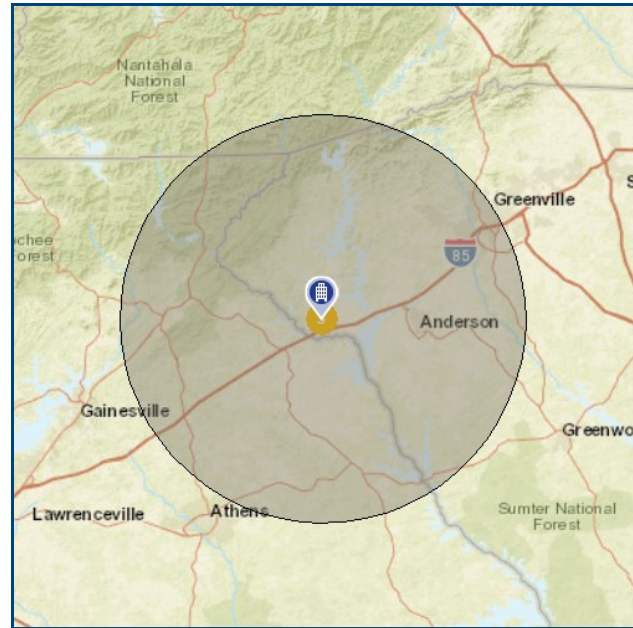


| AVAILABLE INDUSTRIAL WORKFORCE | Rate in Selected Region | Estimated Available Workforce | South Carolina Rate |
|---|---|---|---|
| Overall Underemployment | 16.4% | 77,424 | 16.2% |
| Blue Collar Underemployment | 15.7% | 24,781 | 15.5% |
| White Collar & Service Underemployment | 16.8% | 52,643 | 16.5% |
| Production & Distribution Underemployment | 20.2% | 17,926 | 20.2% |
| Engineering, Science & IT Underemployment | 11.2% | 1,982 | 11.3% |
| Overall Manufacturing Underemployment | 14.6% | 8,902 | 14.5% |

### What does this mean?

There are an estimated 77,424 underemployed workers in this region, of which 8,902 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.
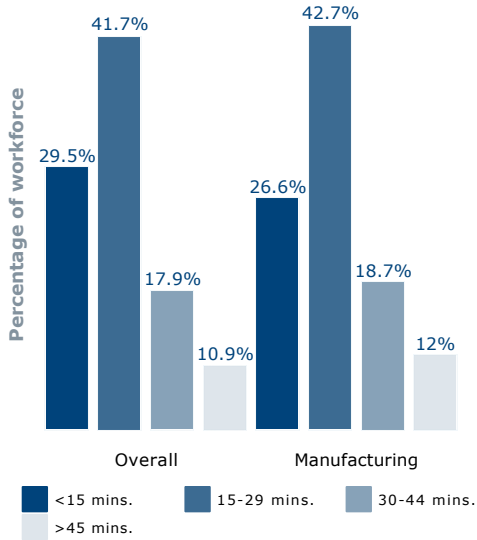
This higher underemployment rate compared to the state rate is a sign the labor market in this region may be slacker than the state's labor market overall, and thus, it may be relatively easier to staff a new operation.

### *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.*
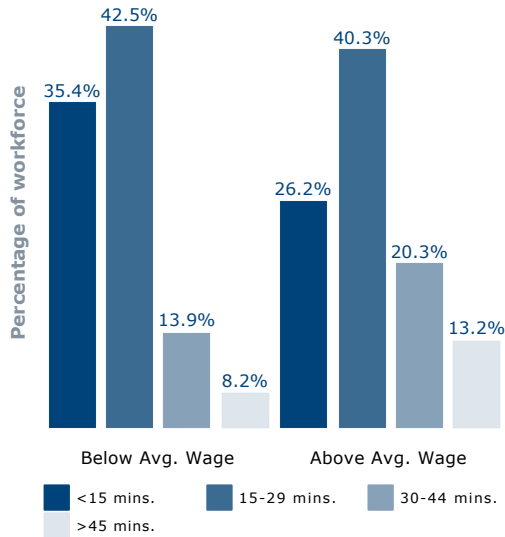
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## COMMUTING PATTERNS

### Overall & Manufacturing



**Overall:** <15 mins. 29.5% | 15-29 mins. 41.7% | 30-44 mins. 17.9% | >45 mins. 10.9%
**Manufacturing:** <15 mins. 26.6% | 15-29 mins. 42.7% | 30-44 mins. 18.7% | >45 mins. 12%
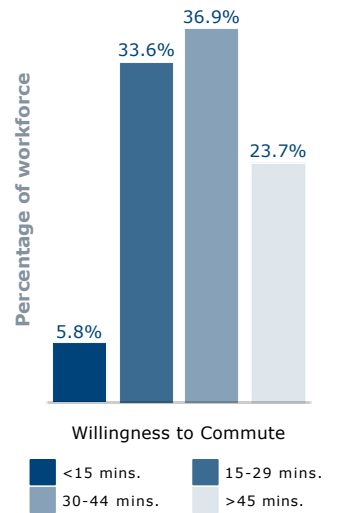
Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*On average, workers travel 25.4 minutes in this region to get to work. Manufacturing workers travel 26.8 minutes to work on average in this region.*

### Low Wage Vs. High Wage



**Below Avg. Wage:** <15 mins. 35.4% | 15-29 mins. 42.5% | 30-44 mins. 13.9% | >45 mins. 8.2%
**Above Avg. Wage:** <15 mins. 26.2% | 15-29 mins. 40.3% | 30-44 mins. 20.3% | >45 mins. 13.2%

Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*On average, workers earning relatively lower wages travel 22.3 minutes to work. Relatively higher earning workers travel 29 minutes for work, or 30.3% longer.*
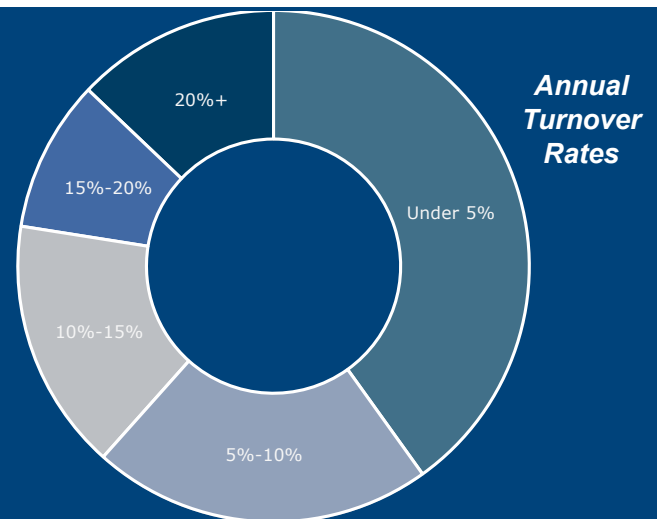
### Willingness to Commute



**Willingness to Commute:** <15 mins. 5.8% | 15-29 mins. 33.6% | 30-44 mins. 36.9% | >45 mins. 23.7%

Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*Approximately 60.6% of workers would be willing to travel more than 30 minutes for job opportunities.*
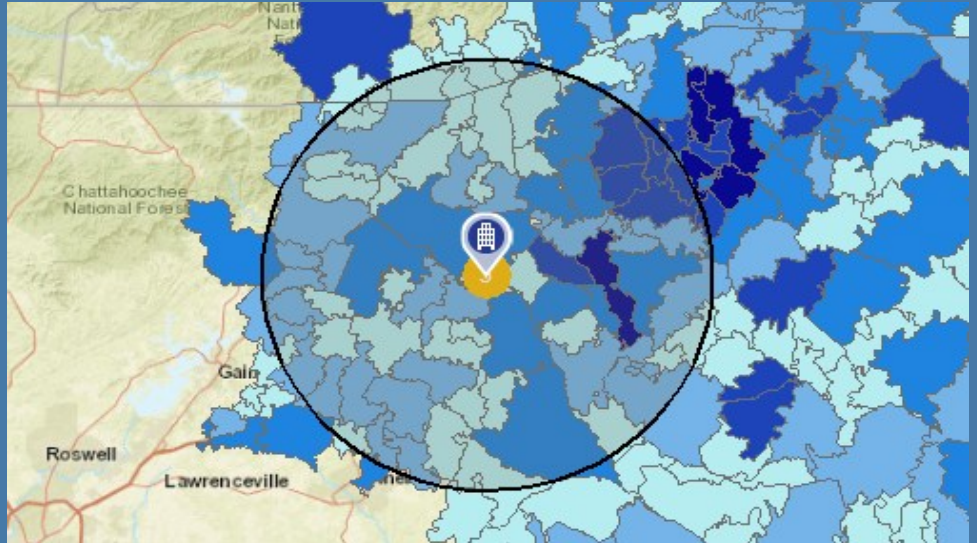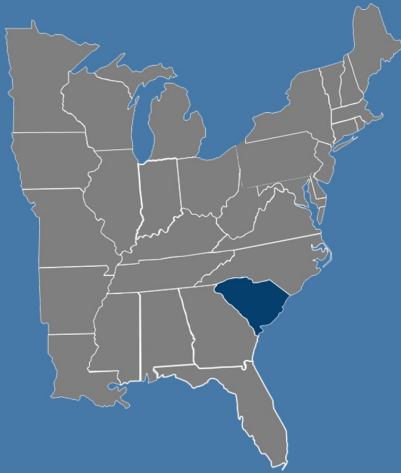
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### EMPLOYEE TURNOVER IN MANUFACTURING

*Approximately 61.6% of interviewed and surveyed manufacturers reported annual turnover of less than 10%*

*Approximately 12.9% of interviewed and surveyed manufacturers reported annual turnover of more than 20%*



*Annual Turnover Rates*

Segments: 20%+ | 15%-20% | 10%-15% | 5%-10% | Under 5%

# QUALIFIED INDUSTRIAL LABOR SUMMARY

**User Selected Locations & Radius:** 40-Mile Radius



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

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 **8,902 underemployed manufacturing workers.**
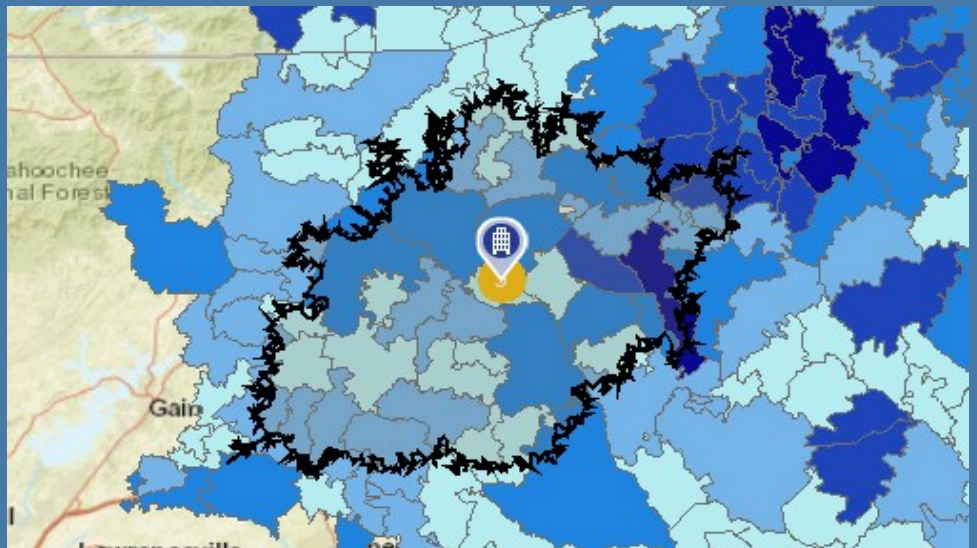
**Realistic Commute & Labor Draw:** 43-minute drive time



| | < 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 **43-minute Drive Time,** which includes **6,320 underemployed manufacturing workers.**

**SC POWER TEAM**

This labor data reflects a **60-Mile Radius** around the Golden Corner Commerce Park.

## BASE LABOR AVAILABILITY

| | |
|---|---|
| Population | 1,733,821 |
| Projected Population Growth (5 year) | 5.1% |
| Labor Force | 816,159 |
| Labor Force Participation Rate (among working age) | 73.8% |

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.

**60-Mile Radius Map**
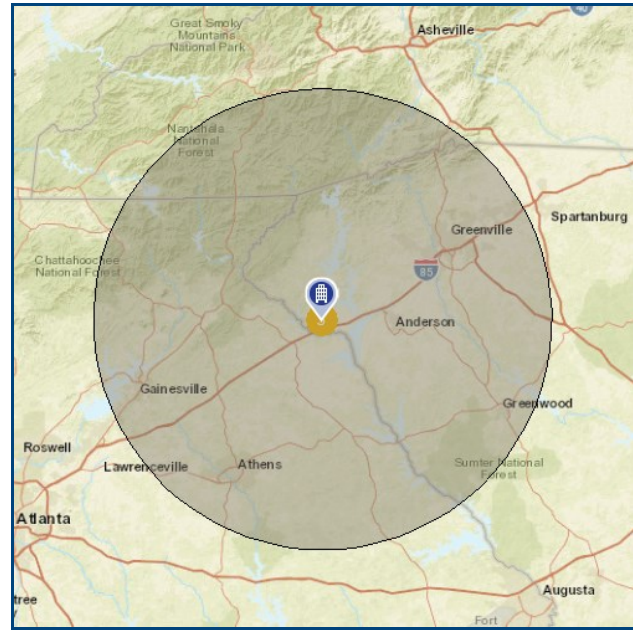


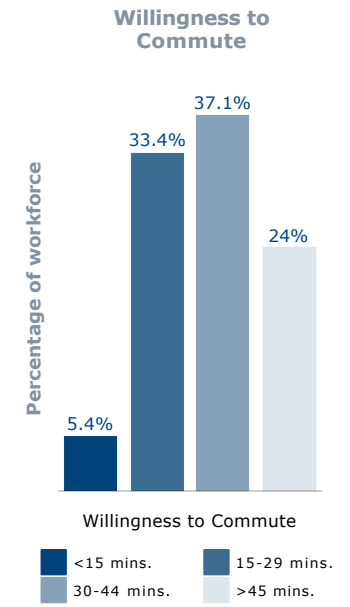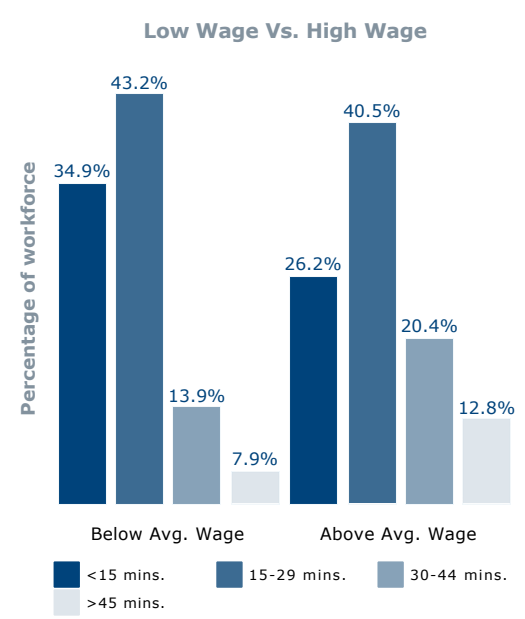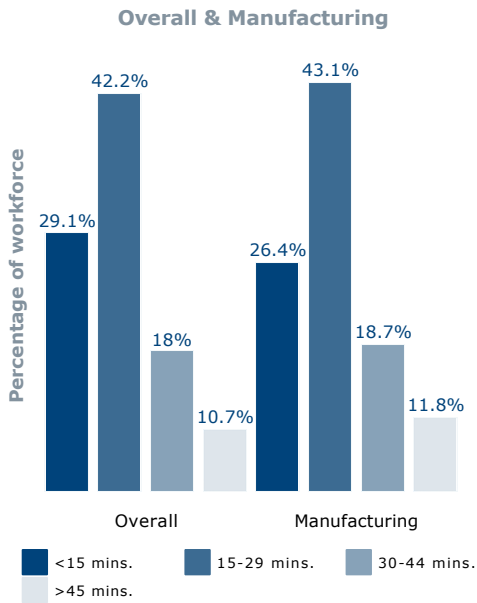| AVAILABLE INDUSTRIAL WORKFORCE | Rate in Selected Region | Estimated Available Workforce | South Carolina Rate |
|---|---|---|---|
| Overall Underemployment | 16.1% | 124,029 | 16.2% |
| Blue Collar Underemployment | 15.5% | 40,368 | 15.5% |
| White Collar & Service Underemployment | 16.4% | 83,661 | 16.5% |
| Production & Distribution Underemployment | 20.3% | 29,945 | 20.2% |
| Engineering, Science & IT Underemployment | 11.2% | 3,332 | 11.3% |
| Overall Manufacturing Underemployment | 14.5% | 15,535 | 14.5% |

### What does this mean?

There are an estimated 124,029 underemployed workers in this region, of which 15,535 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.*

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## COMMUTING PATTERNS

### Overall & Manufacturing

**Percentage of workforce**

Overall:
- 29.1% (<15 mins.)
- 42.2% (15-29 mins.)
- 18% (30-44 mins.)
- 10.7% (>45 mins.)

Manufacturing:
- 26.4% (<15 mins.)
- 43.1% (15-29 mins.)
- 18.7% (30-44 mins.)
- 11.8% (>45 mins.)

Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*On average, workers travel 25.4 minutes in this region to get to work. Manufacturing workers travel 26.8 minutes to work on average in this region.*

### Low Wage Vs. High Wage

**Percentage of workforce**

Below Avg. Wage:
- 34.9% (<15 mins.)
- 43.2% (15-29 mins.)
- 13.9% (30-44 mins.)
- 7.9% (>45 mins.)

Above Avg. Wage:
- 26.2% (<15 mins.)
- 40.5% (15-29 mins.)
- 20.4% (30-44 mins.)
- 12.8% (>45 mins.)

Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*On average, workers earning relatively lower wages travel 22.2 minutes to work. Relatively higher earning workers travel 29 minutes for work, or 30.4% longer.*

### Willingness to Commute

**Percentage of workforce**

Willingness to Commute:
- 5.4% (<15 mins.)
- 33.4% (15-29 mins.)
- 37.1% (30-44 mins.)
- 24% (>45 mins.)

Legend: <15 mins. | 15-29 mins. | 30-44 mins. | >45 mins.

*Approximately 61.1% of workers would be willing to travel more than 30 minutes for job opportunities.*
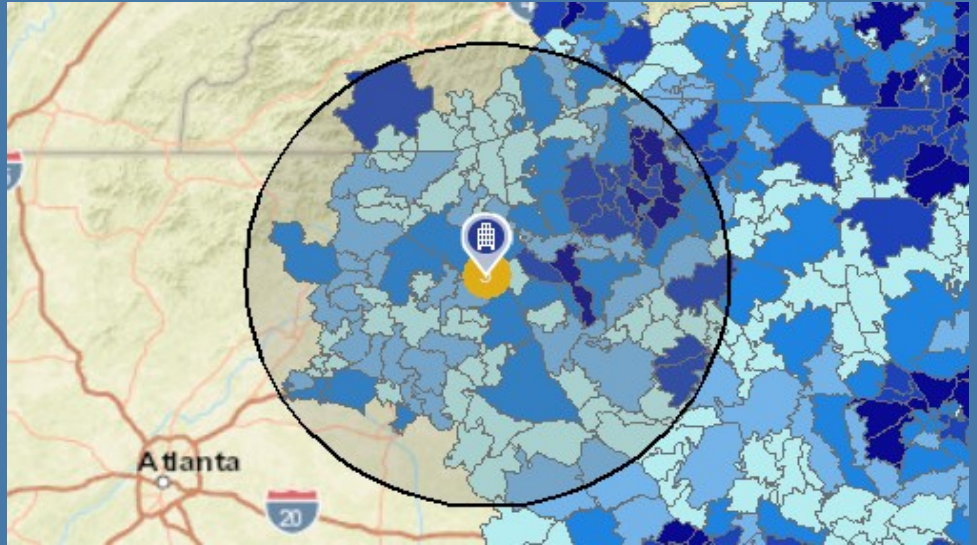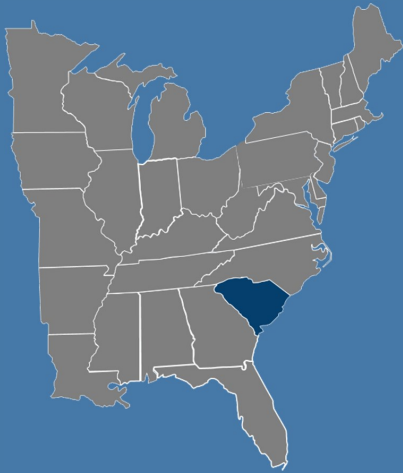
### EMPLOYEE TURNOVER IN MANUFACTURING

*Approximately 61.6% of interviewed and surveyed manufacturers reported annual turnover of less than 10%*

*Approximately 12.9% of interviewed and surveyed manufacturers reported annual turnover of more than 20%*

**Annual Turnover Rates**

- 20%+
- 15%-20%
- 10%-15%
- 5%-10%
- Under 5%

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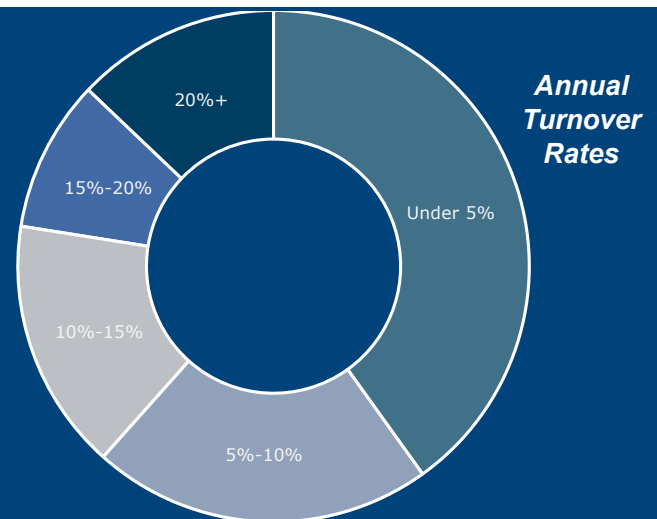
User Selected Locations & Radius: 60-Mile Radius



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

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 **15,535 underemployed manufacturing workers.**
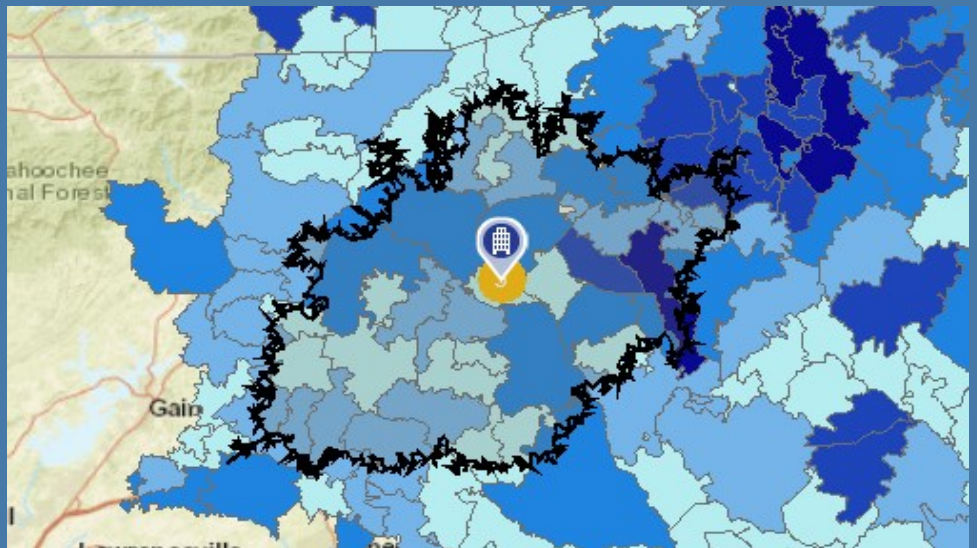
**Realistic Commute & Labor Draw:** 43-minute drive time



■ < 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 **43-minute Drive Time,** which includes **6,320 underemployed manufacturing workers.**

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### 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.*

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*The Power Team has additional, detailed workforce data available from this project to support companies' hiring plans and communities' economic development efforts.*

**Contact:** Warren Darby, VP Global Business
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Direct Dial: 803-978-7643

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