

QUALIFIED INDUSTRIAL LABOR SUMMARY

Seneca Rail Park
Oconee County, SC

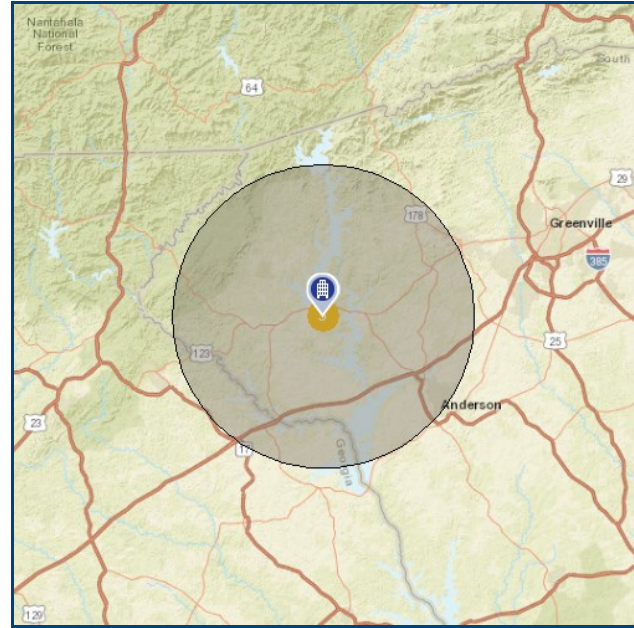
This labor data reflects a **20-Mile Radius** around the Seneca Rail Park.

BASE LABOR AVAILABILITY

Population	448,741
Projected Population Growth (5 year)	4.4%
Labor Force	206,068
Labor Force Participation Rate (among working age)	72.2%

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	16.4%	32,739	16.2%
Blue Collar Underemployment	15.8%	10,745	15.5%
White Collar & Service Underemployment	16.6%	21,993	16.5%
Production & Distribution Underemployment	20.2%	8,026	20.2%
Engineering, Science & IT Underemployment	11.1%	872	11.3%
Overall Manufacturing Underemployment	14.7%	4,181	14.5%

What does this mean?

There are an estimated 32,739 underemployed workers in this region, of which 4,181 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

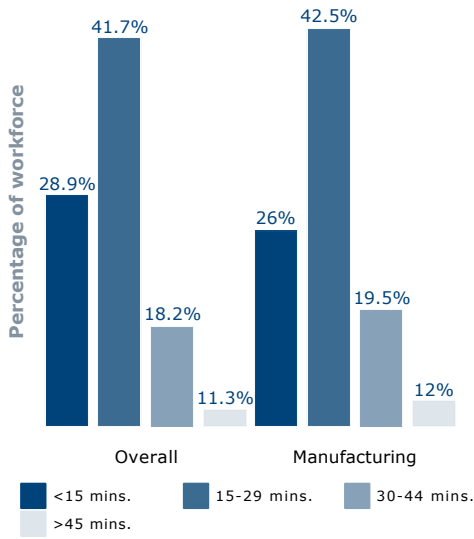
This higher underemployment rate compared to the state rate is a sign the labor market in this region may be slacker than the state's labor market overall, and thus, it may be relatively easier to staff a new operation.

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.

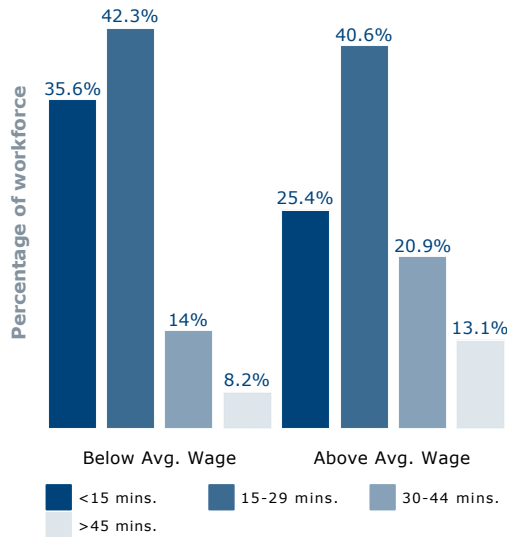
COMMUTING PATTERNS

Overall & Manufacturing



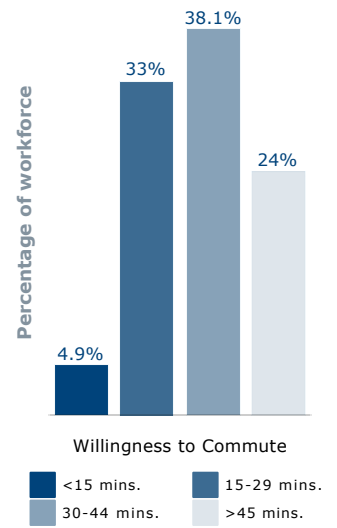
On average, workers travel 25.3 minutes in this region to get to work. Manufacturing workers travel 26.6 minutes to work on average in this region.

Low Wage Vs. High Wage



On average, workers earning relatively lower wages travel 22.2 minutes to work. Relatively higher earning workers travel 29.1 minutes for work, or 30.8% longer.

Willingness to Commute

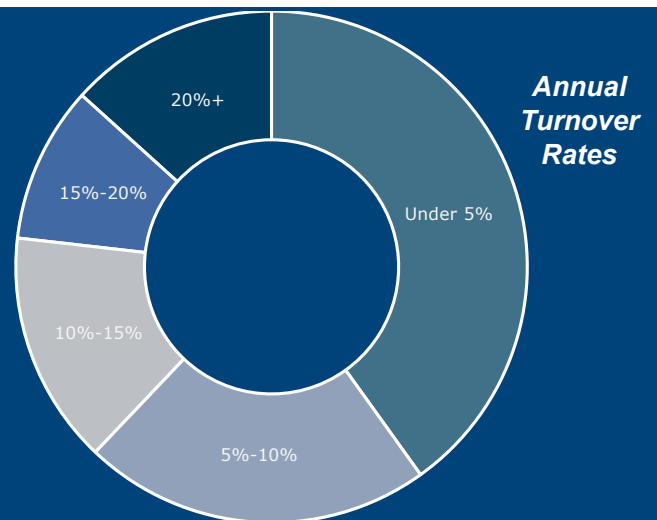


Approximately 62.1% of workers would be willing to travel more than 30 minutes for job opportunities.

EMPLOYEE TURNOVER IN MANUFACTURING

Approximately 62.1% of interviewed and surveyed manufacturers reported annual turnover of less than 10%

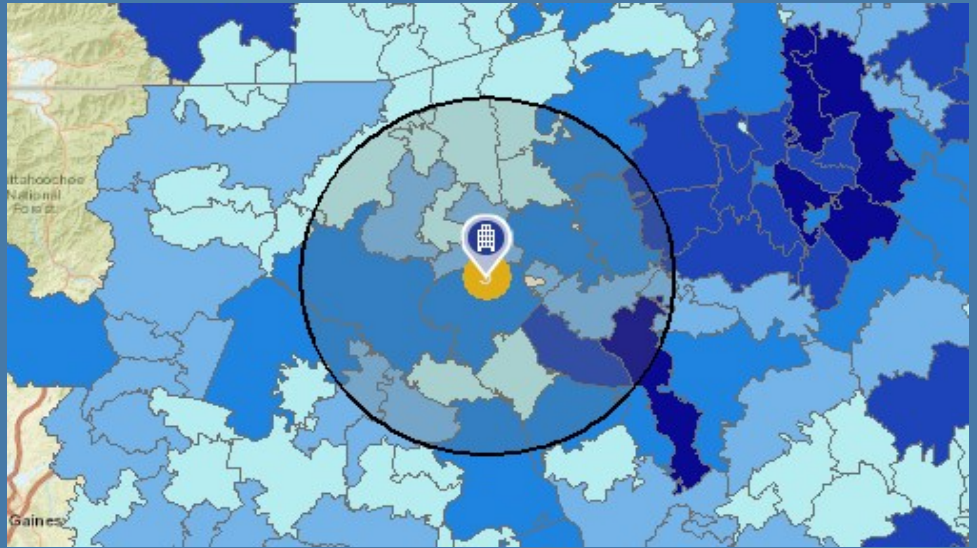
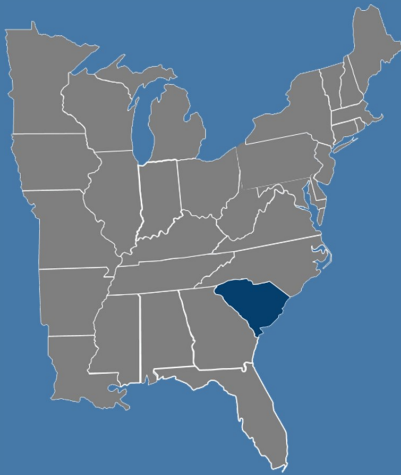
Approximately 13.3% of interviewed and surveyed manufacturers reported annual turnover of more than 20%



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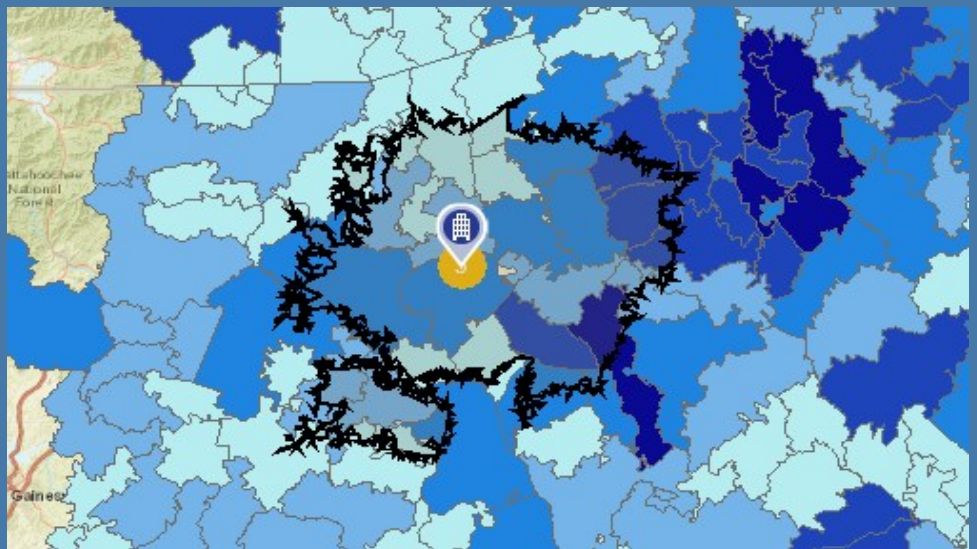
User Selected Locations & Radius: 20-Mile Radius



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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 **4,181 underemployed manufacturing workers**.

Realistic Commute & Labor Draw: 40-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 **40-minute Drive Time**, which includes **4,377 underemployed manufacturing workers**.

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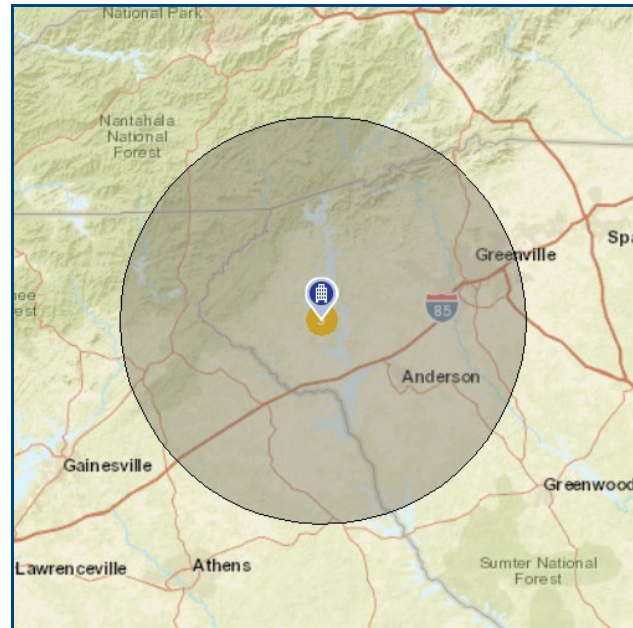
This labor data reflects a **40-Mile Radius** around the Seneca Rail Park.

BASE LABOR AVAILABILITY

Population	1,209,548
Projected Population Growth (5 year)	5.1%
Labor Force	571,200
Labor Force Participation Rate (among working age)	74.1%

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	16.1%	86,182	16.2%
Blue Collar Underemployment	15.5%	27,588	15.5%
White Collar & Service Underemployment	16.4%	58,594	16.5%
Production & Distribution Underemployment	20.2%	20,426	20.2%
Engineering, Science & IT Underemployment	11.2%	2,381	11.3%
Overall Manufacturing Underemployment	14.5%	9,771	14.5%

What does this mean?

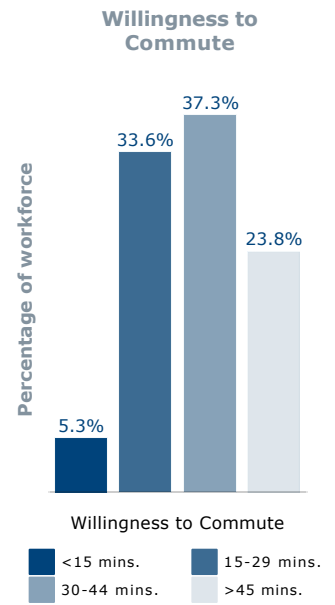
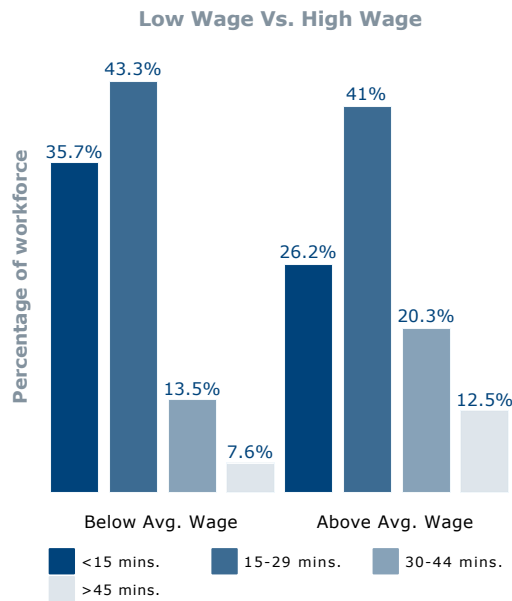
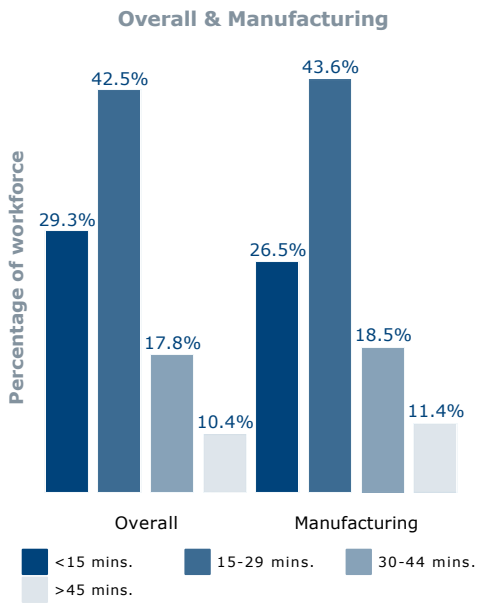
There are an estimated 86,182 underemployed workers in this region, of which 9,771 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

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 25.3 minutes in this region to get to work. Manufacturing workers travel 26.7 minutes to work on average in this region.

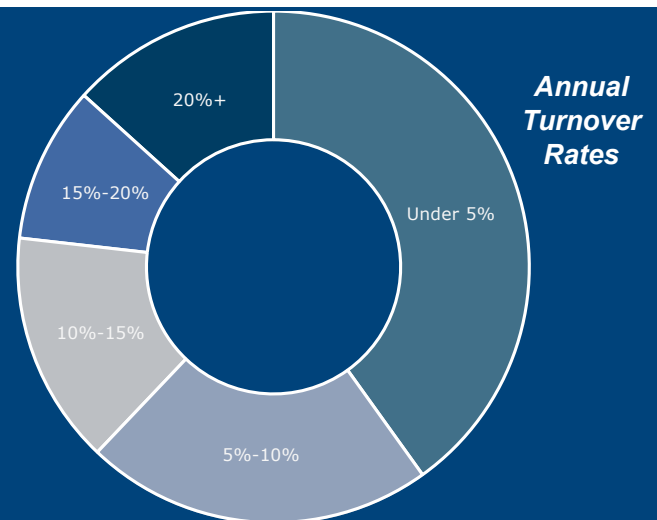
On average, workers earning relatively lower wages travel 22.1 minutes to work. Relatively higher earning workers travel 28.9 minutes for work, or 30.3% longer.

Approximately 61% of workers would be willing to travel more than 30 minutes for job opportunities.

EMPLOYEE TURNOVER IN MANUFACTURING

Approximately 62.1% of interviewed and surveyed manufacturers reported annual turnover of less than 10%

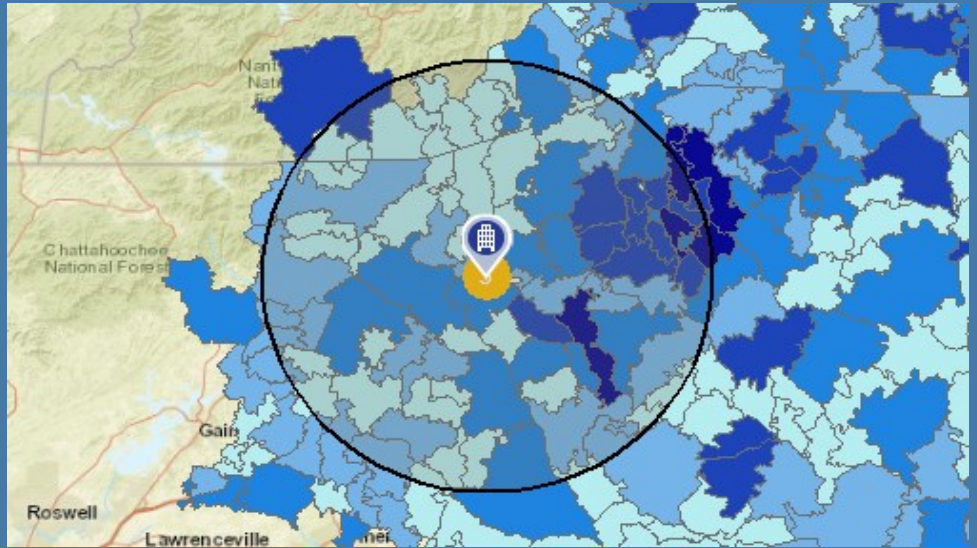
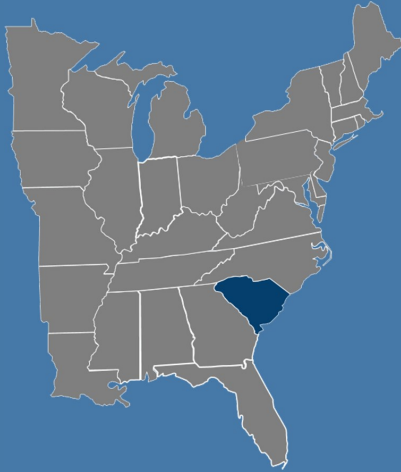
Approximately 13.3% of interviewed and surveyed manufacturers reported annual turnover of more than 20%



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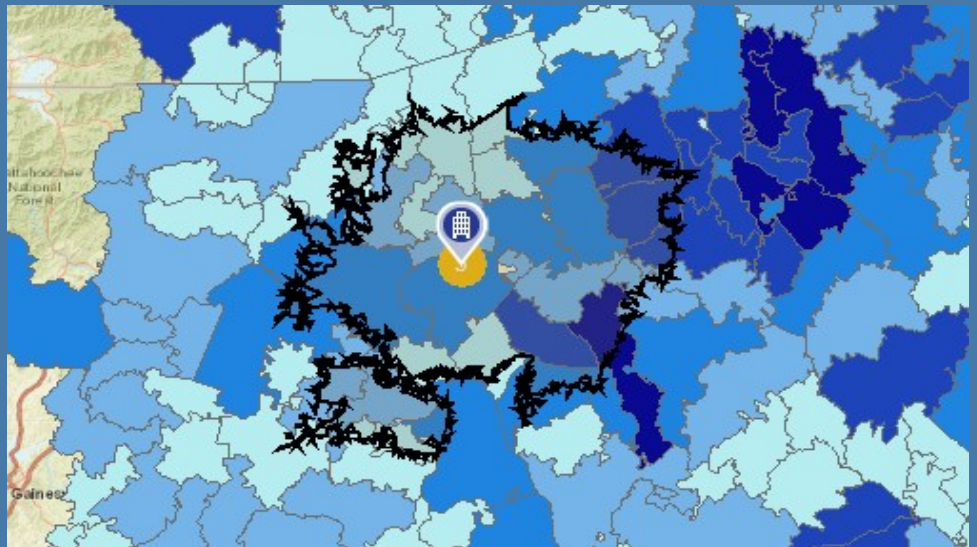
User Selected Locations & Radius: 40-Mile Radius



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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 **9,771 underemployed manufacturing workers**.

Realistic Commute & Labor Draw: 40-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 **40-minute Drive Time**, which includes **4,377 underemployed manufacturing workers**.

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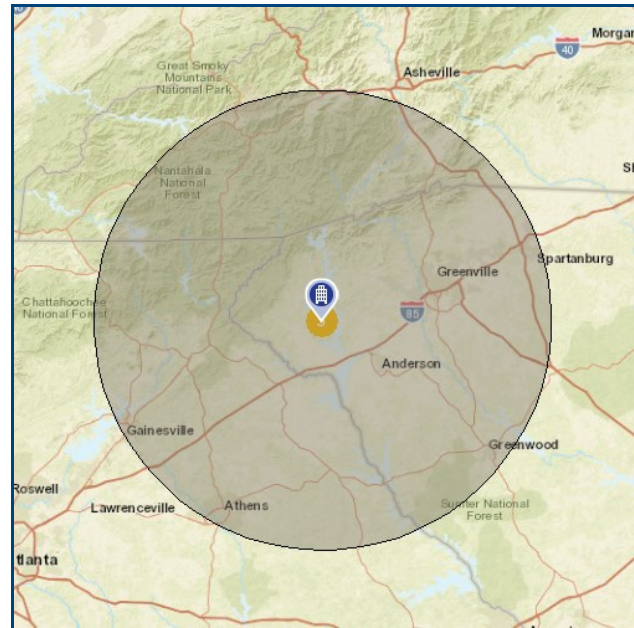
This labor data reflects a **60-Mile Radius** around the Seneca Rail Park.

BASE LABOR AVAILABILITY

Population	2,037,534
Projected Population Growth (5 year)	5.2%
Labor Force	964,048
Labor Force Participation Rate (among working age)	74.2%

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60-Mile Radius Map



AVAILABLE INDUSTRIAL WORKFORCE

	Rate in Selected Region	Estimated Available Workforce	South Carolina Rate
Overall Underemployment	16.1%	145,401	16.2%
Blue Collar Underemployment	15.4%	46,545	15.5%
White Collar & Service Underemployment	16.4%	98,856	16.5%
Production & Distribution Underemployment	20.3%	34,214	20.2%
Engineering, Science & IT Underemployment	11.2%	3,808	11.3%
Overall Manufacturing Underemployment	14.4%	17,663	14.5%

What does this mean?

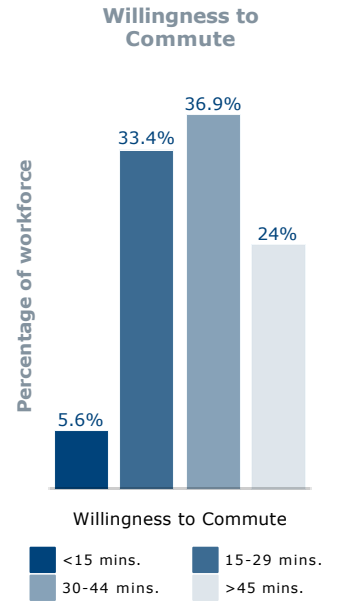
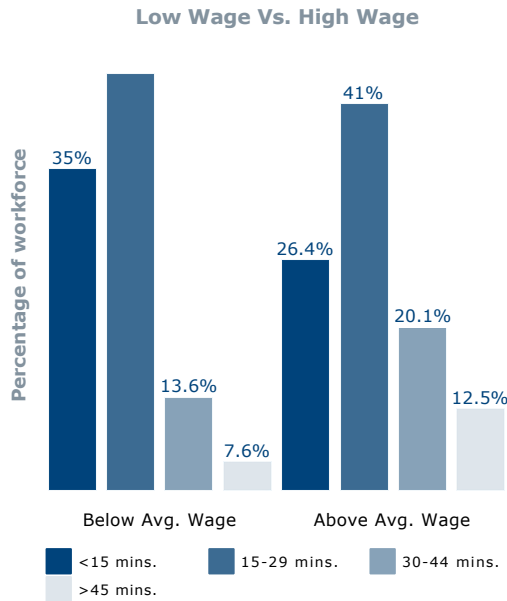
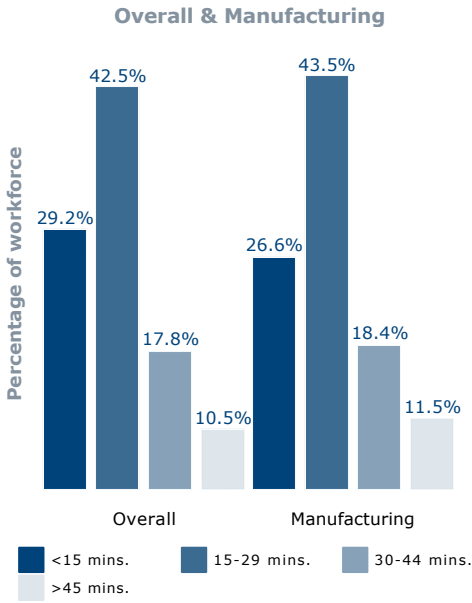
There are an estimated 145,401 underemployed workers in this region, of which 17,663 are working in manufacturing. These individuals are potentially available for work opportunities in new and expanded facilities.

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 25.3 minutes in this region to get to work. Manufacturing workers travel 26.7 minutes to work on average in this region.

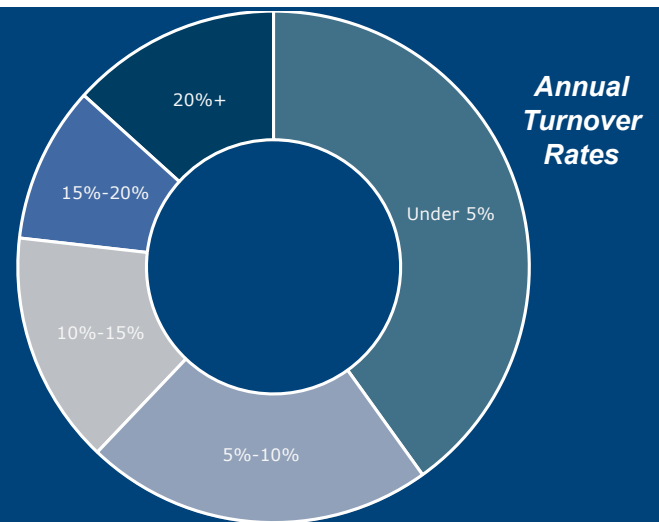
On average, workers earning relatively lower wages travel 22.1 minutes to work. Relatively higher earning workers travel 28.9 minutes for work, or 30.5% longer.

Approximately 60.9% of workers would be willing to travel more than 30 minutes for job opportunities.

EMPLOYEE TURNOVER IN MANUFACTURING

Approximately 62.1% of interviewed and surveyed manufacturers reported annual turnover of less than 10%

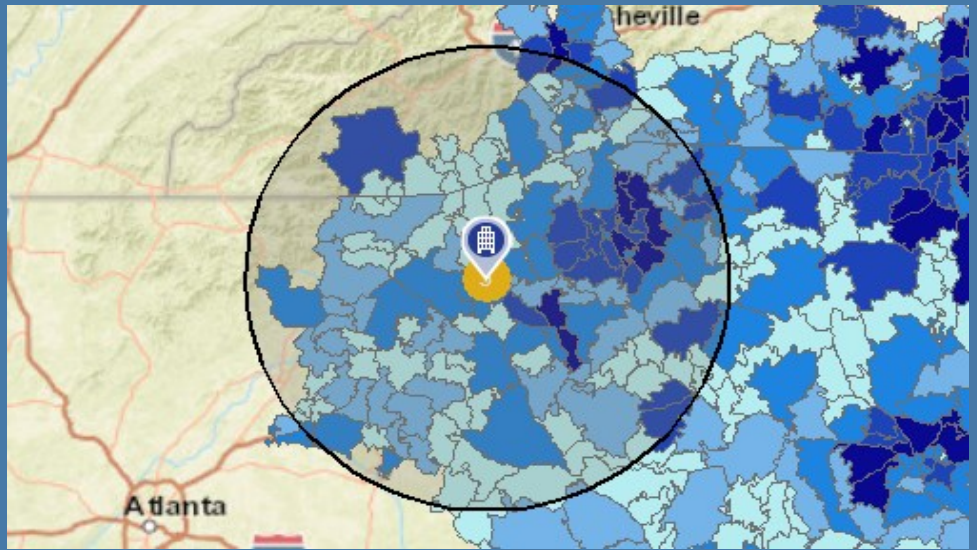
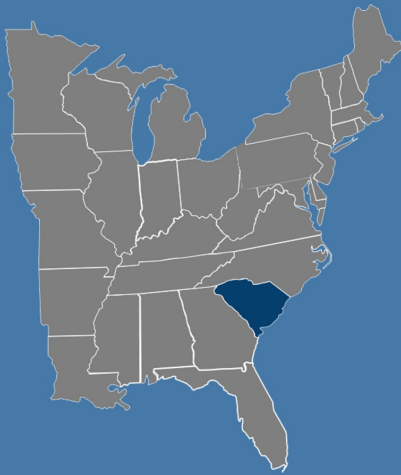
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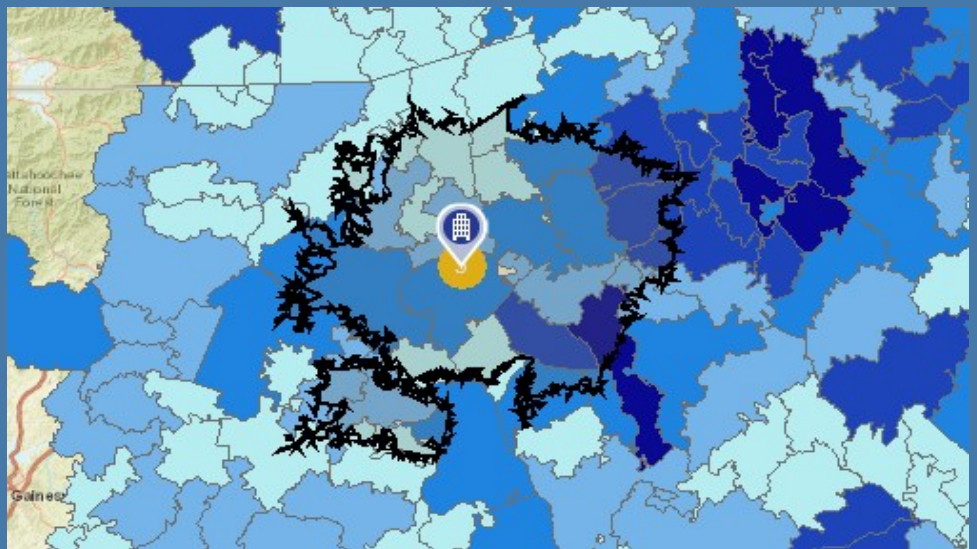
Seneca Rail Park
Oconee County, SC

User Selected Locations & Radius: 60-Mile Radius



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Realistic Commute & Labor Draw: 40-minute drive time



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 **40-minute Drive Time**, which includes **4,377 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.