

**THE
FLORENCE COUNTY, SOUTH CAROLINA
AREA
LABOR AVAILABILITY REPORT**

September, 2009

Compiled and Prepared by



THE PATHFINDERS

www.thepathfindersus.com

TABLE OF CONTENTS

I. INTRODUCTION 1

II. KEY FINDINGS 2

III. METHODOLOGY..... 3

IV. NUMBER OF AVAILABLE WORKERS..... 4

V. ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE 5

A. Desired Wages..... 5

B. Characteristics..... 7

C. Experience and Skills 10

D. Factors Affecting Job Desirability 11

VI. ASSESSMENT OF THE UNEMPLOYED WORKFORCE 12

A. Individuals Who Would Consider Re-entering the Workforce.... 13

B. Individuals Actively Seeking Work..... 17

VII. NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE..... 21

A. Desired Wages 21

B. Experience 22

C. Skills 25

VIII. EMPLOYERS’ RATINGS OF THE WORKFORCE..... 28



INTRODUCTION

The Pathfinders has employed its many years of experience in workforce assessments for corporate site-selection clients and civilian workforce assessments for the Department of Defense in locations that faced military base closures to produce this evaluation of the Florence County area workforce. In site-selection projects, the question that most often drives the search is whether the candidate location has the workforce needed for a new or expanding operation; consequently, an analysis of an area's workforce became a key component of site searches conducted by The Pathfinders. Senior human resources executives from among corporate clients assisted in refining the methodology and report format.

While unemployed workers are a source considered in hiring, companies typically also staff a new operation with individuals who are working but who desire better jobs and who appear to possess the skills, education, and experience to qualify them for those better jobs. **By that definition**, those individuals can be considered "underemployed" and are identified as such in this report.

The Pathfinders was retained to quantify the extent to which both unemployment and underemployment exist in the Florence County area. This report also represents the objective and professional view of The Pathfinders with regard to workforce quality, availability, costs, experience and skills that a new or expanding employer can expect in the Florence County region.

The information presented in this report has been developed independently of the client, and the client has not influenced the findings.



KEY FINDINGS

- The Florence County area, referred to in this report as the “labor shed”, has a household population of approximately 530,800; a civilian labor force of approximately 259,300; and a pool of approximately 36,900 unemployed persons who are actively seeking work.
- The results of this survey indicate that a new or expanding employer will be able to attract employees from an additional pool of about 59,200 underemployed workers.
- The desired pay rates of the underemployed workers are reasonable when compared to their existing pay rates. The median current pay rate of the underemployed workers is \$14.19 per hour, and their median desired pay rate is \$15.50 per hour.
- The median desired pay rate of the unemployed workers who are actively seeking work is \$10.48 per hour.
- Survey results indicate 5% of the underemployed and 12% of unemployed, actively seeking work individuals have less than a high school degree.
- In addition to the underemployed and those unemployed individuals who are actively seeking work, survey results indicate approximately 10,200 unemployed individuals in the labor shed who are not actively seeking work but would consider re-entering the workforce.
- In total, the Florence County area has approximately 106,300 available workers for new or expanding businesses.



METHODOLOGY

The first step in assessing the workforce of the Florence County area was to determine the boundaries of the area to be assessed. To accomplish this task, The Pathfinders applied the same reasoning that would be used during a site search for a corporate client considering the area as a potential location. The Florence County survey area includes those locations from which workers might be drawn to a new employer and is referred to in this report as the “labor shed”. This labor shed consists of Florence, Darlington, Lee, Sumter, Clarendon, Williamsburg, Marion and Dillon Counties and portions of Horry and Marlboro Counties in South Carolina.

Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the Florence County region. Those individuals were proportionally stratified across age, household income, and zip codes. The purpose of these surveys was to ascertain availability for work with a new employer; determine desired pay rates; and, collect information on such factors as age, education, commuting patterns, experience, and skills.

The data obtained as a result of those interviews enabled The Pathfinders to apply and employ a proprietary methodology that accurately determined the existence of underemployment and the quality and characteristics of both the underemployed and unemployed workers in the area. Further, The Pathfinders applied a proprietary process to the analysis of the data to correct for invalid responses. For example, those persons indicating they would take a new job but also indicating the desire for increased or decreased pay that is unreasonable are not included in the results.

It is important to note that companies making location decisions based upon these surveys have reported that when staffing actually began, the numbers reported by The Pathfinders proved to be accurate.



NUMBER OF AVAILABLE WORKERS

The Florence County Area Labor Shed

The Florence County area labor shed has a household population of approximately 530,800. The civilian labor force numbers approximately 259,300, and the labor shed contains approximately 36,900 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 59,200 workers can be defined as underemployed: those individuals who are currently working but would take a better job if offered by a new or existing employer and who appear to possess the skills, education, and experience to qualify them to do so. Another 10,200 individuals would consider re-entering the workforce. Together with the unemployed, actively seeking work individuals, the Florence County area has approximately 106,300 available workers for new or existing employers.

TOTAL AVAILABLE WORKERS

Number of underemployed workers	59,200
Number of unemployed, actively seeking work individuals	36,900
Number of unemployed individuals who are considering re-entering the workforce	10,200
Total Number of Workers Available for Employers*	106,300

* The reader is cautioned that, while the number of workers identified in the region, as well as their skills, experience, education, and costs, is accurate, all of those individuals may not be acceptable candidates for an employer. Their previous work records, stability, integrity, intelligence, appearance, and other factors are not considered in this report.



ASSESSMENT OF THE UNDEREMPLOYED WORKFORCE

The Florence County Area Labor Shed

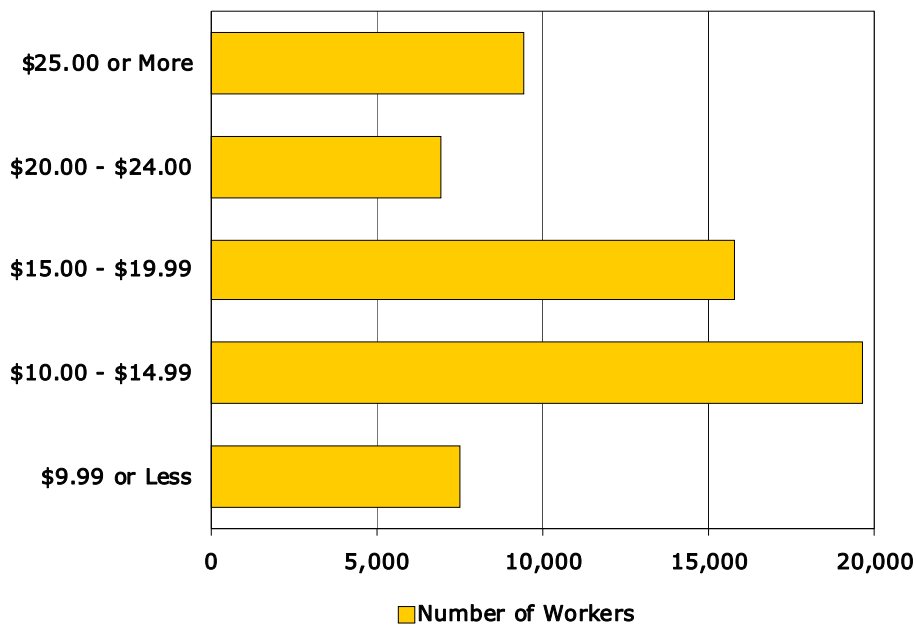
The 59,200 underemployed workers identified in this report might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The following charts represent the desired pay rates of the underemployed individuals in the labor shed. Desired wages are shown by specific rates, range and percentiles.

NUMBER OF UNDEREMPLOYED WORKERS AVAILABLE AT SPECIFIC WAGE RATES PER HOUR (rounded)

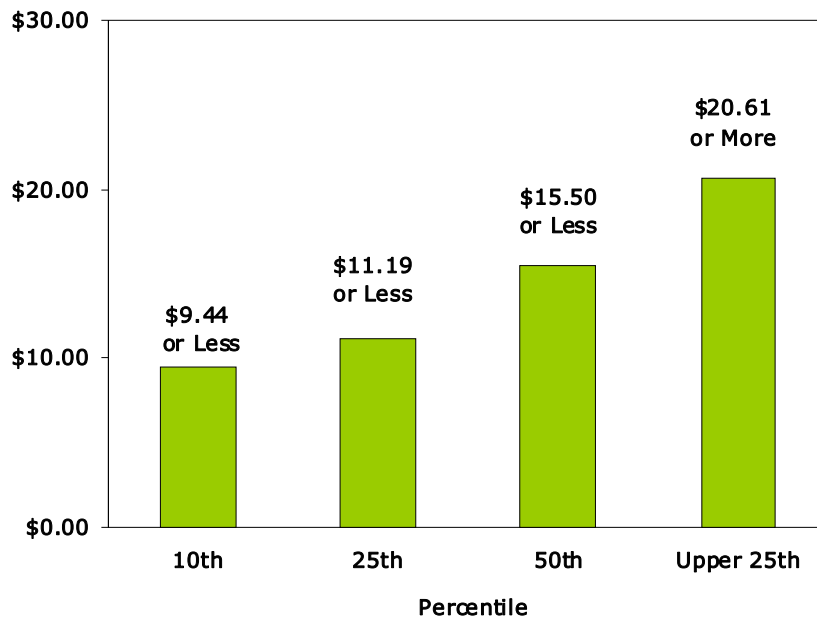
Desired Pay Rate	Number Available
\$7.99 or Less	2,500
\$8.00 - \$9.99	5,000
\$10.00 - \$11.99	10,300
\$12.00 - \$13.99	6,500
\$14.00 - \$15.99	7,800
\$16.00 - \$17.99	6,800
\$18.00 - \$19.99	4,000
\$20.00 - \$21.99	2,800
\$22.00 - \$23.99	2,200
\$24.00 - \$25.99	4,100
\$26.00 - \$27.99	1,200
\$28.00 - \$29.99	2,100
\$30.00 - \$31.99	200
\$32.00 or More	3,700



DESIRED WAGE RATES PER HOUR BY RANGE 59,200 Underemployed Workers



DESIRED WAGE RATES PER HOUR BY PERCENTILE 59,200 Underemployed Workers



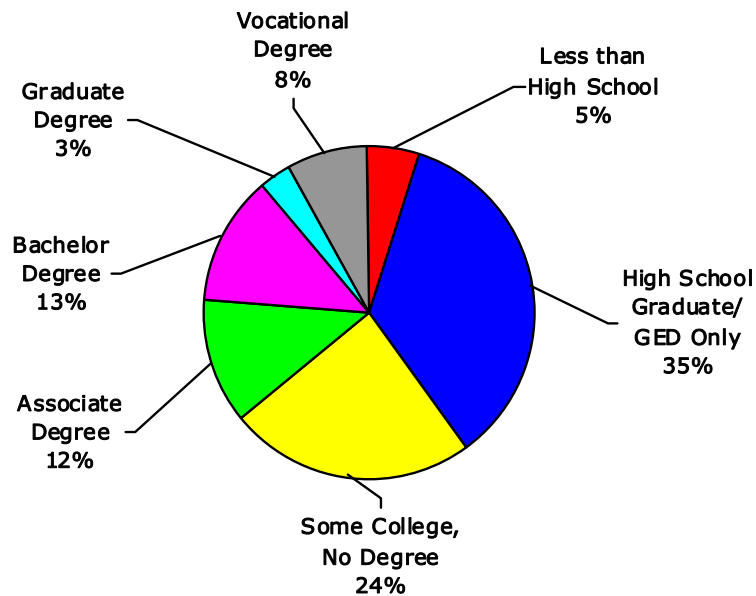
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

The Florence County Area Labor Shed

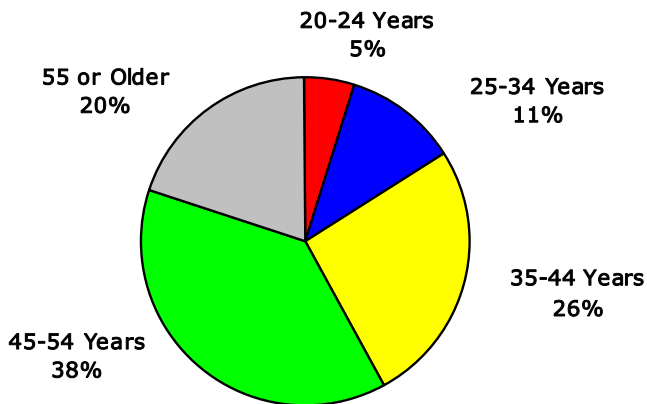
59,200 Underemployed Workers

The following charts provide information on various characteristics of the underemployed workers in the labor shed. As these data relate solely to those individuals in the labor shed who are underemployed, they will vary from data representative of the population and civilian labor force as a whole.

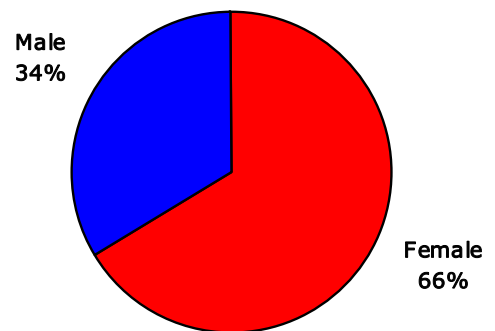
EDUCATION



AGE

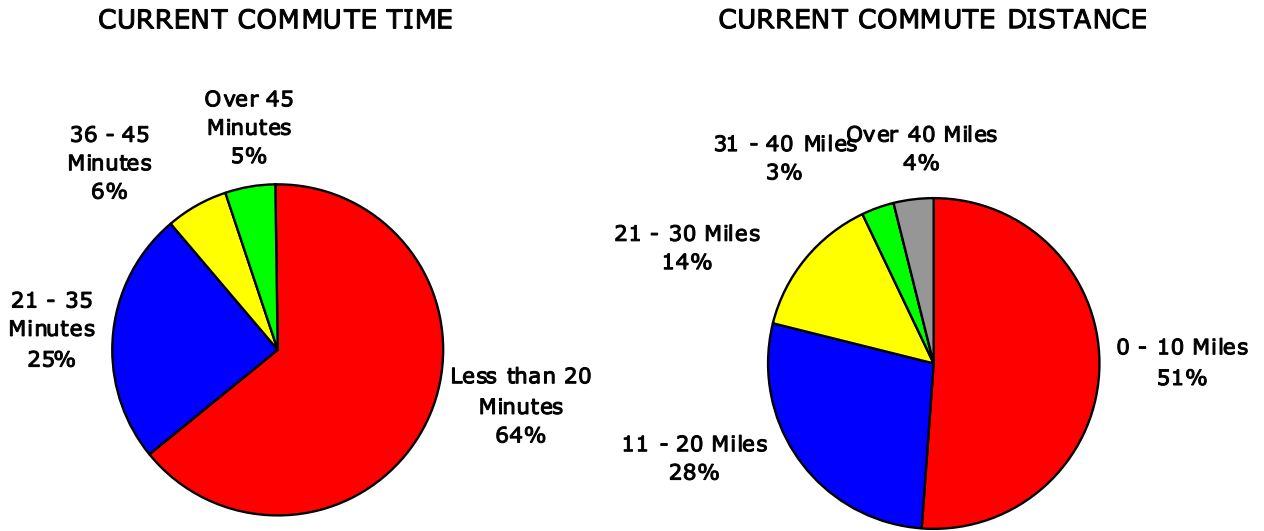


GENDER



CHARACTERISTICS OF UNDEREMPLOYED WORKERS

59,200 Underemployed Workers



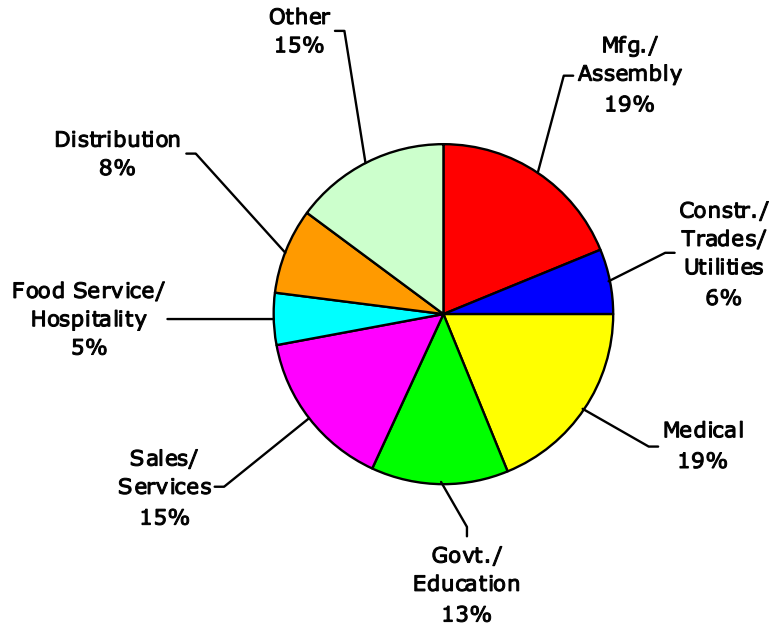
LENGTH OF TIME IN CURRENT JOB



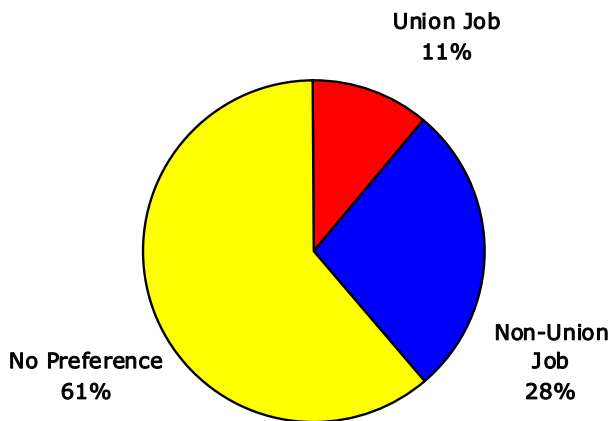
CHARACTERISTICS OF UNDEREMPLOYED WORKERS

59,200 Underemployed Workers

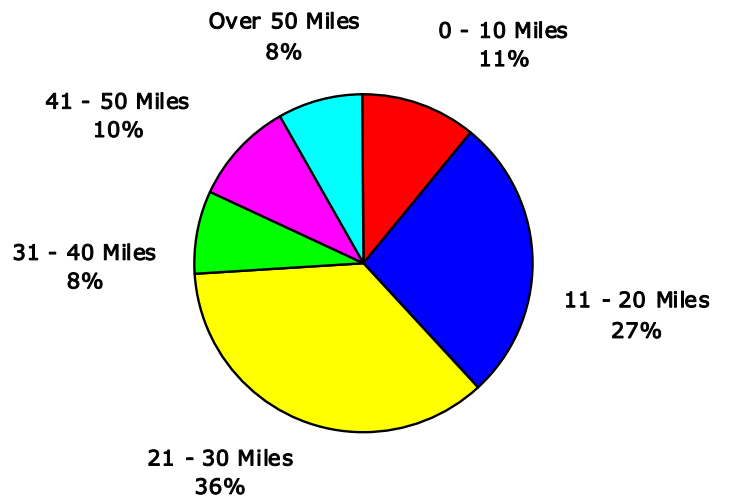
CURRENT AREA OF EMPLOYMENT



UNION PREFERENCE



MILES WILLING TO COMMUTE



EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS

59,200 Underemployed Workers

Experience Category	Number of Workers (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	37,300	63%	11
Office Operations	36,100	61%	10
Manufacturing/Assembly/Fabrication	33,200	56%	11
Warehouse/Distribution/Transportation	28,400	48%	8
Maintenance/Installation/Repair	18,900	32%	10
Information Technology	16,600	28%	8
Medical/Health Sciences	16,000	27%	10
Call Center	10,700	18%	7

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.

Skills	Number of Workers (Rounded)	Percentage of Total
Office Operations	36,700	62%
Warehouse/Materials Handling	34,300	58%
Manufacturing/Assembly/Fabrication	32,000	54%
Information Technology	21,900	37%
Technician/Quality Assurance	19,500	33%
Medical/Health Sciences	18,900	32%
Maintenance/Installation/Repair	18,400	31%
Electronics/Engineering	10,700	18%



FACTORS AFFECTING JOB DESIRABILITY

59,200 Underemployed Workers

In an effort to identify those factors most important to the Florence County area's underemployed workers relative to consideration of an employer's desirability, the surveyed individuals were asked to rate the following job factors on a scale of 1 to 5, with 5 being "extremely important" and 1 being "not important". The table below presents the ratings for each factor.

Factor	5 Extremely Important	4 Very Important	3 Important	2 Somewhat Important	1 Not Important
Financial Stability of the Company	69%	23%	6%	1%	1%
Insurance Benefits	62%	25%	11%	1%	1%
Retirement Benefits	61%	28%	9%	1%	1%
Salary	61%	25%	11%	2%	1%
Opportunity for Advancement	50%	34%	14%	1%	1%
Physical Working Environment	43%	34%	21%	1%	1%
Paid Training Programs	40%	39%	17%	3%	1%
Location	36%	30%	27%	5%	2%

As shown above, the underemployed workers in the Florence County labor shed rated financial stability of the company and insurance benefits as the two factors most important to them in consideration of a job change. This does not mean that the remaining factors are unimportant to the underemployed workers.



ASSESSMENT OF THE UNEMPLOYED WORKFORCE

The Florence County Area Labor Shed

This report documents two groups of unemployed individuals in the Florence County area labor shed who would be available workers for a new or expanding business. The groups are classified as:

- Individuals who are actively seeking work
- Individuals who are considering re-entering the workforce

Published statistics document 36,900 unemployed workers in the labor shed who are actively seeking work. This number could possibly be higher due to individuals looking for work who are not on the roles of the state unemployment agencies. Survey results suggest that an additional 10,200 people, who are not currently employed or actively seeking work, would consider re-entering the workforce.

In total, the labor shed has approximately 47,100 unemployed individuals who would be considered potential workers for a new or expanding operation.

UNEMPLOYED INDIVIDUALS

Number of unemployed, actively seeking work individuals	36,900
Number of unemployed individuals who would considering re-entering the workforce	10,200

Total Number of Unemployed Individuals Available for Employers	47,100

The determinations for these two segments of the workforce have a larger statistical variance than that for the underemployed.

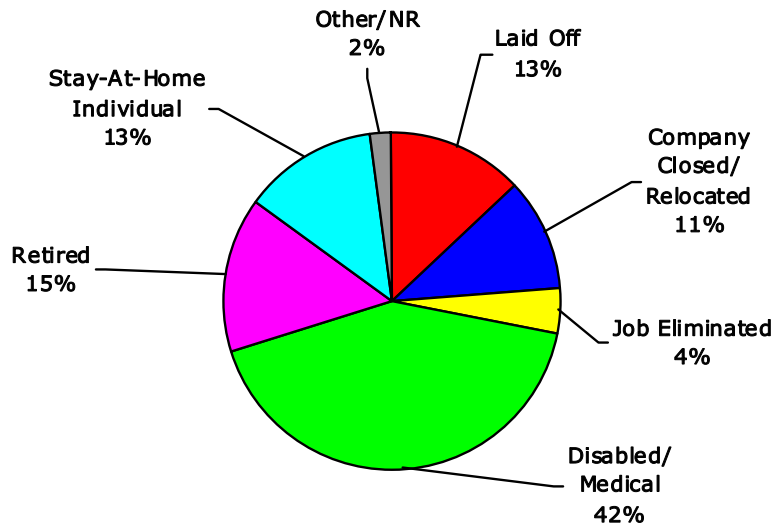


ASSESSMENT OF INDIVIDUALS WHO WOULD CONSIDER RE-ENTERING THE WORKFORCE

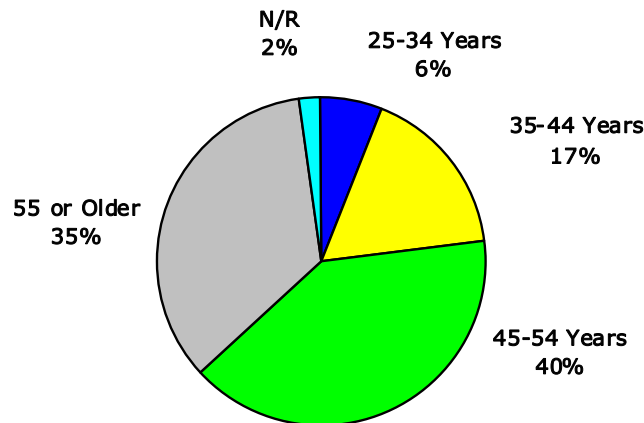
The Florence County Area Labor Shed

The following charts provide information on that segment of unemployed individuals in the labor shed who would consider re-entering the workforce. As these data relate solely to those individuals in the labor shed who are unemployed, they will vary from data representative of the population and civilian labor force as a whole.

REASONS FOR UNEMPLOYMENT

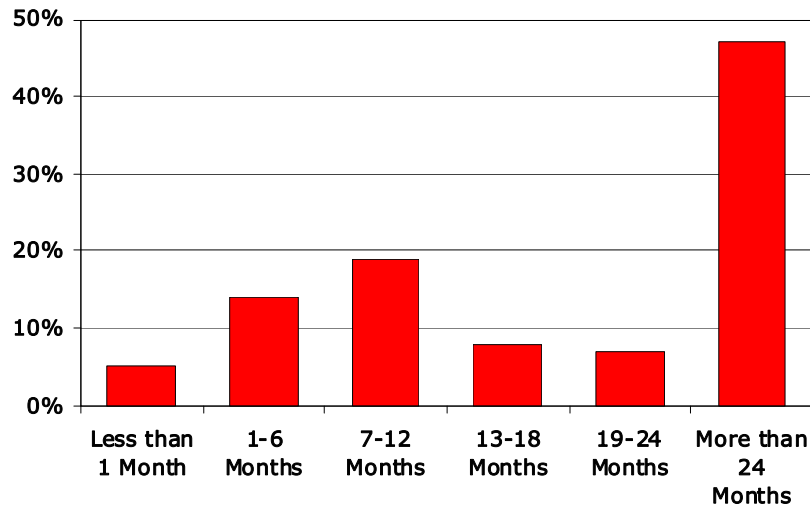


AGE

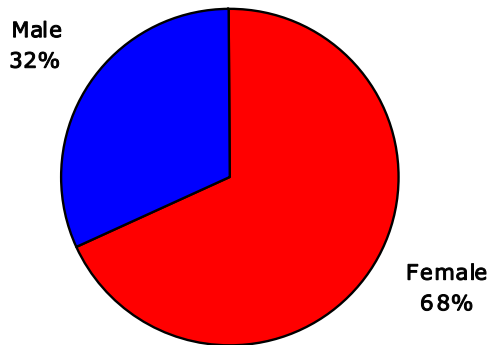


**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
10,200 Potential Workers**

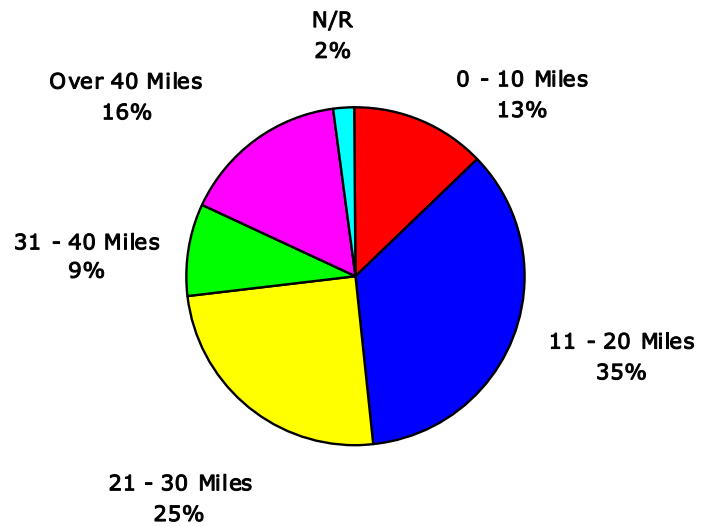
LENGTH OF TIME UNEMPLOYED



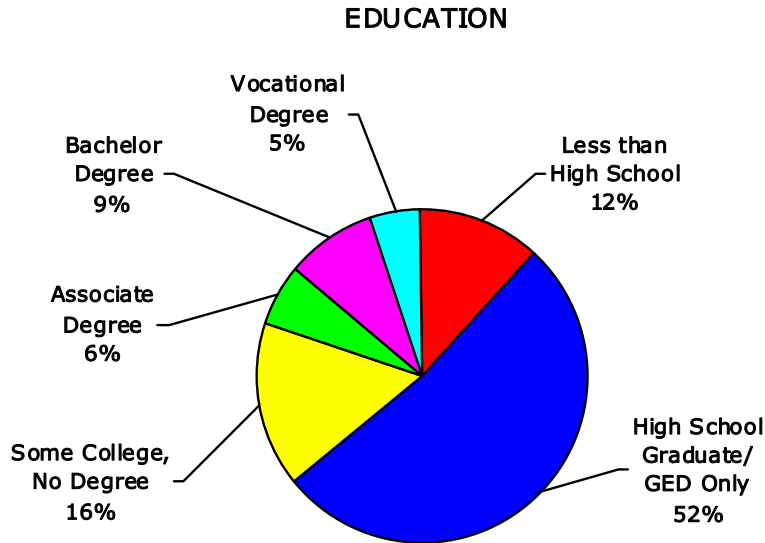
GENDER



MILES WILLING TO COMMUTE



**CHARACTERISTICS OF INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
10,200 Potential Workers**



- The median desired pay rate of the unemployed individuals who would consider re-entering the workforce is \$11.40 per hour.

- The largest category of most recent employment for the unemployed individuals who would consider re-entering the workforce is manufacturing.

- The two factors most important to the unemployed individuals who would consider re-entering the workforce relative to consideration of a potential employer are insurance benefits and financial stability of the company.

- 10% of the unemployed individuals who would consider re-entering the workforce would prefer a union job; 15% a non-union job; and, 75% have no preference.

**EXPERIENCE AND SKILLS – INDIVIDUALS WHO
WOULD CONSIDER RE-ENTERING THE WORKFORCE
10,200 Potential Workers**

Experience Category	Number of Individuals (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	5,500	54%	9
Office Operations	5,000	49%	6
Warehouse/Distribution/Transportation	4,500	44%	8
Manufacturing/Assembly/Fabrication	4,300	42%	9
Maintenance/Installation/Repair	3,100	30%	13
Medical/Health Sciences	2,600	25%	7
Information Technology	2,400	24%	5
Call Center	1,500	15%	4

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.

Skills	Number of Individuals (Rounded)	Percentage of Total
Office Operations	4,900	48%
Manufacturing/Assembly/Fabrication	4,600	45%
Warehouse/Materials Handling	4,200	41%
Maintenance/Installation/Repair	3,000	29%
Information Technology	2,900	28%
Medical/Health Sciences	2,600	25%
Technician/Quality Assurance	1,500	15%
Electronics/Engineering	1,300	13%

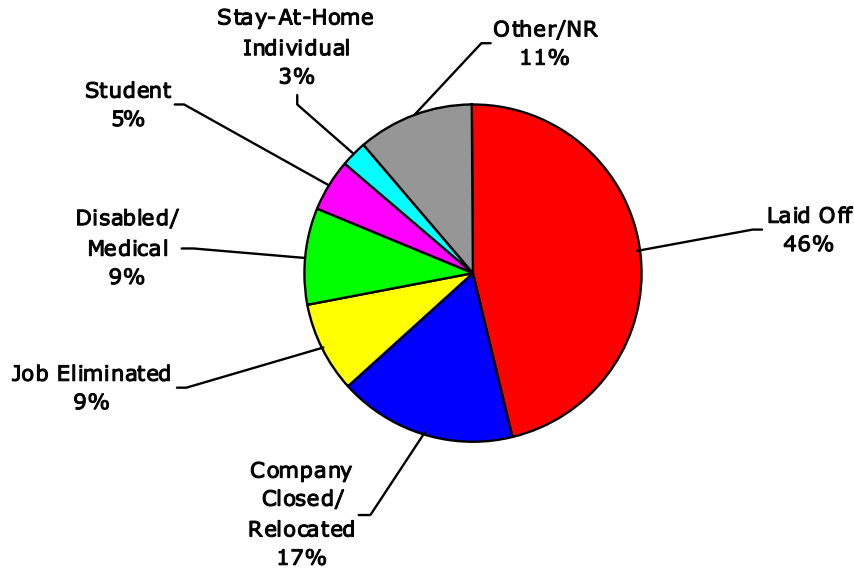


CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

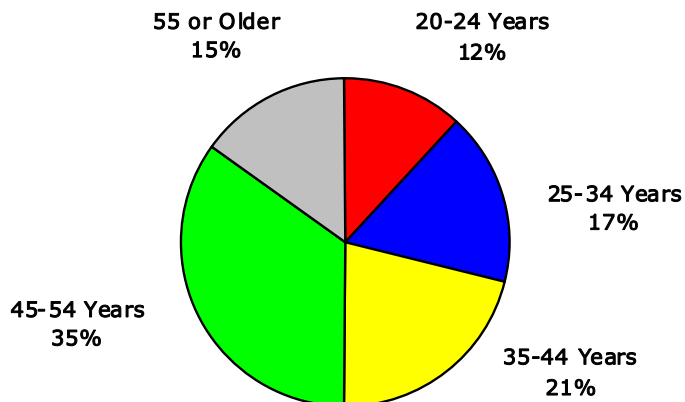
36,900 Workers

According to survey results, the following charts provide information on those unemployed workers in the labor shed who are actively seeking work. **As these data relate solely to those individuals in the labor shed who are unemployed, they will vary from data representative of the population and civilian labor force as a whole.**

REASONS FOR UNEMPLOYMENT



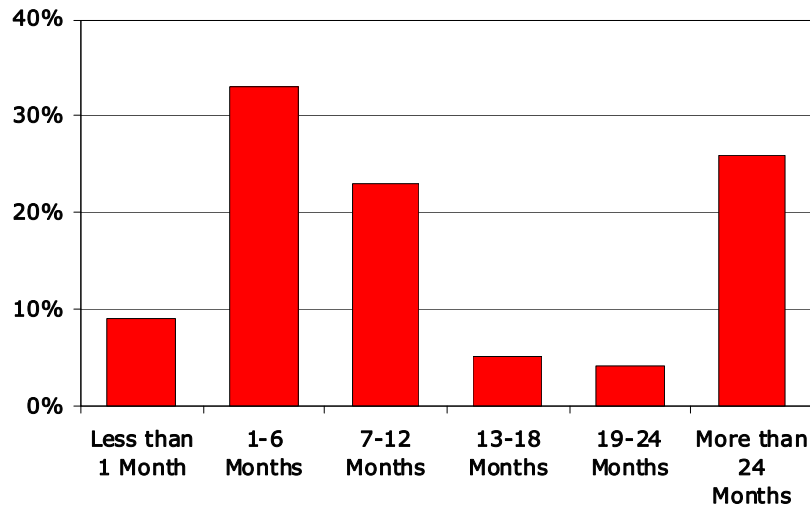
AGE



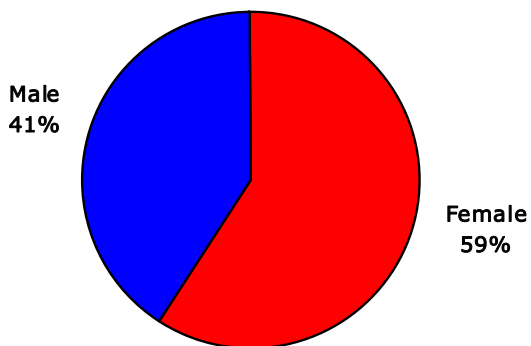
CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

36,900 Workers

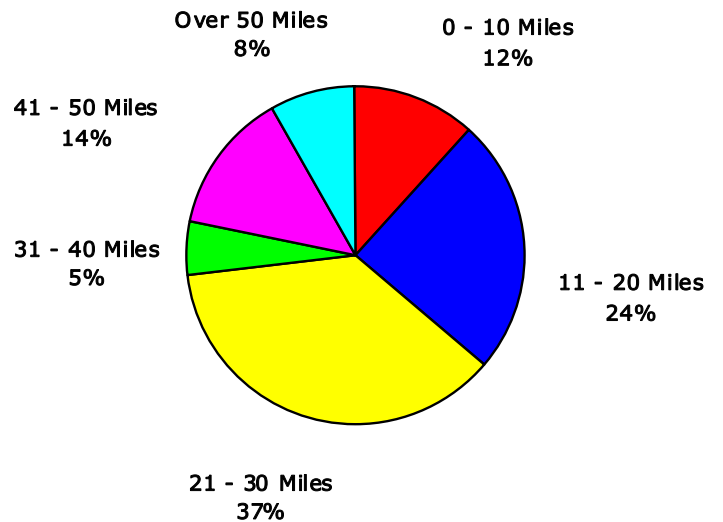
LENGTH OF TIME UNEMPLOYED



GENDER

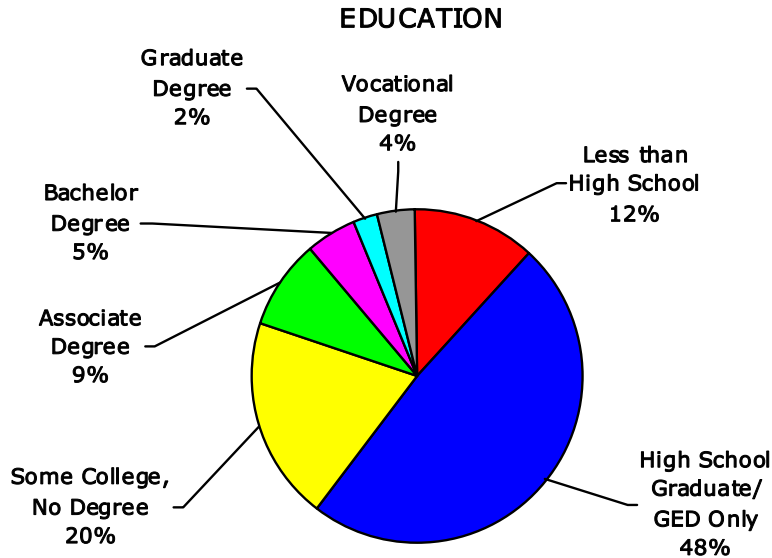


MILES WILLING TO COMMUTE



**CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE
ACTIVELY SEEKING WORK**

36,900 Workers



- The median most recent pay rate of the unemployed workers who are actively seeking work is \$11.19 per hour. The median desired pay rate of these individuals is \$10.48 per hour.

- The largest category of most recent employment for the unemployed individuals who are actively seeking work is manufacturing.

- The two factors most important to the unemployed individuals who are actively seeking work relative to consideration of a potential employer are retirement benefits and financial stability of the company.

- 9% of the unemployed individuals who are actively seeking work would prefer a union job; 13% a non-union job; and, 78% have no preference.



EXPERIENCE AND SKILLS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

36,900 Workers

Experience Category	Number of Workers (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	22,500	61%	8
Manufacturing/Assembly/Fabrication	21,000	57%	7
Warehouse/Distribution/Transportation	16,200	44%	6
Office Operations	14,000	38%	7
Maintenance/Installation/Repair	11,400	31%	11
Information Technology	8,500	23%	9
Medical/Health Sciences	7,700	21%	6
Call Center	5,900	16%	5

The similarities between the experience and skills categories are designed to ensure inclusiveness considering the multitude of tasks and job titles present in most business, government and institutional operations. It should be noted that individuals polled normally have experience and/or skills in multiple categories.

Skills	Number of Workers (Rounded)	Percentage of Total
Manufacturing/Assembly/Fabrication	20,700	56%
Warehouse/Materials Handling	20,300	55%
Office Operations	15,900	43%
Maintenance/Installation/Repair	12,900	35%
Information Technology	11,800	32%
Medical/Health Sciences	8,100	22%
Technician/Quality Assurance	7,400	20%
Electronics/Engineering	4,800	13%

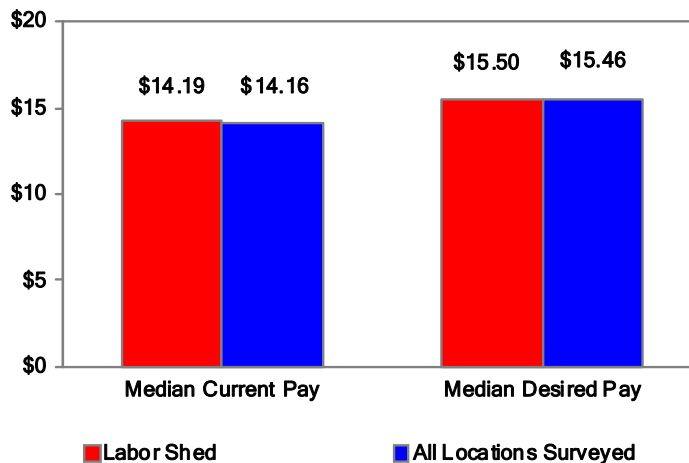


NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

This section of the report provides comparisons of the pay rates, experience and skills of the labor shed’s underemployed workforce with the underemployed workforces in other areas previously surveyed by The Pathfinders. A prospect company considering the Florence County region as a location will judge its workforce on a comparative basis. The comparative data for other locations used in the following charts reflect information accumulated over the past eighteen months. The Pathfinders maintains a continuing database of over 700 surveyed counties and communities and more than 30 million workers. In the charts, the Florence County region is referred to as “labor shed”.

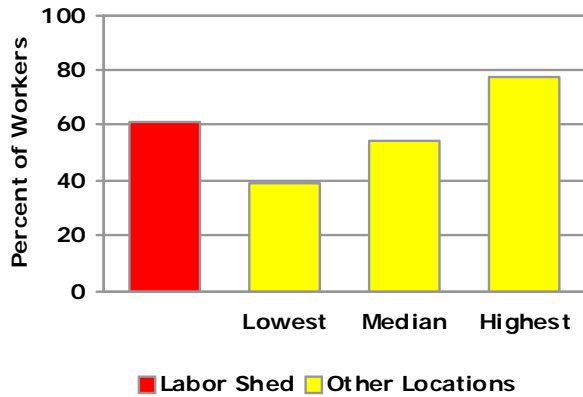
The chart below illustrates the median current and desired wages of the underemployed workers in the Florence County labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed workers over the past eighteen months is \$14.16 per hour, and the median desired pay of these workers is \$15.46 per hour. As shown, survey results indicate that the Florence County region’s underemployed workers have similar pay rates in both median current pay and desired pay as other locations surveyed.

COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

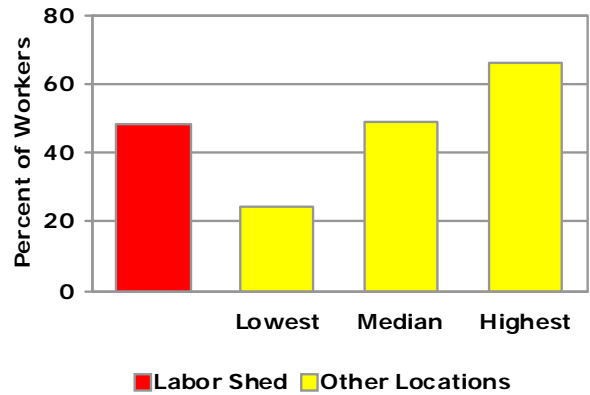


**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months**

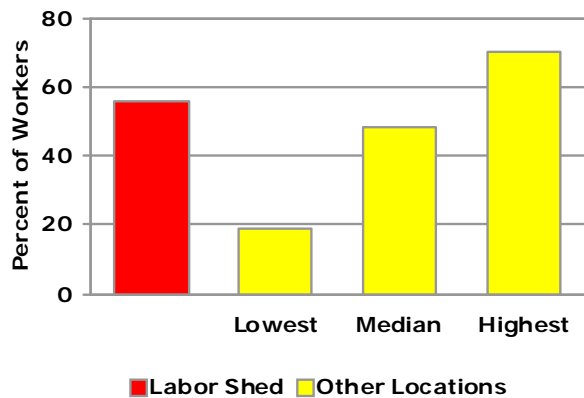
OFFICE



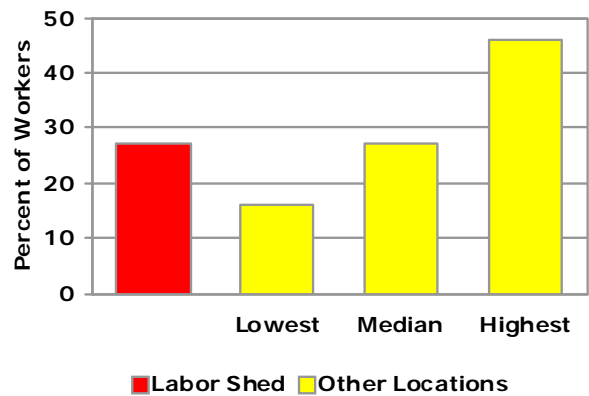
**WAREHOUSE / DISTRIBUTION /
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /
FABRICATION**



**MEDICAL /
HEALTH SCIENCES**



**COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months**

**MAINTENANCE /
INSTALLATION / REPAIR**



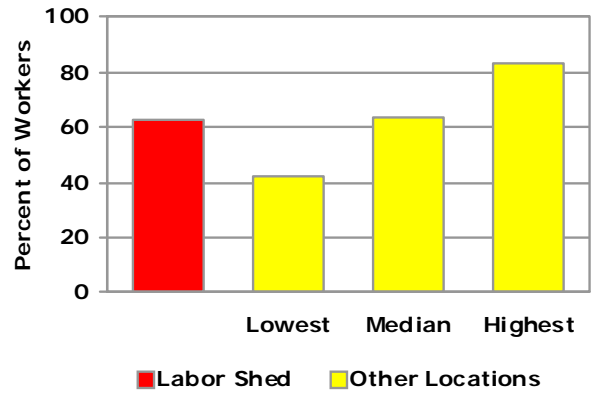
CALL CENTER



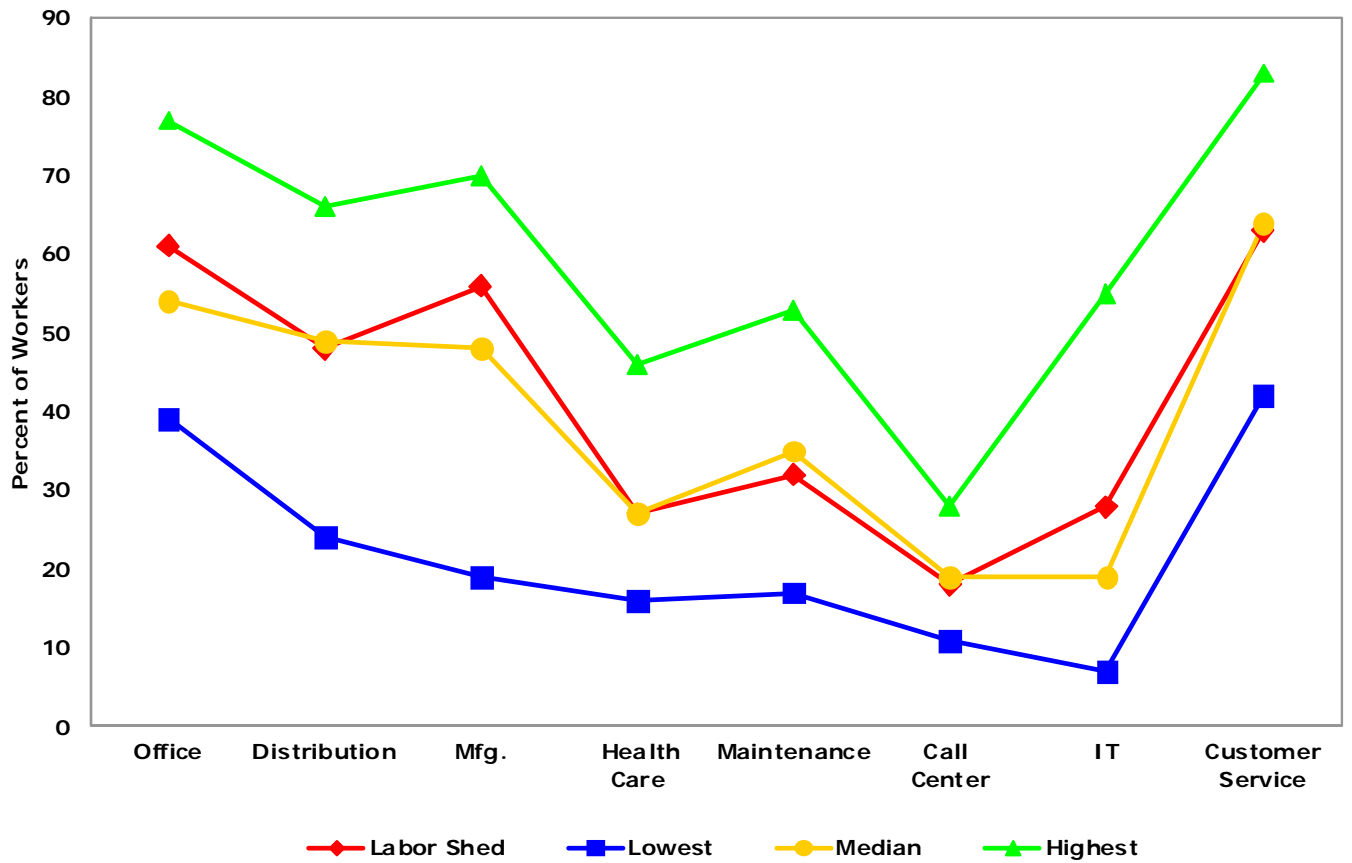
INFORMATION TECHNOLOGY



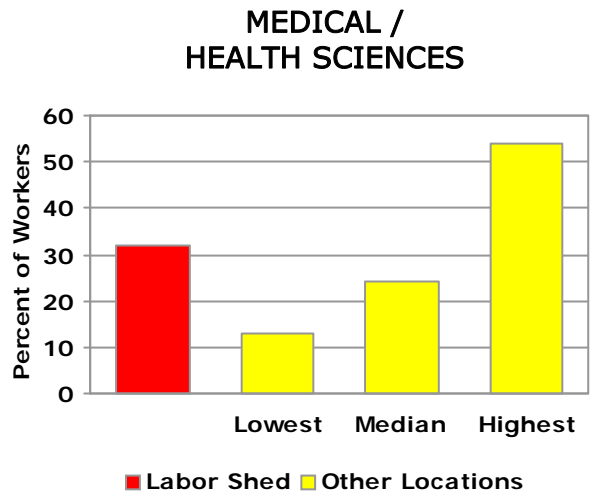
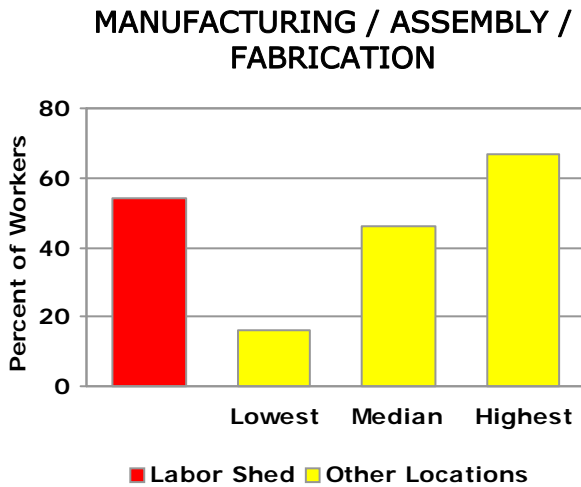
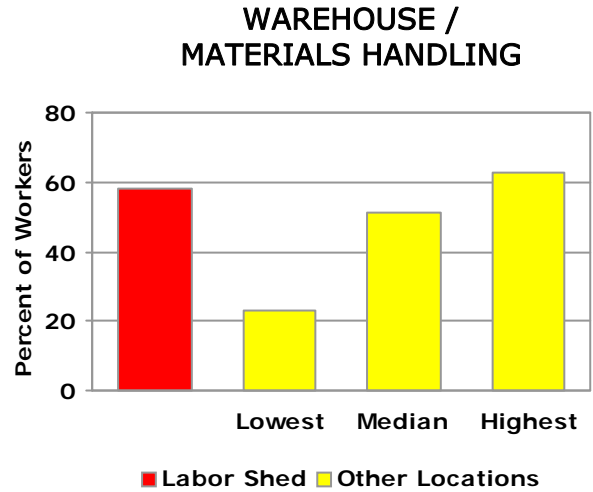
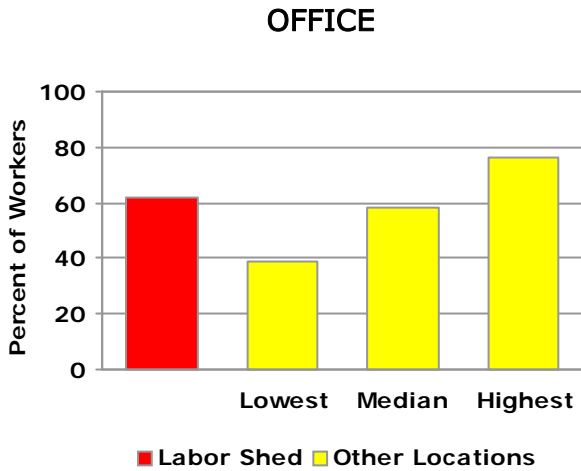
CUSTOMER SERVICE



SUMMARY COMPARISON OF EXPERIENCE
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months

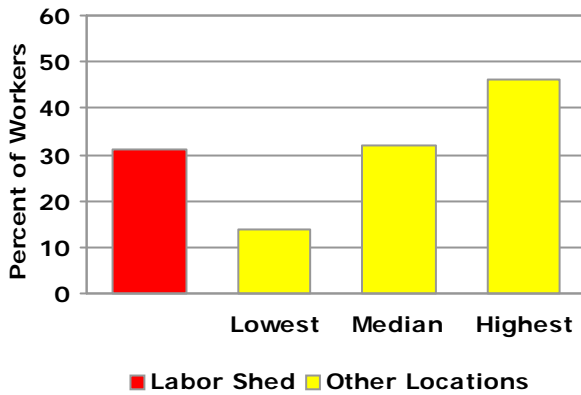


**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months**



**COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months**

**MAINTENANCE /
INSTALLATION / REPAIR**



**TECHNICIAN / QUALITY
ASSURANCE**



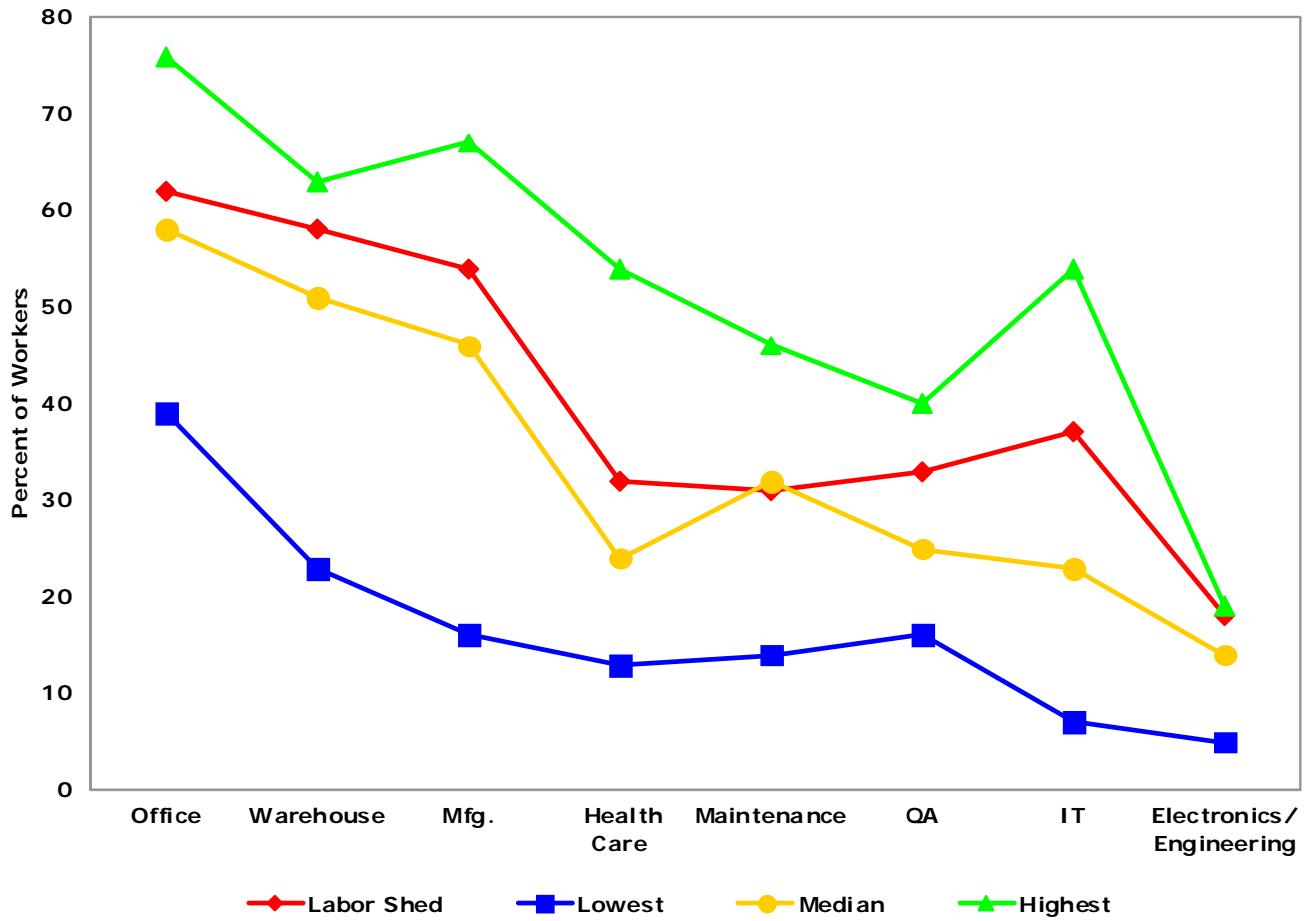
INFORMATION TECHNOLOGY



**ELECTRONICS /
ENGINEERING**



SUMMARY COMPARISON OF SKILLS
UNDEREMPLOYED WORKERS
The Florence County Area /
Locations Surveyed Over the Past 18 Months



EMPLOYERS' VIEWS OF THE THE NESAS AREA TOTAL WORKFORCE

In developing a profile of existing workers in the NESAS region, The Pathfinders considered such factors as labor availability, productivity, unionization, attitudes, costs, and education. The analysis was based upon interviews conducted with senior management and human resources professionals from companies located in the labor shed.

As determined from the employer interviews, the tables below reflect the top two methods used to recruit hourly and salaried workers in the NESAS region and the percent of employers utilizing each method. Employers may use multiple recruitment methods.

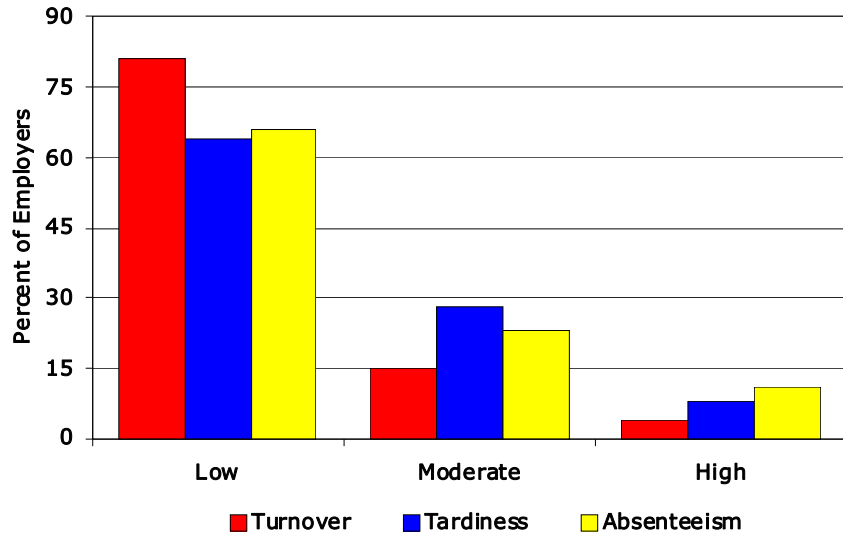
Recruiting Methods – Hourly Workers	% of Employers
Newspaper Ads	38%
Word of Mouth	32%

Recruiting Methods – Salaried Workers	% of Employers
Internet	38%
Newspaper Ads	37%

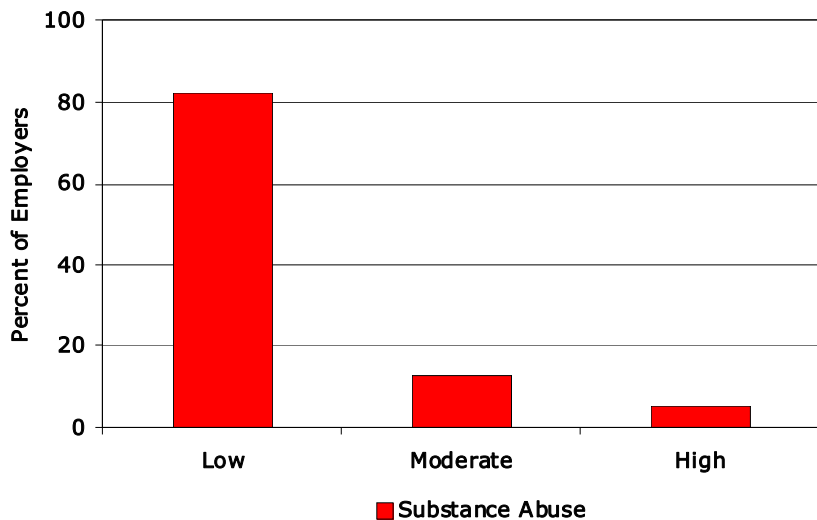
52% of the employers interviewed stated their companies had operations in other regions of the United States. Of these employers, those familiar with the workforces in those other locations reported that their NESAS area operations were comparable to or better than the other regions in terms of profitability and production.



Based upon the experience of The Pathfinders in evaluating labor forces in numerous locations, a definite correlation between productivity, absenteeism, tardiness, turnover, and substance abuse appears to exist. That correlation goes beyond the fact that an absent worker is obviously unproductive. Rather, those factors are indicative of an employee’s attitude toward the job. The chart below shows the percent of employers’ ratings for turnover, tardiness and absenteeism.

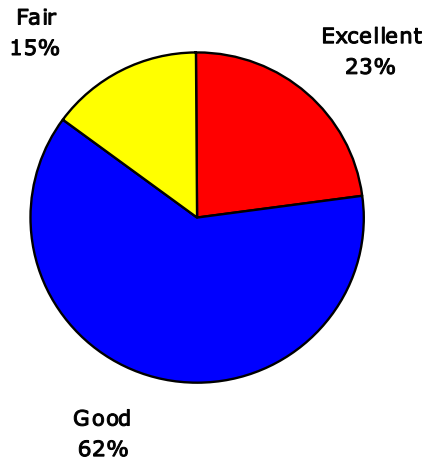


Additionally, in the NESAs region, 78% of the employers interviewed stated their companies tested for substance abuse, primarily pre-employment. Substance abuse within the workforce, as reported by the participating employers, is shown in the chart below.

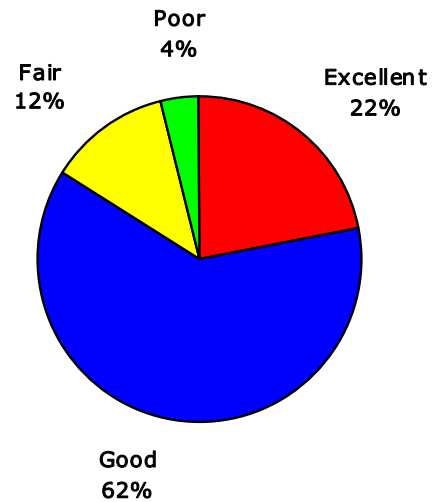


In consideration of all factors, 85% of the employers in the NESAs area rated the productivity of the workforce as "Good" to "Excellent". Worker attitudes received high marks from 86% of the employers.

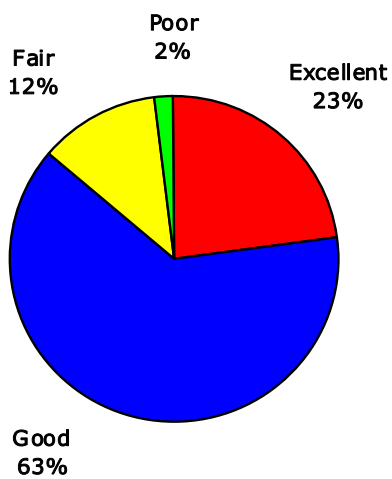
WORKER PRODUCTIVITY



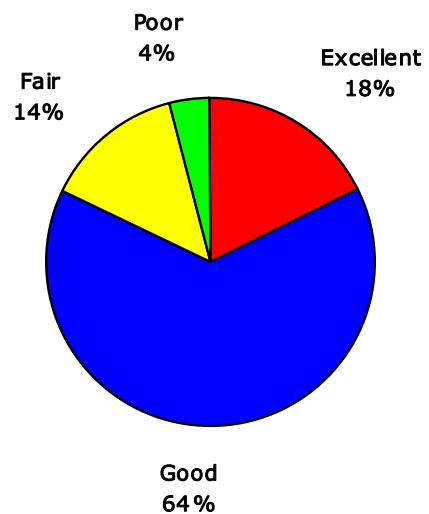
WORKER RELIABILITY



WORKER ATTITUDES

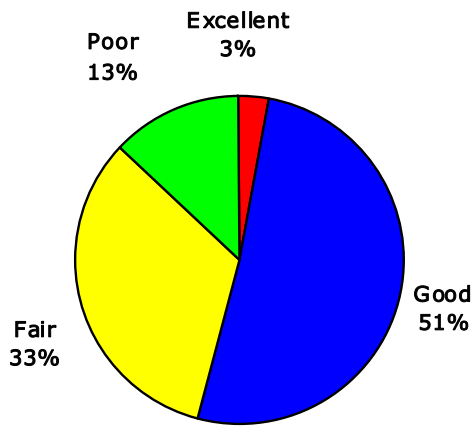


TEAMWORK SKILLS

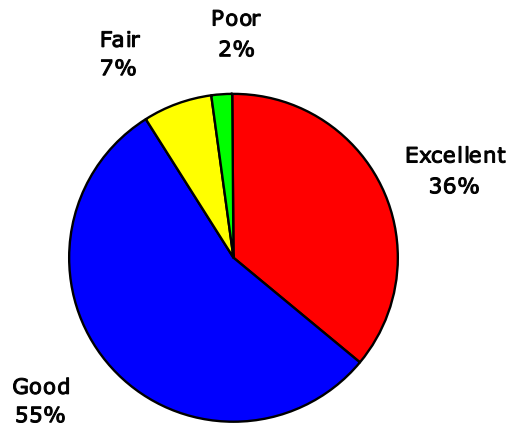


The educational competencies of employees are additional factors used to evaluate an area’s labor force. In the NESAs area, 54% of the employers interviewed rated the local public schools as “Excellent” or “Good”, and 91% of the employers rated the local community colleges and technical schools as “Excellent” or “Good”. Ratings for basic skills and other factors are also shown.

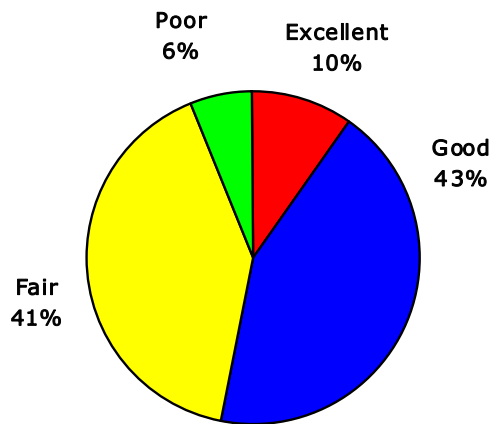
LOCAL PUBLIC SCHOOLS



LOCAL COMMUNITY COLLEGES AND TECH SCHOOLS

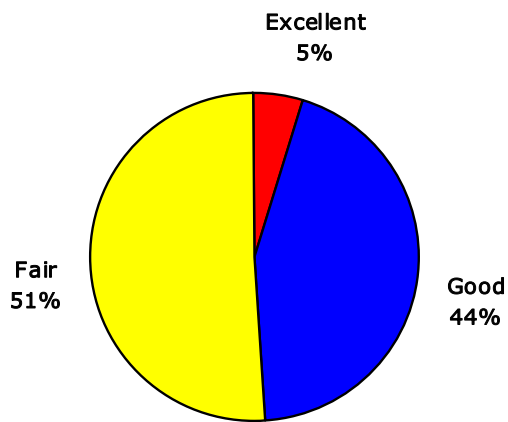


READING SKILLS

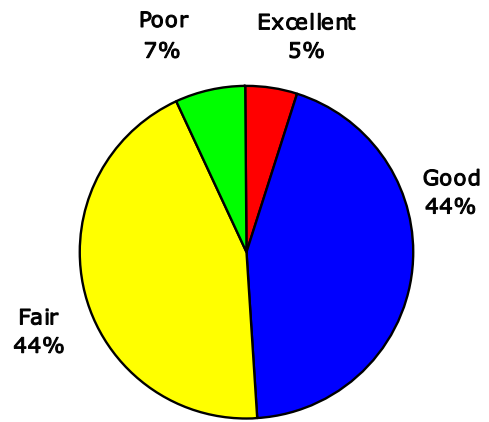


EMPLOYERS' RATINGS The NESAs Area Labor Shed

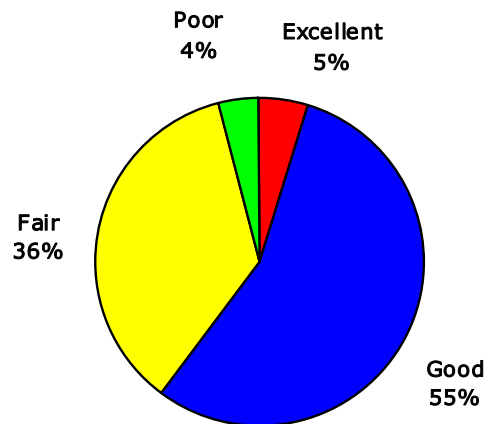
WRITING SKILLS



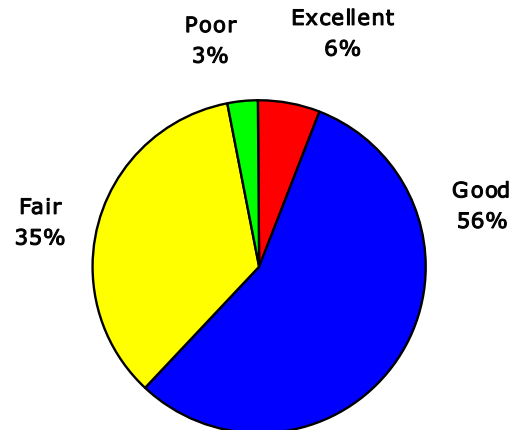
MATH SKILLS



JOB READINESS SKILLS

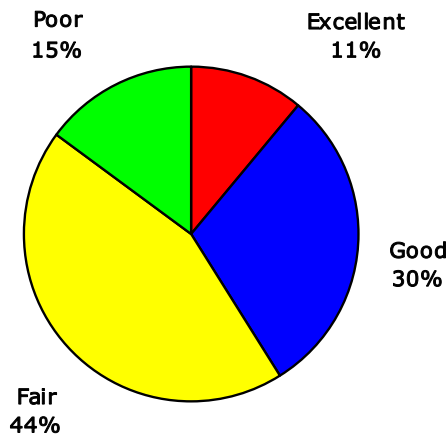


ENTRY LEVEL SKILLS

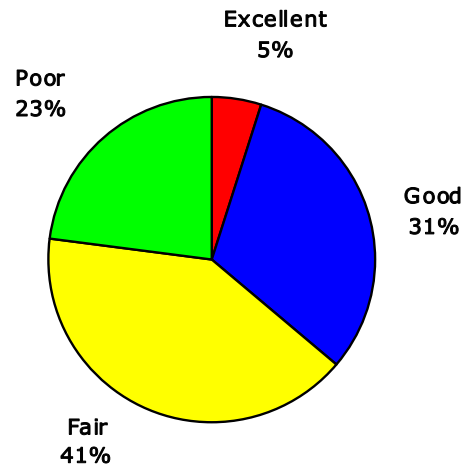


A common employer complaint relates to the shortage of skilled and technical workers. These workers are in great demand and difficult to find in the vast majority of locations. Of the companies in the labor shed interviewed, 41% considered skilled worker availability to be "Excellent" or "Good", while 44% considered it to be "Fair". The availability of technical workers in the labor shed was rated "Excellent" or "Good" by 36% of the interviewed companies and "Fair" by 41%. The ratings for availability of unskilled and professional workers are also illustrated in the pie charts below.

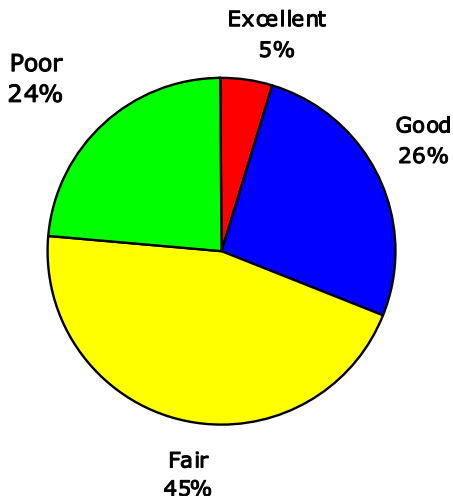
SKILLED WORKERS AVAILABILITY



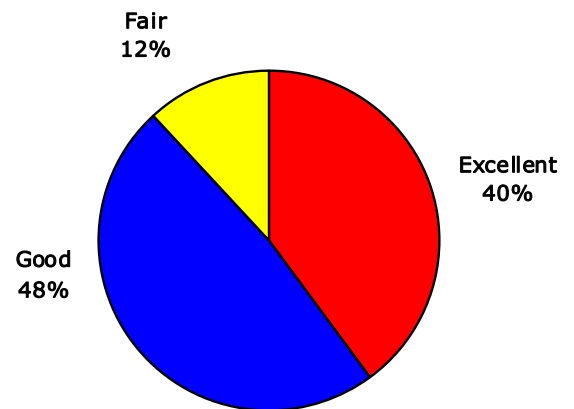
TECHNICAL WORKERS AVAILABILITY



PROFESSIONAL WORKERS AVAILABILITY



UNSKILLED WORKERS AVAILABILITY





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