

**THE  
SOUTH CAROLINA  
AREA  
LABOR AVAILABILITY REPORT**  
including selected counties in  
South Carolina, North Carolina and Georgia

September, 2009

Compiled and Prepared by



**THE PATHFINDERS**

[www.thepathfindersus.com](http://www.thepathfindersus.com)

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## 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 South Carolina 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 South Carolina 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 South Carolina 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 South Carolina area, referred to in this report as the “labor shed”, has a household population of approximately 6,245,600; a civilian labor force of approximately 3,218,800; and a pool of approximately 390,500 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 827,300 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 \$15.69 per hour, and their median desired pay rate is \$17.11 per hour.
- The median desired pay rate of the unemployed workers who are actively seeking work is \$11.97 per hour.
- Survey results indicate 3% of the underemployed and 9% 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 114,600 unemployed individuals in the labor shed who are not actively seeking work but would consider re-entering the workforce.
- In total, the South Carolina area has approximately 1,332,400 available workers for new or expanding businesses.



## METHODOLOGY

The first step in assessing the workforce of the South Carolina 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 South Carolina 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 selected counties in South Carolina, North Carolina and Georgia.

Selected online resources were used in this project. Additionally, The Pathfinders conducted interviews with individuals throughout the South Carolina 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 South Carolina Area Labor Shed

The South Carolina area labor shed has a household population of approximately 6,245,600. The civilian labor force numbers approximately 3,218,800, and the labor shed contains approximately 390,500 unemployed people who are actively seeking work.

The results of this assessment determined that approximately 827,300 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 114,600 individuals would consider re-entering the workforce. Together with the unemployed, actively seeking work individuals, the South Carolina area has approximately 1,332,400 available workers for new or existing employers.

#### TOTAL AVAILABLE WORKERS

Number of underemployed workers	827,300
Number of unemployed, actively seeking work individuals	390,500
Number of unemployed individuals who are considering re-entering the workforce	114,600
<b>Total Number of Workers Available for Employers*</b>	<b>1,332,400</b>

\* 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 South Carolina Area Labor Shed

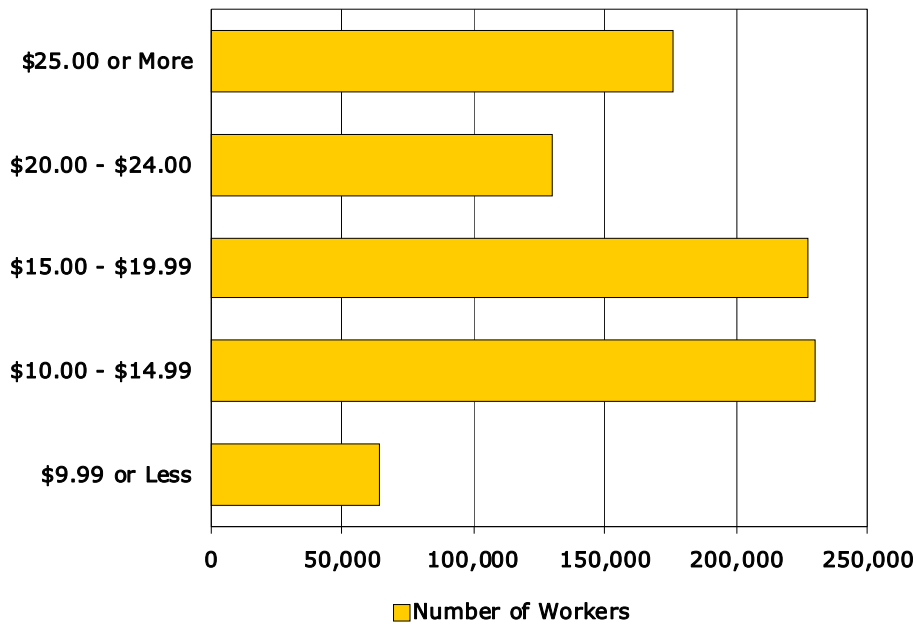
The 827,300 underemployed workers identified in this report might also be termed “upgraders”. They desire to move into an upgraded job and appear to possess the skills, education, and experience to enable them to do so. The following charts represent the desired pay rates of the underemployed individuals 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)

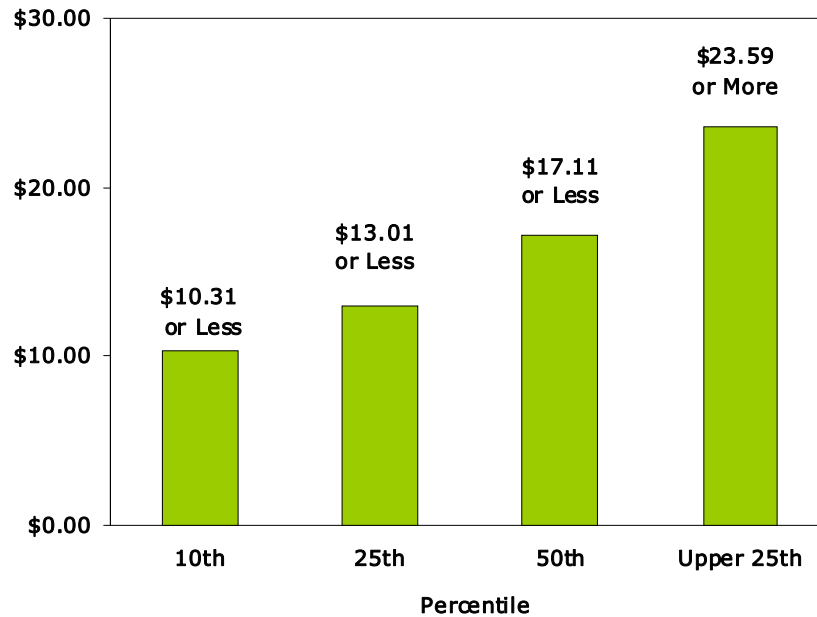
Desired Pay Rate	Number Available
\$7.99 or Less	22,000
\$8.00 - \$9.99	42,200
\$10.00 - \$11.99	90,800
\$12.00 - \$13.99	99,300
\$14.00 - \$15.99	114,700
\$16.00 - \$17.99	85,700
\$18.00 - \$19.99	66,200
\$20.00 - \$21.99	66,100
\$22.00 - \$23.99	39,300
\$24.00 - \$25.99	65,800
\$26.00 - \$27.99	19,600
\$28.00 - \$29.99	32,300
\$30.00 - \$31.99	17,900
\$32.00 or More	65,400



**DESIRED WAGE RATES PER HOUR BY RANGE**  
**827,300 Underemployed Workers**



**DESIRED WAGE RATES PER HOUR BY PERCENTILE**  
**827,300 Underemployed Workers**



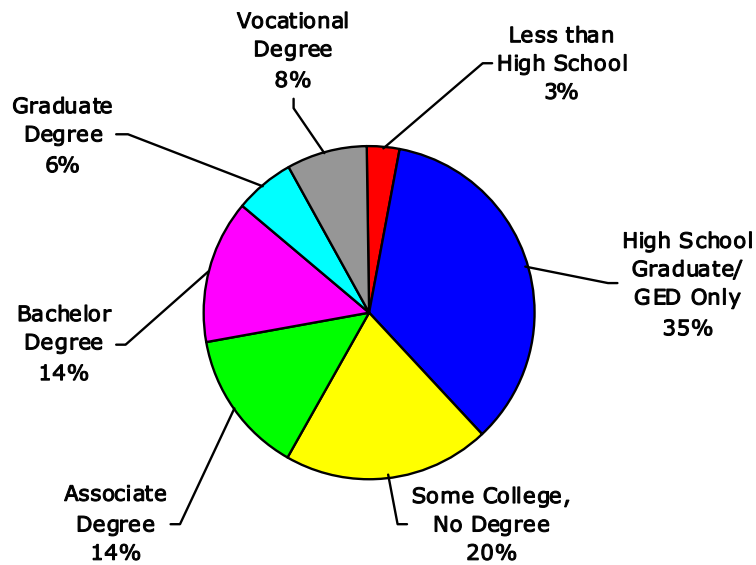
## CHARACTERISTICS OF UNDEREMPLOYED WORKERS

### The South Carolina Area Labor Shed

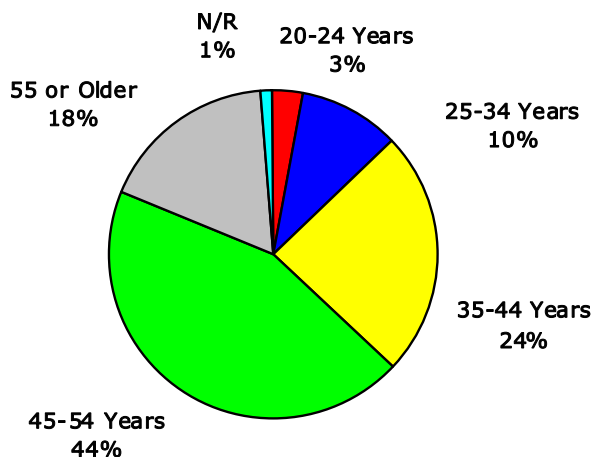
### 827,300 Underemployed Workers

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.

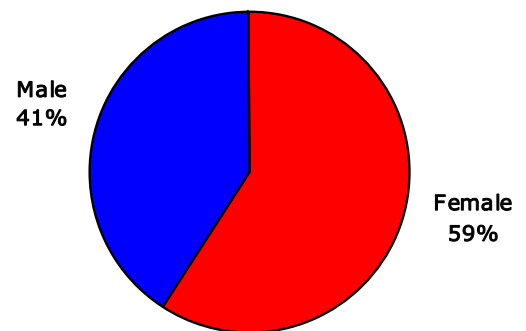
#### EDUCATION



#### AGE



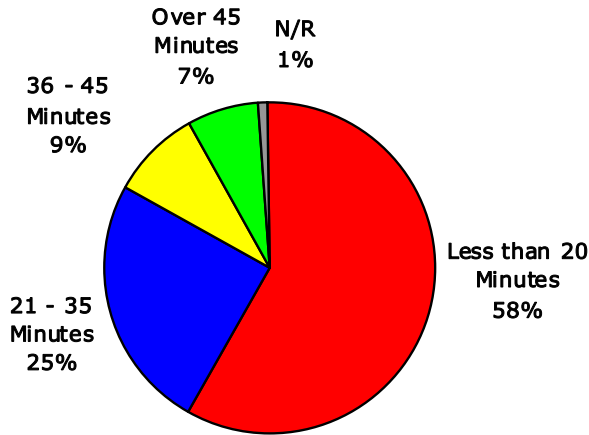
#### GENDER



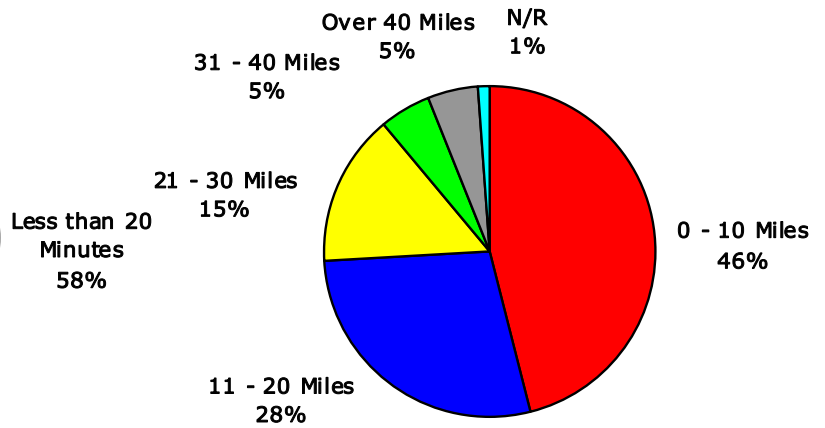
## CHARACTERISTICS OF UNDEREMPLOYED WORKERS

### 827,300 Underemployed Workers

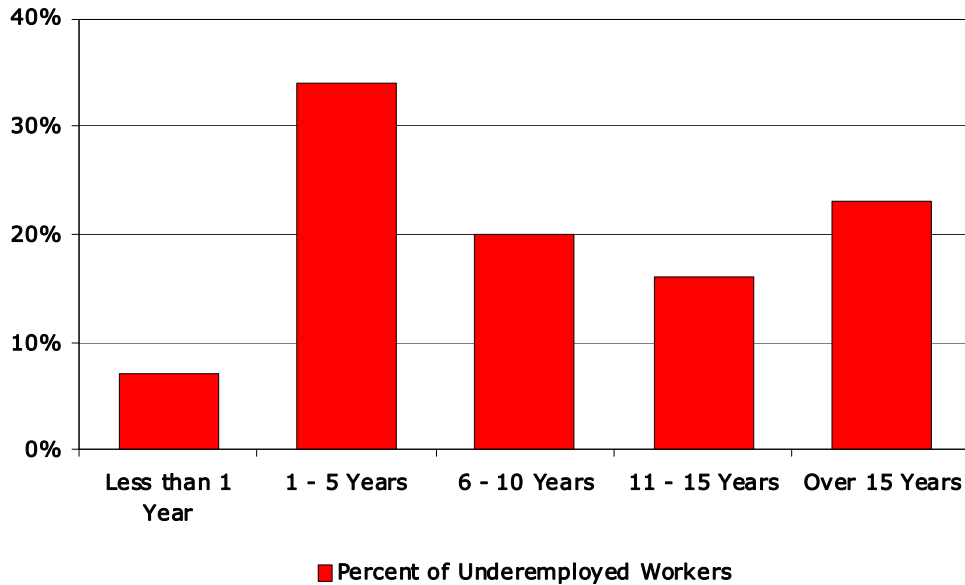
**CURRENT COMMUTE TIME**



**CURRENT COMMUTE DISTANCE**



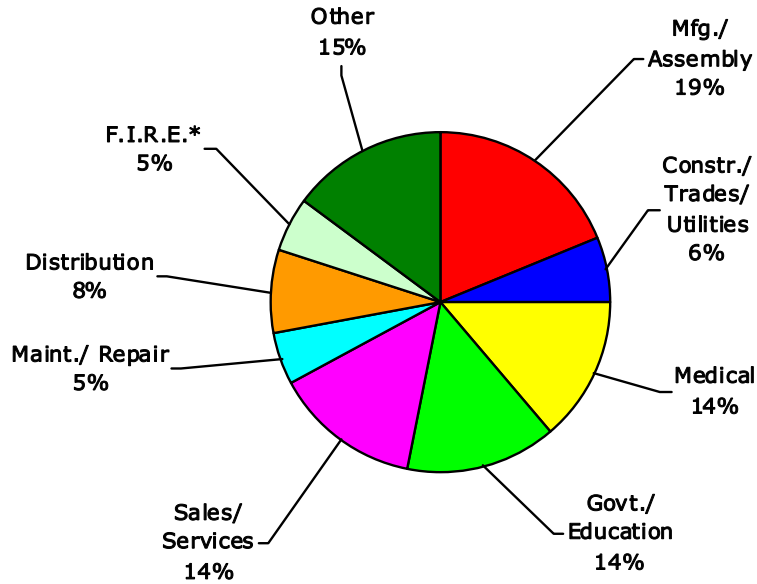
**LENGTH OF TIME IN CURRENT JOB**



## CHARACTERISTICS OF UNDEREMPLOYED WORKERS

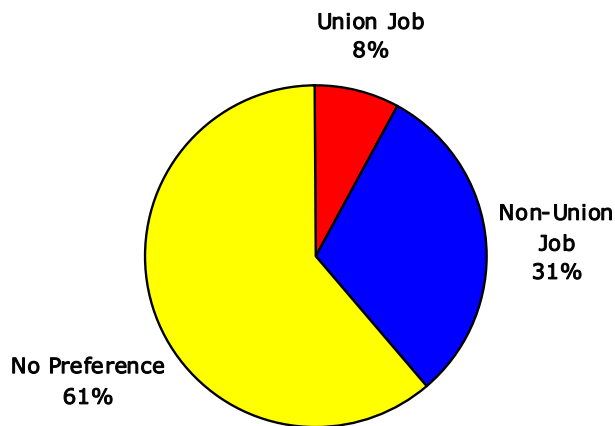
### 827,300 Underemployed Workers

#### CURRENT AREA OF EMPLOYMENT

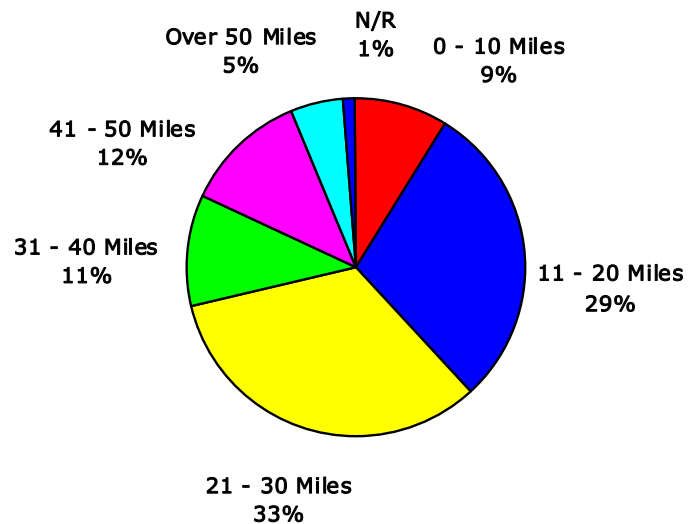


\*Finance, Insurance, Real Estate

#### UNION PREFERENCE



#### MILES WILLING TO COMMUTE



**EXPERIENCE AND SKILLS – UNDEREMPLOYED WORKERS**

**827,300 Underemployed Workers**

Experience Category	Number of Workers (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	554,300	67%	11
Office Operations	537,700	65%	11
Manufacturing/Assembly/Fabrication	438,500	53%	11
Warehouse/Distribution/Transportation	430,200	52%	9
Maintenance/Installation/Repair	273,000	33%	12
Information Technology	264,700	32%	9
Medical/Health Sciences	198,600	24%	10
Call Center	148,900	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	546,000	66%
Warehouse/Materials Handling	463,300	56%
Manufacturing/Assembly/Fabrication	438,500	53%
Information Technology	347,500	42%
Technician/Quality Assurance	297,800	36%
Maintenance/Installation/Repair	273,000	33%
Medical/Health Sciences	215,100	26%
Electronics/Engineering	157,200	19%



## FACTORS AFFECTING JOB DESIRABILITY

### 827,300 Underemployed Workers

In an effort to identify those factors most important to the South Carolina 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	70%	23%	5%	1%	1%
Insurance Benefits	67%	21%	8%	2%	2%
Retirement Benefits	65%	23%	8%	2%	2%
Salary	58%	30%	10%	1%	1%
Opportunity for Advancement	53%	30%	13%	2%	2%
Physical Working Environment	41%	31%	22%	3%	3%
Paid Training Programs	41%	35%	18%	4%	2%
Location	39%	28%	27%	4%	2%

As shown above, the underemployed workers in the South Carolina 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 South Carolina Area Labor Shed**

This report documents two groups of unemployed individuals in the South Carolina 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 390,500 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 114,600 people, who are not currently employed or actively seeking work, would consider re-entering the workforce.

In total, the labor shed has approximately 505,100 unemployed individuals who would be considered potential workers for a new or expanding operation.

**UNEMPLOYED INDIVIDUALS**

<b>Number of unemployed, actively seeking work individuals</b>	<b>390,500</b>
<b>Number of unemployed individuals who would considering re-entering the workforce</b>	<b>114,600</b>
	<hr/>
<b>Total Number of Unemployed Individuals Available for Employers</b>	<b>505,100</b>

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

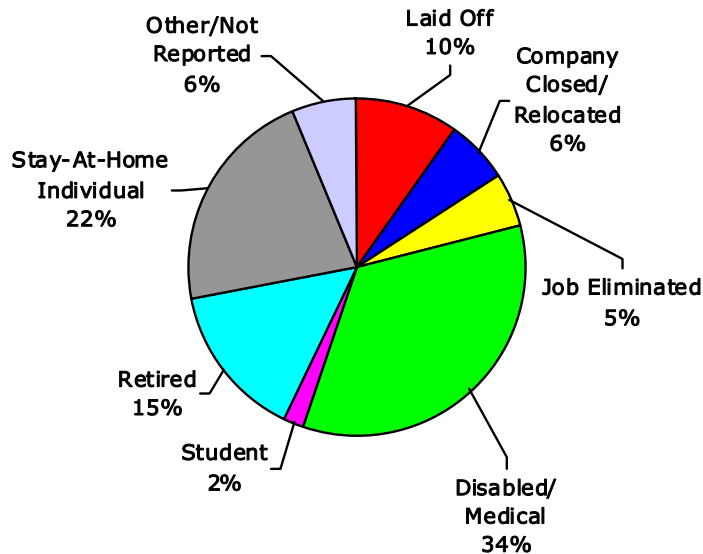


## ASSESSMENT OF INDIVIDUALS WHO WOULD CONSIDER RE-ENTERING THE WORKFORCE

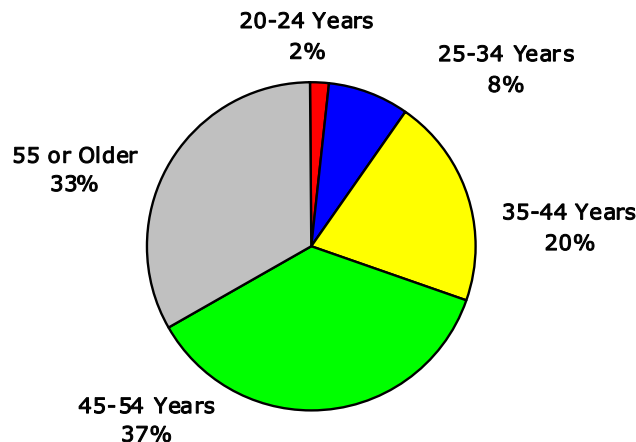
### The South Carolina Area Labor Shed

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



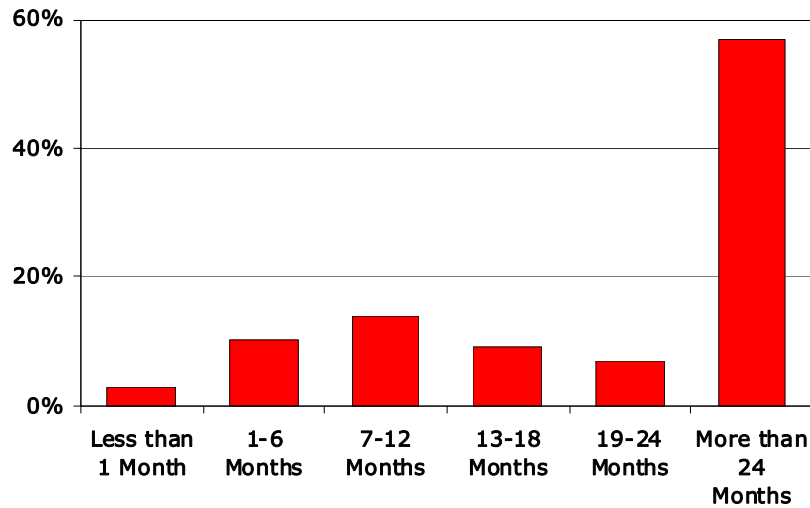
#### AGE



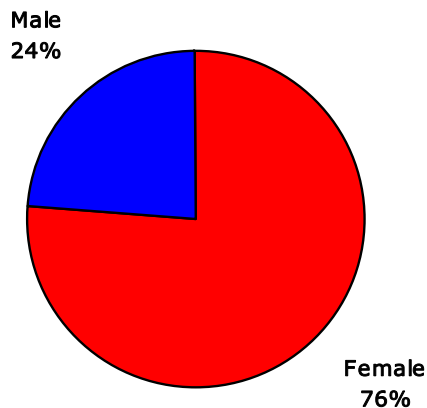
**CHARACTERISTICS OF INDIVIDUALS WHO  
WOULD CONSIDER RE-ENTERING THE WORKFORCE**

**114,600 Potential Workers**

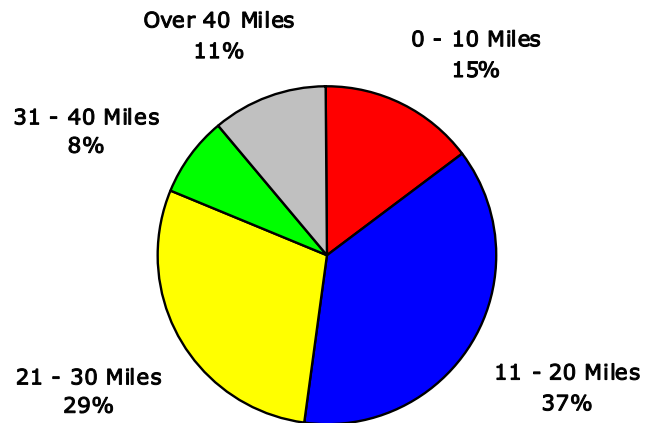
**LENGTH OF TIME UNEMPLOYED**



**GENDER**

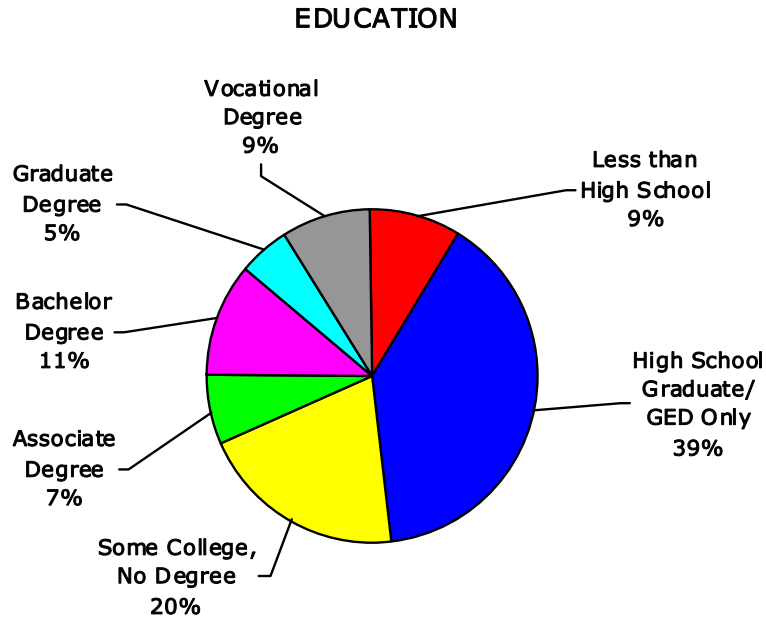


**MILES WILLING TO COMMUTE**



**CHARACTERISTICS OF INDIVIDUALS WHO  
WOULD CONSIDER RE-ENTERING THE WORKFORCE**

**114,600 Potential Workers**



- The median desired pay rate of the unemployed individuals who would consider re-entering the workforce is \$12.88 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.

- 9% of the unemployed individuals who would consider re-entering the workforce would prefer a union job; 20% a non-union job; and, 71% have no preference.



**EXPERIENCE AND SKILLS – INDIVIDUALS WHO  
WOULD CONSIDER RE-ENTERING THE WORKFORCE**

**114,600 Potential Workers**

Experience Category	Number of Individuals (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	63,000	55%	9
Office Operations	59,600	52%	8
Warehouse/Distribution/Transportation	47,000	41%	9
Manufacturing/Assembly/Fabrication	45,800	40%	10
Medical/Health Sciences	29,800	26%	9
Information Technology	27,500	24%	7
Maintenance/Installation/Repair	25,200	22%	12
Call Center	16,000	14%	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 Individuals (Rounded)	Percentage of Total
Office Operations	59,600	52%
Manufacturing/Assembly/Fabrication	49,300	43%
Warehouse/Materials Handling	43,500	38%
Information Technology	36,700	32%
Medical/Health Sciences	29,800	26%
Maintenance/Installation/Repair	26,400	23%
Technician/Quality Assurance	22,900	20%
Electronics/Engineering	12,600	11%

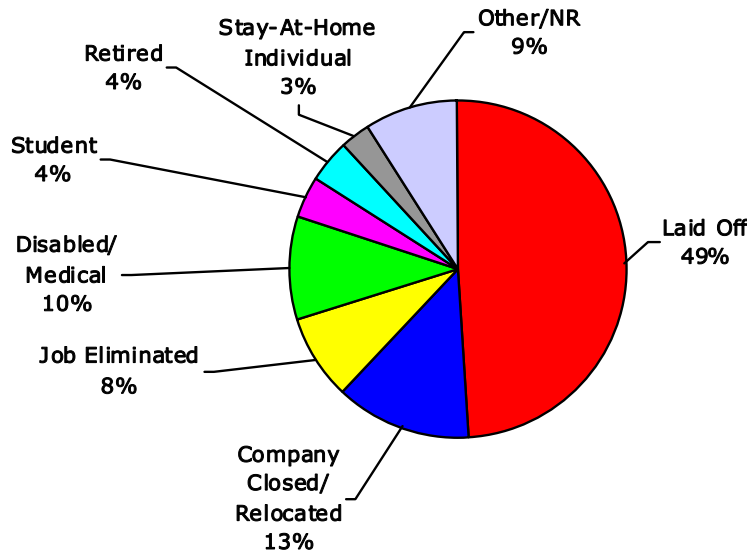


## CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

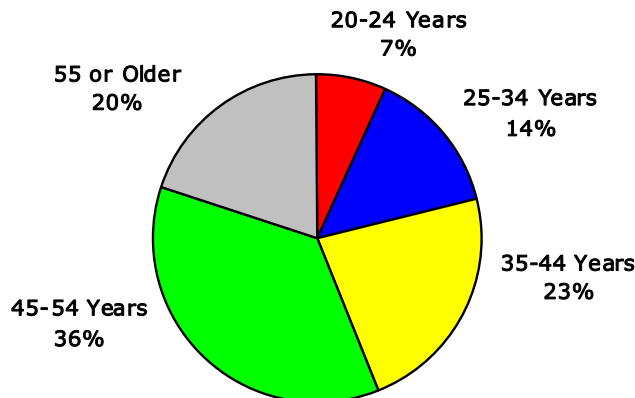
**390,500 Workers**

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



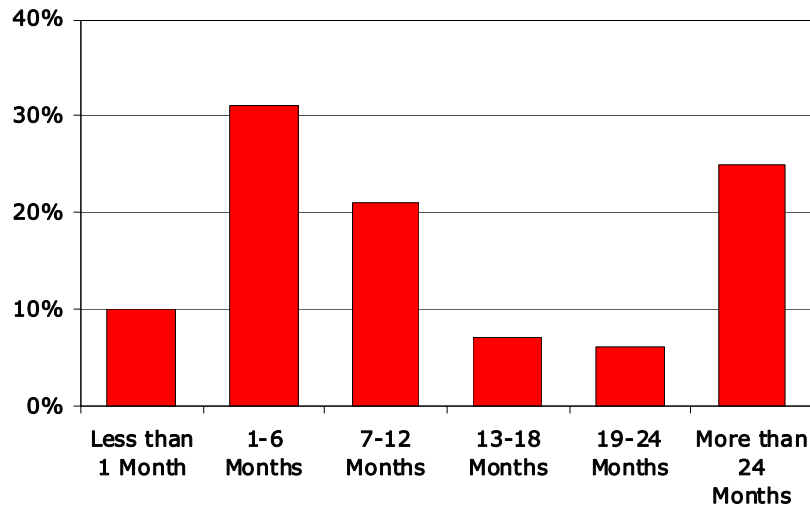
### AGE



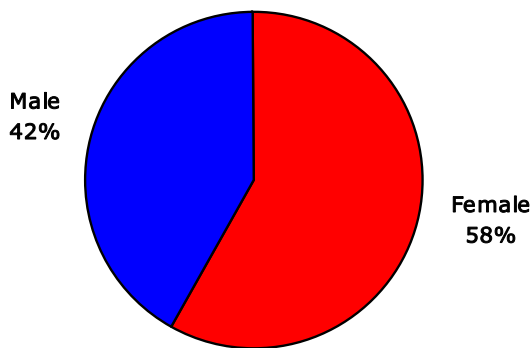
## CHARACTERISTICS OF UNEMPLOYED INDIVIDUALS WHO ARE ACTIVELY SEEKING WORK

**390,500 Workers**

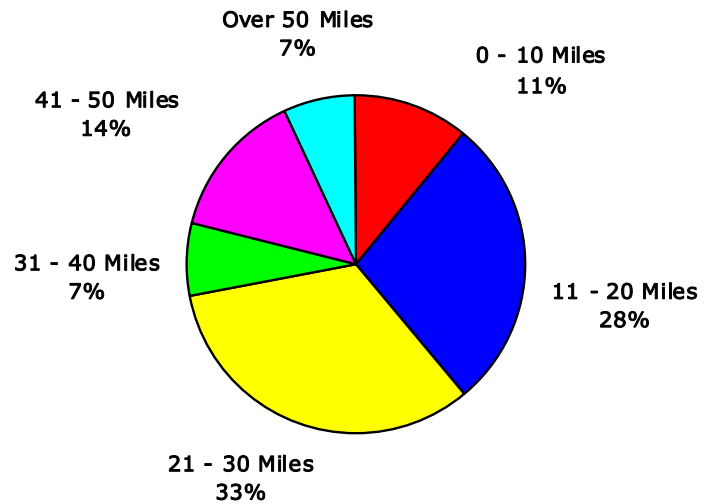
### LENGTH OF TIME UNEMPLOYED



### GENDER

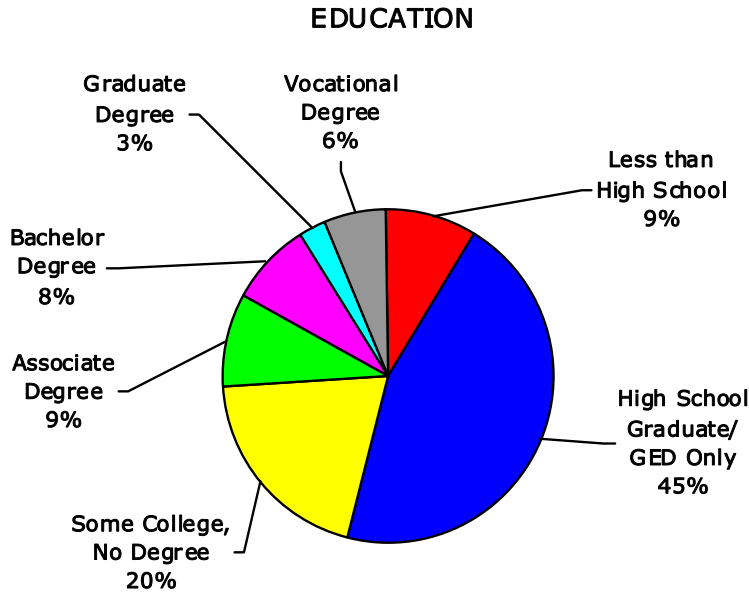


### MILES WILLING TO COMMUTE



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

**390,500 Workers**



- The median most recent pay rate of the unemployed workers who are actively seeking work is \$12.47 per hour. The median desired pay rate of these individuals is \$11.97 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 insurance benefits and financial stability of the company.

- 9% of the unemployed individuals who are actively seeking work would prefer a union job; 17% a non-union job; and, 74% have no preference.



**EXPERIENCE AND SKILLS OF UNEMPLOYED INDIVIDUALS WHO ARE  
ACTIVELY SEEKING WORK**

**390,500 Workers**

Experience Category	Number of Workers (Rounded)	Percentage of Total	Average Years of Experience
Customer Service	234,300	60%	8
Manufacturing/Assembly/Fabrication	203,100	52%	10
Warehouse/Distribution/Transportation	187,400	48%	7
Office Operations	183,500	47%	9
Maintenance/Installation/Repair	144,500	37%	10
Information Technology	109,300	28%	8
Medical/Health Sciences	74,200	19%	7
Call Center	66,400	17%	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
Warehouse/Materials Handling	214,800	55%
Manufacturing/Assembly/Fabrication	203,100	52%
Office Operations	195,300	50%
Maintenance/Installation/Repair	128,900	33%
Information Technology	125,000	32%
Technician/Quality Assurance	97,600	25%
Medical/Health Sciences	85,900	22%
Electronics/Engineering	66,400	17%

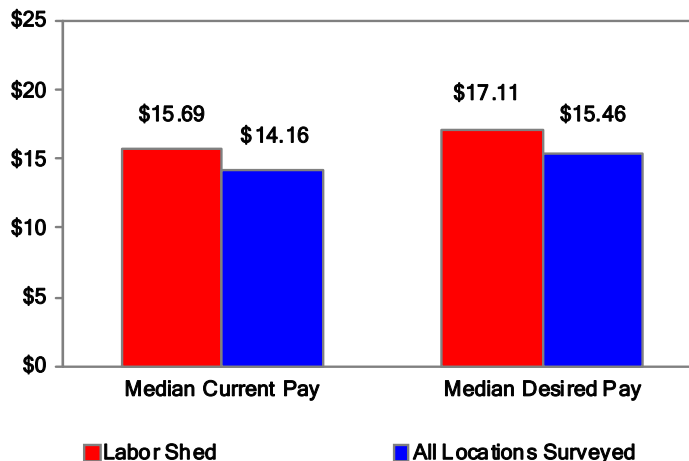


## NATIONAL COMPARISONS OF UNDEREMPLOYED WORKFORCE

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 South Carolina 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 South Carolina region is referred to as “labor shed”.

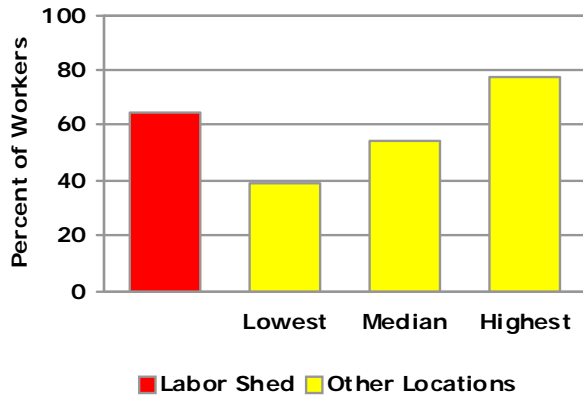
The chart below illustrates the median current and desired wages of the underemployed workers in the South Carolina labor shed as compared to those underemployed workers in all locations surveyed by The Pathfinders over the past eighteen months. As indicated, the median current pay of all surveyed, underemployed 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 South Carolina region’s underemployed workers have higher pay rates in both median current pay and desired pay than other locations surveyed.

### COMPARISON OF MEDIAN CURRENT / DESIRED WAGES (per hour)

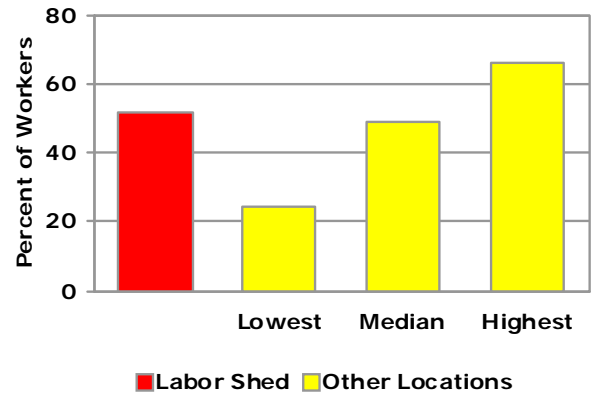


**COMPARISON OF EXPERIENCE  
UNDEREMPLOYED WORKERS  
The South Carolina Area /  
Locations Surveyed Over the Past 18 Months**

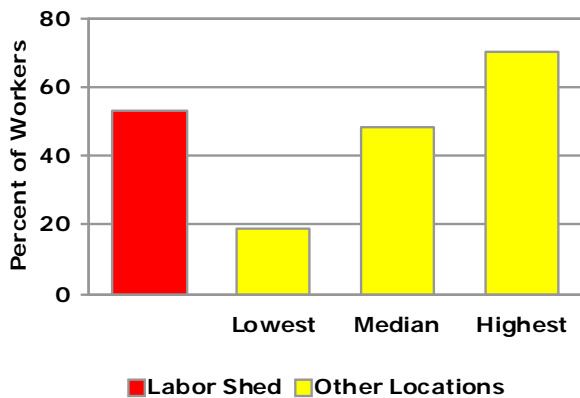
**OFFICE**



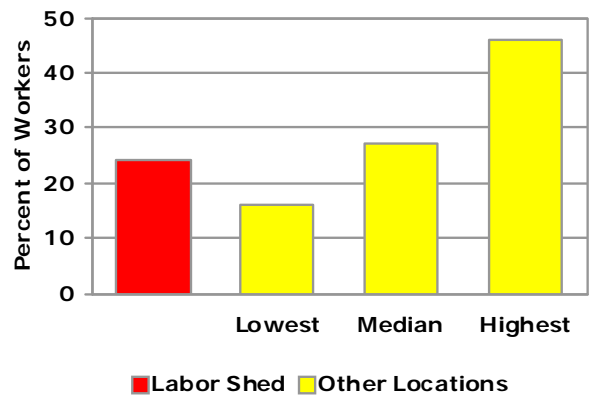
**WAREHOUSE / DISTRIBUTION /  
TRANSPORTATION**



**MANUFACTURING / ASSEMBLY /  
FABRICATION**

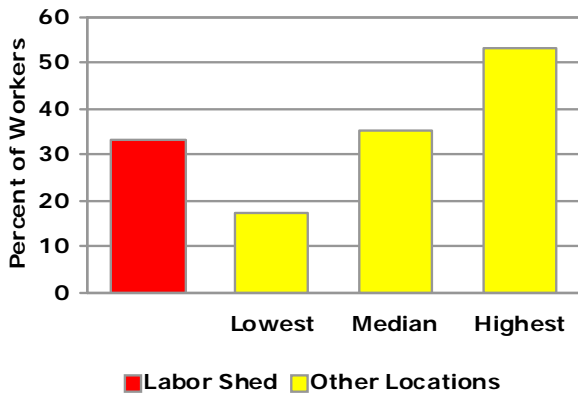


**MEDICAL /  
HEALTH SCIENCES**



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

**MAINTENANCE /  
INSTALLATION / REPAIR**



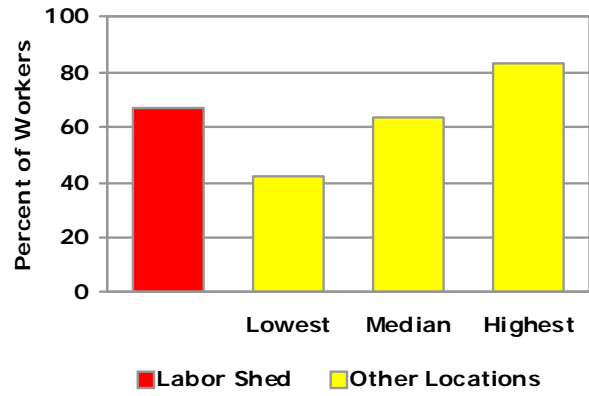
**CALL CENTER**



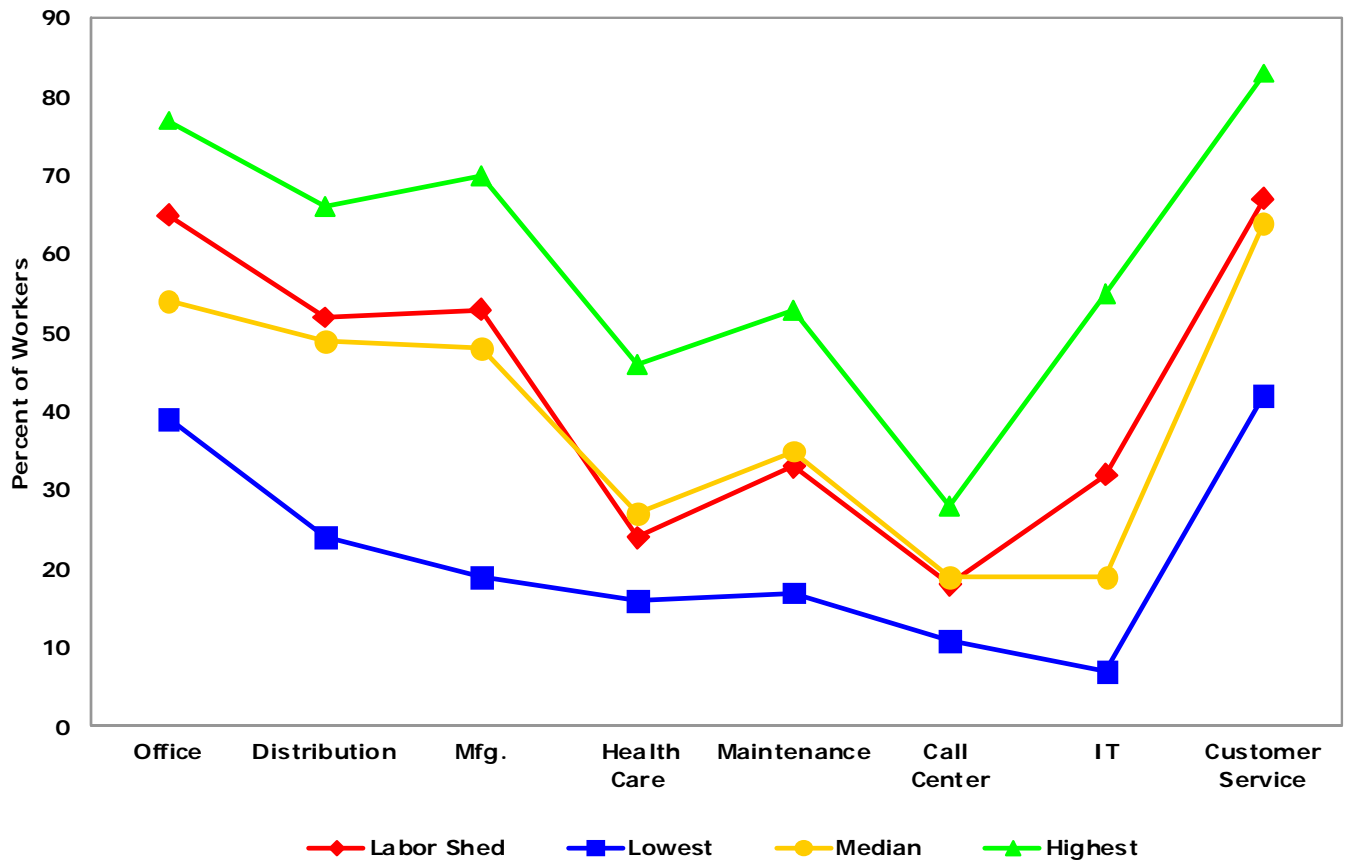
**INFORMATION TECHNOLOGY**



**CUSTOMER SERVICE**

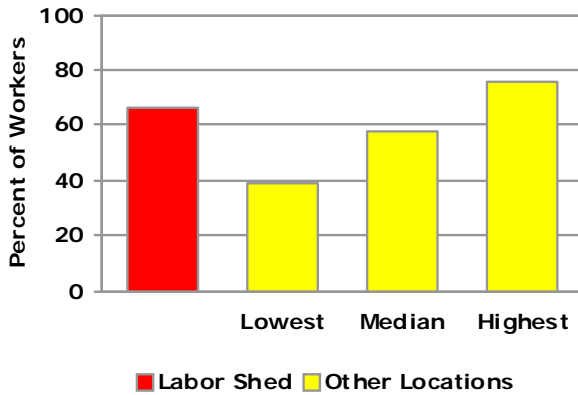


**SUMMARY COMPARISON OF EXPERIENCE**  
**UNDEREMPLOYED WORKERS**  
**The South Carolina Area /**  
**Locations Surveyed Over the Past 18 Months**

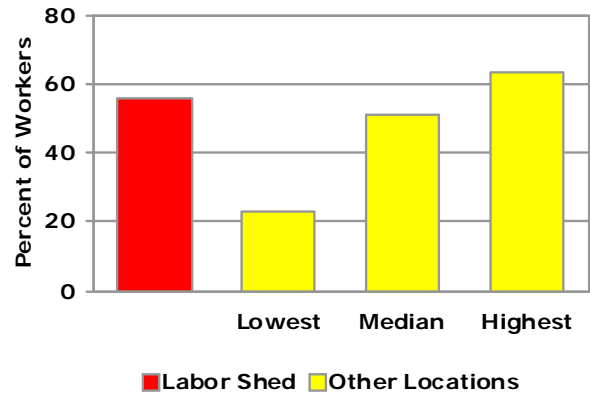


**COMPARISON OF SKILLS  
UNDEREMPLOYED WORKERS  
The South Carolina Area /  
Locations Surveyed Over the Past 18 Months**

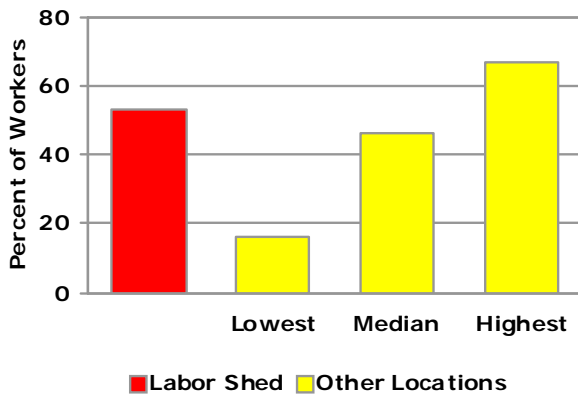
**OFFICE**



**WAREHOUSE /  
MATERIALS HANDLING**



**MANUFACTURING / ASSEMBLY /  
FABRICATION**

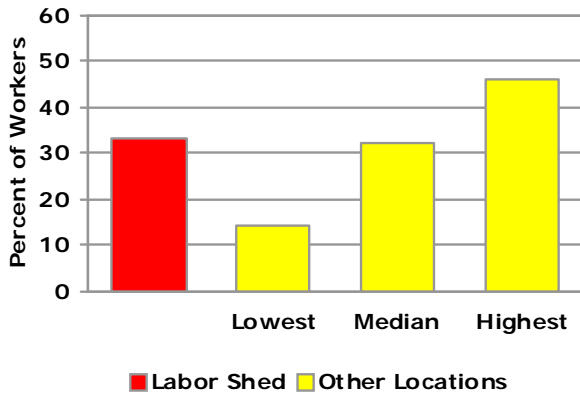


**MEDICAL /  
HEALTH SCIENCES**



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

**MAINTENANCE /  
INSTALLATION / REPAIR**



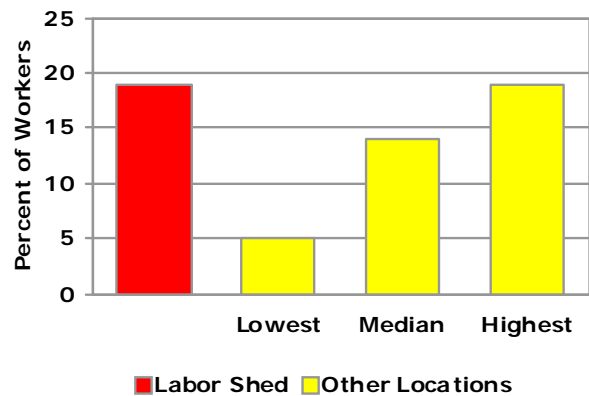
**TECHNICIAN / QUALITY  
ASSURANCE**



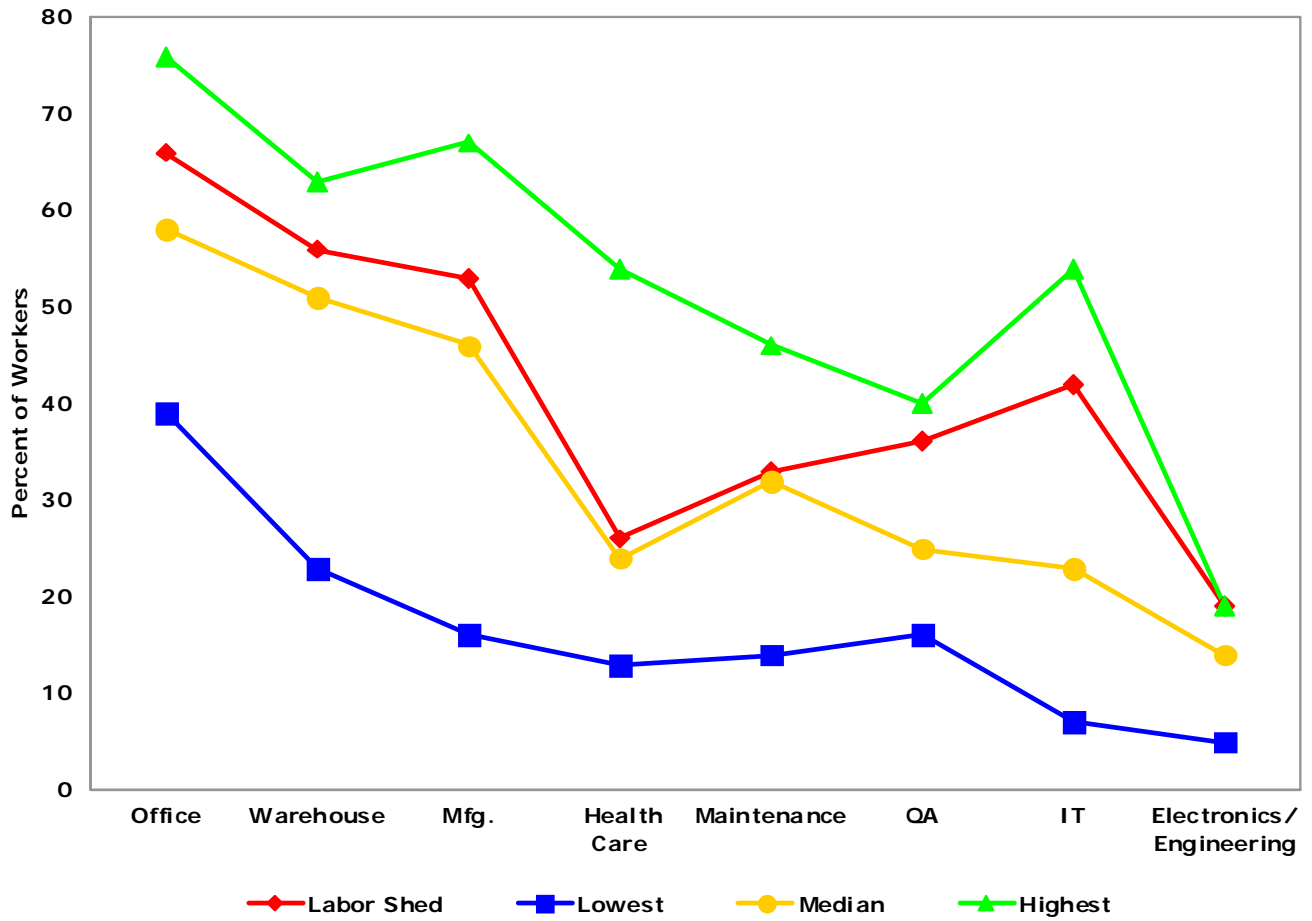
**INFORMATION TECHNOLOGY**



**ELECTRONICS /  
ENGINEERING**



**SUMMARY COMPARISON OF SKILLS  
UNDEREMPLOYED WORKERS  
The South Carolina Area /  
Locations Surveyed Over the Past 18 Months**



## EMPLOYERS' VIEWS OF THE THE SOUTH CAROLINA AREA TOTAL WORKFORCE

In developing a profile of existing workers in the South Carolina 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.

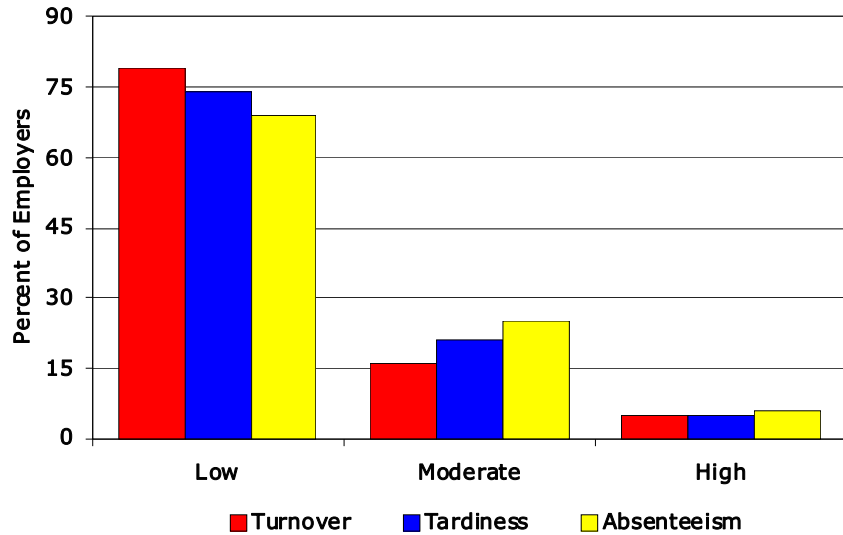
As determined from the employer interviews, the tables below reflect the top two methods used to recruit hourly and salaried workers in the South Carolina region and the percent of employers utilizing each method. Employers may use multiple recruitment methods.

Recruiting Methods – Hourly Workers	% of Employers
Staffing/Temp Service	36%
Walk-Ins	26%
Recruiting Methods – Salaried Workers	% of Employers
Internet	41%
Newspaper Ads	35%

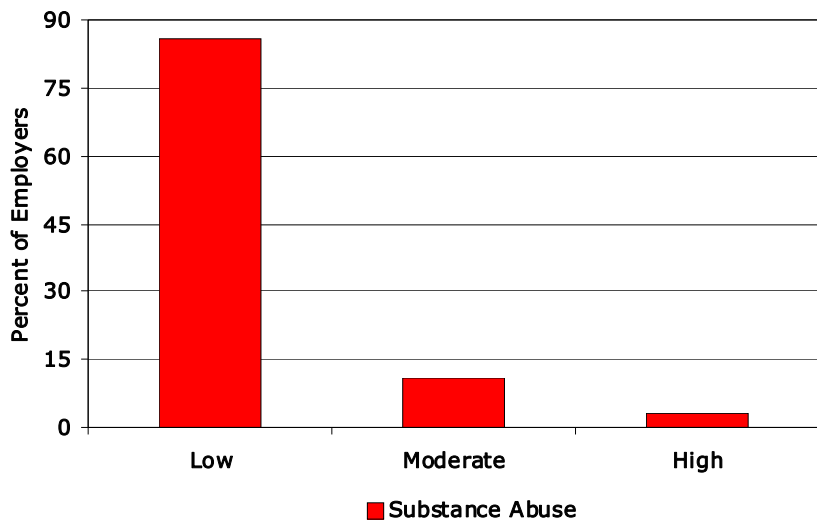
65% of the employers interviewed stated their companies had operations in other regions of the United States. Of these employers, those familiar with the workforces in those other locations reported that their South Carolina area operations were comparable to or better than the other regions in terms 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.

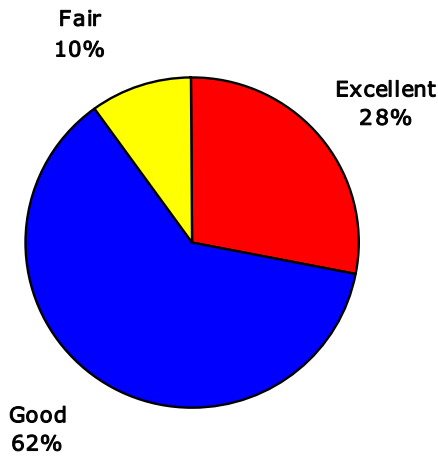


Additionally, in the South Carolina region, 83% of the employers interviewed stated their companies tested for substance abuse, primarily pre-employment. Substance abuse within the workforce, as reported by the participating employers, is shown in the chart below.

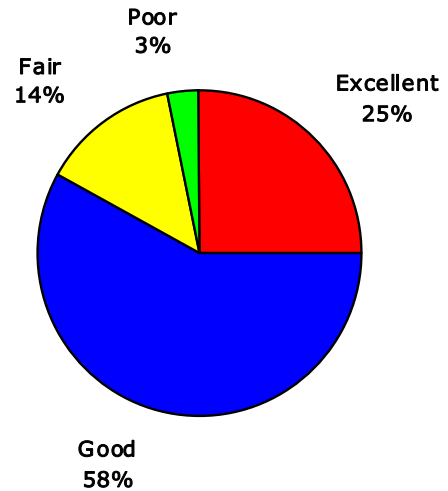


In consideration of all factors, 90% of the employers in the South Carolina area rated the productivity of the workforce as "Good" to "Excellent". Worker attitudes received high marks from 85% of the employers.

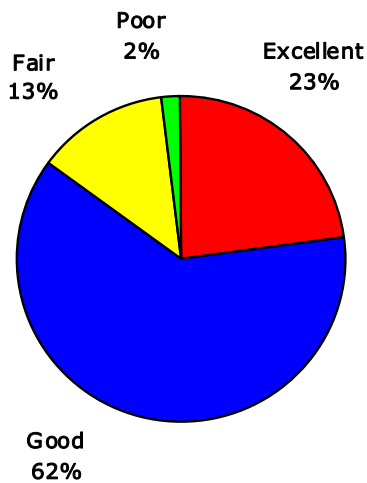
**WORKER PRODUCTIVITY**



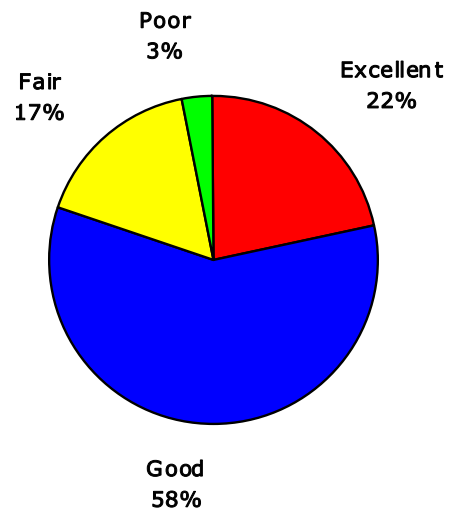
**WORKER RELIABILITY**



**WORKER ATTITUDES**

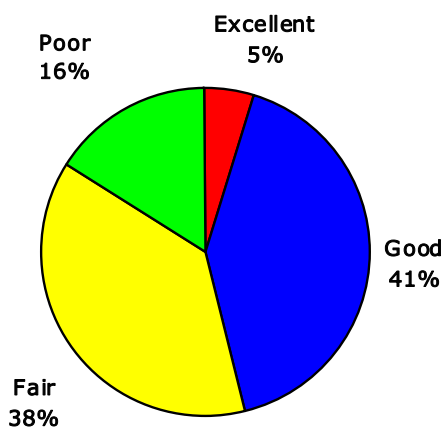


**TEAMWORK SKILLS**

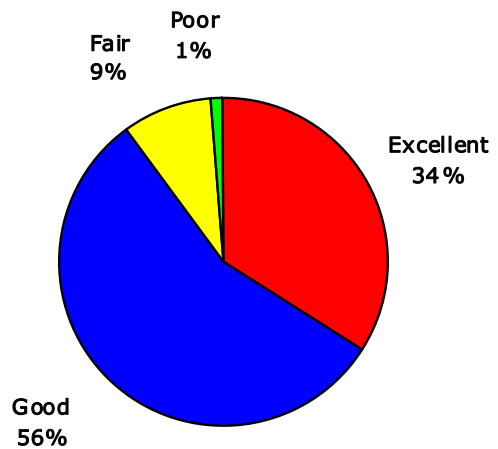


The educational competencies of employees are additional factors used to evaluate an area’s labor force. In the South Carolina area, 46% of the employers interviewed rated the local public schools as “Excellent” or “Good”, and 90% of the employers rated the local community colleges and technical schools as “Excellent” or “Good”. Ratings for basic skills and other factors are also shown.

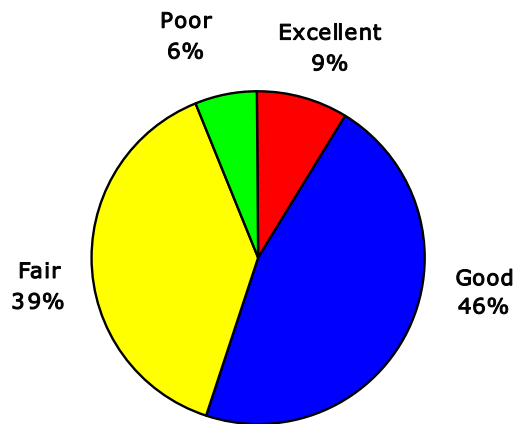
**LOCAL PUBLIC SCHOOLS**



**LOCAL COMMUNITY COLLEGES AND TECH SCHOOLS**

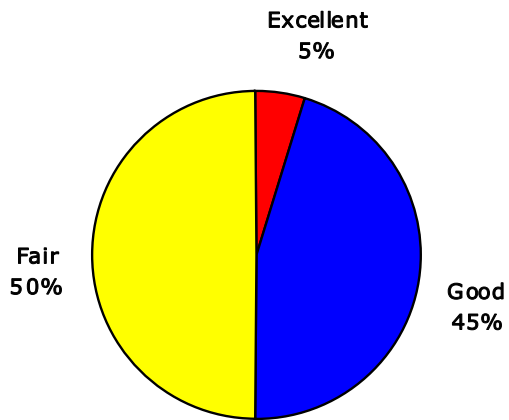


**READING SKILLS**

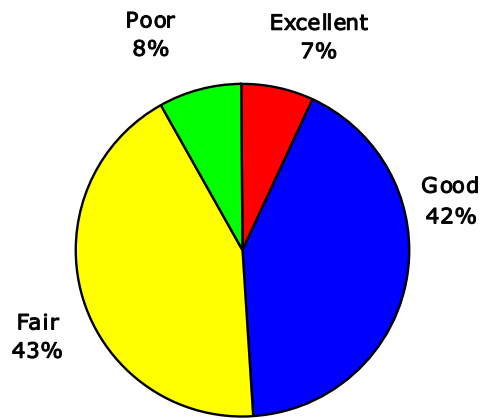


### EMPLOYERS' RATINGS The South Carolina Area Labor Shed

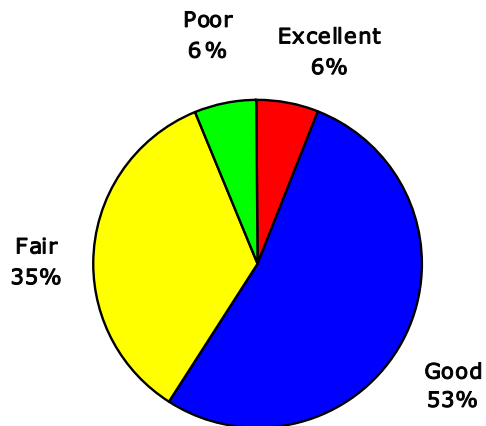
**WRITING SKILLS**



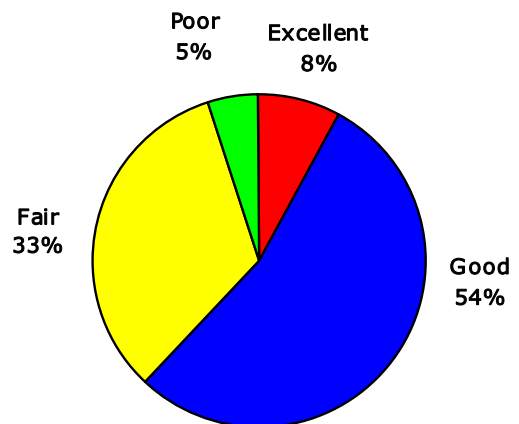
**MATH SKILLS**



**JOB READINESS SKILLS**

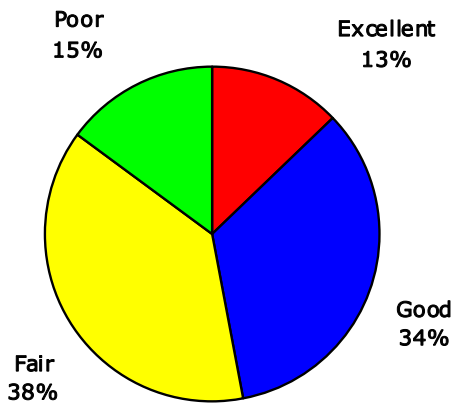


**ENTRY LEVEL SKILLS**

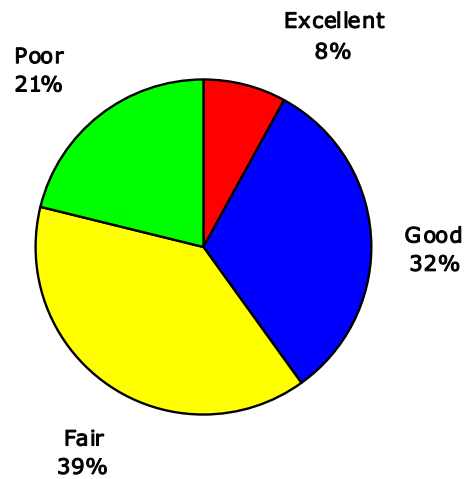


A common employer complaint relates to the shortage of skilled and technical workers. These workers are in great demand and difficult to find in the vast majority of locations. Of the companies in the labor shed interviewed, 47% considered skilled worker availability to be "Excellent" or "Good", while 38% considered it to be "Fair". The availability of technical workers in the labor shed was rated "Excellent" or "Good" by 40% of the interviewed companies and "Fair" by 39%. The ratings for availability of unskilled and professional workers are also illustrated in the pie charts below.

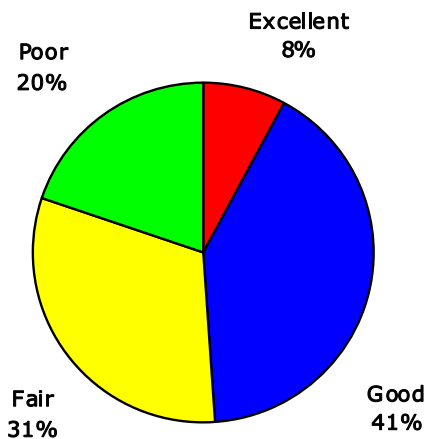
**SKILLED WORKERS AVAILABILITY**



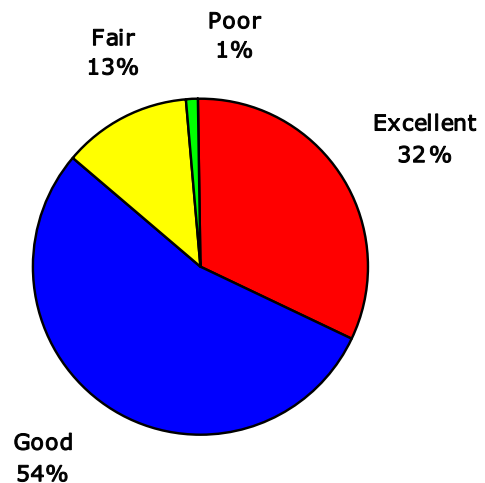
**TECHNICAL WORKERS AVAILABILITY**



**PROFESSIONAL WORKERS AVAILABILITY**



**UNSKILLED WORKERS AVAILABILITY**





## **THE PATHFINDERS**

P.O. Box 702317  
Dallas, Texas 75370

Telephone: 972-387-3750  
Fax: 469-916-6878

E-Mail: [info@thepathfindersus.com](mailto:info@thepathfindersus.com)

Web site: [www.thepathfindersus.com](http://www.thepathfindersus.com)