



Laurens County Development Corporation

Economic Development Strategy

Report 1: Discovery

Prepared for the LCDC | January 2020



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01

Introduction

About the Strategic Planning Process

This Economic Development Strategy for the Laurens County Development Corporation (LCDC) will identify top opportunities to increase growth and prosperity in Laurens County over the next five years. While this plan was created by the LCDC, its initiatives are meant to be implemented by many stakeholders across the county. Working together, leaders and residents can build on the community's strong economic momentum to create prosperity for generations to come.

Phase 1: Discovery

This phase of the project began with an in-depth review of existing studies and information to ensure this strategy is cohesive with current city and regional initiatives. The consulting team then conducted a thorough evaluation of the region's economic and demographic conditions, including benchmarking against the Greenville-Anderson-Mauldin, SC Metropolitan Statistical Area (MSA) and South Carolina. The team also evaluated Laurens County's current target clusters to determine which industries are best suited to catalyze growth in Laurens County. In addition to examining quantitative data, the consultants collected qualitative data via interviews, focus groups, steering committee meetings, a community survey, leadership meetings, and a workshop with the Laurens County Council. Based on the results of this research, the consulting team developed a description of top opportunities, a SWOT Analysis, and new target industry clusters to become the focus of future economic development.

Phase 2: Strategy

In Phase 2, the consulting team will identify best practices from similar communities that can inspire activities going forward. A refreshed vision statement will be crafted. The consulting team will then develop goals that support the vision and a strategic framework for use as a structure for implementation. Thoughtful and creative recommendations will be offered within each goal of the Strategy. The Strategy will include an Implementation Plan that recommends specific projects and tactics for the years 1-5 of implementation, including assigned project team members, timeframe, and performance metrics. Profiles of the new target clusters will also be created that identify strengths and opportunities within each of the identified clusters.

PHASE 1: DISCOVERY

- Information Review
- Economic & Demographic Scan
- Stakeholder Input
- SWOT Analysis
- Target Cluster Evaluation

PHASE 2: STRATEGY

- Best Practices
- Vision, Goals & Strategic Framework
- Recommendations
- Target Cluster Profiles
- Implementation Plan
- Performance Metrics



Project Partners

This Economic Development Strategy was developed in partnership with Avalanche Consulting, the Laurens County Development Corporation, and community stakeholders.

The Laurens County Development Corporation

The Laurens County Development Corporation mission is to ensure that Laurens County continues to be a “business-centered” community which focuses on economic opportunities that result in a viable future for all County citizens. The Laurens County Development Corporation is committed to a future for Laurens County that includes jobs that pay well, jobs that allow families to grow and thrive, and jobs that include good benefits packages. (www.GrowLaurensCounty.com)

Avalanche Consulting

Avalanche Consulting is the nation's premier economic development strategist. Avalanche is deeply driven to make a positive impact and seeks clients who are equally inspired to energize their economies. Headquartered in Austin, Avalanche was established in 2005. Its team has a combined 100+ years of experience as economic development consultants and has worked with 150+ communities. (www.AvalancheConsulting.com)

Community Stakeholders

The consulting team would like to thank the community stakeholders that participated in interviews, focus groups, Steering Committee meetings, the community survey, leadership meetings, and the County Council workshop. Your input is instrumental in developing an Economic Development Strategy tailored to Laurens County's most pressing needs.



Community Stakeholders

Avalanche Consulting and the Laurens County Development Corporation sincerely thank the members of Steering Committee and County Council for helping inform and guide the development of this Strategy. Members include:

Steering Committee

Richard Blackwell, Agracel
 Chuck Blocker, Teknor Apex
 Shawn Bell, City of Fountain Inn
 Justin Benfield, Prisma Health Laurens County Hospital
 Stan Bryson, CNNGA
 Jon Caime, Laurens County Administrator
 Jim Coleman, Laurens County
 Sandy Cruickshanks, Laurens County
 Bill Ed Cannon, City of Clinton
 Rusty Denning, Piedmont Technical College
 Jeff Field, Laurens County Water & Sewer Commission
 Randy Garrett, Laurens Electric Cooperative
 Jacob Hickman, Upstate SC Alliance
 Mayor Stellartean Jones, Town of Gray Court

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 Brent Pahach, Ceramtec
 Brown Patterson, Laurens County Council
 Dr. Stephen Peters, Laurens County School District 55
 Dr. David Pitts, Laurens County Council Chairman
 Mayor Nathan Senn, City of Laurens
 Bob Staton, Presbyterian College
 Steve West, Duke Energy
 John Young, Laurens CPW

County Council

M. Kemp Younts, District 1
 Joseph E. Wood, Jr., District 2
 Garrett C. McDaniel, District 3
 Brown Patterson, District 4
 Jeffrey Dean Carroll, District 5
 Diane B. Anderson, District 6
 David A. Pitts, District 7 and Chairman



Community Stakeholders

We also appreciate 476 respondents to the Community Survey and the many stakeholders who participated in interviews, focus groups, and leadership meetings:

Dawn Marie Ardel, Laurens County Safe Home
 Adele Alducin, Main Street Clinton
 Dan Blakely, Piedmont Tech CAM
 Ann Blanton, AstenJohnson
 Jack Brown, THS Constructors
 Nate Brown, Laurens Electric Coop
 Lummus Byrd, Jr.
 Alesia Carter, United Way of Laurens County
 John Clayton, Laurens County Advertiser
 Nancy Coleman, Laurens County School District 55
 Captain Heath Copeland, Laurens Police Department
 Gary Daniels, Wells Fargo
 Ted Davenport, Laurens County Water & Sewer
 Monte Dutton, Go Laurens | Go Clinton
 Erin Farris, S&ME
 Kevin Franklin, State Farm Insurance
 Lisa Faulkner, Laurens County School District 55
 Jeff Field, Laurens County Water & Sewer Commission
 Morris Galloway, Laurens County Community Foundation
 Susan Galloway, Clinton Canopy
 David Hardy, Jr., Laurens County Fair Association
 Brain Harlan, Lakelands YMCA
 Ty Hawkins, BLE
 Peyton Howell, Harper General Contractors
 Jonathan Irick, Main Street Laurens
 Kimberly Kitchens, Servpro of Newberry and Laurens
 Thilo Kock, Alupress
 Mayor GP McLeer, City of Fountain Inn
 Nelson Lindsay, SC Commerce

Tom Martin, Burr Forman McNair
 Jim Moore, Laurens County Fair Association
 Amanda Munyan, Laurens County Chamber of Commerce
 Robin Mathis, Alupress
 Bud Marchant, Trails Association
 Mayor Bob McLean, City of Clinton
 Ed Murray, Laurens County School District 55
 Sharon O'Bryant Piedmont Rural Telephone Coop
 Melissa Patton, RE/MAX
 Janice Pilgrim, Walmart
 Mayor Nathan Senn, City of Laurens
 Aryele Redmond, United Way of Laurens County
 Gwen Seagraves, Fibertex Nonwovens
 Brenda Schrantz, Laurens County School District 56
 Rob Sheffield, Laurens County School District 55
 Dale Satterfield, Laurens County Public Works
 Brand Sanderson, Thomas & Hutton
 Bobby Smith, New Horizon Electric Co-op
 Tiffany Tate, Upstate SC Alliance
 Adam Taylor, Lander University
 Monica Taylor, Laurens County Disabilities & Special Needs
 Jerre Threatt, Presbyterian College
 Heather Tiller, Clinton Canopy & Century 21
 Debbie Vaughn, Laurens County Museum Association
 Megan Walsh, Clinton City Council
 Jayhue Weisner



About this Report

This Discovery Report combines extensive statistical analysis with input heard through stakeholder engagement across Laurens County to provide a holistic assessment of the County's competitive economic development position. The findings of this report will be utilized to identify opportunities and priorities in the following Economic Development Strategy. This report contains the following sections:

Discovery Narratives

This section describes key themes and opportunities that emerged through the Discovery process. They are drawn from in-depth data analysis, findings from the community survey, conversations with stakeholders, and the consulting team's perspective on global trends in economic development. The discovery narratives will be taken into account when developing the strategic framework.

SWOT Analysis

This Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis provides an overview of where the County stands today. Conclusions are drawn from in-depth data analysis and stakeholder input. The findings in this section will allow the consulting team to refine and validate the region's target industries and identify priorities to include in the Strategy.

Appendix 1: Economic & Demographic Evaluation

This Appendix includes in-depth data analysis and benchmarking that lays the foundation for understanding Laurens County's current economic position. This research underlies many findings in this Discovery Report.

Appendix 2: Target Cluster Evaluation

This section includes an evaluation of current target performance of various industries in Laurens County. The evaluation identifies which industries are growing in the region and presents the best opportunity for LCDC to grow its economy.

Appendix 3: Community Survey Results

This Appendix summarizes all findings from the community survey conducted from October 2019 – December 2019.



02

Discovery Narratives

Discovery Narratives Introduction

When the findings of the Discovery analyses are taken as a whole, several clear opportunities are revealed for Laurens County. These discoveries are drawn from the data analysis, the SWOT Analysis, findings from the community survey, conversations with stakeholders, and the consulting team's perspective on global trends in economic development. Though not intended to be specific recommendations at this stage of the planning process, these opportunities will be taken strongly into consideration when developing the strategic framework. Additional information on each one is presented in the following pages. They include:



Manufacturing Rebounds



Growth in Jeopardy



Increasing Overall Prosperity



Better Than Just Average



Unifying Laurens County



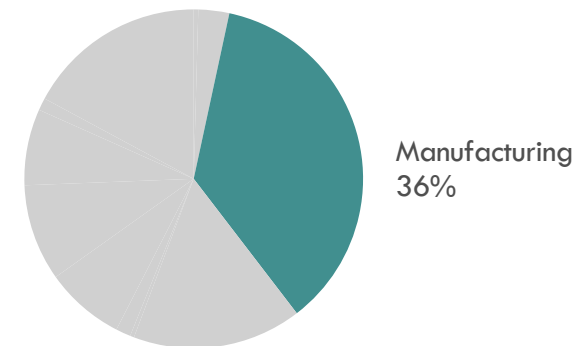
Manufacturing Rebounds

The textile industry was once the backbone of Laurens County's economy and its way of life. Like many of its sister communities in the Upstate, the closure of these mills decades ago left Laurens County struggling to reestablish its economy and identity. BMW's arrival to the region in the early nineties laid the foundation for the resurgence of manufacturing. Today, manufacturing is the leading economic driver in Laurens County, representing more than 36% of total employment. Manufacturing has also added 3,600 jobs to the county since the end of the Great Recession and is the county's highest paying industry.

Laurens County is ideal for manufacturing. It is well-positioned in a state and region which are manufacturing powerhouses. The county's location is also very important because it provides easy access to the interstate and inland port and has strong rail infrastructure. Laurens County has been very proactive in investing in product development over the years, both in industrial parks and speculative buildings. One of the most strategic investments, however, was the establishment of the Piedmont Technical College Center for Advanced Manufacturing. This unique educational institution provides local students and workers with skills needed to be successful in manufacturing right in their hometown. The industry is also supported by numerous other local and state-level workforce initiatives.

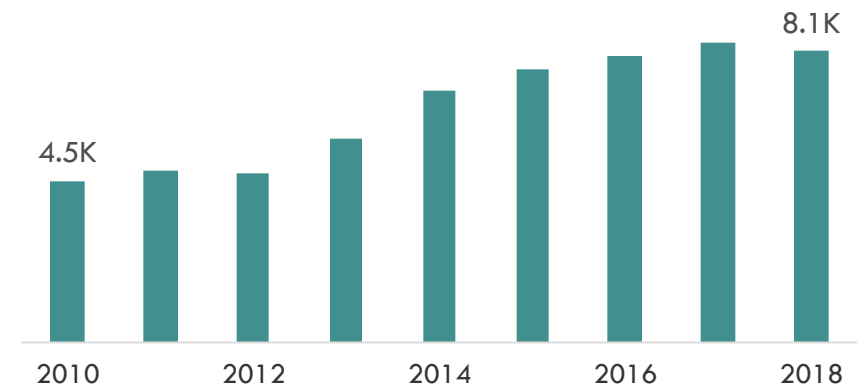
It is important that LCDC and its partners continue to proactively strengthen and diversify this industry to ensure economic resiliency in the future. This Strategy will identify tactics related to growing and developing a pipeline of talented workers, preparing workers for automation and other advances in the industry, maintaining diversity in the industry to protect from shakeups, and investing in local infrastructure, like roads and broadband, needed to support modern manufacturing operations.

MANUFACTURING % SHARE OF TOTAL EMPLOYMENT
LAURENS COUNTY, 2018



SOURCE: BUREAU OF LABOR STATISTICS / AVALANCHE CONSULTING

MANUFACTURING EMPLOYMENT GROWTH
LAURENS COUNTY, 2010 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. BUREAU OF LABOR STATISTICS





Growth in Jeopardy

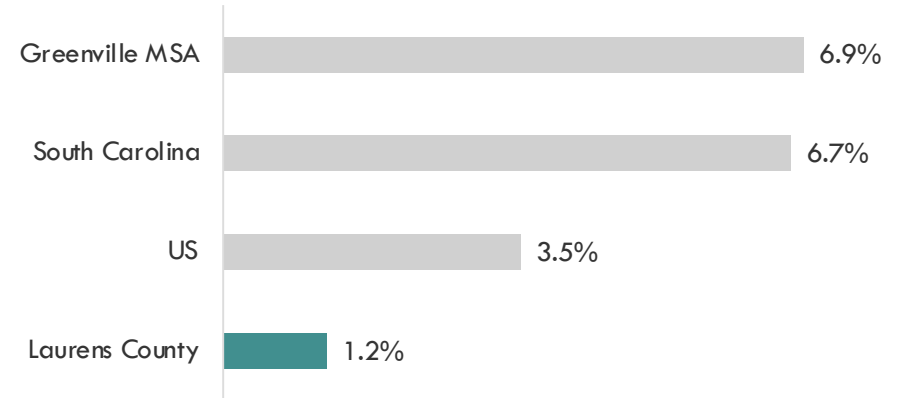
Both the Upstate region and the state of South Carolina experienced strong population growth over the past five years. Unfortunately, during a period of 7% growth in the Greenville MSA and South Carolina, Laurens County's population growth has remained relatively stagnant at just above 1%. Notably, communities bordering Laurens County – Fountain Inn, Woodruff and Enoree – experienced double-digit increases which, over time, is anticipated to spill over into Laurens County. Given these conditions, it is imperative that Laurens County both accelerate its own growth and proactively plan for the growth that trickles in from its neighboring counties.

Laurens County should be seeing more population inflow than it is, especially considering the region's growth. It offers career opportunities in high-growth fields like Manufacturing, Healthcare, and Logistics. It also offers a lower cost of living. This begs the question: what is preventing growth from occurring?

Quality of life appears to be an impediment to growth in Laurens County. Stakeholders participating in this strategic planning process cited a lack of housing variety, especially affordable housing, as a barrier to attracting residents. They also mentioned the negative perception of Laurens County schools as compared to other schools in the region. Other factors include higher rates of crime, a shortage of shopping, dining, and entertainment amenities, and incohesive land use.

Laurens County leaders must work together to attract the population needed to spur vibrancy in its communities and to support its economy. In the Strategy, recommendations around this theme will focus on preparing the County for future growth, making investments in infrastructure and quality of life amenities, and positioning Laurens County as not just a desirable place to work, but also a desirable place to live, raise a family, start a business, and be part of a community.

POPULATION GROWTH
2013 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

WHAT ONE THING WOULD YOU CHANGE? EXCERPTS FROM THE COMMUNITY SURVEY

*“More **retail options and dining options** other than fast food. People drive 30-45 mins just to shop and eat a good meal.”*

*“We need to have **zoning** to create better diversification across the county.”*

*“More housing in general, as well as **affordable housing options for residents 25-35.**”*

“Improve image as a business-friendly destination.”





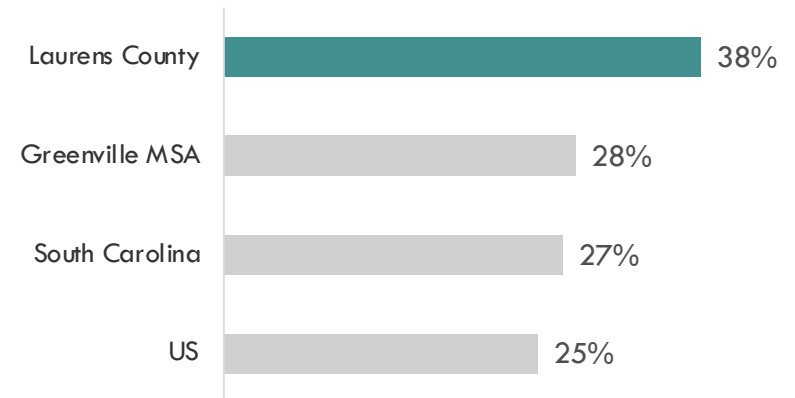
Increasing Overall Prosperity

Laurens County's recent economic development achievements have been remarkable. The significant increase in jobs and investment over the past five years alone have led to a 38% growth in total payroll by employers in the county. Unfortunately, not all residents have benefitted from this wealth of opportunity. As of 2018, nearly 20% of residents in Laurens County lived in poverty. When asked, participants in this planning process believe that this is largely generational poverty that resulted from the fall of the textile industry. Once those operations shuttered, workers did not have the skills or education to transition into different industries.

Generational poverty can be even more difficult to address in rural areas where access to jobs, resources, and public transportation are scarcer. Additionally, children who grow up in poverty often face greater struggles with their health, academic achievement, and overall well-being. While there is no easy solution, providing high-quality education for all children with awareness and pathways to local career opportunities, much like the Higher Opportunity and Laurens County Future Scholarship initiatives, is a great place to start.

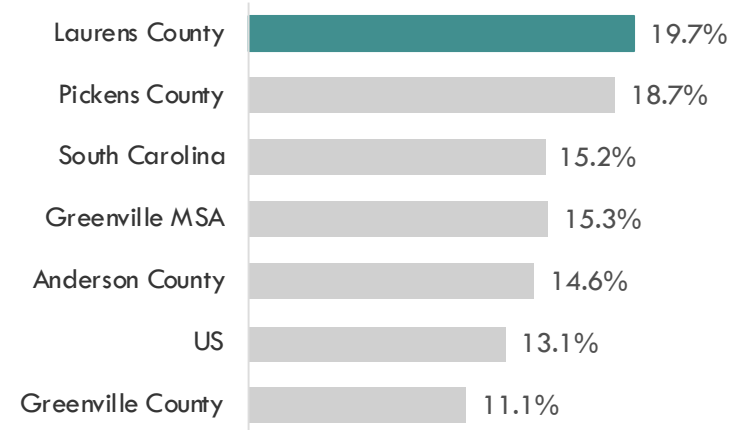
Boosting prosperity is somewhat outside of the LCDC's traditional role of economic development, but the LCDC can leverage its position to convene community-wide partners – like nonprofits, faith leaders, social services, educators, workforce developers, and select private sector partners – in a conversation about how this topic is relevant to economic development. An increased focus on boosting prosperity in Laurens County will require finding opportunities to enhance resources for underserved residents and communities, tailoring the promotion of training and career opportunities to both children and adults, planning for more affordable housing, and investing in quality of life amenities that benefit the entire community.

GROWTH IN TOTAL PAYROLL
2013-2018



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS, QCEW

POVERTY RATE
2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS SMALL AREA INCOME & POVERTY ESTIMATES





Better Than Just Average

Laurens County was overwhelmingly rated “average” on almost every measurement on the community survey. Even the LCDC’s performance was given average ratings, which was surprising given its success generating new capital investment and job growth. While there is always room for improvement, to say that Laurens County is “average” across the board likely speaks to a greater need for communication and celebration in many areas. It should also be recognized that creating more jobs and investments is not the only answer to the community’s challenges and that everyone has a role in increasing overall prosperity in Laurens County.

Internal communications has become an increased focus for economic development organizations (EDOs) in recent years. Previously, communication efforts were primarily externally focused to audiences like site selectors or prospective companies. However, a lack of internal communication leads to misunderstandings about an EDO’s role and impact in the community. In Laurens County, this may have contributed to the LCDC’s “average” rating – locals are not aware of the significant rate of job growth and the LCDC’s role. Residents and workers have the potential to be strong cheerleaders for the community. Raising awareness of victories at home can also extend to and resonate with external audiences. It is important that the narrative shared by internal audiences is a positive one.

This Strategy promotes a holistic economic development effort for which there are many partners and performance measures. In addition to greater internal communications and celebrations, the need for a clearer articulation of goals, roles and responsibilities, initiatives, and their impact will be addressed in the Strategy.

RATINGS FROM THE COMMUNITY SURVEY

LAURENS COUNTY AS A PLACE TO LIVE



3.4 OUT OF 5 STARS

LAURENS COUNTY AS A PLACE TO WORK



3.2 OUT OF 5 STARS

PERFORMANCE OF LCDC



3.2 OUT OF 5 STARS

*“Publicize your county development more **with info around town, flyer, advertisement in the mailbox or on TV.** Most people probably don’t even know this exists.”*

-Survey respondent





Unifying Laurens County

Laurens County has many assets in place for a promising future. It is growing jobs. It has excellent education and training resources, with Presbyterian College, Piedmont Technical College and two school systems on the rise. The historic downtowns of Clinton and Laurens show potential for revitalization. There have been recent investments by Prisma Health into the local hospital. And these are only a few examples. However, a perceived undercurrent of tension between municipalities and leadership across the county hold it back.

Survey respondents, focus group attendees, and interviewees all cited the tension in Laurens County as a barrier to improving its economic and overall performance. Communities that work collaboratively towards a shared vision have a much higher rate of success than those that do not. These communities are more efficient with resources, more effective at advocating for key issues, have greater support and engagement from residents, and are more attractive to potential businesses and residents.

This Strategy is an opportunity to unite government officials, community leaders, major institutions, and local employers in a shared vision to be a place where residents thrive, businesses of all sizes grow, downtowns are vibrant, and quality of life soars. Since the success of this Strategy depends on Laurens County coming together, recommendations will look at how to improve communications, better align actions and resources, measure progress, and celebrate success.

COMMENTS FROM THE COMMUNITY SURVEY

*“Identify strengths and weaknesses of development across the county and **strategically drive industries, local government, and other stakeholders toward common goals of economic development and equity.**”*

*“Get Clinton and Laurens to **work together!**”*

*“Local **government lacks vision** as far as moving forward to improve economic development within the county.”*

*“**More interaction between residents and businesses** would help both the LCDC as well as the residents by **putting us on the same page and task.**”*

*“Continue to **educate decision makers and elected officials** on what it takes to land industry here. Help convince this group that raising taxes to **improve life and enhance economic growth of the County is a good thing.**”*



03

Target Cluster Recommendations

Target Cluster Recommendations

ABOUT TARGET IDENTIFICATION

Target identification is not a perfect science. Numerous factors inform business location decisions. As a result, there is no single mathematical formula for determining the eligibility of potential target industries for a community. Through a process of data analysis, a review of state and regional targets, and conversations with stakeholders, a set of target clusters have been identified as the focus for Laurens County's economic development efforts over the next five years. These clusters are tailored to the community assets and aspirations and represent the strongest opportunities for driving economic growth and wealth creation in the future. The full methodology and target evaluation are included in Appendix 2. Detailed profiles of each cluster – including specific strategies and the “Why Laurens County?” sales messages for each – will be provided as part of the final strategy report.

Four filters are examined when identifying target industries, illustrated below. The analysis begins with a global view of whether an industry is growing, and then it filters through an increasingly local lens until a target industry is confirmed. Throughout the process of identifying targets, the consulting team considers whether the industry will increase diversity in the region's economy and provide career pathways for residents with different skill levels. Although this process appears linear, the consulting team considers numerous additional factors throughout the assessment of potential target industries. (Note, Appendix 2 presents additional detail on the targeting process.)



1. Is the industry growing and projected to grow within the community and U.S.?

Examining global and national trends helps determine if the target industry will continue to grow and create future opportunities in Laurens County.

2. Which industry clusters have an existing presence in the community and region?

Industry clusters with an existing concentration in the Laurens County and the Upstate region demonstrate that there are local competitive strengths. They present some of the best opportunities for future expansion, recruitment, and startup growth.

3. Which industry clusters match the community's current and potential future assets?

During the Discovery phase, the consulting team examined assets across a wide variety of categories. Whether Laurens County has the assets needed (current or planned) to support future industry cluster growth is an important target selection filter.

4. Which industry clusters align with the community's goals and values?

Each cluster was evaluated on whether it reinforces the goals and values that were voiced by community stakeholders during interviews, focus groups, Steering Committee workshops, and the survey.

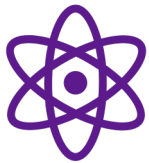
Target Cluster Recommendations

Three recommended target clusters for Laurens County are **primary employers**, those that export goods and services outside of the local economy. Primary employers are the focus of economic development initiatives because their exports inject new dollars into the economy, resulting in increased wages and jobs as revenue earned by the business is spent on employee salaries, as well as goods and services purchased from local suppliers. As more money is earned and spent, it is redistributed throughout the rest of the economy, multiplying in impact. In essence, primary employers offer the highest potential economic impact.



AUTOMOTIVE

The Automotive cluster involves the development and fabrication of entire automobiles as well as the production of individual components. Automotive plants have among the most extensive supply chains of any cluster.



ENGINEERED MATERIALS

Engineered Materials are considered the building blocks of advanced manufacturing. This cluster encompasses the research, development, manufacturing, and application of materials derived from innovations in metal, polymers, glasses, composites, and textiles. These materials are involved in the production of automobile, airplanes, healthcare devices, food packaging, construction materials and technical apparel, just to name a few.



FOOD MANUFACTURING

Food Production generally describes the process of turning purchased ingredients into packaged food and beverages for human and animal consumption. Food production and packaging has become increasingly technical over the past 30 years, with new technologies and machinery assisting the processing, cooking, and packaging of products.

The last target falls into the category of **secondary employers**, which serve the local community. A majority of the goods and services created by secondary employers are consumed within the community. While the multiplier effect of spending is less than that by primary employers, these goods and services are important staples of a community. They enhance the community's quality of life, which helps retain and attract residents – a topic particularly important to Laurens County.



EXPERIENTIAL RETAIL, RECREATION & TOURISM

Experiential Retail, Recreation & Tourism involves unique leisure-oriented experiences. For Experiential Retail, this may involve distinctive in-store experiences unavailable from an online retailer. Recreation & Tourism may include traditional sightseeing destinations such as a museum or historical site, or pursuits such as a corn maze, hiking, or crafting workshop.

04

SWOT Analysis

SWOT Analysis Introduction

This Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis provides a summary of where Laurens County stands today. Conclusions are drawn from in-depth data analysis, findings from the community survey, conversations with stakeholders, and the consulting team's perspective on global trends in economic development.

The findings in this section will allow the consulting team to refine and validate the community's target clusters and identify priorities to include in the Strategy. Strengths provide differentiating selling points that can be incorporated into Laurens County's pitch to its target clusters. Opportunities, challenges, and threats are platforms for taking action, inspiring recommendations in the forthcoming Strategy to make Laurens County even more prosperous in the future.

Strengths

- Laurens County has seen strong economic growth over the past five years, with 21% employment growth from 2013-2018. This is greater than the Greenville MSA, South Carolina, and the U.S.'s employment growth.
- Manufacturing, which represents 36% of employment in Laurens County, has increased employment by 3,600 jobs since the end of the Great Recession.
- Laurens County has very low unemployment at 2%, which is lower than the U.S. and South Carolina's unemployment rates.
- Laurens County is home to numerous international companies that bring diverse people and business interests to the community.
- Laurens County is well-positioned geographically. It is close to strong economic centers in Greenville and Spartanburg, has Highways 385 and 26 intersecting in the county, has access to a CSX rail line, and is close to the Greenville-Spartanburg International Airport and SC Inland Port Greer.
- Laurens County is known within the Upstate for having a great inventory of available sites and buildings. There are shovel-ready sites available for development in Laurens County, as well as industrial parks and spec buildings that are ready for new business tenants.
- Laurens County is a SC Work Ready Community.
- The Higher Opportunity initiative is a well-marketed career resource that informs residents and students about the education and job opportunities available in Laurens County, as is the annual Business & Industry Showcase.
- South Carolina is recognized for its workforce training programs like readySC™ and Apprenticeship Carolina.
- Laurens County school districts excel in several areas. The school districts are home to an excellent robotics team, the #1 Automotive Technology program in the nation, and a nationally-ranked Science Olympiad team. They also offer dual enrollment programs.
- The Laurens County Future Scholarship Program and SC Promise are valuable initiatives that make higher education accessible and more affordable.
- Piedmont Technical College and its Center for Advanced Manufacturing provide excellent education and skills training resources for Laurens County residents and students. It is a unique institution that focuses on developing skills that are in need by Laurens County employers and offers a cost-effective path to a career, compared to a four-year college.
- Piedmont Technical College offers the South Carolina Manufacturing Certification program, which provides valuable credentials and soft skills training.
- Laurens County has a higher share of workers with associate degrees than the Greenville MSA, South Carolina, and the U.S. 11% of Laurens County residents hold an associate degree versus 10% or fewer in Greenville, South Carolina and the U.S.
- Nearby Clemson University and its International Center for Automotive Research house strong manufacturing and engineering programs and are well-known for their partnerships with industry.
- Laurens County has a low cost of living compared to surrounding areas. Laurens County's cost of living index is 97, compared to 99 or 100 for the Greenville MSA, South Carolina, and the U.S.



Strengths

- Presbyterian College is an excellent educational resource, and talent attractor for Laurens County. Presbyterian College can both create skilled graduates and attract outside talent to either attend the College or work at the College, especially in its graduate programs of Pharmacy, Physician Assistant, and Occupational Therapy (2021).
- Presbyterian College offers cultural amenities to both students and the greater community, like local and touring artists, musicians, performances, speakers, and cultural exhibits.
- Presbyterian College offers students the opportunity to transfer to Clemson, the University of South Carolina, and other schools after two – three years and graduate. This is not well publicized but could be a great perk and cost saving measure for Laurens students.
- Laurens County and its communities have small town, charming personalities that residents and visitors enjoy. Stakeholders cited feeling close to their neighbors, having plenty of land and green space, and low traffic as perks of the small-town lifestyle.
- The acquisition of Laurens County Hospital by Prisma Health has led to increased investment and resources into the community's health system. Scores for and services offered by the hospital have greatly increased in recent years as a result.
- Laurens County has a rich history that is reflected in its historic downtowns and buildings. Its unique quality of life assets include Lake Greenwood, Lake Rabun, and numerous parks and historic sites. Both Clinton and Laurens offer numerous annual events and festivals and are part of the South Carolina Main Street Association.
- Downtown Clinton has especially good access to transportation for businesses. Clinton has both direct access to a CSX rail line and the Port.

Weaknesses

- Population growth is stagnant in Laurens County. However, some cite the low population growth statistics as possibly due to skewed national data and not necessarily reflective of Laurens County's actual numbers.
- Laurens County has a lower average annual salary than the Greenville MSA, South Carolina, and the U.S. While this is attractive for companies looking to benefit from lower labor costs, it can contribute to higher poverty levels and commuting for higher wages.
- Heavy commuting into and out of Laurens County puts a strain on infrastructure. The 22,000 Laurens County residents who work outside of the community also represent lost retail dollars.
- Laurens County has a lower labor force participation rate than the Greenville MSA, South Carolina, and the U.S.
- Several employers cite difficulties finding and retaining talent. In particular, soft skills are in high demand. Historically low unemployment rates make finding workers even more of a struggle.
- The average age of residents in Laurens County, at 41 years, is several years older than the region and state averages. Additionally, the percentage of young professionals in Laurens County is the lowest among benchmarks.
- Laurens County schools have a reputation for not being as academically successful when compared to other school districts in the region. They lag schools in the Greenville MSA and South Carolina schools on key metrics of academic performance. For 3rd grade reading and writing scores, only 33% of Laurens County students meet expectations versus 45% in South Carolina and 52% in the Greenville MSA. For 9th grade algebra, 50% of Laurens County students meet expectations compared to 54% in South Carolina and 61% in the Greenville MSA.
- Laurens County School Districts 55 and 56 have older facilities, which deter families from sending their kids to either district and promotes the perception that Laurens County schools are of a lower quality.
- Laurens County has the lowest medium household income compared to the Greenville MSA, South Carolina, and the U.S. Laurens County workers on average make \$44,000 per year, which is lower than the state average (\$10,000 less), the MSA average (\$11,000 less), and U.S. (\$16,000 less).
- The poverty rate in Laurens County is nearly 20%.
- Crime rates in Laurens County, especially violent crime, are considerably higher than the rest of the MSA and South Carolina. Some areas of Laurens County are also experiencing drug and addiction issues.
- The housing inventory in Laurens County lacks variety. Laurens County has a shortage of affordable housing, multi-family, and mixed-used options that are especially appealing to young professionals and young families.
- Overall bridge and road infrastructure is in desperate need of repair.
- Although Laurens County has some quality of life amenities, stakeholders generally feel that shopping, dining, and entertainment options are lacking. It is suspected that this is a reason why the county has low population growth.



Weaknesses

- Laurens County has almost no public transit system, so residents and workers without a car are significantly limited when it comes to accessing jobs or quality of life amenities.
- There are very limited resources for entrepreneurs in Laurens County.
- The gateway corridors throughout Laurens County need beautification. Additionally, vacant buildings and mill properties across Laurens County create a negative image of a dilapidated, desolate community to outsiders, which is bad for both internal and external marketing.

Opportunities

- There are numerous workforce and education training initiatives from dual enrollment programs, scholarships, career awareness, that are gaining in popularity and need more resources. For example, the community's dual enrollment programs are so popular that they have been unable to accept every student who is interested, due to space limitations.
- The Upstate SC Alliance's Move Up initiative provides an excellent platform to promote Laurens County to external audiences.
- The upcoming vote on the penny sales tax could provide funding to make necessary improvements to Laurens County infrastructure, schools, quality of life amenities, and more. if it passes.
- New leadership in key organizations and local government across the County has created a more collaborative environment than in the past, setting up new leaders for success.
- The Carolina Connect program can help improve poor broadband access throughout Laurens County.
- Laurens County's strong industry growth presents an opportunity for additional growth by attracting other businesses in those fields, especially as the Greenville and Spartanburg markets become more saturated.
- Laurens County's natural resources and outdoor recreational amenities can attract new residents and open the Lake Greenwood area to new homes and development. If strategically planned and developed, the Lake Greenwood area could become a highly desirable place to live and attract tourists.
- There is a lot of community support for revitalizing downtowns in Clinton and Laurens. Both cities are in the Main Street South Carolina programs. Main Street Clinton is currently part of the Aspiring Main Street program in order to become a Classic Main Street. The City of Laurens is an existing Classic Main Street community and is on year three of its strategic plan.
- Presbyterian College provides many of amenities that are relevant to the entire community, not just to students, and those opportunities to engage in classes, entertainment, or events could be better publicized and taken advantage of by more Laurens County residents.
- Recent changes to building codes in the City of Laurens has made it easier to redevelop historic buildings.
- New programs like Family Promise of Laurens County provide an opportunity to reach and provide support families in poverty.
- The possible extension of the Prisma Health Swamp Rabbit Trail around Fountain Inn and around the hospital can be a catalyst for small business growth and increased livability.



Threats

- Housing availability and the lack of new and diverse residential development in Laurens County threatens future population growth. Teachers, young professionals, and some manufacturing workers may have to seek housing outside the community.
- Leadership within the community is not working collaboratively. This will not only affect LCDC's economic development efforts, but also dampen other community development efforts, such as main street revitalizations, talent attraction, and community pride.
- Some stakeholders engaged in this planning process feel that there is a lack of involvement and investment from major employers in the community. There is a sense of frustration about any expressed demands from companies.
- A lack of zoning and land use planning makes investments in infrastructure even more difficult to prioritize in Laurens County, which in turn hinders both commercial and residential development.
- Threats of rising tariffs and trade wars can and have had an impact on the Upstate's automotive industry. It may impede future growth in manufacturing.
- The regulatory environment of Laurens County and its municipalities has not kept up with some highly desired quality of life amenities. Outdated laws regarding serving food or alcohol may hinder development of quality of life amenities.
- Some citizens and leaders are resistant to change in Laurens County and are vocal about their opinions.
- Turnover in companies, especially among plant managers, makes it difficult to establish relationships with firms when looking to create a long-term partnership for community engagement.
- Laurens County residents and workers tend to have a more negative view of the county than outsiders, which can make both internal and external marketing more difficult.
- LCDC has limited resources, forcing them to do more with less and limiting their ability to undertake larger economic development efforts.
- A lack of internal communication between LCDC and residents has contributed to public misunderstanding of the LCDC's role and impact.



Appendix 1

Economic & Demographic Scan

Employment Growth

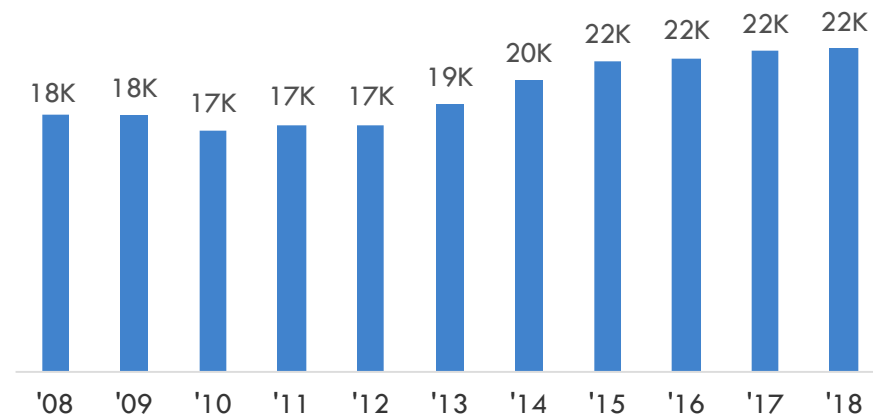
In recent years, job growth in Laurens County has significantly outpaced that of the Greenville-Anderson-Mauldin, SC Metro Area, the state, and the U.S. After a slight drop in employment following the recession, employment in Laurens County has grown steadily since 2013 – reaching nearly 22,500 in 2018.

From 2013 to 2018, employment grew by 21% in Laurens County – more than double the growth of the U.S.

WHY IS THIS IMPORTANT?

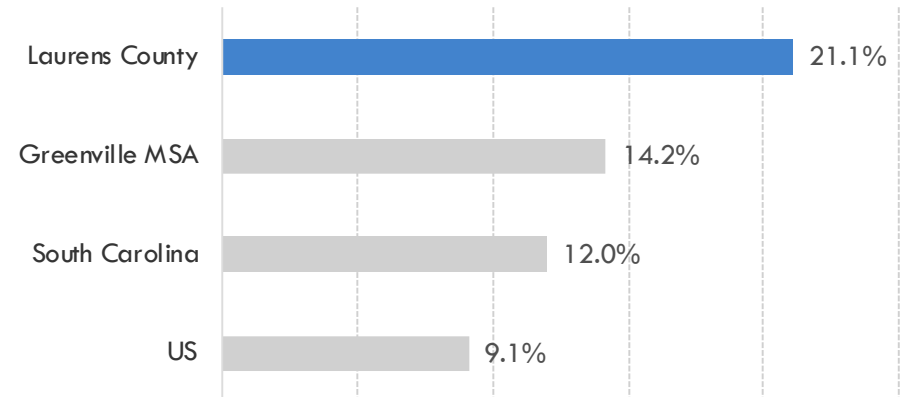
Employment growth is a primary indicator of a community's overall economic health. Strong job creation relative to benchmark communities can indicate a more competitive business climate and the presence of supportive resources.

LAURENS COUNTY TOTAL EMPLOYMENT, 2008 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. BUREAU OF LABOR STATISTICS

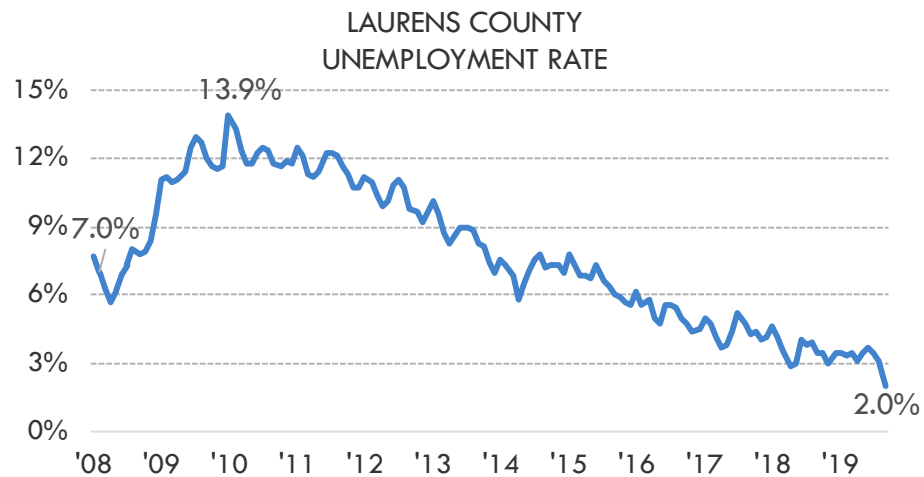
EMPLOYMENT GROWTH
2013 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. BUREAU OF LABOR STATISTICS

Unemployment

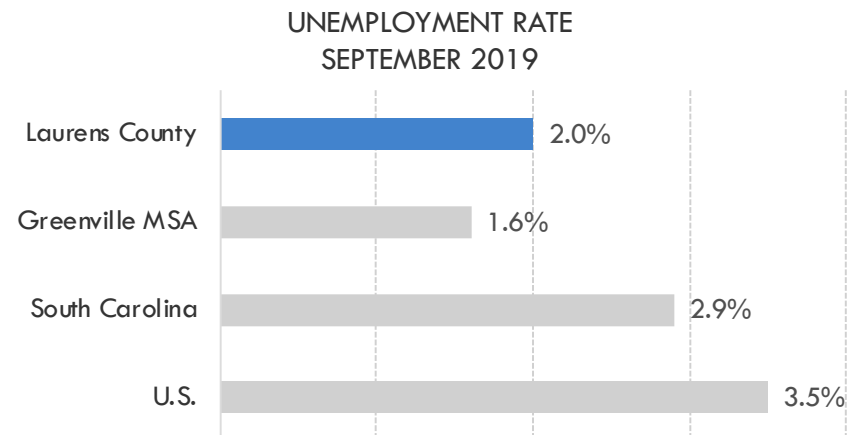
Unemployment in Laurens County has fallen steadily since its peak in mid-2010 – reaching a low of 2% in September of 2019. Unemployment rates in Laurens County slightly exceed those of the Greenville-Anderson-Mauldin MSA, but they are slightly lower than South Carolina (2.0%), and significantly lower than the U.S. (3.5%).



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS

WHY IS THIS IMPORTANT?

Low unemployment is generally a positive sign – indicating that those residents of a community actively looking for work are finding jobs. It can also highlight challenges – revealing that new and expanding employers have a smaller pool of available workers from which to draw or that workers may be exiting the labor force entirely.



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS



Industry Diversity

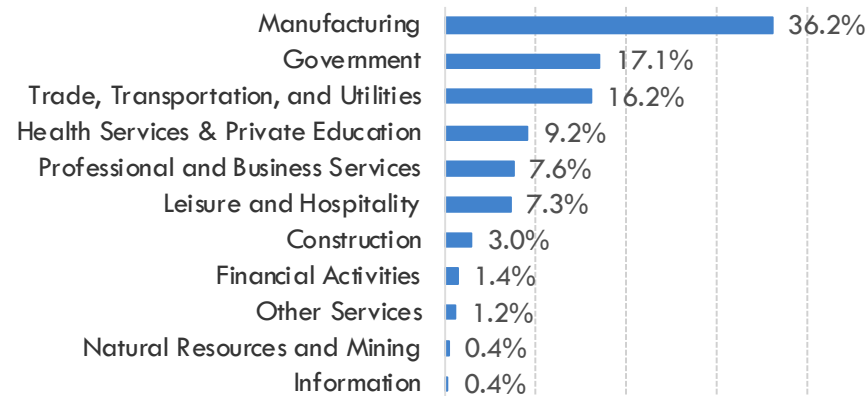
More than one-third of employment in Laurens County (36% of jobs) is supported by the Manufacturing industry. The next largest industries in Laurens County are Government (17%), Trade and Transportation (16% - including Retail), and Health Services & Private Education (9%).

Job growth in Construction and Manufacturing jumped 44% and 42%, respectively, from 2013 to 2018. Other fast-growing industries include Leisure & Hospitality (25% job growth), Professional & Business Services (25%), and Natural Resources (20%). Job losses in Information primarily reflect classification changes in cable installation operators.

WHY IS THIS IMPORTANT?

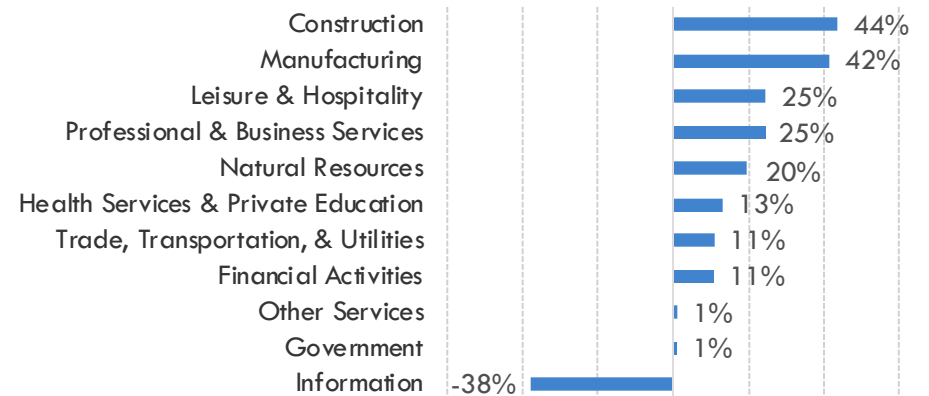
Resilient economies employ residents across a diverse mix of industries. A diverse industry base allows communities to better weather economic downturns that affect one industry more than others. A diverse economy also provides a variety of jobs with different educational and experience requirements.

LAURENS COUNTY SHARE OF TOTAL EMPLOYMENT
BY MAJOR INDUSTRY, 2018



SOURCE: AVALANCHE CONSULTING / U.S. BUREAU OF LABOR STATISTICS

LAURENS COUNTY EMPLOYMENT GROWTH BY MAJOR INDUSTRY
2013 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. BUREAU OF LABOR STATISTICS



Industry Salaries

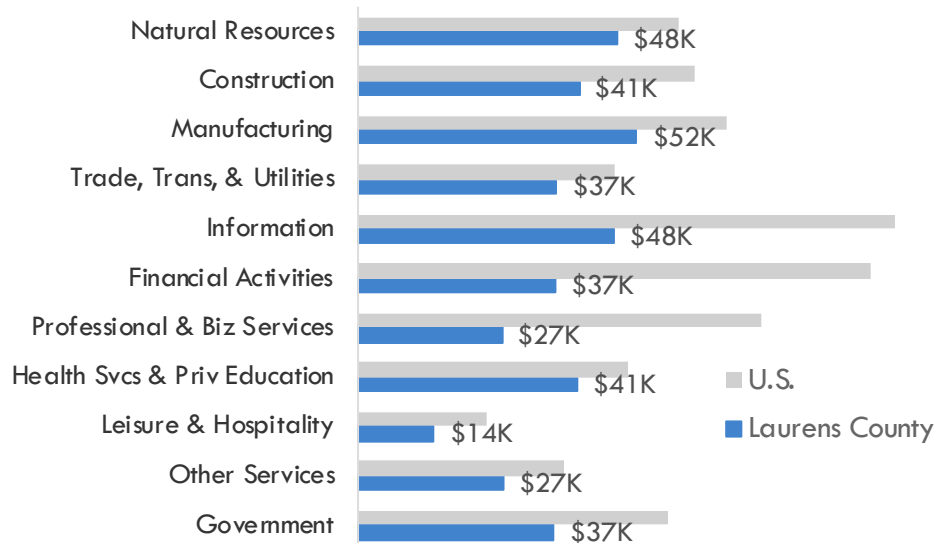
At \$40,396, the average annual salary in Laurens County is lower than South Carolina (\$44,729), the MSA (\$45,627), and the U.S. (\$57,366). These lower wages make Laurens County more competitive for business but can also explain the high commute rates.

Manufacturing pays the highest average salary in Laurens County. Other higher paying industries include Natural Resources (\$48,297), Information (\$47,770), and Health Services & Private Education (\$40,88). The salaries in Laurens County fall below the national average for all major industries.

WHY IS THIS IMPORTANT?

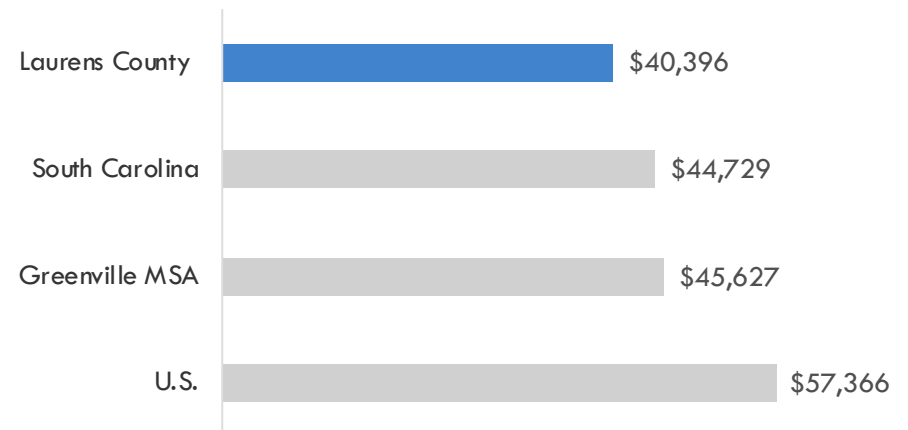
Examining salaries by industry helps reveal which local industries are more competitive for workers or where workers show higher productivity. Above average salaries may also indicate high demand for those workers in a community.

LAURENS COUNTY AVERAGE SALARY BY MAJOR INDUSTRY
2018



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS

AVERAGE ANNUAL SALARY
2018



SOURCE: AVALANCHE CONSULTING / BUREAU OF LABOR STATISTICS



Commuting Patterns

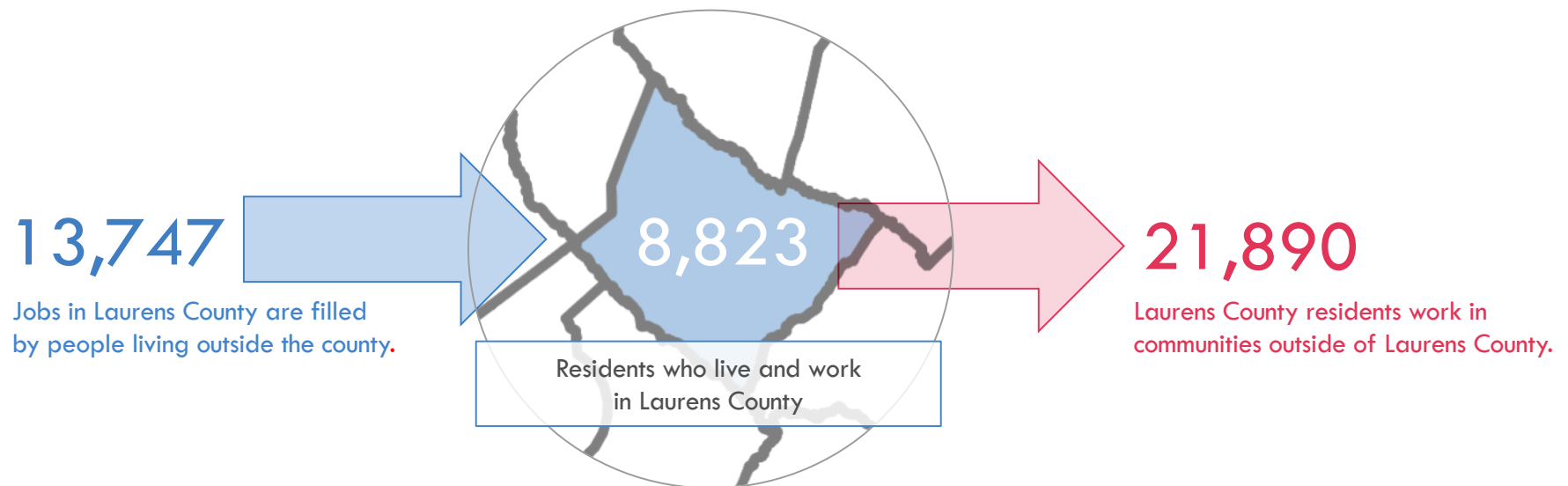
Significant differences exist between those who live in Laurens County and those who work in Laurens County.

According to 2017 data, 71% of Laurens County residents with jobs traveled outside the community for work. Only 29% both lived and worked in Laurens County. Additionally, 61% of jobs in Laurens County were filled by workers from outside the community.

WHY IS THIS IMPORTANT?

Examining commute patterns offers special insight into a community's economy. Communities that can draw from available talents and skill sets outside of their political boundaries can significantly increase their available workforce. Additionally, communities with high outflows have an opportunity to recruit companies to employ their existing residents.

LAURENS COUNTY COMMUTER INFLOW/OUTFLOW ANALYSIS 2017



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS LODS ON THE MAP



Commute Destinations & Sources

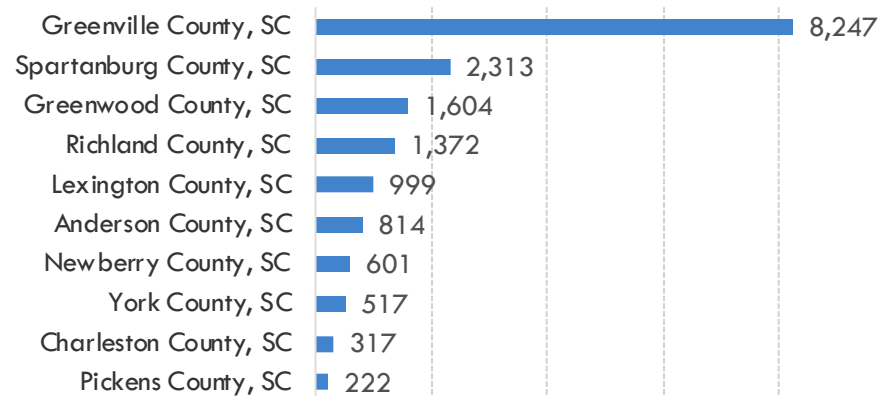
Laurens County both draws employees from and sends residents to work in a large range of surrounding communities. In 2017, the top sources of in-commuting employees were Greenville County (4,235 commuters), Spartanburg County (1,536), and Greenwood County (1,389).

The top employment destinations for out-commuting residents were also Greenville County (8,247 residents), Spartanburg County (2,313), and Greenwood County (1,604), as well as Richland County (1,372).

WHY IS THIS IMPORTANT?

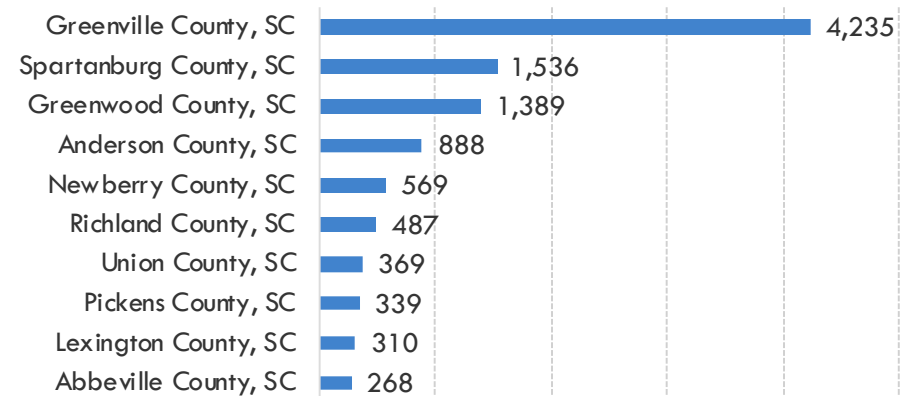
Examining commute patterns offers special insight into a community's economy. Communities that can draw from available talents and skill sets outside of their political boundaries can significantly increase their available workforce. Additionally, communities with high outflows have the opportunity to recruit companies to employ their existing residents.

TOP TEN DESTINATIONS OF OUT-COMMUTING RESIDENTS
2017



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

TOP TEN SOURCES OF IN-COMMUTING WORKERS
2017



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

Labor Force Participation

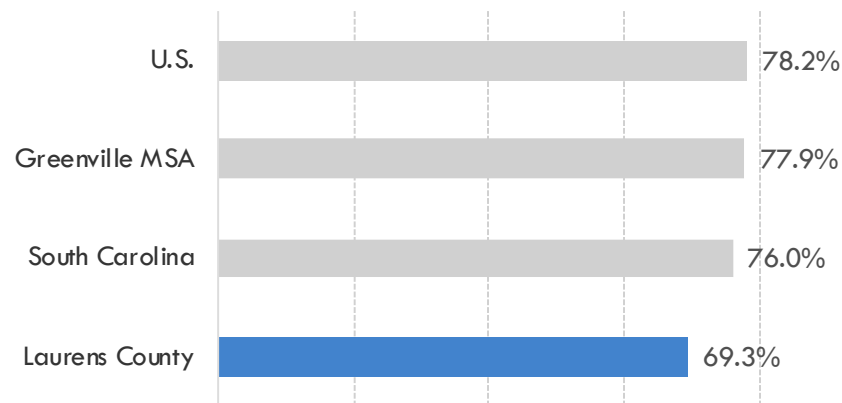
At less than 70%, the labor force participation rate in Laurens County is significantly less than the national, statewide, and regional average. Local labor force participation rates for individuals between the ages of 44 and 64 are especially low.

Minimal population growth in Laurens County, combined with declining labor force participation rates, have contributed to a contraction of the local labor force in recent years. Between 2013 and 2018, the active labor force in Laurens County fell approximatively 5%.

WHY IS THIS IMPORTANT?

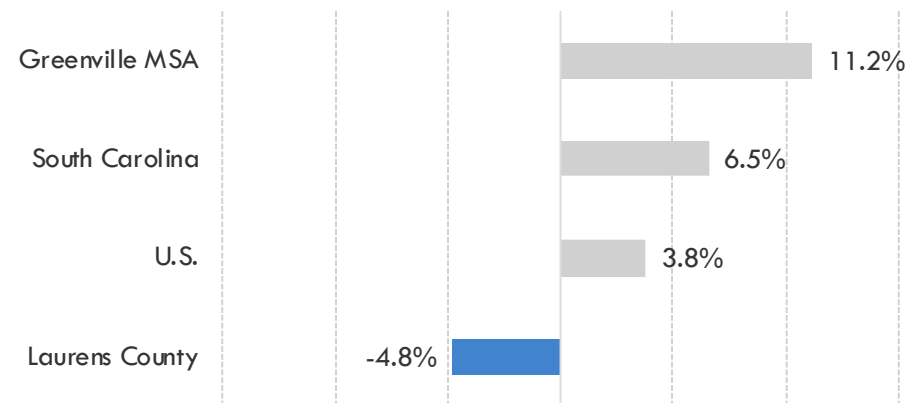
The size and characteristics of a community's labor force provides a direct measure of the available workforce for employers. In contrast to total population, the labor force measures the number of residents actively participating in the economy – either currently working or looking for work. Identifying the populations not participating in the labor force and understanding the barriers preventing or discouraging them from participating are important elements of modern workforce development strategies.

LABOR FORCE PARTICIPATION RATE – 25 - 64 YEARS OLD
2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

ACTIVE LABOR FORCE GROWTH – 25 - 64 YEARS OLD
2013 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU



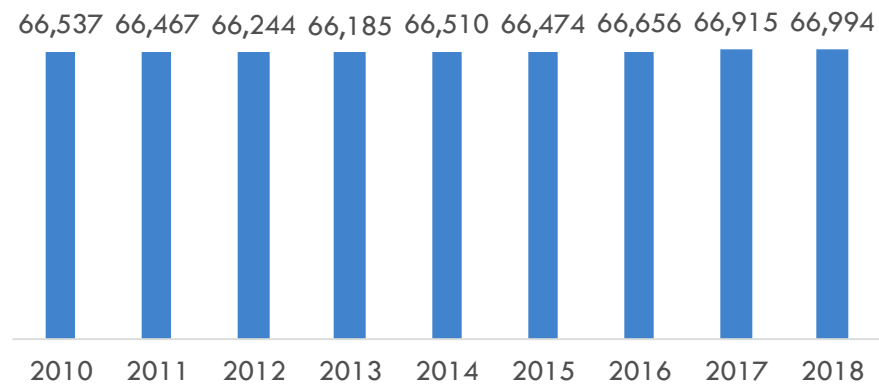
Population Growth

The population of Laurens County has changed little in recent years. Since 2010, the county's population has increased by fewer than 500 residents. The local population growth rate stands in stark contrast to the regional growth rate—between 2013 and 2018, the total population of the Greenville metropolitan areas increased nearly 7%.

WHY IS THIS IMPORTANT?

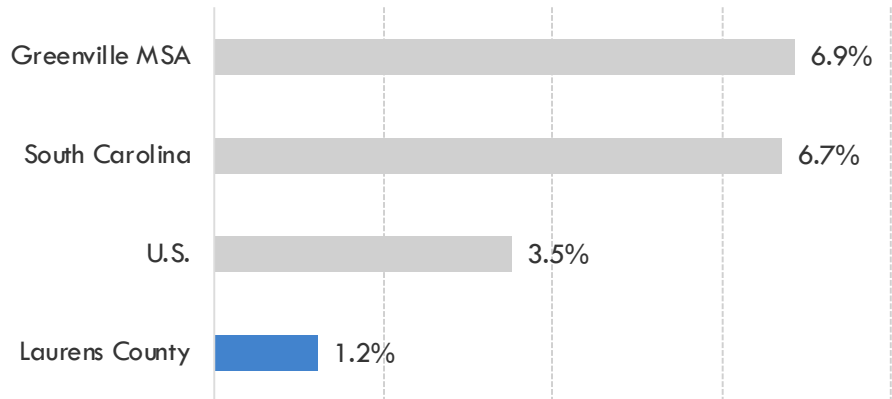
Population growth is one of the base indicators of overall economic prosperity in a community. A growing population shows that a community has assets and job opportunities that retain residents and attract new workers. A growing population also reassures businesses that they will have workers and customers in the future.

LAURENS COUNTY POPULATION
2010 – 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

POPULATION GROWTH
2013 – 2018



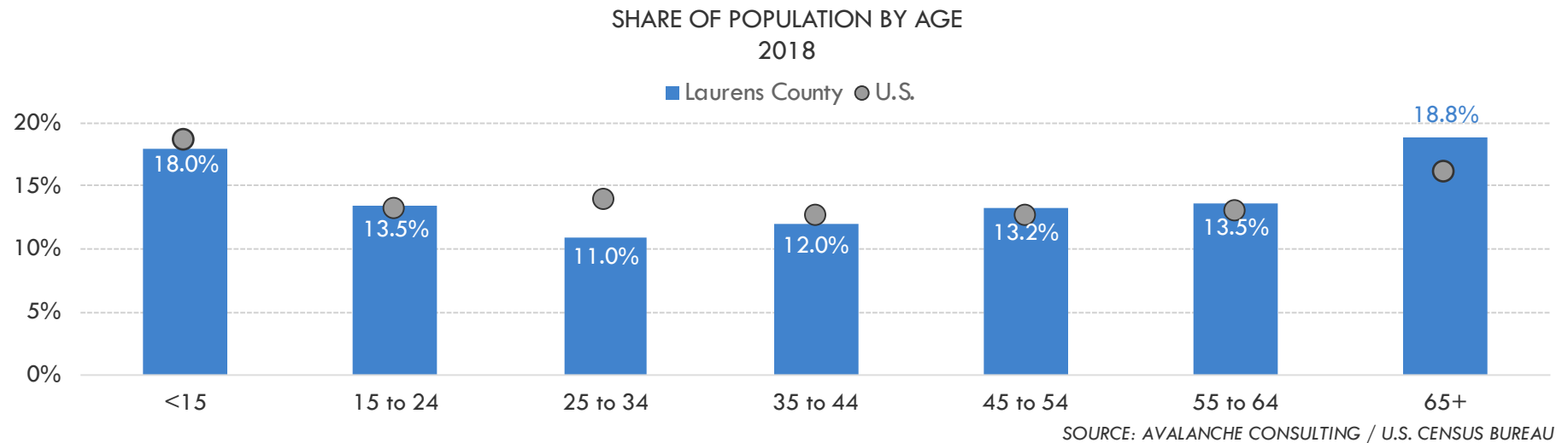
SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

Age Distribution

Laurens County's population is slightly older than the national average. Nearly 19% of the county's population is age 65 or older. Nationally, the figure is just 16%. Conversely, just 23% of Laurens County's population is between the age of 25 and 44, compared to 26% of the U.S. population.

WHY IS THIS IMPORTANT?

The age distribution of a population can help us better understand where to prioritize community investments. Changing age distribution within a community has widespread implications for public investments in areas such as health care, education, and workforce training. The age distribution also may highlight where tightness exists in the local labor market.

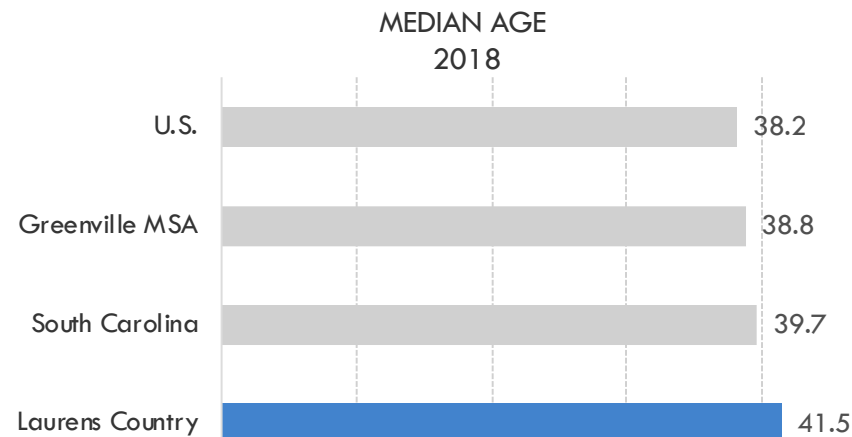


Age Composition

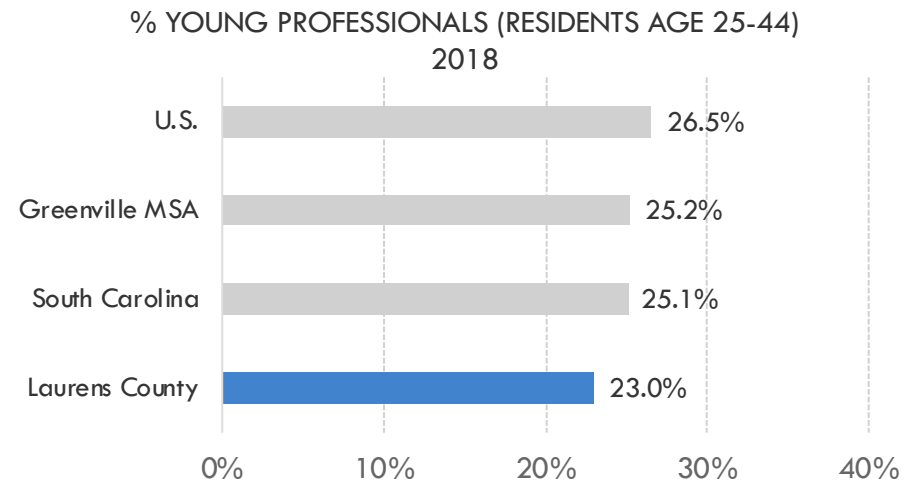
At more than 41 years old, the median age in Laurens County is two years older than the national or regional average.

WHY IS THIS IMPORTANT?

Young professionals (residents aged 25 to 44) represent a critical segment of a local workforce for companies seeking to hire new workers with the latest skills and knowledge. Recruiting and retaining residents in this age cohort helps ensure a community has a healthy mix of working age residents and can supply a growing labor force to local businesses.



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

Racial Diversity

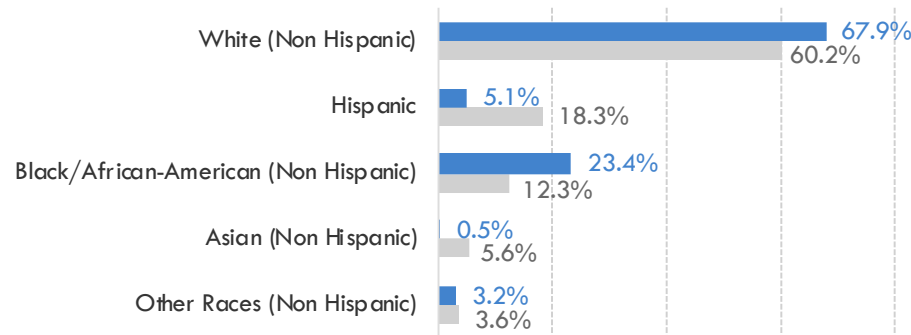
Laurens County has a higher proportion of White, Non-Hispanic and Black/African-American residents compared to the nation but a lower share of Hispanic and Asian residents. In recent years, however, virtually all population growth within Laurens County has been fueled by racial and ethnic minorities. Since 2013, the Asian population in Laurens County rose nearly 65%. The Hispanic population increased by 22%. During this same period, Laurens County's Black/African-American population contracted, and the White, Non-Hispanic population remained relatively flat.

WHY IS THIS IMPORTANT?

The racial diversity of a community is affected by local geography, history, industry trends, and culture. Research shows that a diverse population and inclusive policies contribute to a thriving economy.

POPULATION BY RACE & ETHNICITY
2018

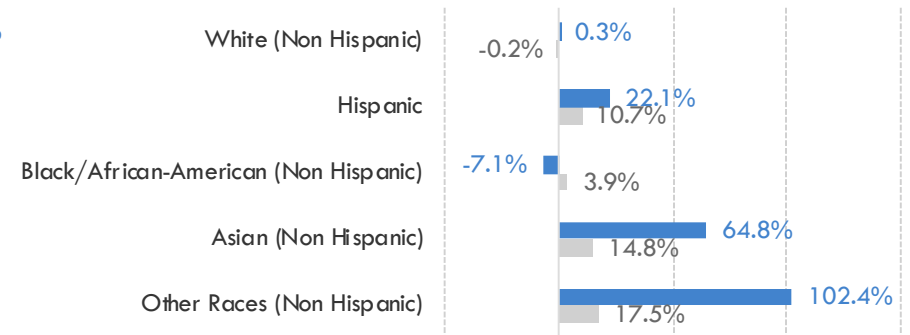
■ Laurens County ■ U.S.



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

POPULATION CHANGE BY RACE & ETHNICITY
2013-2018

■ Laurens Co. ■ U.S.



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

Student Achievement

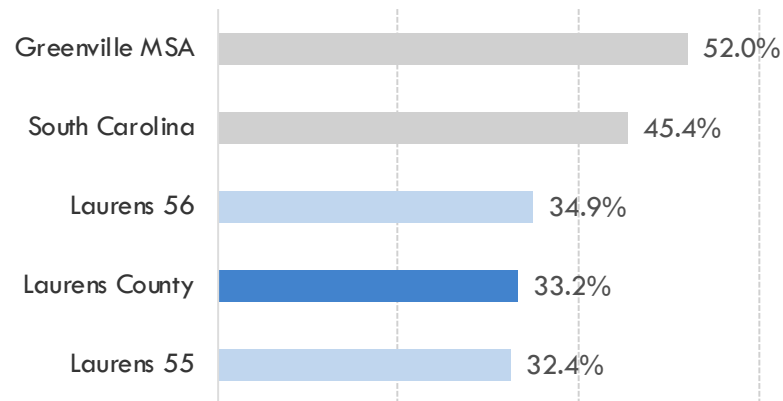
Student achievement in Laurens County, especially on key assessments in Reading & Writing and Algebra, are substantially lower than state or MSA averages. Only a third of students in Laurens County either meet or exceed expectations on Reading & Writing in grade 3. This number is more than 10% lower than the state average and nearly 20% lower than the Greenville MSA. Students performed better on assessments in Algebra, only falling behind the state and MSA by 5% and 10%, respectively.

WHY IS THIS IMPORTANT?

Reading proficiency by grade 3 and the ability to solve higher-level math problems by grade 8 are strong predictors for future academic and life success.

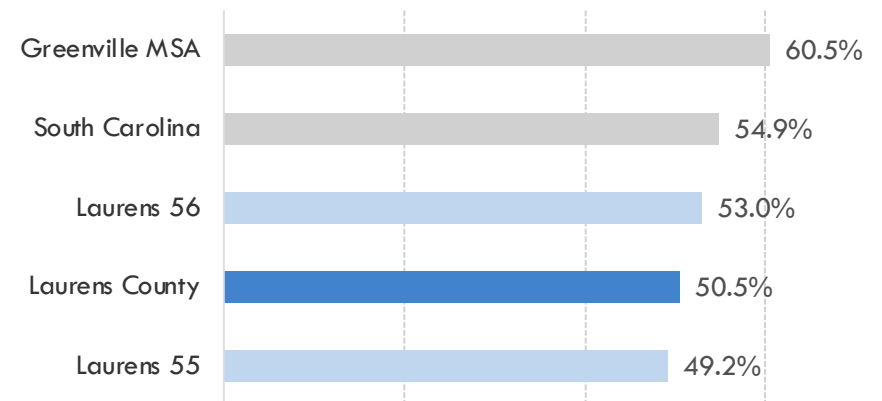
School outcomes are affected by a combination of economic, demographic, and institutional factors. Overall, they provide some measure of relative success and highlight areas that may need improvement.

SHARE OF STUDENTS MEETING OR EXCEEDING EXPECTATIONS ON READING & WRITING ASSESSMENTS, 2019



SOURCE: SC Department of Education / Avalanche Consulting

SHARE OF STUDENTS MEETING OR EXCEEDING EXPECTATIONS ON END-OF-COURSE MATHEMATICS ASSESSMENT, ALGEBRA 1, 2019



SOURCE: SC Department of Education / Avalanche Consulting



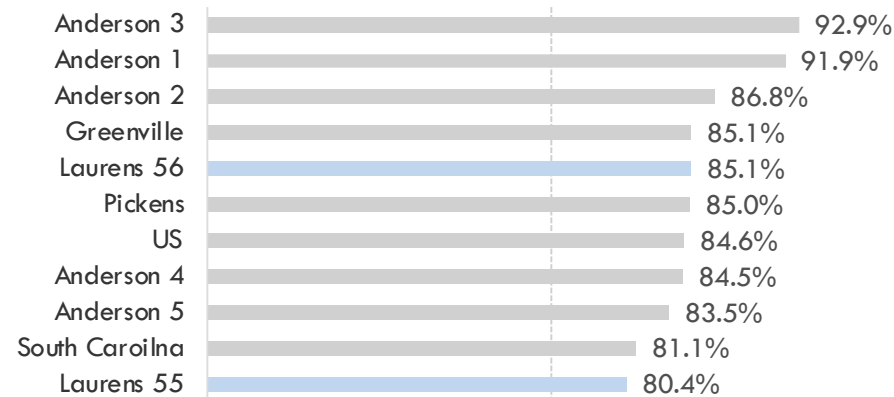
Graduation Rates

Performance in graduation rates and post-secondary enrollment between the two school districts in Laurens County varies. Laurens District 56 performs above average, and Laurens 55 performs slightly below average.

The on-time graduation rates in Laurens 56 are slightly above the national average and on par with Greenville County schools. Laurens 55 trails both the national and state averages.

Nearly 86% of District 56 graduates went on to enroll in a post-secondary institution, which is the second highest rate in the Greenville MSA and well above the state and national averages. At only 58%, District 55 fell at the bottom of the MSA.

GRADUATION RATES, 2018-2019

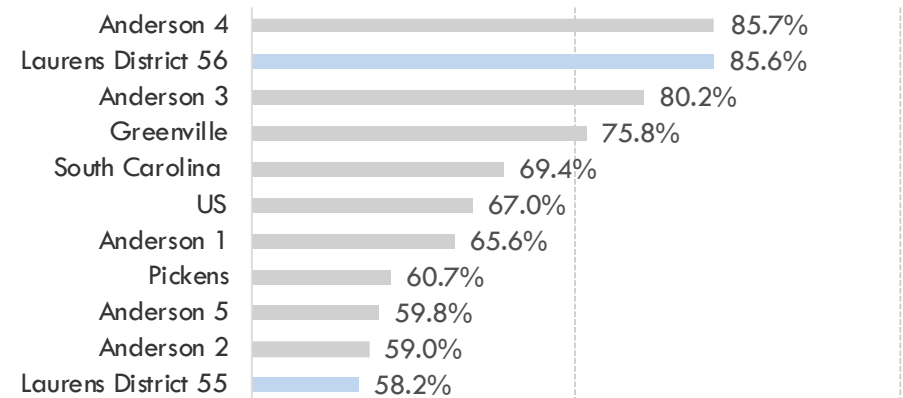


WHY IS THIS IMPORTANT?

Students who graduate from high school and enroll in post-secondary educational institutions are far more likely to enjoy greater economic opportunity than their peers who fail to graduate high school.

School outcomes are affected by a combination of economic, demographic, and institutional factors. Overall, they provide some measure of relative success and highlight areas that may need improvement.

% OF 2017 HIGH SCHOOL GRADUATES ENROLLED IN A POST-SECONDARY INSTITUTION WITHIN 16 MONTHS OF GRADUATION



SOURCE: SC Department of Education / Avalanche Consulting

SOURCE: SC Department of Education / Avalanche Consulting



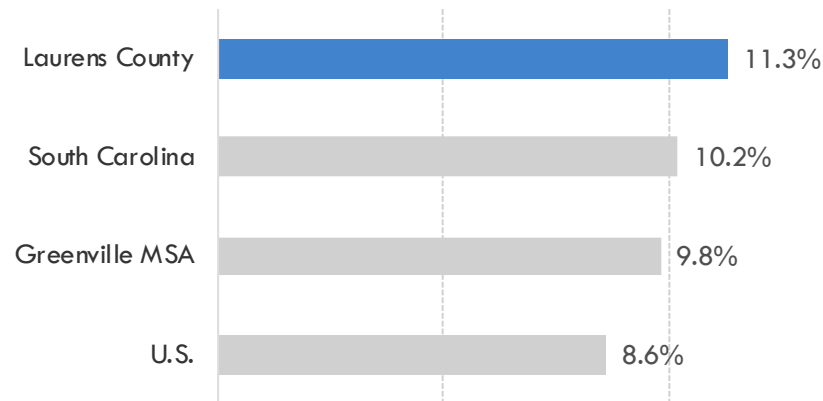
Educational Attainment

The educational attainment dynamics of Laurens County's population reflects the strong presence of manufacturing within the community. At more than 11%, the proportion of Lauren County residents with an associate degree is higher than the national, statewide, and regional averages. Conversely, the proportion of Laurens County residents with a bachelor's degree or higher level of educational attainment is relatively low. In 2018, slightly more than 17% of Laurens County residents possessed a bachelor's degree or higher level of educational attainment, barely half the national figure.

WHY IS THIS IMPORTANT?

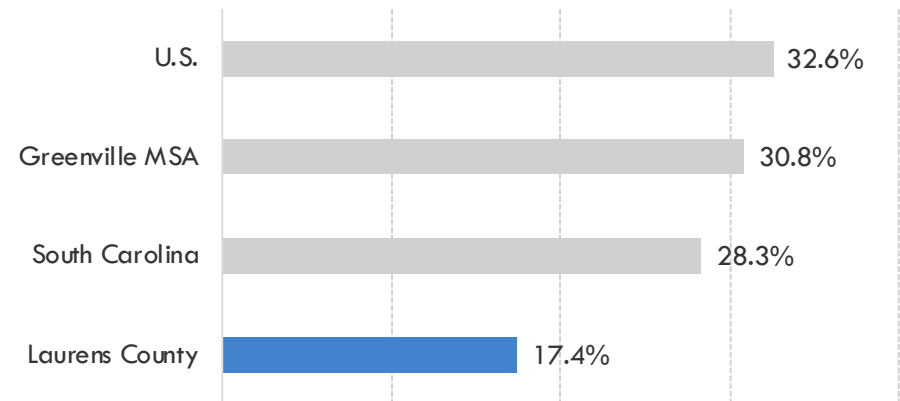
The modern economy is increasingly knowledge-intensive. New jobs often require education beyond a high-school diploma – ranging from a certificate to a master's degree. Due to this growing reliance on skilled workers, many businesses expand in and choose new locations based on the presence of a well-educated population.

SHARE OF 25 YEARS+ POPULATION
W/ AN ASSOCIATE DEGREE, 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

SHARE OF 25 YEARS+ POPULATION
W/ BACHELOR'S DEGREE OR HIGHER, 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

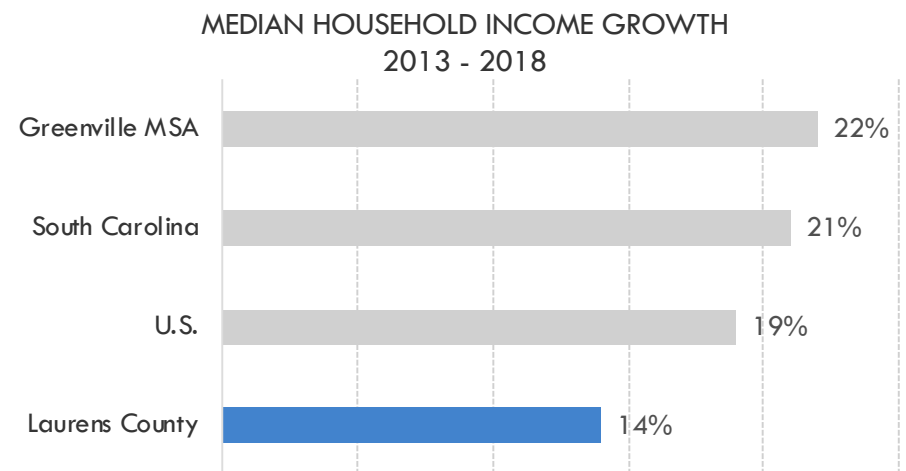
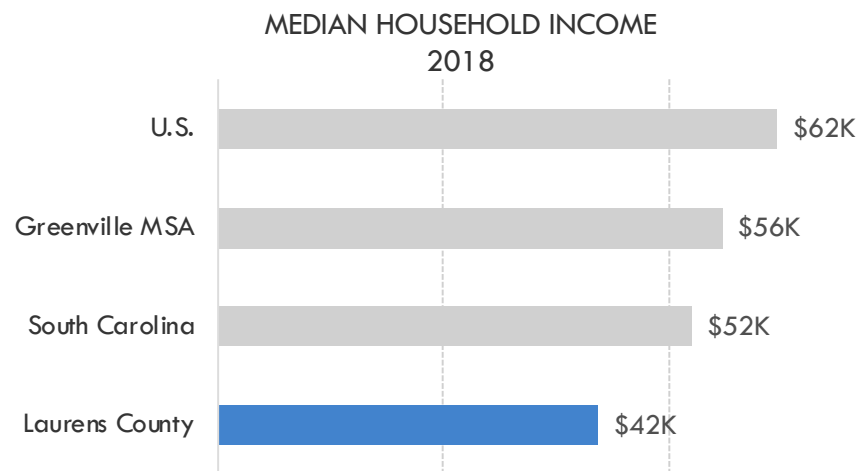
Income

At approximately \$42,000, income levels in Laurens County are relatively low. Median household income in Laurens County is \$10,000 less than the South Carolina figure and nearly \$20,000 less than the U.S. figure.

Though income growth has occurred since 2013 (14% income growth), it has been less than the average growth for the U.S. (19% growth) and considerably lower than the state (21%) and Greenville-Anderson-Mauldin, SC MSA (22%).

WHY IS THIS IMPORTANT?

Wealth creation is an important goal of economic development and a strong measure of a community's economic health. When residents of a community have high household incomes, they are able to reinvest locally by purchasing goods and services that spur additional economic growth.



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS SMALL AREA INCOME & POVERTY ESTIMATES SOURCE: AVALANCHE CONSULTING / U.S. CENSUS SMALL AREA INCOME & POVERTY ESTIMATES



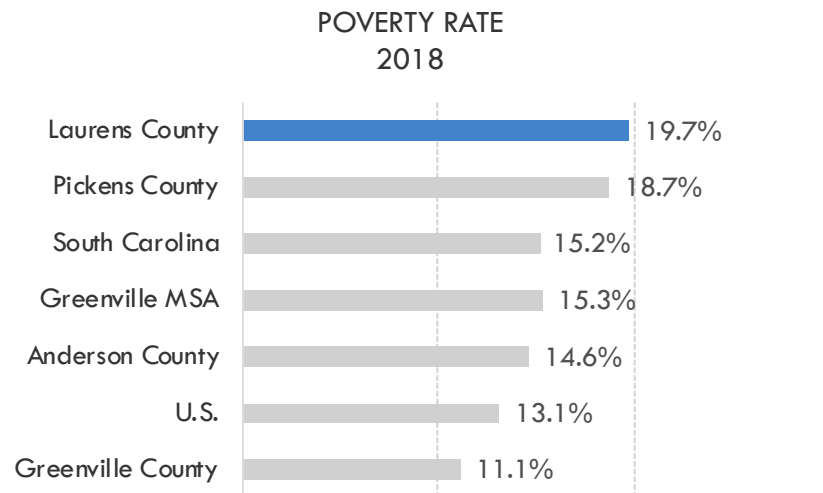
Poverty

Income levels and labor force participation rates in Laurens County are relatively low, contributing to a relatively high poverty rate. At nearly 20%, the poverty rate in Laurens County is higher than the national, state, and MSA averages.

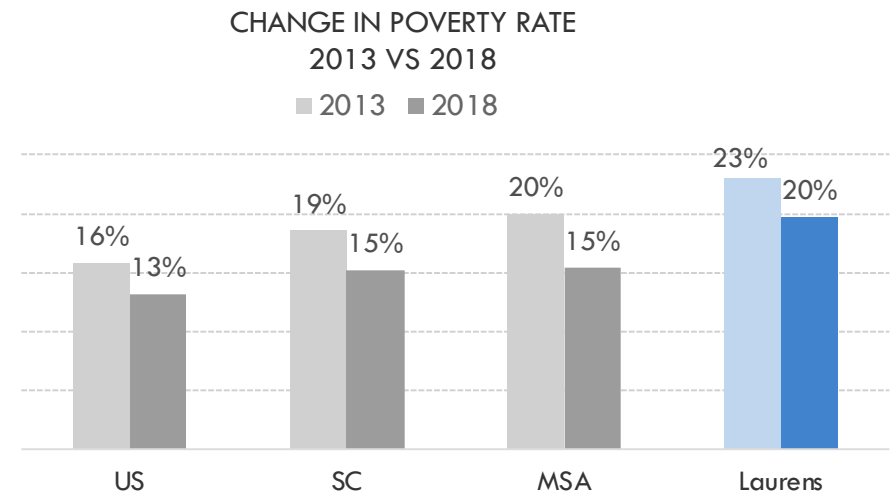
Because of gains in income and employment levels, the percent of Laurens County residents in poverty has improved from 2013-2018. During this same time period, poverty rates in the U.S., South Carolina, and the MSA improved between 3%-5%.

WHY IS THIS IMPORTANT?

Poverty levels indicate whether residents have incomes and access to jobs that allow them to prosper and support their families. High poverty levels often reflect limited job opportunities in a community and put heavy demands on social services.



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS SMALL AREA INCOME & POVERTY ESTIMATES



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS SMALL AREA INCOME & POVERTY ESTIMATES

Crime

Both violent and property crime in Laurens County are well above national, state, and nearby county averages.

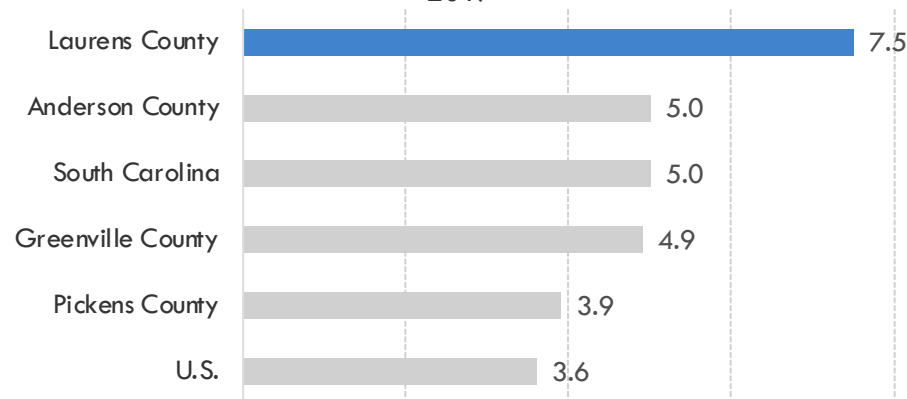
In 2017, there were 7.5 violent crimes per 1,000 residents in Laurens County – greater than South Carolina and the counties of Greenville, Pickens, and Anderson. The frequency of violent crimes in Laurens County was more than twice the national average.

The frequency of property crimes in South Carolina is also higher than the national average. Property crimes in Laurens County are slightly lower than the state average but slightly higher than Greenville County.

WHY IS THIS IMPORTANT?

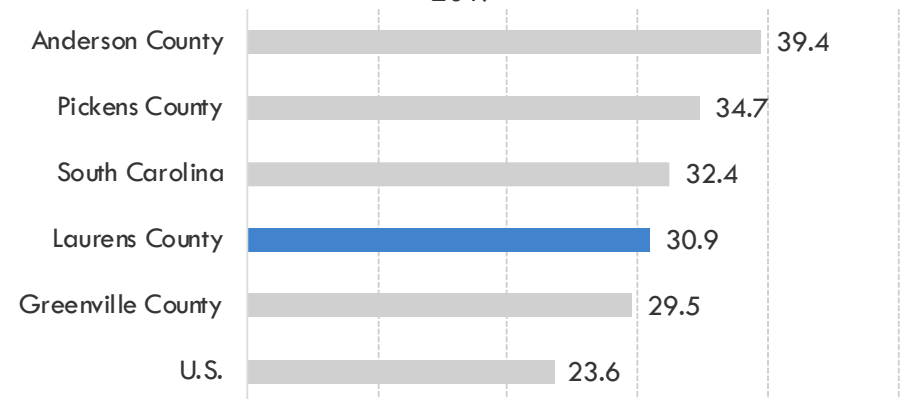
Actual and perceived crime rates play a significant role in location decisions for residents and businesses.

VIOLENT CRIME PER 1,000 RESIDENTS
2017



SOURCE: AVALANCHE CONSULTING / FBI / SC LAW ENFORCEMENT DIVISION

PROPERTY CRIME PER 1,000 RESIDENTS
2017



SOURCE: AVALANCHE CONSULTING / FBI / SC LAW ENFORCEMENT DIVISION

Housing

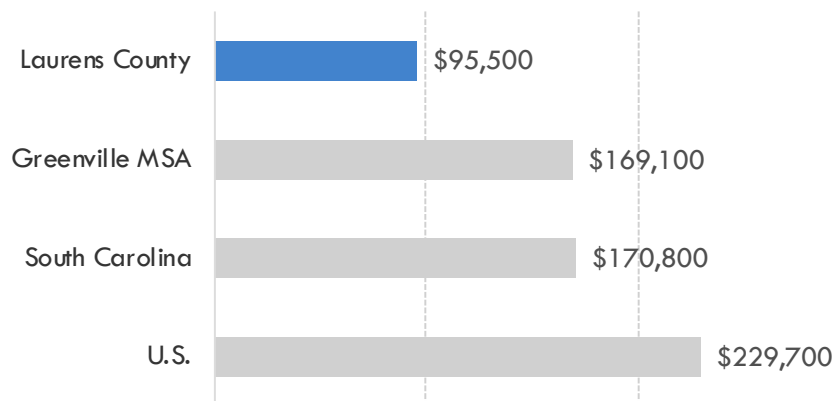
The median price of a house in Laurens County is \$95,500, which is almost half the price of homes in the Greenville MSA and in South Carolina.

In Laurens County, the small growth in new housing units is reflective of the relatively small gains in population. Only 2.9% of housing units were constructed since 2010, compared to nearly 10% in the Greenville MSA and South Carolina and 6% in the U.S. Forty-three percent of the housing stock in Laurens County was built in the 1980s and 1990s.

WHY IS THIS IMPORTANT?

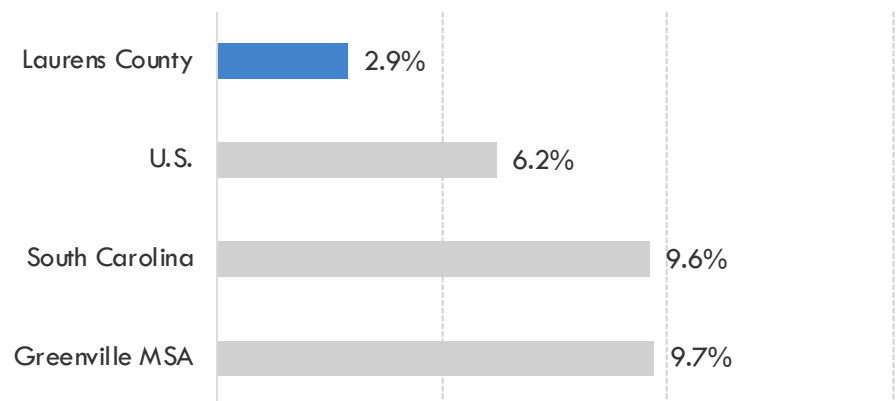
Availability and affordability of housing directly affect the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgage or rent). Many communities across the country face housing challenges – total shortages, cost concerns, housing type imbalances, and more. Housing has become a major quality of life issue, and limited housing options can create socioeconomic imbalances in a community and put constraints on growth.

MEDIAN HOUSING VALUE
2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

% OF UNITS CONSTRUCTED FROM 2010 - 2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

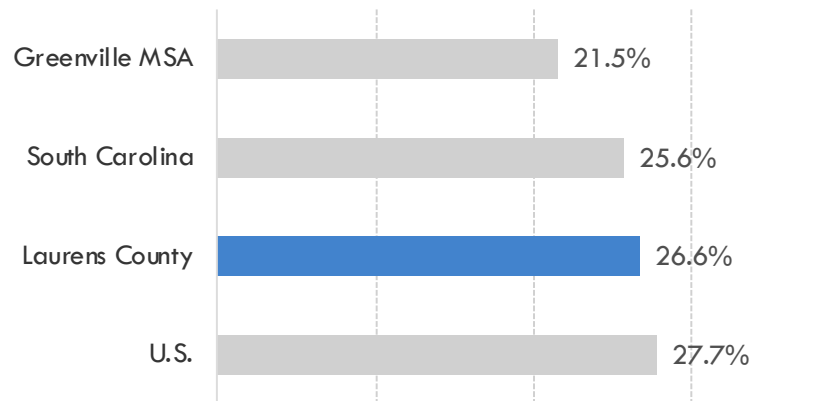
Housing

Both homeowners with a mortgage and renters in Laurens County are less likely to be cost-burdened compared to the national average. Approximately 27% of homeowners with mortgages in Laurens County spend 30% or more of their income on housing cost, a higher proportion than in the Greenville metro or South Carolina as a whole, but less than the national average. Approximately 45% of renters in Laurens County spend 30% or more of their income on housing costs, a smaller share than the broader Greenville region, South Carolina, and U.S. averages.

WHY IS THIS IMPORTANT?

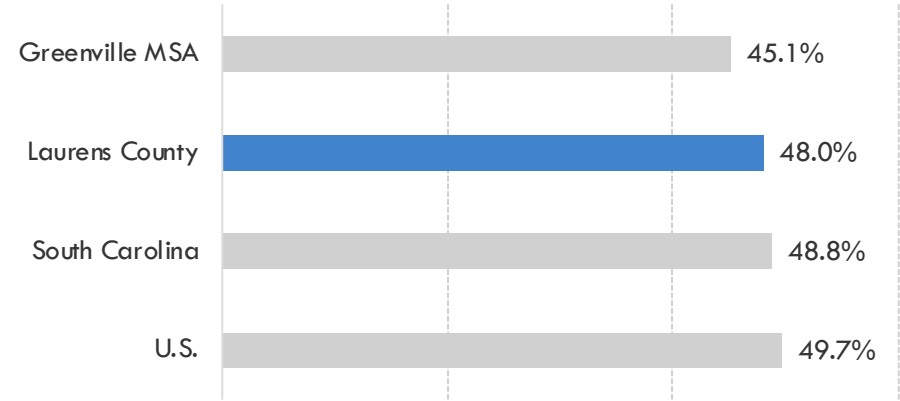
Availability and affordability of housing directly affect the lives of residents in a community and the ability of businesses to retain and attract workers. Housing is considered unaffordable if owners and renters are spending more than 30% of their income on housing costs (mortgage or rent). Many communities across the country face housing challenges – total shortages, cost concerns, housing type imbalances, and more. Housing has become a major quality of life issue, and limited housing options can create socioeconomic imbalances in a community and put constraints on growth.

COST-BURDENED HOMEOWNERS WITH A MORTGAGE
2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

COST-BURDENED RENTERS
2018



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU



Internet Access

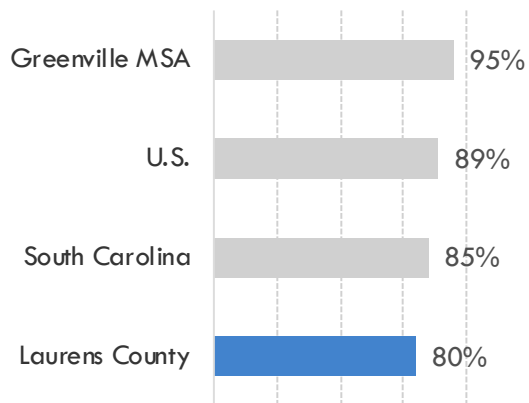
High speed internet access in speeds up to 250 MBPS is not readily available to households in Laurens County. In 2018, only 1% of Laurens County residents had access to 250 MBPS internet or faster, compared to 15% of the Greenville MSA, 37% of South Carolina, and 73% of the U.S.

In 2018, 23% of households in Laurens County lacked access to the internet, and 17% listed their cellular data plan as the only form of access. The overall access to internet in Laurens County lags the MSA, state, and national averages.

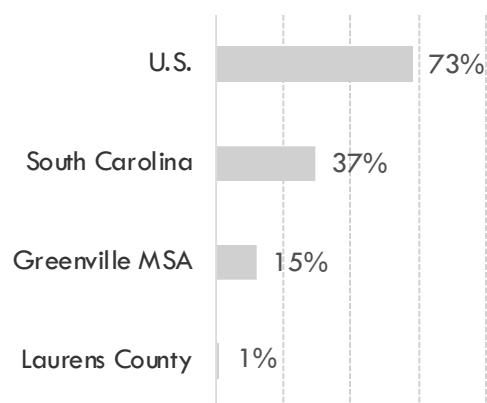
WHY IS THIS IMPORTANT?

The absence of fast and reliable broadband access can affect high tech job creation, entrepreneurship, and telecommuting ability. Information technology and professional services businesses often look for locations that allow access to high-speed internet for securely transferring files and testing products. Broadband access is important for local entrepreneurs as well and can be considered a measure of quality of life for many residents. As more services – from education to health care – move online, strong internet access will be imperative to maintaining living standards.

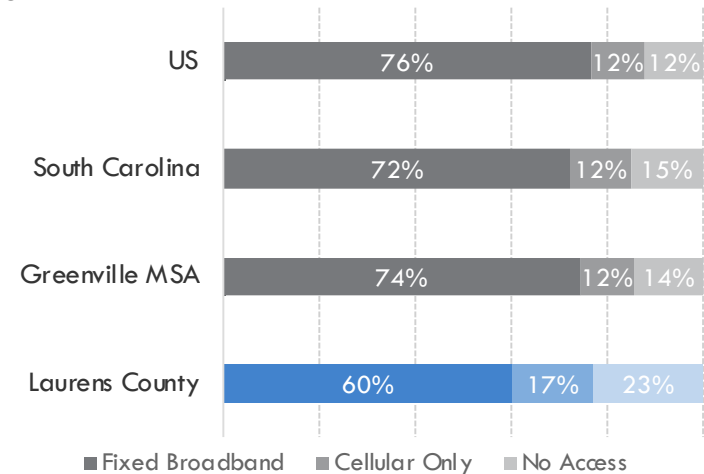
PERCENTAGE OF RESIDENTS WITH 100 MBPS INTERNET ACCESS, 2018



PERCENTAGE OF RESIDENTS WITH 250 MBPS INTERNET ACCESS, 2018



HOUSEHOLD INTERNET ACCESS BY TYPE, 2018



■ Fixed Broadband ■ Cellular Only ■ No Access

Fewer than 1% of households access through dial-up only.

SOURCE: Avalanche Consulting / Federal Communication Commission / U.S. CENSUS BUREAU
Includes ADSL, Cable, Fiber, and Fixed Wireless.



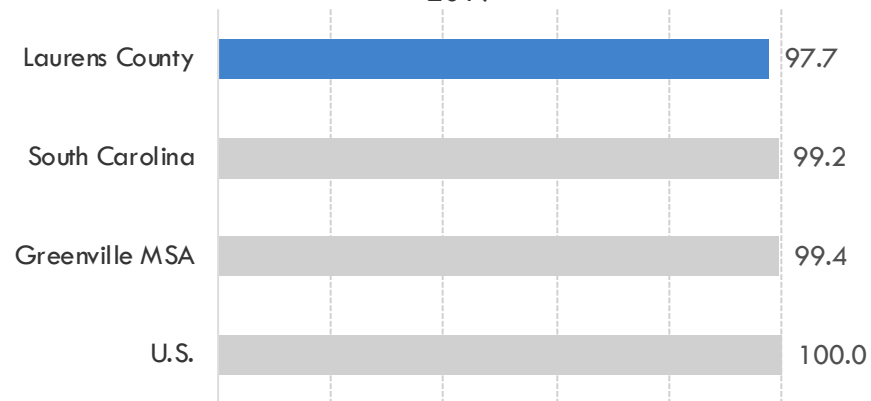
Cost of Living

The cost of living in Laurens County is less than the national, statewide, and regional averages. According to estimates from EMSI, the average cost of living in Laurens County is about 2% less than the national average. Data on home costs relative to incomes, however, suggest that Laurens County is even more affordable. Median home prices in the community are just 2.3 greater than median income levels. Nationally, median home prices are 3.7 greater than median income levels.

WHY IS THIS IMPORTANT?

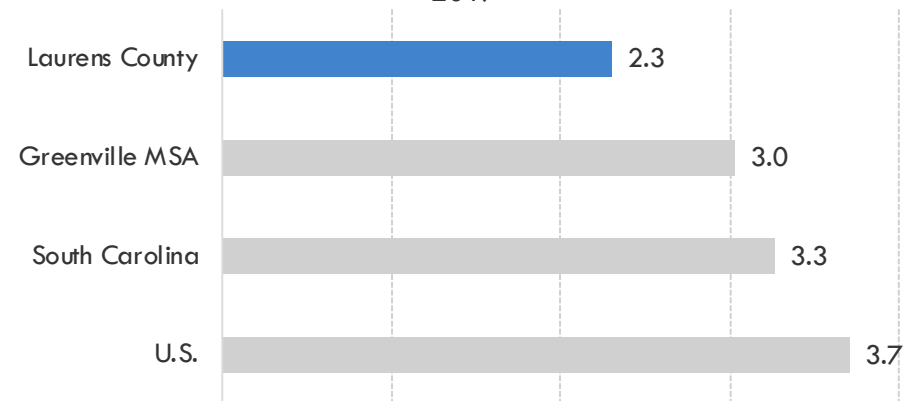
Cost of living is an important component of quality of place. Regions with high costs of living may find it difficult to attract and retain talent. A higher cost of living disproportionately affects lower income families and may create socioeconomic imbalances and hiring challenges for many “working” occupations – including teachers, nurses, hospitality workers, and more.

COST OF LIVING INDEX
2019



SOURCE: AVALANCHE CONSULTING / EMSI

RATIO OF MEDIAN HOME VALUE TO MEDIAN HOUSEHOLD INCOME
2017



SOURCE: AVALANCHE CONSULTING / U.S. CENSUS BUREAU

Taxes

In 2020, the State of South Carolina ranked #30 in terms of overall business tax climate by the Tax Foundation. The state offers a competitive tax environment for corporate income tax (#4 rank) but is less competitive relative to sales tax (#29), unemployment tax (#26), and property tax (#30).

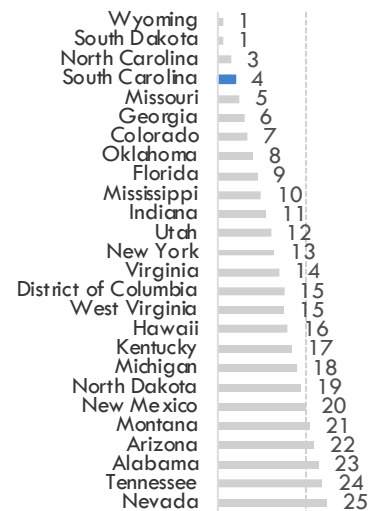
The State of South Carolina and Laurens County offers incentives related to income, inventory, and property that can reduce the tax liability of companies investing in the State. Overall, the State of South Carolina is looked upon as a favorable state for doing business.

WHY IS THIS IMPORTANT?

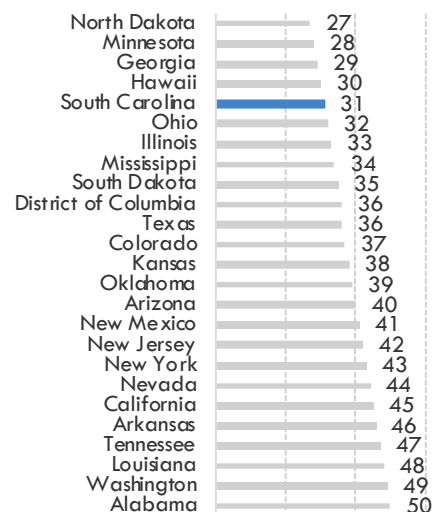
Corporate income tax rates can affect the profits of businesses and desirability of a location, depending on the industry. For example, financial businesses may see a significant benefit to locating in a state with no corporate income tax.

STATE BUSINESS TAX CLIMATE INDEX – 2020

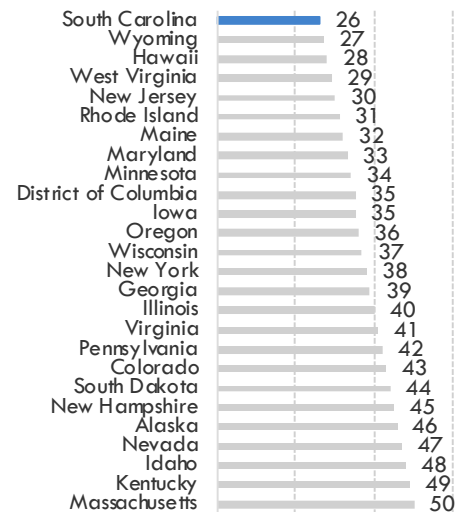
CORPORATE INCOME TAX RANK



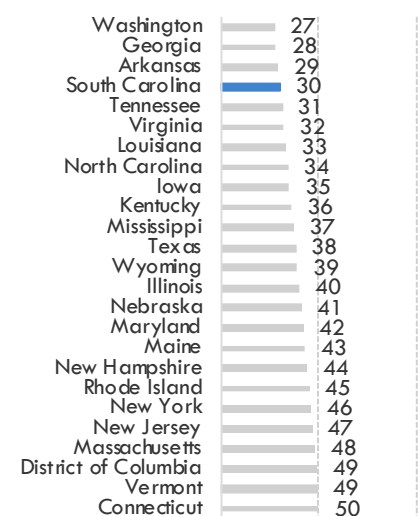
SALES TAX RANK



UNEMPLOYMENT TAX RANK



PROPERTY TAX RANK



SOURCE: AVALANCHE CONSULTING / TAX FOUNDATION



Electricity Rates

Electricity users in Laurens County have access to rates that are relatively competitive with those of other states in the southeastern U.S.

In August 2019, the average cost of electricity for commercial users in South Carolina was 10.2¢ per kWh – below the national average of 11.0¢ per kWh, but higher than rates in North Carolina, Florida, and Georgia.

For industrial users, the South Carolina average cost of electricity was 6.1¢ per kWh – less than the U.S. average of 7.4¢ per kWh. At 5.8¢ per kWh, only Tennessee has a lower electricity rate for industrial users in the southeast.

WHY IS THIS IMPORTANT?

Utility availability and pricing directly affect the cost of operations for many businesses. Large-scale manufacturers, data centers, and other major water- and energy-consuming industries will often make location and expansion decisions primarily on utility considerations.

AVERAGE PRICE OF ELECTRICITY FOR COMMERCIAL USERS PER KWH, AUGUST 2019



SOURCE: AVALANCHE CONSULTING / U.S. ENERGY INFORMATION ADMINISTRATION

AVERAGE PRICE OF ELECTRICITY FOR INDUSTRIAL USERS PER KWH, AUGUST 2019



SOURCE: AVALANCHE CONSULTING / U.S. ENERGY INFORMATION ADMINISTRATION

Appendix 2

Target Cluster Evaluation

About this Section

Companies in the same industry often benefit from locating in close geographic proximity. This geographic clustering can increase productivity through shared access to clients and suppliers across multiple industries. Clustering also allows for access to a larger trained workforce and sharing of research and knowledge. These benefits make clustering a smart strategy for businesses, increasing efficiencies and saving money and time.

Targeting specific industry clusters allows a community to focus its economic development resources on those that achieve local goals and generate the highest return on investment. Because economic development organizations have limited funding and staff, they must prioritize activities. Targeting focuses economic development activities on expanding industry clusters in which the community is most competitive. From a community perspective, a targeted cluster strategy allows for strategic alignment in designing education curriculum and workforce development training, organizing public policy and advocacy efforts, and planning and prioritizing investments in infrastructure.

Targeting specific industries over others does not imply that non-targeted industries will remain stagnant. Instead, targeting increases overall economic growth and regional wealth, and all local businesses benefit from this increased economic activity and job creation.

This section, *Appendix 2: Target Cluster Evaluation*, provides the analysis behind the target clusters recommended in Section 4 of this report. These targets will become the focus of economic development activities in Laurens County. Understanding cluster needs will help leaders in Laurens County focus resources on coordinated investments that encourage target industry growth.

This section includes:

Target Selection Methodology: This section outlines the methodology used to select target clusters for Laurens County. The process of reviewing stakeholder input, national and global industry trends, and a cluster analysis combines to form a recommended list of targets to be the focus of economic development efforts for the next five years.

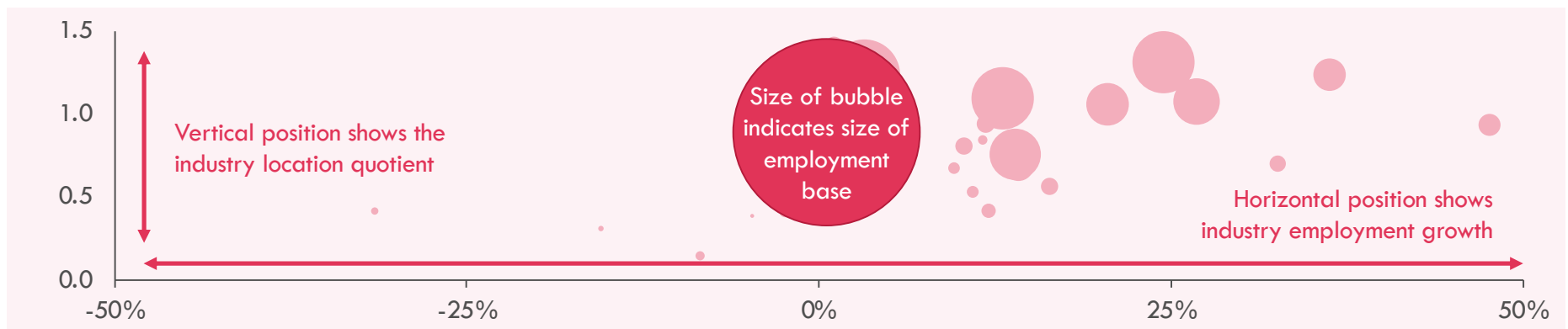
Current Target Performance Evaluation: Part of the target industry selection process includes a quantitative examination of Laurens County's current targets. This section summarizes the findings of this analysis, which examined industry and occupational cluster size, relative concentration, and past growth to identify existing and emerging drivers of job creation within the community.

Methodology

The cluster performance evaluation begins with an analysis of Laurens County's industry cluster trends in recent years. Examining the performance of industry clusters provides insight into the community's strengths and opportunities. This analysis looked at location quotients (LQs), industry cluster employment, new job creation, and growth rates for 30 industry clusters in Laurens County. Fast-growing clusters, for example, often reflect immediate opportunities for recruitment and expansion efforts. Clusters that are more concentrated in the region relative to the U.S. average may reflect regional advantages such as skilled workforce or geographic advantage that can be leveraged for future economic development efforts.

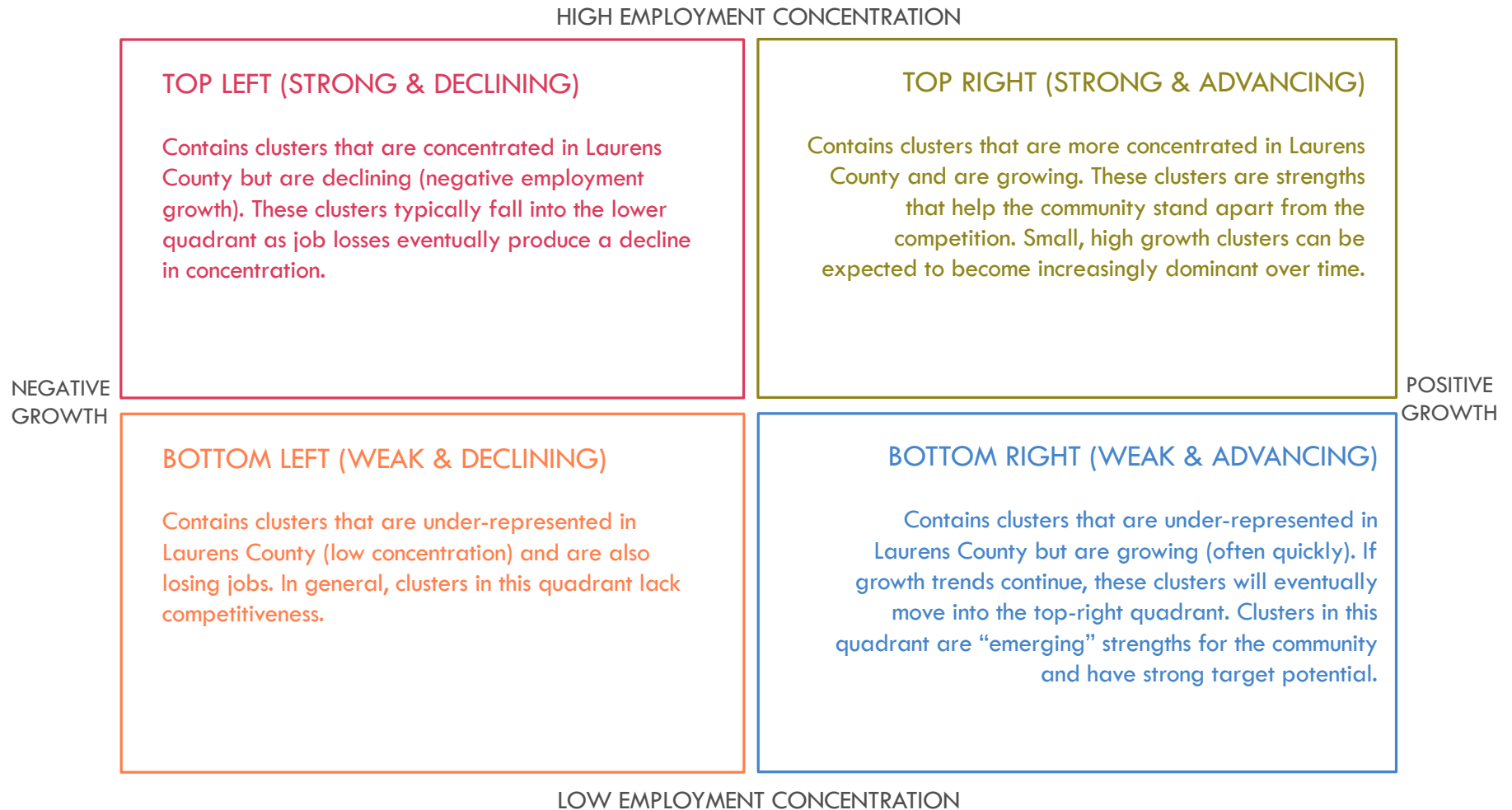
The bubble charts on the following pages should be interpreted as follows:

- **Horizontal Axis:** Employment growth rate for the past five years.
- **Vertical Axis:** The Location Quotient (LQ). LQs calculate the relative per capita concentration of industry jobs in a community compared to the U.S. average. An LQ of 1.0 indicates the same concentration as the U.S. average. An LQ above 1.0 is more concentrated than the U.S. average, indicating that the cluster has more jobs per capita locally than seen across the U.S.
- **Size of Bubble:** Total employment in each cluster.



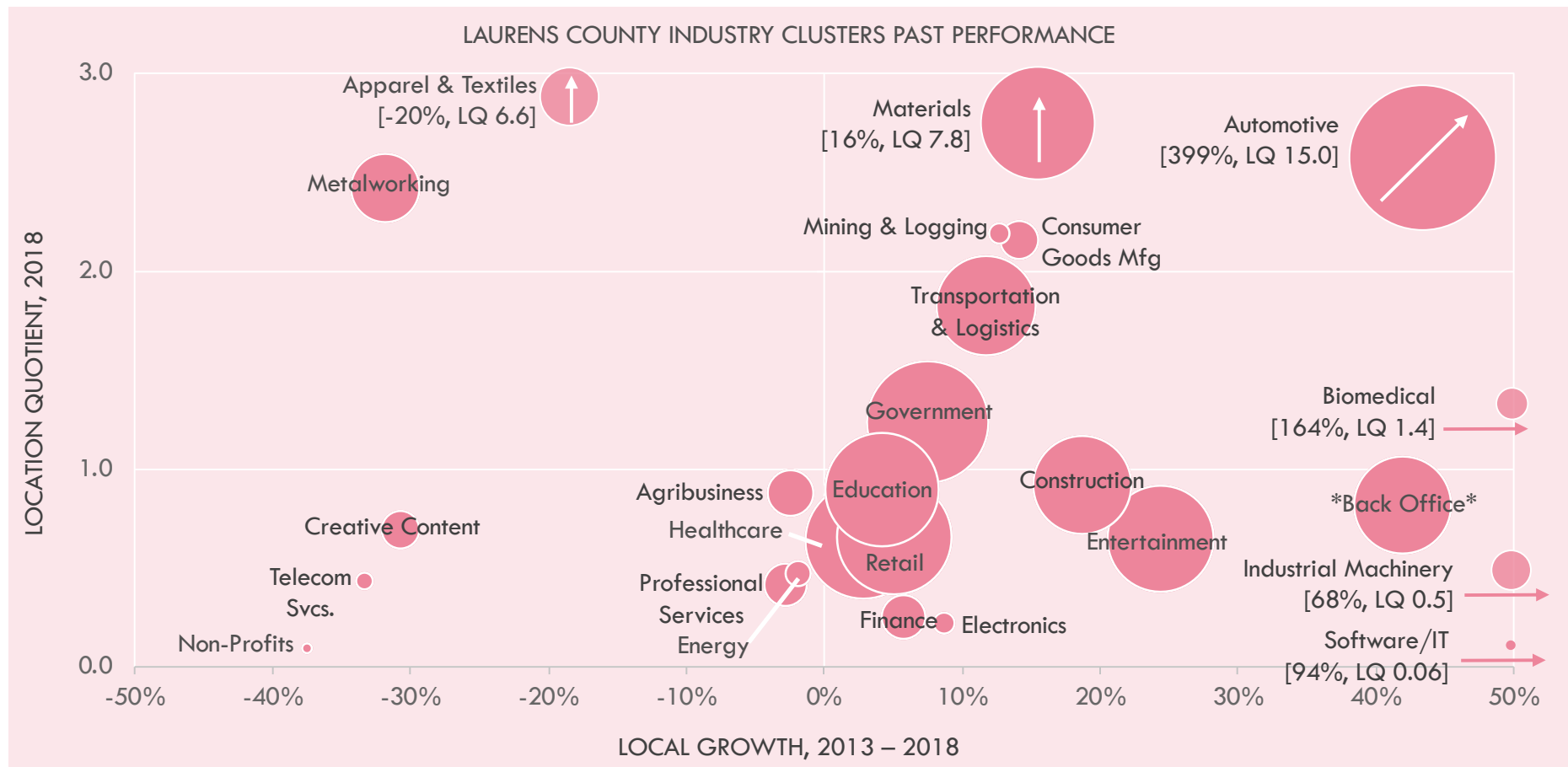
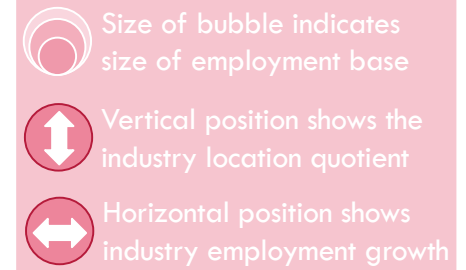
Methodology

Each of the chart's four quadrants tell a story:



Cluster Performance Review

Between 2013 and 2018, total employment in Laurens County increased nearly 21%, with growth felt across most industries. Automotive was the by far the strongest performer with nearly 400% growth. The medium-sized clusters of Materials and Transportation & Logistics grew also, but at a slower rate than the overall average. Conversely, both Apparel & Textiles and Metalworking experienced a decline. From a percentage basis, several smaller industries posted especially strong employment growth during this period, including Biomedical (164% growth), Software/IT (94%), and Industrial Machinery (68%).



* The numbers for Back Office include temporary employees from various other industries.

As of 2018, the Logistics and Manufacturing industries made up nearly 50% of temporary employment on the national level.

SOURCE: AVALANCHE CONSULTING / EMSI



Cluster Performance Review

Overall, Manufacturing makes up 36% of employment in Laurens County and has grown 44% over the last five years. This includes job growth in the clusters of **Automotive** (+2,500 new jobs), **Materials** (+300), **Biomedical** (+113), **Industrial Machinery** (+104), and **Consumer Goods** (+28). **Transportation & Logistics** is the next largest primary industry, totaling 1,400 jobs and growing 16% since 2013.

Automotive is Laurens County's largest and highest performing cluster. Its employment in Laurens County is nearly 15 times more concentrated (15 LQ) than the U.S. average. Automotive employs more than 3,200* people and has grown at an astonishing rate of 400% over the last five years.

Other notable manufacturing-based clusters in Laurens County include Materials, Apparel & Textiles, Consumer Goods Manufacturing, Agribusiness & Food, and Industrial Machinery.

Employment in **Materials (7.8 LQ)** and **Apparel & Textiles (6.6 LQ)** are heavily concentrated in Laurens County. Materials added 300 jobs over the last five years and Apparel & Textiles lost 130 jobs, most likely a result of automation.

Employment in Consumer Goods is twice as concentrated in Laurens County (2.2 LQ) and grew 14%. While **Agribusiness & Food** experienced an 8% decline in employment, its sub-cluster **Packaged Food Manufacturing** grew 15% and is expected to increase as Muffin Mam ramps up production.

Software/IT and **Industrial Machinery** are both smaller industries that are less concentrated in Laurens County, but have grown significantly over the last five years.

INDUSTRY CLUSTER	LAURENS COUNTY			% JOB GROWTH '13-'18	
	JOBS 2018	JOB GROWTH '13-'18	LQ 2018	LAURENS COUNTY	US
Aerospace	-	-	0.00	-	1.2%
Agribusiness & Food	320	-8	0.88	-2.4%	11.4%
Apparel & Textiles	530	-130	6.62	-19.7%	-4.4%
Automotive	3,181	2,544	14.96	399.4%	16.8%
Back Office*	1,374	406	0.82	41.9%	11.7%
Biomedical	182	113	1.40	163.8%	9.8%
Construction	1,402	221	0.92	18.7%	20.8%
Consumer Goods Mftg	226	28	2.16	14.1%	3.4%
Creative Content	221	-98	0.69	-30.7%	-2.1%
Education	1,863	75	0.90	4.2%	4.9%
Electronics	75	6	0.22	8.7%	-11.6%
Energy	104	-2	0.47	-1.9%	-7.7%
Entertainment	1,637	321	0.65	24.4%	14.1%
Finance	294	16	0.25	5.8%	7.3%
Furniture	4	-4	0.05	-50.0%	11.2%
Government	2,134	149	1.24	7.5%	2.8%
Healthcare	1,950	54	0.64	2.8%	11.9%
Industrial Machinery	258	104	0.53	67.5%	3.6%
Materials	2,230	303	7.75	15.7%	6.3%
Metalworking	694	-324	2.42	-31.8%	1.2%
Mining & Logging	71	8	2.19	12.7%	3.4%
Non-Profits	20	-12	0.09	-37.5%	4.1%
Professional Services	278	-8	0.41	-2.8%	8.1%
Research	4	-106	0.01	-96.4%	19.2%
Retail	1,901	92	0.66	5.1%	5.7%
Software / Info. Tech.	31	15	0.06	93.8%	29.0%
Telecom Services	50	-25	0.43	-33.3%	-11.8%
Transportation & Logistics	1,437	151	1.83	11.7%	22.7%
TOTAL	22,462	3,876	1.00	20.9%	9.1%

SOURCE: EMSI / AVALANCHE CONSULTING

* Back Office includes temporary employees from various other industries/ As of 2018, the Logistics and Manufacturing industries made up nearly 50% of temporary employment on the national level. This results in an overestimate in Back Office and an underestimate in manufacturing and logistics-related clusters.



Occupational Cluster Review

Industries consist of employees with a variety of occupational skills. The Manufacturing industry, for example, is comprised on average by 50% Production occupations. Additional occupations making up the Manufacturing industry include Back Office, Logistics, Engineering, and Mechanics-related occupations.

It should come as no surprise that Production is the largest occupational cluster in Laurens County, given Manufacturing's strong presence in the community. **More than 6,200 Production workers are employed in Laurens County, a number which increased by nearly 2,700 jobs in the last five years.**

The next largest occupational clusters are Logistics (2,900 jobs), Hospitality (2,100), and Back Office (2,100 jobs). Of these clusters, **Logistics is the most concentrated (1.4 LQ) and has grown the fastest (24% employment growth).**

Engineering employment grew 58%, Production grew 44%, Computer grew 31%, and Mechanics 26%. All of which are needed to support Laurens County's growing manufacturing base.

Plant Operators is the most concentrated occupational cluster behind Production occupations. The cluster has grown 23% over the last five years, however, it makes up less than 100 jobs in the county.

OCCUPATIONAL CLUSTER	LAURENS COUNTY			% JOB GROWTH '13-'18	
	JOBS 2018	JOB GROWTH '13-'18	LQ 2018	LAURENS COUNTY	US
Agriculture	65	11	0.36	20.4%	6.2%
Architecture	16	0	0.57	0.0%	17.8%
Back Office	2,071	62	0.63	3.1%	3.1%
Business	477	47	0.61	10.9%	17.6%
Communications	49	3	0.48	6.5%	8.6%
Computer	305	72	0.38	30.9%	16.1%
Construction	627	126	0.68	25.1%	19.9%
Design	121	3	0.81	2.5%	16.0%
Education	1,237	42	0.90	3.5%	5.7%
Engineering	661	243	1.40	58.1%	8.8%
Financial	304	-1	0.45	-0.3%	10.4%
Geology	28	0	0.81	0.0%	-16.4%
Hospitality	2,103	270	0.70	14.7%	10.1%
Legal	86	6	0.49	7.5%	8.6%
Logistics	2,913	565	1.39	24.1%	13.6%
Math	12	0	0.43	0.0%	32.8%
Mechanics	1,092	223	1.25	25.7%	9.6%
Medical	1,593	20	0.77	1.3%	9.4%
Performance	70	5	0.80	7.7%	6.4%
Personal Services	1,651	111	0.63	7.2%	8.7%
Plant Operators	95	18	1.55	23.4%	3.4%
Political	12	0	0.57	0.0%	12.7%
Production	6,226	1,890	4.49	43.6%	5.0%
Sales & Marketing	55	-1	0.36	-1.8%	4.0%
Social Service	936	82	0.86	9.6%	7.9%
TOTAL	22,462	3,876	1.00	20.9%	9.1%

SOURCE: EMSI / AVALANCHE CONSULTING



Appendix 3

Survey Results

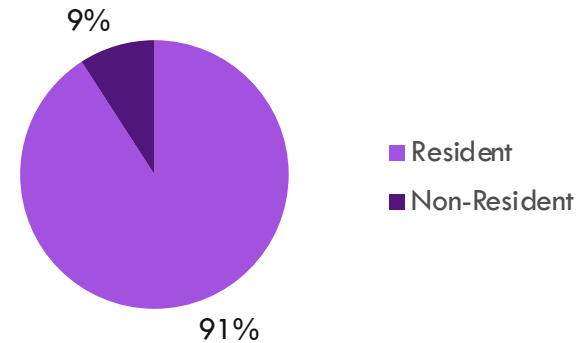
Survey Respondents Profile

WHERE RESPONDENTS LIVE

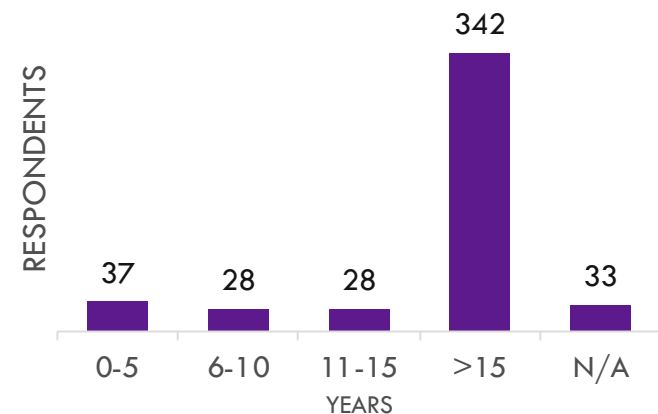
A community survey was distributed to develop a better understanding of Laurens County and the Laurens County Development Corporation (LCDC) from the perspective of its residents and workers. **The survey received 476 responses from October 21 to December 2** and had a 76% completion rate. The average time spent on the survey was nine minutes.

- The vast majority of responses came from residents (91%), and the non-residents who responded primarily lived in Simpsonville, Greenville County, or Greenwood County.
- The majority of residents of Laurens County who responded have lived in the community for more than 15 years. Seventy-three % of respondents have lived in Laurens County for more than 15 years while every other category only accounted for 6% – 8% of respondents.

WHERE DO SURVEY RESPONDENTS LIVE?



LENGTH OF TIME IN LAURENS COUNTY



Survey Respondents Profile

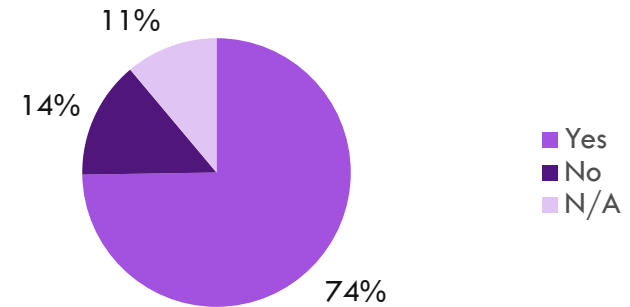
WHERE RESPONDENTS WORK

Three-quarters of survey respondents work in Laurens County, while the remaining respondents either do not work in the County or do not work. Greenville County/Greenville was the most common response from those choosing to disclose the location of their workplace, followed by Greenwood and retired. Most survey respondents are both long-time residents and long-time workers based in Laurens County.

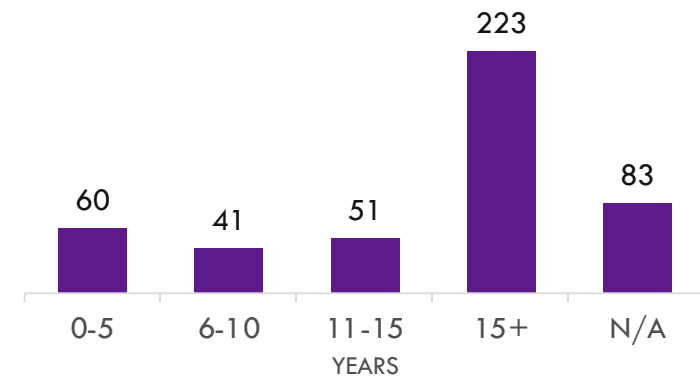
- Survey respondents reported working primarily in the following industries:
 - Education services (163)
 - Other (72)
 - Government/Public Services (38)
 - Health Care Services (34)
 - Automotive (12)
 - Utilities (12)
- The most common responses to “Other” included:
 - Non-profit
 - Religious
 - Service/Retail
 - Retired
 - Manufacturing
 - Professional Services

These results point to an older workforce population who have been working in the County for over a decade. Growth in the emerging workforce appears slow.

DO SURVEY RESPONDERS WORK IN LAURENS COUNTY?



LENGTH OF TIME WORKING IN LAURENS COUNTY

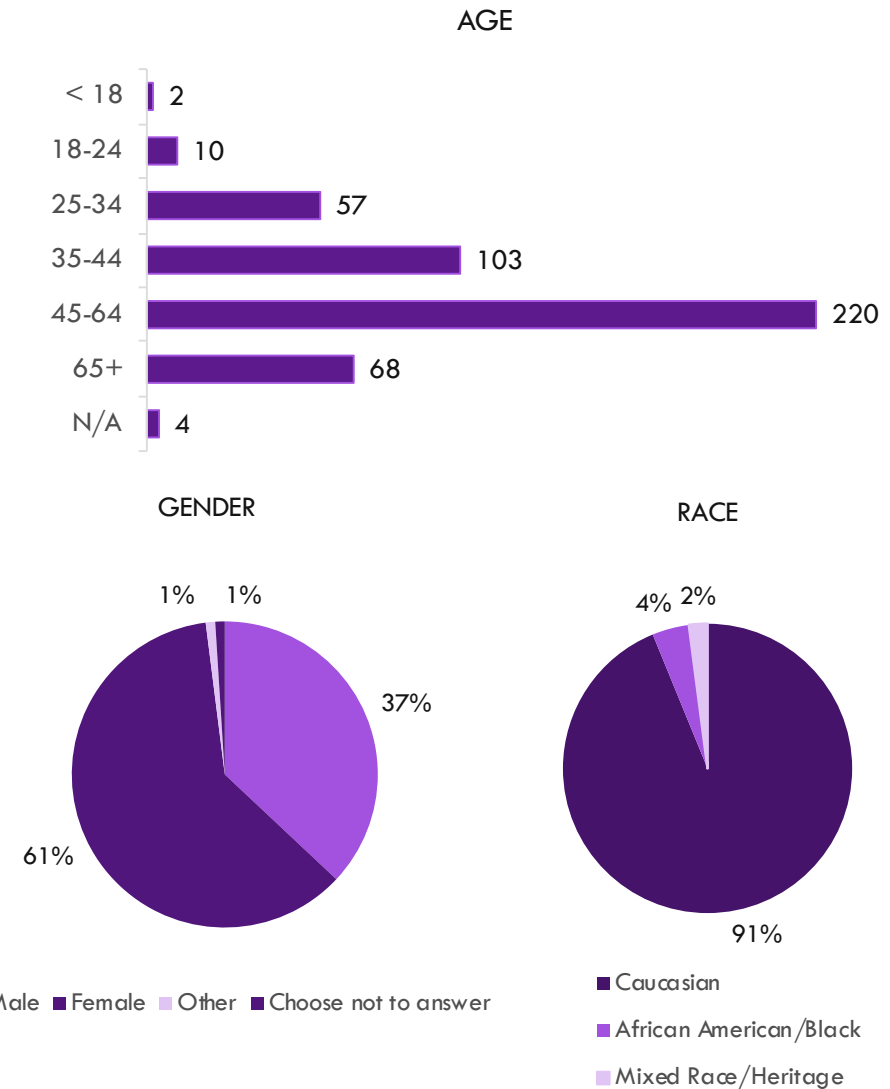


Survey Respondents Profile

The following provides a snapshot of the characteristics of survey participants.

- Almost half of survey respondents were between the ages of 45-64. The 45-64 age range only accounts for 26% of the population.
- Women had a greater representation on the survey than men (61% versus 37%).
- The breakdown by race showed that 91% of participants classified themselves as Caucasian. For reference, 68% of all Laurens County residents are Caucasian. The next largest group of participants (4%) considered themselves to be African American/Black, even though 23% of Laurens County residents are African American/Black. Two % of respondents identified as mixed race/heritage. Only one survey respondent identified as Hispanic/Latino and one respondent identified as Asian, making them less than 1% and not visible on the chart to the right.

CHARACTERISTICS OF SURVEY RESPONDENTS



Overall Perceptions

Laurens County received very average ratings from survey respondents on its desirability as a place to live and a place to work. It received a slightly higher rating for livability, 3.4 out of 5 stars versus 3.2 out of five stars as a place to work.

An almost equal amount of respondents rated Laurens County an “average” place to live as a “good” place to live (146 responses vs. 148 responses). 31 respondents rated Laurens County as an “excellent” place to live while 48 rated it a “poor” place to live.

Results skewed more average for Laurens County as a place to work. One hundred thirty-six respondents rated Laurens County an “average” place to work while 125 called it “good.” Twice as many respondents called Laurens County a “poor” place to work than an “excellent” one (63 responses vs. 30 responses).

LAURENS COUNTY AS A PLACE TO LIVE



3.4 OUT OF 5 STARS

LAURENS COUNTY AS A PLACE TO WORK



3.2 OUT OF 5 STARS

Perceptions of Economic Performance

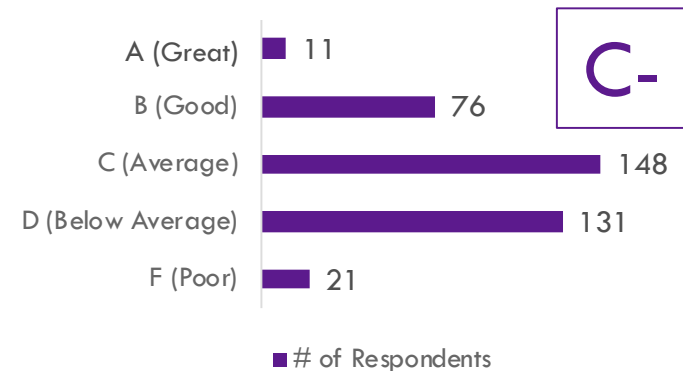
Survey respondents have an average view of the county's economic performance. Most respondents rated Laurens County's economic performance as "average" (38%), closely followed by "below average" (34%). In summary, Laurens County's economic performance grade is about a C-.

Perceptions of specific factors of Laurens County's economic performance are generally not favorable. In 8 out of 12 categories regarding the County's economic performance, most respondents gave the rating "below average." In the other three categories, the highest response was "average."

Despite growth in jobs and capital investment over the past several years, these ratings show that respondents are still generally unsatisfied with the Laurens County economy. Important markers of economic strength, like salary levels or image as a business destination, received overwhelmingly high levels of "below average" and "poor" ratings.

The categories that received the best responses from survey respondents were equal opportunity, state leadership, economic development vision, and local & regional leadership, but even then, the responses were "average."

LAURENS COUNTY OVERALL ECONOMIC PERFORMANCE



PERCEPTION OF ECONOMIC FACTORS (IN DESCENDING ORDER)



Perceptions of Business Climate

Respondents gave Laurens County's business climate an "average" rating in every category.

Ability to expand a business, ease of starting a business, entrepreneurial and small business support, and available incentives received some of the highest ratings of "below average." This suggests a negative perception of small or local business support compared to large businesses.

The business climate rankings received almost ten times as many "not applicable/not sure" responses compared to other rankings. This might suggest a lack of knowledge among the public about what economic development resources are available and Laurens County's competitiveness in the region and state.

The business climate factors receiving the most "above average" and "excellent" rankings were in the categories of available industrial real estate, available commercial real estate, and cost of doing business. While residents and workers may not be aware of specific economic resources, particularly for small businesses, they do understand that Laurens County has land ready to be developed, and that South Carolina keeps business costs low.

PERCEPTION OF BUSINESS CLIMATE (IN DESCENDING ORDER)



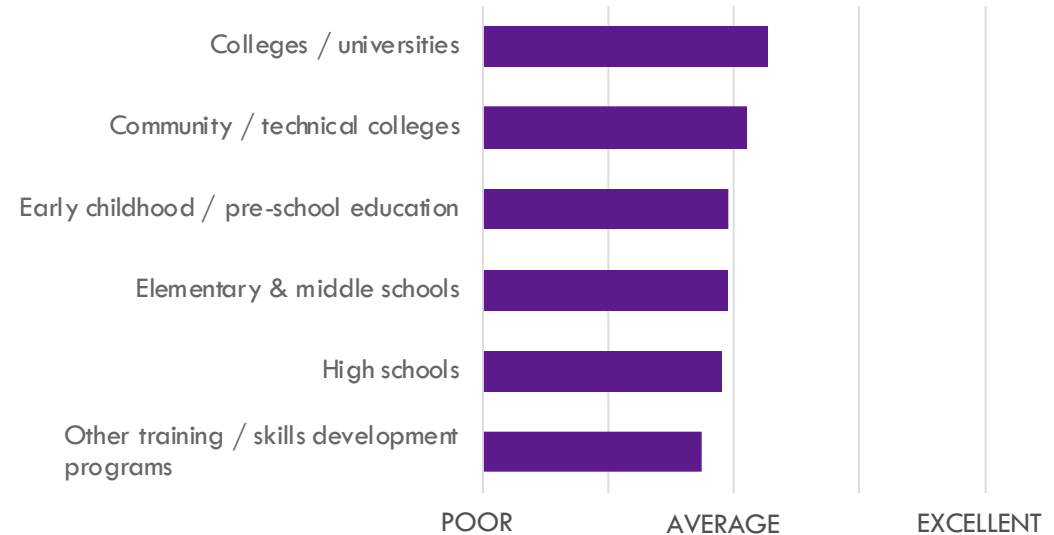
Perceptions of Education & Training

Like other rankings, Laurens County's education and workforce development rankings are "average" across the board.

Community/technical colleges and colleges/universities received the most "above average" and "excellent" ratings, which shows more confidence in Laurens County's higher education institutions compared to K-12 schools.

Other training/skills development programs received the highest ranking of "not applicable/not sure" responses, which might indicate a lack of awareness of alternative training and career options among residents and workers in the County.

PERCEPTION OF EDUCATION & TRAINING (IN DESCENDING ORDER)



Perceptions of Quality of Place

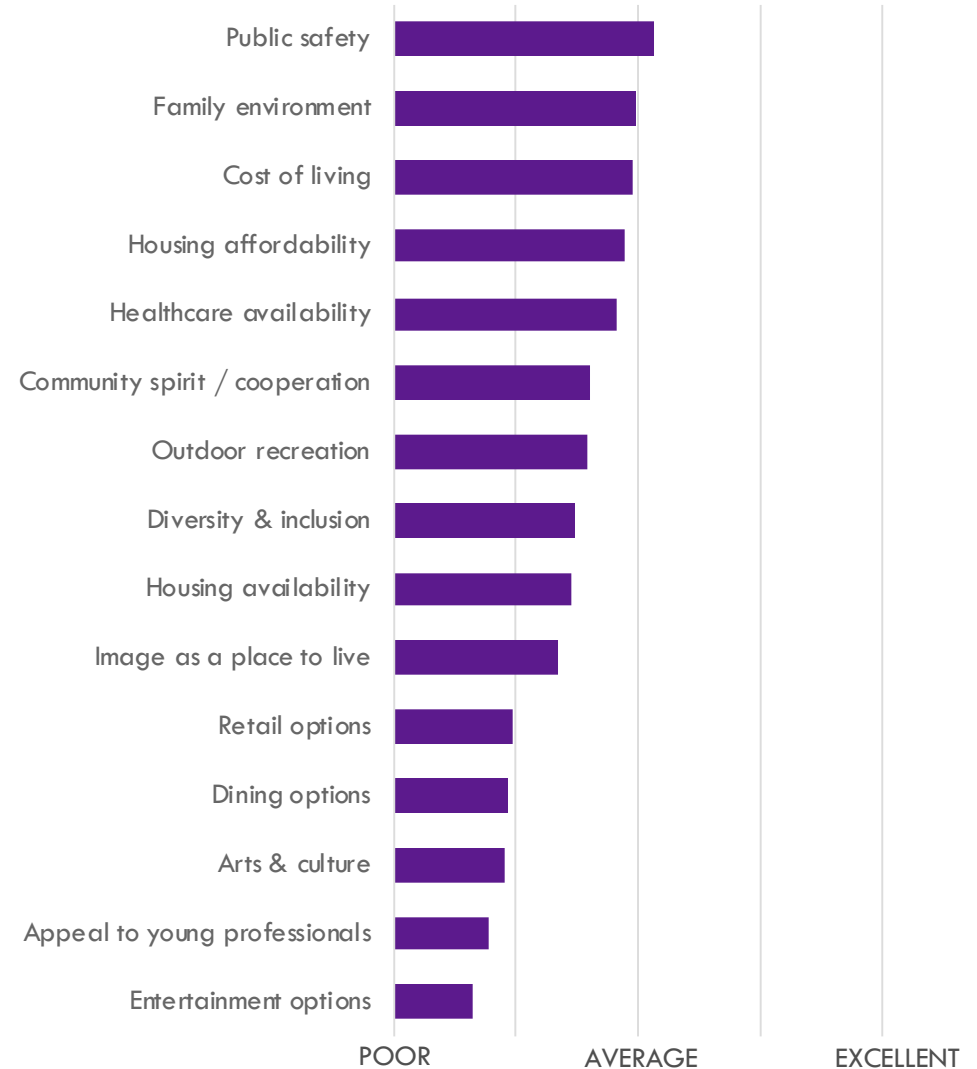
Respondents ranked Laurens County's quality of place attributes "average" in seven out of 15 categories, with the remaining eight all receiving "below average" rankings.

Laurens County residents and workers ranked Laurens County's public safety, family environment, cost of living, housing affordability, housing availability, community spirit and outdoor recreation as its best quality of life amenities, with each category receiving more "above average" rankings than other categories.

Laurens County's lowest quality of life rankings were for retail options, arts and culture, appeal to young professionals, and entertainment options. This signals a clear need from the community for more entertainment, dining, and shopping.

Among general economy, business climate, education & workforce development, and quality of place rankings, quality of place received the lowest rankings across the board.

PERCEPTION OF QUALITY OF PLACE FACTORS (IN DESCENDING ORDER)

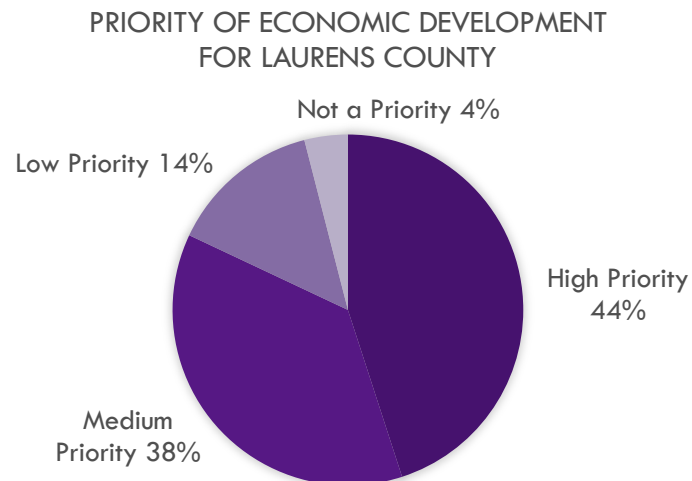


Economic Development Priorities

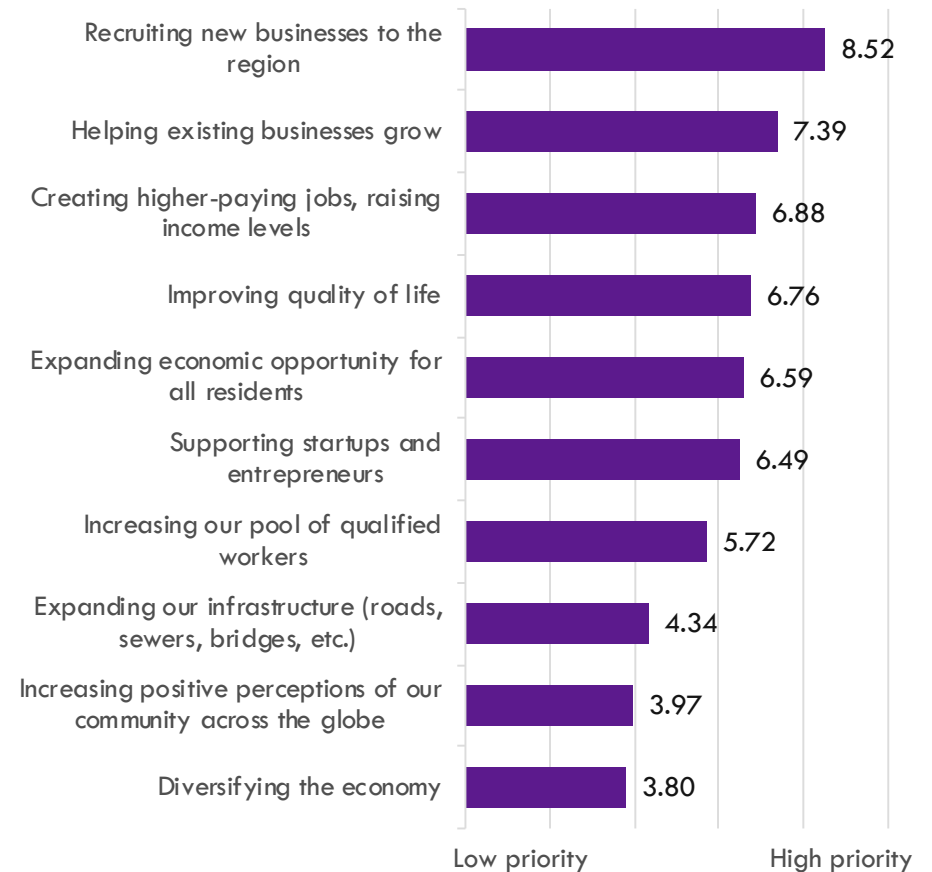
Almost half of survey respondents identified economic development as a “High Priority” for Laurens County. Only 4% of respondents thought that economic development should not be a priority at all.

The top three economic development priorities that survey respondents identified were recruiting new businesses to the region, helping existing businesses grow, and creating higher-paying jobs/raising income levels.

Improving quality of life was the fourth most important priority according to survey respondents, which is a common theme throughout the open-ended questions of the survey.



TOP ECONOMIC DEVELOPMENT PRIORITIES FOR LAURENS COUNTY



Economic Development Priorities

DESIRED INDUSTRIES

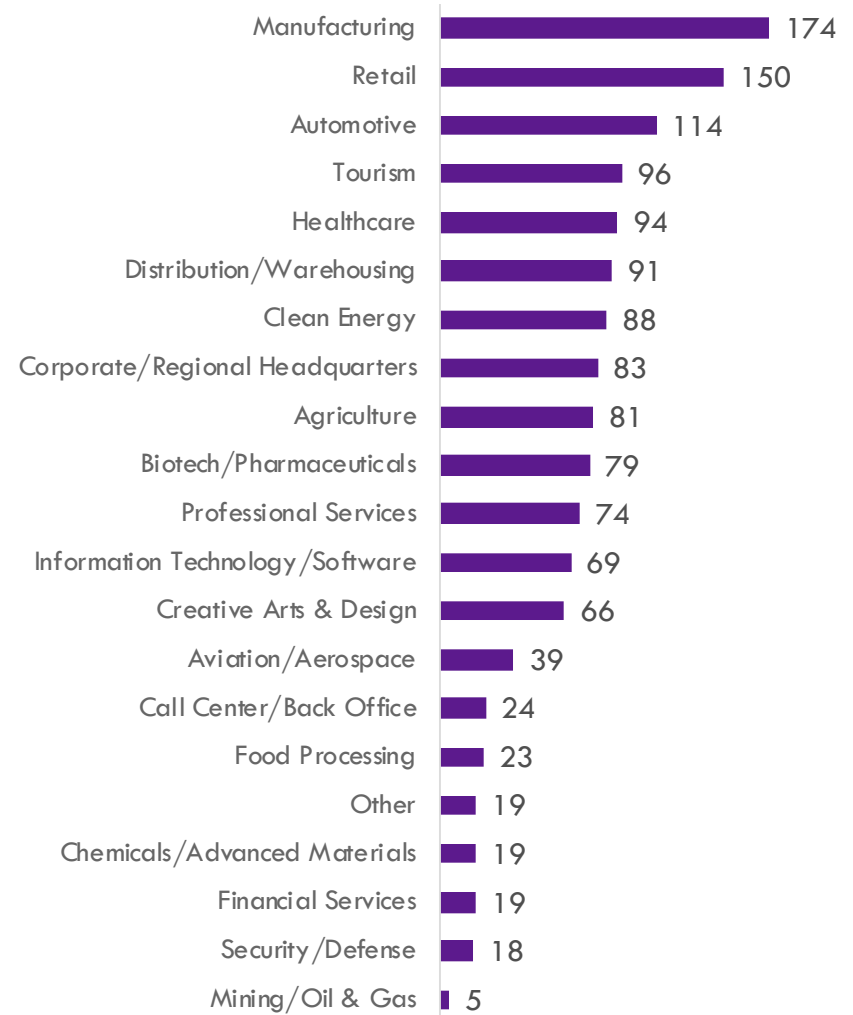
When asked which industries survey respondents would like to see drive economic growth in Laurens County, the most popular responses were Manufacturing, Retail, and Automotive, followed closely by Tourism and Healthcare.

Manufacturing, specifically Automotive, received the most votes as a driver for future economic growth. Together, these two industries received nearly 290 votes.

Retail received the second most votes. The large number of respondents wanting to see more retail in the community likely stems from the call for improved quality of life in Laurens County and more dining, shopping and entertainment options rather than a belief that retail will boost the County's economy.

Respondents also see an opportunity for the Tourism and Healthcare industries to drive growth in Laurens County.

TOP INDUSTRIES FOR GROWTH IN LAURENS COUNTY

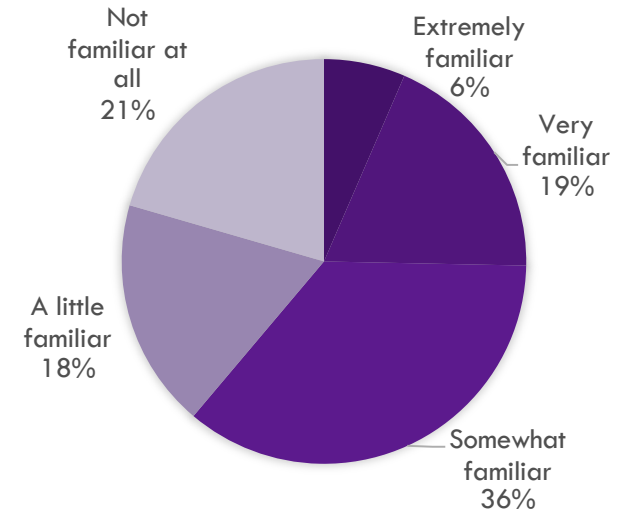


Performance of LCDC

Most respondents were “somewhat familiar” with the Laurens County Development Corporation. 21% of respondents cited they were “not familiar at all” with LCDC. With only a quarter of respondents being “extremely familiar” or “very familiar,” there is room for improvement in sharing the LCDC story within the county.

Respondents' ranking of LCDC's performance was average at 3.2 out of 5 stars. The comments on LCDC's performance ranged from supportive to negative and suggest an opportunity to improve LCDC's image in the community.

FAMILIARITY WITH LCDC



PERFORMANCE OF LCDC



3.2 OUT OF 5 STARS

Performance of LCDC

LCDC Performance

Many respondents understand the basic purpose of the LCDC and see its role in terms of traditional economic development. More than half of respondents said recruitment was the purpose of the LCDC and was by far the most common response. Many respondents also gave the general answer of growing the Laurens County economy but did not identify any specific activities or roles. Business retention and expansion and increasing jobs were also popular answers.

Other economic development activities, like improving quality of life, developing a talented workforce, and marketing all received less than half the responses that recruitment did.

This signals that in the mind of the community, important economic development tasks like workforce development, business retention and expansion, and trying to grow wages are all secondary to job recruitment. This belief might explain the average ratings of the LCDC's performance.

“Grow new and current businesses in Laurens Co.”

“Bring in new jobs and improve quality of life.”

“To promote Laurens County and the benefits of doing business here”

“Recruit businesses, work with local businesses that want to grow, find space for new projects, promote Laurens County”

“I do not know.”

“To help Laurens County grow into a place people want to come live, play and work in which will in turn improve the economy and education of those who live here.”

“Revive the image and stamina of Laurens County.”

“Aid the existing workforce and create a better job market”

“Identify strengths and weaknesses of development across the county and strategically drive industries, local government, and other stakeholders toward common goals of economic development and equity”



Community Aspirations

Magic Wand

When asked what is the one thing they would improve about Laurens County's economy, the majority of responses cited quality of life improvements, job creation (especially higher-paying jobs), improving education and training opportunities, changing land use policies, and improving marketing efforts.

- **Quality of life** – Respondents expressed the need for beautification throughout the community, more diverse housing options that are affordable, more retail and restaurants, and improved infrastructure.
- **Job creation** – Respondents called for more jobs and higher pay but were often unclear about what industries or opportunities they wanted to see in Laurens County. The industry most often mentioned was Manufacturing.
- **Improve education and training opportunities** – The call for education improvements was often in reference K-12 schools. Many respondents also wanted options to better prepare students from a younger age for local jobs.
- **Land use** – Many respondents expressed the need to make Laurens County more development-friendly by implementing zoning throughout the county, making improvements to infrastructure, and beautification.
- **Marketing** – Respondents wanted to change the negative perceptions about Laurens, both internally and externally. They desire improved external marketing focused on recruiting talent and businesses by letting them know what Laurens County has to offer, and internal marketing that increases communication between residents and leaders and heightens community pride.

"Qualified work force for today's industrial technologies."

*"More housing in general, as well as **affordable housing options** for residents 25-35."*

*"Recruit more **manufacturing industries to provide higher paying job opportunities** to the citizens so they don't have to drive out of the county to make a living."*

"Improve image as a business-friendly destination."

"Educating/training our current residents so that they're able to staff the kind of business we 'want' to have."

*"More **retail options and dining options** other than fast food. People drive 30-45 mins just to shop and eat a good meal."*

*"We need to have **zoning** to create better diversification across the county."*



Community Aspirations

When survey respondents were invited to give final thoughts, 81 respondents chose to do so and often reinforced responses to the Magic Wand question.

A consistent refrain throughout these additional responses was a call for more positive communication within the community. Respondents feel that Laurens County has assets that could be better marketed, and that more discourse is needed between residents and leadership. Some noted negativity and politics at play among County leadership that they believed are holding back the County from reaching its true potential.

*“Continue to follow through with existing plans. **Provide continued support for existing businesses. Encourage and support entrepreneurs. Listen to new ideas and thoughts.**”*

*“Publicize your county development more **with info around town, flyer, advertisement in the mailbox or on TV.** Most people probably don't even know this exists.”*

*“I wish we could **promote Lake Greenwood** more and our great hunting, fishing, etc. There is major potential here. We've just got to find the right fit!”*

*“**More interaction between residents and businesses** would help both the LCDC as well as the residents by putting us on the same page and task.”*

*“**Inclusion - incorporate new methods to draw participation of county residents.** Typically the LCDC is only open or has events during normal business hours. Which are difficult for residents who work outside of the county to attend.”*

*“Consider how we might **better invest in the education and skills-building of our workforce,** so as we draw industries into Laurens County, we have the workforce to support that development.”*

