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C A R O L I N A

GEORGETOWN COUNTY

SITUATION ANALYSIS

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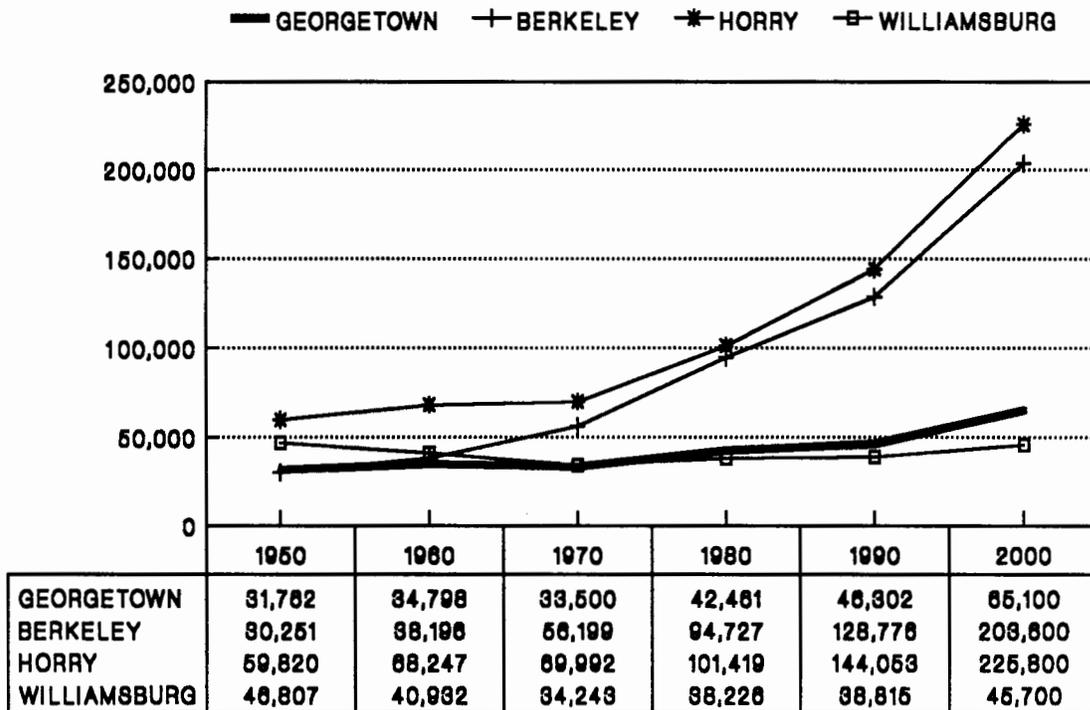
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POPULATION

As indicated in the following chart, Georgetown County has experienced an increase in population from 31,762 in 1950 to 46,302 in 1990, representing a 45.7% increase in population. Williamsburg is the only county in the region that experienced a decrease in population, approximately 17%, during the same time period. Berkeley County experienced a 325.7% increase and Horry experienced a 140.8% increase in population during the same period of 1950 to 1990.

POPULATION COMPARISONS GEORGETOWN AND SURROUNDING COUNTIES 1950 - 2000

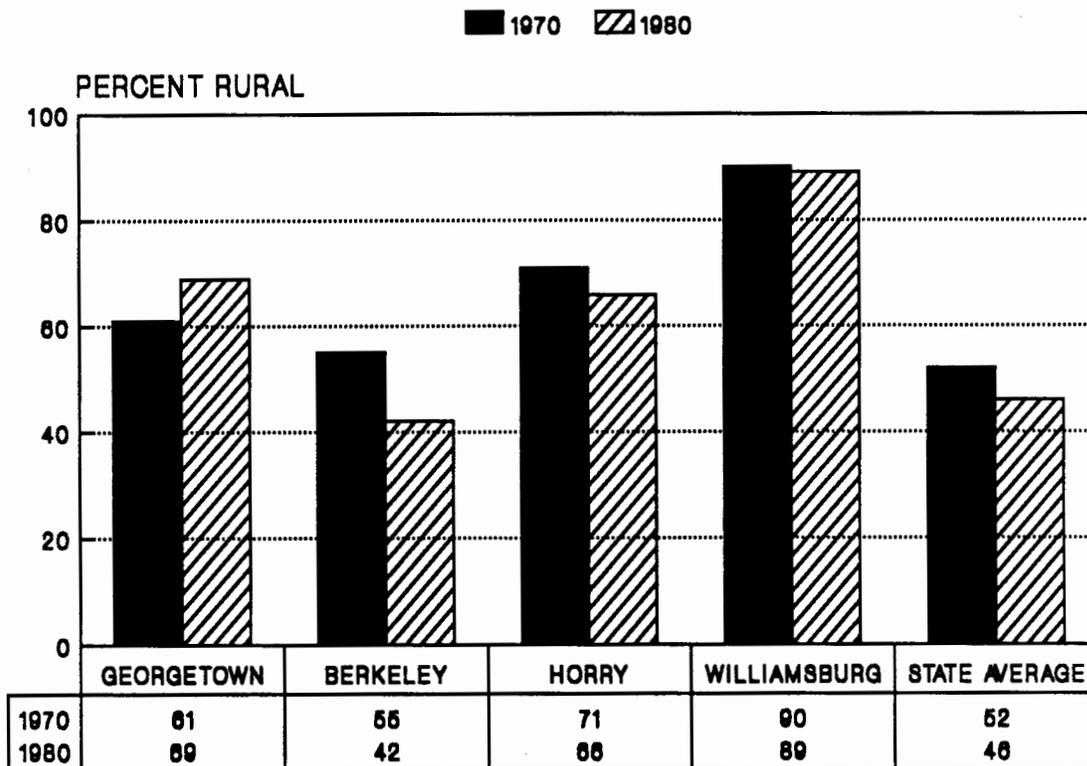


SOURCE: S. C. STATISTICAL ABSTRACT 1991;
U. S. CENSUS BUREAU

Rural Population

From 1970 until 1980, Georgetown County had a 13.1% increase in rural population, the only increase in the region. Berkeley County had a 23.6% decrease, Horry County had a 7.0% decrease and Williamsburg County had a 1.1% decrease. The overall state average had an 11.5% decrease in rural population.

PERCENT RURAL POPULATION GEORGETOWN, BERKELEY, HORRY AND WILLIAMSBURG COUNTIES 1950 - 2000



SOURCE: S. C. STATISTICAL ABSTRACT 1991

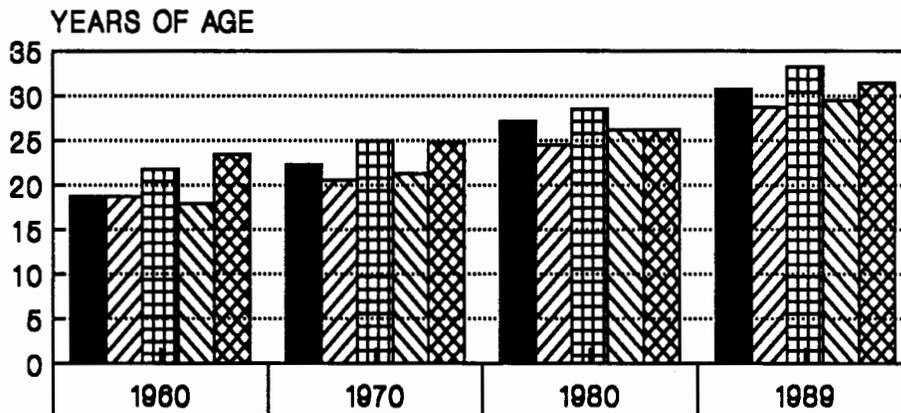
Age of Population

In 1960, the median age in Georgetown County was 18.7 years of age, well below the state average of 23.4 years. Georgetown County's median age in 1989 was 30.7 years which was younger than the state average of 31.4 years. Horry County had the highest median age with 33.2 years. Berkeley County had the youngest median age in the region with 28.7 years and Williamsburg had the second youngest median age in the region with 29.5 years.

MEDIAN AGE OF POPULATION FOR GEORGETOWN BERKELEY, HORRY AND WILLIAMSBURG COUNTIES AND S. C. 1960 - 1980

GEORGETOWN
 BERKELEY
 HORRY

 WILLIAMSBURG
 S. C.



	1960	1970	1980	1989
GEORGETOWN	18.7	22.3	27.1	30.7
BERKELEY	18.7	20.8	24.5	28.7
HORRY	21.8	24.9	28.5	33.2
WILLIAMSBURG	17.9	21.3	28.2	29.5
S. C.	23.4	24.8	28.2	31.4

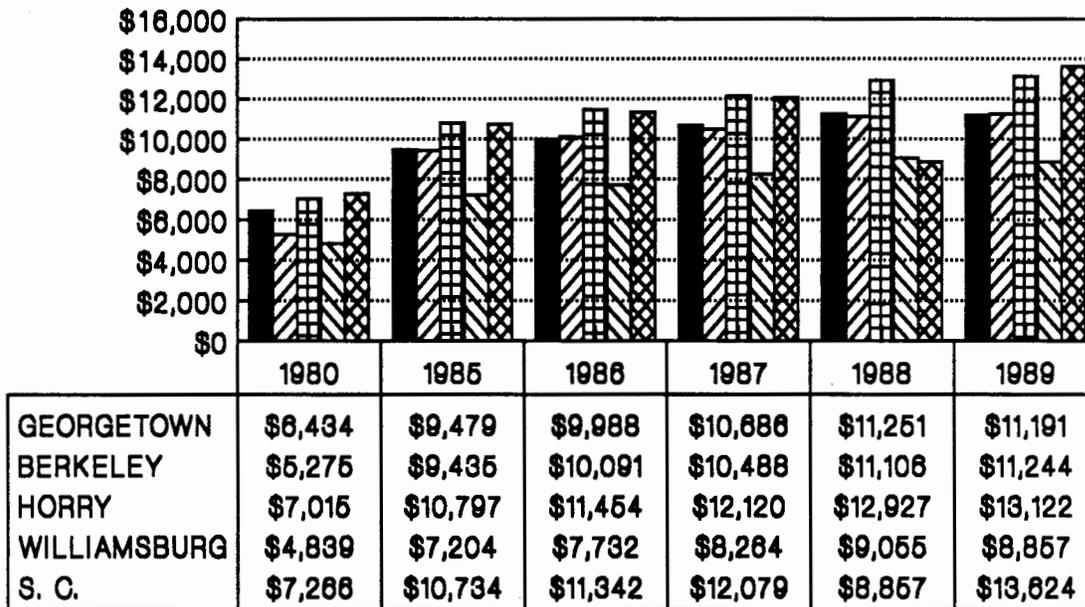
SOURCE: S. C. STATISTICAL ABSTRACT 1991

INCOME

Georgetown County had the least amount of increase in per capita income, from \$6,434 in 1980 to \$11,191 in 1989 or 73.9%. Berkeley had the highest increase in the region of 113.2%, Horry had an 87.1% and Williamsburg had an 83.0% increase. The overall state per capita income increased 87.5% during that time period.

PER CAPITA INCOME BY COUNTY AND FOR STATE 1980 - 1989

GEORGETOWN
 BERKELEY
 HORRY
 WILLIAMSBURG
 S. C.



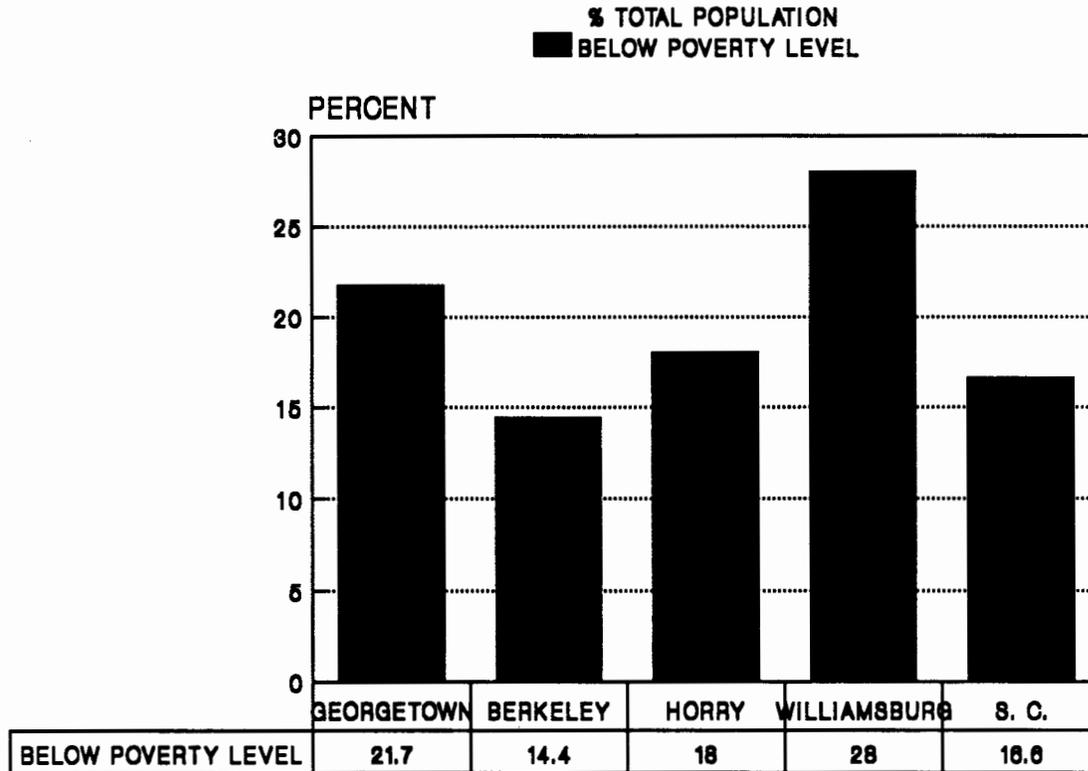
SOURCE: U S BUREAU OF ECONOMIC ANALYSIS

Georgetown County was 21.7% below the state's average per capita income in 1989.

Poverty

Twenty-one and seven tenths percent (21.7%) of Georgetown County's population was judged to be below the poverty level in 1979. This was the second highest in the region and 30.7% above the state average.

PERCENT TOTAL POPULATION BELOW POVERTY LEVEL BY COUNTY - 1979

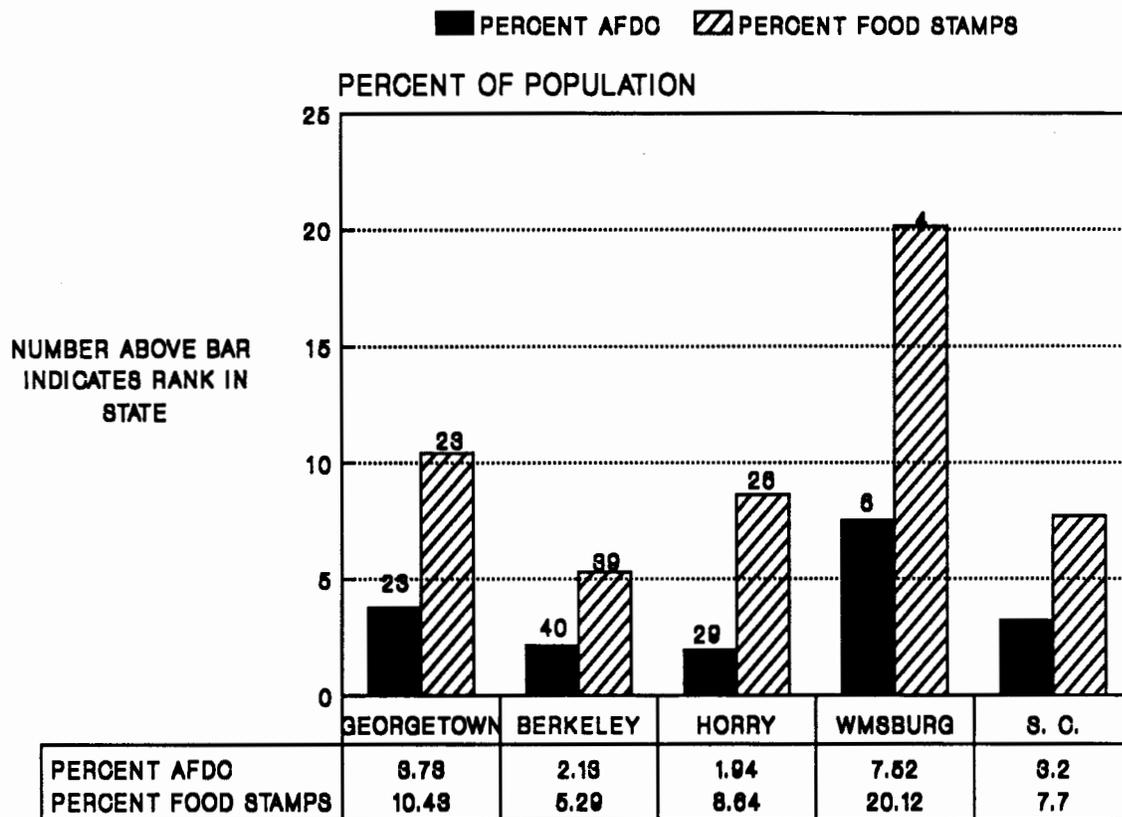


SOURCE: S. C. STATISTICAL ABSTRACT 1991

AFDC and Food Stamps

Georgetown County ranked 23rd in the state in percent of population receiving Aid to Families with Dependent Children, 3.73%, and 23rd in the percent of population receiving Food Stamps (June 1990), 10.43%.

PERCENT OF POPULATION PARTICIPATING IN AFDC AND FOOD STAMPS - JUNE 1990



SOURCE: S. C. STATISTICAL ABSTRACT 1991

ECONOMIC DEVELOPMENT

Labor Force and Wages

County of Georgetown

This labor force profile examines three issues: (1) labor force characteristics, (2) the availability of labor, and (3) estimated statistics, as well as site-specific information on the labor force in Georgetown County.

LABOR FORCE CHARACTERISTICS

The composition and size of an area's labor force is linked very closely with demographic and economic conditions and trends in the region. The following labor force profile provides basic information on the population base and labor force characteristics so that the reader can better assess labor force conditions in the community.

Civilian Population:

The civilian population (excluding military personnel) in Georgetown County is 53,100.

Labor Force:

The total civilian labor force in Georgetown County is 23,640 (Jan 1991). The civilian labor force count represents all non-military employed and unemployed workers residing in the area which is being examined.

In general, South Carolina's labor force is younger than the national average and more women participate in the labor force as full-time workers. The median age in South Carolina is 31.7 (1990), compared with the nationwide average of 33.0. The following table summarizes the demographics characteristics of the working age population in the community, the county and the state.

GEORGETOWN COUNTY	COUNTY	SOUTH CAROLINA
Total Civilian Population (1990):	53,100	3,575,825
Distribution by Age (1990):		
18-24	10.7%	11.0%
25-44	31.0%	33.2%
45-54	9.2%	9.9%
55 & up	19.4%	19.4%
Distribution by Sex (1990):		
Male	47.3%	48.0%
Female	52.7%	52.0%
Education (Age 16-69)		
At least 12 yrs.	62.4%	63.9%
College graduate	11.7%	13.9%

Employment:

The total non-agricultural wage-and-salary employment for the county was 18,200 (Jan 1991). Employment data include all full- and part-time wage and salaried workers employed in the county. Employment statistics are compiled by place of work. Consequently, these employment statistics are based only on people who work in the county or study area. These people may or may not reside in the county or study area.

GEORGETOWN COUNTY	COUNTY	SOUTH CAROLINA
Employment (Jan 1991):	18,200	1,535,900
Percent Change (1980-1991):	36.2%	29.2%

Employment by Sector:

The following two tables examine the distribution of employment by sector. The table on the left compares employment by sector in 1980 and 1989. The table on the right provides a more detailed analysis of employment within the manufacturing sector in 1989.

<u>Employment By Sector</u>	<u>1980</u>	<u>1989</u>	<u>Manufacturing Employment</u>	<u>1989</u>
Construction	5.6%	5.6%	Durable Goods	37.8%
Manufacturing	35.0%	26.8%	Lumber & Wood	8.2%
Transport/utilities	2.6%	3.0%	Furniture	0.0%
Wholesale/retail	19.4%	24.0%	Stone/clay/glass	2.0%
Finance/insur/real est	3.5%	4.8%	Primary Metals	20.5%
Services	14.9%	15.8%	Fabricated Metal	1.9%
Government	18.9%	20.0%	Machinery/not Elec	1.0%
			Elec Equipment	4.3%
			Transport Equipment	0.0%
			Instruments	0.0%
			Misc.	0.0%
			Non-durable Goods	62.2%
			Food/kindred Prods	1.4%
			Textiles	29.1%
			Apparel	4.7%
			Paper/allied Prods	24.4%
			Printing/publishing	1.1%
			Chemicals	1.3%
			Rubber/plastic	0.2%
			Petroleum	0.0%
			Misc.	0.0%

Occupations:

Overall, South Carolina boasts a higher per capita percentage of craftsmen, operatives, and laborers than the average percentages for the nation or the Southeastern states. U.S. Bureau of Labor Statistics indicate that 20.2 percent of the employees in South Carolina were craftsmen, operatives, and laborers in 1987, compared with a 13.2 percent national average.

LABOR AVAILABILITY

Labor Force Participation Rate:

The labor force participation rate in Georgetown County is 44.5 percent. The labor force participation rate is the ratio which results from dividing the civilian labor force count by the total civilian population. South Carolina's average labor participation rate is 48.3 percent (1990). The U.S. average participation rate is 50.2 percent.

1991 LABOR FORCE PARTICIPATION RATES

	<u>COUNTY</u>
Labor Force:	23,640
Participation Rate:	44.5%

Unemployment Rate:

The unemployment rate in the county was 10.5 percent (Jan 1991), compared with the state rate of 5.9 percent. By comparison, Georgetown County's unemployment rate one year previously (Jan 1990) was 10.4 percent, and the state rate was 4.8 percent.

The unemployment rate reflects the number of individuals who are actively seeking work. The unemployment rate should be used in conjunction with other labor force data to obtain a more comprehensive picture of the availability of qualified recruitable labor. Labor can be attracted from a number of sources including the unemployed, new entrants to the labor force, the underemployed, and commuters from surrounding areas. In addition, the number of households with incomes below \$10,000 annually in a community provides additional information on a group of workers which may be available for job upgrades if wage increases and training programs are available. The following table provides estimates of the numbers of new entrants, unemployed, lower-income households, and non-participants in the labor force.

SOURCES OF LABOR SUPPLY

Estimated Number of County Residents Age 18 to 54 Who Are Not Currently Participating in the Labor Force	8,249
Estimated Number of County Residents Who Are Currently Unemployed	2,490
Estimated Number of County Residents Expected to Reach Age 18 Between 1988 and 1992	4,246
Estimated Number of Households Where Household Income Is Less Than \$10,000	4,061

Work Stoppage Rates

South Carolina has consistently had one of the lowest work stoppage rates in the United States. In 1989, an average of only .001% of working time was lost due to strikes in manufacturing and non-manufacturing industries combined.

Wages and Salaries - Georgetown County

The average wage for all full-time and part-time wage and salaried workers in Georgetown County was \$17,784 in 1989. As the following table indicates, average wages in South Carolina overall are below the U.S. average.

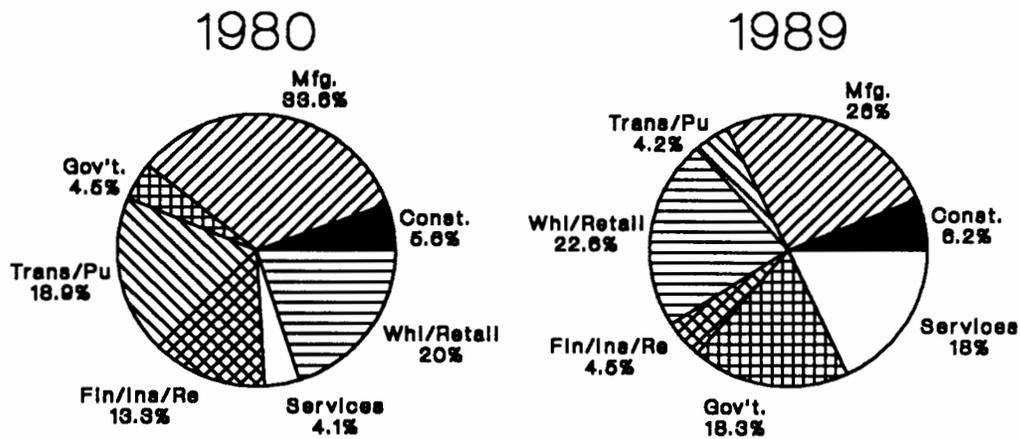
AVERAGE WAGES AND SALARIES

	<u>1989 Wages & Salaries</u>	<u>1989 Prod. Wages</u>
Georgetown County	\$17,784	N/A
South Carolina	\$18,797	\$8.51/hr.
U.S.	\$22,567	\$10.47/hr.

Employment by Sector

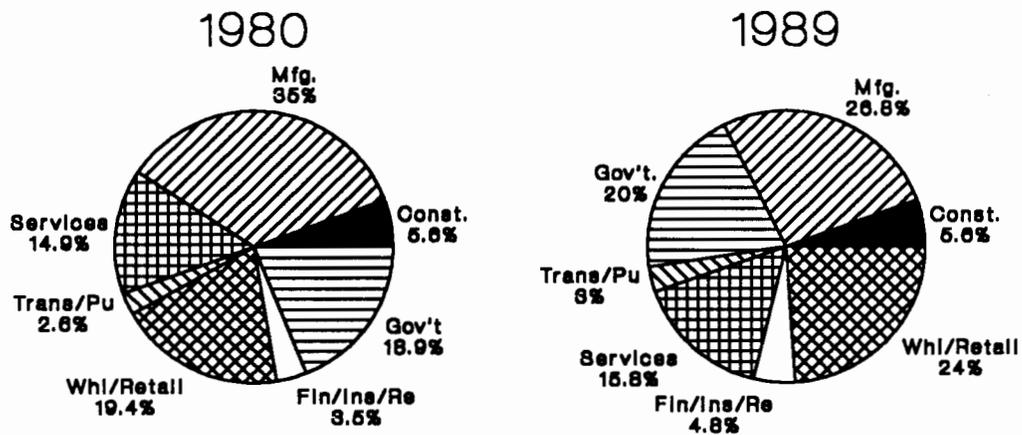
The following graphs compare Employment by Sector for South Carolina and Georgetown County for the years 1980 and 1989.

SOUTH CAROLINA EMPLOYMENT BY SECTOR 1980 AND 1989



SOURCE: S.C. COUNTY STATISTICAL PROFILES
MARCH 1991

GEORGETOWN COUNTY EMPLOYMENT BY SECTOR 1980 AND 1989

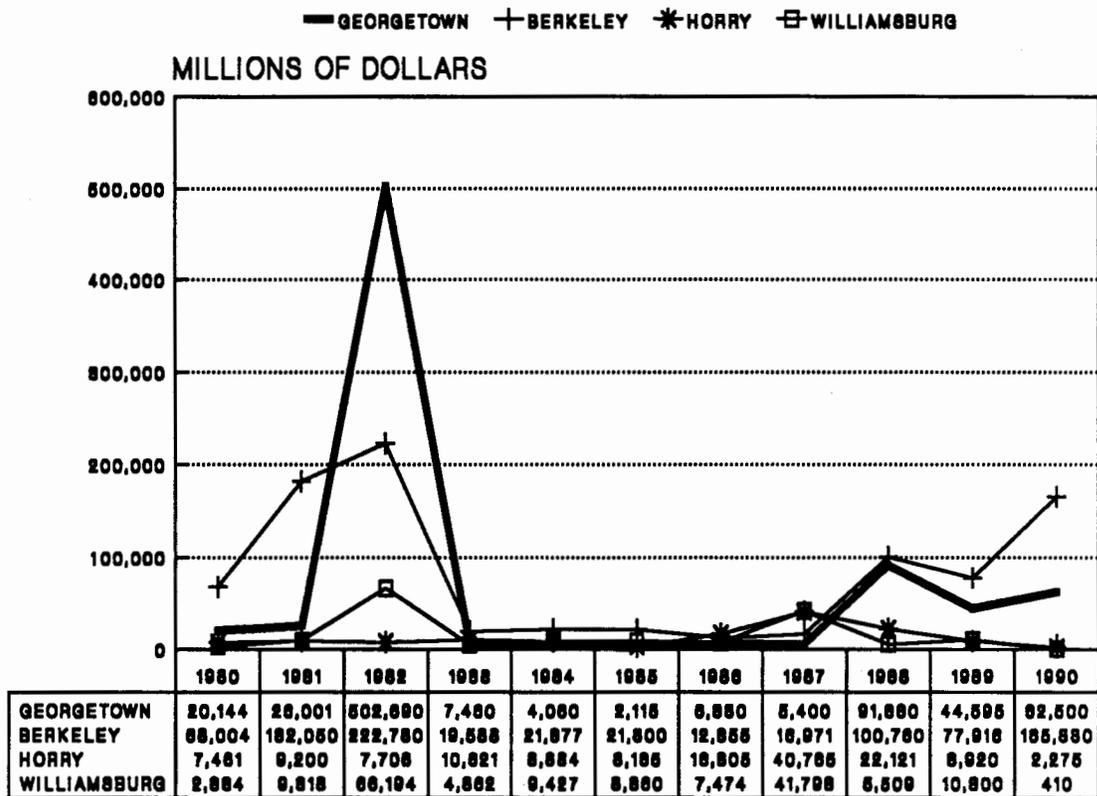


SOURCE: S.C. COUNTY STATISTICAL PROFILES
MARCH 1991

Capital Investment/Jobs Created

Georgetown County had the next to the highest amount of capital investment in the region between 1980 and 1990 with a total of \$722,685,000 during that time. Of that total amount, \$502,690,000 was invested in 1982. Berkeley County had the highest investment figures with a total of \$909,381,000 during that time. Williamsburg had a total of \$167,531,000 and Horry had \$137,373,000 during that same time period.

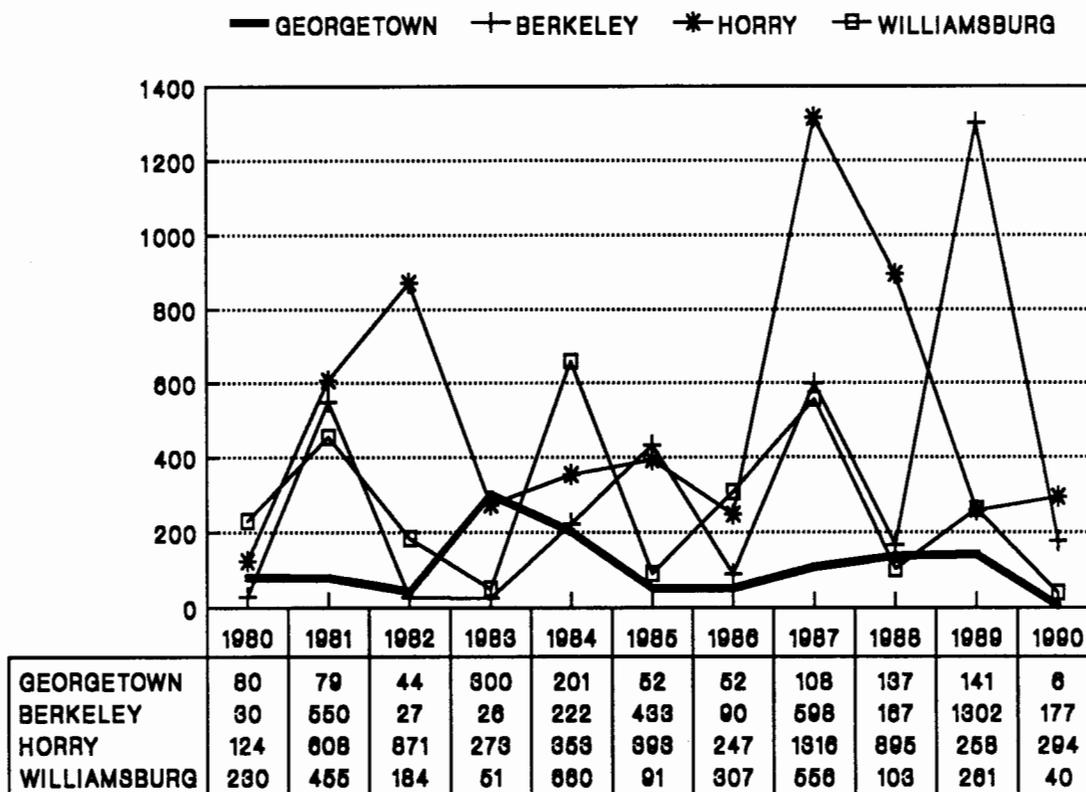
CAPITAL INVESTMENT (\$000) BY COUNTY 1980 -1989



SOURCE: SC COUNTY STATISTICAL PROFILES

Georgetown County was the lowest in the region in the number of jobs created between 1980 and 1990 with a total of 1,200. Horry County had the greatest number of jobs created with a total of 5,632, Berkeley with a total of 3,622 and Williamsburg with a total of 2,938 during that same time period.

JOBS CREATED 1980 - 1990 BY COUNTY

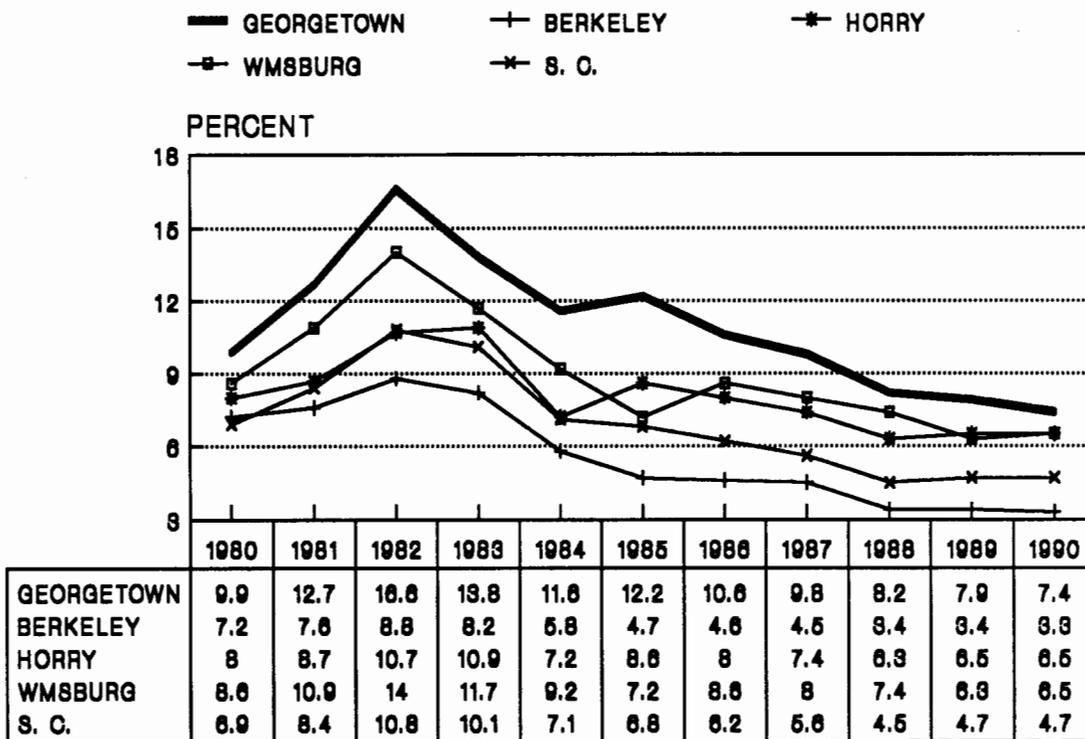


SOURCE: SC COUNTY STATISTICAL PROFILES

Unemployment Rates

The unemployment rate in Georgetown County has remained consistently higher than the state average and the other counties in the region. The county's highest unemployment rate was in 1982 at 16.6% while the state had a 10.8% rate. The lowest unemployment rate was in 1990 at 7.4% while the state average was 4.7%.

UNEMPLOYMENT RATES BY COUNTY AND THE STATE 1980 - 1990

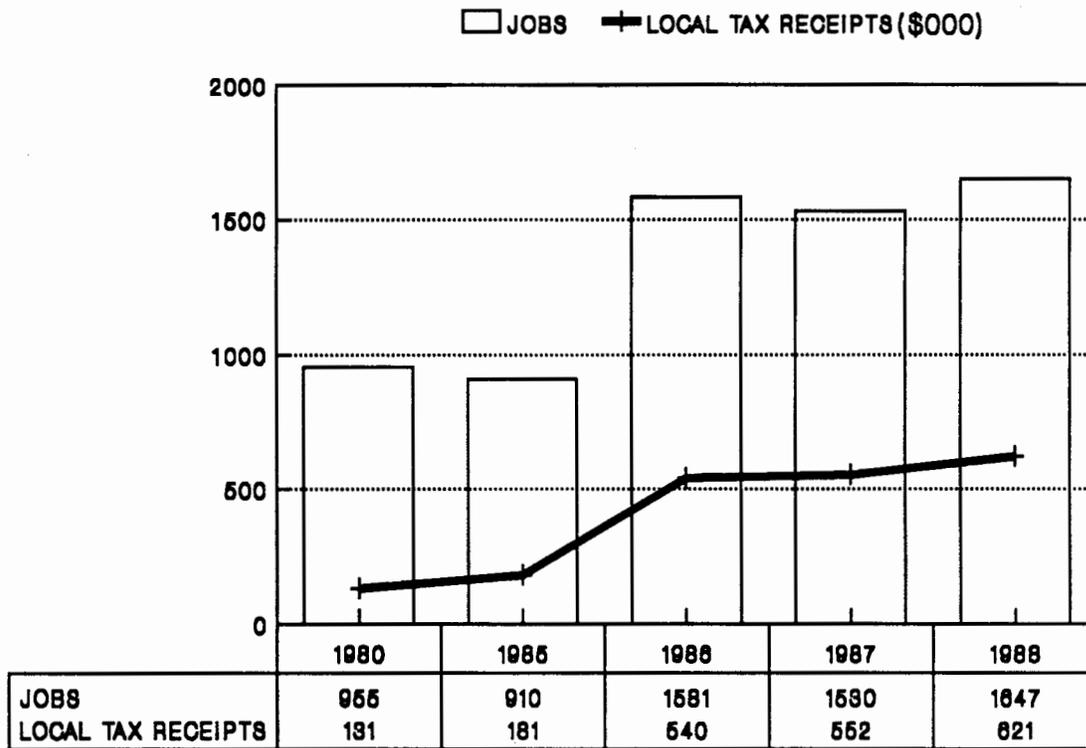


SOURCE: S.C. STATISTICAL ABSTRACT
1981 - 1991; EMPLOYMENT SECURITY COMM.
LABOR MARKET INFO DIV - SEPT. 1991

Impact of Travel

Georgetown County experienced a 72.5% increase in tourism related jobs from 1980 to 1988. There was a 374.0% increase in the amount of local tax receipts during that same time period.

GEORGETOWN COUNTY IMPACT OF TRAVEL 1980, 1985 -1988

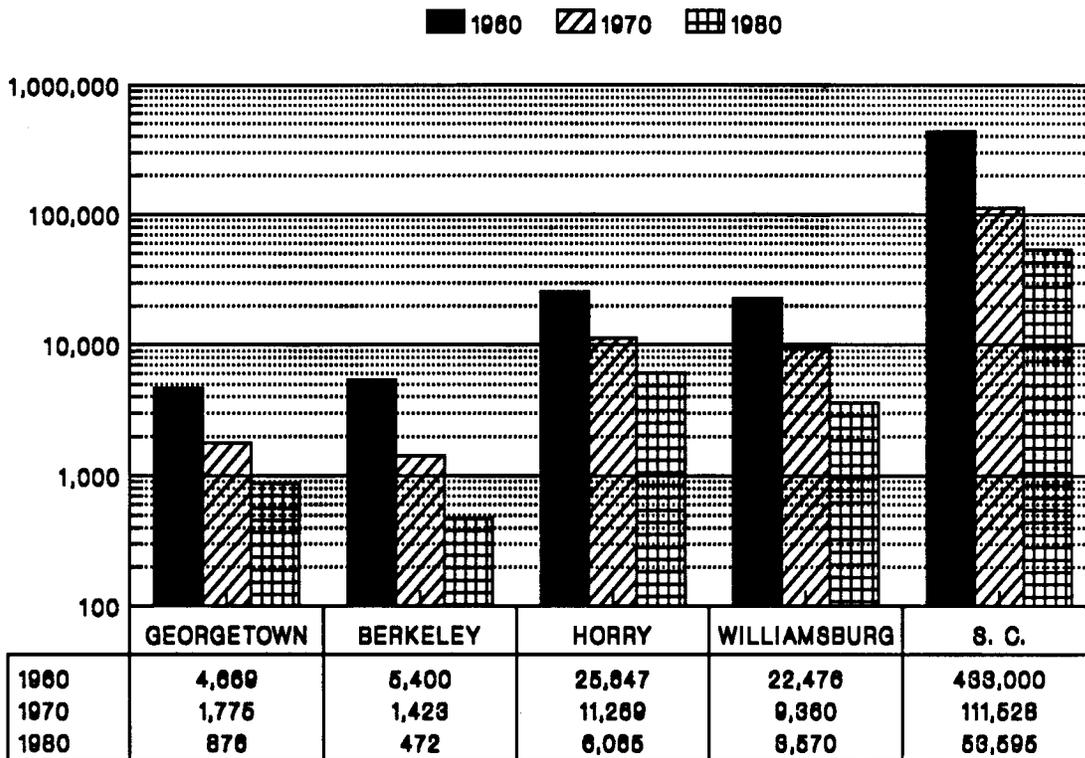


SOURCE: S. C. PRT

AGRICULTURE

Georgetown County had an 81.2% decrease in farm population, with population decreasing from 4,669 in 1960 to 876 in 1980. Other counties in the region also decreased: Berkeley, 91.3%; Williamsburg, 84.1%; and, Horry, 76.4%. The overall state average decreased by 87.6%.

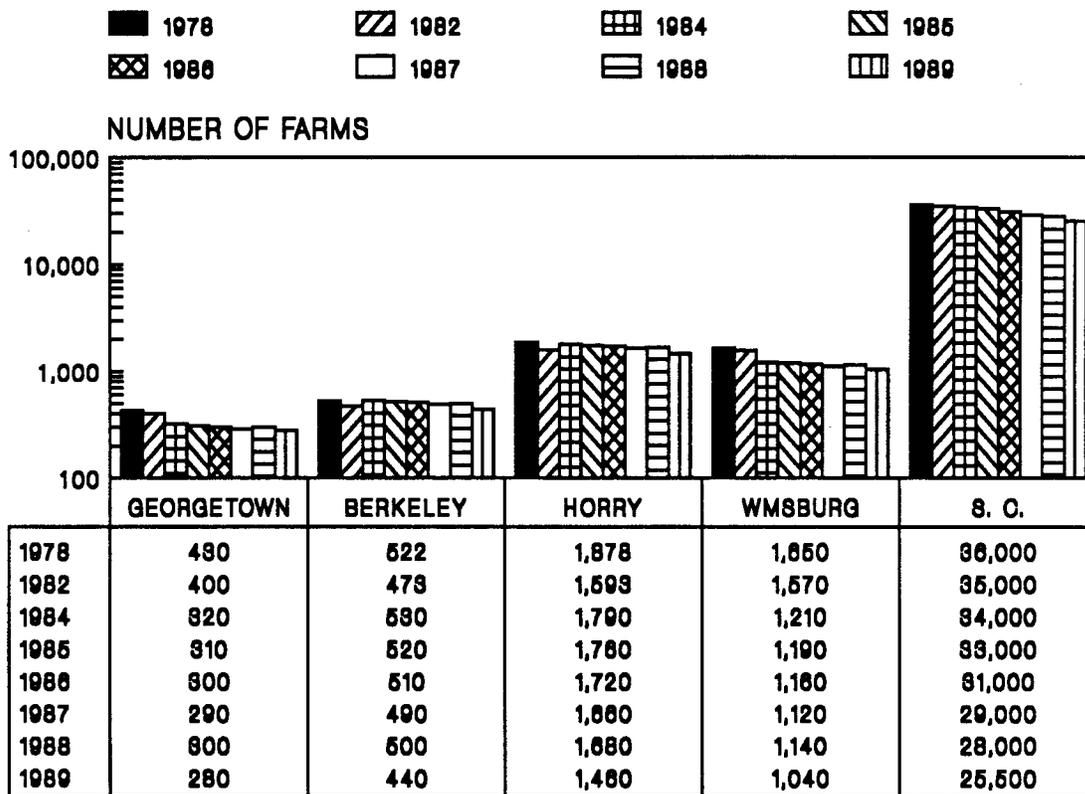
FARM POPULATION BY COUNTY 1960, 1970, 1980



SOURCE: CENSUS OF POPULATION;
1970 CENSUS OF HOUSING; AG STATISTICS SVC

Along with the loss of farm population, the number of farms for the entire region has also dropped during the period of 1978 to 1989, but not as dramatically as the farm population. Georgetown County had the next to highest decrease with 34.9%. Williamsburg County had the greatest decrease with 36.9%, Horry had a decrease of 22.3% and Berkeley had a 15.7% decrease. The overall state average was a 29.2% decrease.

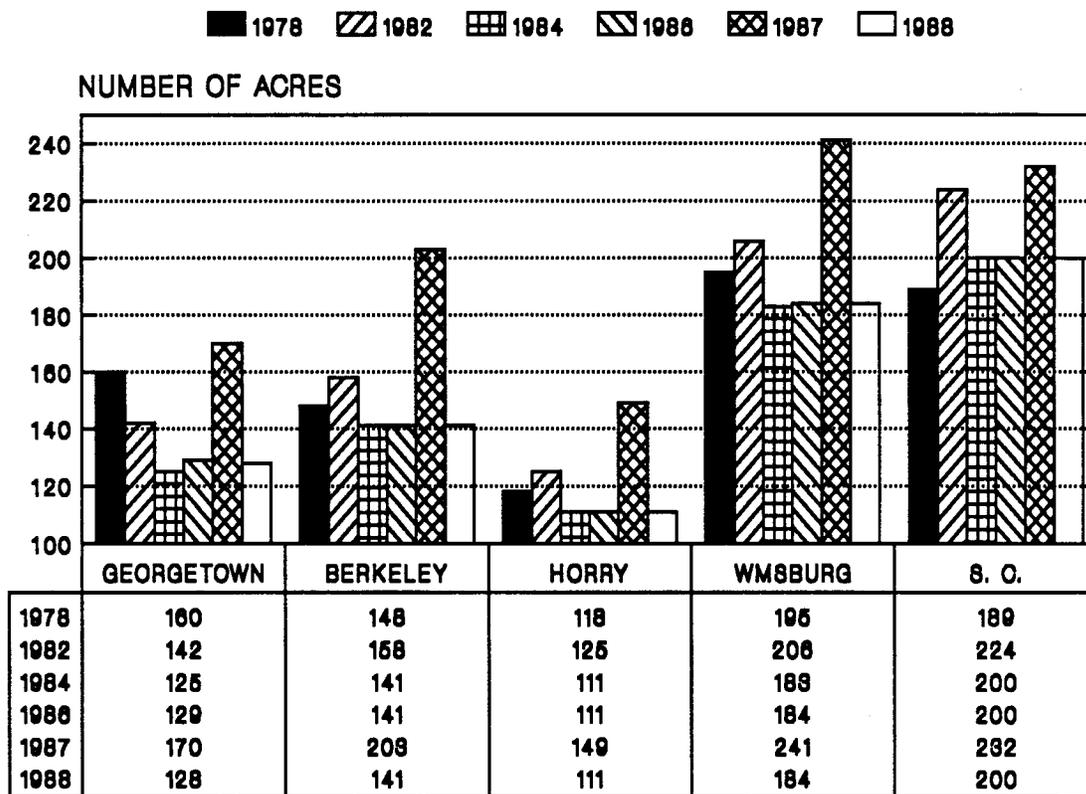
NUMBER OF FARMS BY COUNTY 1978 - 1989



SOURCE: CENSUS OF AGRICULTURE

Along with the decrease in farm population and numbers of farms, the average size of farms has also decreased in the region. Georgetown County had the highest percentage of decrease, 20.0%. Horry County had a decrease of 5.9%, Williamsburg had a 5.6% decrease and Berkeley decreased 4.7%. South Carolina had an increase from 189 to 200 acres or an increase of 5.8%

AVERAGE SIZE OF FARMS 1978 - 1988



SOURCE: CENSUS OF AGRICULTURE

RETAIL SALES

The total retail sales in Georgetown County in 1989 was \$267,609,000. Following is an estimate of how many retail dollars are "leaking" out of Georgetown and the other counties in this region. Retail leakage figures are the dollars earned inside the county by county residents but are being spent outside the county. These estimates are based on a formula using per capita income levels for Georgetown and other counties in the region. The formula takes into account differing per capita income levels, but assumes similar buying patterns. These figures are based on 1989 data.

1989 RETAIL LEAKAGE

Georgetown	-\$1,804.94
Berkeley	-\$4,075.30
Horry	+\$4,831.13
Williamsburg	-\$4,284.57

The formula for determining these figures is:

$$(A \times B) - C = D$$

Where:

A = The ratio of local per capita income to that of the state.

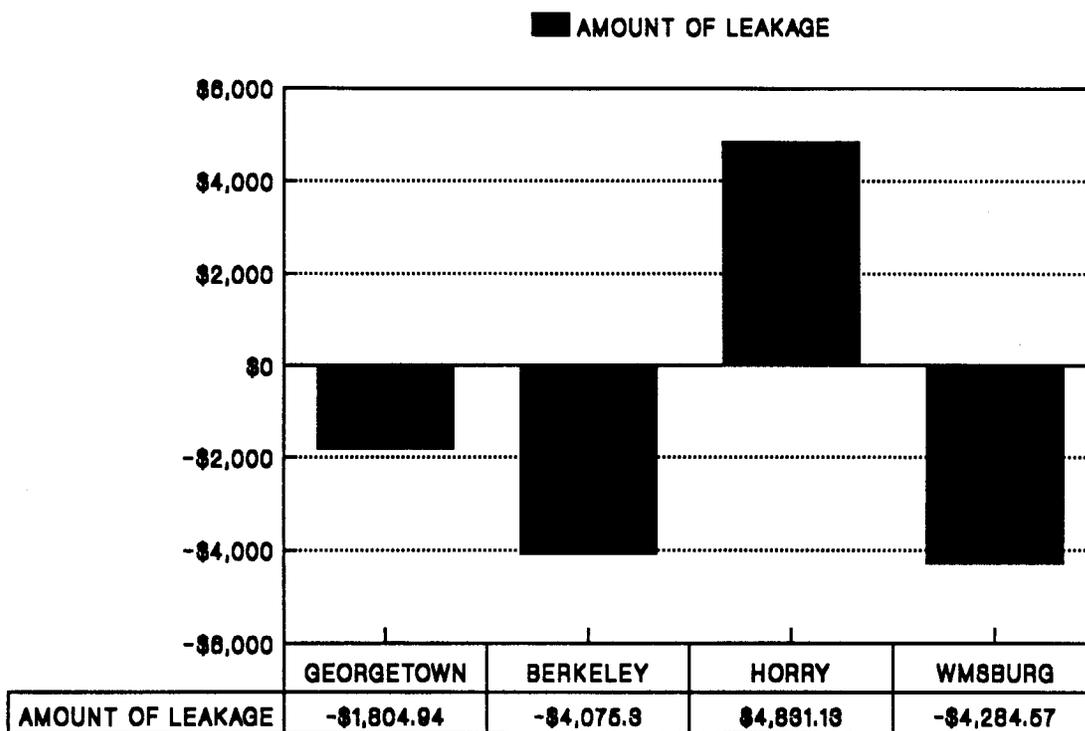
B = Local per capita sales for a given category.

C = SC per capita sales for that same category.

D = Per capita loss or gain for that category locally.

According to this model, approximately \$1,804.94 per person is being spent in retail establishments outside Georgetown County.

RETAIL LEAKAGE AS A RATIO OF STATEWIDE
SPENDING FOR GEORGETOWN COUNTY
AND REGION - 1989



SOURCE: SALES AND MARKETING MANGEMENT
SURVEY OF BUYING POWER

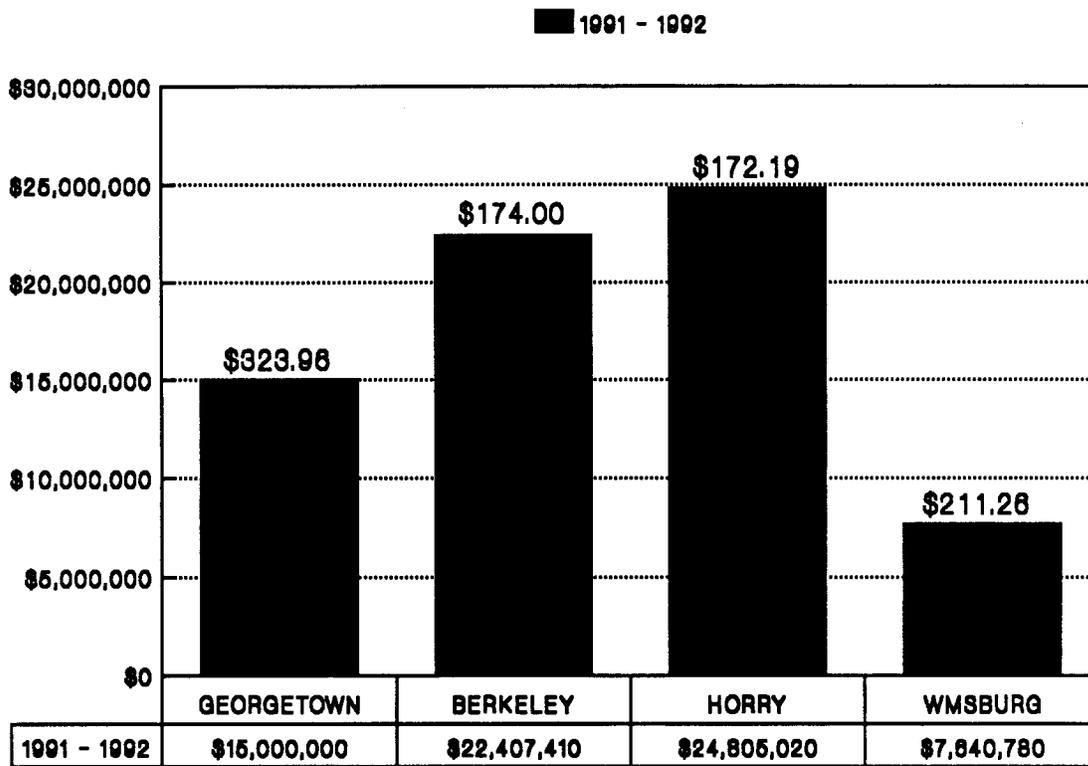
Following is additional information comparing per capita income amounts to per capita sales figures for 1989.

	PER CAPITA INCOME 1989	PER CAPITA RETAIL SALES 1989
Georgetown	\$11,191	\$5,299.18
Berkeley	\$11,244	\$2,523.28
Horry	\$13,122	\$11,409.31
Williamsburg S. C.	\$8,857 \$13,624	\$2,881.41 \$6,157.80

LOCAL GOVERNMENT

The operating budget, excluding education, for Georgetown and other counties in the region are compared in the following chart.

**COUNTY OPERATING BUDGETS FOR GEORGETOWN,
BERKELEY, HORRY AND WILLIAMSBURG
1991 - 1992**

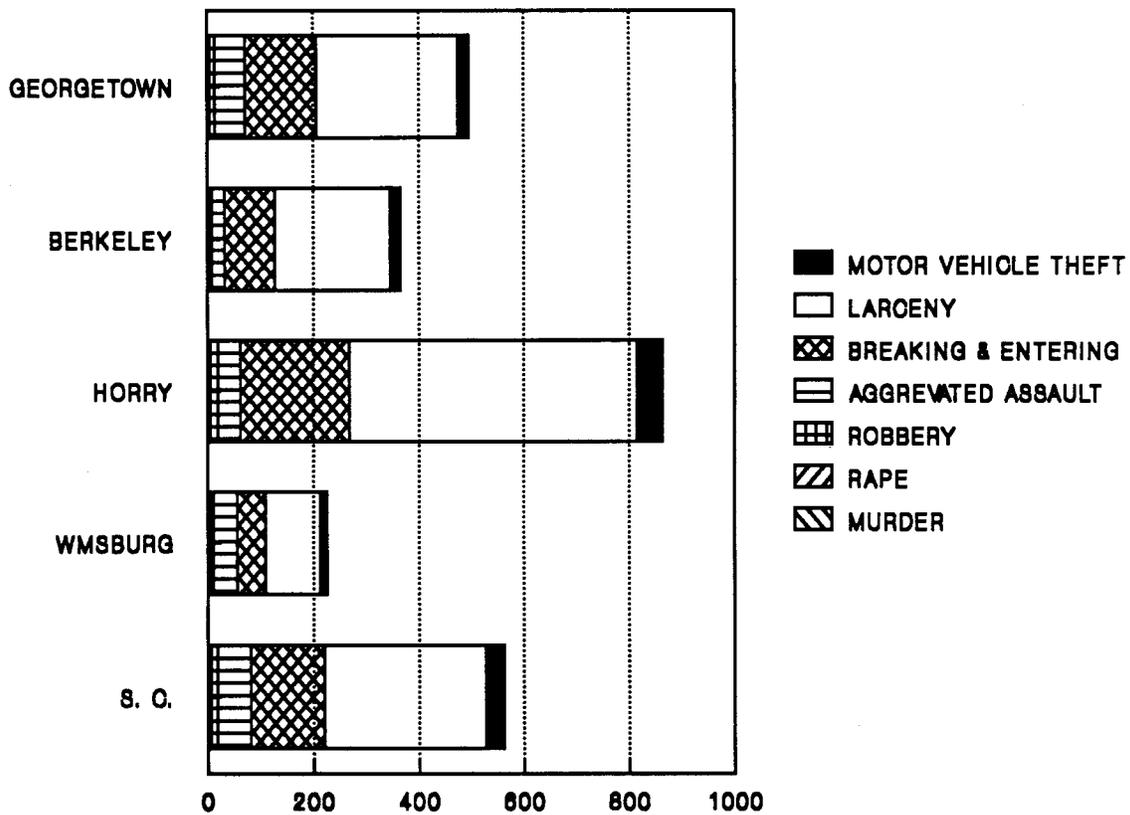


SOURCE: S. C. ASSOCIATION OF COUNTIES

The figures above the bars in this chart indicate the per capita budget amount by county. The population figures used to determine per capita are 1990 population.

Georgetown County's crime rates were below the state averages and next to the highest in the region. The category with the highest rate was 268.0 for larceny compared to the state's average of 306.3. Georgetown County's rape rate was 4.4 compared to South Carolina's rate of 4.7. The state's total crime index was 561.3. Georgetown County's total index was 495.0.

CRIME RATES - 1989 PER 10,000 POPULATION



SOURCE: S. C. STATISTICAL ABSTRACT 1991

INFRASTRUCTURE

Water and Sewer Capacities

All of the community water systems have excess capacity and overall the county has an excess of water available. The Wedgefield Plantation water system has the largest capacity and the most excess capacity. Overall, the total county water systems are using only about 5% of total capacity.

PUBLIC WATER SYSTEM CAPACITIES MUNICIPALITIES AND DISTRICTS

<u>NAME OF SYSTEM</u>	<u>TOTAL CAPACITY (MGD)</u>	<u>PEAK USAGE (MGD)</u>
GEORGETOWN, CITY OF	8.620	2.000
ANDREWS, TOWN OF	1.240	0.940
GEORGETOWN RURAL WTR.	1.300	0.491*
PENNY ROYAL	0.144	0.090
BROWNS FERRY WATER CO	0.345	0.130
PLANTERSVILLE, TOWN OF	0.190	0.110
SAMPIT SYSTEM	0.162	0.021
WEDGEFIELD PLANTATION	101.000	0.098
RED HILL GCWSD	0.101	0.028
ROSE HILL GCWSD	0.072	0.020
WACCAMAW NECK	2.475	1.925
GARDEN CITY POINT	0.787	0.452
NORTH SANTEE/GCWSD	0.422	0.040**
COUNTY TOTAL	114.858	6.345

NOTE: EMERGENCY CAPACITY (MGD)

*0.455

**0.211

0.666 TOTAL

SOURCE: DHEC 2/12/90

GEORGETOWN COUNTY SEWER SYSTEMS

	<u>DESIGN FLOW</u>	<u>PERMIT FLOW</u>	<u>MONTHLY AVG.</u>	<u>DAILY MAX.</u>	<u>REMAIN FLOW</u>
ANDREWS	2.2000	.950	.740	.800	1.250
HARMONY HILLS MHP *	.0380	.022	.025	.025	.015
MURRELLS INLET *	.7500	.008	.000	.000	.747
GEORGETOWN	3.2600	2.788	3.230	4.410	.004
LITCHFIELD PLT. *	.0200	.018	.002	.002	.004
WEDGEFIELD PLT. *	.4000	.113	.041	.051	.287

*SYSTEM OF GCW&SD

SOURCE: SCIP 5/23/91

PUBLIC EDUCATION

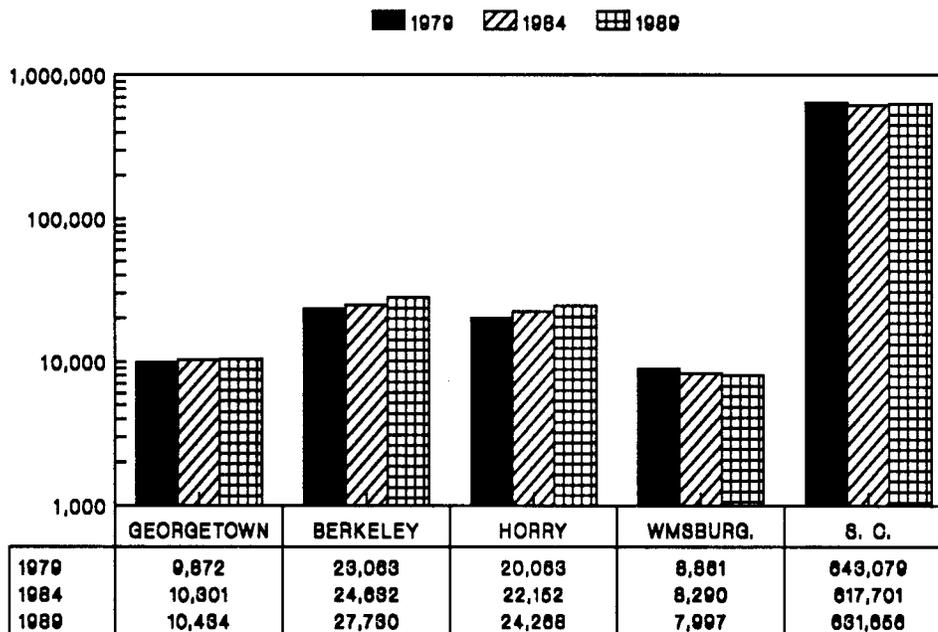
As noted below, Georgetown County schools had the next to highest increase in thirty-five day enrollment with a 128.4% increase. Horry County schools had the highest percent of increase with 129.8%. Also, Georgetown County was well above the state average increase of 110.1%

Thirty-Five Day Enrollment Comparison of Georgetown County, Surrounding Counties and S. C. 1979, 1984 and 1989

<u>District</u>	<u>1979</u>	<u>1984</u>	<u>1989</u>	<u>Percent Change 1979 - 1989</u>
Georgetown	1,377	2,065	3,145	+ 128.4%
Berkeley	1,326	1,972	2,712	+ 104.5%
Horry	1,381	1,945	3,173	+ 129.8%
Williamsburg	1,492	1,971	3,171	+ 112.5%
S. C.	1,452	2,057	3,051	+ 110.1%

Source: Rankings...1978-79, 1983-84, 1988-89

Thirty-Five Day Enrollment Comparison Georgetown and Surrounding Counties 1979, 1984 and 1989



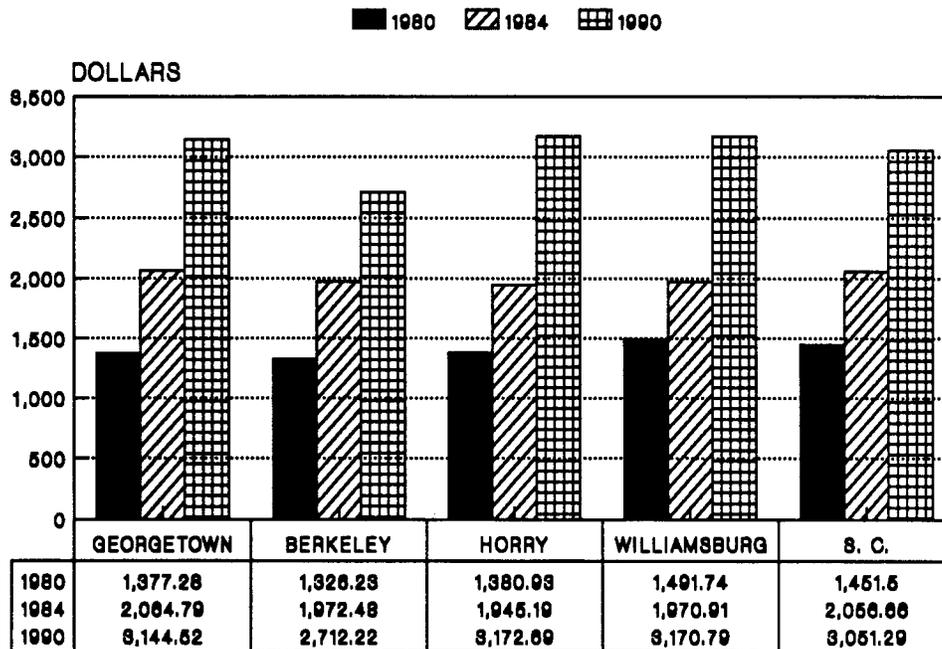
SOURCE: RANKINGS..1978-79,83-84,88-89

Georgetown County's school district exceeded the state's average increase in per pupil expenditures from 1979 to 1989. Georgetown County increased from \$1,377.28 to \$3,144.52 or 128.4%. South Carolina increased from \$1,451.50 to \$3,170.79 or 110.1%. Horry County's school district had the highest increase from \$1,380.93 to \$3,172.67 or 129.8%. Following is detailed information of these expenditures.

**Per Pupil Expenditures (Excluding Adult Programs,
Community Services, Pupil Activities, Capital Outlay,
and Debt Service) for Georgetown, Surrounding Counties
and the State 1979-80, 1983-84 and 1989-90**

<u>District</u>	<u>1979-80</u>	<u>1983-84</u>	<u>1989-90</u>	<u>Percent Increase</u>
Georgetown	\$1,377.28	\$2,064.79	\$3,144.52	+ 128.4%
Berkeley	\$1,326.23	\$1,972.43	\$2,712.22	+ 104.5%
Horry	\$1,380.93	\$1,945.19	\$3,173.67	+ 129.8%
Williamsburg	\$1,491.74	\$1,970.91	\$3,171.79	+ 112.5%
S. C.	\$1,451.50	\$1,056.66	\$3,051.29	+ 110.1%

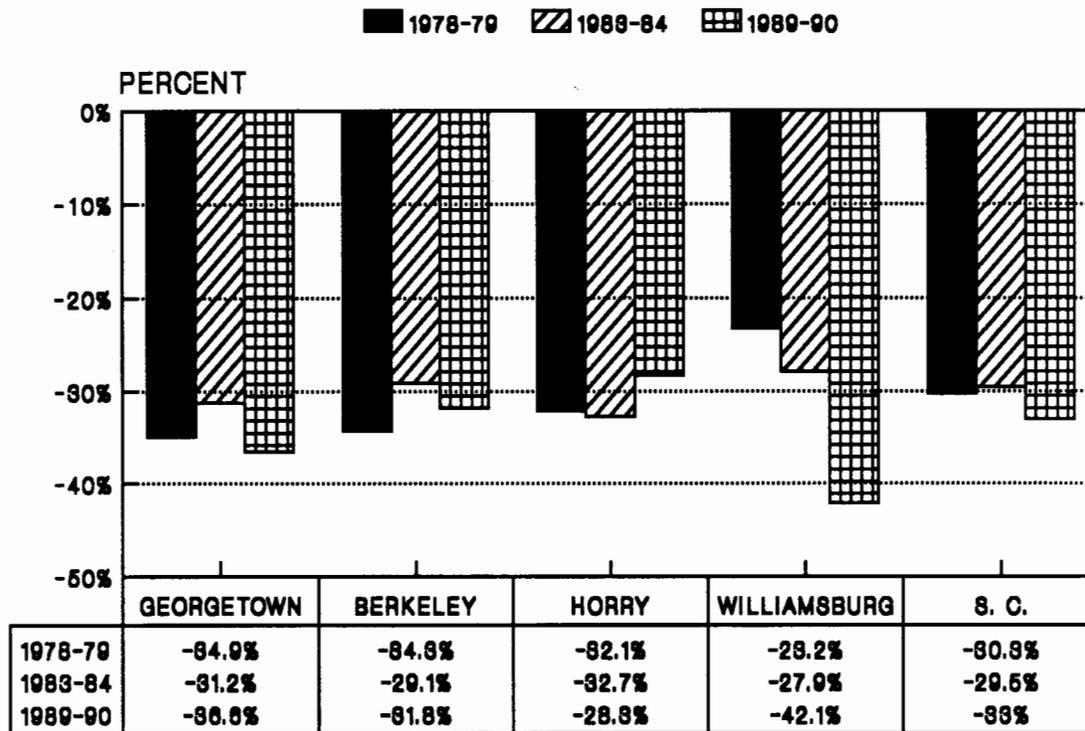
**PER PUPIL EXPENDITURES FOR GEORGETOWN
AND THE STATE 1979-80, 1983-84, AND
1989-90**



SOURCE: RANKINGS..1979-80,83-84,89-90

Overall, Georgetown County's school district lost 34.2% of its 9th to the 12th grade enrollment between the school years 1978-79 and 1989-90, the highest in the region. The state's overall average was 30.9%.

PERCENT CHANGE IN ENROLLMENT NINTH TO TWELFTH GRADES 1978-79, 1983-84 & 1989-90



SOURCE: RANKINGS..1978-79, 1983-84
& 1989-90

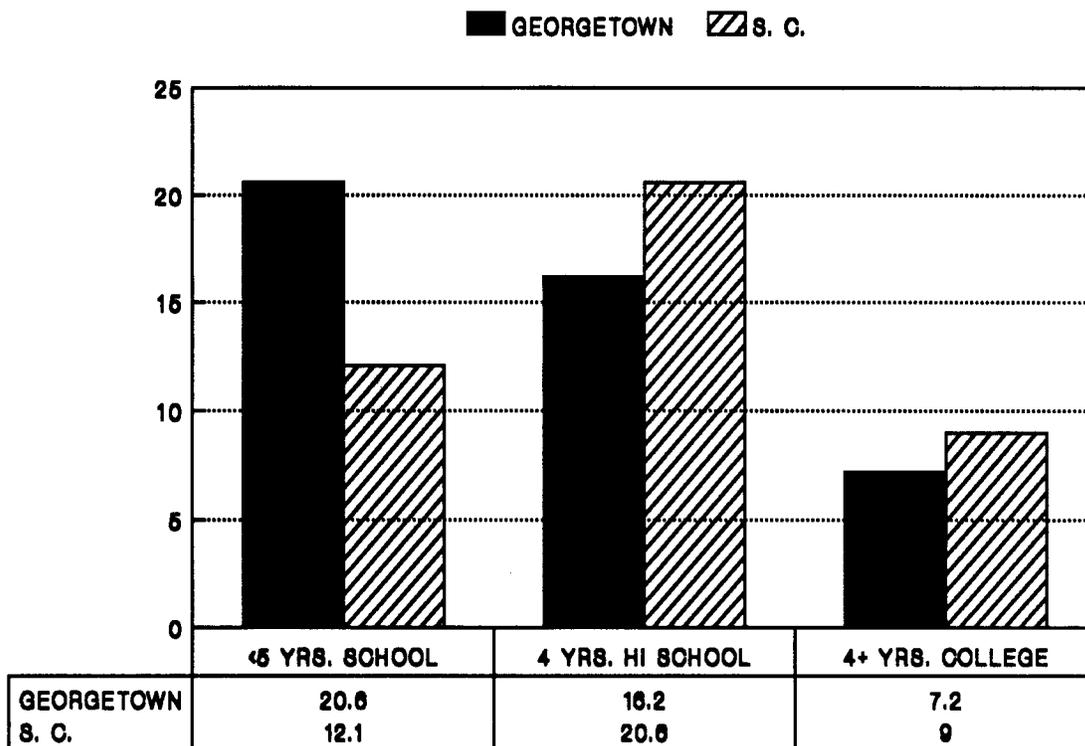
The educational level of Georgetown County's population increased dramatically from 1970 to 1980.

In 1970, over one-fifth of the county's population had less than a 5th grade education compared to the state's average of just over 12%. In 1980, 11.3% of the county population had less than a 5th grade education compared to the state's average of 7.1%.

In 1970, 16.2% of the county's population had completed at least 4 years of high school compared to the state's average of 20.6%. In 1980, the county had increased to 50.6% of its population having 4 years of high school compared to the state's average of 53.7%.

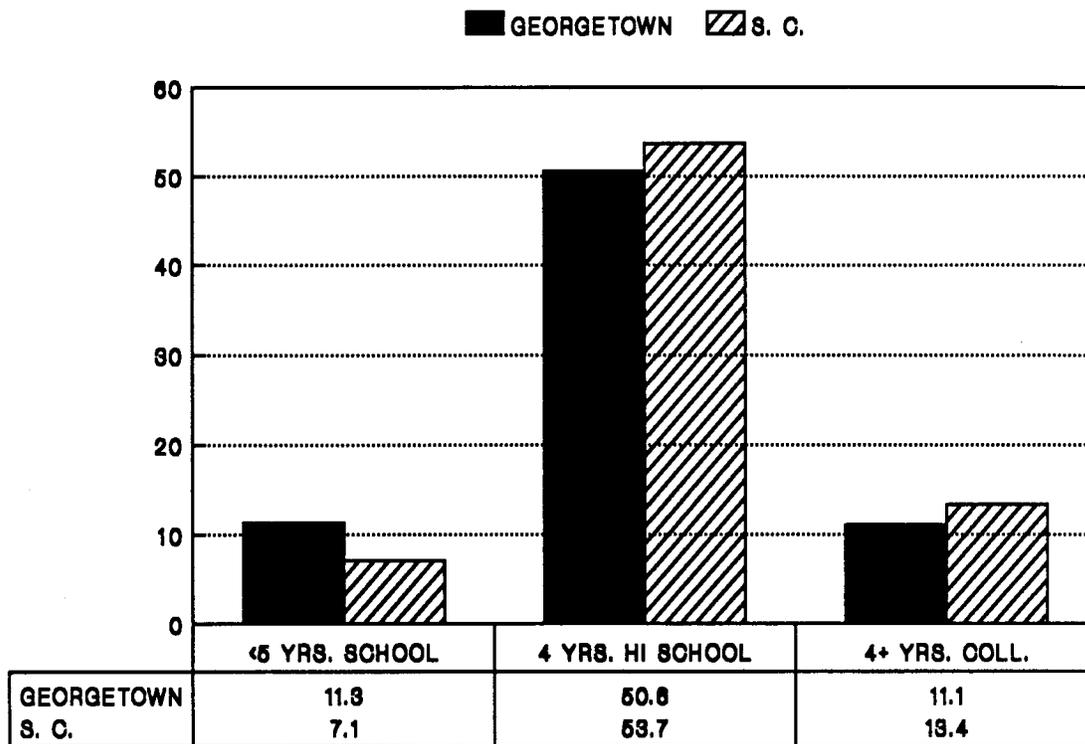
In 1970, Georgetown County had only 7.2% of its population with 4 or more years of college compared to South Carolina's 9.0%. In 1980, Georgetown County had 11.1% of its population with 4 or more years of college compared to South Carolina's 13.4%.

LEVEL OF EDUCATION AMONG GEORGETOWN COUNTY ADULTS AND S. C. 25 YRS. & OLDER - 1970



SOURCE: S. C. STATISTICAL ABSTRACT 1991

LEVEL OF EDUCATION AMONG GEORGETOWN COUNTY & S. C. ADULTS 25 YRS. & OLDER 1980



SOURCE: S. C. STATISTICAL ABSTRACT 1991