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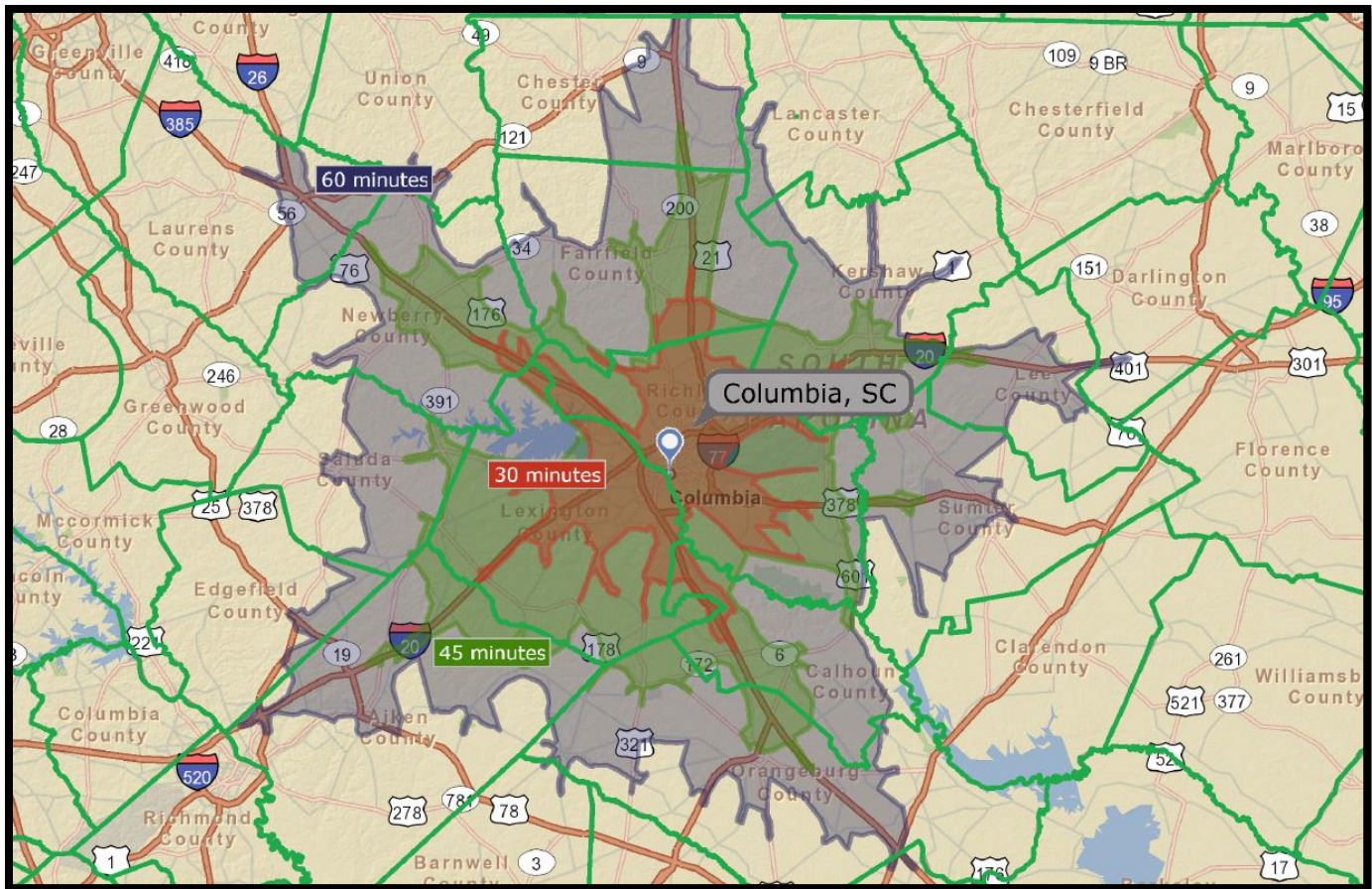
The Call Center Business Case for Central SC

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POPULATION DRAW

Central SC is home to the state's largest population



POPULATION

As the business, educational, and geographic center of the state, Central SC has a population draw on par with most large cities. Within a 60 minute drive, there are over 1.0 million people, and on any given day, over 207,000 people commute into and within the region. Between 2000 and 2010, the region has experienced an average annual growth rate of 1.44% and an explosive overall growth rate of 15.3%, far exceeding the national growth rate for the same period. The many attributes that make Central SC great for business, also make it great living.

TABLE 1: 2012 POPULATION BY DRIVE TIME

	30 minute	45 minute	60 minute
Population	540,246	751,115	1,026,259
Households	209,892	288,344	393,360
Families	129,231	184,539	256,024
Median Age	34.3	35.1	36.1
Age 25+ with an Associate's Degree	8.2%	8.2%	8.2%
Age 25+ with a Bachelor's Degree	21.2%	19.1%	17.3%
Age 25+ with a Master's Degree	9.2%	8.1%	7.3%

Source: ESRI Business Analyst Online Demographics and Income and ACS Population Summary Reports.

LABOR FORCE

Central SC has a highly skilled and dedicated workforce that keeps companies productive

WORKFORCE CHARACTERISTICS

Central SC is home to the state's largest workforce and is one of the region's strongest assets. The area's centers of higher education, including: four technical colleges, six independent senior colleges, and a nationally ranked research university continually provide the region with a highly skilled workforce.

TABLE 2: UNEMPLOYMENT

	Central SC
Labor Force (Mar. 2012)	444,643
Unemployment Rate (Mar. 2012)	8.17%
Employment (Mar. 2012)	408,230
Unemployed (Mar. 2012)	36,312

Source: US Census Bureau and the US Bureau of Labor Statistics.

Thanks to the region's low cost of living, workforce costs have remained well below the national average. See table 3 below for wages by occupation. Wages for Customer Service & related occupations in Columbia, SC are—on average—11% **lower** than the same occupations at the national level.

TABLE 3: MEAN HOURLY WAGE RATES

Occupation Title	Columbia, SC MSA	US
Market Research Analysts and Marketing Specialists	\$24.14	\$32.39
Business Operations Specialists, All Other	\$31.17	\$33.90
Sales Representatives, Services, All Other	\$23.67	\$29.22
Telemarketers	\$10.40	\$12.29
Switchboard Operators, Including Answering Service	\$12.84	\$12.91
Bill and Account Collectors	\$14.19	\$16.50
Customer Service Representatives	\$15.05	\$15.92
New Accounts Clerks	\$14.83	\$15.84
Information and Record Clerks, All Other	\$19.34	\$18.15
Data Entry Keyers	\$13.62	\$14.05
Average	\$17.93	\$20.12

Source: The Bureau of Labor Statistics May 2012 Occupational Employment Survey by Metropolitan Area.

Wages above do not include fringe benefits. According to the National Compensation Survey's Employer Costs for Employee Compensation for the Regions—March 2013, Fringe Benefits in the South Atlantic Division account for 27.8% of total wages, the lowest of all Census designated Regions and Divisions. The South Atlantic Division includes: Delaware, D.C., Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia.

In addition to the unemployed labor force, there are a number of workers (employed and unemployed) actively searching for occupations that match the skill set required for those occupations. The table below lists registered potential candidates actively seeking employment in each respective occupational field listed. The list is not all inclusive; it only lists those workers seeking employment through the state workforce system.

TABLE 4: WORKFORCE AVAILABILITY BY OCCUPATION

Occupation Title	Available & Looking	+10 Years of Experience	Currently Employed
Market Research Analysts and Marketing Specialists	66	37.50%	940
Business Operations Specialists, All Other	953	61.65%	960
Sales Representatives, Services, All Other	925	47.04%	850
Telemarketers	124	31.51%	170
Switchboard Operators, Including Answering Service	25	53.33%	290
Bill and Account Collectors	355	53.70%	880
Customer Service Representatives	5,863	47.15%	9,620
New Accounts Clerks	14	30%	70
Information and Record Clerks, All Other	43	71.43%	470
Data Entry Keyers	490	53.97%	1,000
Total / Average	8,858	48.73%	15,250

Source: The SC Works Online Services, individuals with active resumes in the workforce system in South Carolina as of 4/23/2013. The Bureau of Labor Statistics May 2012 Occupational Employment Survey by MSA.

HIGHER EDUCATION

The Columbia area boasts more institutions of higher education than any other region in the state. These institutions range from a large, public research institution with graduate programs in law and medicine to a small liberal-arts women’s college. Also available are two historically African-American institutions, a nationally renowned technical college system, two seminaries, and a junior college of business with an ABA approved Paralegal Studies Program.

THE UNIVERSITY OF SOUTH CAROLINA

The state’s premier research university’s main campus—located in the heart of Central SC—is home to more than 200 years of history and tradition, rising from a single building in 1805 on what would become the center of the campus, the Horseshoe. The University of South Carolina awards over 300 degrees in engineering and 1,400 degrees in business each year. Furthermore, the University’s Moore School of Business, has received the number one ranking for its International Masters in Business Administration for 22 consecutive years by U.S. News and World Report.

MIDLANDS TECHNICAL COLLEGE

One of the region’s most regarded technical colleges has seven different locations throughout the region, providing scores of workers with quality training and education. Midlands Technical College offers approximately 100 degree, diploma and certificates in career programs and arts and sciences. Last year, Midlands Technical College provided training for more than 100 area business and industries.

Midlands Tech offers a Customer Service Certificate to support the region’s Call Center / Shared Services Industry. The program provides education competencies necessary for entry-level and professional employment in the numerous multi-dimensional careers in customer service.

CENTRAL SC REGION

The region’s other institutions of higher education include: Central Carolina Technical College, Orangeburg/Calhoun Technical College, Piedmont Technical College, Claflin University, Morris College, SC State University, and Newberry College. Combined, these institutions of higher education enroll approximately **72,000 students** annually and more than **13,000 students** graduate each year with a bachelor’s degree, associate’s degree, or certification.

MILITARY PRESENCE

Home of the Army's Largest Initial Training Base

Fort Jackson Army Base, McEntire Air National Guard Base, and Shaw Air Force Base are located within the Central SC Region

FORT JACKSON

As the U.S. Army's main production center for Basic Combat Training, Fort Jackson trains 50 percent of the Army's Basic Combat Training load and 60 percent of the women entering the Army each year.

The post has other missions as well. Fort Jackson is home to the U.S. Army Soldier Support Institute, the Armed Forces Army Chaplaincy Center and School and the National Center for Credibility Assessment (formerly the Department of Defense Polygraph Institute). It also is home to the Army's Drill Sergeant School, which trains all active and Reserve instructors.

The fort includes more than 52,000 acres, with more than 100 ranges and field training sites and 1,160 buildings. Soldiers, civilians, retirees and family members make up the Fort Jackson community. More than 3,500 active duty Soldiers and their 12,000 family members are assigned to the installation and make this area their home. About one third of those Soldiers and families live in on-post housing. The base transitions approximately 50 – 70 soldiers exiting the military seeking new employment each month.

MCENTIRE AIR NATIONAL GUARD BASE

McEntire Air National Guard Station (ANGS) is located approximately 16 miles southwest of Columbia, South Carolina. The 2,400-acre base is owned by the US Government and is operated by the South Carolina Air National Guard. McEntire ANGS owns 2,344 acres and leases approximately 64 acres from the State of South Carolina. Additionally, there is a small parcel of privately owned land within the base boundary; however, neither the leased land nor the privately owned land contains utilities.

The South Carolina Air National Guard was formed in December 1946 and today is made up of 1,300 members who train at McEntire ANG Station. The base is home to the 169th Fighter Wing, which flies the F-16 multi-role fighter. An Army National Guard aviation unit is also a tenant on the base.

The base has a total 95 buildings: 90 industrial, 4 administrative and one services totaling 263,000 square feet. There is no family or transient housing. New facilities under construction include an addition to the avionics building (2,500 square feet) and replacement of the air traffic control tower and aircraft support equipment facility (14,600 square feet total). Additionally, seven facilities totaling approximately 21,000 square feet were demolished in FY 2001. There are 550 full-time ANG personnel on base which increases to 1,300 one weekend per month. Additionally, there is a small cadre of Army personnel on base, increasing to 400 every other weekend.

SHAW AIR FORCE BASE

Shaw Air Force Base is home to the Air Force's largest F-16 combat wing and serves as the US Ninth Air Force HQ, US Air Forces Central Command and US Third Army HQ. The Ninth Air Force is responsible for ensuring the agile combat support capabilities of eight wings and three direct reporting units. These units encompass more than 400 aircraft, and 29,000 active-duty and civilian personnel. The Ninth Air Force is also responsible for the operational readiness of 16 9th-Air-Force-gained National Guard and Air Force Reserve units.

EXISTING INDUSTRY

The Call Centers, Shared Service Centers, and Back-Office operations that call Central SC home.

Central SC is—among other things—the ideal place for Call Centers and other Back-Office operations. The companies listed below are leaders in their respective industries, and have operations in Central SC. The region’s business climate, workforce and low cost of living all contribute to their continued success.

TABLE 5: EXISTING CALL CENTERS AND RELATED COMPANIES

Company Name	Employees	Function
Blue Cross & Blue Shield of SC ¹	6,459	Insurance Services, Contact Center, Claims Processing etc.
AT&T	2,400	Telecommunication
Verizon ²	1,500	Customer Service Center for Telecommunications
Computer Science Corporation (CSC)	1,345	Insurance Software Developer
Colonial Life & Accident Insurance ³	1,032	Insurance Services, Claims Processing
Wells Fargo Customer Connection ⁴	850	Customer service call center
Teleperformance ⁵	680	Customer & Technical Support
General Information Services (GIS)	583	Employee Background Checks
Aflac	521	Insurance Services, Claims Processing
DHL Global Forwarding	500	Customs Brokerage and Entry Processing
Staples	400	Shared Services
PriceWaterHouseCoopers	400	IT, Data Processing and Admin
Time Warner Cable ⁶	352	Customer service center, digital cable & high-speed data services
Aetna	320	Insurance Services, Claims Processing
Trumbull Services LLC	300	Insurance software solutions
South Carolina Farm Bureau State ⁷	200	Fire, marine, & agricultural insurance, call center operations
TM Floyd	180	Information Technology Consulting
Document Systems Inc.	16	Information Retrieval Services
WNS Holdings ⁸	10	Business Process Outsourcing
Mid Carolina Electric	9	Customer Service Center for Utility Company
Mid Carolina Electric	7	Customer Service Center for Utility Company

Source: Central SC Records.

¹ Approximately 1,204 of these employees are customer service employees.

² Their Columbia Call Center, is the company’s largest and operates 24/7.

³ 80 – 100 of Colonial Life’s employees at this location are customer service employees, depending on the time of year.

⁴ 350 of Wells Fargo’s employees at this location are customer connection staff, the remaining 500 are support staff.

⁵ Teleperformance provides customer service for DirectTV.

⁶ Approximately 200 of these employees are customer service employees.

⁷ Began operations in 1999, includes 11 full time customer service representatives and 6 back-up representatives.

⁸ In May of 2012, WNS Holdings announced plans to hire up to 750 workers.

QUALITY OF LIFE

In Central SC, you get more than just a great place to work, you get lifestyle that is truly outstanding

Opportunities are abundant with outdoor recreation, museums, horse races, college and professional sports, famous golf courses—you name it, and Central South Carolina has it, all at a cost of living well below the national average.

TABLE 6: COST OF LIVING

Urban Area & State	100% Composite Index
Columbia, SC	91.8
Los Angeles / Long Beach, CA	131.3
Denver, CO	105.1
Miami-Dade County, FL	108.1
Chicago, IL	118.6
Minneapolis, MN	110.8
Chapel Hill, NC	110.2
Richmond, VA	100.6
Seattle, WA	116.2

Source: C2ER Accra Cost of Living Index, 3rd Quarter 2012 data.

Central SC is the epicenter of all scenic attractions within the state; the Blue Ridge Mountains are a short drive to the northwest, while 187 miles of Atlantic Ocean coastline lie to the east. Lakes, rivers, estuaries and national and state forests crisscross the region providing residents with a plethora of scenic attractions to choose from.

History, arts and culture are not lost in Central SC; there are nearly a dozen museums, landmarks of historical significance, festivals, theatres and musical venues to choose from. The Midlands region is also home to a number of popular festivals including: the Rosewood Crawfish Festival, Newberry Oktoberfest, the S.C. State Fair, Greek Festival, and the Festival of Roses.

The region has the sporting venues to satisfy the biggest sports fanatic. The University of South Carolina's sports are absolutely exhilarating; the Gamecock baseball team was crowned the 2010 and 2011 College World Series Champion and the Gamecock Football team won the SEC East Championship. The Benedict Tigers, S.C. State Bulldogs, and the Newberry Indians also offer outstanding sporting venues. Furthermore, thanks to the region's mild climate, golf can be enjoyed year round, at any one of the nearby five courses on Golf Digest's "100 Greatest Courses."

When it comes to quality of life, Central SC is second to none. The quality of life amenities, the recreational opportunities, the sporting events, the museums, the festivals and the scenic landscapes all contribute to why living in the Midlands, is experiencing life at its finest.

CONCLUSION

When comparing states, regions and/or cities for potential business relocation, there are a number of factors to consider. The Central SC Region has the workforce, education system and cluster of existing companies to support the customer service industry. Central SC not only has a highly skilled and available workforce, it has the highly skilled available workforce that Customer Service Centers need. In today's challenging economy, it is more important than ever for businesses to make the best strategic decisions to guarantee a successful future. Whether it's the region's skilled workforce, low cost of business, favorable tax and regulatory environment or high quality of life, **Central SC is a place where your business can thrive.**