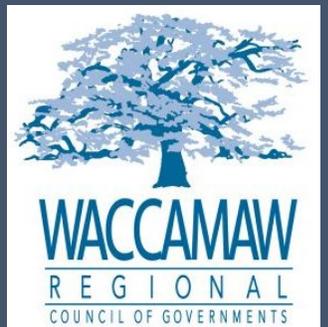
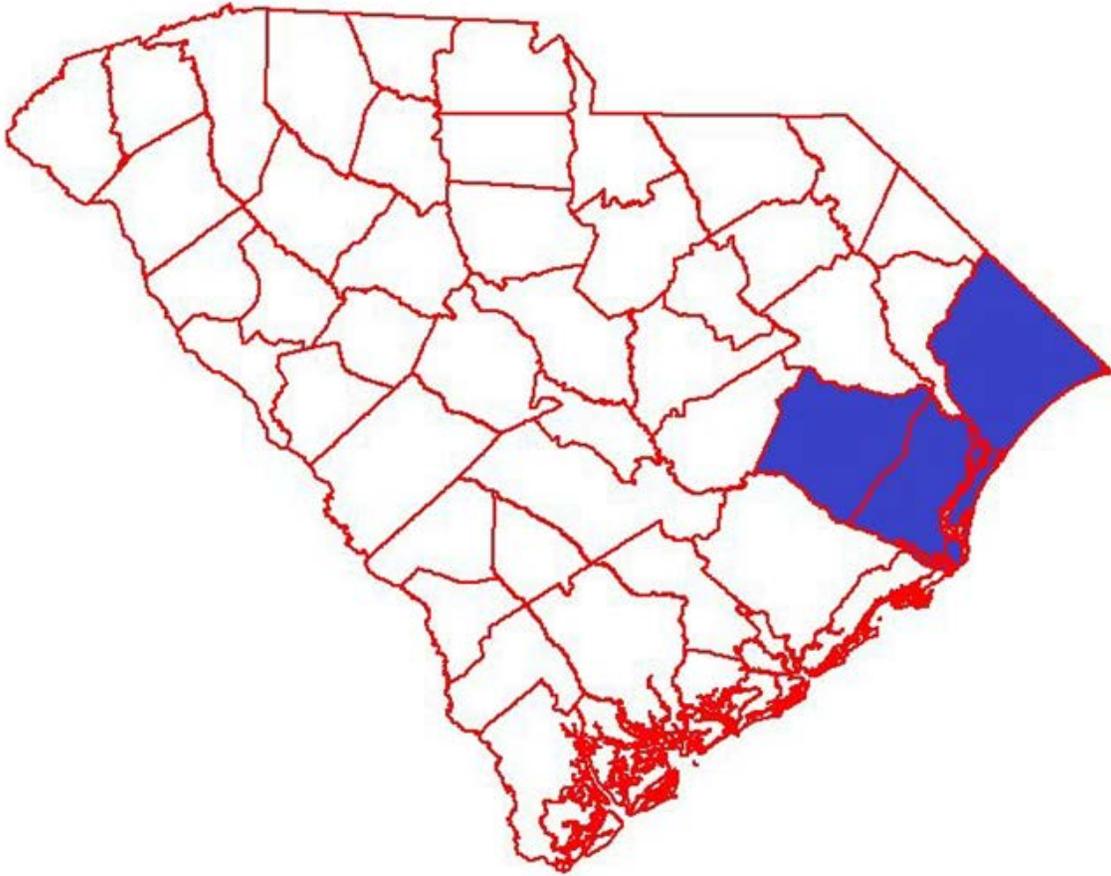

Comprehensive Economic Development Strategy for the Waccamaw Region Draft

Prepared by: Waccamaw Economic Development District and
Waccamaw Regional Council of Governments





Waccamaw Region Comprehensive Economic Development Strategy

2017-2022, September 2017

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Comprehensive Economic Development Strategy for the Waccamaw Region

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Comprehensive Economic Development Strategy for the Waccamaw Region



EDA
U.S. ECONOMIC DEVELOPMENT ADMINISTRATION



Chapter I
Executive Summary

Georgetown County • Horry County • Williamsburg County

EXECUTIVE SUMMARY



“The Comprehensive Economic Development Strategy’s mission is to work with key players to develop a plan that stimulates regional innovation and competitiveness and results in a resilient economy that leverages private investment and creates jobs.”

– Sarah Smith, Executive Director WRCOG

A Comprehensive Economic Development Strategy (CEDS) is designed to guide regional economic growth. This planning process and subsequent report provide strategies for job creation, diversified economies, and aim to increase the quality of life. In addition, CEDS promotes collaboration and coordination between the various individuals and groups, both public and private, engaged in economic development. A CEDS is the result of a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area.

The development and adoption of a CEDS is a requirement to qualify for Economic Development Administration (EDA) assistance in public works, economic adjustment, and other planning programs. Additionally, an adopted CEDS is a prerequisite for the EDA’s designation as an area Economic Development District (EDD). All EDD’s must address resilience in their CEDS utilizing a two-pronged approach (steady-state and responsive initiatives) to help identify and counter the vulnerabilities that each region may face.

CEDS has been an integral part of economic development planning in the Waccamaw Region for the last four decades. Starting in the 1970’s, the Waccamaw Regional Council of Governments (WRCOG) has facilitated, through its Board of Directors and the CEDS Strategy Committee, the annual review and five year CEDS rewrite. The *Comprehensive Economic Development Strategy for the Waccamaw Region, 2017-2022* replaces the region’s 2012 CEDS. This plan is designed not only to meet federal CEDS requirements but also to provide meaningful guidance to policy makers in economic development decisions affecting the region over the next several years.

Comprehensive Economic Development Strategy for the Waccamaw Region



Georgetown County • Horry County • Williamsburg County

BACKGROUND

PLANNING PROCESS PARTICIPANTS

The development of this plan involved a diverse group of stakeholders and participants including WRCOG, the CEDS Strategy Committee, and regional partners:

WRCOG

Created in 1969, the Waccamaw Regional Council of Governments (WRCOG) is one of South Carolina's ten regional planning agencies known as COGs. WRCOG serves Georgetown, Horry, and Williamsburg counties, including the counties' sixteen municipalities. A twenty-five member Board of Directors oversees the agency's budget, appoints an executive director, and serves as the agency's policy making body. The board is appointed by the legislative delegations from the three counties and includes a mixture of public and private sector residents. A list of the WRCOG's Board of Directors can be found in appendix B.

As part of its core mission, WRCOG provides in-depth assistance to local governments and serves as the technical planning staff for a few planning and zoning commissions, assists in securing and administering grant funds for local projects and services, and coordinates varied social service programs geared toward the elderly and economically disadvantaged. Through its workforce development program, WRCOG maintains, in coordination with the SC Department of Employment and Workforce, the area's three SC Works centers.

The Waccamaw Region was designated as an Economic Development District (EDD) by the United States Department of Commerce's Economic Development Administration (EDA) in 1970. For the past forty years, WRCOG has partnered with EDA as the Regional EDD promoting economic development in the region. Through its community and economic development department, WRCOG assists in the administration of programs and activities related to the area's Economic Development District designation. A major part of this responsibility is to provide staff support in the periodic update or rewrite of the CEDS.

CEDS Strategy Committee

The CEDS Strategy Committee is responsible for developing and updating the economic development planning and implementation process for WRCOG. The CEDS committee is the region's Workforce Development Board, due to its composition of a diverse group of business leaders, educators, economic developers, and community leaders. The list of CEDS Strategy Committee members, their occupation, and the county each represents is located in appendix C.



Partnerships

WRCOG and the CEDS Strategy Committee recognize the necessity of building partnerships with local, regional, and state entities in order to foster economic development planning efforts both locally and regionally. Partners include the South Carolina Department of Commerce, Myrtle Beach Regional Economic Development Corporation, Williamsburg County Development Board, Georgetown County Economic Development Commission, North Eastern Strategic Alliance (NESAs), Waccamaw Region Workforce Development Board (WDB), South Carolina Department of Employment and Workforce, Georgetown County Water and Sewer District, Santee Electric Co-Op, Horry Electric Co-Op, Santee Cooper, Williamsburg County Technical College, Horry-Georgetown Technical College, Ready SC, Grand Strand Area Transportation Study, Grand Strand Water and Sewer Authority, North Myrtle Beach Water and Sewer, Williamsburg County Water and Sewer Authority, the three school districts in the region, Coastal Carolina University and all local Chambers of Commerce.

THE PLANNING PROCESS

The process used to develop the *Comprehensive Economic Development Strategy for the Waccamaw Region, 2017-2022* can be best described as an ongoing and continuous effort. Following the development of the region's 2012 plan, annual reviews and updates were performed in accordance with federal guidance. These annual reviews ensured that relevant base data and analysis were collected and performed well in advance of the 2017 CEDS rewrite. This updated data and analysis were periodically reported to the CEDS Strategy Committee.



Figure 1 illustrates the process used in this plan's development. An important part of this activity included the involvement of public and private representatives as well as afforded a meaningful opportunity for citizen comment. The CEDS Strategy Committee completed their work on the updated plan on August 14, 2017. The Board of Directors took the plan under advisement at their meeting and commenced an advertised thirty-day public comment period (see Appendix A). At the October 9, 2017 meeting, WRCOG's Board of Directors approved the CEDS and authorized its submission to the US Department of Commerce's Economic Development Administration.



REGIONAL OVERVIEW

The Waccamaw Region is located in the northeastern coastal area of the state of South Carolina and includes Georgetown, Horry, and Williamsburg counties. The region consists of approximately 2,901 square miles and is bound to the north by the North Carolina state line; the Atlantic Ocean to the east; the Santee River which borders Berkeley and Charleston counties to the south; and Clarendon, Florence, Marion, and Dillon counties to the west. Myrtle Beach, located in Horry County, is the most populous metropolitan statistical area in the region and the 4th largest in the state. Myrtle Beach is located approximately 125 miles from Columbia, the state capital, and 315 miles east of Atlanta, Georgia. The Myrtle Beach Metropolitan Statistical Area (MSA) is one of ten MSA's in the state. The MSA includes all of Horry County, which is 1,255 square miles and has a density of 257 people per square mile. In terms of land mass, Horry County is the largest county in the state. Williamsburg, by contrast, is very rural. With 937 square miles, Williamsburg County has a density of only 34 people per square mile. Georgetown County, which spans 814 square miles, has a population density of 75 people per square mile.

POPULATION CHARACTERISTICS

Total Population

In 2010, the population of the three county region was 363,872. This represented an increase of twenty-six percent over the year 2000 population total of 289,643 residents. Horry County saw an increase in its population of 72,662, while Georgetown County grew by 4,361 residents. Williamsburg County experienced a decrease of 2,794 residents, falling from a population of 37,217 (2000) to 34,423 (2010). *Figure 2* provides a comparison of population growth over the past forty years:

County or Area	1980	1990	2000	2010	2016	6-Year % Change
Georgetown	42,461	46,302	55,797	60,158	61,399	2.1%
Horry	101,419	144,503	196,629	269,291	322,342	19.7%
Williamsburg	38,226	36,815	37,217	34,423	31,955	-7.2%
Waccamaw Region	182,106	227,170	289,643	363,872	415,696	14.2%
South Carolina	3,122,814	3,486,703	4,012,012	4,625,364	4,961,119	7.3%

Source: United States Census Bureau, STF-1 datum, 1970-2010, ACS Estimates 2016

Chapter II. Background

Since 1980, the region's population has grown at a rate approximately twice that of the state (Waccamaw Region – 128.3%, South Carolina – 58.9%). Horry County experienced a growth rate of 217.8% over this time period. Georgetown County grew at a rate slightly below the state's, with a growth percentage of 44.6%. By contrast, Williamsburg County's growth was negative with a population decrease of 16.4%.

The area includes sixteen municipalities. Population change within the area's cities and towns including the 2016 estimates are provided in *Figure 3*:

Figure 3: Population Change for Regional Municipalities 1990-2010				
City/Town	2000	2010	2016	16-Year Growth
Andrews	3,068	2,861	2,896	-5.6
Atlantic Beach	351	334	402	14.5
Aynor	587	560	763	29.9
Briarcliff Acres	470	457	551	17.2
Conway		17,103	22,76	93.1
Georgetown	8,950	9,163	9,024	.8
Greeleyville	452	438	404	-10.6
Hemingway	573	459	426	-25.7
Kingstree	3,496	3,328	3,221	-7.9
Lane	585	508	470	-19.7
Loris	2,079	2,396	2,651	27.5
Myrtle Beach	22,759	27,109	32,24	41.7
North Myrtle Beach		13,752	16,03	46.1
Pawleys Island	138	103	107	-22.5
Stuckey	263	245	231	-12.2
Surfside Beach	4,425	3,837	4,391	-.7

Source: United States Census Bureau, STF-1 datum, 1970-2010, ACS

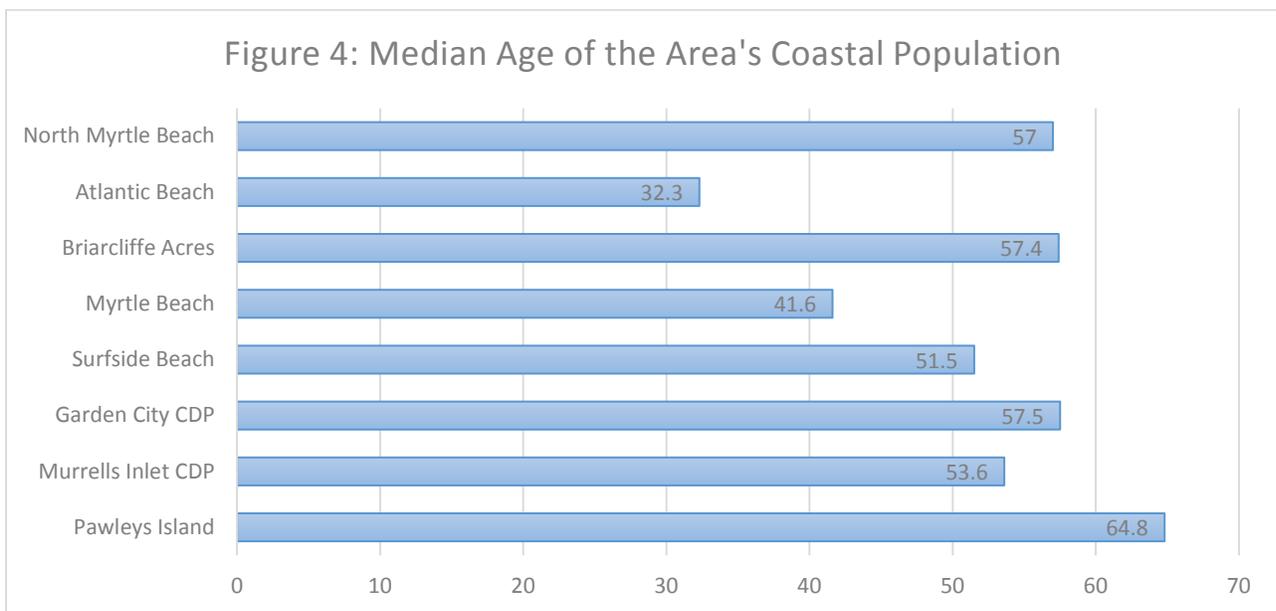
Eight of the region's fifteen municipalities lost population between 1990 and 2016, including all municipalities in Georgetown and Williamsburg Counties besides the City of Georgetown, which only grew by .8%.



Age and Gender

In 2015, females constituted the majority of area residents outnumbering males by approximately 15,000. The percentage of the respective genders has remained fairly stable in the region and is comparable to the state average.

The age of area residents has increased, reflective of trends at both the state and national level. The increase in median age is more pronounced in the coastal counties of Horry and Georgetown. In 2015, the median ages for these counties were 43.0 and 47.5 years respectively, exceeding both the state (38.6) and the national (37.6) averages. As illustrated in Figure 4, this higher median age can be attributed, in part, to the influence of retirees, many of whom reside in the area’s beachfront communities.

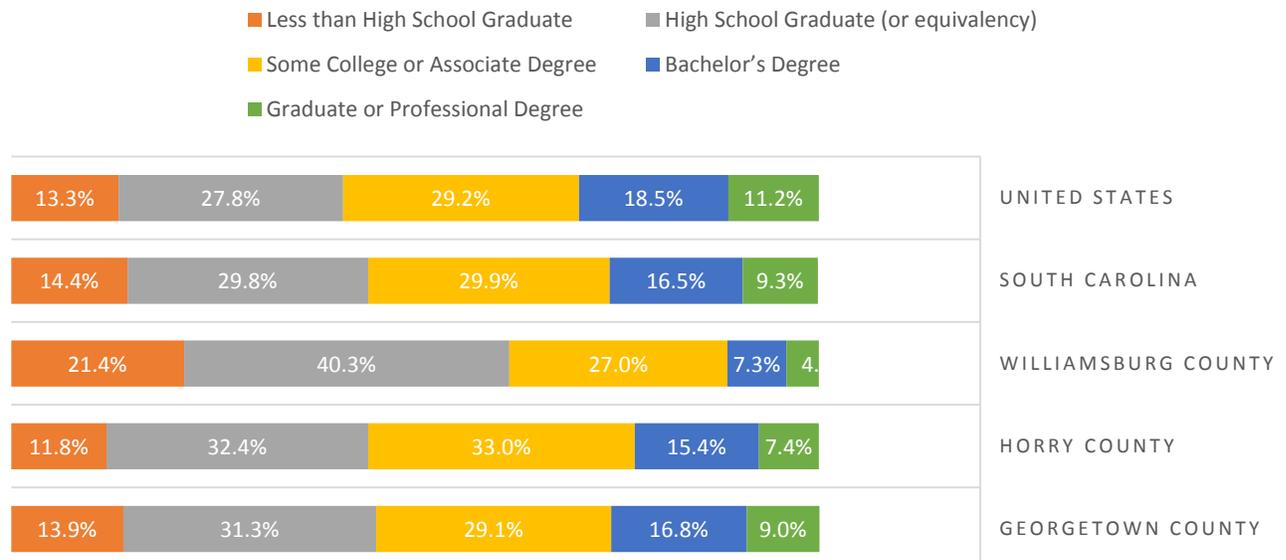


Educational Attainment

The region’s educational attainment has shown improvement since the 2000 Census based on the 2015 estimates from the American Community Survey. The region as a whole fared better than the state in the percentage of residents with a high school diploma. Of the three counties, Williamsburg County’s rate was the lowest at just over 78% of residents holding a high school diploma or greater; however it should be noted that Williamsburg County witnessed the biggest improvement, rising from 65.6% in 2000.

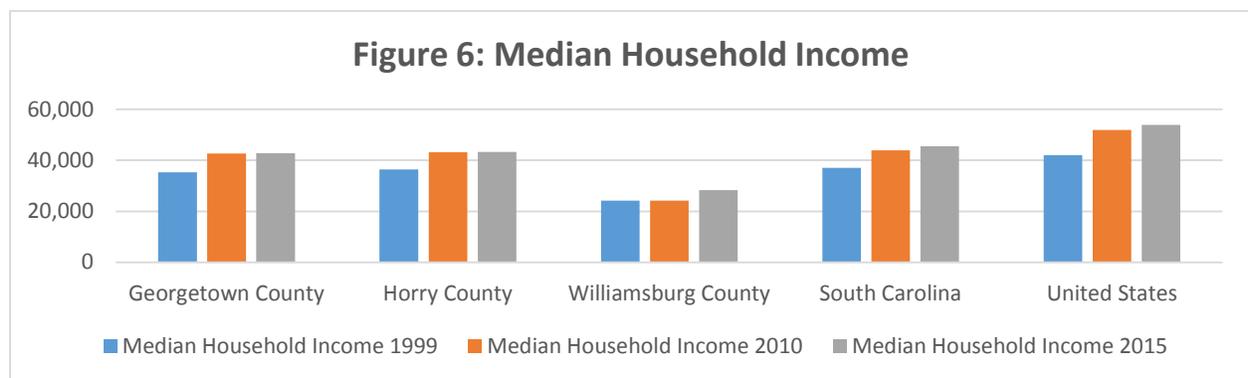
The percentage of persons with a four-year college degree or advanced degree was below both the state and national averages. Figure 5 provides a comparison of rates among the three counties as compared to the state and nation.

FIGURE 5: PERCENTAGE OF POPULATION BY EDUCATIONAL ATTAINMENT

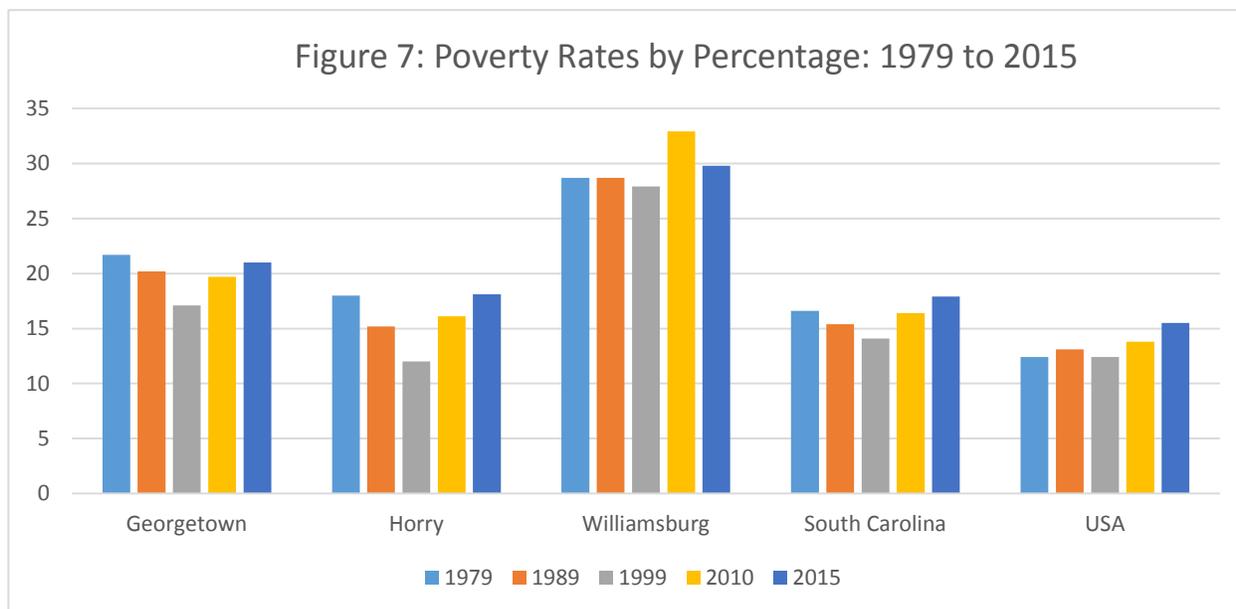


Median Incomes and Poverty

Median household and per capita income vary significantly across the region. Historically, income rates for Georgetown and Horry County have been at or just slightly below the state’s average, while Williamsburg has historically recorded incomes far below the regional and state average. The 2015 numbers show that this trend continues. The most recent American Community Survey data reported that median household and per capita incomes for Williamsburg County were approximately one-half the national average. *Figure 6* provides a comparison of median household incomes for the region’s three counties.



Source: US Census Bureau. Note: 2006-2010 American Community Survey, 2015 estimates

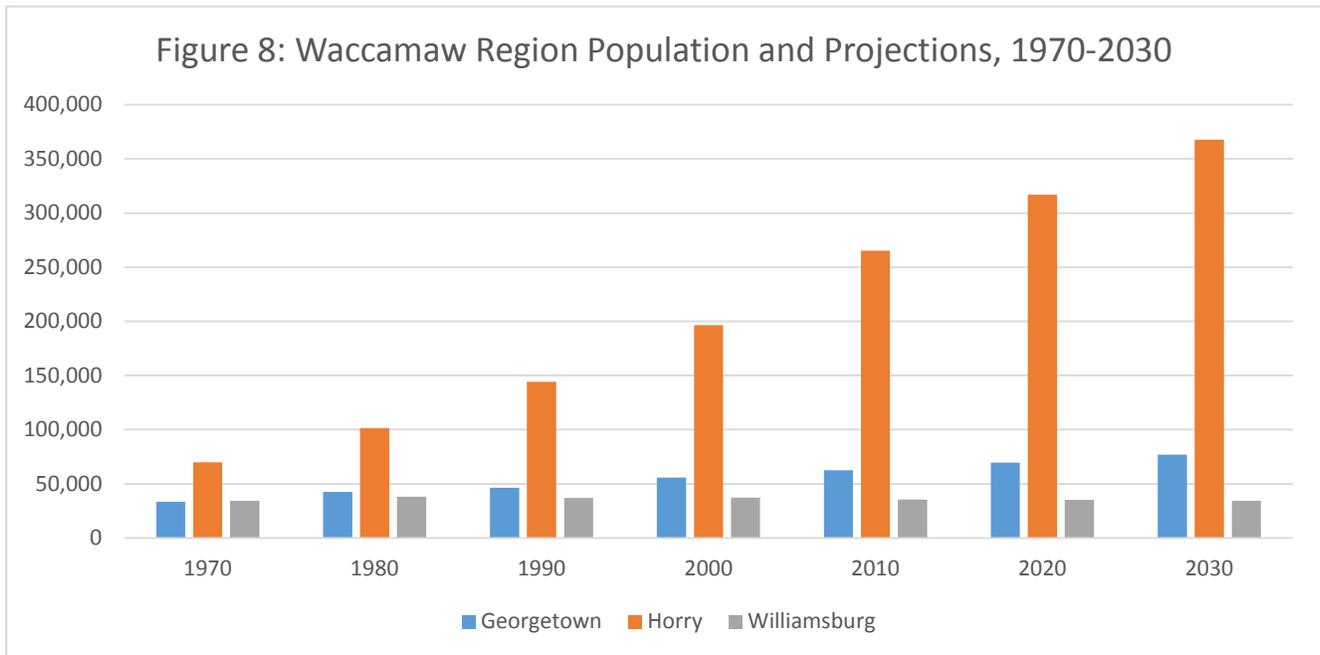


Source: US Census Bureau

Poverty results in a lack of basic necessities such as health care, good nutrition, education, and essential public services. These needs are different from, but related to, economic development needs. The American Community Survey from 2015 estimates that 19.7% of the region’s population lived in poverty. This is compared to 17.9% for the state of South Carolina and 15.5% for the nation for the same period. Of the population in the region living in poverty, Horry County had the lowest percentage (18.1%) and Williamsburg County had the highest percentage (29.8%). Williamsburg County is one of the twelve counties in South Carolina that is designated a “Persistent Poverty County” by the Economic Research Service. This means that poverty rates surpassed 20% in each of the last four censuses. However, it should be noted that Williamsburg’s percentage of poverty is down from 32% in 2012 and 29.8% in 2015, showing gradual improvement.

Population Projections

The Department of Administration periodically issues population projections for the state’s counties. Figure 8 illustrates the latest projections for the region’s three counties. According to the US Census Bureau’s 2015 estimates within twenty years, it is projected that the region’s population will grow to 469,700 with the majority of this growth occurring in Horry County. The projected regional growth rate of twenty-nine percent over the next twenty years far exceeds the projected growth for the state (17.9%). It is also projected that the rural, far inland portions of the region (western Georgetown and Williamsburg Counties) will continue to show no to declining population growth. *Figure 8* provides population projections to the year 2030:



Source: US Census Bureau via SC Department of Employment and Workforce

Housing

In 2015, the region had an estimated 240,252 housing units. This is a 5,229 increase from the total in 2010. The numbers from 2015 also show a 44.8% increase from the 2000 Census (165,919) and 93.2% increase from the 1990 Census (124,359). The region's housing stock has significantly outpaced population growth. This increase in housing units can be attributed to coastal tourism-based housing construction which has accelerated during the late 1990's and slowed with the financial crisis of 2008.

As a result, the area's housing stock is relatively new with almost half of the regions' housing construction coming after 1990. Obviously Horry County, home to Myrtle Beach, has seen the most significant spike in growth. 56.9% of the units were built after 1990 and 33.2% of construction has completed after 2000. Georgetown County has the second highest increase in housing stock with 48.7% of construction completed after 1990 and 23.5% completed after 2000. Williamsburg County, which has seen declining populations in some places, understandably has the lowest increase in housing stock. The rural county has seen 34.9% growth in housing stock since 1990 and 10.9% since 2000. Both Georgetown and Horry County have higher rates of housing stock compared to national averages. The United States as a whole has seen 30.5% growth since 1990 and 16.5% increase in housing construction since 2000.



As the housing market continues to bounce back the Waccamaw region will also continue to be an attractive destination for retirement and a smart play for those looking to invest in real estate as homes and apartments increase in value.

Figure 9: Housing Stock

Housing Type	Georgetown	Horry	Williamsburg	SC	US
Total Units	33,930	191,102	15,220	2,174,319	133,351,840
Single-Family	21,875 (64.5%)	96,047 (50.3%)	8,261 (54.3%)	1,422,031 (65.4%)	89,951,211 (67.4%)
Duplex	367 (1.1%)	3,112 (1.6%)	251 (1.6%)	47,719 (2.2%)	4,971,562 (3.7%)
Multi-Family	5,576 (16.4%)	65,050 (34.0%)	802 (5.3%)	340,559 (15.7%)	29,839,671 (22.4%)
Mobile Home	6,093 (18.0%)	26,771 (14.0%)	5,901 (38.8%)	362,682 (16.7%)	8,478,334 (6.4%)

US Census Bureau (2015 Estimates)

Median home values for the region's coastal counties have increased over the past few decades at a rate higher than the state average. The American Community Survey in 2015 estimated that median value of a home in Horry County was \$159,700, which was down from \$170,100 in 2010. The median value of homes in Georgetown also fell to \$159,600 in 2015, down from \$174,700 in 2010. Both Georgetown and Horry County median home values are above the state averages (\$134,100 in 2010 and \$139,900 in 2015). Williamsburg falls far behind in value with the estimated median home value of \$67,200 in 2010 and a value of \$68,300 in 2015. South Carolina as a whole averaged \$139,900 in 2015 and the United States is estimated to have a median house value of \$178,600.

The Waccamaw region was estimated to contain 45,379 occupied rental housing units in 2015. This is up from 42,059 occupied units in 2010. The percentage of overall occupied rental housing stock in the state and the regional fell below the national rate of 36.1%. The percentage of occupied rental housing units is 31.4% in South Carolina, 23.2% in Georgetown County, 31% in Horry County, and 26.5% in Williamsburg County. The gross median rent in the state and regional rent rates are lower than the national median rate of \$928. The median rent rate in South Carolina is \$790. While Williamsburg County is below that with a median rent of \$569, both Georgetown County and Horry County rent is over the state average with \$821 and \$843 respectively, according to the American Community Survey 2015 estimates.

The American Community Service 2015 estimates that 0.3% of the region's population lives with a lack of plumbing facilities, which is slightly below the national and state average of 0.4%. Georgetown County has .5% of homes with plumbing facilities. Horry County has the lowest percentage with .3% of homes and Williamsburg County is the outlier with .9% of the population dealing with a lack of plumbing facilities.

Chapter II. Background

Natural Environment

Topography and Coverage



The topography in the Waccamaw Region is generally level to gently sloping. The elevations range from sea level to just over 100 feet above in the northern part of Horry County. The generally flat topography is intersected by meandering streams covered by extensive flood plains and numerous swamps. The region is 39.5% forest, 13.2% scrub, 17.6% non-forested wetland/marshland, 11.9% agriculture/grassland, 10.6% percent water and the remaining 7.2% is covered with built urban areas and barren disturbed land.



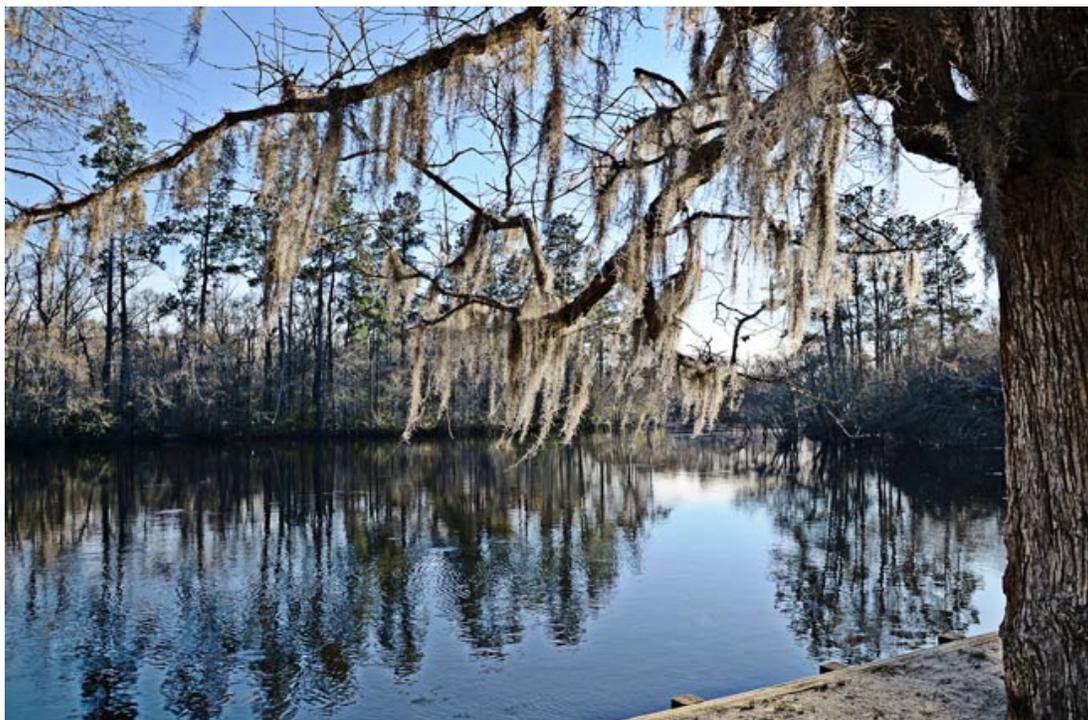
Soils

The region is composed of several basic types of soils: tidal swamp, marsh soils, and sand dunes; Atlantic Coast Flatwoods soils; poorly drained coastal soils; and riverine alluvial and swamp soils. The soils have developed from nearly level beds of unconsolidated sands, silts and clays, and soft limestone. Erosion has been none to slight. The soils have loamy sand or sandy loam surface textures, and sandy loam to sandy clay subsoils.

Water Resources

The entire region is in the Pee Dee River Basin, with the exception of the extreme southern portions of Georgetown and Williamsburg counties which are in the Santee River Basin. Drainage in the Pee Dee basin is southeastward from sections of North Carolina and the eastern portion of South Carolina. Principal drainage within the region is provided by several meandering streams which traverse or border the three counties: the Waccamaw, Great Pee Dee, Little Pee Dee, Black, Lumber, Sampit, and Santee rivers, their tributaries, and the Intracoastal Waterway.

Groundwater in the region is present in a water-table aquifer. There are also three artesian aquifers: the Pee Dee, Black Creek, and Tuscaloosa. The bedrock rock below the Tuscaloosa aquifer is impermeable for all practical purposes. Waters in the Tuscaloosa, Pee Dee, and Black Creek aquifers under non-pumping conditions move very slowly, only a few feet per year. They move, more or less, in a horizontal direction from their recharge areas in the northwest toward their discharge areas along the coast.



Chapter II. Background

Wetlands

Wetlands are those areas that are inundated or saturated by surface or ground water at a frequency and duration sufficient to support, and under normal circumstances do support, a prevalence of vegetation typically adapted for life in saturated soils. Wetlands total almost one-half million acres or twenty-two percent of the region's land cover. These wetlands consist of forested wetlands which include swampland and non-forested wetlands such as the area's marshland.

There are 534,185 acres of critical areas that fall under the protection of the Coastal Zone Management Act of South Carolina. Regulations governing development in these areas have been in effect since September, 1977.

Climate

The region lies completely within the Atlantic Coastal Plain. The region is noted for its mild humid maritime subtropical climate which creates mild winters, pleasant autumn months, and hot humid summers. The mild climate and the coastal location make the area popular for tourism and retirement. The mean annual temperature in Myrtle Beach is 72.9 degrees Fahrenheit with an average of 33 days when the low temperatures is less than 32 degrees Fahrenheit and 21 days when the high temperatures are greater than 90 degrees Fahrenheit. The coastal location of the Grand Strand area mitigates some of the summer heat, an example of this is the inland city of Florence averages 65 days of temperatures that are 90 degrees or higher. Mean annual precipitation is 48.24 inches, with 46.8% occurring from June through September. November and April are the driest months of the year. The record high temperature for Myrtle Beach is 106 degrees Fahrenheit and the record low is 4 degrees.

The Waccamaw region is exceptionally vulnerable to hurricanes, severe thunderstorms, and the associated flooding due to heavy rains. Couple this with the topographic features of a coastal plain: land at sea level, plentiful marshland, and five tidal rivers that drain into a central location and that makes for a region that is exceptionally vulnerable to disasters. As information on climate change states that the likelihood of severe weather will increase, the Waccamaw region will need to make considerable plans and investments in economic resiliency.



REGIONAL INFRASTRUCTURE & COMMUNITY FACILITIES

Infrastructure is a key component to economic growth and the well-being of an area. The Waccamaw Region is no exception. Due to the lack of private investment infrastructure, funding in the region is heavily dependent upon federal, state, and local government assistance.



Private investment has historically been slow because of the region's rural, agrarian past. However, with the reduction in federal funding, private investment is becoming a more important tool for fostering economic growth and development.

Major Roads and Highways

The region is traversed by several significant state highways, (South Carolina Highways 9, 22, 31, 41, 51, 90, 261, 319, 410, 512, 513, 527, 544, 707, and 905) and seven federal highways (U.S. Highways 17, 52, 76, 378, 501, 521, and 701). There is no interstate access in the region. Interstate 95 is accessible by traveling west on U.S. 521 and west on U.S. 501. It would take a 60 minute drive northwest on U.S. 521 to reach the nearest I-95 access in Manning. Map Exhibits 1A and 1B illustrate the region's major highways and provide traffic counts.

The Grand Stand Area Transportation Study (GSATS) Policy Committee is the Metropolitan Planning Organization (MPO) for the Myrtle Beach Urbanized area. WRCOG and the South Carolina Department of Transportation (SCDOT) Planning Section are designated as the MPO staff. WRCOG provides transportation planning staff through federal funding for the MPO. WRCOG has partnered with SCDOT in creating a Rural Long Range Transportation Plan to identify and prioritize the highway needs in the region. WRCOG serves as the Rural Planning Organization (RPO) for the non-urbanized areas of Georgetown and Horry counties and all of Williamsburg County.

WRCOG staff works with local, state, and federal officials to identify existing and future transportation needs for the region. Rapid residential development, especially in the Georgetown and Myrtle Beach areas, has caused congestion within the existing transportation systems. The capacity of the region's existing roads and highways continues to be of concern in light of the increase in residential development and the

Chapter II. Background

tourism industry. As the region continues to grow, existing congestion along the coastal areas will be exacerbated, in particular during the tourist season (June through August). New roads and improvements to existing roads will be needed in and near the urban centers as well as along connectors between urban centers. Funded transportation improvements within the region's urban area are illustrated on Map Exhibit 2. Long-range transportation projects and needs within the region are illustrated on Map Exhibit 3.

Major Roadways with 2011 Traffic Counts

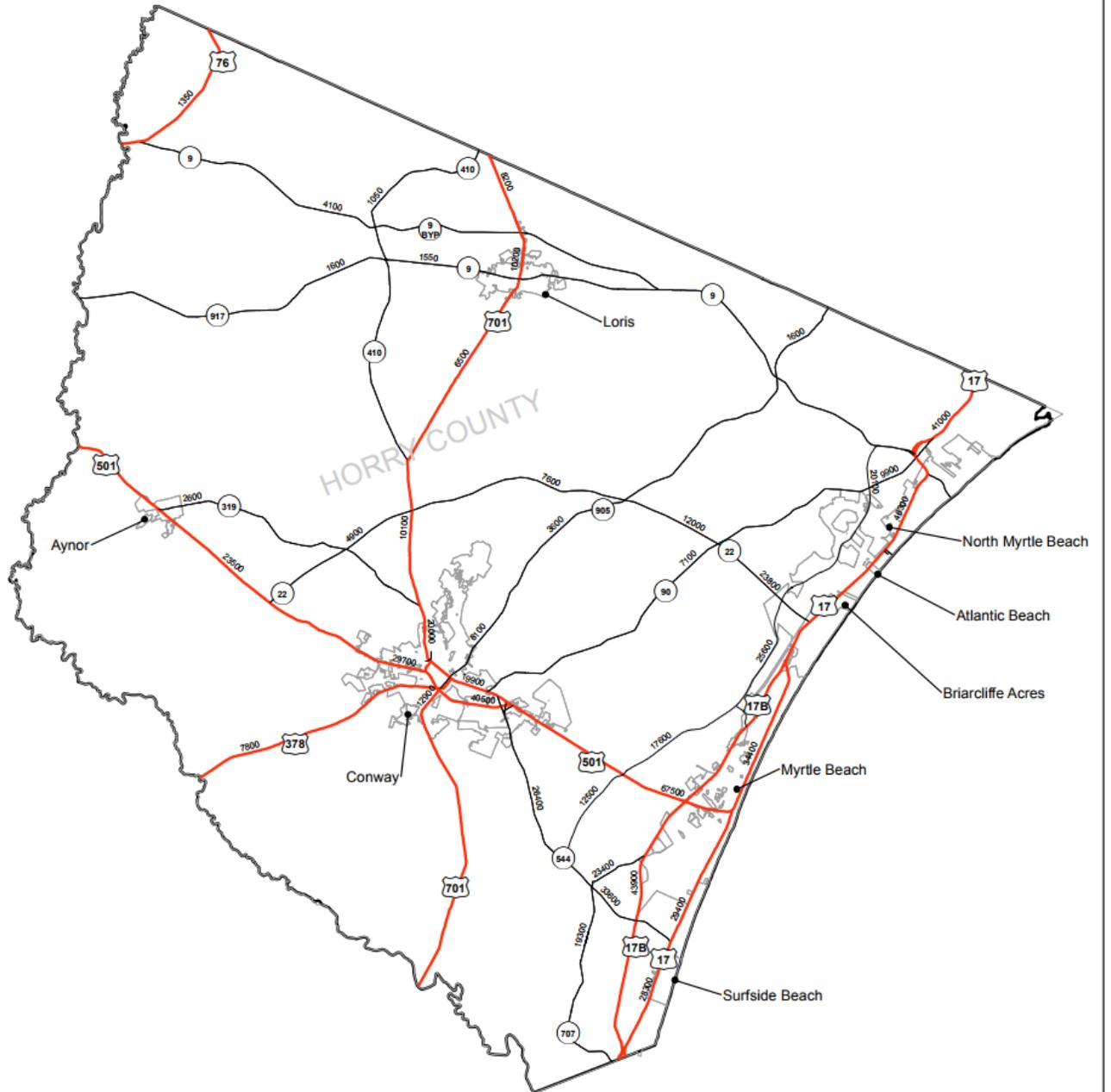
*Comprehensive Economic Development
Strategy for the Waccamaw Region*

2017-2022
Map Exhibit 1B

Legend

Roadways

- State Highway
- Federal Highway
- [1290] Traffic Count

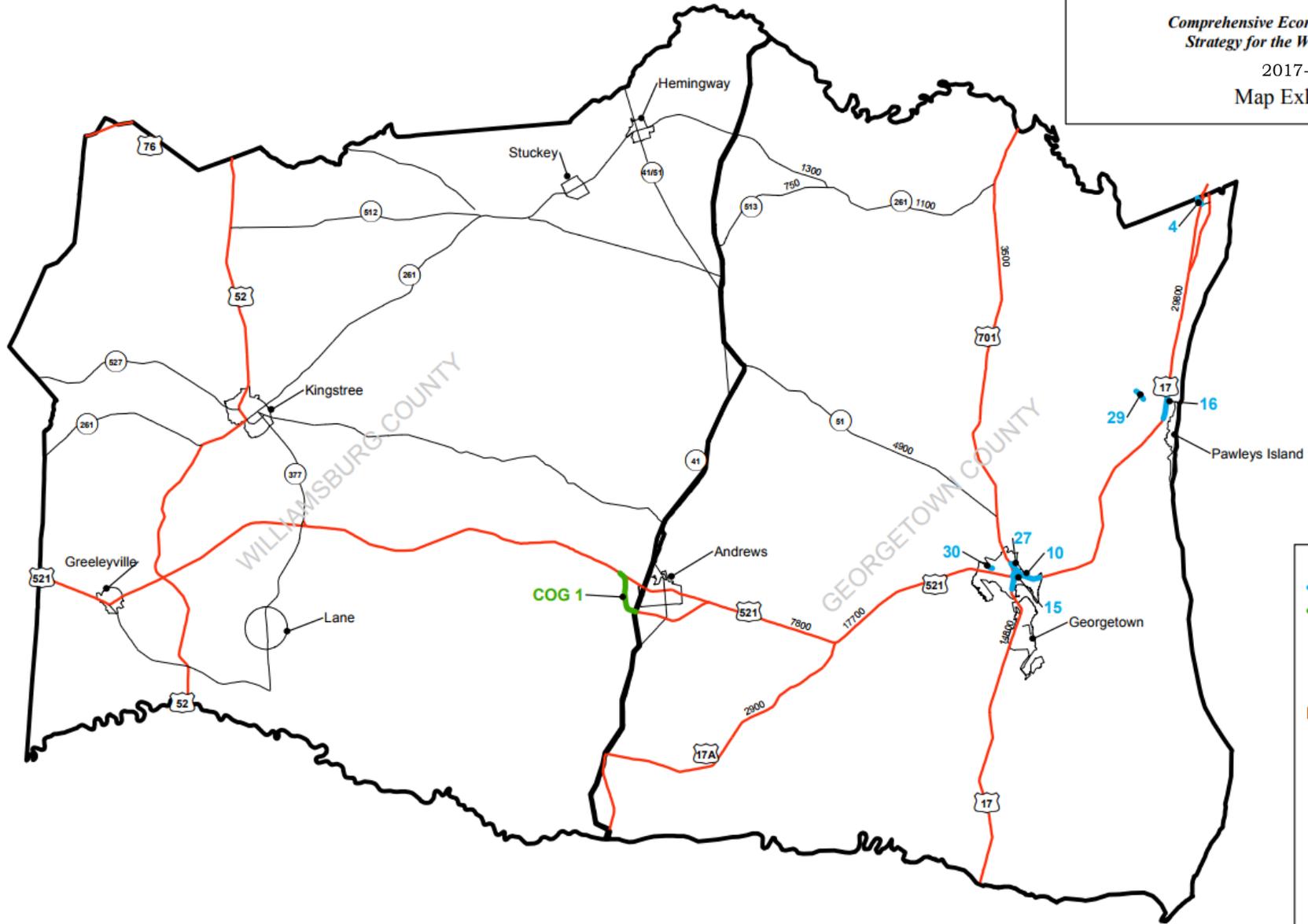


DISCLAIMER: This map is a graphic representation of data obtained from various sources. All efforts have been made to warrant the accuracy of this map. However, WRCOG disclaims all responsibility and liability for the use of this map.

Funded Transportation Improvements

*Comprehensive Economic Development
Strategy for the Waccamaw Region*

2017-2022
Map Exhibit 2A



Legend

- GSATS (Urban)
- WRCOG (Rural)

Roadways

- State Highway
- Federal Highway

Project Rank

- COG 1: Andrews Bypass Phase II
- 4: SC-707 Widening
- 9: US 17 @ US 701 & US 521 Whitetopping
- 10: City Of Georgetown Signal System
- 15: US 17 & 521 Drainage Project
- 16: US 17 Median Consolidation
- 27: Black River Road Widening
- 29: Waccamaw Elementary Bike Path
- 30: Georgetown Middle Sidewalk

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Funded Transportation Improvements

*Comprehensive Economic Development
Strategy for the Waccamaw Region*

2017-2022

Map Exhibit 2B

Legend

 GSATS (Urban)

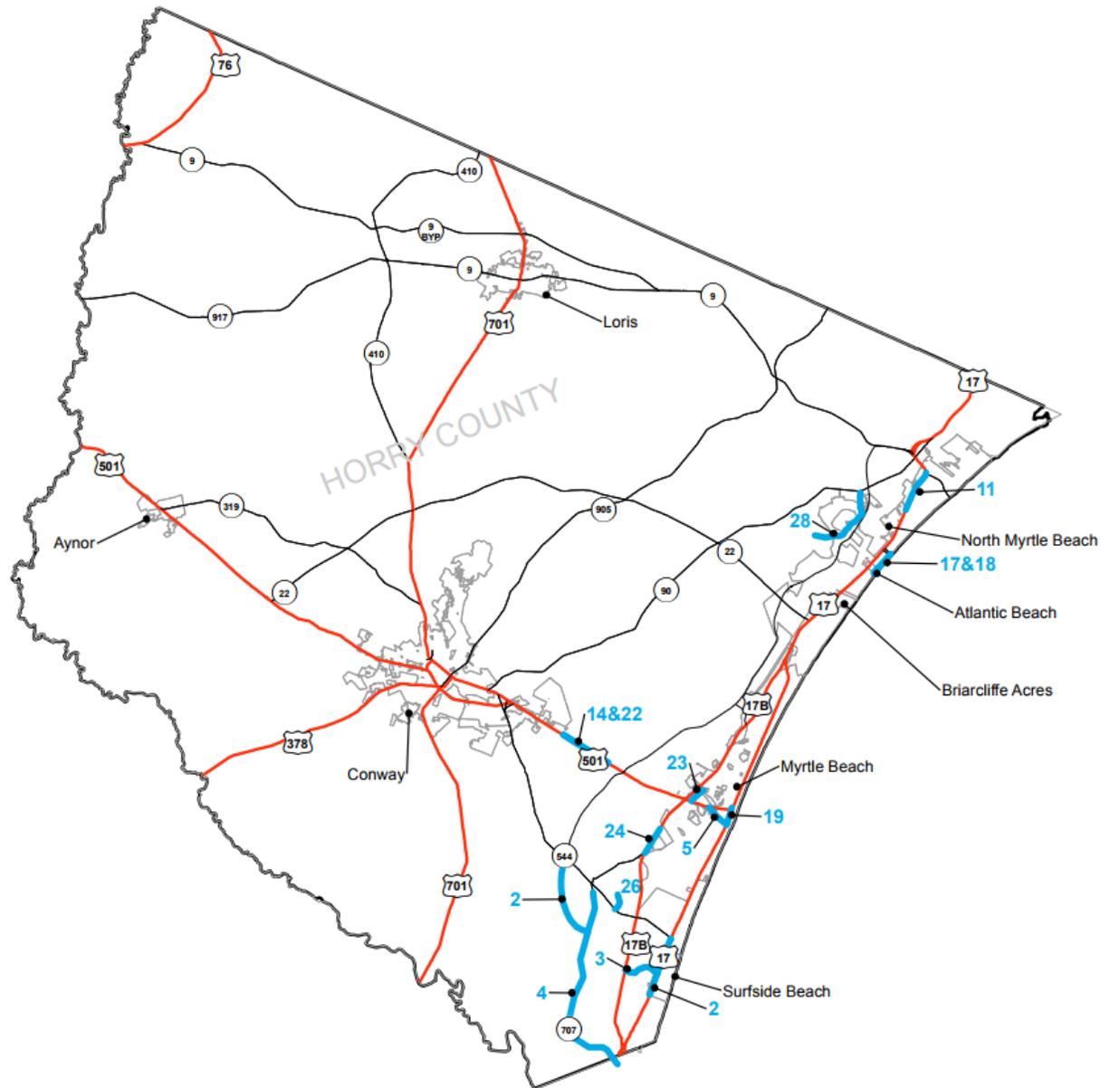
Roadways

 State Highway

 Federal Highway

Project Rank

- 2: Carolina Bays Parkway Phase III- SC 544 to SC 707
- 3: Glens Bay Road Widening and Interchange
- 4: SC-707 Widening
- 5: 3rd Ave S Widening
- 11: US 17 Widening (2nd Ave North to Sea Mt. Highway)
- 14: US 501 North Widening
- 17: SC 65 Widening
- 18: Atlantic Beach Connection at 2nd Ave.
- 19: Kings Highway Improvements
- 22: US 501 South Widening
- 23: Seaboard Street Widening
- 24: US 17 Bypass Widening
- 25: Surfside Frontage Roads
- 26: Palmetto Point Extension to SC 544
- 28: West of the Waterway Parkway



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Alternate Transportation Systems

The region's alternate transportation systems include:

Rail. The region's passenger rail services are provided by Amtrak. Two Amtrak trains, the Palmetto and the Silver Meteor, make stops in Kingstree (Williamsburg County). The Silver Meteor services a route from Miami, Florida to Boston, Massachusetts, while the Palmetto services a route from Savannah, Georgia to Boston. In 2008, thirteen thousand passengers boarded or disembarked from the Kingstree station making it the 5th largest passenger depot in the state. Full-service Amtrak stations are also located just outside the region in Charleston and Florence.



Kingstree Amtrak Station

Regional and interstate freight service is provided by the CSX railroad. The railroad maintains three lines in the Waccamaw Region with rail access in the City of Georgetown, Town of Andrews, Town of Hemingway, and Town of Kingstree. A short-line carrier, the Carolina Southern Railroad Company, used to provide freight service in Horry County. Carolina Southern used to oversee 95 miles of track, 11 engines, 10 cars, and the ability to transport freight materials weighing 1.7 million tons or more. The

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company permanently closed in 2012. R.J. Corman Rail service purchased, re-opened, and is currently operating 90 miles of the Carolina Southern Railway. Those 90 miles stretch from Whiteville to Myrtle Beach.

Waterways and Ports. Water is one of the region's greatest resources. The Intracoastal Waterway which follows the Waccamaw River is accessible in Horry County and the eastern side of Georgetown County. This waterway is a tourist paradise and has some residential development along its corridor. Despite its accessibility in the two counties, the Intracoastal Waterway is limited for industrial development usage.

The Sampit, Black, and Pee Dee rivers snake through Georgetown and Williamsburg County and provide beautiful recreation opportunities, but have little potential for industrial development due to the high cost and demand for residential development. All three major rivers empty into the Winyah Bay which provides a direct link to the Atlantic Ocean. The Black River has been granted a scenic river designation, making it undesirable for industrial development along its corridor in Williamsburg County and Georgetown County.

The ocean access of the Sampit River is the catalyst for the Port of Georgetown. By way of the Sampit River, Georgetown and the surrounding areas gain port access with only the added cost of land transportation to either Charleston, South Carolina or Wilmington, North Carolina. The South Carolina Ports Authority owns and maintains the Port of Georgetown. As the state's only dedicated breakbulk cargo port, the facility provides approximately thirty acres of open storage, over 130,000 square feet of shelter storage, and offers direct access to a CSX rail-transfer terminal.



Aerial View of the Port of Georgetown

Georgetown County and the City of Georgetown led efforts to secure funding to dredge the shipping channel that threatened the long term viability of the Port of Georgetown. However, as of July 24, 2017 the CEO of South Carolina Ports Authority, Jim Newsome, stated that the port was most likely going the close. Leadership says the port in Georgetown's fast-silting harbor is no longer economically feasible and the \$70 million it would cost to dredge to maximum depth and the addition \$6 million a year to keep it clear was an expense the federal government would not pay. The Georgetown port handled a record 1.68 million tons of cargo in 1999. Based on data provided by Fitsnews from SC Ports Authority the Georgetown Port moved 249,000 tons of cargo in 2016 and it moved only 7,400 tons in 2017. The cargo that used to flow through Georgetown seems to be going to the thriving Port of Charleston, which is around 60 miles south of Georgetown.

Bus Services. In Horry and Georgetown counties, the Coast Regional Transportation Authority (Coast RTA) provides bus and shuttle service. Coast RTA maintains thirteen fixed routes extending from Conway to Myrtle Beach and from North Myrtle Beach through the City of Georgetown and Andrews. Coast RTA also provides passenger service along Ocean Boulevard and to Coastal Carolina University. Paratransit service is available through subscription and by demand response.



Coast RTA Bus

The Williamsburg County Transit System provides bus service through Williamsburg County via nine fixed routes. Each route extends through Georgetown and into Horry County, terminating in Myrtle Beach. This service's primary function is to transport inland workers to the Grand Strand area to work in the hospitality industry. The transit system also provides demand response service from Williamsburg County to Florence, Manning, Georgetown and Charleston.

Greyhound is the region's primary commercial bus service, with two southbound and two northbound trips traversing the region daily. Trips originate from Georgetown and Myrtle Beach.

Airports. The Myrtle Beach International Airport (MYR) services the air transport needs of the region and it's the area's only commercial airport. Formerly part of the Myrtle Beach Air Force Base, the airport opened to commercial aviation in 1976 and was designated an international airport in 1995. Customs and immigration services are available to receive international visitors and packages. Myrtle Beach International Airport is owned by Horry County and completed a \$118 million terminal expansion and renovation of its old terminal in late 2014.



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Several general aviation airports are located within the region. Georgetown County is served by the Georgetown County Airport with a runway length of 5,000 feet, which can accommodate private planes. The Town of Andrews has a non-commercial airport that can accommodate recreational and small commercial aircraft. Horry County also has the Grand Strand Airport in North Myrtle Beach, the Conway-Horry County Airport that serves private and corporate aircraft with parking, and the Twin City-Loris Airport that serves as an unattended public-use airport. Williamsburg County is served by two airports, the Kingstree Airport located outside of Kingstree, which has a runway that is 5,000 feet in length and 75 feet wide. The Stuckey Airport located in the town limits of Stuckey which has a runway that is 3,386 feet I length and 50 feet wide.



Myrtle Beach International Airport

Motor Freight. In addition to UPS and Federal Express, there are at least thirty-five motor freight carriers operating in the region. There are also numerous local independent carriers that supply the region's paper, lumber, and steel mills.

Water and Sewer

Water and sewer services are in high demand in the region and because of its rural make up, these projects are expensive to provide and operate. Funding for projects remains a priority as federal and state funds to provide these services become less available. In some cases, the lack of existing water and sewer services or the inadequate capacity of existing systems creates a barrier to economic development because it limits where an industry can locate in the region despite an abundance of available land.

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The region is served by fourteen potable water and thirteen wastewater treatment providers; they include municipal, rural, and private providers. Potable water and sanitary sewer remains inaccessible to smaller towns in the more rural areas.

The region's population that is not served by public potable water and sewer system must rely on well water, or purchase bottled water, and use septic systems for sewage disposal. Septic systems often malfunction due to the region's physiographical limitations. Also, failing or malfunctioning septic systems present the danger of contaminating the water resources that are so important to the economic health and well-being of the region.

The State of South Carolina Department of Health and Environmental Control (DHEC) issues a list of "Environmentally Distressed Communities" for water and sewer needs. Of the 93 communities statewide, the region has 32 on the sewer needs list, with 17 of those being located in Williamsburg County. Of the 58 communities statewide that are in need of public water 23 are located in the Waccamaw region.

Energy Distribution

Electric power is provided by five utility companies: City of Georgetown Electric Utility serving the city; Horry Electric Cooperative serving parts of Horry County; Progress Energy serving parts of Williamsburg and Georgetown Counties; and Santee Electric Cooperative serving parts of Georgetown, Horry, and Williamsburg Counties.

SCANA Corporation and its subsidiaries provide natural gas to the region. SCANA's Carolina Gas Transmission Corporation is an interstate gas transport company that provides gas delivery directly to industrial customers.

Solid Waste

Solid waste services are provided to the region by municipal and private collectors. Disposal is provided by Georgetown County, Williamsburg County, and the Horry County Solid Waste Authority.

Communications

The region has one daily newspaper, one tri-weekly newspaper, and eight weekly newspapers. Landline telephone service is provided by Frontier Communications, Horry Telephone Cooperative in Horry and Georgetown Counties, and Farmers Telephone Cooperative in Williamsburg County. There are fifteen radio stations and three television stations in the region. Fiber optics, switching digital, and cable services are also available in the region.



Industrial Parks

The Waccamaw Region has two certified industrial parks, Williamsburg Cooperative Commerce Center and the Cades Industrial Park. The region has three Palmetto Sites, the Myrtle Beach International Tech and Aerospace Park, Coastal Technology Park (Georgetown) and the Epps Industrial Site #2 (Kingstree). The region has many other sites that are not certified or designated Palmetto Sites.

Post-Secondary Educational Facilities

The region has three public post-secondary educational institutions: Coastal Carolina University, Horry-Georgetown Technical College, and Williamsburg Technical College:

- Coastal Carolina University (CCU) is located in Conway on a 630 acre campus adjacent to US 501. CCU enrolls over 9,000 undergraduate students and offers baccalaureate degrees in fifty-five areas of study. The university's graduate school offers ten master's degree programs. According to US News Coastal Carolina ranks as the 8th best value school in the nation and the 21st among top public schools.
- Horry-Georgetown Technical College (HGTC) has campuses in Conway, Myrtle Beach, and Georgetown. HGTC enrolls over 7,000 students, over two-thirds are part-time students. HGTC offers more than 70 associate degree, diploma, and certificate programs of study.
- Williamsburg Technical College (WTC) is located in Kingstree on a 41 acre campus. WTC offers a variety of programs including six associate degrees, three diplomas, and 19 certificate programs. The college enrolls approximately 730 full and part-time students. Just over two-thirds of the student population is part-time.
- Golf Academy of America has a campus at 1900 Mr. Joe White Avenue, Myrtle Beach. The faculty and staff at Golf Academy of America in Myrtle Beach are PGA Professionals. PGA Master Professionals and other educators. You'll get professional coaching and instruction that prepares you for future success – with your golf fame and in teaching others. You'll also start developing a golf network with your PGA Professional instructors and fellow students at the center of it. This network – and the training you will receive – will benefit you in golf industry careers including: Club management, Food and beverage, Golf manufacturing, Golf course management, Tournament administration, Golf instruction, Retail and club repair.
- Miller Motte Technical College (MMTC) is located in Conway provides programs in a combination of classroom learning and hands-on-training that gives graduates the knowledge and confidence to enter the workforce immediately after graduation.

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- Pittsburgh Institute of Aeronautics (PIA) located at the International Technology and Aerospace Park near South Carolina's Myrtle Beach International Airport. The school offers the Aviation Maintenance Technology (AMT) Program which prepares students for the FAA Airframe and Powerplant Certification exams.
- Webster University Myrtle Beach Campus offers accredited graduate school education to students in South Carolina and across the world. With opportunities to study in Myrtle Beach or earn a degree online, academic programs are focused on student success and taught by faculty with professional experience in their academic fields.

Medical Facilities

The area is served by several medical centers. These include:



Tidelands Health, Waccamaw Community Hospital

- *Conway Medical Center.* The Conway Medical Center (CMC) is a 210-bed facility, providing services from over 200 physicians and a staff of over 1,400. CMC provides critical care, laboratory, diagnostic, endoscopy, heart, pediatric, surgical, long-term care, and rehabilitative services. CMC opened in the 1950s and underwent an expansion with the construction of a new patient center in Carolina Forest.
- *Tidelands Health System.* The Georgetown Health System recently rebranded as Tidelands Health to reflect its new expanded role within the Waccamaw Region. The



Tidelands Health System consists of the Georgetown Memorial Hospital, the Waccamaw Community Hospital, the Waccamaw Rehabilitation Hospital, the Tidelands Health Group, the Tidelands Nextstep Services, the Tidelands Health Foundation, and the Tidelands Community Care Network. Georgetown Memorial Hospital (GMH) has been open since 1950 and is a 131-bed hospital that is an accredited chest pain center and an advanced primary stroke center. The facility has been recognized for excellence in patient care by numerous organizations, including The Joint Commission, Healthgrades, and CareChex. GMH has undergone extensive renovations and features new patient care areas, including modern patient rooms, a state-of-the-art labor and delivery unit, a Level II nursery, a new cardiac catheterization suite, expanded onsite laboratory and redesigned emergency department triage areas. The Waccamaw Community Hospital is a 167-bed facility that has been rated one of America's 100 best hospitals for orthopedic surgery by Healthgrades in 2015, holds Joint Commission certifications in childbirth and joint replacement and is an advanced primary stroke center. The Waccamaw Rehabilitation Hospital is the only inpatient rehabilitation hospital in the Tidelands region. This hospital within a hospital, located inside Tidelands Waccamaw Community Hospital, is also one of only a handful of facilities in South Carolina accredited by the Commission on Accreditation of Rehabilitation Facilities. The 43-bed hospital is the first CARF-accredited facility in the state offering both stroke and amputee specialties. The Tidelands Health Group and NextStep Services includes over 30 centers that provide a variety of services from Hemingway to Myrtle Beach. Tidelands Health is also connected to the Health Foundation; a non-profit that raises money to support the advancement of healthcare in Georgetown and Horry counties. The Tidelands Community Care Network is a communitywide public-private partnership that is dedicated to increasing access to healthcare and other essential services for the medically underserved and uninsured. TCCN has been honored as Program of Promise by the National Hospital Charitable Service Awards Program. Most recently Tidelands Health partnered with MUSC to implement a new intern program.

- *Grand Strand Health.* Grand Strand Health consists of the Grand Strand Medical Center, North Strand ER, South Strand Medical Center, The Advanced Wound Center, The Breast Care Center, Carolina Forest Imaging Center, and Healthfinders. The Grand Strand Medical Center (GSMC) is a 301-bed acute care hospital serving residents of Horry and surrounding counties. This center offers the only cardiac surgery program, neurosurgery program and pediatric intensive care unit (PICU) in Horry and Georgetown Counties and is a designated Level I Adult Trauma Center and Level II Pediatric Trauma Center by South Carolina DHEC. GSMC is recognized by the Joint Commission, a leader accreditor of healthcare organizations in the US, for the following programs: chest pain, knee and hip replacement, sepsis and stroke.

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The center also received awards from the American Heart Association for exceptional treatment of heart attacks and strokes.

- *Lighthouse Care Center of Conway.* The Lighthouse Care Center of Conway (LCCC) is a 112-bed facility that provides mental health services. LCCC provides three levels of care and offers six programs, treating adolescents through older adults. Daily activities include individual and group therapy, recreational therapy, daily meditation and reflection, medication management, and detoxification.
- *McLeod Health.* McLeod Health manages 8 facilities across the Pee Dee region of South Carolina. Their primary service area includes Horry, Marion, Florence, Clarendon, Dillon, Marlboro, Darlington, and Chesterfield Counties. Their secondary service area includes Georgetown and Williamsburg Counties as well as boarding counties in North Carolina. McLeod Health operates a total of 7 hospitals and 931 acute licensed beds. These hospitals include McLeod Regional Medical Center in Florence, McLeod Darlington, McLeod Dillon, McLeod Health Cheraw, McLeod Health Clarendon, McLeod Loris, and McLeod Seacoast. McLeod Seacoast, in Horry County, is currently expanding to add a 50-bed inpatient tower and concourse.
- *Williamsburg County Memorial Hospital.* Located in Kingstree, the Williamsburg County Memorial Hospital provides area residents with inpatient and outpatient general medical, surgical, and 24-hour emergency care. The 60,000 sq. ft. hospital facility operates under a critical access designation and provides 25 inpatient beds. The hospital employs 187 persons and is affiliated with 11 local private practices.

SUMMARY OF AREA CHARACTERISTICS AND SIGNIFICANT TRENDS

The preceding sections provide an overview of the region's characteristics and background data on the area's geography, population, natural environment, transportation, and infrastructure. A review of this data reveals the following trends within the Waccamaw Region:

- The Waccamaw Region has experienced tremendous population growth, exceeding state and national rates. This growth is projected to continue through the year 2030, with the estimated regional population approaching one-half million within the next twenty years.
- Regional growth has not been evenly distributed. The region's rural areas, Williamsburg County and western Georgetown County, have seen stable to declining populations. Population growth has not been centered in the area's municipalities, as most municipalities have also witnessed stable to declining populations.
- The population of the Waccamaw Region is aging. The region's median age exceeds the state and national average. The aging of the population is attributable to national demographic trends but is amplified by the relocation of retirees to the area.



- Education levels are improving in the region with Georgetown and Horry counties approaching parity with state and national averages. Williamsburg County remains below regional, state, and national averages.
- Household incomes continue to rise, with Georgetown and Horry counties at or near the state average. Household incomes in Williamsburg remain low with poverty rates hovering around thirty percent of households.
- The rate of growth in the region’s housing stock has surpassed the rate of population growth. As a result, the region’s housing stock is relatively new. The region provides a diversity of housing by type and value.
- The area’s natural resources, including favorable climate, beaches, and scenic beauty, are conducive to continued population and economic growth.
- The area’s infrastructure is generally conducive to economic development. The area is served by several major highways, a port, an international airport, and has rail service. Public post-secondary institutions are located in all three of the region’s counties. The area is served by several medical facilities and clinics.
- The lack of interstate access provides an impediment to economic development.
- The state of South Carolina experienced its highest rates of employment growth in its coastal areas. The Grand Strand experienced a 2.6% growth in 2016. Construction employment has grown 12.3% in the Myrtle Beach, which was even higher than the Charleston area which saw 9.8% growth.

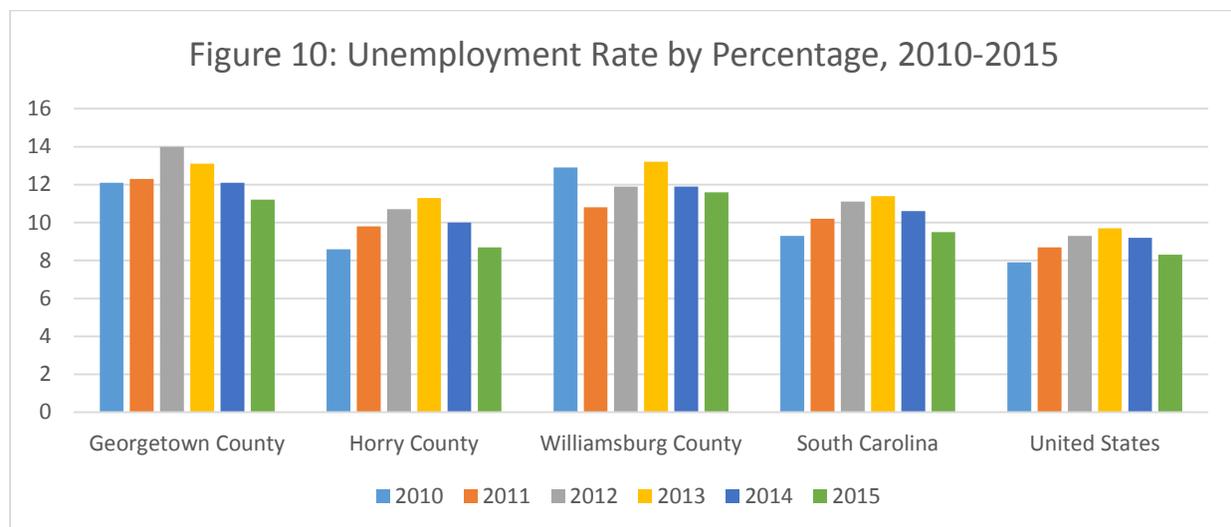
STATE OF THE REGIONAL ECONOMY

The Waccamaw Region can be described as having two economies: that of the Grand Strand, which includes Horry County and parts of Georgetown County, and that of the rural inland which includes western Georgetown County and all of Williamsburg County. This section provides an overview of regional economic conditions.

Workforce

The US Census Bureau's American Community Survey (2010-2015) estimated that the region's civilian labor force consisted of 180,077 residents. The region's labor force participation rate was 57.3% as of 2015 down from 60.2% in 2010. The region's rate is lower than the state's rate of 60.9% and the nation's rate of 63.7%. When looking at the counties, Horry has the highest labor force participation rate of 59.1%, Georgetown follows that up with 51.7%, and Williamsburg has the lowest rate with 48.5%.

Unemployment



Source: US Census, American Factfinder 2015 Estimates

Unemployment rates peaked in 2012 and 2013 at the height of the great recession. Unemployment rates in each county, the state and the nation all dropped in 2015. In 2013 the state of South Carolina and the Waccamaw Region suffered from double digit unemployment rates. The state, Georgetown County and Horry County have recovered to levels before the 2012 spike in unemployment.



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The South Carolina Department of Employment and Workforce maintains their own unemployment numbers. SC DEW estimates more recent unemployment rates for each county and the state:

	GEORGETOWN COUNTY	HORRY COUNTY	WILLIAMSBURG COUNTY	SOUTH CAROLINA
2016	6.5%	5.6%	7.5%	4.8%
MAY 2017	4.5%	3.9%	5.2%	3.6%

Robert Salvino, Ph.D., Coastal Carolina University economics professor, developed the 2017 Waccamaw Region Economic Outlook. His analysis states that employment growth in the spring quarter, year-over-year, was led by Horry County with a 3.5% increase to 137,064 jobs, while Georgetown and Williamsburg added .8% (reaching 24,406 jobs) and 1.8% (reaching 11,852 jobs) respectively. Unemployment rates declined for each county, to 4.3% in Horry, 4.9% in Georgetown, and 5.6% in Williamsburg. Slower growth in employment and a more modest decline in the unemployment rate are projected for each of the three counties, as the labor market approaches full employment, or the natural rate of unemployment. This is in line with national and state indicators. Tourism indicators reflect positive growth in accommodations, on volume and revenue, and spending on retail. A closely watched indicator of the tourism economy, the 1.5% Horry County Hospitality Fee, increased 7.2% in the spring quarter, year-over-year. Residential construction also continues on its growth trajectory, recording over 1,265 single family permits in the spring quarter, up 10.9% year-over-year. The pace is above the long-term average construction volume but well below the unsustainable boom-period peak of 2005-2006. Horry and Georgetown counties generated more than \$22.4 million in accommodations taxes in 2016, more than one-third of the state’s total accommodations tax collections according to the South Carolina Department of Revenue.

Large Regional Employers and Sectors of Employment

The region’s largest employers have traditionally been the respective school districts, county governments, and the area’s hospital systems. According to Myrtle Beach Regional Economic Development the top employer in Horry County is Horry County School District (5,473), second is Horry County Government (2,178), and the third largest employer is Coastal Carolina University (1,582). The South Carolina Department of Employment and Workforce submits a top 20 list of employers for each county. However, they do not rank them or list employment numbers due to “business confidentiality issues.” Below are the top 20 employers for each county in the region:

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Georgetown: 3V Inc., Agru/America Inc., Brookgreen Gardens, City of Georgetown, County of Georgetown, Food Lion LLC., Founders National Golf LLC., Georgetown County Department of Education, Georgetown Hospital System, Georgetown Physician Services LLC., International Paper, JusticeWorks Behavioral Care, Litchfield Group LLC., New Penn Financial LLC., Palmetto Prince George Operating LLC., Safe Rack LLC., Santee Cooper South Carolina Public Service Authority, Waccamaw Management LLC., Wal-mart Associates Inc., YMCA of Coastal Carolina.

Horry: City of Myrtle Beach, Coastal Carolina University, Conway Hospital Inc., Food Lion LLC., Grand Strand Regional Medical Center, Hilton Grand Vacations Company LLC., Hilton Worldwide Inc., Horry County Council, Horry County Department of Education, Horry-Georgetown Technical College, Horry Telephone Cooperative Inc., K-Mart Corporation, Loris Community Hospital District, Lowes Foods LLC., Lowes Home Centers Inc., OS Restaurant Services Inc., Southeast Restaurants Corporation, Wal-mart Associates Inc., Wyndham Vacation Ownership Inc..

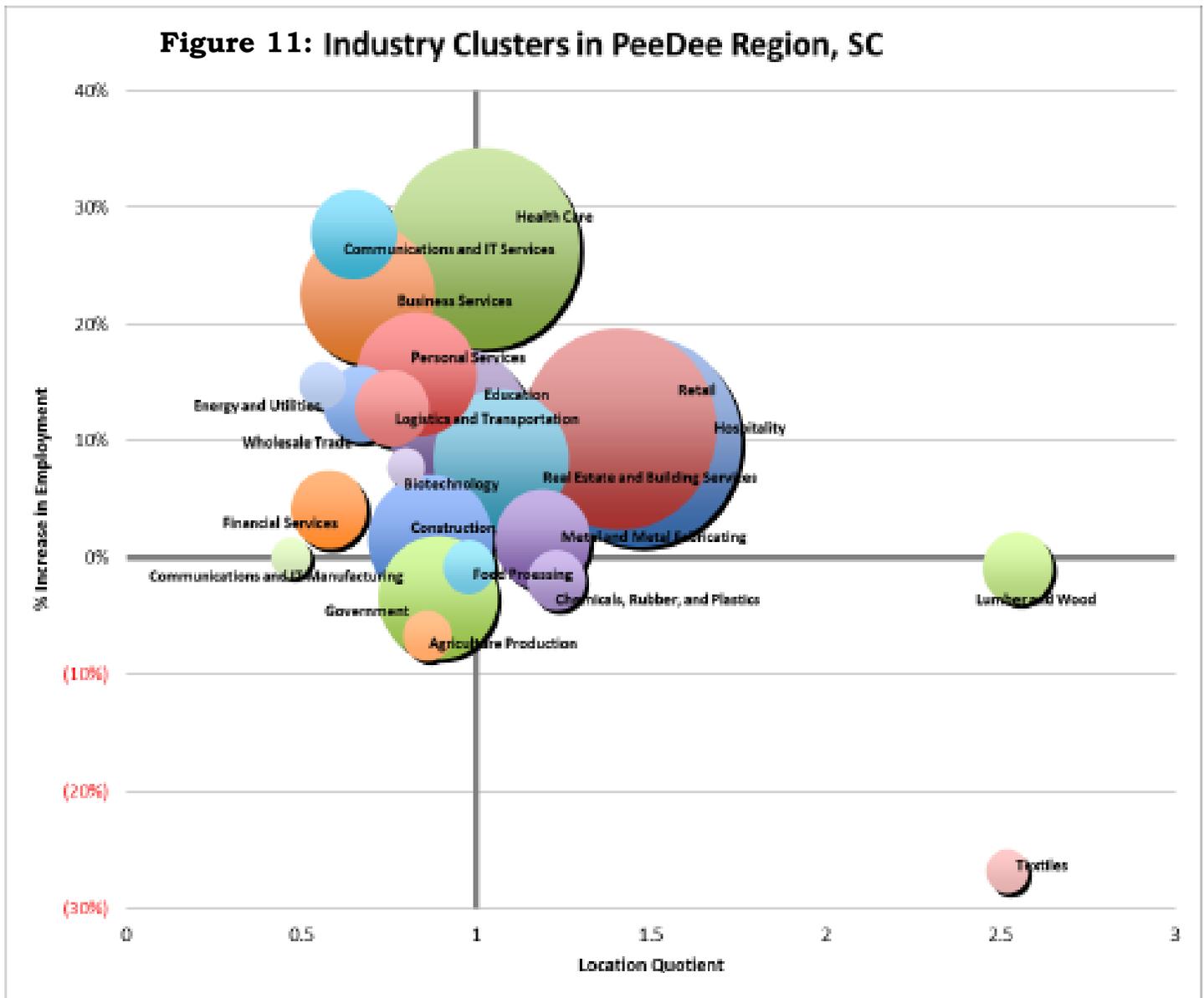
Williamsburg: Carlyle Senior Care of Kingstree, D.P. Cooper Charter School, Department of Justice, DSM Nutritional Products LLC., Embroidery Solutions Manufacturing, Farmers Telephone Cooperative Inc., House of Raeford Farm Inc., Lane Manufacturing LLC., Nan Ya Plastics Corporation America, Palmetto Synthetics LLC., Santee Cooper Cooperative Inc., Sitel Operating Corporation, Staffmark Investments LLC., Sykes Enterprises Inc., Three D Machinery Installers LLC., Tupperware US Inc., Williamsburg County, Williamsburg County Memorial Hospital, Williamsburg County School District, Williamsburg Technical College.

According to SC DEW's 2015 (Q4) Quarterly Census of Employment and Wages the Waccamaw region's largest industry is the accommodation and food services which employs over 31,000 people, following that is the retail trade industry with over 25,000 employed. Those two industries make a significant portion of the local economy. Healthcare and social assistance (16,812), educational services (12,107), public administration (7,843), manufacturing (7,745), construction (7,741), and administrative/support/waste management and remediation services (7,606) round out the area's top industries.

A significant amount of data has been developed through the state's sector strategies initiative. Below is location quotient data (a statistic that measures local competitive advantages) related to the WIOA Pee Dee Super Region which includes the EDD's of Waccamaw area, Santee-Lynches area, and the Pee Dee area). One of four regions in the state identified by SC DEW. The higher the location quotient means a higher level of industry concentration compared to national averages.



Clusters identified by the SC DEW



Lumber and Wood Products (2.55)

Other Paperboard Container Manufacturing (22.99)

Wood Preservation (25.27)

Paperboard Mills (19.16)

Timber Tract Operations (8.42)

Stationary Product Manufacturing (9.11)

Logging (7.85)

Hardwood Veneer and Plywood Manufacturing (7.19)

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Textiles (2.52)

Artificial and Synthetic Fibers Manufacturing (47.65)

Textile and Fabric Finishing Mills (19.16)

Broadwoven Fabric Mills (7.77)

Fiber, Yarn, and Thread Mills (11.36)

Narrow Fabric Mills and Schiffli Machine Embroidery (17.71)

Cotton Ginning (11.15)

Nonwoven Fabric Mills (6.32)

All Other Miscellaneous Textile Product Mills (2.99)

Hospitality (1.47)

RV Parks and Campgrounds (11.12)

Scenic and Sightseeing Transportation (8.12)

All Other Transportation Arrangement and Reservation Services (6.13)

Amusement Arcades (5.18)

Recreational Goods Rental (4.88)

Cafeterias, Grill Buffets, and Buffets (5.13)

Golf Courses and Country Clubs (3.49)

Theater Companies and Dinner Theaters (3.81)

Retail (1.41)

Chemicals, Rubber, and Plastics (1.23)

Surface Active Agent Manufacturing (33.66)

Laminated Plastics Plate, Sheet Manufacturing (3.04)

All Other Basic Organic Chemical Manufacturing (3.91)

Metal and Metal Fabricating (1.19)

Ball and Roller Bearing Manufacturing (36.96)

Other Metal Valve and Pipe Fitting Manufacturing (30.86)

All Other Transportation Equipment Manufacturing (6.54)

Other Major Household Appliance Manufacturing (10.20)

Welding and Soldering Equipment Manufacturing (8.68)

Switchgear and Switchboard Apparatus Manufacturing (7.97)

Custom Roll Forming (14.45)

Heating Equipment Manufacturing (5.41)

Metal Can Manufacturing (7.40)

Automatic Environment Control Manufacturing (14.08)

Boat Building (9.12)



- Industrial Process Furnace and Oven Manufacturing (8.19)
- Other Fabricated Wire Product Manufacturing (5.60)
- Household Refrigerator and Home Freezer Manufacturing (1.82)

As seen within the data, the larger Pee Dee region specializes in Healthcare, Hospitality, and Advanced Manufacturing. The Waccamaw region mirrors these specialties while contributing a majority of the hospitality jobs within the larger Pee Dee region, as it is the home to popular tourist destination, Myrtle Beach.

Average Wage per Job

The Waccamaw Region continues to fall behind the state in terms of the average wage per job; this gap has widened since 2010. Horry County residents fared worst in the region earning 76.9% of the state’s average wage per job in 2015, down from 93.0% in 2010. Georgetown and Williamsburg Counties have lost ground but Williamsburg has seen less of a widening. *Figure 12* provides the average wage rates for the region’s counties as compared with national and state averages.

	2010	2010	2010	2015	2015	2015
		% of State Average	% of National Average		% of State Average	% of National Average
Georgetown	\$37,340	96.2	79.4	\$37,380	92.1	70.6
Horry	\$36,119	93.0	76.8	\$31,237	76.9	59.0
Williamsburg	\$33,252	85.7	70.7	\$35,442	87.3	67.0
South Carolina	\$38,821	X	82.5	\$40,580	X	76.7
United States	\$47,046	121.2	X	\$52,929	130.4	X

Source: US Bureau of Economic Analysis

ECONOMIC PROFILES OF REGIONAL COUNTIES

Georgetown County



Front Street in Historic Downtown Georgetown

Prior to World War II, agriculture was Georgetown County's major employer. After the war, manufacturing began to replace agriculture as the county's primary economic activity. Since the mid-1980's wholesale and retail trade have increased significantly. This trend is likely to continue. Traditionally, the non-manufacturing sector of the economy usually exceeds the manufacturing sector by a ratio of 3:1.

The economic structure of Georgetown County experienced a transition in the late 1990's with the emergence of the recreation-tourist industry and the Waccamaw Neck portion of the county becoming a retirement destination. Employment in the service industry increased 30.3 percent between 1995 and 2005. During the same period, there was a 61 percent increase in the wholesale/retail industry. This compares with only a 2.9 percent increase in the manufacturing sector.

Much of the tourism dollars generated in Georgetown County occurs in the Waccamaw Division (the Waccamaw Neck) of the county. Based on figures from the South Carolina Parks, Recreation, and Tourism's report, *The Economic Impact of Travel on South Carolina Counties, 2015* (the most recent information available), 3,110 residents from Georgetown County were employed in the tourism industry. The same report found that Georgetown County ranked 8th in the state for tourism expenditures with \$321.5 million added to the local economy, up over \$10million from 2014.

The Inshore Fishing Association Redfish Tour attracted 83 boats and 166 anglers, which is an increase of about 30% since its first visit last year. The IFA has committed to making two more stops in 2016 with dates to be announced later this year. Their first stop in 2016 (in April) brought 72 boats and 144 anglers. The second stop will be in September.



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The Georgetown Port had experienced a 9.5 percent decrease in tonnage for the first two quarters in 2015; however, the Port is expected to see an increase the last two quarters over the previous year's tonnage. It was announced in 2017 that the port is set to close. Georgetown continues to recruit new industries and market the advantages of locating to the county.

Georgetown County experienced a major layoff September of 2015 with AreclorMittal Steel closing its Georgetown plant leaving 226 workers without jobs. Current plans for the mill involve re-opening under the name Liberty.

In the western, rural areas of Georgetown County, agriculture remains an important component of the economy: In 2012, the total value of agricultural products sold exceeded \$12 million and the county ranked 40th (out of 46) in the production of crops. This is a 45% decrease from 2011. Also, the forestry industry has a tremendous presence in rural areas of the county, creating jobs directly and indirectly.

Georgetown County continues to experience a drop in new businesses opening and expansions of existing businesses in the county, as it continues to recover from the most recent recession. In many cases this has been due to the lack of financing and product demand. Economic activities and major announcements occurring within the last five years include:

- MPW industry is a company that provides a variety of industrial cleaning, water purification, facility management, and environmental management services. The company's \$10 million investment is expected to result in 32 new jobs in Andrews.
- Mercom, a South Carolina-based premier technology firm, is expanding its existing operations in Georgetown County. They will invest \$6 million and expected to create 152 new jobs. The tech company specializes in cyber security, data center modernization, IT systems integration and cloud computing will build a new 20,000 sq. ft. building across the street from its existing complex. The Coordinating Council for Economic Development has approved a \$400,000 grant to assist with costs of real property improvements, as well as job development credits related to the project.
- Water and sewer providers continue to plan and expand service to under- served and unserved areas of the county. The Georgetown County Water and Sewer District continues to implement its water master plan. This plan addresses the common water needs of rural and western Georgetown County by creating a consolidated water system that will be more effective and cost efficient.

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- Horry-Georgetown Technical College will open an Advanced Manufacturing Training Center after receiving \$3.5 million in funds from county government and school district. The 30,000 sq. ft. center will be built at the Georgetown County campus and will be similar to the 25,000 facility already being built in Horry County. Both facilities will house training programs for advanced welding, machine tool, robotics, and mechatronics.

Horry County



Downtown Myrtle Beach

Horry County's economy has traditionally been divided between agriculture in the western portion of the county and tourism in the areas adjacent to the beach, with scattered light manufacturing. In the last 40 years, tourism has outgrown other segments of the county's economy. The Myrtle Beach area has been consistently highly ranked as a premier vacation destination.

Based on reports from the South Carolina Department of Employment and Workforce, 65 to 70 percent of Horry County's employment is tourism related. In 2015, Horry County led all South Carolina counties in travel expenditures, payroll income, and jobs directly generated by domestic travels. Travel expenditures reached nearly \$3.9 billion and accounted for over 40,000 jobs for regional residents.

According to a study by Dr. Robert F. Salvino (*BB&T Center for Economic and Community Development*) estimates tourism accounts for a \$7 billion economic impact and another \$2.2 billion in labor impact and 83,000 jobs throughout our local community. Economists estimate that 80% of local tourism jobs are year-round and full-time.

Agriculture remains an important segment of the economy especially in the county's western areas. The latest available Census of Agriculture (2012) identified 938 farms in



the county with an average size of 189 acres. Horry County ranked 13th in the state (out of 46) in the value of crops and led the state in the production of tobacco. The total value of agricultural products sold exceeded \$101 million.

Economic activities and major announcements occurring within the last five years include:

- Myrtle Beach Recycling Inc. announced it will locate a new \$5 million investment in Horry County focusing on paper recycling services. This investment is expected to create 15 new jobs.
- Kingman Airline Services, an Arizona-based maintenance, repair, and overhaul company, will hire 180 employees and make a capital investment of \$2.5 million.
- Executive Helijet is expanding operations in Horry County. The full-service aircraft charter, maintenance, repair and management company will add 75 new full-time jobs to their current operations, investing approximately \$1 million in equipment and facility improvements over the next 5 years.
- Banton Media, a marketing and advertising business in the Myrtle Beach area, announced it will hire approximately 30 employees. To expand their operations the company will lease office space at the Compass Center (in the Myrtle Beach area, off Highway 707).
- RJ Corman Railroad Group, along with area leaders, announced a collaboration that will open railroad services to the eastern sections of North and South Carolina. This effort will also add substantial track and bridge rehabilitation. The Federal Railroad Administration has given its approval to begin operation of the 90 mile line, which is now known as the R.J. Corman Carolina Lines (RJCS).
- Ebtron, a company based in Loris that designs and manufactures air flow measuring devices, is expanding its operations. The project is expected to bring more than \$2.5 million of new capital investment and lead to the creation of 100 new jobs over the next five years.
- A new Target building has opened in Murrells Inlet, drawing interested local shoppers and vacationers.
- Frontier Communications recently expanded existing industry with 37 new jobs and \$250,000 investment.
- Horry-Georgetown Technical College will open its new Advanced Manufacturing Facility in the Fall of 2017.

Chapter II. Background

Williamsburg County



Downtown Kingstree

Williamsburg County's agriculture industry continues to be an important component of the county's economy despite recent declines. In 1996, the county ranked 3rd in the state for cash receipts from crops. In 2012 the county had dropped to 20th, despite a 7.1 percent increase in farm acreage since 2007. Part of this trend may be attributed to the decline of tobacco as the county's premier cash crop.

The cash receipts from agriculture are still significant, but the number of people in Williamsburg County relying on agriculture for their income has dwindled since World War II. The number of farms has declined, the size of farms has increased, and the mechanization of agriculture has required less manpower to plant, sustain, and harvest crops. In 1980, 1,261 persons or 9.2 percent of the total persons employed in the county derived their income from agriculture. By 1990, only 911 persons were employed in agriculture. More recently, 2016 Q1 SC DEW Quarterly Census for Employment and Wages (QCEW) estimated that only 165 persons were employed in the agricultural sector. This represented only 1.8 percent of the county's workforce.

Nonagricultural employment patterns have also changed. Manufacturing employment sustained 37.7 percent of the workforce in 1979. Although manufacturing remains a large employment sector, ACS 2013 estimates indicated manufacturing employment has declined to 1,753 employees or 16.1 percent of the workforce. However manufacturing



is bouncing back after the 2016 Q1 SC DEW Quarterly Census for Employment and Wages (QCEW) stated that manufacturing now provided 2,480 jobs in the county or 27.2% of the workforce.

The sectors comprising the largest percentage of Williamsburg County's workforce identified by the 2016 Q1 SC DEW QCEW estimates are: manufacturing (27.2%), Education, Health Care Services, and Social Assistance (18.9%), Administrative and Support and Waste Management and Remediation Services (12.9%), and Retail Trade (9.2%).

In spite of the challenges faced due to the flooding event of 2015 and Hurricane Matthew in 2016 which rendered major wings of their hospital unsalable, Williamsburg Regional Hospital is now providing health services comparable to pre-disaster levels. In 2016 voters approved the first Capital Project Sales Tax for the county. This tax is expected to generate more than \$16.7 million over an 8-year period to fund much needed public safety projects and facilities.

Despite concerns over the lack of infrastructure, Williamsburg County is emerging as a major player in the state for attracting new industries. Many companies are taking a second look at Williamsburg County because of its economic development efforts of establishing industrial parks and providing economic incentives. The National Association of Counties' found that Williamsburg County's economy has recovered since 2002 and that we are currently well positioned for growth. Williamsburg County continues to out-perform other South Carolina counties in the same population group. The county also garnered \$25 million in new investment and announced the creation of over 100 new jobs within the 2016 – 2017 fiscal years..

Economic activities and major announcements occurring within the last five years include:

- Williamsburg County Water and Sewer Authority received CDBG funding for the Midway Water Extension Project in the amount of \$292,558.
- Williamsburg County Water and Sewer Authority received CDBG funding for the Bethesda Water Extension Project in the amount of \$330,852.
- Williamsburg County has increased the available space at the Williamsburg Cooperative Commerce Center-South by an additional 80 acres.
- United Phosphorus, Inc., a manufacturing company specializing in chemical blending operations, plans to establish a new industrial operation in Williamsburg County. The company plans to invest more than \$20 million in the project and create 65 new jobs over the next several years. This new development will involve the renovation of an existing 520,000 square-foot building.
- A provider of municipal solid waste reduction programs, has announced plans to expand its existing operations in Williamsburg County. The company is making a

Chapter II. Background

\$3.1 million investment to add 10,000 square-feet of manufacturing space. This investment is also expected to generate 27 new jobs. The South Carolina Coordinating Council for Economic Development also provided a \$125,000 rural infrastructure grant to aid in the investment.

- A Capital Project sales tax was voted in that will go toward public safety projects.
- Starcyl Cylinders announced 40 new jobs in Hemingway.
- UPI Ag Products announced 65 new jobs in Kingstree.
- Louis Harmick of SC announced 105 new jobs in Kingstree.

REGIONAL ECONOMIC CLUSTERS

Economic clusters are defined as groups of businesses or institutions that have some similarity in industry type, method of operations, technology, or supply chain. Businesses or institutions which fall within a cluster may, in some cases, be competitors within the same industry or directly compete for the same raw and finished materials. The clustering of similar or complementary business can be beneficial to the local economy in that they tend to promote a workforce with a compatible skill set, promote focused workforce training programs, and reduce infrastructure expenditures by concentrating needed improvements to smaller geographic areas. Economic clusters can also promote collaboration in production fields leading to greater innovation and efficiency.

Within the Waccamaw Region, several economic clusters were identified. These clusters include those which are prominent and longstanding, as well as those which are emerging. Regional clusters include:

Hospitality and Retail

The hospitality and retail sector is considered the largest cluster in the region. Myrtle Beach is a favorite vacation destination for domestic and foreign visitors. Approximately 37.6 percent of the labor force is engaged in employment that is associated with the tourism industry such as retail trade, entertainment, recreation, accommodation, and food service according to 2015 ACS estimates.

Healthcare -Health Science

The Waccamaw Region has become a favorite destination for retirees from all over the world. As the population continues to age, the demand for healthcare and health science firms to provide therapeutic services, diagnostic services, health informatics, support services, and biotechnology research and development will only increase.

The region has six hospital systems: Conway Medical Center, Georgetown Hospital System, Grand Strand Medical Center, Lighthouse Care Center of Conway, McLeod



Health, and Williamsburg County Memorial Hospital. Collectively these health care facilities employ approximately 5,109, ranging from highly skilled doctors to administrative assistants.

Manufacturing

Manufacturing, as of 2015, accounts for 9.7% of the area's labor force, up from 5.8% in 2010 percent; however, as the global economy changes many companies are seeing the advantages of locating or expanding manufacturing facilities within the region. There is a ready labor force, there are numerous locations in the region for manufacturing, and local incentives are available. The ports of Georgetown, Charleston, and Wilmington are just a short distance from any location in the region. In addition, rail and trucking are available.

The fact that only 9.7% of the labor force is engaged in manufacturing was an indication that the workforce is not being utilized to its full capacity. The region is ideal for manufacturing with industrial locations throughout the three counties and a workforce to fill the various manufacturing positions. The increased percentage of manufacturing labor force is a result of a concentrated effort within the region.

Transportation, Warehousing, and Logistics

Transportation and warehousing employ 3.7 percent of the region's labor force. Transportation, warehousing, and logistic are not as labor intensive as some other industries. The region is ideally located for the movement of people, materials and goods by road, air, rail, and water. The uncertainty of the port of Georgetown and the deepening of the port of Charleston creates opportunities for growth which will increase the need for warehousing and other means of transportation such as trucking and rail.

There are many small trucking firms which include owner operators, especially suppliers of forestry products for the International Paper Mill and other industries. The rail systems are a vital part of the movement of goods and people in the region. The Town of Kingstree is a frequent stop for AMTRAK, the Carolina Southern Railroad provides rail service to industries in Horry County such as Santee Cooper, and CSX provides service to much of the rest of the region.

Agriculture and Forestry

The Waccamaw Region has historically been rural and is well known for its tobacco production. The three counties have perennially ranked in the top 20 for the total value of agriculture products, with Horry and Williamsburg counties consistently in the top 10. The decline in the tobacco industry has forced farmers in the region to either become creative in finding other cash crops or leave the business. Those that remain have found ways to increase the productivity of their lands and explore new industrial uses for their

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products. New uses and applications for agricultural products present the opportunity for agriculture to evolve and remain viable within the region.

Agriculture and forestry account for 1.1 percent of the labor force. International Paper, the area's largest employer, is engaged in the harvesting of forestry products and producing paper. The numerous other support businesses to this process continue to grow as suppliers, including transportation firms which are needed as production increases.

Connecting the Region

A major issue facing the region is the lack of an interstate highway and the connectivity of the region to external markets. This plan identifies three important projects necessary to optimize the region's competitiveness:



Interstate 73 is a planned federal highway which will extend from Sault Ste. Marie, Michigan to Myrtle Beach.

The South Carolina portion of the highway will intersect with I-95 just south of Dillon. This highway will provide the area with direct interstate access thus reducing congestion, encouraging tourism and economic development, and providing enhanced hurricane evacuation for the residents of the region's northern coast.



US 521 is the southern portion of the region's major east to west connector,

linking the Port of Georgetown with I-95. Presently, this road is a four lane section from Georgetown to County Line Road in Andrews. Long range plans for this road include completion of the bypass around Andrews with eventual widening from Andrews to I-95.



The Southern Evacuation Life Line (SELL) is a twenty eight mile highway which would connect US 17 at Surfside

Beach with US 378 and US 501. Given the lack of western routes with bridges crossing over the Waccamaw River, a principal benefit for this project would be hurricane evacuation. The project would also have an obvious economic development benefit in that it would provide a primary east-west connector for the center of the region.

ISSUE ASSESSMENT

Infrastructure

Infrastructure is considered the most important issue facing the region. Civic leaders, citizens, developers and prospective industries identified roads, bridges, water, sewer, and Georgetown's port as priorities for infrastructure improvements. The region due to tourism is faced with many perils when it comes to roads. Traffic during the summer months exceeds the capacity of coastal roads, presenting unacceptable delays for locals and visitors alike as congestion reaches critical mass. In addition, the hurricane season makes evacuation from the coastal areas almost impossible. The lack of direct access to interstate highways only adds to the already congested transportation system and severely limits the area's competitiveness for future economic development.

Water and sewer is still not available to all residents in the region. In many areas, there are still residents with failing septic systems and shallow wells. Both of these situations can be and are a health hazard in many of the region's communities. Upgrades and expansion of existing systems will also be necessary in some areas to provide water and sewer to businesses wanting to locate within the region. Also there are industrial parks within the region that lack access to essential public infrastructure.



Chapter II. Background

Chapter VI of this plan identifies several road and other infrastructure projects needed to increase the economic viability of the Waccamaw Region. Planned and needed roadway projects are also illustrated on Map Exhibits 2A, 2B, 3A, and 3B.

Workforce

It has been and continues to be a concern that the workforce in the region is not capable of attracting and retaining the industries the area needs to sustain balance and growth in employees. According to studies by the National Association of Manufacturers and the Manufacturing Institute, there is a shortage of skilled labor due to changing demographics such as the retirement of the baby boomers, technical advances demanding higher skills, and increased global competition. This is compounded by the regional education attainment with the percentage of residents not having a high school diploma.

The Technical School System along with ReadySC and SC Works is responding to this challenge. The Economic Development Administration mission is to support efforts to create sustainable jobs for the residents of a region, with this in mind EDA partnered Horry-Georgetown Technical College's in funding the college's new Culinary facility and two Advance Manufacturing facilities. The Culinary Arts facility located in Myrtle Beach on the old Air Force base. The Advance Manufacturing facilities at the Horry-Georgetown Technical College in Conway opens in the fall of 2017 and the second location will be at the Georgetown Campus scheduled to open the summer of 2019. These facilities will help meet the need of the regions residents to gain the skills needed find high paying jobs while meeting the demands of employers across the state for highly trained workers.

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Comprehensive Economic Development Strategy for the Waccamaw Region



Georgetown County • Horry County • Williamsburg County

OPPORTUNITIES & CONSTRAINTS

SWOT ANALYSIS

Strengths, Weaknesses, Opportunities, and Threats (SWOT)

SWOT analysis is an important planning and economic development tool. This tool requires a review of existing factors and trends, a consideration of likely and possible future consequences, and a review of policy choices that can promote or abate both desired and undesired outcomes. SWOT analysis is considered a first step toward developing achievable goals and objectives.

For the purposes of this plan, the individual components of a SWOT analysis are defined as follows:

Strengths are attributes of the region that are helpful in achieving economic development.

Weaknesses include anything that is harmful, restricts, or limits economic development in the region.

Opportunities are external conditions or circumstances that are helpful in achieving economic development in the region.

Threats are external conditions, circumstances, or events that adversely impact economic development in the region.

The CEDS Strategy Committee reviewed existing economic trends and regional conditions. From this review, regional strengths, weaknesses, opportunities, and threats were identified. Findings are categorized by regional infrastructure (transportation, natural gas, water, and sewer); economic development; tourism, leisure, and recreation; education and workforce development; quality of life and human resources; environmental and natural resources; and government and finance:

SWOT ANALYSIS





Regional Infrastructure: Transportation			
Strengths	Weaknesses	Opportunities	Threats
The roadway network is sufficient to support industry and growth in the southeastern portion of the region.	There are no interstate highways located in the region.	Support the development of interstate highways, specifically I-73 and I-74.	Failure to upgrade and repair roads and bridges.
The rail system is adequate to meet industrial needs.	The region lacks industrial sites near four lane highways.	Improve and develop all transportation modes within the region including highways, railroads, airports, etc.	Failure to secure funding for Interstate-73.
The Myrtle Beach International Airport can provide adequate air transportation along with the Georgetown County Airport and the Williamsburg County Airport.	The region lacks rail service in proximity to industrial sites.	Support the continued improvement and development of the Port of Georgetown.	Environmental lobby.
There are numerous trucking services in the area.	There are insufficient funds to address problems such as roads they arise.		
There is proximity to port access through Georgetown and Charleston, South Carolina and Wilmington, North Carolina.	Rail systems are often overlooked as a means of transportation in the region.		
There are barge-able sites in the vicinity of Georgetown's port.	There are no interstate highways located in the region.		
The region has access to U.S. highways with direct routes to Interstates 95 and 20.	The region lacks industrial sites near four lane highways.		

Regional Infrastructure: Natural Gas			
Strengths	Weaknesses	Opportunities	Threats
Natural gas is available in some of the industrial parks in the region and the incorporated areas.	The lack of natural gas in the rural communities is a barrier to economic development.	Support efforts that would extend natural gas lines into or near industrial sites.	The lack of existing natural gas infrastructure.

Regional Infrastructure: Water			
Strengths	Weaknesses	Opportunities	Threats
There is an abundance of water in the region.	The region's rural areas lack services.	Encourage water and sewer providers to expand utilities to areas of the region that need economic development, particularly those areas with low family income and/or high unemployment.	The lack of water infrastructure and upgrades.
The water supply is adequate at most of the industrial sites.	Existing water lines lack fire hydrants.	Encourage municipalities within the region to expand utilities to potential economic development areas within their jurisdiction. Use state and federal infrastructure development funds to supplement this endeavor.	Inadequate fire protection in rural areas.
All municipalities in the region have a public water system.	There is a lack of funding to extend services to unserved or under-served areas.	Encourage water and sewer providers to expand utilities to areas of the region that need economic development, particularly those areas with low family income and/or high unemployment.	The continued declines in state and federal funding to initiate upgrades and extend water lines.
There is an abundance of water in the region.	Many lines are inadequately sized for future expansion.	Encourage municipalities within the region to expand utilities to potential economic development areas within their jurisdiction. Use state and federal infrastructure development funds to supplement this endeavor.	The lack of water infrastructure and upgrades.
The water supply is adequate at most of the industrial sites.	There is a lack of service planning for a mega-industry.	Encourage water and sewer providers to expand utilities to areas of the region that need economic development, particularly those areas with low family income and/or high unemployment.	



Regional Infrastructure: Water			
Strengths	Weaknesses	Opportunities	Threats
		Encourage municipalities within the region to expand utilities to potential economic development areas within their jurisdiction. Use state and federal infrastructure development funds to supplement this endeavor.	

Regional Infrastructure: Sewer			
Strengths	Weaknesses	Opportunities	Threats
Wastewater treatment is available in many areas including some of the rural communities of Horry and Georgetown counties.	Williamsburg County only has four small wastewater treatment facilities serving mostly incorporated areas. Economic development is restricted to these areas or is forced to use private septic systems.	Encourage water and sewer providers to expand utilities to areas of the region that need economic development, particular those areas of low family income and/or high unemployment.	The continued declines in state and federal funding to initiate upgrades and extend sewer.
There has been a move to the regional concept of wastewater treatment.	The lack of public sewer forces businesses to use septic systems, which in turn restricts the type of businesses that can locate in an area.	Encourage municipalities to expand utilities to potential economic development areas within their jurisdiction. Use state and federal infrastructure development funds to supplement this endeavor.	
Many of the industrial parks have sewer infrastructure in place.	There is a capacity issue in Williamsburg County.		
	Securing funding for expansions and the addition of infrastructure is a challenge.		
	Williamsburg County only has four small wastewater treatment facilities serving mostly incorporated areas. Economic development is restricted to these areas or is forced to use private septic systems.		

Economic Development			
Strengths	Weaknesses	Opportunities	Threats
The region has its own port in the City of Georgetown which is only fourteen miles away from open seas. In addition, the Port of Charleston (the fourth busiest container port on the eastern seaboard) is within an hour's driving distance.	Active environmental lobby and no growth attitude by some.	Use EDA Title IX Loan Funds to assist eligible economic development projects in the region.	Resistance to new industries.
The region is an excellent location for some markets and suppliers such as wood products and chemical manufacturing, among others.	Lack of local programs to provide small businesses with export assistance.	Encourage the use of EDA funds and other funds to assist in the development of the agricultural industry.	Environment lobbying and the union perception of the region.
Low-cost, reliable energy is available.	Lack of regional exposure.	Use EDA funds and other funds to help restore the economy of an area that has been damaged by natural disasters such as hurricanes, floods, tornadoes, fires, etc.	
Trainable workforce and good prevailing wages for the region.	Low educational attainment.	Continue to promote and market designated industrial development sites in the region.	
Affordable cost of living.	Georgetown has a union town perception.	Use EDA Title IX Loan Funds to assist eligible economic development projects in the region.	
Coastal Carolina University, Horry-Georgetown Technical College, Williamsburg Technical College, and Webster University.	Air quality issues in some areas.	Encourage the use of EDA funds and other funds to assist in the development of the agricultural industry.	



Economic Development			
Strengths	Weaknesses	Opportunities	Threats
Numerous trucking services.	Georgetown airport's lack of ILS capability.		
Development of industrial park sites throughout the region.	Lack of direct regional interstate access and a lack of four lane roads.		
Amenities to foster tourism.	Active environmental lobby and no growth attitude by some.		
Natural beauty, an unspoiled environment, and coastal recreation.			
Low taxes and business incentives, including corporate income tax credits and job tax credits.			

Tourism, Leisure, and Recreation			
Strengths	Weaknesses	Opportunities	Threats
A moderate climate and a variety of tourism related activities each year.	Many of the service industry jobs are seasonal, low paying, and lack benefits.	Maximize tourism potential through joint cooperation of local governments.	The growth of alternative tourism venues outside the region.
Two state parks and numerous recreational opportunities.	Lack of additional recreational facilities in the rural areas.	Publicize other recreational activities in the region.	
A moderate climate and various tourism related activities each year.	Lack of funding for future recreational projects.	Utilize Sunday alcohol sale as a marketing tool.	
The region is becoming one of the nation's favorite relocation and retirement spots.	Lack of funding for museums and cultural centers.	Utilize funding from penny sales tax to supplement recreational offerings.	
Economic benefit from the service industry.	Lack of planning for future growth.		
Good parks and recreation departments.	Many of the service industry jobs are seasonal, low paying, and lack benefits.		

Education and Workforce Development			
Strengths	Weaknesses	Opportunities	Threats
Good work ethics throughout the region	Low High School graduation rates	Make every effort to support the development and expansion of the technical colleges and help seek necessary funding to improve region's educational facilities.	Lack of new programs to keep kids in school
Proximity of educational institutions	Lack of comprehensive training in many high schools.	Expand existing tech-prep programs.	
Night classes and outreach programs	Lack of parent and student understanding of career opportunities.		
Skilled training opportunities			
ReadySC available for manufacturing			
Collaboration between high schools, technical colleges, Coastal Carolina University, Webster University, and South Carolina Department of Employment and Workforce			



Quality of Life and Human Resources			
Strengths	Weaknesses	Opportunities	Threats
Healthcare facilities are available throughout the region.	Duplication of services such as fire.	Develop stronger relationships with local representatives in planning for future growth and needs.	Future reductions in federal spending in economic and community development.
Police and public safety services are continuously expanding their capabilities.	Lack of coordination between agencies.		An aging population and insufficient regional infrastructure, such as public transportation.
Fire protection is available in the rural areas with excellent volunteer stations.			
The 911 System is operational throughout the region with county-wide dispatchers.			

Government and Finance			
Strengths	Weaknesses	Opportunities	Threats
Citizen's desire for good and effective government	Lack of joint projects within the counties, towns, and cities.	Develop a unified legislative agenda.	Budgetary shortfalls resulting from reduced tax collections and the tepid recovery.
Commitment to work with local government			Future reductions in federal spending and/or sequestration.
Ability to secure and use federal assistance.			

Environmental and Natural Resources			
Strengths	Weaknesses	Opportunities	Threats
The region has distinguished beaches, an abundance of fresh water, marshes, forests, and farm land.	The scenic river status of the Black River limits development.	Encourage water and sewer providers to expand utilities to areas of the region that need economic development, in particular those areas of low family income and/or high unemployment.	Resistance to region-wide land use and infrastructure planning.
The climate is excellent for year-round recreational activities.	Environmental lobby in the region.	Encourage municipalities within the region to expand utilities to potential economic development areas within their jurisdiction. Use state and federal infrastructure development funds to supplement this endeavor.	
The natural beauty of the region enhances the quality of life.	Lack of zoning in Williamsburg County		
There are two power generating plants in the region.	The competition for the use of farm and forest land for urban development.		
There is an adequate supply of water.	The competition for the use of surface water.		
There are natural resources to support region-wide expansion of existing industry such as timber, gravel, sand, etc.			

Comprehensive Economic Development Strategy for the Waccamaw Region



Chapter IV
**Strategic Direction/
Action Plan**

Georgetown County • Horry County • Williamsburg County

STRATEGIC DIRECTION/ACTION PLAN

PURPOSE

An important part of a comprehensive economic development strategy is defining an overarching vision for the region. In this section, goals and implementation strategies are developed to guide future decision making. The Waccamaw Region's *Comprehensive Economic Development Strategy, 2007* contained an overarching vision statement and a series of regional goals and implementation strategies.

The Waccamaw Regional Council of Governments' economic development staff, working through the CEDS Strategy Committee and WRCOG Board of Directors, reviewed the vision statement and goal in preparation for the 2017 CEDS rewrite. Upon review, it was determined that many of the goals and accompanying objectives were still pertinent. In addition to new goals and implementation strategies developed as part of this plan's rewrite, this section retains many of the goals found in the 2012 CEDS.

REGIONAL VISION STATEMENT

To provide for the sustainable development of the region, local officials, and the public should ensure that:

- The unique natural environment and historic heritage of the region is preserved;
- A stable diversified economy with a viable balance between the industrial, agricultural, and service sectors is achieved;
- The pattern of land uses will achieve the highest degree of health, safety, efficiency, and well-being for all segments of the region;
- The developing areas of the region receive essential utilities and community services that can adequately support future industrial, commercial, and residential growth; and
- A wide range of employment opportunities are available to meet the needs of all the region's citizens.

REGIONAL GOALS AND OBJECTIVES

Georgetown Goal: Focus on Metal-working, chemical, steel production and steel fabrication, light assembly, fabrication of large products transportable by barge, wood products and wood product exports, and value added processes related to bulk materials.

Regional Infrastructure and Transportation

Goal 1.1: Develop a transportation system that fosters growth in designated areas and enhances economic development while maximizing the resources the region has to offer. Cultivate partnerships among the different entities that provide transportation planning



and funding, including FHWA, SCDOT, GSATS, Waccamaw RPO, WRCOG, and the counties' CTCs, to secure benefits for the region.

Objectives:

- Establish priorities based on safety, traffic needs, and economic development potential.
- Support the region's Rural Planning Organization (RPO).
- Coordinate economic development with transportation planning.
- Develop a long range plan to upgrade and construct new rural roads and bridges.
- Seek funding from all funding sources, local, state, and federal, to support the I-73 project.
- Support the planned projects and new projects that would connect the region to the rest of the country including, but not limited to, support for the construction of the Andrew's Bypass (Phase II) and the widening of US 521.
- Provide increased support for the Port of Georgetown and promote its long-term viability by helping to secure funding to dredge the shipping channel.
- Obtain community-wide support for improvements to the Georgetown County Airport to obtain ILS capability, and support plans for continued improvement to the Myrtle Beach International Airport.
- Promote and support the rail system and the provision of additional spurs, as needed, to promote economic development.
- Encourage the development of regional transit facilities/services.

Goal 1.2: Water infrastructure in the region must be maintained, upgraded, and expanded to provide potable water and fire protection to all citizens, as well as provide the capacity to accommodate present and future economic development needs and growth.

Objectives:

- Seek funding for new water systems, upgrades, and expansions.
- Continue to encourage and support regionalization and the consolidation of water systems.
- Encourage maintenance and repair in a timely manner.
- Encourage cooperation between system operators.

Goal 1.3: The region's wastewater treatment infrastructure must be maintained, upgraded, and expanded to serve the region's citizens and accommodate present and future economic development.

Objectives

- Seek funding in the form of grants and low-interest loans to provide affordable waste water collection.

Chapter IV Strategic Direction/Action Plan

- Continue to encourage regionalization.
- Review population projections and industry needs periodically for potential capacity restructuring and/or redevelopment.

Goal 1.4: Encourage the expansion of natural gas systems in the region while maintaining and improving existing systems.

Objectives

- Seek local, state, and federal funding to subsidize expansions.

Goal 1.5: Encourage the enhancement of hazardous and solid waste management, refuse collection, and disposal services provided by local governments and private contractors in an effort to meet existing and future industrial and economic development needs.

Objectives

- Seek funding for implementing and updating each county's solid waste management plan.
- Continue to encourage composting, recycling, reduction, and reuse of solid waste as an alternative to land filling.
- Encourage the reduction in solid waste going into landfills.
- Continue to explore Howard LLC's new composting process.
- Support the state's anti-litter campaign.

Economic Development

Goal 2.1: Encourage commercial and industrial growth which will provide the region's population with economic opportunities and enhance the quality of life for both businesses and residents

Objectives:

- Explore recruiting industry clusters.
- Be proactive in preserving prime industrial and prime agriculture land by designating areas for economic development activities.
- Continue to identify potential industrial sites and buildings throughout the region.
- Continue to develop speculative building in the region's industrial parks.
- Promote and expand the Revolving Loan Fund (RLF) program for rural small businesses and industries.
- Recruit environmentally friendly industries that provide a good mix of job skills. Develop plans for agriculture centers.
- Identify available venture capital needs.
- Provide the necessary infrastructure to support growth and economic development.
- Become proactive about the union perception.



- Form a telecommunications task force of local citizens to pursue state of the art communication services throughout the region.
- Promote the area's top quality work and living environments.
- Secure private sector funding to assist in economic development programs.
- Prevail upon the Chambers of Commerce to step up and undertake an entrepreneurial development program and small business assistance effort in conjunction with the EDC.
- Regularly update identified economic development goals to ensure continuity of programs.
- Support economic diversification through recruitment efforts that target industries offering higher wages.
- Encourage the clustering of business and industry by identifying and developing sites for corporate activities. Research and develop industrial parks, in partnership with private landowners and developers.
- Develop a forum for businesses to discuss local trends, threats, and opportunities.
- Continue efforts to recruit international companies that are either expanding or seeking a presence in the United States.
- Encourage the development and expansion of regional economic development partnerships.

Tourism, Leisure, and Recreation

Goal 3.1: Develop and improve recreational facilities, community parks, recreation centers, cultural and art centers, and biking and walking trails that are accessible to residents of all ages and physical conditions. Recreational and cultural activities enhance the quality of life and promote economic development opportunities in a region.

Objectives:

- Improve recreational opportunities for all citizens.
- Coordinate special events and festivals throughout the region to avoid conflicting schedules.
- Upgrade cultural, sports, and entertainment infrastructure.
- Identify tourist attractions, not only in the cities and towns but also within rural areas and smaller communities.
- With the region becoming a retirement destination, provide recreational and cultural activities to fit the needs of the elderly.
- Provide local protection for historic sites that the South Carolina Department of History and Archives may not list on their registry.
- Develop plans for conferences at civic center locations other than the beach.

Chapter IV Strategic Direction/Action Plan

Education and Workforce Development

Goal 4.1: Develop an education system with highly skilled educators and promote curriculums with linkage between industry and educational institutions. Provide adequate educational facilities for the region's growing student population.

Objectives:

- Continue to seek funding for K-12 school systems.
- Establish a periodic meeting to discuss projections of future educational facilities.
- Promote and develop partnerships between industry and education.

Quality of Life/Human Resources

Goal 5.1: Develop a regional environment that protects the health, safety, and welfare of its citizens by enhancing the effectiveness of law enforcement and other public protection systems.

Objectives:

- Evaluate current technical systems for usability.
- Ensure adequate resources are available for law enforcement agencies.
- Increase citizen involvement in their communities through crime prevention and neighborhood watch programs.
- Provide the area's public safety services, i.e. E911, Police Department, Fire/Rescue, Sheriff's Office, Detention Center, and the Judicial System, with comprehensive integrated technology solutions.
- Obtain more funding for training of local law enforcement officials and increase training at all staff levels.

Environmental and Natural Resources

Goal 6.1: The protection of the Waccamaw Region's beaches, marshes, rivers, wetlands, and other natural resources are paramount in maintaining the area's scenic beauty and quality of life. Economic development initiatives should consider their impact on the area's natural resources.

Objectives:

- Support the area's 208 Water Quality initiatives and encourage continued collaboration between public and private interests in ensuring the quality of the region's waters is maintained.
- Encourage the consideration of environmental sensitive areas in the preparation of local comprehensive plans and zoning.
- Protect the area's floodplains and floodways from encroachment.



- Support beachfront management initiatives and the efforts of the US Army Corps of Engineers in beach re-nourishment.
- Consider natural constraints in the placement of industrial parks and infrastructure.
- Encourage mitigation where warranted.

Government and Finance

Goal 7.1: Encourage and improve cooperation between local governments to foster greater efficiency in the management of personnel, finances, programs, and services.

Objectives:

- Improve communication between local governments.
- Encourage more public hearing notification to gain greater citizen participation in the decision making process.
- Continue to recognize the importance of planning for all communities, including but not limited to land use, transportation, infrastructure, environment, and training.
- Develop regional planning activities and initiatives that guide future growth and economic development efforts.

Action Plan: Implementation

- An outline of the steps required to take each selected high-priority activity from inception to successful completion;
- A roster of key individuals and institutions that will be responsible for implementing and supporting these steps;
- A reasonable estimate of the costs associated with implementing the activity;
- A list of the integrated funding sources (public, private, and nonprofit) to support the costs; and
- A realistic time frame for execution (i.e., implementation schedule), with relevant benchmarks and performance measures that speak to overall impact.
- What are the activities and what are their expected benefits?
- Which activities address the area's greatest need or best enhance the region's competitive advantages?
- Do these activities represent the best use of limited resources?
- Will the activities have positive economic, environmental, and social impacts and how can these be measured?
- Will the activities contribute to the overall economic resiliency of the region?

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Comprehensive Economic Development Strategy for the Waccamaw Region



Chapter V
Evaluation Framework
&
Performance Measures

Georgetown County • Horry County • Williamsburg County

EVALUATION FRAMEWORK AND PERFORMANCE MEASURES

RELATIONSHIP TO LOCAL PLANS

Title 6, Chapter 29 of the South Carolina Code of Laws requires the comprehensive plans for local communities to incorporate an economic development element and priority investment element. These elements identify priority projects needed to, among others, foster economic development. Many of the region's nineteen units of local government have adopted comprehensive plans which identify economic development and infrastructure projects. In addition, a few communities, such as Horry and Georgetown counties, have adopted capital improvement plans (CIP) which likewise provide project listings.

The comprehensive plans and available CIPs from the various jurisdictions were reviewed in preparation for this CEDS. The listing provided in Table 14 is intended to identify projects of regional significance. Where not in conflict with this plan, initiatives at the county or municipality level should consider, in addition to projects listed in Tables 15, 16, and 17, those identified by each jurisdiction's comprehensive plan and CIP.

EVALUATION

The evaluation portion of this plan will be an ongoing planning process which will be the responsibility of the economic development organization staff under the guidance of the CEDS Strategy Committee. This section will look at the economic activities that were accomplished during each year as compared to those proposed under the CEDS program.

Key economic development representatives from each county will be asked for an assessment of their county's accomplishments in regards to those proposed in the strategies and implementation portions of the CEDS document. WRCOG staff and, most importantly, the CEDS Strategy Committee will annually review the economic development activities of each county in terms of jobs created, unemployment rate, private and public investment, and other relevant factors to determine the level of performance in regards to this plan.

The CEDS Strategy Committee will review both the long-term and short-term goals and objectives of the plan and may expand or delete portions as necessary. This will be a direct result of a change in the economy, availability of public and private funds, policy changes within each county or the region, and other relevant changes. Short-term goals and objectives should change annually whereas long-term goals should change less often. This will be the responsibility of the committee with the assistance of other economic development districts, consultants, and university centers.



Chapter V. Evaluation Framework & Performance Measures

****S.M.A.R.T. goals = specific, measurable, achievable, results-focused, and time-bound****

Standards for evaluating each project will include the Economic Development Administration's investment policy guidelines:

- Can the measures be evaluated in an objective, timely, and cost-effective fashion?
- Are the measures focused on an outcome or result (i.e., data and information on the success of a specific process or engagement) rather than an output or activity (i.e., data or information on activities to help achieve an outcome)?
- Do the measures include a clear statement of the results expected?
- Do the measures support regional goals?
- Do the measures allow for meaningful trend or statistical analysis?
- Are the measures challenging but at the same time attainable?
- Are assumptions and definitions specified for what constitutes satisfactory performance?
- Have those who are responsible for the performance being measured been both identified and fully involved in the development of the measures?
- Are the measures tracking trends that are completely within the region's control or will national or global developments impact performance?

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Comprehensive Economic Development Strategy for the Waccamaw Region



Chapter VI
**Strategic Projects,
Programs, and Activities**

Georgetown County • Horry County • Williamsburg County

STRATEGIC PROJECTS, PROGRAMS, AND ACTIVITIES

Priority Regional Projects

Listed below are the priority economic development programs and projects for the region and member counties. These projects have been reviewed by the CEDS Strategy Committee and correspond with the economic development goals outlined in Chapter V. Many of the projects identified in the 2007 CEDS remain unrealized and, as such, are retained by this plan’s update.

For each priority program or project, a timeframe is provided which identifies the most likely scenario for achieving implementation: Short-term projects are those in which funding could exist for implementation within a one to two-year period; Medium-term projects includes those with an implementation outlook of two to five years; and, Long-term projects are those with a time horizon of five years or greater:

Priority Regional Projects				
Projects	Cost	Funding Source	Responsible Entity	Time Frame
I-73	\$1.5 to 2.0 billion	US, SC, Local	SC DOT	Long-Term
US 521: 4 lane from Andrews Interstate 95	\$275 million	US, SC, Local	SC DOT	Long-Term
US-378: 4 lane from Conway to Interstate 95	\$275 million	US, SC, Local	SC DOT	Long-Term
US 701: 4 lane from SC-51 to Conway	\$187 million	US, SC, Local	SC DOT	Long-Term
US 701: Connector/SELL	\$300 to 600 million	US, SC, Local	SC DOT	Long-term
US 701/521: Georgetown Bypass	\$90 million	US, SC, Local	SC DOT	Long-Term
Coast RTA: Multi-Modal Facility and Signage	\$20 million	US, SC, Local	SC DOT	Medium-term
SC-261: 4 lane from Yahannah to Manning	\$315 million	US, SC, Local	SC DOT	Long-Term
SC-41: 4 lane from Mullins to Andrews	\$325 million	US, SC, Local	SC DOT	Long-Term
I-74: Carolina Bays Parkway	\$95 to 641 million	US, SC	SC DOT & NC DOT	Medium-/Long-Term
US 17: Improvements	\$150 million	US, SC, Local	SC DOT	Medium-/Long-Term
US 501: Widening & Improvements	\$160 million	US, SC, Local	SC DOT	Medium-/Long-Term



Priority Local Projects

Priority Local Projects					
Priority Georgetown County Projects					
Projects	Cost	Funding Source	Responsible Entity	Performance	Time Frame
Seeking funding to expand water to rural areas	N/A	GCWSD, USDA, CDBG, Local	GCWSD, Georgetown County		Long-Term
Establish 17 South Industrial Park	N/A	Local	Georgetown County		Medium-Term
Small Business Engagement	N/A	Local, State, EDA	Georgetown County		Medium-Term
MPW Industrial Services – Industrial Water Regeneration Plant	\$10 million	Local	Georgetown County		Medium-Term
Mercom expands existing operations	\$6 million		Georgetown County		Medium-Term
HGTC Advanced Manufacturing Center			HGTC, Georgetown County		Medium-Term

Priority Horry County Projects					
Projects	Cost	Funding Source	Responsible Entity	Performance	Time Frame
Expand Water and Sewer Systems	\$7.5 million	USDA, CDBG, Local	Horry County, GCWSD, BWS, NMBW&S		Long-Term
Airport Expansion 14 Gate Terminal	\$130 million		Horry County/City of Myrtle Beach		Short-Term
Corman Railroad	N/A		Horry County		Short-Term
HGTC Advanced Manufacturing Center			HGTC, Horry County		Medium-Term

Priority Williamsburg County Projects					
Projects	Cost	Funding Source	Responsible Entity	Performance	Time Frame
Continue to provide sewer expansion		USDA, CDBG, Local, EDA	Williamsburg County		Long-Term
Continue to expand County water system		USDA, CDBG, Local, EDA	Williamsburg County		Long-Term

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Comprehensive Economic Development Strategy for the Waccamaw Region



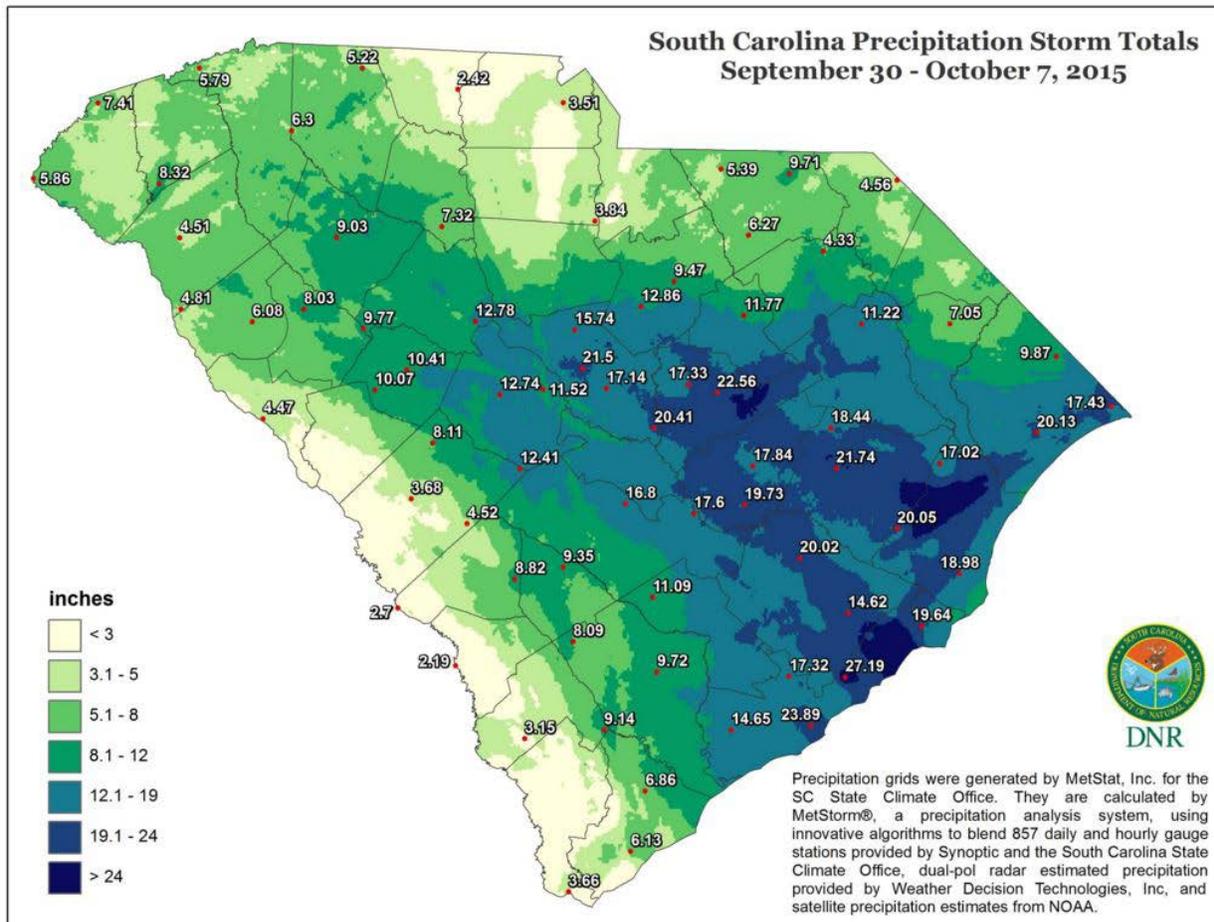
Chapter VII
Economic Resiliency

Georgetown County • Horry County • Williamsburg County

ECONOMIC RESILIENCY

Regional Overview: Waccamaw Region Economic Resilience

In October of 2015 South Carolina experience a historic rainfall and flooding event that stemmed from a low-pressure system that funneled tropical moisture from Hurricane Joaquin. As a result, an estimated 52 dams statewide were impacted and over 541 roads were closed. Some of these roads even collapsed due to the massive amount of flowing water.

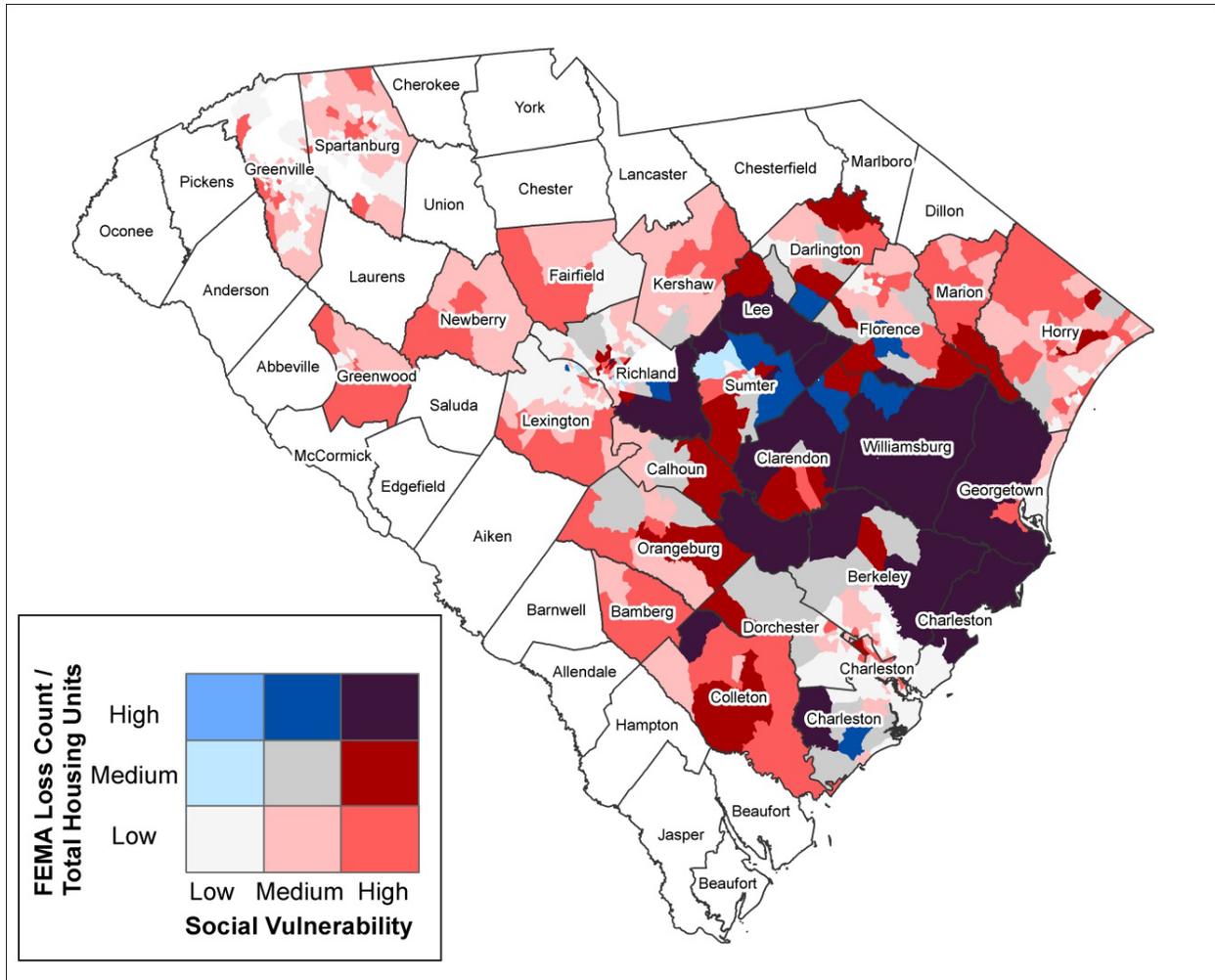


Source: South Carolina Action Plan for Disaster Recovery

This map displays the incredible amount of rainfall; the Waccamaw Region was among the most severely impacted, with some areas receiving almost 2 feet of rain in a week. What made this event even more severe was its impact on our most vulnerable populations. Georgetown and Williamsburg Counties were the places in most need of aid after looking at the amount of damage along with their social vulnerabilities. Williamsburg County is a designated Persistent Poverty County and also has over 41% of its population living in mobile homes. These mobile homes are prone to more damage and also much harder to repair than single family homes. When the impacts of poverty



and race, a lack of wealth, and the percent of age dependent population (children under the age of 5 and adults over the age of 65) are also added to the equation Georgetown and Williamsburg Counties were the most vulnerable and devastated area in the state, as seen in the map below.



Source: South Carolina Action Plan for Disaster Recovery

In total, this disaster disrupted business up to 6 weeks in some areas. In response to this event local VOADs (Winyah Bay VOAD – Georgetown and Williamsburg Counties, Waccamaw VOAD – Horry County) developed Long Term Recovery Groups to guide the process of rebuilding as well as setting up a framework to aid in recovering in a faster manner in the future.

Before this flooding event, the last major disaster to affect the Waccamaw Region was Hurricane Hugo in 1989. Damage from Hurricane Hugo in South Carolina was estimated at \$5.9 billion, which ranks as the strongest and costliest hurricane in the history of the state. There were also 35 related deaths. More recently, in 2014 there was a significant ice storm that affected the area. South Carolina was declared a disaster

Chapter VII. Economic Resiliency

area and two and a half years or 11% of the states timber was lost. \$360 million in damages made it the worst storm since Hurricane Hugo. Foresters were able to salvage 15% of the timber and 10% of the value.

Climate Change and Economic Resiliency

The National Climate Assessment predicts average temperatures to increase by 4 to 8 degrees by 2100. This climate change will bring sea level rises and increased vulnerability to flooding, especially our low-lying coastal areas. Issues such as storm surge, beach erosion, and reduction of wetlands will have a significant impact on not only the tourism industry but also our agricultural industry due to salt-water intrusion. The increase of temperature by a few degrees will also increase the number of algae blooms, increase the number of bacteria that could infect humans via shellfish, and decrease yield on crops such as dairy, corn, cotton, soybeans and rice. Economic resiliency will become more important in the coming years as our economy and climate change over time. The Waccamaw Region continues to implement new mitigation plans and other emergency management strategies to recover from, withstand, or avoid shocks to the environment and economy.

Mitigating the Impacts of Future Storm Events on the Waccamaw Region's Economy

Georgetown County is StormReady and TsunamiReady. The National Weather Service manages both of these programs. The StormReady program helps arm America's communities with the communication and safety skills needed to save lives and property during severe weather events. The TsunamiReady program, which was modeled after the StormReady program, helps communities minimize the risk posed by tsunamis through better risk assessment, planning, education and warning communications. Prince George, Camden Creek at Allston Plantation, and DeBordieu are three of only 23 communities in South Carolina that are recognized as Firewise Communities. The Firewise Communities Program encourages local solutions for safety by involving homeowners in taking individual responsibility for preparing their homes from the risk of wildfire. Georgetown County has multiple hazard mitigation plans in place including: expanding current Geographic Information Systems, encouraging wind-resistant design techniques in new residential construction, new dunes program that will reduce flooding and storm impact, and continued efforts to educate the public with educational materials, advertising and promoting the availability of flood insurance, and coordinating Emergency Operations Center activities/drills that encourage citizens to become more prepared. Georgetown County Emergency Management also trains



volunteers through their CERT Program and coordinates evacuation drills.

Horry, Georgetown and Williamsburg counties have a very detailed comprehensive emergency management Georgetown and Williamsburg counties. Their comprehensive plan breaks down into six sections. The first is preparedness which discusses required training, exercises, and public information, including an outreach plan. The second section is response which involves emergency operations plan and the logistics plan. Recovery is the next section and this is where their short-term recovery plan is laid out. The fourth section is mitigation. In this section they discuss mitigation strategies for anything ranging from storm surge to cyberterrorism. After that is the continuity of operations plan and the final section includes hazard or function specific plans. Horry County Emergency Management runs a very active Facebook page in coordination with their plans to engage with the local community. Horry County also has a VOAD (Volunteer Organizations Active in Disasters) organization and has designed plans for readily accessible facilities and Disaster Recovery Centers where citizens may go for information on assistance programs run by FEMA or the SBA.

Williamsburg County has a very detailed and goal-oriented hazard mitigation plan to become a more resilient community as well. The four major goals of their mitigation plan are:

- Williamsburg County has no significant disruption in the functioning of the County's infrastructure and the continuity of local government operations in the face of a disaster.
- Williamsburg County is capable of initiating and sustaining emergency response operations during and after a disaster.
- Williamsburg County and incorporated towns are capable of developing, implementing, and maintaining effective mitigation programs.
- All sectors of community work together to create a disaster resistant County.

This plan includes a long list of action items such as: strengthening utility poles/conductor fixtures, establish procedures for construction or provision of "storm shelters", installing a flash flood warning system, conducting an engineering study on wind vulnerability of critical facilities, and researching the feasibility of tax relief/financial incentive program to encourage neighborhood residents or property owners to retrofit buildings. Williamsburg County received a grant in April 2015 from FEMA to update their hazard mitigation plan.

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Comprehensive Economic Development Strategy for the Waccamaw Region



Chapter VII
Appendices

Georgetown County • Horry County • Williamsburg County

Appendices

Appendix A

References

Georgetown County

Georgetown County School District

Georgetown County Economic Development Alliance

Horry County School District

Myrtle Beach Regional Economic Development Corporation

South Carolina Office of Research and Statistics

South Carolina Department of Commerce

South Carolina Employment Security Commission

U.S. Census Bureau

U.S. Department of Labor

Williamsburg County Economic Development Board

Williamsburg County School District

Myrtle Beach Economic Outlook Board

Appendix B

Waccamaw Regional Council of Governments

Board of Directors

Board Member	Representative County
Rep. Carl L. Anderson	Georgetown County
Hon. Frank McClary	Georgetown County
Mr. Jerry Oakley	Georgetown County
Mr. Johnny Morant	Georgetown County
Mr. Murray Vernon (Vice-Chairman)	Georgetown County
Ms. Peggy Wayne (Treasurer)	Georgetown County
Hon. Alma White	Georgetown County
Hon. Barbara Blain-Bellamy	Horry County
Rep. Heather Crawford	Horry County
Mr. Cam Crawford	Horry County
Ms. Jean Dozier	Horry County
Rep. Russell Fry	Horry County
Mr. Paul McCracken	Horry County
Mr. Leslie McIver, Sr.	Horry County
Hon. Robert F. Childs	Horry County
Mr. W. Paul Prince	Horry County
Hon. John Rhodes	Horry County
Ms. Jean Timbes	Horry County
Mr. Randal Wallace (Chairman)	Horry County
Hon. Charlie Fulton	Horry County
Mr. Harry Huggins	Williamsburg County
Mr. J. Yancey McGill (Secretary)	Williamsburg County
Mr. Andy McKnight	Williamsburg County
Senator Ronnie A. Sabb	Williamsburg County
Hon. Darren Tisdale	Williamsburg County

Appendix C

Waccamaw Regional Council of Governments

CEDS Committee

Board Member	Affiliation and Title
Andy Roberts	Agru America, Corporate Purchasing Manager
Jan Harper	Tidelands Health, Senior VP and CHRO, Human Resources
Rochelle Geathers	Wal-Mart, Front End Manager
LeGrande Dorman	Carolina Food Service, President
Josh Fiorini	PTR Industries, CEO
Peg Skalican	Pittsburg Institute of Aeronautics, Campus Director
Lance Thompson	Ocean Lakes Family Campground, General Manager
Henry Poston	Palmetto Synthetics, President
Chris Battle	Personal Touch Beauty and Barber College, President
Verlon Wulf (Chairman)	Carolina Cool, President Registered Apprenticeship
Sherrill Walker Smith	Georgetown Container Division IP, Executive Administrator
Wilhelmina Pressley	The Williamsburg Co. Education Faculty Association, Hemingway High School
Wallace Evans	A Father's Place, Executive Director
Greg Mitchell	Horry Georgetown Technical College, VP of Continuing Education
Etta Greene	Horry County Adult Education, Director
Brian Tucker	Georgetown Economic Development, Director
Kim Burke	SC DEW, Regional Manager

Appendix D

South Carolina Letter of Concurrence



Henry McMaster
Governor

SOUTH CAROLINA
DEPARTMENT OF COMMERCE

Robert M. Hitt III
Secretary

October 3, 2017

Mr. Lee H. Mertins, Program Specialist
Economic Development Administration
Capacity Development Division
401 West Peachtree Street, NW, Suite 1820
Atlanta, GA 30308

Dear Mr. Mertins:

The Comprehensive Economic Development Strategies (CEDS) process is one that should be used to set regional direction and provide focus. The Economic Development Administration (EDA) continues to do an excellent job in establishing the guidelines and procedures that oversee the CEDS process.

As the entity within the South Carolina Department of Commerce charged with reviewing the CEDS for each Regional Council of Governments in our state, we can say without question that the strategies presented do, in part, represent the needs of the individual regions. Their response to your challenge is consistent with the diverse needs of their respective areas.

I am, with this correspondence, submitting this letter of concurrence on behalf of the Waccamaw Regional Council of Governments acknowledging that, in our opinion, their CEDS is consistent with the instructions that EDA has provided.

Sincerely,

A handwritten signature in cursive script that reads "Maceo Nance" with a circled "u" at the end.

Maceo Nance, Director
Small Business and Rural Development

cc: Tomas J. Langley

Appendix E

Minutes
Waccamaw Workforce Development Board
Waccamaw Regional Council of Governments
 1230 Highmarket Street
 Georgetown, South Carolina
 May 16, 2017
 9:30 AM

Members Present		Members Absent	
Christopher	Battle	Josh	Fiorini
Kim	Burke	Rochelle	Geathers
Etta	Greene Carter	Wilhemina	Pressley
David	Edwards	Lance	Thompson
Wallace	Evans	Sherill	Smith
Jan	Harper	LeGrande	Dorman
Greg	Mitchell		
Henry	Poston		
Andy	Roberts		
Peg	Skalican		
Brian	Tucker		
Verlon	Wulf, Chairman		

Waccamaw Regional COG Staff Present.

Cathy Archer, Rusty Gaskins, Ayla Hemeon, Kim McCutchen, Marsha Platt, Amy Ross, Fred Smith and Sarah Smith

SC DEW Staff Present.

Egypt Bey, SC DEW Representative

- **Call to Order.**

Verlon Wulf, Chairman called the meeting to order at 9:30 a.m.

- **Welcome and Introduction of Guests.**

Mr. Wulf welcomed members, staff and guests. Mr. Wulf had board members, staff and guests introduce themselves.

- **Determination of Quorum.**

Mr. Wulf confirmed there was a quorum.

- **Approval of Minutes.**

Gregory Mitchell motioned to approve the minutes from the February 16, 2017 meeting. Henry Poston seconded the motion and it was passed unanimously by the Board.

- **RFP Committee Recommendations of One Stop Operator.**

Mary Ann Lawrence presented the recommendations for the RFP Committee Recommendations of the One Stop Operator. She reported that only one proposal was received which was from Ross Innovative Employment Solutions. The committee reviewed the proposal to see if it was in compliance and found that it was. The proposal is comprehensive. The proposal is for \$84,500 which will include a full-time employee for the three county region. The company will profit \$3960. The contract will be for 1 year with a Board option to renew for up to 3 years. The full-time One Stop Operator will be responsible for facilities management and partner management within the One Stop Centers. The Operator will also provide a monthly tracking report.

Waccamaw Regional Council of Governments did not submit a proposal to avoid any possible appearance of conflict of interest.

Henry Poston made a motion to approve the RFP committee recommendation for the One Stop Operator. Brian Tucker seconded the motion and the Board approved.

- **CEDS Update/Workforce Board Role.**

Sarah Smith updated the Board on the role of the Comprehensive Economic Development Strategy (CEDS) Committee. Due to the CEDS Committee's focus economic development, it was requested that the Board serve as the CEDS Committee as it is beneficial for workforce development and economic development to work together. The CEDS Committee will investigate labor migration and trends in economic development that affect workforce needs.

- **Financial Report.**

Cathy Archer, WIOA Fiscal Coordinator, presented financial reports, first on the funding status as of April 30, 2017 for adult/DW and youth programs. Adult program expended 46% and Dislocated worker expended 38% of funds She explained that the adult spending is low due to an increase in local employment (trending the over the last 3 years). The Youth program has expended 72% of funds as of April 30, 2017.

Ms. Archer informed the Board that an IWT grant has been received for disaster relief from Hurricane Matthew. The funds will be used for Georgetown County to hire a coordinator to assist with the disaster relief in the county. The guidelines of the grant requires that the individual be a WIOA participant.

Ms. Archer shared that \$87,214 in grants has been awarded to business for the incumbent worker training. She explained that up to 10% of WIOA Adult/DW funds can be spent on Incumbent Worker Training. The IWT is beneficial because although WIOA adult/DW enrollment is down due to an improved job market, the IWT grant funds helps business train their employees.

Request for Local IWT Layoff Aversion Funds.

Kim McCutcheon, Business Services Representative, request local IWT layoff aversion funds in the amount of \$49,720 for Precision Southeast. The training is for 35 employees which would result in credentials in 6 areas of training. The training would be provided by SC Manufacturing Extension Partnership and would be from June/July 2017 to January 2018. The state has already reviewed and approved the training. Ms. McCutcheon

requested approval from the Board. Henry Poston motioned to approve the request. It was seconded by Brian Tucker and the motion was carried as the board approved.

- **Performance Report.**

Amy Ross, Performance and Compliance Manager, provided the performance report. She noted that she is not able to report performance at this time as the new parameters have not been configured in the SCWOS system yet.

- Program Year 2016 (July 1, 2016- April 30, 2017) Enrolled and Served - Enrolled 179 adults, 20 dislocated workers, 125 youth. Serving 357 adults, 88 dislocated workers and 270 youths.
- SCDEW Traffic Report for Program Year 2016 July-April 2017: Georgetown 6916, Horry 14654, and Kingstree 7049.

- **WIOA Update.**

Ayla Hemeon reported that the State has approved the local plan and that they are currently awaiting the official notice. Starting in March WIOA collaborated with the Georgetown County School District on an employability initiative. Paris Singleton, the Career and Technology Education CATE Director, pulled students who were completing their programs of study this school year to participate. Georgetown, Andrews, and Carvers Bay high schools took advantage of this program. WIOA business services reps went to the 3 high schools once a week for 5 weeks and worked with them on interviewing skills, business etiquette and helped them prepare resumes. On April 6, the students came to the district building where they met with local employers and held mock interviews. The employers were also able to give feedback to the students after the interviews. Employers were very pleased with the interviewing skills of the students. We are planning to do the same initiative next year and employers have already asked to be a part of it.

Ms. Hemeon updated that a more professional and cost-effective office building for the Georgetown SC Works office may have been acquired. The building is located on Main Street on 17N and Church Street. Currently the lease is being negotiated and there is hope to be moved in by June 30, 2017. She also shared that they are looking for a space in Kingstree as well.

- **Adjournment.**

There being no further business Mr. Wulf adjourned the meeting at 10:00 a.m.

Respectfully Submitted,



Verlon Wulf
Chairman

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Bake Sale and Silent Auction.
Friday BBQ plates 11a-2p \$8.00
Please no pets. See church
website www.tbcmf.com
for more info.

Animals

Pets

POODLE Pups CKC Toyside minis,
shots/worm, Happy & Home Raised
M \$300. 843-421-0632

Real Estate

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countertops, new floor, central

Camping/Motorhomes

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Briardlife RV Resort Membership
\$1000 + Transfer fee.
804-596-3035

Briardlife RV Resort Membership
\$900 + transfer fee.
804-315-0863

Automotive

Automobiles

2008 BMW 650i Silver/Black
convertible, garage kept, 4.8L 300
HP, 6 speed manual, new clutch,
tires & dash, clean title & Carfax,
fully inspected, excellent
condition, 48,300 miles \$23,448
OBO, Motivated seller
843-251-9800, jgrover@sc.rr.com

2009 Sebring Convertible,
Silver, 91k miles, excellent cond. \$7700
OBO Chuck 843-273-4600

2013 Chevy Sonic Hatchback 4dr,
exc. cond., 27,500 mi, 1-owner,
\$7,700 Car. Shares 910-575-3892

Ford Taurus 2002 SES Silver/Gray
Leather, CD, remote, garaged,
123k miles, \$800 770-335-5354

Nissan Sentra 2005 SE-R



Silver/Gray Sweet 2005 Nissan
Sentra, 4-door, silver in color, grey
interior, clean, great car,
dependable, new battery, good
carpet and seats, sunroof driver,
very good mechanical condition,
1 yr. old tires, 122k miles, Carfax
history, \$3,505.122.465/miles
435-229-8123, CALL/TEXT

Subaru Forester 2009 2.5 X L.L.
Bean Edition Silver/Black 2009
Subaru Forester L.L. Bean model.
Vehicle is in excellent condition
and fully loaded with leather
seats, towing package, and
includes a lifetime paid
subscription Sirius XM satellite
radio. 79,412 miles \$9,500
843-458-0019, djc301@aol.com

Legals & Public Notices

protecting resides in the same county
where the proposed place of business is
located or within five miles of the busi-
ness, and, (5) the name of the applicant
and the address of the premises to be li-
censed. Petitions must be mailed to: S.C.
Department of Revenue ATTN: ADR, SEC-
TION P.O. Box 125 Columbia, SC 29214-
0907 or faxed to: (803) 895-0110.

NOTICE OF SUMMONS

STATE OF SOUTH CAROLINA, COUNTY OF Horry, IN THE COURT OF COMMON PLEAS, C.A. NO.: 2017-cv-207-03407, Thomas Concrete of South Carolina, Inc. Plaintiff vs. Keith E. Marcous alias KEM Contracting and Kristal Rogers, as Personal Guarantor, Defendants, SUMMONS. TO THE DEFENDANTS ABOVE-NAMED: YOU ARE HEREBY SUMMONED and required to answer the Complaint herein, a copy of which is herewith served upon you, and to serve a copy of your Answer to this Complaint upon the subscribers at their office, 704 East Mottes Avenue, Greenville, South Carolina 29601, within forty (40) days after the service herof, exclusive of the day of such service, and if you fail to answer the Complaint within the time aforesaid, the Plaintiff in this action will apply to the Court and judgment by default will be rendered against you for the relief demanded in the Complaint.

KENNON DUDLEY & CRAWFORD, LLC, s/Mark A. Biles, Jr., John T. Crawford, Jr. (SC Bar #9882) Mark A. Biles, Jr. (SC Bar #101024), 704 E. McBee Avenue, Greenville, South Carolina 29601, Telephone: (854) 242-4820, Facsimile: (854) 242-4844, mkdudley@combs.com, biles@combs.com, Counsel for Plaintiff, June 20, 2017.

PUBLIC NOTICE

2017 - 2022 Waccamaw Region Comprehensive Economic Development Strategy

The Waccamaw Regional Council of Governments (WRCOG) is the project administrator for the Waccamaw Regional Comprehensive Economic Development Strategy (CEDS). The CEDS is a document that is designed to bring together the public and private sectors in the creation of an economic roadmap for the region with the purpose of diversifying and strengthening the regional economy. WRCOG has prepared an initial draft document available for review and comments from September 08, 2017 through October 09, 2017. This document will be available for review at the WRCOG main office, 1230 Highway 202, Georgetown, SC 29440. The office is open Monday through Friday from 8:00am to 5:00pm. If you have any questions or concerns please contact Tommie Langley or Tom Strick at (843) 546-8500.

Nations rush to help ravaged islands

Hurricane Irma

The Associated Press

PORT-AU-PRINCE, Haiti — French, British and Dutch military authorities rushed aid to a devastated string of Caribbean islands Thursday after Hurricane Irma left at least 11 people dead and thousands homeless as it spun toward Florida for what could be a catastrophic blow this weekend.

Warships and planes were dispatched with food, water and troops after the



The county will also serve as an evacuation destination for the coast, James said.

The state is faced with four possible storm scenarios, James said.

The one with the greatest chance of occurring — 50 percent probability — calls for the storm to make landfall near the South Carolina/Georgia border as a Category One storm and head north from there.

That would bring potential tornado threats with it

of occurring — 30 percent — would have the storm track up the spine of Florida and then split South Carolina on its way through. It would bring about similar statewide effects.

The other two scenarios have a 10 percent chance each of taking place. One would have the storm go up the western coast of Florida and into western South Carolina and would have a decreased effect on the state.

in a Thursday morning bulletin on the storm. "Also, the error cone is not an

Morning News reporter Joshua Lloyd contributed to this report.

FLORENCE COUNTY SOLID WASTE FULL COST DISCLOSURE 2016-2017

The Solid Waste Policy and Management Act of 1991 and The Solid Waste Grant Regulation (R.61-107.2) requires full cost disclosure of the costs associated with solid waste management.

	Total Annual Cost	Cost per Capita
Solid Waste Collection	\$2,468,583.41	
Solid Waste Disposal	\$1,875,851.63	
Recycling/Composting	\$206,039.57	
Other SW Activities	0	
TOTAL COST	\$4,558,465.61	\$32.80

McMaster says evacuations may be needed Saturday

The Associated Press

COLUMBIA — South Carolina Gov. Henry McMaster could order coastal residents to evacuate their homes starting Saturday morning.

Any order would correspond to lane reversals on several major highways,

he'll issue an order, but what counties will be included. Details will depend on the latest forecasts, he said, but a "full coastal evacuation" is possible.

McMaster did order 143 health care facilities along South Carolina's coast to evacuate their patients. That executive order signed Thursday after-

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8/27/2017

Next Miss America could be pilot, governor, alpaca farmer

Weather Georgetown Times Forecast



Forecasts and graphics provided by:
©2017, The Weather Company, LLC

BY WAYNE PARRY

Telephone (843) 545-3339. Williamsburg County Town Residents please contact your local Voter Registration Office in Kingstree.

This is a nonpartisan election, and no party affiliation shall be placed on the ballot. The polls shall open at 7:00 a.m. on Election Day and close at 7:00 p.m.

Registered electors who cannot vote in person may be eligible to vote by absentee ballot. Persons wishing more information concerning absentee voting should contact the County Board of Voter Registration and Elections (843-545-3339).

At 9:00 a.m. on said Election Day, the poll managers of the Absentee Precinct will begin examining the absentee ballot return envelopes. This examination will be held at the Georgetown County Voter Registration Elections Office, located at 303 North Hazard Street, Georgetown, which is also the tabulation office for all returns of this election.

On Thursday, November 9, 2017, at 10:00 a.m., at the Georgetown County Voter Registration and Elections Office 303 North Hazard Street, Georgetown, the Georgetown County Voter Registration and Elections will hold a hearing to determine the validity of ballots challenged in this election and certify the election results.

By Order of the Georgetown County Board of Voter Registration and Elections.

Donna Mahn, Director

Date of Publication: September 8th and September 22nd, 2017 (Georgetown Times).

0207-181-0664-1

PUBLIC NOTICE

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1107-1610796-1



RESOLUTION

October 9, 2017

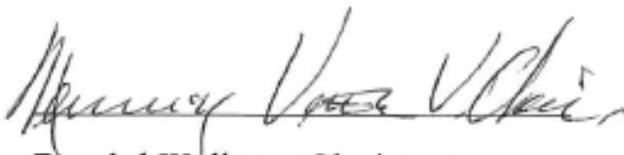
Whereas, the Waccamaw Regional Council of Government's Board of Directors and the CEDS Committee have reviewed the Comprehensive Economic Development Strategy for the five year period beginning October 2017; and

Whereas, the WRCOG Board and the CEDS Committee have determined that the CEDS is consistent with and supportive of the area's current Economic Development strategy.

Now, Therefore, BE IT RESOLVED AND ORDERED BY THE BOARD OF DIRECTORS OF THE WACCAMAW REGIONAL COUNCIL OF GOVERNMENTS:

That the Board of Directors supports the COG's submission of the document entitled "The Waccamaw Regional Economic Development District's 2017 - 2022 Comprehensives Economic Development Strategy," a copy of which is attached to this resolution, to the United States Economic Development Administration.

Attested by:



Randal Wallace, Chairman,
WRCOG

10/9/17

DATE



Sarah Smith, Executive Director,
WRCOG

10/9/17

Date