

REGIONAL WORKFORCE ASSESSMENT

WESTERN YORK COUNTY: YORK, CLOVER, & LAKE WYILE AREA

2022

REGIONAL COMMUTE TIME MAP

For the following Workforce Availability Analysis, we selected a representative point within the economic hub of the County – in this case, centered in York, using what is believed to be a reasonable commute time of 45 minutes from that point. While the potential for a wider "pull" is possible, especially for high wage jobs and professional positions, this drive time is a proper approximation of where a typical new or expanding industrial facility would attract workers from, in this region, based on the data. The map at right shows that drive time, and more broadly, where individuals who work in York County live by home ZIP code.

We use this approach because it is far more representative of the method a prospect would use when conducting its own analysis of labor availability in the region. In addition, we recognize that labor sheds are very fluid and are not constrained by political boundaries (e.g. state, county, or municipal lines). While a 45-minute drive time is a reasonable and consistent travel time for the vast majority of locations and prospective sites across the county, the workforce available within a 45-minute drive from one part of the county is likely to be different from a 45-minute drive from another point in the county.

Overall Worker In and Outflow

The graphic below shows the flow of private, primary workers into and out of the county. Overall, there is a net outflow of workers in the county.



Sources: US Census Bureau, On the Map, 2019. JobsEQ, ESRI, Data as of 2021Q3 Labor Shed Map – 45 Minute Drive Time – York County Rock Hill) York County Workers by ZIP of Residence



DEMOGRAPHIC PROFILE

(45 MINUTE DRIVE TIME)



Educational Attainment: West York vs. South Carolina



Key Takeaways:

- While not as favorable as the eastern part of York county that is more accessible to Charlotte's workforce and population, the overall demographic indicators for the western labor shed are still very favorable especially when compared to state levels.
- West York labor shed's educational profile is well aligned with state levels.

KEY OCCUPATIONAL PROFILE

(45 MINUTE DRIVE TIME)

The table below shows occupational presence and growth statistics for key production- related occupational clusters within the 45-minute drive time labor shed. Data for the labor shed are shown first, followed by *values for the entire state of South Carolina in italics to provide context.*

Occupational Cluster	Employment Count	Concentration (LQ 1.00 = Nat'l Avg.)	5-Year Historic Growth	5-Year Projected Growth	Notes
General Production	26,954	1.54	1.5%	3.3%	Very high counts and presence of general production
Centeral Froduction		1.32	1.2%	0.4%	workers.
Skilled Dreduction	11,633	1.67	1.2%	6.6%	Again, high presence and concentration of skilled production workers.
Skilled Production		1.48	1.6%	2.7%	
1:	38,225	1.3	17.8%	9.0%	Lower numbers of logistics workers compared to labor shed nearer Charlotte, but still favorable
Logistics		1.12	9.8%	4.6%	
N de just en en en	10,082	1.21	11.3%	11.1%	Large counts and concentration of maintenance workers
Maintenance		1.16	5.4%	6.9%	
Fu sin s sin s Task sisis s	1,050	1.05	-3.6%	7.8%	Moderate presence of mid-skill engineering
Engineering Technicians		1.10	-3.9%	3.9%	technicians.
Eu sin s suin s	5,014	1.11	14.8%	10.6%	
Engineering		1.05	9.2%	6.3%	Moderate concentration of engineers.
<u> </u>	1,226	0.56	13.9%	1.7%	Low numbers and concentration of science-related
Science		0.61	16.1%	6.5%	workers.
L. C	11,596	0.91	13.0%	12.8%	Moderate numbers and concentration of IT workers in
information rechnology		0.61	15.3%	9.1%	the labor shed.

Key Takeaways

Sources: JobsEQ, Data as of 2021Q3 based on four quarter moving average.

Occupational Clusters: While smaller in overall numbers, this labor shed centered further into York County shows very high concentration levels of key production and other occupational clusters. In both count and concentration, both labor sheds and locations are very well positioned for manufacturing opportunities.

Lower Presence of Highly-Skilled Science and IT Workers: The drop off in terms of sheer numbers of IT and science workers moving further away from metro Charlotte is evident, which may limit some more highly-advanced manufacturing and related opportunities.

UNDEREMPLOYMENT OVERVIEW

While the concept of <u>un</u>employment often garners the headlines, <u>under</u>employment remains just as important to the overall health of a local economy and the ability to attract and retain jobs. However, the concept is a bit more elusive than a simple measurement of whether a person is working or not working.

Sources of Workers for New and Expanding Operations

In Site Selection Group's experience, above and beyond relocating individuals from other locations, there are three main sources companies can rely on for their immediate staffing needs when establishing a new operation. Those concepts are displayed in the graphic at right. In a growing macro-economic environment near full employment, the first source of talent, the "unemployed" typically provides a small share of workers. While some companies can leverage a singular downsizing and rehire workers immediately, for the most part, many unemployed individuals may require significant training or upskilling. The last concept, those willing to re-enter the labor force, again, typically comprise a small number of an operation's needed workforce.

Defining the Components

As a result, companies are left with hiring from the ranks of the underemployed, that is, individuals who are currently working but who may prefer a different job. Two components of underemployment are relatively easy to measure. The first is part-time workers who would prefer full-time work (the concept is captured in part by the U-6 measure of unemployment at the national level). The second concept, those with non-permanent positions (e.g. contract, temporary, or seasonal jobs) who would prefer a full-time, permanent position, is also relatively simple to measure and estimate.

However, the final component – "overqualified" – can be challenging to rigorously define and measure. Most approaches to defining this component rely on some mixture of individuals who are not utilizing their skills or training, who are unsatisfied with their compensation relative to skill/training, or some combination thereof. While difficult to define, this nonetheless is in Site Selection Group's judgment the most important component of quantifying the potential workforce.



UNDEREMPLOYMENT SUMMARY

(45 MINUTE DRIVE TIME)

The figures below show key underemployment statistics for the selected 45-minute drive time labor shed in York County.



Source: 2017 SC Power Team Workforce Survey

Note: The data provided above are for the specific assigned drive time around a point. The Power Team's "SC Data Center" at datacenter.scpowerteam.com has the ability to pull this data for any specific point and drive time in the state.

APPENDIX: DEFINITIONS & METHODOLOGY

ADVANCED MANUFACTURING: STAFFING REQUIREMENTS

The graphic below highlights the occupational clusters typically present in most modern manufacturing facilities and separates them into broad skill and educational categories. SSG highlights in red the specific clusters that are most critical (and oftentimes in shortest supply) to a production operation's success.



OCCUPATIONAL DEFINITIONS

SKILLED PRODUCTION

SOC **OCCUPATION DESCRIPTION** 51-4110 Tool and Die Makers 51-1011 First-Line Supervisors of Production and Operating Workers 51-2041 Structural Metal Fabricators and Fitters 51-4021 Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic 51-4031 Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic 51-4033 51-4034 Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic 51-4041 Machinists 51-4072 Molding, Core making, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic 51-4081 51-4121 Welders, Cutters, Solderers, and Brazers 51-4122 Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders

- 51-8091 Chemical Plant and System Operators
- 51-9011 Chemical Equipment Operators and Tenders
- 51-9041 Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders
- 51-9161 Computer Numerically Controlled Tool Operators
- 51-9162 Computer Numerically Controlled Tool Programmers

GENERAL PRODUCTION

SOC OCCUPATION DESCRIPTION

- 51-2000 Assemblers and Fabricators
- 51-3000 Food Processing Workers
- 51-5100 Printing Workers
- 51-6000 Textile, Apparel, and Furnishings Workers
- 51-7000 Woodworkers
- 51-8000 Plant and System Operators
- 51-9000 Other Production Occupations

MAINTENANCE

SOC	OCCUPATION DESCRIPTION
47-2111	Electricians
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers
49-9041	Industrial Machinery Mechanics
49-9043	Maintenance Workers, Machinery
49-9071	Maintenance and Repair Workers, General

OCCUPATIONAL DEFINITIONS

INFORMATION TECHNOLOGY

SOC	OCCUPATION DESCRIPTION
15-1299	Computer Occupations, All Other
15-1241	Computer Network Architects
15-1244	Network and Computer Systems Administrators
15-1257	Web Developers and Digital Interface Designers
15-1245	Database Administrators and Architects
15-1256	Software Developers and Quality Assurance Analysts and Testers
15-1250	Software and Web Developers, Programmers, and Testers
15-1251	Computer Programmers
15-1212	Information Security Analysts
15-1211	Computer Systems Analysts
15-1221	Computer and Information Research Scientists
17-2061	Computer Hardware Engineers

11-3021 Computer and Information Systems Managers

LOGISTICS

SOC OCCUPATION DESCRIPTION

- 43-5061 Production, Planning, and Expediting Clerks
- 43-5071 Shipping, Receiving, and Inventory Clerks
- 53-3032 Heavy and Tractor-Trailer Truck Drivers
- 53-3033 Light Truck Drivers
- 53-7051 Industrial Truck and Tractor Operators
- 53-7062 Laborers and Freight, Stock, and Material Movers, Hand
- 53-7063 Machine Feeders and Offbearers
- 53-7064 Packers and Packagers, Hand
- 53-7065 Stockers and Order Fillers

SCIENCE

SOC	OCCUPATION
19-4042	Environmental Science and Protection Technicians, Including Health
19-4099	Life, Physical, and Social Science Technicians, All Other
19-4092	Forensic Science Technicians
19-4031	Chemical Technicians
19-4021	Biological Technicians
19-4010	Agricultural and Food Science Technicians
19-2041	Environmental Scientists and Specialists, Including Health
19-2032	Materials Scientists
19-2031	Chemists
19-2012	Physicists
19-1042	Medical Scientists, Except Epidemiologists
19-1029	Biological Scientists, All Other
19-1022	Microbiologists
19-1021	Biochemists and Biophysicists
15-2041	Statisticians
11-9121	Natural Sciences Managers

OCCUPATIONAL DEFINITIONS

ENGINEERING

SOC	OCCUPATION DESCRIPTION
11-3051	Industrial Production Managers
11-9041	Architectural and Engineering Managers
17-2011	Aerospace Engineers
17-2031	Bioengineers and Biomedical Engineers
17-2041	Chemical Engineers
17-2061	Computer Hardware Engineers
17-2071	Electrical Engineers
17-2072	Electronics Engineers, Except Computer
17-2111	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors
17-2112	Industrial Engineers
17-2131	Materials Engineers
17-2141	Mechanical Engineers
17-2199	Engineers, All Other

ENGINEERING TECHNICIANS

- SOC OCCUPATION DESCRIPTION
- 17-3027 Mechanical Engineering Technologists and Technicians
- 17-3026 Industrial Engineering Technologists and Technicians
- 17-3025 Environmental Engineering Technologists and Technicians
- 17-3024 Electro-Mechanical and Mechatronics Technologists and Technicians
- 17-3023 Electrical and Electronic Engineering Technologists and Technicians
- 17-3021 Aerospace Engineering and Operations Technologists and Technicians
- 17-3012 Electrical and Electronics Drafters
- 17-3013 Mechanical Drafters
- 17-3019 Drafters, All Other

York County, SC



