



REGIONAL WORKFORCE ASSESSMENT

EASTERN YORK COUNTY:
ROCK HILL, FORT MILL, & I-77 CORRIDOR

2022

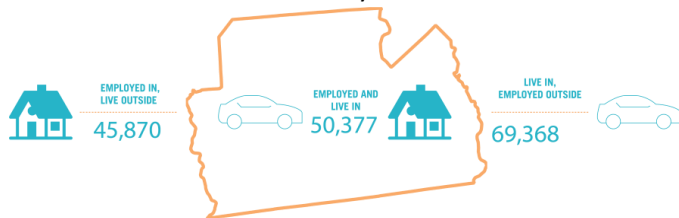
REGIONAL COMMUTE TIME MAP

For the following Workforce Availability Analysis, we selected a representative point within the economic hub of the County – in this case, centered in Rock Hill, 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.

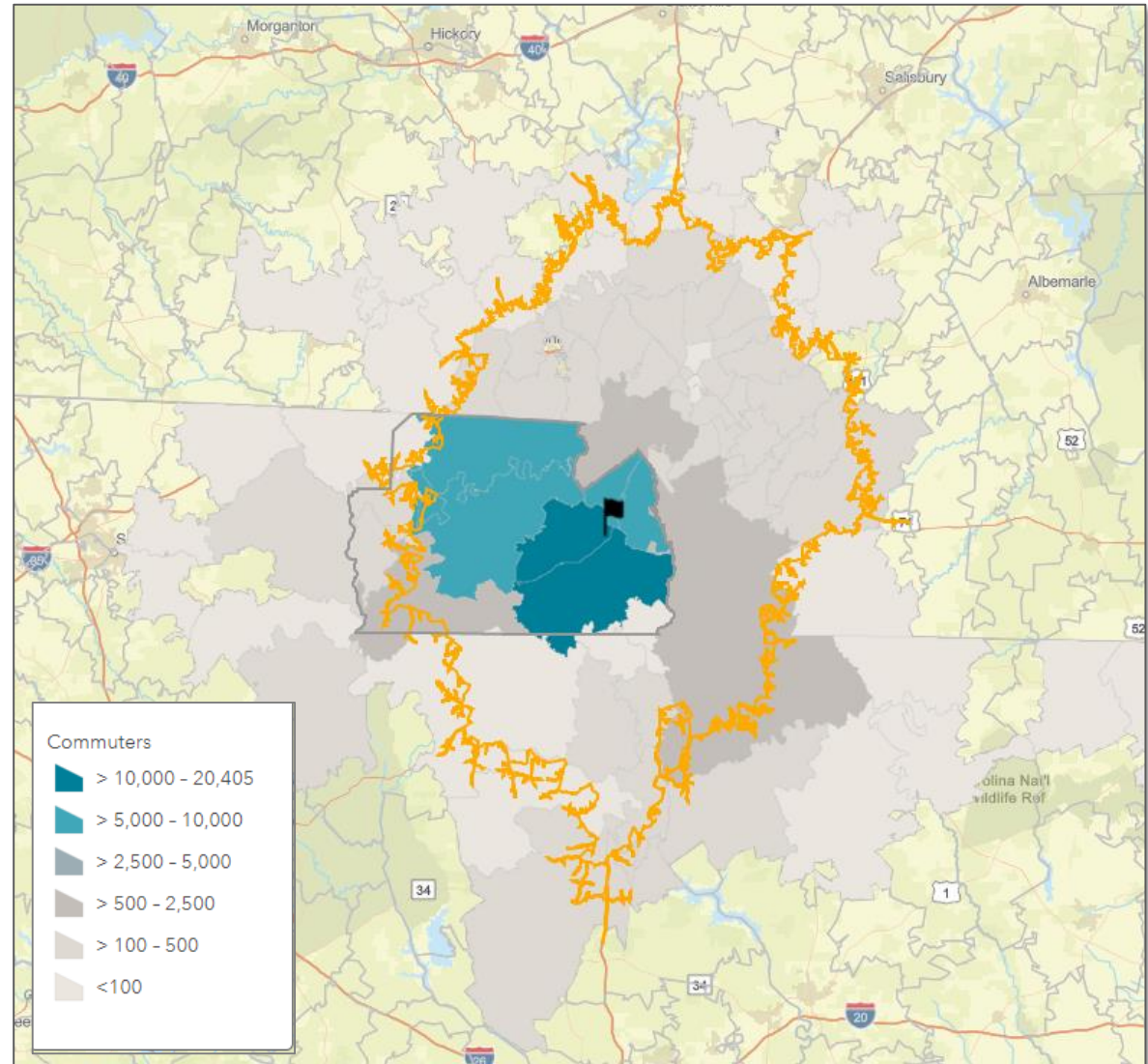
Overall Worker In and Outflow

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

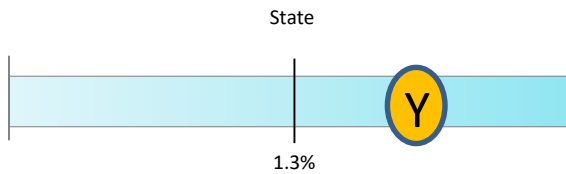
(45 MINUTE DRIVE TIME)



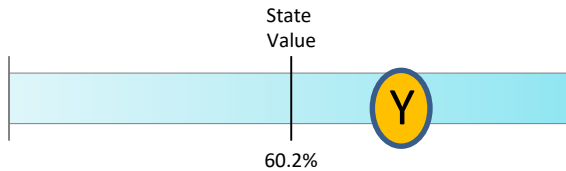
Population: 1,598,911

Labor Force: 860,530

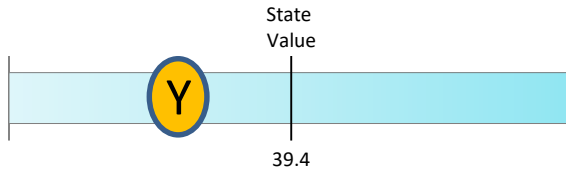
Growth Rate
(Average Annual)
2.1%



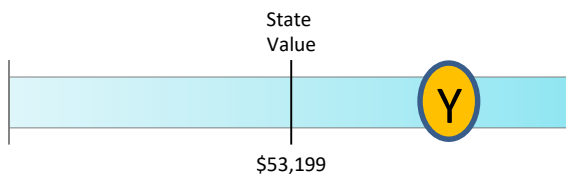
Participation Rate
(Ages 16+)
68.4%



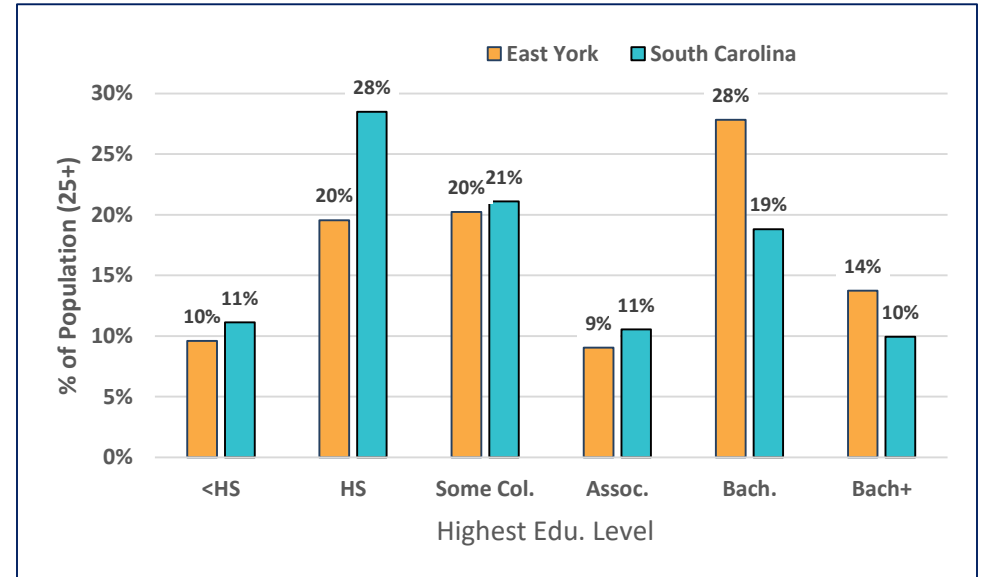
Median Age
37.6



Median Household
Income
\$69,827



Educational Attainment: East York vs. South Carolina



Key Takeaways:

- This labor shed contains a very large number of workers.
- Demographic Indicators in the corridor and labor shed are very favorable.
- The region boasts a large share of individuals with a bachelor's degree and higher.

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 | 37,382 | 0.94 | -2.3% | 3.4% | Very high counts and moderate concentration of general production workers. |
| | | <i>1.32</i> | <i>1.2%</i> | <i>0.4%</i> | |
| Skilled Production | 14,630 | 0.92 | -3.3% | 5.5% | Again, a high presence and moderate concentration of skilled production workers. |
| | | <i>1.48</i> | <i>1.6%</i> | <i>2.7%</i> | |
| Logistics | 77,249 | 1.16 | 23.7% | 8.1% | Very high presence and concentration of logistics and related workers. |
| | | <i>1.12</i> | <i>9.8%</i> | <i>4.6%</i> | |
| Maintenance | 18,766 | 1.00 | 9.2% | 9.9% | High presence and moderate concentration of maintenance related workers. |
| | | <i>1.16</i> | <i>5.4%</i> | <i>6.9%</i> | |
| Engineering Technicians | 1,727 | 0.76 | -7.1% | 7.2% | Low presence with moderate concentration of mid-skill engineering technicians. |
| | | <i>1.10</i> | <i>-3.9%</i> | <i>3.9%</i> | |
| Engineering | 8,458 | 0.82 | 9.6% | 9.2% | High presence with moderate concentration of engineers. |
| | | <i>1.05</i> | <i>9.2%</i> | <i>6.3%</i> | |
| Science | 3,364 | 0.67 | 4.4% | 11.8% | Low presence and concentration of science-related workers. |
| | | <i>0.61</i> | <i>16.1%</i> | <i>6.5%</i> | |
| Information Technology | 32,818 | 1.25 | 15.2% | 13.0% | There is a very high presence and concentration of IT workers in this labor shed. |
| | | <i>0.61</i> | <i>15.3%</i> | <i>9.1%</i> | |

Key Takeaways

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

Large Numbers of Key Occupational Clusters: The East York Labor Shed boasts very large numbers of key production and related workers drawing from both the North and South Carolina sides of the Charlotte metro area and is very well positioned for manufacturing and distribution operations.

High Presence of IT Workers:: The large share and presence of IT workers in the region could be an opportunity for highly advanced manufacturing or derivative operations (i.e. R&D, innovation).

UNDEREMPLOYMENT OVERVIEW

While the concept of unemployment often garners the headlines, underemployment 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.

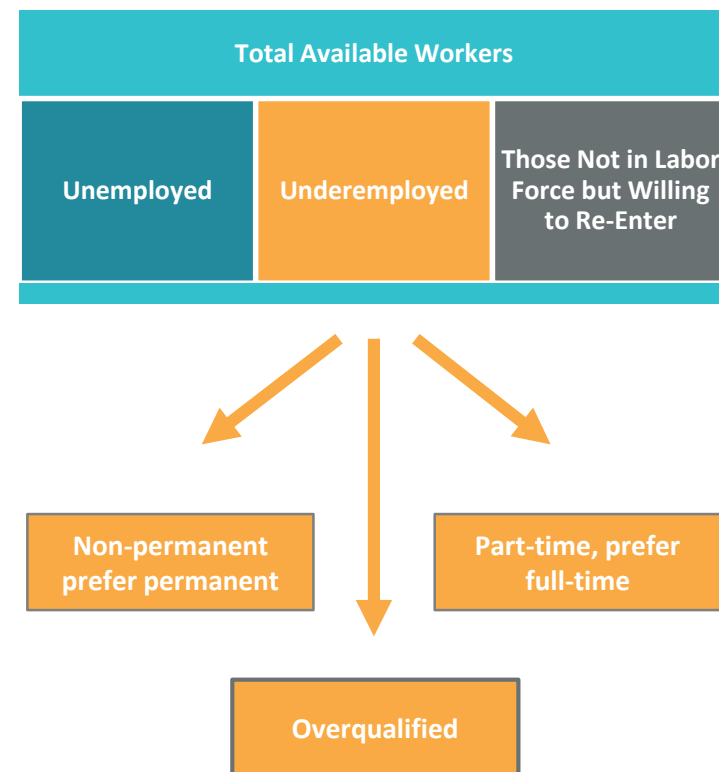
Sources of Workers for New and Expanding Operations

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.

16.2%
Overall Underemployment
State Rate of 16.2%



124,167
Potential Target Workforce
(Overall)

14.8%
Blue Collar Underemployment
State Rate of 15.5%



31,383
Potential Blue Collar Workforce

20.9%
Production & Distribution Underemployment
State Rate of 20.2%



21,305
Potential Production & Distribution Workforce

16.7%
White Collar Underemployment
State Rate of 16.5%



92,784
Potential White Collar Workforce

12.0%
Engineering, Science, and IT Underemployment
State Rate of 11.3%



5,462
Potential Engineering, Science, & IT Workforce

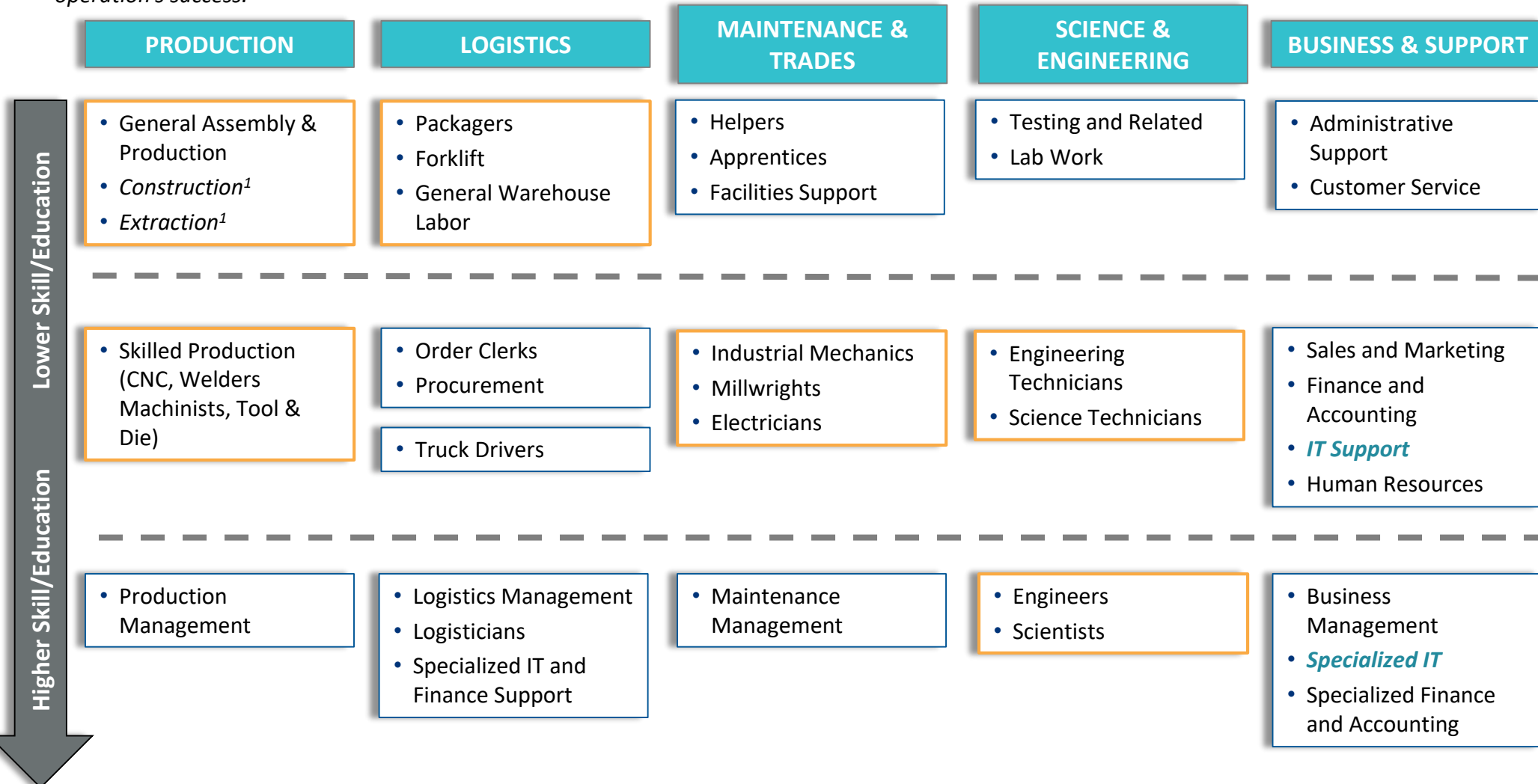
Source: 2017 SC Power Team Workforce Survey

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.



¹ – Indicates positions not directly employed in manufacturing, but requiring similar skill sets and transferability.

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 |
| 51-4031 | Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic |
| 51-4033 | Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic |
| 51-4034 | Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic |
| 51-4041 | Machinists |
| 51-4072 | Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic |
| 51-4081 | Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic |
| 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

