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A Competitive Realities Report for York County, SC

February 2021

Prepared for the:

YORK COUNTY
ECONOMIC DEVELOPMENT
SOUTH CAROLINA

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Introduction & Executive Summary

In October 2020, York County, South Carolina, retained Garner Economics, LLC to help create a multiyear, countywide economic development strategy that takes into account the dynamics of the York County market and propels the County into more high-value economic growth.

The focus of this engagement is for the County and its Economic Development Department to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the County strengthens its competitive position and can attract and retain the types of businesses that will continue to create jobs and opportunities for the population.

Specifically, the scope of services for the overall project includes:

- A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
- An Assets & Challenges Assessment (A&C) of the County from the perspective of a site-location consultant that facilitates investment decisions;
- Recommendations for business targets suitable for the County and its partners to pursue, based on our research and analysis;
- A workforce development service delivery assessment evaluation of the long- and short-term talent pipeline development in York County; and finally,
- A set of implementable recommendations that the leadership in the County can use to enhance the economic well-being of the area and make the County desirable for business and talent while sustaining and enhancing its quality of place.

York County, South Carolina

This *Competitive Realities Report* (CRR) is the first of two reports. It documents the work elements of the project scope and summarizes the findings of Phase One.

METHODOLOGY

The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the A&C. Together, the A&C, Workforce delivery assessment and mapping, Community Engagement Summary, and the Economic and Labor Analysis inform this process, upon which the final strategy report and its recommendations will ultimately be built, scheduled for late April 2021.

This CRR offers no recommendations. The final strategy report will consist of the business target recommendations along with conclusions and recommendations for how the County and its partners can align business development, community development, and entrepreneurship to optimize York County's competitive position.

PHASE ONE: Discovery

Evaluate the County's competitive position from an economic development perspective:

- Demographic & economic analysis
- Labor market & cluster analysis
- Community Assets & Challenges Assessment (A&C)
- Workforce delivery asset map
- Stakeholder feedback

Publish the *Competitive Realities Report* (a summary of Phase One).

PHASES TWO & THREE: Strategy

- Business retention and growth
- Product improvement (asset development)
- Entrepreneurship
- Business recruitment and marketing
- Workforce needs
- Program and organizational recommendations

Assets & Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an A&C of the County. This was done through a windshield tour of the area and against a predetermined list of 51 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the County based on the qualities, elements, and infrastructure that a business will look for when considering the County as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess the County that we use when engaged by a corporate client to evaluate communities for possible investment. The assessment allows us to document challenges that exist in the County that constitute potential barriers for successful economic development to occur. By knowing what challenges or gaps exist, the County and its partners can take the steps necessary to mitigate the situation, strengthen its overall "product," and be a more attractive business location. Likewise, by knowing its strengths, the County and its Economic Development Department can better leverage them in its efforts to attract businesses.

Stakeholder Input

As a complement to the assessment of the physical and regulatory structure of the County against its benchmarked peers, Garner Economics conducted five focus groups of key stakeholders in the area and distributed an electronic survey to reach the County's broader stakeholders. Interviews were also undertaken to collect information from select stakeholders. The purpose of these exercises was to solicit a variety of perceptions of the County's business climate, brand perceptions, and areas for improvement from community stakeholders.
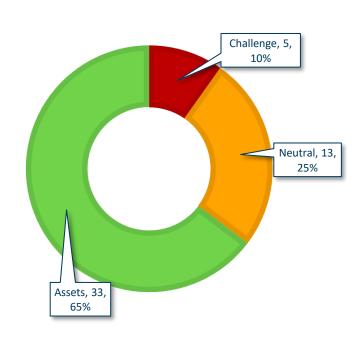
The following chapters describe our findings within a cohesive assessment of the County's current state and potential. It sets the groundwork for developing strategies and recommendations to assist the County in providing excellent economic development service delivery within the scope of its mission. The resulting strategy and implementation recommendations will be documented in the final report.

Workforce Delivery Assessment and Mapping

Garner Economics undertook a deep dive into the structure of those organizations that are engaged in training people for work and ultimately building the talent pipeline. This extensive detail can be found in Chapter 8.

Chapter 1: Dashboard Summary

ASSETS & CHALLENGES ASSESSMENT

Challenge, 5, 10%

Neutral, 13, 25%

Assets, 33, 65%

STAKEHOLDER ENGAGEMENT

212
Total Stakeholder contacts

County Council Engagement
Interviews

135
E-Survey Responses

5
Focus Groups

DEMOGRAPHIC & ECONOMIC ASSESSMENT

Positive — 17

Population
Diversity
Migration
Household Income
Per Capita Income
Poverty
Cost of Living
Crime Rate
Air Service
Labor Force
Participation
Participation (Families)
Labor Draw
Job Growth
Industry Composition
Colleges & Universities
Degrees Awarded

Neutral — 9

Age Distribution
Educational Attainment
Graduation Rates
Act Scores
Broadband
Self-Employment
Startups
Commuting
Annual Wages

Chapter 2: Stakeholder Engagement

Community input is a vital part of the strategic planning process. Feedback from stakeholders provides a context around the data accumulated in Phase One of the project and is a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community; these insights may or may not be discernible through desktop research and on-site tours.

To understand stakeholder sentiment around the business climate and economic development potential in York County, Garner Economics used three streams to solicit feedback on the business climate in the County:

- Five in-person focus groups with key stakeholders who are engaged with economic development, represent economic development partners, or are customers;

- Phone interviews with County Council members, the elected officials who set the vision for economic development in the County; and

- An electronic survey of a broader group of businesses in the County that engage in or are affected by economic development efforts in the County.

COMMON PERCEPTIONS AND CONCERNS

Among all three groups, the County's proximity to assets/geographic location, strong K-12 schools, quality of place, and road network were touted as its top strengths. Focus groups, interview participants, and survey respondents noted the County's weak infrastructure (in certain areas of the county), lack of a skilled workforce, and growing traffic congestion among the top obstacles inhibiting its ability to attract, expand, or retain business investment.

When asked to share their hope for the County's future, the most frequently noted themes among all groups were strengthening the County's quality of place (e.g., providing greater access to broadband, addressing housing availability, and protecting greenspace) and investments in the County's hard infrastructure (namely roads and public transportation).

The comments below summarize the specific key themes that surfaced through all three streams.

Note: The responses for all three groups are reported as they were offered; they may not necessarily be statements of fact but could be opinions or perceptions.

FOCUS GROUPS

Garner Economics held five focus groups on December 15 and 16, 2020, to collect stakeholder input regarding the business climate of York County. Special consideration was taken to adhere to COVID-19 protocols and safety measures. Focus groups were organized into five categories:

- Large Employers
- Small Businesses/Entrepreneurs
- Economic Development (ED) Partners
- Real Estate Brokers/Developers
- Workforce Development Professionals

A total of 73 stakeholders participated in the focus groups. Each group was asked the same set of questions. Below is a description of responses to several of the questions.

1. Growing, Dynamic & Progressive

When asked about the words that describe York County, the focus group participants overwhelming used variations of "growing," "progressive," and "dynamic" in their responses. For the most part, growth was deemed a positive trait for York County and was also referred to as a strength. The other top York County assets named in the focus groups were the County's proximity to Charlotte, followed by the schools, quality of life, and the road network/Interstate 77 as shown in Figure 2.1.

While many positive descriptions of York County came from focus group participants, some challenges were also noted. The theme of lack of equity across the County emerged. The difference between the more urban, developed eastern part of the County was contrasted with the more rural, less developed western portion of York County. This was mostly mentioned concerning infrastructure — water, sewer, and broadband — along with school systems and other efforts. It was also mentioned that municipalities within the County are sometimes at odds with each other or County leadership.

2. Leadership & Taxes

Infrastructure, workforce, roads and traffic congestion were among the top obstacles that focus group participants thought inhibit the County in its ability to attract, expand, or retain businesses. The other two impediments stated were leadership and taxes.
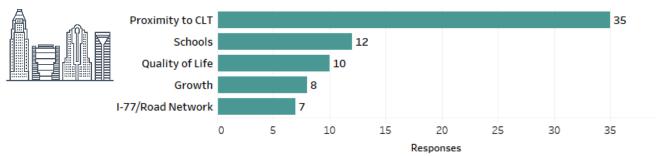
Leadership is a challenge in some participants' minds. Comments made during this discussion focused on the need for political investment of all partners in the County, and that as a whole, there is a need to bring everyone to the table to address planning and infrastructure needs. Another theme was that leadership development is needed for all sectors in the County.

Taxes and the tax structure, in general, were also noted as obstacles. It was acknowledged that businesses carry a large part of the tax base, and participants stated property taxes were expensive. Participants noted that they were appreciative of the economic development team and their ability to offer incentives to level the tax burden. One participant commented that "there are two tax rates … the retail rate and the Fee in Lieu of Taxes (FILOT). If you don't do the FILOT, you will have higher taxes."
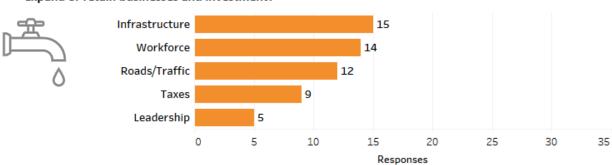
STRENGTHS, OBSTACLES, MISSING INFRASTRUCTURE, AND VISION
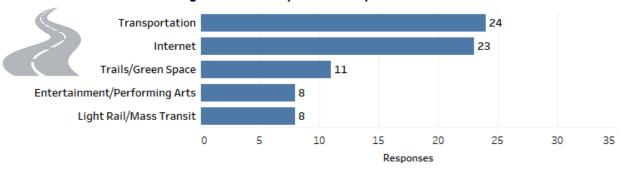
Figure 2.1 Top Five Focus Group Responses

What do you see as the County's strengths?

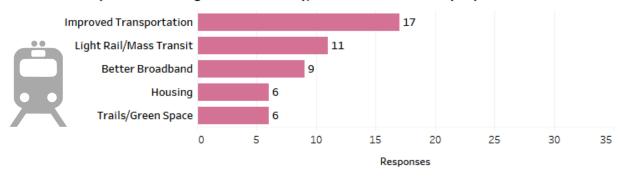| Category	Responses
Proximity to CLT	35
Schools	12
Quality of Life	10
Growth	8
I-77/Road Network	7

What do you think are some of the biggest obstacles that inhibit the County in its ability to Attract, expand or retain businesses and investment?

Category	Responses
Infrastructure	15
Workforce	14
Roads/Traffic	12
Taxes	9
Leadership	5

What infrastructure is missing or unsatisfactory in the County?

Category	Responses
Transportation	24
Internet	23
Trails/Green Space	11
Entertainment/Performing Arts	8
Light Rail/Mass Transit	8

What would you work to change about the County, not worried about money or politics?

Category	Responses
Improved Transportation	17
Light Rail/Mass Transit	11
Better Broadband	9
Housing	6
Trails/Green Space	6

3. Business Climate

The business climate, defined as those policies and laws enacted by the local government that impact local businesses, was rated as favorable. All focus groups scored the business climate of York County above three (Figure 2.2). On a scale from one to five, where five is the most favorable, the overall business climate average rate was 3.5. (By comparison, survey respondents also gave the County an average rate of 3.5). For the most part, comments showed that participants were pleased with the business climate, citing it as a good place to do business with support from the County and easy access to York County leadership. Several focus group participants said that, compared to many places, including Mecklenburg County (Charlotte) to the north, it's easier to get things done in York County. A few relayed frustrations with an uneven application of policies, "York County has more maybes," while another had a very specific enduring unsolved issue.
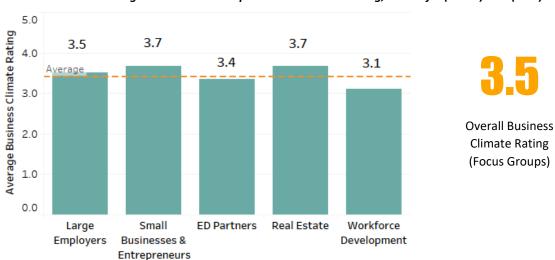
Figure 2.2 Focus Group Business Climate Rating, Scale of 1 (worst) to 5 (best)

3.5

Overall Business
Climate Rating
(Focus Groups)

4. Congestion & Better Broadband

The transportation theme and internet were the top two items noted as infrastructure deficiencies in the County. Transportation items included road congestion along with the quality of the road network. One participant did state that York County had the best roads in South Carolina, but yet another stated, "You can't widen your way out of congestion." Separately, on the missing infrastructure list were light rail and other mass transit options. It was noted that the City of Rock Hill recently began a fixed-route bus system.

Lack of broadband availability and speed were mentioned in every focus group. Lack of broadband was more pronounced in the western portion of the County, with some areas having severely limited options. Only a few "hot spots" were quoted in more urban areas.

The other items listed as missing infrastructure were trails, green space, and recreation areas along with entertainment district amenities such as a performing arts center or concert venue.

5. Talent & Workforce Development

The impact of York County's workforce was evident throughout the focus group responses and discussions. Workforce was included in the list of top obstacles to York County. Common themes around this topic are the lack of soft skills or life skills, the need for more technically skilled workers, and the competition of the Charlotte market. It was noted that there is a nursing shortage and that there were not sufficient nursing programs in the County. The COVID-19 pandemic has also heightened the difficulty of finding the right fit for workers, and adding to the problem is the fact that some workers receive higher pay with unemployment benefits than working.

> "I feel like I am recruiting for jobs and not careers."
>
> —*Focus group participant*

Institutions are working on life skills — some high school systems are addressing this, such as Fort Mill's High School 101. One participant felt that these efforts in high school are not particularly effective. Others spoke of the need to train for the job, not how to interview for the job. Winthrop University is promoting professional and career development by adding internship requirements in freshmen and sophomore years.

Apprenticeship programs are available; however, there is competition with the neighboring Charlotte Apprenticeship 2000 model. Work is being done to apply for grant funding to improve the South Carolina apprenticeship model to better compete.

Notable comments within the greater discussion were the lack of affordable housing to recruit and retain workers in the lower wage tier, the absence of any facility or operation of York Tech in the western part of the County, and the many training programs in place or developing by York County institutions. Most focus groups rated the County's workforce development delivery system above average, as seen in Figure 2.3. The workforce development delivery system is the education and training system that prepares the York County resident workforce.
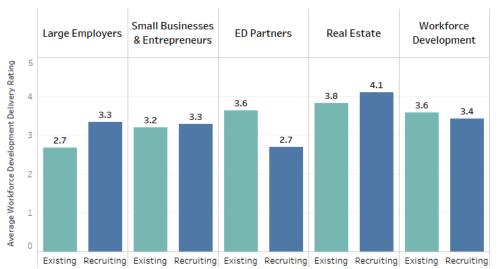
Figure 2.3 Focus Group Workforce Development Delivery Rating, Scale of 1 (worst) to 5 (best)

3.5
Workforce Development Supporting Existing Business & Industry

3.3
Workforce Development for Recruiting New Businesses

6. Business Sector Targets

A majority of focus group participants supported York County's existing targets with Distribution & Logistics and Chemicals slightly less desirable(Figure 2.4). The top new target suggestions include Sports Tourism, Technology, and Agribusiness. Other ideas for targets mentioned were Construction, Health Care, Automotive Components, Entertainment, Hospitality, and FinTech.

Figure 2.4 Focus Group Existing Target Desirability

7. Overarching Focus Group Sentiment

Overwhelmingly, focus groups touted the proximity to Charlotte (geographic location), excellent schools, and York County's quality of life/place as York County's best assets and see the County as dynamic and growing. The road network and traffic are a concern, but the interstate system is also seen as a great feature for business location. The desire for better transportation options, such as light rail, exists among many participants. The lack of fast, dependable internet options is a definite, glaring issue — particularly for the western part of York County.

The divide of "above the river" and western York County was present in each focus group's discussions along with the inequities in infrastructure and education systems. Additionally, the theme that the County was not always on the same page in its planning and leadership was raised.

Focus groups looked to improve the quality of life, expressing the need for more trails, parks, and green space along with entertainment district options such as performing arts and concert venues. Sport Tourism efforts in place in Rock Hill were also highlighted as a successful and valuable venture.

Finally, focus group respondents desired more coordination in economic development efforts, but on the whole, were very complimentary of York County's Economic Development efforts, including the County's Economic Development Department. Comments included that staff have a "finger on the pulse of companies and their concerns" and that they had invited the school system to the table to participate in economic development.
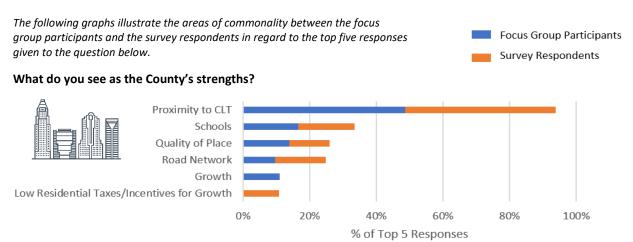
ELECTRONIC SURVEY — COMMONALITIES WITH FOCUS GROUP RESPONSES

Separate from the focus groups, but containing the same questions, Garner Economics conducted an electronic survey of York County's business community. The objective for surveying this group was to solicit perceptions from a broader mix of the business community in the County. Generally speaking, the survey respondents are not as closely involved in the County's economic development efforts as the focus group participants, but those efforts have an impact on the overall climate in which they operate their businesses.
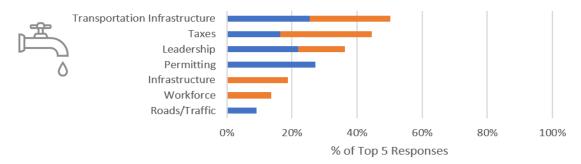
The survey was in the field November 30 to December 23, 2020, and was started by more than 256 respondents. Of those, 135 completed more than 50% of the survey. The aggregate of those 135 responses can be found in Appendix A.

Figure 2.5 summarizes the commonalities among the focus group and survey respondents. For each of the questions, there was varying agreement as to the top concerns in each area. As noted above, the County's proximity to assets/geographic location, strong K-12 schools, quality of place, and road network were touted as its top strengths. Focus group participants and survey respondents varied in their views on the aspects of the County's infrastructure in most need of attention, Likewise, survey respondents tended to have a broader view of weaknesses or inhibitors to economic development attraction/expansion efforts. As would be expected given their broader representation, survey respondents leaned more toward obstacles affecting overall quality of place rather than specific business climate impediments.
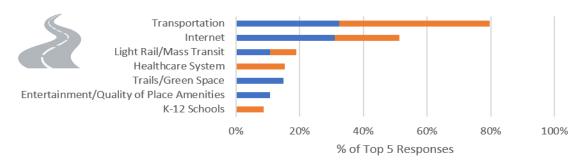
Figure 2.5: Comparison Among Focus Group and Survey Responses

The following graphs illustrate the areas of commonality between the focus group participants and the survey respondents in regard to the top five responses given to the question below.

What do you see as the County's strengths?

What do you think are some of the biggest obstacles that inhibit the County in its ability to attract, expand, or retain businesses and investment?

What infrastructure is missing or unsatisfactory in the County?

The final component of the stakeholder engagement process was a series of one-on-one phone interviews with County Council members. York County Economic Development made introductions for Garner Economics to each of the Council members, inviting them to share their perceptions; four of the Council members were interviewed.

As a group, the Council members share many of the same thoughts as the focus group and survey respondents. They note the distinctive quality of place the County has to offer and see how those strengths can differentiate the area as a home for businesses. Given the Council members' mandate to serve a broad range of constituents within the County, the group looked at economic development and its impacts holistically, focusing not only on the specific programs to attract, retain, and expand business in the County but more so on the direct and indirect impacts those programs have (or could have) on the residents and long-term competitiveness of the County.

Chapter 3: Assets & Challenges Assessment

York County offers a unique mix of assets for businesses that are contemplating relocation, expansion, or a startup. Our approach in conducting the A&C is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding the County's assets and challenges from a location strategy perspective, we believe that the County will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding strengths and opportunities, the County and its Economic Development Department will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets and to strategize what product is needed to enhance the County's global competitiveness.

Garner Economics analyzed 51 community factors as part of the assessment. Ratings were identified by evaluating the County's position for each of the factors against the state of South Carolina, the Charlotte Metro, and the United States. Two counties were also benchmarked: Williamson County, Tennessee, and Greenville County, South Carolina. Of the 51 variables analyzed, only 5 are considered a Challenge, 13 are listed as Neutral, and 33 noted as Assets. The asset to challenge ratio for York County is extremely positive and documents the area's many competitive features. However, any of the five Challenges or 13 Neutral ratings could disqualify the County as an investment location, depending on the project and company's decision-making criteria.

We define a Neutral rating as normal or average (depending on the context) in the realm of economic development opportunity and competitiveness. An Asset rating indicates a positive feature of the County that would be evaluated and rated as a competitive strength versus the benchmark locations.

REPORT DASHBOARD

Indicates the County is better (more positive) compared to the benchmarked geographies or points to a positive trend or asset within the area.

Indicates York County is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmarked geographies.

Indicates the County performs worse compared to the benchmarked geographies or points to a negative trend or challenge within the area.

Access to Markets

It's all about location and infrastructure, and York County has both. Of the nine factors measured, York has a whopping seven that are ranked an Asset and two that are rated Neutral. There were no variables rated as a Challenge. Assets include its geographic location and the fact that there are over 68.6 million people located within a 400-mile radius of the County; close proximity to Charlotte Douglas International Airport; I-77 which runs through the County and I-85 nearby; service by both CSX and NS railways; and a local general aviation airport that can serve corporate aircraft. Broadband availability and speeds are considered Neutral, with different levels of service depending on which part of the County you are located in.

Access to Markets	Rank
Centrally located for major regional market	⬆ a
Centrally located for national market	⬆ b
Well-positioned to serve international markets	⬆ c
Interstate highways	⬆ d
Rail service	⬆ e
Port facilities (inland and/or water)	➡ f
Within one hour of commercial air passenger service	⬆ g
General aviation airport capable of handling corporate aircraft	⬆ h
Broadband availability and speeds	➡ i

Labor

Talent is the new currency™, and the availability of labor is always the first or second ranked factor businesses take into consideration when either expanding an existing location or seeking a new one.[1] York County has a better than average Location Quotient in occupations related to manufacturing (production) and administrative support workers, based on federal standard occupational classifications (SOC).[2] The cost of labor is an Asset, especially compared to York's benchmarks. York Technical College is an Asset, as well as the County's home to Winthrop University and Clinton College. Challenges included fewer occupations in computer and mathematical talent and in managerial skills.

Labor	Rank
Availability of skilled production workers	⬆ j
Availability of skilled admin support workers	⬆ k
Availability of computer and mathematical talent	⬇ l
Availability of managerial personnel	⬇ m
Cost of labor	⬆ n
Availability of postsecondary vocational training	⬆ o
Within 1/2 hour of major university/college(s)	⬆ p
Availability of engineering or computer science degree(s)	⬆ q

Most rankings have an associated endnote located at the end of the report.

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[1] Talent is the new currency™ is a registered trademark of Garner Economics.

[2] Location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region "unique" in comparison to the national average.

Access to Resources

York County makes things. It has a high Location Quotient with the number of people employed in manufacturing facilities (11,500 employed in manufacturing), and it ranks 12th in South Carolina out of 46 counties that produce agricultural products in the state, with a market value of over $100 million annually.

Access to Resources	Rank
Availability of manufacturing processes	⬆ r
Availability of professional, scientific, and technical services	⬇ s
Availability of management of companies and enterprises	⬆ t
Agribusiness related economy	⬆ u

Access to Space

No product, No project™ is a long-used mantra of Garner Economics.[3] What we mean by this is that you can't sell from an empty wagon. Sites and buildings (product) need to be in place to accommodate the needs and demands of the investor. If it does not exist, then York County gets overlooked and the prospective company goes elsewhere. York County has over 32 million square feet of rentable building area (RBA) with an 11.3% vacancy rate. Class A and B office space is rated as Neutral with over 7.6 million RBA and a vacancy rate of 6.1%. Thus, the office supply is more limited.

Access to Space	Rank
Availability of fully served and attractive industrial sites and space (buildings)	⬆ v✳
Availability of suitable office space (Class A and B space)	➡ w✳

Access to Capital

Of the three variables measured, all three are rated as Neutral. Venture capital and non-conventional small business funding are limited. Venture capital is through an angel network, called VentureSouth Rock Hill, and small-business loans are offered through SBA conduits from area banks and the local Council of Governments.

Access to Capital	Rank
Availability of tax-exempt financing for new industrial facilities	➡
Availability of low-interest loans for small business from local sources	➡ x
Availability of venture capital from local sources for business startups or early-stage funding	➡ y

Most rankings have an associated endnote located at the end of the report.

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[3] No product, No project™ is a registered trademark of Garner Economics.

County Economic Development Program

Of the eight variables measured, four are rated as an asset, including the staff of the County's Economic Development Department, a history of creating and implementing strategic plans, public and private leadership support for economic development, and efforts to cooperate among various agencies engaged in the economic development.

County Economic Development Program	Rank
Adequate level of professional staff	⬆ z
Involvement of both public and private sectors	➡ aa
Local economic development organization has a strategic plan	⬆ bb
Level of leadership support of economic development program	⬆ cc
Level of cooperation between organizations involved in economic development activity	⬆ dd
Level of awareness of community regarding the economic development process	➡ ee
Level of funding for local economic development program (operating budget)	➡ ff
Organizational marketing/promotion budget	➡ gg

Government Impact on Business

Business climate is a key consideration in determining the opportunity for growth in a particular jurisdiction. A favorable business climate will drive investment to that geography. A poor business climate will drive investment out. This is a mixed bag of ratings for York County. The availability of water and wastewater treatment is an asset with four municipal systems in York County. Local incentives and school test scores are also considered Neutral, depending on the school system. But the condition of many of the local streets was rated a challenge, based not only on our own observations but through stakeholder feedback. Local property taxes round out the two factors that were rated a challenge. Only four other counties in South Carolina have a higher property tax rate than York County.

Government Impact on Business	Rank
Availability/capacity of water and wastewater treatment	⬆ hh
Condition and maintenance of local streets	⬇ ii
Availability and type of local incentives	➡ jj
Quality of local elementary and secondary education (test scores)	➡ kk
Business permitting procedures and costs	➡ ll
Local property taxes	⬇ mm

Most rankings have an associated endnote located at the end of the report.

Quality of Place

Quality of Place or quality of life is what we consider the "charm factor" for a community. It is a prime consideration is attracting people and talent. This is York County's sweet spot. Of the 11 factors measured, all 11 are considered an Asset. Garner Economics has conducted over 150 Asset and Challenges reports over the last 18 years, and this is the first time a community has rated a perfect Asset rating for quality of place.

Quality of Place	Rank
Availability of executive-level housing	⬆ nn
Availability of moderate-cost housing	⬆ oo
Availability of apartments	⬆ pp
Cost-of-living index	⬆ qq
Level of crime	⬆ rr
Level of cultural activity	⬆ ss
Availability of recreational opportunities	⬆ tt
General appearance of the community	⬆ uu
Availability of adequate medical facilities	⬆ vv
Availability of quality hotels, motels, and resorts	⬆ ww
Appearance of the Central Business District(s)	⬆ xx

Most rankings have an associated endnote located at the end of the report.

Chapter 4: Demographics & Community Trends

The following analysis examines the economic position and competitiveness of York County, South Carolina. York County is located just south of Charlotte, North Carolina, and is a core part of the dynamic Charlotte-Concord-Gastonia, NC-SC Metropolitan Statistical Area (Charlotte Metro).

For context, this report compares York County to itself over time, against the Charlotte Metro, the state of South Carolina, the nation, and two benchmark communities. The benchmark counties used to view York County's competitive status are Greenville County, South Carolina, and Williamson County, Tennessee (Nashville Metro area). These benchmarks were selected by York County's economic development team for their similarities or for their aspirational qualities.

This analysis relies heavily on raw, objective data collected by governmental or impartial third-party agencies. In all cases, the original and most currently available data for all geographies (as of November 2020) are used. Recent significant economic shifts due to the COVID-19 pandemic are starting to be included in some economic data and are noted where appropriate. Garner Economics conducted all unique calculations and computations from the original data. For several data points, county data was not available and either city-level or metro-level data were used for those indicators.

Metrics analyzed for the discovery process were rated showing positive, neutral, or negative indicators. These graphic markers relay the analysis of the measure compared to the benchmarks noted above, change over time, or both. Neutral grades generally resulted when there were both negative and positive aspects of these factors or when comparing York County to the benchmarks.
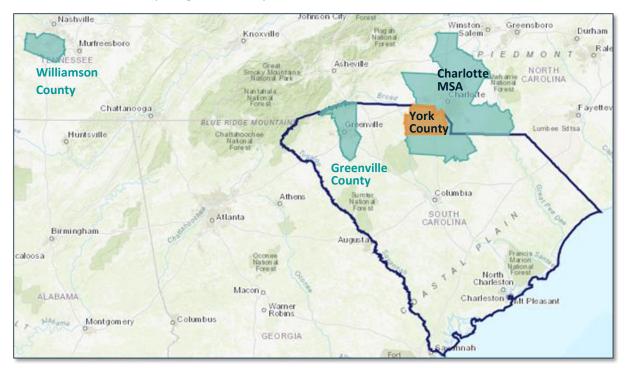
Measurements Included:

- Population Trends
- Age
- Diversity
- Migration
- Educational Attainment
- Graduation Rates
- ACT Scores
- Income
- Poverty
- Cost of Living
- Crime Rate
- Air Service
- Broadband Access & Speed

Population Trends

Table 4.1 Population, 2010–2019

Geography	2019	2015-2019 Change		2010-2019 Change	
		#	%	#	%
York County	280,979	30,413	12%	54,114	24%
Greenville County	523,542	32,642	7%	70,845	16%
Williamson County	238,412	26,807	13%	54,269	29%
Charlotte Metro	2,636,883	188,985	8%	386,762	17%
South Carolina	5,148,714	256,776	5%	513,065	11%
United States	328,239,523	7,604,360	2%	18,917,857	6%

Figure 4.1 Population Growth, 2010–2019
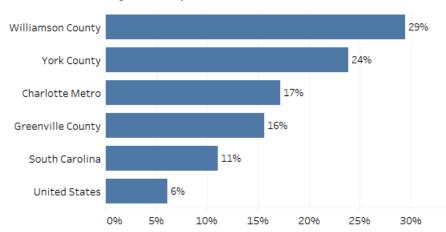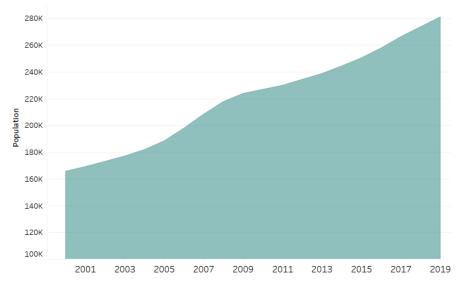
Figure 4.2 York County Population Growth, 2000–2019

Source: U.S. Census Bureau Population Estimates, Garner Economics

The population growth of an area is a key element in the analysis of a community and can be a significant factor in local economic health. In today's labor force climate, this is often a major consideration in business expansion and site-selection decisions.

York County has seen significant growth in both time segments measured — from 2010 and also from 2015 to 2019. The County grew 24% overall since 2010, behind Williamson County's rate of increase (29%). York County's growth is well ahead of Greenville County (16%), the Charlotte Metro (17%) as well as the state and nation.

The rate of population growth has steadily increased since 2000, as seen in Figure 4.2. This is projected to continue, as seen in Figure 4.3, with estimated annual growth rates highest along highways and immediately outside the I-485 loop encircling Charlotte.

Figure 4.3 Estimated Annual Growth Rate for York County and the Surrounding Area, 2020-2025
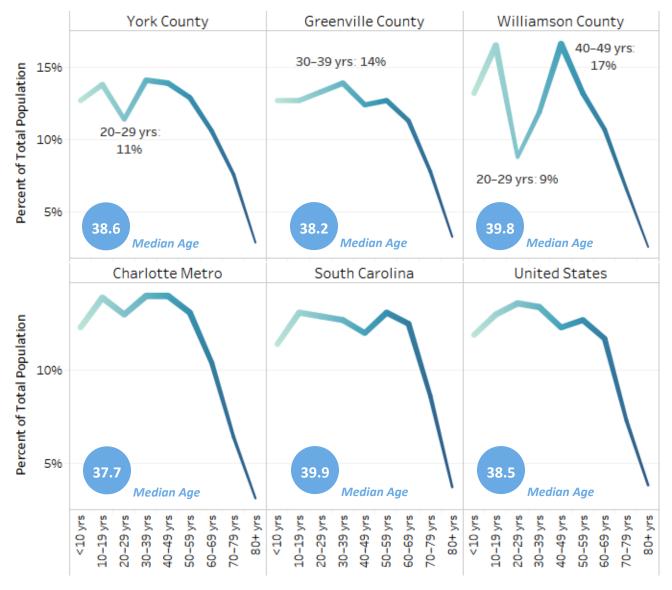
Age Distribution & Median Age

Figure 4.4 Age Distribution & Median Age, 2019

The age composition of a local population is an important determinant in labor force evaluation and, therefore, a factor in business decisions and competitiveness. The lack, or underrepresentation, of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations.

With the current focus on retaining and attracting talent, an existing pool of younger people for both current and future workforce participation is essential in making a community attractive for companies and people alike. York County's largest age group is those from 30–39 years (14%), with those from 40–49 years close behind at 13.9%. The median age for all geographies is near the 38-year mark, with the Charlotte Metro having the youngest at 37.7 years, and South Carolina having the oldest at 39.9 years. York County's population has a median age of 38.6.
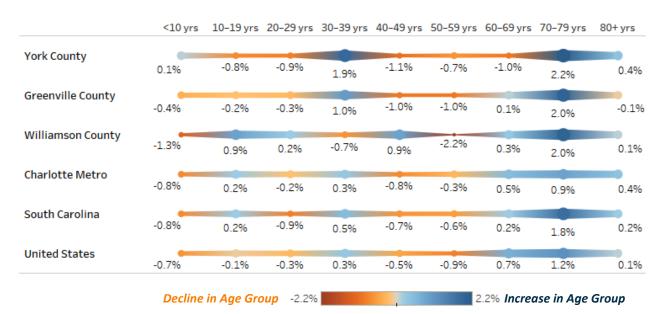
Table 4.2 Age Group Distribution, 2019
Highest Age Group for Each Geography in Gray

Age Group	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
<10 yrs	12.7%	12.7%	13.2%	12.3%	11.4%	11.9%
10–19 yrs	13.8%	12.7%	16.5%	13.9%	13.1%	13.0%
20–29 yrs	11.4%	13.3%	8.8%	13.0%	12.9%	13.6%
30–39 yrs	14.1%	13.9%	11.9%	14.0%	12.7%	13.4%
40–49 yrs	13.9%	12.4%	16.6%	14.0%	12.0%	12.3%
50–59 yrs	12.9%	12.7%	13.2%	13.1%	13.1%	12.7%
60–69 yrs	10.6%	11.3%	10.7%	10.4%	12.5%	11.7%
70–79 yrs	7.6%	7.8%	6.6%	6.4%	8.6%	7.3%
80+ yrs	2.9%	3.3%	2.6%	3.1%	3.7%	3.8%

Source: U.S. Census Bureau, Garner Economics

Figure 4.5 Change in Age Groups as a Percentage of Total Population, 2015–2019

Source: U.S. Census Bureau, Garner Economics

The "Graying of America" is evident among the geographies examined in this report when comparing the 2015 to 2019 population by age. Older age groups, for the most part, grew their share of the overall population. York County saw a 1.9% increase of 30- to 39-year-olds along with a sizable 2.2% growth of 70- to 79-year-olds between 2015 and 2019.

⬆ Diversity

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity to attract and retain workers. This is particularly true for multinational firms looking to attract workers from outside the United States. As talent attraction and retention are key factors in economic development today, there is a rising awareness by some companies with strong corporate cultures regarding diversity to seek areas that reflect or support inclusiveness among many groups of people.

York County is composed of several races and ethnicities, including those who identify as White (74%) and Black or African American (19%). Those that report Hispanic or Latino origin make up 5.9% of the population. This category is presented as a separate category from racial makeup. The County is also home to the Catawba Indian Nation, the only federally recognized tribe in South Carolina, making up 1.2% of the population, which is the same level for the United States as a whole.

Table 4.3 Race and Ethnic Origin Population, 2019
Highest Rate in Each Group Shaded

	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
White	74.0%	72.5%	88.1%	65.7%	66.7%	72.0%
Black or African American	19.1%	17.1%	3.7%	23.0%	26.5%	12.8%
American Indian and Alaska Native	1.2%	0.6%	0.1%	0.6%	0.6%	1.2%
Asian	2.5%	2.5%	4.6%	3.8%	1.7%	5.7%
Other Race	1.4%	4.4%	0.5%	4.2%	2.3%	5.2%
Two or More Races	2.0%	3.0%	2.9%	2.9%	2.4%	3.4%
Hispanic or Latino[4]	5.9%	9.5%	4.9%	10.6%	5.8%	18.4%

Source: U.S. Census Bureau, Garner Economics

⬆ Migration

Attracting new residents from a diversity of outside locations can reflect an area's broader appeal and provide an indicator of economic dynamism. York County saw a net increase of nearly 7,200 new residents from both natural increase (births) and migration. International migration comprises both foreign-born residents as well as citizens who are moving to or from overseas locations, including military movements.

Table 4.4 Migration, 2018-2019

	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
Net Natural Increase	738	1,812	1,032	10,605	5,609	956,674
Net Domestic Migration	6,252	5,618	4,835	28,142	53,034	n/a
Net International Migration	188	1,469	574	5,120	5,724	595,348
Total Population Change	**7,197**	**8,921**	**6,434**	**43,933**	**64,558**	**1,552,022**

Source: U.S. Census Bureau, Population Estimates, Garner Economics

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[4] Hispanic or Latino category is presented as a separate category from racial makeup; therefore, the sum of racial categories will total more than 100%.

Figure 4.6 Sources of New Residents, 2018-2019

Source: U.S. Census Bureau, Population Estimates, Garner Economics

Of the estimated population increase from 2018 to 2019, net domestic migration is the largest source of new residents for York County (86.9%), as seen in Figure 4.6. Net international migration is 2.6%, the lowest among benchmarks. Natural increase is second-lowest to South Carolina (10.3% and 8.7% respectively).

York County has a close relationship with the Charlotte Metro and other regional counties when it comes to migration. Data from 2014-2018 revealed that Mecklenburg County was the top county, being the source of 1,700 residents (net). This was by far the most prolific migration location, which is understandable given its location just across the state line from York County. Lancaster and Chester Counties also provide net new residents for the County. On the flip side, Cook County (Chicago) was the lowest, with a net outbound migration of 272 during this time frame.

Figure 4.6 Sources of New Residents – Top and Bottom Counties for Net Migration, 2014-2018

Source: U.S. Census Bureau, Garner Economics

Figure 4.7 Educational Attainment of Residents Ages 25+ Years, 2019

Source: U.S. Census Bureau, Garner Economics

The level of education of the community's population is a good indicator of labor force quality and is a decisive factor in economic competitiveness. Firms understand the need to operate in areas with a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

York County's population aged 25 years or older is 93% high school-educated, second only to Williams County in the percentage of citizens with at least high school credentials, and 45.2% of York County's population has obtained a college degree. This is ahead of South Carolina and the United States, but behind all other geographies. Williamson County has the most educated population, by far, with 68% of its population holding an associate degree or higher.

Figure 4.8 captures the percentage points gained or lost for each educational category between 2015 and 2019. York County had a 4% increase in those with *Some College, No Degree* over this time frame. The County gained 2.6% of residents with a *Graduate or Professional Degree* and a slight increase in the population earning an *Associate Degree*. It is concerning to see the percentage of the population with *a Bachelor's Degree* decline slightly.
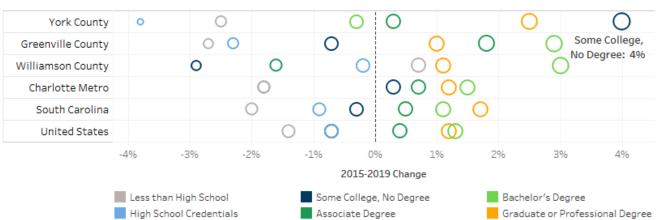
Figure 4.8 Educational Attainment Trend, Ages 25+ Years, 2015-2019

Source: U.S. Census Bureau, Garner Economics

Graduation Rates

Secondary school performance of public high schools is an important performance metric. The share of high school students that graduate within four years of beginning ninth grade is a reflection of the quality of local public school districts, and its ability to provide talent to the local business community.

York County has four school districts with very different performance levels, according to this measure. However, compared to the state and nation, the systems score better. Williamson County consistently graduates more than 95% of its students. York 4 (Fort Mill) district reached graduation rates of 95% in 2019 and 2020. National average graduation rates are not yet available for 2019 and 2020.
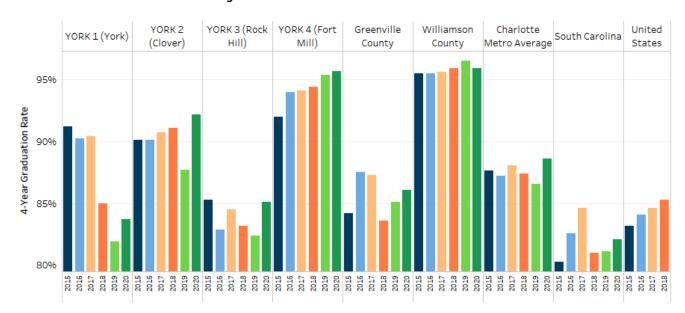
Figure 4.9 Four-Year Cohort Graduation Rates

Table 4.5 Four-Year Cohort Graduation Rates

System Name	2015	2016	2017	2018	2019	2020
York 1 (York)	91.2%	90.2%	90.4%	85.0%	81.9%	83.7%
York 2 (Clover)	90.1%	90.2%	90.7%	91.1%	87.7%	92.2%
York 3 (Rock Hill)	85.3%	82.9%	84.5%	83.2%	82.4%	85.1%
York 4 (Fort Mill)	92.0%	94.0%	94.1%	94.4%	95.4%	95.7%
Greenville County	84.2%	87.5%	87.3%	83.6%	85.1%	86.1%
Williamson County	95.5%	95.5%	95.6%	95.9%	96.5%	95.9%
Charlotte Metro Average	87.7%	87.2%	88.1%	87.4%	86.6%	88.6%
South Carolina	80.3%	82.6%	84.6%	81.0%	81.1%	82.1%
United States	83.2%	84.1%	84.6%	85.3%	n/a	n/a

Sources: National Center for Education Statistics, South Carolina Dept of Education, North Carolina Dept of Public Instruction, Tennessee Dept of Education, Garner Economics

Figure 4.10 ACT Average Composite Scores

Standardized testing is another comparative tool to reflect the performance of secondary schools. The ACT exam is a standardized test for college admissions in the United States and a widely accepted measure of education quality. Both South Carolina and Tennessee require ACT testing of high school students, which increases the percentage of students taking the exam. Overall, the ACT exam has become more popular than the SAT exam in the geographies studied and is used for this indicator.

Together, York County school systems compare well to Greenville and the consolidated weighted average for the Charlotte Metro as well as the state. Williamson County maintains the highest performance in ACT scores for all years studied. Viewed as separate scores, York County school districts have widely distributed scores throughout the years examined. The trend shows both Fort Mill and Clover districts performing well and increasing composite scores, while the remaining districts have experienced a decrease from 2019 to 2020. Issues related to the COVID-19 pandemic and access to testing may affect these districts more in the current 2020 environment.
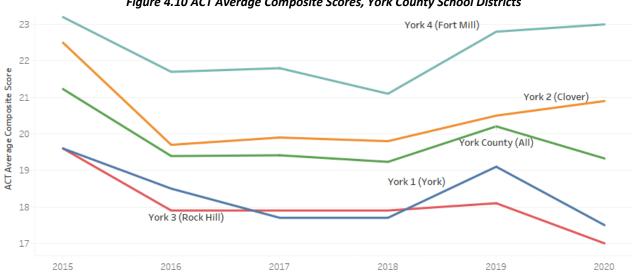
Figure 4.10 ACT Average Composite Scores, York County School Districts

Sources: ACT, South Carolina Dept of Education, North Carolina Dept of Public Instruction, Tennessee Dept of Education, Garner Economics
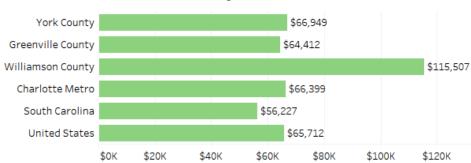
🔼 Household Income

Figure 4.11 Household Income Distribution, 2019

Source: U.S. Census Bureau, Garner Economics

Household income reflects income for residents and is an indicator of wealth in the community. York County has a concentration in middle-income levels with the highest percentage of households earning between $50,000 to $74,999 (18%) and the second-highest level earning $75,000 to $99,999 (17%).

This income distribution pattern is similar to that of Greenville County and the United States, and to a lesser extent, the Charlotte Metro and South Carolina. Williamson County has a significantly different wealth profile with high concentrations of upper-income levels. Williamson County has been ranked one of the richest counties in the nation by Forbes Magazine in 2017.
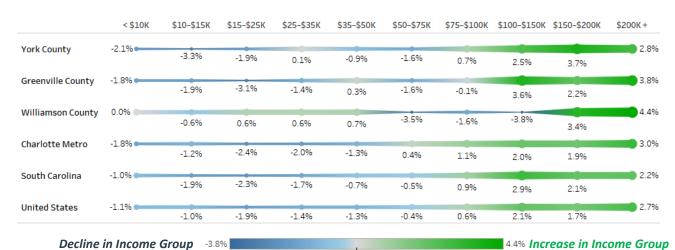
Figure 4.12 Median Household Income, 2019

York County has a median household income of $66,949, higher than all other benchmarks, with the exception of Williamson County.

Source: U.S. Census Bureau, Garner Economics

Analysis of change in the household income distribution showed positive change with all geographies growing their share of higher-income households. Overall, most of the increases were at higher income levels between 2015 and 2019. York County has more households that earned from $75,000 upward since 2015.
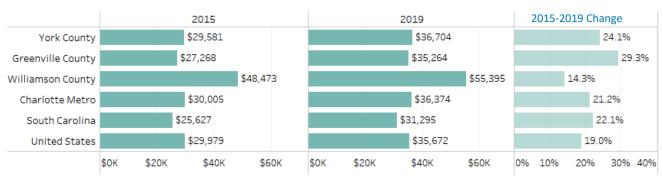
Figure 4.13 Change in Household Income, 2019

Source: U.S. Census Bureau, Garner Economics

🔼 Per Capita Income
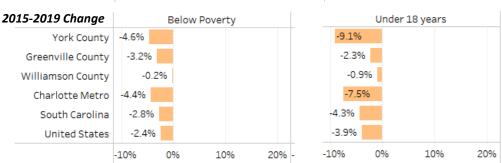
Figure 4.14 Per Capita Income

Source: U.S. Census Bureau, Garner Economics

In York County, per capita income, the average income for every person in the County, is $36,704 for 2019. This is higher than all per capita income levels for 2019, except Williamson County. York County's per capita income grew 24% since 2015, which is a higher growth rate than all benchmarks except Greenville County.

🔼 Poverty

Figure 4.15 Poverty Levels, 2019

Source: U.S. Census Bureau, Garner Economics

The measurement of poverty in a community helps to evaluate the well-being of the citizens and the state of the economy. York County's poverty rate in 2019 (8.2%) is below all other benchmarks, except Williamson County. The poverty rate for children under 18 is only slightly higher than the total poverty rate at 9.5% in 2019. York County has seen a decrease in the level of poverty between 2015 and 2019 of -4.6% and an impressive -9.1% change for children under 18.

⬆ Cost of Living

The cost of living in York County is relatively low compared to the national base of 100 and the overall cost-of-living index (in orange below) compared to benchmark communities. Franklin (Williamson County) has a high cost of housing at 169 compared to a national average of 100. Within York County, several communities have a higher cost-of-living index due to elevated housing cost (Fort Mill & Tega Cay), as shown in Table 4.6.

Figure 4.16 Cost-of-Living Index

Table 4.6 Cost-of-Living Index

County	City	Cost of Living	Goods & Services	Groceries	Health Care	Housing	Transportation	Utilities
York County	Clover	93	106	103	101	73	94	95
	Fort Mill	103	106	103	101	106	94	95
	Rock Hill	95	106	103	101	78	94	95
	Tega Cay	119	106	103	101	158	94	95
	York	92	106	103	101	70	94	95
Greenville County	Greenville	106	102	105	107	116	97	93
Williamson County	Franklin	117	97	98	92	169	91	93
Charlotte Metro	Charlotte	101	106	103	101	98	94	95
South Carolina		94	102	102	95	80	90	107
United States		100	100	100	100	100	100	100

Source: Area Vibes, Garner Economics

⬆ Crime Rate

Crime rates are a widely accepted, objective gauge of community livability. Crime rates may reflect underlying economic conditions and could signal deeper systemic problems more so than standard economic measures show. York County has relatively low crime rates compared to Greenville County, South Carolina, and the United States. Williamson County is well below all other benchmarks in both property and violent crime rates.

York County's *Property Crime Rat*e is 2,309 crimes reported per 100,000 persons, a level just above the national rate and below all others besides Williamson County. The *Violent Crime Rate* is 351.6 violent crimes reported per 100,000 persons, a rate below all benchmarks except Williamson County.

For a unilateral view of crime rates, research is based on crimes reported and published in the FBI Uniform Crime Report for 2019. The Charlotte Metro was not included in the 2019 edition of the FBI Uniform Crime Report.
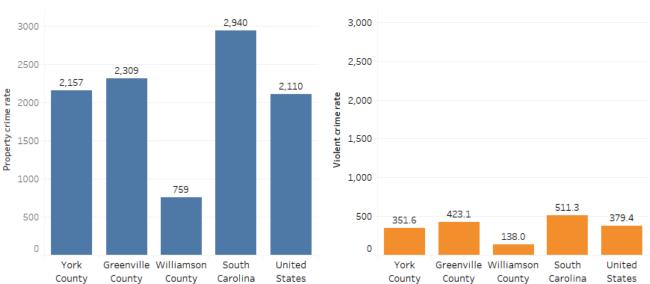
Figure 4.17 Crime Rates per 100,000 Residents, 2019

Source: Uniform Crime Reports, FBI; Garner Economics

⬆ Air Service Comparison

York County is located a short drive away from the Charlotte Douglas International Airport (CLT), the 11th busiest airport in the United States for passenger traffic. As a major hub for American Airlines, CLT is stated to have 700 daily commercial flights and 177 nonstop destinations, including 35 international cities. The airport sits on 6,000 acres and has sizable air cargo traffic along with private and corporate aviation via Wilson Air Center.

Table 4.7 Airport Comparisons

	York County	**Greenville County**	**Williamson County**
Airport Serving Area	Charlotte Douglas International Airport	Greenville Spartanburg International Airport	Nashville International Airport
Code	CLT	GSP	BNA
Runways	4	1	4
Gates	114	13	47
Commercial Passenger Airlines	11	5	15
2019 U.S. Rank (Passenger)	11	87	31
Daily Commercial Flights	700	50	540
2019 Passenger Traffic (total)	50,168,783	2,612,236	18,273,434
2019 Cargo Traffic (tons)	183,900	57,309	53,882
Nonstop Destination	177	17	75
Nonstop International Destination	35	no scheduled flights	7
Acres	6,000	3,500	3,900

Sources: Airports Council International, North America; CLT, GSP, and BNA web sites

A comparison of airports serving York County, Greenville County, and Williamson County show that the County is served well by the Charlotte Douglas Airport. Passenger traffic has grown since 2015; however, due to the COVID-19 pandemic, travel restrictions and aversion to the associated risks of travel and large meetings, passenger traffic has been down 46% compared to last year's passenger counts as of October reports. Air cargo has also grown but was declining in 2019. As of October 2020, air cargo traffic had only dropped by 5.4%.

Figure 4.18 CLT Passenger Traffic, 2015-2019

Figure 4.18 CLT Cargo Traffic, 2015-2019

Sources: CLT web site, Garner Economics

Broadband Access & Speed

Broadband access and speed have a big impact on the local economy in terms of supporting business, entrepreneurship, and educational opportunities. As we have seen in the current environment of the COVID-19 pandemic, access to broadband is crucial for a community to succeed in business and offer opportunity for success to all its residents.
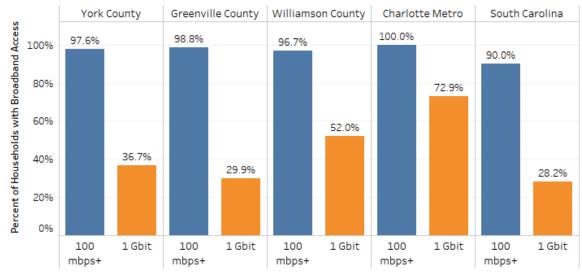
Figure 4.21 Access to Broadband Internet by Speed level, 2020

Source: BroadbandNOW, 2020, Garner Economics.

Recent data show York County's households have good access to the internet. Service with speeds of 100 megabytes per second (Mbps) are widely accessible in the County. Access to 1 Gigabit (Gbit) service is available to approximately 36.7% of households in York County. This data is aggregated by BroadbandNow and is current as of 2020. Federal statistics via BroadbandMap dated as of June 2019 show that accessibility is closer to 60%, which has been supported anecdotally via focus group feedback, particularly in the western and southern of the County. Recently, York Electric Cooperative and Comporium, an internet provider, announced their partnership to bring broadband services to the more rural parts of York County.

To further explore the quality of broadband internet in York County, speed tests performed in various ZIP codes within York County show quality speeds in the cities and towns. Claiming the fastest city or town in each benchmark county or metro, the results show that York County is competitive with its average download speed.
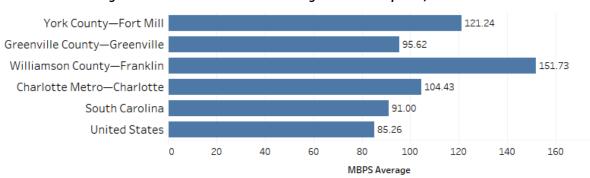
Figure 4.22 Broadband Internet Average Download Speeds, 2020

Source: BroadbandNOW, 2020, Garner Economics.

In yet another test of speed for York County, four areas in the County were examined for internet speed. Based on thousands of speed tests, each area and internet provider log average download speeds. There is at least one provider that logs speeds at 100 Mbps consistently (Figure 4.22).

Figure 4.22 Broadband Internet Average Download Speeds by Area, 2020

Source: BroadbandNOW, 2020, Garner Economics.

The analysis is based on speed tests from IP-verified users who took speed tests from an IP address in York County.

Chapter 5: Labor Force & Employment

This chapter focuses on the labor market of York County, South Carolina, beginning with the residents within the County, then exploring commuting patterns with the surrounding area and the full labor force draw within a 45-minute drive-time from multiple locations in the County. The size, shape, and transportation network in York County and the region were conducive to running dual drive-time analyses.

The data then transitions to employer-based information, including employment, industry composition, wage comparisons, and additional workplace statistics for those working in York County.

It is important to note that recent changes that are a result of the COVID-19 pandemic are beginning to be reflected in data, and those effects will be included as part of this report.

Measurements Included:

- Labor Force & Unemployment
- Labor Force Participation
- Self-Employment
- Startups
- Labor Draw Analysis
- Commuting Patterns
- Job Growth
- Industry Sector Composition
- Annual Wages
- Colleges & Universities
- Degrees Awarded

Labor Force & Unemployment

Table 5.1 Labor Force & Employment Status, 2019-2020

2019	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
Labor Force	140,458	255,903	130,215	1,369,533	2,376,069	163,539,000
Employment	136,587	249,678	127,057	1,320,922	2,308,362	157,538,000
Unemployment	3,871	6,225	3,158	48,611	67,707	6,001,000
Unemployment Rate	2.8%	2.4%	2.4%	3.5%	2.8%	3.7%
Average YTD 2020						
Labor Force	141,724	262,227	125,045	1,338,165	2,412,155	160,842,300
Employment	131,674	245,239	118,619	1,237,117	2,250,852	147,372,100
Unemployment	10,050	16,988	6,426	101,048	161,304	13,470,300
Unemployment Rate	7.1%	6.5%	5.1%	7.6%	6.7%	8.4%

Source: Bureau of Labor Statistics, Garner Economics. 2020 data is the average of available months (Jan-Sep or Oct)

York County has an average labor force of approximately 140,000 residents. The annual average unemployment level of residents of the County was a low 2.8% from 2019. The COVID-19 pandemic began affecting employment in March of 2020, and the 9-month average of data for the year leaves York County with a higher labor force of 141,700 and an unemployment rate of 7.1% (Table 5.1).

Compared to benchmarks, York County's 2019 labor force statistics are similar to most geographies with the Charlotte Metro and the United States being the only areas with an unemployment rate above 3.5%. The 2020 estimated average shows the national unemployment rate highest at 8.4% and Williamson County at 5.1%.

Figure 5.1 Unemployment Rate Trends, 2000–2019

Source: Bureau of Labor Statistics, Garner Economics. 2020 data is the average of available months (Jan-Sep or Oct)

Labor Force Participation Rate

Figure 5.1 Labor Force Participation, 2019	Figure 5.2 Change in Labor Force Participation 2015-2019

Source: U.S. Census Bureau, Garner Economics

Labor force participation rates have been dropping across the country due to the changing demographic influence of an aging population. However, a strong economy can also affect the labor force participation rate and many locations were at full employment just prior to the COVID-19 pandemic. Labor Force Participation rates for York County in 2019 are the highest among benchmarks, at 70%. Tracking growth from 2015, York County's rate grew 1.7%, which is just behind the growth rate of Greenville County. This is an excellent indicator.

There is likely to be some decline that is not yet reflected in the data due to the effects of the COVID-19 pandemic. The national monthly labor force participation rate has yo-yoed this year. In February 2020, the national labor force participation rate was 63.4%. By April, it had dropped to 60.2%, and rose after that, reaching 61.5% in June.

🔼 Labor Force Participation Rate of Families

Among York County's families, 81.8% participate in the labor force, a rate behind Williamson County and the Charlotte Metro overall. South Carolina's labor force participation rate is the lowest, at 73.7%. The largest category of family working is the Dual Income Families, about 39.1% collectively — with and without children under 18 at home.
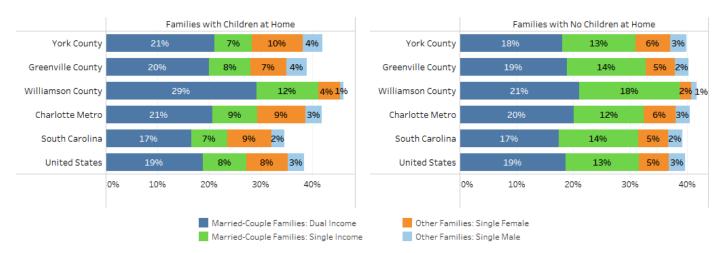
Figure 5.3 Labor Force Participation of Families, 2019

Table 5.3 Labor Force Participation of Families, 2019

	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
Families with Children Under 18 Years Living at Home						
Married-Couple Families: Dual Income	21.0%	19.9%	29.2%	20.7%	16.5%	18.8%
Married-Couple Families: Single Income	7.3%	8.1%	11.9%	8.6%	6.9%	8.4%
Other Families: Single Female	9.8%	6.9%	4.3%	9.3%	8.6%	8.0%
Other Families: Single Male	3.9%	4.0%	0.5%	3.1%	2.4%	3.2%
Families with No Children Under 18 Years Living at Home						
Married-Couple Families: Dual Income	18.1%	18.8%	21.0%	20.1%	17.4%	18.7%
Married-Couple Families: Single Income	12.9%	13.9%	17.7%	12.4%	14.0%	12.9%
Other Families: Single Female	6.0%	5.0%	2.1%	5.5%	5.3%	5.2%
Other Families: Single Male	2.8%	2.5%	0.9%	2.5%	2.5%	2.9%
Total Families in Labor Force	**81.8%**	**79.2%**	**87.6%**	**82.2%**	**73.7%**	**78.0%**

Source: U.S. Census Bureau, Garner Economics

Families Not in Labor Force

When we reverse the view of working families and look at what types of families are not participating in the workforce from the pool of residents ages 16 years and older, we see a large percentage of Married Couples with No Children at Home. This group does not have children under 18 living with them and would likely be retirees. For York County, these families not in the labor force represent about 18.2% of all families.

Some general trends regarding the lack of labor force participation from these families would include retirement, stay-at-home single parents, and those with health limitations. Single parents, particularly of younger children, may be out of the labor force by choice or lack of suitable and affordable daycare. If childcare costs are too high and available wages too low, it keeps parents out of the labor force.

This profile of non-participants may change due to the COVID-19 pandemic as well. Some workers may exit the labor force due to schools and daycares not being open for children, others may find prolonged unemployment in retail or hospitality difficult to overcome.
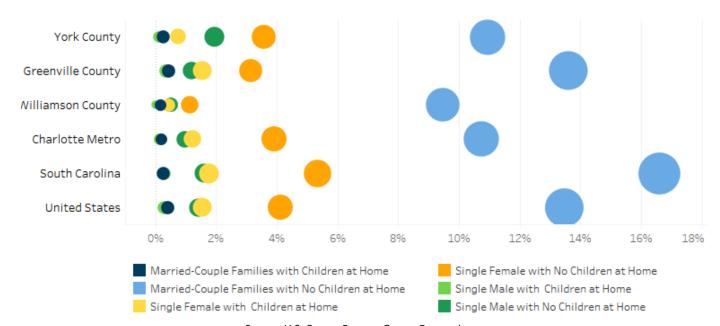
Figure 5.4 Families Not Participating in the Labor Force, 2019

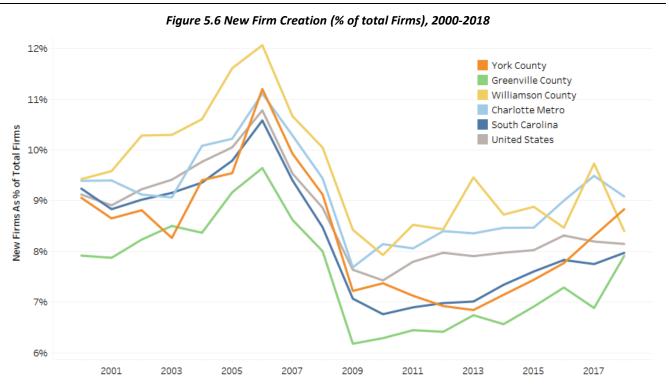*Source: U.S. Census Bureau, Garner Economics*

Self-Employment

Figure 5.5 Self-Employment, 2019

Source: U.S. Census Bureau, Garner Economics

Measuring the proportion of people who are self-employed is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism. York County has a self-employment rate of 7.9% for 2019. This measure includes self-employed individuals who are incorporated as well as those who are unincorporated or unpaid family workers. York County's self-employment rate is below all other benchmarks. All geographies saw a modest increase from 2015-2019.

Startup Activity

Figure 5.6 New Firm Creation (% of total Firms), 2000-2018

Percent of firms that are less than one year old compared to the total number of firms.
Source: U.S. Census Bureau, Business Dynamics Statistics, Garner Economics

Tracking the rate of startup firms is another good indicator of the entrepreneurial ecosystem of an area. The ability to create a new company, which establishes new jobs, bolsters the local economy. Figure 5.6 illustrates startup activity measuring newly created firms (less than one year old) as a percentage of total firms. This allows all geographies to be compared for business creation. In this perspective, York County falls in the middle of the pack of benchmarks. Figure 5.7 measures the actual number of new firms created by York, Greenville, and Williamson Counties. York County had 379 new firms created in 2018.

Figure 5.7 New Firm Creation, 2000-2018
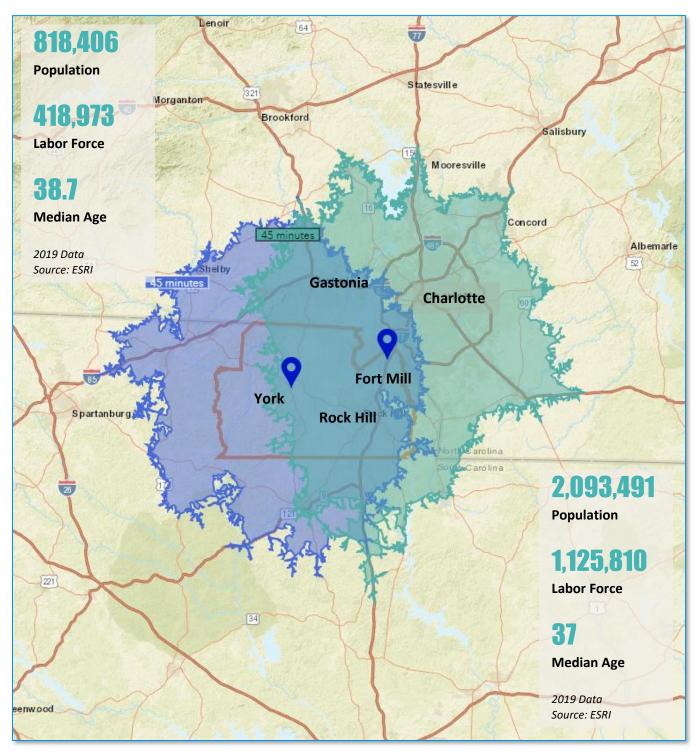
Table 5.4 County-Level Firm Startups

	2015	2016	2017	2018
York County	293	313	345	379
Greenville County	706	762	727	852
Williamson County	456	450	533	466

Source: U.S. Census Bureau, Business Dynamics Statistics, Garner Economics

Labor Draw Analysis

Figure 5.8 Dual-45 Minute Drive-Time Analyses

818,406

Population

418,973

Labor Force

38.7

Median Age

2019 Data
Source: ESRI

2,093,491

Population

1,125,810

Labor Force

37

Median Age

2019 Data
Source: ESRI
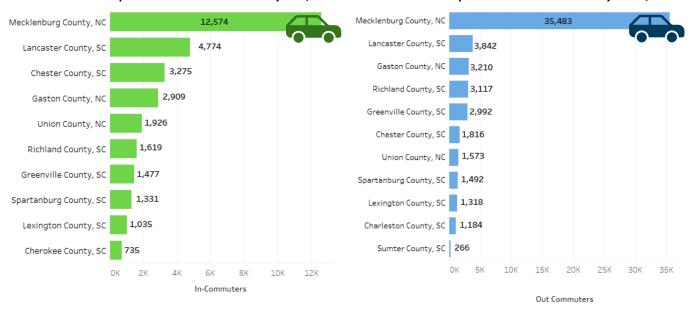
Source: ESRI, Garner Economics, 2019

➡️ Commuting Patterns

Figure 5.9 York County Commuting Patterns, 2018

45,314

In-Commuters into York County

Of the workers employed in York County,
48% came from outside.

48,762

York County Residents Live and Work in County

Of the residents employed in 2018, 58.5% commuted to jobs outside York County.

Live in York County and Commute to Jobs Outside

68,650

Figure 5.10 In-Commuting, Home County Where People Who Work in York County Live, 2018

Home County	In-Commuters
Mecklenburg County, NC	12,574
Lancaster County, SC	4,774
Chester County, SC	3,275
Gaston County, NC	2,909
Union County, NC	1,926
Richland County, SC	1,619
Greenville County, SC	1,477
Spartanburg County, SC	1,331
Lexington County, SC	1,035
Cherokee County, SC	735

Figure 5.11 Out-Commuting, Employer County Where People Who Live in York County Work, 2018

Employer County	Out Commuters
Mecklenburg County, NC	35,483
Lancaster County, SC	3,842
Gaston County, NC	3,210
Richland County, SC	3,117
Greenville County, SC	2,992
Chester County, SC	1,816
Union County, NC	1,573
Spartanburg County, SC	1,492
Lexington County, SC	1,318
Charleston County, SC	1,184
Sumter County, SC	266

*Source: 2018 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Data represent primary jobs or one job per worker.
Garner Economics*

Worker flows help define the size of a local economy's labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments. More than 45,300 workers commute into York County for work (Figure 5.9). On the flip side, just over 68,600 residents travel to work outside of the County. York County has a strong tie to Mecklenburg County with 35,000 people commuting into Mecklenburg County and 12,500 traveling into York County for work. This leaves a sizable net outflow of workers (-23,300). What is not yet evident is that the COVID-19 pandemic has affected commuting and may have a long-lasting impact on working from home options.

Commuting Trends

York County exports more workers than it retains and imports, which left a net outflow of -23,336 in 2018. The number of In-Commuters and those who Live and Work in York County have increased steadily since 2008, along with the volume of Out-Commuters.
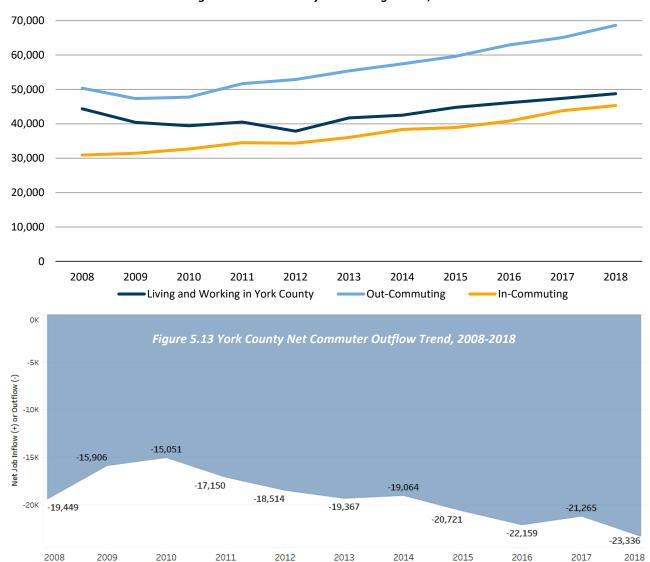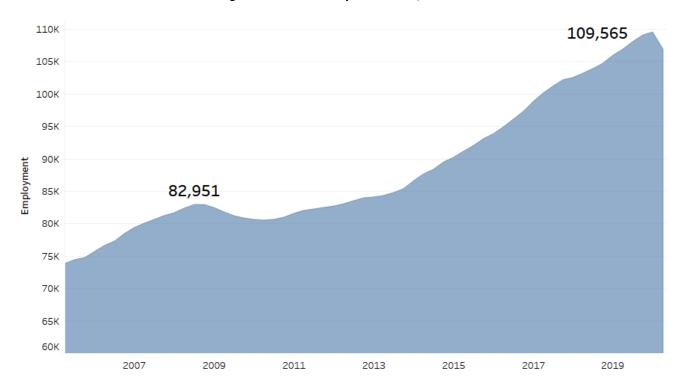
Figure 5.12 York County Commuting Trends, 2008-2018

— Living and Working in York County — Out-Commuting — In-Commuting

Figure 5.13 York County Net Commuter Outflow Trend, 2008-2018

Source: 2017 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics
2017 data commuting data does not include federal workers.

In 2018, a Winthrop University survey of commuting workers living in York County showed that 61% of jobs held by the survey participants were considered part of the Knowledge economy. Six in 10 out-commuters were willing to switch jobs to Rock Hill-based work if a similar job at the same pay rate was available. This provides an opportunity to add this group as part of the available workforce for some business targets.

Job Growth

Figure 5.14 York County Job Growth, 2015-2020

Source: JobsEQ, Garner Economics

Table 5.5 Job Growth, 5-Year Change

Region	2020 Employment (4Q Moving Average)	5-Year Employment Change (4Q Moving Average)	5-Year Employment % Change (4Q Moving Average)
York County	106,837	15,793	17.3%
Greenville County	292,095	21,336	7.9%
Williamson County	149,711	26,925	21.9%
Charlotte Metro	1,288,101	124,135	10.7%
South Carolina	2,242,443	158,322	7.6%
United States	155,169,140	5,818,583	3.9%

Source: JobsEQ, Garner Economics

Figure 5.15 Employment Historical Trends and Forecast with COVID-19 Model Recovery

Anticipated Recovery to Pre-COVID-19 Levels in Between Q3 and Q4 2021

Employment ••••• Employment Forecast — COVID-19 Employment Forecast

Source: JobsEQ

Table 5.6 Industry Composition, 2020
Highest Age Group for Each Sector in Gray

NAICS	Industry	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	USA
44	Retail	11.9%	10.4%	10.9%	10.3%	11.5%	10.2%
31	Manufacturing	10.8%	10.2%	2.7%	8.7%	11.5%	8.2%
62	Health Care & Social Assistance	9.2%	13.9%	10.9%	11.3%	12.8%	14.6%
72	Accommodation & Food Services	9.2%	8.3%	8.5%	8.3%	9.8%	8.4%
61	Educational Services	8.7%	6.1%	5.5%	6.1%	7.7%	8.2%
56	Administrative, Support, Waste Management & Remediation	6.0%	12.1%	7.7%	7.6%	7.9%	6.3%
23	Construction	5.5%	5.2%	5.5%	6.2%	5.7%	5.8%
81	Other Services	5.1%	4.5%	5.0%	4.6%	4.6%	4.4%
48	Transportation & Warehousing	4.6%	3.5%	1.5%	5.3%	3.9%	4.7%
54	Professional, Scientific & Technical Services	4.5%	6.6%	12.5%	6.6%	5.2%	6.9%
55	Management of Companies & Enterprises	4.3%	1.7%	7.6%	3.5%	1.1%	1.5%
52	Finance & Insurance	4.2%	3.9%	8.6%	6.7%	3.3%	4.1%
42	Wholesale Trade	3.9%	4.8%	2.7%	4.6%	3.3%	3.8%
92	Public Administration	3.8%	2.5%	2.4%	3.3%	5.2%	4.8%
71	Arts, Entertainment & Recreation	2.5%	1.9%	2.0%	2.1%	1.7%	1.9%
51	Information	2.1%	2.0%	3.5%	1.9%	1.3%	2.0%
53	Real Estate, Rental & Leasing	1.8%	1.7%	1.9%	1.8%	1.7%	1.8%
22	Utilities	1.0%	0.3%	0.2%	0.4%	0.7%	0.5%
11	Agriculture, Forestry, Fishing & Hunting	0.8%	0.2%	0.5%	0.5%	0.9%	1.3%
21	Mining, Quarrying, Oil & Gas Extraction	0.0%	0.0%	0.0%	0.1%	0.1%	0.4%

Source: JobsEQ

York County's top industry sector by employment is in Retail with 11.9% of the County's workers. Manufacturing is next with 10.8%, then Health Care and Social Assistance with 9.2% of total employment including government. York County, along with the benchmarks, has a diversified employment base with no industry employing more than 15% of its workforce.
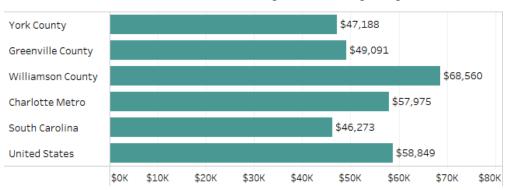
⮞ **Annual Wages**

Table 5.7 Average Wage Growth

Year	York County	Greenville County	Williamson County	Charlotte Metro	South Carolina	United States
2015 (Q2) *Adjusted for Inflation*	43,058	47,386	64,527	55,073	43,876	55,374
2020 (Q2)	47,188	49,091	68,560	57,975	46,273	58,849
Average Wage Increase	4,130	1,705	4,032	2,902	2,397	3,475
Percent Increase	10%	4%	6%	5%	5%	6%

Figure 5.16 Average Wage, 2020

In 2020, the estimated average wage per job in York County equaled $47,188 annually. It should be noted that wage applies only to employment in York County and does not measure wages for those workers who live in the County but commute outside the area.

York County's average annual wage is the lowest among the benchmark geographies with the exception of South Carolina. York County's wages grew 10% after adjusting for inflation. This growth rate was the highest among benchmarks. Figure 5.17 illustrates fairly flat wage growth after making adjustments for inflation.

Figure 5.17 Average Wage Growth Adjusted for Inflation

Source: JobsEQ, Garner Economics

⬆ Colleges & Universities

Figure 5.18 Colleges & Universities in 45-Minute Drive-Time Reach

York County is home to several colleges or university campuses within its boundaries, including Winthrop University, Clinton College, and York Technical College. However, 25 schools within 45 minutes of points within York County boost the talent pool of the County. Total enrollment for these institutions surpasses 100,000 and more than 20,000 degrees or credentials have been awarded.

Table 5.8 lists colleges and universities in the area and they are also depicted on the map in Figure 5.18 above. Colleges on this list offer certificates under two years upward to doctoral degrees in a variety of programs. The largest detractor to this large number of students is the competition for talent in the area, particularly as the majority of institutions are located within Charlotte.

Additional and detailed information on colleges and universities will be included in the Workforce Mapping initiative in Chapter 7.

Table 5.8 College & University Enrollment, 2019 (45-Minute Drive-Time of York County)
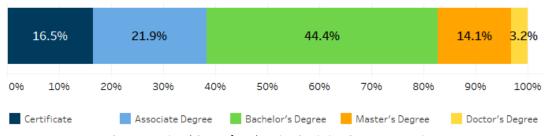
Institution Name	Sector of institution	Undergraduate Enrollment 2019	Graduate Enrollment 2019	Total Enrollment 2019
Limestone College	Private not-for-profit, 4-year +	2,662	96	2,758
Cleveland Community College	Public, 2-year	3,715		3,715
Gardner-Webb University	Private not-for-profit, 4-year +	2,228	1,886	4,114
Belmont Abbey College	Private not-for-profit, 4-year +	1,677		1,677
Gaston College	Public, 2-year	8,484		8,484
University of South Carolina-Lancaster	Public, 2-year	2,107		2,107
Carolinas College of Health Sciences	Public, 4-year +	661		661
Central Piedmont Community College	Public, 2-year	29,279		29,279
Chamberlain University-North Carolina	Private for-profit, 4-year +	259		259
Davidson College	Private not-for-profit, 4-year +	2,006		2,006
DeVry University-North Carolina	Private for-profit, 4-year +	115	75	190
Johnson & Wales University-Charlotte	Private not-for-profit, 4-year +	1,832		1,832
Johnson C Smith University	Private not-for-profit, 4-year +	1,627	101	1,728
Queens University of Charlotte	Private not-for-profit, 4-year +	2,053	1,003	3,056
University of North Carolina at Charlotte	Public, 4-year +	27,497	6,527	34,024
University of Phoenix-North Carolina	Private for-profit, 4-year +	68	11	79
University of South Carolina-Union	Public, 2-year	1,445		1,445
Wingate University	Private not-for-profit, 4-year +	2,832	1,043	3,875
Clinton College	Private not-for-profit, 4-year +	249		249
Winthrop University	Public, 4-year +	5,422	1,379	6,801
York Technical College	Public, 2-year	5,819		5,819
Carolina School of Broadcasting	Private for-profit, less than 2-year	70		70
Southeastern Institute-Charlotte	Private for-profit, less than 2-year	553		553

Source: National Center for Education Statistics, Garner Economics

Degrees Awarded

Figure 5.19 Credentials Granted by Type, 2019

Source: National Center for Education Statistics, Garner Economics

Table 5.9 College & University Credentials Awarded, 2019 (45-Minute Drive-Time of York County)

Program Area	2019 Credentials Awarded
Business, Management, Marketing, and Related Support Services	7,288
Health Professions and Related Programs	5,866
Liberal Arts and Sciences, General Studies and Humanities	5,014
Education	3,792
Computer and Information Sciences and Support Services	2,600
Personal and Culinary Services	1,856
Social Sciences	1,478
Psychology	1,408
Homeland Security, Law Enforcement, Firefighting, and Related Protective Service	1,342
Communication, Journalism, and Related Programs	1,328
Engineering	1,312
Biological and Biomedical Sciences	1,218
Engineering Technologies and Engineering-related Fields	1,210
Parks, Recreation, Leisure and Fitness Studies	1,074
Public Administration and Social Service Professions	960
Visual and Performing Arts	944
Mechanic and Repair Technologies/Technicians	790
English Language and Literature/Letters	718
Mathematics and Statistics	580
Precision Production	554
Physical Sciences	498
History	444
Family and Consumer Sciences/Human Sciences	418
Multi/Interdisciplinary Studies	390
Foreign Languages, Literatures, and Linguistics	308
Construction Trades	282
Architecture and Related Services	236
Communications Technologies/Technicians and Support Services	202
Legal Professions and Studies	190
Philosophy and Religious Studies	186
Area, Ethnic, Cultural, Gender, and Group Studies	132

Source: National Center for Education Statistics, Garner Economics

Chapter 6: Local Specialization & Growth

The following section provides a more detailed and in-depth assessment of York County. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The main goals are to provide historical context, reveal areas of unique specialization, and help uncover emerging trends and opportunities. The two main areas of analysis are major industries and occupational groups.
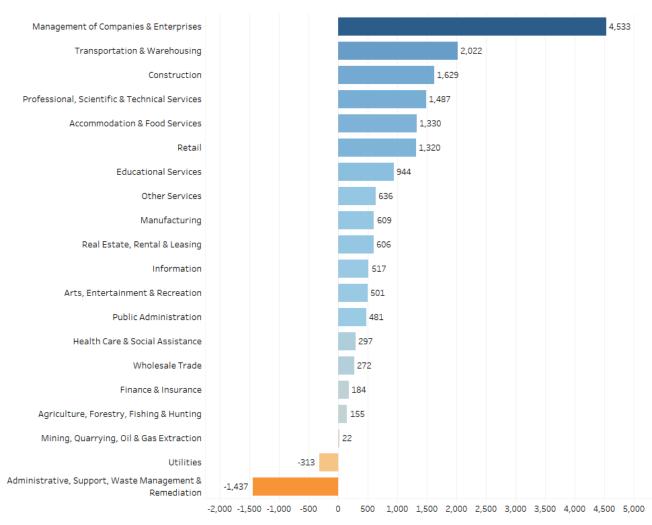
Measurements Included

- Major industry sector change
- Industry earnings
- Occupational change
- Occupational earnings
- Local specialization & growth, shift-share analysis

Major Industry Sector Change

Figure 6.1 York County Employment Change by Major Industry, 5-Year Change (2020)
Ranked by Absolute Change

Source: JobsEQ, Garner Economics

The largest absolute industry job gains in York County over the past five years came from *Management of Companies & Enterprises,* which grew exponentially, adding 4,500 jobs. All but two sectors experienced growth during this period. Other sectors that had substantial growth include *Transportation & Warehousing* (+2,022 jobs); *Construction* (+1,629 jobs)*; and *Professional, Scientific & Technical Services* (+1,487 jobs).

Two sectors experienced job loss over the past five years: *Utilities* (-313 jobs) and *Administrative, Support, Waste Management & Remediation* (-1,437 jobs). Overall, York County had a net increase of more than 15,700 jobs, which includes employment that is considered covered.

Table 6.1 York County Employment Change by Major Industry, 5-Year Change (2020)
Ranked by Absolute Change

Industry	2020 Employment (4Qtr Avg)	5-Year Change in Employment	5-Year % Change in Employment
Management of Companies & Enterprises	4,626	4,533	4879.3%
Transportation & Warehousing	4,893	2,022	70.5%
Construction	5,878	1,629	38.3%
Professional, Scientific & Technical Services	4,769	1,487	45.3%
Accommodation & Food Services	9,864	1,330	15.6%
Retail	12,673	1,320	11.6%
Educational Services	9,258	944	11.4%
Other Services	5,473	636	13.1%
Manufacturing	11,560	609	5.6%
Real Estate, Rental & Leasing	1,943	606	45.3%
Information	2,209	517	30.6%
Arts, Entertainment & Recreation	2,647	501	23.4%
Public Administration	4,008	481	13.6%
Health Care & Social Assistance	9,876	297	3.1%
Wholesale Trade	4,183	272	7.0%
Finance & Insurance	4,516	184	4.3%
Agriculture, Forestry, Fishing & Hunting	893	155	21.0%
Mining, Quarrying, Oil & Gas Extraction	53	22	68.0%
Utilities	1,070	-313	-22.6%
Administrative, Support, Waste Management & Remediation	6,445	-1,437	-18.2%
Total—All Industries	**106,837**	**15,793**	**17.3%**

Source: JobsEQ, Garner Economics

Industry Earnings

A comparison of York County's average industry earnings to national averages offers insights into areas of cost-saving opportunities. The average annual wage for all industries in York County is $47,188, which is 25% below the national average of $58,849. All but two industry sector wages reported for the County are well below national averages. *Utility* wages are 28% above national levels and *Real Estate, Rental & Leasing* wages are also above the nation. Wages for the *Arts, Entertainment & Recreation* industry in York County are 152% lower than national levels.

Table 6.2 York County Average Annual Industry Salary Comparison, 2020
Ranked by Highest Local Wages
Wages Higher than National are Highlighted in Gray

Industry	Average Wages	U.S. Average Wages per Worker	Percent Difference
Agriculture, Forestry, Fishing & Hunting	$27,820	$39,167	-41%
Mining, Quarrying, Oil & Gas Extraction	$66,972	$107,740	-61%
Utilities	$142,389	$102,419	28%
Construction	$53,229	$61,580	-16%
Manufacturing	$62,781	$70,234	-12%
Wholesale Trade	$70,580	$81,080	-15%
Retail	$30,555	$34,181	-12%
Transportation & Warehousing	$42,612	$54,246	-27%
Information	$75,150	$114,698	-53%
Finance & Insurance	$77,768	$112,677	-45%
Real Estate, Rental & Leasing	$67,134	$62,321	7%
Professional, Scientific & Technical Services	$62,819	$99,101	-58%
Management of Companies & Enterprises	$89,929	$127,443	-42%
Administrative, Support, Waste Management & Remediation	$36,083	$42,899	-19%
Educational Services	$39,184	$52,571	-34%
Health Care & Social Assistance	$45,826	$54,090	-18%
Arts, Entertainment & Recreation	$15,855	$39,981	-152%
Accommodation & Food Services	$16,592	$23,285	-40%
Other Services	$28,536	$34,650	-21%
Public Administration	$43,676	$68,581	-57%
Total—All Industries	**$47,188**	**$58,849**	**-25%**

Source: JobsEQ, Garner Economics

Figure6.2 York County Average Annual Industry Salary Comparison, 2020
Ranked by Highest Local Wages

Industry	Wage
Utilities	$142,389
Management of Companies & Enterprises	$89,929
Finance & Insurance	$77,768
Information	$75,150
Wholesale Trade	$70,580
Real Estate, Rental & Leasing	$67,134
Mining, Quarrying, Oil & Gas Extraction	$66,972
Professional, Scientific & Technical Services	$62,819
Manufacturing	$62,781
Construction	$53,229
Total—All Industries	$47,188
Health Care & Social Assistance	$45,826
Public Administration	$43,676
Transportation & Warehousing	$42,612
Educational Services	$39,184
Administrative, Support, Waste Management & Remediation	$36,083
Retail	$30,555
Other Services	$28,536
Agriculture, Forestry, Fishing & Hunting	$27,820
Accommodation & Food Services	$16,592
Arts, Entertainment & Recreation	$15,855

U.S. Average

Average Annual Wages

Source: JobsEQ, Garner Economics

Major Occupational Change

Over the last five years, York County saw job gains in all but one occupational group — Production (-48 jobs). The top occupational groups that grew include *Office & Administrative Support* (+1,780); *Transportation & Material Moving* (-34 jobs); *Management* (+1,663); *Business & Financial Operations* (+1,560); and *Sales & Related Occupations* (+1,546). These occupational gains match up with the *Management of Companies & Enterprises* industry sector growth during the same period in York County.

Figure 6.3 York County Employment Change by Occupational Group, 5-Year Change (2020)

Source: JobsEQ, Garner Economics

Table 6.3 York County Employment Change by Occupational Group, 5-Year Change (2020)

Ranked by Absolute Change

Occupation	2020 Employment (4Qtr Avg)	5-Year Change in Employment	5-Year % Change in Employment
Office & Administrative Support	14,108	1,780	14.4%
Transportation & Material Moving	10,051	1,768	21.3%
Management	6,184	1,663	36.8%
Business & Financial Operations	5,016	1,560	45.1%
Sales & Related	12,015	1,546	14.8%
Food Preparation & Serving Related	9,650	1,126	13.2%
Construction & Extraction	4,669	1,079	30.1%
Computer & Mathematical	2,472	927	60.0%
Installation, Maintenance & Repair	4,667	710	18.0%
Education, Training & Library	6,526	672	11.5%
Building, Grounds Cleaning & Maintenance	3,420	544	18.9%
Personal Care & Service	3,277	476	17.0%
Arts, Design, Entertainment, Sports & Media	1,732	336	24.1%
Architecture & Engineering	2,155	323	17.6%
Healthcare Support	3,281	305	10.2%
Protective Service	1,769	256	16.9%
Community & Social Service	1,774	244	15.9%
Legal	645	174	36.9%
Farming, Fishing & Forestry	416	140	50.6%
Healthcare Practitioners & Technical	4,144	129	3.2%
Life, Physical & Social Science	585	84	16.9%
Production	8,283	-48	-0.6%
Total—All Occupations	106,837	15,793	17.3%

Source: JobsEQ, Garner Economics

Occupational Earnings

Figure 6.4 York County Average Annual Occupational Salary Comparison, 2020
Ranked by Highest Local Wages

Occupation	Average Annual Wages
Management	$114,600
Legal	$100,000
Computer & Mathematical	$79,200
Architecture & Engineering	$76,700
Business & Financial Operations	$73,200
Healthcare Practitioners & Technical	$72,100
Life, Physical & Social Science	$66,200
Arts, Design, Entertainment, Sports & Media	$52,800
Installation, Maintenance & Repair	$45,600
Total—All Occupations	$45,600
Community & Social Service	$44,700
Education, Training & Library	$41,800
Sales & Related	$40,100
Protective Service	$39,300
Construction & Extraction	$39,000
Production	$37,900
Office & Administrative Support	$37,500
Transportation & Material Moving	$30,300
Farming, Fishing & Forestry	$28,300
Healthcare Support	$27,100
Personal Care & Service	$26,700
Building, Grounds Cleaning & Maintenance	$26,400
Food Preparation & Serving Related	$22,500

U.S. Average

Source: JobsEQ, Garner Economics

Table 6.4 York County Average Annual Occupational Salary Comparison, 2020
Ranked by Highest Local Wages

Occupation Group	Average Annual Wages	United States Wages	Percent Difference
Management	$114,600	$117,300	-2%
Business & Financial Operations	$73,200	$78,700	-8%
Computer & Mathematical	$79,200	$93,800	-18%
Architecture & Engineering	$76,700	$88,800	-16%
Life, Physical & Social Science	$66,200	$78,000	-18%
Community & Social Service	$44,700	$50,500	-13%
Legal	$100,000	$113,300	-13%
Education, Training & Library	$41,800	$57,200	-37%
Arts, Design, Entertainment, Sports & Media	$52,800	$62,200	-18%
Healthcare Practitioners & Technical	$72,100	$84,500	-17%
Healthcare Support	$27,100	$30,900	-14%
Protective Service	$39,300	$49,900	-27%
Food Preparation & Serving Related	$22,500	$26,700	-19%
Building, Grounds Cleaning & Maintenance	$26,400	$31,700	-20%
Personal Care & Service	$26,700	$31,000	-16%
Sales & Related	$40,100	$44,400	-11%
Office & Administrative Support	$37,500	$41,100	-10%
Farming, Fishing & Forestry	$28,300	$30,900	-9%
Construction & Extraction	$39,000	$52,000	-33%
Installation, Maintenance & Repair	$45,600	$50,000	-10%
Production	$37,900	$40,200	-6%
Transportation & Material Moving	$30,300	$37,900	-25%
Total—All Occupations	$45,600	$54,200	-19%

Major Industry Sector Specialization & Growth
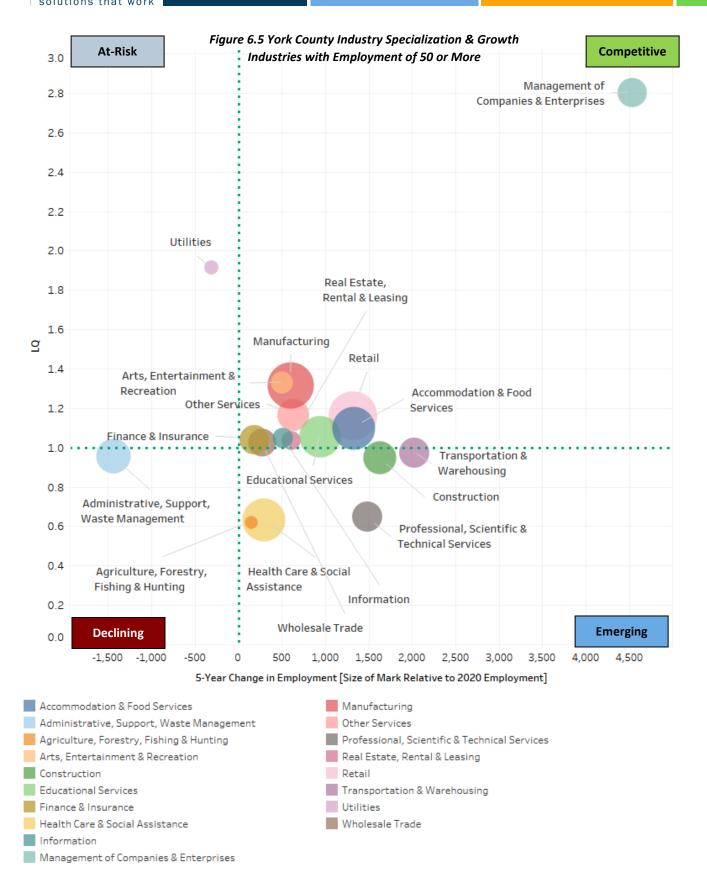
Major industry sector specialization focuses on the geographic concentrations of similar industries. For many sectors, there exist interconnections between suppliers, occupations, and associated supporting institutions.

- Eleven industry sectors have a local specialization greater than one and experienced job growth in the past five years in York County. These make up the Competitive category and can be found below under the green heading.
- Seven industry sectors had local specialization below one, but experienced job growth within the past five years and are considered Emerging. They can be found below under the orange heading.
- Only one sector is classified as Declining due to job loss and low local specialization — *Administrative, Support, Waste Management & Remediation.*
- One industry sector is considered At-Risk because of a combination of high LQ and job loss in the last five years. This sector is *Utilities*.

Table 6.5 York County Industry Specialization and Growth

Industry Sector	5-Year Employment Change	2020 Employment	2020 Location Quotient
Competitive			
Management of Companies & Enterprises	4,533	4,626	2.80
Arts, Entertainment & Recreation	501	2,647	1.33
Manufacturing	609	11,560	1.31
Other Services	636	5,473	1.17
Retail	1,320	12,673	1.16
Accommodation & Food Services	1,330	9,864	1.10
Educational Services	944	9,258	1.05
Information	517	2,209	1.05
Finance & Insurance	184	4,516	1.04
Real Estate, Rental & Leasing	606	1,943	1.04
Wholesale Trade	272	4,183	1.03
Emerging			
Transportation & Warehousing	2,022	4,893	0.97
Construction	1,629	5,878	0.95
Public Administration	481	4,008	0.78
Professional, Scientific & Technical Services	1,487	4,769	0.65
Health Care & Social Assistance	297	9,876	0.63
Agriculture, Forestry, Fishing & Hunting	155	893	0.62
Mining, Quarrying, Oil & Gas Extraction	22	53	0.12
Declining			
Administrative, Support, Waste Management & Remediation	-1,437	6,445	0.96
At-Risk			
Utilities	-313	1,070	1.91

Source: JobsEQ, Garner Economics

Figure 6.5 York County Industry Specialization & Growth Industries with Employment of 50 or More

At-Risk

Competitive

LQ

Management of
Companies & Enterprises

Utilities

Real Estate,
Rental & Leasing

Manufacturing

Retail

Arts, Entertainment &
Recreation

Other Services

Accommodation & Food
Services

Finance & Insurance

Transportation &
Warehousing

Administrative, Support,
Waste Management

Educational Services

Construction

Professional, Scientific &
Technical Services

Agriculture, Forestry,
Fishing & Hunting

Health Care & Social
Assistance

Information

Declining

Wholesale Trade

Emerging

5-Year Change in Employment [Size of Mark Relative to 2020 Employment]

Accommodation & Food Services

Manufacturing

Administrative, Support, Waste Management

Other Services

Agriculture, Forestry, Fishing & Hunting

Professional, Scientific & Technical Services

Arts, Entertainment & Recreation

Real Estate, Rental & Leasing

Construction

Retail

Educational Services

Transportation & Warehousing

Finance & Insurance

Utilities

Health Care & Social Assistance

Wholesale Trade

Information

Management of Companies & Enterprises

Source: JobsEQ, Garner Economics

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors. In this analysis, major occupational groups are evaluated for their growth and concentration.

- Eight occupational groups have a local specialization greater than one and experienced job growth in the past five years in York County. These make up the Competitive category and are below under the green heading.
- Fourteen occupations had local specialization below one but experienced job growth within the past five years and are considered Emerging. They are below under the orange heading.
- One occupational group is considered At-Risk due to an LQ of one or more, but experienced job losses in the last five years — *Production Occupation*. There are no occupational groups that are considered Declining.

Table 6.6 York County Occupational Specialization and Growth

Occupational Group	5-Year Employment Change	2020 Employment	2020 Location Quotient
Competitive			
Architecture & Engineering	323	2,155	1.17
Sales & Related	1,546	12,015	1.16
Transportation & Material Moving	1,768	10,051	1.14
Installation, Maintenance & Repair	710	4,667	1.13
Personal Care & Service	476	3,277	1.13
Food Preparation & Serving Related	1,126	9,650	1.12
Education, Training & Library	672	6,526	1.08
Office & Administrative Support	1,780	14,108	1.03
Emerging			
Community & Social Service	244	1,774	0.96
Building, Grounds Cleaning & Maintenance	544	3,420	0.94
Construction & Extraction	1,079	4,669	0.94
Arts, Design, Entertainment, Sports & Media	336	1,732	0.90
Management	1,663	6,184	0.89
Business & Financial Operations	1,560	5,016	0.84
Computer & Mathematical	927	2,472	0.76
Protective Service	256	1,769	0.76
Legal	174	645	0.71
Healthcare Support	305	3,281	0.70
Healthcare Practitioners & Technical	129	4,144	0.67
Life, Physical & Social Science	84	585	0.63
Farming, Fishing & Forestry	140	416	0.61
Community & Social Service	244	1,774	0.96
At-Risk			
Production	-48	8,283	1.32

Source: JobsEQ, Garner Economics

Figure 6.5 York County Occupational Specialization & Growth
Occupation Groups with Employment of 1,000 or More.

Source: JobsEQ, Garner Economics

Chapter 7: Nontraditional Data & Measures

Cost of living, crime, and other measures figure into the evaluation of a community in addition to economic and demographic data. Another way to look at the vibe and attractiveness of an area includes some nontraditional data to measure the livability and welcoming nature of the community. There is a growing recognition that being welcoming leads to prosperity. Below is a review of some third-party rankings and scores offering another view of York County in subjects from walkability to weirdness.

Figure 7.1 Comparative Nontraditional Rankings

	Fort Mill or Rock Hill (York County)	Greenville (Greenville County)	Franklin (Williamson County)
Average Walk Score (City-Level)	Walk Score **43** (Fort Mill)	Walk Score **43**	Walk Score **23**
Average Bike Score (City-Level)	Bike Score **46** (Fort Mill)	Bike Score **41**	Bike Score **30**
Human Rights Campaign Municipal Equality Index (City-Level)	**17** (Rock Hill)	**33**	**19**
Weirdness Index (Metro-Level)	**107.6** (Charlotte Metro)	**116.9** (Greenville Metro)	**109.7** (Nashville Metro)
Wallet Hub Most Diverse Cities in America (Rank 1= Most Diverse)	**65.39** (Rock Hill: rank 185)	**64.77** (rank 228)	**64.87** (rank 221)

Please see the following two pages for more details on these measures.

Walk Score

Walk Score is a branded measure of the walkability to nearby amenities analyzing walking routes. Amenities within a 5-minute walk (.25 miles) are given maximum points, with no points given after a 30-minute walk. Walk Score also measures pedestrian friendliness by analyzing population density and road metrics.[5]

Fort Mill has a Walk Score of 43, which is the same as Greenville and higher than Franklin benchmarks. Rock Hill has a Walk Score of 29. For comparison, Charlotte has an average Walk Score of 26, New York—the top-ranked city in this measure—has a Walk Score of 88. Neighborhoods within a city will score differently; however, an overall average will give an indicator of the walkability of the city for those looking for this factor. Scores are from 0 to 100.

Bike Score

The Bike Score, another Walk Score ranking, conveys whether a location is good for biking. For a given location, a Bike Score is calculated by measuring bike infrastructure (lanes, trails, etc.), hills, destinations, and road connectivity as well as the number of bike commuters. Component scores are based on data from the United States Geological Survey, Open Street Map, and the U.S. Census.

Fort Mill has a Bike Score of 46, higher than both Greenville and Franklin. Rock Hill's Bike Score is 33. The nation's top score is in Minneapolis at 82. Scores are from 0 to 100.

Municipal Equality Index

Human Rights Campaign Municipal Equality Index rates a city's welcoming environment based on 49 different criteria. [6] The index examines how inclusive municipal laws, policies, and services are of LGBTQ people who live and work there. This includes nondiscrimination laws, the municipality as an employer, municipal services, law enforcement, and the city leadership's public position on equality.

The City of Rock Hill's score is 17 with Franklin's score slightly higher at 19 and Greenville scored 33 points in the 2020 index. Scores are from 0 to 100, with the high scores being more favorable in terms of ranking city-level law and policy with 100 standard points and 22 bonus points available.

Weirdness

Weirdness Index measures the extent to which a metropolitan area's distinctive consumer behavior differs from the national average.[7] This is part of the "Your Distinctive City" measure in the City Vitals 2018 report prepared by CEOs for Cities. This section reviews disposable income expenditures for city residents, creating a consumption pattern.

Variations in these patterns reflect pronounced regional and local preferences. City distinctiveness or weirdness is enumerated from the marketing data on consumption patterns presented. The national average equals 100.

The Charlotte Metro has an index of 107.6 compared to Nashville Metro's 109.7 score and Greenville Metro's 116.9 score. Scores are available for metro areas only with Rock Hill and York County being in the Charlotte Metro, Franklin within the Nashville Metro, and Greenville measured as the whole metro.

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[5] Walk Score is a part of Redfin; www.walkscore.com.
[6] Human Rights Campaign 2020 Municipal Equality Index; https://www.hrc.org/mei.
[7] Weirdness Index is part of CityVitals 3.0 published by CEO for Cities.

Diversity Index

WalletHub states that economies generally fare better when they openly embrace and capitalize on new ideas. Their Diversity Index measures relevant statistics across five categories: Socioeconomic Diversity, Cultural Diversity, Economic Diversity, Household Diversity, and Religious Diversity.[8]

Rock Hill's score is 65.39 out of 100 and ranks 185th among small-sized communities. Franklin's score is 64.87 (rank #221) and Greenville rates a 64.77 (rank #228), both in the small-sized community category. A score of 100 represents the most diversity.

Chapter 8: York County Workforce Development Delivery System
(Mapping the talent pipeline)

The workforce development delivery system is defined as the education and training assets that prepare the workforce. An electronic survey was conducted by Garner Economics that included questions on the York County workforce development delivery system. The survey respondents were organized into three categories, for-profit businesses; nonprofit organizations that included government, education and others; and entrepreneurs/startups. The survey results showed that 69.8% of respondents were for-profit businesses and entrepreneur or startup companies. To gain insights into how business leaders viewed the current workforce and the county's workforce development delivery system, the responses from for-profit businesses and entrepreneurs/startups were aggregated.

The first workforce survey question asked about the effectiveness of the current workforce development delivery system. When asked how effective the system is, on a scale of one to five, where five is highly effective and one is not effective, 62.1% of these business leaders rated the effectiveness of the system as "average" with another 23% rating it as "effective."

These leaders were asked whether York County had the workforce development delivery system to support existing businesses. Slightly over two-thirds of these respondents (69.2%) believe the current workforce development delivery system can support existing businesses. Respondents were then queried whether the current system can support new business locations and investment. Only about half (50.6%) of these survey respondents felt the system could support new business and industry. When asked to describe the current labor situation in the area in terms of BOTH quality AND availability, 28.7% of these business leaders said the County lacked available skilled labor, and another 20.1% said the County had a small local labor pool.

With having this insight into the local business leaders' perspective on the current workforce, the following narrative maps this system into two categories: the long-term and the short-term talent pipeline development.

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[8] WalletHub 2018's Most Diverse Cities in the U.S. https://wallethub.com/edu/most-diverse-cities/12690/.

ASSET MAPPING THE SYSTEM

The workforce development service delivery assessment evaluated the long- and short-term talent pipeline development in York County. The long-term talent pipeline development is defined as the traditional career pathway from high school to college to work, or from high school to work. The short-term talent pipeline development is the collection of education and training programs designed to prepare the workforce for employment in a timeframe that usually varies from weeks to up to two years. High school apprenticeship programs are evaluated for high school student participation and included in the short-term talent pipeline. A flowchart depicting the current workforce development delivery system for the area is found below, followed by the narrative.
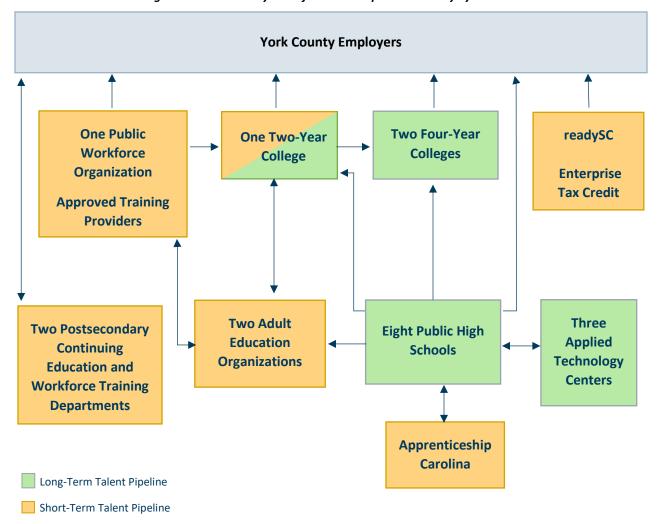
Figure 8.1 York County Workforce Development Delivery System Flowchart

LONG-TERM TALENT PIPELINE DEVELOPMENT

Long-term talent pipeline development looks at the preparedness of public high school students for college and career and provides a snapshot of the number of graduating students choosing in-state colleges, and where possible, which area colleges they are selecting. As part of the long-term pipeline, Garner Economics reviewed the estimated number of graduating students entering the workforce and a summary of the region's colleges, including total enrollments, tuition and fees, and top programs of study. The summary intends to provide insights into how the region is developing talent through the traditional education process.

High Schools

There are a total of eight public high schools in four school districts across the County. One of those high schools, Catawba Ridge, has just opened in the fall of 2019 and will not graduate a full class of seniors until 2022 and is too new to include in the analysis. Of the seven high schools evaluated, approximately 3,000 students graduated in 2019 with approximately 500, or 17%, directly entering the workforce. The graduation rate of York County high schools is 87.0%, which is above the state average of 81.1%.[9]

South Carolina ranks high schools on performance areas including academic achievement, end-of-course testing, college and career readiness, graduation rate, English language proficiency, and school environment. It groups the schools in one of five categories: Excellent, Good, Average, Below Average and Unsatisfactory. See the table below for the respective rankings.

College and Career Readiness

In South Carolina, the College and Career Readiness Indicator comprises 25% of the schools' ranking and evaluates whether students who are graduating from high school are prepared for college or careers after graduating.[10] This metric comprises various parameters, which include:

- Achieving ACT (≥ 20) and SAT (≥1020) college readiness scores

- Participating in and completing Dual Enrollment (6 credits with grade ≥C) and Advanced Placement (AP) courses (≥3)

- Completing a Career and Technical Education (CTE) career pathway as indicated by earning a state or national credential

- Earning a Silver, Gold, or Platinum on the career readiness certificate state-approved assessment (WIN Ready to Work Certificate)

- Successful completion of state-approved work-based learning programs

- Other criteria include International Baccalaureate assessment (≥4) and ASVAB assessment (≥31)

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[9] South Carolina School Report Cards, SC Department of Education website (https://screportcards.ed.sc.gov/).
[10] *Guide to the 2018 SC School Report Cards*, SC Education Oversight Committee.

Table 8.1 2018-2019 Summary Rankings and College Readiness Data for York County High Schools

High School	Ranking	Completers	% Completers Meeting One College Readiness Benchmark	% Completers ACT ≥ 20*	% Completers Meeting One Career Readiness Benchmark
Fort Mill High School	80-Excellent	534	71.5	38.8	84.3
Nation Ford High School	75-Excellent	493	62.3	42.4	78.3
Clover High School	66-Good	528	50.2	31.8	76.3
York Comprehensive High School	60-Good	286	49.3	30.4	71.7
Northwestern High School	59-Average	407	41.3	21.4	70.0
South Pointe High School	54-Average	319	34.5	20.7	59.9
Rock Hill High School	53-Average	406	40.4	17.2	70.2

Source: South Carolina School Report Cards, SC Department of Education, 2018–19
*78% of SC high school students take the ACT exam[11]

Garner Economics looked at the success of these graduating students that immediately enrolled in college. Nearly 2,200 of the 3,000 graduates or about 73% of these high school completers were enrolled in college for the 2019 fall semester. Most students (1,821) attended an in-state college or university while 362 chose an out-of-state one. Out of the 1,821 students attending an in-state college or university, 532 chose to attend a technical college.[12] York County high school diploma completers enroll at four-year and out-of-school colleges at a higher rate than the state average.

Table 8.2 Comparison of York County 2018-2019 High School Completers to State

2018-2019 High School Completers	York County	State
Total High School Completers	3,054	45,598
High School Graduation Rate	87.0	81.1
Percent College Freshman	69.7	67.1
Percent Completers Entering 4-Year College	42	38.6
Percent Completers Entering Technical College*	17.5	21.1
Percent College Freshman Attending In-State College	83.4	88.4
Percent College Freshman Attending Out-of-State College	16.5	11.6

*Includes Degree, Diploma, and Certificate Programs
Source: College Freshman Report, Graduating Class of 2019, South Carolina Department of Education

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[11] [The Condition of College & Career Readiness 2019 South Carolina Key Findings (act.org).](#)
[12] College Freshman Report, Graduating Class of 2019, South Carolina Department of Education.

College Preferences

Top college choices for 2018-19 York County high school completers were York Technical College, University of South Carolina-Columbia, and Clemson University. Top out-of-state colleges were Western Carolina University (27 enrollees) and University of North Carolina at Chapel Hill (16 enrollees). The freshman course pass rate of these students attending an in-state school was approximately 93%.[13]

Table 8.3 2018-2019 High School Completers Top College Enrollments (York School District 1, 2 and 4)

University or College	Enrollees
York Technical College	350
University of South Carolina-Columbia	287
Clemson University	193
College of Charleston	100
Winthrop University	96
Coastal Carolina University	93
Anderson University	31
University of South Carolina Upstate	31
Wofford College	31
Western Carolina University	27
Midlands Technical College	22
Lander University	21
University of South Carolina-Lancaster	21
University of North Carolina at Chapel Hill	16
Tri-County Technical College	13
Duke University	12
University of Georgia	12

Source: York County School Districts 1, 2 and 4

For-profit businesses and entrepreneurs/startups were surveyed to identify their top recruiting colleges. The results are summarized in Table 8.4. In comparing the businesses top college choices for recruiting with high school senior college choices, there is some alignment with a student's top three choices. However, Winthrop University is a top choice for York businesses, but ranked fifth in student college choices.

Table 8.4 York County Businesses Top Recruiting Colleges

College	Survey Results
Winthrop University	20%
Clemson University	19%
York Technical College	17%
USC-Columbia	17%
University of North Carolina at Charlotte	12%
Central Piedmont Community College	7%
University of South Carolina-Lancaster	7%

Source: Garner Economics York County Survey, December 2020

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[13] Pass rate is based only on students completing freshman courses and does not include those that may have dropped the course.

Career and Technical Education

South Carolina offers Career and Technical Education (CTE) programs based on the 16 nationally recognized career clusters.[14] In school year 2018-2019, there were 9,695 high school students (70.4% of total students) enrolled in CTE programs across the seven high schools with a total of 2,051 national or state CTE credentials earned.[15] Those schools rated as Good has the lowest percent of CTE enrolled at 65% and comprised only 21% of the total CTE National or State credentials earned. Health Science programs consistently had the highest number of credentials earned across all schools. The next highest number of credentials earned was in Transportation, Distribution and Logistics programs. A total of 2,110 high school completers from all schools (71%) earned a Silver, Gold or Platinum on the WIN Ready to Work Certificate.

Table 8.5 CareerReadiness Information for York County High Schools

High School	Enrollment	CTE Enrollment	CTE Top Programs Based on Industry Credentials Earned	CTE State or National Credentials Earned*	2019 Diploma Completers Earning Silver or Above on Career Readiness Assessment**	2019 Diploma Completers Engaged in State Approved WBL
Fort Mill High School	2,360	1,787	Finance; Health Science; Other	538	438	12
Nation Ford High School	2,194	1,517	Finance; Health Science; Transportation, Distribution & Logistics	351	377	13
Clover High School	2,376	1,757	Transportation, Distribution & Logistics; Health Science; Finance	495	379	6
York Comprehensive High School	1,509	1,121	Health Sciences; Hospitality & Tourism; Agriculture, Food and Natural Resources	235	179	65
Northwestern High School	1,865	1,314	Business Management & Admin; Transportation, Distribution & Logistics, Health Sciences	240	269	3
South Pointe High School	1,465	913	Health Sciences; Transportation, Distribution & Logistics, Other	62	187	1
Rock Hill High School	1,994	1,286	Health Sciences; Other; Transportation, Distribution & Logistics	130	281	3

*Students may earn more than one CTE credential
**SC administers the WIN Ready to Work that measures cognitive work readiness skills as its career readiness assessment
Source: South Carolina School Report Cards, SC Department of Education 2018–19

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[14] Information on the National Career Cluster Framework can be found at https://careertech.org/career-clusters-1.
[15] Students may earn more than one CTE credential.

Applied Technology Centers

There are three Applied Technology Centers (ATCs) that deliver CTE programs to five of the seven public high schools. They are the Applied Technology Center, the Cover Applied Technology Center, and the Floyd D. Johnson Technology Center. Fort Mill High School and Nation Ford High School deliver their own CTE programs. For these five schools associated with an ATC, there was a total CTE enrollment across all grades of 6,391 for 2018-19, of which 55% were enrolled in one of the top CTE programs identified in Table 8.6. The Health Sciences program accounted for 1,002 CTE students in 2018-19 school year, and approximately 16% of all CTE students enrolled at one of the three ATCs.

Table 8.6 Applied Technology Center Top CTE Courses by Enrollment

Technical Center	Associated High Schools	Top CTE Programs by Enrollment	Enrollment 2018-19	Enrollment 2019-20
Applied Technology Center	Northwestern High School Rock Hill High School South Pointe High School	Health Sciences	584	609
		Arts, Audio-Video Technology and Communications	526	487
		Construction Engineering	144	154
		Culinary Arts	188	120
		Education	148	107
Clover Technical Center	Clover High School	Finance (Business)	687	698
		Health Sciences	267	267
		Agriculture, Food and Natural Resources	210	223
Floyd D. Johnson Applied Technology Center	York Comprehensive High School	Finance (Business)	369	384
		Human Services/Family and Consumer Sciences	251	266
		Health Sciences	151	192

Source: Applied Technology Centers provided program enrollment data

Work-Based Learning (WBL)

Only 103 of the 2,973 high school completers (3.5%) from all high schools completed a state-approved work-based learning program with York Comprehensive High School having the largest number of graduating students (65) completing an experience. For SC report card reporting purposes, work-based learning efforts consist of a minimum of 40 practical experience hours or 120 hours for a work-based learning credit-bearing course.[16] However, schools can and do offer Extended Learning Opportunities (ELO) to students that include industry speakers, career days and fairs, career guidance workshops, job shadowing, and other similar experiences. Schools engage local industry in providing these work-based learning experiences. Fort Mill and Nations Ford High Schools have about 80 unique employers providing work-based learning experiences, mostly ELO, associated with the CTE programs available to these students. Rock Hill School District has approximately 60 unique employers and are providing similar work-based learning experiences, mostly ELO as well.[17]

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[16] The practical experience may be either a registered apprenticeship, youth apprenticeship, operative education (co-op), or internship codified by an agreement between the employer and students that outlines skills to be learned and require employer evaluations. The credit-bearing course is an internship approach available through a CTE program in the student's senior year.

[17] Data provided by Fort Mill and Rock Hill District WBL coordinators.

A summary of the types of work-based learning experiences taking place is provided in Table 8.7 for York County School Districts 3 and 4. In reviewing the data provided, job shadowing is by far the WBL experience of choice. The School-Based Enterprise Program focuses on the development of a small business created, managed, and operated by students in a school setting.[18]

Table 8.7 Total Work-Based Learning Experiences (practical experience and ELO) for Graduating Seniors for Fall 2019 York School Districts 3 and 4

Type of WBL experience	Fort Mill High School	Nation Ford High School	Applied Technology Center Rock Hill School District (3 High Schools)
Total Students Engaged in WBL	67	39	433
Cooperative Education Experiences	1	0	38
Field Study			98
Internship Experiences	9	19	50
Job Shadowing Experiences	91	114	99
School-Based Enterprise			124
Service Learning*			24

Community service-related experiences
Source: Self-reported by individual schools

Rock Hill High School has implemented the national Jobs for America's Graduates (JAG)[19] program which focuses on serving youth who face significant challenges, to help them reach economic and academic success. Many of the activities in a school's JAG program closely align with work-based learning experiences such as classroom guest speakers, community service activities, and on-the-job training opportunities. In 2018-19, there were 40 students engaged in the program, of which seven graduating seniors completed the program. In 2019-20, 35 students engaged in the program and nine graduating seniors completed the program.

Dual Enrollment and Advanced Placement

There are two ways high school students can earn college credit as a part of their high school program: dual enrollment and AP courses. Students completing either or both contribute to the high schools' College and Career Readiness score. Table 8.8 summarizes the number of York County high school completers that have earned AP and dual enrollment credit. The schools ranked Excellent focus more on providing students with an AP experience, while the remaining schools focus on providing both.

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[18] Work-based Learning Implementation Guidelines, Office of Career and Technical Education, South Carolina Department of Education.
[19] More information on JAG may be found at JAG.

Table 8.8 Number of Diploma Completers Earning Dual Enrollment or Advanced Placement Credit, 2018-2019

High School	Diploma Completers Earning AP Credit (Score >3)	Diploma Completers Earning 6 hours Dual Enrollment Credit (Grade >C)	2018-2019 Unduplicated Dual Enrollment at York Technical College	2018-2019 Unduplicated Dual Enrollment at Winthrop University
Fort Mill High School	207	0	11	9
Nation Ford High School	191	0	10	6
Clover High School	96	112	59	
York Comprehensive High School	44	99	235	
Northwestern High School	74	86	15	1
South Pointe High School	23	24	19	
Rock Hill High School	47	75	21	1

Source: South Carolina School Report Cards, SC Department of Education 2018–19, York Technical College

Dual enrollment opportunities are offered at both York Technical College (YTC) and Winthrop University. YTC has dual enrollment students from all the public high schools, with the largest enrollment from York Comprehensive High School (235). Popular dual enrollment programs at YTC include: University and Engineering Transfer, Automotive Repair, Basic Welding Diesel Engine Performance, Early Childhood Development, Industrial Maintenance, Personal Trainer, Patient and Nursing Care Technician, and Utility Line Worker. YTC has been focusing dual enrollment efforts on high school students completing college credentials, and in 2020, they reported 58 high school students completing college credentials. At this time, there are no work-based learning experiences offered in conjunction with the YTC dual enrollment opportunities.

Postsecondary Institutions

Four-Year Institutions and Two-Year Transferrable Degrees

There are a total of three degree-granting institutions in York County with a combined total of 11,490 undergraduate students enrolled in the 2018-2019 school year. There are two public postsecondary institutions (Winthrop University and York Technical College) and one private, nonprofit (Clinton College). Undergraduate tuition costs for Winthrop University are about 24% higher than the in-state, four-year public college average ($12,719); however, Clinton College tuition and fees are 56% lower than the average undergraduate costs for South Carolina private four-year colleges ($22,882).[20] York Technical College's tuition and fees are 20% lower than the state technical college average of $6,284.[21] Preliminary data for the 2019-2020 school year shows an 18% decrease in enrollment across all colleges from 2018-19 with the largest decrease experienced by Clinton College (24%).

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[20] Information on South Carolina college tuition found at www.collegetuitioncompare.com and is sourced to IPEDS, NCES and the U.S. Department of Education.
[21] Information on South Carolina technical college average tuition may be found at https://www.communitycollegereview.com/tuition-stats/south-carolina and is sourced to IPEDS, NCES.

Table 8.9 York County Colleges and University Enrollment, Fees and Type

Institutions	2018-19 Unduplicated Student Head County	2019-20 Preliminary Student Head Count	2019-20 Undergraduate Tuition and Fees*	Type
Clinton College	249	190	$10,020	Four-year, private, not-for-profit, degree-granting institution offering associate (primarily) and bachelor's degrees
Winthrop University	5,422	4,764	$15,806	Four-year, public, degree-granting institution offering bachelor's degrees, graduate degrees, and less-than-one-year certificates
York Technical College	5,819	4,529	$5,005 (In District)	Two-year, public, degree-granting institution offering associate degrees, less-than-one-year certificates and one-but-less-than-two-year certificates

*In-state tuition and fees for public institutions
Source: Integrated Postsecondary Education Data System (IPEDS), National Center for Education Statistics (NCES)

Garner Economics reviewed the highest graduating programs in the 2018-19 school year. Clinton College had the smallest number of graduates in both associate and bachelor's degrees for a combined total of 21. The largest number of graduates in York County are from Winthrop University, 995 bachelor's degree graduates, followed by York Technical College with 666 associate degree graduates. A review of Winthrop University's website shows that it caters to adult learners offering an innovative bachelor of professional studies degree with concentrations in organization operations or health services to greater York County residents. It includes both credit for prior learning—including experiential learning—and a hybrid approach (a mix of on-campus and online) to learning. Most of the four-year graduates were business administration and management, general graduates (193). York Technical College graduated 233 two-year liberal arts and sciences, liberal studies majors. York Technical College had 44 registered nursing, 31 industrial mechanics and maintenance technology and 30 data processing and data processing technology/technicians graduates. Of the 666 total associate degree graduates, 12.6% (84) continued their education. The job placement rate for York Technical College for 2018-19 school year was 93%.[22]

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[22] Job placement by program information may be found on the York Technical College website under student outcomes at https://www.yorktech.edu/student-consumer-information/.

Table 8.10 Postsecondary Four-Year Institution Enrollment, Tuition, and Top Program Information

Top Undergraduate Programs by College	Associate Degree Graduates	Bachelor's Degree Graduates
CLINTON COLLEGE—ALL PROGRAMS	**13**	**8**
Top Program Graduates		
Business Administration and Management, General	8	7
Liberal Arts and Sciences/Liberal Studies	3	
Early Childhood Education and Teaching	2	
Religion/Religious Studies		1
WINTHROP UNIVERSITY—ALL PROGRAMS	**Not Offered**	**995**
Top Program Graduates		
Business Administration and Management, General		186
Education (All Majors)		140
Mass Communication/Media Studies		61
Psychology, General		68
Social Work		58
Biology/Biological Sciences, General		57
Kinesiology and Exercise Science		53
YORK TECHNICAL COLLEGE—ALL PROGRAMS	**666**	**Not offered**
Top Program Graduates		
Liberal Arts and Sciences, Liberal Studies	233	
Multi-/Interdisciplinary Studies, Other	71	
Registered Nursing/Registered Nurse	44	
Business Administration and Management, General	41	
Industrial Mechanics and Maintenance Technology	31	
Data Processing and Data Processing Technology/Technicians	30	
Criminal Justice/Safety Studies	27	

Source: Integrated Postsecondary Education Data System, National Center for Education Statistics

SHORT-TERM TALENT PIPELINE DEVELOPMENT

The short-term talent pipeline development analysis looks at how the region is training individuals through shortened education and training programs. Included in this summary are York Technical College certificate and diploma programs, Winthrop University's continuing education and workforce training programs, high school apprenticeship programs administered through Apprenticeship Carolina, vocational rehabilitation training programs, adult education, and other training. Most of the data used in this section are not publicly or readily available. However, the data that were obtained provide a unique insight into how many adults in the community are being trained through short-term programs. The summary also includes funding received from the U.S. Department of Labor to SC Works Catawba, for the training of eligible individuals in the region.

Two-Year Postsecondary Institution—Certificates and Diploma

York Technical College is the only degree-granting institution that awards certificates and diplomas for programs usually ranging from six months to less than two years. It awarded 491 certificates and 93 diplomas in 2018-19 school year. The largest number of certificates earned is in liberal arts and sciences, liberal studies (165), which is the same top program as associate degrees awarded. This is followed by industrial electronics technology/technician and welding technology/welder majors.

Table 8.11 York Technical College Certificates and Diplomas Awarded 2018-19

Top Undergraduate Programs by College	≤1-Year Certificate	1- to ≤ 2-Year Certificate (Diploma)
YORK TECHNICAL COLLEGE—ALL PROGRAMS	**491**	**93**
Top Program Graduates		
Liberal Arts and Sciences, Liberal Studies	165	
Industrial Electronics Technology/Technician	60	2
Welding Technology/Welder	57	
Health Professions and Related Clinical Sciences, Other	23	
Licensed Practical/Vocational Nurse Training		22
Surgical Technology/Technologist	2	18
Data Processing and Data Processing Technology/Technician	15	

Source: Integrated Postsecondary Education Data System, National Center for Education Statistics

Continuing Education and Workforce Training

Continuing education and workforce training programs are a core component of short-term training offering professional development and skills upgrading to individuals seeking to further their current skills or learn new. They offer courses to the public and conduct employer-contracted training. While there are often a significant number of continuing education course offerings available to the public, they only run if minimum enrollment is met. While a valuable contributor to the short-term talent pipeline development, data is not usually reported and thus makes it challenging to understand the type of professional development or technical training services these providers are delivering to the region.

Two institutions in York County offer these types of continuing education and training opportunities. They are York Technical College, through its Workforce and Economic Development Department, and Winthrop University through its College of Business Administration. Winthrop University has offered one continuing education class

for nonprofit leaders since 2006, Nonprofit Management Certificate Program, with 31 completers in 2018-19 and 35 completers in 2019-20. York Technical College has a significant number of noncredit program completers. The South Carolina legislature sometimes provides funds for workforce development scholarships that can be used by residents to take continuing education courses. When these scholarships are available, enrollment is positively impacted.

Table 8.12 Continuing Education Program Enrollment at York Technical College, Workforce and Economic Development

Year	Continuing Education Course	Completers
2018-2019	Business and Professional Development and Information Technology	1,546
	Health Care	1,261
	Industrial Trades	694
	TOTAL COMPLETERS	**3,511**
2019-2020	Business and Professional Development and Information Technology	633
	Health Care	692
	Industrial Trades	432
	TOTAL COMPLETERS*	**1,757**

*Enrollment lower due to COVID-19 Pandemic

The Workforce and Economic Development Department (WED) at York Technical College also provides contracted training to companies in York County. Prior to the pandemic, WED provided training to 27 companies with an additional 20 companies serviced through their open enrollment continuing education programs. This has resulted in 855 employed individuals completing contract training and is included in the overall continuing education completer numbers reported in table 8.12.

York Technical College continues to maintain its Chester County Training Facility that offers the Utility Line Worker program along with Programmable Logic Controllers (PLC) courses for both credit and noncredit programs. However, recently the college has closed the Okuma Training Institute due to the completion of the contract. Currently, this space is being repurposed. It has also paused its Heavy Equipment Operator Facility to strengthen its successful Utility Line Worker program. Another downsizing includes the closing of the Indian Land Center where all programs have been moved to other facilities.

Enterprise Tax Credit

Manufacturing companies located in South Carolina may have the opportunity to utilize the Job Retraining Tax Credit (E-Zone) program to be reimbursed for certain training and education provided to employees.[23] The reimbursement is in the form of a credit of $1,000 per employee credit against withholding taxes. York Technical College manages the process for qualifying companies to apply. Currently there are five ongoing training projects with manufacturing companies in York County that may qualify for this incentive.

readySC™ Training

readySC™, a division of the South Carolina Technical College System, promotes economic development in South Carolina by providing no-cost, customized recruiting and training solutions to qualifying companies bringing new

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[23] More information on the Enterprise Tax Credit may be found at www.yorktech.edu/training-partnerships.

jobs to the state through relocation or expansion.[24] They provided training to several startup or expanding companies in York County from 2018 to 2020, as listed below. readySC offers a variety of customized training opportunities for companies, and those listed in Table 8.13 are a subset of the opportunities available to industry. readySC is known for its award-winning training services and economic development contributions.[25]

Table 8.13 readySC Training Provided for York County New or Expanding Companies

Year	Type of Training	Employees Trained*	Industry Sector
2018	Train-the-Trainer, OSHA10, company-specific workstation startup training, First Aid/CPR	44	Manufacturing companies: aerospace components, chemicals, and silicone production
2019	Train-the-Trainer, OSHA10, company-specific workstation startup training, First Aid/CPR, Lock-Out, Tag-Out safety awareness	54	Manufacturing companies: electrical components, chemicals, and silicone production
2020	Train-the-Trainer, OSHA10, company-specific workstation startup training, First Aid/CPR, Culture at Work, Leadership, Principles of Lean Manufacturing, Forklift	82	Manufacturing company: electrical components

*May include duplicated head count as employees may have taken more than one training program
Source: readySC

High School Apprenticeship Programs

Apprenticeship Carolina is a state-level organization in South Carolina that oversees apprenticeship training. It serves to coordinate training between education institutions and employers, including high schools. Garner Economics only evaluated the high-school level apprenticeship programs in York County, which show low participation in the region. However, Apprenticeship Carolina is looking to expand apprenticeship opportunities through new grants they received in 2020.[26]

Table 8.14 Apprenticeship Participation, York County High Schools, 2018–2019*

Company Name	Sponsor Occupation Title	Apprentices
Bernard N. Ackerman, CPA, P.A.	Accounting Technician	2
Field of Dreams Nurture and Education Center	Child Care Dev Specialist	1
The Goddard School for Early Childhood Development	Child Care Dev Specialist	1
MilesAway Inc.	Child Care Dev Specialist	1

*Preliminary data
Source: Youth Apprenticeship Programs, Apprenticeship Carolina

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[24] More information on readySC may be found at https://www.readysc.org.
[25]Information on readySC rankings and stats may be found at www.readysc.org/rankings-and-stats.html.
[26] State Apprenticeship Expansion 2020 Grant (July 1, 2020–June 30, 2023) and SC Youth Apprenticeship Readiness Initiative Grant (July 1, 2020–June 30, 2024). Both provide up to $2,500 per Apprentice for job-related expenses.

Public Workforce System Organizations

There is one public local workforce organization that serves York County—SC Works Catawba.[27] This organization also serves Chester and Lancaster Counties. Training funding for the public workforce systems is provided by the USDOL, mostly through the Workforce Innovation and Opportunity Act (WIOA) annual allocations and administered by the South Carolina Department of Employment and Workforce through SC Works.[28] Aside from WIOA funding, the public workforce organization receives Wagner-Peyser and Trade Adjustment Act (TAA) funding to provide employment services to its clients. SC Works Catawba is overseen by a local workforce board that is comprised of workforce partner organizations and private industry that oversees a budget of about $2.8 million.[29] The board has contracted with Equus Workforce Solutions (formerly ResCare Workforce Services) to manage daily operations. It provides in-person and online case management, training, and support services to adults, dislocated workers, and out-of-school youth. Equus also provides coordination with other WIOA mandates partner staff to ensure seamless delivery of services under a unified brand, SC Works. Information on the total number of people served in person over the last two years and WIOA allocations may be found below.

Table 8.16 York County Residents Served by SC Works Catawba

Type of Services*	July 1, 2018 to June 30, 2019	July 1, 2019 to June 30, 2020
In-person	13,277	7,811
Online	571,295	954,934

*Includes service provided through WIOA, Trade Adjustment Assistance, and Wagner-Peyser funds
Source: SC Works Catawba

Table 8.17 Program Year 2020 WIOA Funding Allocations for SC Works Catawba Workforce Organization

SC Works Local Organization	Counties Served	Adult	Dislocated Workers	Youth	Total
SC Works Catawba	Chester, Lancaster, and York	$594,508	$618,070	$598,242	$1,810,820

Source: SC Department of Employment and Workforce

Most of the funding is used for training purposes for workers displaced from a job, low-income adults, and at-risk or out-of-school youth. For the latter, the U.S. Department of Labor emphasizes youth funds being used for out-of-school youth, defined as students ages 16 to 24 and either a high school dropout or a high school graduate who is low-income or meets other eligibility requirements.

Training is provided for most adults through individual training accounts (ITA) that supplement other funds available for training. Most ITAs have a set limit allocation of $5,000–6,000 per person. Each state is required to develop an approved list of training providers, known as the Eligible Service Provider List (ESPL). For SC Works Catawba, there are 22 training providers on the ESPL that include York Technical College;[30] however, only four have provided training for York County residents over the past two years. A total of 132 individuals (adults and

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[27] More information on SC Works Catawba may be found at www.scworkscatawba.com.
[28] More information on SC Works may be found at www.scworks.org.
[29] Information on SC Works Catawba board may be found at www.scworkscatawba.com/wib.asp.
[30] Eligible service provider list for SC Works Catawba may be found at https://scpath.org/Search.

dislocated workers) received training over a two-year period with 61% taking Truck Driving CDL or Class A courses. A total of 104 of these program completers found employment.

Table 8.18 WIOA Funded Training for York County Adults and Dislocated Workers

Training Program	Training Provider	Individuals Trained	Completers Finding Employment
PY2018 (July 1, 2018 through June 30, 2019)			
Truck Driving CDL	Truck Driving Institute	36	32
Class A Truck Driving	Carolina Construction School	10	9
Microsoft Office Specialist	York Technical College	14	12
Non-Destructive Testing	NDE Institute	8	8
Emergency Medical Technician	York Technical College	6	5
PY2019 (July 1, 2019 through June 30, 2020)			
Truck Driving CDL	Truck Driving Institute	35	29
Patient Care Technician	York Technical College	8	2
Microsoft Office Specialist	York Technical College	7	2
Heavy Equipment Operator	Carolina Construction School	4	3
Manufacturing Essentials	York Technical College	4	2

Source: SC Works Catawba

Out-of-school youth training serves those youth (ages 17 to 24) who demonstrate a barrier to obtaining employment, such as having low income, a basic skills deficiency, or being a high school dropout. Table 8.19 summarizes the training for York County out-of-school youth served by SC Works Catawba.

Table 8.19 WIOA Funded Training for Out-of-School Youth

Training Program	Training Provider	Out-of-School Youth Trained	Completers Finding Employment
PY2018 (July 1, 2018 through June 30, 2019)			
Class A Truck Driving	Carolina Construction School	8	7
Non-Destructive Testing	NDE Institute	4	4
PY2019 (July 1, 2019 through June 30, 2020)			
Truck Driving CDL	Truck Driving Institute	7	5
Patient Care Technician	York Technical College	2	1

During the time-period of July 1, 2018 through June 30, 2020, 497 individuals earned a WIN Ready to Work Certificate through SC Works Catawba.

Prisoner Re-entry Training

In March of 2020, SC Works Catawba received a two-year grant totaling $150,000 and is partnering with York Technical College to provide training in the trades and construction skills to prisoners via its Re-entry Navigator program. The technical college is providing an additional $40,000 in scholarships. Each participant completes soft skills training through the Job Endurance Training (JET) program that may include obtaining a GED. They also

prepare and take the WIN Ready to Work certification. To date, there are 16 active participants two of which have found full-time employment.[31]

Adult Education

Adult Education is funded through Title II of WIOA. In South Carolina, adult education is overseen by the South Carolina Department of Education. In York County, Adult Education is administered at the district level by two organizations: Tri-District Adult Education (Clover, York, and Fort Mill Districts) and Rock Hill.[32] Both offer a combination of in-person and online learning in the areas of high school equivalency diploma preparation, basic skills upgrade, and English as a Second Language (ESL). The primary feeder for student referrals is SC Works Catawba; however, Tri-District receives referrals from local high schools and other community organizations where Rock Hill receives referrals from York Technical College for student support and other community organizations. There was a total of 200 GED completers over a two-year time frame.

Table 8.20 Adult Education GED Completers and WIN Ready to Work Certificates

Adult Education Participants	Tri-District Adult Education		Rock Hill Adult Education	
School Years	**2018-19**	**2019-20**	**2018-19**	**2019-20**
Enrolled	211	200	320	325
Participants	157	154		
GED Completers	46	33	66	55
WIN Ready to Work Certificates	86	71	198	175

Source: Tri-District Adult Education and Rock Hill Adult Education

Both Tri-District and Rock Hill have partnerships with postsecondary institutions to seamlessly transition students into postsecondary opportunities. They also focus on workforce training and preparation to help participants find employment.

Vocational Rehabilitation

The South Carolina Vocational Rehabilitation Department provides services across the state at the county level. Its mission is to prepare and assist eligible South Carolinians with disabilities to achieve and maintain competitive employment. In the York County area, there is one facility that serves both York and Chester Counties. The program provides individualized classroom, mentoring, and on-the-job instruction. Popular occupational preparation includes training for jobs in the production, office administrative support, food preparation and transportation; and material handling industry sectors. The following major employers have provided work opportunities to completers of the Vocational Rehabilitation program: City of Rock Hill, PCI Group, Piedmont Medical Center, Rock Hill School District, and Winthrop University. They had a 100% job placement rate for program completers in 2018 and 2019. Information on program enrollment and completers may be found in Table 8.21.

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[31] Data provided by EQUUS Workforce Solutions, SC Works Catawba.

[32] More information on Tri-District Adult Education may be found at www.clover.k12.sc.us/domain/47; More information on Rock Hill Adult Education may be found at www.rock-hill.k12.sc.us/adulteducation.

Table 8.21 York County Vocational Rehabilitation Completers

Year	Program Name	Completers	Completers Finding Employment
2018	SC Vocational Rehabilitation Program—York/Chester Counties	180	180
2019	SC Vocational Rehabilitation Program—York/Chester Counties	154	154

Source: York County Rock Hill-Lancaster Office, SC Vocational Rehabilitation Department

Additional Information

The goals and objectives of York County Technical College, including its Workforce and Economic Development Department and those of SC Works Catawba, were compared as they are the primary entities responsible for training. These are summarized in Table 8.22 below. A cursory review shows that there is a common thread among these institutions in how they measure success in terms of students completing programs and finding employment.

Table 8.22 Goals and Success Measures

Institution	Goals	Metrics
SC Works Catawba	SC Works Catawba's goal is to serve as a one-stop shop for providing employment and training services to qualifying residents of Chester, Lancaster, and York counties in partnership with other organizations. Funding for these services is provided by the U.S. DOL through the state Department of Employment and Workforce guided by Federal legislation and funding allocations.	The USDOL has mandatory measures of success negotiated between the federal, state, and local organization that include the number of individuals trained that find and retain employment and wages earned and out-of-school youth skill improvement.
York Technical College	The major goal is to maximize student success through excellence in recruitment, retention, completion (graduation), and placement (through job or continuing their education).	There are also institutional level goals for recruitment, retention (70% fall to fall), graduation, and placement (90% within a year after graduation).
Workforce and Economic Development, York Technical College	The WED department has the same overall goals as the college. However, they have an additional goal of ensuring programs are aligned to the needs of employers in both credit and noncredit	It measures success on enrollment and job placement rate, which was 93% for 2018-19 school year (page 10).

Source: Individual institutions provided information

Appendix A: Focus Group & Interview Participants

FOCUS GROUP PARTICIPANTS

- Robert Alexander, Coroplast
- Greg Austin, Comporium
- Ned Austin, Crescent
- Kristy Austin, Tri-District Adult Education
- Dave Beaty, Elkem Silicone USA
- Carrie Bolin, Clover School District
- Susan Brackett, Fort Mill School District
- Jim Bradford, City of York/Western York County ED Alliance
- Susan Britt, City of Tega Cay
- Jason Broadwater, Revenflo
- David Broom, Town of Fort Mill
- David Buist, Fort Mill Economic Partners
- Lynda Burke, SC Department of Employment & Workforce
- Tyler Calloway, SCWorks/EQUUS Workforce Solutions
- Shannon Carrigan, York Comprehensive High School
- Scott Childers, ESP Associates
- Jay Coleman, The Keith Corporation
- Bill Cook, Rock Hill School District
- Andrew Cope, JM Cope Construction
- Chris Daly, Childress Klein
- Cyndi Dandridge, Anderson UnderBridge
- John Danis, Wheel Pros
- Dene Dawson, Myers & Chapman
- Kathy Dickson, Apprenticeship Carolina
- Makesha Dixon, SC Vocational Rehab
- Seth Duncan, City of York
- Billy Dunlap, York County CVB
- Kimberly Faust, Winthrop University
- Tom George, SBDC—Winthrop University
- Scott Harris, Choate Construction
- Allison Harvey, Town of Clover
- Dan Heath, Lincoln Harris
- Nick Herfurth, Keller
- Greg Holmes, Town of Clover
- Tom Howard, Domtar
- Mark Howie, York Electric Cooperative

- David Hudspeth, York County
- Rhonda Huskins, SC Mfg. Extension Partnership
- James Hutto, National Manufacturing & Fabrication
- Dawn Johnson, Dawn Johnson State Farm
- Pat Jones, Carowinds
- Frank Keel, Jobs Rock Hill
- Sandy Martin, Duke Energy
- Amy Massey, Kimley Horn
- Cole McKinney, Catawba Regional Council of Governments
- Kim Mood, Carolina Therapy Solutions for Kids
- Don Moss, Colliers
- Warren Norman, Warren Norman Company
- Rick Norwood, Rock Hill Economic Development Corp.
- Mark Nosacka, Piedmont Medical Center
- David O'Neal, City of Tega Cay
- Rick Oppedisano, Delta Bravo
- Dave Oxedine, Redline Chemical
- Sheila Quinn, Clover School District
- Darbie Rasmussen-Anderson, U.S. Foods
- Lisa Robbins, SC Department of Commerce
- Ron Roveri, Rock Hill Applied Technology Center
- PN Saksena, Winthrop University
- Ryan Sanderson, Knowledge Perk
- Martha Starnes, Clover School District
- Vance Stine, Sifford-Stine Insurance
- David Stringer, Insignia Group, LC
- Stan Stuart, New-Indy Containerboard
- Lucinda Sutton, readySC
- Skip Tuttle, Tuttle Company
- David Vehaun, City of Rock Hill
- David Warner, Technology Incubator @ Knowledge Park
- Julisa White, True Divine Xpressions
- Jennifer Wilford, City of Rock Hill
- Dave Williams, McCraney Properties
- Mandy Wolff, Rock Hill Applied Technology Center
- Sonia Young, York Technical College
- Rob Youngblood, YCRCofC

INTERVIEWS

York County Council Members (4)
- Christi Cox, Council Chairwoman
- Robert Winkler, Vice-Chairman
- Brandon Guffey, Councilmember
- Tom Audette, Councilmember

York County Economic Development Staff
- David Swenson
- Teresa Curtice
- Jason Flora
- Caroline Floyd
- Barbara Mayes

Appendix B: Industry Details

The industry listing below marks major categories in blue. Specialized industries have location quotients greater than 1.2 and are shaded.

NAICS	Industry	Employment 2020	5-Year Change	LQ	Average Annual Wages
11	Agriculture, Forestry, Fishing and Hunting	766	12	0.53	$29,321
111	Crop Production	433	-180	0.77	$27,582
112	Animal Production and Aquaculture	88	47	0.18	$30,288
113	Forestry and Logging	50	-23	0.95	$33,672
114	Fishing, Hunting and Trapping	14	5	0.45	$21,794
115	Support Activities for Agriculture and Forestry	181	162	0.60	$31,717
21	Mining, Quarrying, and Oil and Gas Extraction	56	23	0.13	$64,332
211	Oil and Gas Extraction	1	0	0.01	$16,604
212	Mining (except Oil and Gas)	39	21	0.31	$48,132
213	Support Activities for Mining	16	2	0.09	$57,544
22	Utilities	1,059	-327	1.89	$117,871
23	Construction	5,800	1,464	0.94	$52,671
236	Construction of Buildings	868	160	0.62	$60,240
237	Heavy and Civil Engineering Construction	655	212	0.76	$46,961
238	Specialty Trade Contractors	4,277	1,093	1.09	$52,005
31	Manufacturing	11,205	154	1.29	$62,507
311	Food Manufacturing	179	33	0.16	$31,466
312	Beverage and Tobacco Product Manufacturing	137	88	0.71	$30,952
313	Textile Mills	536	-33	7.85	$52,461
314	Textile Product Mills	135	-33	1.83	$45,216
315	Apparel Manufacturing	33	19	0.43	$30,219
316	Leather and Allied Product Manufacturing	14	9	0.72	$57,896
321	Wood Product Manufacturing	550	35	1.91	$70,599
322	Paper Manufacturing	703	-184	2.84	$81,941
323	Printing and Related Support Activities	630	103	2.21	$66,259
324	Petroleum and Coal Products Manufacturing	7	-1	0.09	$88,830
325	Chemical Manufacturing	1,261	148	2.14	$72,524
326	Plastics and Rubber Products Manufacturing	296	23	0.61	$53,040
327	Nonmetallic Mineral Product Manufacturing	339	137	1.20	$54,487
331	Primary Metal Manufacturing	31	-30	0.12	$45,432
332	Fabricated Metal Product Manufacturing	2,171	-138	2.19	$60,731
333	Machinery Manufacturing	837	-242	1.12	$55,233
334	Computer and Electronic Product Manufacturing	234	29	0.32	$45,903
335	Electrical Equipment, Appliance, and Component Manufacturing	752	-124	2.80	$55,335
336	Transportation Equipment Manufacturing	1,384	-61	1.20	$76,714
337	Furniture and Related Product Manufacturing	327	18	1.25	$60,509
339	Miscellaneous Manufacturing	647	356	1.46	$50,181
42	Wholesale Trade	4,158	230	1.03	$70,459
423	Merchant Wholesalers, Durable Goods	1,803	224	0.82	$79,201
424	Merchant Wholesalers, Nondurable Goods	1,724	-109	1.17	$58,837
425	Wholesale Electronic Markets and Agents and Brokers	631	115	1.74	$76,959

NAICS	Industry	Employment 2020	5-Year Change	LQ	Average Annual Wages
44	Retail Trade	12,681	1,281	1.17	$31,289
441	Motor Vehicle and Parts Dealers	1,642	135	1.20	$47,471
442	Furniture and Home Furnishings Stores	190	-82	0.63	$27,826
443	Electronics and Appliance Stores	124	-42	0.39	$33,753
444	Building Material and Garden Equipment and Supplies Dealers	1,427	481	1.54	$39,808
445	Food and Beverage Stores	2,300	355	1.07	$23,642
446	Health and Personal Care Stores	667	-199	0.93	$35,622
447	Gasoline Stations	627	68	0.98	$22,783
448	Clothing and Clothing Accessories Stores	1,093	743	1.47	$37,982
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	454	-129	1.32	$22,284
452	General Merchandise Stores	2,749	-548	1.32	$23,791
453	Miscellaneous Store Retailers	943	431	1.63	$30,171
454	Nonstore Retailers	466	67	0.74	$30,511
48	Transportation and Warehousing	4,554	1,412	0.91	$43,929
51	Information	2,078	360	0.99	$78,414
511	Publishing Industries (except Internet)	429	-237	0.79	$82,743
512	Motion Picture and Sound Recording Industries	255	160	0.95	$48,592
515	Broadcasting (except Internet)	41	-8	0.23	$41,396
517	Telecommunications	511	-20	1.04	$61,646
518	Data Processing, Hosting, and Related Services	676	434	2.58	$111,326
519	Other Information Services	167	31	0.48	$46,466
52	Finance and Insurance	4,645	326	1.07	$81,447
521	Monetary Authorities-Central Bank	6	6	0.40	$101,204
522	Credit Intermediation and Related Activities	3,336	18	1.80	$84,713
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	476	354	0.68	$103,253
524	Insurance Carriers and Related Activities	820	-59	0.46	$54,391
525	Funds, Trusts, and Other Financial Vehicles	7	7	0.59	$134,226
53	Real Estate and Rental and Leasing	1,883	519	1.02	$67,444
531	Real Estate	1,115	253	0.76	$47,349
532	Rental and Leasing Services	747	244	2.02	$147,216
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	21	20	1.37	$135,840
54	Professional, Scientific, and Technical Services	4,992	1,627	0.68	$63,069
5411	Legal Services	544	103	0.64	$68,588
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	352	-24	0.45	$38,210
5413	Architectural, Engineering, and Related Services	1,111	320	0.98	$67,940
5414	Specialized Design Services	98	24	0.67	$49,810
5415	Computer Systems Design and Related Services	506	160	0.32	$90,442
5416	Management, Scientific, and Technical Consulting Services	1,165	640	0.94	$67,799
5417	Scientific Research and Development Services	59	27	0.11	$94,207
5418	Advertising, Public Relations, and Related Services	411	208	1.19	$41,773
5419	Other Professional, Scientific, and Technical Services	746	170	1.01	$48,329

NAICS	Industry	Employment 2020	5-Year Change	LQ	Average Annual Wages
55	Management of Companies and Enterprises	4,744	4,649	2.93	$94,678
56	Administrative and Support and Waste Management and Remediation Services	6,388	-1,562	0.96	$36,510
561	Administrative and Support Services	6,241	-1,562	0.99	$36,478
562	Waste Management and Remediation Services	147	0	0.45	$37,729
61	Educational Services	9,147	789	1.05	$40,662
62	Health Care and Social Assistance	9,835	135	0.63	$45,067
621	Ambulatory Health Care Services	4,279	271	0.77	$59,928
622	Hospitals	1,694	-305	0.38	$61,268
623	Nursing and Residential Care Facilities	1,983	-140	0.83	$30,509
624	Social Assistance	1,879	309	0.62	$23,875
71	Arts, Entertainment, and Recreation	2,125	-43	1.17	$16,826
711	Performing Arts, Spectator Sports, and Related Industries	328	22	0.62	$17,342
712	Museums, Historical Sites, and Similar Institutions	216	0	1.43	$21,201
713	Amusement, Gambling, and Recreation Industries	1,581	-65	1.39	$13,855
72	Accommodation and Food Services	10,033	1,415	1.18	$16,758
721	Accommodation	822	167	0.69	$20,775
722	Food Services and Drinking Places	9,211	1,249	1.27	$16,411
81	Other Services (except Public Administration)	5,410	574	1.18	$29,276
811	Repair and Maintenance	1,604	262	1.56	$42,273
812	Personal and Laundry Services	1,389	161	0.98	$25,432
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	2,335	206	1.17	$23,243
814	Private Households	81	-56	0.48	$20,486
92	Public Administration	3,894	372	0.75	$44,449
921	Executive, Legislative, and Other General Government Support	2,708	290	1.30	$48,373
922	Justice, Public Order, and Safety Activities	159	31	0.12	$37,578
923	Administration of Human Resource Programs	549	5	0.97	$43,507
924	Administration of Environmental Quality Programs	170	19	0.73	$50,012
925	Administration of Housing Programs, Urban Planning, and Community Development	70	5	1.02	$42,706
926	Administration of Economic Programs	217	26	0.49	$37,737
928	National Security and International Affairs	20	-4	0.05	$50,674

Source: JobsEQ, Garner Economics, 4 Quarter Average

Appendix C: Occupational Details

The Occupation listing below marks major categories in blue. Specialized Occupations have location quotients greater than 1.2 and are shaded.

SOC	Occupation	Employment 2020	5-Year Change	LQ	Average Annual Wages
11-0000	Management Occupations	6,211	1,605	0.90	$115,800
11-1000	Top Executives	2,004	614	1.09	$130,200
11-2000	Advertising, Marketing, Promotions, Public Relations, and Sales Managers	481	203	0.87	$133,700
11-3000	Operations Specialties Managers	1,355	536	0.97	$127,400
11-9000	Other Management Occupations	2,371	252	0.76	$93,200
13-0000	Business and Financial Operations Occupations	5,022	1,549	0.85	$72,900
13-1000	Business Operations Specialists	2,946	1,081	0.76	$69,000
13-2000	Financial Specialists	2,075	469	1.02	$78,500
15-0000	Computer and Mathematical Occupations	2,458	894	0.76	$79,000
15-1200	Computer Occupations	2,380	855	0.77	$78,700
15-2000	Mathematical Science Occupations	78	40	0.57	$85,800
17-0000	Architecture and Engineering Occupations	2,124	273	1.16	$76,600
17-1000	Architects, Surveyors, and Cartographers	212	87	1.48	$71,900
17-2000	Engineers	1,383	111	1.14	$87,300
17-3000	Drafters, Engineering Technicians, and Mapping Technicians	529	75	1.11	$50,700
19-0000	Life, Physical, and Social Science Occupations	590	80	0.62	$66,400
19-1000	Life Scientists	69	7	0.31	$71,200
19-2000	Physical Scientists	116	20	0.64	$74,100
19-3000	Social Scientists and Related Workers	133	22	0.62	$77,600
19-4000	Life, Physical, and Social Science Technicians	167	-3	0.67	$52,200
19-5000	Occupational Health and Safety Specialists and Technicians	105	34	1.31	$63,500
21-0000	Community and Social Service Occupations	1,737	204	0.94	$45,000
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	1,137	138	0.74	$44,700
21-2000	Religious Workers	600	66	1.85	$45,500
23-0000	Legal Occupations	611	148	0.68	$99,500
23-1000	Lawyers, Judges, and Related Workers	380	81	0.64	$131,400
23-2000	Legal Support Workers	231	67	0.77	$46,900
25-0000	Educational Instruction and Library Occupations	6,442	538	1.08	$41,600
25-1000	Postsecondary Teachers	565	-114	0.61	$64,100
25-2000	Preschool, Elementary, Middle, Secondary, and Special Education Teachers	3,564	385	1.30	$45,700
25-3000	Other Teachers and Instructors	984	141	1.07	$29,700
25-4000	Librarians, Curators, and Archivists	173	12	1.00	$46,400
25-9000	Other Educational Instruction and Library Occupations	1,155	113	0.98	$27,600
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,708	317	0.91	$53,100
27-1000	Art and Design Workers	598	174	1.00	$51,900
27-2000	Entertainers and Performers, Sports and Related Workers	541	65	1.04	$52,900
27-3000	Media and Communication Workers	349	20	0.66	$60,600
27-4000	Media and Communication Equipment Workers	220	58	0.95	$44,800

SOC	Occupation	Employment 2020	5-Year Change	LQ	Average Annual Wages
29-0000	Healthcare Practitioners and Technical Occupations	4,121	87	0.67	$71,700
29-1000	Healthcare Diagnosing or Treating Practitioners	2,670	109	0.66	$88,900
29-2000	Health Technologists and Technicians	1,425	-24	0.71	$40,100
29-9000	Other Healthcare Practitioners and Technical Occupations	25	3	0.43	$43,300
31-0000	Healthcare Support Occupations	3,281	284	0.70	$27,000
31-1100	Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides	2,192	164	0.64	$22,200
31-2000	Occupational Therapy and Physical Therapist Assistants and Aides	87	-2	0.66	$48,300
31-9000	Other Healthcare Support Occupations	1,002	121	0.87	$35,600
33-0000	Protective Service Occupations	1,686	176	0.73	$39,400
33-1000	Supervisors of Protective Service Workers	171	21	0.81	$60,800
33-2000	Firefighting and Prevention Workers	263	25	1.20	$33,100
33-3000	Law Enforcement Workers	662	67	0.80	$48,000
33-9000	Other Protective Service Workers	589	63	0.56	$26,400
35-0000	Food Preparation and Serving Related Occupations	9,791	1,167	1.19	$22,400
35-1000	Supervisors of Food Preparation and Serving Workers	911	137	1.27	$34,500
35-2000	Cooks and Food Preparation Workers	2,481	296	1.19	$23,800
35-3000	Food and Beverage Serving Workers	5,546	627	1.22	$20,200
35-9000	Other Food Preparation and Serving Related Workers	853	107	1.00	$19,900
37-0000	Building and Grounds Cleaning and Maintenance Occupations	3,272	385	0.94	$26,200
37-1000	Supervisors of Building and Grounds Cleaning and Maintenance Workers	275	15	1.05	$43,900
37-2000	Building Cleaning and Pest Control Workers	2,152	260	0.91	$23,200
37-3000	Grounds Maintenance Workers	845	110	0.98	$28,100
39-0000	Personal Care and Service Occupations	3,014	190	1.08	$27,000
39-1000	Supervisors of Personal Care and Service Workers	240	38	1.04	$41,700
39-2000	Animal Care and Service Workers	232	77	1.06	$23,900
39-3000	Entertainment Attendants and Related Workers	444	-43	1.23	$20,100
39-4000	Funeral Service Workers	27	-11	0.60	$34,900
39-5000	Personal Appearance Workers	699	70	1.16	$28,800
39-6000	Baggage Porters, Bellhops, and Concierges	36	10	0.73	$23,600
39-7000	Tour and Travel Guides	39	1	1.05	$21,800
39-9000	Other Personal Care and Service Workers	1,298	48	1.05	$26,400
41-0000	Sales and Related Occupations	11,998	1,469	1.18	$40,100
41-1000	Supervisors of Sales Workers	1,586	130	1.28	$54,700
41-2000	Retail Sales Workers	7,030	797	1.25	$24,000
41-3000	Sales Representatives, Services	1,275	400	0.85	$66,300
41-4000	Sales Representatives, Wholesale and Manufacturing	1,383	130	1.20	$77,800
41-9000	Other Sales and Related Workers	724	12	1.10	$46,500
43-0000	Office and Administrative Support Occupations	14,068	1,627	1.04	$37,400
43-1000	Supervisors of Office and Administrative Support Workers	1,352	232	1.32	$54,600
43-2000	Communications Equipment Operators	56	-42	1.10	$27,600
43-3000	Financial Clerks	2,372	288	1.15	$36,100
43-4000	Information and Record Clerks	4,275	521	1.10	$34,100

SOC	Occupation	Employment 2020	5-Year Change	LQ	Average Annual Wages
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	1,577	177	1.05	$38,900
43-6000	Secretaries and Administrative Assistants	2,354	259	0.99	$38,600
43-9000	Other Office and Administrative Support Workers	2,082	192	0.80	$32,500
45-0000	Farming, Fishing, and Forestry Occupations	356	75	0.51	$28,800
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	23	4	0.67	$49,800
45-2000	Agricultural Workers	281	69	0.46	$25,700
45-3000	Fishing and Hunting Workers	9	3	0.59	n/a
45-4000	Forest, Conservation, and Logging Workers	43	-2	0.93	$37,900
47-0000	Construction and Extraction Occupations	4,568	937	0.93	$38,900
47-1000	Supervisors of Construction and Extraction Workers	483	129	1.06	$59,400
47-2000	Construction Trades Workers	3,598	726	0.94	$36,400
47-3000	Helpers, Construction Trades	181	7	1.11	$27,700
47-4000	Other Construction and Related Workers	245	62	0.80	$43,000
47-5000	Extraction Workers	61	13	0.37	$41,000
49-0000	Installation, Maintenance, and Repair Occupations	4,533	531	1.12	$45,500
49-1000	Supervisors of Installation, Maintenance, and Repair Workers	385	43	1.18	$66,700
49-2000	Electrical and Electronic Equipment Mechanics, Installers, and Repairers	427	52	1.08	$47,300
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1,202	120	1.01	$43,700
49-9000	Other Installation, Maintenance, and Repair Occupations	2,519	316	1.19	$42,800
51-0000	Production Occupations	8,057	-344	1.30	$37,800
51-1000	Supervisors of Production Workers	601	8	1.40	$61,000
51-2000	Assemblers and Fabricators	1,614	-138	1.31	$32,800
51-3000	Food Processing Workers	293	22	0.53	$27,800
51-4000	Metal Workers and Plastic Workers	1,799	-194	1.48	$40,700
51-5100	Printing Workers	294	27	1.77	$32,900
51-6000	Textile, Apparel, and Furnishings Workers	676	-26	1.76	$28,000
51-7000	Woodworkers	275	26	1.51	$31,200
51-8000	Plant and System Operators	259	-18	1.21	$58,600
51-9000	Other Production Occupations	2,247	-51	1.24	$36,300
53-0000	Transportation and Material Moving Occupations	9,805	1,217	1.11	$30,300
53-1000	Supervisors of Transportation and Material Moving Workers	380	87	1.19	$49,500
53-2000	Air Transportation Workers	26	9	0.14	$67,500
53-3000	Motor Vehicle Operators	2,684	426	0.86	$34,200
53-4000	Rail Transportation Workers	29	-9	0.48	$59,500
53-5000	Water Transportation Workers	8	1	0.15	$62,300
53-6000	Other Transportation Workers	143	30	0.60	$24,900
53-7000	Material Moving Workers	6,534	674	1.35	$27,400

Source: JobsEQ, Garner Economics, 4 Quarter Average
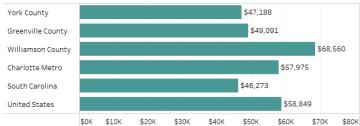
Appendix D: Assets & Challenges Endnotes

[a] **400-Mile Radius Results**

Geography Name	Year	Total Population
Radius Region	2019	68,667,771

Source: U.S. Census Bureau

[b] Ibid.

[c] Charlotte Douglas International Airport is 30 minutes away, and the Charlotte Regional Intermodal Facility is located at the CLT airport. Transportation - York County Economic Development (yorkcountyed.com).

[d] I-77 (N/S) runs through York County. I-85 access is nearby.

[e] York is served by CSX and Norfolk Southern.

[f] Charlotte Regional Intermodal Facility is located at the CLT airport. Transportation - York County Economic Development (yorkcountyed.com).

[g] CLT airport is less than 30 minutes away.

[h] Pilot Information | Rock Hill, SC (cityofrockhill.com).

[i] Please see page 35 of this document for detailed data.

[j] LQ (location quotient) of 1.32 or 8,283 employed in that sector. An LQ above 1.25 is considered good.

[k] LQ of 1.03 or 14,108 employed.

[l] LQ of 0.76 or 2,472 employed.

[m] LQ of 0.89 or 6,184 employed.

York County	$47,188
Greenville County	$49,091
Williamson County	$68,560
Charlotte Metro	$57,975
South Carolina	$46,273
United States	$58,849

[n] Wage data.

[o] York Technical College York Technical College :: Home.

[p] Winthrop University offers bachelor's- and master's-level degrees; Winthrop University, Rock Hill, SC 29733, USA Clinton College Home | Clinton College.

[q] Winthrop University, B.S. in computer science, Winthrop University: Majors and More - Computer Science.

[r] LQ of 1.31 with 11,560 employed.

[s] LQ of 0.65 with 4,769 employed.

[t] LQ of 2.80 with 4,626 employed.

[u] York County ranks 12th in the state of 46 counties producing an item in market value of agricultural products sold

[v] Industrial

Current Quarter	RBA	Vacancy	Market Rent Under	Availability Rate	Net Absorption	Deliveries SF
Logistics	24,111,649	13.1%	$5.51	14.2%	(162,131)	0	
Specialized	6,321,700	7.7%	$6.06	0.6%	(15,750)	0	0
Flex	1,942,419	0.7%	$12.83	1.2%	6,807	0	0
Submarket	**32,375,768**	**11.3%**	**$6.05**	**10.8%**	**(171,074)**	**0**	

^w Office

Current Quarter	RBA	Vacancy	Market Rent Under	Availability Rate	Net Absorption		Deliveries SF
4 & 5 Star	2,296,031	4.1%	$33.41	4.5%	(5,000)	8,000	10,000
3 Star	2,951,508	9.3%	$26.13	16.3%	11,522	0	29,190
1 & 2 Star	2,441,813	4.0%	$29.40	4.7%	2,189	0	0
Submarket	**7,689,352**	**6.1%**	**$29.34**	**9.1%**	**8,711**	**8,000**	**39,190**

*Rankings are based on the RBA, vacancy rates, and square footage under construction. In the case of office space, Garner Economics is more focused on 4- and 5-star space, based on the demands of York's industry targets.

^x SBA loans offered through area banks and the Council of Governments.

^y There is an angel Investor group in Rock Hill called VentureSouth Rock Hill. VentureSouth Rock Hill — VentureSouth.

^z Six FTEs encompassing the appropriate program functions.

^{aa} County-funded EDO with a supplemental public private partnership (PPP). However, there is debate from some in the public sector about accountability if the County EDO (YCED) is governed/led by the private sector.

^{bb} Multiple working strategic and business plans over the year, including an update currently being completed.

^{cc} Based on community engagement participation from both the public and private sectors

^{dd} Based on focus groups feedback

^{ee} Interpretation from Garner Economics based on stakeholder feedback.

^{ff} $900K+ operating budget combined from the County and the private sector.

^{gg} $68,600 budgeted for marketing purposes, not including external contributions to the CRP or the I-77 Alliance.

^{hh} There are four municipal systems in York County that ,depending on the location, offer excess water and wastewater capacity. Those four are Rock Hill, Fort Mill, Clover, and York County.

ⁱⁱ Based on stakeholder engagement feedback and our own observations.

^{jj} Incentives - York County Economic Development (yorkcountyed.com).

^{kk} ACT test scores compared to the benchmarks. See page 25 for more information.

^{ll} Based on stakeholder feedback.

^{mm} York County has one of the highest property tax rates by county in the state. Four other counties have a higher property tax. South Carolina Property Taxes By County - 2020 (tax-rates.org).

ⁿⁿ 455 homes for sale in York County with the minimum price range of $350,000 as of 12/1/20, according to Zillow.com; York County Real Estate - York County SC Homes For Sale | Zillow.

^{oo} 520 homes for sale in York County with the minimum price range of $150,000 to $349,999 as of 12/1/20, according to Zillow.com; Real Estate & Homes For Sale - 1,760 Homes For Sale | Zillow.

^{pp} 748 rentals available in York County as of 12/1/20, according to Apartments.com; York, SC Apartments for Rent.

^{qq} The cost of living in York County is relatively low compared to the national base of 100 and the overall Cost-of-Living Index compared to benchmark communities. Franklin (Williamson County) has a high cost of housing at 169 compared to a national average of 100. See page 29 for more information.

^{rr} See page 30 for more information.

^{ss} Arts & Culture - York County Economic Development (yorkcountyed.com); History & Culture of Rock Hill & Fort Mill | York County History - Rock Hill & Fort Mill Visitor's Bureau | York County SC Home (visityorkcounty.com).

^{tt} Park Info | York, SC (yorkcountygov.com); Sports and Recreation Fort Mill & Rock Hill | York County SC - Rock Hill & Fort Mill Visitor's Bureau | York County SC Home (visityorkcounty.com).

^{uu} Overall, the County and many of its municipalities show well.

^{vv} Local and Charlotte regional options; Healthcare - York County Economic Development (yorkcountyed.com).

^{ww} Find a Place to Stay in York County SC - Rock Hill & Fort Mill Visitor's Bureau | York County SC Home (visityorkcounty.com).

^{xx} Ft. Mill and Rock Hill, specifically.