

Garner | Economics LLC  
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## York County Future:

A Bold, High-Performing  
Economic Development Action Plan  
Designed to Achieve Success

April 2021

Prepared for:



YORK COUNTY

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## Executive Summary

In October 2020, York County, South Carolina, engaged Garner Economics, LLC to help create a multiyear, countywide economic development strategy that will guide economic development activities for the County. York County Economic Development (YCED) envisioned a plan that would build on previous work and propel the organization to influence high-quality job creation and talent recruitment to the area.

The focus of this engagement is for the County and its Economic Development Department (EDD) to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the County strengthens its competitive position.

The resulting plan, **YORK COUNTY FUTURE: A BOLD, HIGH-PERFORMING ECONOMIC DEVELOPMENT ACTION PLAN DESIGNED TO ACHIEVE SUCCESS**, details the asset development, marketing, and organizational changes the County and the economic development partners must make to strengthen York County as a competitive business location. This plan will help the County attract and retain businesses that will create jobs and opportunities and attract more talent to the area.

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 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 continue to make York County a desirable location for business and talent while sustaining and enhancing its character and quality of place.

### York County, South Carolina



FIGURE 1: PROJECT APPROACH & METHODOLOGY



## Analysis and Assessments

In February 2021, Garner Economics published a summary of the Phase 1 discovery process, called the **COMPETITIVE REALITIES REPORT**—a compilation of local and regional facts and data points. This discovery process informed the work to validate existing target business sectors and identify new target opportunities for York County and to formulate recommendations to enhance the County’s economic vitality and its ability to both attract and retain companies and talent. The assessments and key findings were presented to the EDD and are summarized in Chapter 1.



## Target Business Sectors

The optimal business sector targets presented in Chapter 2 provide the rationale for three core business sector targets and one target for improving York County's quality of place. Together, the targets will help the County grow and diversify its economic base, as well as mitigate identified challenges. These targets are best fits for York County based on the current economic and business climate conditions.

The targets are recommended given the County's attributes, assets, and proximity to other economic drivers (Figure 2). Each target group has a profile with valuable data and narrative to support the selections later in the report. While target marketing is primarily the work of economic development, the execution of the quality of place target would typically be led by organizations other than the YCED.

## Recommendations

In conducting this analysis, the Garner Economics team found that York County has some assets but also has several challenges that need to be overcome or mitigated to strengthen the County's competitiveness as a place for business. While the County has seen great success and is well poised to further set itself apart and provide value to the target business sectors, York County must continue to be proactive in building its product and talent pipeline.

Chapter 3 offers a set of implementable recommendations that will help the YCED better focus its efforts to attract high-quality companies and talent and position the County to leverage the next wave of economic growth. The recommendations also set a foundation the community can build upon to become an optimal business location choice within the Charlotte Metro.

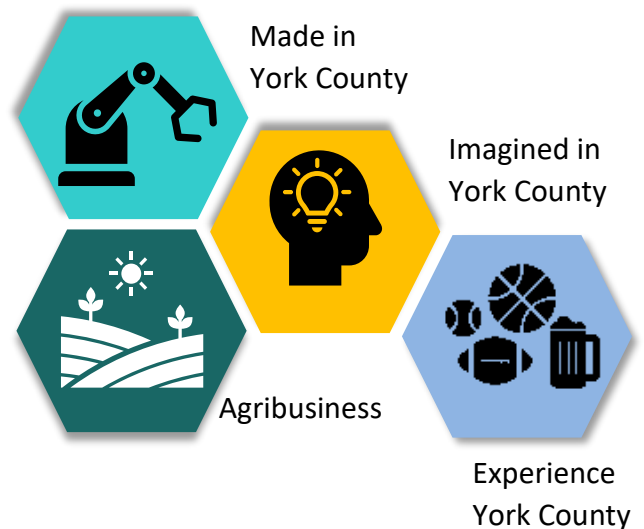
The recommendations reflect items that the YCED, York County, and other economic development partners should undertake to mitigate the current product challenges and better position York County to site-location advisors or companies in the identified target business sectors. The recommendations also include tactics the YCED can use to leverage strengths and effectively market York County to those targets.

The recommendations are broken into three categories:

- **Asset Development:** Asset development initiatives to ensure York County can compete to attract, retain, and grow the types of companies and talent the community desires;
- **Communicate the Brand:** Marketing approaches for the County to share the economic dynamism of the area with target prospects and talent; and
- **Execute Effectively:** Organizational adjustments that allow the YCED to work proactively in those areas that will directly impact the economic growth the community desires.

Additionally, the resulting recommendations identify areas where the YCED can act as a catalyst to lead initiatives to improve York County's quality of place and business climate. The tactics to market the County to prospective

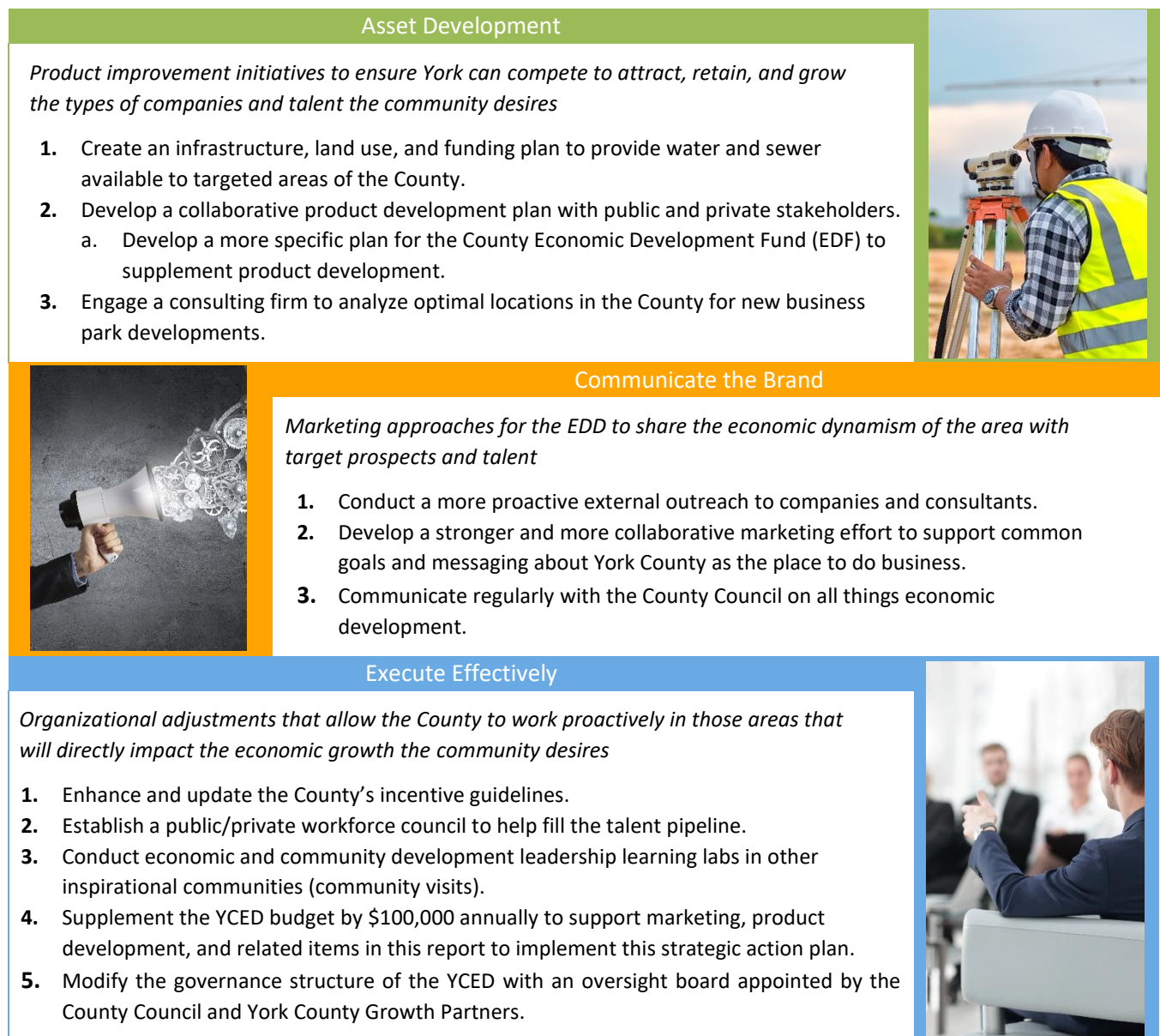
FIGURE 2: RECOMMENDED BUSINESS TARGETS



target businesses are primarily for the YCED. However, the messaging and brand refresh should be complementary to and supported by all economic development organizations working to improve York County.

The recommendations proposed in **YORK COUNTY FUTURE: A BOLD, HIGH-PERFORMING ECONOMIC DEVELOPMENT ACTION PLAN DESIGNED TO ACHIEVE SUCCESS** call on the YCED to enhance its economic development service delivery, reposition marketing efforts to target specific business clusters, and advocate for initiatives that will build upon and improve the County's available product and overall business climate. By highlighting its unique advantages and existing assets, the YCED can shape the County's economic future and encourage the business and talent growth the community desires.

FIGURE 3: RECOMMENDATION CATEGORIES



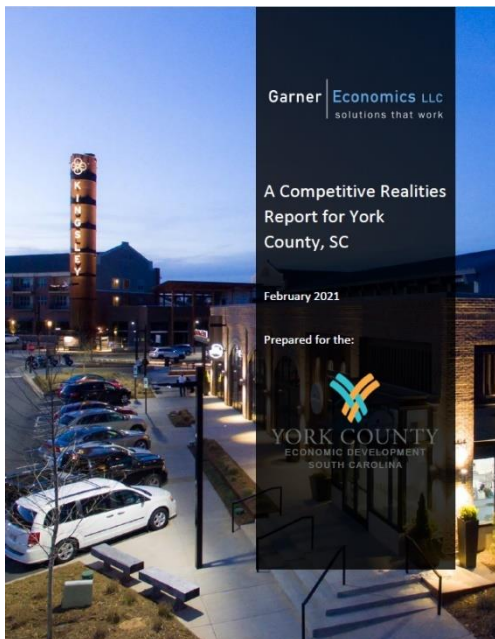


## Chapter 1: Where York County Stands as a Place for Business

### A SUMMARY OF THE COMPETITIVE REALITIES REPORT

This chapter summarizes the team's findings in the discovery phase. A more detailed discussion of the following information was presented to the YCED as a **COMPETITIVE REALITIES REPORT** in February 2021.

The **COMPETITIVE REALITIES REPORT** is an objective and subjective evaluation of where York County stands as a place for business. To build the report, the team collected data, conducted on-site visits, and solicited opinions and feedback from the area's stakeholders from a site-selection perspective. The team used the same criteria and measures that potential companies looking to invest or expand in York County would employ. Additionally, York County's economic position was compared against the benchmark counties of Greenville, South Carolina, and Williamson County, Tennessee (Nashville Metro area); the State of South Carolina; and the United States.



Four vehicles were used to create the **COMPETITIVE REALITIES REPORT**:

- Asset and Challenges Assessment;
- Stakeholder input (compiled through a series of focus groups, interviews with County Council members, and an electronic survey);
- Demographics and community analysis; and
- Assessment mapping of the workforce development delivery system.

In addition to informing the targeting and recommendations phases of the project, having a solid sense of where York County stands allows the YCED to recognize the area's strengths so they can be marketed and to identify gaps in the area's product, so they can take steps to mitigate those gaps and nurture a more attractive business climate.

## ASSETS AND CHALLENGES ASSESSMENT SUMMARY

Garner Economics undertook primary and web-based research to assess where the area stands. The team used a rigorous set of techniques based on fully sourced and reliable data sets to completely understand York County's current economic state. This assessment was undertaken from the perspective of businesses looking at York County as a possible location for operations and was grounded in decades of economic development, site-location analysis, and business sector targeting experience.

This **ASSETS AND CHALLENGES ASSESSMENT** compiled local facts and data points and applied quantitative analysis as well as some subjective opinions to build a scorecard for how York County rates. The analysis considered the same variables typically employed when undertaking a locational assessment for a corporate client. Garner Economics analyzed 51 community factors. Ratings were identified by evaluating the region's position for each of the factors against the state of South Carolina, the Charlotte Metro, and the United States, and, in many instances, the benchmarked communities (counties) of Williamson County, Tennessee, and Greenville County, South Carolina.

Of the 51 variables analyzed, 33 were considered an Asset and 5 a Challenge (13 rated as Neutral). An Asset rating indicates a positive feature of the County that would be evaluated and rated as a competitive strength versus the benchmark locations. Quality of place or a community's "charm factor" is one of the categories assessed and is a prime consideration for site selection because of its importance in attracting people and talent. Of the 11 quality of place factors measured for York County, all 11 are considered an Asset. ***This is the first time a community has rated a perfect Asset rating for quality of place*** in the more than 150 Asset and Challenges assessments Garner Economics has conducted.

### 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.




The following tables in Table 1.1 summarize the key findings of the **ASSETS AND CHALLENGES ASSESSMENT**, using the symbols and definitions above.

TABLE 1.1: YORK COUNTY'S ASSETS AND CHALLENGES

Detailed data and rationale for the ratings can be found in the **COMPETITIVE REALITIES REPORT**.

	 <b>Assets</b>	 <b>Challenges</b>	 <b>Neutral</b>
<b>Access to Markets</b>	<ul style="list-style-type: none"> <li>Centrally located for major regional market</li> <li>Centrally located for national market</li> <li>Well-positioned to serve international markets</li> <li>Interstate highways</li> <li>Rail service</li> <li>Within one hour of commercial air passenger service</li> <li>General aviation airport capable of handling corporate aircraft</li> </ul>	No Challenges noted	<ul style="list-style-type: none"> <li>Port facilities (inland and/or water)</li> <li>Broadband availability and speeds</li> </ul>
<b>Labor</b>	<ul style="list-style-type: none"> <li>Availability of skilled production workers</li> <li>Availability of skilled admin support workers</li> <li>Cost of labor</li> <li>Availability of postsecondary vocational training</li> <li>Within ½ hour of major university/college(s)</li> <li>Availability of engineering or computer science degree(s)</li> </ul>	<ul style="list-style-type: none"> <li>Limited number of computer and mathematical talent compared to the benchmarks</li> <li>Limited number of managerial personnel compared to the benchmarks</li> </ul>	No Neutral rankings noted
<b>Access to Resources</b>	<ul style="list-style-type: none"> <li>Availability of manufacturing processes</li> <li>Availability of management of companies and enterprises</li> <li>Agribusiness related economy</li> </ul>	<ul style="list-style-type: none"> <li>Limited number of professional, scientific, and technical services compared to the benchmarks</li> </ul>	No Neutral rankings noted
<b>Access to Space</b>	<ul style="list-style-type: none"> <li>Availability of fully served and attractive industrial sites and space (buildings)</li> </ul>	No Challenges noted	<ul style="list-style-type: none"> <li>Availability of suitable office space (Class A and B space)</li> </ul>
<b>Access to Capital</b>	<ul style="list-style-type: none"> <li>No Assets noted</li> </ul>	No Challenges noted	<ul style="list-style-type: none"> <li>Availability of tax-exempt financing for new industrial facilities</li> <li>Availability of low-interest loans for small business from local sources</li> <li>Availability of venture capital from local sources for business startups or early-stage funding</li> </ul>



	 <b>Assets</b>	 <b>Challenges</b>	 <b>Neutral</b>
<b>County Economic Development Program</b>	<ul style="list-style-type: none"> <li>• Adequate level of professional staff</li> <li>• Local economic development organization has a strategic plan</li> <li>• Level of leadership support of economic development program</li> <li>• Level of cooperation between organizations involved in economic development activity</li> </ul>	No Challenges noted	<ul style="list-style-type: none"> <li>• Involvement of both public and private sectors</li> <li>• Level of awareness of community regarding the economic development process</li> <li>• Level of funding for local economic development program (operating budget)</li> <li>• Organizational marketing/promotion budget</li> </ul>
<b>Government Impact on Business</b>	<ul style="list-style-type: none"> <li>• Availability/capacity of water and wastewater treatment (in select locations)</li> </ul>	<ul style="list-style-type: none"> <li>• Condition and maintenance of local streets</li> <li>• Local property taxes</li> </ul>	<ul style="list-style-type: none"> <li>• Availability and type of local incentives</li> <li>• Quality of local elementary and secondary education (test scores)</li> <li>• Business permitting procedures and costs</li> </ul>
<b>Quality of Place</b>	<ul style="list-style-type: none"> <li>• Availability of executive-level housing</li> <li>• Availability of moderate-cost housing</li> <li>• Availability of apartments</li> <li>• Cost-of-living index</li> <li>• Level of crime</li> <li>• Level of cultural activity</li> <li>• Availability of recreational opportunities</li> <li>• General appearance of the community</li> <li>• Availability of adequate medical facilities</li> <li>• Availability of quality hotels, motels, and resorts</li> <li>• Appearance of the Central Business District(s)</li> </ul>	No Challenges noted	No Neutral rankings noted

## WHAT STAKEHOLDERS THINK

### Focus Groups

As a complement to the assessment of the physical and regulatory structure in York County, Garner Economics conducted five focus groups with key community stakeholders; interviewed County Councilmembers; interviewed the YCED staff, and conducted an online survey to solicit a variety of perceptions of:

- The area's business climate;
- Stakeholders' thoughts on the area's attractiveness to companies;
- The types of companies that would be a good fit for the region; and
- Areas the community could or should work to improve.

Seventy-three people participated in the five groups. The focus groups were organized into the following categories: Large Employers, Small Businesses/Entrepreneurs, Economic Development Partners, Real Estate Brokers/Developers, and Workforce Development professionals. Participants were invited by the YCED. The focus groups were held on December 15 and 16, 2020; each group was asked the same set of questions. Special consideration was taken to adhere to COVID-19 protocols and safety measures.



### Councilmember Interviews

Garner Economics invited each of the county councilmembers to participate in a brief phone interview to solicit their thoughts. Garner Economics was able to interview four of the councilmembers. Given the councilmembers' 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.

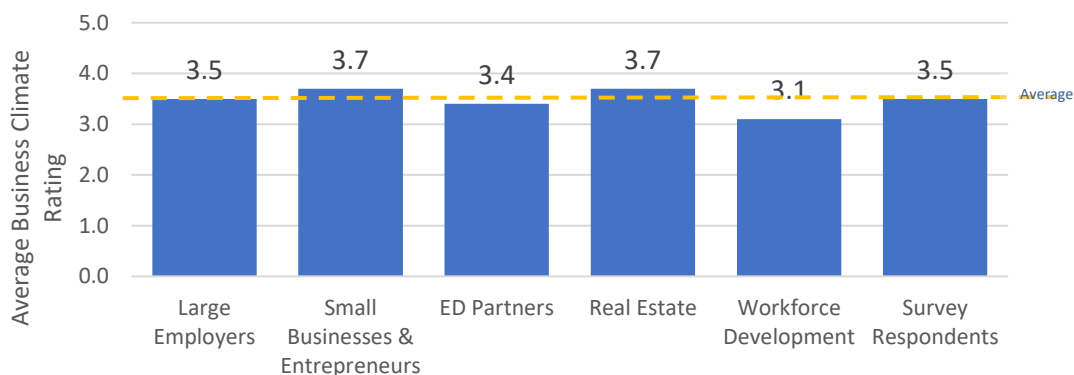
### Electronic Survey

Lastly, an electronic survey was built to mirror the questions asked during the focus groups. It was distributed by the YCED and shared to a broader audience. The survey was open November 30-December 23, 2020, and was completed by 135 people.

### Common Themes

As a group, the focus group participants and survey respondents believe that York County has a higher-than-average business climate. Overall, the five focus groups and the survey respondents rated York County's business climate as 3.5 (on a scale of 1-5 with "5" being "best" and "3" being "average").

**Figure 1.1 Focus Group Business Climate Rating, Scale of 1 (worst) to 5 (best)**



**3.5**

Overall Business  
Climate Rating

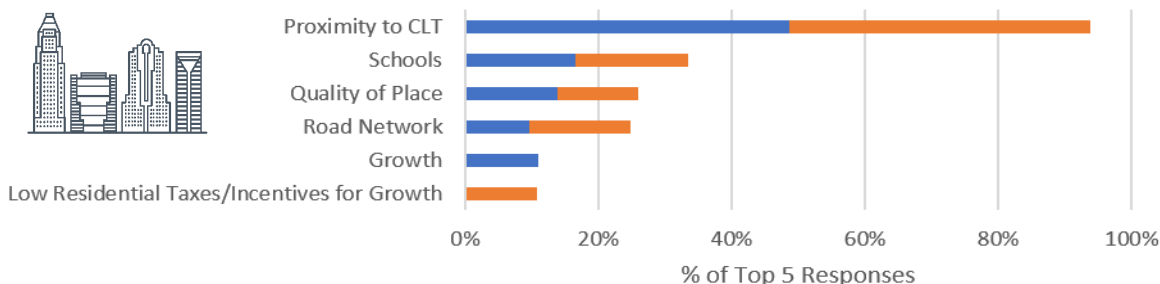
Furthermore, among the groups, there is general agreement as to the strengths and obstacles facing York County as it looks to attract and retain investment. The two stakeholder groups also have similar opinions as to missing or unsatisfactory infrastructure in the County.

**Figure 1.2: Comparison Among Focus Group and Survey Responses**

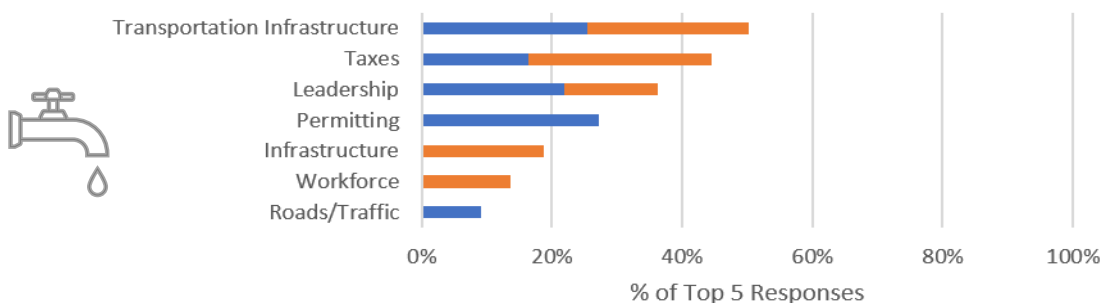
The following graphs illustrate the areas of commonality between the focus group participants and the survey respondents in regard to the top five responses given to the question below.

■ Focus Group Participants  
■ Survey Respondents

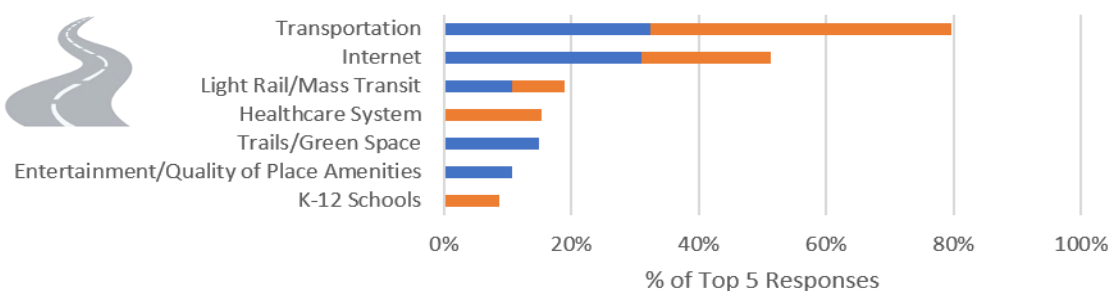
**What do you see as the County's strengths?**



**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?**



Further detail on the focus groups, councilmember interviews, and survey responses were shared in the [COMPETITIVE REALITIES REPORT](#).

## DEMOGRAPHIC & COMMUNITY TRENDS

As a complement to the asset benchmarking work above, the team examined data sets that reveal York County's economic position relative to the same benchmark counties, the state of South Carolina, and the national average.

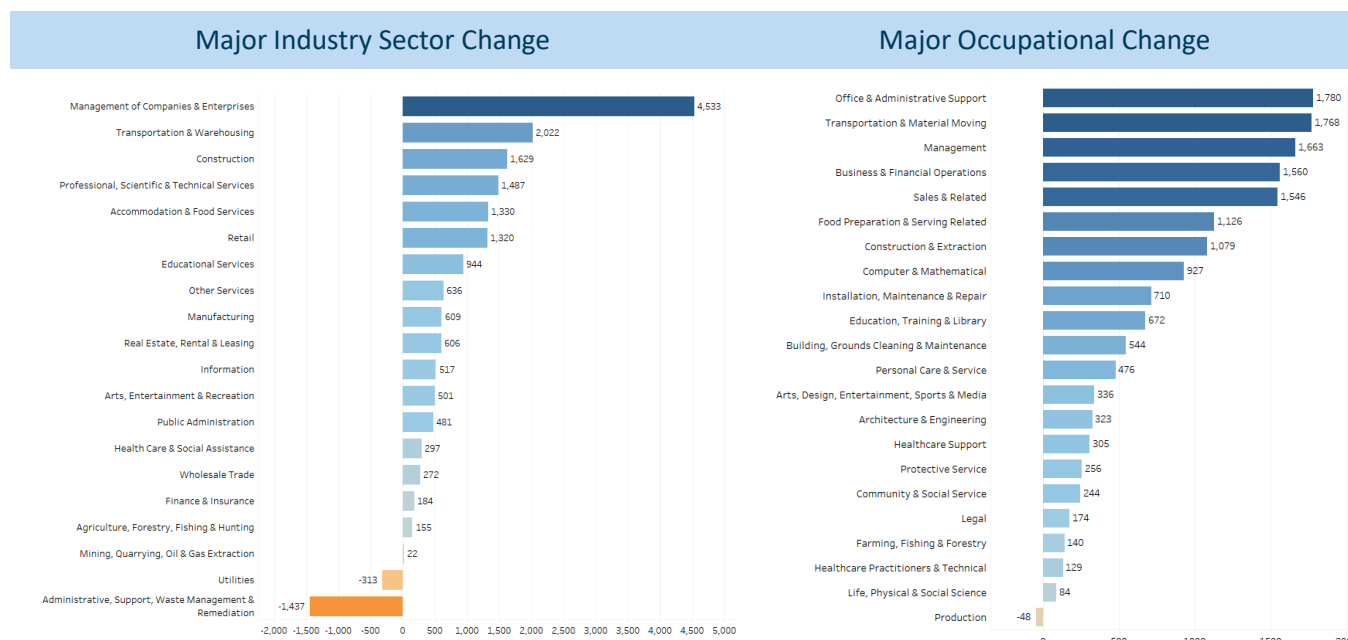
This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. Garner Economics used data that can be verified and, for which, comparisons with other cities or areas can be made at the level of detail preferred by most site-selection professionals. Metrics analyzed for the process were rated showing positive (↑), neutral (→), or negative indicators (↓). In all cases, the original and most current available data as of November 2020 are used.

The ratings presented in Figure 1.3 and industry and occupational analysis (Figure 1.4) are included in further detail in the **COMPETITIVE REALITIES REPORT**.

**Figure 1.3 Demographic and Community Trend Rankings (relative to competitive set)**



**Figure 1.4 Local Industry Growth**





## Chapter 2: Optimal Targets for York County

The optimal business sector selections are based on the specific characteristics of the economy and assets of York County, South Carolina. Garner Economics worked to validate existing targets and look for new opportunities. Overall, the recommended target families are designed to assist the County and its economic development efforts in prioritizing resources and focusing on sectors in which York County holds a competitive advantage, has growth potential, and/or improves the quality of place. This approach will help policymakers prioritize the County's community and economic development strategy. It is important to note that some activity—such as the strong distribution sector—is occurring organically and is not included or prioritized for marketing dollars.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins by considering the types of business sectors that stakeholders of York County would like to see in the community (Figure 2.1). Feasibility includes what the County can reasonably achieve short- to mid-term, based on current or planned locational assets and an analytical review of the economy.

Using results from the previously completed **COMPETITIVE REALITIES REPORT**, the **ASSETS AND CHALLENGES ASSESSMENT**, focus groups, a community survey, and field visits, three business families were chosen that best match York County's unique competitive advantages to the needs of particular business sectors. These targets are presented as collaborative, community targets led by York County Economic Development or other relevant organizations such as the Chamber of Commerce, the Convention & Visitors Bureau, etc. These targets are:

- Made in York County: Innovative Manufacturing
- Agribusiness: Agriculture, Food & Beverage Processing
- Imagined in York County: Knowledge Sector

In addition to these core business targets, a fourth target is presented to enhance the quality of place in York County and is titled **Experience York County**. The execution of this target would typically be led by organizations other than the YCED. This goal serves to cultivate retail and experiential activities to improve the visitor experience as well as invest in the quality of place and to support the strong sports marketing activity already happening in the County. This target has a direct linkage to talent attraction and retention and builds on both residents and visitors experiencing York County.

For each targeted business sector, the community's competitive advantages are presented along with national trends and projections of the targets. Target sectors may be stagnant or losing jobs nationally, but the particular set of economic development assets in York County position it to capture any growing demand to produce new jobs and improved gross domestic/regional product. For each target, a list of individual subsectors with accompanying NAICS classifications as well as a list of rationales that are identified as appealing to the needs of prospects (P) or the community (C) is presented. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.




It should be noted that this report was written at the height of the COVID-19 pandemic, which brought an added layer of complexity and opportunity. In selecting targets, the Garner Economics team also looked forward to predicted changes in the national economy due to supply chain shifts and reshoring.

**Figure 2.1: Optimal Target Screening Process**



- Made in York County
- Agribusiness
- Imagined in York County
- Experience York County

FIGURE 2.2 YORK COUNTY OPTIMAL TARGETS

 <b>Made in York County<sup>1</sup></b>	 <b>Imagined in York County<sup>2</sup></b>	 <b>Experience York County<sup>3</sup></b>
<i><b>Innovative Manufacturing</b></i>	<i><b>Knowledge Sector</b></i>	<i><b>Experiential &amp; Quality of Place</b></i>
<ul style="list-style-type: none"> <li>• Advanced materials (composites, coatings, inks)</li> <li>• Transportation equipment: automotive &amp; aerospace components</li> <li>• Pharmaceutical mfg.</li> <li>• Robotics</li> <li>• Medical supplies &amp; equipment</li> <li>• Metal fabrication &amp; metal products</li> <li>• Packaging</li> <li>• Industrial machinery mfg.</li> <li>• Sports equipment mfg.</li> </ul>	<ul style="list-style-type: none"> <li>• Headquarters &amp; business services</li> <li>• Automation &amp; production technology</li> <li>• IT &amp; computer systems design</li> <li>• Data processing, hosting</li> <li>• Data science &amp; analytics</li> <li>• Fintech/Insurtech</li> <li>• Internet publishing &amp; web portals</li> </ul>	<ul style="list-style-type: none"> <li>• Sports medicine</li> <li>• Craft breweries/small-batch distilleries</li> <li>• Local or unique/boutique retail</li> </ul> <p><i>Sports targets complement ongoing sports tourism efforts by others in York County.</i></p>



 <b>Agribusiness</b>
<i><b>Agriculture, Food &amp; Bev</b></i>
<ul style="list-style-type: none"> <li>• Food &amp; Beverage Processing</li> <li>• Cold Storage</li> <li>• Agritourism<sup>3</sup></li> <li>• Agriculture Suppliers</li> </ul>

*Distribution facilities will locate to York County organically without significant proactive marketing attention from the YCED.*

<sup>1</sup> Led by the YCED

<sup>2</sup> Led by the YCED

<sup>3</sup> Collaborative business sector led by the relevant York County entity (e.g., Chamber of Commerce, CVB, YCED)



## Made in York County

*Innovative Manufacturing*

Innovative manufacturing has made a home in York County, growing 20% of its employment base and increasing gross regional/domestic product (generally referred to as GDP) by 136% over the past decade. York County has a workforce that knows how to manufacture, with more than 11,200 employed within that sector in the County and up to 97,000 within a 45-minute commute.

The historical textile industry, which is still strong, has been joined by innovative operations within sectors such as automotive parts, tools, metalworking, and packaging. Next-generation companies such as 3D Systems Corporation and Shutterfly join global powerhouses such as Atlas Copco and Westinghouse.

Local specialization is strong in manufacturing with a 1.3 location quotient (LQ) for the overall industry. LQ shows the concentration of that industry in an area compared to the national level of concentration. An LQ of 1.2 or more is an indicator of strong local specialization. Manufacturing subsectors strengths include a high LQ of 9.6 in *Fabric Mills, Paper and Paperboard Mills* (LQ 7.6), *Chemical Products* (LQ 4.9), *Metal Fabrication* (LQ 4.8), and *Motor Vehicle Body Manufacturing* (LQ 4.4).

### **Automotive & Aviation**

The County's advantageous location near the automotive assembly facilities of BMW and Volvo in South Carolina gives credence to the subsector of *Motor Vehicle Parts Manufacturing*. York County is home to multiple facilities that create brakes, axles, engine components, and other parts.

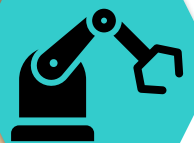
Continued attention to innovation and the attractive megasites located in the Southeast, the *Automotive* subsector is positioned to grow. Electric vehicles (EV) top the list of development and Arrival recently announced it will build its new \$46 million facility automotive Microfactory in York County, creating 240 jobs.

The Aviation industry is growing in the Southeast, the Carolinas, and the Charlotte Metro. The metro is home to aerospace firms such as Collins Aerospace Systems and the proximity to aircraft assembly facilities Boeing (Charleston) and HondaJet (Greensboro) offer opportunity for *Aerospace Parts Manufacturing*.

### **Target rationales include:**

- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Charlotte Douglas International Airport (P)(C)
- Availability of skilled workers in production and engineering
- Within ½ hour of major university/college (P)(C)
- York Tech Community College (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national 10-year job growth of 7.5% and GDP growth of 43% (P)(C)
- York County 10-year job growth of 20% and GDP growth of 136% (P)(C)
- York County 10-year forecast of 13.4% for job growth
- York County average wage for target occupations (\$22.27) is higher than living wage (\$20.63) (C)
- 7,776 degrees and certificates granted in majors related to target (P)
- Manufacturing industry LQ of 1.3 and higher for some subsectors

*Legend: Items appealing to needs of **prospects (P)** or **community (C)**.*



### ***Packaging***

Another specialty within this target family is *Packaging*. As e-commerce grows, the need for innovation and production of boxes, bags, labels, and packaging will be essential. York County has an existing strength in *Paper and Cardboard Manufacturing* along with *Printing Ink* (LQ 29.7). The number of printed goods may have decreased in modern times with the rise of digital materials; however, the consistent need for labeling consumer goods remains. The inclusion in a major market with a rapidly, organically growing distribution presence will need the suppliers of packaging materials and, in some cases, the actual repackaging or pairing of products.

### ***Advanced Materials***

The existing target of *Advanced Materials* is included in this target and is interwoven among several subcategories ranging from *Automotive* to *Sporting Goods*. This can be the actual creation of the material, or it can apply to the process of adding value or making new products from the materials. The making and using of advanced materials seeks to improve products and processes, making this sector an ongoing innovation and growth sector. Examples of advanced materials are carbon composite, plastics, coatings, and other chemical additives or products. The combination of manufacturing capacity and engineering technology in the area makes York County the ideal location for *Advanced Materials*.

### ***Sports***

York County is becoming known for sports. The Carolina Panthers transitioning their headquarters and building a sports complex along with the BMX Supercross track in Rock Hill help to push the County as an MVP in sports. The heavy emphasis in the County on sports marketing by multiple agencies presents an opportunity for supportive industries. Within this Made in York County target, the production of sports and athletic equipment was added. With the *Advanced Materials*, *Metalworking*, and other specialties within the County, this subsector was a natural fit.

### ***COVID-19 Pivots & Pharmaceuticals***

York County's strong position in the manufacturing sector positions the community for additional investment and job growth as the operations continue to reshore and improve supply chains. The COVID-19 pandemic in 2020 and 2021 has accelerated those trends and caused a new focus on industries such as *Pharmaceutical Manufacturing* along with *Personal Protective Equipment*.

*Pharmaceutical Manufacturing* is part of this recommended target family along with medical supplies and device manufacturing as a result of the increased need for this in the country. The notion of pharmaceuticals usually conjures up images of research and development activity. For this target, it is the manufacturing operations that are recommended and not the R&D. *Pharmaceutical Manufacturing* is akin to the *Food Processing* industry in many ways, including the skill sets and talent needed. Contract manufacturers make, in-bulk, medicines for a variety of clients.

Table 2.1 lists detailed NAICS codes for subsectors in this target family. Some of the official titles of NAICS codes do not match the general phrasing of the target subsectors listed on page 14 but are contained within that subsector. In the case of *Advanced Materials*, these are interwoven among several subsectors in the detailed table.



**Table 2.1 Made in York County Job & GDP Trend & Outlook, 2020**  
**Listed in Priority Rank<sup>4</sup>**

NAICS	Industry	United States			York County			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	LQ
335991	Carbon & Graphite Product Mfg.	57.9%	29.7%	5.9%	n/a	24557.2%	22.3%	3.2
3363	Motor Vehicle Parts Mfg.	255.5%	27.7%	2.6%	127.9%	-32.3%	18.9%	2.4
3252	Resin, Synthetic Rubber, Fibers & Filaments Mfg.	45.6%	3.5%	0.2%	420.3%	77.0%	16.6%	4.7
3327	Machine Shops; Turned Product; Screw, Nut, & Bolt Mfg.	45.5%	11.3%	3.2%	163.1%	31.9%	18.0%	1.5
56191	Packaging & Labeling Services	51.4%	15.3%	2.5%	27.7%	-61.0%	n/a	n/a
3254	Pharmaceutical Mfg.	30.5%	10.8%	5.6%	7848.3%	3423.5%	21.6%	0.2
335999	All Other Miscellaneous Electrical Equipment & Component Mfg.	58.2%	11.5%	5.6%	26976.1%	224.9%	22.3%	14.8
33911	Medical Equipment & Supplies Mfg.	27.5%	5.0%	0.9%	46.2%	37.5%	17.4%	1.4
3321	Forging & Stamping	40.7%	6.0%	-11.0%	266.1%	169.9%	5.3%	3.3
3364	Aerospace Product & Parts Mfg.	46.6%	9.2%	-0.4%	13956.2%	5682.7%	15.5%	0.2
3332	Industrial Machinery Mfg.	57.4%	18.1%	-1.5%	39.6%	1.8%	14.7%	1.7
3345	Navigational, Measuring, Electromedical, & Control Instruments Mfg.	27.9%	3.1%	1.9%	804.4%	11.4%	18.1%	0.7
3328	Coating, Engraving, Heat Treating, & Allied Activities	46.3%	9.4%	-3.5%	77.0%	18.2%	12.8%	2.3
33591	Battery Mfg.	92.8%	64.1%	6.0%	n/a	n/a	n/a	n/a
3339	Other General Purpose Machinery Mfg.	48.4%	18.2%	-1.5%	1.6%	-20.7%	14.6%	0.9
32591	Printing Ink Mfg.	-4.7%	-21.3%	-0.4%	26.9%	-18.2%	16.5%	29.7
3231	Printing & Related Support Activities	1.1%	-20.7%	-19.5%	451.8%	296.3%	-3.0%	2.2
3261	Plastics Product Mfg.	39.0%	14.5%	-8.0%	1.6%	-2.1%	7.8%	0.2
33992	Sporting and Athletic Goods Manufacturing	0.1%	-0.04%	-0.01%	1.5%	4.7%	0.1%	0.4
32599	All Other Chemical Product & Preparation Mfg.	14.4%	-4.1%	-0.3%	7.8%	-12.4%	16.1%	2.6
3222	Converted Paper Product Mfg.	0.9%	-6.5%	-7.6%	33.1%	-8.7%	8.7%	1.2
423830	Industrial Machinery & Equipment Merchant Wholesalers	68.7%	16.1%	-5.2%	18.9%	2.3%	11.0%	1.5
<b>Total Target</b>		<b>43.0%</b>	<b>7.5%</b>	<b>-2.5%</b>	<b>136.4%</b>	<b>19.9%</b>	<b>13.4%</b>	

Source: JobsEQ, Garner Economics

<sup>4</sup> Priority rank was calculated by ranking historic growth factors in GDP and employment, forecasted employment for the nation and York County along with York County specialization (LQ). Additional weight in score was given to high LQs.

**Table 2.2 Made in York County: Target Top Occupations, 2020**

SOC	Occupation	York County			Fort Mill Drive-Time	
		Employment (Place of Residence)	Employment (Place of Work)	LQ	Employment (Place of Residence)	Employment (Place of Residence)
53-7060	Laborers and Material Movers	6,461	5,673	1.3	51,406	29,667
43-4050	Customer Service Representatives	3,148	2,594	1.3	27,070	13,709
43-6010	Administrative Assistants	2,888	2,354	1.0	22,858	11,817
43-9060	Office Clerks, General	2,313	1,706	0.8	21,627	11,050
11-1020	General and Operations Managers	2,016	1,744	1.1	16,751	8,700
41-4010	Sales Representatives, Wholesale and Mfg.	1,777	1,383	1.2	15,397	7,969
51-2090	Miscellaneous Assemblers and Fabricators	1,481	1,281	1.4	10,627	8,209
49-9070	Maintenance and Repair Workers	1,373	1,226	1.3	10,442	6,100
15-1250	Software and Web Developers, Programmers, and Testers	1,225	733	0.6	14,860	6,857
43-5070	Shipping, Receiving, and Inventory Clerks	734	623	1.3	5,350	3,224
51-1010	First-Line Supervisors of Production and Operating Workers	700	601	1.4	4,747	3,270
51-9190	Miscellaneous Production Workers	684	660	1.3	4,952	3,525
51-9060	Inspectors, Testers, Sorters, Samplers, and Weighers	659	540	1.4	4,426	3,022
49-9040	Industrial Machinery Installation, Repair, and Maintenance Workers	609	555	1.6	3,734	2,856
51-4040	Machinists	524	510	2.0	2,820	2,232
13-1020	Buyers and Purchasing Agents	473	342	1.2	3,793	1,751
51-4120	Welding, Soldering, and Brazing Workers	447	438	1.4	2,931	2,161
17-2110	Industrial Engineers, Including Health and Safety	382	340	1.6	2,767	1,635
17-3020	Engineering Technologists and Technicians	343	245	1.0	1,888	1,027
43-5060	Production, Planning, and Expediting Clerks	332	284	1.1	2,396	1,214
51-5110	Printing Workers	313	294	1.8	1,532	1,138
17-2140	Mechanical Engineers	300	234	1.1	2,526	1,349
51-4030	Machine Tool Cutting Setters, Operators, and Tenders, Metal and Plastic	297	296	1.4	2,087	1,712
51-9110	Packaging and Filling Machine Operators and Tenders	243	186	0.7	2,554	1,607
51-2020	Electrical, Electronic, and Electromechanical Assemblers	239	224	1.1	1,471	1,095
11-3050	Industrial Production Managers	204	162	1.3	1,562	863
51-4070	Molders and Molding Machine Setters, Operators, and Tenders, Metal and Plastic	167	101	0.8	1,579	1,126
51-4020	Forming Machine Setters, Operators, and Tenders, Metal and Plastic	163	143	1.8	1,314	932
51-4080	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	155	165	1.7	871	783
51-9160	Computer Numerically Controlled Tool Operators and Programmers	138	129	1.1	784	650

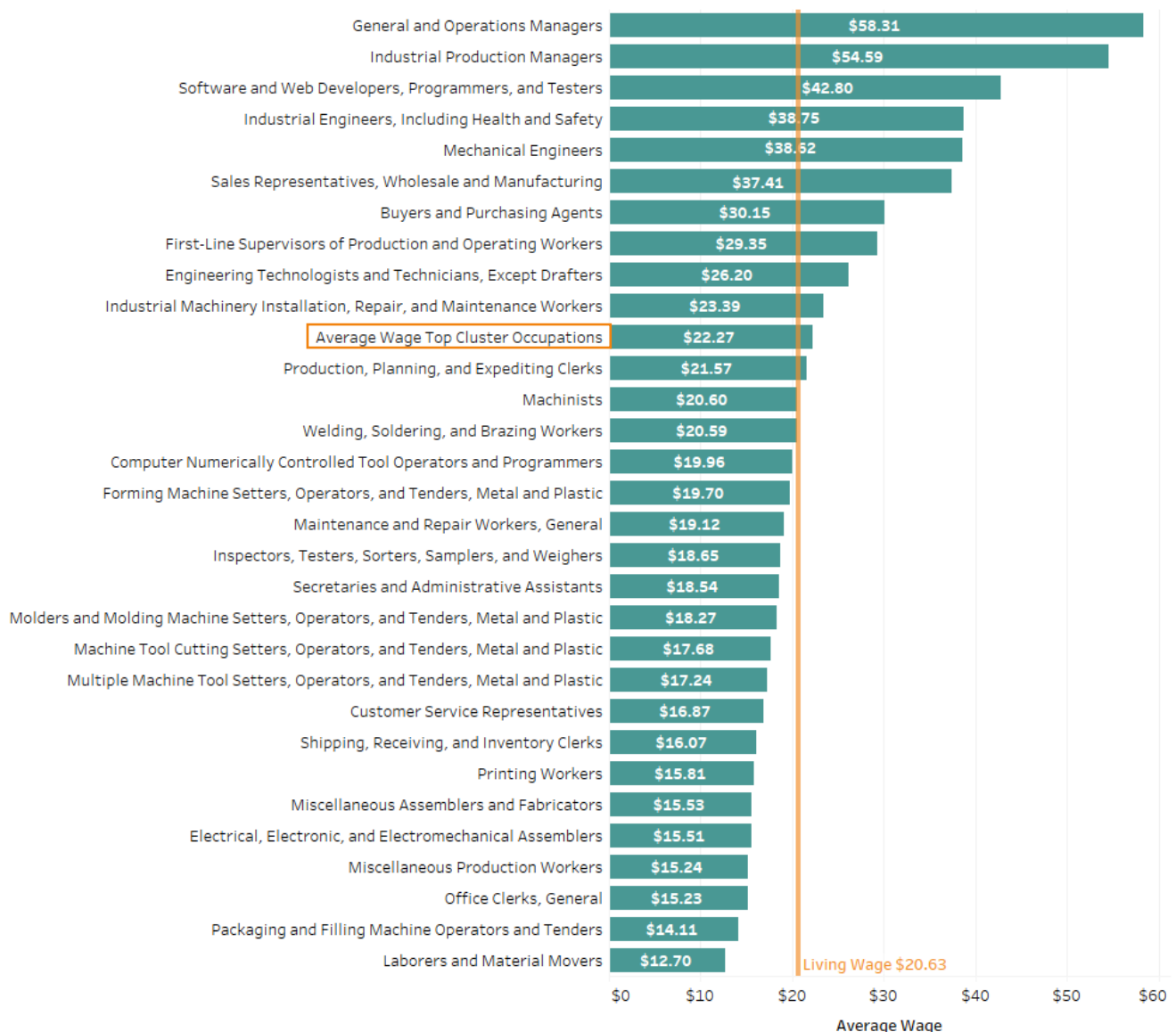
Source: JobsEQ. Employment by Residents represents those who live in the area in that occupation, while Employment by Place of Work represents those employed within that geographic region. Drive-times are 45 minutes from each location—Fort Mill and the City of York.

## Occupations and Wages

The top occupations for the Made in York County target are derived from staffing patterns in the target industry family and are listed in Table 2.2. The employment of these occupations is listed along with that of two drive-time areas and location quotients to illustrate concentration. Because of York County's geography, the eastern and western parts of the County reach different talent pools, therefore a 45-minute drive-time from Fort Mill along I-77 and also a 45-minute drive-time from the City of York. Several strong occupational concentrations of note include *Machinists* (2.0 LQ), *Printing Workers* (1.8 LQ), and *Forming Machine Operators* (1.8 LQ).

Wages for these occupations in York County range from \$12.70 an hour to \$58.31 an hour with the wage for all occupations listed averaging \$22.27. This rate is above the MIT calculation for York County's living wage for a dual-income family of four, which is \$20.63 in the 2021 update. Managers and engineering positions are higher-paid positions, with less skilled labor such as *Laborers and Material Movers* garnering lower rates.

**Figure 2.3 Made in York County: Target Top Occupation Wages compared to York County Living Wage**



Source: JobsEQ 2019 wages, MIT Living Wage Calculation for a dual-income family of four 2021, Garner Economics

**Table 2.3 Made in York County: Target Top 5 Paying Occupations and Skills Transferable Occupations**

High Wage Cluster Occupations	Average Wage	Transferable Occupation	York County Employment	Average Wage
General and Operations Managers	\$58.31	Architects	121	\$36.25
		Construction Managers	266	\$52.31
		First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Transportation, Storage, and Distribution Managers	83	\$50.10
		Logisticians	138	\$30.91
Industrial Production Managers	\$54.59	First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Industrial Engineers	317	\$38.85
		Construction Managers	266	\$52.31
		Mechanical Engineers	234	\$38.61
		First-Line Supervisors of Firefighting and Prevention Workers	59	\$26.68
Software and Web Developers, Programmers, and Testers	\$42.80	Electronics Engineers, Except Computer	62	\$40.67
		Network and Computer Systems Administrators	324	\$37.93
		Web Developers and Digital Interface Designers	110	\$36.35
		Operations Research Analysts	55	\$39.90
		Computer Network Support Specialists	130	\$30.63
Industrial Engineers, including Health and Safety	\$38.75	Architects	121	\$36.25
		Occupational Health and Safety Specialists	75	\$32.26
		First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Construction and Building Inspectors	78	\$23.51
		Surveyors	48	\$33.61
Mechanical Engineers	\$38.62	Health and Safety Engineers	23	\$37.60
		Mechanical Drafters	43	\$25.05
		Mechanical Engineering Technologists and Technicians	38	\$26.63
		Calibration and Engineering Technicians	43	\$30.67
		Industrial Engineering Technicians	79	\$23.94

Source: JobsEQ, Quarterly employment 2020, job transferability based on O\*Net crosswalk and JobsEQ training rank, Garner Economics

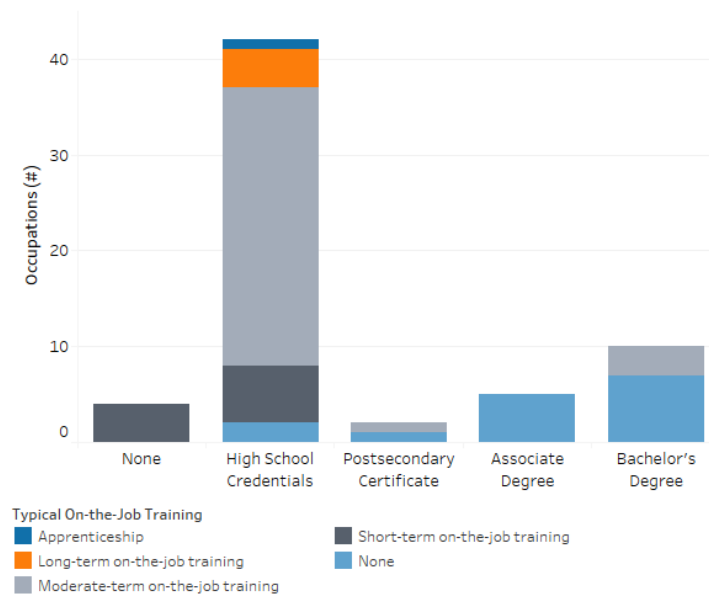
## Education and Training

Wealth-building is at the base of economic development efforts—to bring quality jobs and investment to a community. Most occupations have numerous related jobs that may have transferable skills. Occupation relationships use data from O\*NET to compare occupations based on knowledge, skill, and ability levels. For the top five occupations ranked by hourly pay rates listed in Table 2.3, five transferable occupations with a lower average hourly rate and highly relatable skills are listed to show the possibility of upward mobility for workers.

Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a bachelor's degree with moderate-term on-the-job training (Figure 2.4). Most positions typically need high school credentials in the current staffing pattern for the Made in York County target; however, as automation in the industry increases, so does the need for higher education and technical training. Overall, colleges and universities in a 45-minute drive-time area granted 7,776 certificates and degrees in areas related to target careers.



**Figure 2.4 Made in York County: Typical Education Needed for Target Occupations**



Source: JobsEQ, Garner Economics

**Table 2.4 Made in York County: Related Higher Education Degrees and Certificates Granted in 45-Minute Drive-Time Area, 2019**

Area of Study	Certificate	Associate Degree	Bachelor's Degree	Graduate or Professional Degree	Total
Business, Management & Marketing	543	381	2,072	648	3,644
Computer & Information Sciences	220	133	647	300	1,300
Engineering & Engineering Technologies	182	196	642	241	1,261
Biological & Biomedical Sciences	12	3	542	52	609
Mechanic & Repair Technologies	253	142			395
Mathematics & Statistics			197	93	290
Precision Production	234	43			277
Total	1,444	898	4,100	1,334	7,776

Source: National Center for Education Statistics, Garner Economics



*Agribusiness* is a generic term for the various businesses involved in food production, including farming, agricultural supply, agrichemicals, farm machinery, wholesale and distribution, processing, marketing, and retail sales. The agricultural supply chain may be overlooked as an economic development Asset. Overwhelmingly, stakeholder feedback for targets in York County stated that *Agribusiness* should be considered as part of the recommended business targets.

Farms and businesses sold more than \$100 million in agricultural products during 2017, a 4% increase over five years, according to the USDA. York County farms total over 120,000 acres, and farm-related income increased 134% over the same 5-year period. The County ranked first in South Carolina for the *Nursery, Greenhouse and Floriculture* production, not surprising with Metrolina Greenhouses operations on 175 acres. Other agricultural operations of note include poultry and egg production (\$31 million in 2017 sales) and, of course, famous South Carolina peaches.

*Food and Beverage Processing* industry sector can benefit from the agricultural production in York County and its neighbors. The industry has been undergoing a shift, with consumers increasingly choosing healthy, fresh, organic, local, and ready-to-eat alternatives over traditional products that are mass produced. The rise of meal delivery services like Blue Apron or Hello Fresh adds value to the preparation of raw foods for cooking at home.

York County is well situated for *Food and Beverage Processing* with proximity to regional and national markets and proximity to agricultural products. Included in this target are specialty foods, snack foods, and sauce manufacturing, which are three subsectors of the food processing industry that are undergoing exceptional growth nationally and are forecasted to continue this pattern.

Refrigerated storage is another part of this target that is in high demand and is recommended to support *Agribusiness*. That said, food distribution, in general, is organically occurring and does not need to be a priority for marketing dollars. *Agritourism* is also part of this target and should be advocated by county organizations.

#### Target rationales include:

- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Charlotte Douglas International Airport (P)(C)
- York County had agricultural products sold in excess of \$100 million (P) (C)
- Availability of water/wastewater treatment (P)
- Availability of skilled workers in production and engineering
- Within ½ hour of major university/college (P)(C)
- York Tech Community College (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national 10-year job growth of 19.5% and GDP growth of 21% (P)(C)
- York County 10-year GDP growth of 64% (P)(C)
- York County 10-year forecast of 22.8% for job growth
- York County average wage for target occupations is \$18.73 (P) (C)
- 7,949 degrees and certificates granted in majors related to target (P)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**.



**Table 2.5 Agribusiness Job & GDP Trend & Outlook, 2020**  
**Listed in Priority Rank<sup>5</sup>**

NAICS	Industry	United States			York County			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	LQ
3119	Other Food Manufacturing	22.3%	39.0%	11.7%	2361.1%	113.0%	26.3%	0.4
3111	Animal Food Manufacturing	31.8%	25.3%	16.4%	5222.5%	756.9%	30.5%	0.2
3118	Bakeries and Tortilla Manufacturing	14.3%	8.3%	-1.2%	296.3%	72.5%	21.6%	0.3
1114	Greenhouse, Nursery, and Floriculture Production	34.1%	8.8%	8.0%	-37.0%	-69.8%	24.3%	1.0
49312	Refrigerated Warehousing and Storage	39.7%	40.3%	9.0%	n/a	n/a	n/a	n/a
31211	Soft Drink and Ice Manufacturing	17.1%	7.4%	5.5%	36.8%	-14.1%	21.8%	0.6
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	16.6%	1.7%	-0.2%	n/a	2287.9%	15.1%	0.4
3113	Sugar and Confectionery Product Manufacturing	15.7%	9.5%	-14.7%	834.2%	225.2%	6.8%	0.1
115116	Farm Management Services	64.5%	31.3%	4.9%	-57.5%	35.5%	n/a	0.06
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	7.9%	-1.7%	-8.2%	256.5%	-32.8%	2.8%	0.0
<b>Total Target</b>		<b>21.2%</b>	<b>19.5%</b>	<b>3.0%</b>	<b>64.2%</b>	<b>-18.9%</b>	<b>22.8%</b>	

Source: JobsEQ, Garner Economics

## Occupations and Wages

The top occupations for the *Agribusiness* target are derived from staffing patterns in the target industry family and are listed in Table 2.6. The employment of these occupations is listed along with that of two drive-time areas and location quotients to illustrate concentration. Because of York County's geography, the eastern and western parts of the County reach different talent pools, therefore a 45-minute drive-time from Fort Mill along I-77 and also a 45-minute drive-time from the City of York. Several strong occupational concentrations of note include *Chemical Processing Machine Operators* (1.9 LQ) and general manufacturing support occupations of *Industrial Truck or Forklift Operators*, *Machinery Installation & Maintenance*, and *Industrial Engineers* (all with 1.6 LQ).

Wages for these occupations in York County range from \$9.74 an hour for *Cashiers* to \$58.31 an hour for *General and Operations Managers*. The average wage for all occupations listed for this target is \$18.73. This rate is below the MIT calculation for York County's living wage for a dual-income family of four, which is \$20.63 in the 2021 update. However, 12 occupations pay more per hour than the living wage. Managers and engineering positions are higher-paid positions, along with sales, and less skilled labor, such as *Cashiers*, *Building Cleaning Workers*, and *Food Preparation Workers* earn lower wages.

<sup>5</sup> Priority rank was calculated by ranking historic growth factors in GDP and employment, forecasted employment for the nation and York County along with York County specialization (LQ). Additional weight in score was given to high LQs.

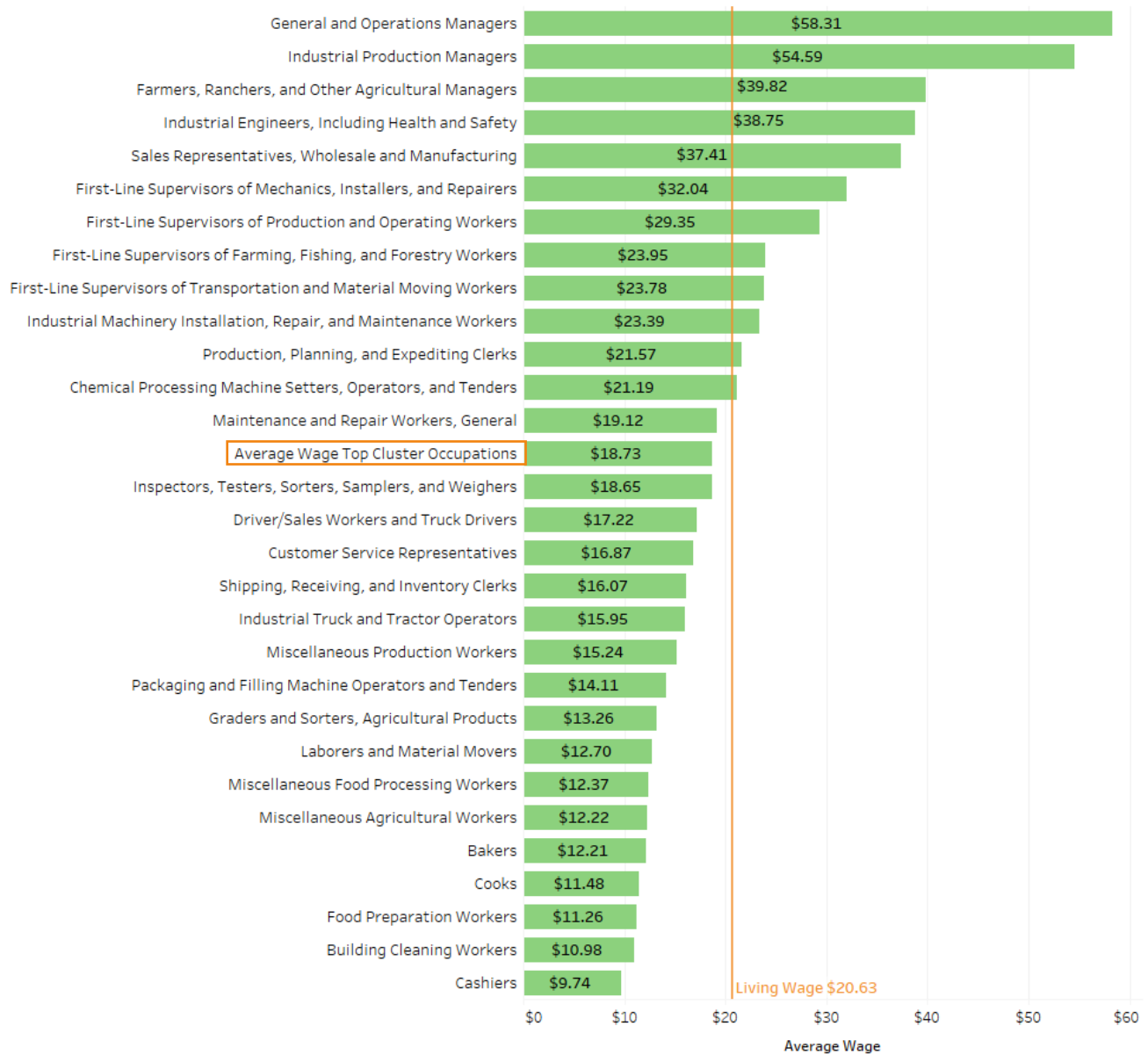
**Table 2.6 Agribusiness: Target Top Occupations, 2020**

SOC	Occupation	York County		LQ	Fort Mill Drive-Time	York Drive-Time
		Employment (Place of Residence)	Employment (Place of Work)		Employment (Place of Residence)	Employment (Place of Residence)
53-7060	Laborers and Material Movers	6,461	5,673	1.3	51,406	29,667
41-2010	Cashiers	3,235	2,889	1.2	26,398	14,640
43-4050	Customer Service Representatives	3,148	2,594	1.3	27,070	13,709
53-3030	Driver/Sales Workers and Truck Drivers	2,950	2,207	0.9	27,223	14,897
37-2010	Building Cleaning Workers	2,465	2,056	0.9	21,446	11,917
35-2010	Cooks	2,130	1,973	1.3	16,906	9,097
11-1020	General and Operations Managers	2,016	1,744	1.1	16,751	8,700
41-4010	Sales Representatives, Wholesale and Manufacturing	1,777	1,383	1.2	15,397	7,969
49-9070	Maintenance and Repair Workers, General	1,373	1,226	1.3	10,442	6,100
53-7050	Industrial Truck and Tractor Operators	806	722	1.6	6,102	3,673
43-5070	Shipping, Receiving, and Inventory Clerks	734	623	1.3	5,350	3,224
51-1010	First-Line Supervisors of Production and Operating Workers	700	601	1.4	4,747	3,270
51-9190	Miscellaneous Production Workers	684	660	1.3	4,952	3,525
51-9060	Inspectors, Testers, Sorters, Samplers, and Weighers	659	540	1.4	4,426	3,022
49-9040	Industrial Machinery Installation, Repair, and Maintenance Workers	609	555	1.6	3,734	2,856
35-2020	Food Preparation Workers	565	509	0.9	4,802	2,546
53-1040	First-Line Supervisors of Transportation and Material Moving Workers	523	380	1.2	3,948	2,154
49-1010	First-Line Supervisors of Mechanics, Installers, and Repairers	506	385	1.2	3,655	2,075
17-2110	Industrial Engineers, Including Health and Safety	382	340	1.6	2,767	1,635
43-5060	Production, Planning, and Expediting Clerks	332	284	1.1	2,396	1,214
11-9010	Farmers, Ranchers, and Other Agricultural Managers	311	302	0.5	2,071	1,536
51-9110	Packaging and Filling Machine Operators and Tenders	243	186	0.7	2,554	1,607
51-9010	Chemical Processing Machine Setters, Operators, and Tenders	240	181	1.9	1,121	688
45-2090	Miscellaneous Agricultural Workers	226	266	0.5	1,778	851
11-3050	Industrial Production Managers	204	162	1.3	1,562	863
51-3090	Miscellaneous Food Processing Workers	133	66	0.4	1,313	963
51-3010	Bakers	128	104	0.8	1,134	640
45-2040	Graders and Sorters, Agricultural Products	10	12	0.4	164	80

Source: JobsEQ. Employment by Residents represents those who live in the area in that occupation, while Employment by Place of Work represents those employed within that geographic region. Drive-times are 45 minutes from each location—Fort Mill and the City of York.



**Figure 2.5 Agribusiness: Target Top Occupation Wages compared to York County Living Wage**



Source: JobsEQ 2019 wages, MIT Living Wage Calculation for a dual-income family of four 2021, Garner Economics

**Table 2.7 Agribusiness: Target Top 5 Paying Occupations and Skills Transferable Occupations**

High Wage Cluster Occupations	Average Wage	Transferable Occupation	York County Employment	Average Wage
General and Operations Managers	\$58.31	Architects	121	\$36.25
		Construction Managers	266	\$52.31
		First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Transportation, Storage, and Distribution Managers	83	\$50.10
		Logisticians	138	\$30.91
Industrial Production Managers	\$54.59	First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Industrial Engineers	317	\$38.85
		Construction Managers	266	\$52.31
		Mechanical Engineers	234	\$38.61
		First-Line Supervisors of Firefighting and Prevention Workers	59	\$26.68
Farmers, Ranchers & Other Agricultural Managers	\$39.82	Occupational Health and Safety Specialists	75	\$32.26
		Landscape Architects	27	\$33.51
		Buyers and Purchasing Agents, Farm Products	10	\$30.10
		First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Chefs and Head Cooks	112	\$24.76
Industrial Engineers, including Health and Safety	\$38.75	Architects	121	\$36.25
		Occupational Health and Safety Specialists	75	\$32.26
		First-Line Supervisors of Mechanics, Installers, and Repairers	385	\$32.07
		Construction and Building Inspectors	78	\$23.51
		Surveyors	48	\$33.61
Sales Representatives, Wholesale & Manufacturing	\$37.41	Market Research Analysts and Marketing Specialists	466	\$31.25
		Advertising Sales Agents	81	\$31.06
		Real Estate Sales Agents	335	\$22.21
		Wholesale and Retail Buyers, Except Farm Products	109	\$29.95
		Loan Officers	485	\$33.56

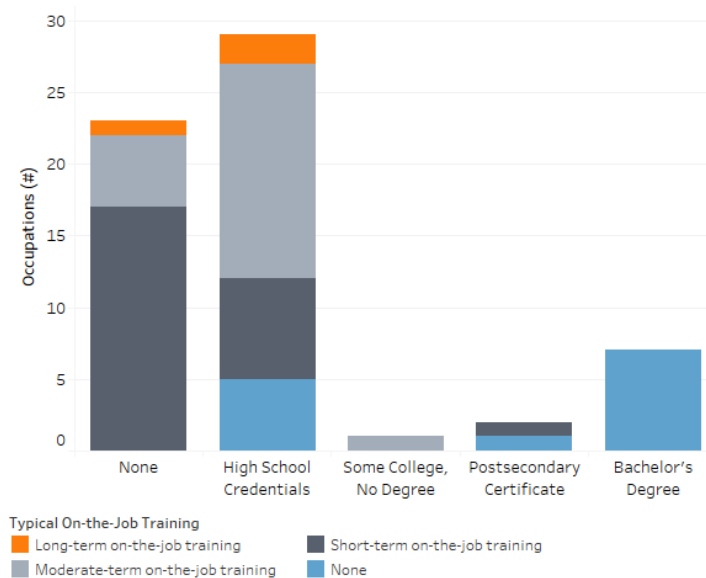
Source: JobsEQ, Quarterly employment 2020, job transferability based on O\*Net crosswalk and JobsEQ training rank, Garner Economics

## Education and Training

The top five occupations in the *Agribusiness* target are listed in Table 2.7 and ranked by hourly pay rates. Each of these roles has five transferable occupations listed with a lower average hourly rate and highly relatable skills.

Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a bachelor's degree (Figure 2.6). Most positions in this target typically need high school credentials; however, numerous occupations do not need higher education. This target will also be affected by automation, and future staffing patterns may require higher credentials and technical skills for workers. Overall, colleges and universities in a 45-minute drive-time area granted 7,949 certificates and degrees in areas related to target careers. Notably, Johnson & Wales University, the well-known culinary institute, has a campus in neighboring Charlotte and graduated 324 students with an associate degree in Culinary Services in 2019.

**Figure 2.6 Agribusiness: Typical Education Needed for Target Occupations**



Source: JobsEQ, Garner Economics

**Table 2.8 Agribusiness: Related Higher Education Degrees and Certificates Granted in 45-Minute Drive-Time Area, 2019**

Area of Study	Certificate	Associate Degree	Bachelor's Degree	Graduate or Professional Degree	Total
Business, Management & Marketing	543	381	2,072	648	3,644
Computer & Information Sciences	220	133	647	300	1,300
Engineering & Engineering Technologies	182	196	642	241	1,261
Personal & Culinary Services	142	410			552
Mechanic & Repair Technologies	253	142			395
Mathematics & Statistics			197	93	290
Precision Production	234	43			277
Family & Consumer Sciences/Human Sciences	56	27	108	18	209
Agriculture, Agriculture Operations & Related Sciences	7	14			21
<b>Total</b>	<b>1,637</b>	<b>1,346</b>	<b>3,666</b>	<b>1,300</b>	<b>7,949</b>

Source: National Center for Education Statistics, Garner Economics



Imagined in York County target encompasses businesses considered to be in the knowledge sector. York County is an attractive option for headquarters, business services, and other professional operations. With the presence of LPL Financial, Wells Fargo, and Citi Financial in York County, there is a strong concentration of financial talent to build upon.

In addition to finance, other staff support functions including customer service, legal, logistics, sales, and marketing can be co-located as headquarter or regional operations for global companies to achieve efficiencies and cost savings. The proximity to the Charlotte Douglas International Airport, the 11th busiest airport in the U.S., is a clear advantage.

#### ***Fintech/Insurtech***

Consumer trends toward self-service in the finance, insurance, and health care industries create the Fintech and Insurtech sectors, which blend deep industry knowledge with the accessibility, predictability, and analytics that technology provides. These new iterations aim to compete with traditional methods in the delivery of services. For instance, Fintech would involve areas such as app design, digital money management, and support. Insurtech reflects internet-driven insurance business, digital claims processing, and other technological advances.

#### ***IT, Data & Analytics***

Another aspect of the target is the business of data—data processing, analytics, data centers, and internet publishing and web portals. The latter would be internet-based media such as social media platforms, search portals, video sites, and sports sites. The specific subsector—internet publishing and web portals—grew 189% nationally over the past decade in employment and added 563% in GDP. In York County, this subsector increased 56% in employment and 86% in GDP.

The limited supply of Class A and Class B office buildings and high-speed internet in some areas of the County are challenges for this target.

#### **Target rationales include:**

- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Charlotte Douglas International Airport (P)(C)
- Availability of skilled admin support workers (P)
- Availability of management of companies and enterprises (P)
- Within ½ hour of major university/college (P)(C)
- York Tech Community College (P)(C)
- Competitive cost of labor (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Low crime, housing options (P)(C)
- Historical national 10-year job growth of 24% and GDP growth of 80% (P)(C)
- York County 10-year job growth of 189% and GDP growth of 171% (P)(C)
- York County 10-year forecast of 23.4% for job growth
- York County average wage for target occupations (\$32.03) is higher than living wage (\$20.63) (C)
- 10,221 degrees and certificates granted in majors related to target (P)

*Legend: Items appealing to needs of **prospects (P)** or **community (C)**.*



**Table 2.9 Imagined in York County Job & GDP Trend & Outlook, 2020**  
**Listed in Priority Rank<sup>6</sup>**

NAICS	Industry	United States			York County			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	LQ
55	Management of Companies and Enterprises	70.7%	26.8%	5.7%	4911.3%	3342.5%	22.0%	2.9
5416	Management, Scientific, and Technical Consulting Services	71.5%	43.4%	18.2%	235.2%	205.1%	33.9%	0.9
5415	Computer Systems Design and Related Services	102.2%	49.5%	24.8%	181.4%	118.4%	37.1%	0.3
5182	Data Processing, Hosting, and Related Services	164.3%	40.8%	10.3%	1197.5%	758.1%	27.3%	2.6
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	65.4%	15.7%	1.7%	374.5%	413.3%	17.8%	0.7
5611	Office Administrative Services	62.3%	26.0%	14.8%	82.4%	21.5%	30.3%	1.1
51913	Internet Publishing and Web Search Portals	563.2%	188.9%	11.7%	86.0%	56.1%	18.3%	0.1
5223	Activities Related to Credit Intermediation	111.8%	16.0%	-2.4%	214.2%	958.9%	14.0%	3.5
5413	Architectural, Engineering, and Related Services	36.4%	15.5%	0.1%	59.6%	57.2%	16.3%	1.0
5241	Insurance Carriers	59.4%	4.1%	1.5%	84.1%	6.7%	13.4%	0.2
5251	Insurance and Employee Benefit Funds	-15.3%	-86.4%	19.9%	-98.3%	-97.9%	36.2%	0.8
5412	Accounting, Tax, Bookkeeping, and Payroll Services	47.3%	10.5%	0.0%	9.2%	-17.0%	14.0%	0.4
<b>Total Target</b>		<b>80.1%</b>	<b>24.4%</b>	<b>9.5%</b>	<b>171.4%</b>	<b>189.9%</b>	<b>23.4%</b>	

Source: JobsEQ, Garner Economics

## Occupations and Wages

The top occupations for the Imagined in York County target are derived from staffing patterns in the target industry family and are listed in Table 2.10. The employment of these occupations is listed along with that of two drive-time areas and location quotients to illustrate concentration. Because of York County's geography, the eastern and western parts of the County reach different talent pools, therefore a 45-minute drive-time from Fort Mill along I-77 and also a 45-minute drive-time from the City of York. Several occupational concentrations of note include *Customer Services Representatives* (1.3 LQ), and the supervisory occupations over sales, office and administrative workers, which also have a 1.3 LQ.

Wages for occupations in the Imagined in York County are relatively higher, with 83% of roles paying more than the MIT living wage for a dual-income family of four in York County (\$20.63 in the 2021 update). Once again, management roles top the list for pay ranges; however, the remainder are distributed among finance, IT, and support positions. The pay scale ranges from \$15.23 an hour for *Office Clerks* to \$71.99 an hour for *Financial Managers*. The average wage for all occupations listed for this target is \$32.03.

<sup>6</sup> Priority rank was calculated by ranking historic growth factors in GDP and employment, forecasted employment for the nation and York County along with York County specialization (LQ). Additional weight in score was given to high LQs.

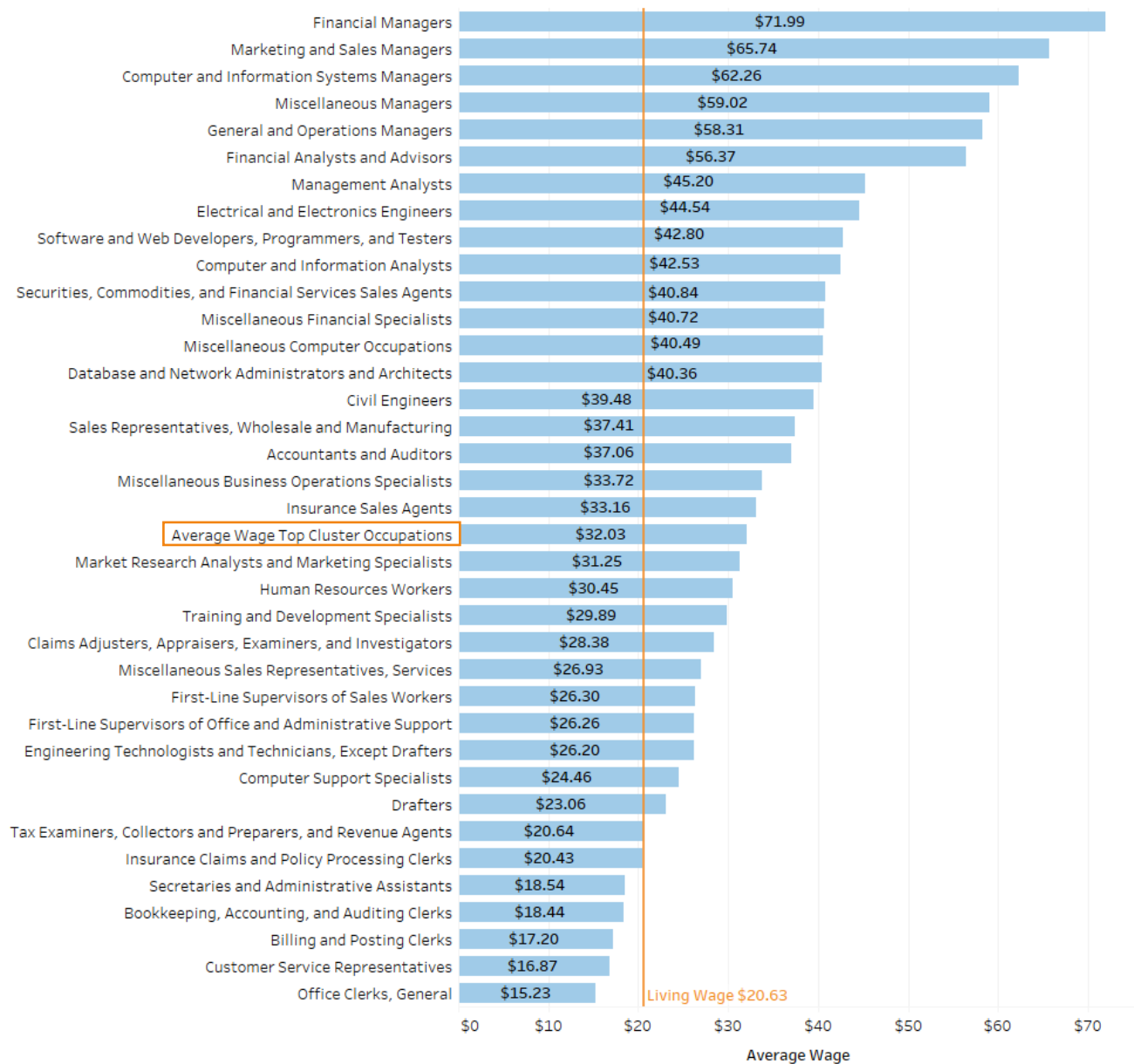


**Table 2.10 Imagined in York County: Target Top Occupations, 2020**

SOC	Occupation	York County		LQ	Fort Mill Drive-Time	York Drive-Time
		Employment (Place of Residence)	Employment (Place of Work)		Employment (Place of Residence)	Employment (Place of Residence)
43-4050	Customer Service Representatives	3,148	2,594	1.3	27,070	13,709
43-6010	Secretaries and Administrative Assistants	2,888	2,354	1.0	22,858	11,817
43-9060	Office Clerks, General	2,313	1,706	0.8	21,627	11,050
11-1020	General and Operations Managers	2,016	1,744	1.1	16,751	8,700
41-1010	First-Line Supervisors of Sales Workers	1,859	1,586	1.3	15,227	7,891
41-4010	Sales Representatives, Wholesale and Manufacturing	1,777	1,383	1.2	15,397	7,969
43-1010	First-Line Supervisors of Office and Administrative Support Workers	1,589	1,352	1.3	13,027	6,649
43-3030	Bookkeeping, Accounting, and Audit Clerks	1,441	1,106	1.0	13,793	6,791
15-1250	Software and Web Developers, Programmers, and Testers	1,225	733	0.6	14,860	6,857
13-2010	Accountants and Auditors	1,148	879	0.9	12,088	5,855
41-3090	Sales Representatives, Services	889	559	0.8	10,087	4,772
15-1230	Computer Support Specialists	845	570	1.0	7,839	3,715
15-1210	Computer and Information Analysts	758	492	1.0	9,143	4,145
11-9190	Miscellaneous Managers	698	532	0.7	7,765	3,647
13-1110	Management Analysts	692	557	1.0	6,905	3,345
15-1240	Database and Network Administrators/Architects	626	449	1.0	6,212	2,934
13-1160	Market Research Analysts and Marketing Specialists	616	466	1.0	6,386	2,993
11-3030	Financial Managers	599	430	0.9	6,555	2,989
13-1070	Human Resources Workers	594	445	0.9	5,894	2,883
11-2020	Marketing and Sales Managers	548	417	0.9	5,465	2,544
13-1190	Business Operations Specialists	544	184	0.2	8,597	3,730
41-3030	Securities, Commodities, and Financial Services Sales Agents	529	337	1.1	7,215	3,063
43-3020	Billing and Posting Clerks	426	289	0.9	3,687	1,791
41-3020	Insurance Sales Agents	396	256	0.8	4,460	2,148
13-2090	Miscellaneous Financial Specialists	378	226	0.7	5,068	2,226
13-2050	Financial Analysts and Advisors	358	212	0.9	4,786	2,118
11-3020	Computer and Information Systems Managers	352	226	0.7	4,130	1,860
13-1150	Training and Development Specialists	319	244	1.1	2,834	1,350
17-2050	Civil Engineers	266	197	0.9	2,641	1,221
17-2070	Electrical and Electronics Engineers	233	181	0.8	2,206	1,045
13-1030	Claims Adjusters, Appraisers and Examiners	212	98	0.5	2,686	1,165
15-1290	Miscellaneous Computer Occupations	178	120	0.4	1,994	906

Source: JobsEQ. Employment by Residents represents who live in the area engaged in that occupation, while Employment by Place of Work represent those employed within that geographic region. Drive-Times are 45 minutes from each location—Fort Mill and the City of York.

**Figure 2.7 Imagined in York County: Target Top Occupation Wages compared to York County Living Wage**



Source: JobsEQ 2019 wages, MIT Living Wage Calculation for a dual-income family of four 2021, Garner Economics

**Table 2.11 Imagined in York County: Target Top 5 Paying Occupations and Skills Transferable Occupations**

High Wage Cluster Occupations	Average Wage	Transferable Occupation	York County Employment	Average Wage
Financial Managers	\$71.99	Accountants and Auditors	879	\$37.07
		Personal Financial Advisors	168	\$62.40
		Cost Estimators	131	\$28.27
		Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	559	\$26.92
		General and Operations Managers	1,744	\$58.32
Marketing & Sales Managers	\$65.74	Market Research Analysts and Marketing Specialists	466	\$31.25
		Advertising Sales Agents	81	\$31.06
		Public Relations Specialists	135	\$32.74
		Management Analysts	557	\$45.19
		Property, Real Estate, and Community Association Managers	181	\$29.62
Computer and Information Systems Managers	\$39.82	Surveyors	48	\$33.61
		Network and Computer Systems Administrators	324	\$37.93
		Logisticians	138	\$30.91
		Project Management Specialists and Business Operations Specialists, All Other	184	\$33.70
		Instructional Coordinators	107	\$27.02
General and Operations Managers	\$38.75	Architects	121	\$36.25
		Purchasing Agents, Except Wholesale, Retail, and Farm Products	223	\$30.24
		Food Service Managers	241	\$26.78
		First-Line Supervisors of Office and Administrative Support Workers	1,352	\$26.25
		First-Line Supervisors of Personal Service and Entertainment and Recreation Workers	210	\$19.86
Financial Analysts and Advisors	\$56.37	Purchasing Agents, Except Wholesale, Retail, and Farm Products	223	\$30.24
		Transportation, Storage, and Distribution Managers	83	\$50.10
		First-Line Supervisors of Non-Retail Sales Workers	300	\$44.76
		Loan Officers	485	\$33.56
		Management Analysts	557	\$45.19

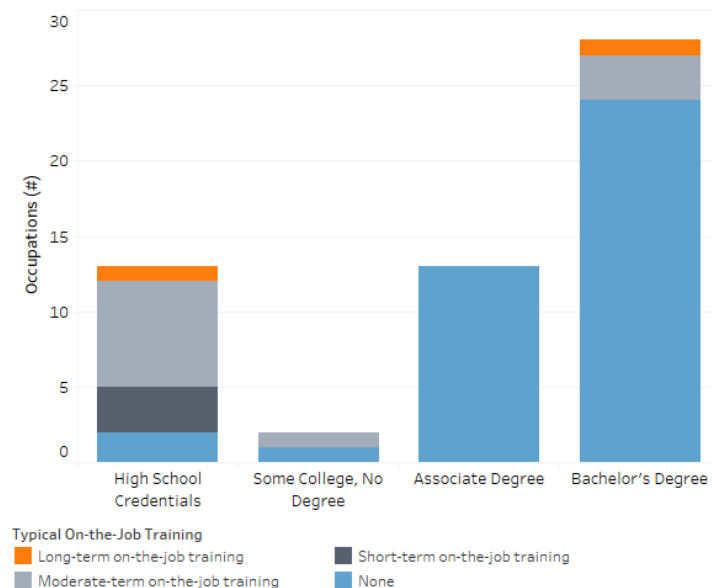
Source: JobsEQ, Quarterly employment 2020, job transferability based on O\*Net crosswalk and JobsEQ training rank, Garner Economics

## Education and Training

The top five occupations in the Imagined in York County target are listed in Table 2.11 and ranked by hourly pay rates. Each of these roles has five transferable occupations listed with a lower average hourly rate and highly relatable skills. This target and its roles have many transferable skills, particularly within the business and finance categories.

Education and training levels needed for entry into target occupations are elevated for the talent for Imagined in York County. All occupations listed need at least high school credentials with the majority of roles requiring a bachelor's degree (Figure 2.8). Colleges and universities in a 45-minute drive-time area granted 10,221 certificates and degrees in areas related to target careers.

**Figure 2.8 Imagined in York County: Typical Education Needed for Target Occupations**



Source: JobsEQ, Garner Economics

**Table 2.12 Imagined in York County: Related Higher Education Degrees and Certificates Granted in 45-Minute Drive-Time Area, 2019**

Area of Study	Certificate	Associate Degree	Bachelor's Degree	Graduate or Professional Degree	Total
Business, Management & Marketing	543	381	2,072	648	3,644
Liberal Arts & Sciences	166	2,285	47	9	2,507
Computer & Information Sciences	220	133	647	300	1,300
Engineering & Engineering Technologies	182	196	642	241	1,261
Communication, Journalism & Related Programs	22		587	55	664
English Language			252	107	359
Mathematics & Statistics			197	93	290
Communications Technologies	73	28			101
Legal Professions & Studies	28	67			95
<b>Total</b>	<b>1,234</b>	<b>3,090</b>	<b>4,444</b>	<b>1,453</b>	<b>10,221</b>

Source: National Center for Education Statistics, Garner Economics



York County has many assets which attract businesses and residents alike. The County has a low cost of living, excellent housing options, low crime and quality hotels. A recurring theme among stakeholders is that York County struggles to compete for young professional workers with neighboring Charlotte. This target aims to round out York County's quality of place. Garner Economics has coined the phrase **"Talent Is The New Currency™"** and any economic development plan today should include placemaking.

This sector may not be in the traditional economic development wheelhouse; however, finding community partners to help establish and build a better sense of place is a great benefit to attracting and retaining talent. Subsectors include *Craft Breweries*, *Small-Batch Distilleries*, *Boutique or Specialized Retail*, and *Sports Medicine*.

Breweries and distilleries are growing rapidly nationwide and are a popular fixture in most cities and towns offering different vibes for a mix of consumers. Retail in the post-COVID-19 economy and for this target should be boutique, unique, or specialty to bring consumers something that cannot be found at the average strip mall or experienced when shopping online.

As mentioned earlier, York County is becoming known for sports. The Carolina Panthers are adding a major development and sports complex. The BMX Supercross track in Rock Hill also brings in visitors and sports enthusiasts. Adding sports retail outlets and developing an area of expertise in *Sports Medicine* can build upon that sports marketing momentum occurring in the County.

#### Target rationales include:

- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Charlotte Douglas International Airport (P)(C)
- Within ½ hour of major university/college (P)(C)
- York Tech Community College (P)(C)
- Competitive cost of labor (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Low crime, housing options (P)(C)
- York County 10-year job growth of 1.6% and GDP growth of 2.2% (P)(C)
- York County average wage for target occupations is \$18.70 (P)
- 10,221 degrees and certificates granted in majors related to target (P)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**.





**2.13 Experience York County Job & GDP Trend & Outlook, 2020**  
**Listed in Priority Rank<sup>7</sup>**

NAICS	Industry	United States			York County			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	LQ
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	0.7%	0.4%	0.3%	2.1%	1.4%	0.5%	0.6
31212	Breweries	0.5%	2.3%	0.05%		669.5%	0.2%	1.6
453	Miscellaneous Store Retailers	0.3%	-0.04%	-0.1%	2.2%	1.6%	-0.01%	1.6
4511	Sporting Goods, Hobby, and Musical Instrument Stores	0.3%	-0.09%	0.01%	1.8%	1.2%	0.2%	1.4
31214	Distilleries	0.8%	1.5%	0.05%				
4452	Specialty Food Stores	0.2%	-0.03%	-0.03%	0.7%	1.3%	0.1%	0.9
<b>Total Target</b>		<b>0.3%</b>	<b>0.05%</b>	<b>0.01%</b>	<b>2.2%</b>	<b>1.6%</b>	<b>0.1%</b>	

Source: JobsEQ, Garner Economics

## Occupations and Wages

The Experience York County target staffing patterns reveal occupations in the industry family and are listed in Table 2.14. The employment of these occupations is listed along with that of two drive-time areas and location quotients to illustrate concentration. Because of York County's geography, the east and western parts of the County reach different talent pools, therefore a 45-minute drive-time from Fort Mill along I-77 and also a 45-minute drive-time from the City of York.

Occupations vary greatly and are either related to retail, brewery and distillery operations, or sports medicine. Wages range from \$9.29 per hour for *Fast Food and Counter Workers* to \$65.74 per hour for *Marketing and Sales Managers*. Wages for occupations for this target are somewhat lower overall with an average wage of \$18.70. This rate is below the MIT calculation for York County's living wage for a dual-income family of four, which is \$20.63 in the 2021 update. Eleven occupations have hourly rates higher than the living wage among the top occupations in the target. Managerial, sales, and therapists are the highest paid positions among these in-demand occupations.

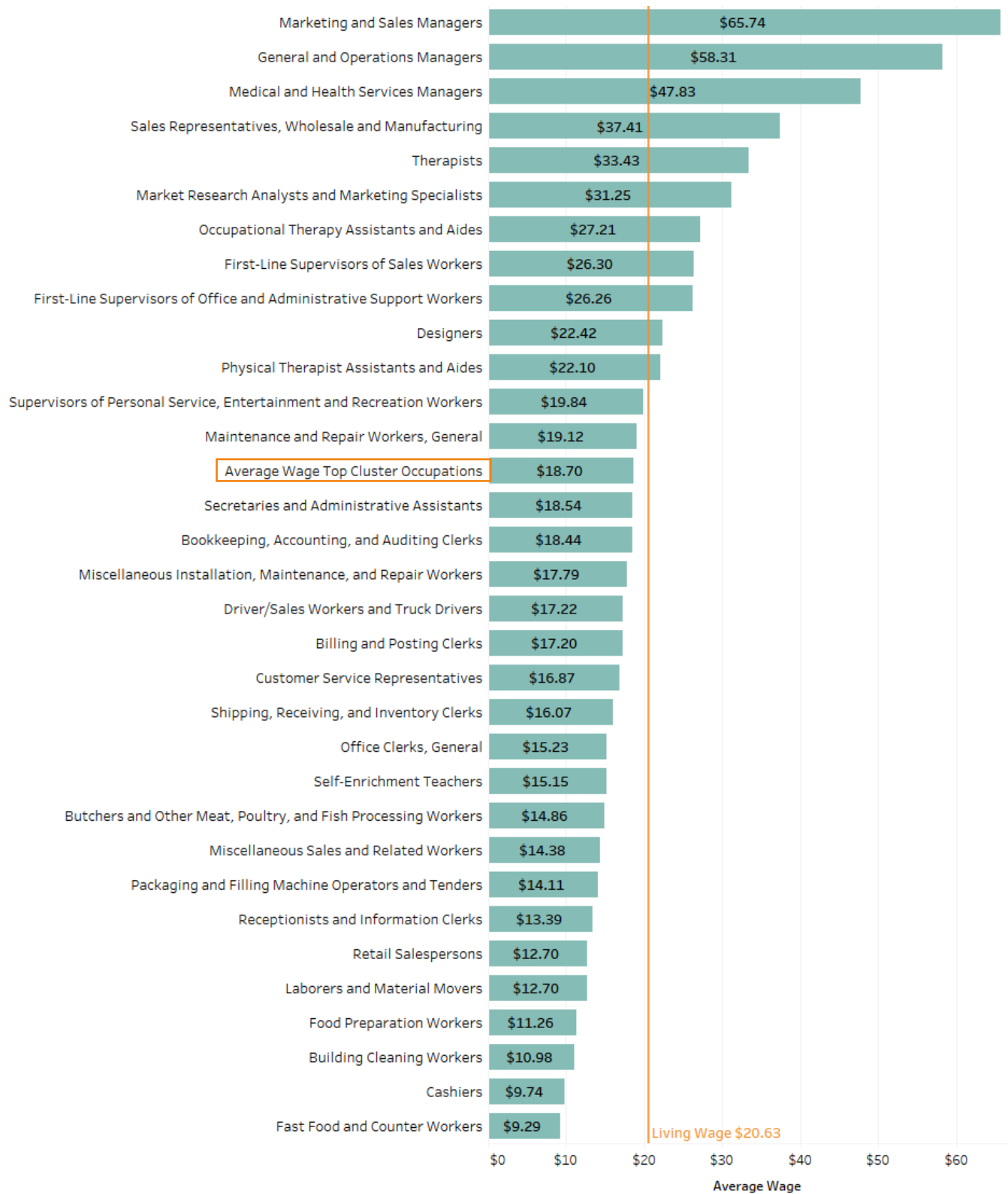
<sup>7</sup> Priority rank was calculated by ranking historic growth factors in GDP and employment, forecasted employment for the nation and York County along with York County specialization (LQ). Additional weight in score was given to high LQs.

**2.14 Experience York County: Target Top Occupations, 2020**

SOC	Occupation	York County		LQ	Fort Mill Drive-Time	York Drive-Time
		Employment (Place of Residence)	Employment (Place of Work)		Employment (Place of Residence)	Employment (Place of Residence)
53-7060	Laborers and Material Movers	6,461	5,673	1.3	51,406	29,667
41-2030	Retail Salespersons	4,287	3,712	1.3	33,848	17,961
35-3020	Fast Food and Counter Workers	3,726	3,372	1.3	29,845	16,421
53-3030	Driver/Sales Workers and Truck Drivers	2,950	2,207	0.9	27,223	14,897
43-4050	Customer Service Representatives	3,148	2,594	1.3	27,070	13,709
41-2010	Cashiers	3,235	2,889	1.2	26,398	14,640
43-6010	Secretaries and Administrative Assistants	2,888	2,354	1.0	22,858	11,817
43-9060	Office Clerks, General	2,313	1,706	0.8	21,627	11,050
37-2010	Building Cleaning Workers	2,465	2,056	0.9	21,446	11,917
11-1020	General and Operations Managers	2,016	1,744	1.1	16,751	8,700
41-4010	Sales Representatives, Wholesale and Manufacturing	1,777	1,383	1.2	15,397	7,969
41-1010	First-Line Supervisors of Sales Workers	1,859	1,586	1.3	15,227	7,891
43-3030	Bookkeeping, Accounting, and Auditing Clerks	1,441	1,106	1.0	13,793	6,791
43-1010	First-Line Supervisors of Office and Administrative Support Workers	1,589	1,352	1.3	13,027	6,649
49-9070	Maintenance and Repair Workers, General	1,373	1,226	1.3	10,442	6,100
43-4170	Receptionists and Information Clerks	961	665	0.9	9,433	4,676
13-1160	Market Research Analysts and Marketing Specialists	616	466	1.0	6,386	2,993
11-2020	Marketing and Sales Managers	548	417	0.9	5,465	2,544
43-5070	Shipping, Receiving, and Inventory Clerks	734	623	1.3	5,350	3,224
27-1020	Designers	576	487	1.1	5,127	2,432
35-2020	Food Preparation Workers	565	509	0.9	4,802	2,546
29-1120	Therapists	428	369	0.7	4,327	2,268
43-3020	Billing and Posting Clerks	426	289	0.9	3,687	1,791
25-3020	Self-Enrichment Teachers	347	301	1.3	3,002	1,455
51-9110	Packaging and Filling Machine Operators and Tenders	243	186	0.7	2,554	1,607
11-9110	Medical and Health Services Managers	264	192	0.7	2,340	1,224
51-3020	Butchers and Other Meat, Poultry, and Fish Processing Workers	141	124	0.5	2,243	1,021
49-9090	Miscellaneous Installation, Maintenance, and Repair Workers	264	185	0.7	2,239	1,342
39-1090	First-Line Supervisors of Personal Service, Entertainment and Recreation Workers	280	210	1.1	1,880	972
41-9090	Miscellaneous Sales and Related Workers	222	194	1.3	1,746	832
31-2020	Physical Therapist Assistants and Aides	127	68	0.7	666	391

Source: JobsEQ. Employment by Residents represents who live in the area engaged in that occupation, while Employment by Place of Work represent those employed within that geographic region. Drive-times are 45 minutes from each location—Fort Mill and the City of York.

**Figure 2.9 Experience York County: Target Top Occupation Wages Compared to York County Living Wage**



Source: JobsEQ 2019 wages, MIT Living Wage Calculation for a dual-income family of four 2021, Garner Economics

**2.15 Experience York County: Target Top 5 Paying Occupations and Skills Transferable Occupations**

High Wage Cluster Occupations	Average Wage	Transferable Occupation	York County Employment	Average Wage
Marketing & Sales Managers	\$65.74	Market Research Analysts and Marketing Specialists	466	\$31.25
		Advertising Sales Agents	81	\$31.06
		Public Relations Specialists	135	\$32.74
		Management Analysts	557	\$45.19
		Property, Real Estate, and Community Association Managers	181	\$29.62
General and Operations Managers	\$38.75	Architects	121	\$36.25
		Purchasing Agents, Except Wholesale, Retail, and Farm Products	223	\$30.24
		Food Service Managers	241	\$26.78
		First-Line Supervisors of Office and Administrative Support Workers	1,352	\$26.25
		First-Line Supervisors of Personal Service and Entertainment and Recreation Workers	210	\$19.86
Medical and Health Services Managers	\$47.83	Social and Community Service Managers	57	\$31.35
		First-Line Supervisors of Police and Detectives	76	\$34.81
		Education Administrators, Kindergarten through Secondary	236	\$34.95
		Occupational Health and Safety Specialists	75	\$32.26
		First-Line Supervisors of Firefighting and Prevention Workers	59	\$26.68
Sales Representatives, Wholesale & Manufacturing	\$37.41	Market Research Analysts and Marketing Specialists	466	\$31.25
		Advertising Sales Agents	81	\$31.06
		Real Estate Sales Agents	335	\$22.21
		Wholesale and Retail Buyers, Except Farm Products	109	\$29.95
		Loan Officers	485	\$33.56
Market Research Analysts and Marketing Specialists	\$31.25	Advertising Sales Agents	81	\$31.06
		Real Estate Sales Agents	335	\$22.21
		Librarians and Media Collections Specialists	90	\$26.35
		Purchasing Agents, Except Wholesale, Retail, and Farm Products	223	\$30.24
		Meeting, Convention, and Event Planners	71	\$20.19

Source: JobsEQ, Quarterly employment 2020, job transferability based on O\*Net crosswalk and JobsEQ training rank, Garner Economics

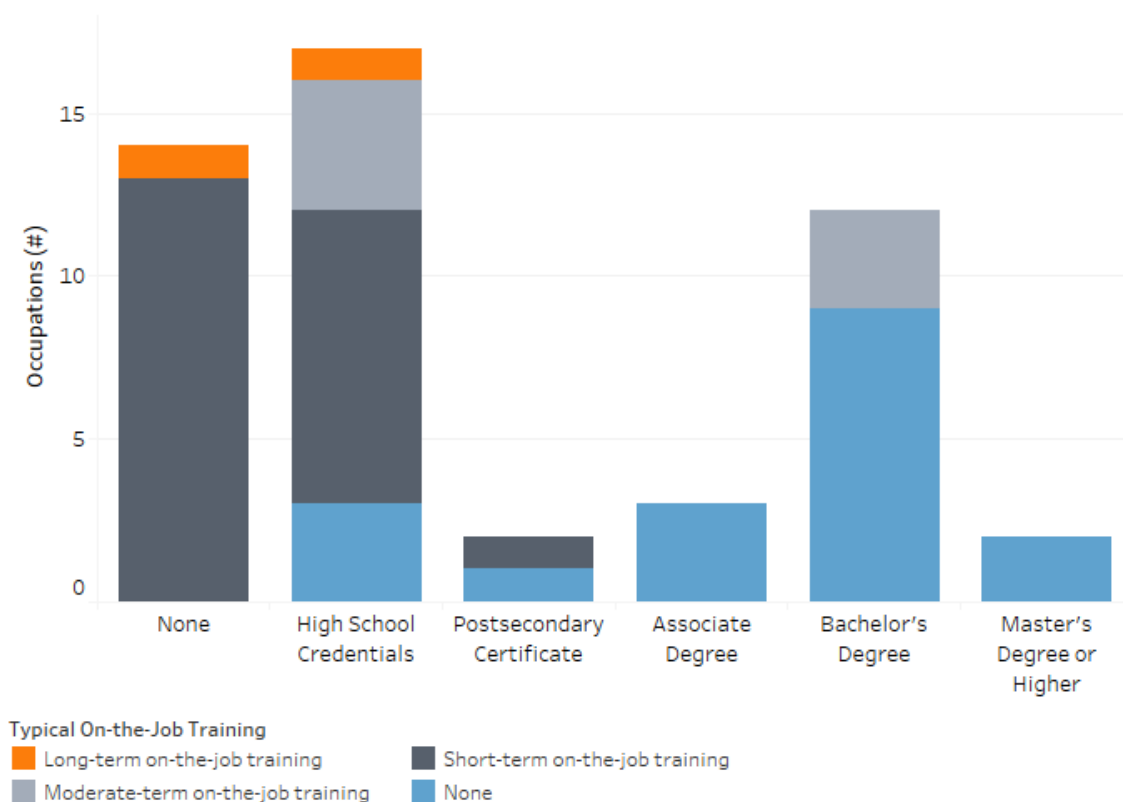
Note: Therapists Occupation did not have crosswalk results.

## Education and Training

Several top occupations for the Experience York County target are listed in Table 2.15 and ranked by hourly pay rates. Each of these roles has five transferable occupations listed with a lower average hourly rate and highly relatable skills. These are generally marketing and sales positions with one medical manager role related to sports medicine within the target.

Education and training levels needed for entry into target occupations range from no education and short-term on-the-job training needed to jobs requiring a master's or professional degree (Figure 2.10). Colleges and universities in a 45-minute drive-time area granted 12,346 certificates and degrees in areas related to target careers.

**Figure 2.10 Experience York County: Typical Education Needed for Target Occupations**



Source: JobsEQ, Garner Economics

**Table 2.16 Experience York County: Related Higher Education Degrees and Certificates  
Granted in 45-Minute Drive-Time Area, 2019**

Area of Study	Certificate	Associate Degree	Bachelor's Degree	Graduate or Professional Degree	Total
Business, Management & Marketing	543	381	2,072	648	3,644
Health Professions & Related Programs	776	794	780	583	2,933
Liberal Arts & Sciences	166	2,285	47	9	2,507
Computer & Information Sciences	220	133	647	300	1,300
Communication, Journalism & Related Programs	22		587	55	664
Personal & Culinary Services	142	410			552
Parks, Recreation, Leisure & Fitness Studies	7	3	482	45	537
Family & Consumer Sciences/Human Sciences	56	27	108	18	209
<b>Total</b>	<b>1,932</b>	<b>4,033</b>	<b>4,723</b>	<b>1,658</b>	<b>12,346</b>

Source: National Center for Education Statistics, Garner Economics



## Chapter 3: Recommendations to Achieve Success

To ensure that York County and its EDD can meet its full potential, leverage its assets, and strengthen its business climate to retain current companies and attract the recommended business targets, the County and its many partners must be proactive in driving York County’s economic future and setting it apart from other peer jurisdictions.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase 1. These also build upon the assessments made to prioritize the business targets identified in Chapter 7. Finally, some of the recommendations validate and support the County’s goals in its most recent County Council leadership workshop.

As noted in the introductory chapters, this assessment—and the observations herein—were developed from a site selector’s perspective. The recommendations are built with an eye toward those areas that may differentiate the County. The goal of this strategy is to provide a framework for the community to consider its economic development service delivery and activities to support and augment York County’s work to recruit companies and the work of other city, county, regional, and local entities engaged in economic development.

Recommendations for action are categorized under three areas of opportunity: **Asset Development (Product Improvement)**, **Communicate the Brand (Marketing)** and **Execute Effectively**. In some instances, and where relevant and possible, a cost estimate to implement the noted recommendation has been offered. An estimated timeline for the optimal application of the recommendations is also included (where applicable).

FIGURE 3.1: RECOMMENDATION CATEGORIES



## Asset Development

### **1. Create an infrastructure, land use, and funding plan to provide water and sewer to targeted areas of the County.** This effort will maximize the potential for new sites in optimal locations within York County.

*No product, No project™* is a long-used trademarked mantra of Garner Economics. 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 private sector 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. For Class A and B office space, there is over 7.6 million RBA and a vacancy rate of 6.1%. Thus, the office supply is more limited. York County has been tremendously successful in the attraction and retention of business over the years. But as a result of that success, the availability of land for industrial, office, and commercial development that has the infrastructure in place is becoming scarcer. This is especially true in the western section of York County where infrastructure is spotty. Other parts of the County also have competing land uses, lack of utility infrastructure, and lack of control of available sites. This makes the availability of product problematic.

We believe that in the realm of economic development success, the entity that controls the dirt, controls the project. That is why publicly owned business and office parks are a great tool used to control your economic development destiny. This effort should complement the County's land use comprehensive plan which is currently going through an update.

### **2. Develop a collaborative product development plan with public and private stakeholders.**

As noted above, utility infrastructure (water, sewer, gas, broadband, roads) are needed to develop sites. This recommendation elevates the process by taking the next step in creating the actual industrial/ business parks, and buildings.

The County should collaborate with private developers, existing landowners and municipalities to improve property, which in turn will attract the targeted business sectors. This may include incentivizing developers to create spec buildings or improve land for economic development. **York County, either in collaboration with private or municipal parties or the private sector, should consider acquiring a site of 100 acres or more to develop a publicly held industrial park.** York should also consider developing (in collaboration with others) a 50,000 sq. ft. industrial shell/spec building, expandable to 100,000 sq. ft. to accommodate the typical space demands of the targeted business sectors noted in the previous chapter.

**a) Develop a more specific plan for the County EDF and the American Rescue Plan to supplement product development.**

The County Council created a Product Development Fund in 2016 with the intent of Council to direct an amount of 10% of the revenue received annually, pursuant to any negotiated fee-in-lieu of tax arrangement or other incentive arrangements to the EDF. This ordinance was amended in 2018 for clarification. In essence, this is a discretionary fund used by the County Council for economic development purposes. Additionally, the Federal government recently enacted the American Rescue Plan. Monies have been appropriated to counties and cities based on population. York County has been appropriated \$54.99 million. Rock Hill, \$13.24 million. Infrastructure improvements and product development are accepted uses of these funds and must be used by 2024. The staff should estimate a 2–5-year budget scenario to plan for enhanced product development activities to accomplish recommendation two above. The product fund uses should include investing in land development, speculative buildings, and infrastructure grants that will support product development for economic development purposes.

**3. Engage a consulting firm to analyze optimal locations in the County for new business park developments.**

This complements the recommendations related to product development noted in recommendations one and two above. The County needs to evaluate ideal locations where infrastructure can be developed and extended so that quality, targeted land development can occur. To do so, we recommend that the YCED engage a specialized consulting firm that will assess the optimal property locations that could be considered by the County for purchase in order to maintain control of the property. This would be done by an unbiased third party looking strictly at the costs and applicable science of the ideal locations. With the County's land use plan now being updated, this is an ideal time to sync these efforts seamlessly.

**Cost:** For advisory firm \$25K+/-.

**Next steps:** Engage a real estate market analysis firm or engineering firm to analyze site identification and the costs associated with acquisition and development.

**Timeline:** 2022-23



## Communicate the Brand



### 1. Conduct a more proactive external outreach to companies and consultants.

It's expensive to market a community domestically or globally. As such, we use the saying, *Market regionally, Sell locally*. York County should call on location advisors and companies where there are the highest concentration of advisors and companies, as identified in the target industry sectors chapter. The cluster of location advisors includes Atlanta, Chicago, Dallas/Fort Worth, Los Angeles, and the New York/New Jersey metro. This should be done in partnership with York's relationship with the Charlotte Regional Business Alliance and the SC I-77 Alliance. These outreach missions should be done no less than twice a year for both domestic and international company/consultant visitations. They should be done in tandem with the two aforementioned regional economic development marketing groups but can also be done solo, if necessary, based on York's effort to build the brand.

Because of the County's geographic location and two state dynamics, York economic development should continue to participate in the aforementioned two state regional marketing alliances: Charlotte Regional Business Alliance and the SC I-77 Alliance. But York County should review the return on investment (ROI) from each alliance on an annual basis to see if any necessary participation or funding changes may need to occur.

Finally, York County should participate in conferences of the Site Selectors Guild and other site selector targeted events. The Site Selectors Guild is the only association of the world's foremost professional site-selection consultants. Guild members provide location strategy to corporations across the globe and for every industry, sector, and function. There are two large Guild conferences a year and between two to three small summits that will allow York County to learn from and network with members of the Guild. See more about the Guild from this link: [Home - Site Selectors Guild | Site Selectors Guild](#)

### 2. Develop a stronger and more collaborative marketing effort to support common goals and messaging about York County as the place to do business.

Individually, the County, the Chamber, the City of Rock Hill, the other smaller municipalities, and the Convention and Visitors Bureau, to name a few, have individual logos, taglines, and messaging for external audiences. Since marketing is expensive, best practice research and experience suggest a successful destination/location marketing strategy is to generate a unified voice for investment or hospitality spending (tourism) in the County. To do so, all organizations should agree to have a collaborative brand, which allows them to keep their own identity, yet still offer a consistent tagline or graphic representation.



In a webinar focused on the positive influence tourism can have on traditional economic development activities, Atlas Advertising of Denver, Colorado, noted the following:

- Places leave the most lasting impressions, tangible or intangible, on human beings as individuals, whether they are deciding where a company stays or relocates or where they want to vacation.
- As information is more readily available and the competition to attract talent or visitors heightens, visitors and companies face more difficult decisions. The onset of digital and easily accessible information and data is a game-changer in how decisions are made.
- More and more, companies are seeking to locate where the workforce and talent are, and visitors tend to seek options for their next vacations based on information they glean from the internet. How a community's brand attracts and retains those audiences is the destination challenge of the next 25 years.
- With a discernible and credible brand, communities can be more successful and credible in having a real dialogue about the community's assets, differentiating factors, and authentic character.

The YCED should partner with other investment promotion agencies in the County for an overall, collaborative brand identity to be used by the County and organizations involved in economic development and tourism attraction, for both business development and tourism promotion to external audiences.

As such, these groups should engage a firm that specializes in brand development to create a collaborative brand for York County.

**Cost:** \$25,000 for brand creation (does not include collateral development or advertising)

### **3. Communicate regularly with the County Council on all things economic development.**

The YCED office should meet quarterly in an environment which will allow the economic development team to communicate effectively on matters related to economic development, and without additional layers of committees that could dilute the message. During our stakeholder engagement process, we captured comments that were not necessarily statements of fact or were a misunderstanding of the economic development process. These recommended communication sessions will allow for the policy makers (County Council), and those that implement policy (staff) to have a mutual give and take on economic development initiatives and activities.



## Execute Effectively



### **1. Enhance and update the County's incentive guidelines.**

Incentives are a tool for governments to use to induce business investment. Done effectively, incentives can show a significant ROI for a local government. Done poorly, incentives can be a waste of public taxpayer money.

The County should work to enhance its incentives guidelines so that they are effective and equitable, and reward the targeted industry sectors since they work to diversify the economy, grow tax base, and improve wages in the area. They can also be maximized to reward expansions of existing businesses that will create wealth in the County. Guidelines could also focus on incentives to support speculative buildings and land development (product development). The YCED should hold workshops with the County Council to discuss the economic development process and use of incentives.

**Timeline:** 2022

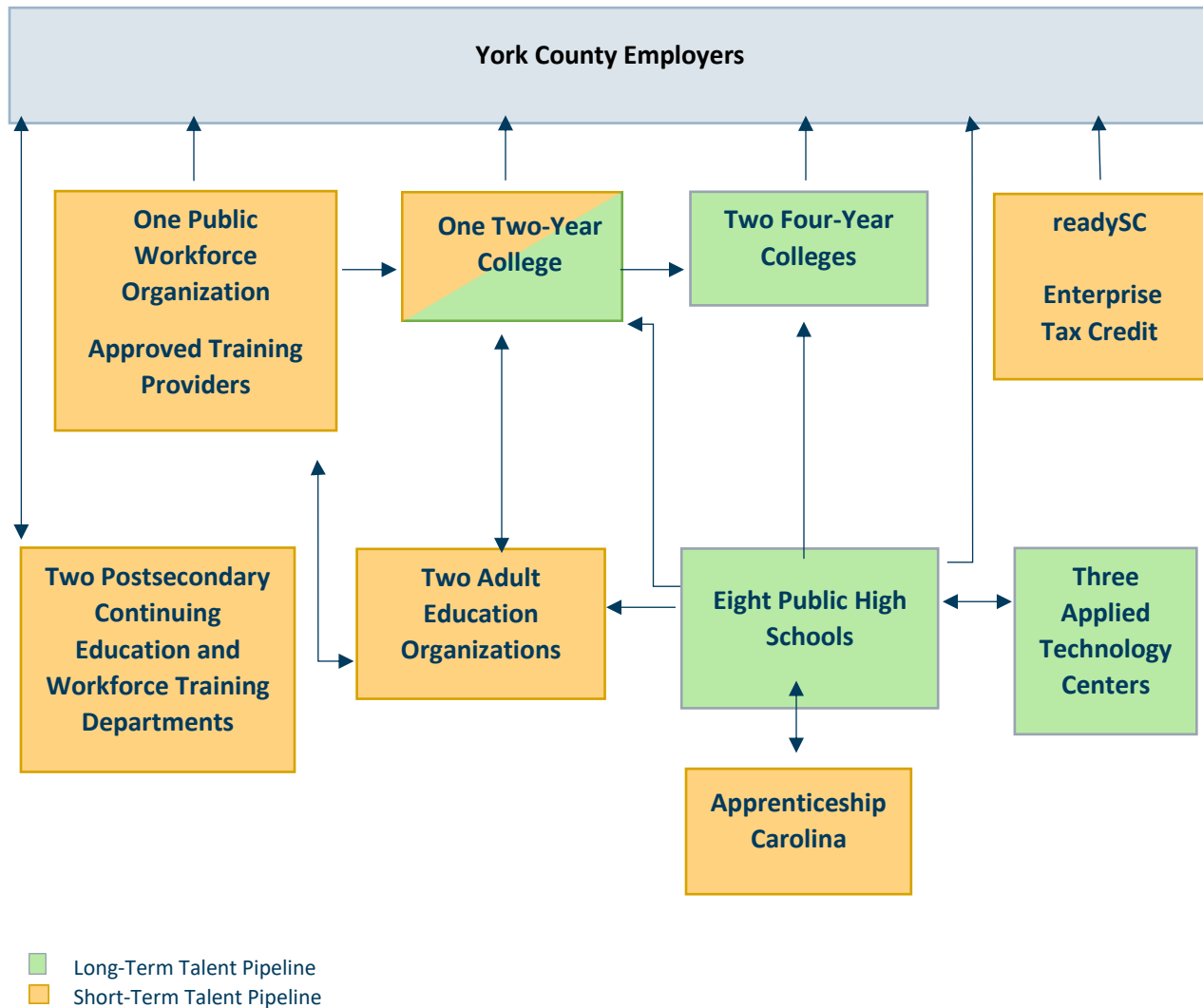
### **2. Establish a public/private workforce council to help fill the talent pipeline.**

As part of our due diligence on the workforce service delivery in York County, Garner Economics undertook a mapping process to evaluate the different players involved in workforce training in the County. Figure 3.2 documents these organizations. The full assessment of the York County workforce service delivery can be found in the [\*\*COMPETITIVE REALITIES REPORT\*\*](#).

Additionally, in the stakeholder engagement process of both focus groups with employers (the end customer) and in an eSurvey we conducted of businesses in the County, the feedback received was that more coordination and communication are needed to effectively execute the workforce service delivery system. Feedback from many was that the workforce group(s) that were used for either training, or finding talent, or both—whether it was a community college, technical school, readySC, or a four-year college, was mostly effective. Getting to the point of finding the right entity or conduit to help businesses was the issue.

This new workforce council will bring workforce partners together with representatives from the business community in order to coordinate and maximize communication and workforce development programming. This new initiative may require a new talent development coordinator within the YCED or some other support partner, (e.g., Chamber of Commerce) to provide organizational programming and support.

**Figure 3.2 York County Workforce Development Delivery System Flowchart**



**Timeline:** 2022-23

**Best practice example(s):**

[Cobb Workforce Partnership | Cobb Chamber of Commerce | Marietta, GA](#)

[Attract and Retain Talent in DSM USA \(dsmpartnership.com\)](#)

### **3. Conduct economic and community development leadership learning labs in other inspirational communities (community visits).**

A community visit or learning lab is a trip to another city/county or region taken by a diverse delegation of leaders from a community's public, private, and nonprofit sectors to learn about broad issues related to economic development. These visits are typically led and facilitated by a community's chamber of commerce. In this case, we are suggesting the YCED lead the first and include the appropriate partners that can help facilitate economic growth in the county, e.g., County Council, Growth Partners.

With community visitation, the visiting delegation discusses challenges and opportunities its community is facing with leaders of the host community. The visit provides an opportunity for interaction among local leaders and facilitates exchange of best practices and lessons learned between the two areas. These visits are often organized annually, serving as a regularly scheduled opportunity for collective community visioning. In the case of York County, a number of stakeholder engagement participants mentioned how helpful it would be if County Council leaders, educators, and the business community could travel and learn together about what has worked well in other inspirational or aspirational communities.

**Timeline:** 2022-2023

**Best practice example:** [InterCity Visits - ChamberRVA](#)

### **4. Supplement the YCED budget by \$100,000 annually to support marketing, product development, and related items in this report to implement this strategic action plan.**

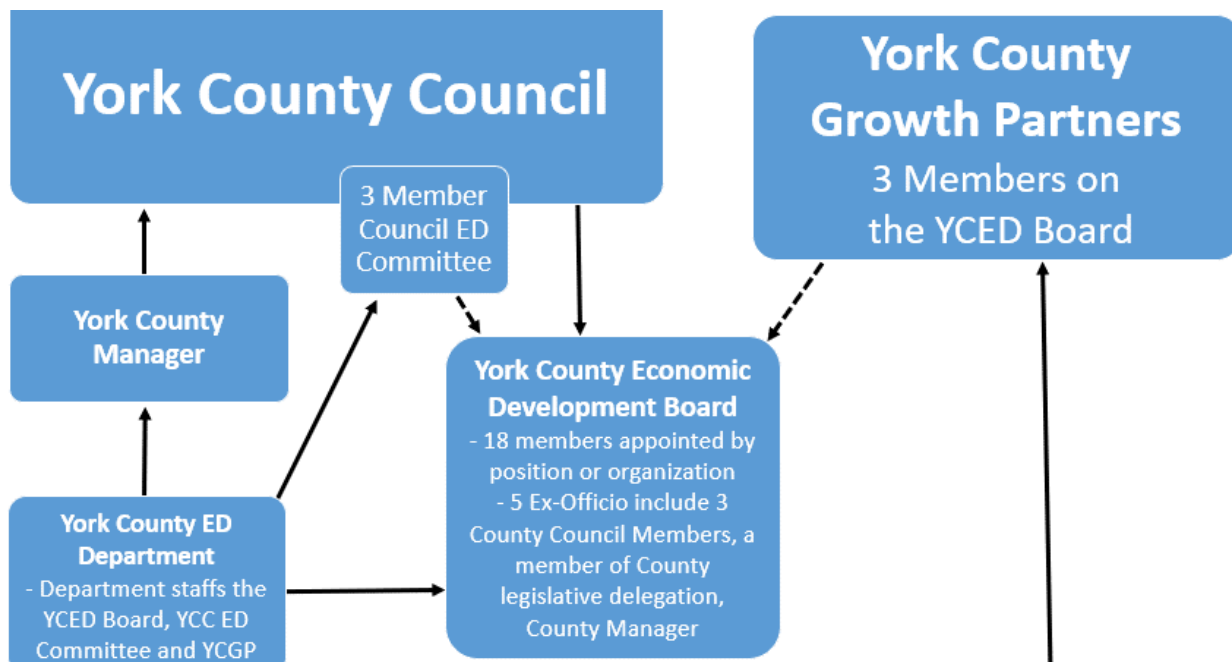
The YCED has a 2021 budget of \$913,000. This is composed of \$808,000 from the County and \$105,000 from York County Growth Partners, a private sector group used to supplement the County's economic development budget. On the surface, it would seem that an overall organizational budget for economic development at \$913K is generous and well-funded. But this budget includes six full time staff and a significant amount of overhead related to the successful operations of the department. The program budget related to marketing and promotion totals \$68,000, which is low if policymakers desire the YCED to be a more proactive business development organization rather than a successfully well-managed reactive organization. The current arrangement between York County Growth Partners and the County is for the private sector (Growth Partners) to fund a significant share of the marketing efforts. A more effective, proactive budget would equate to an additional \$100,000 annually. This would allow the YCED to accomplish these tasks we outlined in the **Communicate** section of these recommendations, effectively and proactively.

### **5. Modify the governance structure of the YCED with an oversight board appointed by the County Council and York County Growth Partners.**

The YCED is a public agency of the County and receives public tax money as part of its operations (\$808,000). The director of economic development reports to the county manager, who reports to the County Council. But because the YCED accepts more than \$100,000 a year from the private sector to supplement its budget, there is a necessity to have a governing board that represents both the public and private sectors. If no private money was received by the YCED, there would be no need to have any kind of oversight board since the county manager and ultimately the County Council have that responsibility.

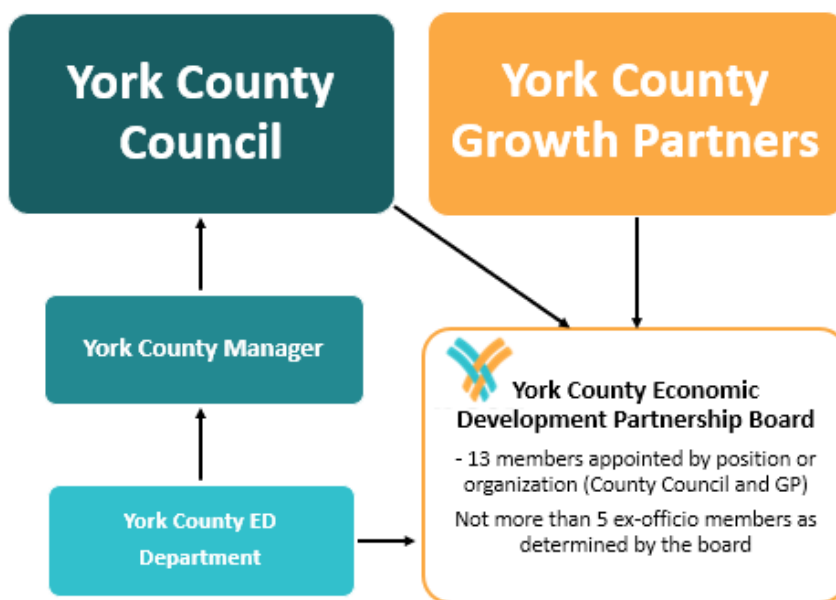
The current governance structure noted in Figure 3.3, shows some organization layers that make its governance structure potentially cumbersome (per feedback from our stakeholder interviews).

**Figure 3.3 York County Existing Governance Structure**



The current the YCED Board currently has 18 members, along with five ex-officio members for a total of 23 voting and nonvoting members. From our analysis of the above, and in interviewing staff and board members, we believe a more streamlined approach will allow for a more efficient and effective governance structure (Figure 3.4 below).

**Figure 3.4 Proposed York County Governance Structure**



Proposed 2021

This new approach shows a governing board with 13 appointed members: seven from the County Council and six from Growth Partners. As long as the County continues to invest more dollars into the budget than the private sector, then the chair of the Partnership Board will automatically be a County Council member elected by the Partnership Board. This board should meet quarterly, but no more than every other month. It is recommended that each County Council member serve in their own designated appointment capacity. However, if that is not desired, then at the very least, the three members of the County Council economic development and planning committee should automatically be three of the seven. For the remaining four slots (if the County Council members do not serve), then the Council should appoint business leaders who can positively contribute to the board. Growth Partners will have six members, appointed from its participating corporate membership of contributors. You must be a contributor of Growth Partners to serve on the board. Ex-officio members should include academia appointments, such as the presidents of the various local academic institutions in the County, that help fill the talent pipeline.




This board serves in an oversight capacity of the YCED and will have budget review and oversight, economic program review, community strategic initiatives, etc. A new set of by laws will need to be developed to officially constitute this new board. The above removes the three-member council ED committee, since all council members have the ability to serve on this new Partnership Board rather than appoint a proxy. The new Partnership board will make final recommendations to the County Council on annual budget requests, and to the Growth Partners board related to private sector annual contributions.

**Best practice example(s) for public dominated funding with some private sector funding:**

Round Rock Chamber and Economic Development Corporation, Round Rock, TX

Wilmington (NC) Business Development

## Recommendations Summary

Strategy	Actions	Timing	Estimated Cost
Asset Development	<i>Product improvement initiatives to ensure York can compete to attract, retain, and grow the types of companies and talent the community desires</i>		
	1. Create an infrastructure, land use, and funding plan to provide water and sewer to targeted areas of the County.	2022-23	NA
	2. Develop a collaborative product development plan with public and private stakeholders.	2022-23	NA
	a. Develop a more specific plan for the County EDF and the American Rescue Plan to supplement product development.	2022	
	3. Engage a consulting firm to analyze optimal locations in the County for new business park developments.	2022-23	For advisory firm \$25K+/-
Communicate the Brand	<i>Product improvement initiatives to ensure York can compete to attract, retain, and grow the types of companies and talent the community desires</i>		
	1. Conduct a more proactive external outreach to companies and consultants.	2023-2028	\$15,000 annually
	2. Develop a stronger and more collaborative marketing effort to support common goals and messaging about York County as the place to do business.	2023	\$25,000
Execute Effectively	<i>Organizational adjustments that allow the County to work proactively in those areas that will directly impact the economic growth the community desires</i>		
	1. Enhance and update the County's incentive guidelines.	2023	NA
	2. Establish a public/private workforce council to help fill the talent pipeline.	2023-2024	NA
	3. Conduct economic and community development leadership learning labs in other inspirational communities (community visits).	2023-2028	\$5,000 for YCED participation
	4. Supplement the YCED budget by \$100,000 annually to support marketing, product development, and related items in this report to implement this strategic action plan.	2023	\$100K to fund new initiatives & marketing
	5. Modify the governance structure of the YCED with an oversight board appointed by the County Council and York County Growth Partners.	2023	NA



## Chapter 4: What's Next?

York County is experiencing phenomenal economic success, but can it be sustained? The County is running out of site-ready product because of the lack of countywide water and sewer infrastructure, which means fewer shovel-ready sites and quality speculative or vacant buildings. But effective County leadership is working diligently to turn the tide to enhance the County's infrastructure. The key questions that policymakers must ask are: What must be done to always stay globally competitive in our ability to attract and retain investment? What must we do to invest in ourselves so we will never become complacent? How can we be an effective alternative to the higher cost of the Charlotte market?



A key start to this will be the recommended targets that also allow for the diversification and income growth of the local economy. Additionally, local leaders will need to work diligently to enhance and grow the area's real estate portfolio. For without the opportunity to grow its office, industrial, and commercial base, York County, like any other County, would eventually wither. No Product, No Project.™

Through this report, *York County Future: A Bold, High-Performing Action Plan Designed to Achieve Success*, community leaders can make long-term structural investments to ensure that the County can attract the types of activity it wants while also taking on game-changing initiatives to augment the area's quality of place assets.

### Thank You!

Garner Economics would like to thank the YCED and the more than 212 people who participated in our stakeholder engagement during this process. Their feedback, compilation of data, and information, as well as their openness and willingness to explore various opportunities to strengthen operations, have contributed to the richness and rigor of this report. And a very special thanks to the staff of the County—true professionals—for their guidance and support in this action plan.

Thank you to the Steering Committee which guided the efforts of the strategic planning process:

Christi Cox County Council Member Hamilton Martens Law Firm	Paul Basha Past Chair, YCGP President & CEO, York Electric Cooperative	Dave Oxedine Operations/Business Development Manager Redline Chemical
Joel Hamilton County Council Member Schiller & Hamilton Law Firm	Greg Austin Senior Vice President Comporium	Amy Massey Traffic-Transportation Engineer Kimley Horn
Robert Winkler County Council Member Edward Jones Investments	Greg Rutherford President York Technical College	David Hudspeth County Manager York County
Jimmy Sprouse Chair, YC Growth Partners President & CEO, York County Natural Gas Authority	Jim Bradford City Council Member Town of York	David Swenson ED Director York County