



2022 COVID Impact Update

York County Economic Alliance

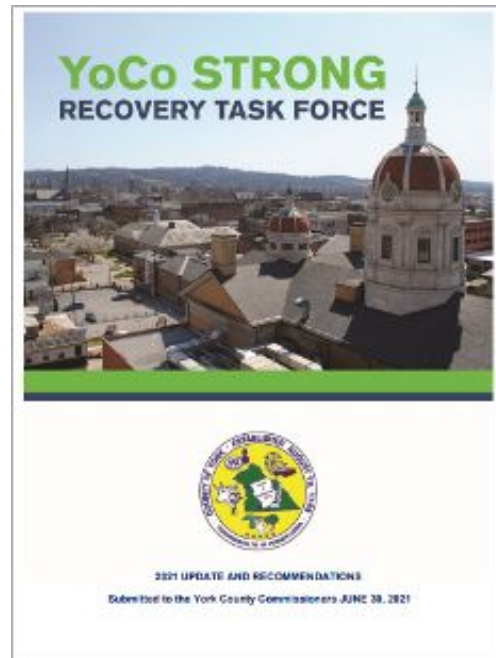
A Partnership to Understand Impacts

The York County Economic Alliance began working with Fourth Economy in late 2019 with the goal of producing an Economic Action Plan to guide strategic investments to enhance the economy and community. And then....

- **We pivoted in April 2020** to begin to assess the impact from the COVID-19 pandemic, and project what may be on the horizon if conditions did not improve. This information supported community leaders as they looked for advise on where to invest and mitigate impacts.
- In **May 2021**, we updated and added data, refreshed the analysis, and briefed community leaders again to promote understanding of what has transpired and potential longer-term impacts.
- In **May 2022**, as ongoing impacts continued, we set to work on updating the information and producing a community briefing.

York County Recovery

- In 2020 and 2021, the County Commissioners empowered the YoCo Strong Recovery Task Force to make recommendations on how to respond and recover from the pandemic.
- Ultimately, the Task Force and data from Fourth Economy helped guide the allocation of \$132 million in federal CARES and ARPA funds to a variety of pandemic needs, including allocations to the arts and cultural sector, workforce development providers, and front-line social service community.
- One of the key recommendations was providing direct support to restart and retain small businesses and non-profits, with prioritization of minority-owned businesses and impacted industries.
- 2020-2021: \$29.9 million in CARES, ARPA and CHIRP grants to small businesses and non-profits



York County Recovery

YoCo STRONG RESTART FUND

YoCo CHIRP (COVID-19 HOSPITALITY
INDUSTRY RECOVERY PROGRAM)

\$29.9 MILLION DISBURSED

1,917 TOTAL
RECIPIENTS

Awarded to
173
NONPROFITS

Awarded to
1,744
SMALL BUSINESSES

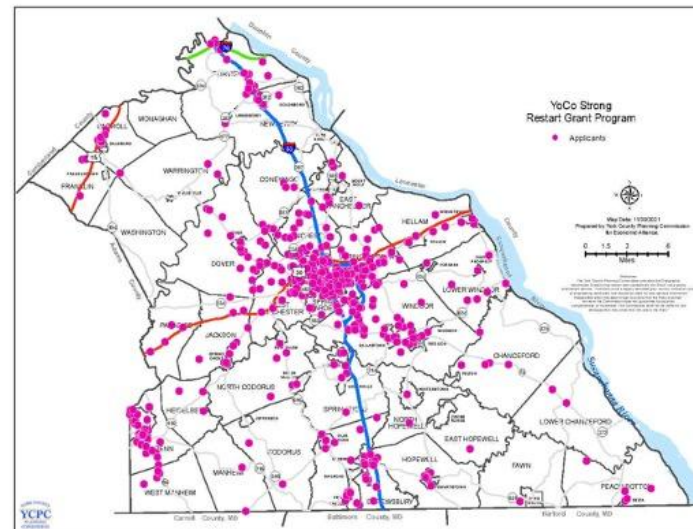
Average grant amount: **\$15,600**

34% of the businesses owned
by Persons of Color.

38% of the businesses owned
by Women.

7% of the businesses owned
by Veterans.

By The
Numbers
2021-2022



York County Recovery

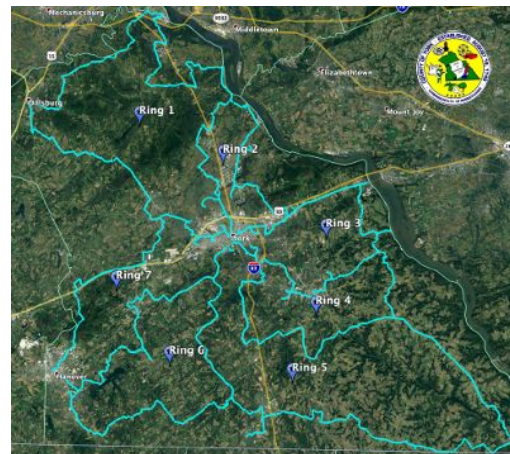
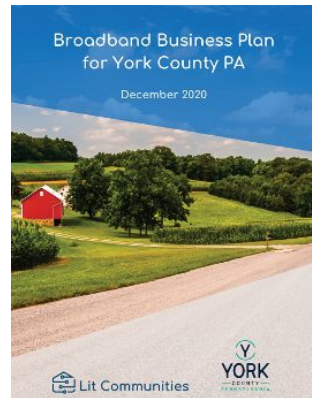
The Commissioners created the YoCo Fiber Broadband Task Force and allocated \$26.5 million for broadband expansion.

\$1.5 million CARES allocation for:

- Completion of a countywide broadband plan
- Construction of a 16 mile fiber pilot project under the Heritage Rail Trail

\$25 million ARPA allocation for:

- Construction of 144 miles / three priority rings of the YoCo Fiber middle mile network
- Deployment of urban wireless networks in the York and Hanover metros



York County Recovery

In April 2022, YCEA launched the **BLOOM Business Empowerment Center** to address disparities in York County's rate of women- and minority-owned businesses.

To date, BLOOM has:

- Awarded **\$314,000** in grants to small businesses and entrepreneurs
- raised **\$1.7 million** in private capital for grants and loans
- Advanced through **80%** of the federal CDFI designation process
- Preparing to close on our **first BLOOM loan**



THE OPPORTUNITY	THE INVESTMENT	THE 5-YEAR OUTPUT	THE 5-YEAR OUTCOME
York County lags the state and national average in total number of minority-owned businesses.	\$6.25 million in support over 5 years invested in:		
	BLOOM Loans	BLOOM Loans	
	\$500K per year	\$3M to 100 businesses (Avg. loan \$30,000) 80% loaned to women and persons of color	York County meets or exceeds the state and national average by creating and retaining at least 38 minority-owned businesses per year, or 190 new minority-owned businesses total
York County lags the state and national average in total number of women-owned businesses.	BLOOM Grants	BLOOM Grants	
	\$100K per year	\$500K to 300 businesses (Avg. grant \$1,500)	York County closes the gap between the state and national average by 50% by creating at least 54 women-owned businesses per year, or 270 new women-owned businesses total
York County's business birth rate is lower than the state average.	BLOOM Fellowships	BLOOM Fellowships	
	\$30K per year	\$150K to 15 Fellows (Avg. \$10,000)	
	BLOOM Courses	BLOOM Courses	
		400 graduates	
	WBCO	WBCO	
		600 participants	
	Other EAP Initiatives	Other EAP Initiatives	York County exceeds the state average by matching and then maintaining a business birth rate of at least 677 per year-or \$1 additional businesses than the current annual benchmark

People

People

In This Section

- Jobs, Wages, Industries
- ALICE Households
- Living Wage
- Social Service Needs
- Housing Impacts
- Unemployment & Labor Force Participation
- Childcare

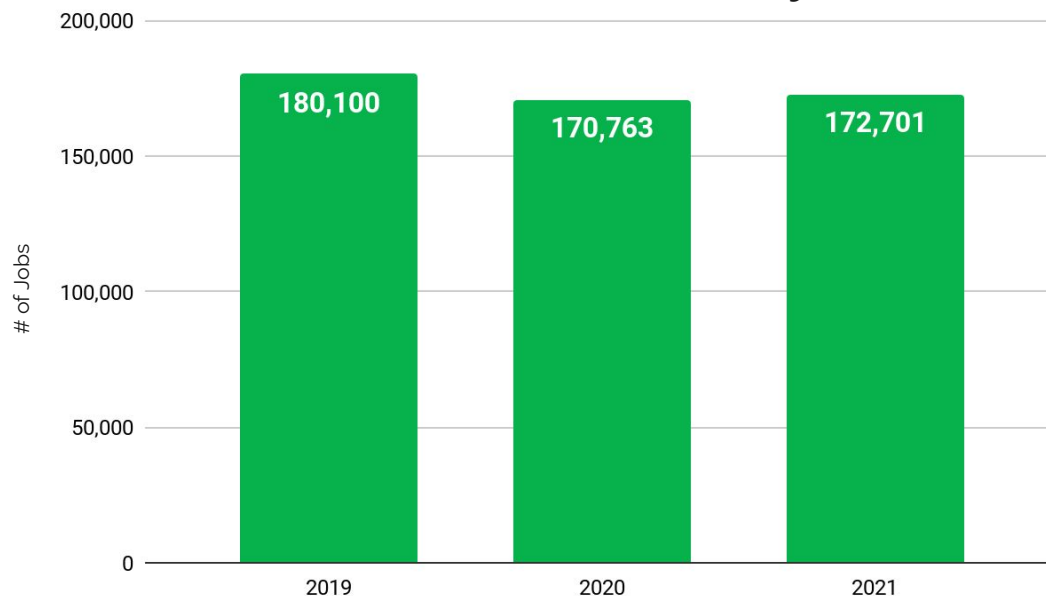
Changes in Total Jobs in York County

Total number of jobs have not returned to pre-pandemic levels

Jobs **decreased 5.2%** from 2019 to 2020 and **increased 1.1%** from 2020 to 2021.

The balance is that there are **7,399 fewer jobs at the end of 2021** than 2019.

Total Jobs - York County

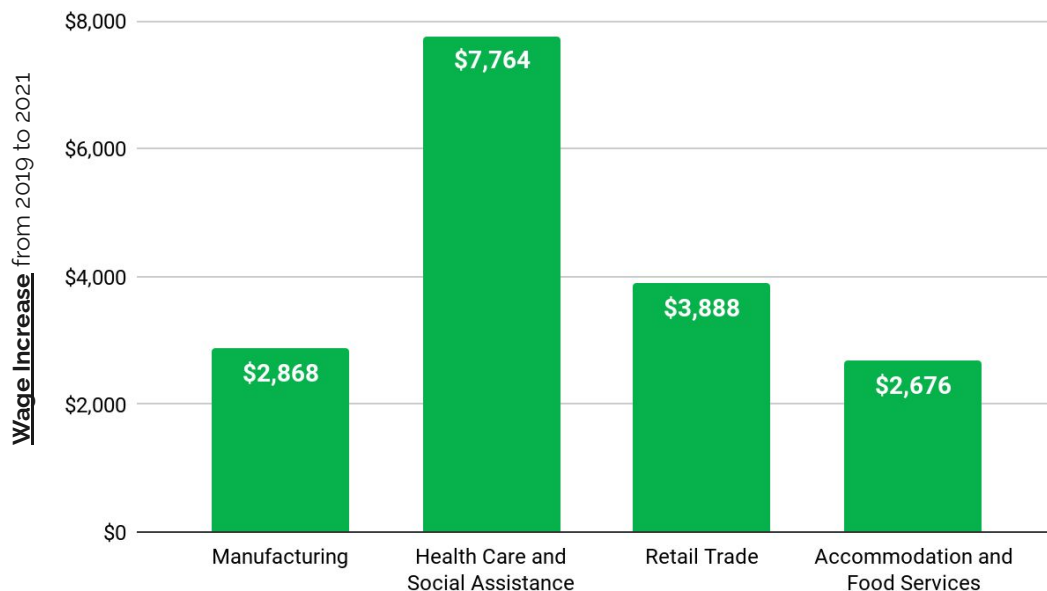


Wage Increases - York County

The industries with the most employees in York County saw an increase in wages compared to before the pandemic

Wages of frontline workers (Manufacturing, Health Care/Social Assistance) **increased 13%** since 2019.

The pay of low-wage workers (Retail Trade Accomodations/Food Services) **increased 14%**.

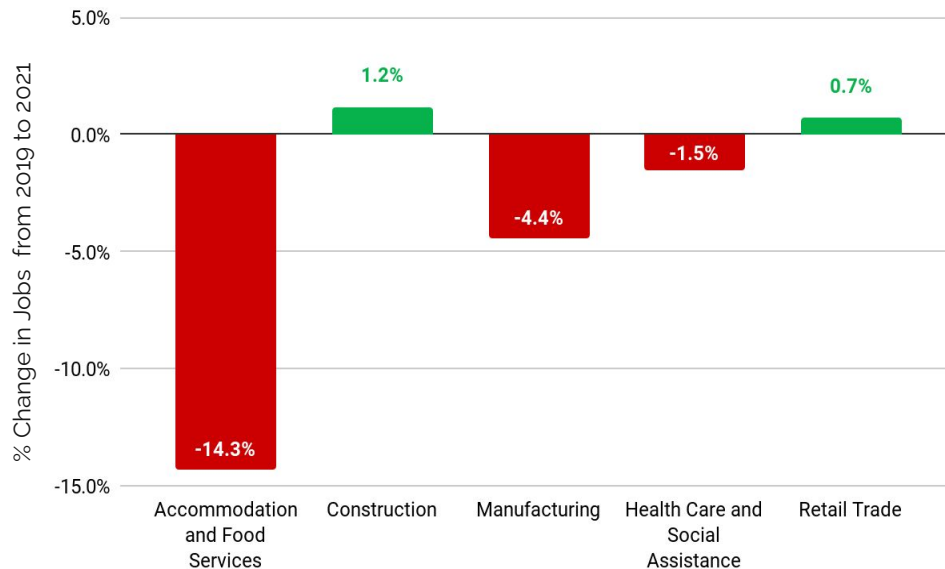


Job Loss - Most Employed Industries - York County

From Q2 2019 to Q2 2021, York County experienced mostly decline in jobs for the top 5 largest industries by employment.

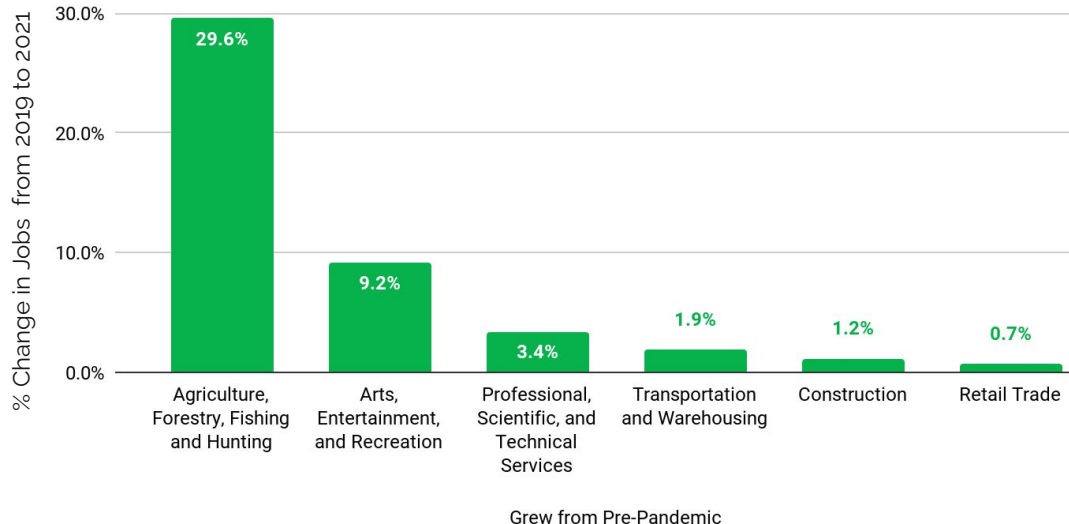
	Average Yearly Wage	Jobs Lost/Gained
Manufacturing	\$64,032	-1,434
Health Care and Social Assistance	\$65,964	-419
Retail Trade	\$36,936	139
Accommodation and Food Services	\$20,796	-2,036
Construction	\$69,876	133

These five industries hold **59% of the jobs in York County.**



Industry Job Growth - York County

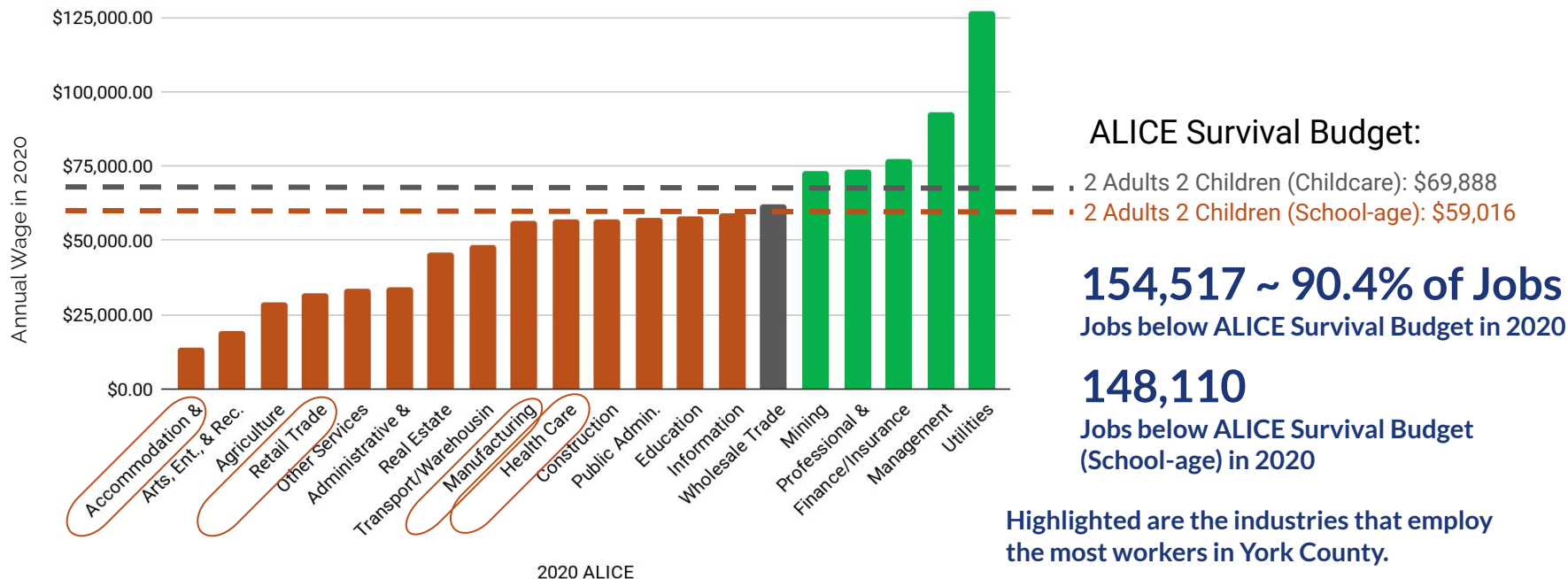
Very few industries experienced growth since 2019, and those that did grew only slightly. Overall, job losses outweigh the gains in York County.



Industry	Average Yearly Wage	Jobs Added
Agriculture, Forestry, Fishing and Hunting	\$30,468	138
Arts, Entertainment, and Recreation	\$25,056	175
Professional, Scientific, and Technical Services	\$80,892	238
Transportation and Warehousing	\$52,572	202
Construction	\$69,876	133
Retail Trade	\$36,936	139

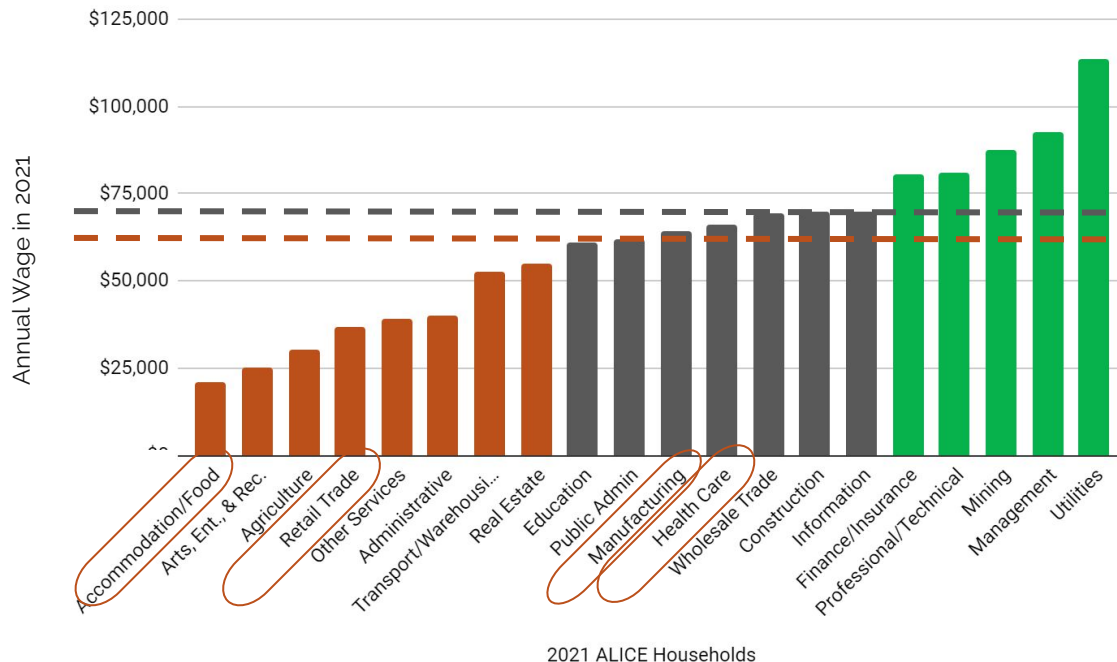
How are ALICE Households Impacted in York County?

2020



How are ALICE Households Impacted in York County?

2021



155,073 ~ 89.8% of Jobs
Jobs below ALICE Survival Budget in 2021

ALICE Survival Budget:

- 2 Adults 2 Children (Childcare): \$69,888
- 2 Adults 2 Children (School-age): \$59,016

63,813
Jobs below ALICE Survival Budget
(School-age) in 2020

91,260
Jobs between ALICE Survival
Budget (Childcare and School-age)
in 2020

Living Wage - York County

National Inflation is up 8.6% since May 2021. Wages that didn't grow by 8.6% are most affected by inflation.

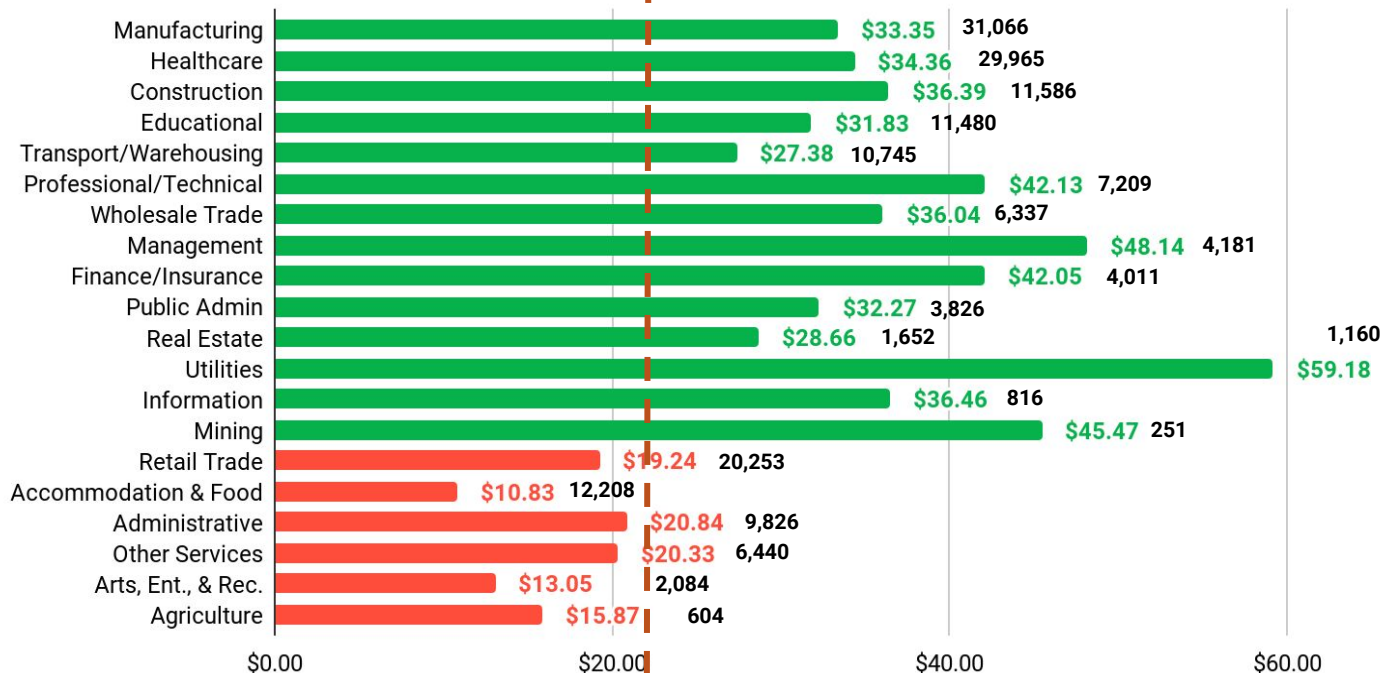
Quarterly Average Wage by Industry, 2021, York County

\$93,475

is the living wage **for a family of 4** (two adults working and two children) in York County.

This equates to:

\$22.47 hourly
wage per
individual

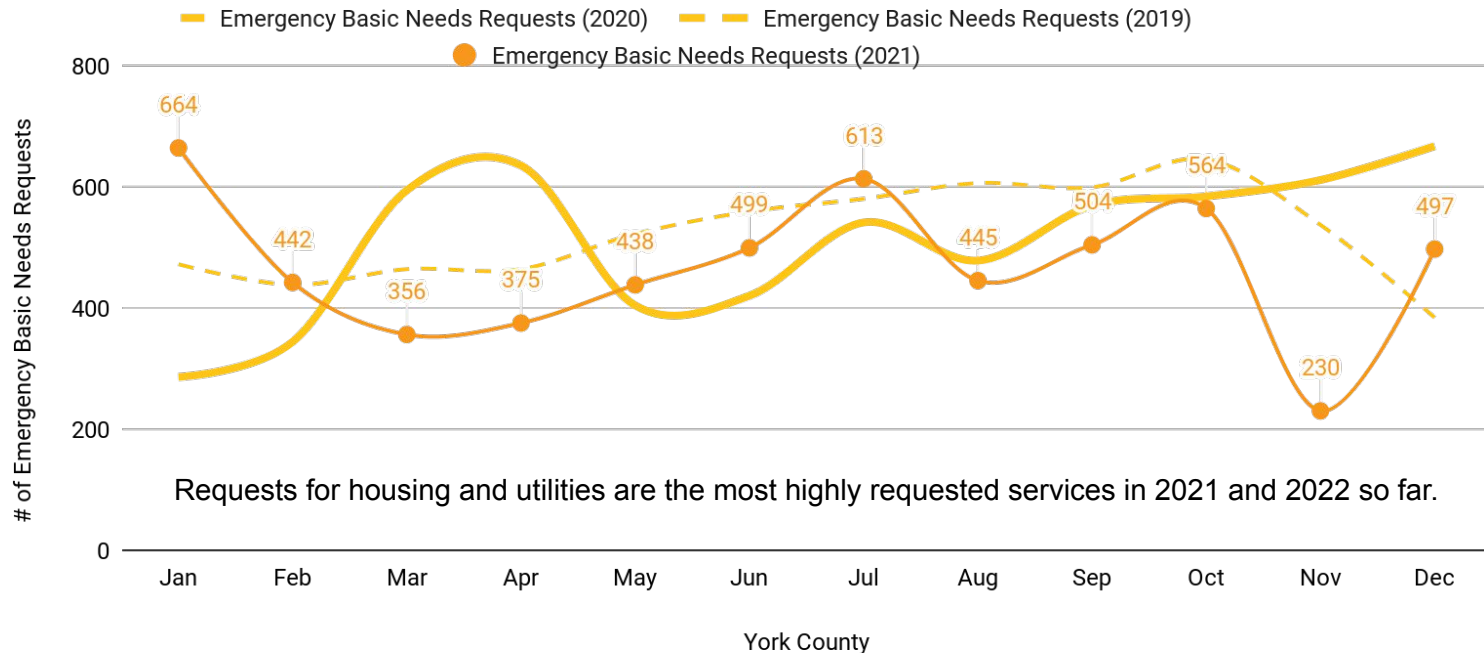


*Bold number is total employed

\$22.47 (Living Wage)

211 Emergency Basic Needs Requests

York County



Emergency basic needs requests to 211 in York County peaked in January and July of 2021, and experienced another steep increase at the end of the year.

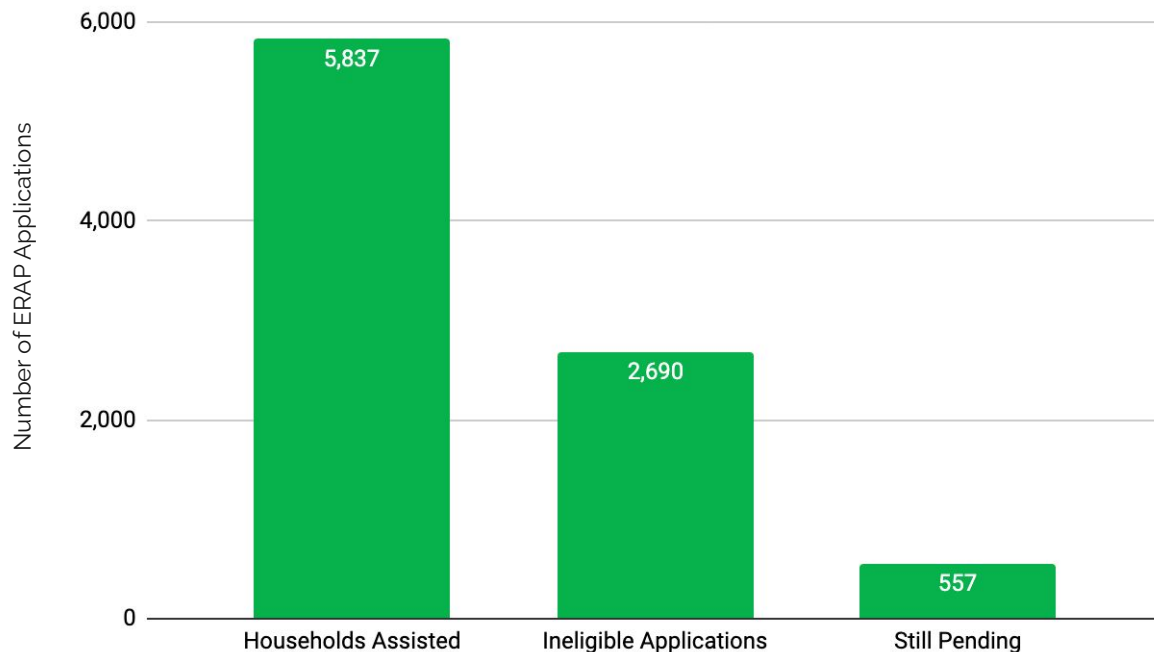
Requests were 19% lower in January 2022 than January 2021.

The county started disbursing emergency rental assistance program funds in September of 2021 that could be related to the drop in requests from Oct to Nov.

What has the pandemic's impact been on back rent and mortgage payments?

Emergency Rental Assistance Program (ERAP)

York County



As of July 2022*, throughout York County:

9,084

Households Applied for Rental Assistance

Households that needed help for past due rent or upcoming rent and utilities, or rehousing costs.

5,837

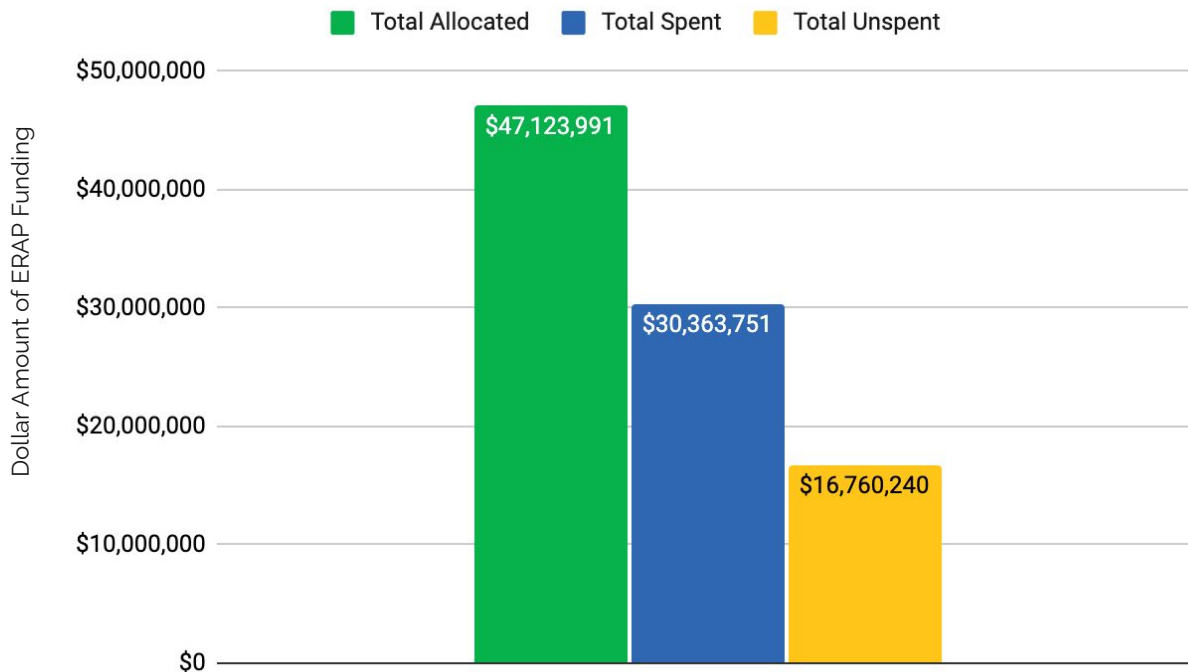
Households received Rental Assistance

Needed rental assistance due to COVID-19 and economic insecurity.

*Note: Money appropriated September 2021; ERAP 1 funds may be spent through Sep 2022; ERAP 2 funds may be spent through Sep 2025

Emergency Rental Assistance Program (ERAP)

York County



York County spent almost \$30.4 million on rental assistance.

\$47,123,991

Total Amount Received from State and Federal

\$16,760,240

Amount Unspent from State and Federal

Renters behind on payments

Are residents currently caught up on rental payments?

4,785

2020

Estimated number of York County Renter Households behind in payments based on statewide numbers.

As of May 11, 2020, 10.9% of renter households statewide were behind on their payments.

3,995

2021

Estimated number of York County Renter Households behind in payments.

As of April 26, 2021, 9.1% of renter households statewide were behind on their payments.

5,312

2022

Estimated number of York County Renter Households behind in payments.

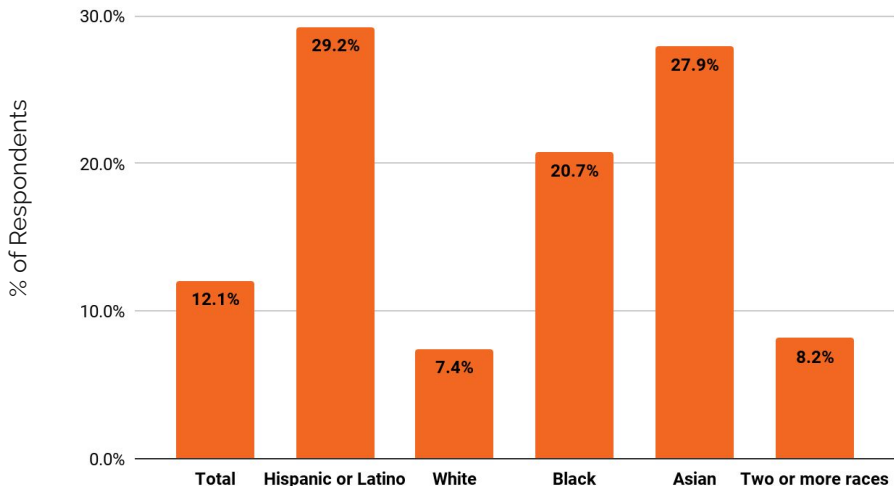
As of April 11, 2022, 12.1% of renter households statewide were behind on their payments.

Disparities across households in PA

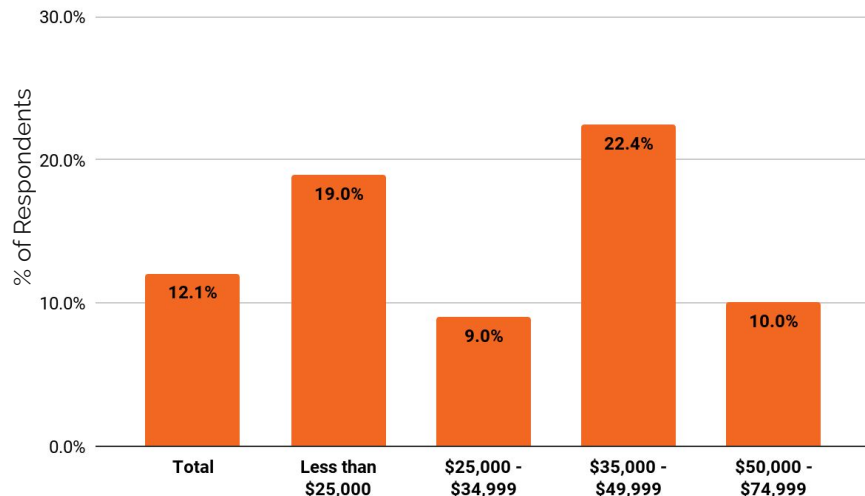
Are residents currently caught up on rental payment?

Total Surveyed: 215,111
 White: 31,351 Hispanic/Latino: 5,854
 Black: 5,272 Two or more races: 1,762
 Asian: 828

Rental Payment by Race & Ethnicity:
 % of Respondents Not Caught up, Missed or Delayed Payment



Rental Payment by Household Income:
 % of Respondents Not Caught up, Missed or Delayed Payment



Hispanic, Black, and Asian Households are more likely to be behind on rent

Owners behind on payments

In the past month, did you miss or delay payment on your mortgage?

10,708

2020

Estimated number of York County Owner Households behind in mortgage payments based on statewide numbers.

As of May 5, 2020, 8.2% of owner households statewide were behind on their payments.

5,613

2021

Estimated number of York County Owner Households behind in mortgage payments.

As of April 26, 2021, 4.3% of owner households statewide were behind on their payments.

4,438

2022

Estimated number of York County Owner Households behind in payments.

As of April 11, 2022, 3.4% of owner households statewide were behind on their payments.

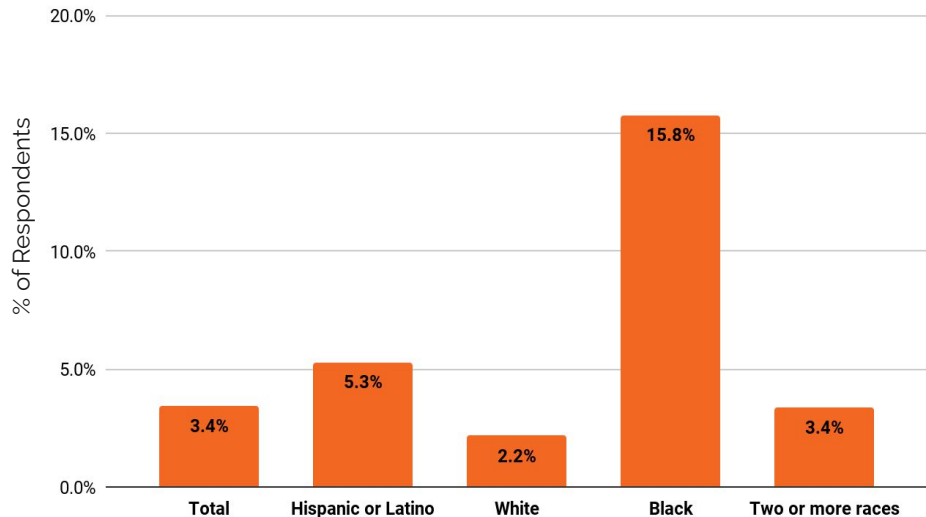
Disparities across households in PA

In the past month, did you miss or delay payment on your mortgage?

Total Surveyed: 201,045
White: 120,463
Black: 3,803
Asian: 0
Hispanic/Latino: 20,256
Two or more: 2,373

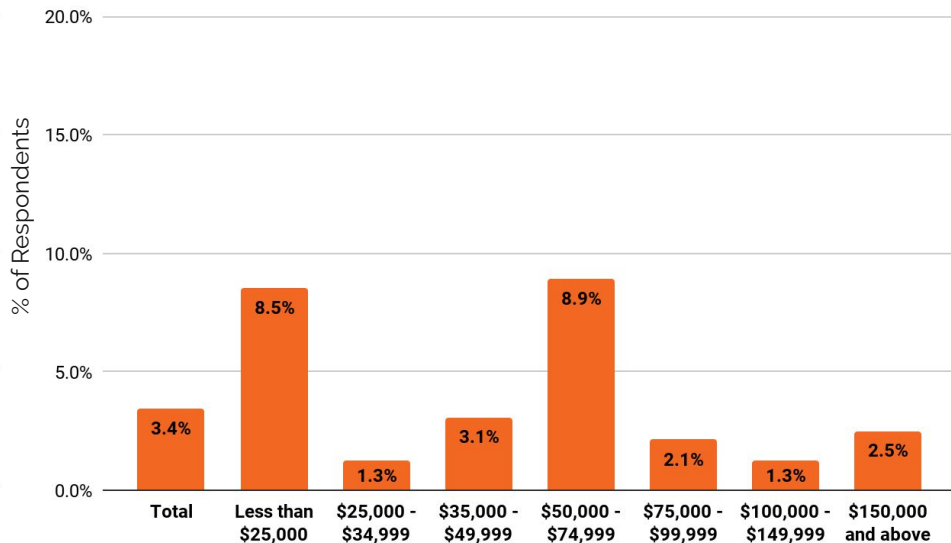
Mortgage Payment by Race & Ethnicity:

% of Respondents Not Caught up, Missed or Delayed Payment



Mortgage Payment by Household Income:

% of Respondents Not Caught up, Missed or Delayed Payment



Median Home Listing Price 2019-2022



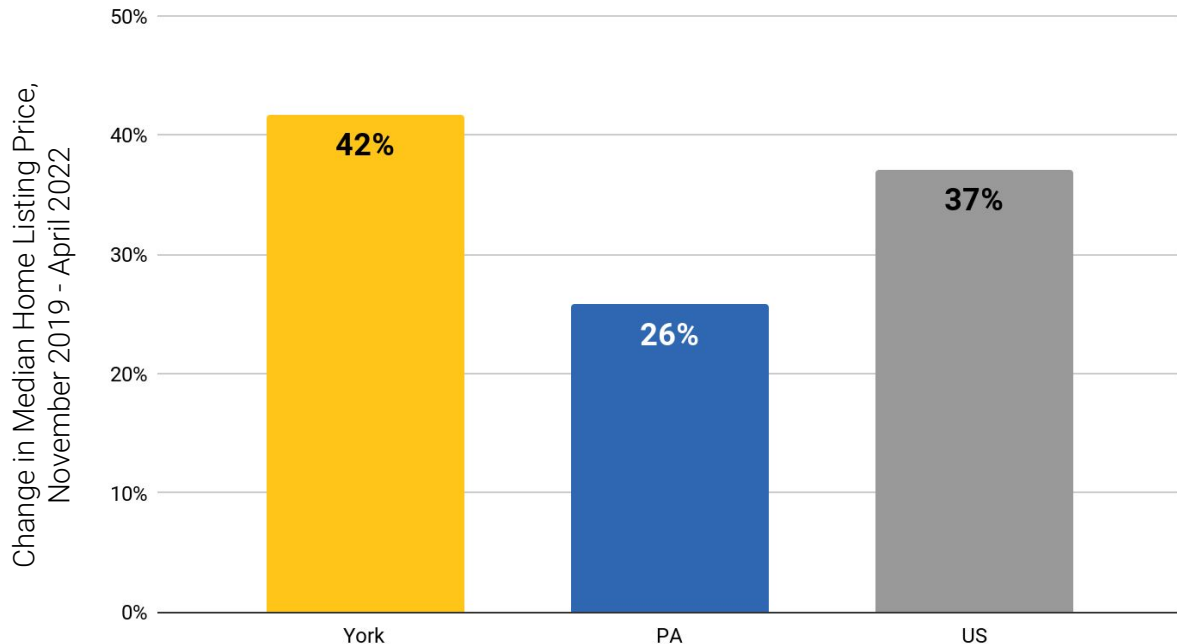
York
County



PA



US



16%

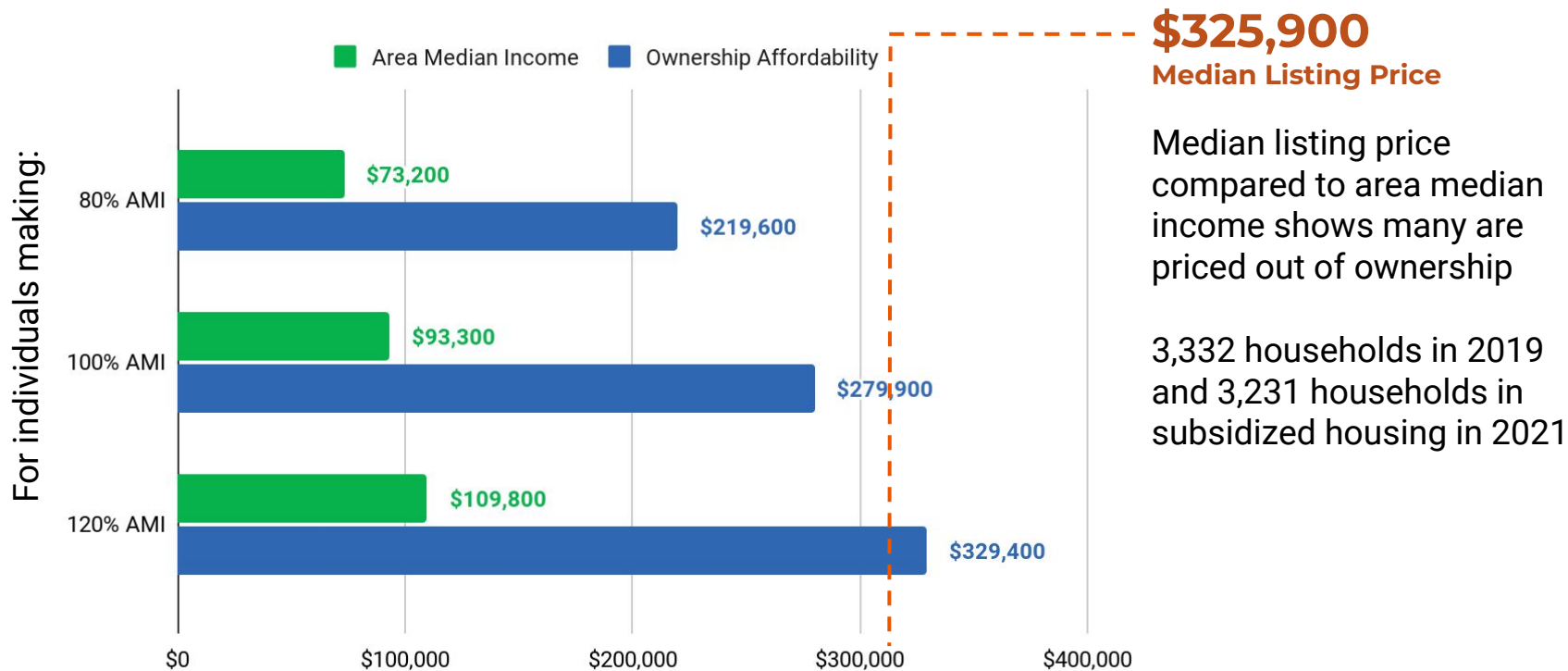
Difference between Median Home Listing
Prices Statewide

\$325,900

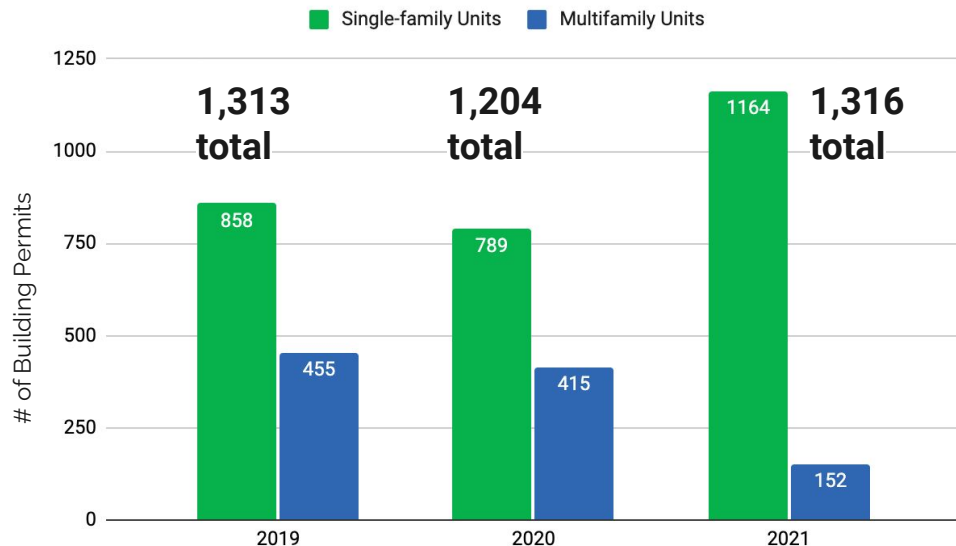
Current Median Home Listing Price
Up 42% from pre-pandemic prices

York County median home
listing prices have increased
significantly higher than
throughout Pennsylvania.

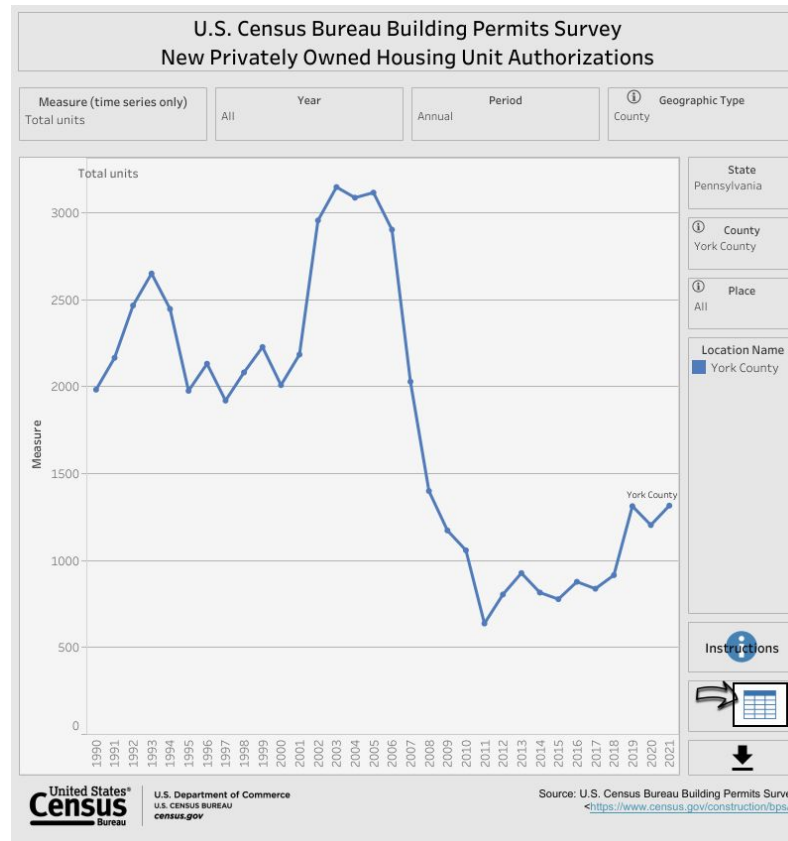
Home Ownership Affordability in York County



Housing Building Permits - York County



Source: Census Building Permit Survey



How has COVID-19 impacted the region's workforce?

Unemployment Rate

Unemployment rates have been lower in York County than the state.



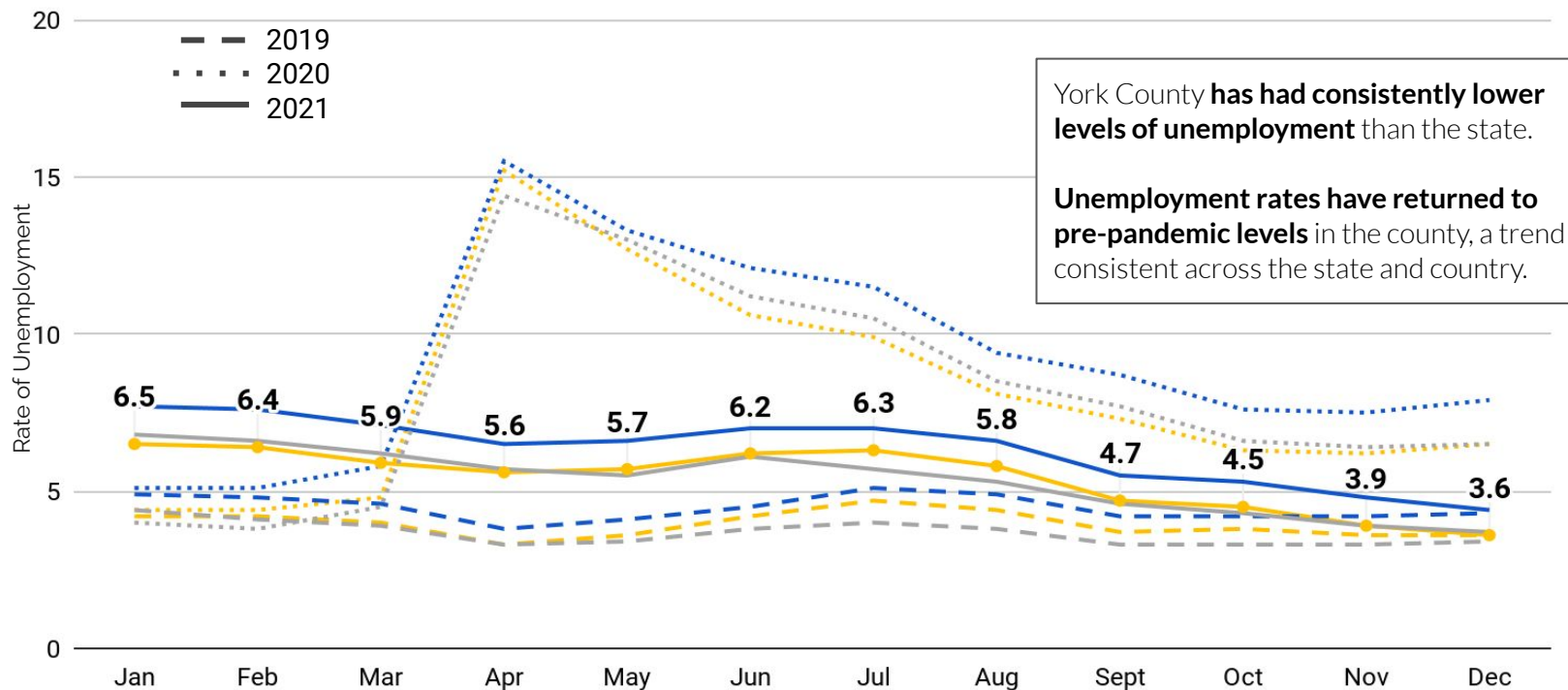
York
County



PA



US



Labor Force Changes

From December 2020 to December 2021, York County experienced a decline in the labor force while the nation saw a moderate increase.



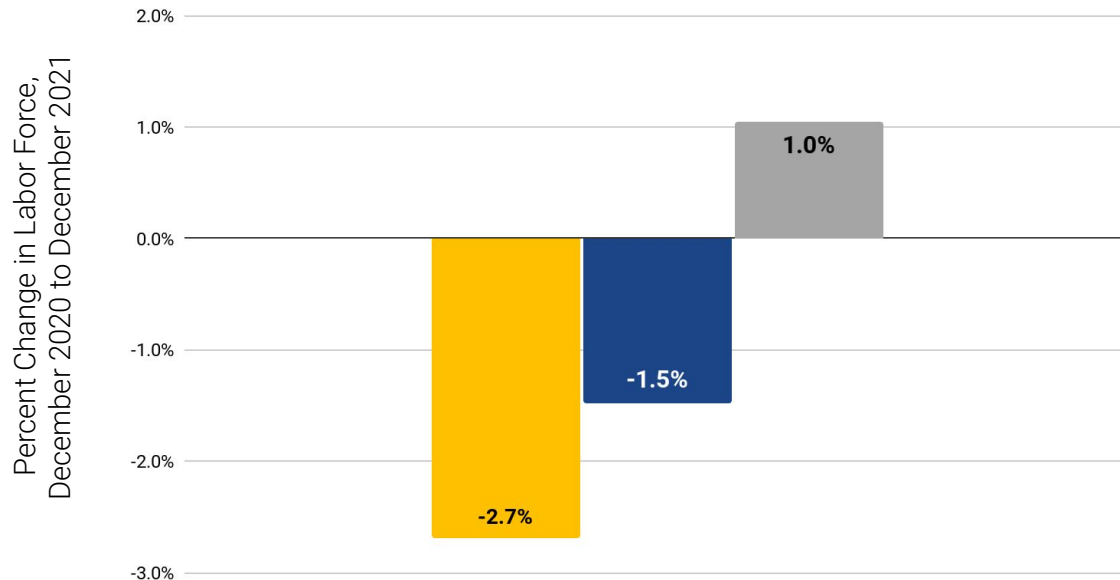
York
County



PA

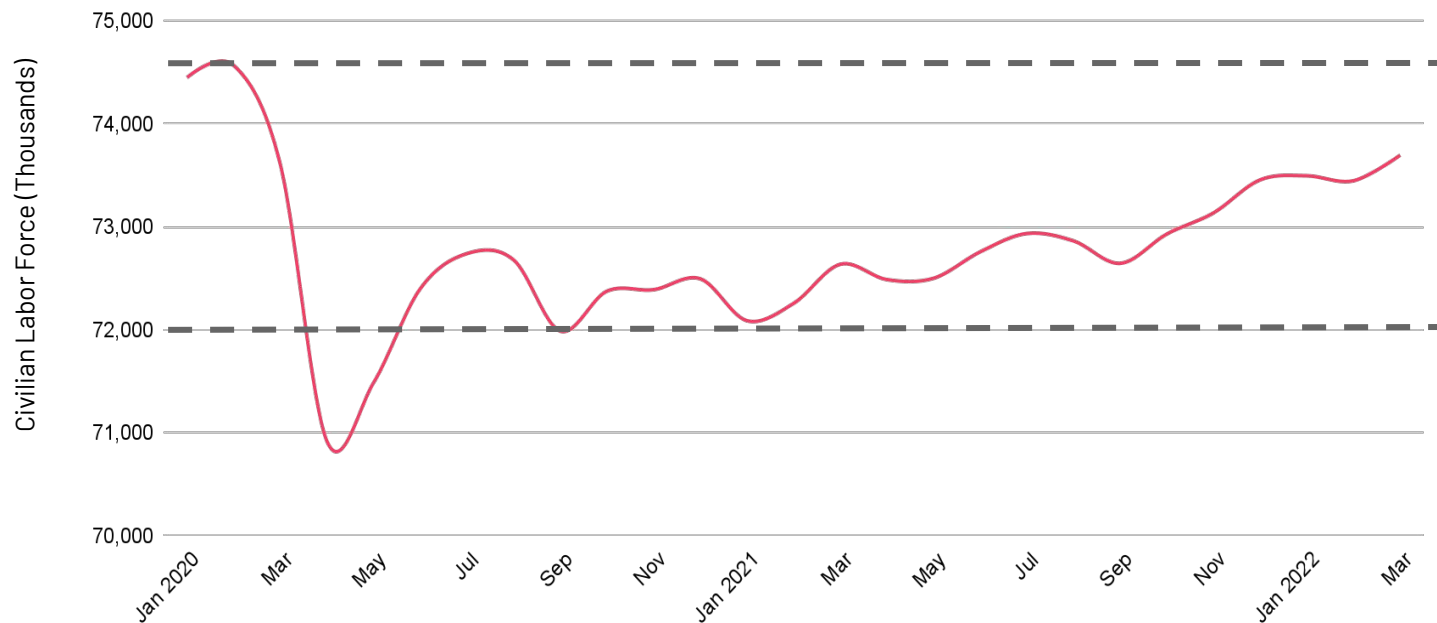


US



The labor force in York County **declined 2.7%** between December 2020 and December 2021, with **6,400 people exiting the workforce.**

Women's Labor Force Participation, Nationally

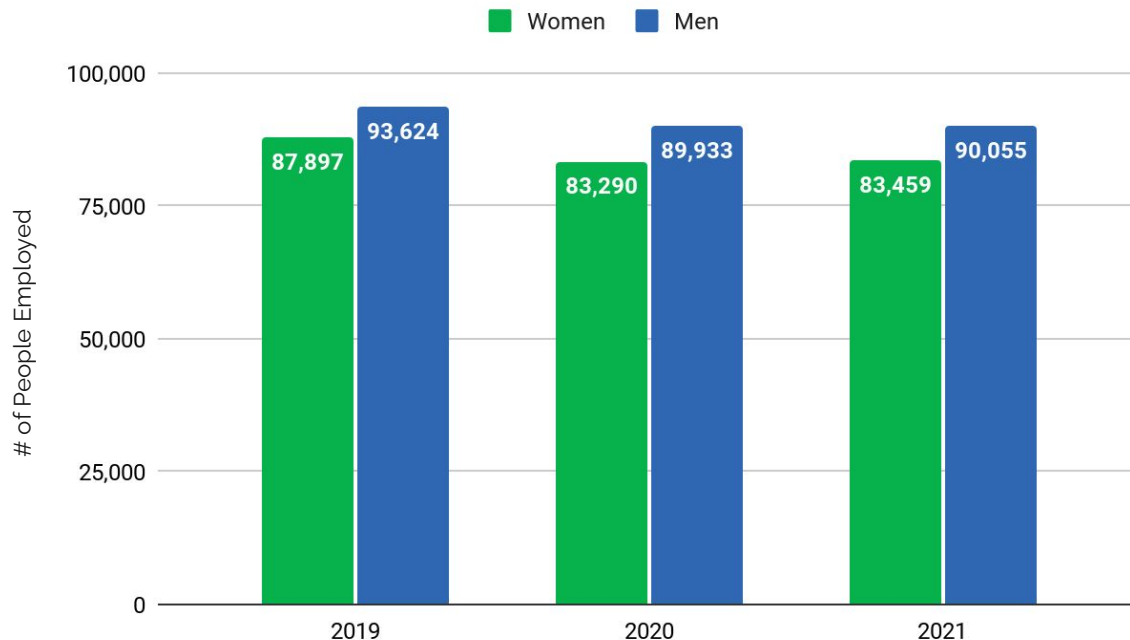


We expect disproportionate impacts for women in the region, like those we're seeing nationally...

1.1 million women have exited the U.S. labor force since February 2020 (while over 400,000 men have entered).

As of March 2022, women's labor force participation rate is at **58.2%** (vs. 70.5% for men).

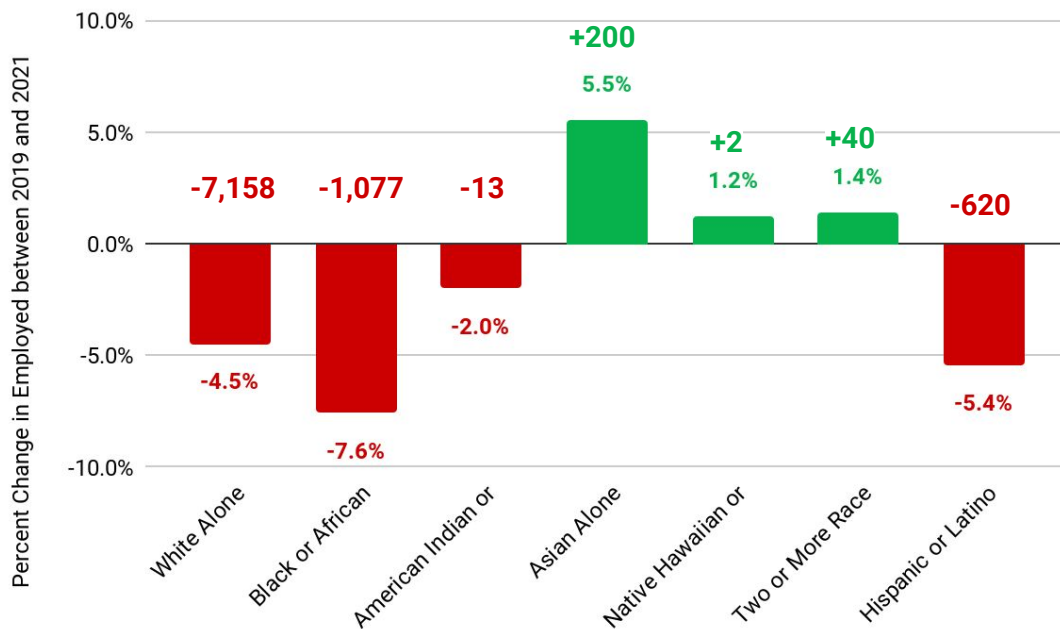
Employment by Gender - York County



5.1% decrease in employed women since 2019, compared to a **3.8% decrease** in employed men.

Since 2019, 4,400 women have remained unemployed. We have yet to see employment for either gender go back to pre-pandemic levels.

Employment Across Race & Ethnicity - York County



7.5% decrease in employment among Black workers since 2019, compared to a **4.5% decrease** in overall employment.

Black and Hispanic or Latino workers have not recovered to pre-pandemic levels

Employment by Age Groups

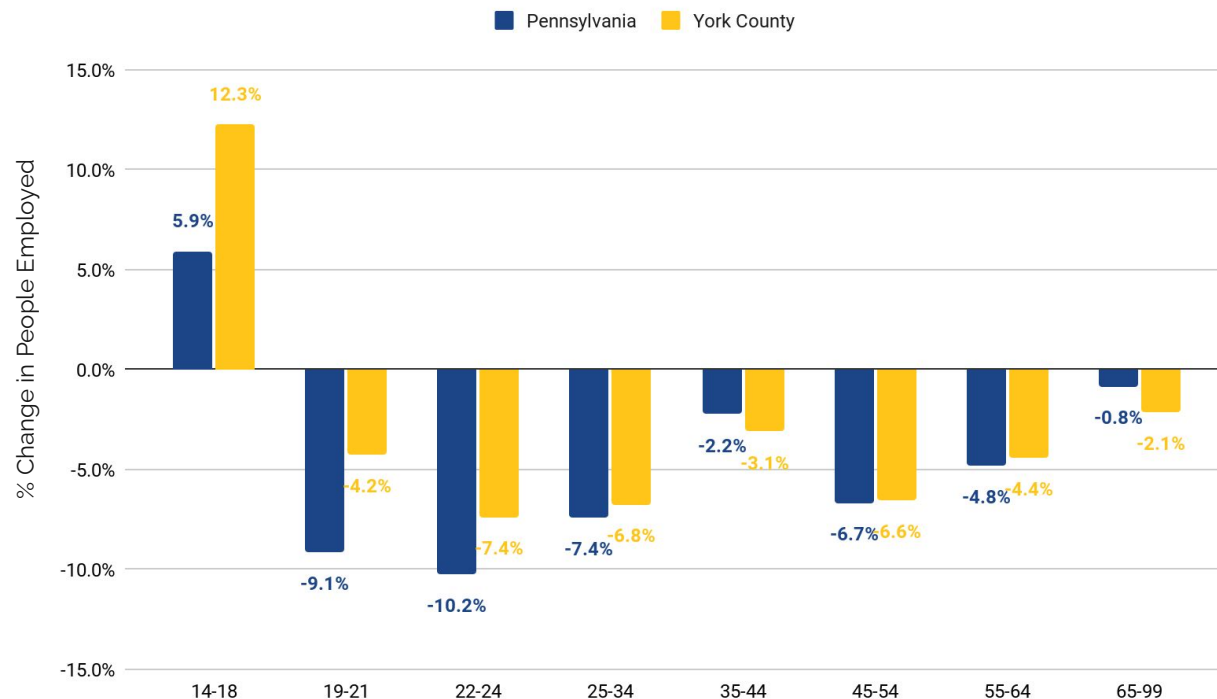
Workers aged 19 - 34 left jobs at high rates from 2019 to 2021



York
County

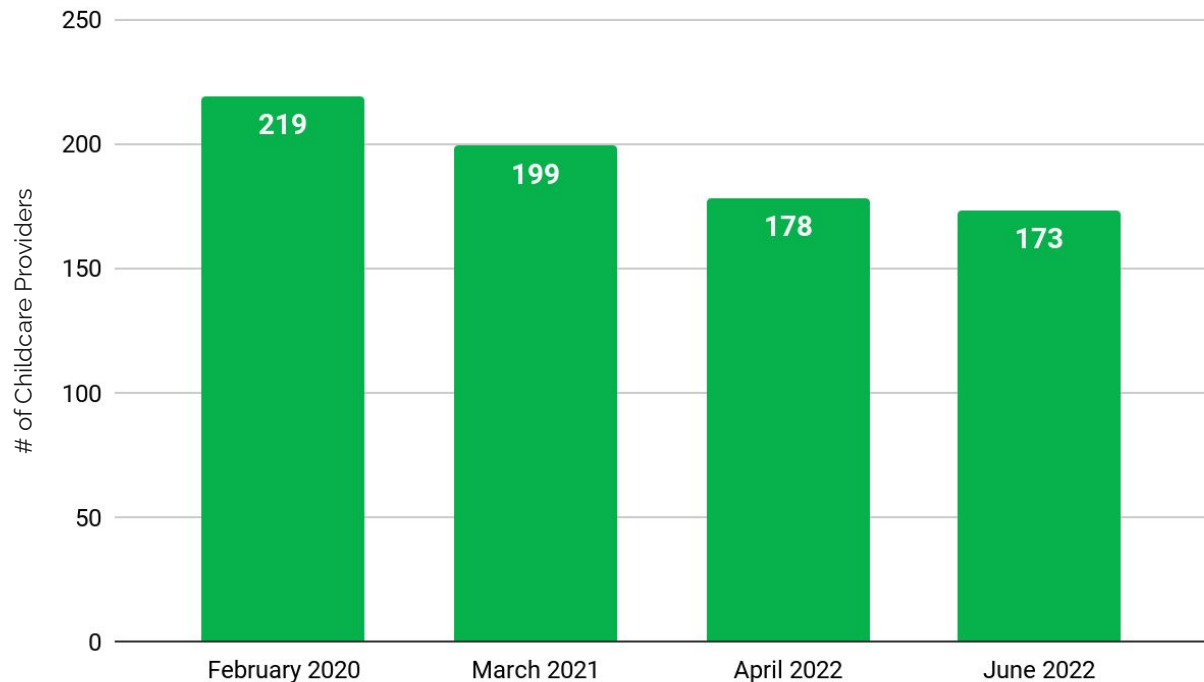


PA



National trends show a decrease in workforce participation of 2% for ages 55 and older.

Childcare Providers in York County



Number of total providers **decreased by 13.1%** since March 2021

On average, **programs are operating at 85% of their typical enrollment.**

Continued staffing issues mean that actual capacity remains below the physical potential.

Estimated Child Care Gap in York County

25,399

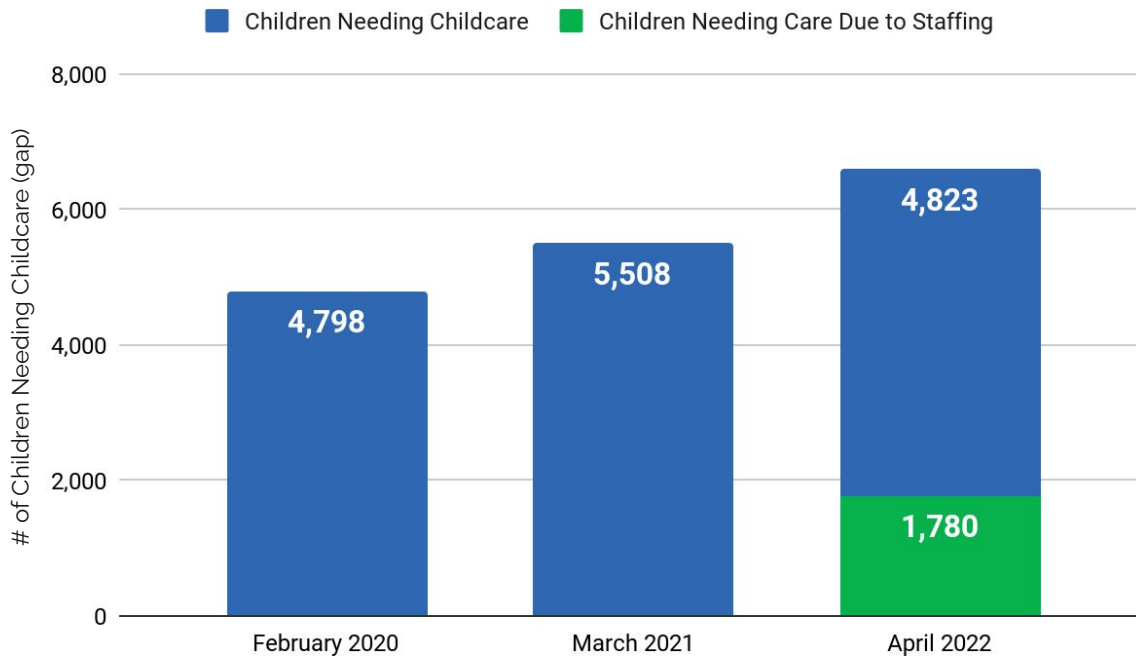
Estimated children under 5 years of age

16,670

Estimated children needing childcare (Total)

4,823

Estimated children needing childcare (Gap)*



Business

Business

In This Section

- COVID-19 Hospitality Industry Recovery Program (CHIRP) Grants
- YoCo Restart Grants
- PPP Funding
- Industry Impacts
- Consumer Spending Trends
- Resident Mobility & Talent Retention

How has CHIRP supported businesses in York County?

Demographics of COVID-19 Hospitality Industry Recovery Program (CHIRP) Applicants

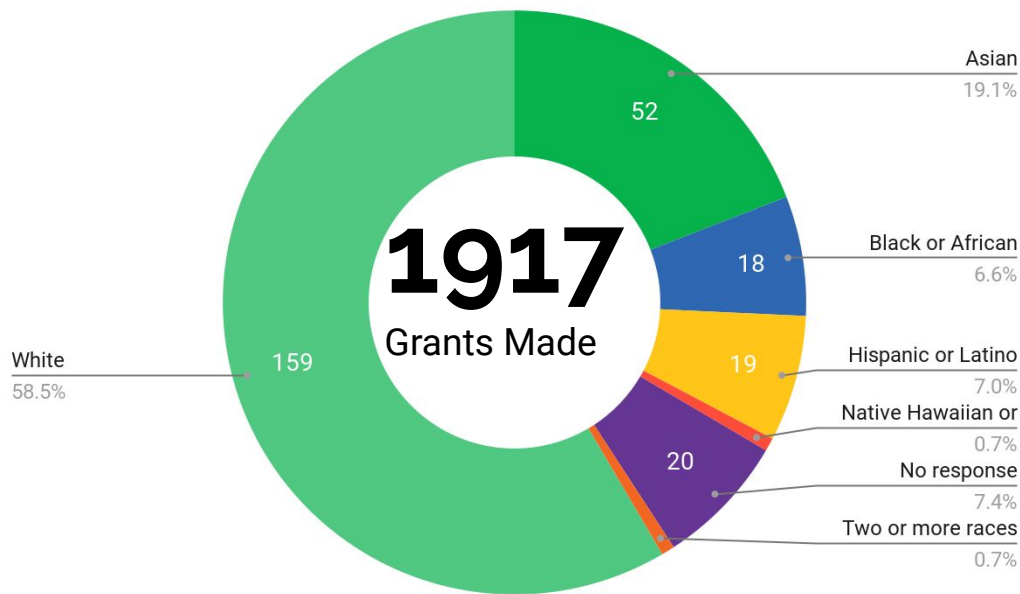
85

women-owned
business
applicants

21

veteran-owned
business
applicants

Majority of applicants were from white-owned businesses, followed by Asian and Hispanic/Latino.

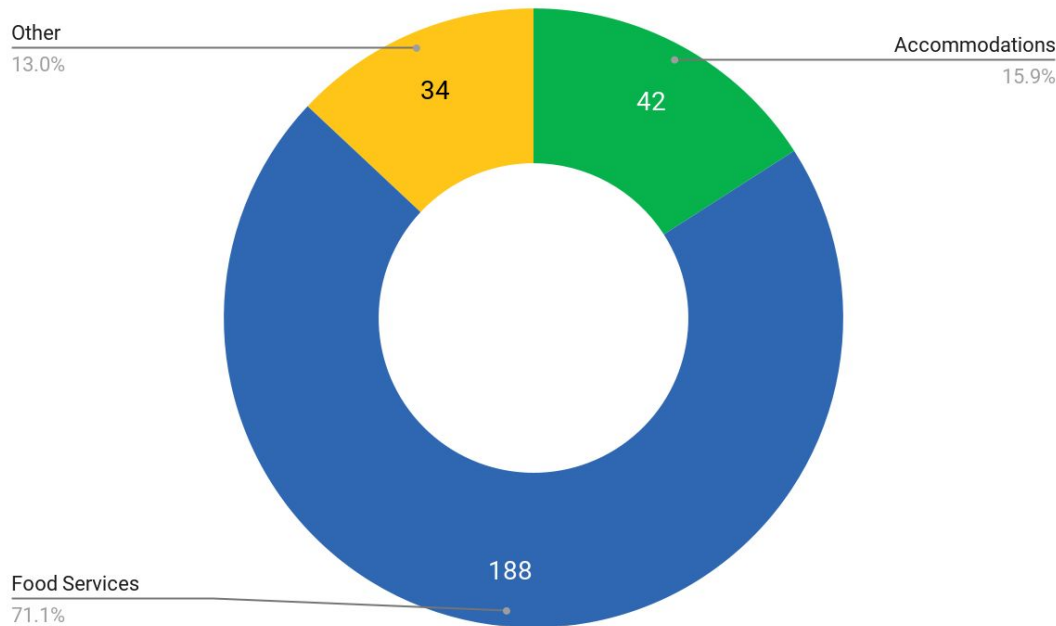


CHIRP provided grant relief to eligible businesses defined by NAICS codes as being in the hospitality/food service/accommodation industry.

CHIRP Applicant Industries

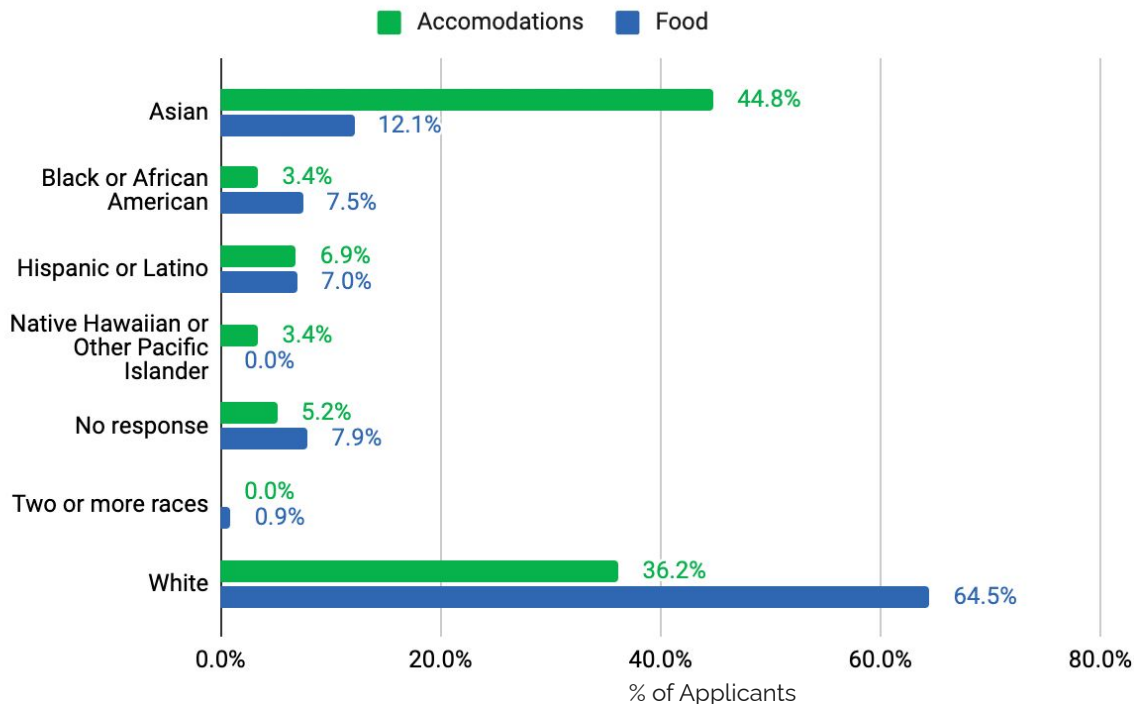
71%

of CHIRP Applicants
were **Food Service**
businesses



CHIRP Applicant Industries by Race

Asian and white business owners make up a larger proportion of CHIRP Applicants

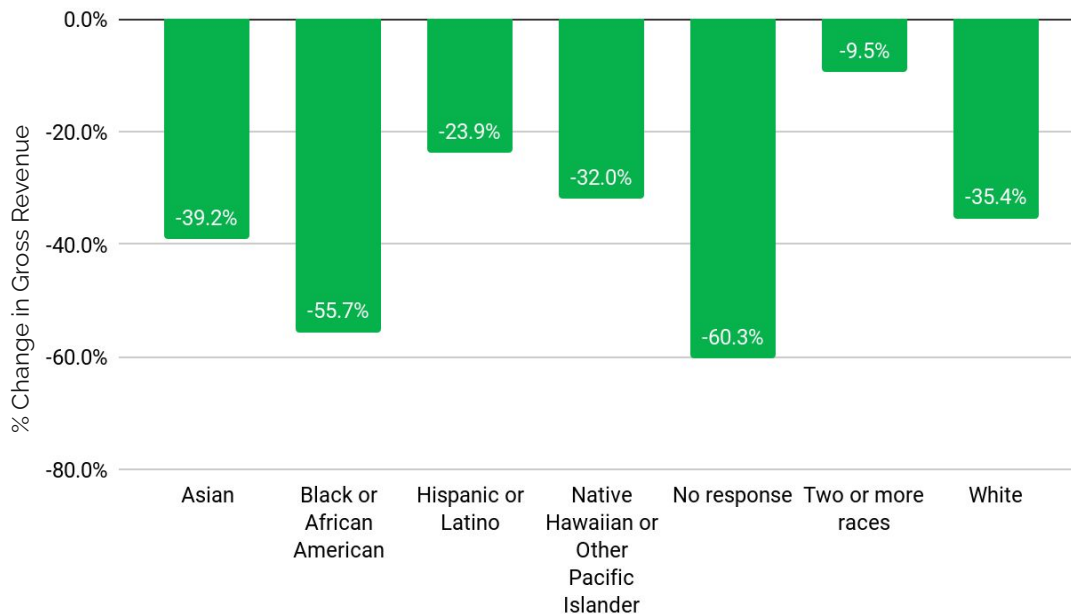


Business Revenue Changes between 2019 and 2020

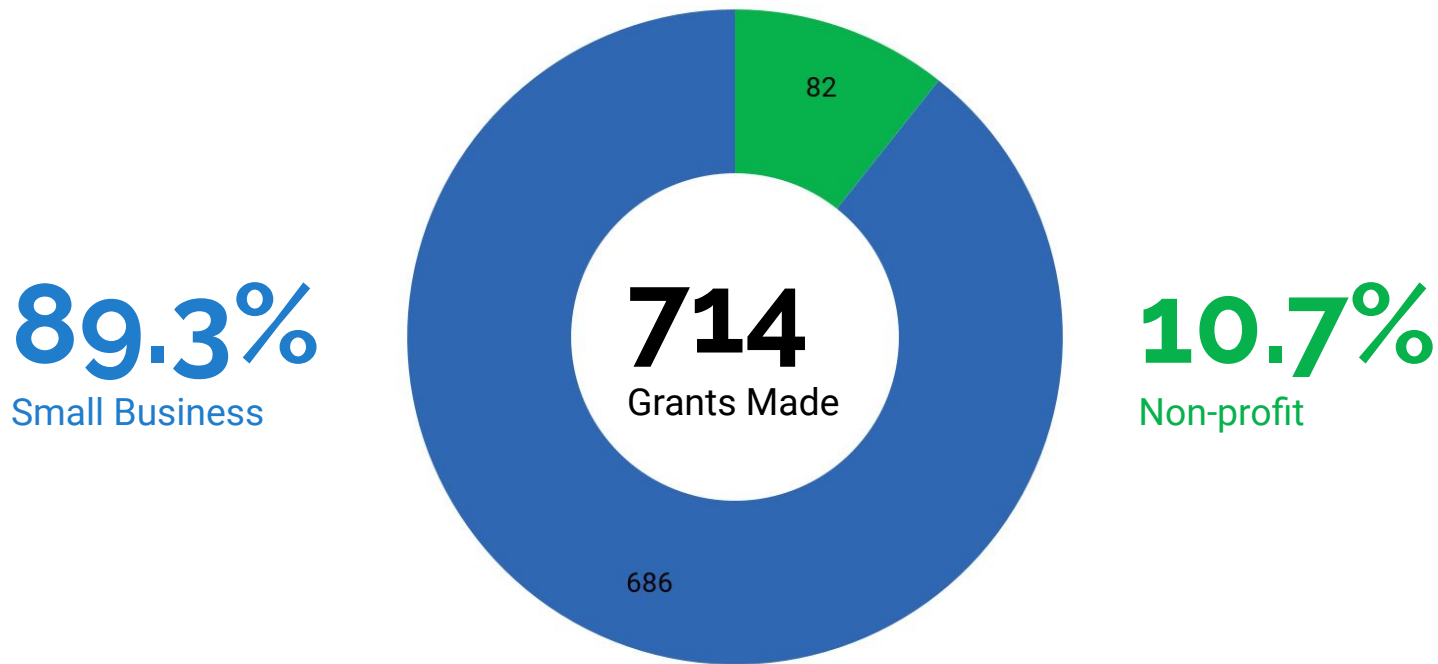
38%

Decrease in Minority-owned Business Revenue

Minority-owned businesses lost revenue at higher rates than white owned businesses between 2019 and 2020.

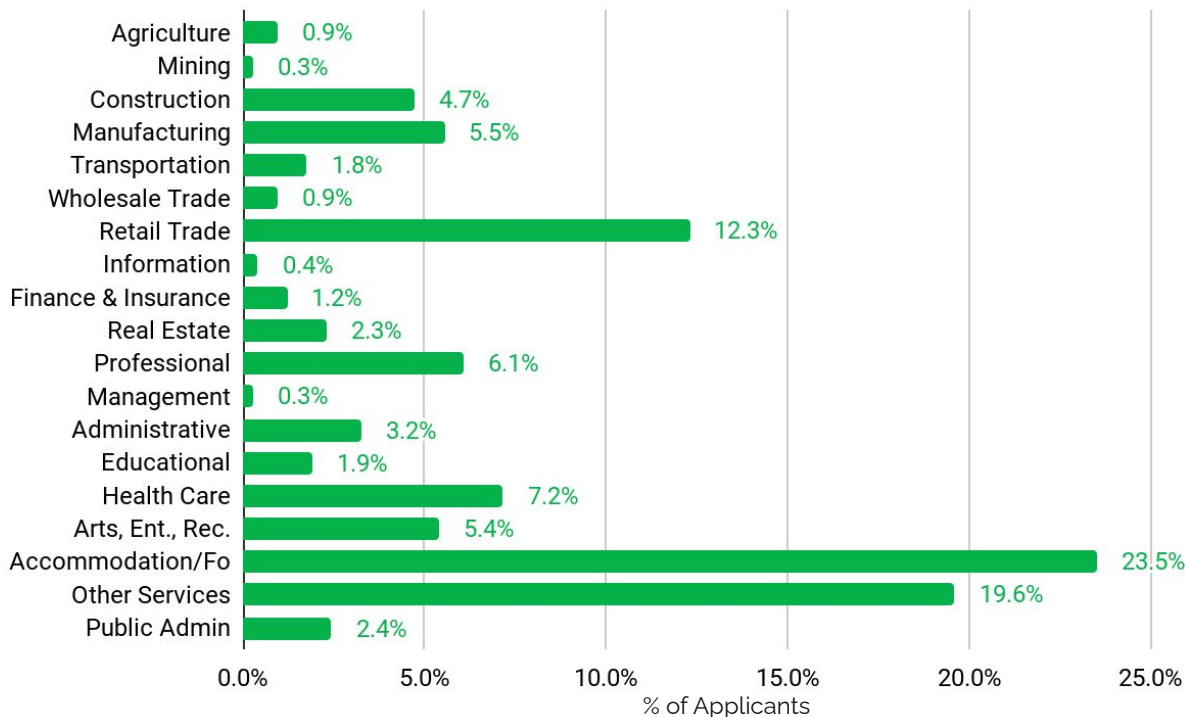


YoCo Restart Grant Applicants by Sector



YoCo Restart Grant Applicants by Industry

Majority of business that applied were in industries most affected by the shutdown.

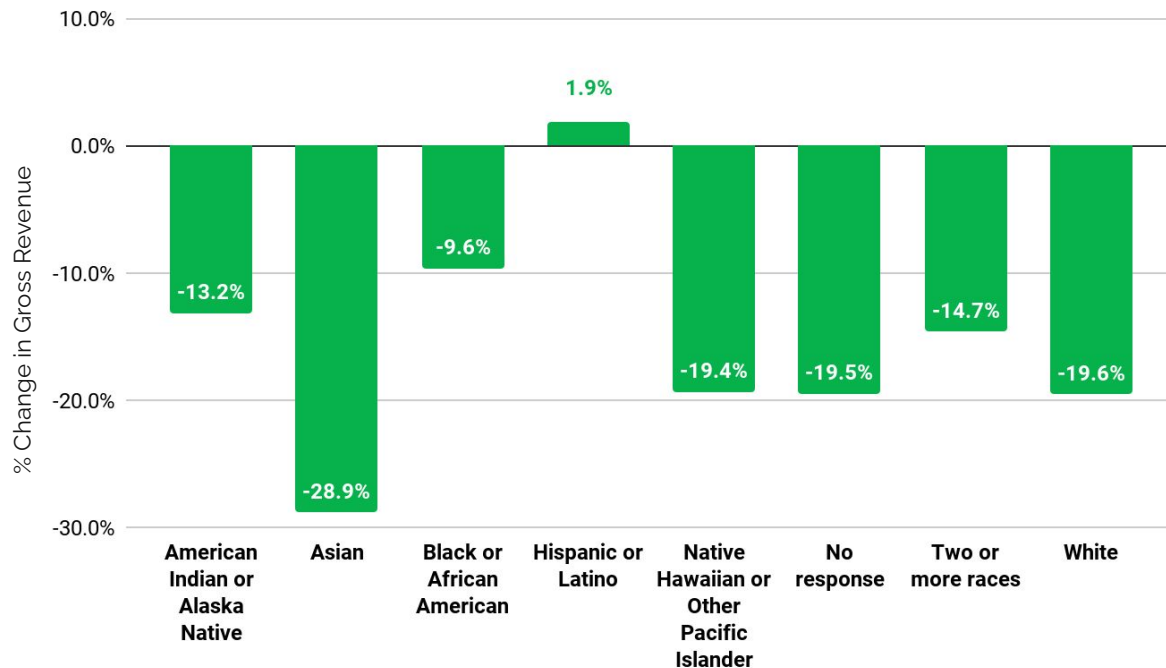


YoCo Restart Grant Applicants - Change in Revenue

19.5%

**Decrease in Business
Revenue**

All businesses saw a significant decrease in revenue from 2019 to 2020.



How has the Small Business
Administration - Paycheck Protection
Program (PPP) supported businesses in
York County?

PPP Funding

1,566 entities in **York County** are estimated to have received PPP funding totaling approximately **\$616.4 Million**.

Program ran March 2020 to May 2021

For Comparison:

State



303,894 total loans
\$30.4 Billion total funding

National



4,969,215 total loans
\$513.7 Billion total funding

Industry Summary - COVID-19 Impacts

	Workers (2020)	Economically Vulnerable Workers (Part-time or earning under \$40K)	Job Growth (Pre-Pandemic to 2021)	Wage Growth (Pre-Pandemic to 2021)	Impact of PPP Funding (Portion of operating expenses covered by PPP)	Unemployment (National unemployment, Jan 2021)	Shift in Consumer Spending (Based off of consumer expenditure data)
Accommodation & Food	12,486						Negative
Administrative & Waste	10,620						Negative
Utilities	1,361						Positive
Other Services	6,630						Negative
Management	4,138						Negative
Mining	260						Positive
Retail Trade	20,100						Mixed
Transportation & Warehousing	10,510						Mixed
Arts, Ent., & Rec.	1,673						Negative
Education	11,346						Negative
Agriculture	630						Positive
Public Admin.	4,272						Mixed
Manufacturing	31,580						Mixed
Finance & Insurance	3,962						Negative
Information	880						Positive
Health Care & Social Asst.	26,770						Positive
Wholesale Trade	6,334						Mixed
Real Estate	1,608						Positive
Professional & Technical	6,797						Mixed
Construction	11,628						Positive

Most impacted by the
COVID-19 pandemic

Least impacted by the
COVID-19 pandemic

14%

Of the region's workers are employed in the three **most impacted** industries Including Accommodation & Food, Administrative & Waste, and Utilities. These industries represent **24,467 workers**.

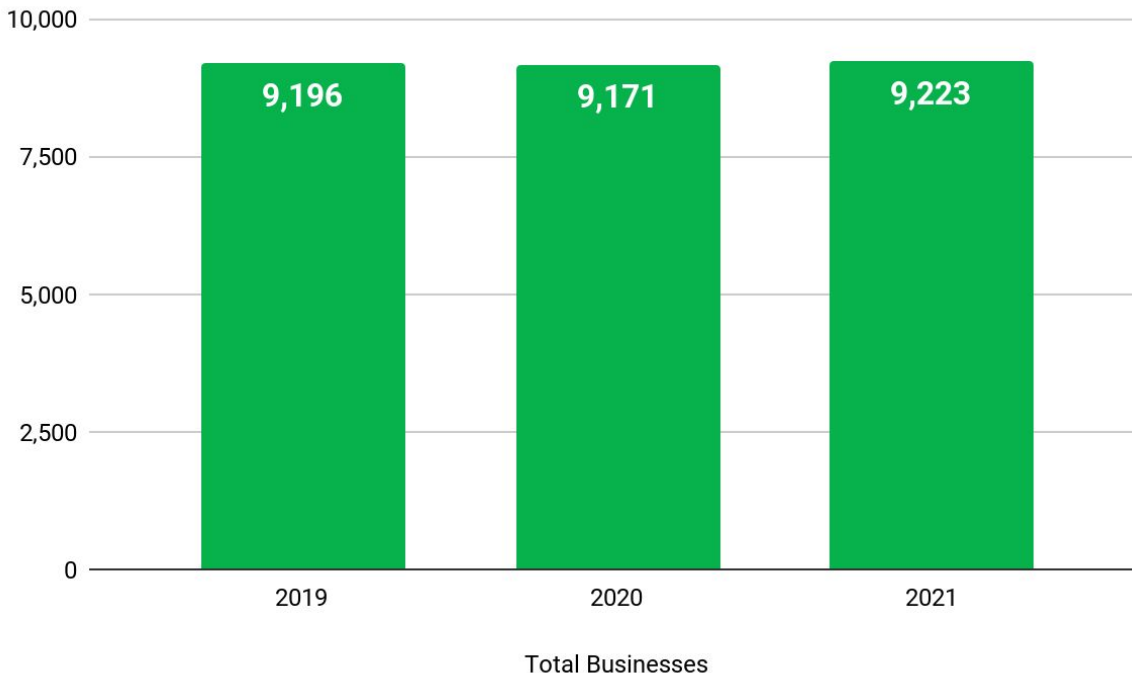
52%

Of the region's workers are employed in the seven **least impacted** industries Including Manufacturing, Finance & Insurance, Information, Health Care & Social Asst, Wholesale Trade, Professional & Technical. These industries represent **59,100 workers**.

Business Changes in York County, 2019-2021

There was a **decrease** of **21 businesses** between 2019 and 2020.

Followed by a **increase** of **52 businesses** between 2020 and 2021.



New Business Formations, 2019-2021

44%

increase in new
business formations
between 2019-2021

Total businesses in York decreased from 2019 to 2020 but there was a rise in entrepreneurship.

- 3,994 filings for an EIN in 2021. Increase in entrepreneurship in York from 2019 to 2021.

How have shifts in consumer spending impact businesses nationally?

Shifts in Consumer Spending, Nationally

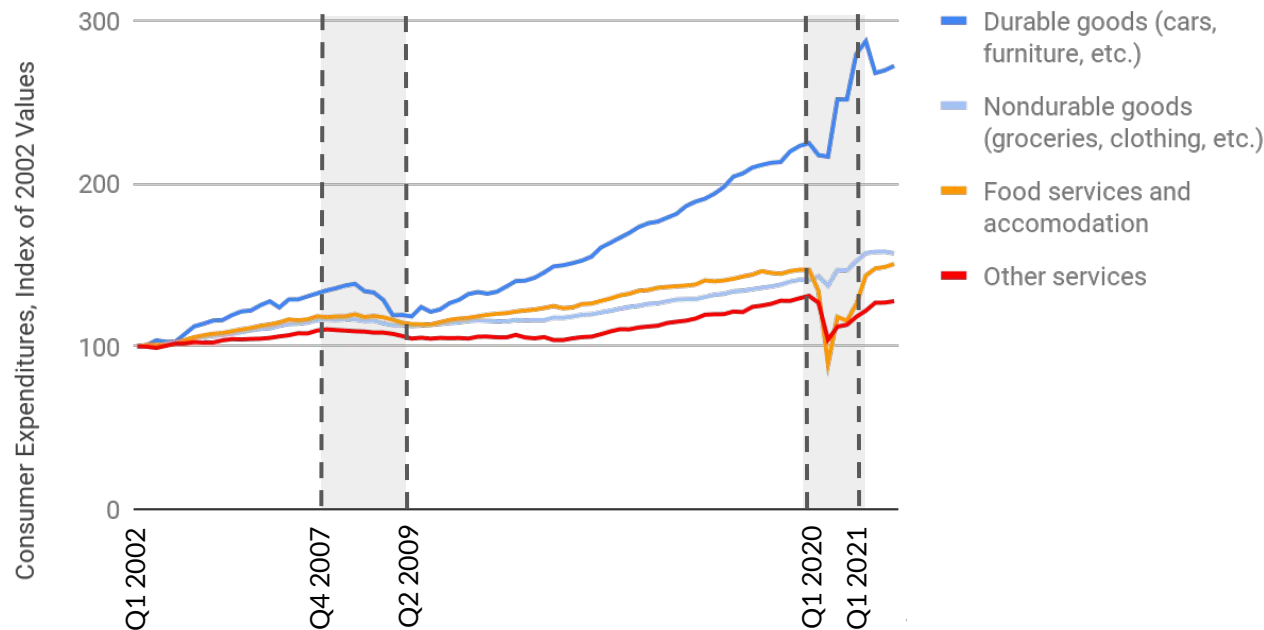
The pandemic shifted consumer spending **away from services and to consumer goods**.

Spending on food services and accommodations rose by 22.4% since late 2020 but only 1.5% compared to pre-pandemic levels.

Spending on other services like laundry and personal care was down 21% in the early pandemic and by early 2022 remained down 1.5%.

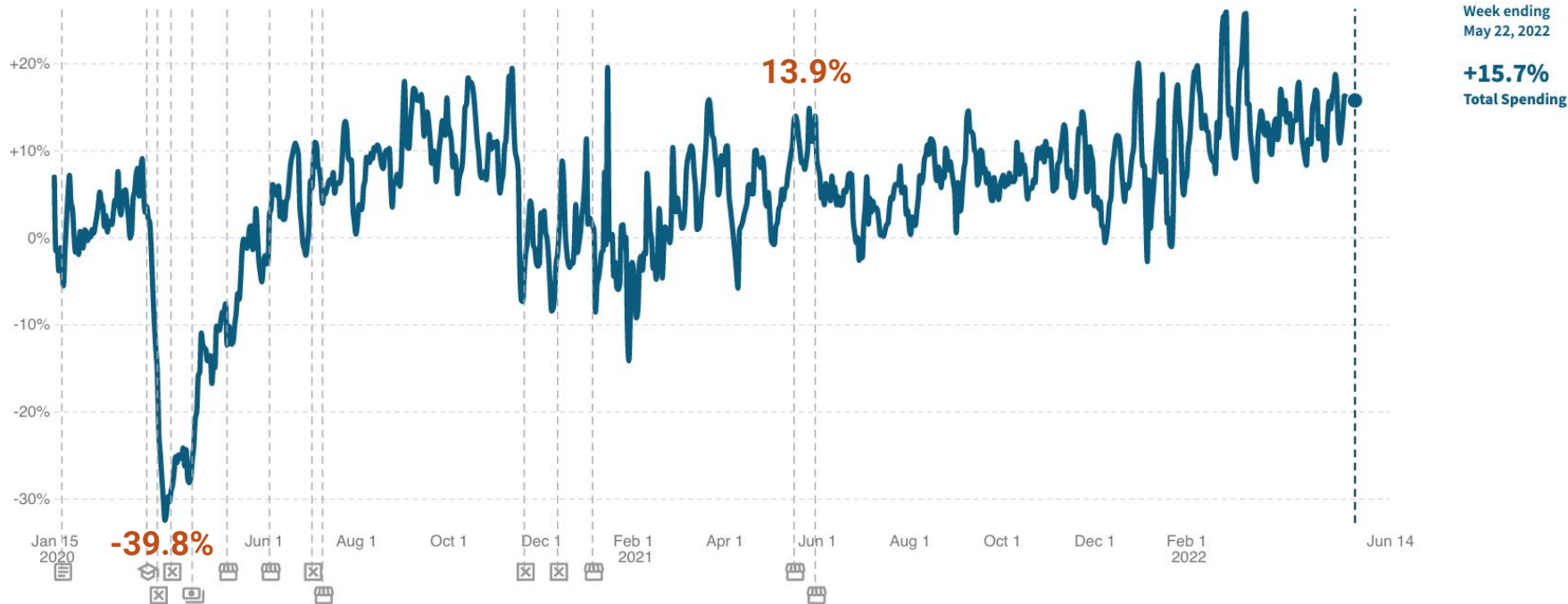
By mid 2021, **spending on goods reached all time high**.

Consumer Spending



Percent Change in All Consumer Spending*

In **York**, as of **May 22 2022**, total spending by all consumers **increased** by **15.7%** compared to January 2020.



data source: **Affinity**

*Change in average consumer credit and debit card spending, indexed to January 4-31, 2020 and seasonally adjusted. The dashed segment of the line is provisional data, which may be subject to non-negligible revisions as newer data is posted. This series is based on data from Affinity Solutions.

last updated: **June 03, 2022** next update expected: **June 17, 2022**

visit tracktherecovery.org to explore

Industry Impact Summary

Pre-Pandemic:

Jobs paying less than \$40K are most vulnerable to layoffs and reduced hours.

Early Pandemic:

Government mandated closures brought much of the economy to a halt. Distribution of PPP loans allowed shuttered businesses to continue paying their employees. However only covering paychecks does not account for the other costs to sustain a business.

Adjusting to COVID:

- Some industries are slowly returning to pre-pandemic levels, but others are lagging, and some may experience a permanent transformation of their operations.
- Rise in remote work options is being made more permanent in many businesses
- Government aid provided a lifeline during the worst of the crisis
- Consumer spending continues to shift

Resident Mobility and Talent Retention

Talent Retention, Attraction, and Mobility

Retention

Connecting those in the area with local employment opportunities and developing existing talent pools.

Attraction

Highlighting the desirability of a place to live, work, and play to attract former residents and others with ties to the region.

Resident Mobility

Understanding mobility trends can provide insights into the talent coming in or leaving the county.



In York County,

By using geographical mobility by education levels as a proxy for talent attraction and retention, there is an overall positive trend in educated people staying and moving in.

Resident Mobility in York County

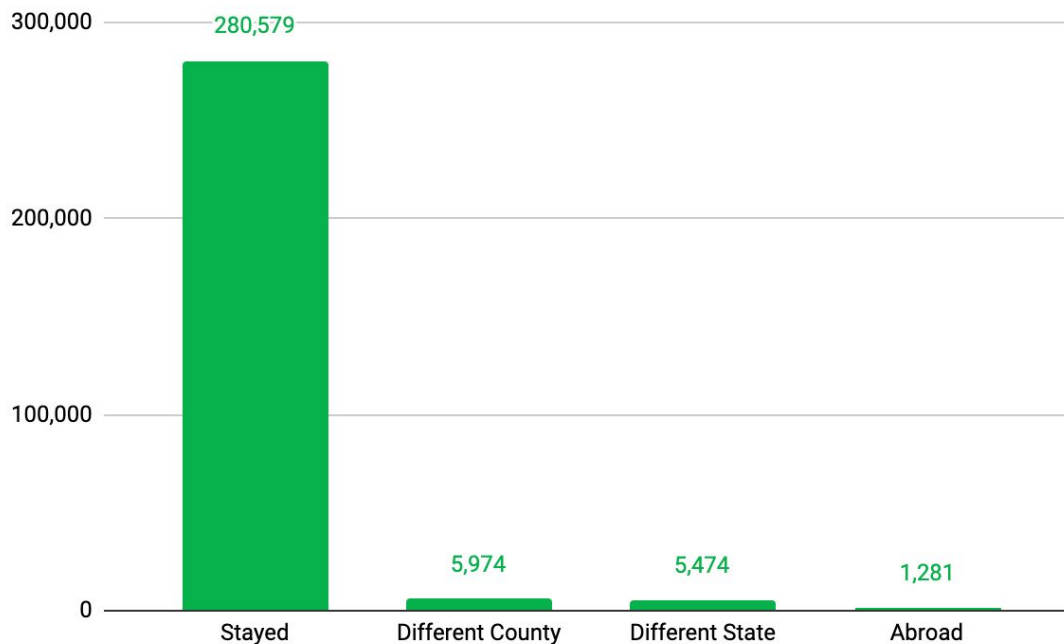
Of the population 25
years and older:

90%

Stayed in their current
residence

4%

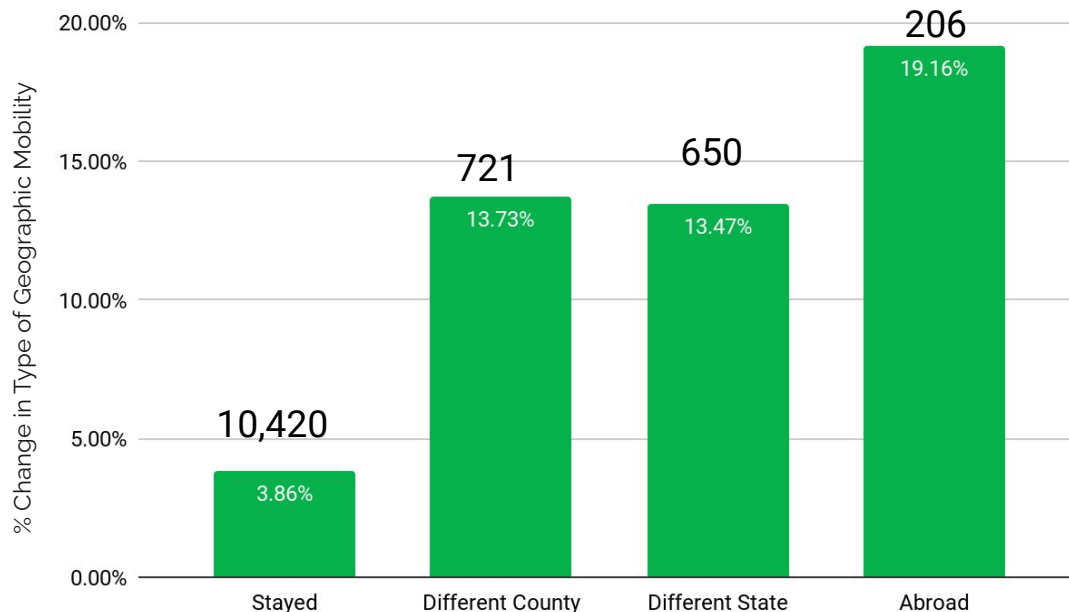
Moved from different
county, state, or abroad



Changes in Resident Mobility from 2015-2020

Movement into York County from abroad increased significantly in the last 5 years, **19%** represents a gain of **206 residents**

While most people stayed in York, there's been an increase in people moving into the county.

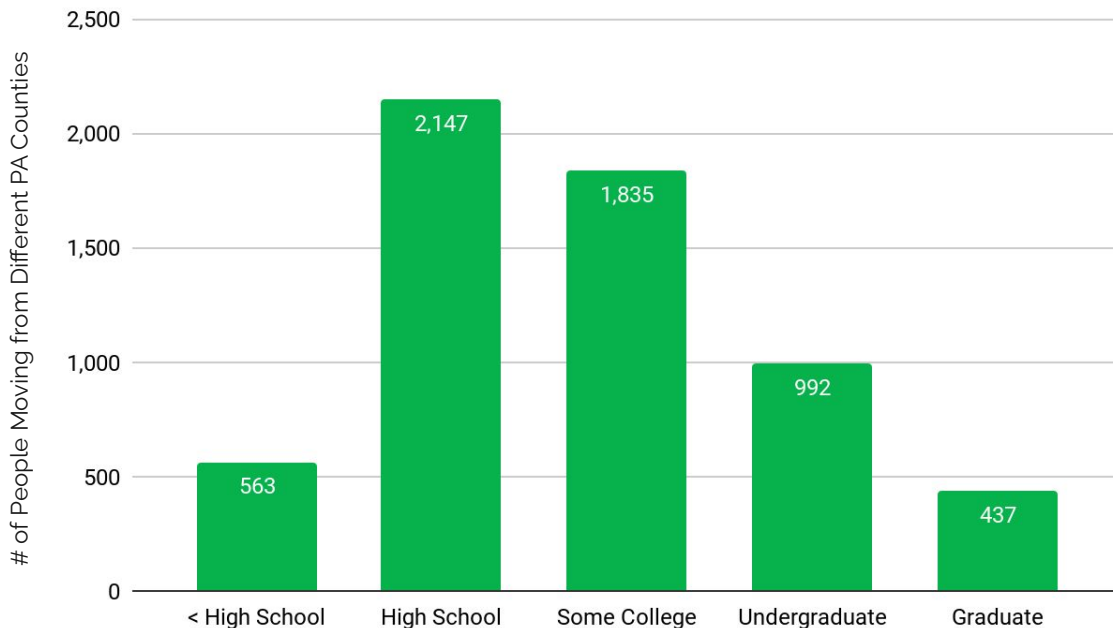


Education of Movers from Different PA Counties

5,974

People moved to York from a different PA county

Of the people moving into the county from other counties in PA, **majority only have a high school diploma - 2,147.**

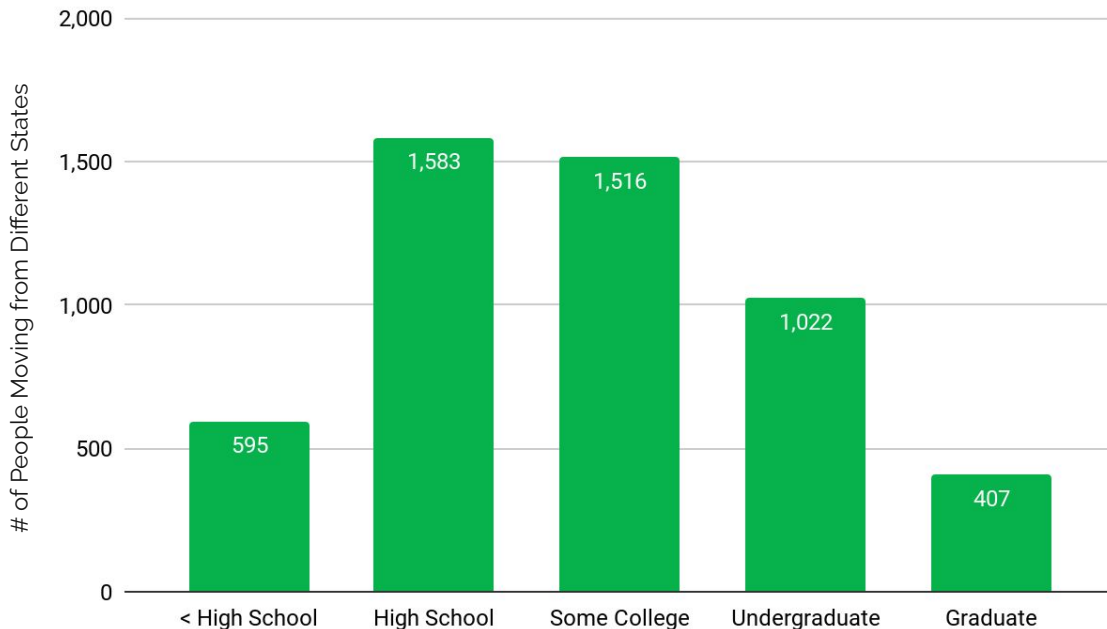


Education of Movers from Different States

5,474

People moved to York from a different state

Of the people moving into the county from other states, **majority only have a high school diploma - 1,583.**

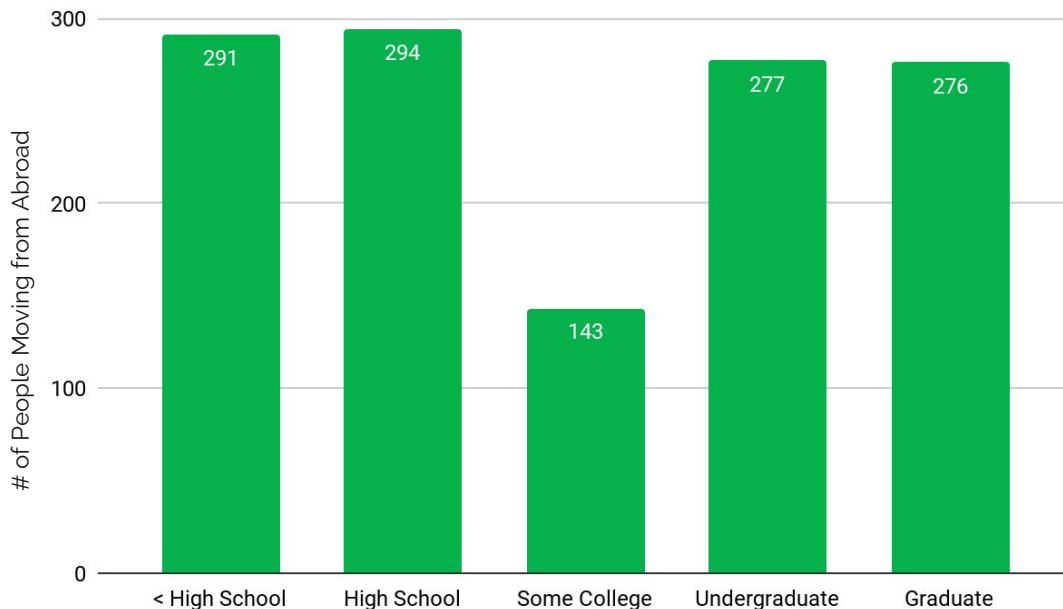


Education of Movers from Abroad

1,281

People moved to York from a abroad

Of the people moving into the county from abroad, there's a diverse mix of education levels. Notably, people moving from abroad **are highly educated**.



Resident Mobility County Comparison

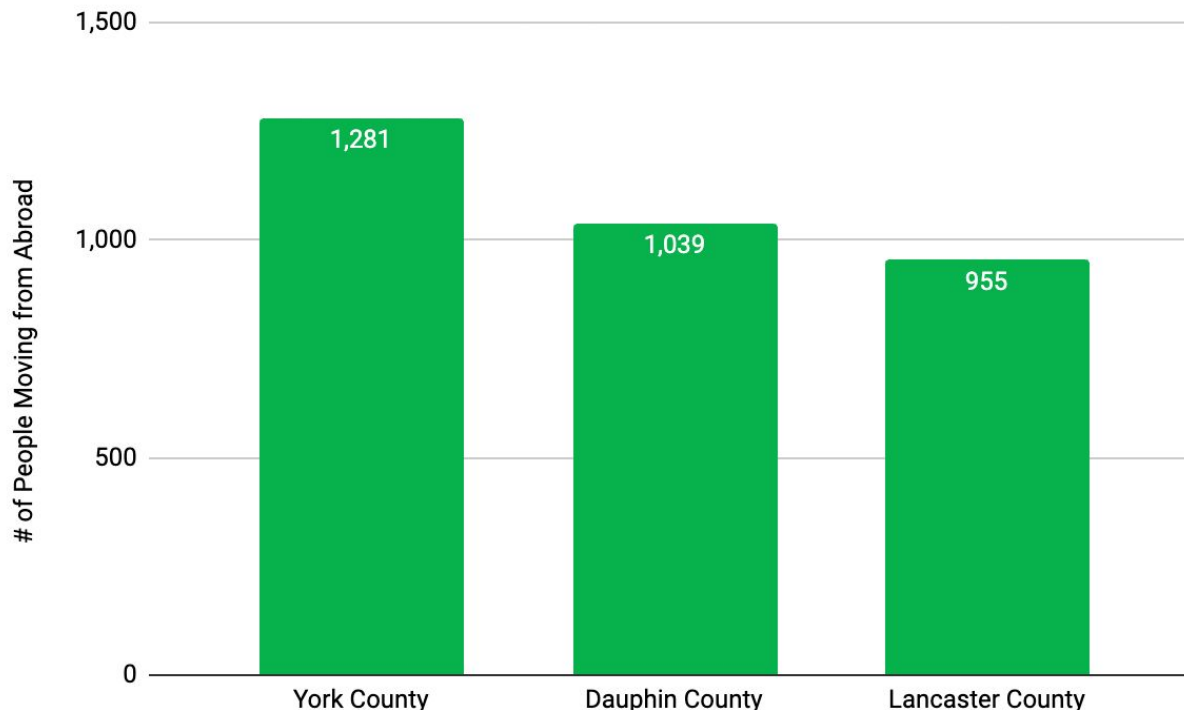
568

More people moved to York from abroad than to Dauphin and Lancaster Counties.

More people from abroad are moving to York than to surrounding counties.

5%

Decrease in people moving from abroad into Pennsylvania from 2015 to 2020.

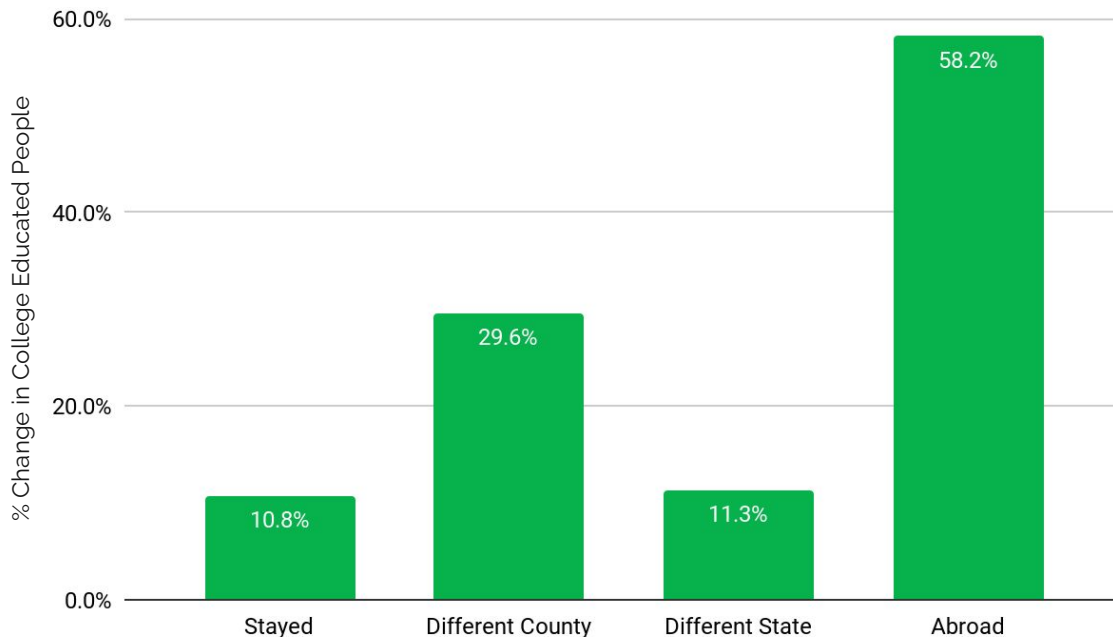


Mobility of College-Educated Residents Between 2015 and 2020

159,920

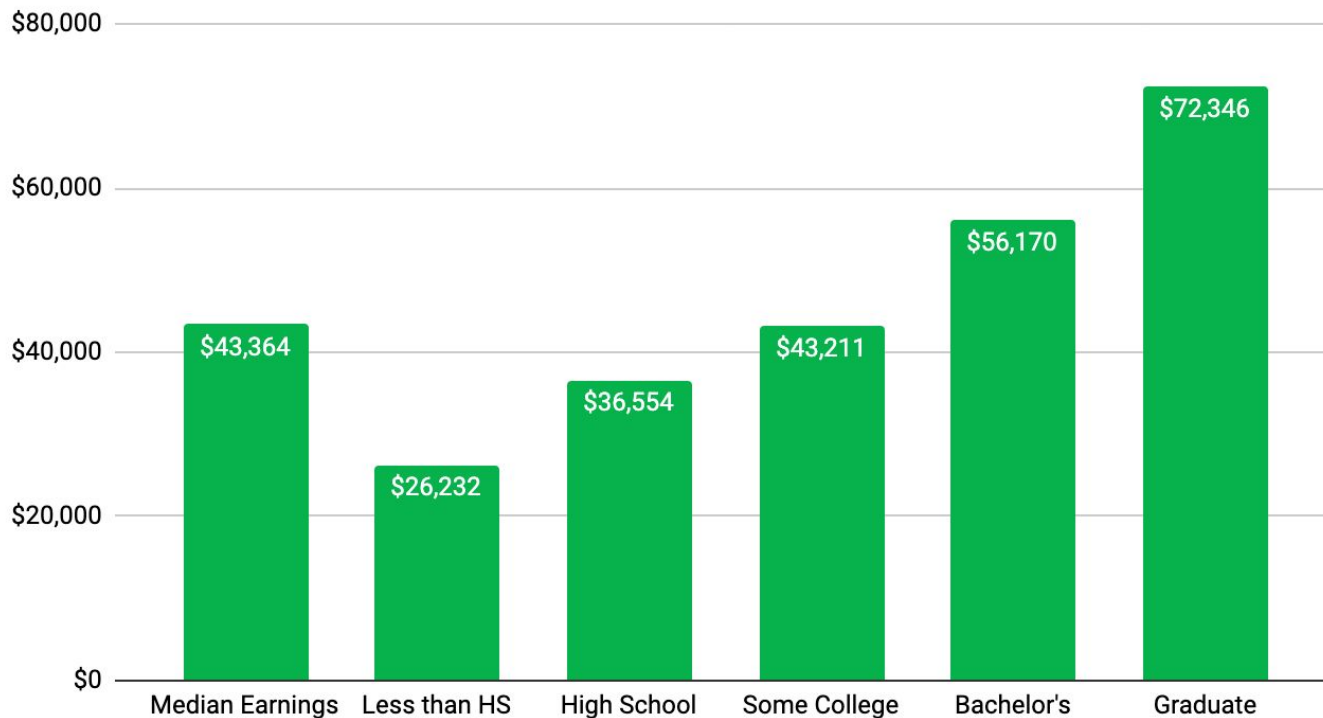
College educated York residents

Over the last 5-years, the county has attracted a significant amount of college educated people, and the number of college educated residents who have stayed in the county has increased by 10.8%. **This could be a good indicator of talent attraction and retention.**

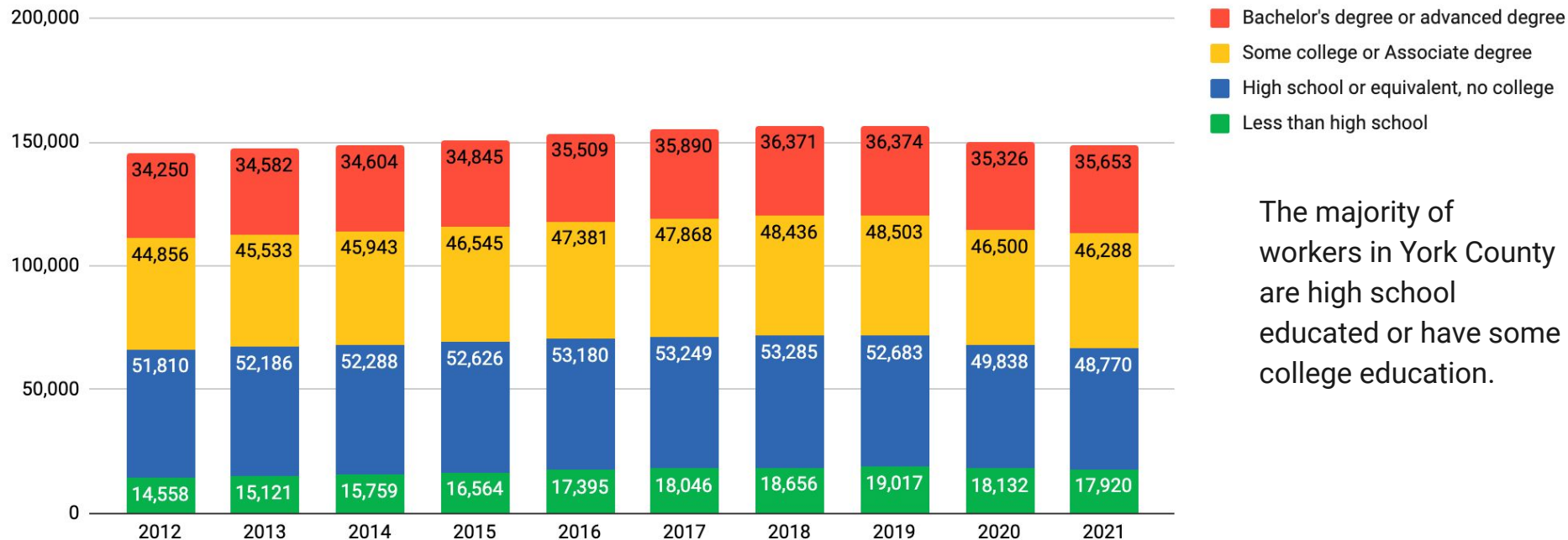


Median Income by Educational Attainment, York County

Bachelors or higher degree holders earn more than the median for York County.



Educational Attainment, York County



The majority of workers in York County are high school educated or have some college education.

In summary/a look ahead...

INDUSTRY/JOB

- **Job numbers are starting to recover** - but have not returned to pre-pandemic levels. Still, unemployment rate has returned to pre-pandemic levels in York County. Due to York County having proportionally more people exit the labor force than in PA. This affected women significantly more than men and, most of all, non-white women.
- The industries with the most employees in York County **saw an increase in wages compared to before the pandemic**, including frontline workers (Manufacturing, Health Care/Social Assistance) and low-wage workers (Retail Trade Accommodations/Food Services). **However, the county experienced declining jobs in its five largest industries** (these four, plus construction).
- The county's accommodation, retail, and food businesses experienced **decreased revenue**, but CHIRP and YoCo Restart Grants helped many.
- The pandemic shifted consumer spending **away from services and to consumer goods**. Ongoing supply chain issues will continue to create sporadic shortages and price increases. Inflationary pressures are eroding wage gains for lower-wage workers and households.

In summary/a look ahead...

PEOPLE

- **Vulnerable Workers:** The number of households earning less than the ALICE survival budget threshold has increased since 2021, despite these wage gains. Requests for social services have decreased in 2022, but that is likely due to emergency relief programs like ERAP (Emergency Rental Assistance Program), which provides much-needed funding to cover basic household needs. As these programs expire, residents are again facing difficulty paying rent and mortgage, with a sharp uptick in people falling behind in 2022.
 - ▶ Compounding this, York County's median home listing prices are higher and rising faster than the median in Pennsylvania. Increasing home and rental prices make it difficult for families to attain homeownership.
 - ▶ Childcare capacity is limited, which is holding people back from the labor force, likely due to the lack of childcare provider staff.
- **Talent attraction and migration:** There's been an increase in people moving into the county, and the region is retaining more people. The county has attracted a significant amount of college-educated people, and the number of college-educated residents who have stayed in the county has increased by 10.8%. Ultimately, a good indicator of talent attraction and retention.

Thank you.

