

A photograph of the Charlotte skyline, featuring several prominent skyscrapers. The image is overlaid with a semi-transparent blue filter. In the bottom left corner, there is a logo for the Charlotte Regional Business Alliance. In the bottom right corner, there is a white triangular graphic containing the title and date of the survey.

Manufacturing Labor Market Survey, Charlotte Region November 2022

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Overview

Overview

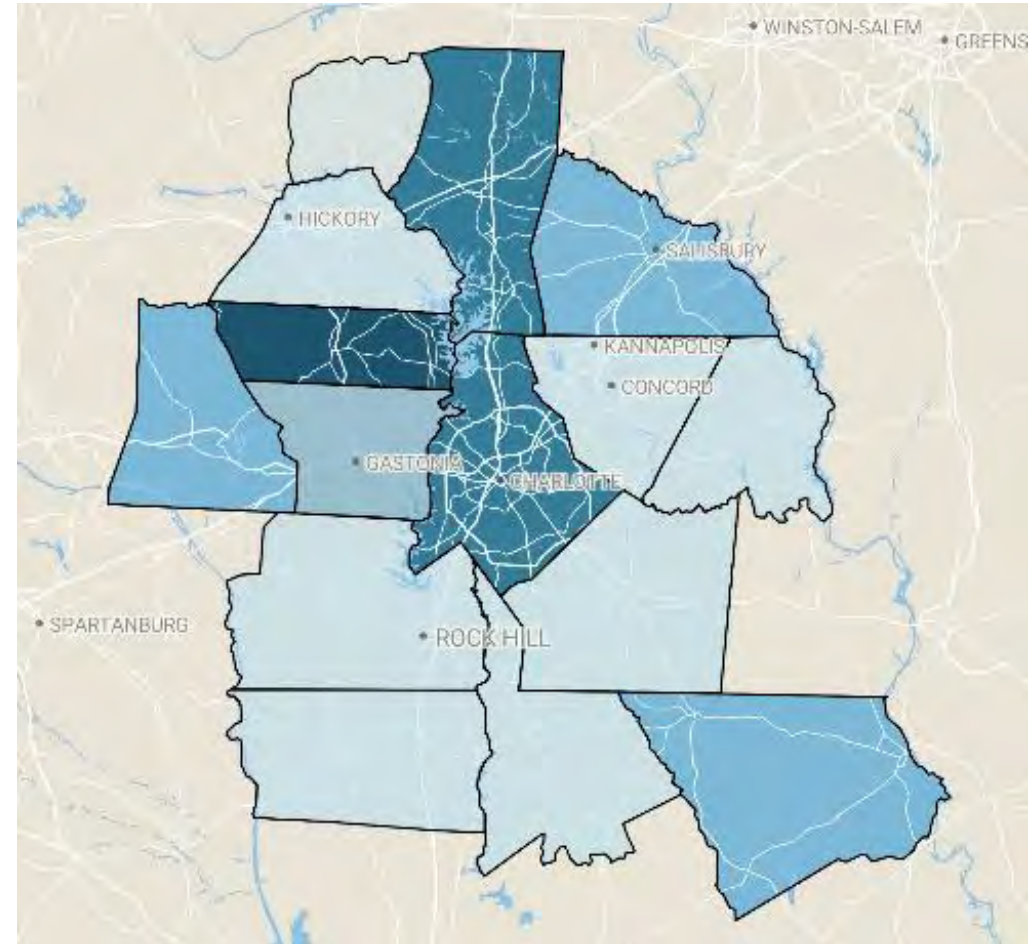
- The regional survey was open from June 2022 to October 2022.
- There was a total of 103 responses.
- Respondents represent firms from 10 counties in the Charlotte Region: Cabarrus, Chesterfield, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, and Union County.
- Catawba County and York County have conducted their own surveys; hence, they did not actively participate in this survey.

Company Operations in the Charlotte Region

Location of Manufacturing Operations

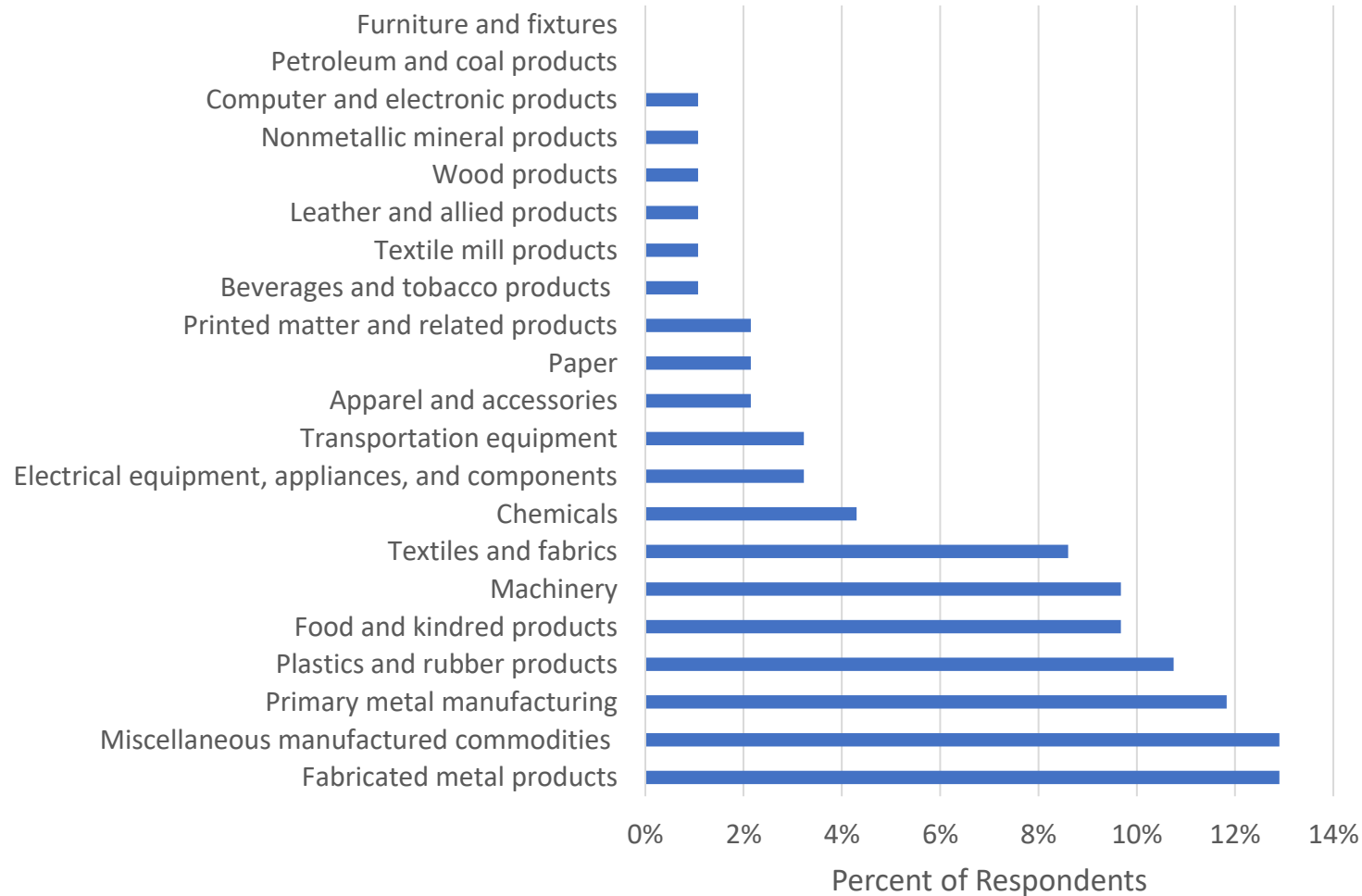
Located County	Percent of Respondents
Alexander	0%
Cabarrus	3%
Catawba	0%
Chester	0%
Chesterfield	8%
Cleveland	7%
Gaston	10%
Iredell	19%
Lancaster	0%
Lincoln	25%
Mecklenburg	15%
Rowan	8%
Stanly	3%
Union	1%
York	0%

N = 101



What sub-industry are the region's manufacturers in?

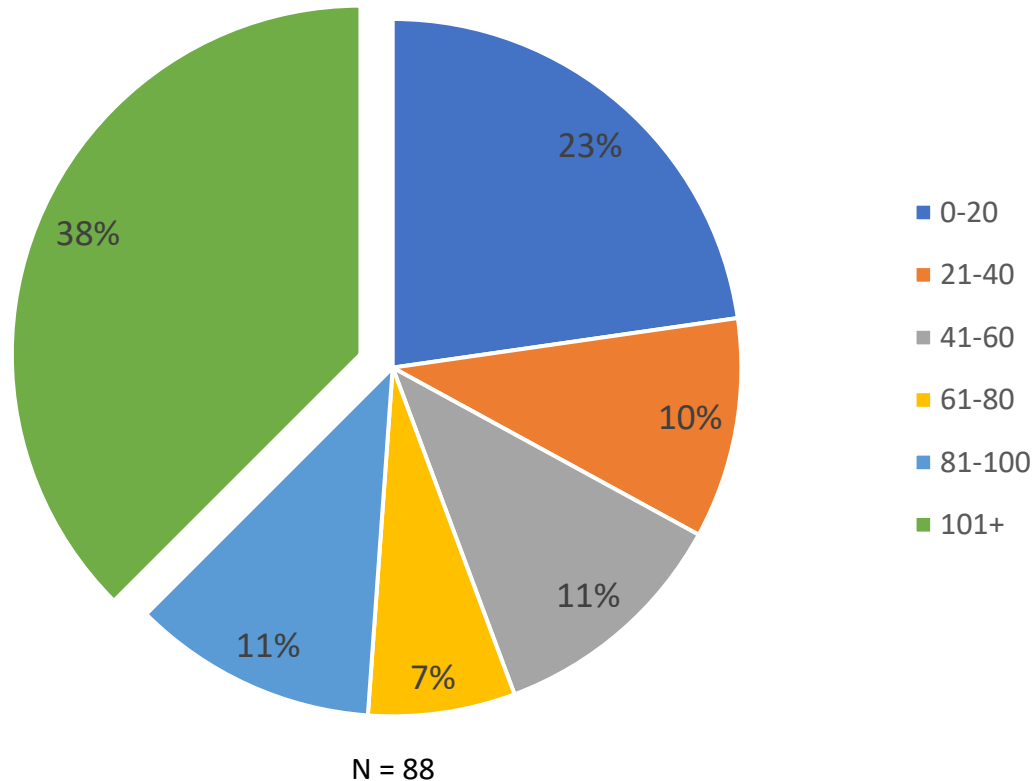
Respondents by Sub-Industry



N = 93

Employee Size for the Charlotte Region

Share of Respondents by Employee Size



Based on respondents, most firms have a workforce larger than 100.

The average employee size, based on respondents, was 164 and the median was 77. Total employee size ranged from 0 to 2000.

Employee Size by County

Rank	County	Average Employee Size
1	Rowan	249
2	Lincoln	165
3	Iredell	141
4	Cleveland	107
5	Gaston	102
6	Mecklenburg	79
7	Stanly	78
8	Chesterfield	44
9	Catawba	12
10	Union	11
11	Cabarrus	3
12	Lancaster	1
13	York	1
14 and 15	Alexander and Chester	0

Based on average employee size for each responding firm by county, Rowan County had the most employees with an average of 249.

Following Rowan County was Lincoln County, Iredell County, Cleveland County, and Gaston County.

Operational Function of Location

Function	Percentage
Headquarters	15%
Manufacturing	30%
R&D	9%
Warehouse and Distribution	19%
Sales	18%
Service	8%
Other	2%

N = 96

Based on respondents, the most common operational function of a firm's location within the region is related to manufacturing.

Other performed functions involve office functions (such as HR or accounting), customer training, and specific sub-industry practices.

Sectors That Firms Supply

Sector	Percentage
Aerospace	8%
Automotive	15%
Defense	6%
Energy/utilities	6%
Electronics	6%
Food and beverage	12%
Healthcare/medical	10%
Industrial machinery	9%
Metals	6%
Retail	7%
Scientific services	3%
Other	12%

N = 97

Based on respondents, the most common sector that firms supply is the automotive sector.

Other sectors that were mentioned include space, housing and construction, agriculture, education, logistics and transportation, engineering, safety, and racing.

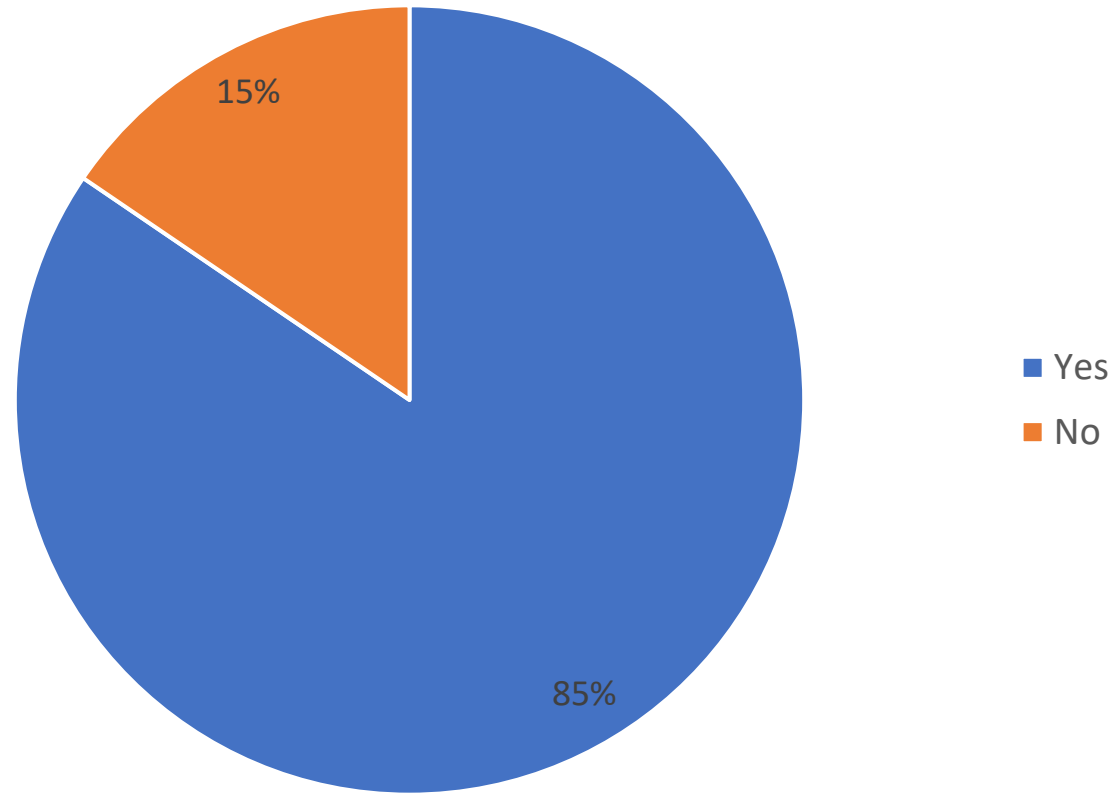
Employee Turnover Rate

Turnover Rate (%)	Production	Sales	Executive	Office
0-20	75%	97%	95%	91%
21-40	21%	2%	2%	8%
41-60	2%	0%	0%	0%
61-80	1%	0%	2%	0%
81-100	0%	2%	2%	2%
	N = 84	N = 58	N = 55	N = 64

For all types of staff in production, sales, executive, and office, most responding firms have a turnover rate between 0 and 20%.

Employment and Wages

Were employees added this year?



N = 71

Employees by Classification (part 1)

Percent of Employees	FT Production	FT Sales	FT Executive	FT Office	PT Production	PT Sales	PT Executive	PT Office
0 - 9	13%	69%	80%	53%	88%	88%	94%	100%
10 - 19	4%	18%	10%	22%	6%	0%	0%	0%
20 - 29	10%	6%	5%	7%	0%	13%	0%	0%
30 - 39	1%	0%	2%	8%	0%	0%	0%	0%
40 - 49	4%	0%	0%	3%	0%	0%	6%	0%
50 - 59	6%	0%	0%	0%	3%	0%	0%	0%
60 - 69	15%	0%	0%	3%	0%	0%	0%	0%
70 - 79	12%	0%	0%	0%	3%	0%	0%	0%
80 - 89	16%	0%	0%	0%	0%	0%	0%	0%
90 - 100	16%	6%	3%	3%	0%	0%	0%	0%

FT = Full Time
PT = Part Time

N = 67

N = 49

N = 59

N = 60

N = 32

N = 16

N = 17

N = 21

See above for the percent of employees in each classification by the percent of responding firms.

For example: 13% of firms said that 0 to 9% of their staff are full time production employees.

Employees by Classification (part 2)

Percent of Employees	FT Permanent	FT Temporary	FT Hourly	FT Salaried	PT Permanent	PT Temporary	PT Hourly	PT Salaried
0 - 9	8%	45%	8%	25%	33%	28%	42%	25%
10 - 19	2%	9%	6%	30%	0%	2%	0%	0%
20 - 29	13%	0%	9%	11%	0%	0%	0%	0%
30 - 39	2%	2%	6%	9%	0%	0%	0%	0%
40 - 49	2%	0%	2%	5%	2%	0%	0%	0%
50 - 59	2%	0%	3%	0%	0%	0%	0%	0%
60 - 69	2%	0%	11%	3%	0%	0%	0%	0%
70 - 79	5%	0%	13%	2%	2%	0%	3%	0%
80 - 89	19%	2%	13%	0%	0%	0%	0%	0%
90 - 100	48%	2%	9%	0%	0%	0%	2%	0%

FT = Full Time
PT = Part Time

N = 64

N = 38

N = 51

N = 54

N = 23

N = 19

N = 30

N = 16

See above for the percent of employees in each classification by the percent of responding firms.

For example: 8% of firms said that 0 to 9% of their staff are full time permanent employees.

What is the hourly wage* for...

Based on respondents, the **overall** hourly wage for entry-level/unskilled ranged from \$10 to \$28, with the average and median being \$16.

	Hourly Wage
Average	16
Median	16
Min	10
Max	28

N = 67

See below for the average wage, median wage, minimum and maximum wage in dollar values for 3 different types of employees.

Type of Employee**	Average Hourly Wage	Median	Min	Max
Non-Exempt/Hourly Administrative	21	20	13	41
Non-Exempt/Hourly Unskilled or Semi-Skilled	18	18	10	25
Non-Exempt/Hourly Skilled or Technical	24	25	12	50

*All values are presented in USD.

**Administrative employees have N=51, unskilled or semi-skilled have N=57, hourly skilled or technical have N=60.

Hourly Wage* for Temporary/Contract Workers

Type of Employee**	Average	Median	Min	Max
Non-exempt/Hourly - Administrative	21	17	12	80
Non-exempt/Hourly - Unskilled/Semi-Skilled	16	16	10	30
Non-exempt/Hourly - Skilled/Technical	18	18	12	30

See above for the average salary, median salary, and the minimum and maximum salary for temporary/contract workers.

*All values are presented in USD.

**Administrative employees have N=18, unskilled or semi-skilled have N=29, and skilled/technical have N=21.

Average Hourly Wage* for Production Jobs (part 1)

Production Job	Average	Median	Min	Max
Buyer/Purchasing Agent	32	30	20	60
Chemical Operator	20	20	18	25
CNC Operator	23	22	18	35
CNC Machinist	29	28	20	48
Fabricator (non-welding)	20	21	14	30
Field Service Technician	34	34	22	43
Forklift Operator	18	17	14	22
Frontline Supervisor	28	30	14	43
Industrial Maintenance	28	30	19	40
Injection Molding Technician	23	22	18	32
Machine Operator (automated/semi-automated)	20	20	15	25

*All values are presented in USD.

Average Hourly Wage* for Production Jobs (part 2)

Production Job**	Average	Median	Min	Max
Machinist (manual/non-CNC)	25	26	13	33
Manufacturing/Industrial Engineer	42	40	25	67
Metal Treatment Operator (heat treating, plating, etc.)	21	23	17	23
Operators/Production Manager	43	40	29	72
Painter (Wet or Powder Coating)	24	24	17	30
Quality Assurance	27	22	16	50
Truck Driver (CDL) – local	22	22	19	25
Warehouse Associate	19	18	15	25
Warehouse Manager	31	31	20	42
Warehouse Selector	17	17	15	19
Welder	22	22	18	30

Entry Level Hourly Wage* for Production Jobs (part 1)

Production Job	Average	Median	Min	Max
Buyer/Purchasing Agent	25	26	12	35
Chemical Operator	18	18	13	26
CNC Operator	21	20	14	32
CNC Machinist	24	22	20	35
Fabricator (non-welding)	18	18	10	30
Field Service Technician	29	29	26	30
Forklift Operator	17	17	12	20
Frontline Supervisor	26	27	14	36
Industrial Maintenance	24	24	17	30
Injection Molding Technician	22	22	19	25
Machine Operator (automated/semi-automated)	18	18	15	23

Entry Level Hourly Wage* for Production Jobs (part 2)

Production Job**	Average	Median	Min	Max
Machinst (manual/non-CNC)	22	22	12	30
Manufacturing/Industrial Engineer	37	35	26	52
Metal Treatment Operator (heat treating, plating, etc.)	19	18	16	23
Operators/Production Manager	37	36	24	60
Painter (Wet or Powder Coating)	19	18	15	25
Quality Assurance	21	20	13	36
Truck Driver (CDL) - local	19	19	17	22
Warehouse Associate	16	16	11	21
Warehouse Manager	26	28	16	34
Warehouse Selector	16	16	14	19
Welder	19	19	14	22

*All values are presented in USD.

** Truck driver(CDL) – over the road was removed due to insufficient data.

Average Annual Salary* for Exempt/Salaried

Type of Employee**	Average	Median	Min	Max
Administrative	61,586	60,000	38,000	95,000
Unskilled/Semi-Skilled	57,422	50,000	35,000	125,563
Technical/Production	76,874	75,000	35,000	149,092
Exeutive/Management	126,647	117,500	50,000	250,000

See above for the average salary, median salary, and the minimum and maximum salary for each type of employee.

*All values are presented in USD.

**Administrative employees have N=45, unskilled or semi-skilled have N=23, technical or production have N=40, and executive or management have N=50.

Average Annual Salary* for Front-Office Positions

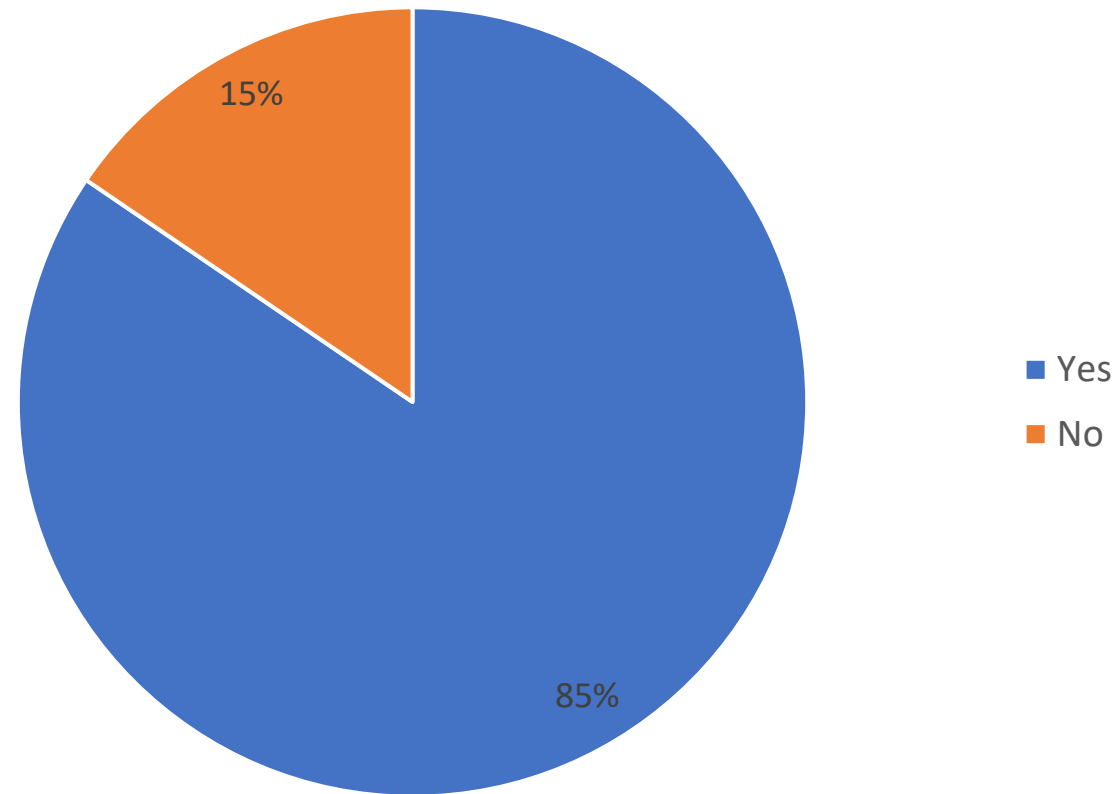
Position	Average	Median	Min	Max
Accountant	69,915	70,500	45,000	100,000
Controller	99,383	100,000	60,000	164,000
Customer Service	48,376	45,000	25,000	80,000
Engineer	86,994	84,000	50,000	139,050
Engineer Manager	116,289	115,000	72,000	175,000
Environmental Health and Safety Specialist	85,544	88,000	57,000	136,697
HR Manager	92,937	90,000	60,000	135,000
HR Generalist	71,854	72,000	45,000	90,000
Marketing and Communications Specialist	67,710	64,257	45,000	118,688

See above for the average salary, median salary, and the minimum and maximum salary for each type of front-office position.

*All values are presented in USD.

**Total N ranges from 13 to 33.

Are wage increases expected for production jobs?



N = 65

Wage Increases for Production Occupations

Position Type	Average	Median	Min	Max
Full Time	10%	5%	3%	30%
Part Time	4%	4%	0%	15%
Contract	3%	3%	0%	10%

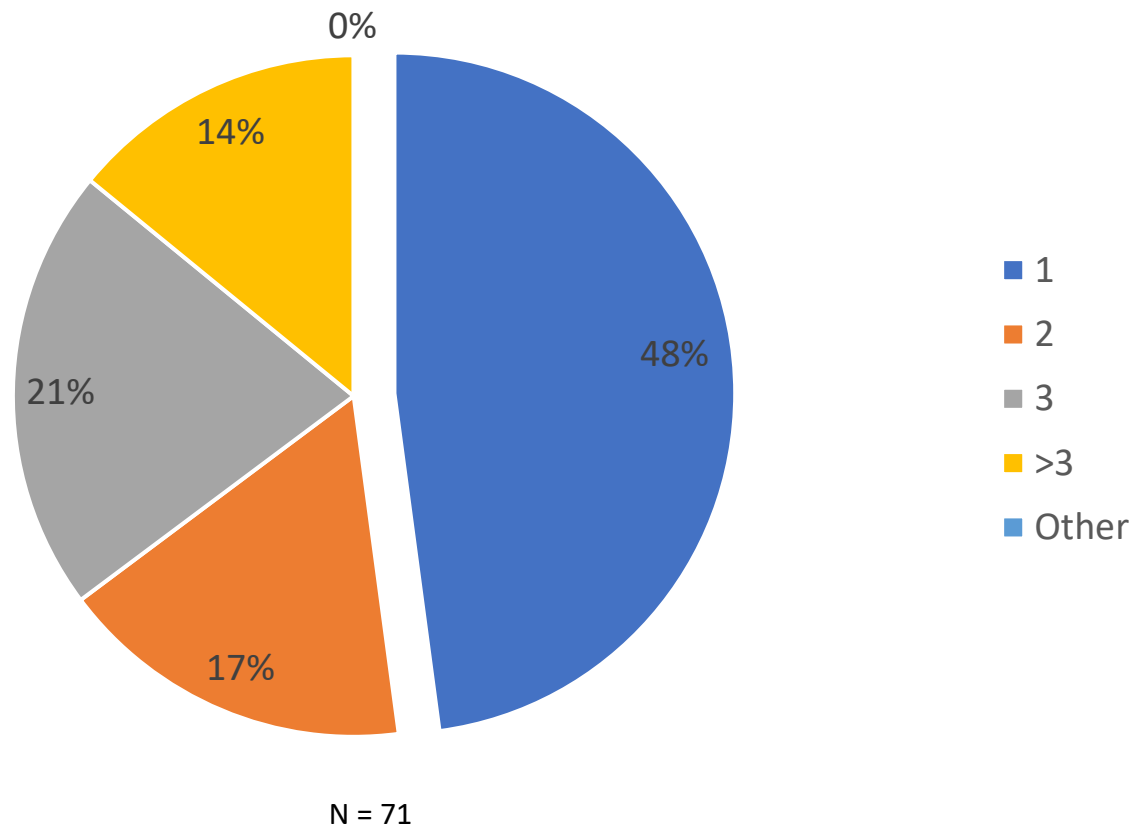
N = 17-48

See above for the average, median, and the minimum and maximum wage increase for each type of position.

Shifts and Turnover

Number of Shifts in Primary Operation

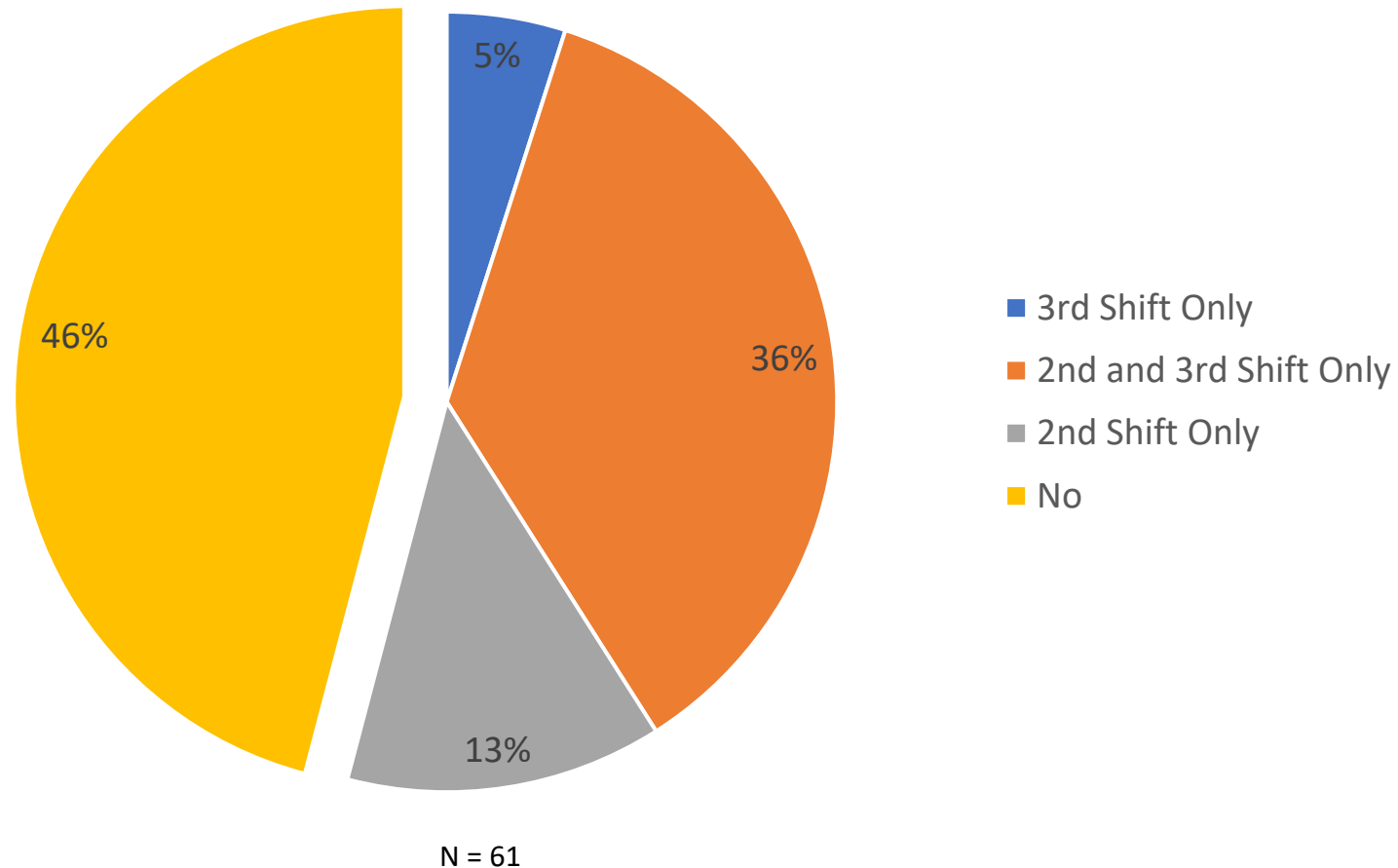
Percent of Firms with X Number of Shifts



Based on respondents, most firms (48%) offer 1 shift within their primary operations in the Charlotte Region. Following that, 21% of responding firms offer 3 shifts, 17% of firms offer 2 shifts, and 14% of firms offer more than 3 shifts.

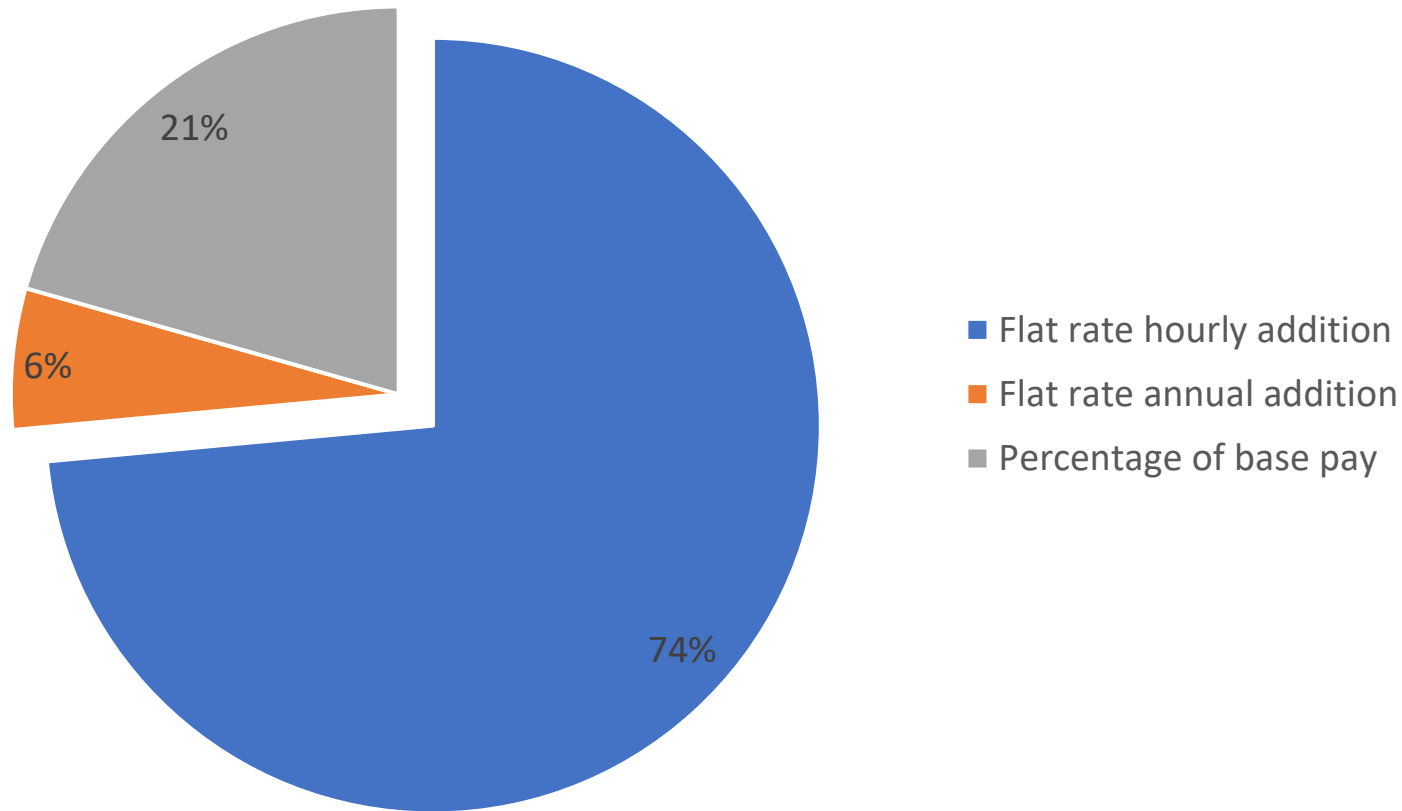
No respondents chose 'Other' as a response.

Are shift premiums offered?



Based on respondents, 46% of firms do not offer a shift premium. Following that, 36% of responding firms offer a shift premium only to the 2nd and 3rd shift, 13% offer it only to the 2nd shift, and 5% offer it only to the 3rd shift.

How are shift premiums offered?



N = 61

Based on respondents who offer a shift premium, most firms (74%) offer a flat rate hourly addition as their shift premium.

Following that, 21% of responding firms offer their shift premium as a percent of the base pay and 6% offer it as a flat rate annual addition.

How much is offered for each shift?

Shift Premium If Flat Hourly Addition

Shift	Average	Median	Min	Max
2nd Shift	2	1	0.1	2
3rd Shift	5	1	0.25	2
Other Shift	2	2	0	4

N = 7-23

See the table to the left for the average, median, minimum and maximum amount (USD) for shift premiums if they are given as flat hourly addition.

Due to insufficient data, values around shift premiums as a flat rate annual payment and percentage of base pay was removed.

Annual Turnover Rate

	Turnover Rate (%)
Average	15
Min	0
Max	50
Median	10
Mode	10

N = 62

Based on respondents, the average turnover rate, as a percentage of the workforce, is 15%.

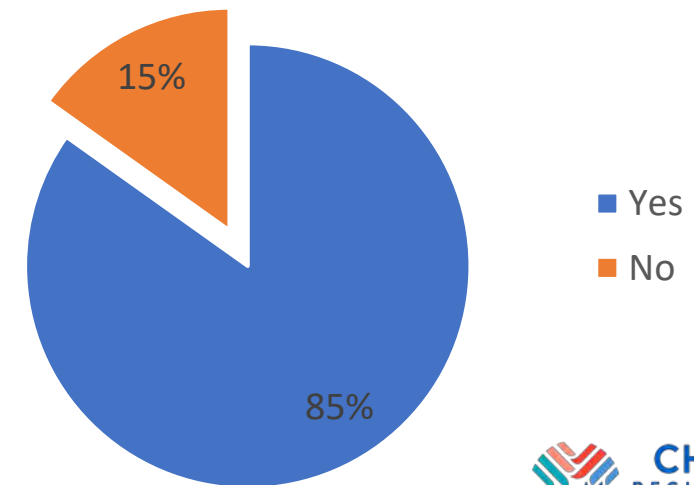
Reasons for Turnover

Rank	Reasons for Turnover
1	Attendance problems
2	Employee dissatisfaction
3	Other policy violations
4	Employer dissatisfaction
5	Employee advancement opportunity
6	Other personal reasons
7	Retirement
8	COVID-19 fears

N = 58

Based on respondents, the number one reason for turnover in production jobs is related to attendance problems.

If policy violations, attendance issues, employee dissatisfaction or other personal reasons are the motivator behind termination, 85% of respondents noted that employee counseling or retraining is offered (see chart below).



N = 66

Company Benefits and Perks

Are the following perks offered?

Perk/Benefit	Percentage
Employee Assistance Program	23%
Giveaways	24%
Employee picnics, barbeques, and other parties	40%
On-site childcare	1%
On-site laundry	3%
Other (please specify)	10%

N = 62

Based on respondents, the most common perk/benefit that's offered are employee parties like picnics and BBQs. The least common perk that is offered is on-site childcare.

For those who chose 'Other,' they noted that they provided perks including tuition reimbursement, discount programs, and wellness programs.

How many hours must employees work to qualify for benefits?

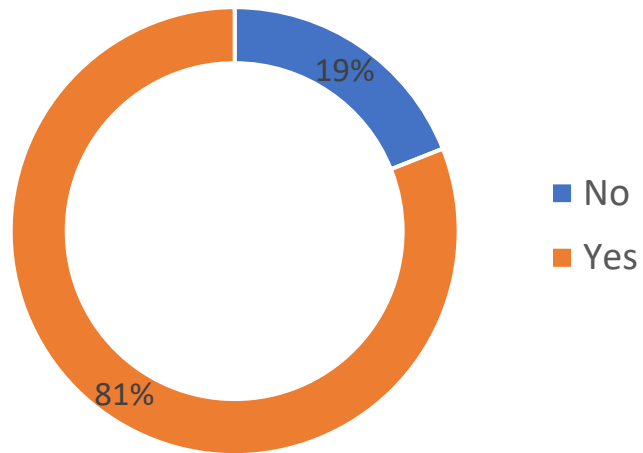
Amount of Hours	Percentage of Firms
0 - 9	12%
10-19	0%
20 - 29	6%
30 - 40	63%
41+	15%
No benefits are offered	4%

N = 68

Based on respondents, most firms (63%) require employees to work between 30 and 40 hours before they can qualify for company provided benefits.

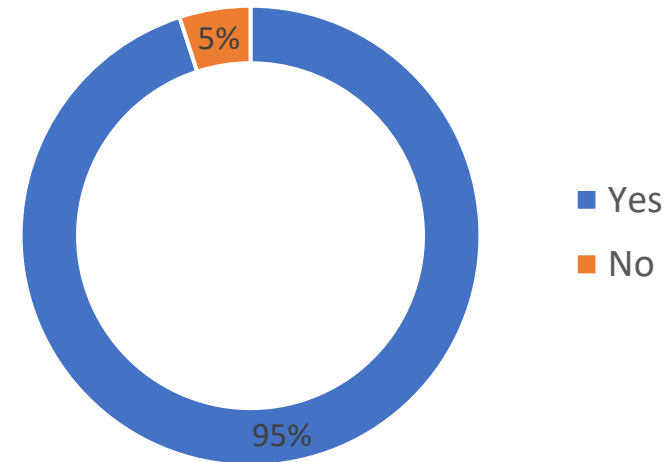
401 K Contributions (part 1)

Are 401k offered?



N = 70

Do you match employee contributions?



N = 56

81% of responding companies offer 401k and only 5% out of those do not match employee contributions.

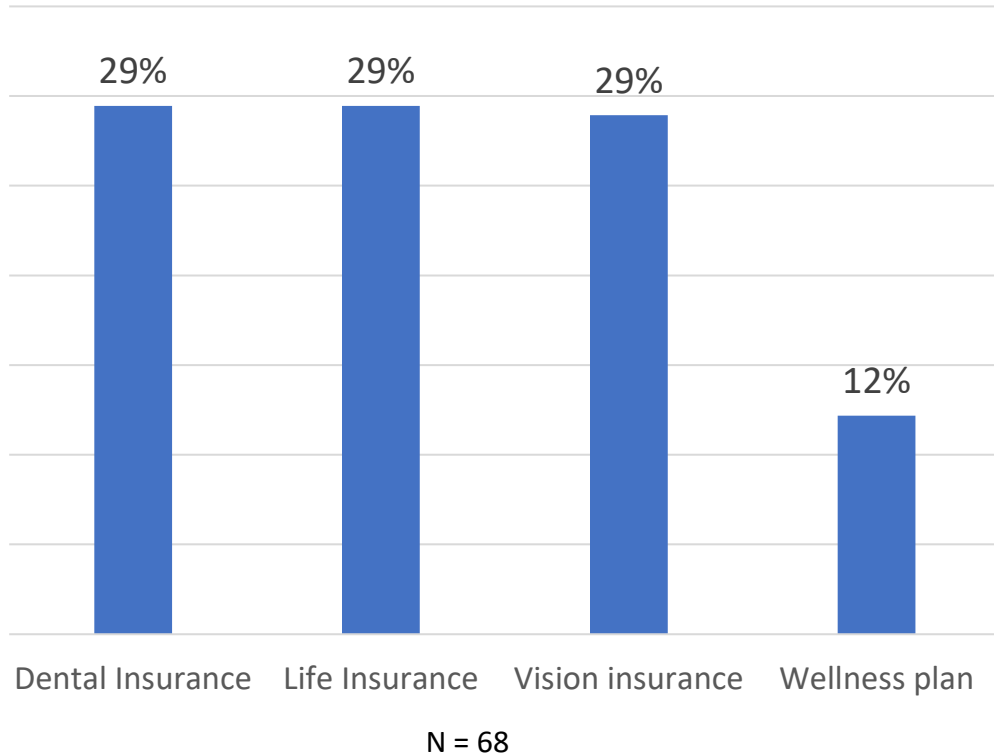
401 K Contributions (part 2)

Of responding firms offering a 401k match, the average amount base pay matched is 4.9% and ranges from 2% to 15%. The percentage of employee contributions matched ranges from 30% to 100% with a median of 55%.

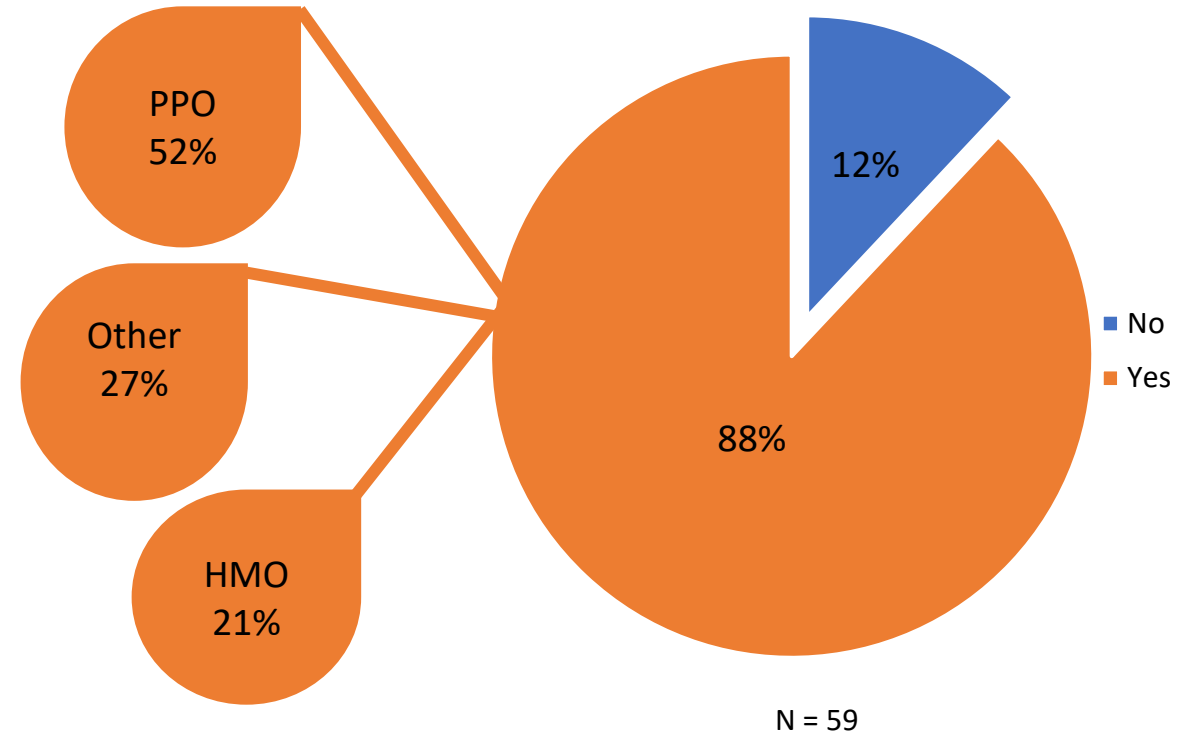
	Percentage of base pay matched	Percentage of employee contributions matched
Average	4.9%	64.5%
Median	4%	55%
Min	2%	30%
Max	15%	100%
	N=53	N=40

Insurance Benefits

Which of these benefits are offered?

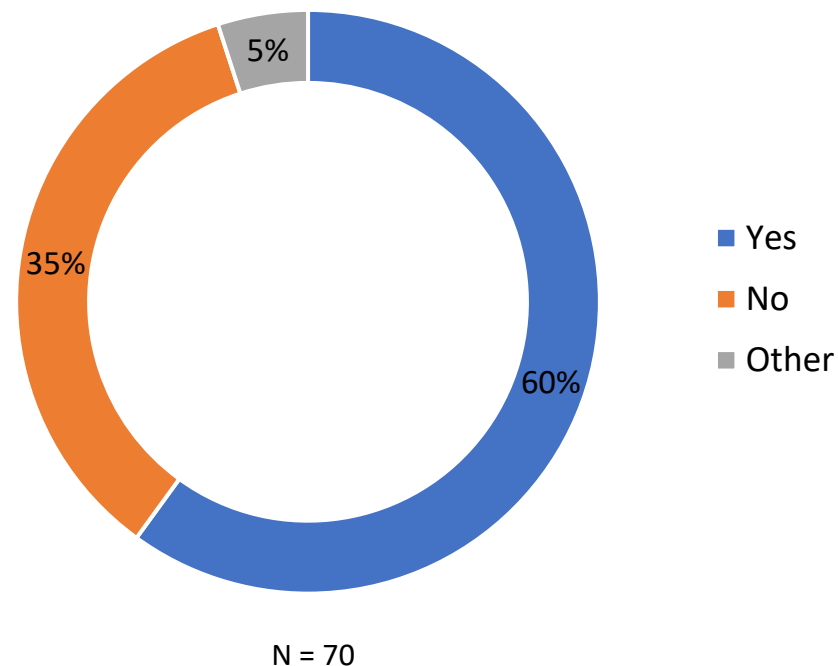


Is health insurance offered?



88% of responding companies offer **health insurance**. 52% report offering PPO plans, 21% offer HMO and 27% offer a combination of both and others. 29% of responding companies offer dental, vision, and life insurance. Only 12% of responding companies offer wellness plan.

Are employee referral bonuses offered?



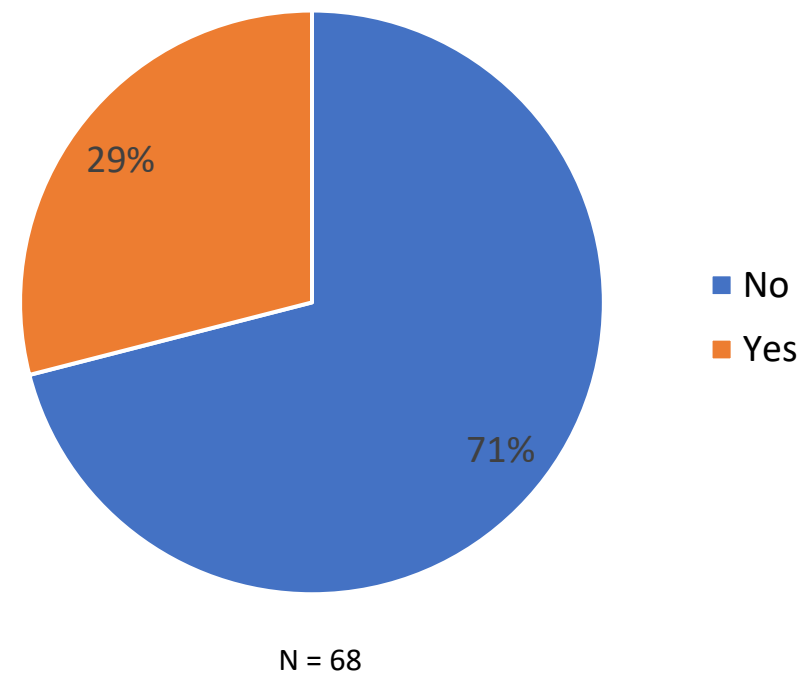
	Employee Referral Bonus
Average	\$554
Median	\$500
Max	\$2000
Min	\$50

N = 56

60% of employers reported offering an employee referral bonus. All responding companies offered bonus as a flat fee in the amount ranging from \$50 to \$2,000 with a median of \$500.

Length of Service Bonuses

Are length of service bonuses offered?



How much and when?

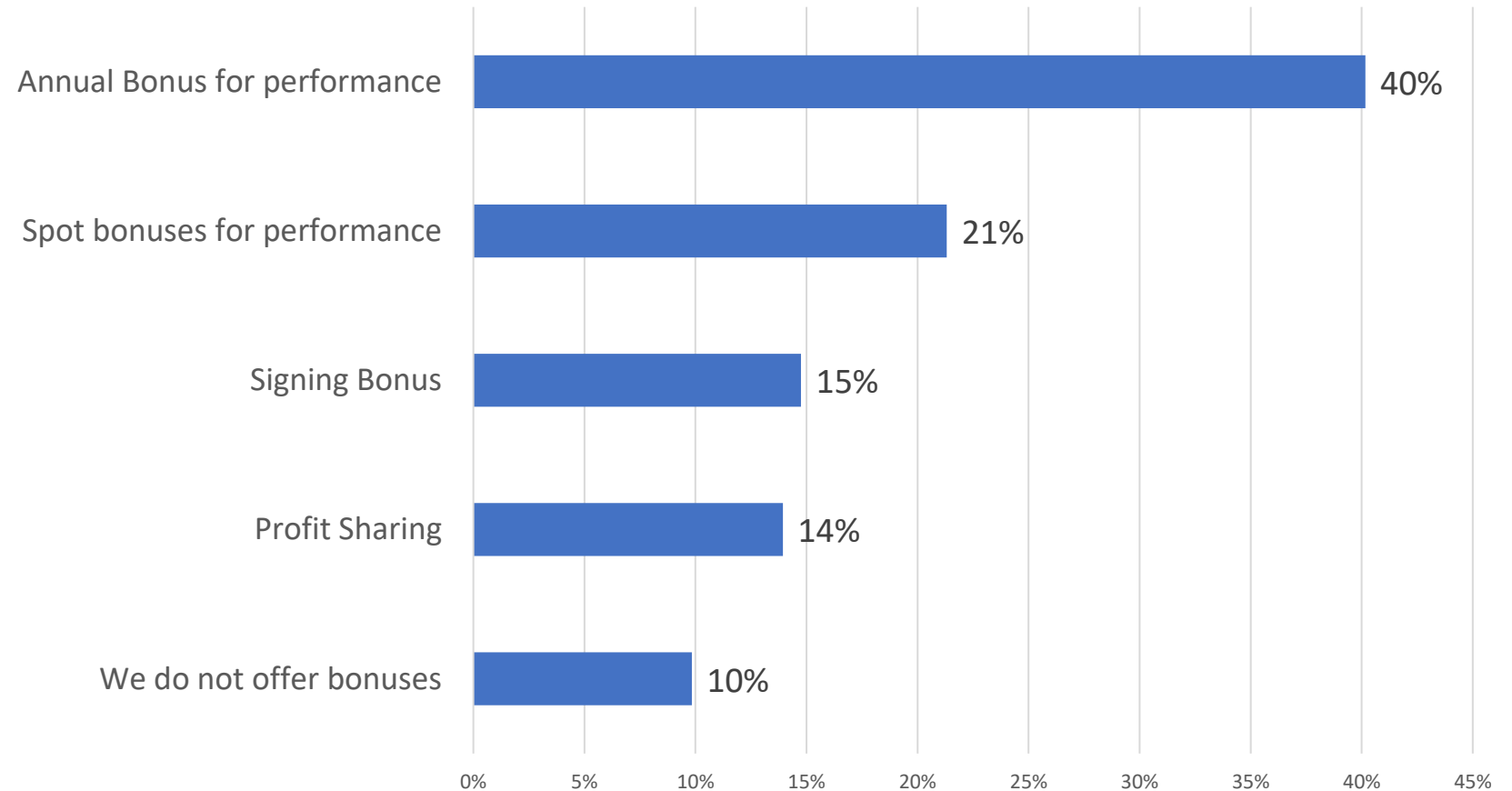
	None	\$0-\$99	\$100-\$500	\$500-\$1,000	More than \$1,000
90 days	60%	30%	0%	0%	10%
6 months	50%	25%	0%	13%	0%
1 year	22%	22%	44%	11%	0%
3 years	22%	0%	44%	33%	0%
5 years	0%	13%	44%	38%	6%
10 years	0%	0%	24%	41%	35%

N = 35

29% of employers offer length of service bonuses. Most companies, among respondents, offer a bonus ranging from \$100-\$500 at the 1-year mark up to 5 years.

What other types of bonuses are offered?

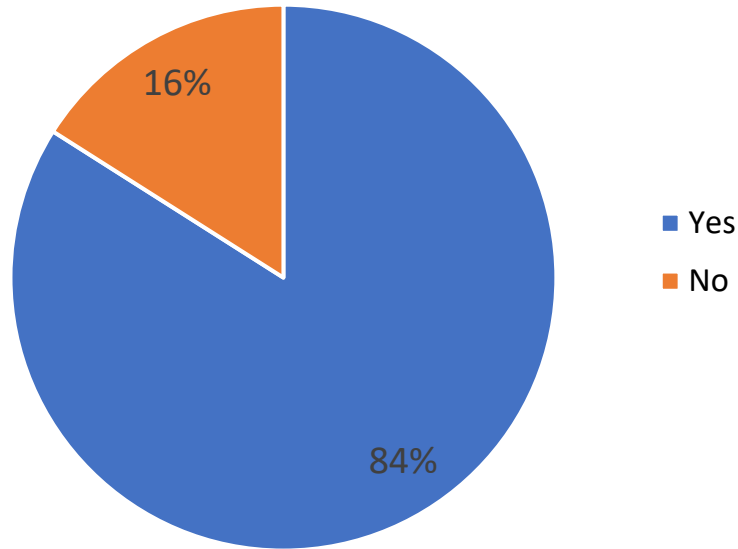
40% of responding employers offer annual bonus for performance. The next most common incentive offered is spot bonus for performance used by 21%.



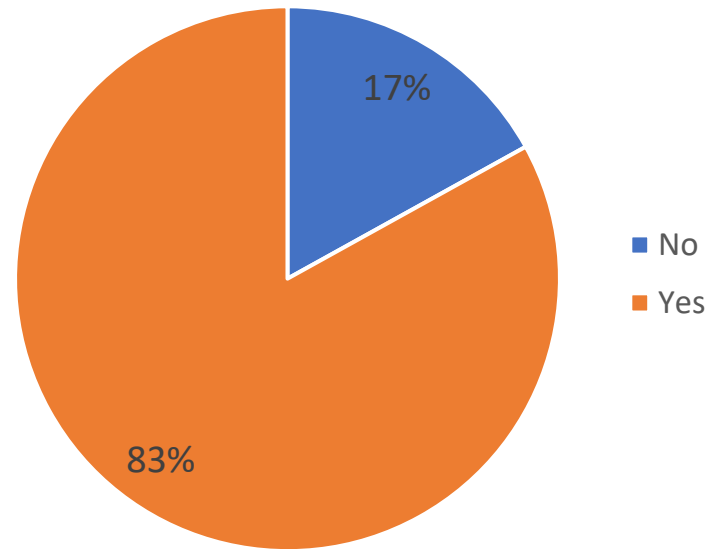
N = 70

Is paid time* off available?

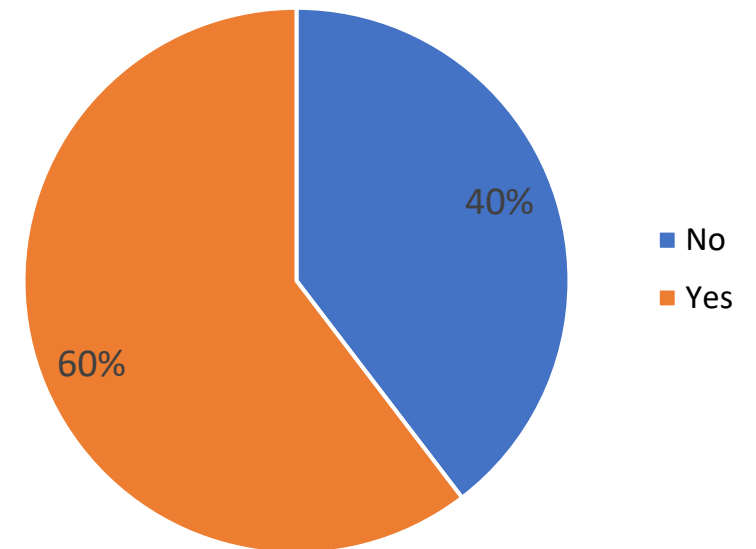
General PTO



Vacation



Sick Days

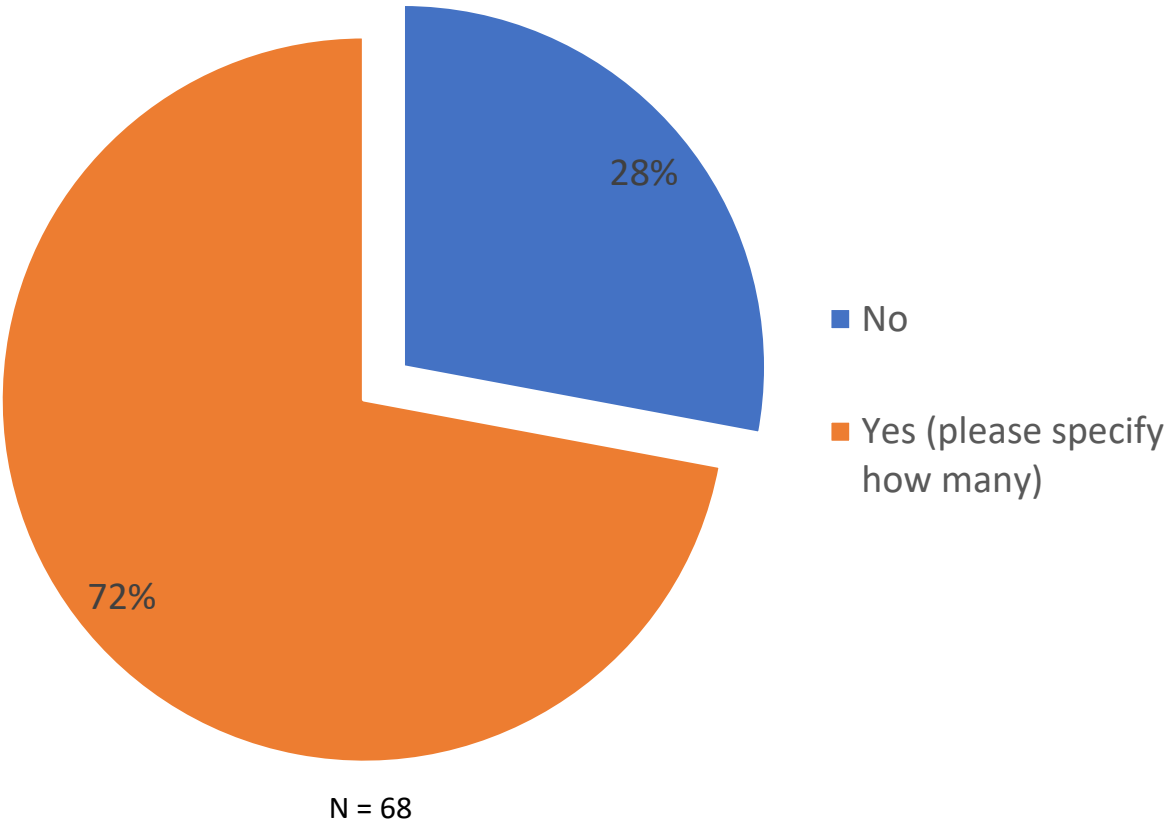


Days	Paid Holidays
0-3	4%
4-6	10%
7-9	51%
10 or more	34%

More than 80% of employers offer paid general PTO and vacation while 60% of employers offer paid sick days. 51% offer seven to nine paid holidays.

Hiring Challenges and Opportunities

Are there any unfilled positions?



Based on respondents, 28% of firms noted that they did not have unfilled positions.

Within our sample pool, many firms appear to have several unfilled positions, ranging from 1 to 125 positions. On average, a responding firm had 18 unfilled positions with a median of 6.

Average	18
Median	6
Min	1
Max	125

Training Needs

Training needs	Choice
Technical Training (CNC Machinists/ Forklift)	#1
Front-line supervisory/ management training	#2
Quality Training	#3
Analytics	#4
Critical Thinking/ Emotional intelligence	#5

N = 39

Technical training and front-line supervisory/management training are the top two most needed type of trainings followed by quality training, analytics and soft skills including critical thinking and emotional intelligence.

Challenges in Recruiting and Hiring

Ranking	Challenge
1	Not enough qualified candidates
2	Lack of hard skills/certifications
3	Lack of soft skills
4	Issues with background checks
5	Issues with drug tests

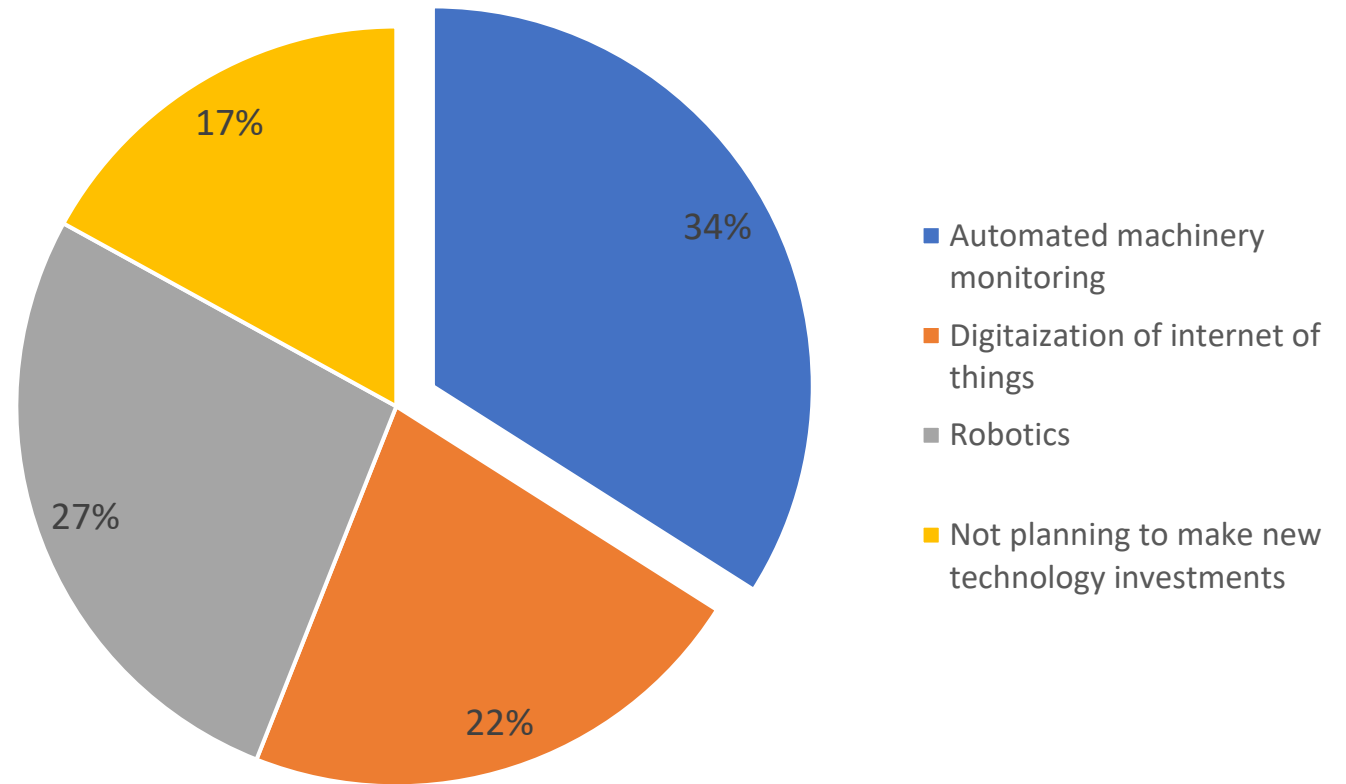
N = 53

Based on respondents, the top challenge in recruiting and hiring is not having enough qualified candidates.

Future Technological Investments

Based on respondents, automated machinery monitoring will be the most common future investment. Following that is robotics and then the digitization of IoT.

Of all responding firms, 17% have no plans on making new technology investments.



N = 64

Types of Training/Workforce Development

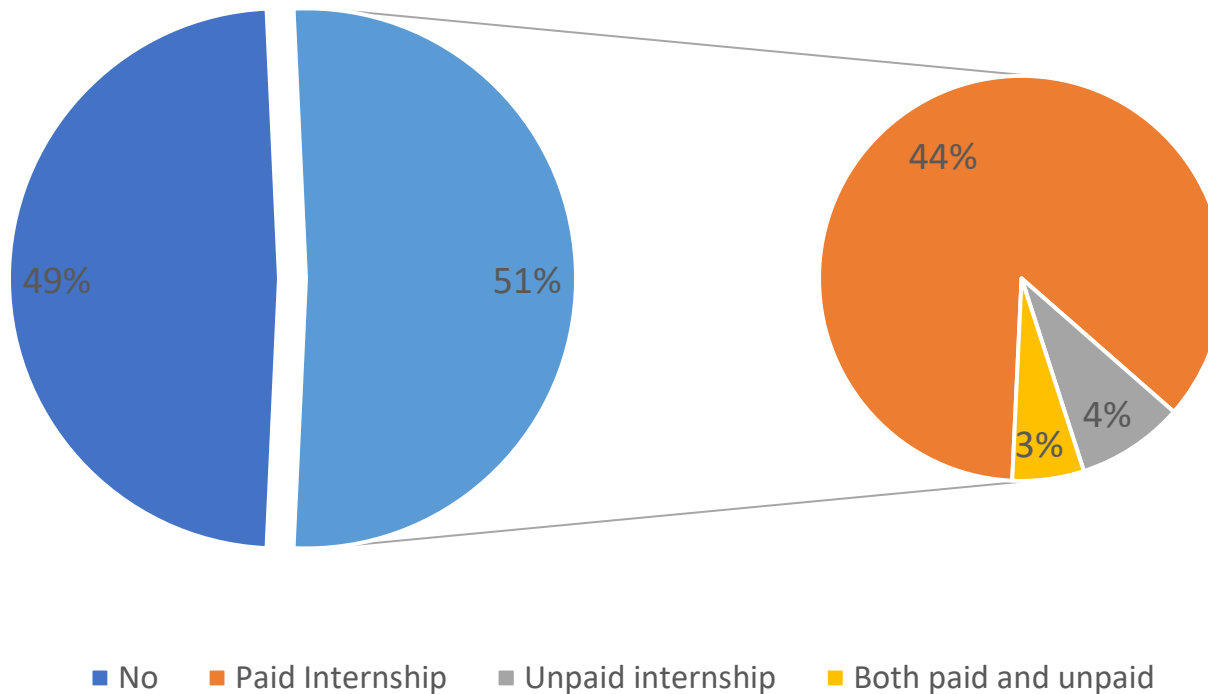
See right for the percentage of firms that have or have not used the specified training/workforce development tool.

For example: 38% of responding firms are currently using local community college customized training as their development tool.

	Yes, currently using	Yes, haven't used in the past	No, haven't used in the past	N
Local community college customized training	38%	34%	29%	56
Incumbent worker of on-the-job training	23%	38%	39%	56
Career ready certifications or work keys	14%	37%	49%	51
Apprenticeships	33%	28%	39%	54
Second chance hiring	27%	29%	43%	51

Internships

Share of Firms with Internships



N = 68

Based on respondents, over half of the firms offer some sort of internship.

Out of those respondents, most firms offer a paid internship. Based on those who don't offer internships, some reported that some type of internship has been discussed and/or are being developed.

Minimum* Required Education/Training for Production Jobs

Minimum Requirement	Average	Median	Min	Max
Less than a HS degree	37	23	0	100
HS degree	69	80	0	100
On-the-job training	70	100	0	100
Post HS certification	21	10	0	100
Associate's degree	14	6	0	70
Bachelor's degree or higher	12	10	0	50

N = 56

Based on respondents, on average, 70% of production jobs require on-the-job training, making it the most popular requirement.

*In percentages.

Is transportation an issue?

	Percent of Firms
Yes, transportation is an issue and we provide assistance	3%
Yes, transportation is an issue but we don't currently provide assistance	15%
No, transportation is not an issue for employees	76%
Other	6%

N = 67

Based on respondents, most firms (76%) said that transportation was not an issue for their employees.

Following that, 15% of responding firms said that it was an issue but they do not provide assistance while 3% said they did provide assistance.

Respondents also noted that public transportation and carpooling were popular amongst their staff for when transportation issues came up.

*In percentages.

Expectations of Retirement/Leaving the Workforce*

Timeline	Average	Median	Min	Max
Less than 1 Year	3	2	0	20
1 - 3 Years	7	5	0	50
3 - 5 Years	8	5	0	40
5 - 7 Years	11	7	0	50
7 - 10 Years	14	10	0	60
More than 10 Years	39	30	0	100

N = 47

Based on respondents, on average, firms believe that 3% of their workforce will retire or leave the workforce in less than a year. Additionally, on average, 39% are expected to retire or leave the workforce in more than 10 years.

*In percentages.

Current Impactful Public Policies

Policies	Local/ State/ National
Taxes and Incentives, COVID-19/ OSHA	Local, State & National
Industrial Development/ Construction (permits & fire code)	Local
Healthcare and Education	State
Supply Chain, Tariffs, EPA Regulations, Strict Immigration laws	National

N = 47

Policies related to taxes, incentives, and COVID-19 related measures and regulations remain responding companies' concerns at the local, state and national level. 33% of respondents mention national policies related to trade, supply chain, and immigration laws which do currently have an impact on their business.

For questions and comments, please contact the Charlotte Regional Business Alliance.



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