

# **Carteret County Economic Development Action Plan**



**2016 to 2021**

***A Blueprint For  
The Future***

051916 Draft



Rural Economic Development  
COMMERCE

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**“Planning is  
bringing the future  
into the present so  
that you can do  
something about it  
now.”**

**Alan Lakein**

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Photo courtesy Crystal Coast Tourism Development Authority

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## THE PROJECT OVERVIEW

In early 2014, the Carteret County Economic Development Council initiated a planning process focused on the broad economic development of Carteret County, North Carolina. A strategic Planning Committee consisting of local officials and members of the general public was organized to work the North Carolina Rural Economic Development Division to develop a plan that would guide Carteret County into the 21<sup>st</sup> Century.

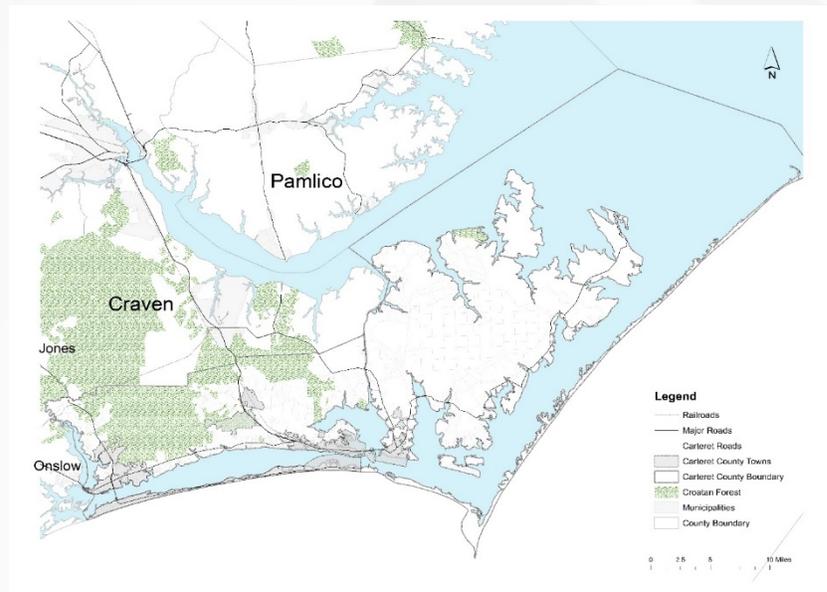
This project was co-coordinated by the Carteret County EDC, East Carolina University's Office of Innovation and Economic Development's Municipal Management Initiative, and representatives of the North Carolina Department of Commerce.

The overarching effort for Carteret County's economic road map and strategic planning began in 2013 with the analysis, crafting, and adoption of individual economic plans by the municipalities of Newport, Cedar Point, Cape Carteret, Emerald Isle, Pine Knoll Shores, Atlantic Beach, Morehead City, Beaufort, and the Down East area.

While the road to succeeding in the 21<sup>st</sup> Century may be arduous, the recent recession has strengthened the resolve of the EDC and County to work together to build a more robust and diversified economy. The economic roadmap for the next five years must be robust and agile enough to shift between immediate opportunities and longer-term positioning and placemaking. In essence, this plan will accomplish three key strategic-level objectives: 1) identify

opportunities for short-term job stimulus; 2) develop opportunities that position the County for sustained and economically diversified business and job growth (blue, gold, grey, pink, and white collar); and 3) develop the necessary (marine) Science, Technology, Engineering, Math (STEM) capacity in expertise and resources to train AND retain our Generations Y and Z to locally compete in a changing 21<sup>st</sup> Century global economy.

Map 1. Carteret County



## EXECUTIVE SUMMARY

In 2014, The Carteret County Economic Development Commission initiated a planning process focused on the broad economic development of Carteret County, North Carolina. A strategic Planning Committee consisting of local officials and members of the general public was organized to work with The North Carolina Rural Development Division's Rural Planning Center to develop a plan that would guide Carteret County into the 21st Century.

This project was co-coordinated by the Carteret County EDC and East Carolina University's Office of Innovation and Economic Development's Municipal Management Initiative and representatives of the North Carolina Department of Commerce.

## VISION

The Planning Committee identified the following vision for Carteret County in 2021:

*Carteret County will be known as a growing, thriving, community with vibrant coastal towns and a successful mainland City flanked by smaller mainland communities. User-friendly public parks and recreation facilities are readily accessible. Carteret County will become a leader in environmentally and socially sustainable growth. Its economy will include diverse types and sizes of businesses and wages will be steadily increasing.*

In order to fulfill this vision, and based on an analysis of the strategic position of the county, Carteret County will pursue a strategic direction summarized as follows: Seek a growing population, an increase in visitors, and growth in median wages, business revenue, and profit by focusing on 21st Century jobs, the healthcare sector, year-round tourism, a thriving port and a diverse retail sector. This strategic direction should be used as a guide or strategic filter as new opportunities arise throughout the plan's implementation period.

On an annual basis and prior to January 15 of each year the Carteret County Economic Development Council in conjunction with its staff and Board of Directors shall present to the County Commissioners a STATE OF THE COUNTY document that will address the Commissions accomplishments based on the prescribed goals.

The strategic direction is made operational through the following six goals, which are in turn further defined by objectives and major actions included in the plan. These goals are not ranked or prioritized.

### **1. Foster Economic Growth and Expansion of Existing Businesses**

Work with existing businesses to facilitate growth and expansion as well as recruit new business interests

### **2. Infrastructure Development and Enhancement**

Improve our roads and access to facilitate the movement of people and goods. Insure high-speed broadband service is available for a growing commercial sector

### **3. Support our Educational Processes**

Implement STEM training in schools and develop technology training and support facilities at Carteret Community College; expand nursing training and consider the addition of a physician's assistant program to service the growth in our retirement community

### **4. Business Recruitment**

Seek out businesses that are compatible with coastal environment and leverage our significant tourist exposure to attract desirable business

### **5. Workforce Development**

Improve our workforce by researching business needs and preparing our workforce to meet those needs both through our schools and community college

### **6. Promotion and Marketing**

Develop a brand for Carteret County and utilize that brand for the promotion of Carteret County to prospective business entities; support the concept of a millennial campus designation through the expansion of the NC State & UNC Marine Research Facilities and utilize that designation to enhance the marketing of Carteret County.



Photo courtesy Crystal Coast Tourism Development Authority

## PROCESS

This plan was developed as part of the Carteret County Economic Development Council's (EDC) Municipal Initiative project. The County Commissioners authorized the project and appointed an Economic Development Strategic Plan (EDSP) Committee, making sure that the major businesses, industries, cultural organizations and education institutions had been represented. The Committee diligently met every two weeks over the course of several months. Staff members from NC Rural Development Division, Rural Planning Center, served as meeting facilitators.

A process was devised to answer several key questions:

- Where are we now?
- Where are we going?
- How do we get there?

In order to answer these important questions, the EDSP Committee was guided through a SWOT (strengths, weakness, opportunities, threats) analysis which helped set the current climate in the County. A visioning exercise followed. Committee members were asked to envision their community in twenty years' time and to reflect on what they would like to see their community become.



*EDSP Committee at work*

Outreach to the community was the next step. In order to gather public input, the Steering Committee developed a survey that was made available through the County's website, EDC, Chamber of Commerce, and the towns' email lists. Simultaneously, the EDSP Committee identified a list of influential people from various business sectors throughout the County as stakeholders to be interviewed individually.

Information collected from the surveys and interviews was tabulated and presented to the Committee. Utilizing the data gathered from the SWOT analysis, visioning exercise, community survey and stakeholder interviews, the EDSP Committee identified several important issues on which the County could focus its efforts to improve the economic picture over the next several years. With assistance from the planning staff, the Committee conducted a prioritization exercise, the results of which serve as the cornerstone of this plan.

The EDSP Committee recommended the plan to the EDC and the County Commissioners on April 4, 2016. The EDC adopted the plan on May 19, 2016 and the County Commissioners adopted the plan during its \_\_\_\_\_, 2016 meeting.

## CITIZEN PARTICIPATION

The Economic Development Strategic Plan Committee made citizen participation a priority at the beginning of the planning process. The Committee used various techniques to get citizens and stakeholders involved in the process. After identifying key stakeholders in the community, the Committee conducted interviews to gauge opinions and perceptions about county services, community, economic development patterns, and quality of life. Also, the Committee developed and conducted a survey of participating residents and property owners in the County to identify what is important to the community.

The Committee developed an online survey and disseminated it by networking with the local media, Chamber of Commerce, local school system, and the towns. The survey included a section where respondents could add comments about things that were not addressed in the survey questions. The County received 1,204 responses.

The three key issues in the County, according to the survey are:

- **Continued K-12 education investment,**
- **Create financial incentives to develop and expand new businesses/industries,**
- **Identify and recruit knowledge-based and technology companies.**

A large percentage of the survey responses came from Emerald Isle, and also local teachers. After filtering these responses, along with looking at responses from Bogue Banks, the mainland, and the various age groups, the major issues were still similar across all filters.

Results of the filters can be found in Appendix 2.

### **Summary of 2015 County Survey responses:**

Of the 1,204 responses to the survey, almost 70% of the respondents were 50 years old or greater. The other 30% came from respondents that were 21 – 49.

Almost 60% were from respondents that identified as Carteret County homeowners. Another 27% were second homeowners, with the remainder of the responses coming from Carteret County renters and citizens that live elsewhere. Because of citizen participation, Emerald Isle represented 40% of the survey results.

When asked about their field of work, 27% of the respondents worked in Educational Services, 14% were retired, and another 11% worked in Public Administration/Government.

The top three identified greatest strengths of the County were:

- Water-based lifestyle;
- Natural beauty/green space;
- East Coast location.

Recent challenges and trends that affect the County were identified as:

- Property insurance rates;
- Offshore drilling;
- Beach nourishment.



Photo courtesy Crystal Coast Tourism Development Authority

Future opportunities were:

- Tourism-related;
- Marine sciences and aquaculture;
- Improved highway access.

When asked what will generate better paying jobs, respondents answered with:

- Health care;
- Technology;
- Tourism;
- Professionals working remotely;
- Defense-related businesses.

The top five responses to what the Economic Development Council, the County, and the towns could do to promote and foster the attraction, creation, and retention of better paying jobs were:

- Continued K-12 education investment;
- Creation of financial incentives to develop and expand new businesses;
- Identify and recruit knowledge-based and technology companies;
- Entrepreneur/small business development;
- Year-round high end tourism opportunities.

The survey responses identified the county's workforce development, training, and educational needs as:

- Grades 9-12 STEM (Science, Technology, Engineering, Mathematics) program;
- Technology training;
- Vocational training.

The top 3 advantages of the County were:

- Natural beauty;
- Crime rate;
- Access to parks and public space.

The top 3 disadvantages were:

- Access to arts, cultural, and entertainment opportunities;
- Public transportation;
- Affordable/Workforce housing.

*Stakeholder Interviews*

As previously mentioned, stakeholder interviews were also conducted. The Committee identified key individuals in the community in various fields and staff conducted one-on-one interviews with these individuals. Also, staff interviewed Committee members. The results of these interviews are:

1. What is distinctive about the county? What sets the county apart from other nearby counties?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Seasonal vacation destination</li> <li>• Shape and length of county</li> <li>• Location on the East Coast</li> <li>• Military presence</li> </ul>	<ul style="list-style-type: none"> <li>• Seasonal vacation destination</li> <li>• Shape and length of county</li> <li>• Military presence</li> <li>• “End of the Road”</li> <li>• Diverse socio-cultural/economic population</li> </ul>

What brings or keeps you here in Carteret County?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Water-based lifestyle</li> <li>• Quality of life</li> <li>• Slow pace/small town atmosphere</li> <li>• Low cost of living</li> </ul>	<ul style="list-style-type: none"> <li>• Water-based lifestyle</li> <li>• Quality of life</li> <li>• Slow pace/small town atmosphere</li> <li>• Low cost of living</li> </ul>

2. What are the county’s greatest strengths?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Natural resources</li> <li>• Good schools</li> <li>• Tourism</li> <li>• Military presence</li> </ul>	<ul style="list-style-type: none"> <li>• Natural resources</li> <li>• Good schools</li> <li>• Tourism</li> <li>• Military presence</li> <li>• State Port</li> <li>• Marine sciences</li> </ul>

3. What are the recent external changes and trends (things that the county does not have much control of) that you think will have the greatest impact on the community over the next 5 years?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• State legislature</li> <li>• Offshore drilling exploration</li> <li>• Federal regulations (turtles, fish, birds)</li> <li>• Dredging and beach renourishment funding</li> <li>• Insurance rates</li> <li>• Military downsizing</li> </ul>	<ul style="list-style-type: none"> <li>• State legislature</li> <li>• Offshore drilling exploration</li> <li>• Federal regulations (turtles, fish, birds)</li> <li>• Dredging and beach renourishment funding</li> <li>• Insurance rates</li> <li>• Military downsizing</li> </ul>

4. What do you see as the single greatest challenge facing the county in the future (more than 5 years from now)?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Dredging of inlets and waterways</li> <li>• Providing jobs for young people</li> <li>• Dependent on military presence</li> <li>• Infrastructure to support growth</li> </ul>	<ul style="list-style-type: none"> <li>• Dredging of inlets and waterways</li> <li>• Providing jobs for young people</li> <li>• Dependent on military presence</li> <li>• Access to and from the county (Hwy 70)</li> <li>• Military downsizing</li> </ul>

5. What future opportunities do you think the county has (more than 5 years from now)?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• State Port expansion</li> <li>• Marine sciences/trades</li> <li>• Eco-tourism</li> <li>• Attracting tech businesses</li> </ul>	<ul style="list-style-type: none"> <li>• State Port expansion</li> <li>• Marine sciences cluster</li> <li>• Remote employment for tech jobs</li> <li>• Small business development</li> </ul>

What do you think would improve the quality of life in the county?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Better paying jobs</li> <li>• More young people (20-40 year olds) living here</li> <li>• More cultural and arts opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• More year-round employment</li> <li>• Change in state Tier System</li> <li>• More activities for resident families</li> </ul>

6. What type commercial development/small businesses are suitable in the county?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Tech businesses</li> <li>• Marine sciences/trades</li> <li>• Water-based tourism</li> <li>• Professionals working remotely</li> </ul>	<ul style="list-style-type: none"> <li>• Tech businesses</li> <li>• Marine sciences/trades</li> <li>• Marine science cluster</li> <li>• Service-driven</li> </ul>

7. What is one thing that the County could do to create better paying jobs?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Infrastructure improvements (water, sewer, broadband, road, rail)</li> <li>• More small business development</li> <li>• Identify sectors to target</li> </ul>	<ul style="list-style-type: none"> <li>• Infrastructure improvements (water, sewer, broadband, road, rail)</li> <li>• Recruit tech companies/professionals working remotely</li> <li>• Non-tourism jobs</li> <li>• Ensure school system remains at or stays near the top</li> </ul>

8. What are the County's workforce development, training and educational needs?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Engineering school or program</li> <li>• Nursing program</li> <li>• Marine trades training</li> <li>• More technology training</li> </ul>	<ul style="list-style-type: none"> <li>• Good community college</li> <li>• Vocational training</li> <li>• Basic training in marine technology/trades</li> <li>• Medical services</li> </ul>

9. Based on YOUR knowledge of the county and its programs and services, what is your perception or image of the county?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• NIMBY-ism</li> <li>• County meets needs of residents</li> <li>• Infrastructure improvements needed</li> </ul>	<ul style="list-style-type: none"> <li>• County is doing a good job</li> <li>• EDC doing a good job</li> <li>• County needs to upgrade facilities</li> </ul>

10. In your opinion, how is the county viewed by the businesses located in the county?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Business-friendly</li> <li>• Biggest challenge is infrastructure expansion</li> <li>• Need to pay more attention to expand existing businesses</li> </ul>	<ul style="list-style-type: none"> <li>• Business-friendly</li> <li>• Need to pay more attention to expand existing businesses</li> <li>• Not focused on middle income jobs</li> </ul>

11. In your opinion, how is the county viewed by other organizations (i.e. towns, nearby counties, state, federal government) with whom you collaborate?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Towns have good relationship with the County in regard to economic development</li> <li>• Good working relationship with neighboring counties</li> <li>• Interlocal agreements would help</li> <li>• Good relationship with military</li> </ul>	<ul style="list-style-type: none"> <li>• Towns have good relationship with the County in regard to economic development</li> <li>• Good working relationship with neighboring counties (Carteret and Onslow have good working relationship)</li> </ul>

12. How could the County improve its communication and outreach to local citizens?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>• Public Information Officer</li> <li>• Social media</li> <li>• Newsletters</li> <li>• County needs to highlight results of economic efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Public Information Officer</li> <li>• Social media</li> <li>• Newsletters</li> </ul>

13. What is your vision of the County in the next 20 years?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>Continued strong tourism industry</li> <li>More high-density development</li> <li>Science/tech hub</li> <li>Continue to press for Hwy 70 improvements</li> </ul>	<ul style="list-style-type: none"> <li>Continued strong tourism industry</li> <li>More high-density development</li> <li>Protect natural resources</li> <li>A year-round economy</li> <li>Opportunities for young people to live and work</li> </ul>

14. What didn't we ask you that we should have?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>Improve and maintain infrastructure</li> <li>Need change in Tier system</li> <li>More jobs to keep 20-30 year olds in the county</li> </ul>	<ul style="list-style-type: none"> <li>Improve and maintain Infrastructure</li> <li>Need change in Tier system</li> <li>More jobs to keep 20-30 year olds in the county</li> <li>More focus on growing and expanding existing businesses</li> <li>State Port needs to be discussed</li> </ul>

15. Do you have any other comments or suggestions that will aid the County in its planning efforts?

Committee Stakeholders	Community Stakeholders
<ul style="list-style-type: none"> <li>Affordable housing gap</li> <li>Need buy-in of local officials</li> <li>Take advantage of recent retirees to engage in economic development</li> </ul>	<ul style="list-style-type: none"> <li>Increase local funding for schools</li> <li>Keep planning efforts active</li> <li>Maintain small town atmosphere</li> <li>Carteret County is not isolated; greatly dependent on the economic health of eastern North Carolina</li> <li>Increasing Port business brings needs for improving transportation</li> </ul>

The survey responses and stakeholder interviews, along with the other methods of public participation, provided valuable information that assisted Committee members in identifying major issues and setting goals.



Photo courtesy publicradioeast.org

## CURRENT SITUATION

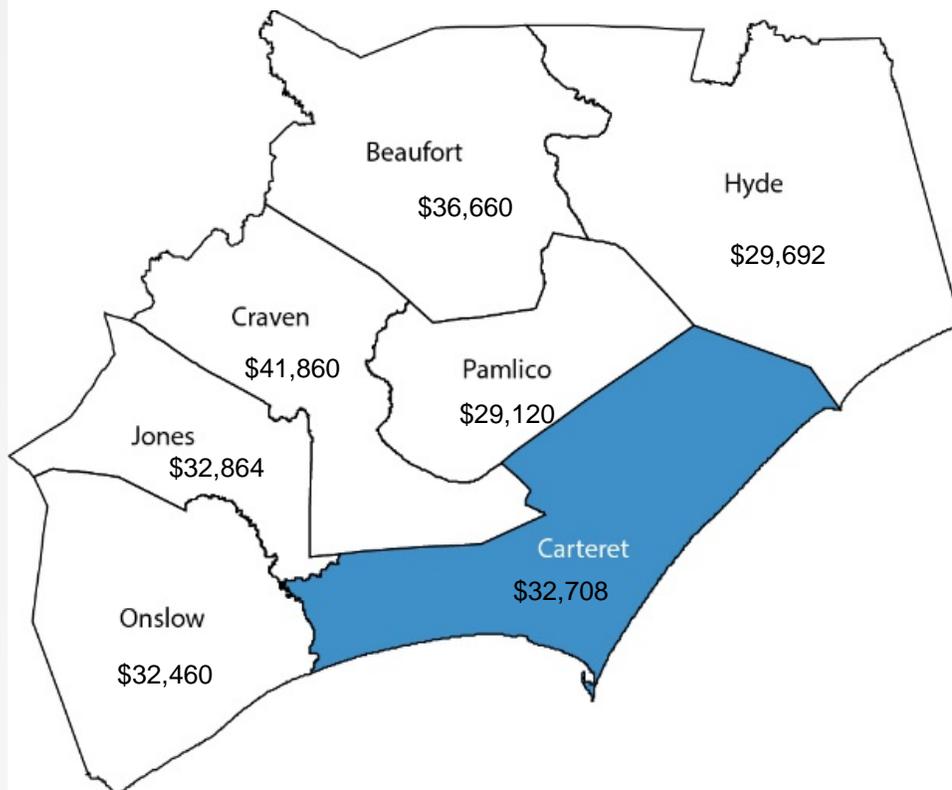
Carteret County's economy presents a variety of opportunities and challenges to those crafting economic development strategy. For instance, the county is highly dependent on three primary industries, all of which are growing:

- 1) Retail Trade;
- 2) Accommodation and Food Services; and
- 3) Health Care and Social Assistance.

Yet, while the Construction and Manufacturing industry sectors represent smaller employment footprints in Carteret County, their job losses since 2007 have been significant for the regional economy.

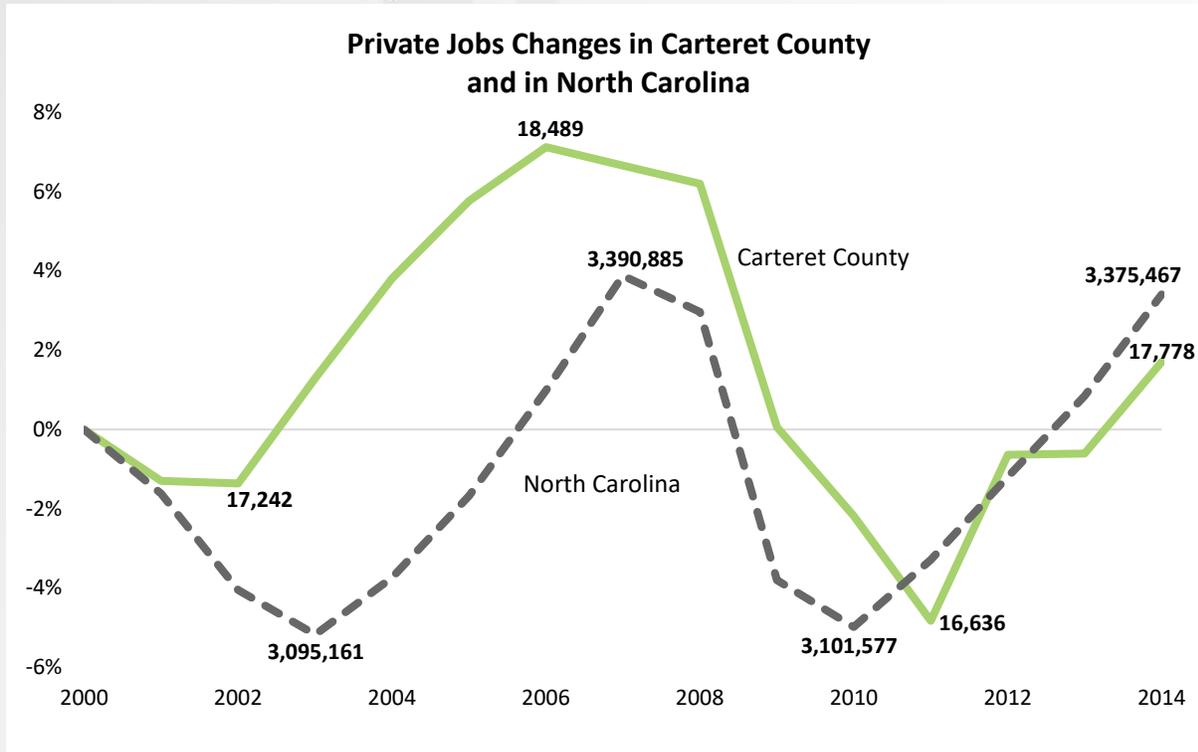
In 2014, North Carolina's Average Annual Wage was \$46,280, compared to Carteret County's Average Annual Wage of \$32,708. Our goal is to move Carteret County closer to the State average and better prepare to succeed in the 21<sup>st</sup> Century.

**Map 2. Central Coastal Counties and Average Annual Wages (2015)**



**Source:** NC Commerce, LEAD, OCEW

## Jobs in Carteret County



**Source:** NC Commerce, LEAD, QCEW

Since 2000, private industry job changes in Carteret County have roughly mirrored private industry job changes across North Carolina. Job losses coming out of the recession of 2001 were not as severe in Carteret County as in North Carolina as a whole.

In addition, Carteret County's recovery from that recession happened more quickly and in stronger fashion than North Carolina's recovery. The Great Recession (which officially began in late 2007) then had significant downward impact on the jobs picture in both Carteret County and the state. However, since bottoming out in 2010, North Carolina's job market has outperformed Carteret County.

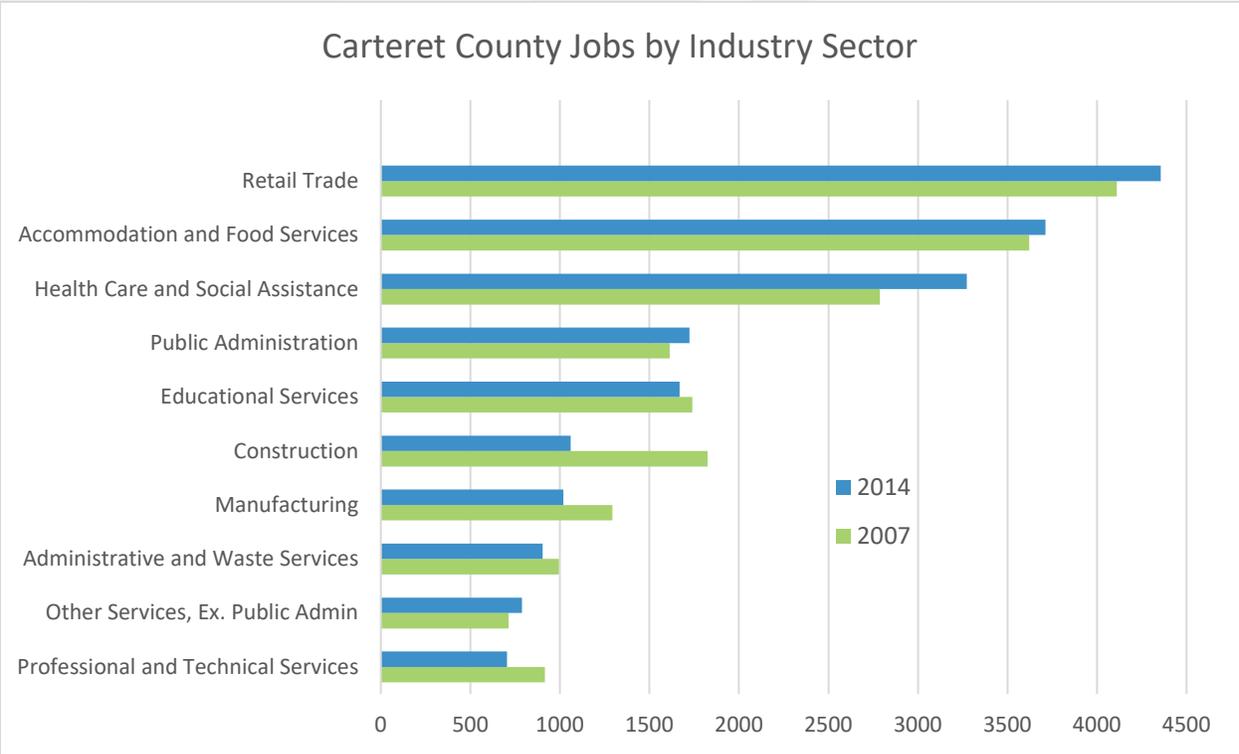


Photo courtesy carteretcountync.gov

## Industry Mix

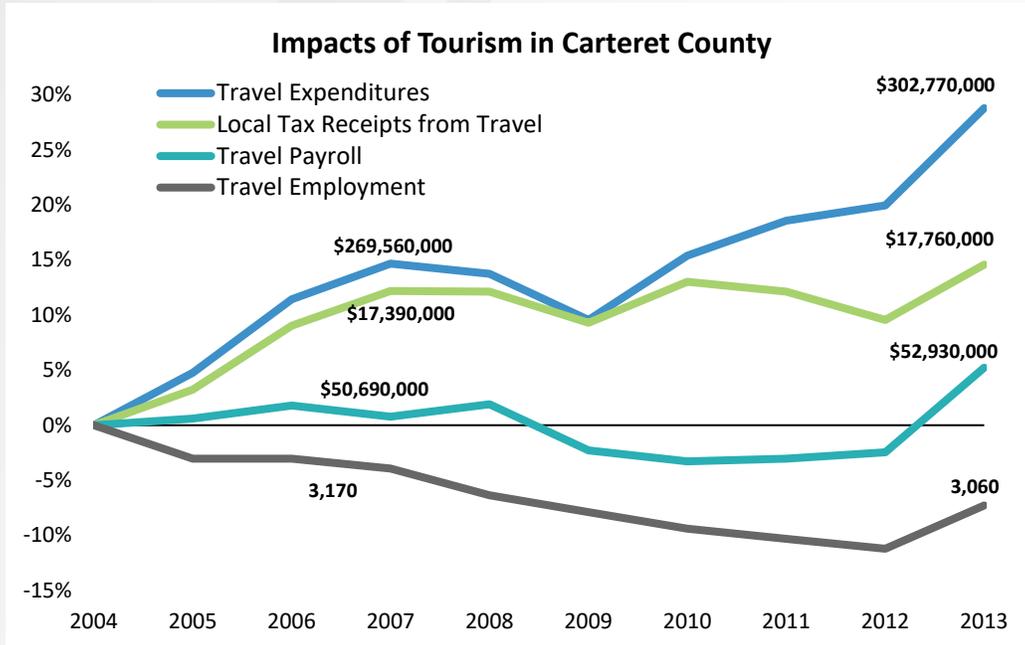
In 2014, three industry sectors made up 51% of Carteret County's total jobs: 1) Retail Trade (4,356 jobs); 2) Accommodation and Food Services (3,712 jobs); and 3) Health Care and Social Assistance (3,272 jobs). All three sectors included more jobs in 2014 than in 2007. Construction and Manufacturing have not fared so well since the Great Recession, having lost over 1,000 combined jobs since 2007.

According to Census data from 2013, the two industries in which Carteret County's jobs are most concentrated (Retail Trade and Accommodation/Food Services) also have relatively high job turnover rates, suggesting that individuals tend to hold these positions for relatively short periods.



## Tourism

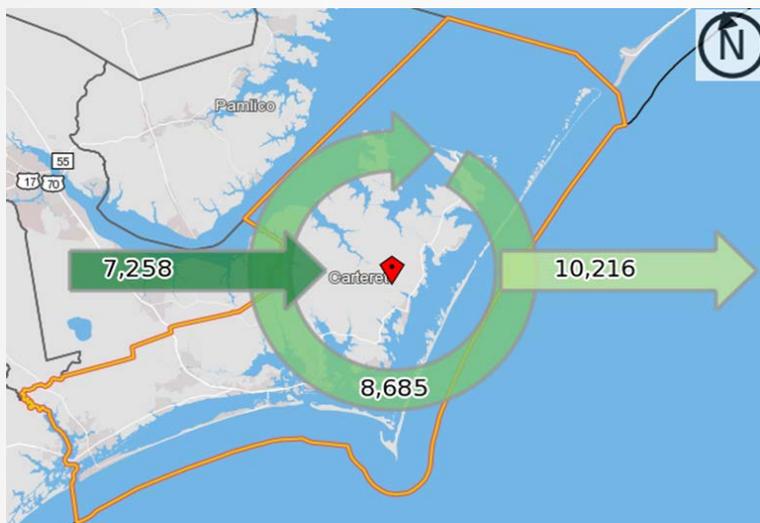
Carteret County's travel and tourism data illustrates a mixed picture for this portion of the county's economy. Travel expenditures and local tax receipts from travel have climbed over the last decade. However, travel-related payroll has remained fairly stable and travel-related employment has fallen.



Source: Log Into North Carolina (LINC), NC Department of Commerce data

## Commuting Patterns

Based on the Census Bureau's most recent commuting pattern data (2011), 8,685 Carteret County residents work in the county, while another 10,216 Carteret residents commute out of Carteret for work. Among those commuting out of Carteret, 18% commute to Craven, 15% commute to Onslow, and 8% commute to Pitt.



Where Carteret County Residents Work	
	2011 Jobs
Carteret County	8,685
Craven County	1,866
Onslow County	1,564
Pitt County, NC	859
All Other Locations	5,927
<b>Total</b>	<b>18,901</b>

Source: U.S. Census Bureau, LEHD, OnTheMap

Another 7,258 non-residents commute into Carteret County for work. Among those commuting into Carteret, 20% commute from Craven and 17% commute from Onslow.

### Top Employers

Carteret County's Top 10 Employers		
2014 4th Quarter		
	Company Name	Employment Range
1	Carteret County Board Of Education	1,000+
2	Carteret County General	500-999
3	County Of Carteret	500-999
4	Wal-Mart	250-499
5	Food Lion	250-499
6	Carteret Community College	250-499
7	Lowes Home Centers	250-499
8	Big Rock Sports	250-499
9	N.C. Dept. of Environment & Natural Resources	100-249
10	Lowes Food Stores	100-249

Source: NC Commerce, LEAD, QCEW  
Largest Employers



Photo courtesy Crystal Coast Tourism Development Authority

### Self-Employment

Estimated Self-Employment in Carteret County			
Industry Sector	2007 Jobs	2015 Jobs	% Change
Construction	966	728	-25%
Other Services (except Public Administration)	365	382	5%
Administrative and Support Services	280	245	-13%
Professional, Scientific, and Technical Services	215	214	0%
Crop and Animal Production	240	189	-21%
Retail Trade	194	183	-6%
Real Estate and Rental and Leasing	195	171	-12%
Health Care and Social Assistance	136	117	-14%
Arts, Entertainment, and Recreation	78	74	-5%
Accommodation and Food Services	57	69	21%
Educational Services	39	49	26%
Transportation and Warehousing	77	45	-42%
Finance and Insurance	48	41	-15%
Manufacturing	84	41	-51%
Wholesale Trade	38	34	-11%
Information	24	15	-38%
<b>Total</b>	<b>3,036</b>	<b>2,597</b>	<b>-14%</b>

Source: Economic Modeling Specialists Intl.

## GOALS, OBJECTIVES, AND ACTIONS

The *goals*, *objectives*, and *actions* refer to the following definitions:

Goals...

...are general guidelines that explain what you want to achieve – they are usually long-term and represent global visions, such as “grow the local economy”

Objectives...

...define strategies or implementation steps to attain the identified goals. Unlike goals, objectives are specific, measurable, and have a defined completion date

Actions...

...often, each objective is associated with a series of actions. Therefore, implementing a strategic goal typically involves implementing a series of actions along the way

## GOAL #1: FOSTER ECONOMIC GROWTH AND EXPANSION OF EXISTING BUSINESSES

*Objective #1.1: Identify local businesses that have expansion potential*

*Objective #1.2: Identify all available commercial structures*

*Objective #1.3: Evaluate workforce availability, quality, and potential training needs*

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
Face to face contact (at least 10 contacts per month) with all local businesses	EDC Director	X	Include in January State of the County presentation to County Commissioners	Include in January State of the County presentation to County Commissioners	Include in January State of the County presentation to County Commissioners	EDC Director & Staff
Identify individual business' needs	EDC Director	X	Summarize in State of the County presentation	Summarize in State of the County presentation	Summarize in State of the County presentation	EDC Director & Staff
Prepare inventory of all available properties	EDC Director & Staff	X	Annual review and present in State of the County	Annual review and present in State of the County	Annual review and present in State of the County	EDC Director & Staff Real Estate companies
Identify assets for each available property	EDC Director & Staff	X	Annual review and update	Annual review and update	Annual review and update	EDC Director & Staff, Real Estate companies Local Gov't & Utilities
Identify current government regulations regarding site uses	EDC Director & Staff	X	Annual review and update	Annual review and update	Annual review and update	Local Building Inspections and Planning Depts
Complete a detailed workforce analysis	EDC Director, Staff, & Professional Consultants	X	Annual review and include in State of the County	Annual review and include in State of the County	Annual review and include in State of the County	Federal, State & Local Statistics

## GOAL #2: DEVELOP INFRASTRUCTURE

*Objective #2.1: Support transportation enhancements*

*Objective #2.2: Improve broadband services to strategically determined corridors*

*Objective #2.3: Insure adequate water and wastewater treatment to insure retention of existing businesses as well as attract new businesses*

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
<b>Develop route protections to insure path for Bridges Street extension</b>	Carteret County & Morehead City	X	Status Updates & include in State of County Document	Status Updates & include in State of County Document		Planning & Zoning Depts.
<b>Actively encourage NCDOT to move up the project to widen Newport River Bridge to 4 lanes on the STIP</b>	Beaufort, Morehead City, NC Port, Legislature, NCDOT, Down East RPO	X	Status Updates & include in State of County Document	Status Updates & include in State of County Document	Right-of-way Acquisition Status included in State of the County	NCDOT, NC Port
<b>Develop corridor protections for New Hwy 70 extension from Havelock Bypass to NC Port</b>	Beaufort, Morehead City, NC Port, Legislature, NCDOT, Down East RPO	X	Status Updates & include in State of County Document	Status Updates & include in State of County Document	Status Updates & include in State of County Document	Planning & Zoning Depts., NCDOT, Hwy70 Corridor Commission
<b>Support railroad relocation to follow new Hwy 70 extension from Havelock Bypass to NC Port</b>	NC Railroad, NC Port, NCDOT, Legislature, Down East RPO	X	Status Updates & include in State of County Document	Status Updates & include in State of County Document	Status Updates & include in State of County Document	NC Railroad, NCDOT, NC Port, Legislature
<b>Develop &amp; implement a Broadband Authority</b>	EDC & County Commissioners	X	Operational with Charter presented in State of County Document	Status Updates & include in State of County Document	Status Updates & include in State of County Document	Time-Warner, Century Link, Private entities
<b>Develop Gigabit Ethernet service within recognized commercial corridor</b>	Broadband Authority And EDC	X	25% Completed	60% Completed	100% Completed	Time-Warner, Century Link, Private entities
<b>Map existing and future utility service</b>	EDC, Municipal & Private Utility Operators	X	100 % Completed	Report in State of the County	Report in State of the County	Municipal & Private Utility Operators

### GOAL #3: SUPPORT OUR EDUCATIONAL PROCESSES

*Objective #3.1: Insure that our students are being adequately prepared for the jobs of the 21<sup>st</sup> Century*

*Objective #3.2: Implement and increase STEM programs in K-12 and the Community College*

*Objective #3.3: Insure that our community college is actively supporting our existing and expanding medical presence*

*Objective #3.4: Provide a path to a better future for the students who are not traditionally college-bound*

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
Implement STEM programs in schools beginning with 5th grade	Carteret County Commissioners, County School Board	Implement in 5th-8th grade in 2017	Implement in 8th-12th grade 2017-2018 school year	Document increased support	Enhance existing programs	East Carolina, NC State, other education sources
Establish 9 – 12 public Carteret School of Engineering	County School Board	Implement by Jan 2018	Evaluate results in State of County Document	Evaluate results in State of County Document	Evaluate results in State of County Document	East Carolina, NC State
Implement technology training center at Community College	Carteret Community College Board	Implement by Jan 2017	Evaluate results in State of County Document	Evaluate results in State of County Document	Evaluate results in State of County Document	Universities and Private Sources such as the Kauffman Foundation
Expand medical programs in nursing and physicians' assistant programs	Carteret Community College Board	Begin nursing expansion in 2017	Add physicians' assistant program in 2018	Document results	Further expand these programs if need is growing	Carteret Health Care, ECU, UNC Hospital System, area hospitals
Enhance vocational and trades programs at Community College and insure preliminary student preparation in high school	Carteret County School Board, Carteret Community College Board	X	Evaluate results in State of County Document	Evaluate results in State of County Document	Evaluate results in State of County Document	Carteret Community College and County School Board
Increase teacher supplements to meet regional averages for teacher pay	County School Board	Implement by 2018	Evaluate results in State of County Document	Evaluate results in State of County Document	Evaluate results in State of County Document	County Commissioners

## GOAL #4: BUSINESS RECRUITMENT

*Objective #4.1: Identify community assets*

*Objective #4.2: Develop a targeted recruiting program*

*Objective #4.3: Complete an inventory of all vacant structures*

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
Identify community assets	EDC, County Commissioners, Chamber of Commerce & TDA	X	Annual review and update and include in State of the County Document	Annual review and update	Annual review and update	EDC, Real Estate Brokers, TDA, Chamber of Commerce
Develop a targeted recruiting plan based on community assets	EDC Director and EDC Board	Initial plan outline by end of 2016	Initial plan presented in January State of the County Document	Annual review, update in State of the County Document	Annual review, update in State of the County Document	EDC Director and EDC Board
Inventory all available structures and sites complete with available assets and list on Access NC and NC East Alliance websites	EDC Director & Staff	Preliminary inventory due end of 2016	Progress report in State of County Document and Final inventory complete by July 2017	Annual review, update in State of the County Document	Annual review, update in State of the County Document	EDC sites survey, Real Estate brokers, owners of vacant but non-listed sites
Redesign EDC website to more accurately describe available properties & assets to highlight the County's assets	EDC Director & Staff, and private media consultant	X	Progress report in State of County Document and Website complete by July 2017	Annual review, update in State of the County Document	Annual review, update in State of the County Document	Research other EDC websites for comparison, and interviews with media consultants
Create a local "certified site" program	EDC Director & Staff	Draft proposal by March 2018		Progress report in State of County Document and Website complete by March 2018	Annual review, update in State of the County Document	Research with NC Commerce, NC East Alliance

**GOAL #5: WORKFORCE DEVELOPMENT**

*Objective #5.1: Identify the workforce needs of existing businesses as well as recruitable 21<sup>st</sup> Century jobs*

*Objective #5.2: Insure community college and schools are in tune with these discovered workforce needs*

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
<b>Poll all local businesses to determine workforce needs</b>	EDC Director, EDC Staff	Preliminary results due end of 2016	Progress report in State of County Document and Final results complete by July 01, 2017	Continued evaluation report in State of County Document	Continued evaluation report in State of County Document	Local Business Owners and Regional Business offices
<b>Evaluate workforce needs in terms of workforce availability</b>	EDC Director & Staff	Preliminary results due end of 2016	Progress report in State of County Document and Final results complete by July 01, 2017	Continued evaluation report in State of County Document	Continued evaluation report in State of County Document	EDC Director, EDC Staff, and NC Dept. of Commerce
<b>Research workforce qualifications necessary for 21st Century jobs</b>	EDC Director & Staff	Preliminary results due end of 2016	Progress report in State of County Document and Final results complete by July 01, 2017	Continued evaluation report in State of County Document	Continued evaluation report in State of County Document	EDC Director, EDC Staff, and NC Dept. of Commerce
<b>Communicate workforce requirements to Community College and School Board</b>	EDC Director & Staff	X	Progress report in State of County Document	Progress report in State of County Document	Progress report in State of County Document	EDC Director

## GOAL #6: PROMOTION AND MARKETING

Objective #6.1: Prepare a **STATE OF THE COUNTY** document for presentation to County Commissioners

Objective #6.2: Develop a brand for Carteret County

Objective #6.3: Utilize that brand to promote our county image and in the recruitment of prospective businesses

Objective #6.4: Develop a marketing plan that will result in growth of jobs and salaries

Objective #6.5: Support the concept of a Millennial Campus and market designation to the benefit of the county

ACTIONS	RESPONSIBLE PARTIES	TIME FRAME				RESOURCES
		ONGOING	1 TO 2 YEARS	2 TO 3 YEARS	3 TO 5 YEARS	
Prepare a State of the County Document for annual presentation to County Commissioners	EDC Director, Staff & EDC Board	X	Annual review, evaluation and update prior to January presentation	Annual review, evaluation and update prior to January presentation	Annual review, evaluation and update prior to January presentation	EDC, Staff, & EDC Board
Research and develop a brand for Carteret County	EDC Director, Staff, & Board of Directors	Preliminary study completed by end of 2016	Present preliminary study results in January 2017 State of the County Document	New brand Presentation in January 2018	Evaluation and results presented in State of the County	Professional Branding agencies, EDC Director, EDC Board
Develop a marketing plan for Carteret County utilizing our new brand	EDC Director, Staff, & EDC Board	Preliminary Marketing Plan completed by end of 2016	Present preliminary plan outline in Jan 2017 State of the County Document	Annual review, evaluation and update prior to January presentation	Annual review, evaluation and update prior to January presentation	EDC Director, EDC Staff & EDC Board
Encourage the concept of a millennial campus designation through expansion of the CMAST & UNC Marine research facilities	EDC Director & EDC Board, NC State & UNC officials	Initiate dialogue by the end of 2016	Present summary of preliminary discussions in January 2017 State of the County Document	Annual review, evaluation and update prior to January presentation of State of the County document	Annual review, evaluation and update prior to January presentation of State of the County document	NC State & UNC Officials
Actively utilize the millennial campus designation in Marketing literature	EDC Director, Staff, & EDC Board	X	Review designation in January 2018 State of the County Document	Evaluate results of designation in State of the County document	Evaluate results of designation in State of the County document	EDC, Staff, & EDC Board

## MONITORING AND UPDATING THE ACTION PLAN

The utility of this plan depends entirely on whether or not it is used. This plan is intended to serve as a blueprint for the County's economic development efforts over the next five (5) years. The Economic Development Council bears much of the responsibility for implementation and monitoring of the plan, and *continuity of effort* is the overarching theme.

*Continuity of effort* is the coordination between county government and municipal government. The county and municipalities have similar goals in regard to job creation and economic prosperity. Most of the municipalities have economic development plans, and those plans must be congruent with the County's efforts. Community involvement, communication, and coordination are the driving principles.

Keys to successful implementation and continuity of effort include:

- Frame strategies primarily around building on existing assets;
- Have a network organizational structure;
- Have a planning and implementation processes that is iterative;
- Include short-term, easy-win goals;
- Decentralize responsibilities for implementation among multiple organizations;
- Use metrics to learn what is working and to make adjustments along the way; and
- Build high levels of trust among participants.

The Economic Development Council will revisit the plan annually and assess progress. At this annual assessment, updates to the plan should be made.



Photo courtesy Crystal Coast Tourism Development Authority

## APPENDIX ONE – CARTERET COUNTY STATISTICS

### Private Industry Jobs

Year	Carteret County Private Industry Jobs	North Carolina Private Industry Jobs
2000	17,480	3,264,128
2001	17,254	3,211,244
2002	17,242	3,131,936
2003	17,707	3,095,161
2004	18,146	3,142,224
2005	18,489	3,209,363
2006	18,726	3,296,429
2007	18,645	3,390,885
2008	18,565	3,361,021
2009	17,490	3,139,897
2010	17,099	3,101,577
2011	16,636	3,156,767
2012	17,368	3,225,090
2013	17,374	3,291,755
2014	17,778	3,375,467

Source: NC Commerce, LEAD, QCEW

### Jobs By Sector

Industry Sector	2007 Carteret County Jobs	2014 Carteret County Jobs	Change
Retail Trade	4,110	4,356	246
Accommodation and Food Services	3,622	3,712	90
Health Care and Social Assistance	2,787	3,272	485
Public Administration	1,614	1,723	109
Educational Services	1,740	1,668	-72
Construction	1,825	1,061	-764
Manufacturing	1,293	1,020	-273
Administrative and Waste Services	994	903	-91
Other Services, Ex. Public Admin	713	788	75
Professional and Technical Services	917	705	-212
Arts, Entertainment, and Recreation	635	691	56
Wholesale Trade	629	582	-47
Real Estate and Rental and Leasing	568	523	-45
Finance and Insurance	571	511	-60
Transportation and Warehousing	536	427	-109

Information	432	265	-167
Utilities	117	127	10
Agriculture, Forestry, Fishing & Hunting	78	93	15
Management of Companies and Enterprises	24	16	-8
<b>Totals</b>	<b>23,205</b>	<b>22,443</b>	<b>-762</b>

Source: NC Commerce, LEAD, QCEW

### Turnover Rate

Industry Sector	Carteret County 2013 Turnover Rate	North Carolina 2013 Turnover Rate
Accommodation and Food Services	18.1%	15.8%
Arts, Entertainment, and Recreation	15.6%	13.9%
Administrative and Waste Services	12.5%	17.5%
Other Services, Ex. Public Admin	11.3%	10.1%
Retail Trade	10.2%	10.0%
Construction	9.7%	10.3%
Transportation and Warehousing	9.7%	7.5%
Health Care and Social Assistance	8.1%	7.1%
Professional and Technical Services	7.9%	8.8%
Real Estate and Rental and Leasing	7.7%	9.6%
Wholesale Trade	6.7%	6.2%
Educational Services	6.0%	5.6%
Information	5.9%	6.0%
Manufacturing	5.7%	5.0%
Public Administration	5.4%	3.9%
Finance and Insurance	5.2%	5.6%
Agriculture, Forestry, Fishing and Hunting	NA	10.0%
Management of Companies and Enterprises	NA	5.8%
Mining, Quarrying, and Oil and Gas Extraction	NA	4.8%
Utilities	NA	4.1%

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics

## Average Annual Wages in Carteret County

Industry Subsectors	2007	2008	2009	2010	2011	2012	2013	2014	2014 Weekly Wage	2007 to 2014 Change
North Carolina	\$40,456	\$41,236	\$42,536	\$43,782	\$42,848	\$44,408	\$44,772	\$46,280	\$890	12.6%
Carteret County (All Industries)	29,016	29,588	30,784	31,148	30,784	31,304	31,460	32,708	\$582	11.3%
Nonstore Retailers	\$20,720	\$20,304	\$20,890	\$20,723	\$22,088	\$26,195	\$31,888	\$35,683	\$686	72.2%
Utilities	45,179	48,899	49,899	49,722	52,160	52,266	54,504	69,767	\$1,342	54.4%
Miscellaneous Manufacturing	19,832	NA	26,450	25,832	21,476	NA	30,698	28,385	\$546	43.1%
Professional and Technical Services	38,721	45,042	45,904	49,316	49,035	48,587	50,341	50,232	\$966	29.7%
Ambulatory Health Care Services	40,300	41,818	42,620	44,045	46,099	48,520	47,947	49,625	\$954	23.1%
Support Activities for Transportation	52,376	54,351	56,947	60,356	60,468	72,013	52,558	64,388	\$1,238	22.9%
Museums, Parks and Historical Sites	37,111	37,901	31,431	NA	38,503	41,608	38,736	45,217	\$870	21.8%
Real Estate	25,750	26,624	25,853	26,437	26,097	28,688	29,443	30,929	\$595	20.1%
Specialty Trade Contractors	28,170	29,470	29,899	30,996	29,884	30,948	32,277	33,593	\$646	19.2%
Health and Personal Care Stores	30,678	31,249	32,500	34,152	34,911	35,246	34,737	36,189	\$696	18.0%
Food Services and Drinking Places	12,342	12,677	13,152	13,036	13,558	13,510	13,908	14,543	\$280	17.8%
Heavy and Civil Engineering Construction	29,452	28,070	29,731	33,030	33,846	33,309	36,460	34,224	\$658	16.2%
Rental and Leasing Services	18,475	19,794	20,313	17,680	19,136	18,640	19,052	21,347	\$411	15.5%
Sports, hobby, music inst., book stores	14,296	14,155	14,970	14,905	14,923	15,400	15,311	16,517	\$318	15.5%
Membership Organizations & Associations	21,999	22,911	22,903	23,859	24,193	24,490	24,867	25,322	\$487	15.1%
Administrative and Support Services	19,653	20,446	21,301	22,009	22,567	21,303	22,849	22,605	\$435	15.0%
Repair and Maintenance	23,140	24,311	24,804	24,625	27,122	26,874	26,793	26,606	\$512	15.0%
Nursing and Residential Care Facilities	20,330	21,167	21,439	22,315	23,022	22,743	21,854	23,368	\$449	14.9%
Construction of Buildings	31,867	32,276	33,002	31,278	32,617	35,268	38,522	36,621	\$704	14.9%
Publishing Industries	25,991	28,211	26,011	25,651	26,504	26,708	28,446	29,647	\$570	14.1%
Motion Picture & Sound Recording Ind	7,439	5,271	5,476	9,291	10,606	10,131	7,832	8,461	\$163	13.7%
Financial Investment & Related Activity	126,811	109,140	87,821	87,540	115,610	112,411	153,649	144,062	\$2,770	13.6%

Industry Subsectors	2007	2008	2009	2010	2011	2012	2013	2014	2014 Weekly Wage	2007 to 2014 Change
Merchant Wholesalers, Nondurable Goods	31,642	31,524	35,226	36,646	39,102	40,075	35,909	35,779	\$688	13.1%
Accommodation	17,120	18,356	18,010	17,960	18,339	18,943	19,593	19,346	\$372	13.0%
Transportation Equipment Manufacturing	30,969	31,927	31,655	32,285	32,158	33,557	36,599	34,447	\$662	11.2%
Insurance Carriers & Related Activities	47,764	50,140	44,956	45,500	38,976	40,647	41,496	52,841	\$1,016	10.6%
Postal Service	43,204	42,282	42,352	44,122	45,353	47,382	50,044	47,581	\$915	10.1%
Clothing and Clothing Accessories Stores	14,003	13,694	14,135	14,838	14,880	14,601	14,823	15,382	\$296	9.8%
Electronic Markets and Agents/Brokers	65,939	72,056	72,190	64,564	75,077	88,049	81,105	72,289	\$1,390	9.6%
Motor Vehicle and Parts Dealers	33,252	31,811	30,125	32,989	35,716	34,845	36,110	36,445	\$701	9.6%
Telecommunications	49,637	52,115	43,200	52,137	51,173	51,069	52,313	54,142	\$1,041	9.1%
Personal and Laundry Services	16,519	17,822	17,684	17,675	16,779	16,271	18,140	17,943	\$345	8.6%
Executive, Legislative, & Gen Government	30,231	31,178	31,994	32,035	32,360	31,617	32,074	32,730	\$629	8.3%
Justice, Public Order, and Safety Activities	40,618	43,789	41,592	41,176	41,749	41,720	43,123	43,724	\$841	7.6%
Gasoline Stations	15,165	14,864	15,376	15,493	15,440	15,392	16,165	16,165	\$311	6.6%
Amusement, Gambling & Recreation Ind	16,890	17,000	16,542	15,992	15,986	16,471	16,902	17,993	\$346	6.5%
Nonmetallic Mineral Product Mfg	33,025	27,300	28,124	32,430	32,261	29,517	30,141	35,130	\$676	6.4%
Furniture and Home Furnishings Stores	25,554	26,132	25,760	23,804	26,891	26,800	26,280	27,157	\$522	6.3%
Textile Product Mills	19,763	19,396	18,081	15,151	15,003	13,755	15,733	20,269	\$390	2.6%
Credit Intermediation & Related Activity	41,604	39,307	40,472	43,085	43,637	46,261	43,364	42,657	\$820	2.5%
Educational Services	34,918	35,692	35,453	34,844	34,201	35,058	34,504	35,627	\$685	2.0%
Food and Beverage Stores	16,608	17,377	18,287	17,543	16,344	16,670	16,798	16,933	\$326	2.0%
Merchant Wholesalers, Durable Goods	41,572	41,046	42,946	39,891	41,345	42,818	40,432	41,837	\$805	0.6%
General Merchandise Stores	19,546	20,071	19,884	19,820	19,690	19,614	19,937	19,448	\$374	-0.5%
Miscellaneous Store Retailers	14,012	15,353	15,636	16,225	16,176	15,599	15,175	13,852	\$266	-1.1%
Crop Production	29,262	29,614	28,631	29,779	29,635	28,578	29,975	28,871	\$555	-1.3%
Building Material & Garden Supply Stores	25,857	25,620	25,224	25,382	24,930	25,593	25,484	25,207	\$485	-2.5%
Private Households	17,034	17,966	14,210	16,500	16,575	17,314	16,728	16,373	\$315	-3.9%
Social Assistance	16,136	15,838	17,358	17,554	18,224	17,460	16,528	15,459	\$297	-4.2%

Industry Subsectors	2007	2008	2009	2010	2011	2012	2013	2014	2014 Weekly Wage	2007 to 2014 Change
Printing and Related Support Activities	25,289	22,395	22,139	22,452	23,655	23,151	24,197	23,842	\$459	-5.7%
Furniture and Related Product Mfg	34,007	36,676	28,572	30,182	27,918	28,837	29,991	30,512	\$587	-10.3%
Other Information Services	17,479	16,949	18,917	16,198	19,694	15,455	15,743	15,545	\$299	-11.1%
Truck Transportation	37,933	NA	45,039	38,136	39,747	48,552	39,305	33,215	\$639	-12.4%
Management of Companies and Enterprises	42,391	38,599	37,136	34,115	36,364	37,367	39,895	36,907	\$710	-12.9%
Electronics and appliance stores	35,409	25,338	24,841	22,055	23,749	25,385	29,558	27,338	\$526	-22.8%
Water Transportation	24,185	21,328	NA	22,074	22,210	20,050	18,530	15,187	\$292	-37.2%

Source: NC Commerce, LEAD

### Impacts of Travel and Tourism on Carteret County

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Travel Expenditures (Millions)	\$235.10	\$246.30	\$262.00	\$269.56	\$267.42	\$257.56	\$271.30	\$278.74	\$282.03	\$302.77
Travel Payroll (Millions)	\$50.30	\$50.60	\$51.20	\$50.69	\$51.25	\$49.15	\$48.65	\$48.77	\$49.06	\$52.93
Travel Employment (000s)	3.30	3.20	3.20	3.17	3.09	3.04	2.99	2.96	2.93	3.06
State Tax Receipts from Travel (Millions)	\$11.30	\$11.60	\$12.20	\$11.99	\$12.05	\$12.51	\$13.60	\$13.20	\$12.47	\$13.38
Local Tax Receipts from Travel (Millions)	\$15.50	\$16.00	\$16.90	\$17.39	\$17.38	\$16.94	\$17.52	\$17.38	\$16.98	\$17.76

Source: Log Into North Carolina (LINC), NC Department of Commerce data

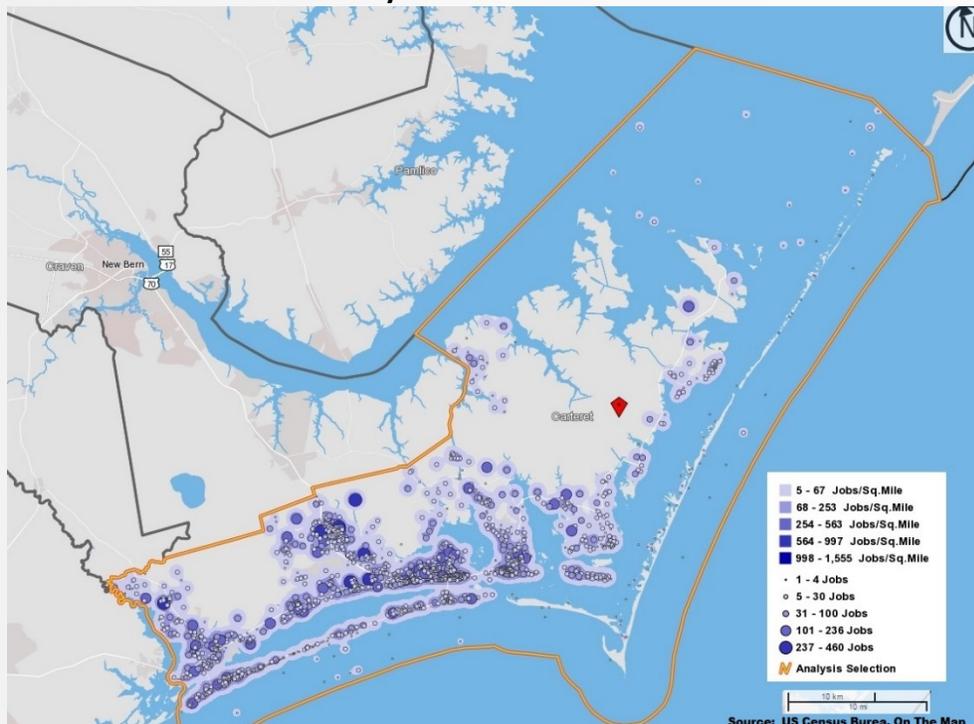


## Carteret County's Top 20 Employers 2014 4th Quarter

Rank	Company Name	Employment Range
1	Carteret County Board Of Education	1,000+
2	Carteret County General	500-999
3	County Of Carteret	500-999
4	Wal-Mart	250-499
5	Food Lion	250-499
6	Carteret Community College	250-499
7	Lowe's Home Centers	250-499
8	Big Rock Sports	250-499
9	N.C. Dept. of Environment & Natural Resources	100-249
10	Lowe's Food Stores	100-249
11	Refrigerated Boxes	100-249
12	McDonald's	100-249
13	Town Of Morehead City	100-249
14	Atlantic Veneer Corp.	100-249
15	General Mills Restaurants	100-249
16	South East Employee Leasing Service	100-249
17	Belk	100-249
18	Adams Keegan	100-249
19	N.C. Dept. of Public Safety	100-249
20	Harborview Healthcare	100-249

Source: NC Commerce, LEAD, QCEW Largest Employers

## Where The Jobs In The County Are

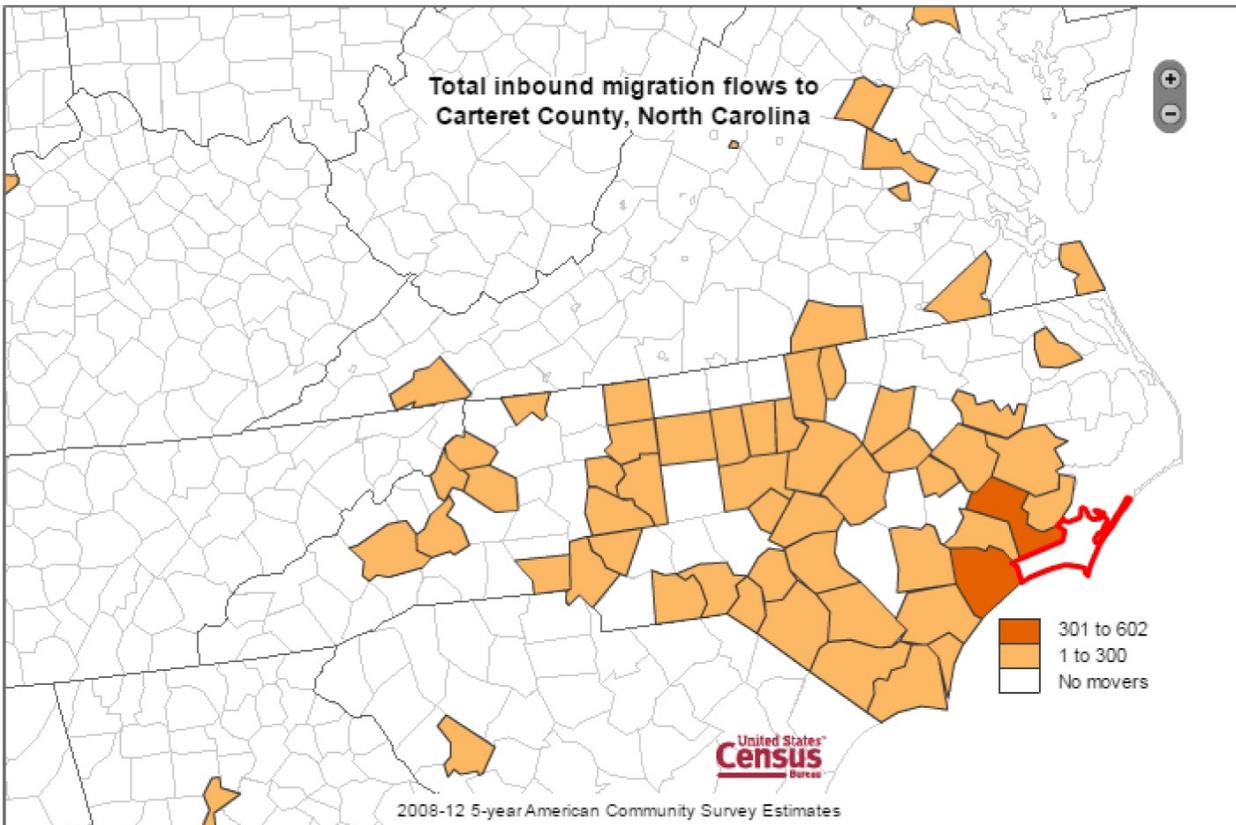
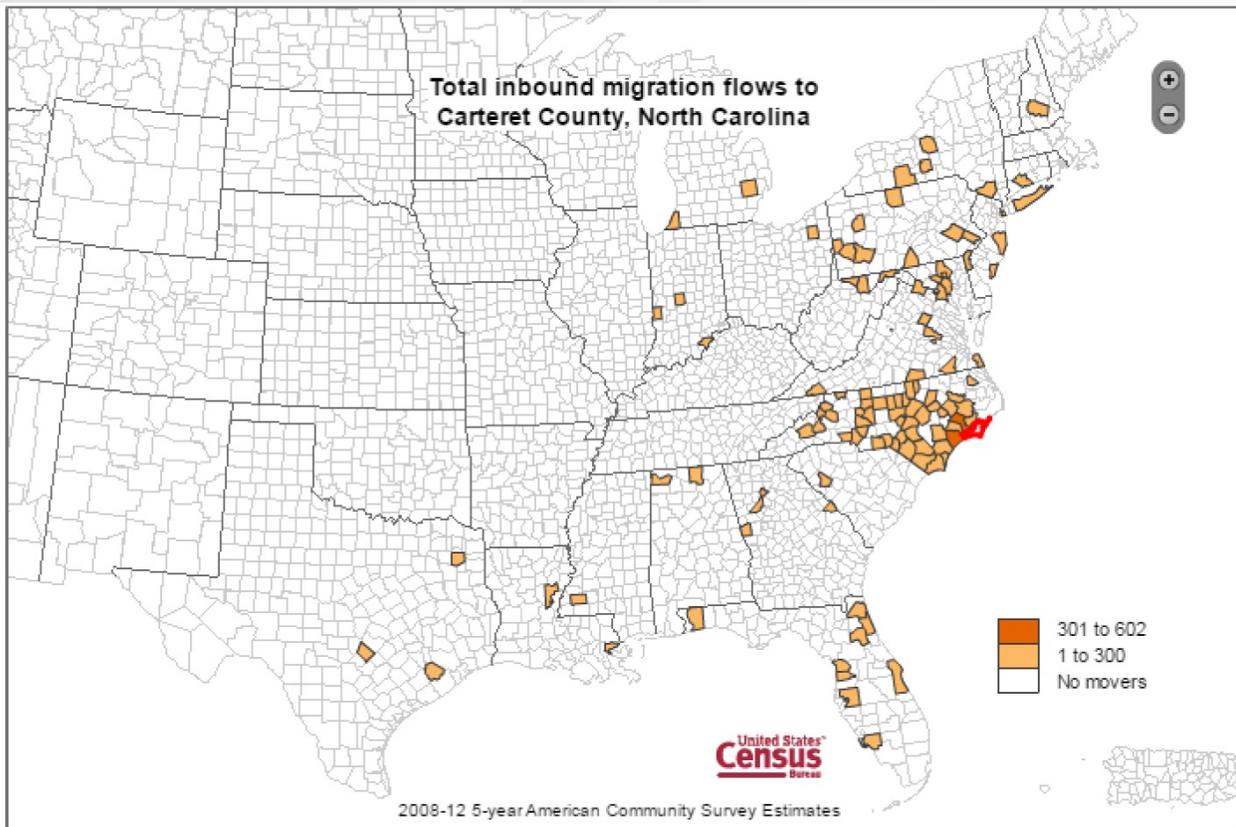


## Port Characteristics

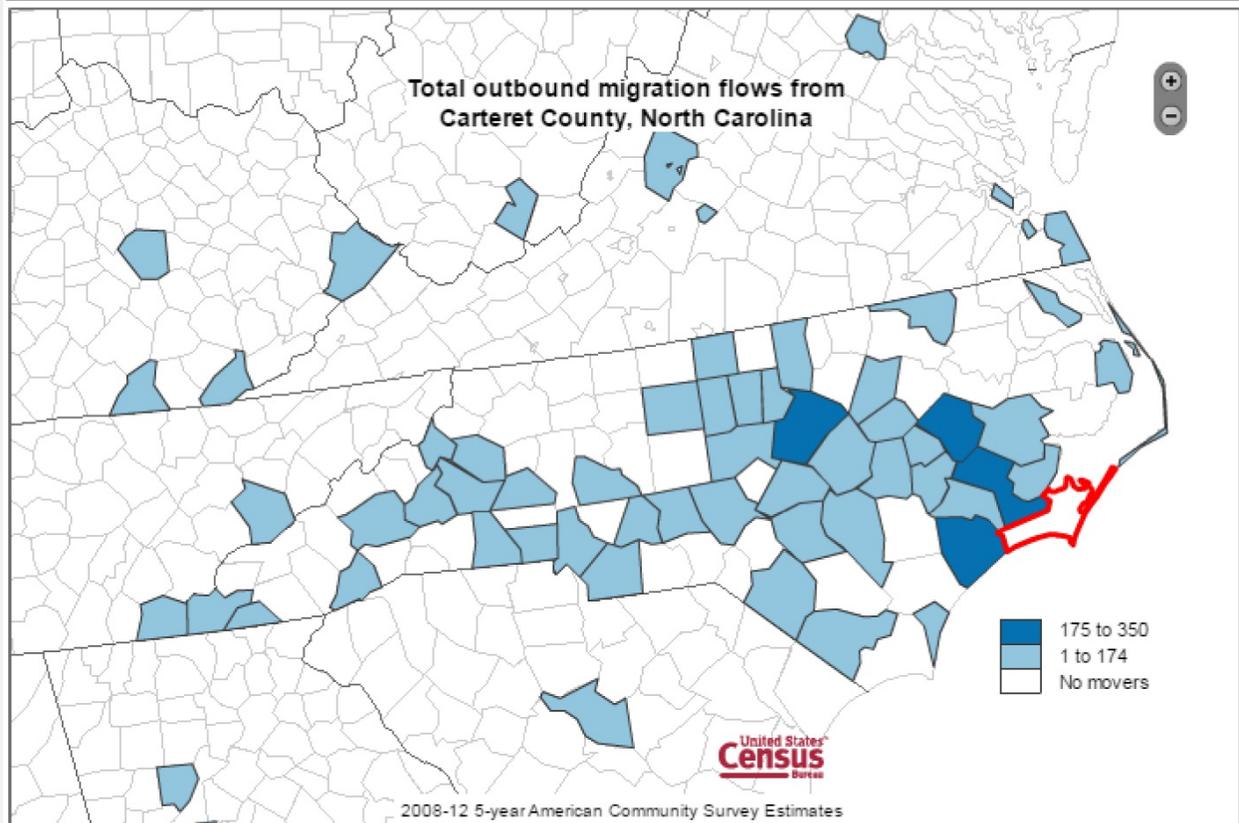
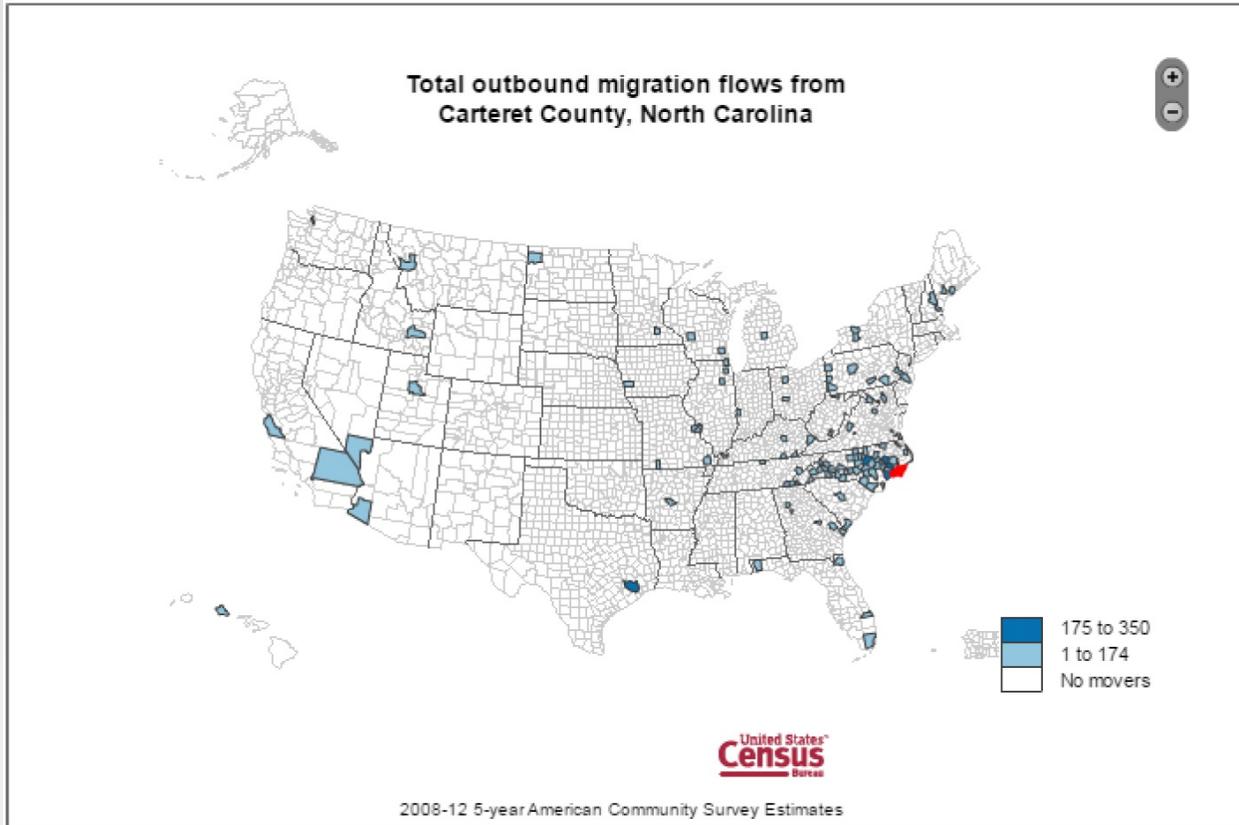
Characteristic	Wilmington	Morehead City	Norfolk	Charleston	Savannah
Landside Characteristics					
Employment (300 miles)	9,835,746	11,299,091	25,709,948	13,763,843	15,884,074
Employment (500 miles)	41,704,522	41,900,520	50,527,138	33,299,436	29,043,452
Distance to Interstate From Gate	7.8 mi to I-140 and US 17	111 mi to I-795	5.8 mi to I-264	2.5 mi to US 17 and I-26	5.6 mi to I-95 from Garden City Terminal; 1.2 mi to I-16, 10 mi to I-95
Rail Access	CSX serve; In-port switching by Wilmington Terminal Railroad; Substantial rail car storage	NS service; In port switching by Carolina Coastal Railway; Railroad scale; substantial car storage	CSX and NS service to Hampton Roads; NS and CSX service to Norfolk via Suffolk and the Commonwealth Railway	CSX and NS service to Union Pier; Columbus Street, North Charleston and Veterans; On-terminal rail yards at Columbus St and North Charleston	CSX and NS service to Garden City and Ocean Terminal; On-terminal ICTF at Garden City
Port Characteristics					
Distance to Sea Buoy (miles)	26	4	18	16	20
Depth (maximum ft)	42	45	NIT: 60 (with authorization to dredge to 55) APMT: 55	45 (harbor channel and dockside)	Garden City Terminal: 42
Type of Facilities	Container Limited Ro/Ro Breakbulk Limited refrigerated cargo Selected Bulk	Ro/Ro Breakbulk Selected Bulk	Bulk Grain Container Ro/Ro Breakbulk	Container Ro/Ro Breakbulk Bulk Refrigerated cargo Cruise	Container Ro/Ro Breakbulk Bulk Refrigerated cargo Cruise
Military Use	Yes – Strategic Seaport	Yes-Strategic Seaport	Yes-Strategic Seaport (Hampton Roads)	Yes-Strategic Seaport	Yes-Strategic Seaport

Source: North Carolina Maritime Strategy 2012

# Inbound Migration



## Outbound Migration



## Educational Attainment

Subject	Total Estimate	Male Estimate	Female Estimate
Population 18 to 24 years	4,904	2,607	2,297
Less than high school graduate	14.2%	20.3%	7.4%
High school graduate (includes equivalency)	31.5%	38.6%	23.5%
Some college or associate's degree	47.0%	34.8%	60.9%
Bachelor's degree or higher	7.3%	6.4%	8.3%
Population 25 years and over	49,636	23,917	25,719
Less than 9th grade	3.4%	3.9%	2.9%
9th to 12th grade, no diploma	8.3%	9.1%	7.6%
High school graduate (includes equivalency)	28.2%	30.3%	26.2%
Some college, no degree	26.6%	26.2%	26.9%
Associate's degree	9.7%	7.4%	11.8%
Bachelor's degree	16.1%	14.9%	17.3%
Graduate or professional degree	7.7%	8.3%	7.2%
Percent high school graduate or higher	88.3%	87.0%	89.5%
Percent bachelor's degree or higher	23.9%	23.2%	24.5%
Population 25 to 34 years	7,430	3,767	3,663
High school graduate or higher	87.3%	86.1%	88.5%
Bachelor's degree or higher	22.7%	16.6%	29.0%
Population 35 to 44 years	7,891	3,925	3,966
High school graduate or higher	89.3%	87.1%	91.6%
Bachelor's degree or higher	23.4%	20.9%	26.0%
Population 45 to 64 years	21,057	10,068	10,989
High school graduate or higher	91.1%	88.4%	93.6%
Bachelor's degree or higher	25.1%	23.1%	26.8%
Population 65 years and over	13,258	6,157	7,101
High school graduate or higher	83.9%	85.4%	82.5%
Bachelor's degree or higher	22.9%	28.8%	17.7%
<b>POVERTY RATE FOR THE POPULATION 25 YEARS AND OVER FOR WHOM POVERTY STATUS IS DETERMINED BY EDUCATIONAL ATTAINMENT LEVEL</b>			
Less than high school graduate	29.2%	29.2%	29.2%
High school graduate (includes equivalency)	12.6%	13.3%	11.9%
Some college or associate's degree	10.4%	6.4%	13.6%
Bachelor's degree or higher	3.9%	2.6%	5.0%
<b>MEDIAN EARNINGS IN THE PAST 12 MONTHS (IN 2013 INFLATION-ADJUSTED DOLLARS)</b>			
Population 25 years and over with earnings	29,477	33,691	23,708
Less than high school graduate	17,083	20,100	13,179
High school graduate (includes equivalency)	25,185	30,672	19,990
Some college or associate's degree	27,842	33,483	20,884
Bachelor's degree	41,793	50,120	36,480
Graduate or professional degree	55,139	70,174	51,746

Source: US Census, American Community Survey

## Farm Data

Census of Agriculture - 2007	
Total Acres in County	323,655
Number of Farms	159
Total Land in Farms, Acres	55,387
Average Farm Size, Acres	348
Harvested Cropland, Acres	36,336
Average Age of Farmers	56.0
Average Value of Farm & Buildings	\$1,070,514
Average Market Value of Machinery & Equipment	\$99,640
Average Total Farm Production Expense	\$91,414



Crops - 2012	Acres Harvested	Yield	Production	Rank
Corn for Grain: Bu.	*	*	*	*
Cotton: Lbs.: Production in 480 Lb. Bales	*	*	*	*
Hay, Other: Tons	*	*	*	*
Peanuts: Lbs.	*	*	*	*
Soybeans: Bu.	*	*	*	*
Sweet Potatoes: Cwt.	*	*	*	*
Tobacco, Burley: Lbs.	*	*	*	*
Tobacco, Flue-Cured: Lbs.	*	*	*	*
Wheat: Bu.	*	*	*	*
Nursery, Greenhouse, Floriculture & Christmas Trees (Dollars)			778,000	75
Vegetables, Fruits, Nuts & Berries (Dollars)			1,802,000	54
Livestock			Number	Rank
Broilers Produced (2012)			*	*
Cattle, All (Jan. 1, 2013)			200	96
Beef Cows (Jan. 1, 2013)			100	95
Milk Cows (Jan. 1, 2013)			*	*
Hogs and Pigs (Dec. 1, 2012)			*	*
Layers (Dec. 1, 2012)			*	*
Turkeys Raised (2012)			*	*
Cash Receipts - 2012			Dollars	Rank
Livestock, Dairy and Poultry			2,117,000	86
Crops			2,607,000	95
Government Payments			1,234,157	61
Total			5,958,157	94

Source: NC Department of Agriculture

## APPENDIX TWO – ONLINE SURVEY RESPONSES

### Carteret County Economic Development Survey Results

#### *November 2, 2015 - Sorted Report*

Responses: 1,204

**1. What is your age?**

	<i>Response Total</i>	<i>Response Percent</i>
16 - 20	0	0%
21 - 34	108	9%
35 - 49	365	22%
50 - 64	467	39%
65+	347	29%

**2. Select one (1) of the following responses regarding your primary place of residence**

	<i>Response Total</i>	<i>Response Percent</i>
I live in Carteret County in a residence I own	647	57%
My primary residence is not in Carteret County, but I own a second residence here	324	27%
I live in Carteret County in a residence I rent	117	10%
My primary residence is not in Carteret County	69	6%

**3. If you live in, own, or rent a residence in Carteret County, which best describes your location?**

	<i>Response Total</i>	<i>Response Percent</i>
Emerald Isle	465	40%
Morehead City	142	12%
Pine Knoll Shores	120	10%
Beaufort	106	9%
Newport	98	9%
Down East	56	5%
Unincorporated area of Carteret County	44	4%
Cape Carteret	32	3%
Cedar Point	31	3%
Atlantic Beach	24	2%
Bogue	14	1%

Peletier	12	1%
Indian Beach	8	1%

**4. Select all that apply regarding your work/business (you may pick more than 1)**

	<i>Response Total</i>	<i>Response Percent</i>
I work full or part time in Carteret County	568	48%
I am retired	365	31%
I work full or part time outside of Carteret County	255	22%
I own a business in Carteret County	90	8%
I do not work	30	3%
I am a visitor to Carteret County	29	2%
I am unemployed	22	2%

**5. What field do you work in?**

	<i>Response Total</i>	<i>Response Percent</i>
Educational Services	291	27%
Retired	156	14%
Public Administration/Government	120	11%
Other	97	9%
Healthcare	82	7%
Professional and Technical Services	62	6%
Administrative	39	4%
Real Estate and Rental and Leasing	39	4%
Finance and Insurance	33	3%
Construction, Home Maintenance Services	30	3%
Information Technology	27	2%
Retail Trade	19	2%
Manufacturing	15	1%
Arts, Entertainment, and Recreation	14	1%
Military Support	12	1%
Military	8	1%
Accommodation and Food Services	7	1%
Utilities	7	1%
Marine/Life Sciences	6	1%
Transportation and Warehousing	6	1%
Tourism	5	0%
Wholesale Trade	5	0%
Agriculture, Forestry, Fishing, and Hunting	4	0%
Marine Trades	4	0%
State Port	3	0%

Student	2	0%
Logistics	1	0%

**6. What are the County's greatest strengths (pick 2)**

	<i>Response Total</i>	<i>Response Percent</i>
Water-based Lifestyle	610	51%
Natural Beauty/Green Space	462	39%
East Coast Location	357	30%
Visitors and Tourism	238	20%
Highly Rated Public Schools	162	14%
Low Taxes	138	12%
Cost of Living	107	9%
Military Presence	93	8%
Other	39	3%
Marine Sciences	29	2%
State Port	28	2%
Geographic Diversity	11	1%
Healthcare	7	1%

**7. What recent challenges, changes and trends (things the County has little to no control of) that you think will have the greatest impact on the community over the next 5 years? (Pick 3)**

	<i>Response Total</i>	<i>Response Percent</i>
Property Insurance Rates	555	47%
Offshore Drilling	314	27%
Beach Nourishment	293	25%
Providing High Wage Jobs	278	23%
State and Federal Regulations	236	20%
Retaining Young People	231	20%
Infrastructure to Support Growth	222	19%
Military Downsizing	204	17%
Lack of Affordable Housing	180	15%
Education	161	14%
Sea Level Rise	155	13%
Rapid Growth/Sprawl	119	10%
Resiliency/Natural Disaster Recovery	73	6%
Access to/from the State Port (roads/rail)	71	6%
Other	59	5%
Lack of Sites and Buildings for New Business	42	4%
County Regulations	41	3%
Port Dredging	40	3%

Geographic Diversity	11	1%
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**8. What future opportunities do you think the County has? (Pick 3)**

	<i>Response Total</i>	<i>Response Percent</i>
Tourism-related	494	42%
Marine Sciences and Aquaculture	296	25%
Improved Highway Access	295	25%
Job Creation	245	21%
Improved Appearance	238	20%
More Youth/Family Activities	235	20%
Healthcare-related	226	19%
Increased Cultural/Arts Opportunities	200	17%
Attracting Technology Businesses	170	15%
Port-related Business Expansion	163	14%
More Young People (20-40) Living Here	159	14%
Convention/Trade Shows	151	13%
High Wage Small Business Development	131	11%
Marine Trades and Boat Building	114	10%
New Business Sites/Buildings	105	9%
Other	44	4%

**9. What do you think will generate better paying jobs in the county? (Pick 2)**

	<i>Response Total</i>	<i>Response Percent</i>
Health Care	426	37%
Technology	308	27%
Tourism	266	23%
Professionals Working Remotely	262	23%
Defense-related	228	20%
Marine Sciences	188	16%
Manufacturing/Production/Assembly	177	15%
Marine Trades/Boat Building	95	8%
Service	85	7%
Retail	74	6%
Agriculture/Aquaculture	70	6%
Logistics	48	4%
Other	35	3%

**10. What factors will foster the attraction, creation, and retention of better paying jobs? (Pick 3)**

	<i>Response Total</i>	<i>Response Percent</i>
--	---------------------------	-----------------------------

Continued K-12 Education Investment	504	43%
Create Financial Incentives to Develop and Expand New Businesses/Industries	439	37%
Identify and Recruit Technology Companies	322	27%
Entrepreneur/Small Business Development	311	26%
Year Round High End Tourism Opportunities	304	26%
Invest in Sites and Infrastructure (Water, Sewer, Internet)	276	24%
Grow Healthcare Industry	264	22%
Develop Parks/Public Spaces/Recreational Opportunities	245	21%
Develop Arts and Cultural Entertainment	192	16%
County Appearance	159	14%
Streamline Governmental Processes	120	10%
Provide Incentives for Affordable and Workforce Housing	107	9%
Other	45	4%

**11.** What are the county's workforce development, training, and educational needs? (Pick 2)

	<i>Response Total</i>	<i>Response Percent</i>
Grades 9-12 STEM (Science, Technology, Engineering, Mathematics) Program	435	38%
Technology Training	403	35%
Vocational Training	296	26%
Basic Workforce Training	242	21%
Healthcare Training	238	21%
Creating Entrepreneurs	205	18%
Employing Military Veterans	191	17%
Marine Trades/Boat Building Training	108	9%
Advanced Manufacturing	105	9%
Other	24	2%

**12.** Provide the top 3 advantages and top 3 disadvantages of Carteret County (Pick 3 of each)  
Top responses in **BOLD**

	<i>Advantage</i>	<i>Disadvantage</i>	<i>Response Total</i>
<b>Natural Beauty</b>	<b>799</b>	9	808
<b>Access to Arts, Cultural, &amp; Entertainment</b>	69	<b>438</b>	507
<b>Crime Rate</b>	<b>421</b>	68	489
<b>Affordable Housing</b>	89	<b>376</b>	465
Access to Retail, Recreational, & Shopping Opportunities	159	292	451
Low Taxes	326	93	419
<b>Access to Parks &amp; Public Space</b>	<b>332</b>	82	414

Quality of School System (K-12)	322	88	410
<b>Public Transportation</b>	17	<b>377</b>	394
Restaurants, Eateries, & Taverns	270	120	390
Workforce Quality	36	313	349
Highway Access	63	273	336
Commute Time	180	150	330
Workforce Availability	42	272	314
County Appearance	197	106	303
Infrastructure (Water & Sewer)	46	240	286
Water & Air Quality	240	34	274
Retirees	167	58	225
Access to Banks & Professional Services	135	73	208
Availability & Cost of Sites & Buildings	38	149	187
Quality of Community College	124	49	173

**13. What concerns you the most about the future of Carteret County?**

738 responses

**14. Would you like information on services, assistance, or products available to help you start a business or expand your current business? (provide name, phone number or email address)**

176 responses

## APPENDIX THREE – MAJOR ISSUES FROM TOWN PLANS

### ***Major Issues From Town Plans***

(Issues are identified in *italics*)

#### **Newport**

##### *Business Growth*

Goal: Continue economic development efforts to recruit, expand, and retain businesses and jobs

##### *Cherry Point*

Goal: Support Marine Corps Air Station Cherry Point and Fleet Readiness Center East

##### *Tourism/Entertainment/Recreation*

Goal: Provide a variety of entertainment and recreational options for residents and visitors

##### *Infrastructure*

Goal: Provide adequate water and sewer to Newport residents and businesses

#### **Cedar Point**

##### *Water Access*

Goal: Having public access to Public Trust Waters

##### *Community Character*

Goal: Identifying a unique community character

##### *Economic Development*

Goal: Creating and maintaining internal and external economic development

##### *Recreation/Tourism*

Goal: Crafting the Town as a recreation and tourist destination

#### **Cape Carteret**

##### *Aesthetics*

Goal: Create a sense of place and an identity that is "Cape Carteret"

##### *Communication*

Goal: Improve communication with citizens and neighboring communities

##### *Traffic*

Goal: Create a safe environment for pedestrian and vehicle traffic

Goal: Create a pedestrian/bicycle friendly transportation system within the Town

### *Parks and Recreation*

Goal: Improve parks and recreational and public water access opportunities in the Town

### *Access to Healthcare*

Goal: Improve local access to quality healthcare

### *Job Creation*

Goal: Create jobs and economic development opportunities

## **Emerald Isle**

### *Increase Off-Season Business*

Goal: Increase off-season business and employment and encourage an increase in the number of recreational and cultural events

### *Insurance Rates*

Goal: Minimize the impacts of flood and wind insurance rate increases and designations of critical habitats

### *Maintain Low Taxes*

Goal: Maintain a low tax rate

### *Beach Nourishment/Inlet Dredging*

Goal: Continue beach nourishment and inlet dredging

### *Improve Beach and Sound Access*

Goal: Increase beach and sound access while maintaining a clean natural environment

## **Pine Knoll Shores**

### *Beach Preservation*

Goal: Maintain our beach profile and strengthen our frontal dune system in as fiscally and environmentally responsible a way as possible

### *Infrastructure*

Goal: Improve and maintain municipal property

### *Community Involvement*

Goal: Build a stronger sense of community

### *Public Safety and Disaster Planning*

Goal: Maintain a safe and secure community

### *Environment/Natural Resources*

Goal: Maintain and improve the natural environment

### *Residency/Commercial Development*

Goal: Maintain and improve residential character and appearance

*Fiscal Planning*

Goal: Manage financial resources to provide for sufficiency, but also encourage prudence in the use of funds and efficiency in everyday activity

**Atlantic Beach**

*Increase Off-Season Business*

Goal: Increase off-season business and employment and encourage an increase in the number of recreational and cultural events.

*Family/Youth Entertainment*

Goal: Increase entertainment opportunities for families and youth

*Sidewalks and Bike Paths*

Goal: Encourage Pedestrian and Bicycle Friendly Measures

*Improve Town Appearance*

Goal: Improve the appearance of Atlantic Beach

*Beach and Sound Access*

Goal: Increase beach and sound access

*The Circle*

Goal: Renew the Circle

**Morehead City**

*Seasonal Economic Activity*

Goal: Create year-round activity

Goal: Expand healthcare services and opportunities in town

Goal: Continue to recognize and capitalize on the presence of the State Port

*Marine Sciences*

Goal: Capitalize on the significant presence of marine science in Morehead City

Goal: Improve commercial and recreational fishing opportunities

*Transportation*

Goal: Improve access to and from the State Port

Goal: Provide more opportunities for public transportation

Goal: Improve bicycle and pedestrian access

Goal: Increase usage of the western end of Bridges Street as a reliever or bypass route of Arendell Street

### *Three Separate Business Areas*

Goal: Maximize the potential of the Town's business areas

### *Communication*

Goal: Improve communication to the public

### *Inventory and Infrastructure*

Goal: Improve the marketability of current commercial building inventory

Goal: Provide infrastructure capacity that meets economic development needs

## **Beaufort**

### *Highway 70 Corridor*

Goal: Plan and prepare for opportunities associated with from the new Highway 70 corridor and bridge in Beaufort

### *Increased Recreational Opportunities*

Goal: Focus on recreation as a tool to drive tourism, enhance opportunities for visitors and to improve the quality of life for residents

### *Preserve the Small Town, Historic Atmosphere*

Goal: Enhance and protect the historic appeal, small town atmosphere and sense of place currently enjoyed in Beaufort

### *Street and Sidewalk Improvements*

Goal: Improve the condition and functionality of the streets and sidewalks of Beaufort

## **Down East**

### *Organization*

Goal: Participation by a diverse group of community leaders who can fully represent and engage Down East residents for the long term

### *Design*

Goal: Retain the "sense of place" and cultural integrity of Down East with vestiges of the heritage and the culture seen in the historic homes, in the working fish houses, in the community grocery stores, and in the mom-and-pop businesses that serve residents and visitors year-round.

### *Promotion*

Goal: Improving Down East quality of life by creating a sense of place and belonging to a community, with a local promotion campaign designed to promote Down East to its own residents and businesses and mainland Carteret County; and secondly, a campaign to promote Down East to the "outside world."

### *Economic Revitalization*

Goal: Create responsible businesses that provide higher-quality jobs with livable wages and benefits, building on the strengths and skills of the people and communities, protecting and promoting the natural, cultural and historic resources that define the region. With focus on two broad areas: 1) strengthening existing businesses; and 2) cultivating, supporting and recruiting new businesses that help to strengthen and diversify the economy of the Down East region.

## APPENDIX FOUR – TEACHER SUPPLEMENTS

### Local Teacher Supplement Information - 2013-'14 Fiscal Year

#### *Selected LEA's in North Carolina*

School System	Average Dollar Amnt.	% of Annual Salary	Notes & Comments
<b>Chapel-Hill/Carrboro</b>	\$6,441	18.00%	From 12% to 25% based on yrs experience & certification
<b>Charlotte Mecklenberg</b>	\$6,376		Based on yrs experience & certification
<b>Wake County</b>	\$6,318	16.00%	From 14% to 17% based on yrs experience & certification
<b>Clinton City</b>	\$4,269	10.00%	
<b>Dare County</b>	\$4,233		Based on yrs experience & certification
<b><i>Onslow County</i></b>	<i>\$3,794</i>	<i>10.00%</i>	
State Average	<b>\$3,550</b>		
<b>Sampson County</b>	\$3,126		Based on yrs experience & certification
<b>New Hanover County</b>	\$2,858	8.00%	
<b>Brunswick County</b>	\$2,824		Based on yrs experience & certification
<b>Wayne County</b>	\$2,543	6.50%	
<b>Pender County</b>	\$2,416	6.00%	
<b><i>Carteret County</i></b>	<i>\$2,329</i>	<i>5.75%</i>	
<b><i>Craven County</i></b>	<i>\$2,100</i>		No Percentage; Same Supplement for All
<b><i>Jones County</i></b>	<i>\$1,954</i>		No Percentage; Same Supplement for All
<b>Pamlico County</b>	\$1,500		No Percentage; Same Supplement for All

## APPENDIX FIVE – RETAIL GAP ANALYSIS

### Summary Demographics

2013 Population	68,341
2013 Households	29,750
2013 Median Disposable Income	\$38,363
2013 Per Capita Income	\$27,195

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$728,268,662	\$693,803,402	\$34,465,260	2.4	693
Total Retail Trade	44-45	\$659,114,103	\$616,393,155	\$42,720,948	3.3	588
Total Food & Drink	722	\$69,154,559	\$77,410,247	-\$8,255,688	-5.6	105

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$126,835,045	\$82,269,366	\$44,565,679	21.3	59
Automobile Dealers	4411	\$108,296,539	\$58,983,352	\$49,313,187	29.5	15
Other Motor Vehicle Dealers	4412	\$7,561,075	\$15,425,908	-\$7,864,833	-34.2	34
Auto Parts, Accessories & Tire Stores	4413	\$10,977,431	\$7,860,106	\$3,117,325	16.5	10
Furniture & Home Furnishings Stores	442	\$14,568,562	\$11,286,326	\$3,282,236	12.7	29
Furniture Stores	4421	\$8,301,216	\$4,962,929	\$3,338,287	25.2	9
Home Furnishings Stores	4422	\$6,267,346	\$6,323,397	-\$56,051	-0.4	20
Electronics & Appliance Stores	4431	\$17,799,332	\$8,996,336	\$8,802,996	32.9	15
Bldg Materials, Garden Equip. & Supply Stores	444	\$25,470,260	\$47,315,097	-\$21,844,837	-30.0	49
Bldg Material & Supplies Dealers	4441	\$21,404,780	\$41,129,934	-\$19,645,154	-31.4	38
Lawn & Garden Equip & Supply Stores	4442	\$3,985,480	\$6,185,163	-\$2,199,683	-21.6	11
Food & Beverage Stores	445	\$104,093,047	\$87,681,230	\$16,411,817	8.6	69
Grocery Stores	4451	\$99,015,206	\$81,295,794	\$17,719,412	9.8	42
Specialty Food Stores	4452	\$1,793,935	\$2,554,210	-\$760,275	-17.5	20
Beer, Wine & Liquor Stores	4453	\$3,283,906	\$3,831,226	-\$547,320	-7.7	7
Health & Personal Care Stores	446,4461	\$61,363,738	\$136,701,447	-\$75,337,709	-38.0	33
Gasoline Stations	447,4471	\$75,993,059	\$54,345,785	\$21,647,274	16.6	14
Clothing & Clothing Accessories Stores	448	\$37,471,351	\$15,184,103	\$22,287,248	42.3	55
Clothing Stores	4481	\$26,699,178	\$11,019,665	\$15,679,513	41.6	39
Shoe Stores	4482	\$5,352,984	\$1,403,170	\$3,949,814	58.5	4
Jewelry, Luggage & Leather Goods Stores	4483	\$5,419,189	\$2,761,268	\$2,657,921	32.5	12
Sporting Goods, Hobby, Book & Music Stores	451	\$14,365,722	\$15,298,061	-\$932,339	-3.1	66
Sporting Goods/Hobby/Musical Instr Stores	4511	\$10,806,335	\$14,591,116	-\$3,784,781	-14.9	9
Book, Periodical & Music Stores	4512	\$3,559,387	\$706,945	\$2,852,442	66.9	9
General Merchandise Stores	452	\$125,979,877	\$124,480,435	\$1,499,442	0.6	15
Department Stores Excluding Leased Depts.	4521	\$42,078,782	\$4,445,346	\$37,633,436	80.9	5
Other General Merchandise Stores	4529	\$83,901,095	\$120,035,089	-\$36,133,994	-17.7	10
Miscellaneous Store Retailers	453	\$17,396,209	\$13,668,040	\$3,728,169	12.0	154
Florists	4531	\$928,521	\$1,269,057	-\$340,536	-15.5	14
Office Supplies, Stationery & Gift Stores	4532	\$4,452,621	\$4,778,710	-\$326,089	-3.5	47
Used Merchandise Stores	4533	\$1,616,153	\$1,654,317	-\$38,164	-1.2	25
Other Miscellaneous Store Retailers	4539	\$10,398,914	\$5,965,956	\$4,432,958	27.1	68
Nonstore Retailers	454	\$37,777,901	\$19,166,929	\$18,610,972	32.7	30
Electronic Shopping & Mail-Order Houses	4541	\$26,723,239	\$1,951,117	\$24,772,122	86.4	3
Vending Machine Operators	4542	\$1,686,981	\$476,147	\$1,210,834	56.0	4
Direct Selling Establishments	4543	\$9,367,681	\$16,739,665	-\$7,371,984	-28.2	23
Food Services & Drinking Places	722	\$69,154,559	\$77,410,247	-\$8,255,688	-5.6	105
Full-Service Restaurants	7221	\$26,841,216	\$39,546,731	-\$12,705,515	-19.1	46
Limited-Service Eating Places	7222	\$36,192,822	\$30,642,448	\$5,550,374	8.3	31
Special Food Services	7223	\$1,565,168	\$949,921	\$615,247	24.5	3
Drinking Places - Alcoholic Beverages	7224	\$4,555,353	\$6,271,147	-\$1,715,794	-15.8	25

**Data Note:** Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail Marketplace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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