

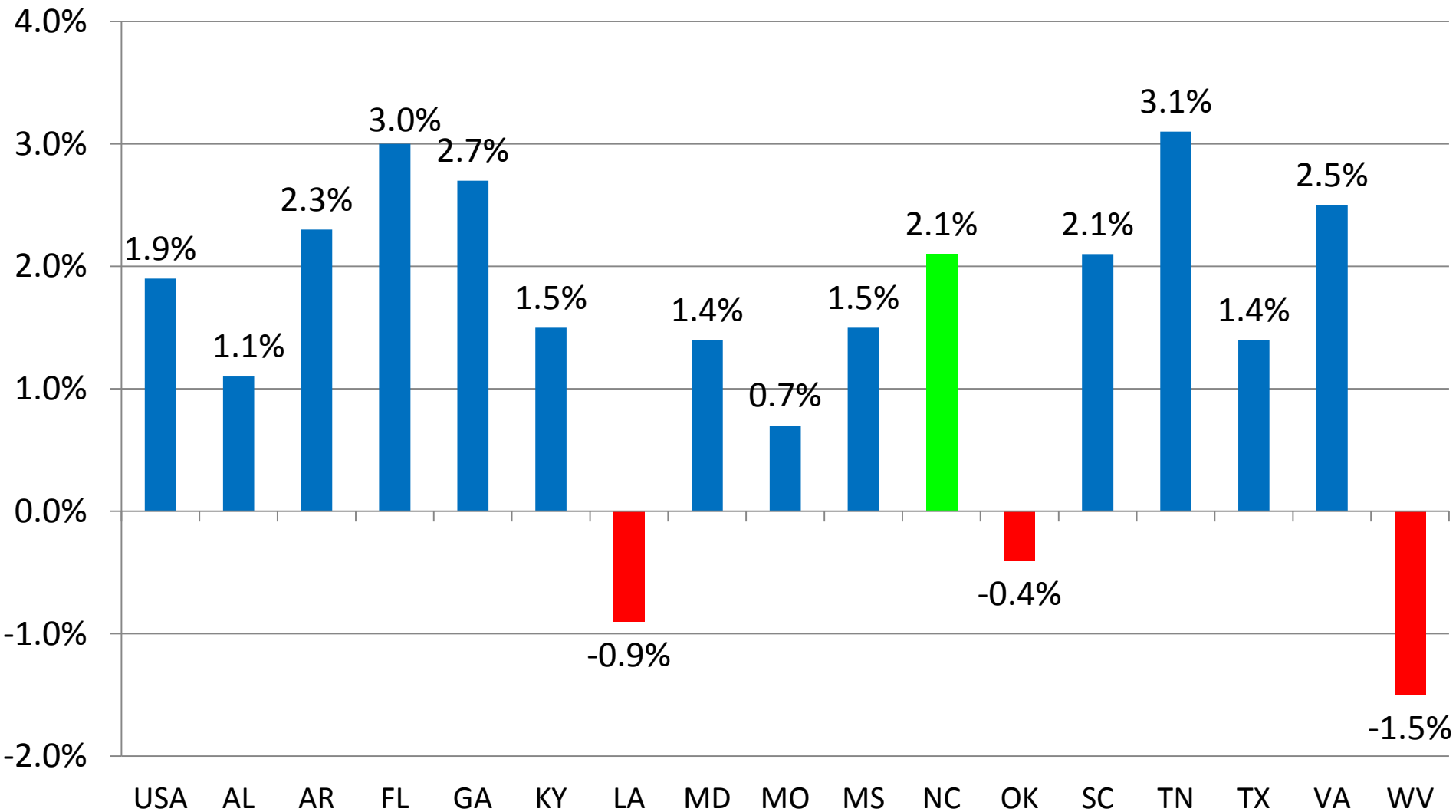
North Carolina Vision 2030

Spreading Economic Opportunity Across the State



Southern States 1-Year

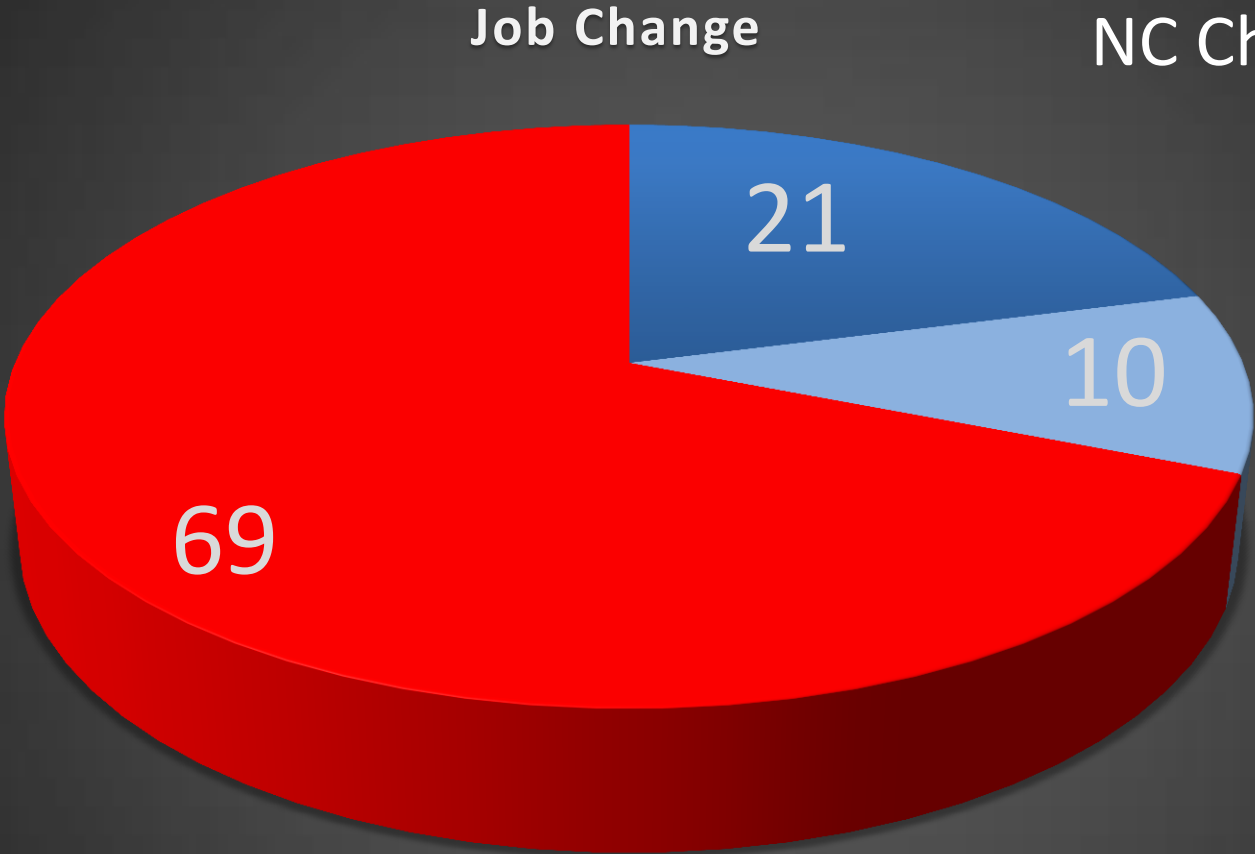
Employment Change Feb 2015 to Feb 2016



Globalization
Urbanization
Automation
Consolidations

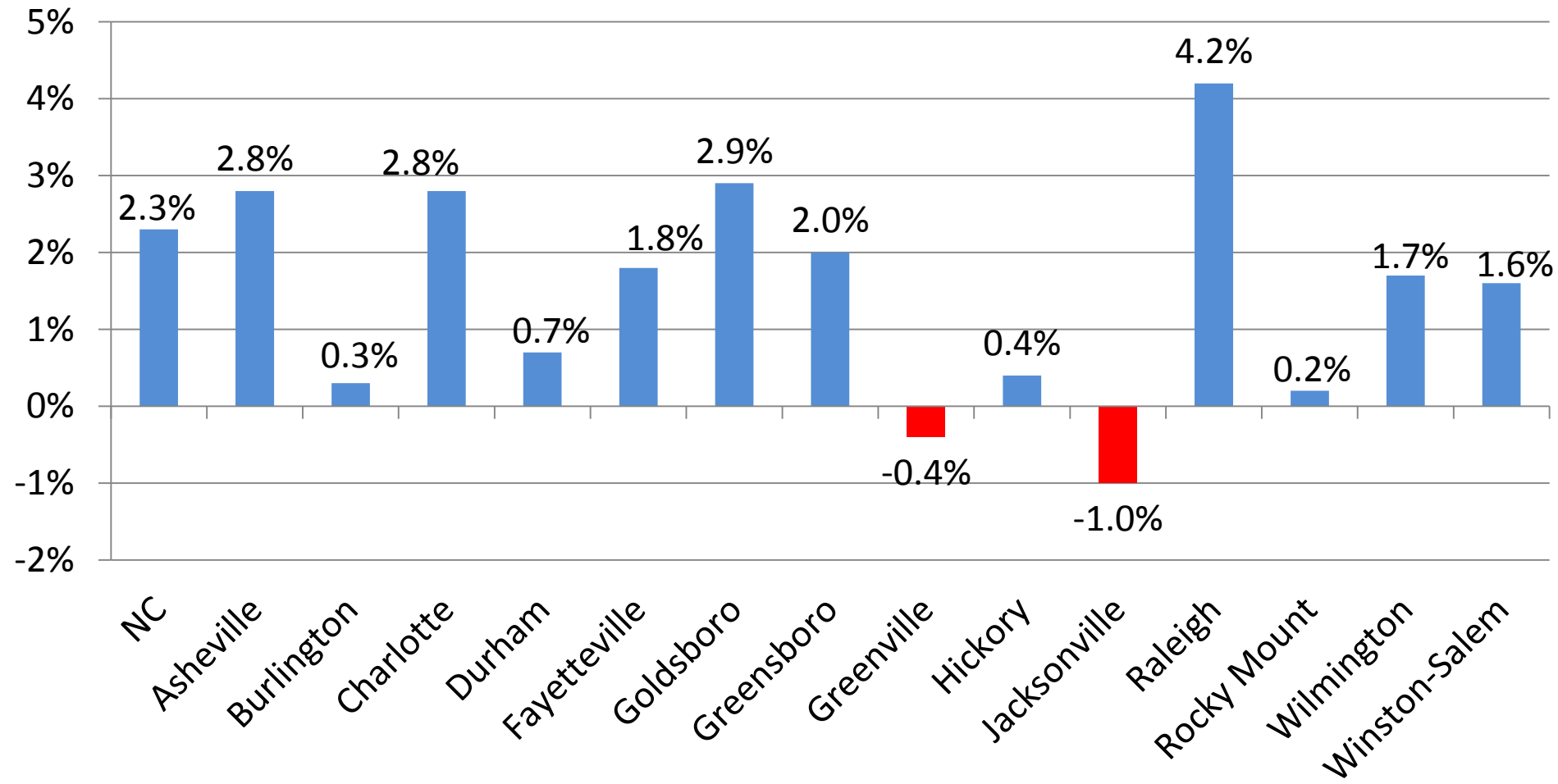


County Job Changes 2008-3rd Quarter 2015



■ Growth more than 2.8% ■ Growth, but below 2.8% ■ Fewer jobs today than in 2008

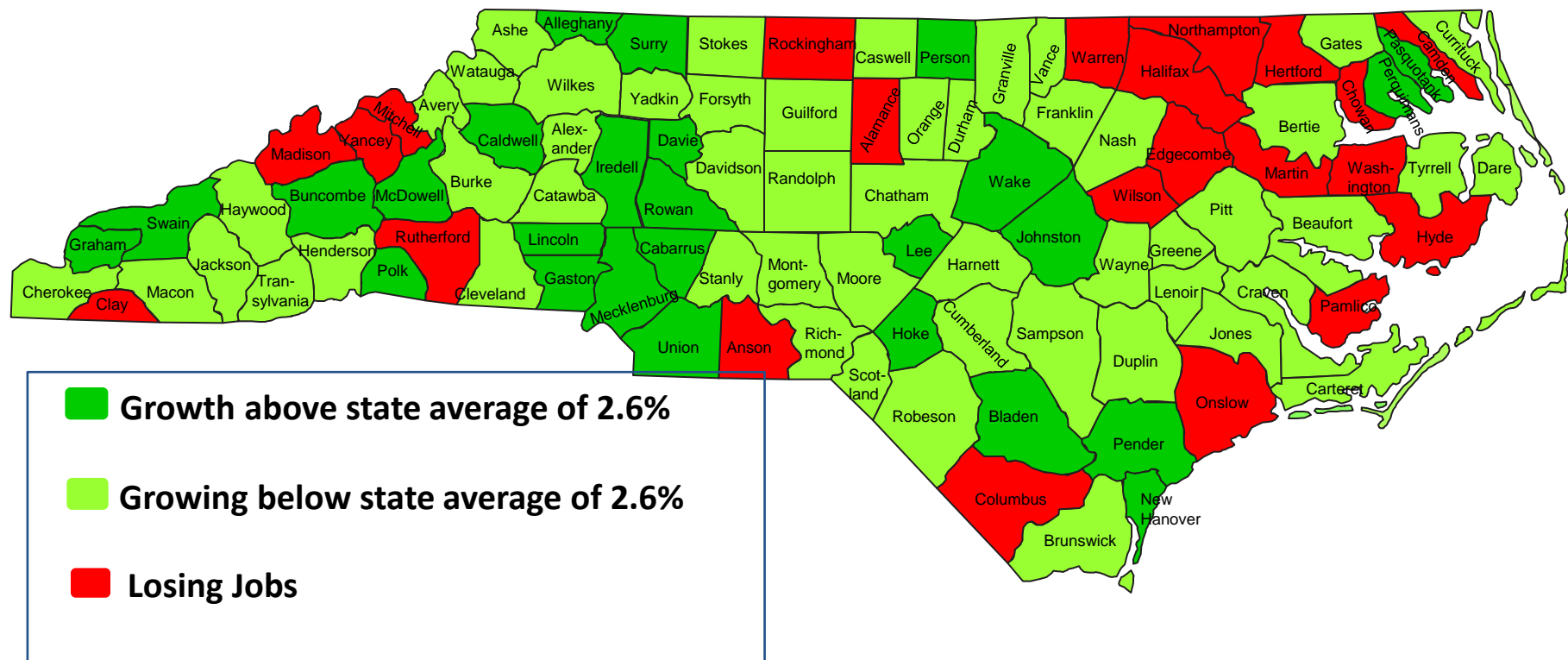
North Carolina Metro Employment Growth January 2015- January 2016



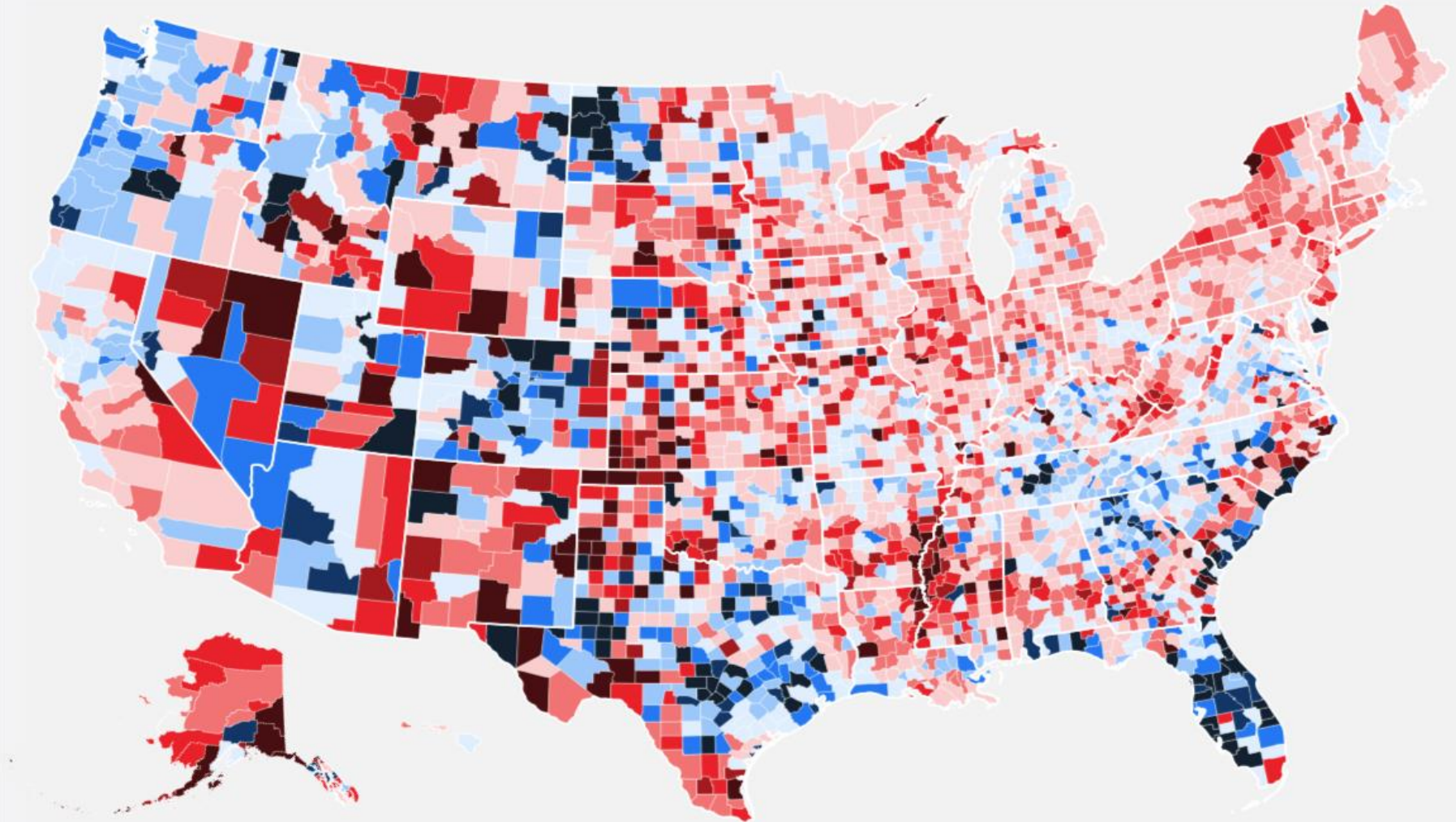
CHANGE IN AVERAGE NUMBER OF JOBS

September 2014 to September 2015

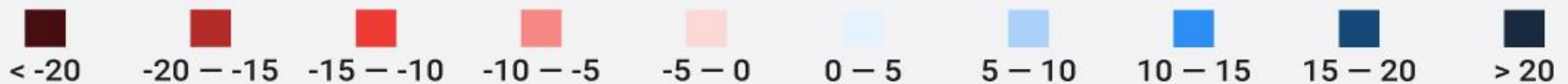
North Carolina state average 2.6%



NET DOMESTIC MIGRATION, 2014-2015



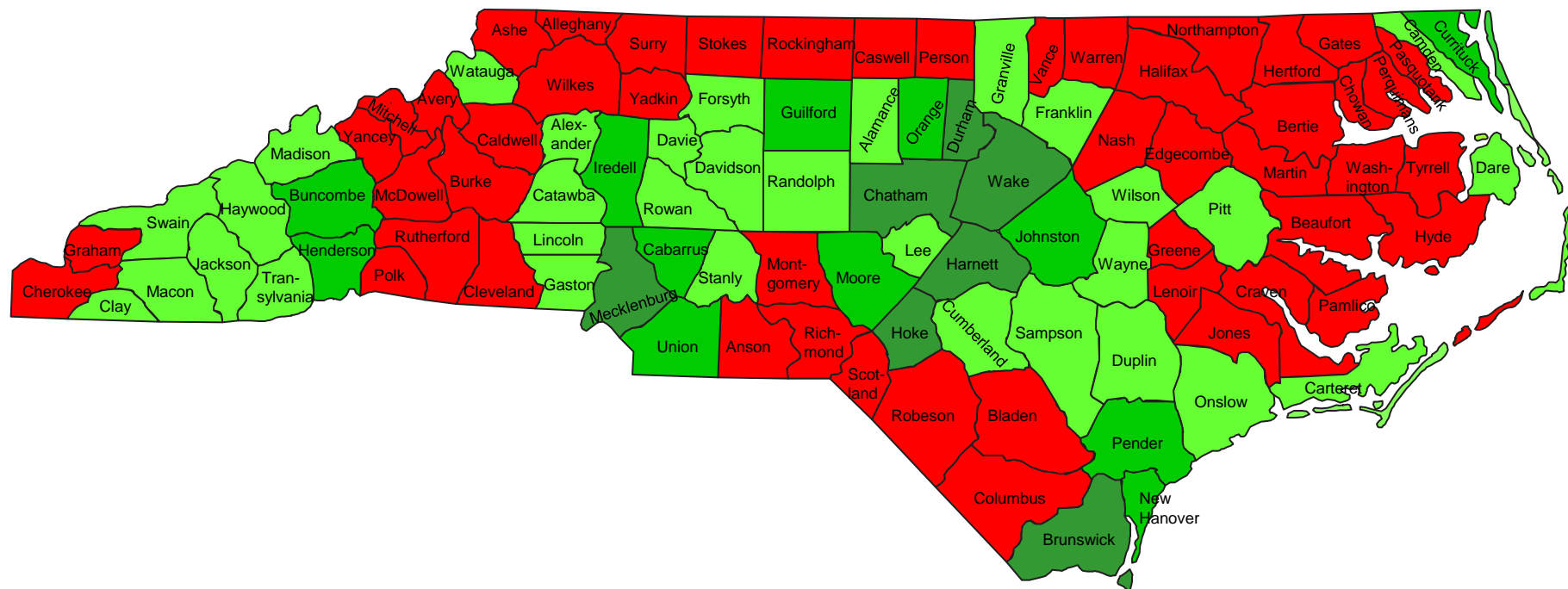
NET DOMESTIC MIGRATION PER 1,000 2014 RESIDENTS



North Carolina Change in Population

2010 to 2015

North Carolina Average 5.3%

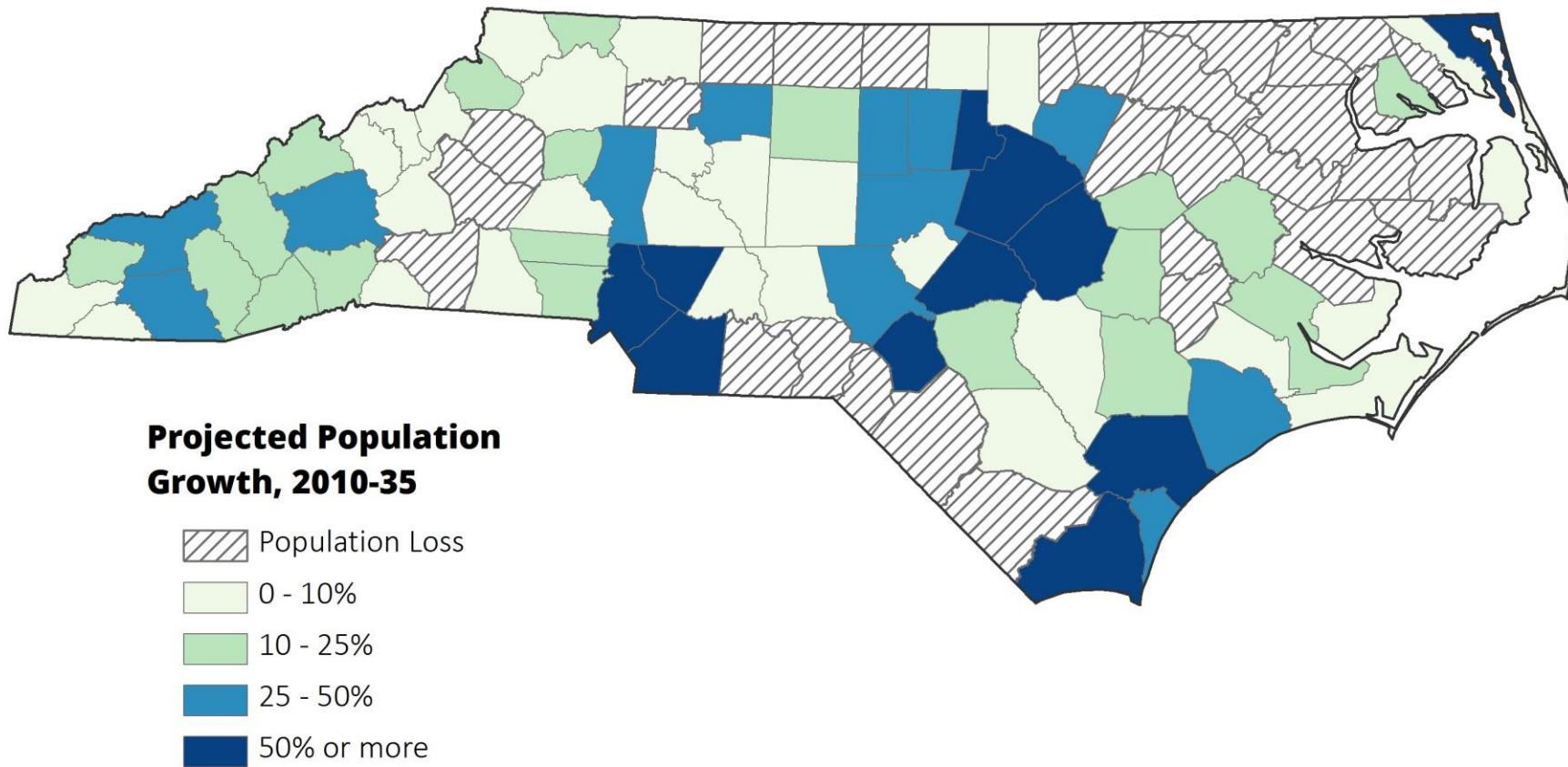


- 10.6% and over increase
- 5.3% to 10.5% increase
- 0.1% to 5.2% increase
- population decrease

Source: US Census
<http://factfinder.census.gov>

Population Growth Will Be Uneven Across North Carolina

Projected population growth, 2010-2035





North Carolina Vision 2030:

Four Pillars of a Secure Future



A Plan for Accelerating Job Growth and Securing North Carolina's Future

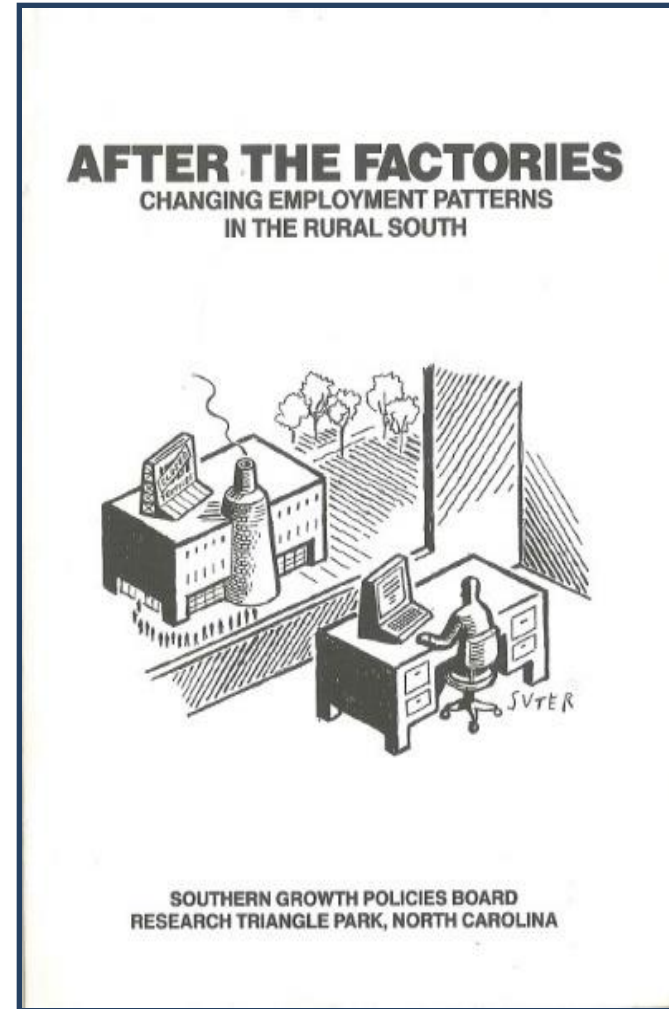
What Can Be Done to Extend Prosperity to More Places?

- Research/Report Review
- Data Analysis
- State Listening Tour



2000 Rural Prosperity Task Force Report

- **Rural North Carolina is facing significant- and irreversible- long term challenges.** The impacts of globalization on textiles, apparel, and agriculture, weakened the economic fabric of many rural communities.
- **One size doesn't -and shouldn't fit all.** Rural communities have different strengths and weaknesses and indeed different economies.
- **Education-at every stage of life- is the key to success of rural North Carolina.** The skills needed to remain competitive are rapidly changing and all our institutions need to be committed to helping our citizens prepare.
- **Taking a regional approach to economic development is hard. And it works.**
- **Rural North Carolina matters- to our entire state.**





Top Factors for Companies Considering New Investment

- 1) Availability of **skilled** labor
- 2) Highway accessibility
- 3) Quality of Life
- 4) Occupancy or construction costs
- 5) Availability buildings
- 6) Labor costs
- 7) Corporate tax rate
- 8) Proximity to major markets
- 9) State & Local Incentives
- 10) Energy availability and costs
- 11) Tax exemptions
- 12) Expedited or “fast track” permitting



Corporate CEOs

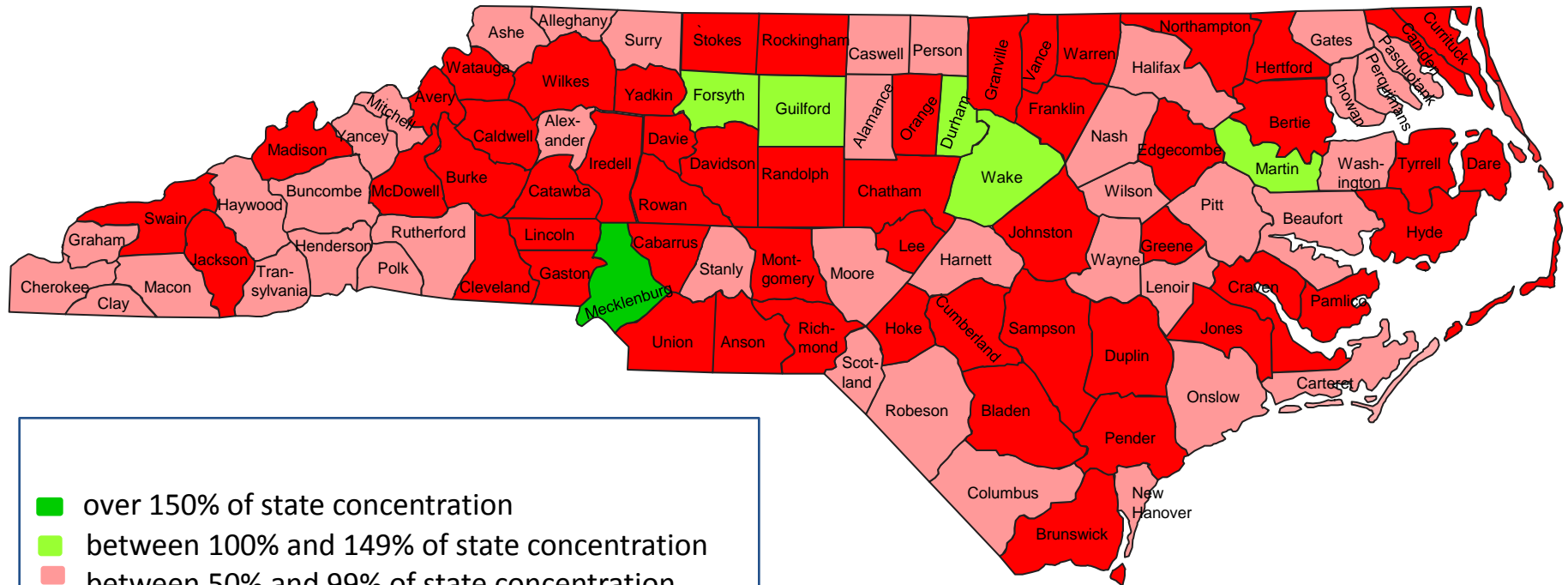
The Established Policies include:

- Education and workforce training
- Infrastructure, including telecommunications
- Targeted business recruitment and retention
- Value-added agriculture and increased agriculture exports
- Supporting industry clusters
- Promoting regional thinking and planning
- Social supports, such as health care, child care, and housing

The Emerging Policies include:

- Promoting innovation, technology, and clusters of knowledge
- Support for small business entrepreneurship and self-employment (including access to capital)
- Better linkages with urban centers and the global economy
- Focus on quality of life & “placemaking”
- Recruiting people – the creative class, immigrants, retirees
- Development of new leadership and rural community capacity to act

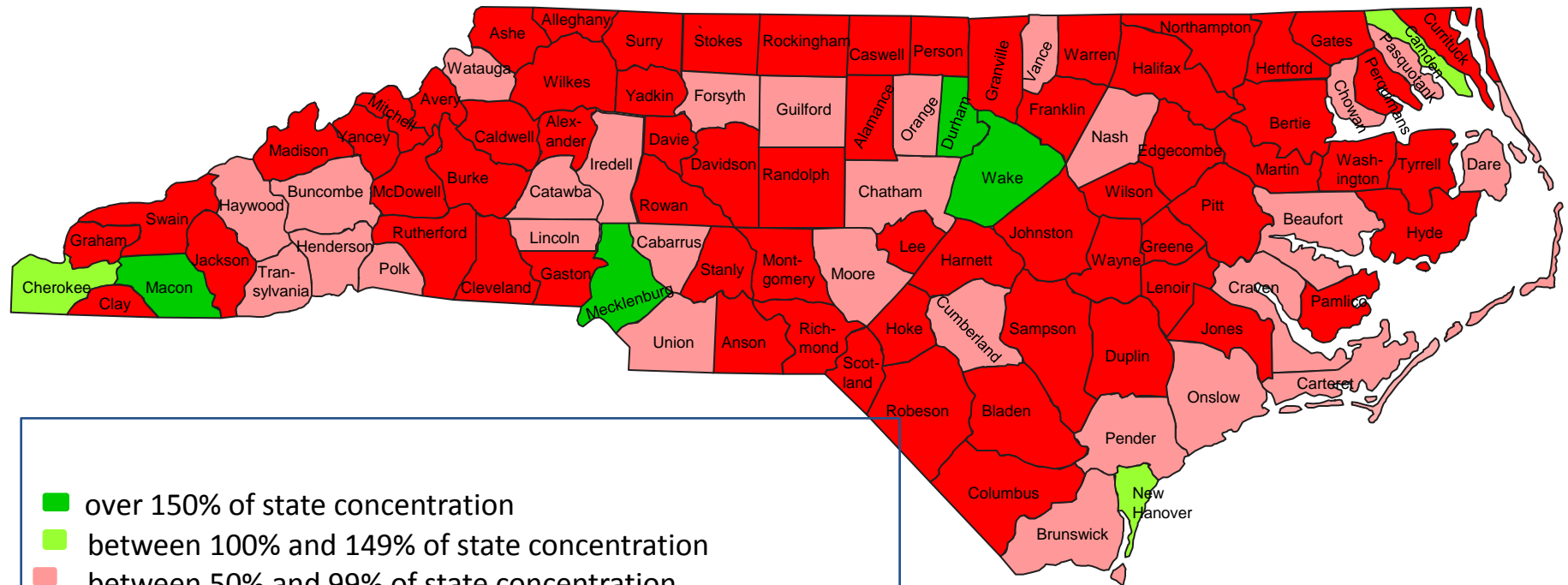
Concentration of County Jobs in Finance and Insurance



- over 150% of state concentration
- between 100% and 149% of state concentration
- between 50% and 99% of state concentration
- under 50% of state concentration

Finance and Insurance represents 3.60% of North Carolina jobs

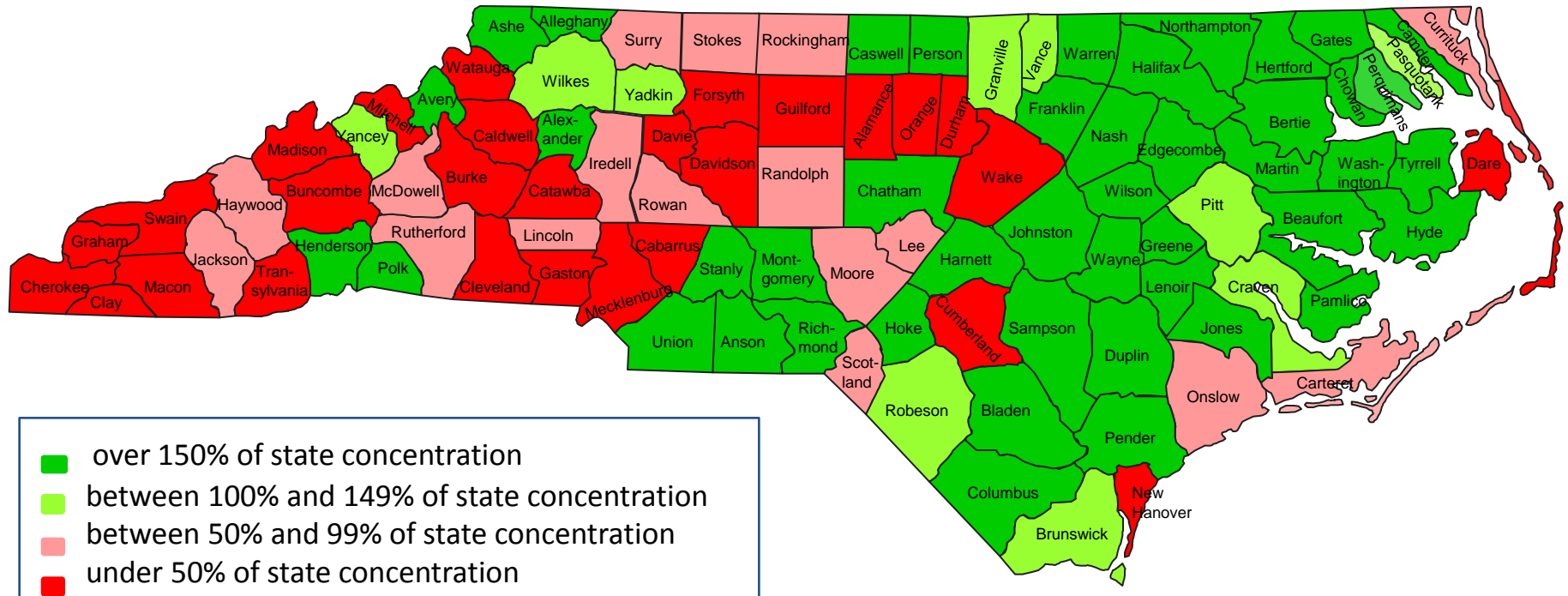
Concentration of County Jobs in Professional, Scientific and Technical Services



- over 150% of state concentration
- between 100% and 149% of state concentration
- between 50% and 99% of state concentration
- under 50% of state concentration

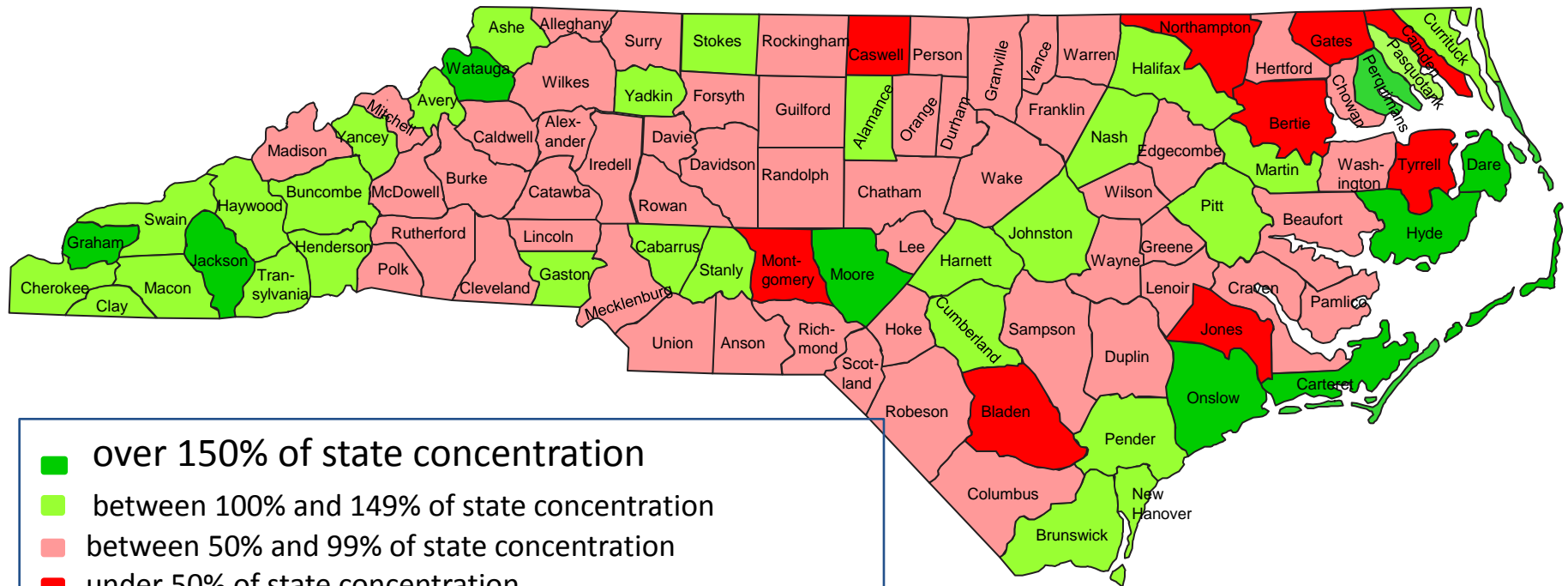
Professional, Scientific and Technical Services represents 4.93% of North Carolina jobs

Concentration of County Jobs in Agriculture, Forestry, Fishing



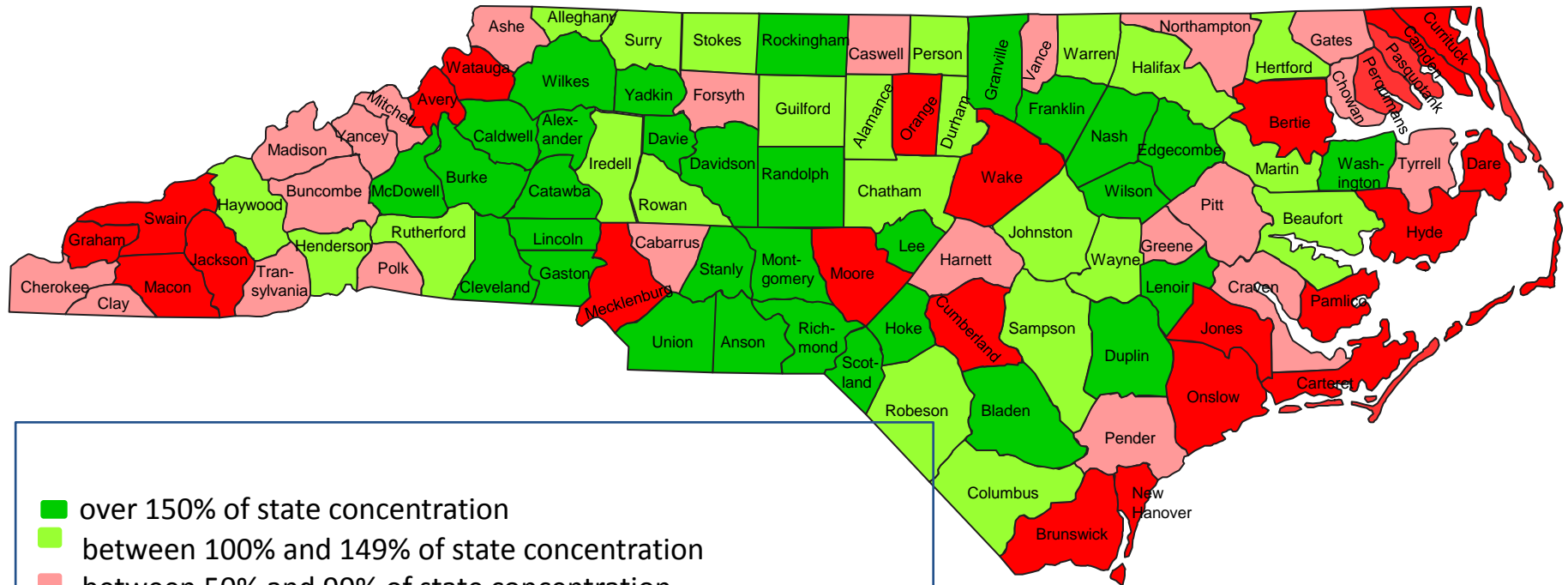
Agriculture, Forestry and Fishing represents .73% of North Carolina jobs

Concentration of County Jobs in Accommodation and Food Service



Accommodation and Food Service represents 9.83% of North Carolina jobs

Concentration of County Jobs in Manufacturing



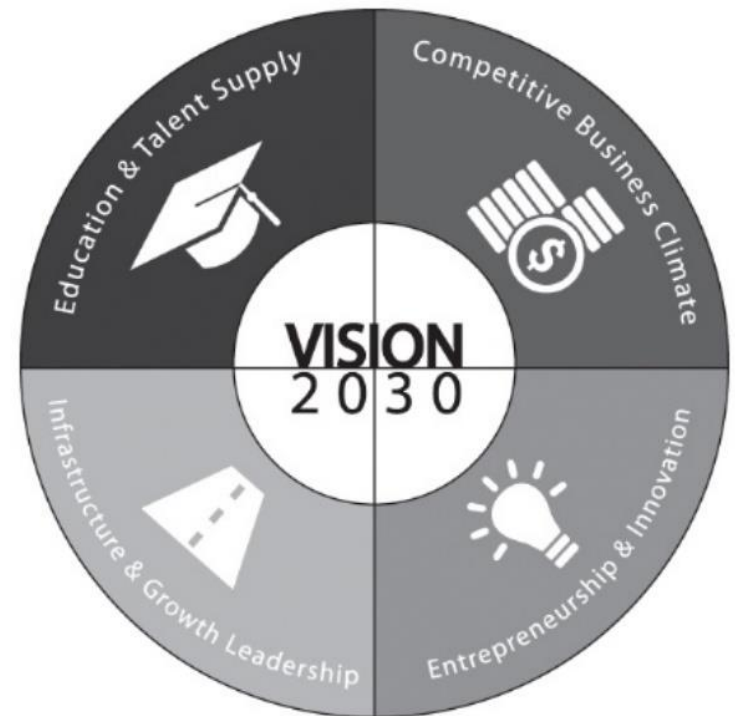
- over 150% of state concentration
- between 100% and 149% of state concentration
- between 50% and 99% of state concentration
- under 50% of state concentration

Manufacturing represents 11.21% of North Carolina jobs

Private-Public Strategies to Spread Economic Opportunity Across NC

The North Carolina Opportunity Package

- Building more competitive communities
- Help communities help themselves
- Public-Private collaboration
- Scale proven best practices
- Regionalism
- The importance of local leadership
- Strategy and action
- Improve work force readiness, infrastructure and the business climate.



Certified Work Ready Communities
Apprenticeships
STEM
Guidance Counselors

Rural Incentives
Agriculture Value Chain
Targeted Marketing
Tax Repeal
Permitting Speed



Atlantic Coast Pipeline
Broadband
Product Fund
Tourism/Entrepreneur Fund
Healthcare Professionals

Business Support
Best Practices
Rural Plan/Act Support
Leadership Training