



Comprehensive Economic Development Strategy

Southeastern Economic Development Commission

Table of Contents

Background	1
What is a Comprehensive Economic Development Strategy?	1
Introduction	1
CEDS Strategy Committee	3
Vision	2
Summary	2
Demographic and Socioeconomic Data.....	3
Workforce	9
Transportation.....	12
Military	12
Economy.....	12
Opportunity Zones.....	14
Strengths, Weaknesses, Opportunities, and Threats Analysis.....	16
Regional and County Data Sheets	18
Economic Resilience	32
Strategic Direction	37
Action Plan.....	37
Goal 1: Support strategic and sustainable growth across the region to attract population to rural communities and manage population growth in urban areas.	37
Goal 2: Build on competitive advantages while supporting a resilient business environment	40
Offshore Wind Energy	44
Goal 3: Investment in the connectivity and infrastructure of the region	46
Goal 4: Support the vitality of our diverse communities.....	49

Goal 5: Develop a sustainable and inclusive workforce for the future	52
Goal 6: Encourage collaborative economic partnerships to promote innovation and entrepreneurship to support the growth and expansion of the business community and attract new employers to the region	56
Evaluation Framework.....	63
Specific Measurable Targets	65
Acknowledgements	67
References	68
Appendix 1 Top Employers in Each County	71
Appendix 2: Business Needs Questionnaire: Business Information	77
Appendix 3 NC Business Pulse Survey.....	78
Appendix 4 CEDS Pandemic Response	82
Appendix 5: Percent Income Spent on Housing	115
Appendix 6: Housing Snapshots	119

Background

What is a Comprehensive Economic Development Strategy?

A Comprehensive Economic Development Strategy is designed to bring together the public and private sectors to create an economic roadmap to diversify the region's economy. The CEDS should:

- Analyze the regional economy
- Serve as a guide for establishing regional goals and objectives
- Develop and implement a regional plan of action
- Identify investment priorities and funding sources
- Integrates a region's human and physical capital planning in the service of economic development
- Provides the flexibility to adapt the region to global economic conditions by fully utilizing its unique advantages to maximize economic opportunity for its residents by attracting private investment that creates jobs for the region's residents
- Results from a continuing economic development planning process with broad-based and diverse public and private sector participation
- Sets forth the goals and objectives necessary to solve the economic development problems of the region

Finally, a CEDS provides a useful benchmark by which a regional economy can evaluate opportunities with other regions in the national economy.¹

Introduction

The Southeastern Economic Development Commission (SEDC), was established in 1968 and designated as an Economic Development District (EDD) by the U. S. Department of Commerce Economic Development Administration (EDA), as authorized under Title IV of the Public Works and Economic Development Act of 1965, to foster and promote economic growth in twelve southeastern North Carolina counties.

The SEDC strives to create new jobs, retain existing jobs, and stimulate economic and industrial growth in the region. Because of the financial need for projects such as public facilities and infrastructure, the SEDC assists its member county governments with project development necessary for the solicitation of grant funding from the Economic Development Administration (EDA). By providing economic education and assistance, assembling EDA investment applications, and assisting in overall regional project work, the SEDC continuously enhances the quality of life for all residents of the

District. Since 1968, the SEDC has facilitated over \$87.3 million in EDA financial assistance for public infrastructure and planning projects.

As required by the EDA, the SEDC completes a regular Comprehensive Economic Development Strategy (CEDS). Completing the CEDS process maintains the District's eligibility for EDA funding, a major source of infrastructure grants. This CEDS should be viewed as a living document that invites revisions and refinements as economic conditions in the SEDC region change. The regional CEDS Strategy Committee and other partners should meet regularly to track implementation progress and performance metrics to adapt as needed.

The SEDC region consists of twelve counties in the extreme southeastern corner of North Carolina. These counties include Bladen, Brunswick, Columbus, Cumberland, Harnett, Hoke, New Hanover, Pender, Richmond, Robeson, Sampson, and Scotland. This region is one of the largest Economic Development Districts in North Carolina. Its size and geographic location make it very diverse, extending from the coastal plain to the piedmont. The local economies range from the two metropolitan areas— Fayetteville which includes Fort Bragg—and Wilmington on the coast. The counties in between these two designated metro areas are more rural.

In February 2015, the EDA released new guidelines for creating an impactful CEDS. This five-year plan follows the new guidelines imposed by the EDA. The CEDS is a strategy-driven plan for regional economic development that provides the capacity-building foundation by which the public sector, working in conjunction with the private and nonprofit sectors, creates an environment for regional economic prosperity. This plan is comprised of four main elements as required by the EDA:

1. Summary Background of economic conditions of the region
2. SWOT Analysis to identify the regional strengths, weaknesses, opportunities, and threats
3. Strategic Direction or Action Plan to build on findings from the SWOT analysis and incorporate elements from other regional plans
4. Evaluation Framework to include performance measurements to evaluate the implementation of the CEDS and its impact on the regional economy

The SEDC CEDS aligns with the NC Tomorrow: North Carolina Regional and Statewide Strategies for Comprehensive Community and Economic Development that identifies regional and State priorities for resilient economic and community development.² A key element in the process is the CEDS Strategy Committee that broadly represents the main economic interests of the region. The CEDS Strategy Committee was formed in June 2022 and met from June through December to complete the plan. Throughout the region, four public meetings were facilitated to conduct the SWOT analysis to help

shape the vision, goals, objectives, and strategies for the plan. The 30-day public comment period was held from October 24, 2022, to November 22, 2022, to seek stakeholder input and public comments.

CEDS Strategy Committee

A Strategy Committee was established to assist in the development and review of the CEDS and to offer advice and counsel to the Project Team. This Committee is comprised of the major economic partners of the region, including private and public sector representatives, public officials, community leaders, representatives of institutions of higher education, minority groups, and private individuals.

- Stephen Barrington, Sampson County Economic Development Commission *
- Martie Butler, Richmond County Economic Development Commission *
- Amy Cannon, Cumberland County *
- Tony Harrington, The Property Shop International Realty *
- Justin Hembree, Mid-Carolina Council of Governments
- Chuck Heustess, Bladen County Economic Development Commission - Bladen's Bloomin' Agri-Industrial, Inc. *
- Suzy Hrabovsky, Center for Economic Empowerment & Development
- Randall Johnson, North Carolina Biotechnology Center - Southeastern Office
- Mark Lanier, University of North Carolina at Wilmington
- Grace Lawrence, North Carolina Department of Commerce - Community Economic Development Planner
- Christian Lockamy, Harnett County Economic Development Commission *
- Gregory McElveen, Fayetteville State University
- Gwen McGougan, Hoke County *
- William McInnis, Richmond Community College
- Jackie Newton, Pender County *
- David Richardson, Lumber River Council of Governments
- Judy Sampson, Robeson County Board of Commissioners *
- Allen Serkin, Cape Fear Council of Governments
- Jimmy Smith, Four County Electric Membership Corporation - Economic & Community Development
- Justin Streuli, University of North Carolina at Wilmington
- Mark Ward, Scotland County Economic Development Commission *
- Steve Yost, The Southeastern Partnership, Inc.
- Mark Zeigler, North Carolina Department of Commerce - Rural Economic Development Division
- Bill Early, Brunswick County Economic Development Commission *

- Gary Lanier, Columbus County Economic Development Commission *

- Elizabeth Wilkerson, SBTDC Cape Fear Regional Center Director

* Indicates SEDC Board members

Vision

To increase economic vitality and regional prosperity by being a globally competitive, business-friendly region which includes a diverse workforce, resilient and healthy communities with viable employment opportunities, lifelong education and training opportunities, sustainable natural resources, an integrated infrastructure, smart growth, and coordination among economic development efforts throughout the region that sustains a high quality of life for all citizens

Figure 1 Wilmington Port (courtesy of the Brunswick Business & Industry Development)



Figure 2 Southeastern Economic Development Commission region

Summary

This plan is designed to guide economic development efforts across the 12-county SEDC region over the next five years. The five goals in this CEDS – population growth, competitive advantages, connectivity and infrastructure, place, talent, and lastly, innovation and entrepreneurship - are intended to complement each other to create a holistic approach to economic development. This plan meets the EDA's CEDS requirements and is designed with the flexibility to allow regional leaders to act swiftly as economic conditions change. This adaptability will require local organizations to forge

and maintain cross-sector partnerships and to collaborate effectively. Whether building a more competitive local talent pool, supporting innovative entrepreneurs, or leveraging funding opportunities, regional collaboration and coordination will be essential to the successful implementation of the CEDS.

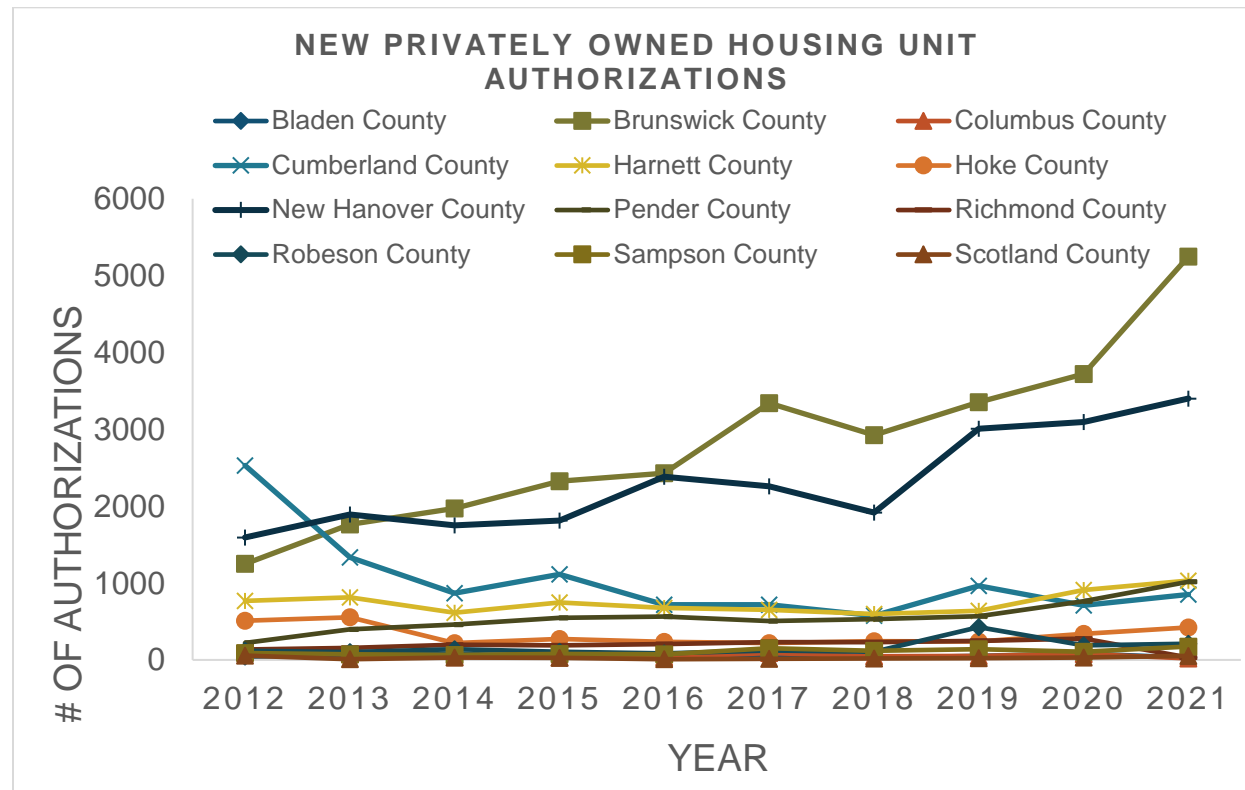
Demographic and Socioeconomic Data

Over 1.3 million people live in the region and its growing population includes newly arriving residents from around the world at all stages of life and career. The population of the twelve-county region grew by an estimated 9 percent from 2010-2020, from 1,228,074 to 1,317,610. By the year 2030, the population of the region is expected to grow by 151,862 people expanding to 1,469,472 people.³ The majority of this increase is attributable to five counties: Brunswick, Harnett, Hoke, New Hanover, and Pender. Growth has not been consistent across the region. Brunswick, a coastal county, experienced the largest estimated rate of growth at 22 percent from 2010 to 2020. The remaining four counties grew similarly: Harnett (14%), Hoke (11%), New Hanover (10%), and Pender (13%). These are the same counties that experienced a 20 percent growth rate from 2000-2010. Most of these counties are located within Wilmington MSA where growth has been the strongest. As a result of the 2010 Census, Brunswick County was shifted from the Wilmington MSA to the Myrtle Beach (SC) MSA. Historically, Brunswick has been in the Wilmington MSA, and since Horry County, SC is not in the SEDC planning area, the Myrtle Beach MSA is not referenced in this plan.

Rates of growth in most of the rural interior counties have been negligible. The counties of Bladen, Columbus, Richmond, Robeson, and Scotland experienced an estimated population loss. Richmond County had the most significant population loss of 9 percent from 2010 to 2020. Projected population growth estimates continue this trend.

Population trends can be seen in applications for construction permits in Figure 2. For the last ten years, private construction single-family and multifamily permit applications have increased for Brunswick, New Hanover, and Pender counties but have remained flat or decreased for the rest of the region. The value of those proposed projects represents investments of \$1.2 billion, \$800 million, and \$200 million in Brunswick, New Hanover, and Pender counties respectively.

The racial makeup of the region is fairly consistent by county with a majority white population (60%), followed by African Americans (25%), Hispanics or Latinos (9%), and American Indians (6%). Robeson County is the exception among the twelve counties with a majority American Indian population (40%) followed by whites (27%) and African Americans (24%) making it the only truly tri-racial county in the region and the State. American Indians, primarily members of the Lumbee Tribe, grew to be the majority population during the 1980s.

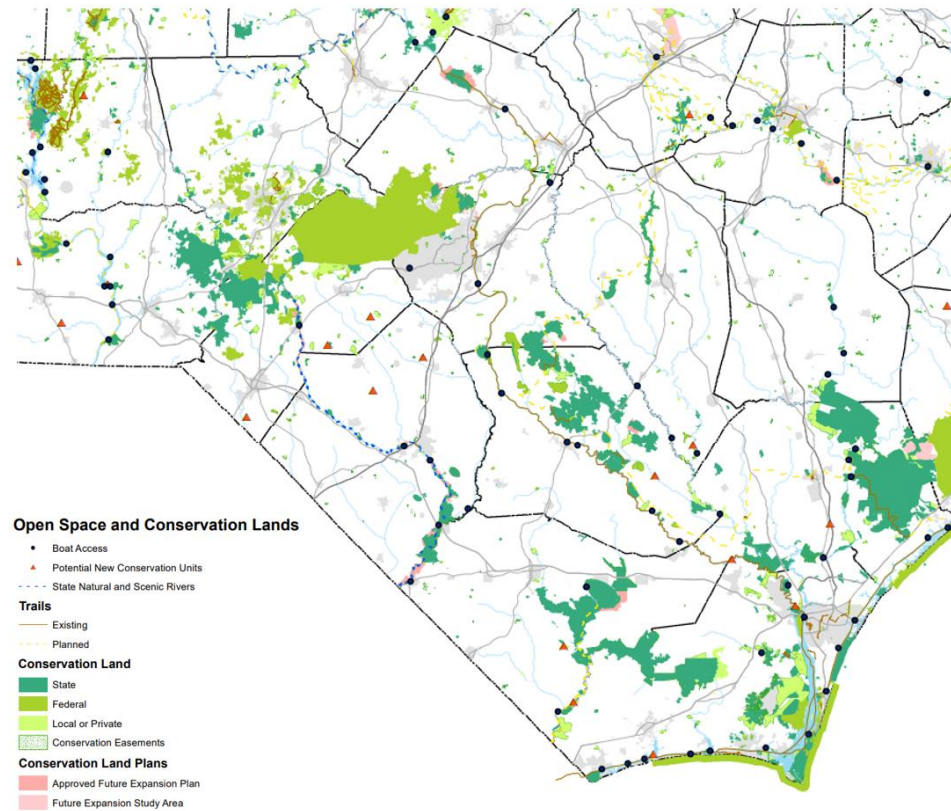
Figure 2 Permit applications by County

The most remarkable demographic change in the population is found in the changing age distribution. In 2010, an estimated 154,672 persons were counted as age 65 and over in the SEDC region. That number grew to 225,317 in 2020, representing a 46% increase. The 65 and over cohort is projected to grow to 298,529 by 2030.

In 2020, the poverty rate in the SEDC region, NC, and the USA was 18%, 14%, and 13% respectively.³ About 232,814 persons had incomes below the poverty level. Some communities remain disconnected from jobs, growing industries, and the networks and infrastructure that connect residents to economic opportunity. For generations, some communities have been unable to access the resources that support mobility and prosperity, making it difficult to escape economic hardship. The result is persistent poverty. Bladen, Columbus, and Robeson are among the State's ten counties that experience persistent poverty.

The region has ample historic sites, trails, and museums dedicated to cultural heritage. Larger cities and small towns alike offer opportunities for entertainment and enrichment in the realm of art, heritage, military, science, and many other areas. Festivals and events are held throughout the year in cities and communities all across the region. Many colleges and universities in the region have performing arts that feature performers and speakers of national and international renown. Several cities also have regional theaters, symphonies, and local arts councils.

Figure 3 Open Space and Conservation Lands



Evident from Figure 5, the region includes state parks, lakes, rivers, fertile farms, and pine-covered woodlands.⁴ The condition of the natural environment impacts public health, economic and recreational opportunities, and quality of life for residents and visitors. Protection and wise use of the natural environment—air, land, and water resources—are essential

to support the economic growth and development of the region now and for future generations. Within the region, there are approximately 1.2 million acres of forested land. As is true for NC in general, the majority of that—76%—is privately held. Forest resources in the region support wildlife habitats and offer numerous recreation opportunities. They also support jobs and incomes in the region. Two major rivers traverse the region—the Cape Fear and the Lumber. The Lumber River is the only State and Federally designated River in the region. It was established in 1989 as both a state park and designated as a Natural and Scenic River by the North Carolina General Assembly. In addition, it is the only blackwater river in North Carolina to be designated as a National Wild and Scenic River by the US Department of the Interior.

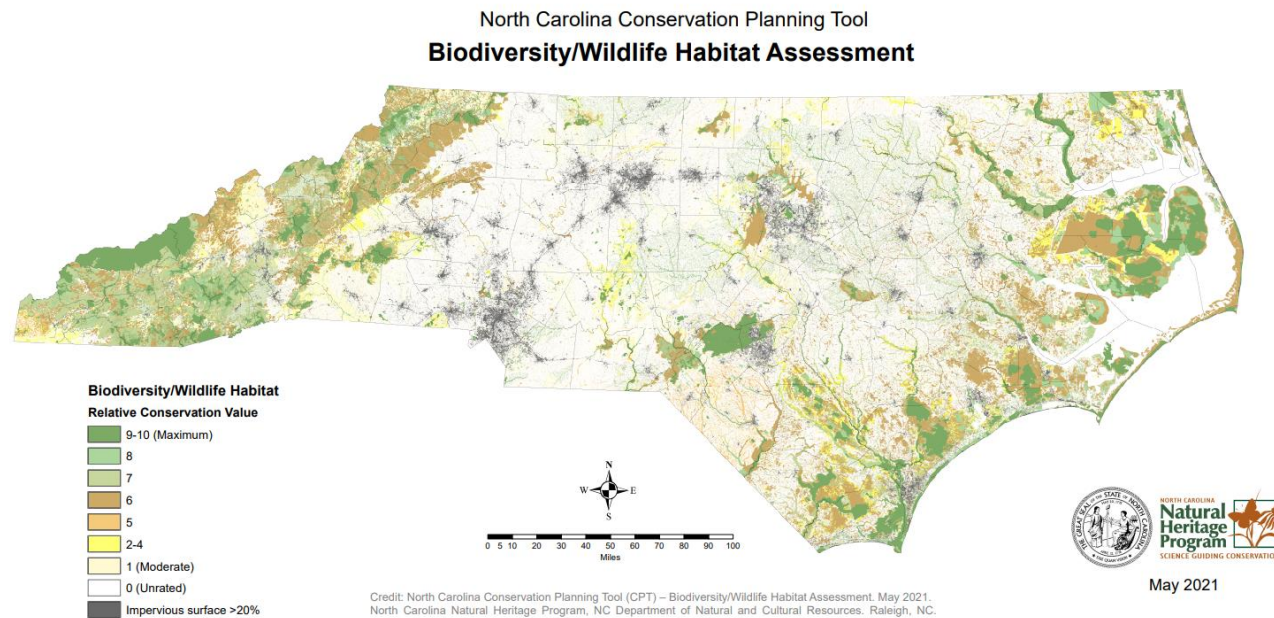
Figure 4 NC Agricultural Lands⁵

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The Cape Fear River is also a blackwater river but does not have the Federal designation. The Cape Fear headwaters are located near Greensboro and Cape Fear flows into the Atlantic Ocean near Cape Fear, a prominent headland, from which it takes its name. A series of locks and dams, all located in Bladen County, make the river navigable from Wilmington to Fayetteville. Opportunities for boating, fishing, swimming, canoeing, and other recreational activities are available along its entire length.

Pender, New Hanover, and Brunswick counties include miles of Atlantic shoreline and numerous towns that have built upon the ocean amenities. In addition to the beachfront, this coastal region also includes wetland areas which are also major natural attractions for people and wildlife alike. The temperate climate, abundant waterways, stimulating historical attractions, and outdoor recreational amenities produce an enviable quality of life for those who live and work in the region.

Figure 5 Biodiversity and Wildlife Habitat Assessment⁶



North Carolina Department of Agriculture and Consumer Services has developed an online map viewer to display data from the Agricultural Assessment. This assessment is comprised of three evaluations: Government Policy, Agribusiness

Infrastructure, and Soils. According to Figure 6, the SEDC contains land that is considered the highest priority for the conservation of working farmland. Almost all SEDC counties contain Tier 1, 2, and 3 parcels, with Tier 1 being the highest priority.

Figure 7 depicts the May 2021 results from the Biodiversity and Wildlife Habitat Assessment which was developed by the N.C. Natural Heritage Program. It provides information about the relative priority of aquatic and terrestrial habitats, landscape function, and connectivity. Similar to the high conservation value of the SEDC region's agricultural land, the region contains large tracts of land that score high on wildlife and biodiversity measures and consequently are designated as a high conservation priority.

Figure 6 Veterans Hall (Courtesy of UNCW)



Workforce

The region's workforce, which now numbers nearly 575,000, includes a diverse cross-section of workers in agriculture, manufacturing, wholesale trades, construction, healthcare, and government. The largest private employers include Cape Fear Valley Health Systems, Food Lion, Goodyear Tire & Rubber, Lowes Home Centers, Mountaire Farms of NC, New Hanover Regional Medical Center, Pharmaceutical Product Development, Progress Energy, Perdue Farms, Smithfield Foods, and Wal-Mart. The SEDC's top public and private industries (2-digit NAICS codes) are listed in Table 1 below. The table includes the forecasted annual growth of each industry for the next 10 years. The ten largest employers in each county are included in Appendix 1.

Table 1 SEDC Region's Top Industries (1st Quarter, 2022) ⁷

Industry	Employment	Avg. Ann. Wages	Location Quotient	Annual Demand	Forecasted Annual Growth
Health Care and Social Assistance	74,699	\$56,458	1.10	8,174	1.4%
Retail Trade	62,338	\$32,501	1.28	8,196	-0.2%
Accommodation and Food Services	49,500	\$20,267	1.28	9,586	2.4%
Manufacturing	40,802	\$56,140	1.07	4,123	-0.2%
Educational Services	39,235	\$46,733	1.05	4,066	0.9%
Public Administration	33,541	\$57,282	1.52	3,233	0.3%
Construction	30,098	\$50,795	1.09	3,146	0.8%
Administrative and Support and Waste Management and Remediation Services	27,248	\$35,718	0.90	3,441	1.0%
Professional, Scientific, and Technical Services	22,554	\$77,230	0.67	2,258	1.3%
Other Services (except Public Administration)	20,725	\$27,749	1.02	2,585	1.3%
Remaining Component Industries	68,970	\$58,694	0.61	7,961	0.7%
Total - All Industries	469,709	\$47,500	1.00	55,626	0.9%

Educational attainment is positively correlated to an individual's wage-earning capacity. Advancing the level of education in the population leads to better economic outcomes for individuals and the communities in which they live. Educational attainment is advancing in the region. The percentage of the population 25 years and older with less than a high school education and without a diploma decreased in the period from 2010 to 2020. During the same timeframe, the percentage of the population with Associate's, Bachelor's, and Graduate degrees increased.

The SEDC region is rich in higher education and includes the following colleges and universities:

- Bladen Community College
- Brunswick Community College
- Campbell University (Harnett County)
- Cape Fear Community College (New Hanover County)
- Central Carolina Community College (Harnett County)
- Fayetteville State University (Cumberland County)
- Fayetteville Technical Community College (Cumberland County)
- Methodist University (Cumberland County)
- Miller-Motte College (Cumberland and New Hanover Counties)
- Richmond Community College
- Robeson Community College
- Saint Andrew's University (Scotland County)
- Sampson Community College
- Sandhills Community College (Hoke County)
- Southeastern Community College (Columbus)
- UNC Pembroke (Robeson County)
- UNC Wilmington (New Hanover County)

The region's workforce development boards are critical to the region's economic success. There are three in the SEDC region:

- The Cape Fear Workforce Development Board serves Brunswick, Columbus, New Hanover, and Pender Counties. Private sector-led, the board works in collaboration with community colleges, chambers of commerce, economic development, elected officials, NC Division of Workforce Solutions, and community-based organizations to pioneer strategies that promote economic growth for the Cape Fear region. The CFWDB connects job seekers and

employers, providing skills training and work opportunities for youth and adults through a partnership with NCWorks Career Centers, and analyzes and shares data to educate the public on workforce needs.⁸

- The Lumber River Workforce Development Board serves Bladen, Hoke, Richmond, Robeson, and Scotland Counties. It manages a strategic, integrated plan that supports economic growth and labor force needs and is intended to grow the capacity and performance of the workforce system. It oversees the local service delivery system, the NCWorks Career Center, and collaborates with all workforce development partners and employers to improve the quality of the region's workforce. Lastly, the Board plans and administers the Workforce Innovation and Opportunity Acts (WIOA) funds and related workforce development activities.⁹
- The Mid-Carolina Workforce Development Board (MCWDB) was created and formed in July 2022 through strategic partnerships, long-term planning, and discussions by county leadership in Cumberland, Harnett, and Sampson counties. One of the many goals of this new MCWDB in North Carolina is to be the most innovative and performance-driven workforce development program in the State of North Carolina. The purpose of the MCWDB is to provide policy, planning, and oversight for local workforce development programs and to address workforce issues as identified by the communities that they represent. The MCWDB is responsible for designing a service delivery system that meets the needs of local businesses that are trying to find qualified applicants to fill their employment openings by providing training scholarships to those individuals who are eligible and basic employment services and referrals to those who are not. The mission is to build a competitive workforce and positively influence the economic development of our region.¹⁰

Figure 7 Maxton Town Hall (Courtesy of Grace Lawrence)



Transportation

The region has a unique network of transportation assets that spurs economic advantages. The Port of Wilmington, the region's "gateway of the global economy", connects firms across the state to buyers and suppliers around the world. Interstates 95 and 40, along with US Highway 74 form a triangle of major highway access across the region.

Two of the Nation's premiere freight railway companies serve this region—CSX Transportation and Norfolk Southern. The region is home to several smaller short-line rail companies—Aberdeen & Rockfish Railroad, Carolina Southern Railroad, and Laurinburg & Southern Railroad.

Recently, intermodal rail service returned to the Port of Wilmington with the debut of a new freight rail service, dubbed the Queen City Express. The service will allow massive containers of goods to travel from the Port of Wilmington to Charlotte and vice versa— taking trucks off the highways and perhaps further incentivizing new business in the region and state.

Air travel is highlighted in the region by a system of fourteen smaller airports and two major public airports offering commercial jet service, all of which are designed to accommodate private and commercial needs. Commercial jet service is provided to Wilmington International and Fayetteville Regional Airport. The Laurinburg-Maxton Airport, with its accompanying industrial development complex, is quickly evolving into a major facility and can accommodate most types of private and commercial usage.

Military

Fort Bragg was built as the first modern military base in the state in 1918. Fort Bragg makes up almost 10 percent of all US army forces. The post supports a population of roughly 260,000, including military Families, contractors, retirees, and others. It comprises a population of 53,700 troops, 12,624 Reserve Components and Temporary Duty students, 14,036 civilian employees, 3,516 Contractors, and 62,962 active duty family members.¹¹ There are 98,507 Army retirees and family members in the area. Fort Bragg covers approximately 284.5 square miles, which is over 172,000 acres, 146,000 of which are dedicated training lands.¹² Fort Bragg contains more than 1,400 miles of paved roads, 23 miles of railroad, and the Simmons and Pope army air fields. The annual base payroll is approximately \$3 billion.¹³

Economy

The diverse economy of the region includes a mix of commercial, retail, and industrial businesses augmented by tourism. North Carolina is the 6th most visited state in the country. The direct economic impact of tourist dollars spent in 2013 for New Hanover County was \$477.68 million and \$470.58 million for Brunswick County, ranking them 8th and 10th in the State for 2013.⁵

North Carolina's Southeast (aka, The Southeastern Partnership and The Southern Partnership) is a public-private partnership that works collaboratively across the region to promote the southeast NC region to a national and global audience. Its service area (18 counties) includes the SEDC region (12 counties) and 6 additional bordering counties. According to NC's Southeast's 2021-2024 Strategic Plan,¹⁴ the southeast region has established itself as a competitive area in which to do business due to key assets that span the entire 18-county region. Though some of these assets are outside the 12-county SEDC region, they still contribute to the SEDC region's economic growth. Assets that were identified in the Strategic Plan include:

- Two Ports: International Port of Wilmington and Port of Morehead City
- Strong agricultural base
- A population of 1.8+ million with a labor force of 730,000+
- Diverse industry base, including more than 30 Fortune 500 companies with a regional presence
- Certified industrial parks, including At-Port industrial sites
- Five Metropolitan Statistical Areas – Wilmington, Fayetteville, Myrtle Beach, New Bern, and Goldsboro
- Wilmington International Airport, Fayetteville Regional Airport, Albert J. Ellis Airport, Coastal Carolina Regional Airport, and the North Carolina Global TransPark
- Interstate highway network – I-40, I-95, I-295, I-73, I-74, I-140, I-795, and I-42
- Extensive rail service throughout the region provided by CSX, Norfolk-Southern, North Carolina Railroad, Aberdeen Carolina & Western Railway Company, Aberdeen & Rockfish Railroad, Gulf & Ohio Railways, Laurinburg & Southern Railroad, and R.J. Corman Railroad Group
- Seven military installations – Fort Bragg, Marine Corps Base Camp Lejeune, Seymour Johnson Air Force Base, Marine Corps Air Station Cherry Point, Marine Corps Air Station New River, Pope Army Airfield, and Military Ocean Terminal at Sunny Point
- Six major universities – UNC-Pembroke, Fayetteville State, UNC-Wilmington, St. Andrews, Methodist, and Mount Olive
- 15 Community colleges that concentrate on job skills training for existing and recruited industries
- Seven Business Incubators throughout the region
- Innovative healthcare facilities
- Dynamic quality-of-life

The economy of the SEDC region covers two metropolitan areas—Fayetteville and Wilmington. Biotechnology and life sciences are poised to experience significant growth in the region, including in the Wilmington MSA, supported by the knowledge-based workers in the area. In the Fayetteville MSA, there is a larger concentration of distribution and logistics,

and defense-related businesses supported by the military installation and access to I-95. Anchor industries such as agriculture and healthcare provide a solid foundation that continues to support the region. In the rural areas of the region, there is a greater focus on agriculture, food processing, and advanced manufacturing industries.

There has been a distinct difference in the economic growth of the urban and rural areas in the region. While larger communities have experienced rapid population and economic growth, many smaller communities have suffered job and population losses. For example, Columbus, Robeson, Sampson, and Scotland have lost jobs since 2017. In addition, Bladen, Columbus, Richmond, Robeson, Sampson, and Scotland counties are projected to have negative or flat population growth between 2020 and 2030. The urban and rural areas offer complementary assets, and better integration between them is important for the socioeconomic performance of the region. A diversified economy creates a sustainable cycle of economic activity.

Opportunity Zones

Opportunity Zones are an economic development tool that allows people to invest in distressed areas in the United States.¹⁵ Their purpose is to spur economic growth and job creation in low-income communities while providing tax benefits to investors. Opportunity Zones were created under the Tax Cuts and Jobs Act of 2017 (Public Law No. 115-97). Thousands of low-income communities in all 50 states, the District of Columbia, and five U.S. territories are designated as Qualified Opportunity Zones. The Opportunity Zones program provides investors with a tax incentive to re-invest their unrealized capital gains in “Opportunity Funds” that are specifically designed to invest in Opportunity Zones. Opportunity Zones are established based on certain criteria. In addition to being designated by the Governor, these zones must be located in qualified census tracts that meet the required levels of poverty and measures of economic distress.¹⁶ There are 252 tracts in NC that represent:

- A total population of over 1.1 million people
- Nearly 45,000 families with children in poverty
- Over 50,000 business establishments
- Over \$580 million in received public and private investments over the past 5 years.

The SEDC region contains multiple opportunity zones, at least one in each county. The following figure shows a map of opportunity zones in the SEDC region.

Figure 8 Opportunity Zones in the SEDC region¹⁷

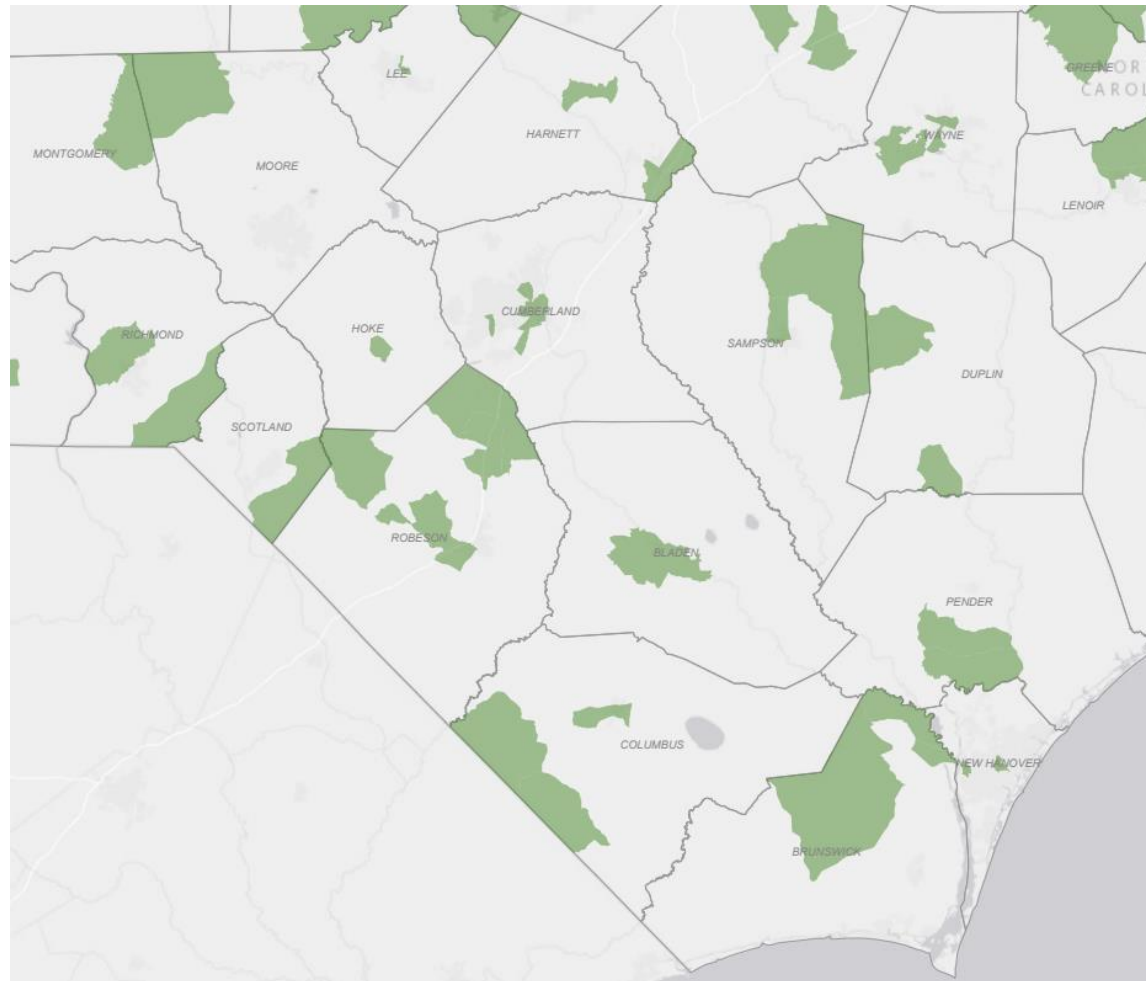


Figure 9 NC Oysters (Courtesy of UNCW)

Strengths, Weaknesses, Opportunities, and Threats Analysis

Citizens and stakeholders throughout the twelve-county SEDC region were engaged in-person and virtually to introduce the CEDS process and to perform a SWOT analysis. A SWOT analysis is a critical piece of a CEDS process. It is required by the EDA and is an opportunity for stakeholders to think about what makes their communities strong and unique while considering deficiencies and challenges. Three in-person meetings, lasting two hours each, occurred during the first week of August 2022 in Wilmington, Pembroke, and Fayetteville which are the headquarters for the Cape Fear, Lumber River, and Mid-Carolina Councils of Governments, respectively. Participants included regional leaders from the private and public sectors, educators, business representatives, and citizens who were interested in being involved in this important process. A two-hour virtual meeting was held during the second week of August to engage citizens who did not attend any of the three in-person meetings. In total, approximately 75 individuals participated in the in-person and virtual stakeholder meetings. In addition, an online questionnaire was made available to gather feedback from individuals who could not attend any meetings. Over 100 individuals representing all twelve SEDC district counties filled out the online questionnaire. Lastly, the CEDS Steering Committee provided important guidance and feedback throughout the entire process. The results of all the citizen and stakeholder feedback are displayed in the following table.

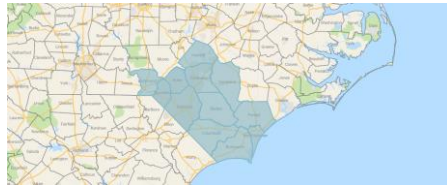
Strengths	Weaknesses	Opportunities	Threats
Transportation modes	Natural gas availability	Outdoor recreation economy	Inflation, stagflation
Diversified workforce and industries such as agriculture, life sciences, and military	Qualified workforce	Renewable and nuclear energy such as offshore wind energy	Supply chain
Quality of life	Housing	Alternative wastewater treatment	Global instability; reliance on foreign goods/services
Attractiveness of the region to retirees	Uneven economic and population growth	Leveraging industries (food and beverage, life sciences, manufacturing)	Climate change
International travel and trade access	Equity and inclusion	Military	Declining population in rural areas; losing political influence; competition with urban areas
Business-friendly	Infrastructure (utilities, transportation, broadband)	Blue economy	COVID strains on learning and youth development
Higher education	Natural disasters	Downtown revitalization	Workforce recruitment and retention
Healthcare	Increasing homelessness	Transportation expansions (interstates, rail, airports, and ports)	Natural disasters
"Right to work" state	Career opportunities for youth	Leveraging and managing federal resources	Beach integrity
Tourism	K-12 schools	Healthcare	
Entrepreneurship resources and culture	Public transportation	IT infrastructure	
Water quality/supply	Healthcare for an aging population	DOD funding	
Electric power availability	Industrial sites	Available land	
Culture of collaboration and cooperation	Childcare	Water/sewer regionalization	
	Lack of connection between industry and academia	Leveraging NC's economic development momentum	
		Small and diversified farming	

Regional and County Data Sheets

Data sheets were created for the 12-county SEDC and each county. Each sheet contains information about the economy, education, demographics, housing, and industries. Most of the data were collected from the US Census, American Community Survey, Bureau of Labor Statistics, NC Department of Revenue, and the NC Department of Commerce. Two main sources were used, StatsAmerica and JobsEQ, which both compile federal, state, and county data.

Regional Data Sheet

Includes: Bladen, Brunswick, Columbus,
Cumberland, Harnett, Hoke, New Hanover, Pender,
Richmond, Robeson, Sampson & Scotland Counties

Population ¹

2020 census	1,317,610
Male	644,115
Female	673,495
Median Age	38
Age 65+	221,542
Minority	644,907
Under 18	295,175
2030 Projection	1,469,472

Economic ²⁻⁵

	SEDC region	NC
Median Household Income	\$49,663	\$56,642
Per Capita Personal Income	\$27,347	\$31,993
Per Capita Living Wage	\$32,805	\$35,651
County Property Tax (\$ per \$100)	0.73	0.67
Unemployment Rate	3.3%	2.5%
Total Labor Force	574,889	5,112,231
Poverty Rate	18%	14%
Food Insecurity Rate	20%	14%

Higher Education

Bladen Community College
Campbell University
Methodist University
Richmond Community College
Sandhills Community College
Central Carolina Comm. College

Brunswick Community College
Fayetteville State University
Miller Motte College
Robeson Community College
Southeastern Community College
Fayetteville Technical Community College

Cape Fear Community College
UNC Pembroke
UNC Wilmington
Sampson Community College
St. Andrews University

Largest Private Sector Employers ⁶

Cape Fear Valley Health Systems
New Hanover Regional Health
Smithfield Foods Inc.
Mountaire Farms of NC
Perdue Farms Incorporated
Pharmaceutical Product Development LLC

Goodyear Tire & Rubber
Progress Energy
Lowes Home Centers
Wal-Mart Corp.
Food Lion

Housing ¹

Median Property Value	\$163,389
Homeowner Vacancy Rate	1.9%
Rental Vacancy Rate	6.8%
Occupied Housing Units	82%

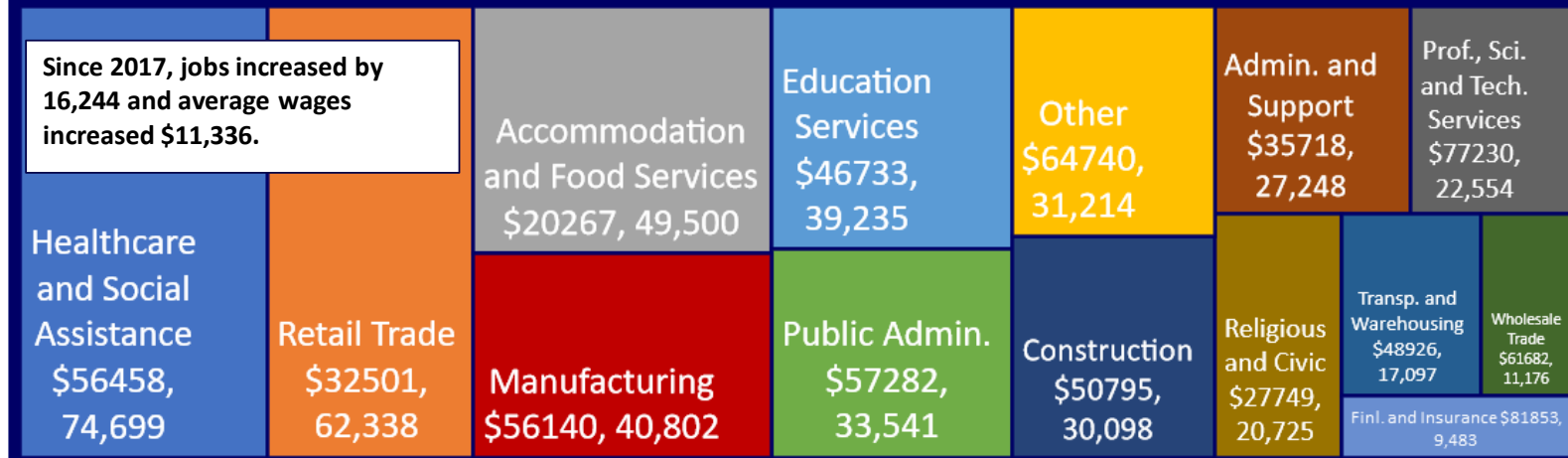
Educational Attainment ⁷

High School or More	89%
Bachelor Degree or More	26%
16-19 year-olds, dropped-out	6%

Sources

- 1 American Comm. Survey 2016-2020
3 NCDOR fiscal-year-2022-2023 taxes
5 Americashalthrankings.org 2022
6 NCCommerce Largest Employers 2022
7 Bureau of Labor Stats 2022
- 2 UNC SOG Food Insecurity 2022
4 Livingwage MIT.EDU 2017

Largest Industries, Average wages, # Employees



Bladen County Data Sheet

Bladen County

Population ¹

2020 census	33,209
Male	15,982
Female	17,227
Median Age	45
Age 65+	7298
Minority	16,498
Under 18	6849
2030 Projection	29,691

Economic ²⁻⁵

	Bladen	NC
Median Household Income	\$37,188	\$56,642
Per Capita Personal Income	\$24,752	\$31,993
Per Capita Living Wage	\$31,533	\$35,651
County Property Tax (\$ per \$100)	0.79	0.67
Unemployment Rate	4.7%	2.5%
Total Labor Force	8005	5,112,231
Poverty Rate	24%	14%
Food Insecurity Rate	23%	14%

Higher Education

Largest Private Sector Employers ⁶

Smithfield Foods Inc	Lineage Logistics Services LLC
Gildan Yarns LLC	Campbell Oil & Gas Co
C R England Inc	Wal-Mart Associates Inc.
First Source Staffing Services LLC	Maintenance Division LLC
Specialty Product Technologies	Dycos Services Inc
Packers Sanitation Services Inc	

Housing ¹

Median Property Value	\$98,700
Homeowner Vacancy Rate	0.7%
Rental Vacancy Rate	9.8%
Occupied Housing Units	74%

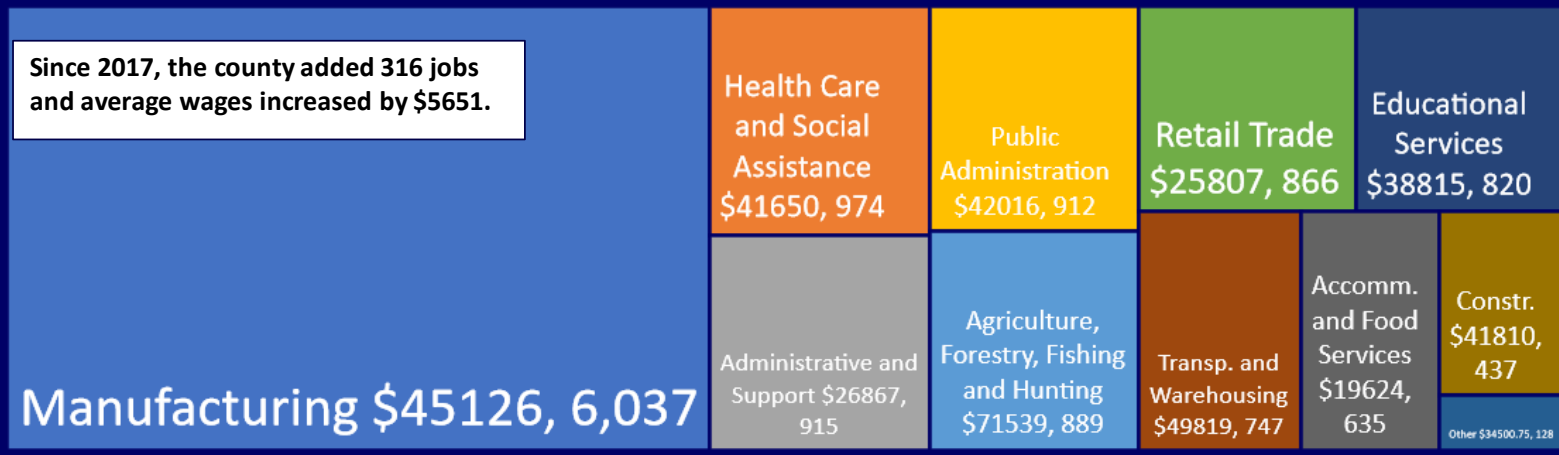
Educational Attainment ⁷

High School or More	84%
Bachelor Degree or More	17%
16-19 year-olds, dropped-out	11%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNCSOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Brunswick County Data Sheet

Brunswick County

Population ¹

2020 census	137,303
Male	65,902
Female	71,401
Median Age	55
Age 65+	43,237
Minority	28,834
Under 18	20,949
2030 Projection	198,610

Economic ²⁻⁵

	Brunswick	NC
Median Household Income	\$59,763	\$56,642
Per Capita Personal Income	\$34,528	\$31,993
Per Capita Living Wage	\$34,362	\$35,651
County Property Tax (\$ per \$100)	0.49	0.67
Unemployment Rate	4.8%	2.5%
Total Labor Force	33,125	5,112,231
Poverty Rate	11%	14%
Food Insecurity Rate	17%	14%

Higher Education

Largest Private Sector Employers ⁶

Wal-Mart Associates Inc.	Progress Energy Service Co
Brunswick Novant Medical Ctr.	Food Lion
Lowes Foods LLC	Liberty Healthcare Group LLC
Lowes Home Centers Inc	Charter Day School Inc
Novant Medical Group Inc	Victaulic Co
Mcandersons Inc	

Housing ¹

Median Property Value	\$220,400
Homeowner Vacancy Rate	2.2%
Rental Vacancy Rate	14.8%
Occupied Housing Units	65%

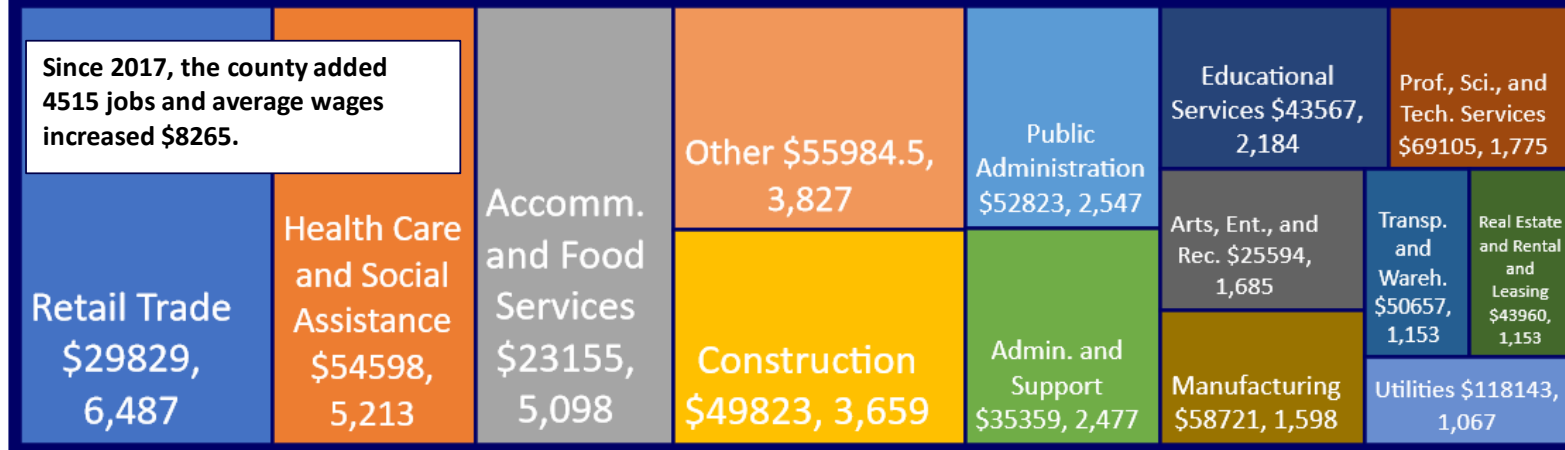
Educational Attainment ⁷

High School or More	91%
Bachelor Degree or More	26%
16-19 year-olds, dropped-out	4.6%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Columbus County Data Sheet

Columbus County

Population ¹

2020 census	55,659
Male	27,580
Female	28,079
Median Age	42
Age 65+	11,142
Minority	23,950
Under 18	11,681
2030 Projection	53,285

Economic ²⁻⁵

	Columbus	NC
Median Household Income	\$38,487	\$56,642
Per Capita Personal Income	\$22,426	\$31,993
Per Capita Living Wage	\$31,928	\$35,651
County Property Tax (\$ per \$100)	0.81	0.67
Unemployment Rate	7.7%	2.5%
Total Labor Force	13,905	5,112,231
Poverty Rate	22%	14%
Food Insecurity Rate	22%	14%

Higher Education



Southeastern
COMMUNITY COLLEGE

Largest Private Sector Employers ⁶

Employer Hr LLC	International Paper Company
Columbus Regional Healthcare System	BB& T
Atlantic Corporation Of Wilmington	Food Lion
Wal-Mart Associates Inc.	CDT Hr LLC
National Spinning Co Inc	Liberty Healthcare Group LLC

Housing ¹

Median Property Value	\$94,800
Homeowner Vacancy Rate	1.1%
Rental Vacancy Rate	7.1%
Occupied Housing Units	82%

Educational Attainment ⁷

High School or More	85%
Bachelor Degree or More	13%
16-19 year-olds, dropped-out	11%

Sources

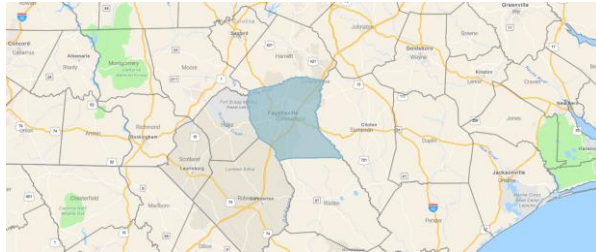
- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashhealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees

<p>Since 2017, the county has lost 16 jobs. Average wages have increased \$6343.</p>		<p>Manufacturing \$58625, 1,859</p>	<p>Public Admin. \$45264, 1,684</p>	<p>Accomm. and Food Svcs \$17359, 1,237</p>	<p>Construction \$40836, 721</p>	<p>Transp. and Warehousing \$53154, 613</p>
<p>Health Care and Social Assistance \$43727, 2,542</p>	<p>Retail Trade \$28460, 2,028</p>	<p>Admin. and Support Svcs \$27626, 1,778</p>	<p>Edn. Services \$45017, 1,364</p>	<p>Other \$43047, 1,233</p>	<p>Finance and Insurance \$49454, 610</p>	<p>Ag., Forestry, Fishing and Hunting \$53574, 459</p>
					<p>Prof., Sci., and Tech. Svcs \$56151, 520</p>	<p>Wholesale Trade \$34972, 374</p>

Cumberland County Data Sheet

Cumberland County

Population ¹

2020 census	334,562
Male	166,102
Female	168,460
Median Age	31
Age 65+	39,910
Minority	212,354
Under 18	82,782
2030 Projection	346,183

Economic ²⁻⁵

	Cumberland	NC
Median Household Income	\$48,177	\$56,642
Per Capita Personal Income	\$25,648	\$31,993
Per Capita Living Wage	\$34,819	\$35,651
County Property Tax (\$ per \$100)	0.80	0.67
Unemployment Rate	5.8%	2.5%
Total Labor Force	89,694	5,112,231
Poverty Rate	19%	14%
Food Insecurity Rate	19%	14%

Higher Education

Largest Private Sector Employers ⁶

Wal-Mart Associates Inc.	Food Lion
Goodyear Tire And Rubber Inc	Mcdonalds
Man Hummel Purolator Filters Llc	
Lowes Home Centers Inc	Sykes Enterprises Inc.
Pruithhealth Veteran Services NC	Methodist University
Horne Brothers Construction Inc	United Parcel Service Inc

Housing ¹

Median Property Value	\$139,700
Homeowner Vacancy Rate	3.2%
Rental Vacancy Rate	6.8%
Occupied Housing Units	87%

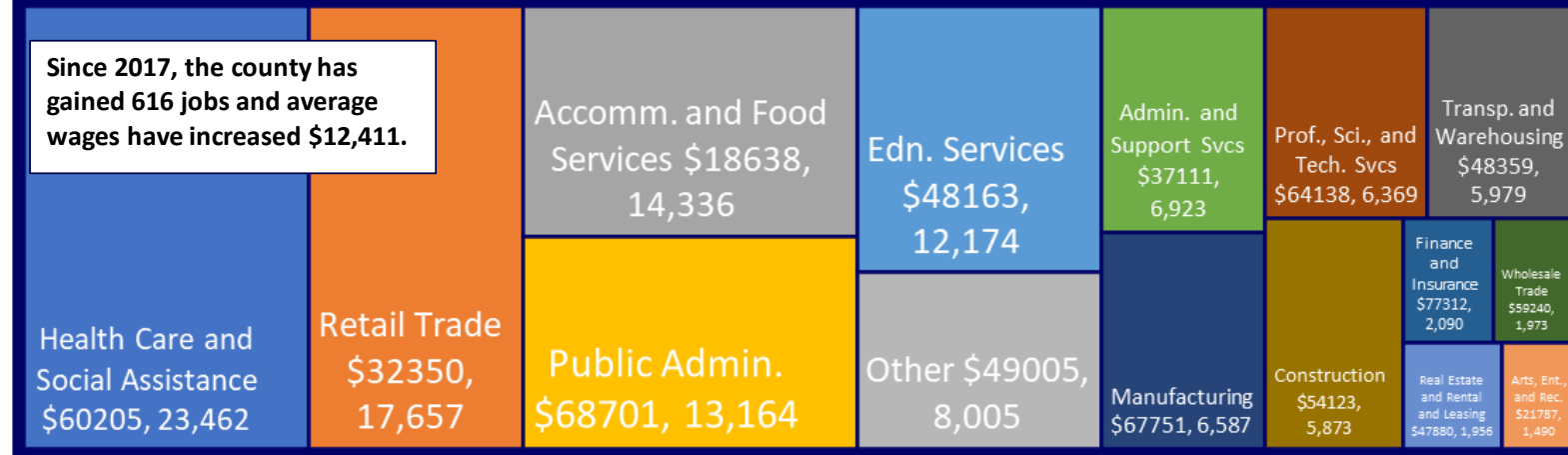
Educational Attainment ⁷

High School or More	93%
Bachelor Degree or More	27%
16-19 year-olds, dropped-out	4%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Harnett County Data Sheet

Harnett County

Population ¹

2020 census	134,328
Male	66,571
Female	67,757
Median Age	35
Age 65+	16,882
Minority	62,067
Under 18	35,003
2030 Projection	157,199

Economic ²⁻⁵

	Harnett	NC
Median Household Income	\$54,565	\$56,642
Per Capita Personal Income	\$24,693	\$31,993
Per Capita Living Wage	\$32,718	\$35,651
County Property Tax (\$ per \$100)	0.59	0.67
Unemployment Rate	4.4%	2.5%
Total Labor Force	39,415	5,112,231
Poverty Rate	16%	14%
Food Insecurity Rate	18%	14%

Higher Education

Largest Private Sector Employers ⁶

Champion Home Builders Inc	Food Lion
Campbell University	Wal-Mart Associates Inc.
Rooms To Go Inc.	Carlie C's Operation Center Inc.
RHA Health Services LLC	Lowes Home Centers
Adapthealth LLC	Capstone Logistics LLC

Housing ¹

Median Property Value	\$160,700
Homeowner Vacancy Rate	2.2%
Rental Vacancy Rate	7.9%
Occupied Housing Units	89%

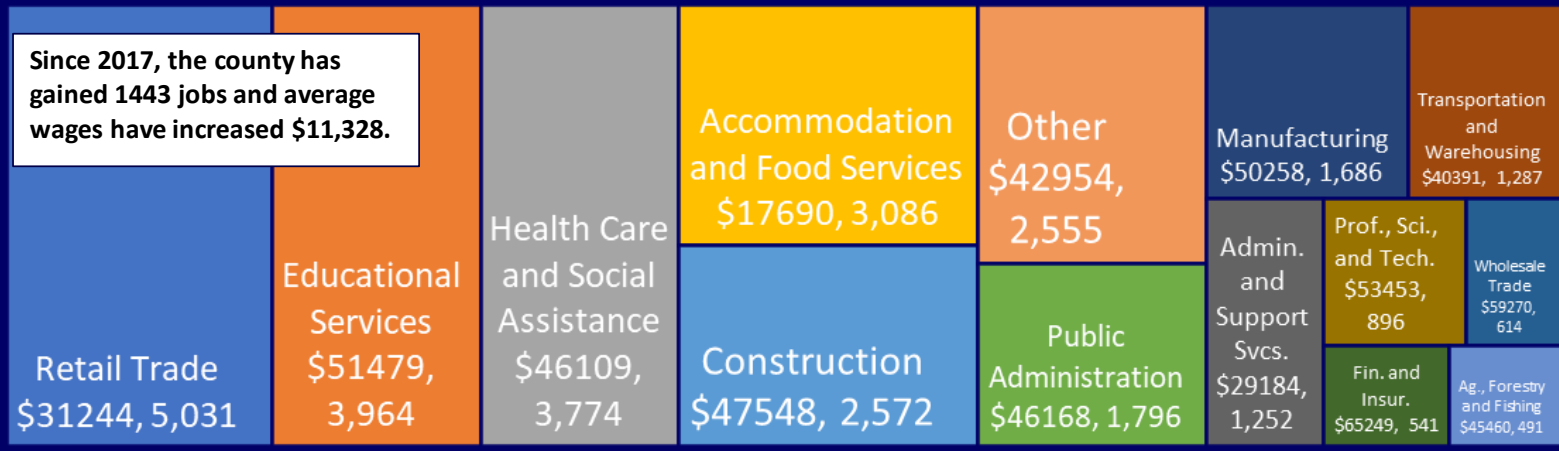
Educational Attainment ⁷

High School or More	90%
Bachelor Degree or More	24%
16-19 year-olds, dropped-out	3%

Sources

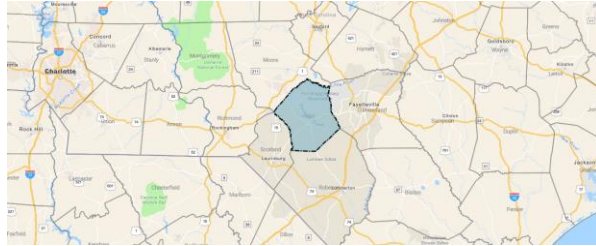
- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Hoke County Data Sheet

Hoke County

Population ¹

2020 census	54,590
Male	26,979
Female	27,611
Median Age	33
Age 65+	5470
Minority	38,122
Under 18	14,923
2030 Projection	63,334

Economic ²⁻⁵

	Hoke	NC
Median Household Income	\$51,140	\$56,642
Per Capita Personal Income	\$23,066	\$31,993
Per Capita Living Wage	\$33,072	\$35,651
County Property Tax (\$ per \$100)	0.73	0.67
Unemployment Rate	5.5%	2.5%
Total Labor Force	15,193	5,112,231
Poverty Rate	19%	14%
Food Insecurity Rate	19%	14%

Higher Education

Largest Private Sector Employers ⁶

Butterball LLC	Burlington Industries
Wal-Mart Associates Inc.	Lazer Spot Inc
Firsthealth Of The Carolinas Inc	Food Lion
Fedex Ground Package System Inc	Conopco Inc
The Staffing Alliance LLC	
House Of Raeford Autumn Corporation	

Housing ¹

Median Property Value	\$146,200
Homeowner Vacancy Rate	3.1%
Rental Vacancy Rate	6.1%
Occupied Housing Units	87%

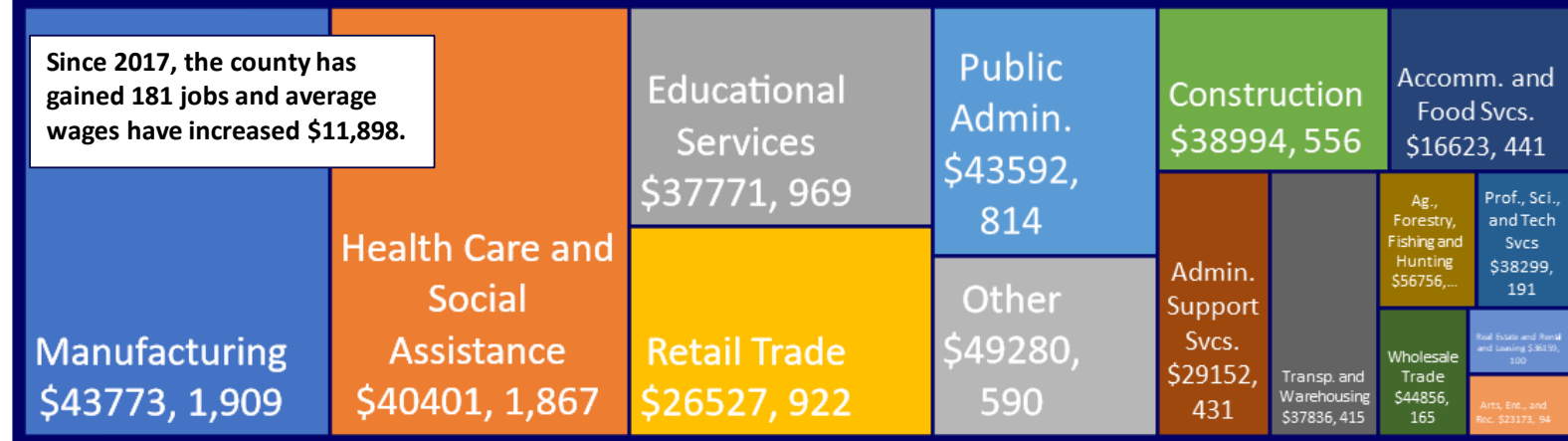
Educational Attainment ⁷

High School or More	88%
Bachelor Degree or More	19%
16-19 year-olds, dropped-out	2.0%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNCSOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashalthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



New Hanover County Data Sheet

New Hanover County

Population ¹

2020 census	231,448
Male	110,218
Female	121,230
Median Age	39
Age 65+	41,068
Minority	57,964
Under 18	42,710
2030 Projection	277,255

Economic ²⁻⁵

	New Hanover	NC
Median Household Income	\$56,689	\$56,642
Per Capita Personal Income	\$36,324	\$31,993
Per Capita Living Wage	\$35,256	\$35,651
County Property Tax (\$ per \$100)	0.46	0.67
Unemployment Rate	3.4%	2.5%
Total Labor Force	72,622	5,112,231
Poverty Rate	15%	14%
Food Insecurity Rate	16%	14%

Higher Education

CAPE FEAR
COMMUNITY
COLLEGELargest Private Sector Employers ⁶

Novant Health New Hanover Regional
 Ppd Development Llc Mastec Services Company Inc
 Wal-Mart Associates Inc. Corning Incorporated
 Harris Teeter Ncino, Inc. WHA Medical Clinic PLLC
 Carolina Healthcare Associates Inc Live Oak Bank
 GE Hitachi Nuclear Americas LLC

Housing ¹

Median Property Value	\$258,200
Homeowner Vacancy Rate	1.5%
Rental Vacancy Rate	5.9%
Occupied Housing Units	87%

Educational Attainment ⁷

High School or More	94%
Bachelor Degree or More	44%
16-19 year-olds, dropped-out	3.9%

Sources

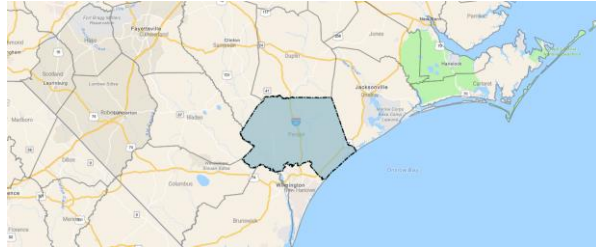
- 1 American Comm. Survey 2016-2020
 2 UNCSOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees

Since 2017, the county has gained 9254 jobs and average wages have increased \$18,276.		Professional, Scientific, and Technical Services \$96436, 10,552		Edn. Services \$48236, 8,248	Other \$59146, 7,203	Public Admin \$59851, 5,165	Transp. and Warehousing \$50833, 4,394
Health Care and Social Assistance \$66639, 20,979	Retail Trade \$37754, 16,089	Accomm. and Food Services \$23173, 16,079	Construction \$56783, 9,973	Admin. and Support Svcs \$40728, 7,585	Mfg. \$75595, 5,293	Wholesale Trade \$71220, 4,032	Real Estate, Rental, Leasing \$53490, 3,174
						Finance and Insurance \$107759, 3,657	Info. \$135430, 2,851
							Arts, Ent., and Rec \$26440, 2,149

Pender County Data Sheet

Pender County

Population ¹

2020 census	61,891
Male	31,006
Female	30,885
Median Age	43
Age 65+	11,003
Minority	18,517
Under 18	13,763
2030 Projection	79,720

Economic ²⁻⁵

	Pender	NC
Median Household Income	\$60,044	\$56,642
Per Capita Personal Income	\$30,666	\$31,993
Per Capita Living Wage	\$32,947	\$35,651
County Property Tax (\$ per \$100)	0.65	0.67
Unemployment Rate	3.6%	2.5%
Total Labor Force	18,217	5,112,231
Poverty Rate	14%	14%
Food Insecurity Rate	18%	14%

Higher Education

Largest Private Sector Employers ⁶

Medical Edge Recruitment LLC	Wal-Mart Associates Inc
RC Creations LLC	Lowes Home Centers Inc
Pender EMS And Fire Inc	Food Lion
Publix	Harris Teeter
Woodbury Wellness Center Inc	North Carolina Employee Services
The Laurels Of Pender LLC	Johnson Nursery
	Filmwerks Llc

Housing ¹

Median Property Value	\$191,008
Homeowner Vacancy Rate	1.2%
Rental Vacancy Rate	7.1%
Occupied Housing Units	77%

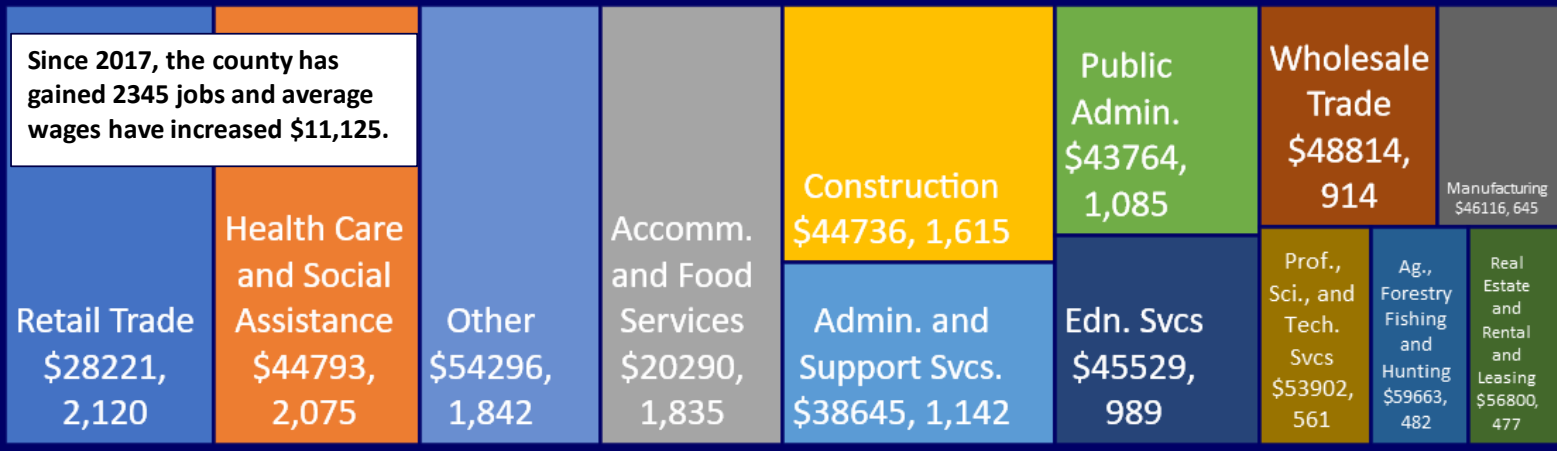
Educational Attainment ⁷

High School or More	90%
Bachelor Degree or More	30%
16-19 year-olds, dropped-out	6.4%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Richmond County Data Sheet

Richmond County

Population ¹

2020 census	44,759
Male	21,891
Female	22,868
Median Age	41
Age 65+	7932
Minority	20,667
Under 18	10,160
2030 Projection	43,935

Economic ²⁻⁵

	Richmond	NC
Median Household Income	\$39,051	\$56,642
Per Capita Personal Income	\$22,068	\$31,993
Per Capita Living Wage	\$32,698	\$35,651
County Property Tax (\$ per \$100)	0.83	0.67
Unemployment Rate	6.0%	2.5%
Total Labor Force	12,757	5,112,231
Poverty Rate	22%	14%
Food Insecurity Rate	23%	14%

Higher Education

Largest Private Sector Employers ⁶

Perdue Farms Inc.	Firsthealth Of The Carolinas Inc
Wal-Mart Associates Inc.	Plastek Industries Inc
Cascades Moulded Pulp	Burlington Industries
Hood Packaging Corporation	Lowes Home Centers Inc
Food Lion	J B Hamlet LLC
Big Rock Sports	Qsi LLC

Housing ¹

Median Property Value	\$88,200
Homeowner Vacancy Rate	0.5%
Rental Vacancy Rate	4.6%
Occupied Housing Units	84%

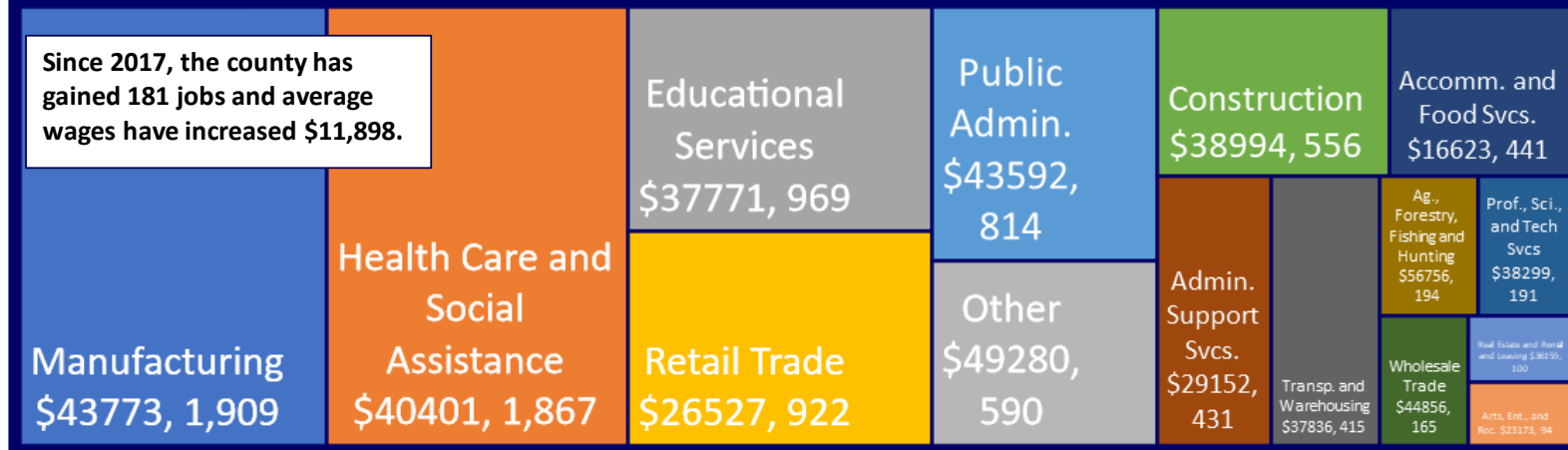
Educational Attainment ⁷

High School or More	86%
Bachelor Degree or More	18%
16-19 year-olds, dropped-out	6.0%

Sources

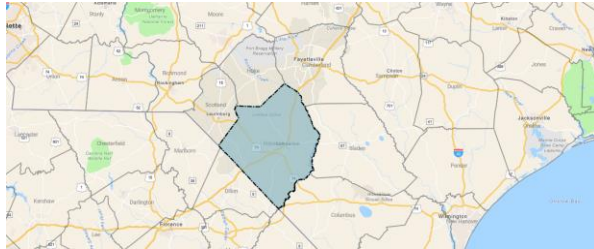
- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Robeson County Data Sheet

Robeson County

Population ¹

2020 census	131,656
Male	63,484
Female	68,172
Median Age	37
Age 65+	20,028
Minority	107,446
Under 18	32,927
2030 Projection	122,955

Economic ²⁻⁵

	Robeson	NC
Median Household Income	\$35,362	\$56,642
Per Capita Personal Income	\$19,388	\$31,993
Per Capita Living Wage	\$31,262	\$35,651
County Property Tax (\$ per \$100)	0.77	0.67
Unemployment Rate	6.5%	2.5%
Total Labor Force	34,490	5,112,231
Poverty Rate	27%	14%
Food Insecurity Rate	23%	14%

Higher Education

Largest Private Sector Employers ⁶

Mountaire Farms Of NC Inc	BB&T	McDonalds
Southeastern Regional Medical Ctr	Prestage Foods	
Wal-Mart Associates Inc.	Primary Health Choice Inc	
Campbell Soup Supply Company LLC	Food Lion	
Two Hawk Employment Services LLC	Cynthia Quarles	
Pepsi Bottling Ventures		

Housing ¹

Median Property Value	\$75,600
Homeowner Vacancy Rate	0.8%
Rental Vacancy Rate	4.1%
Occupied Housing Units	86%

Educational Attainment ⁷

High School or More	80%
Bachelor Degree or More	14%
16-19 year-olds, dropped-out	5.0%

Sources

- 1 American Comm. Survey 2016-2020 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes 4 Livingwage MIT.EDU 2017
 5 Americashalthrankings.org 2022
 6 NCCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Sampson County Data Sheet

Sampson County

Population ¹

2020 census	63,284
Male	31,128
Female	32,156
Median Age	40
Age 65+	11,340
Minority	37,510
Under 18	15,490
2030 Projection	63,961

Economic ²⁻⁵

	Sampson	NC
Median Household Income	\$42,914	\$56,642
Per Capita Personal Income	\$23,502	\$31,993
Per Capita Living Wage	\$31,533	\$35,651
County Property Tax (\$ per \$100)	0.83	0.67
Unemployment Rate	4.0%	2.5%
Total Labor Force	17,511	5,112,231
Poverty Rate	22%	14%
Food Insecurity Rate	18%	14%

Higher Education

Largest Private Sector Employers ⁶

Smithfield Foods Inc	Prestage Farms Inc
Hog Slat Inc	Wal-Mart Associates Inc
Mcdonald's	Mears Construction Of Ga LLC
Sampson Bladen Oil Co., Inc	Food Lion
Liberty Healthcare Group LLC	Dubose Strapping Inc
Carlie C's Operation Center Inc	Natures Way Farms Inc

Housing ¹

Median Property Value	\$97,500
Homeowner Vacancy Rate	0.6%
Rental Vacancy Rate	5.7%
Occupied Housing Units	83%

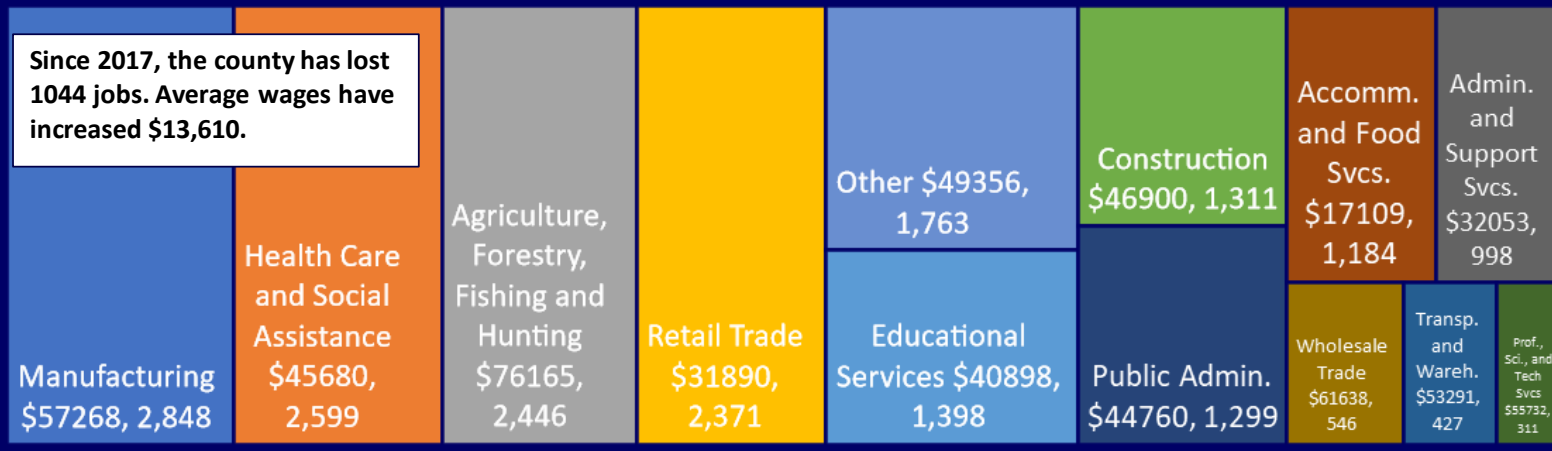
Educational Attainment ⁷

High School or More	82%
Bachelor Degree or More	15%
16-19 year-olds, dropped-out	9.1%

Sources

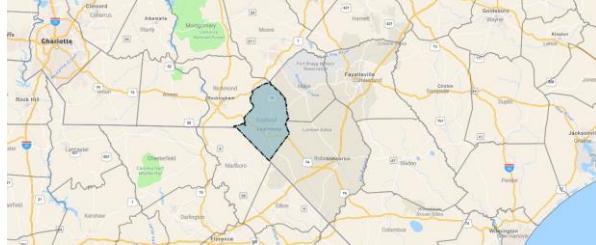
- 1 American Comm. Survey 2016-2020
 2 UNCSOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Scotland County Data Sheet

Scotland County

Population ¹

2020 census	34,921
Male	17,272
Female	17,649
Median Age	39
Age 65+	6232
Minority	20,978
Under 18	7938
2030 Projection	33,334

Economic ²⁻⁵

	Scotland	NC
Median Household Income	\$35,936	\$56,642
Per Capita Personal Income	\$20,975	\$31,993
Per Capita Living Wage	\$31,533	\$35,651
County Property Tax (\$ per \$100)	0.99	0.67
Unemployment Rate	4.7%	2.5%
Total Labor Force	8,765	5,112,231
Poverty Rate	27%	14%
Food Insecurity Rate	28%	14%

Higher Education

Largest Private Sector Employers ⁶

Scotland Memorial Hospital	Wal-Mart Associates Inc
Pilkington North America Inc	Hanesbrands, Inc
Meritor Heavy Vehicle Systems LLC	St Andrews University
Fcc (North Carolina) LLC	Edwards Wood Products Inc
Railroad Friction Products Corp	Nics Pic Kwik Inc
The Presbyterian Homes Inc	

Housing ¹

Median Property Value	\$87,600
Homeowner Vacancy Rate	1.0%
Rental Vacancy Rate	1.6%
Occupied Housing Units	84%

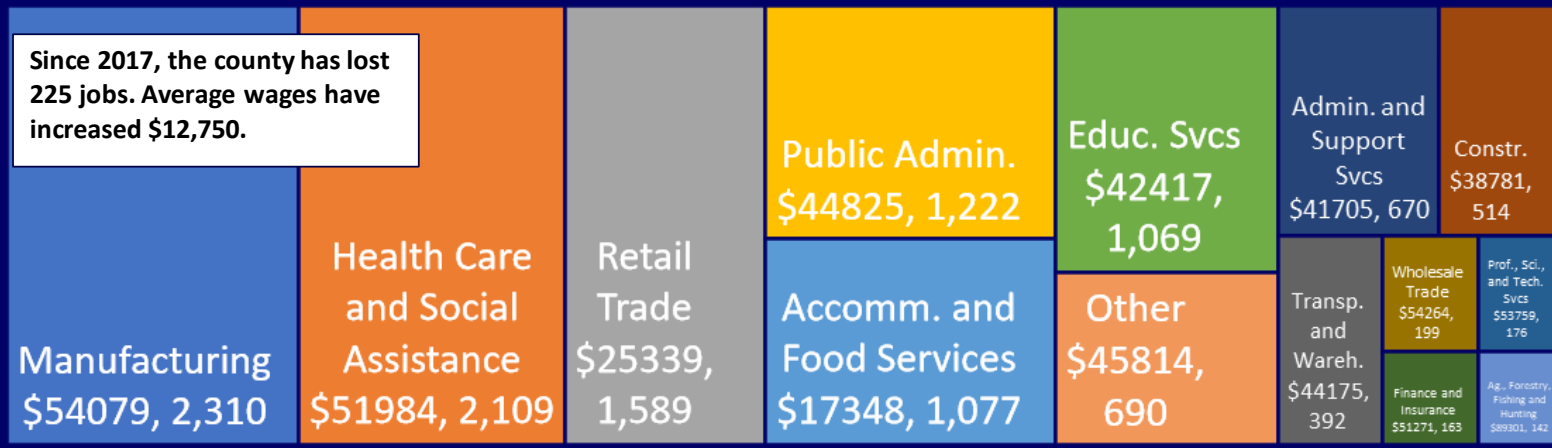
Educational Attainment ⁷

High School or More	84%
Bachelor Degree or More	16%
16-19 year-olds, dropped-out	4.6%

Sources

- 1 American Comm. Survey 2016-2020
 2 UNC SOG Food Insecurity 2022
 3 NCDOR fiscal-year-2022-2023 taxes
 4 Livingwage MIT.EDU 2017
 5 Americashealthrankings.org 2022
 6 NCommerce Largest Employers 2022
 7 Bureau of Labor Stats 2022

Largest Industries, Average wages, # Employees



Economic Resilience

According to the US Economic Development Administration (EDA), Economic Resilience is the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid a shock altogether. In this section, we have prepared a framework for Economic Resilience that provides an approach for becoming better prepared for future disasters, including economic, manmade, and natural, recovering from disasters, and then transitioning back to a steady state.

Purpose

The purpose of this section is to define Economic Resilience and provide a guide to increase economic resilience in the region.

Prepare

Various economic shock factors have varying levels of severity and devastation, such as pandemics, natural disasters, major stock market fluctuations, economic downturns and recessions, government shutdowns, availability of funding, terrorist attacks, and substantial fluctuations in supplies. Each of these types of shocks should be considered when the following actions are considered.

Strategies to Develop a More Resilient Economy

The following pre- and post-shock actions will help to develop a more resilient economy:

- Prepare plans that allow the community to absorb, respond, adapt, and recover to pre-shock conditions.
- Develop a long-term strategy to diversify and expand the regional industrial base.
- Develop personal relationships and reliable communication avenues with top employers in the region (See Appendix 1 for lists of the ten largest employers in each county).
- Develop personal relationships and a communication strategy for small businesses in the region.
- Focus efforts on strengthening existing businesses, especially high-growth businesses.
- Increase availability of “baseline” business information. Develop inventory with contact information for businesses within the jurisdiction.
- Increase communications between local government, emergency management, utilities, and the business community.
- Partner with community colleges and the university system to establish nimble workforce development programs that can prepare residents for the future economy, but also quickly react to shocks and help to retrain residents for the new normal.

- Develop a procurement strategy and team that is authorized to procure goods and services from local providers in the event of an emergency. There should be a database of local suppliers and services. The procurement team should have a working knowledge and understanding of FEMA procurement and reimbursement rules.
- Develop responsive initiatives that define key stakeholders, roles, responsibilities, and actions. In addition, establish a system for regular communication, monitoring, and updating of business community needs and issues.
- Steady-state initiatives diversify the economic base of the region, making the entire region more adaptable and better able to withstand or avoid a shock.

Recovery

While recovery plans will be uniquely correlated to the type of shock that occurs, as an example, the information in this section centers on the recovery response to the COVID-19 pandemic. The full report is included in Appendix 4. In the wake of COVID-19, the SEDC commissioned a pandemic response study to assess the impacts of COVID-19 in the region and develop practical strategies for recovery and resilience.

Goal (1) Build on the region's competitive advantages and leverage the marketplace

Actions	Partner
Continue to work with regional councils of government (COGs) and partners to identify grant-eligible economic development projects to help ensure that the region takes full advantage of available funding opportunities.	COGs
Support the region's economic development professionals to determine additional database or data management needs, focused on determining what SEDC can provide to benefit economic development analyses across the region.	County and regional economic developers
Convene at least one workshop for regional stakeholders with a focus on business response/recovery/resiliency needs and resources	COGs, workforce development professionals
Collaborate with other economic development organizations that are focused on COVID-19 response, recovery, or resiliency throughout the region to enhance regional programs, goals, or metrics.	County and regional economic developers

Goal (2) Establish and maintain a robust regional infrastructure, including affordable, adequate housing

Actions	Partner
Support regional efforts for improved rural public transit systems to provide everyone in the region with essential, affordable, and reliable transportation options.	COGs
Support the appropriate planning organizations to promote and guide and attract multi-modal federal and	COGs

state transportation investments throughout the region.	
Convene at least one workshop for regional infrastructure stakeholders on water and/or wastewater system financing that considers the unique impacts and financing challenges brought on by the COVID-19 pandemic.	COGs
Collaborate with stakeholders to identify funding sources that address local government water, wastewater, and stormwater infrastructure needs with a focus on projects that promote economic expansion and improve community resiliency and system viability.	COGs
Continue supporting broadband connectivity throughout the region.	COGs
Support stakeholders in creating and adopting Capital Improvement Plans and Asset Management Plans to guide ongoing infrastructure investments.	COGs
Collaborate with stakeholders to identify funding for affordable housing development or existing housing rehabilitation.	COGs

Goal (3) Create Revitalized and Vibrant Communities

Actions	Partner
Determine ways to partner with the NC Department of Commerce's Main Street & Rural Planning Division to facilitate implementation of the Community Economic Recovery and Resiliency Initiative (CERRI) in the SEDC region, which is developed with a deliberate focus on COVID-19 response, recovery, and resiliency.	COGs
Support the recovery resiliency of the region's community support services sector including their systems and programs in place which help to address the disproportionate impact of COVID-19 on historically marginalized populations. Some targets include senior services, childcare, food supplement, health, housing, and utility support sectors.	COGs, nonprofit organizations
Where and when appropriate, support the SEDC district in implementing COVID-19-related operational changes including remote public meeting formats, social distancing in public spaces, and use of personal protective equipment, to help foster safety.	All partner organizations
Collaborate with the state and region's local food system stakeholders to strengthen and grow access to local, healthy foods, especially for those most vulnerable and underserved residents.	COGs, nonprofit organizations
Promote new fiscal models supporting sustainable and environmentally-friendly agricultural practices to enhance the resiliency of the region's critical agricultural sector.	COGs, nonprofit organizations
Identify and foster private and non-profit partnership opportunities to support the region's COVID-19 preparation, response, recovery, and resiliency efforts, acknowledging the need for additional leadership capacity within the region's non-profit network to help build and sustain a healthy and productive region.	COGs, NC Rural Center

Goal (4) Develop a healthy, skilled, and vibrant workforce

Actions	Partner
Collaborate with the region's community colleges to determine SEDC's and stakeholders' roles in expanding or enhancing entrepreneurial programming and ecosystem-building efforts.	Regional community colleges
Support emerging health entrepreneurship and innovative public health measures in the region.	COGs, healthcare organizations
Encourage resource-providing organizations across the region to contribute to and participate in NCCARE360, an electronic statewide care network administered by the NC Department of Health and Human Services, to streamline COVID-related assistance.	COGs, healthcare organizations
Coordinate with stakeholders to adjust or enhance workforce training and hiring programs for pandemic resilience, like virtual hiring and job fairs and a virtual platform to connect job seekers and employers.	COGs, workforce development professionals
Support area agencies on aging to determine the need for adjustment of programs that seek to improve the prosperity and financial wellbeing of the region's senior citizen workforce.	COGs
Support increasing educational and development opportunities in healthcare professions, especially increasing the pipeline of healthcare workers to rural and underserved areas.	COGs, healthcare organizations
Convene at least one workshop for regional stakeholders, in partnership with regional workforce development organizations, with a focus on responding to or preparing for workforce development impacts resulting from the COVID-19 pandemic.	COGs
Collaborate with stakeholders to address the economic impacts of childcare and eldercare challenges.	COGs
Work to better understand the importance, support needs, and development opportunities of essential workers	COGs, workforce development professionals

Goal (5) Encourage entrepreneurs and small business growth, support existing businesses, and attract new employers in the region.

Actions	Partner
Work with small business support organizations, incubators, accelerators, and investment groups to survey and understand the scope and diversity of small businesses across the region	Regional universities and community colleges
Support the district's industrial and business site development efforts to assist in attracting and retaining quality employers, recognizing that the COVID-19 pandemic has presented significant impacts on the commercial real estate industry and site selection process.	County and regional economic developers
Collaborate with stakeholders to address the region's economic development infrastructure needs to help regional stakeholders prioritize most strategic investments at existing or additional business and industrial sites.	County and regional economic developers

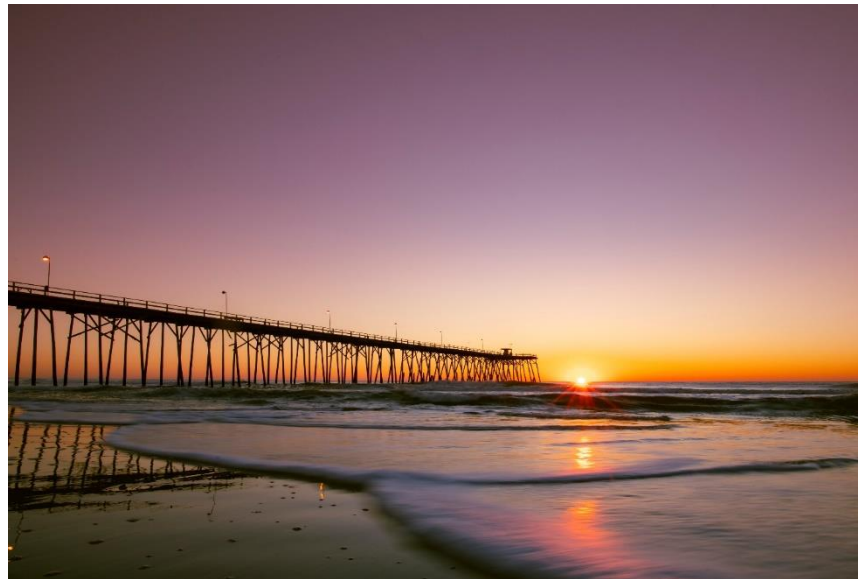
General Recommendations

Continue to research and share educational, technical, and funding resources with stakeholders through newsletters, social media content, special meetings, workshops, and Board of Director updates.

Participate with federal, state, and local organizations and networks to help coordinate resource development and dissemination for stakeholders. For example, the COG could actively participate in the NC Inclusive Disaster Recovery Network which continues to share information about funding opportunities and other resources through its contact list of nearly 1,000 individuals and organizations.

Partner and coordinate with member local governments and organizations across the SEDC district to implement the CEDS and this COVID-19 Addendum, while continuing to convene the CEDS Strategy Committee to invite input on regional priorities and monitor the effectiveness of the CEDS and this COVID-19 Addendum.

Figure 10 Atlantic Ocean Pier (Courtesy UNCW)



Strategic Direction

Action Plan

The Comprehensive Economic Development Strategy (CEDS) document was created by the Southeastern Economic Development Commission as part of a region-wide effort to assess, define, and accomplish the economic development goals of the region. In turn, the CEDS helps to serve as a guide for regional economic development efforts by outlining the overarching goals, objectives, and strategies that were formulated through the regional visioning meetings, SWOT analyses, previous CEDS plans, one-on-one discussions with stakeholders, and review of other local and regional strategic plans. The Action Plan aligns with the NC Tomorrow statewide plan² that identifies regional and statewide strategies for resilient economic and community development. NC Tomorrow metrics are marked with an asterisk (*).

The plan of action will implement the goals, objectives, and strategies of the CEDS in a manner that:

- promotes economic development and opportunity
- fosters effective transportation access
- enhances and protects the environment
- maximizes effective development and use of the workforce consistent with any applicable state or local workforce investment strategies
- promotes the use of technology in economic development, including access to high-speed telecommunications; balances resources through sound management of physical development
- obtains and utilizes adequate funds and other resources

On the following pages, the goals, strategies, and objectives are listed—including performance measures to be used to ensure progress is made consistently.

Goal 1: Support strategic and sustainable growth across the region to attract population to rural communities and manage population growth in urban areas.

The SWOT analysis indicated threats related to the declining population in the SEDC district's rural areas such as losing political influence and loss of youth and workers. There are many factors contributing to population loss in rural areas, but stakeholder engagement meetings attributed the lack of housing infrastructure as one of the primary causes. Indeed, housing availability continued to lead all other issues as a significant problem in many SEDC region communities. A 2018 Wall Street Journal article¹⁸ mentioned that rural communities struggle to attract housing developers because they lack

the economies of scale that are available in urban areas, making materials and labor more expensive. In addition, the article stated that “rural areas are also seeing their populations stagnate or decline as younger people opt for urban living, adding to the gamble involved in speculative building”.¹⁸ Population loss and lack of adequate housing has been apparent for years but these dual issues accelerated after the 2019 COVID pandemic, making these issues even more urgent.

On the SEDC region’s eastern coast, the Wilmington area has been steadily growing. From 2015-2020, the population grew by 8.7% placing it within striking distance of the country’s fastest-growing small metro areas.¹⁹ If Brunswick was officially counted in the Wilmington MSA instead of Myrtle Beach, SC, the adjusted Wilmington MSA would be much higher up on the list of fastest-growing small metro areas.²⁰ During stakeholder meetings, officials representing New Hanover, Pender, and Brunswick counties talked about the need to manage population growth because those counties were attracting too many people, too quickly, especially since the outbreak of the COVID pandemic. Officials also mentioned the need for housing infrastructure to keep pace with population growth.

Citizens across the twelve-county region spend a considerable amount of their income on housing. When citizens are unable to afford housing, they will seek areas where they can earn higher wages and manage their housing costs. HUD defines cost-burdened families as those “who pay more than 30 percent of their income for housing” and “may have difficulty affording necessities such as food, clothing, transportation, and medical care.”^{21, 22} In the SEDC region, 40% or more of households who rent are cost-burdened. Thirty percent of owner households with mortgages are cost-burdened. Owner households without mortgages range from 9% (Sampson County) to over 22% (Columbus County) who are cost-burdened. The breakdown by county can be found in Appendix 5.

The North Carolina Housing Coalition advocates for housing across the state. Its mission is to “ensure that every North Carolinian has a home in which to live with dignity and opportunity”²³. The Coalition meets its mission by convening, resourcing, and mobilizing affordable housing professionals, communities impacted by a lack of affordability, and the broader public to pursue policies at the local, state, and federal levels that improve the supply, quality, and access of affordable housing in North Carolina. It produces annual county housing snapshots detailing how cost-burdened residents are. Information for Bladen, Columbus, Richmond, Robeson, Sampson, and Scotland counties are included in Appendix 6. Data are similar but more recent than the data found in Appendix 5.

With limited ability to attract outside investment in housing infrastructure, the region must focus on helping counties grow their populations where needed and manage growth in areas that are growing too quickly.

Objective 1: Increase equitable and affordable housing choices across the region.

1.1 Conduct an inventory of housing-related programs and organizations within the region.

1.2 Conduct an inventory of available, affordable, and quality housing choices based on the demographic profile and household income of each county within the region.

1.3 Identify funding sources for housing infrastructure that can support housing development in distressed areas

Performance Measures

Milestones

- Complete an inventory of available and affordable housing.
- Complete an inventory of housing-related programs and organizations.

Metrics

- Number and amounts of infrastructure investments.

Figure 11 Downtown Raeford (Courtesy of Grace Lawrence)



Goal 2: Build on competitive advantages while supporting a resilient business environment

The development process for the CEDS plan included regional visioning and SWOT analysis meetings that helped identify the region's competitive economic clusters. According to the SWOT analysis, the region's strengths include a diversified workforce and industries, abundant power and water, and a business-friendly environment. Additionally, the analysis indicated renewable energy, manufacturing, the military, and the blue economy as opportunities.

Other regional plans were reviewed to help identify the economic clusters for the Region, such as the 2021-2024 Strategic Plan,¹⁴ Competitive Positioning 2020,²⁴ and the three-year Strategic Marketing Plan (2017-2020) prepared by The Southeastern Partnership (aka NC's Southeast and The Southern Partnership). The Partnership provides strong economic development leadership in southeastern North Carolina through innovative marketing and collaborative regional initiatives that support the creation of new jobs, generate capital investment, and secure new business locations. The SEDC is an active member of The Southeastern Partnership which provides opportunities to develop relationships with public and private allies and partners that work together at the local, regional, and state levels. The SEDC believes that a fully collaborative effort yields the best results.

This plan supports the continued evolution of existing and emerging industry clusters within the region. Industry clusters that have been the focus of growth and development in the region are listed below.

1. Advanced Manufacturing
2. Food Processing and value-added Agribusiness
3. Biotechnology & Life Sciences
4. Healthcare
5. Defense (ADD Aerospace)
6. Tourism
7. Distribution and Logistics
8. Energy

The advanced manufacturing cluster encompasses all high-tech manufacturing businesses, including those such as Building Products, Advanced Textiles, Aviation and Aerospace, and Metalworking. The region was once known for its highly-skilled metalworkers. The loss of manufacturing jobs in the region has reduced its workforce numbers. With the changes brought about by globalization and the potential for manufacturing reshoring, rebuilding this sector is vital to create jobs in the region.⁶

Agriculture—both in farming and food processing—remains a dominant industry not only in terms of acres under production but also in employment and value of the product to the regional economy. The counties of Sampson (#2), Bladen (#4), and Robeson (#8) all ranked within the top ten counties statewide in farm cash receipts in 2020.²⁵ Assistance with diversification strategies are needed to ensure future employment and income in the region.

The region is home to the largest food processing facility for swine in the world. Smithfield Foods, located in Bladen County, is one of the region's largest employers with over 5,000 employees. Four other food processing facilities located in the region have over 1,000 employees: Butterball (Hoke), Perdue Farms (Richmond), Mountaire Farms (Robeson), and a second Smithfield Foods in Sampson County.

The biotechnology/life sciences sector is well-represented in the region, and the associated research and biomanufacturing aid in developing medicines (clinical research), growing food (agricultural biotech) and generating energy from waste products such as food processing and animal waste (industrial biotech). Investments in biotechnology enterprises and research are growing in the region, with the sector accounting for more than 5,000 jobs across the region. The total economic impact of the sector in North Carolina is \$84 billion, with \$2.3 billion in state and local revenues across the state from more than 790 bioscience companies and 2500 support companies employing over 224,000 North Carolinians. The southeastern region accounts for a significant component of this statewide impact with one of the largest clusters of contract research organizations (CRO) in the state and nation, as well as a burgeoning contract development and biomanufacturing cluster led by Alcami and Quality Chemical Labs which are both growing here. With recent investments in pharma-focused cold supply chain logistics and storage capacity, the region is also poised to become a substantial hub for shipping a broad range of life sciences-related products through the region's port and airports.²⁶

Additionally, the University of North Carolina at Wilmington's CREST Research Park is home to the 69,000-square-foot interdisciplinary MARBIONC research facility that advances new marine biotechnology discoveries and ensures the timely transfer of technology from the laboratory to the marketplace. Agricultural biotech and industrial biotech are often interrelated, and these subsectors are growing due to the region's strong agricultural base and network of universities and community colleges engaged in biotech research and business assistance through bio-accelerators. The North Carolina Biotechnology Center Southeastern Office, located in Wilmington, serves the entire region to lead development in this sector.²⁶

The healthcare sector comprises some of the largest employers in the region. The healthcare and social assistance sector generated over \$3.8 billion in total wages during 2021 - more than any other sector of employment.²⁷

Manufacturing (\$2.2 billion) and public administration (\$1.9 billion) placed second and third, respectively.²⁷ Job growth is expected to continue in these clusters to meet the growing demand for service. The Defense cluster encompasses the defense-related companies and contractors in the region that compete for annual obligation authority for defense contracts from the US Army Forces Command (FORSCOM). The benefits of military spending are evident through the defense contracts valued at more than \$1.4 billion that was awarded in the region in FY2020—impacting every single county in the region. Businesses in NC have received over \$17.18 billion in military contracts since 2005.²⁸

Companies based in Cumberland County, which is home to Fort Bragg, a military installation of the United States Army and the largest military installation in the world (by population) with more than 50,000 active-duty personnel, won the majority of regional contracts in FY2020. In FY2020, the Department of Defense contracted with regional businesses, spending \$1.3 billion in Cumberland County and \$243 million in Hoke County. DOD spent \$4.0 billion in Cumberland County and \$40 million in New Hanover County on personnel.²⁹

The tourism industry is a vital component of the regional economy. Tourism benefits each of the region's twelve counties. The region's natural scenic beauty, rich history, arts and culture, outdoor adventure, major military presence, vibrant cities, quaint small towns, and central east coast location make it an ideal travel destination. Direct air access into the state from national and international markets has helped to position it as a preferred international travel destination. In 2021, domestic travelers spent a record \$29 billion across the state, supporting nearly 200,000 jobs for North Carolina residents.³⁰ State and local tax revenues generated as a result of visitor spending totaled more than \$1.2 billion in 2021. Nationally, North Carolina ranks as the 6th most visited state.

As evident from Table 2, much of the SEDC region benefits from a strong tourism economy. In 2021, over \$3.2 billion was spent through tourism activities including lodging, food and beverages, recreation, retail, and transportation.³¹ Roughly 78% of the spending was concentrated in Brunswick, New Hanover, and Cumberland counties, so the impact was skewed toward the urban counties. Tourism has various impacts including creating jobs and attracting new residents and workforce, but it also offsets taxes paid by residents. The state and local tax savings per resident varied across the SEDC region reaching a high of almost \$5000 per resident in Brunswick County.

Table 2 2021 Visitor Spending by County

	Total Spending (Millions)	State/Local Tax Savings per Resident
Brunswick	\$975.11	\$4,929.00
New Hanover	\$930.40	\$6,142.00
Cumberland	\$608.85	\$4,556.00
Pender	\$165.29	\$924.00
Robeson	\$155.68	\$1,112.00
Harnett	\$104.52	\$758.00
Columbus	\$61.36	\$363.00
Bladen	\$56.95	\$248.00
Sampson	\$56.76	\$351.00
Richmond	\$54.99	\$400.00
Scotland	\$52.08	\$375.00
Hoke	\$13.53	\$96.00

Efficient and effective transportation of raw materials and end products is crucial to the economic success of the region. The presence of major four-lane highways, rail, airports, and water transport through ports located on the coast make this group of twelve counties a prime location for transportation and logistics businesses. Our region ranks behind the state's major metropolitan areas of Charlotte, the Research Triangle region, and the Piedmont Triad region for employment in this sector. However, transportation advantages coupled with the supply of vacant buildings make the region highly marketable to transportation and logistic companies. Today, the ability to integrate the means of shipping and to have strategically available warehousing is essential to managing costs and remaining competitive in the global marketplace. The presence of the Port of Wilmington enhances the location advantage for the export and import of products.

The region is becoming a rich area for emerging and diversified energy companies. Examples of energy development include natural gas, bio-fuels, bio-mass, and animal waste regeneration; solar panel and wind turbine component manufacturing; and solar panel fields. Bio-energy companies such as Chemtex, and Enviva have located facilities in the region. GE's nuclear energy research and development and component manufacturing division is headquartered in Wilmington.³²

With limited funding available for economic development investment, the region must focus on helping industries grow faster to attract and retain additional investment in the region by developing regionally significant initiatives for each of its eight key economic clusters.

Objective 1: Promote the regional clusters of economic development to enhance competitive advantages.

1.1 Strengthen partnerships between the community colleges, universities, K-12 schools, and strategic target industries to develop regionally based programs

1.2 Facilitate partnerships with business leaders in target sectors to address industry needs for retention and expansion.

Objective 2: Leverage the regional competitive advantages.

2.1 Promote tourism & economic activities through increased social media, website interaction, influencers, and media outlets.

2.2 Attract investment and resources to support agricultural biotechnology infrastructure.

2.3 Promote the region's natural heritage and cultural resources.

2.4 Provide technical assistance to inventory vacant buildings and analyze feasibility for renovation and reuse.

2.5 Advance logistics and distribution sectors to leverage the region's assets, including the Port of Wilmington, regional airports, industrial sites for distribution and logistics, and the highway network connection.

2.6 Advance the defense sector, leveraging numerous military and defense-related regional assets.

Offshore Wind Energy

Offshore wind energy is gaining intense focus in the SEDC region.^{17, 18} On June 9, 2021, Governor Roy Cooper issued Executive Order No. 218 highlighting North Carolina's commitment to offshore wind power as the state transitions to a clean energy economy. The Executive Order highlights the economic and environmental benefits of offshore wind and directs actions to help North Carolina secure the jobs and economic development associated with the industry's estimated \$140 billion investment over the next 15 years to develop projects from North Carolina up the Atlantic Coast. The order sets offshore wind development targets for North Carolina of 2.8 gigawatts by 2030 and 8.0 gigawatts by 2040. It establishes the NC Taskforce for Offshore Wind Economic Resource Strategies (NC TOWERS) to provide expert advice for advancing North Carolina offshore wind energy projects, economic development, and job creation. Lastly, it directs the Departments of Commerce, Military and Veterans Affairs, and Environmental Quality to determine and designate offshore wind leads and opportunities.

Objective 3: Encourage collaboration in marketing regional assets.

3.1 Analyze the existing and potential improved place brand for the region.

3.2 Develop a regional comprehensive marketing plan for the region and support organizations like NC Southeast that market the region.

3.3 Support international business recruitment and development and support organizations like NC Southeast that market the region.

Objective 4: Identify new adaptive capabilities of the regional economy

2.2a Attract investment and resources to support alternative energy industry infrastructure.

4.1 Support the development of a food processing initiative to add value to local foods.

4.2 Support the development of infrastructure and initiatives such as a regional biogas aggregator to support the conversion of waste to energy, waste to products, and wood and wood waste to renewable energy sources

4.3 Provide technical assistance for the development of a business and industry campus at key interstate connections.

4.6 Support the investment and development of businesses focused on environmental sustainability and the environmental sustainability of existing businesses, i.e. energy efficiency, clean tech, and recycling.

Performance Measures**Milestones**

- Complete a regional brand analysis.
- Complete a regional comprehensive marketing plan.
- Complete an inventory of vacant and industrial buildings and potential for reuse.

Metrics

- Revenue growth for key sectors.*
- Increase in regional efforts to strengthen a regional identity.
- The number of jobs generated by target sectors.*
- The number of international businesses recruited and/or developed in the region.
- Increase in cultural and natural heritage tourism opportunities.

- Increase in environmentally sustainable businesses and practices.

Figure 12 Brown Marsh Church near Clarkton



Goal 3: Investment in the connectivity and infrastructure of the region

Highly functional and integrated infrastructure is required to support economic growth, production, household activities, and development in the 21st century. To compete successfully in the global economy, the region must have infrastructure systems that are highly functional, strategic, and meet the basic needs of the region's residents. This reality becomes painfully evident, for example, when natural disasters impact regional infrastructure systems.

Transportation infrastructure, including roads, railways, airports, maritime facilities, and water and wastewater systems provide vital services to residents of the region, attract new business and industry, and support the existing business community. The current condition of regional infrastructure is similar to the state and nation, it needs investment and repair. Infrastructure investments have been made in the region through private and public sources, but there is much remaining to be accomplished. Interstates 95 and 40, together with US Highway 74, form a triangle of major highway

access across the region. This triangle stretches from Fayetteville to Wilmington and from Wilmington west toward Charlotte. Interstate 95 is a major north-south transportation corridor for the east coast. US Highway 74—the major east-west highway—has been designated by the NC Department of Transportation as a Strategic Transportation Corridor (STC). The designation recognizes the significance of this corridor to the future economic growth of the region and the State. Interstate 74 exists in a disconnected segment of the region. Future Interstate 74 is not scheduled for completion until after 2027.³³

Many opportunities for coordination exist between the Rural Transportation Planning Organizations and the Metropolitan Planning Organizations that serve the region.

The region still struggles with high-speed internet service availability and broadband width—the amount of data that can be carried over fiber. The ability of citizens, businesses, and industries to communicate, collaborate, and make transactions effectively and quickly underpins the economic success of the region. Broadband is essential to attract, retain, and expand job creation and private investment. According to North Carolina's Broadband Plan, counties struggling with economic development, high unemployment, and aging populations typically lack sufficient broadband capability.³⁴

Providing infrastructure services to meet the demands of businesses, households, and other users is one of the major challenges of economic development. The region has insufficient broadband service in the rural areas of the region. Water and wastewater facilities are aging or at capacity in the region. Housing availability and affordability continue to be significant deficiencies across the region.

Objective 1: Facilitate multi-modal transportation planning to address existing and future capacity deficiencies in the region.

1.1 Develop multi-modal and/or public transportation comprehensive plans for all twelve counties.

1.2 Facilitate planning for priority multimodal infrastructure across the region.

Objective 2: Identify and upgrade the infrastructure systems in the region— including water, waste water, power, transportation, rail, natural gas, and housing.

2.1 Complete regionally and locally significant high-priority infrastructure projects, i.e. I-74

2.2 Address the needs of utility systems facing moratoria and Standard orders of consent limits on new users.

2.3 Support the development of digital mapping capacity for water and wastewater systems and utilities.

2.4 Support the development of resources and infrastructure for regional water and wastewater systems.

2.5 Support the development of resources and infrastructure for a regional air freight terminal.

2.6 Support the development of resources and infrastructure for more robust natural gas distribution

Objective 3: Strategically expand the broadband infrastructure to support sustainable growth.

3.1 Establish a regional public/private broadband task force.

3.2 Develop a comprehensive assessment of current broadband access, bandwidth, and challenges across the region.

Objective 4: Enhance the capacity of the NC Ports to meet the needs of the region and state in the changing, global economy.

4.1 Improve rail connectivity and competitive service to expand the market for businesses throughout the region and state.

4.2 Improve distribution capabilities to attract new shippers to the NC Ports.

4.3 Improve and maintain the channel depth at the Port of Wilmington to increase opportunities for the region and state.

Performance Measures

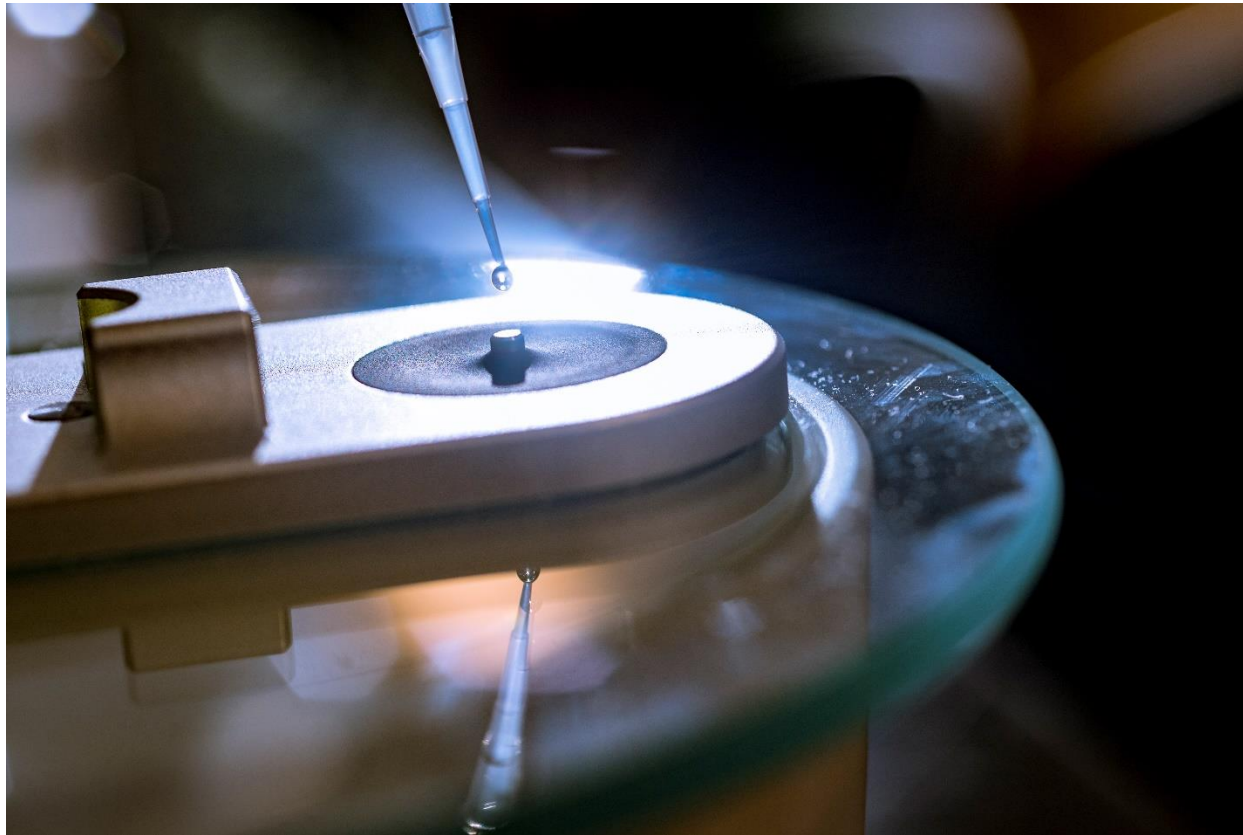
Milestones

- Establish a broadband task force.
- Comprehensive assessment of broadband access, bandwidth, and challenges.
- Multi-modal comprehensive transportation plans.
- Develop digital mapping capacity of water and waste water.
- Complete high-priority infrastructure projects.

Metrics

- The volume of freight movement in the region.*
- State and federal dollars that are invested in the region for infrastructure projects.
- Miles of interstate or 4-lane roads.*
- Number and amounts of infrastructure investments.

Figure 13 Manufacturing in the SEDC Region (Courtesy of UNCW)



Goal 4: Support the vitality of our diverse communities

Many rural communities are engaged in revitalization efforts to renew downtown areas and restore them to their former prominence as a center of community and economic activity. Downtown revitalization has been credited with creating jobs, strengthening the local economy, encouraging and supporting local entrepreneurship, increasing housing options, and attracting tourism.³⁵

The southeast region is known for its moderate climate, inexpensive cost of living, lower taxes, and outstanding medical care. Quality of life is a highly subjective measure of happiness, and a critical element to be included in economic development planning. Factors that play a role in the quality of life vary according to personal preferences, but they often include financial security, job satisfaction, family life, health, and safety.

The region has a lot to offer when it comes to discovering cultural heritage and exploring the great outdoors. In 2010, the Lumber River was voted one of North Carolina's Ten Natural Wonders by the Land of Tomorrow.

The SEDC region's population grew by 111,430 people between 2010 and 2020 to 1,339,590. In 2020, 16.2% of the population was 65 years and older. In 2019, NC had more people 60 and over than those under 18 years. By 2025, this imbalance will be the norm in 88 counties and by 2038, 95 counties.³⁶ Among North Carolina counties, the percentage of residents 65 and older ranges from 9% to 31%, and by 2035, 20% of North Carolinians will be aged 65 and older.³⁷

Figure 14 NC Population Change³⁶

NC Population Change 2018-2038					
Age	2018		2038		% Change 2018-2038
	#	%	#	%	
Total	10,389,148		12,799,658		23%
0-17	2,311,348	22%	2,633,159	21%	14%
18-44	3,689,649	36%	4,435,853	35%	20%
45-59	2,075,879	20%	2,334,589	18%	13%
60+	2,312,272	22%	3,396,057	27%	47%
65+	1,676,545	16%	2,696,529	21%	61%
85+	186,059	2%	397,328	3%	114%

Source: NC Office of State Budget and Management, Facts and Figures

From 2010 to 2020 the Bladen, Cumberland, Richmond, Sampson, and Scotland counties experienced a loss of population in the 20-24 age group resulting from "Brain-Drain" or the loss of college-aged young adults who leave the region and do not return. Columbus, Richmond, and Scotland counties also experienced a drop in the population of 19 and under. In eight of the twelve counties in the SEDC region, the percentage of 65 and older residents is projected to be higher than the statewide average. The population of residents 65 and older in the SEDC region will increase from 239,000 in 2020 to 307,000 by 2030.³⁷ In Brunswick County, over 30% of residents will be 65 and older by 2030. There

are two Certified Retirement Communities in the region—Laurinburg/Scotland County and Lumberton. Health care facilities, housing, and other services pertinent to residents who are 65 and older will be increasingly important in the region.

The SEDC region is not only growing but also changing. To achieve greater equity and opportunity, leaders need to bolster a vital, diverse, and growing economy that advances individual and community prosperity. Preserving the region's assets is critical to creating revitalized, resilient, and vibrant communities.

Objective 1: Promote environmentally sustainable and resilient patterns of development.

- 1.1 Identify development corridors and connect cross-jurisdictional planning to support development within the region.
- 1.2 Support an educational forum on sustainable development and management practices for the region.
- 1.3 Provide technical assistance for planning and mapping the region's "green infrastructure" and natural heritage gems.
- 1.4 Support energy-efficient construction in public buildings.
- 1.5 Support disaster risk reduction and long-term resiliency efforts related to infrastructure and services.

Objective 2: Revitalize downtowns across the region.

- 2.1 Provide technical assistance to help jurisdictions follow Main Street Communities' tenets/guidelines.
- 2.2 Encourage adaptive reuse and historic preservation of priority buildings.
- 2.3 Promote vibrancy and prosperity in the downtowns across the region through business development that respects the character and needs of the community.

Objective 3: Strengthen the local food network throughout the region.

- 3.1 Support the creation of a Southeastern NC Regional Sustainable Local Food Advisory Council.
- 3.2 Provide technical assistance to assist the NCDA&CS Southeastern N.C. Agricultural Events Center to implement a strategic plan for improved market access for the region's farmers.
- 3.3 Identify and pursue more distribution points for local foods throughout the region.

3.4 Support the work of Feast Down East and other organizations that support farm businesses, market and distribute local products, increase access to local foods, and educate the public on the importance of buying local foods.

Objective 4: Invest in healthy, safe, and walkable communities.

4.1 Ensure that each county in the region has a comprehensive transportation plan that addresses healthy, safe, and walkable communities.

4.2 Provide technical assistance to local governments in developing sidewalk ordinances and incorporation of greenways.

4.3 Encourage multi-modal transportation alternatives to create healthy opportunities.

4.4 Support initiatives to give greater access to cutting-edge medical technology and clinical trials for rural citizens.

4.5 Support implementation of the bicycle and pedestrian elements of the transportation plans mentioned above.

Performance Measures

Milestones

- Establish a regional program to link local producers to markets.
- Identify development corridors within the region.
- Restoration or preservation of downtowns.

Metrics

- Number of Main Street Communities
- Number of miles of bike and pedestrian transportation options*
- Linear miles of sidewalks that are established.*
- The number of buildings reused, funds invested and jobs created.
- Percentage increase in local food produced and sold to regional markets.*
- Jobs created in local food networks.*

Goal 5: Develop a sustainable and inclusive workforce for the future

Years ago, many were only interested in the local economy. Advances in communications and technology have shifted focus to a global frame of reference. How the region prepares to participate in a global environment determines its success. The workforce must be skilled, healthy, agile, and adaptable to succeed. The education, training, and guidance

provided to our region's youth, in particular, will greatly influence the region's economic future. Developing a healthy and vibrant workforce that is ready for a global economy is the SEDC region's priority.

Education and training are strongly correlated with economic growth.³⁸ Higher levels of educational attainment can lead to a skilled and productive workforce. During stakeholder meetings, attendees mentioned the gap between the region's workforce skills, training, qualifications, and industry needs. To address the region's growing gaps, attendees suggested improving high school graduation rates, degree and certification completions, vocational training programs, and expanding on-the-job training opportunities like internships and apprenticeships. In addition, stakeholders mentioned improving the focus on long-term education challenges to attract students to science, technology, engineering, and mathematics. It was agreed that all regional organizations have a role to play in this significant endeavor such as non-profits, private companies, K-12 schools, community colleges, and universities.

The diverse demographic nature of the region makes a "one-size-fits-all" approach to educational attainment inadequate to meet today's challenges. For many of the counties with low-incomes and high poverty which influence educational attainment, the challenge to integrate a STEM education curriculum will likely be significant due to budget constraints. In addition, concern continues to grow in the region for the students with a desire and talent for skilled trades that are not met in a system that encourages its students toward a four-year college education. A parallel track of educating students about the opportunities found in skilled trade jobs must be pursued also. Elevating the trade career tracks by involving industries, economic developers, and educators in marketing to these students is essential for the region's economic future.

Work ethic and soft skills are increasingly becoming the hard skills of today's workforce. It's just not enough to have a highly trained workforce in technical skills, without developing the softer, interpersonal, and relationship-building skills that help people to communicate and collaborate effectively. The work ethic of this generation continues to be noted as one of the biggest challenges for employers. One employer was quoted as saying, "Getting people to work on time and drug-free and alcohol-free is my biggest challenge".

Childcare plays a very important role in the region's current economy because it enables parents to work and/or update their skills. Sufficient childcare enables employers to attract and retain employees and increase their productivity. Similar to transportation and housing, without accessible and affordable childcare, employees may experience barriers to working, which negatively impacts their employers and the economy as a whole. Therefore, the region needs accessible, affordable, and high-quality childcare options in the region to support the workforce and job training and education for the labor force.³⁹

The region continues to focus on attracting and retaining high-skill industries. The ability for industries to grow and thrive in the future will depend on the region's continued ability to cultivate a healthy, skilled, and vibrant workforce.

Talent development is needed to support key sectors that drive economic growth and promote high-wage, high-skill, high-demand jobs. There needs to be a focus on efforts that provide education, job training, and support services to people working hard to improve their economic circumstances.

Objective 1: Cultivate a skilled workforce to support key industry sectors that drive economic growth.

- 1.1 Enhance educational opportunities and resources in science, technology, engineering, and math (STEM) disciplines.
- 1.2 Expand leadership training opportunities for young adults—including summer programs.
- 1.3 Expand innovative career pathway programs to prepare workers for high-skill jobs.
- 1.4 Develop strategies to strengthen the connection between educational providers and industry/businesses with sector-focused continuing education.
- 1.5 Facilitate the incorporation of soft skills, work ethics, and healthy lifestyles in K-12 education to prepare students for employment.
- 1.6 Promote apprenticeship and internship programs by companies in the region, similar to NC Works.
- 1.7 Expand promotion of the Career Readiness Certificate (CRC) program among students, low-skill workers, and employers.
- 1.8 Expand participation in degree programs for veterans and service personnel exiting the military.
- 1.9 Support the creation of and preparation of the workforce for jobs offering “family-sustaining wages”.

Objective 2: Increase accessible, affordable, and high-quality childcare options across the region.

- 2.1 Coordinate planning to assess childcare needs, share data, conduct an asset map, and identify barriers.
- 2.2 Promote the state's professional development options for the early childhood workforce.

Objective 3: Improve the digital literacy and technical skills of the workforce in the region.

3.1 Assess and enhance the region's existing resources that support the tech-ready workforce.

Objective 4: Strengthen education across the continuum from pre-school through lifelong learning.

4.1 Monitor and improve educational outcomes at all levels of education.

4.2 Increase educational attainment to meet the needs of the current and future economy and to increase skills, certifications, qualifications, and degrees in industries that are in high demand and deliver a high economic multiplier.

4.3 Support existing and new community college and university degree programs that are needed for regional prosperity.

Performance Measures***Milestones***

- Strategies developed for the enhancement of skilled trade and STEM education.
- Complete inventory of technology training programs.

Metrics

- The number of new leadership training opportunities.
- Increase in the number of skilled trade students.
- The number of apprenticeship and internship programs created and students enrolled.
- Number of CRCs issued in the region.*
- Increase in the labor participation rate.
- Change in educational attainment.*
- The number of new entrepreneurs/businesses.*
- Increase per capita income.

Figure 15 Life Sciences in the SEDC Region (Courtesy of UNCW)



Goal 6: Encourage collaborative economic partnerships to promote innovation and entrepreneurship to support the growth and expansion of the business community and attract new employers to the region

Regional Business Needs Interviews

To understand how the COVID pandemic, natural disasters, and macroeconomic, regional, and local events have challenged or improved regional business success in the last few years, a “Business Needs Questionnaire” was created. The questionnaire contained eight questions and business leaders across the region were interviewed via phone. Business sizes ranged from 1 to 55 employees and represented information technology, biotechnology, financial, retail,

manufacturing, and engineering industries. A full list of businesses can be found in Appendix 2. In general, business leaders' main concerns centered on the workforce (qualifications, skills, wages, housing), supply chain, capital for tech/biotech companies, and a lack of awareness about service providers. Approximately thirty businesses were contacted, and 16 interviews were conducted. Results are displayed in the following tables which show questions and a summary of the interviewees' comments.

1. Is your business performing to your expectations?

Over 90% of respondents answered yes to this question

2. How confident are you in your:**a. Workforce and ability to find qualified workers?**

Approximately 75% of interviewees who had employees answered no to this question, indicating that the workforce was their greatest challenge. Some cited their business's inability to compete with larger metro-areas like the Triangle, Triad, or Charlotte, where workers can earn higher wages and often receive better incentives and benefits. Manufacturing companies cited difficulty finding qualified workers, employee turnover, and the high wages that employees currently expect. One business leader stated that wages have increased 80-90% in just the last 5 years. Two businesses praised their local community college for workforce assistance.

b. Supply chain and ability to get material that is critical to your business?

Approximately 50% of all interviewees answered positively to this question, while 80% of manufacturers were negative, claiming to have supply chain issues. One interviewee mentioned that they were unable to get the needed machinery on time. Another business had difficulty getting styrofoam coolers for cold storage and shipping. One interviewee was exasperated by their inability to get needed supplies. Unfortunately, regional manufacturers, like their state and nationwide counterparts, are still struggling with supply chain issues.

c. Distribution channels?

100% of interviewees answered positively to this question.

d. Financing and access to capital?

100% of interviewees answered positively to this question. There were a variety of ways that businesses accessed capital including bank loans, venture capital, angel investors, and investment from individuals. Some worried about rising interest rates. Two business leaders mentioned that southeast NC does not attract enough investment and that businesses here are forced to offer more equity to lure investors.

3. Because of the COVID pandemic, natural disasters, or other emergencies, have you received grants, low-cost loans, or other financial assistance in the last two years? What was beneficial or not about the assistance?

Over 75% of interviewees received financial assistance, mainly PPP loans. Respondents who received funding assistance were grateful for the funds and stated that the funding helped them keep their businesses operational and prevented employee losses.

4. Are you aware of the following services:

a. small business center (SBC)

Approximately 50% of interviewees answered yes

b. small business technology and development center (SBTDC)

Approximately 50% of interviewees answered yes

c. your local chamber's business services

Approximately 75% of interviewees answered yes

d. local coworking/incubator/entrepreneurship centers

Approximately 75% of interviewees answered yes

e. services through your county's economic development office

Approximately 50% of interviewees answered yes

f. your region's workforce development services

Approximately 50% of interviewees answered yes

5. How do you interact with business and entrepreneurship support services like the ones listed above?

Most interviewees interacted with the local coworking, entrepreneurship, and incubator services, and some businesses were even housed in those locations. About half of the interviewees interacted with either the SBC or SBTDC and received valuable advice from staff on an as-needed basis. Some of the advice was simply connecting the business to outside help or expertise like accountants or lawyers. Most interviewees were aware of their local chamber's services, though the majority doubted that their businesses were a good fit for those services. For example, the chamber was not a good fit for promoting or helping a fast-growing tech company in need of venture capital and highly-trained talent. None of the interviewees maintained negative opinions of the services they were aware of.

6. Of all the support services available to you (that you know of):

a. What is working well?

In general, interviewees were positive about the range of services available and the help available. There were positive comments about every service listed in question 4 and about additional services like community colleges, NCWorks, and even office stores like BestBuy. From these interviews, it is clear that the SEDC region has an ample array of business support services.

b. What could be improved?

All interviewees believed that service providers need to improve marketing, promotion, awareness, and visibility. Many respondents were surprised by the range of resources and wanted to learn more. Despite the service choices, a few interviewees stated that the region is not producing qualified and skilled workers for their businesses, especially in technology fields.

7. Have you done any resiliency planning?

About 75% of interviewees answered yes, taking steps such as cross-training employees, succession planning, storing materials in safe and/or separate locations, and building redundancy in the event of a business disruption.

8. Would you like to comment on anything that has not been addressed by this questionnaire?

About 75% of interviewees mentioned that the cost of housing and payroll inflation has made it difficult to compete with larger metro-areas for workers. Most were happy leading their businesses in southeastern NC, but housing and workforce issues were a cause for concern. All interviewees were uncertain about the next several years because of a belief in a looming recession, uncertainty about global geopolitics, another round of COVID, or natural disasters. All interviewees seemed pleased to talk about their challenges and were positive about participating in the interviews.

Business Pulse Survey

NC Commerce has been conducting a monthly Business Pulse Survey since October 2021.^{40, 41} The survey measures changes in business conditions, attitudes, and behaviors over time - particularly about staffing. Though it is a statewide survey, its focus on leaders' confidence and outlook on their businesses yields valuable complementary information to the Business Needs Questionnaire results reviewed in the previous section. Full results can be found in Appendix 3.

According to the Business Pulse Survey results, businesses across the state are still more uneasy about their supply chain and obtaining inputs than staffing, financing, or health concerns. Businesses' ability to access capital and staffing needs have leveled off but recently, more businesses failed to meet their revenue expectations. Businesses that permit remote-work are seeing a slight increase in the percentage of their workforce that is working remotely. Respondents do not plan on making significant changes to their businesses. Similar to the findings of the Business needs Questionnaire, businesses felt confident in their ability to find workers and are optimistic about the next six months.

Economic development focused on the recruitment of large industries to the region once generated the jobs and wages to sustain the region's economy. When these plants abandoned the region for cheaper labor overseas, the region experienced a tremendous loss of jobs leaving a record number of people unemployed. While some of these manufacturing facilities still exist in the region and are a vital part of the economy, diversifying the job base to include small businesses and entrepreneurs is an essential strategy to secure the economic future of the region. A priority for this region is to develop a supportive ecosystem that proactively supports the development of new and existing small businesses.

Small businesses are an essential component of a strong local economy. They not only create well-paying jobs in the region, but also deliver vital goods and services, generate sales tax revenue, and contribute to the unique character and livability of neighborhoods. Startups and small businesses tend to be more agile, enabling them to innovate more.

Entrepreneurs and small businesses should have easy access to the tools that will help them succeed. The region has many resources available to support entrepreneurs and small business growth. The Small Business Centers at the eight community colleges in the region, and the Small Business and Technology Development Centers associated with the three four-year state universities provide expertise and guidance. Area non-profit lenders such as Self-Help, Advancement, Inc., the Carolina Small Business Development Fund, and other local entities provide capital as well as business support services. The Regional Workforce Development Boards are the designated entities for planning and implementing strategies to advance the needs of workers and employers through education and training for emerging high-growth industries across the region.

The Thomas Family Center for Entrepreneurship at the University of North Carolina at Pembroke recognizes the correlation between economic development and entrepreneurship. Its ambition is to stimulate entrepreneurial thinking amongst the UNCP student body as well as assist and support entrepreneurs and new ventures in the Southeastern North Carolina region.

At the University of North Carolina at Wilmington, the Center for Innovation and Entrepreneurship (CIE) nurtures emerging companies and works to grow the entrepreneurial ecosystem of the region, through events, education and training programs, and mentoring. The CIE is a vibrant and creative hub where the private sector joins with its faculty and students to create and accelerate high-growth, high-impact companies. Regional strengths and university expertise combine to develop innovative solutions to global challenges, especially in the areas of human health, education, coastal and marine environments, and media production.

The Southeastern Economic Development Commission works collaboratively with The Southeastern Partnership, Inc. to promote and enhance the region's assets to cultivate sustainable economic opportunities. The Southeastern Partnership, Inc. provides strong economic development leadership in southeastern North Carolina, including eleven of the twelve counties in the SEDC region, through innovative marketing and collaborative regional initiatives that support the creation of new jobs, generate capital investment, expands existing industries, and attracts new employers in the region.

Supporting existing industry in the region is vital to healthy economic growth and is an important component of any economic development strategy. It is essential that the region grows existing industries and builds on their foundations, skills, and capabilities.

Economic and workforce development organizations have three ways of facilitating the creation of jobs and private in the region—growth and expansion of existing businesses, creation of new businesses, and attraction of new employers in the region. A holistic economic development strategy should, ideally, include a combination of these three elements. It is essential to foster economic development in the region by improving access to capital and business services to support entrepreneurs, small and existing businesses, and new employers.

Objective 1: Foster entrepreneurs and small businesses to create job opportunities for the region's workforce and strengthen the regional economy.

- 1.1 Conduct an inventory of entrepreneurial education resources, mentorship, and internship opportunities.
- 1.2 Provide technical assistance to expand and strengthen existing entrepreneurial and small business support key economic cluster networks in rural areas.
- 1.3 Attract technical assistance and resources to expand the network of business incubators and growth pipeline in the region.
- 1.4 Support the development of a new EDA Revolving Loan Fund (RLF) throughout the region.
- 1.5 Promote educational programs and one-on-one business counseling to entrepreneurs through the SBTDCs, small business centers at the community colleges, and other service providers.

Objective 2: Grow and retain existing industry and small businesses

- 2.1 Promote international growth opportunities for companies.
- 2.2 Collaborate with state and regional resources to help companies with government procurement and contracting process.
- 2.3 Encourage each county and/or community college jurisdiction to prioritize existing industries as an important part of their economic development efforts to include existing industry visits annually by a team comprised of a representative from the local community college workforce training, NC Works, Veterans Affairs training, SBTDC and others that can assist the industry with training opportunities, expansion assistance and local/state issues.

Objective 3: Foster a creative, innovative environment across the region.

- 3.1 Improve access to capital for businesses.

3.2 Support innovative action plans developed in local communities through collaborative processes.

3.3 Encourage participation and provide training for federal grant programs that foster innovation and commercialization of technology, such as the SBIR/STTR grant programs

Performance Measures

Milestones

- Complete inventory of entrepreneurial education resources.
- Partner with other funders.

Metrics

- Amount of incubator space available and occupied.*
- The number of new businesses created.*
- Increase in government contracts awarded to companies in the region.
- Increase in exports.
- The number of jobs created and/or retained.
- The number of existing industry visits by each jurisdiction.
- Amount of private investment in the region.
- Increase the labor force participation rate

Figure 16 Lake Waccamaw Pier (Courtesy of Grace Lawrence)



Evaluation Framework

The Evaluation Framework is the implementation schedule of the CEDS. The performance measures for each goal are referenced with strategic partners and within an estimated timeframe for completion.

Goal Performance Measures and Strategic Partners

Timeframe

- Short (1-3 years)
- Mid (3-5 years)
- Long (5+ years)

Goal 1: Population Growth and Management

- Complete an inventory of available and affordable housing. SEDC, EDCs, NCSE, COGs, Local Governments, Universities (Mid)
- Complete an inventory of housing-related programs and organizations. SEDC, EDCs, NCSE, COGs, Local Governments, Universities (Mid)

Goal 2: Competitive Advantage

- Complete regional brand analysis. SEDC, EDCs, NCSE, COGs, Universities (Mid)
- Complete regional comprehensive marketing plan. SEDC, EDCs, NCSE, Local Governments, COGs, NCDL (Mid)
- Complete inventory of vacant buildings and potential for reuse. EDCs, NCSE (Short)

Goal 3: Regional Infrastructure

- Inventory of available and affordable housing. COGs, Local Governments, Housing Authorities (Short)
- Inventory of housing-related programs and organizations. COGs, Local Governments, Housing Authorities (Short)
- Establish a regional public/private broadband task force. SEDC, COGs, Local Governments, NCDL Mid
- Comprehensive assessment of broadband access, bandwidth, and challenges. Service Providers, COGs, Local Governments (Mid)
- Update or develop multi-modal comprehensive transportation plans. COGs, Local Governments, NCDOT (Mid)
- Develop digital mapping capacity of water and waste water. COGs, Local Governments (Long)
- Complete high-priority infrastructure projects. SEDC, MPOs, RPOs, Local Governments (Long)

Goal 4: Revitalized and Vibrant Communities

- Establish a regional program to link local producers to markets. Feast Down East, NCDA, Local Farmers Mid
- Identify development corridors within the region. SEDC, COGs, NCSE, EDCs, Local Governments Mid

- Restoration or preservation of downtowns. SEDC, Local Governments, NCDRC Long

Goal 5: Healthy and Innovative People

- Strategies for enhancement of skilled trade and STEM education. SEDC, COGs, RWDBs, K-12, Community colleges, Universities, Private Sector Partners Long
- Complete inventory of technology training programs. SEDC, COGS, RWDBs, Community Colleges, Universities, SBTDCs. Short

Goal 6: Entrepreneurs and Small Business Growth

- Complete inventory of entrepreneurial education resources. SEDC, COGs, SBTDC, SBCs, Community Colleges, Universities, EDCs Short
- Partner with the Carolina Small Business Development Fund. SEDC, CSBDF Short

The Importance of Performance Measures

It is of utmost importance that the SEDC Economic Development District (EDD) be able to measure its performance to evaluate the successful implementation and development of the CEDS. Quantitative and qualitative measures have been established to provide an objective way to measure progress toward achieving the goals identified for the region. These measures will be reviewed on an annual basis within a CEDS progress report submitted to EDA by the SEDC.

The performance measures have been identified, as required by the Economic Development Administration, to evaluate the progress of the activities outlined in the CEDS. In addition to the performance measures identified under each goal, the SEDC EDD will continue to track the number of jobs created in the region; the number and types of investments undertaken in the region; the number of jobs retained in the region; the amount of private sector investment in the region; and changes in the economic environment of the region.

Specific Measurable Targets

The measurable outcomes shown below will be both direct and indirect results of the implementation of the CEDS. The process will be ongoing and cumulative. The SEDC EDD will focus on all goals and strategies identified by the Strategy Committee and other local economic development strategies aimed at sustainable job creation and private investment. The District will work closely with public and private allies and strategic partners in the region to bring sustainable economic advancement to southeastern North Carolina.

The SEDC Economic Development District has established the following quantifiable performance measures to specifically address the regulatory requirements of the Economic Development Administration:

1) New Jobs

2,500 New jobs created in the region by September 2027.

2) Number and types of investments undertaken in the region by September 2027

30 Infrastructure investments

10 Facility investments

6 Technical Assistance investments

3) Retained Jobs

2,000 Jobs retained in the region by September 2027.

4) Private Sector Investment

\$250,000,000 in private sector investment in the region by September 2027.

5) Changes in the economic environment of the region:

The economic environment for the region will show significant improvement over the next five years. Changes in the economic environment relate to changes in the wider economy. Indicators such as the current and projected economic growth, inflation and interest rates; unemployment and labor supply; labor costs; levels of disposable income and income distribution; the impact of globalization; and the likely impact of technological or other change on the wider economy will be evaluated to determine significant changes of the economic environment of the region by September 2027.

Acknowledgments

As highlighted in the CEDS, the region covers a large geographic area with unique cultural, racial, and wealth diversity. Indeed, the region contains some of the poorest and some of the wealthiest counties in the State. Educational attainment levels vary, and the region has historically relied on large manufacturing investments to provide jobs and income. Today, the challenge is to leverage the region's strengths to ensure that all citizens realize economic prosperity, and the SEDC is committed to leading regional prosperity, where citizens are healthy, connected, and proud of their communities.

SEDC Staff

Pamela H. Bostic, Executive Director, Southeastern Economic Development Commission

Funding Partners

US Economic Development Administration

Consulting Team

WithersRavenel is a multidisciplinary firm creating inspiring places one person, one project, and one community at a time. As a 100% employee-owned company, we give, grow, and create together. Our employees are empowered to deliver an exceptional client experience because when you succeed, we all thrive.



WithersRavenel has Certified Economic Developers who understand the regulations and deadlines that drive the economic development process, and we deliver timely solutions every step of the way. We have extensive experience with site readiness, due diligence, site development, and strategy projects. The WithersRavenel economic development team can position your community for success.

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Appendix 1 Top Employers in Each County

Table 3 Bladen County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Smithfield Foods Inc	Manufacturing	Private Sector	1000+	1
Gildan Yarns Llc	Manufacturing	Private Sector	1000+	2
Bladen County Schools	Educational Services	Public Sector	500-999	3
The County Of Bladen	Public Administration	Public Sector	250-499	4
C R England Inc	Transportation and Warehousing	Private Sector	250-499	5
Specialty Product Technologies	Manufacturing	Private Sector	250-499	6
First Source Staffing Services Llc	Administrative and Support and Waste Management and Remediation Services	Private Sector	250-499	7
Cape Fear Valley Health Systems	Health Care and Social Assistance	Public Sector	100-249	8
Packers Sanitation Services Inc	Administrative and Support and Waste Management and Remediation Services	Private Sector	100-249	9
Bladen Community College	Educational Services	Public Sector	100-249	10

Table 4 Brunswick County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Brunswick County Board Of Education	Educational Services	Public Sector	1000+	1
County Of Brunswick	Public Administration	Public Sector	1000+	2
Wal-Mart Associates Inc.	Retail Trade	Private Sector	500-999	3
Progress Energy Service Co	Utilities	Private Sector	500-999	4
Brunswick Novant Medical Ctr.	Health Care and Social Assistance	Private Sector	500-999	5
Food Lion	Retail Trade	Private Sector	250-499	6
Lowes Foods Llc	Retail Trade	Private Sector	250-499	7
Brunswick Community College	Educational Services	Public Sector	250-499	8
Victaulic Co	Manufacturing	Private Sector	250-499	9
Lowes Home Centers Inc	Retail Trade	Private Sector	250-499	10

Table 5 Columbus County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Employer Hr Llc	Administrative and Support and Waste Management and Remediation Services	Private Sector	1000+	1
Columbus County Board Of Education	Educational Services	Public Sector	500-999	2
Dept Of Public Safety	Public Administration	Public Sector	500-999	3
International Paper Company	Manufacturing	Private Sector	500-999	4
Columbus Regional Healthcare System	Health Care and Social Assistance	Private Sector	500-999	5
Columbus County	Public Administration	Public Sector	500-999	6
Whiteville City Schools	Educational Services	Public Sector	250-499	7
Bb& T	Finance and Insurance	Private Sector	250-499	8
Atlantic Corporation Of Wilmington	Manufacturing	Private Sector	250-499	9
Employers Personnel Llc	Professional Scientific and Technical Services	Private Sector	250-499	10

Table 6 Cumberland County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Defense Ex Army Navy & Air Force	Public Administration	Public Sector	1000+	1
Cumberland County Schools	Educational Services	Public Sector	1000+	2
Cape Fear Valley Health Systems	Health Care and Social Assistance	Public Sector	1000+	3
Wal-Mart Associates Inc.	Retail Trade	Private Sector	1000+	4
Goodyear Tire And Rubber Inc	Manufacturing	Private Sector	1000+	5
County Of Cumberland	Public Administration	Public Sector	1000+	6
City Of Fayetteville	Public Administration	Public Sector	1000+	7
Veterans Administration Va Ro318	Health Care and Social Assistance	Public Sector	1000+	8
Fayetteville Technical Com College	Educational Services	Public Sector	1000+	9
Mann+hummel Purolator Filters Llc	Manufacturing	Private Sector	1000+	10

Table 7 Harnett County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Harnett County Schools	Educational Services	Public Sector	1000+	1
Campbell University Inc.	Educational Services	Private Sector	1000+	2
Food Lion	Retail Trade	Private Sector	1000+	3
County Of Harnett	Public Administration	Public Sector	500-999	4
Betsy Johnson Memorial Hospital	Health Care and Social Assistance	Public Sector	500-999	5
Wal-Mart Associates Inc.	Retail Trade	Private Sector	500-999	6
Rooms To Go	Retail Trade	Private Sector	250-499	7
Carlie C's Operation Center Inc	Retail Trade	Private Sector	250-499	8
Dept Of Public Safety	Public Administration	Public Sector	250-499	9
Champion Home Builders Inc	Manufacturing	Private Sector	100-249	10

Table 8 Hoke County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Hoke County Board Of Education	Educational Services	Public Sector	1000+	1
Butterball Llc	Manufacturing	Private Sector	500-999	2
Office Of County Auditor	Public Administration	Public Sector	250-499	3
Burlington Industries	Manufacturing	Private Sector	250-499	4
Conopco Inc	Manufacturing	Private Sector	250-499	5
Cape Fear Valley Health Systems	Health Care and Social Assistance	Public Sector	250-499	6
Firsthealth Of The Carolinas Inc	Health Care and Social Assistance	Private Sector	250-499	7
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	8
Serenity Therapeutic Services Llc	Health Care and Social Assistance	Private Sector	100-249	9
Fedex Ground Package System Inc	Transportation and Warehousing	Private Sector	100-249	10

Table 9 New Hanover County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Novant Health New Hanover Regional	Health Care and Social Assistance	Private Sector	1000+	1
New Hanover County School System	Educational Services	Public Sector	1000+	2
University Of North Carolina At Wil	Educational Services	Public Sector	1000+	3
Ppd Development Llc	Professional Scientific and Technical Services	Private Sector	1000+	4
County Of New Hanover	Public Administration	Public Sector	1000+	5
Wal-Mart Associates Inc.	Retail Trade	Private Sector	1000+	6
Payroll Department	Educational Services	Public Sector	1000+	7
City Of Wilmington Nc	Public Administration	Public Sector	1000+	8
Corning Incorporated	Manufacturing	Private Sector	500-999	9
Ncino Inc.	Information	Private Sector	500-999	10

Table 10 Pender County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Pender County Schools	Educational Services	Public Sector	1000+	1
Medical Edge Recruitment Llc	Administrative and Support and Waste Management and Remediation Services	Private Sector	500-999	2
Pender County N C	Public Administration	Public Sector	250-499	3
Rc Creations Llc	Wholesale Trade	Private Sector	250-499	4
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	5
Pender Memorial Hospital Inc	Health Care and Social Assistance	Public Sector	250-499	6
Dept Of Public Safety	Public Administration	Public Sector	100-249	7
Lowes Home Centers Inc	Retail Trade	Private Sector	100-249	8
Pender Ems And Fire Inc	Health Care and Social Assistance	Private Sector	100-249	9
Food Lion	Retail Trade	Private Sector	100-249	10

Table 11 Richmond County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Richmond County Schools	Educational Services	Public Sector	1000+	1
Perdue Farms Incorporated	Manufacturing	Private Sector	1000+	2
Firsthealth Of The Carolinas Inc	Health Care and Social Assistance	Private Sector	500-999	3
Richmond County Government	Public Administration	Public Sector	250-499	4
Richmond Community College	Educational Services	Public Sector	250-499	5
Plastek Industries Inc	Manufacturing	Private Sector	250-499	6
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	7
Cascades Moulded Pulp	Manufacturing	Private Sector	250-499	8
Burlington Industries	Manufacturing	Private Sector	250-499	9
Dept Of Public Safety	Public Administration	Public Sector	100-249	10

Table 12 Robeson County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Public Schools Of Robeson County	Educational Services	Public Sector	1000+	1
Mountaire Farms Of Nc Inc	Manufacturing	Private Sector	1000+	2
Southeastern Regional Medical Ctr	Health Care and Social Assistance	Private Sector	1000+	3
Campbell Soup Supply Company Llc	Manufacturing	Private Sector	1000+	4
Robeson County Finance Dept	Public Administration	Public Sector	1000+	5
Wal-Mart Associates Inc.	Retail Trade	Private Sector	1000+	6
Unc Pembroke	Educational Services	Public Sector	1000+	7
Two Hawk Employment Services Llc	Administrative and Support and Waste Management and Remediation Services	Private Sector	250-499	8
Primary Health Choice Inc	Health Care and Social Assistance	Private Sector	250-499	9
Mcdonalds	Accommodation and Food Services	Private Sector	250-499	10

Table 14 Sampson County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Smithfield Foods Inc	Manufacturing	Private Sector	1000+	1
Sampson County Schools	Educational Services	Public Sector	1000+	2
Prestage Farms Inc	Agriculture Forestry Fishing and Hunting	Private Sector	500-999	3
County Of Sampson	Public Administration	Public Sector	500-999	4
Hog Slat Inc	Manufacturing	Private Sector	500-999	5
Clinton City Schools	Educational Services	Public Sector	250-499	6
Sampson Regional Medical Center	Health Care and Social Assistance	Public Sector	250-499	7
Mears Construction Of Ga Llc	Construction	Private Sector	250-499	8
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	9
Sampson Community College	Educational Services	Public Sector	250-499	10

Table 15 Scotland County's Top Employers (1st Quarter, 2022) ⁴²

Company Name	Industry	Class	Employment Range	Rank
Scotland Memorial Hospital (A Corp)	Health Care and Social Assistance	Private Sector	500-999	1
Scotland County Schools	Educational Services	Public Sector	500-999	2
Dept Of Public Safety	Public Administration	Public Sector	500-999	3
Scotland County	Public Administration	Public Sector	250-499	4
Meritor Heavy Vehicle Systems Llc	Manufacturing	Private Sector	250-499	5
Pilkington North America Inc	Manufacturing	Private Sector	250-499	6
Hanesbrands Inc	Manufacturing	Private Sector	250-499	7
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	8
Fcc (North Carolina) Llc	Manufacturing	Private Sector	250-499	9
St Andrews University	Educational Services	Private Sector	100-249	10

Appendix 2: Business Needs Questionnaire: Business Information

The following businesses were interviewed via phone in all but two cases.

Blair-HSM, Brunswick County

Butler and Faircloth Realtors, Sampson County

Cape Fear Vineyard & Winery, Bladen County

Electronic Lab Logs, New Hanover County

Global ETF Advisors, New Hanover County

Highland Roofing Company, New Hanover County

Lapetus Solutions, Inc, New Hanover County

Merrill Lynch Wealth Management, Cumberland County

MojoTone, Pender County

PrecisionSwiss Products, Brunswick County

SeaTox Research Inc., New Hanover County

Sentinel Fence, Robeson County

Smart Moves Consulting, New Hanover County

Southern Elegance Candle Company, Hoke County

Twiddle Dee Farm, Sampson County

Wellness Massage, New Hanover County

Appendix 3 NC Business Pulse Survey

NC Commerce Business Pulse Results for September 2022

North Carolina Business Pulse Survey September 2022



**NC DEPARTMENT
of COMMERCE**
LABOR & ECONOMIC
ANALYSIS

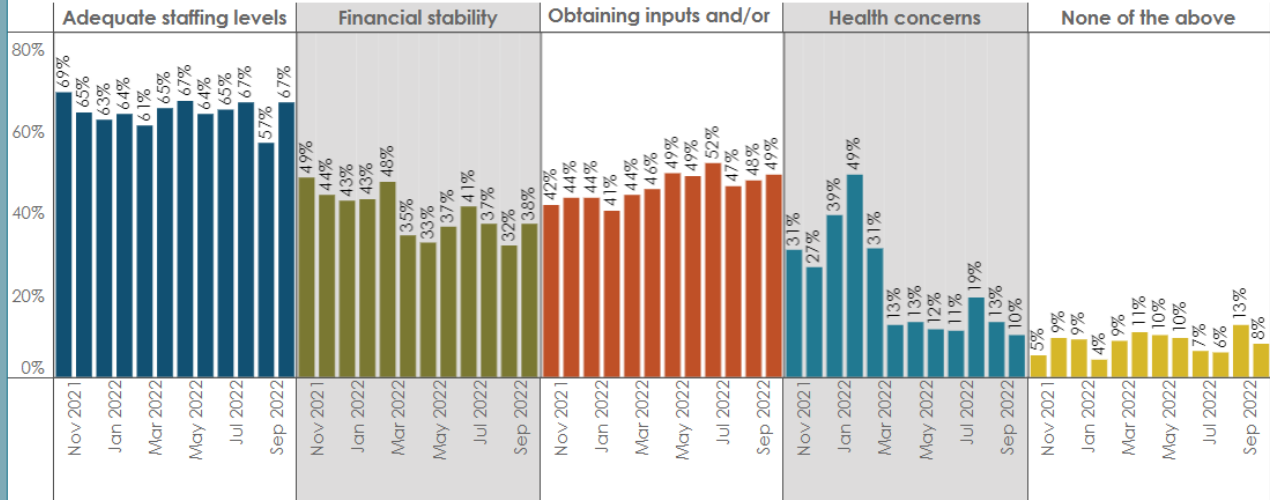
CURRENT STATE OF BUSINESS

From 1 (Poor) to 10 (Excellent), how would you rate the current state of your business?

Monthly Average

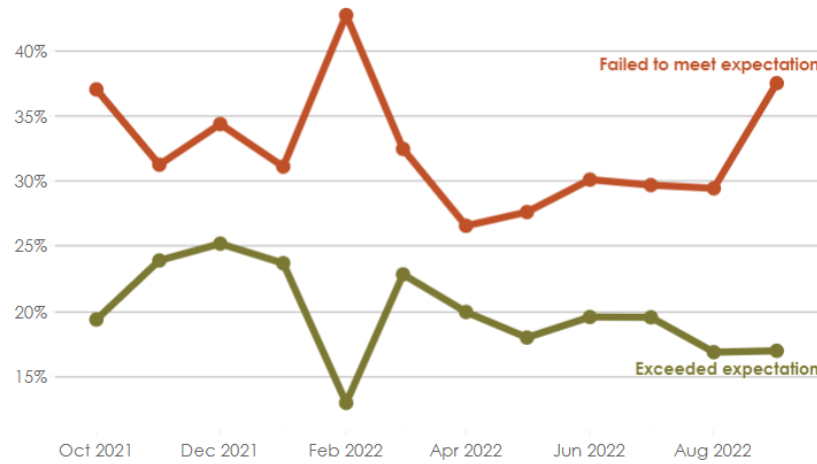
September 2022	6.9
August 2022	7.1
July 2022	7.1
June 2022	7.0
May 2022	6.8
April 2022	7.2
March 2022	7.0
February 2022	6.6
January 2022	6.7
December 2021	6.9
November 2021	7.0
October 2021	6.7

Do you currently have concerns about any of the following aspects of your business? (Check all that apply.)

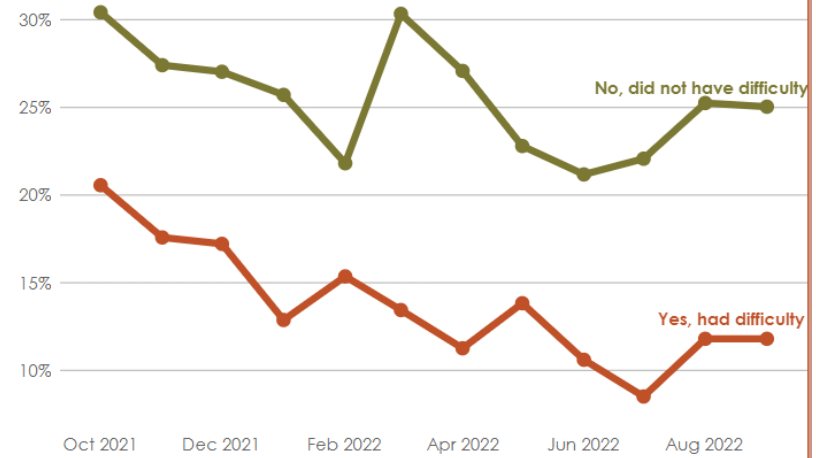


THE PAST MONTH

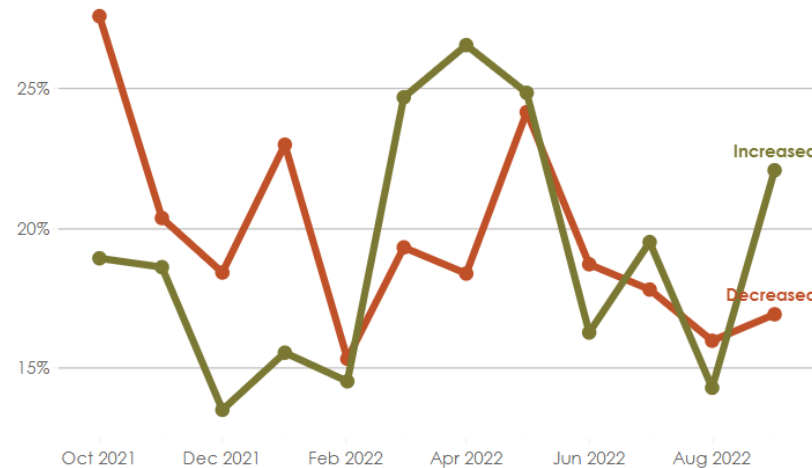
Over the past month, did your revenue exceed or fail to meet your expectation? (met expectation not included)



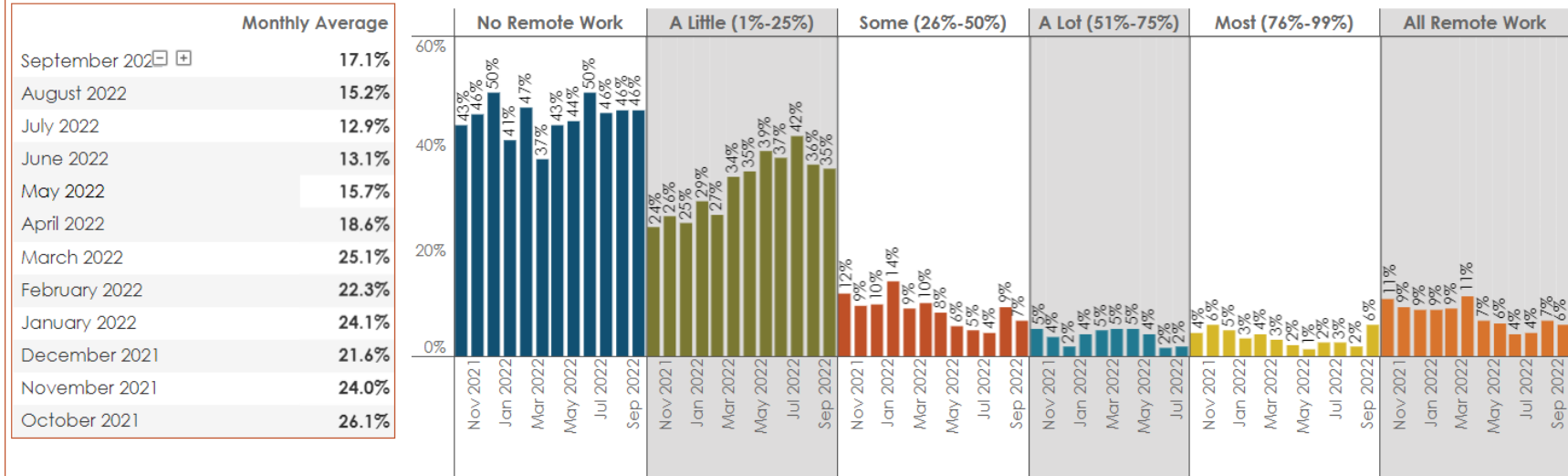
Over the past month, did you have any difficulty accessing capital needed to grow or maintain your business? (did not seek capital not included)



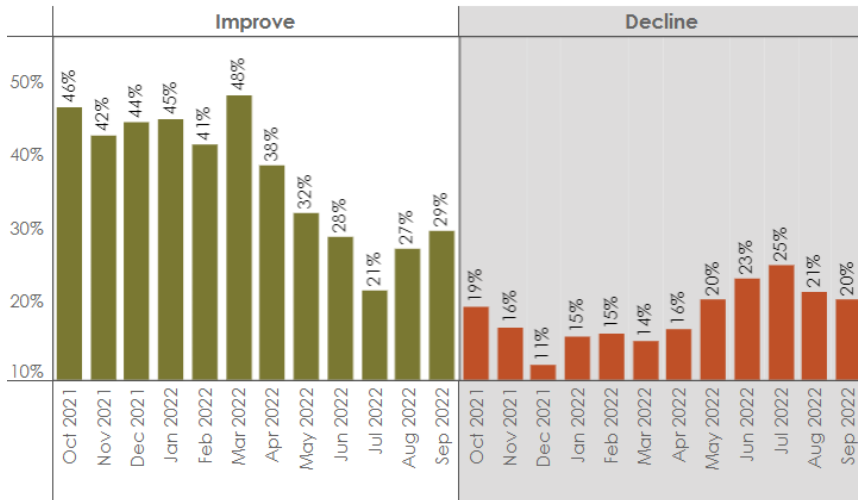
Over the past month, did your overall staffing level increase or decrease? (remain the same not included)



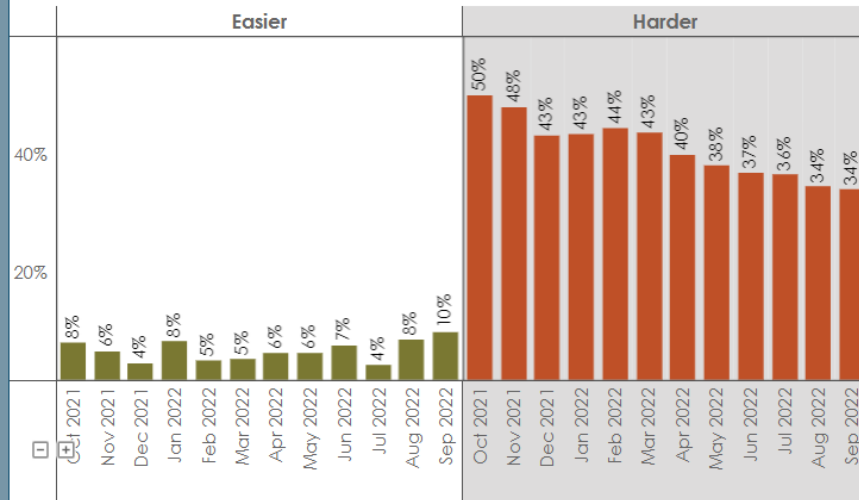
Over the past month, approximately what percentage of your workforce's time was spent working remotely?



Looking forward, do you anticipate business conditions for your company will improve or decline over the next six months? (remain the same not included)



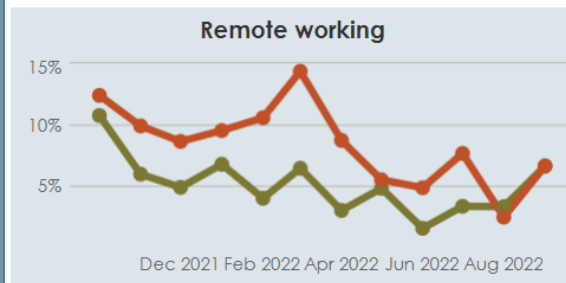
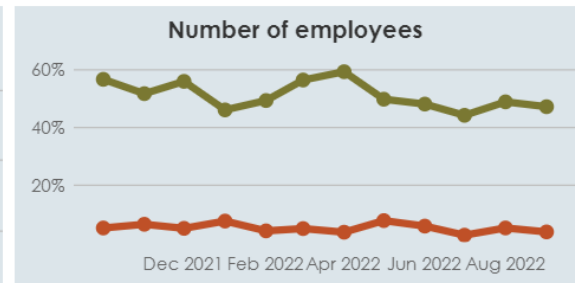
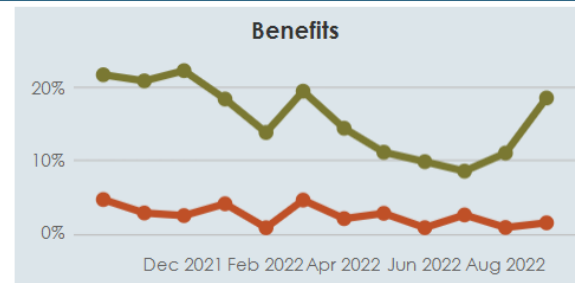
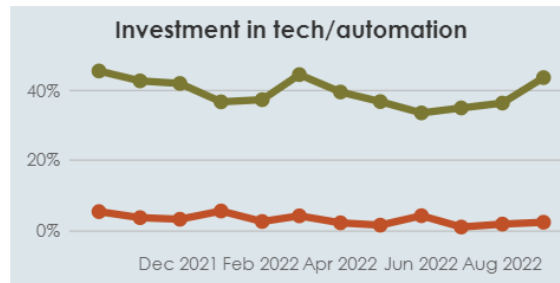
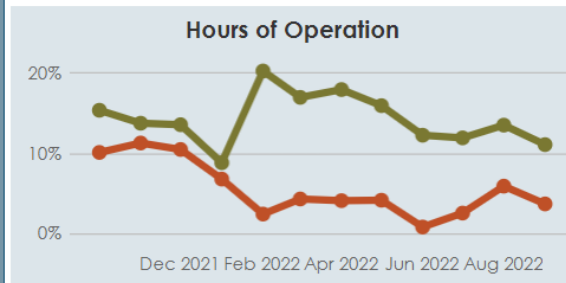
Looking forward, do you believe your ability to find qualified workers will be easier or harder six months from now? (about the same not included)



THE NEXT SIX MONTHS

Looking forward, do you plan to make any of the following changes to your business over the next six months?

■ Increase
■ Decrease



Appendix 4 CEDS Pandemic Response

Southeastern Economic Development Commission Comprehensive Economic Development Strategy COVID-19 Response | Recovery | Resiliency

Prepared by:

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Acknowledgments

WithersRavenel and the Southeastern Economic Development Commission would like to thank all of the individuals and organizations who have participated and contributed to this economic development strategic planning process. Approximately twenty business, government, and regional/state leaders assisted in generating feedback and advice. A special thanks also goes out to the SEDC Executive Committee for serving as the oversight body for this important endeavor.

Executive Summary

Because of the COVID-19 pandemic and the resurgence of the virus through the delta variant, the Southeastern Economic Development Commission is taking action to support communities and governments to improve regional response, resilience, and recovery. As an initial step, the SEDC hired WithersRavenel to update its Comprehensive Economic Development Strategy (CEDS) focused on the COVID-19 pandemic. The SEDC's purpose in taking this path is to continue to improve the quality of life for its citizens by building a robust and healthy economy that is both diversified and sustainable. Approximately twenty business, government, and regional/state leaders assisted in generating feedback and advice. In addition, the SEDC Executive Committee played an important oversight role throughout this update process.

This pandemic response is not a static document, but rather a methodical and interactive strategy guide that will help the SEDC region navigate shocks throughout the next decade. It represents the synthesis of research, conversations, data collected through various in-person and electronic means, and information derived from strategies that have been previously developed by the SEDC and other municipalities and communities in the twelve-county SEDC region. Building on the strong foundation of the existing CEDS, this update adds critical new data and information related to the

pandemic's impacts and opportunities for recovery and resilience. For this project, regional leaders were interviewed and their valuable and insightful comments have been included in this document and form the basis for additional CEDS strategies. Although some new strategies and actions have been added to the existing CEDS goals, this update should be viewed as a supplement and extension of the previously completed work.

Introduction

The Southeastern Economic Development Commission (SEDC), was established in 1968 and designated as an Economic Development District (EDD) by the U. S. Department of Commerce Economic Development Administration (EDA), as authorized under Title IV of the Public Works and Economic Development Act of 1965, to foster and promote economic growth in twelve southeastern North Carolina counties.



Proudly Serving Southeastern NC

Bladen	Harnett	Richmond
Brunswick	Hoke	Robeson
Columbus	New Hanover	Sampson
Cumberland	Pender	Scotland

The SEDC strives to create new jobs, retain existing jobs, and stimulate economic and industrial growth in the region. Because of the financial need for projects such as public facilities and infrastructure, the SEDC assists its member county governments with project development necessary for the solicitation of grant funding from the Economic Development Administration (EDA). By providing economic education and assistance, assembling EDA investment applications, and assisting in overall regional project work, the SEDC continuously enhances the quality of life for all residents of the District. Since 1968, the SEDC has facilitated over \$87.3 million in EDA financial assistance for public infrastructure and planning projects.

As required by the EDA, the SEDC completes a regular Comprehensive Economic Development Strategy (CEDS). Completing the CEDS process maintains the District's eligibility for EDA funding, a major source of infrastructure grants. The CEDS covering the period of 2017-2022 was submitted in September 2017 and a full list of the strategy committee members is included at the end of this addendum in Appendix A.

The impacts of the COVID-19 pandemic on the SEDC twelve-county region are still emerging and being understood, which requires a cohesive response, recovery, and resiliency strategy. To ensure that the twelve-county region can prepare and recover from future impacts, WithersRavenel (WR) was hired to update a disaster recovery and resiliency economic development plan, focused on the COVID-19 pandemic. The content of this addendum incorporates stakeholder input, state, and regional information, analysis of relevant data, and professional observations of SEDC and WR staff. The purpose of this document is to present additional or modified strategies to aid in the region's COVID-19 pandemic response, recovery, and resiliency.

Effects of the COVID-19 Pandemic

According to the UNC School of Government, the pandemic's early initial impacts were significant.⁴³ For instance, the May 2020 unemployment rate in North Carolina was higher than at the height of the 2009 Great Recession, particularly in the retail, tourism, and service industries. A Spring 2020 report by the UNC School of Government's ncIMPACT Initiative included the following information:

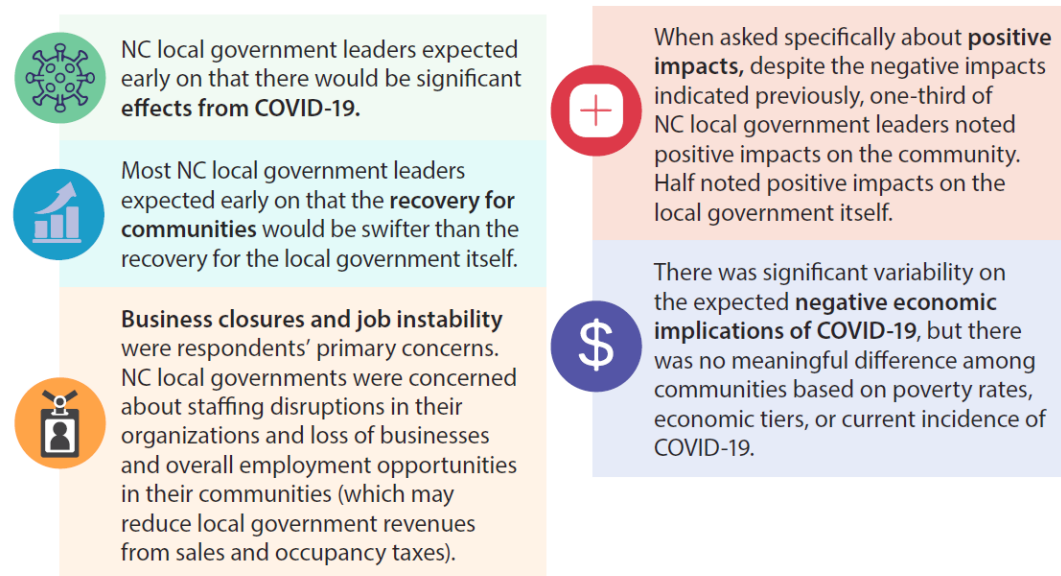


Figure 17 ncIMPACT Initiative Spring Survey 2020 – NC Local Government Early Responses to the Coronavirus Pandemic⁴⁴

Like other areas of the state and country, employment in the SEDC district dropped sharply in March 2020 and recovered throughout 2020 and 2021. These trends are displayed in the following figures, which were compiled from the relevant county and regional workforce development boards ⁴⁵.

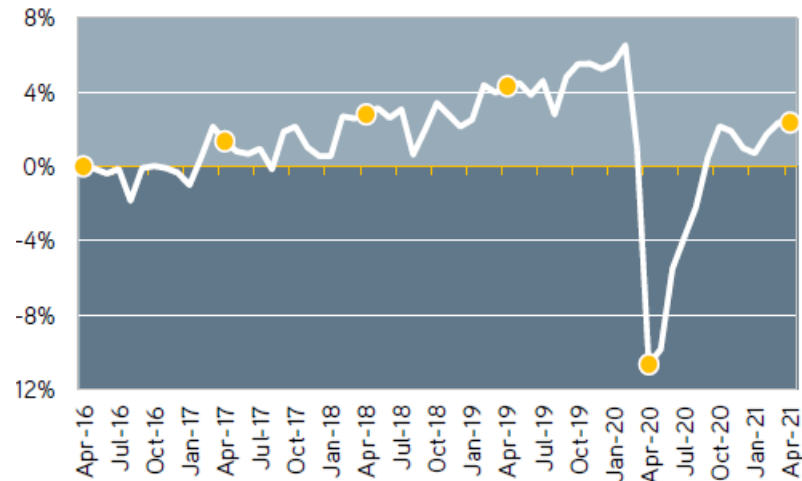


Figure 18 Triangle South WDB region employment (Chatham, Lee, Harnett, and Sampson)

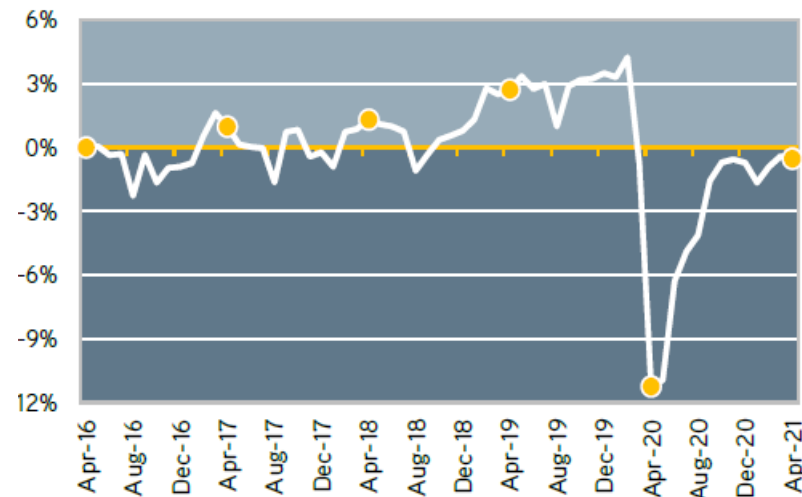


Figure 19 Lumber River WEB region (Richmond, Scotland, Hoke, Robeson, and Bladen)

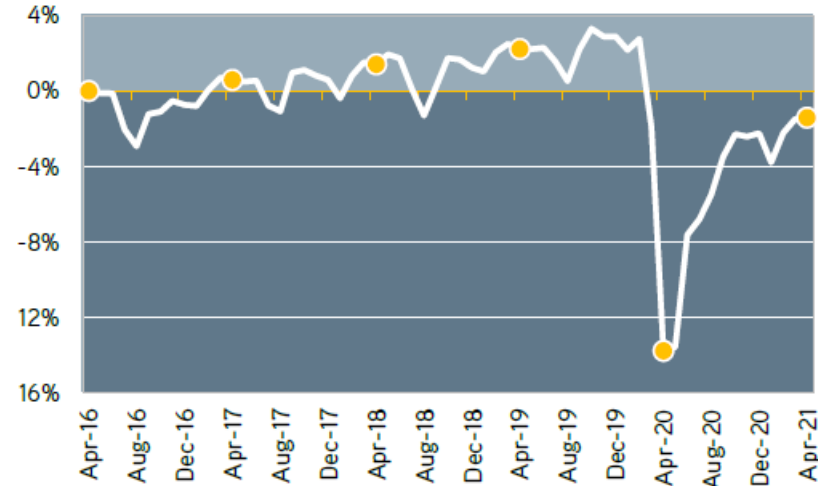


Figure 20 Cumberland County WDB employment

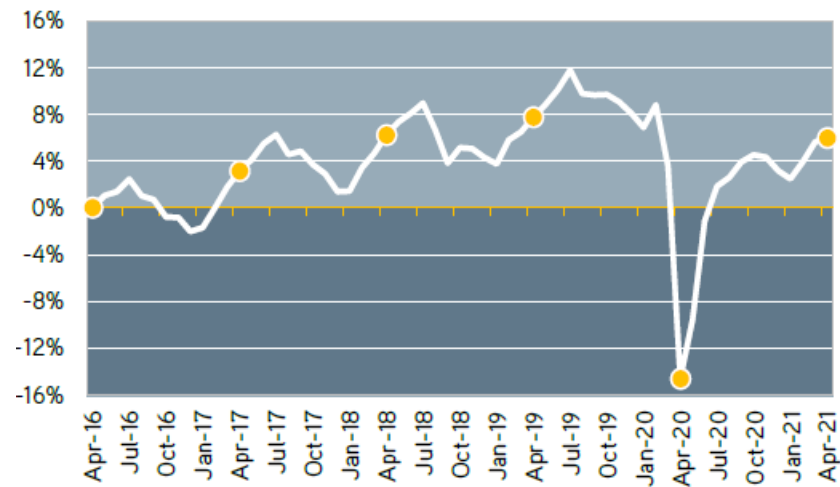


Figure 21 Cape Fear WDB region employment (Columbus, Brunswick, Pender, and New Hanover counties)

Evident from Figures 2-5, employment dropped precipitously in March and April of 2020, but started to recover shortly thereafter, forming a “v-shaped” recovery.

Unemployment varied across the region, with some areas faring better than others. By April 2021, employment in the Triangle South and Cape Fear River workforce development board regions was approaching 2017 levels. However, employment in both Cumberland County and the Lumber River WDB regions was still below April 2016 levels. As of April 2021, The SEDC district had some of the highest unemployment in NC. For instance, Richmond (6.4%), Scotland (8.5%), Robeson (6.5%), and Cumberland (6.2%) exceeded the state and nationwide rates of 5.0% and 6.1% respectively.⁴⁶

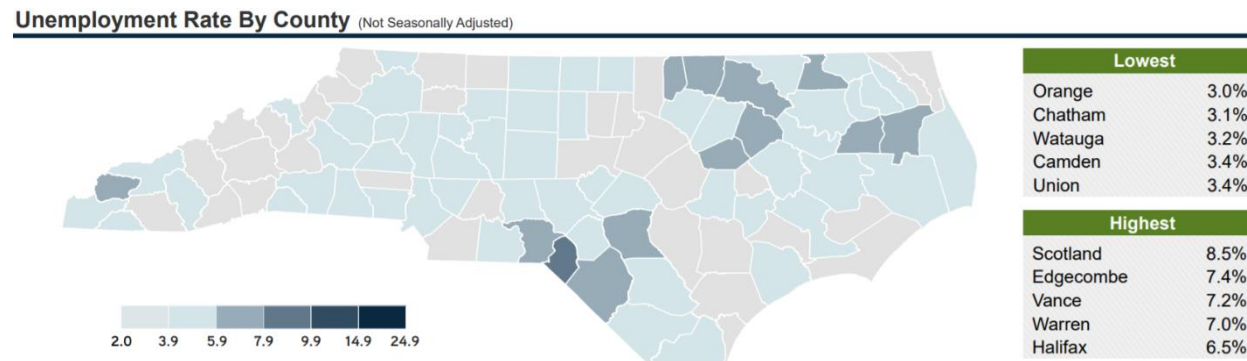
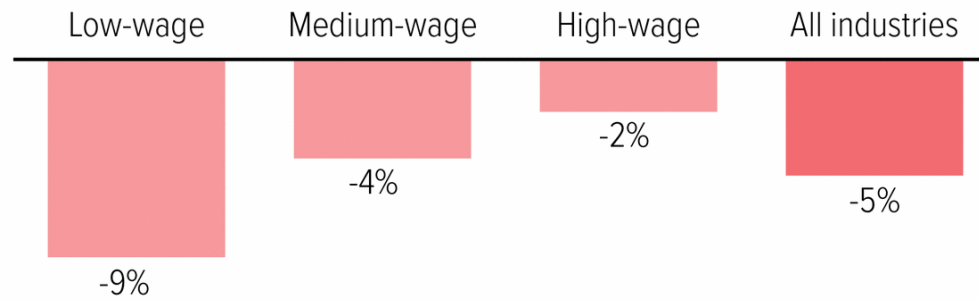


Figure 22 Unemployment rates⁴⁶

Unemployment also varied depending on the industry. According to the Center on Budget and Policy Priorities, low-wage industries nationwide lost the most jobs in 2020.⁴⁷ As of November 2020, data indicated that the hospitality industry was impacted more than most sectors.⁴⁸ This is demonstrated in Figures 8-9, which show non-farm employment change vs one year earlier for the Fayetteville and Wilmington metropolitan statistical areas (MSAs) from 2020 to 2021. These MSAs represent the largest urban areas in the SEDC district. In each figure, employment is disaggregated by industry. In both MSAs, the Leisure and Hospitality sector, which often includes businesses that pay the lowest wages, was initially impacted but was able to regain employment by April 2021. Conversely, the Trade, Transportation, and Utilities sectors, which often pay higher wages, increased employment over the entire period.

Job Losses Largest in Low-Wage Industries

Percent change in number of jobs, February 2020 to April 2021



Note: Industries were ranked by average wages in February and divided into three groups containing roughly the same number of jobs.

Source: CBPP calculations of Bureau of Labor Statistics data

CENTER ON BUDGET AND POLICY PRIORITIES | CBPP.ORG

Figure 23 Job losses by industry wage

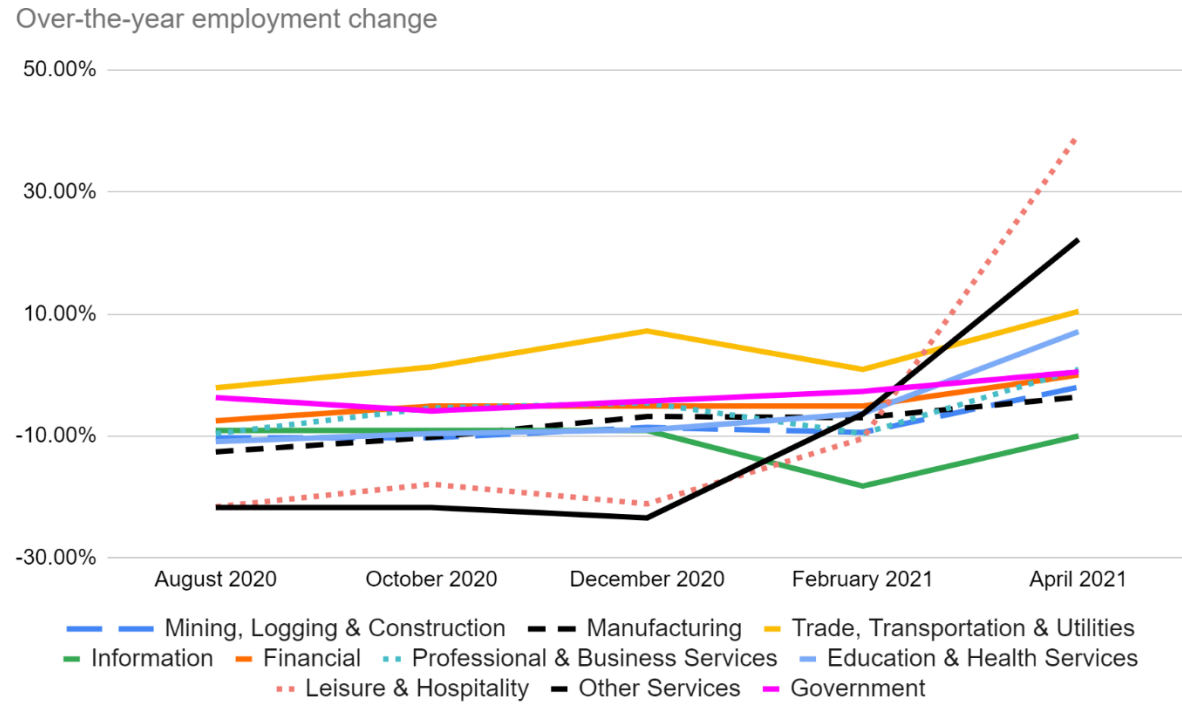


Figure 24 Over-the-year employment change – Fayetteville Metropolitan Statistical Area

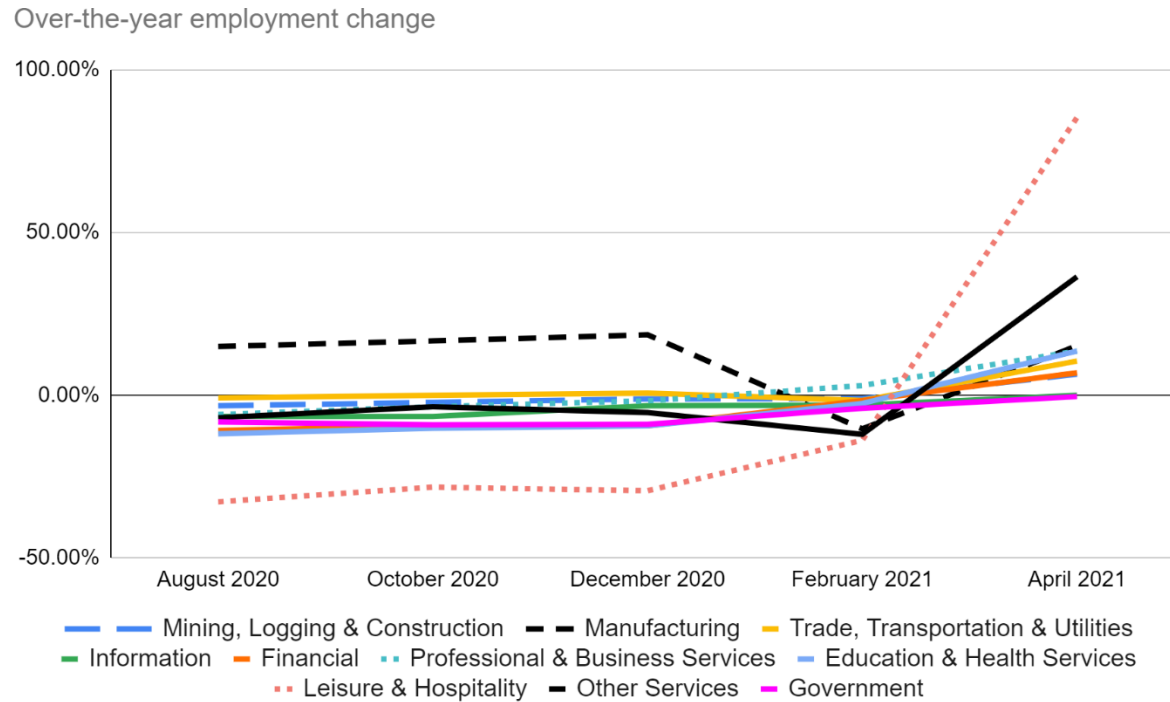


Figure 25 Over-the-year employment change – Wilmington Metropolitan Statistical Area

A Fall 2020 follow-up statewide survey (353 respondents) by the UNC School of Government's ncIMPACT Initiative found the following changes compared to a similar Spring 2020 report:



Top three **NEGATIVE COMMUNITY IMPACTS**, the percentage of respondents citing:

Employment instability decreased by 16 percentage points.

Housing instability increased by 13 percentage points.

Food insecurity decreased by 13 percentage points.

Travel restrictions decreased by 10 percentage points.



The total percent of respondents believing that **COVID-19 HAS HAD SOME POSITIVE IMPACTS ON THEIR COMMUNITY** slightly increased to 37%. The themes among positive impacts included:

- Community unity
- Tourism and occupied rental properties
- Service transitions and changes to operations that may be long-lasting
- Societal shifts such as the recognition of underlying issues like broadband access



For **IMPACT ON LOCAL ECONOMY, LOCAL WORKFORCE, AND LOCAL GOVERNMENT REVENUE**, respondents appear to be **MUCH MORE OPTIMISTIC** now about potential impacts over the next 90 days.



Top three **NEGATIVE LOCAL GOVERNMENT IMPACTS**, the percentage of respondents citing:

Reduced revenue decreased by 39 percentage points.

Staffing absences due to COVID-19 exposure or potential exposure increased by 37 percentage points.

Staff burnout due to COVID-19 increased by 23 percentage points.



When asked if **COVID-19 HAD any POSITIVE IMPACTS ON THE LOCAL GOVERNMENT**, 203 of the 353 survey respondents (58%) indicated there was some positive impact. Their responses formed several major themes, including:

- The benefits of remote work
- Changes to service delivery
- Hard work and resilience
- Improved revenues
- The opportunity for change
- Improvements to emergency preparedness



When looking at jurisdiction type, **COUNTY GOVERNMENT RESPONDENTS** were **37.25 PERCENTAGE POINTS LOWER** in citing reduced revenue versus municipal government respondents.



The only area in which our fall survey indicates **NO CHANGE IN OUTLOOK** is on **IMPACT TO LOCAL GOVERNMENT STAFFING** over the next 90 days.

Figure 26 Summary of some of the most important findings and insights Fall 2020 vs Spring 2020 ⁴⁹

Though survey respondents believed that the pandemic had positive impacts in many cases, the recovery has been uneven. Not only did the pandemic unevenly affect the SEDC district geographically and by industry sector, but its impacts also varied demographically. According to work done by the NCImpact Initiative, many parents and caregivers left the workforce to care for children and elderly relatives. ⁵⁰ Because many schools were closed and remote learning was instituted, many workers had to leave employment to manage their children's education. As of January 2021, the following statewide trends were reported ⁵¹:

- Black women bore the brunt of the initial spike in unemployment, from which they have mostly recovered.
- White women were more likely to leave the labor force entirely in the early stages, a trend that has only partially reversed.
- Black men experienced a dramatic decrease in total employment during the second half of 2020, which was caused by both increased unemployment and increased non-participation in the labor force.

In addition, the district had not fully recovered from the impacts of the Great Recession with unemployment rates consistently above the state average. During the pandemic, low-income households lost income at greater rates than wealthier households, which created widespread effects that are not yet fully realized.

The pandemic has had dramatic effects on the economy, specifically impacting supply chains and labor which are tied to inflation and rising consumer prices. The pandemic shut down many industries like retail, accommodations, food-service, and manufacturing in 2020. But demand for a variety of products like electronics, food, automobiles, and houses greatly exceeded expectations. Industries reacted to increasing consumer demand by hiring workers. Job advertisements greatly accelerated in 2021, which can be seen in the following figures.

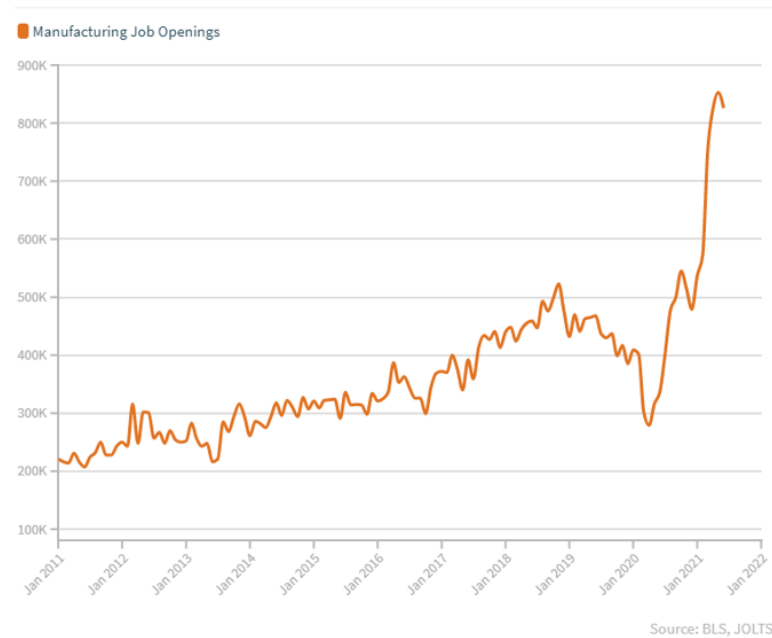


Figure 27 Manufacturing Job Openings ⁵²

In 2021, manufacturing job openings increased over 100% from the 2018-2020 period and tripled versus the 2020 recession.

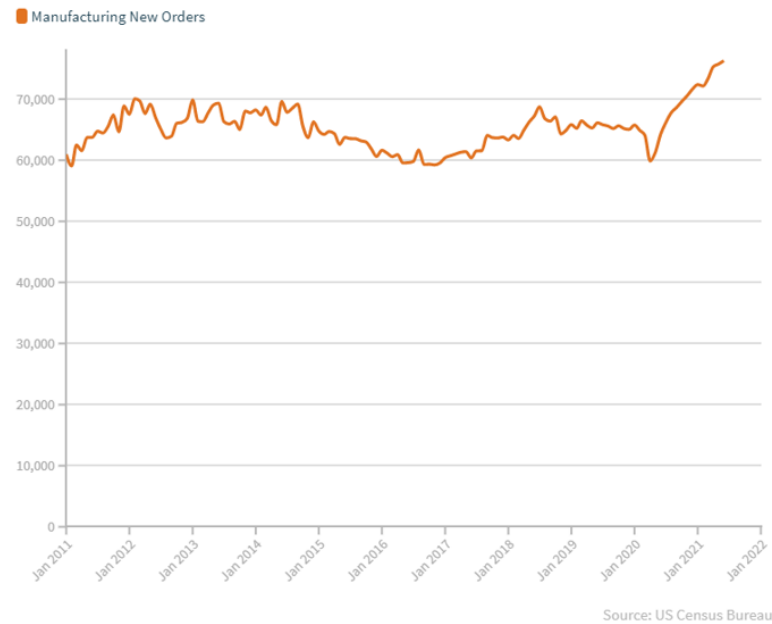


Figure 28 Manufacturing New Orders ⁵²

As seen in the figure for new manufacturing orders, orders dropped during the 2020 recession. But after federal interventions supplied cash to businesses and individuals, pent-up demand drove increased spending which caused a sharp spike in manufacturing orders. Other industries are attempting to find more workers. For instance, trucking, warehousing, and utilities and accommodation and food service job openings have rapidly increased.

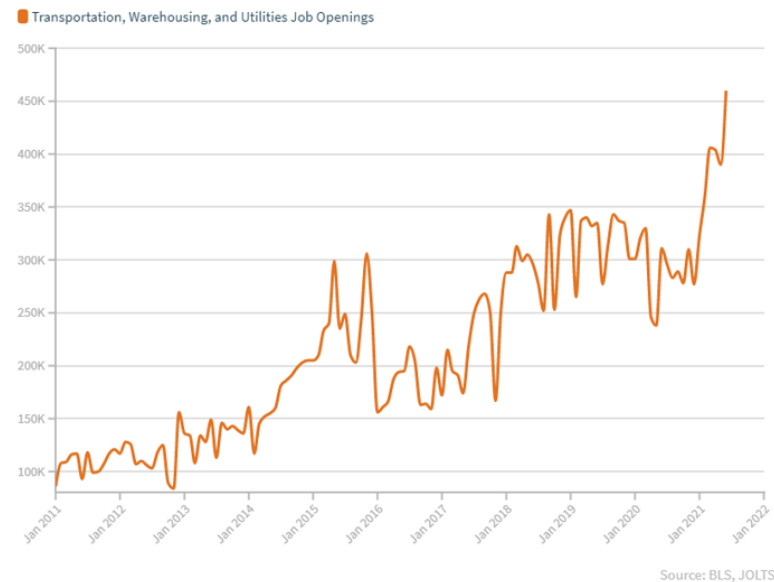


Figure 29 Trucking, Warehousing, and Utilities Job Openings ⁵²

Though industries are trying to hire workers and even increasing wages, the labor force has not responded.

Labor shortages are regarded as one of the main reasons for current supply chain bottlenecks, rising inflation, and a rockier path to economic recovery. Many of those who lost employment have not re-entered the workforce and have relied on unemployment insurance or used the opportunity to upskill or find a different career.⁵³ Tom Barkin of the Federal Reserve Bank of Richmond recently stated that our labor challenges have various reasons. "Part is a drop in participation, particularly from parents with elevated care responsibilities and from three times the normal level of retirements. ...

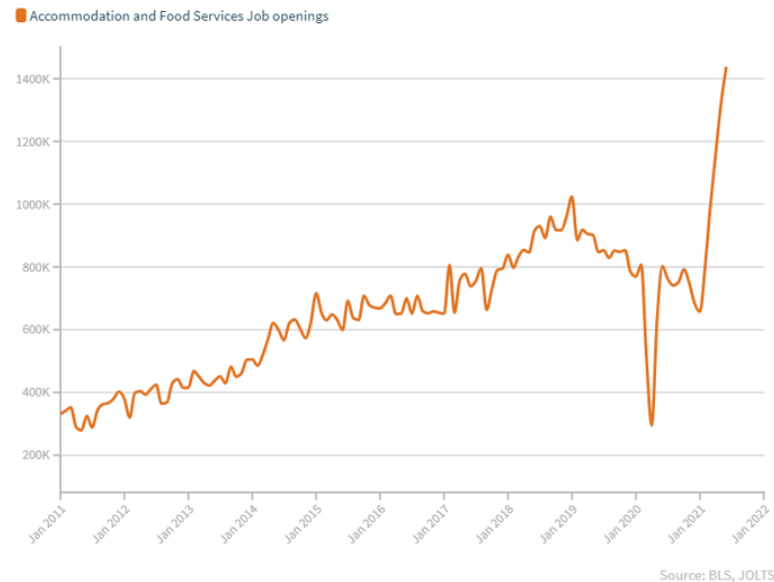


Figure 30 Accommodations and Food Service Job Openings ⁵²

Perhaps additional stimulus payments and reduced spending are giving workers the financial wherewithal to be selective — on pay, industry, working conditions or health risks.” After COVID cases started to subside in March 2021, many of those employers suddenly were trying to rehire people they laid off previously. Unfortunately, those workers “had moved on, some to Amazon distribution centers and Walmart distribution centers, which are opening up,” Barkin said. “People went back to school and retrained in technology and other places.”

Labor shortages and the abrupt shutdown in spring/summer 2020 raised material prices, disrupted supply chains, and extended wait times. These factors have led many to expect rising inflation. Because there are not enough workers to handle increasing imports and exports, freight is piling up at America’s ports, which increases storage and inventory costs for companies. These costs are passed on to consumers. A recent report stated that “manufacturers reeling from shortages of key components and higher raw material and energy costs are being forced into bidding wars to get space on vessels, pushing freight rates to records and prompting some exporters to raise prices or simply cancel shipments altogether.” ⁵⁴ In addition, the cost of sending freight from China to Los Angeles is six times higher than in May 2020. Freight is heavily impacted by the trucking industry, which is responsible for moving 72% of the US’s freight tonnage. Unfortunately, “the truck driving profession has been battling a shortage of its own for years in the U.S., with the industry currently experiencing a shortfall of an estimated 61,000 drivers, according to the American Trucking Association.” ⁵⁵

Labor shortages have impacted other industries too, driving up the prices of building materials, aluminum, food, and computer chips. After the 2009 recession, 40,000 workers left the construction industry.⁵⁶ Ron Hilgart, principal at HilgartWilson Construction said that “not only did people leave, but for about five years we weren’t hiring either. That means people weren’t getting trained. After the recovery, there’s been a big gap in the workforce of people with five to seven years of experience. It’s not going to get better anytime soon either, in part because baby boomers are retiring.”. In many areas of the country, the lack of supply has not kept up with exploding demand. Building costs have skyrocketed and project timelines have been severely exacerbated.

Stakeholder Interviews in the Southeastern Economic Development Commission District

The Kenan Institute identified seven forces that are currently reshaping the U.S. economy in the wake of the COVID-19 pandemic, all of which ultimately impact the economy within the 12-county region.⁵⁷

1. Changes in work, travel, and migration patterns
2. Accelerating shifts toward on-demand and at-home retail
3. On-shoring and widening of supply chains
4. Renewed focus on diversity and dismantling systemic racism
5. Upending of education and childcare
6. Shocks to health care and pharmaceutical demand
7. Risk reassessment by capital providers

WithersRavenel staff felt that it was important to understand how these seven forces manifested locally across the SEDC district. We also wondered what other trends might be specific to the SEDC district. To that end, over fifty SEDC district stakeholders were contacted to discuss COVID-19 impacts and their recovery progress during 2021. Nineteen regional leaders representing education, community and economic development, and government organizations responded and were interviewed virtually or via phone. The dictated comments were transcribed and left unedited as much as possible. Interviewees are listed in Appendix B. A representative summary of responses can be found in the following tables. The following questions were discussed:

- What is your organization’s mission or goals and how does your organization implement those?
- How did the COVID pandemic impact your organization or the region?
- What resilience lessons did your organization learn from experiencing the pandemic?
- Is your organization recovering and how?

- What adaptations did you make, and will those adaptations remain part of your standard operations going forward?
- What does your organization plan to do in the future to navigate a similar shock, opportunity, or challenge?
- What resources does your organization need to ensure that your organization is resilient and able to navigate a future shock, opportunity, or challenge?

A variety of leaders representing diverse organizations were interviewed. Organizational missions were unique but in general, they prioritized community and economic development, small business support, education, and improving citizens' lives in the SEDC district.

When asked how COVID-19 impacted their organizations or the SEDC district in general, respondents noted that organizations had to pivot quickly to a virtual environment. This was a significant hardship because some people were limited by a lack of childcare, broadband, or their jobs could not be accomplished remotely. The idea of an “essential worker” was questioned. Several respondents mentioned that essential workers should be expanded to include food processing workers since they were required on-site. They noted that many office workers could work remotely. Several interviewees believed that the pandemic had greater negative impacts on women and people of color. Communities that lacked broadband were at a severe disadvantage which affected their access to healthcare, education, and remote work options. Several respondents appreciated the federal and state responses but noted that new programs and their requirements created confusion and complexity too. Support organizations had to communicate and collaborate quickly to ensure that communities had expertise and resources. These collaborations are still developing. Additional responses can be found in the following table.

How did the COVID pandemic impact your organization or the region?

a lot of women were impacted most, especially people of color

not building a personal relationship, not touring facilities, makes it hard to develop relationships

can still accomplish 90% of what clients need but save 2.5 hours of one-way driving
videoconferencing is great

in-person meetings case-by-case, some companies don't allow visitors

lost 70% of revenues

most companies had to deal with staffing and customer issues

seeing a ramp-up of activity in trying to answer the pandemic

the government's response came with a lot of funding, but we have limited capacity,

money is not everything, we need to have compliance, we need to understand the highest/best use of funds, there is an eroding capacity in government despite dedication, we can't respond quickly

manufacturing plants like food processing/chicken highlighted the essential worker, the office worker is not as essential as we thought

some programs created conflict - programs helped businesses but businesses applied and did not understand what they were getting (can't expand operations or refinance another loan)

low availability of childcare

tradeshows - face-to-face selling model - how do you do that virtually?

workers scared to come to work, industries struggled to get personal protective equipment (PPE), one person acquired covid and wiped out a whole assembly line, had to isolate

supply chain distribution - if you couldn't get raw material (China and South Korea shutdown) that negatively impacted your business success

workforce out because unemployment benefits are so good, so how do we support businesses?

local sales tax revenues increased because people stayed and shopped locally

housing market blew up - very few houses available, the community will do property tax re-evaluation in two years and expects a big jump in revenues

we were already accustomed to providing online instruction and teleworking so we were in good shape

big negative impact on research faculty and research operations initially

reduced enrollment, a big decline in summer, fall, less so in spring, big drop in dual-enrollment

unemployment support is reducing the incentive to enroll in programs

a lot of unfilled jobs now – how do we get folks back to work?

real estate prices skyrocketed, booming land business, many developers are not listing any houses until they are complete because construction costs and delays are creating uncertainty

peoples' confidence is the real victim

When asked about “lessons learned”, respondents noted that organizations were still recovering from the impacts of recent hurricanes. Many communities already had a “resilience” mindset but COVID-19 was an additional hardship. People were able to adapt quickly to remote work as their jobs permitted. The pandemic revealed how interdependent people and organizations are and there is a renewed emphasis on collaboration and engaging diverse voices. The pandemic’s impacts and communities’ recoveries were uneven. For example, organizations that were well-networked pre-pandemic were able to recover more rapidly than those that were not. The pandemic revealed that the “just in time” business strategy may have to be replaced since businesses struggled with their supply chains and often lacked sufficient inventory. Additional responses can be found in the following table.

What resilience lessons did your organization learn from experiencing the pandemic?

When we reached out to communities in April and May rural planners checked in, several communities were still recovering from hurricanes

people show they are capable of remote work

exposed weaknesses and lack of interconnectedness, silos, divided by geographies

people are more aware of how personal actions affect others. the pandemic exacerbated issues creating a more noticeable divide among people

there are different types of economies and counties – some better prepared than others, eg having poor internet impacts your resilience

the longer you leave folks at home the harder it is to bring them back

the power of collegiality and collaboration can't be overestimated - in rural NC you don't have the conveniences as urban areas and work-from-home is not as effective

more listening and less telling

now local civic groups are more interested in being inclusive

the importance of planning, continuity planning, succession planning,

businesses and communities that are well networked are successful in getting funding – need to build relationships ahead of time

major shifts in distribution – “just in time” left businesses without any inventory, now they are purchasing bulk inventory and storing it, “don't forget you need inventory”

shortening the supply chain

interconnectedness and interdependence – we all depend on each other

communities are more attentive to emergency preparedness now than in the past,

people acutely aware of what you need in an emergency, contacts, and supplies
 the major point is "be prepared!" - have had a share of hurricanes and other things hit
 more of a focus on long-term planning and infrastructure

When asked about how organizations were recovering, respondents noted that virtual collaboration tools were rapidly adopted and will be standard practice going forward. Virtual and augmented reality is being used increasingly in the real estate, economic development, and healthcare industries, and adoption of those new tools for other industries is anticipated. Several respondents believed that their organizations have improved the frequency and scope of their communication, citing better information sharing as an important part of their recoveries. Lastly, communities expected reductions in revenue, but some have realized higher sales and property taxes as a result of increased local goods purchased and a strong real estate market. Additional responses can be found in the following table.

Is your organization recovering and how?

changed focus from recruiting to helping existing businesses

able to rely on hurricane experience with "all-hazards plan"

technology - the steep learning curve and it's evolving but slowly getting there,
 learned to pivot well, learning how to engage clients effectively

Biggest concern last year - what would happen to the state's economy because of covid? But NC is having a great year with new businesses, expansion, jobs being created, etc

Workforce still a challenge, different reasons now (unemployment support and relief packages)

Unemployment insurance is needed, people are hurting, who knows where the economy would be without it, but now unemployment support is incentivizing folks to stay home

Companies are starting to re-shore and tighten supply chains

Existing businesses are starting to pivot - technology that provides virtual collaboration is filling the gap

We got new tools – virtual can be better - can review files and content remotely – but still a lot better to work in-person

the expansion is not adding headcount, but adding more responsibilities to existing

employees and bringing in new tech and automation to complement people
we did a lot of virtual home tours
augmented reality, virtual reality, are playing a much bigger role now and will continue
communication is essential but tough – the key challenge is getting federal and state information out to businesses

When asked about what adaptations organizations made, respondents noted that they spent more time checking on employees and colleagues and offering counseling and other support services. They became more understanding with remote work requests, especially for childcare-related accommodations. Most noted that PPE and safety protocols will remain in place indefinitely. A few respondents mentioned that some community organizations, like churches, have become one-stop locations for various services like food distribution, filling out unemployment insurance and PPP forms, and connecting individuals to additional services. Others noted that organizations must continue to advocate for more resources to ensure an equitable recovery, especially for underrepresented communities. Additional responses can be found in the following table.

What adaptations did you make, and will those adaptations remain part of your standard operations going forward?

we learned to be family-friendly, to be able to check on employees and ask if they are ok, and have counselors available to help people
we must build and maintain trust, be honest, upfront, empower employees with strength
Need websites to attract covid migrants, more focus on that
Protocols to keep safe
people used to go multiple places for services but now, organizations like churches became one-stop centers for food distribution and other social services – “organizations have become like hubs”
smart organizations will keep ppe inventory ready - smart companies will pay attention to cleaning
we’re in the middle of website redesign and setting it up so that it’s valuable during a crisis
convincing the legislature that we’re in a generational crisis! we are facing a 3-4 yr period with graduating seniors who will just have a 7-8 grade education because

COVID-19 has hurt learning for years

When asked about what organizations plan to do in the future to navigate a similar shock, opportunity, or challenge, stakeholders stressed that at some point NC and the Nation will need to review the effectiveness of pandemic-related actions and policies. Most agreed that NC and the Federal government reacted well to an uncertain and novel challenge, particularly with financially supporting individuals and businesses. Some believe that the district will be better prepared for the next threat, but several interviewees think that more work is needed. They suggest investing in leadership programs, building community networks, helping people to advocate for themselves, and taking a regional approach to economic and community development. Additional responses can be found in the following table.

What does your organization plan to do in the future to navigate a similar shock, opportunity, or challenge?

the external goal is to create a company database with every business registered and information about their products, services, and needs

- this would have been helpful with companies making PPE, to map out the supply chain and bring companies together
 - or when DHHS and hospitals were looking to buy PPE they could use that database
- we need regional approaches to economic development, jobs, civic engagement – counties can not work in isolation

people need to be more involved, “the next pandemic, nobody is going to rescue us”, “keep networking, keep leveraging what we do,” “there were a lot of resources after the fact that we did not get”, people need to join state boards or statewide advocacy to bring attention to the area, decision-makers need to know the area, “we need to create authentic youth leaders-not just bring them out to sound good to get a grant, this needs to be a natural organic way of operating”

region’s leaders and stakeholders need to convene regularly to share what they are doing and build relationships

attracting and retaining workers is a priority - Walmart distribution has a basketball court inside and employees can earn 15 minutes of massage time. There’s a culture change in plants, many employers are flirting with flex shift, incentivizing workers with food and cookouts, and social gatherings

need more development and planning around rail- seeing more rail projects than ever

before, roughly 25% of project activity year-to-date has a rail component. This is a trend that will continue since it is hard to hire truck drivers.

our organization plans to create a contingency fund for 3-4 months - will be doing a capital campaign focusing on renovation, building efficiency, and endowments

we hope that there will be more focus on looking at supply chains and developing alternative sources (especially small companies that have roughly 50 employees)

data security - everything farmed out with call centers/databases in India and China where US law has no authority

work on communication - got to come up with a solution

"back up our system!" redundancy is important

if a region depended on one industry they got hit! diversification is important

When asked about what resources organizations need, some stakeholders noted that people are thinking about this question for the first time. They are still considering what other changes need to occur to maintain business continuity and how to adapt and anticipate new challenges. Some stakeholders seem very positive about their preparation whereas others are still trying to figure out the next steps. This makes sense because the COVID-19 pandemic was unprecedented. Federal and state aid is still being deployed and organizations and communities are still evaluating how to invest current resources while they anticipate the additional aid. In general, stakeholders believed that diversifying suppliers, products, services, and maintaining flexibility will be crucial to their preparedness, resiliency, and ability to withstand a future shock. Additional responses can be found in the following table.

What resources does your organization need to ensure your organization is resilient and able to navigate a future shock, opportunity, or challenge?

we're set up for remote work now, we won't have a hiccup transitioning to remote if needed

we will need more broadband access going forward to facilitate remote work

we need partnerships and collaboration with other similar organizations to share and navigate community needs and to respond cooperatively

we can operate productively despite being remote, but what are the implications for corporate culture and commercial real estate?

Rapid recovery loans worked well and were put together fast – the legislature and the Department of Commerce reacted quickly and safely to challenges

eastern NC is losing population, so each job announcement strains the region in providing an appropriate workforce

we are better poised to recover, we have already recovered, biggest challenge is to convince people to get their degree and finish. we help companies to get employees

We don't need all things all at once but we need to know who to ask

CEDS Strategies Update

To adequately and strategically respond to the economic shifts resulting from the COVID-19 pandemic and to prepare for future impacts, a coordinated regional response is warranted. In the current SEDC CEDS, five goals are identified:

1. Build on the region's competitive advantages and leverage the marketplace
2. Establish and maintain a robust regional infrastructure, including affordable, adequate housing
3. Create Revitalized and Vibrant Communities
4. Develop a healthy, skilled, and vibrant workforce
5. Encourage entrepreneurs and small business growth, support existing businesses and attract new employers in the region.

Each of these goals is listed in the sections below, along with a relevant example perspective, and corresponding recommendations that will aid the SEDC district's COVID-19 response, recovery, and resiliency efforts. It is understood that the SEDC has only one full-time staff and is not expected to be the sole or primary agent implementing the strategies that follow. However, where and when possible, the SEDC can support regional councils of government (COGs) and other partners to accomplish these goals. With that in mind, a likely partner is suggested for each strategy.

Goal (1) Build on the region's competitive advantages and leverage the marketplace

Perspective: NC's Southeast is the leading economic development partner organization in the SEDC district. According to the NC's Southeast Competitive Positioning 2020 report, "we came into 2020 facing trends like urbanization, slowing globalization, and disruptive technological transformation. The Covid-19 pandemic has accelerated many trends and created new opportunities for industry reshoring and talent relocation. The future of value-added agriculture, the defense sector, health care, foreign direct investment, and outdoor recreation is in transition and will have a profound impact on the region's economy." ⁵⁸

Actions

Partner

Continue to work with regional councils of government (COGs) and partners to identify grant-eligible economic development projects to help ensure that the region takes full advantage of available funding opportunities.	COGs
Support the region's economic development professionals to determine additional database or data management needs, focused on determining what SEDC can provide to benefit economic development analyses across the region.	County and regional economic developers
Convene at least one workshop for regional stakeholders with a focus on business response/recovery/resiliency needs and resources	COGs, workforce development professionals
Collaborate with other economic development organizations that are focused on COVID-19 response, recovery, or resiliency throughout the region to enhance regional programs, goals, or metrics.	County and regional economic developers

Goal (2) Establish and maintain a robust regional infrastructure, including affordable, adequate housing

Perspective: The recent American Rescue Plan Act of 2021 targets infrastructure funding. "Sections 602(c)(1)(C) and 603(c)(1)(C) of the Act provide recipients with broad latitude to use the Fiscal Recovery Funds for the provision of government services. Government services can include, but are not limited to, maintenance or pay-go funded building of infrastructure, including roads; modernization of cybersecurity, including hardware, software, and protection of critical infrastructure; health services; environmental remediation; school or educational services; and the provision of police, fire, and other public safety services." ⁵⁹

Actions	Partner
Support regional efforts for improved rural public transit systems to provide everyone in the region with essential, affordable, and reliable transportation options.	COGs
Support the appropriate planning organizations to promote and guide and attract multi-modal federal and state transportation investments throughout the region.	COGs
Convene at least one workshop for regional infrastructure stakeholders on water and/or wastewater system financing that considers the unique impacts and financing challenges brought on by the COVID-19 pandemic.	COGs

Collaborate with stakeholders to identify funding sources that address local government water, wastewater, and stormwater infrastructure needs with a focus on projects that promote economic expansion and improve community resiliency and system viability.	COGs
Continue supporting broadband connectivity throughout the region.	COGs
Support stakeholders in creating and adopting Capital Improvement Plans and Asset Management Plans to guide ongoing infrastructure investments.	COGs
Collaborate with stakeholders to identify funding for affordable housing development or existing housing rehabilitation.	COGs

Goal (3) Create Revitalized and Vibrant Communities

Perspective: As an example of community revitalization, the Brookings Institution sums up a case study, writing, “as we recover and rebuild from the COVID-19 pandemic, we are presented with an urgent imperative: Rebuild better by centering disconnected and disenfranchised communities and instigating holistic, systemic change. Supporting community-led civic structures is one vital component of this strategy, and it requires unlocking the potential of connected communities to do so.”⁶⁰

Actions	Partner
Determine ways to partner with the NC Department of Commerce’s Main Street & Rural Planning Division to facilitate implementation of the Community Economic Recovery and Resiliency Initiative (CERRI) in the SEDC region, which is developed with a deliberate focus on COVID-19 response, recovery, and resiliency.	COGs
Support the recovery resiliency of the region’s community support services sector including their systems and programs in place which help to address the disproportionate impact of COVID-19 on historically marginalized populations. Some targets include senior services, childcare, food supplement, health, housing, and utility support sectors.	COGs, nonprofit organizations
Where and when appropriate, support the SEDC district in implementing COVID-19-related operational changes including remote public meeting formats, social distancing in public spaces, and use of personal protective equipment, to help foster safety.	All partner organizations
Collaborate with the state and region’s local food system stakeholders to strengthen and grow access to local, healthy foods, especially for those most vulnerable and underserved residents.	COGs, nonprofit organizations
Promote new fiscal models supporting sustainable and environmentally-friendly agricultural practices to enhance the resiliency of the region’s critical agricultural sector.	COGs, nonprofit organizations

Identify and foster private and non-profit partnership opportunities to support the region's COVID-19 preparation, response, recovery, and resiliency efforts, acknowledging the need for additional leadership capacity within the region's non-profit network to help build and sustain a healthy and productive region.	COGs, NC Rural Center
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Goal (4) Develop a healthy, skilled, and vibrant workforce

Perspective: According to a recent McKinsey & Company podcast, “accelerating trends in remote work, e-commerce, and automation means that more people will need to change jobs and learn new skills.” ⁶¹

Actions	Partner
Collaborate with the region's community colleges to determine SEDC's and stakeholders' roles in expanding or enhancing entrepreneurial programming and ecosystem-building efforts.	Regional community colleges
Support emerging health entrepreneurship and innovative public health measures in the region.	COGs, healthcare organizations
Encourage resource-providing organizations across the region to contribute to and participate in NCCARE360, an electronic statewide care network administered by the NC Department of Health and Human Services, to streamline COVID-related assistance.	COGs, healthcare organizations
Coordinate with stakeholders to adjust or enhance workforce training and hiring programs for pandemic resilience, like virtual hiring and job fairs and a virtual platform to connect job seekers and employers.	COGs, workforce development professionals
Support area agencies on aging to determine the need for adjustment of programs that seek to improve the prosperity and financial wellbeing of the region's senior citizen workforce.	COGs
Support increasing educational and development opportunities in healthcare professions, especially increasing the pipeline of healthcare workers to rural and underserved areas.	COGs, healthcare organizations
Convene at least one workshop for regional stakeholders, in partnership with regional workforce development organizations, with a focus on responding to or preparing for workforce development impacts resulting from the COVID-19 pandemic.	COGs
Collaborate with stakeholders to address the economic impacts of childcare and eldercare	COGs

challenges.	
Work to better understand the importance, support needs, and development opportunities of essential workers	COGs, workforce development professionals

Goal (5) Encourage entrepreneurs and small business growth, support existing businesses, and attract new employers in the region.

Perspective: According to a recent Forbes article, “the global pandemic has brought about a true boom in startups, as the number of new companies around the world has significantly surpassed the indicators of last year. Such a surge in entrepreneurship is being attributed to workers who were laid off and started their own businesses.” ⁶²

Actions	Partner
Work with small business support organizations, incubators, accelerators, and investment groups to survey and understand the scope and diversity of small businesses across the region	Regional universities and community colleges
Support the district’s industrial and business site development efforts to assist in attracting and retaining quality employers, recognizing that the COVID-19 pandemic has presented significant impacts to the commercial real estate industry and site selection process.	County and regional economic developers
Collaborate with stakeholders to address the region’s economic development infrastructure needs to help regional stakeholders prioritize most strategic investments at existing or additional business and industrial sites.	County and regional economic developers

General Recommendations

Continue to research and share educational, technical, and funding resources with stakeholders through newsletters, social media content, special meetings, workshops, and Board of Director updates.

Participate with federal, state, and local organizations and networks to help coordinate resource development and dissemination for stakeholders. For example, the COG could actively participate in the NC Inclusive Disaster Recovery Network that continues to share information about funding opportunities and other resources through its contact list of

nearly 1,000 individuals and organizations.

Partner and coordinate with member local governments and organizations across the SEDC district to implement the CEDS and this COVID-19 Addendum, while continuing to convene the CEDS Strategy Committee to invite input on regional priorities and monitor the effectiveness of the CEDS and this COVID-19 Addendum.

Conclusion

This update to the existing CEDS describes the initial and lingering impacts of the COVID-19 pandemic across the SEDC region, statewide, and nationally. Though the regional economy is recovering, the pandemic's impact on workforce has created supply chain bottlenecks that are limiting business and industry capacity, raising consumer prices, and forcing companies to attempt creative workforce strategies like increased wages, extra benefits, automation, and flexible work schedules. So far, these strategies have had limited benefits.

During this project, the region's stakeholders and leaders were interviewed to gather direct, first-person accounts about how COVID-19 impacted the region and how citizens responded. People shared a wide variety of opinions and commentary and the relevant sections in this report should be read closely. In general, interviewees noted that organizations had to pivot quickly to a virtual environment and that communication, coordination, and networking were essential to managing and surviving the crisis. To anticipate the next shock, regional organizations plan to rely on regional networks, capacity building, and increased training.

Lastly, this pandemic response includes updated strategies to the existing CEDS goals that will help build recovery and resilience. These recommendations will equip the SEDC to help regional leaders, business owners, and residents improve recovery and resilience and ignite changes that lead to meaningful impacts. To be effective, it will be important that regional stakeholders act deliberately and continue to focus on required actions to execute the necessary incremental changes. Leadership and commitment are required to implement the suggestions in this report, and fortunately, the SEDC region has strong organizations and citizens who work tirelessly for the health and well-being of the region.

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Appendix A – CEDS Strategy Committee

- LaChaun Banks, NC Growth, UNC Frank Hawkins Kenan Institute of Private Enterprise
- Paul Barnes, Aberdeen & Rockfish Railroad Company
- Jim Bradshaw, Cape Fear Council of Governments—Workforce Development Business Services
- Martie Butler, Richmond County Economic Development Commission
- Jim Caldwell, Mid-Carolina Council of Governments
- Amy Cannon, Cumberland County
- James Freeman, UNC-Pembroke Thomas Family Center for Entrepreneurship
- Thomas Hall, UNC-Pembroke Thomas Family Center for Entrepreneurship
- Barry Graham, Eco-Building LLC
- Mike Hargett, Brunswick County Economic Development Commission
- Chuck Heustess, Bladen County Economic Development and Bladen's Bloomin' Agri-Industrial Inc.
- Velva Jenkins, Brunswick Community College Economic & Workforce Development
- Randall Johnson, North Carolina Biotechnology Center, Southeastern Office
- Gary Lanier, Columbus County Economic Development & Planning
- Mark Lanier, University of North Carolina at Wilmington
- Chris May, Cape Fear Council of Governments
- Gwen McGougan, Hoke County
- Jackie Newton, Pender County
- Cliff Pyron, North Carolina State Ports Authority
- David Richardson, Lumber River Council of Governments
- Carnell Robinson, Harnett County
- Jimmy Smith, Four County Electric Membership Corporation, Economic & Community Development
- Jill Smith, Campbell Oil Company
- Jerry Stephens, Robeson County
- Larry Stone, Larry Stone & Association
- John Swope, Sampson County Economic Development Commission
- Greg Taylor, Carolina Small Business Development Fund
- Mark Ward, Scotland County Economic Development Corporation
- Beth Wilkerson, Small Business and Technology Development Center
- Steve Yost, NC's Southeast

- Mark Zeigler, North Carolina Department of Commerce, Community Development

Appendix B - Stakeholders interviewed

- Amanda Martin, Chief Resilience Officer, NC Office of Recovery and Resiliency ,
- Bob Weston, Director, Statewide COVID 19 Business Recovery and Resiliency Program, Small Business & Technology Development Center (SBTDC)
- Brownwyn Lucas, Senior Director of Leadership and Engagement, NC Rural Center,
- Bryan Byfield, Program Director, Sustainable Communities Initiative
- Carolyn Fryberger, Assistant Director of Economic Development, NCGrowth,
- Claudia Stack, Educator, Writer, Documentary Filmmaker
- Dale McInnis, President, Richmond County Community College
- Gary Lanier, Director, Columbus County Economic Development & Planning
- Grace Lawrence, Community Economic Development Planner, NC Commerce,
- James Wolfe, Existing Industry Expansions Manager, Southeast Region, Economic Development Partnership of NC
- Mark Lanier, Assistant to the Chancellor, University of North Carolina at Wilmington
- Mark Ward, Director, Scotland County Economic Development Corporation
- Olaunda G. Green, Community Engagement Manager, NC Rural Center,
- Phillip Shumaker, Existing Industry Expansions Manager, South Central Region, Economic Development Partnership of NC,
- Randall Johnson, North Carolina Biotechnology Center, Southeastern Office,
- Randolph Keaton, Executive Director, Men and Women United for Youth and Families,
- Steve Yost, President, North Carolina's Southeast Partnership
- Velva Jenkins, CEO, Lower Cape Fear YWCA
- Will Wright, Director of Raeford/Hoke Economic Development

Appendix 5: Percent Income Spent on Housing

New Hanover County, North Carolina

An estimated 20,028 ($\pm 1,442$) renter households spend more than 30% of household income on housing, which is approximately **49.1% of all renter households ($\pm 3.1\%$)**.

An estimated 11,406 (± 888) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **29.0% of all owner households with mortgages ($\pm 2.1\%$)**.

An estimated 2,256 (± 373) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **12.6% of owner households without mortgages ($\pm 2.0\%$)**.

Brunswick County, North Carolina

An estimated 4,910 (± 665) renter households spend more than 30% of household income on housing, which is approximately **43.4% of all renter households ($\pm 4.8\%$)**.

An estimated 9,034 (± 721) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **31.3% of all owner households with mortgages ($\pm 2.2\%$)**.

An estimated 2,148 (± 372) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **11.1% of owner households without mortgages ($\pm 1.8\%$)**.

Pender County, North Carolina

An estimated 2,007 (± 404) renter households spend more than 30% of household income on housing, which is approximately **45.4% of all renter households ($\pm 7.8\%$)**.

An estimated 3,123 (± 383) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **28.1% of all owner households with mortgages ($\pm 3.1\%$)**.

An estimated 927 (± 204) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **12.8% of owner households without mortgages ($\pm 2.6\%$)**.

Sampson County, North Carolina

An estimated 2,528 (± 404) renter households spend more than 30% of household income on housing, which is approximately **39.0% of all renter households ($\pm 5.4\%$)**.

An estimated 2,422 (± 429) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **31.5% of all owner households with mortgages ($\pm 5.2\%$)**.

An estimated 762 (± 198) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **8.5% of owner households without mortgages ($\pm 2.1\%$)**.

Bladen County, North Carolina

An estimated 1,415 (± 318) renter households spend more than 30% of household income on housing, which is approximately **38.0% of all renter households ($\pm 7.4\%$)**.

An estimated 1,453 (± 313) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **37.1% of all owner households with mortgages ($\pm 7.1\%$)**.

An estimated 1,165 (± 301) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **20.3% of owner households without mortgages ($\pm 5.0\%$)**.

Columbus County, North Carolina

An estimated 2,542 (± 464) renter households spend more than 30% of household income on housing, which is approximately **42.3% of all renter households ($\pm 6.8\%$)**.

An estimated 2,294 (± 394) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **33.4% of all owner households with mortgages ($\pm 5.0\%$)**.

An estimated 1,934 (± 394) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **22.3% of owner households without mortgages ($\pm 4.2\%$)**.

Robeson County, North Carolina

An estimated 5,897 (± 416) renter households spend more than 30% of household income on housing, which is approximately **38.2% of all renter households ($\pm 2.3\%$)**.

An estimated 3,279 (± 304) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **28.4% of all owner households with mortgages ($\pm 2.2\%$)**.

An estimated 3,032 (± 332) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **16.0% of owner households without mortgages ($\pm 1.7\%$)**.

Cumberland County, North Carolina

An estimated 29,090 ($\pm 1,038$) renter households spend more than 30% of household income on housing, which is approximately **47.0% of all renter households ($\pm 1.4\%$)**.

An estimated 13,164 (± 853) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **29.9% of all owner households with mortgages ($\pm 1.8\%$)**.

An estimated 3,377 (± 406) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **15.6% of owner households without mortgages ($\pm 1.8\%$)**.

Hoke County, North Carolina

An estimated 2,644 (± 416) renter households spend more than 30% of household income on housing, which is approximately **44.8% of all renter households ($\pm 6.1\%$)**.

An estimated 2,217 (± 347) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **26.7% of all owner households with mortgages ($\pm 3.8\%$)**.

An estimated 676 (± 160) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **15.9% of owner households without mortgages ($\pm 3.4\%$)**.

Scotland County, North Carolina

An estimated 2,304 (± 239) renter households spend more than 30% of household income on housing, which is approximately **44.3% of all renter households ($\pm 3.7\%$)**.

An estimated 1,100 (± 196) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **30.1% of all owner households with mortgages ($\pm 4.7\%$)**.

An estimated 650 (± 146) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **15.9% of owner households without mortgages ($\pm 3.4\%$)**.

Richmond County, North Carolina

An estimated 2,548 (± 412) renter households spend more than 30% of household income on housing, which is approximately **41.1% of all renter households ($\pm 5.5\%$)**.

An estimated 1,959 (± 373) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **32.2% of all owner households with mortgages ($\pm 5.5\%$)**.

An estimated 955 (± 254) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **16.2% of owner households without mortgages ($\pm 4.1\%$)**.

Harnett County, North Carolina

An estimated 6,056 (± 535) renter households spend more than 30% of household income on housing, which is approximately **38.5% of all renter households ($\pm 2.8\%$)**.

An estimated 5,041 (± 476) owner households with mortgages spend more than 30.0% of household income on housing, which is approximately **25.5% of all owner households with mortgages ($\pm 2.2\%$)**.

An estimated 1,421 (± 311) owner households without mortgages spend more than 30.0% of household income on housing, which is approximately **12.9% of owner households without mortgages ($\pm 2.7\%$)**.

Appendix 6: Housing Snapshots

Figure 31 Bladen County Housing Snapshot

