

The 2023-2027
Comprehensive Economic Development Strategy
prepared for:

Kerr-Tar

Regional Council
Of Governments

Prepared by:

Sanford Holshouser Economic Development Consulting, LLC

Your Partner for Economic Prosperity



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December, 2022

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- Attachment A: SWOT Questionnaire
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EXECUTIVE SUMMARY

The United States Department of Commerce Economic Development Administration (the “EDA”) requires that for a council of governments to be eligible to receive EDA funding it must prepare and maintain a current five-year Comprehensive Economic Development Strategy (CEDS) for the Economic Development District (“EDD”) served by the COG. The Kerr-Tar Regional Council of Governments (COG) previously prepared and had in place a CEDS which covered the five-year period from 2017-2022. Consequently, the COG in 2022 undertook an effort to develop a CEDS for the period from 2023 through 2027.

Sanford Holshouser Economic Development Consulting LLC (SHEDC) was retained by the COG to conduct a planning process and to produce the CEDS which follows. SHEDC is a consulting group which consists of partners who have extensive experience as economic developers at local, regional, and state levels. In addition, they have extensive experience as consultants to economic development programs and in representing companies in site selection projects. This real life, practical experience in economic development was brought to bear in the preparation of this CEDS.

Any strategic action plan is most effective if all stakeholders had the opportunity to have input into that plan which engenders a sense of ownership in that plan. Consequently, SHEDC in collaboration with COG staff conducted focus groups with the CEDS committee and with each of the five constituent counties within the COG EDD. In addition, interviews were conducted with a number of key senior leadership. This input was supplemented by a survey of a broad array of others within the COG EDD.

Input from all participants was very robust and informative. The input from those processes led to an overview of strengths, weaknesses, opportunities, and threats to the COG EDD’s and constituent Counties’ economic development potential. While the region deals with a number of inherent weaknesses and faces a number of potential threats to its future, overall, the economic development opportunities available to the five counties in the EDD are enormously positive. The question then becomes, what can the COG do to assist in maximizing the EDD’s future economic development potential.

Ideas which arose from the above-described process, which were validated by the SHEDC partners in their collective judgment included specific goals, which are calculated to achieve positive economic development results. A number of these goals very positively impact and promote inclusivity and diversity in the EDD. These goals were grouped in a number of key areas to include:



- Product development (i.e. business parks and shell buildings)
- Small business and entrepreneurial development

- Downtown revitalization



- Branding and marketing the region
- Enhancing the labor force
- Promoting niche economic development strategies



- Enhancing recreational opportunities

- Leveraging existing industry for greater economic growth



It is recommended that each year the COG convene a planning session with constituent partners to delineate objectives for the upcoming year to work toward achieving these goals within the five-year period covered by the CEDS.

The accomplishments to date by the COG and constituent partners in the EDD are noteworthy. It was apparent from the focus groups and interviews that there is a great deal of energy and enthusiasm for the future economic development opportunities facing the EDD and its constituent partners. Those factors coupled with the goals described in this report point toward a very bright future for the COG area.

INTRODUCTION

History of Kerr Tar Regional Council of Governments



Councils of Governments were formed under NC General Statutes §§160-77.1 through 160-77.6 (current Statutes are: §§160A-470 through 160A-478 which authorizes any two or more municipalities and counties to create a Regional Council of Local Officials. Under the leadership of Governor Bob Scott, seventeen (17) regions were designated throughout the State of North Carolina. In late 1970, City and County officials banded together to explore forming a Council of Governments to serve Region K (counties of Franklin, Granville, Person, Vance, and Warren and

the 11 municipalities therein). Today the Kerr-Tar Region consists of these 5 named counties and 16 municipalities; however, there are only 16 COGs across the state as some have combined.

Dr. W. M. Wester, Jr. served as the first Chairman of this Council during the organizational period. In May of 1971, the official name of the Council was selected: Kerr-Tar Regional Council of Governments, with its purpose being to promote intergovernmental cooperation by developing and formalizing policy recommendations concerning matters having area-wide significance. Areas of interest and concern to the members organizing the Council of Governments were as follows: solid waste, health services, regional water system, family planning, programs for the elderly, and manpower. Today the COG has the following programs: Aging, Economic and Community Development, Economic Development Administration, Business Loans, Planning, Transportation, and Workforce Development. It also provides Administrative Services for the Region K CAC and Kerr-Tar Regional Economic Development Corporation.

Background of and Current Guidelines for Comprehensive Economic Development Strategy Five Year Plans

In March 1975, the United States Department of Commerce's Economic Development Administration (EDA) designated the geographic area served by the Kerr-Tar Regional Council of Governments (COG) as an Economic Development District (EDD). As the administrative body of the Kerr-Tar EDD, the COG receives economic development planning funds from EDA and is eligible to participate in the development and administration of EDA-funded projects in the region. The COG is also responsible for preparation and maintenance of a Comprehensive Economic Development Strategy (CEDS) for the EDD.

The CEDS is both a document and a process. It is a process of analyzing, planning, and taking action to generate new economic development activity and improve community infrastructure and services. Certification of this document by the EDA allows the counties and municipalities to qualify for funding from the various EDA grant programs. The purpose of the CEDS is to create a process that will "create jobs, foster more stable and diversified economies, improve living conditions and provide a mechanism for coordinating the efforts of people, organizations, local governments, and private industry concerned with economic development".

The CEDS process begins with the appointment of the "CEDS Committee." The committee is responsible for convening the planning process and overseeing implementation of the plan. The committee must be representative of the economic development community within the region including business, industry, government, non-profit organizations, and educational entities.

The CEDS includes a summary background, the results of the strengths, weaknesses, opportunities, and threats (SWOT analysis), regional resiliency analysis, CEDS Strategies by topic and CEDS Performance Measures.

Previously a CEDS was prepared for the Period of 2017 – 2022. The current planning process and this report is focused on the period of 2023 to 2028 Sanford Holshouser Economic Development Consulting LLC (“Sanford Holshouser”) was engaged to work with the COG staff to conduct this CEDS process, provide its professional judgment in analyzing input from that process and providing this report.

In accordance with the US EDA’s “Comprehensive Economic Development Strategy (CEDS) Content Guidelines: Recommendations for Creating and Impactful CEDS” (the “Guidelines”), SHEDC considered relevant factors set forth in that document.

SHEDC gave consideration to the importance of economic resilience. The guidelines define economic resilience as “the ability to avoid, withstand and recover from economic shifts, natural disasters, the impacts of climate change, etc.” From all comments in the focus groups and interviews (outlined below), it is absolutely clear that area-wide, throughout the EDD there is, and in the foreseeable future will be, a strong upward trend in economic growth. Certainly, by way of the recommendations set forth in this CEDS those upward trends in economic development activity and economic growth can be enhanced and more effectively directed. However, concerns about resilience to withstand economic downturns are of less importance in this COG area, as opposed to others. Consequently, comments on and recommendations to address economic resilience are not a predominant theme within this report. The economic trends for this EDD are decidedly upward and the EDD is well positioned to handle any dislocations caused by natural disasters and shifts due to climate change.

Another area of emphasis in the Guidelines which is reflected in this CEDS, is the need for diversity and inclusivity. This is highly important to address the needs of underserved segments of the population in the EDD. But it is also essential for enhancing economic growth area-wide throughout the EDD. Some strategies by their nature, cannot be tailored to serve the essential goals of diversity and inclusivity. For example, regarding the need to develop business parks and shell buildings to enhance business recruitment efforts, these meritorious goals have little applicability. However, as will be seen in the following, strategies to enhance diversity and inclusivity are interwoven into recommendations regarding small business/entrepreneurial assistance, downtown revitalization, and workforce enhancements.

This CEDS is in the tradition of previous CEDS and the background/history of CEDS, and it encompasses essential elements of the Guidelines.

Scope of Work

Preparing any strategic economic development action plan requires answering the following questions:

- Where are we now?
- Where do we want to go?
- How do we get there?

The process managed by the COG staff and Sanford Holshouser was designed to elicit input from key stakeholders on these essential questions.

Specifically, the work undertaken in this CEDS process included the following:

- A detailed demographic and economic statistical analysis of the five counties which are within the EDD.
- Six focus groups, one with the CEDS Committee and five with selected leaders within each of the five counties.
- Interviews of key leaders within the EDD, as identified by local developers, who were not able to attend the respective focus groups were also conducted.

From this process, a clear consensus arose as to certain critical economic development enhancements which were needed, in order for each of the five counties and the EDD as a whole to move forward more positively and aggressively in economic development growth. The initiatives set forth in this report build upon significant economic development efforts and gains the COG and its constituent local governments have achieved in the past, and delineates specific action plans, with performance matrices, which are targeted toward an extraordinarily bright future for this region. Based upon this, the report set forth herein is entitled:

Building on a Strong Past, Focused on an Extraordinary Future



Key Stakeholders and COG Staff

CEDS Committee Members:

- Carla Norwood, PhD, Executive Director, Working Landscapes
- Gabriel Cumming, PhD, Associate Director, Working Landscapes
- Marley Spencer, Executive Director, Person County Tourism Development Authority
- Angela Allen, Tourism Development Authority Director, Granville Tourism Development Authority
- Mayor Jacqueline (Jackie) Sergent, City of Oxford
- John Snow, CEO, Granville Health System
- Michele Burgess, President, Henderson-Vance County Chamber of Commerce
- E. Terrell Blackmon, City Manager, City of Henderson
- Brooks Lockhart, City Manager, City of Roxboro
- Jerry Edmonds, III, Ed.D., Vice President of Workforce and Community Engagement, Vance-Granville Community College
- Commissioner Derrick Sims, Vice-Chairman, Person County Board of Commissioners
- Commissioner Judy McArn, Town of Franklinton
- Alexis Franks, Director of Workforce and Career Services, Telamon Corporation
- Harry Mills, Director, Granville County Economic Development
- Charla Duncan, Director, Warren County Economic Development Commission
- Sherry Wilborn, Director, Person County Economic Development
- Michael Thibault, Assistant Director, Person County Economic Development
- Richie Duncan, Director, Franklin County Economic Development
- McKinley Perkinson, Director, Henderson-Vance County Economic Development Commission
- Emilee Johnson, Executive Director of Operations, Maria Parham Health -Duke LifePoint Healthcare
- Dr. Alisa McLean, Superintendent, Granville County Public Schools
- Mr. Keith Sutton, Superintendent, Warren County Public Schools
- Karen Franco, Haliwa-Saponi Tribal Council

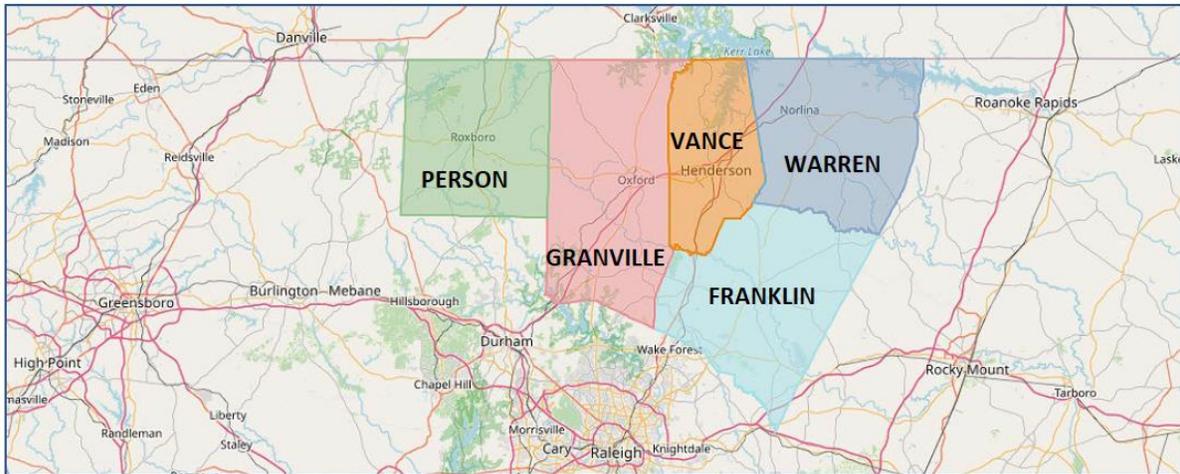
COG Staff:

- Diane Cox, Executive Director
- Michael Kelly, Regional Planning & Economic Development Director
- Lou Grillo, Workforce Development Director
- Nancy Francis, Area Agency on Aging Director
- **KTRCOG Member Governments and Their Representatives:**
- **Franklin County**
 - Kim Denton, County Manager
 - William Doerfer, Assistant County Manager

- **Granville County**
 - Drew Cummings, County Manager Drew Cummings
 - Korena Weichel, Assistant County Manager
- **Vance County**
 - Jordan McMillen, County Manager
- **Warren County**
 - Vincent Jones, County Manager
- **Person County**
 - Katherine Cathey, County Manager
- **Town of Bunn**
 - Pamela Perry, Town Administrator
- **Town of Butner**
 - Thomas S. Marrow, Town Manager
- **City of Creedmoor**
 - Mike Turner, City Manager
- **Town of Warrenton**
 - Robert Davie, Jr., Town Administrator
- **Town of Kittrell**
 - Mayor Jerry Joyner
- **Town of Macon**
 - Mayor Carroll Harris
- **Town of Middleburg**
 - Mayor Ray Bullock
- **Town of Louisburg**
 - Sean Medlin, Town Administrator
- **Town of Norlina**
 - Blaine Reese, Director of Operations
- **City of Roxboro**
 - Brooks Lockhart, City Manager
- **Town of Franklinton**
 - Zachary Steffey, Town Manager
- **City of Henderson**
 - E. Terrell Blackmon, City Manager
- **Town of Stem**
 - Mayor Casey Dover
- **Town of Stovall**
 - Janet Parrott, Town Administrator
- **City of Oxford**
 - M. Alan Thornton, City Manager
- **Town of Youngsville**
 - Nathan Page, Town Administrator

DEMOGRAPHIC PROFILE

The Kerr-Tar Regional Council of Governments (KTRCOG) region consists of five counties - Person, Granville, Vance, Franklin, and Warren – located in the north central part of North Carolina between the Research Triangle Park (RTP) area and the Virginia border. Collectively, the Kerr-Tar Region is the location of more than 230,000 residents and 65,600 employees as of 2021. The following is the overview of demographic and economic indicators for the region.



Population

Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Franklin County	47,611	60,835	27.8%	69,060	13.5%	71,703	10.9%
Granville County	48,824	57,673	18.1%	61,041	5.8%	61,986	5.6%
Person County	35,759	39,411	10.2%	39,146	-0.7%	39,127	-0.4%
Vance County	43,159	45,289	4.9%	42,529	-6.1%	42,185	-5.2%
Warren County	19,913	20,987	5.4%	18,598	-11.4%	18,762	-5.6%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Franklin County	85,231	23.7%	101,748	19.4%	118,264	16.2%
Granville County	67,636	10.8%	74,620	10.3%	81,601	9.4%
Person County	39,201	0.3%	39,298	0.2%	39,334	0.1%
Vance County	41,204	-2.9%	41,133	-0.2%	41,131	0.0%
Warren County	16,754	-9.9%	15,660	-6.5%	15,055	-3.9%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021

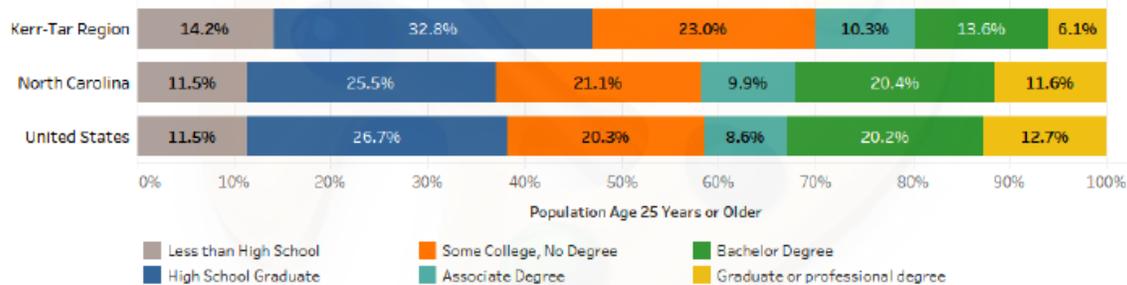
Age Group	Franklin County		Granville County		Person County		Vance County		Warren County		Kerr-Tar Region	
	#	%	#	%	#	%	#	%	#	%	#	%
0–9 years	8,090	11.3%	6,439	10.4%	4,213	10.8%	5,303	12.6%	1,730	9.2%	25,775	11.0%
10–19 years	9,150	12.8%	7,661	12.4%	4,551	11.6%	5,714	13.5%	1,945	10.4%	29,021	12.4%
20–29 years	8,416	11.7%	7,138	11.5%	4,386	11.2%	5,153	12.2%	1,936	10.3%	27,029	11.6%
30–39 years	8,906	12.4%	7,676	12.4%	4,333	11.1%	4,752	11.3%	1,977	10.5%	27,644	11.8%
40–49 years	8,995	12.5%	7,908	12.8%	4,622	11.8%	4,630	11.0%	1,956	10.4%	28,111	12.0%
50–59 years	10,536	14.7%	9,574	15.4%	5,718	14.6%	5,596	13.3%	2,580	13.8%	34,004	14.5%
60–69 years	9,594	13.4%	8,144	13.1%	5,904	15.1%	5,560	13.2%	3,235	17.2%	32,437	13.9%
70–79 years	5,642	7.9%	5,149	8.3%	3,726	9.5%	3,729	8.8%	2,280	12.2%	20,526	8.8%
80+ years	2,374	3.3%	2,297	3.7%	1,674	4.3%	1,748	4.1%	1,123	6.0%	9,216	3.9%

Source: U.S. Census Bureau, Population Estimates

Educational Attainment

Educational Attainment, 2020

Population Ages 25 Years or Higher



Housing Stock

Housing Units, 2020

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region	North Carolina	United States
Housing Units	29,358	24,214	18,284	19,276	11,309	102,441	4,708,710	140,498,736
% Occupied	90%	93%	88%	88%	70%	88%	88%	90%
% Vacant	10%	7%	12%	12%	30%	12%	12%	10%

Source: U.S. Census Bureau, 2020 Census

Income

Household Income Distribution, 2020

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region*	North Carolina	United States
Median Household Income	\$58,172	\$56,924	\$57,323	\$41,827	\$37,476	\$52,160	\$56,642	\$64,994
Median Disposable Income	\$51,920	\$53,132	\$49,075	\$38,062	\$39,338	\$48,262	\$52,061	\$58,350

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020, ESRI

Employment Trend

65,601

Average Employment
Kerr-Tar Region, 2021

-1,861

Job Change 2016-2021
Kerr-Tar Region, 2021

Industry Wages

\$44,197

Average Wage
Kerr-Tar Region, 2020

32%

Kerr-Tar Region Wage is 32%
Below the National Average Wage

Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Commuting Patterns

Commuting Patterns, 2019



Source: 2019 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Data represent primary jobs or one job per worker.

Regional Retail Sales Growth, Fiscal Years 2016-2021

Geography	2016	2017	2018	2019	2020	2021
Franklin County	\$356M	\$394M	\$415M	\$449M	\$499M	\$655M
Granville County	\$318M	\$352M	\$350M	\$375M	\$404M	\$477M
Person County	\$295M	\$313M	\$334M	\$360M	\$357M	\$427M
Vance County	\$418M	\$436M	\$428M	\$450M	\$469M	\$670M
Warren County	\$73M	\$78M	\$81M	\$87M	\$96M	\$132M
Kerr-Tar Region	\$1,460M	\$1,572M	\$1,608M	\$1,722M	\$1,824M	\$2,362M

Source: NC Department of Revenue

POPULATION

Currently the overall population is nearly 234,000 people as of 2021. Population growth from 2010-2020 was 2.8%. While this was a positive change, it was far under the percentage change at the state and national levels of 9.2% and 7.2% respectively. Interestingly, the 2.8% change in regional population from 2010-2020 was considerably LESS than the 14.8% change from 2000-2010.

The region's rate of change over the last five years of 3.0% more closely matches the state's five-year rate of 3.9%. Over both the last 10 years and the last five years, the growth of two of the KTRCOG counties – Franklin and Granville – significantly outpaced the growth of the other three counties. The rates of change in Franklin were 13.5% over 10 years and 10.9% over five years while Granville experienced 5.8% growth over the past decade and 5.6% growth in the last five years. Over these same periods, the other three counties all lost population. This suggests that while the influence of the RTP counties is accelerating into the region, that influence is UNEVEN across the KTRCOG counties.

This condition of uneven change between Franklin and Granville counties as compared to that in Person, Vance, and Warren can be seen in other regional demographics. Future population projections show both Franklin and Granville counties with robust, mostly double-digit growth in each of the next three decades. Projected growth in Person, Vance, and Warren counties are flat or negative. The age distribution of the population is comparatively younger in Franklin and Granville counties than in Person, Vance, and Warren and the region overall. The “graying of America” is evident across all counties of the region with each county's top population group being 50 years or older. Those that are 50 to 59 years old comprise the largest percentage of the region's population at 14.5% of the total. Overall, the working age population, ages 15 to 64 years is 63.5% of the total population compared to that of 65.1% in North Carolina and 64.9% nationwide.

Franklin and Granville counties have more housing units, more educational attainment, more household and disposable income, and lower poverty rates. Thirty percent of the region's population has earned a college degree – Associate, Bachelor's, or Graduate level. Franklin and Granville counties have 31.9% and 33.9% respectively, however this is still lower than the North Carolina rate of 41.9% and the national rate of 41.5% of college educated population aged 16 years or higher. Income distribution in Franklin, Granville, and Person counties shows a sizable middle class with the highest percentage of household income levels were between \$50,000 and \$74,999.

COMMUTING

While 30,063 people both live and work in the region, the region is a net exporter of labor in that 22,438 people in-commute to the region while 63,740 people out-commute from the region. Neighboring Durham and Wake counties (the primary counties of the RTP region) are the most significant counties for commuting in to and out from the KTRCOG counties. Commuting figures reflect activity in 2019 prior to the COVID 19 pandemic, however some the region's largest

sectors like manufacturing, health care, and retail will continue to see in-person work with possible inter-county commuting.

EMPLOYMENT

The regional average employment is 65,601. The Manufacturing sector is the top sector employing 15% of the region's workers. This is comparatively higher than the state and national levels of 9.7% and 8.1% respectively. Following closely are the Health Care & Social Assistance sector (14.9%) and retail jobs (11.6%). Losses in the manufacturing sector contributed to the overall loss of 1,861 jobs in the region since 2016. Employment has not yet returned to pre-pandemic levels, but growth is forecasted.

While KTRCOG regional average employment trailed both state and national averages over the last five and ten-year periods, the future employment trends are positive for the region comparing well with the projected national average though less than the state average. Transportation and Warehousing is a particularly strong sector for the region and has been for the last five and ten-year periods. The region's location on Interstate 85, mid-US east coast, and proximity to the RTP region in combination with its land/labor availability and costs and available utilities make the region attractive for distribution facilities and services. This sector experienced a net gain of 1,184 jobs in the region reflecting massive growth during the COVID-19 pandemic as consumer shopping habits changed the need for more warehousing in many markets. The region's employment in this sector grew 38.8% during the past five years compared to 36.5% in North Carolina and 19.4% nationwide.

The annual average wage in the KTRCOG region is \$44,197 which is 32% below the national average. Annual average wages range from \$34,824 in Warren County to \$48,020 in Granville County.

RETAIL SALES

Retail Sales grew by an annual average of 6% regionally since 2016 but grew significantly in FY 20-21 by 29% - some of which is attributed to the COVID-19 pandemic effect on retail. Sales statistics include food, general merchandise, drug stores, along with hardware or home improvement stores. Franklin Warren counties led growth over the last five years with Vance and Warren counties leading the FY 20-21 period growth. In sheer volume of retail, Franklin and Vance counties top regional sales. Vance County also led in retail sales per capita growth statistics in 2020, 2021, and 1-year change.

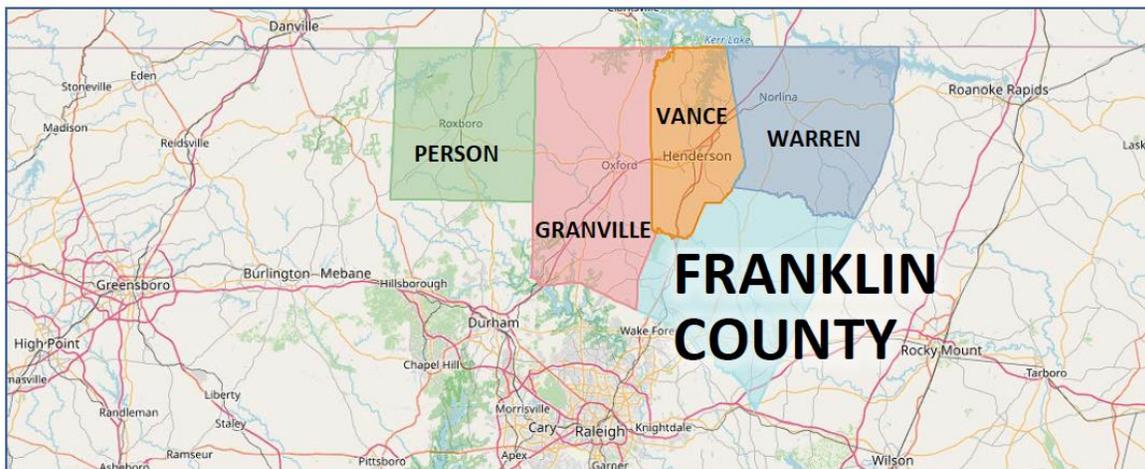
BROADBAND

Broadband access and speed are crucial to future business and population growth and creating equitable opportunities across the region. The ability to work, shop, and educate needs a strong backbone of internet. The first indicator is access, in terms of the number of households that have the ability to get internet services via fiber, cable, DSL or fixed wireless at speeds of 250 megabits per second (Mbps) and one gigabit per second (Gbps). At 250 Mbps, 3-5 average users can stream video, meetings, gaming and manage the increasing level of home automation.

All urban areas in the region have superb access to broadband of 250 Mbps or higher. Rural household access to this level of internet service is good with most Granville and Warren counties trailing in this indicator. Access to Gig-level service is limited in the region. This latter level is not a detriment to most current needs, however, as technology tools increase, this is a needed infrastructure piece to success.

Internet speed reflects a collection of documented speed tests in which the time to download a file is measured. This indicator ranges from a low, slow 23.11 Mbps in Macon (Warren County) to a speedier 140.89 Mbps in Louisburg (Franklin County). The number of internet providers is adequate with all areas examined show at least one provider advertising speeds of 940 Mbps (close to 1 Gig) or higher.

The following are snapshot graphic representations of the demographics of the individual counties that are members of the KTRCOG:



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Franklin County	47,611	60,835	27.8%	69,060	13.5%	71,703	10.9%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

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Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021¹

Age Group	Franklin County		Kerr-Tar Region	
	#	%	#	%
0-9 years	8,090	11.3%	25,775	11.0%
10-19 years	9,150	12.8%	29,021	12.4%
20-29 years	8,416	11.7%	27,029	11.6%
30-39 years	8,906	12.4%	27,644	11.8%
40-49 years	8,995	12.5%	28,111	12.0%
50-59 years	10,536	14.7%	34,004	14.5%
60-69 years	9,594	13.4%	32,437	13.9%
70-79 years	5,642	7.9%	20,526	8.8%
80+ years	2,374	3.3%	9,216	3.9%

Income

Median Income

Category	Franklin County	Kerr-Tar Region*	North Carolina	United States
2020 Median Household Income ²	\$58,172	\$52,160	\$56,642	\$64,994
2022 Median Disposable Income ³	\$51,920	\$48,262	\$52,061	\$58,350

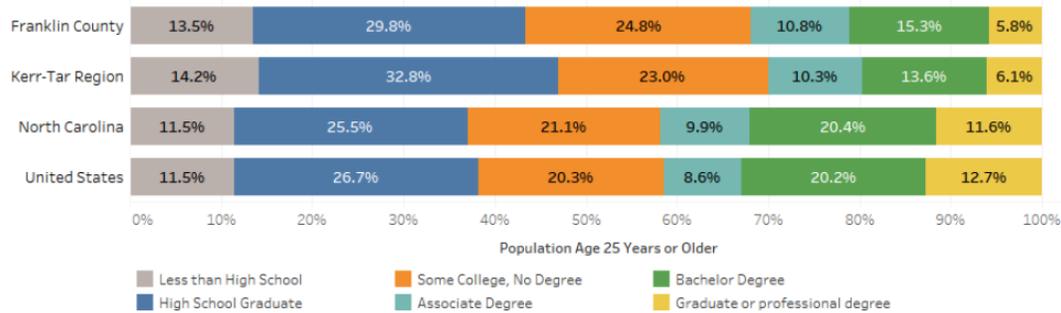
Housing Stock

Housing Units, 2020

Category	Franklin County	Kerr-Tar Region	North Carolina	United States
Housing Units	29,358	102,441	4,708,710	140,498,736
% Occupied	90%	88%	88%	90%
% Vacant	10%	12%	12%	10%

Educational Attainment

Educational Attainment, 2020²



Employment & Wages

Franklin County Top Employers, 2021⁴

Company Name	Industry	Employment
Franklin County Schools	Educational Services	1000+
County Of Franklin	Public Administration	500-999
Novozymes North America Inc	Manufacturing	500-999
Captive-Aire Systems Inc.	Manufacturing	250-499
K-Flex Usa Llc	Manufacturing	100-249
Wal-Mart Associates Inc.	Retail Trade	100-249
Team Manufacturing East West	Manufacturing	100-249
Dept Of Public Safety	Public Administration	100-249
Palziv North America Inc	Manufacturing	100-249
Majestic Marble & Glass Co	Manufacturing	100-249

14,281

**Average Employment⁵
Franklin County, 2021**

\$45,487

**Average Wage⁵
Franklin County, 2020**

¹ Source: U.S. Census Bureau, 2020 Census

² Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Kerr-Tar Region Income from ESRI

³ Source: ESRI

⁴ Source: NC Department of Commerce Labor and Economic Analysis Dept, Based on Quarterly Census of Employment and Wages 2021 Q4

⁵ Source: JobsEQ



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Granville County	48,824	57,673	18.1%	61,041	5.8%	61,986	5.6%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Granville County	67,636	10.8%	74,620	10.3%	81,601	9.4%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021¹

Age Group	Granville County		Kerr-Tar Region	
	#	%	#	%
0–9 years	6,439	10.4%	25,775	11.0%
10–19 years	7,661	12.4%	29,021	12.4%
20–29 years	7,138	11.5%	27,029	11.6%
30–39 years	7,676	12.4%	27,644	11.8%
40–49 years	7,908	12.8%	28,111	12.0%
50–59 years	9,574	15.4%	34,004	14.5%
60–69 years	8,144	13.1%	32,437	13.9%
70–79 years	5,149	8.3%	20,526	8.8%
80+ years	2,297	3.7%	9,216	3.9%

Income

Median Income

Category	Granville County	Kerr-Tar Region*	North Carolina	United States
2020 Median Household Income ²	\$56,924	\$52,160	\$56,642	\$64,994
2022 Median Disposable Income ³	\$53,132	\$48,262	\$52,061	\$58,350

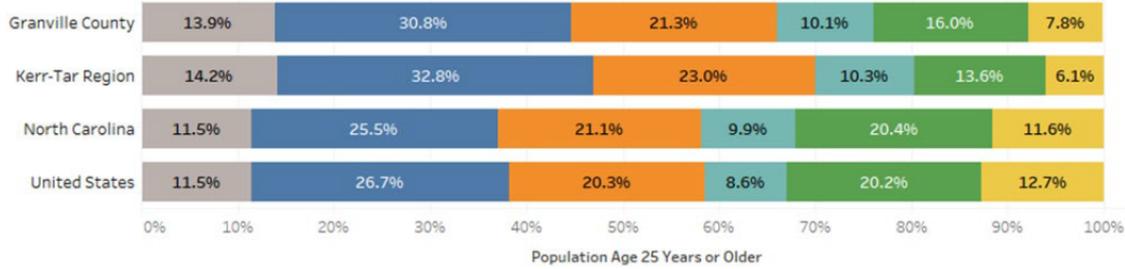
Housing Stock

Housing Units, 2020

Category	Granville County	Kerr-Tar Region	North Carolina	United States
Housing Units	24,214	102,441	4,708,710	140,498,736
% Occupied	93%	88%	88%	90%
% Vacant	7%	12%	12%	10%

Educational Attainment

Educational Attainment, 2020²



Employment & Wages

Granville County Top Employers, 2021⁴

Company Name	Industry	Employment
NC Dept Of Health & Human	Health Care/Social	1000+
U S Dept. Of Justice Justice	Public Administration	1000+
Food Lion	Transp/Warehousing	1000+
Granville County Schools	Educational Services	500-999
Revlon Consumer Products Corp	Manufacturing	500-999
Altec Industries Inc	Manufacturing	500-999
Granville Medical Center	Health Care/Social	500-999
County Of Granville	Public Administration	250-499
Dept Of Public Safety	Public Administration	250-499
Food Lion	Transp/Warehousing	250-499

22,070

Average Employment⁵
Granville County, 2021

\$48,020

Average Wage⁵
Granville County, 2020

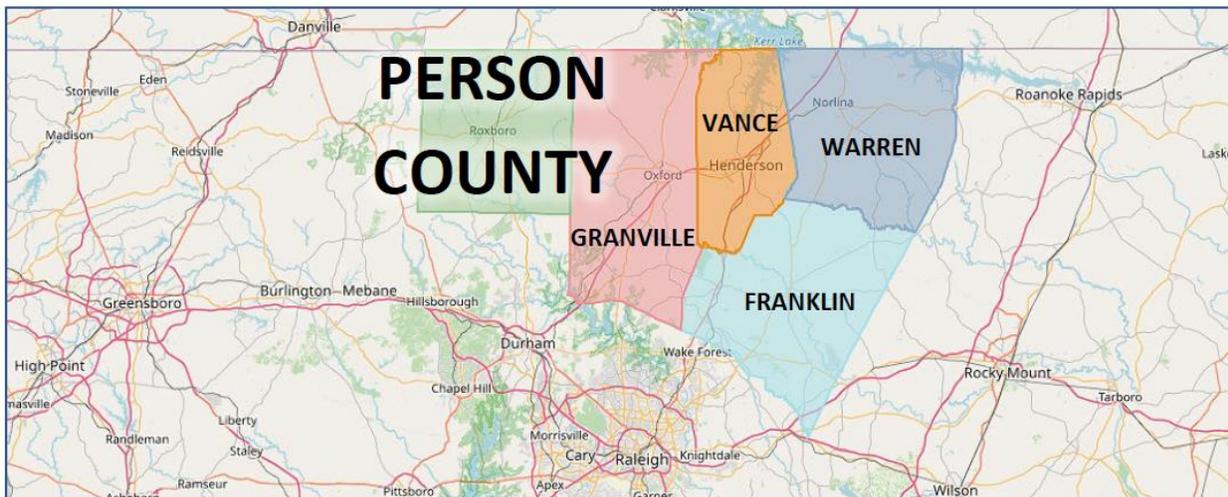
¹ Source: U.S. Census Bureau, 2020 Census

² Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Kerr-Tar Region Income from ESRI

³ Source: ESRI

⁴ Source: NC Department of Commerce Labor and Economic Analysis Dept, Based on Quarterly Census of Employment and Wages 2021 Q4

⁵ Source: JobsEQ



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Person County	35,759	39,411	10.2%	39,146	-0.7%	39,127	-0.4%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Person County	39,201	0.3%	39,298	0.2%	39,334	0.1%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021¹

Age Group	Person County		Kerr-Tar Region	
	#	%	#	%
0–9 years	4,213	10.8%	25,775	11.0%
10–19 years	4,551	11.6%	29,021	12.4%
20–29 years	4,386	11.2%	27,029	11.6%
30–39 years	4,333	11.1%	27,644	11.8%
40–49 years	4,622	11.8%	28,111	12.0%
50–59 years	5,718	14.6%	34,004	14.5%
60–69 years	5,904	15.1%	32,437	13.9%
70–79 years	3,726	9.5%	20,526	8.8%
80+ years	1,674	4.3%	9,216	3.9%

Income

Median Income

Category	Person County	Kerr-Tar Region*	North Carolina	United States
2020 Median Household Income ²	\$57,323	\$52,160	\$56,642	\$64,994
2022 Median Disposable Income ³	\$49,075	\$48,262	\$52,061	\$58,350

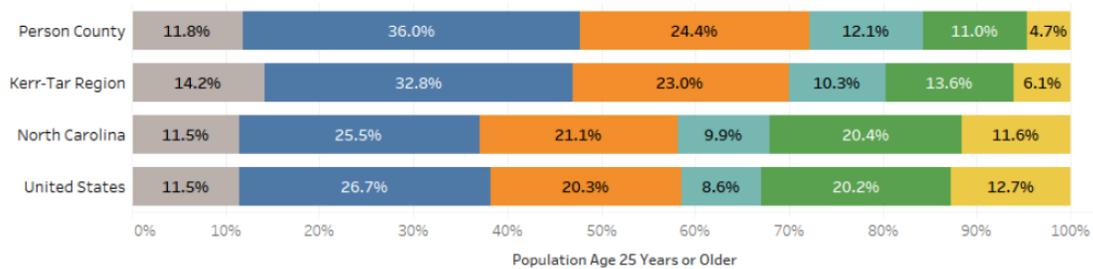
Housing Stock

Housing Units, 2020

Category	Person County	Kerr-Tar Region	North Carolina	United States
Housing Units	18,284	102,441	4,708,710	140,498,736
% Occupied	88%	88%	88%	90%
% Vacant	12%	12%	12%	10%

Educational Attainment

Educational Attainment, 2020²



Employment & Wages

Person County Top Employers, 2021⁴

Company Name	Industry	Employment
Person County Schools	Educational Services	500-999
Gkn Driveline Inc.	Manufacturing	500-999
County Of Person	Public Administration	250-499
Poly Wood Llc	Wholesale Trade	250-499
Wal-Mart Associates Inc.	Retail Trade	250-499
Progress Energy Service Co	Utilities	100-249
Dlp Person Memorial Hospital	Health Care/Social	100-249
Spuntech Industries Inc	Manufacturing	100-249
Piedmont Community College	Educational Services	100-249
Eaton Corporation	Manufacturing	100-249

10,701

**Average Employment⁵
Person County, 2021**

\$42,643

**Average Wage⁵
Person County, 2020**

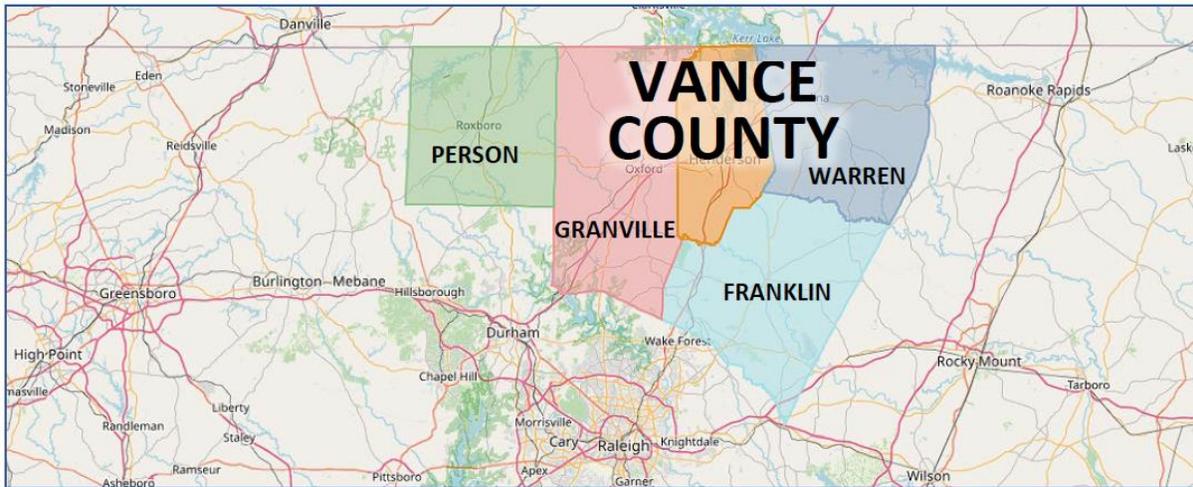
¹ Source: U.S. Census Bureau, 2020 Census

² Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Kerr-Tar Region Income from ESRI

³ Source: ESRI

⁴ Source: NC Department of Commerce Labor and Economic Analysis Dept, Based on Quarterly Census of Employment and Wages 2021 Q4

⁵ Source: JobsEQ



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Vance County	43,159	45,289	4.9%	42,529	-6.1%	42,185	-5.2%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Vance County	41,204	-2.9%	41,133	-0.2%	41,131	0.0%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021¹

Age Group	Vance County		Kerr-Tar Region	
	#	%	#	%
0–9 years	5,303	12.6%	25,775	11.0%
10–19 years	5,714	13.5%	29,021	12.4%
20–29 years	5,153	12.2%	27,029	11.6%
30–39 years	4,752	11.3%	27,644	11.8%
40–49 years	4,630	11.0%	28,111	12.0%
50–59 years	5,596	13.3%	34,004	14.5%
60–69 years	5,560	13.2%	32,437	13.9%
70–79 years	3,729	8.8%	20,526	8.8%
80+ years	1,748	4.1%	9,216	3.9%

Income

Median Income

Category	Vance County	Kerr-Tar Region*	North Carolina	United States
2020 Median Household Income ²	\$41,827	\$52,160	\$56,642	\$64,994
2022 Median Disposable Income ³	\$38,062	\$48,262	\$52,061	\$58,350

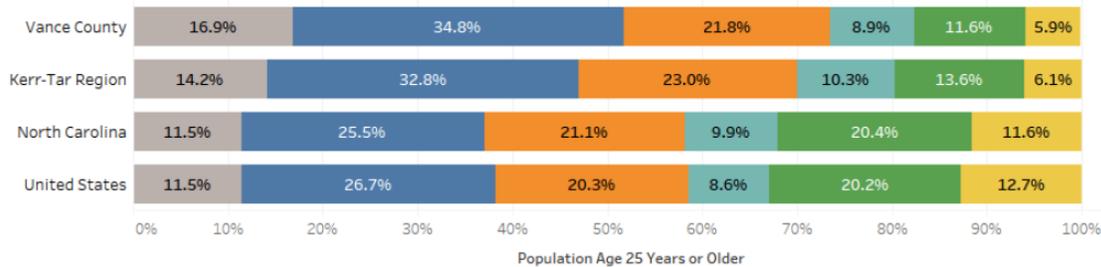
Housing Stock

Housing Units, 2020

Category	Vance County	Kerr-Tar Region	North Carolina	United States
Housing Units	19,276	102,441	4,708,710	140,498,736
% Occupied	88%	88%	88%	90%
% Vacant	12%	12%	12%	10%

Educational Attainment

Educational Attainment, 2020²



Employment & Wages

Vance County Top Employers, 2021⁴

Company Name	Industry	Employment
Variety Wholesalers Inc	Transp/Warehousing	500-999
Wal-Mart Associates Inc.	Transp/Warehousing	500-999
Vance County Schools	Educational Services	500-999
Dlp Person Memorial Hospital	Health Care/Social	500-999
County Of Vance	Public Administration	250-499
Vance Granville Community College	Educational Services	250-499
Ardagh Glass Inc	Manufacturing	250-499
City Of Henderson	Public Administration	100-249
M R Williams Inc	Wholesale Trade	100-249
United Call Center Solutions Llc	Professional Services	100-249

14,993

**Average Employment⁵
Vance County, 2021**

\$40,675

**Average Wage⁵
Vance County, 2020**

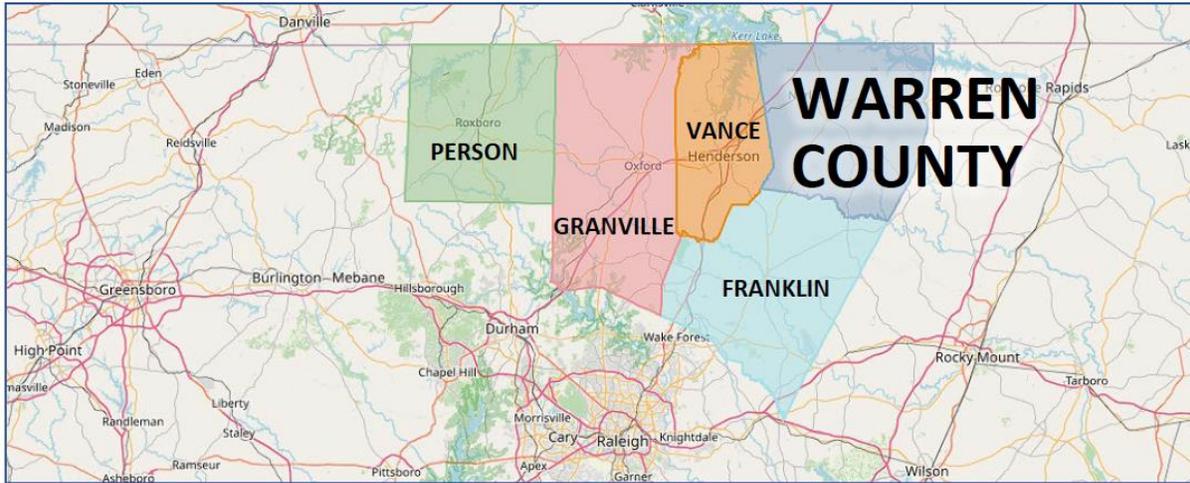
¹ Source: U.S. Census Bureau, 2020 Census

² Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Kerr-Tar Region Income from ESRI

³ Source: ESRI

⁴ Source: NC Department of Commerce Labor and Economic Analysis Dept, Based on Quarterly Census of Employment and Wages 2021 Q4

⁵ Source: JobsEQ



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Warren County	19,913	20,987	5.4%	18,598	-11.4%	18,762	-5.6%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Warren County	16,754	-9.9%	15,660	-6.5%	15,055	-3.9%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021¹

Age Group	Warren County		Kerr-Tar Region	
	#	%	#	%
0-9 years	1,730	9.2%	25,775	11.0%
10-19 years	1,945	10.4%	29,021	12.4%
20-29 years	1,936	10.3%	27,029	11.6%
30-39 years	1,977	10.5%	27,644	11.8%
40-49 years	1,956	10.4%	28,111	12.0%
50-59 years	2,580	13.8%	34,004	14.5%
60-69 years	3,235	17.2%	32,437	13.9%
70-79 years	2,280	12.2%	20,526	8.8%
80+ years	1,123	6.0%	9,216	3.9%

Income

Median Income

Category	Warren County	Kerr-Tar Region*	North Carolina	United States
2020 Median Household Income ²	\$37,476	\$52,160	\$56,642	\$64,994
2022 Median Disposable Income ³	\$39,338	\$48,262	\$52,061	\$58,350

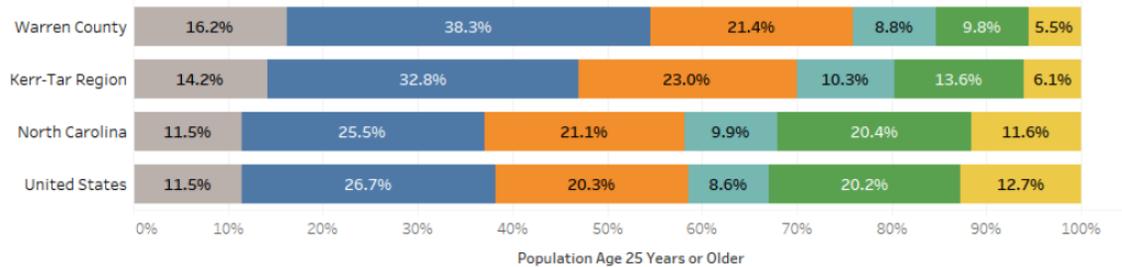
Housing Stock

Housing Units, 2020

Category	Warren County	Kerr-Tar Region	North Carolina	United States
Housing Units	11,309	102,441	4,708,710	140,498,736
% Occupied	70%	88%	88%	90%
% Vacant	30%	12%	12%	10%

Educational Attainment

Educational Attainment, 2020²



Employment & Wages

Warren County Top Employers, 2021⁴

Company Name	Industry	Employment
Warren County Schools	Educational Services	250-499
Dept Of Public Safety	Public Administration	250-499
County Of Warren	Public Administration	250-499
Glen Raven Inc	Manufacturing	100-249
Food Lion	Retail Trade	100-249
Comfort Of Home Care Agency	Health Care/Social	50-99
Cast Stone Systems Inc	Manufacturing	50-99
Smoke House Lumber Company	Manufacturing	50-99
The Pointe Cafe Llc	Food Services	50-99
Elberta Crate & Box Co	Manufacturing	Below 50

3,556

**Average Employment⁵
Warren County, 2021**

\$34,824

**Average Wage⁵
Warren County, 2020**

¹ Source: U.S. Census Bureau, 2020 Census

² Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Kerr-Tar Region Income from ESRI

³ Source: ESRI

⁴ Source: NC Department of Commerce Labor and Economic Analysis Dept, Based on Quarterly Census of Employment and Wages 2021 Q4

⁵ Source: JobsEQ

SUMMARY OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis is an essential part of the development of any strategic economic development plan for several reasons. It allows for wide participation in the process, creates a sense of ownership in the final product, and identifies areas, both positive and negative, for future focus. The data gathered during the SWOT Analysis was utilized in constructing the recommendations and action steps found later in the report.

Information for the analysis was gathered from local leaders from various sectors of the region: government, business, community, and others. A strong effort was made to include all aspects of the region, especially those who are typically underrepresented in efforts such as this one. It is important to solicit information from as many different perspectives as possible

in order to arrive at Kerr Tar’s true state in terms of economic and community development and ensure diversity of thought and experience.

The data was gathered through focus groups, interviews, and an on-line survey. There were six focus groups, the CEDS Committee and one from each county. The local economic developers were asked to submit names for their county focus groups, and to include as wide a cross section of their communities as possible. County economic developers also identified individuals for interviews to supplement the information gathered during the focus group sessions. The responses indicate what participants believe is important about the community as well as what challenges must be overcome to realize the desired growth, both economic and quality of life. Opinions of various aspects of economic development were also solicited.

As with the analysis of any data, the consulting team was searching for dominant themes and trends that ran throughout the responses, and several were found. Recommendations and their corresponding implementation/action steps were developed for what were deemed to be those that would have the most impact, both in advancing the positive and mitigating, or even eliminating the negative on the Region’s economic development efforts. The impacts of these items are short, medium, and long term. In the case of those items which are medium and long term, the sooner strategies are put into place to address the respective issues, the sooner the rewards will be realized, or a negative situation can be diminished or eliminated.

The results below are what the consulting team believes are the salient points of the SWOT Analysis. The items listed are those that are common regionwide.

STRENGTHS

Top strengths identified were:

- Location – rural environment in close proximity to urban amenities, a “Mayberry” feel in many communities



- Uptowns/Downtowns – several across the region have experienced a revitalization and developed the attractions and amenities to draw people and especially young professionals.



- Developable land – there is an abundance of land that could be developed for industrial or commercial use.
- Higher education options/support – the local community colleges and proximity to the universities provide the area with many educational options for developing a desirable labor pool. Additionally, the support given by Vance-Granville and Piedmont Community Colleges via their training services for new and expanding industries is an asset in business attraction and small business/entrepreneurial growth.

- Proximity to the Triangle – different from the bullet above in that refers to the ability to draw workforce from the Triangle and conversely, the ability to offer alternative locations for companies considering the Triangle

WEAKNESSES

While being positive overall about the region in general, participants cited the following weaknesses:

- Lack of economic development product – referring to industrial sites and buildings. Lack of product means that an area is not a participant in new business recruitment. Product is the number one site selection factor on which a local area can have the most effect.
- Labor force – the perception is a lack of quality and quantity to supply the needs of existing and potential companies
- Utility capacity/availability – water/sewer/electrical service, lack of vital infrastructure is limiting growth in many areas
- Lack of broadband service – many areas regionwide lack access to broadband service. This is a limiting factor for growth in many sectors: educational, business development, commerce.
- Affordable/available housing – there is a lack of housing stock to meet current and future demand.

OPPORTUNITIES

Opportunities on which the EDD should capitalize were identified as:

- Potential for Agribusiness – the region has a large agricultural production sector which could lend itself to the development of value-added agribusiness opportunities.
- Small business/entrepreneurial development – the elements to support such an effort are well established across the region, and can be enhanced.
- Workforce – available labor within the region and a reasonable commute time, combined with the educational and training resources
- Developable land – again a strength for the region that needs to be capitalized upon.

- Triangle North – a vehicle that could be utilized to house many activities such as product development, marketing, etc.

THREATS

The items that pose the greatest threats to economic growth and prosperity were identified as:

- Proximity to the Triangle – also listed as a strength, the threat here is identified as wage pressure from jobs in the Triangle creating out commuting
- Utilities/broadband – inaction on improvements and expansions in these areas will limit economic development efforts and, consequently growth
- Lack of product – again, failure to develop economic development product will severely limit the ability to attract new companies with their capital investments and job creation
- Lack of preparation for rapid growth. – there is the belief that growth is coming and there needs to be enhanced planning as to how to manage that growth
- Regional cooperation – the perception is that there is a need for improved unity among the counties in terms of advancing the region

When polled on how to prioritize the economic development activities of product of development, marketing, small business/entrepreneurial development, retail development, and existing industry support, the overwhelming response was product development. There is a regional understanding that the EDD is lacking in economic development product and that is where the focus should be placed.

In addition to the focus groups held by SHEDC, the KTRCOG staff conducted an online survey to gather input from community members unable to attend an in-person session and anyone else wishing to offer their input.

Overall, respondents felt the economy of the region has improved over the past five years and will continue to improve and strongly agree that the cost of living in the region is desirable. However, nearly all felt the region had room for improvement for more employment opportunities and increased wage levels, as well as additional quality and affordable housing options.

Respondents felt the region would be resilient from a natural or economic disaster standpoint, but felt that success could be hampered by a reliance on a low number of industries, and an aging and inadequate water and sewer system. Recent focus on downtown redevelopment and growth as a tourism destination offer sustainable options.

As noted, the data gathered during the SWOT exercise provided valuable insight and information that was incorporated into the recommendations and implementation items, which are the product of the strategic planning process. At Attachment A are the SWOT questions/topics of discussion. The complete results of the SWOT Analysis are contained at Appendix B.

RECOMMENDATIONS – GOALS AND OBJECTIVES

During the last five years CEDS period, the COG has made significant strides and admirable progress toward enhancing economic development potential in the EDD. This has included:

- The Council of Governments has hosted two (2) Regional Summits on the topics on economic development and reimagining tomorrow’s workforce today. Both Summits had panelists and featured a keynote.
- To date, the Council of Governments has issued one (1) loan to a lawn care service in the amount of \$10,000 under the Micro-Enterprise Loan Fund program.
- Since 2017, the Council of Governments has issued nine (9) loans under the Revolving Loan Fund Program totaling, \$961,564.94
- Under the EDA CARES Act Revolving Loan Fund program, began in 2020, the Council of Governments issued 16 loans totaling \$788,625.14 and 103 jobs saved as a result of funding to small businesses located in the Kerr-Tar region.
- Facilitated Diversity, Equity, and Inclusion Trainings to member governments in the region in 2021. Training was provided courtesy a grant received from Duke Energy.
- The Kerr-Tar region continues to serve as an administrator of the Visit NC Farms mobile app, where local area farm to table restaurants, farm stays, farmers markets, and various agricultural-themed events unique to the region are highlighted.
- Acquired a new 5,382 sq ft. office building located in close proximity to Downtown Henderson to serve as a new NCWorks Career Center.
- The Council of Governments is in the process of establishing a Reentry Council through the Kerr-Tar Reentry Roundtable, to serve the needs of individuals formally incarcerated with expungement clinics and resource fairs.

- The Kerr-Tar Area Agency on Aging (AAA) provides planning and support of region Senior Games annually.
- The Kerr-Tar AAA conducts health and wellness classes at three community centers and the Henderson YMCA.
- The Kerr-Tar AAA partners with the faith-based community to provide meals, vaccine support, family caregiver support and diabetes education to our regions senior population.
- The Kerr-Tar AAA partners with local businesses and volunteer organizations to provide accessibly ramps to homeowners.
- The Kerr-Tar Council of Governments administers two housing rehabilitation programs for homeowners of single-family residences from funding received through the North Carolina Housing Finance Agency.

The following are the consulting team’s recommendations based on the information received and analysis performed during the research for this plan, economic development best practices, consultation with the COG staff, and our partner’s expertise in these areas. The recommendations are with a EDD area-wide perspective, with each having impact and benefits for the region as well as all its constituent units of government.

The core mission of economic development should be to increase the wealth of the service area and its citizens, which in turn enhances the quality of life and wellbeing of all concerned. The mission statement of the KTRCOG is “To be a resource of support and services for the constituent members of the Kerr Tar Regional Council of Governments which will enhance economic development potentials for the region and, thereby Improve the quality of life and wellbeing of all citizens.” The KTRCOG has been heavily involved in economic development providing critical support and services, true to its mission statement and aligned with the core mission of economic development.

These recommended goals and objectives will shape the efforts and direction of the organization for the next five years, and even beyond. Economic development is a never-ending process, and programs instituted today will have ripple effects that resonate across time and can have impact many years in the future. The number of recommendations and action steps do not allow for their implementation in any one year. Further, as some are long-term and some that will be on-going, SHEDC suggests that the COG Board and staff thoroughly review and discuss the recommendations and select items for annual plans of work based on organizational goals, those that have the most critical needs, and those that have the highest and most immediate potential for a positive return on investment. Further, we recommend that the Board and staff hold an annual retreat to review progress and develop the work plan for the following year.

- Enhance the Economic Development Product Inventory
 - Compile a comprehensive regional list of available sites and buildings and their state of readiness.
 - Obtain data from the Department of Commerce and the EDPNC as to site and building size for successful project locations.
 - Compare the data with existing economic development stock and identify needs for development.
 - Perform a regionwide site identification and evaluation of potential industrial sites and identify sites for further action.
 - Contact private sector site and shell building developers to explore public-partnership opportunities.

- Promote Small Business/Entrepreneurial Development
 - Build on the success of the COG small business loan program by publicizing success stories and holding informational sessions.
 - Research and identify additional grant and other funding sources to support small business and entrepreneurial development.
 - Identify organizations and agencies that support and promote small business and entrepreneurial development.
 - Convene a summit of small business owners and entrepreneurs to identify needs and resources to foster their growth and to establish a mentoring network.
 - Convene a meeting with all allies which support small business and entrepreneurial development, i.e., Community College Small Business Centers, Small Business and Technology Development Center, etc. to discuss initiative and to catalog a list of services for marketing purposes.

- Support Downtown Revitalization

- Identify downtowns that have been successful in revitalization efforts and perform a best practices analysis
- Identify downtown areas in the region which have the potential and desire for revitalization and convene a meeting to present the best practices analysis results.



- Identify grant and other funding sources that support revitalization activities and efforts.
- Identify private sector developers with experience in downtown revitalization.
- Convene a summit of representatives of the downtown areas and private developers to discuss opportunities for collaborations.

- Initiate a Branding/Marketing Program

- Convene a regional meeting to discuss a branding and marketing plan.
- Identify funding sources to support the project.
- Identify companies that provide branding and marketing services and issue an RFP.
- Select and engage company and initiate the project.

- Engage in Labor Force Enhancements

- Thoroughly review the demographic data included in this report to identify weakness and threats i.e., declining populations in the prime workforce age cohorts, commuting patterns both out and in, etc.

- Survey existing industry to identify current and future needs both in numbers and skill sets and levels.
- Convene a meeting of all labor force allies in the region to discuss the results of the existing industry survey.
- Identify resources to support the enhancement initiative.
- Identify underserved, underrepresented, and non-traditional population sectors for inclusion in enhancement programs i.e., Latino, veterans, disabled, prisoners, etc.
- Promote enhancement initiatives to existing industry and development marketing materials for new industry recruitment.
- Promote Niche Economic Development Strategies
 - Identify niche businesses that exist in the region e.g., agribusiness model in Warren County.
 - Research other regions with similar assets to identify any niche businesses that would be a fit.
 - Provide access to small business/entrepreneurial development resources to facilitate replication of niche businesses in other areas of the region.
- Enhance Recreational Assets
 - Create a regional inventory of all recreational venues and activities.
 - Convene a meeting of regional tourism directors to discuss recreational venues and activities and identify areas for enhancements and new initiatives.



- Market identified opportunities to private developers who operate in the recreational sector.
- Identify funding sources to support public led initiatives.



- Leverage Existing Industry
 - Partner with local economic developers to create a regional Business Retention and Expansion (BRE) program.
 - Create and distribute a questionnaire to existing industry to determine needs, threats, potential for growth, obstacles to that growth, vendors and suppliers, etc.
 - Establish a visitation team and schedule.
 - Host periodic existing industry meetings focused on topics of interest i.e., new educational programs, capabilities, legislative information, etc.
 - Hold annual appreciation events.

- Revitalize Triangle North

- Convene a meeting of all regional economic development partners to discuss the current status of Triangle North and next steps.
- Consider housing the Branding and Marketing Goal outlined above under the auspices of Triangle North.



- Consider housing the Product Development Goal outlined above under the auspices of Triangle North.

- Consider housing the Regional BRE program outlined above under the auspices of Triangle North.
- Identify other programs or economic development initiatives that would be logically and practically implement under the auspices of Triangle North.

The CEDS guidelines call for an implementation schedule for the stated Goals and Objectives. However, as noted above, the multiple Goals and their implementation action step Objectives will necessarily occur over time. Further, the order in which they are undertaken may need to be adjusted with changing conditions or needs. SHEDC believes that rather than setting a schedule for implementation of all the Goals, it would be more prudent for the board and staff to hold annual planning sessions to develop a plan of work for the following year. In years two and beyond the session would evaluate progress from the previous year's plan of work as well.

PERFORMANCE TRACKING MATRIX

The matrix that follows is provided to facilitate tracking performance in the accomplishment of the stated Goals. Utilization of the matrix will assist the COG in meeting the guideline requirements for measurement of progress in the implementation of the CEDS.

Recommendation Category	Action Steps	Timeframe for Completion								
		Year 1	Year 2	Year 3	Year 4	Year 5	On-going			
Product Development	<p>Compile comprehensive regional list of available sites and buildings with their state of readiness.</p> <p>Obtain data from the Department of Commerce and the EDPNC as to site and building size for successful project locations.</p> <p>Compare data with existing economic development stock and identify needs for development.</p> <p>Perform region-wide site identification and evaluation of potential industrial sites and identify sites for further action.</p> <p>Contact private sector site and shell building developers to explore public-private partnership opportunities.</p>									
Small Business/Entrepreneurial Development	<p>Build on success of COG small business loan program by publicizing success stories and holding informational sessions.</p> <p>Research and identify additional grant and other funding sources to support small business and entrepreneurial development.</p> <p>Identify organizations and agencies that support and promote small business and entrepreneurial development.</p> <p>Convene a summit of small business owners and entrepreneurs to identify needs and resources to foster their growth and to establish a mentoring network.</p> <p>Convene a meeting with all allies that support small business and entrepreneurial development.</p>									

Recommendation Category	Action Steps	Timeframe for Completion					
		Year 1	Year 2	Year 3	Year 4	Year 5	On-going
Downtown Revitalization	Identify downtowns that have been successful in revitalization efforts and perform a best practices analysis.						
	Identify downtown areas in region with the potential and desire for revitalization and convene meeting to present best practices analysis results.						
	Identify grant and other funding sources that support revitalization activities and efforts.						
	Identify private sector developers with experience in downtown revitalization.						
	Convene a summit of representatives of the downtown areas and private developers to discuss opportunities for collaborations.						
Branding/Marketing Program	Convene regional meeting to discuss a branding and marketing plan.						
	Identify funding sources to support the project.						
	Identify companies that provide branding and marketing services and issue an RFP.						
	Select and engage company and initiate project.						

Recommendation Category	Action Steps	Timeframe for Completion					
		Year 1	Year 2	Year 3	Year 4	Year 5	On-going
Labor Force Enhancements	Review demographic data to identify weaknesses and threats.						
	Survey existing industry to identify current and future needs in terms of numbers and skill sets and levels.						
	Convene a meeting of all labor force allies in the region to discuss results of existing industry survey.						
	Identify resources to support the enhancement initiative.						
	Identify underserved, underrepresented, and non-traditional population sectors for inclusion in enhancement programs.						
	Promote enhancement initiatives to existing industry and develop marketing materials for new industry recruitment.						
Promotion of Niche Economic Development Strategies	Identify niche businesses that exist in the region.						
	Research other regions with similar assets to identify other niche businesses that would be a fit.						
	Provide access to small business/entrepreneurial development resources to facilitate replication of niche businesses in other areas of the region.						

Recommendations Category	Action Steps	Timeframe for Completion					
		Year 1	Year 2	Year 3	Year 4	Year 5	On-going
Recreational Enhancements	Create regional inventory of all recreational venues and activities.						
	Convene meeting of regional tourism directors to discuss recreational venues and activities and identify areas for enhancements and new initiatives.						
	Market identified opportunities to private developers who operated in the recreational sector.						
	Identify funding sources to support public led initiatives.						
Leverage Existing Industry	Partner with local economic developers to create a regional Business Retention and Expansion (BRE) program						
	Create and distribute a questionnaire to existing industry to determine needs, threats, potential for growth, obstacles to that growth, vendors and suppliers, etc.						
	Establish a visitation team and schedule.						
	Host periodic existing industry meetings focused on topics of interest, i.e., new educational programs, capabilities, legislative information, etc.						
Triangle North	Hold annual appreciation events.						
	Convene meeting of all regional economic development partners to discuss the current status of Triangle North and next steps.						

CONCLUSION

The COG has had a strong history of economic development and community development leadership in the EDD, particularly in the past five years pursuant to the previous CEDS. This has provided a strong base on which to build into the future.

The CEDS report now being provided builds upon those past gains, with goals for the next five-year period, which when implemented successfully, will positively impact the economic development potential for the COG's EDD and the local government constituencies of the COG.

The next challenges is to successfully implement the goals set forth herein. To that end, it is strongly recommended that every year, starting in 2023, the COG should convene a planning session to set forth specific objectives for the next year in order to work toward the goals set forth herein. Those annual planning sessions should be professionally facilitated and be conducted in a way to maintain a collective focus among the COG and its constituent partners toward accomplishing all the goals in the CEDS.

As stated previously in this CEDS report, in implementing these goals, the COG EDD will be:

Building on a Strong Past, Focused on an Extraordinary Future

ATTACHMENT A

KTRCOG CEDS SWOT Questionnaire

1. List three of the county's major strengths in competing for new and locally expanding business.
2. Name three major weaknesses that work against development.
3. Name one opportunity that the county should capitalize on.
4. What is one (or multiple) threats to growth?
5. To what does Kerr-Tar owe its success over the last five years?
Its failures?
6. What key investments should be made to foster economic development and growth?
7. What should be the county's economic development priorities?
(Please rank 1,2,3...)
 - a. Marketing for business recruitment
 - b. Business Park/Site Development/Product Development
 - c. Small Business/Entrepreneurial Development
 - d. Retail Development
 - e. Existing Industry Support
 - f. Other

ATTACHMENT B

KTCOG CEDS Steering Committee Meeting
Tuesday, July 19, 2022 – 10:30am
SWOT Analysis Input

STRENGTHS

Regional Co-operation (about some things but not others)
Well-connected Workforce network
Highway Access (I-85 and other)
Higher Education facilities and programs (Community College) and proximity to RTP Universities
Quality of Life
Rural Environment w/ proximity to Urban amenities
Green Space
Lake
Healthcare Access
Natural Resources – Land and Water
Regional Water System – Expansion planned for additional 10mgd (for total of 20mgd)
Industrial megasite with dual-served power
Network of community groups providing human services (Aging was noted in particular)
Small town downtowns - cool factor
DEI – Group felt there was diversity of the population and not just race. Generational, skill levels, etc

WEAKNESSES

No Natural Gas on one of the primary industrial areas
DEI – Lack of Generational and Cultural amenities
K-12 Education
Lack of Workforce Housing
Labor Availability
Wage differential for same job in RTP – much lower
Passing drug-testing
Shifting workforce and workplace cultures and adaptation by both sides – employer and employee
Unhealthy population (found out later this was “code” for recent gun violence incidents)
Public Transportation
Education (about governing) of elected officials
Resistance to Growth / Change
Lack of leadership at local level by business executives at the next level above local manager

OPPORTUNITIES

Marketing of Quality-of-Life Assets
Outdoor Recreation opportunities
Small Downtowns
Proposed S-Line (Commuter rail project from RTP to Washington DC)

Possible Transit Oriented Development (for drawing young people to the region)
Further expansion of water system
Education of Government leaders (about leading/governing)
Land capacity
Growing population (in some areas)
Local leadership
Triangle North (but some debate about if the “Triangle” piece of name is a good or bad connection)
Potential for Ag business / food related activity
Small Business Revolving Loan Fund is available thru the CoG

THREATS

Gradients of Change between counties – Some growing faster than others – challenges regional unity
Perception of the region / lack of regional identity

OTHER

Regional broadband – an issue some places but not regionwide
Working with DOT – region has two MPOs
Workforce issues post COVID
Site / building creation
Funding for promoting job fairs
COG support for funding applications is very good

7/21/22 FRANKLIN COUNTY FOCUS GROUP

✓ INDICATES NON-AGREEMENT FOR FRANKLIN COUNTY

KTCOG CEDS Steering Committee Meeting
Tuesday, July 19, 2022 – 10:30am
SWOT Analysis Input

✓ STRENGTHS

- Regional Co-operation (about some things but not others)
- ? ✓ Well-connected Workforce network
- Highway Access (I-85 and other)
- Higher Education facilities and programs (Community College) and proximity to RTP Universities
- Quality of Life
 - Rural Environment w/ proximity to Urban amenities
- ? Green Space -
 - Lake
- ? Healthcare Access
- Natural Resources – Land and Water
 - ✓ Regional Water System – Expansion planned for additional 10mgd (for total of 20mgd) ?
- ? ✓ Industrial megasite with dual-served power (have one)
- ? Network of community groups providing human services (Aging was noted in particular)
- Small town downtowns - cool factor
- ? DEI – Group felt there was diversity of the population and not just race. Generational, skill levels, etc

WEAKNESSES

- No Natural Gas on one of the primary industrial areas
- DEI – Lack of Generational and Cultural amenities
- ✓ K-12 Education
 - Lack of Workforce Housing
 - Labor Availability
 - Wage differential for same job in RTP – much lower
 - Passing drug-testing
 - Shifting workforce and workplace cultures and adaptation by both sides – employer and employee
- ✓ ~~Unhealthy population~~ ^{PUBLIC SAFETY} (found out later this was “code” for recent gun violence incidents)
- Public Transportation
- Education (about governing) of elected officials
- ? Resistance to Growth / Change
- ✓ Lack of leadership at local level by business executives at the next level above local manager
NON RESIDENT EXECUTIVES

OPPORTUNITIES

- Marketing of Quality-of-Life Assets
- Outdoor Recreation opportunities
- Small Downtowns
- Proposed S-Line (Commuter rail project from RTP to Washington DC)

Possible Transit Oriented Development (for drawing young people to the region)

Further expansion of water system

Education of Government leaders (about leading/governing)

7. Land capacity *willing sellers?*

Growing population (in some areas) .

Local leadership

Triangle North (but some debate about if the "Triangle" piece of name is a good or bad connection)

Potential for Ag business / food related activity .

Small Business Revolving Loan Fund is available thru the CoG

THREATS

Gradients of Change between counties – Some growing faster than others – challenges regional unity
Perception of the region / lack of regional identity

OTHER

Regional broadband – an issue some places but not regionwide

Working with DOT – region has two MPOs

Workforce issues post COVID

Site / building creation

Funding for promoting job fairs

COG support for funding applications is very good

KTCOG Franklin County Focus Group Meeting

SWOT Analysis

Thursday, July 21, 2022 – 10:30-Noon

STRENGTHS

- Growth – population, income
- Housing availability
- Downtown development
- Evolving mindset to growth
- Agriculture Opportunities
- Affordability of housing, property
- Proximity to the Triangle
- Fiscally sound government
- Transportation corridor
- Workforce diversity
- General aviation airport
- Broadband
- K-12 Education

WEAKNESSES

- Lack of hanger space at the airport
- Lack of industrial product for economic development
- Infrastructure – all
- Amenities – lack of greenway connectivity to community, recreational facilities
- Aging population
- Transportation – 4 lane highways
- Disconnect between training and workforce
- Lack of labor force
- Lack of retail and hospitality venues – large meeting space

OPPORTUNITIES

- Infrastructure extensions/expansion including broadband
- Healthcare expansion and access
- Economic uplift – first time home owners, population diversity
- Agricultural diversification
- Small business/entrepreneurship
- Louisburg co-working space
- Youngsville co-working space

- Available downtown buildings
- Private investor network
- New PIO (county) capacity-marketing, managing our message
- Tourism
- Economic development while preserving natural resources of river basins

THREATS

- Disconnect between communities
- Outmigration of talent
- Misinformation/disinformation
- Utilities capacities – not within local control – water, sewer, natural gas
- Loss of farmland to housing development
- Watershed rules for three river basins
- Rising income equality

ECONOMIC DEVELOPMENT PRIORITIES

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
Marketing for business recruitment	2	7	1		2	
Business Park/Site Development/Product Development	8	3	1			
Small Business/Entrepreneurial Development			3	7	1	
Retail Development			3	1	4	3
Existing Industry Support	2	2	3	2	3	

KTCOG CEDS Steering Committee Meeting
Tuesday, July 19, 2022 – 10:30am
SWOT Analysis input

VANCE COUNTY Focus Group meeting

Tuesday, July 19, 2022 – 3:30pm

(NOTE: Vance County attendees reacted to Steering Committee inputs and provided input from Vance perspectives. Those are noted in RED)

STRENGTHS

Regional Co-operation (about some things but not others)

Well-connected Workforce network

Highway Access (I-85 and other)

Higher Education facilities and programs (Community College) and proximity to RTP Universities

Quality of Life

Rural Environment w/ proximity to Urban amenities

Green Space

Lake

Healthcare Access

Cost of Living

Natural Resources – Land and Water

Regional Water System – Expansion planned for additional 10mgd (for total of 20mgd)

Industrial megasite with dual-served power

Network of community groups providing human services (Aging was noted in particular)

Small town downtowns - cool factor

DEI – Group felt there was diversity of the population and not just race. Generational, skill levels, etc

WEAKNESSES

No Natural Gas on one of the primary industrial areas

DEI – Lack of Generational and Cultural amenities

K-12 Education

Lack of Workforce Housing

Labor Availability

Wage differential for same job in RTP – much lower

Passing drug-testing

Shifting workforce and workplace cultures and adaptation by both sides – employer and employee

Unhealthy population (found out later this was “code” for recent gun violence incidents)

Public Transportation

Education (about governing) of elected officials

Resistance to Growth / Change

Lack of leadership at local level by business executives at the next level above local manager

Broadband in some areas

OPPORTUNITIES

Marketing of Quality-of-Life Assets

Vance group agreed with this

Outdoor Recreation opportunities

Small Downtowns

Proposed S-Line (Commuter rail project from RTP to Washington DC)

Possible Transit Oriented Development (for drawing young people to the region)

Vance group agreed with this as the line would come through Henderson

Further expansion of water system

Vance group agreed with this as Henderson controls the system

Education of Government leaders (about leading/governing)

Land capacity

Growing population (in some areas)

Local leadership

Triangle North (but some debate about if the "Triangle" piece of name is a good or bad connection)

Potential for Ag business / food related activity

Small Business Revolving Loan Fund is available thru the CoG

THREATS

Gradients of Change between counties – Some growing faster than others – challenges regional unity

Perception of the region / lack of regional identity

Vance group agreed with this with comment "what is the value of the region to the local areas

Vacant Housing was added to the list

OTHER

Regional broadband – an issue some places but not regionwide

Working with DOT – region has two MPOs

Workforce issues post COVID

Site / building creation

Funding for promoting job fairs

CoG support for funding applications is very good

Combining all the local EDCs into a single entity got a lot of discussion

Vance group felt they needed another single-family housing sub-division

To the question "If money was no issue, where would you spend it?", responses included:

Airport

Water/Sewer

Site/Building product

Secondary Roads

Ag Business

KTCOG Person County Focus Group Meeting

SWOT Analysis

Thursday, July 28, 2022 – 3:30-5:00

STRENGTHS

- Abundant water
- Attractive base/rate
- Location – proximity to the Triangle, Triade (equidistant), and Danville
- Megasite
- Historic Area – Agriculture, Quilt Trail, Tourism
- PCC Main Campus
- Healthcare – excellent
- Uptown Roxboro – Small business growth
- Rail
- Rapid permitting
- Attracting new residents because of unique nature
- Uptown events
- Low crime rate
- US 501 – four lane
- Beautiful countryside
- 2 vineyards
- Culture – “Mayberry feel”
- Media newspaper and radio
- Ports – equidistant between Morehead and Wilmington

WEAKNESSES

- Lack of interstate
- School buildings are old
- Student achievement lacking
- Pockets of broadband absence
- Affordable housing
- Available housing
- Walkability
- Lack of rental property
- Lack of hotels/motels
- Out commuters
- Infrastructure – sewer extension to the southern part of the county
- No infrastructure interconnectivity
- Public transportation

- Industrial sites
- Crime

OPPORTUNITIES

- Keep out commuters employed locally
- Promote proximity to Triangle, Triade, Durham
- Completion of US 501 improvements to VA line
- US 158 connecting the interstates creating a strategic corridor
- Workforce development focusing on youth, partnering with PCC and Workforce Board
- Megasite high wage jobs
- Agriculture – farm to table, Food Hub, Agritourism
- Broadband – need to expand availability
- Pub/Priv Partnerships to extend 5G services – collocation on existing utility poles
- Recruitment of energy sector companies
- Recreational development
- Uptown – Residential-apartment development, business recruitment

THREATS

- Watershed – Neuse in southern part of county
- Loss of jobs and revenues – Duke and other legacy industries closing operations
- Wage disparities – Person vs Wake
- Available buildings being leased/purchased for WH/DC, low job creators vs manufacturing or other high job creators
- Unwilling sellers – building and land
- NIMBYism
- Aging population/workforce challenge
- Disharmony within the community as to direction/identity
- Change in legislative representation, leadership
- Service demand outpacing capacity

OTHER

ECONOMIC DEVELOPMENT PRIORITIES

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
Marketing for business recruitment	2	7	1		2	
Business Park/Site Development/Product Development	8	3	1			
Small Business/Entrepreneurial Development			3	7	1	
Retail Development			3	1	4	3
Existing Industry Support	2	2	3	2	3	

KTCOG CEDS - Warren County Focus Group

STRENGTHS

Railroad
I-85
Large land supply (resource)
Timberland
Farmland Preservation
Ag Biz
Regional Water System
Positive Business Climate
Lake Gaston
Downtowns
Community College
Strong community attraction but not enough to attract young people
Recent land planning was very inclusive

WEAKNESSES

Wastewater treatment capacity
Limited electric power
Lack of client-ready sites/buildings
Need more broadband
Medical services
Public access to the lake
Housing (options and affordability)
Out-of-Market ownership
K-12 public education (only 1600 students in entire system!)
Lack of skill/trade labor
Losing ground in key demographic areas

THREATS

Solar Farms
S-Line (taking up RoW and land w/o station)
Local wealth distribution
Triangle North option expiring
Saving water capacity

OPPORTUNITIES

Willing sellers (Land)
5-10,000 acres of state-owned land
Good environment for light ind. (wary of heavier ind. due to historical issue (pcbs))
Planning assistance for development
S-Line
Regional water plan
Outdoor Economy
Potential for Commercial activity on lake (need access)
Historic district(s)
Wise interchange
Triangle Norths

Kerr-Tar Regional Council of Governments CEDS
Granville County Focus Group
SWOT analysis

STRENGTHS

Local citizens
I-85
Workforce
Vance-Granville Community College
Natural Resources
Small Businesses
Low Crime Rate – Public safety
Charter Schools
Access to Healthcare
Reasonable priced land
Good utilities
Lower housing costs
Small towns
Regional Partnerships
CTE programs in public schools (incl. apprenticeships)
Recreational opportunities
Destination locations (tourism)
Existing industries expanding (strong local biz climate)

WEAKNESSES

Pockets of poverty (65% of public school students on Free & Reduced lunch)
Charter Schools
Utilities / infrastructure is aging
Lack of diversity / variety for food purchase options
Lack of workforce housing options
Wage/job competition against RTP for same job
Lack of client-ready sites/buildings
Availability of broadband
No overall land use policy
Limited social services – access to childcare; insufficient pre-K
Perceptions and Identity issues – internally and externally
A comprehensive vision
In a DOT transportation division focused on core RTP county needs
Location – proximity to RTP
Marketing / messaging / Branding – internally and externally
Coordination and funding for marketing

OPPORTUNITIES

Partnerships with local companies for childcare
Partnerships with local companies for career pathways
Agri-business incl. food, food related, and pharma production
Recreational opportunities
Small businesses and entrepreneurial growth (incl artists / craftspeople)
Target marketing initiatives
Incentives for small businesses
Control of growth patterns given county is ahead of the anticipated growth
One-stop shop for regulatory directives
For internal messaging, as largest employer, county government employees should be positive messengers
We are sometimes getting in our own way

THREATS

Economic instability
Lack of urgency (to address issues or take positive actions)
Lack of broadband
Need more regional cooperation
Lack of leadership – with a commitment to a vision & plan (reacts to loudest voices)
Not prepared for rapidly changing pace of growth
Loss of students (to other options) affecting funding levels for public K-12
Protection of agricultural and natural resources
A divided county

ATTACHMENT C

KERR-TAR REGIONAL OVERVIEW

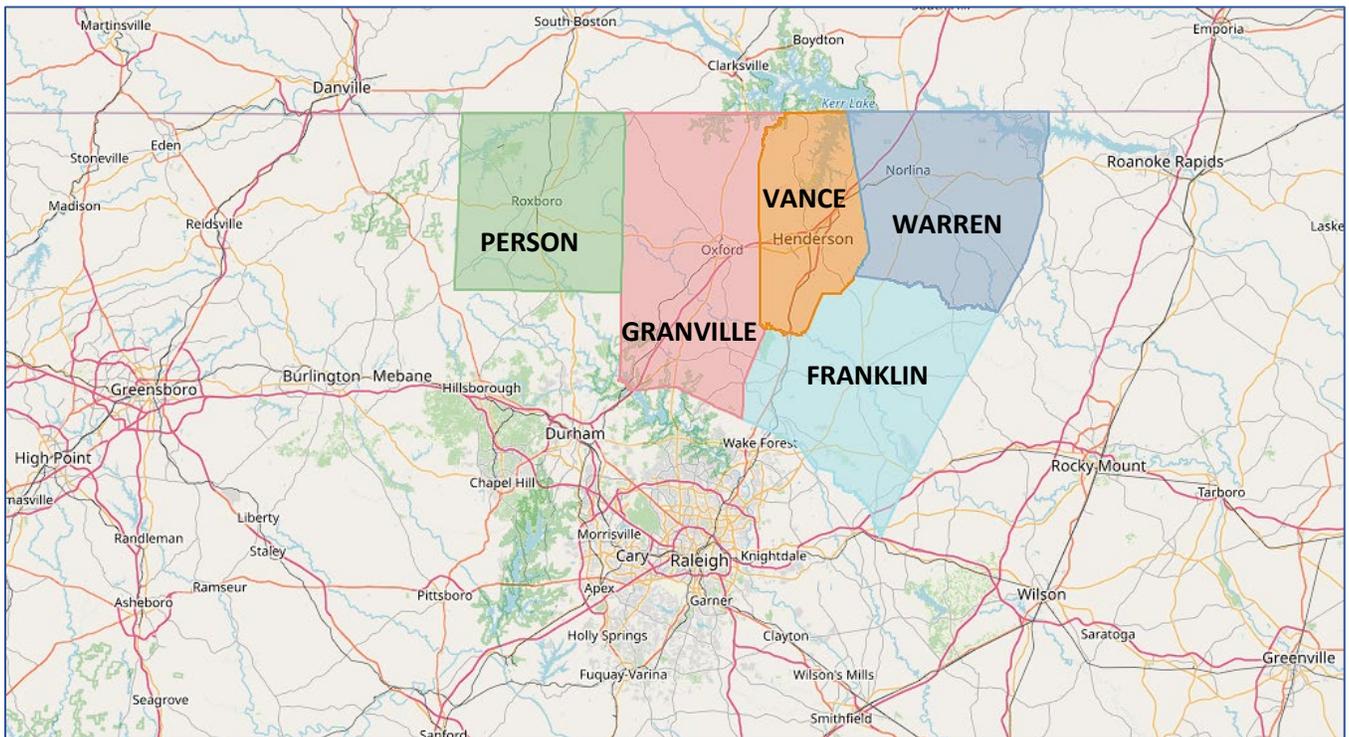
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KERR-TAR REGIONAL OVERVIEW

The Kerr-Tar Council of Governments region consists of five counties, Franklin, Granville, Person, Vance and Warren in northern North Carolina situated between the Research Triangle Region and the Virginia border. Collectively the Kerr-Tar Region is the location of more than 230,000 residents and 65,600 employees as of 2021. This document contains an overview of demographic and economic indicators for the region. In addition to the regional overview, each county is profiled with similar indicators.

Relative Location of the Kerr-Tar 5-County Region

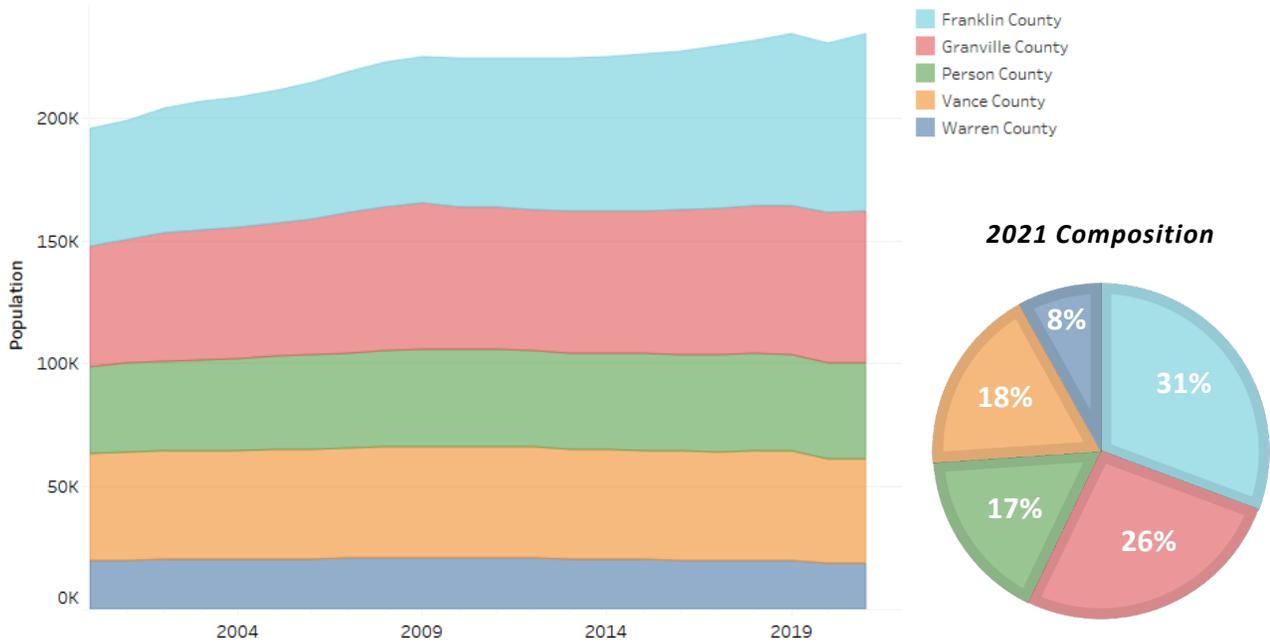


Counties included in the Kerr-Tar Region



Population

Population Change 2000-2021



Population & Population Change 2000-2021

Geography	2000	2010	10-Year Growth	2020	10-Year Growth	2021	5-Year Growth
Franklin County	47,611	60,835	27.8%	69,060	13.5%	71,703	10.9%
Granville County	48,824	57,673	18.1%	61,041	5.8%	61,986	5.6%
Person County	35,759	39,411	10.2%	39,146	-0.7%	39,127	-0.4%
Vance County	43,159	45,289	4.9%	42,529	-6.1%	42,185	-5.2%
Warren County	19,913	20,987	5.4%	18,598	-11.4%	18,762	-5.6%
Kerr-Tar Region	195,266	224,195	14.8%	230,374	2.8%	233,763	3.0%
North Carolina	8,081,614	9,574,323	18.5%	10,457,177	9.2%	10,551,162	3.9%
United States	282,162,411	309,321,666	9.6%	331,501,080	7.2%	331,893,745	2.8%

Source: U.S. Census Bureau, Population Estimates

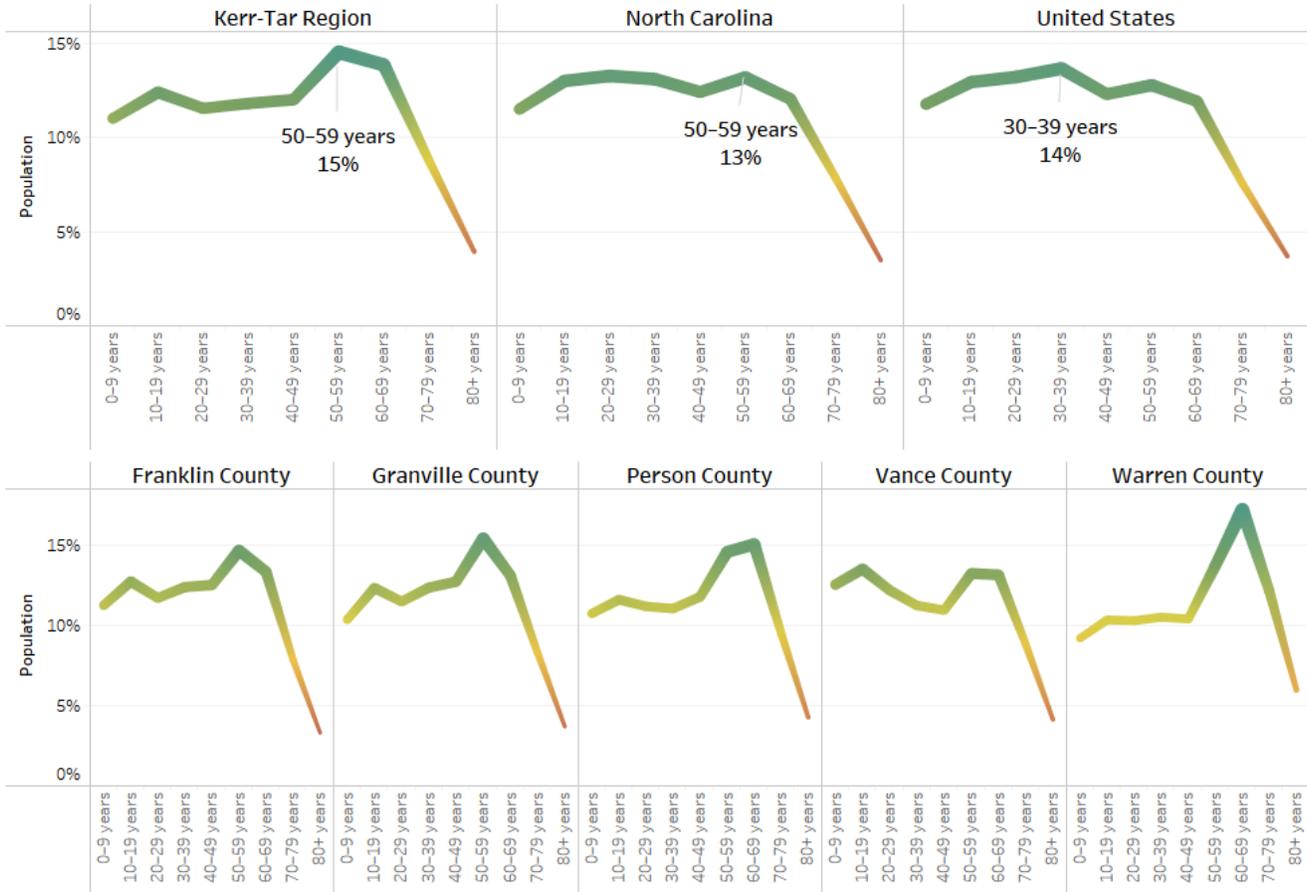
Population Projections

	July 2030	10-Year Change (2020-2030)	July 2040	10-Year Change (2030-2040)	July 2050	10-Year Change (2040-2050)
Franklin County	85,231	23.7%	101,748	19.4%	118,264	16.2%
Granville County	67,636	10.8%	74,620	10.3%	81,601	9.4%
Person County	39,201	0.3%	39,298	0.2%	39,334	0.1%
Vance County	41,204	-2.9%	41,133	-0.2%	41,131	0.0%
Warren County	16,754	-9.9%	15,660	-6.5%	15,055	-3.9%
Kerr-Tar Region	250,026	8.7%	272,459	9.0%	295,385	8.4%
North Carolina	11,527,150	10.2%	12,669,133	9.9%	13,824,955	9.1%

Source: North Carolina OSBM, Population Projections

Age Distribution

Age Distribution, 2021



Source: U.S. Census Bureau, Population Estimates

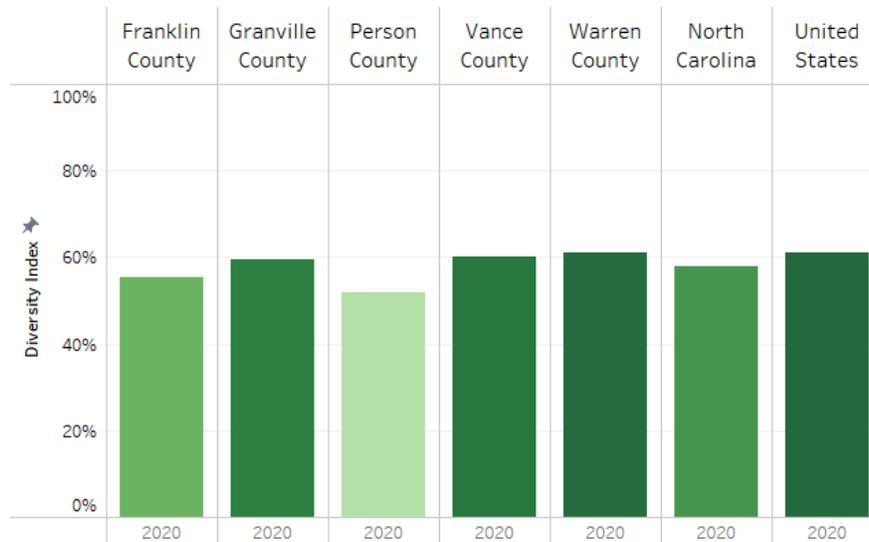
Age Distribution, 2021

Age Group	Franklin County		Granville County		Person County		Vance County		Warren County		Kerr-Tar Region	
	#	%	#	%	#	%	#	%	#	%	#	%
0-9 years	8,090	11.3%	6,439	10.4%	4,213	10.8%	5,303	12.6%	1,730	9.2%	25,775	11.0%
10-19 years	9,150	12.8%	7,661	12.4%	4,551	11.6%	5,714	13.5%	1,945	10.4%	29,021	12.4%
20-29 years	8,416	11.7%	7,138	11.5%	4,386	11.2%	5,153	12.2%	1,936	10.3%	27,029	11.6%
30-39 years	8,906	12.4%	7,676	12.4%	4,333	11.1%	4,752	11.3%	1,977	10.5%	27,644	11.8%
40-49 years	8,995	12.5%	7,908	12.8%	4,622	11.8%	4,630	11.0%	1,956	10.4%	28,111	12.0%
50-59 years	10,536	14.7%	9,574	15.4%	5,718	14.6%	5,596	13.3%	2,580	13.8%	34,004	14.5%
60-69 years	9,594	13.4%	8,144	13.1%	5,904	15.1%	5,560	13.2%	3,235	17.2%	32,437	13.9%
70-79 years	5,642	7.9%	5,149	8.3%	3,726	9.5%	3,729	8.8%	2,280	12.2%	20,526	8.8%
80+ years	2,374	3.3%	2,297	3.7%	1,674	4.3%	1,748	4.1%	1,123	6.0%	9,216	3.9%

Source: U.S. Census Bureau, Population Estimates

Diversity

Diversity Index, 2020



Diversity Index Comparison, 2010-2020

Geography	2010	2020	Change
Franklin County	52.1%	55.5%	3.4%
Granville County	55.6%	59.5%	3.9%
Person County	48.0%	51.8%	3.8%
Vance County	57.4%	60.1%	2.7%
Warren County	57.8%	61.0%	3.2%
North Carolina	52.1%	57.9%	5.8%
United States	54.9%	61.1%	6.2%

The Diversity Index is a continuum that ranges from 0 (no diversity) to 100 (complete diversity), where an area's index tends toward 100 when the population is more evenly divided across race and ethnic groups. The Diversity Index tells us the chance that two people chosen at random will be from different racial and ethnic groups.

Source: U.S. Census Bureau, Decennial Census

Racial & Ethnic Diversity, 2021

Geography	White	Black or African American	American Indian Alaskan Native	Asian	Native Hawaiian Pacific Islander	Two or More Races	Hispanic or Latino*
Franklin County	69.9%	25.8%	1.1%	0.9%	0.1%	2.3%	9.6%
Granville County	64.2%	31.8%	1.0%	0.8%	0.1%	2.1%	9.5%
Person County	69.4%	26.9%	0.9%	0.5%	0.0%	2.3%	5.1%
Vance County	44.3%	52.0%	1.0%	0.9%	0.1%	1.8%	8.7%
Warren County	40.8%	50.3%	6.1%	0.4%	0.0%	2.2%	4.2%
Kerr-Tar Region	61.3%	34.3%	1.4%	0.8%	0.1%	2.1%	8.2%
North Carolina	70.1%	22.3%	1.6%	3.4%	0.1%	2.5%	10.2%
United States	75.8%	13.6%	1.3%	6.1%	0.3%	2.9%	18.9%

Source: U.S. Census Bureau, Population Estimates (*Hispanic or Latino can be of any race)

Households

Households & Families, 2020

Geography	Total Households	% Married-Couple Family	% Single Female Family	% Single Male Family	% Nonfamily Households
Kerr-Tar Region	88,479	48%	16%	5%	31%
North Carolina	4,031,595	48%	13%	4%	35%
United States	122,354,222	48%	12%	5%	35%
Households with own children of the householder under 18 years					
	#	%	%	%	%
Kerr-Tar Region	22,536	25%	15%	8%	n/a
North Carolina	1,084,168	27%	18%	7%	n/a
United States	33,410,645	27%	19%	6%	n/a

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020

Households Statistics, 2020

Category	Kerr-Tar Region	North Carolina	United States
Householder Living Alone	26.7%	28.7%	28.0%
Households With Children Under 18 Years	30.2%	30.3%	30.7%
Households With Persons 60 Years And Over	45.6%	39.5%	40.2%
Type of Housing			
Single Family (1-Unit Structures)	69.8%	70.9%	68.9%
Multi-Family (2-Or-More-Unit Structures)	7.0%	17.4%	25.5%
Mobile Homes And All Other Types Of Units	23.2%	11.7%	5.5%
Home Ownership			
Owner-Occupied Units	71.5%	65.7%	64.4%
Renter-Occupied Units	28.5%	34.3%	35.6%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020

Housing Stock

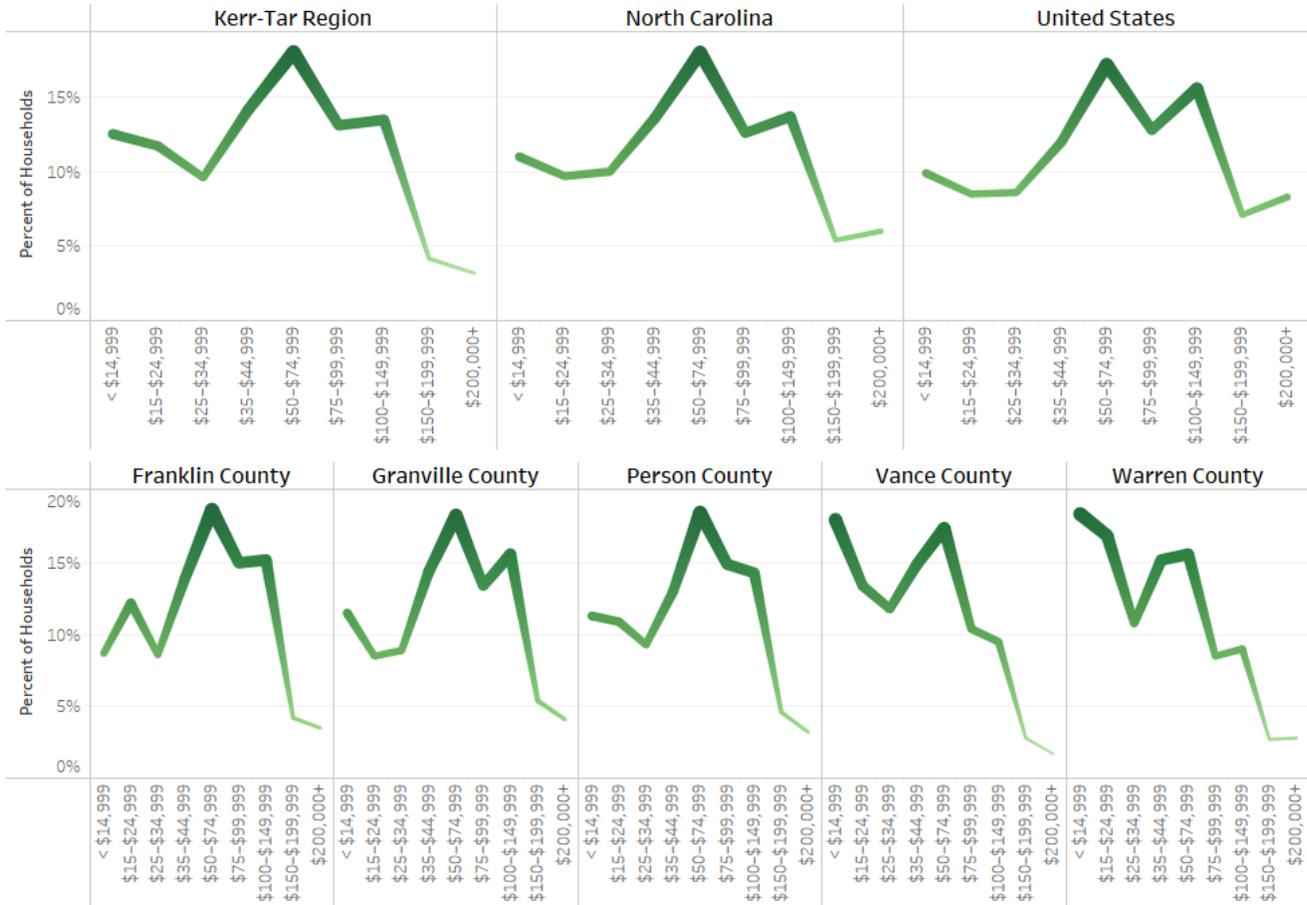
Housing Units, 2020

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region	North Carolina	United States
Housing Units	29,358	24,214	18,284	19,276	11,309	102,441	4,708,710	140,498,736
% Occupied	90%	93%	88%	88%	70%	88%	88%	90%
% Vacant	10%	7%	12%	12%	30%	12%	12%	10%

Source: U.S. Census Bureau, 2020 Census

Household Income

Household Income Distribution, 2020



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020

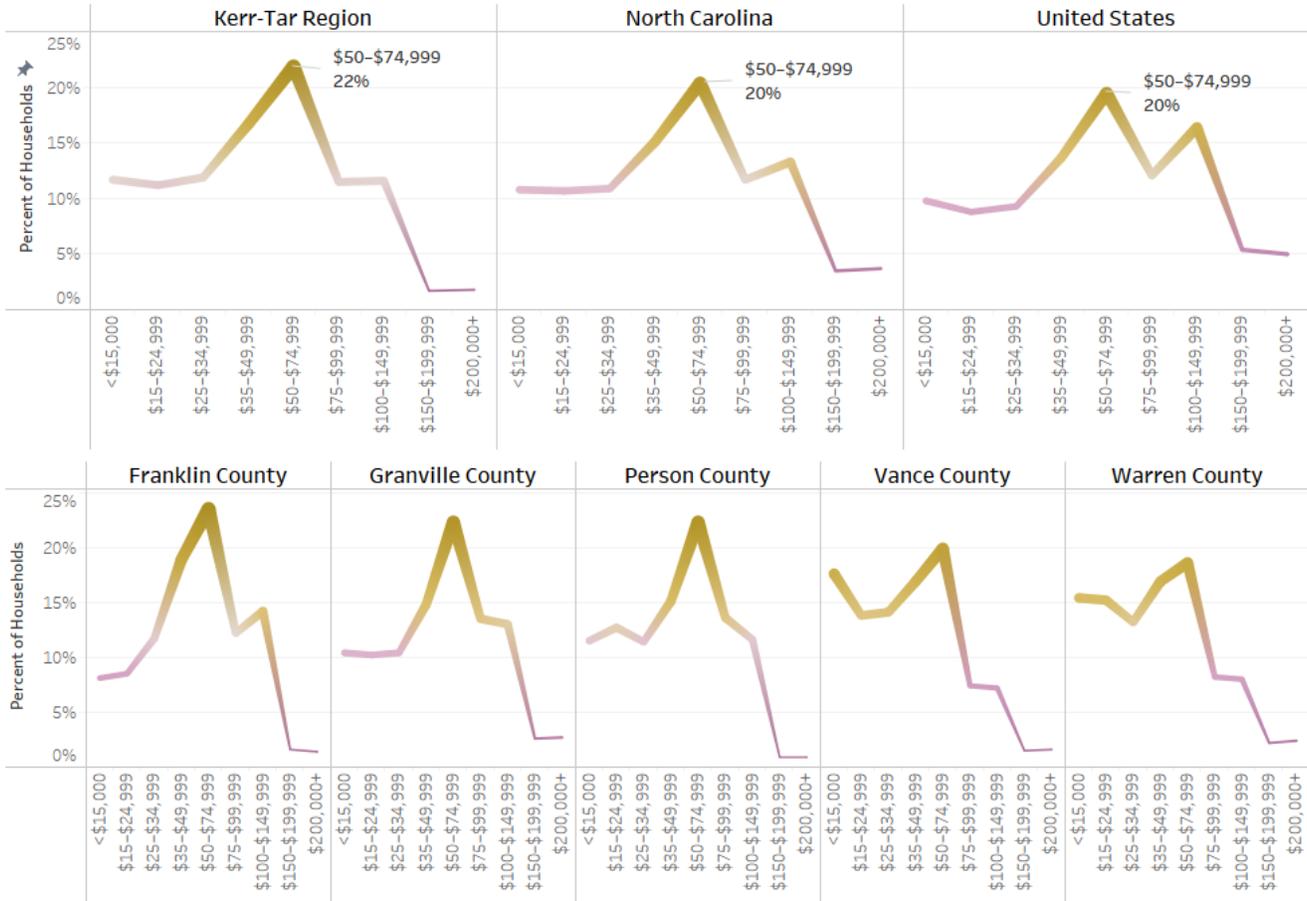
Household Income Distribution, 2020

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region*	North Carolina	United States
\$10-\$14,999	8.7%	11.5%	11.3%	18.0%	18.4%	12.5%	11.0%	9.9%
\$15-\$24,999	12.2%	8.5%	10.9%	13.4%	16.9%	11.7%	9.7%	8.5%
\$25-\$34,999	8.6%	8.9%	9.3%	11.8%	10.8%	9.6%	10.0%	8.6%
\$35-\$44,999	13.9%	14.4%	13.0%	14.9%	15.2%	14.2%	13.6%	12.0%
\$50-\$74,999	18.7%	18.3%	18.5%	17.4%	15.6%	18.0%	18.0%	17.2%
\$75-\$99,999	15.0%	13.4%	14.9%	10.4%	8.5%	13.1%	12.6%	12.8%
\$100-\$149,999	15.2%	15.6%	14.3%	9.5%	9.0%	13.5%	13.7%	15.6%
\$150-\$199,999	4.2%	5.4%	4.6%	2.8%	2.7%	4.2%	5.4%	7.1%
\$200,000+	3.5%	4.1%	3.2%	1.7%	2.8%	3.2%	6.0%	8.3%
Median Income	\$58,172	\$56,924	\$57,323	\$41,827	\$37,476	\$52,160	\$56,642	\$64,994

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020 *Median Household Income from ESRI

Disposable Income

Disposable Income Distribution, 2022



Source: ESRI

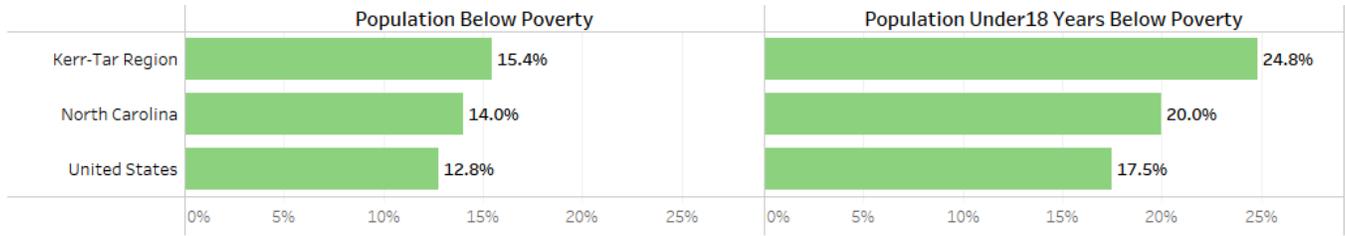
Disposable Income Distribution, 2022

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region	North Carolina	United States
<\$15,000	8.1%	10.4%	11.5%	17.6%	15.4%	11.7%	10.8%	9.8%
\$15-\$24,999	8.5%	10.2%	12.7%	13.8%	15.2%	11.2%	10.7%	8.8%
\$25-\$34,999	11.7%	10.4%	11.4%	14.1%	13.2%	11.9%	10.9%	9.3%
\$35-\$49,999	18.9%	14.8%	15.1%	16.9%	16.9%	16.7%	15.1%	13.7%
\$50-\$74,999	23.5%	22.3%	22.3%	19.9%	18.6%	21.9%	20.4%	19.5%
\$75-\$99,999	12.2%	13.5%	13.6%	7.4%	8.2%	11.5%	11.7%	12.1%
\$100-\$149,999	14.2%	13.0%	11.6%	7.2%	8.0%	11.6%	13.3%	16.4%
\$150-\$199,999	1.6%	2.6%	0.9%	1.5%	2.2%	1.7%	3.5%	5.4%
\$200,000+	1.4%	2.7%	0.9%	1.6%	2.4%	1.8%	3.7%	5.0%
Median Disposable Income	\$51,920	\$53,132	\$49,075	\$38,062	\$39,338	\$48,262	\$52,061	\$58,350

Source: ESRI

Poverty

Poverty, 2020



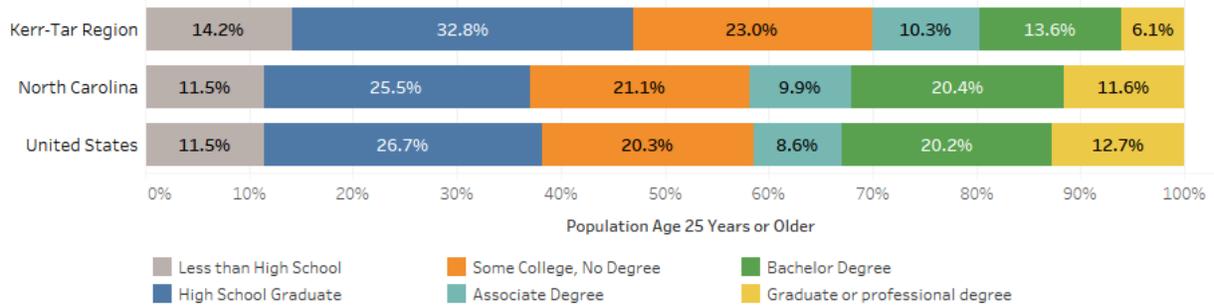
Percent of Population Below Poverty, 2020

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region	North Carolina	United States
Below poverty level	11.4%	14.2%	16.3%	20.0%	20.9%	15.4%	14.0%	12.8%
Under 18 years	18.1%	21.5%	33.2%	27.6%	36.4%	24.8%	20.0%	17.5%
Under 5 years	20.1%	19.3%	33.1%	36.5%	27.1%	26.3%	22.1%	19.1%
5 to 17 years	17.4%	22.2%	33.3%	24.6%	39.4%	24.3%	19.3%	16.9%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020

Educational Attainment

Educational Attainment, 2020



Educational Attainment, 2020

Population Ages 25 Years or Higher

Category	Franklin County	Granville County	Person County	Vance County	Warren County	Kerr-Tar Region	North Carolina	United States
Less than High School	13.5%	13.9%	11.8%	16.9%	16.2%	14.2%	11.5%	11.5%
High School Graduate	29.8%	30.8%	36.0%	34.8%	38.3%	32.8%	25.5%	26.7%
Some College, No Degree	24.8%	21.3%	24.4%	21.8%	21.4%	23.0%	21.1%	20.3%
Associate Degree	10.8%	10.1%	12.1%	8.9%	8.8%	10.3%	9.9%	8.6%
Bachelor Degree	15.3%	16.0%	11.0%	11.6%	9.8%	13.6%	20.4%	20.2%
Graduate or Professional Degree	5.8%	7.8%	4.7%	5.9%	5.5%	6.1%	11.6%	12.7%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates 2016-2020

Commuting Patterns

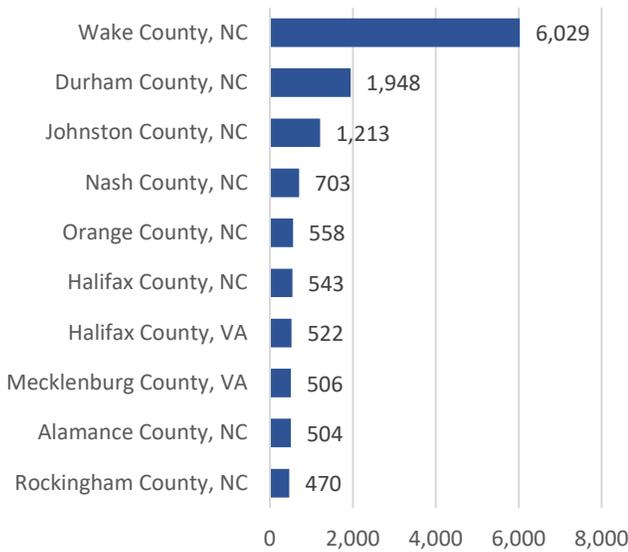
Commuting Patterns, 2019



Source: 2019 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Data represent primary jobs or one job per worker.

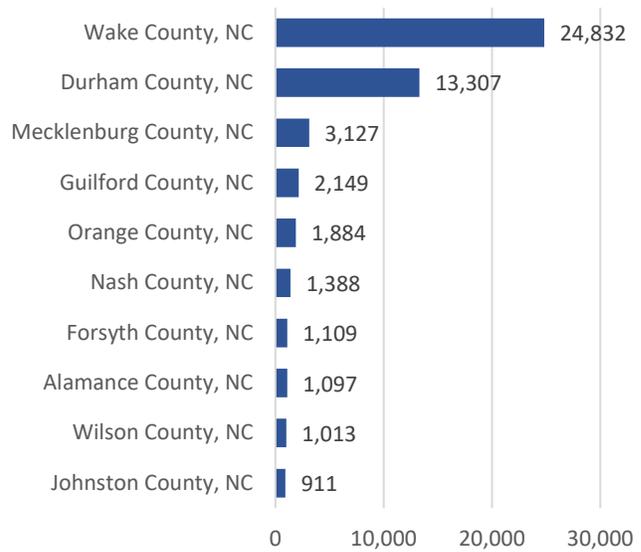
TOP COUNTIES FOR IN-COMMUTERS

Where Employees Live Outside Region, 2019



TOP COUNTIES FOR OUT-COMMUTERS

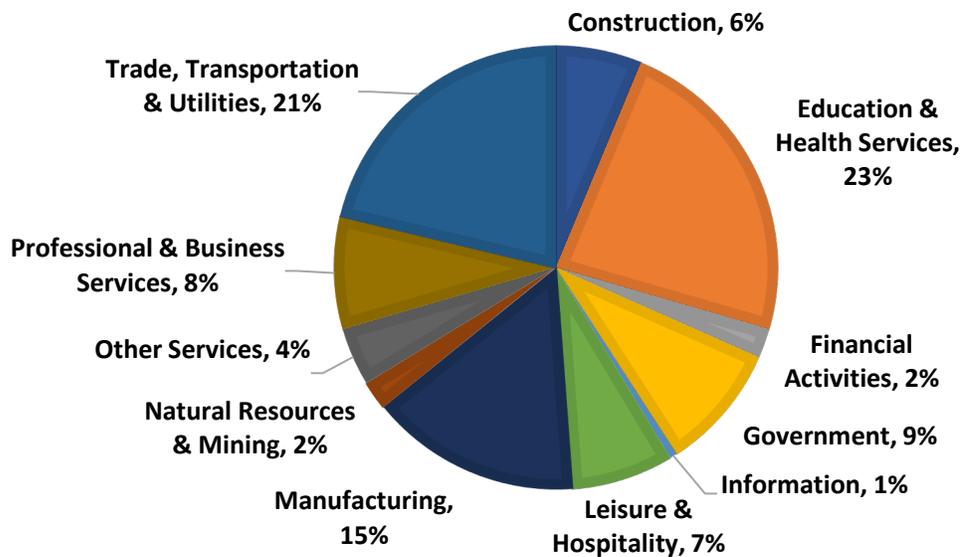
Where Residents Work Outside Region, 2019



Source: 2019 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Data represent primary jobs or one job per worker.

Industry Diversity

Kerr-Tar Region Industry Mix, 2021



Comparative Industry Mix, 2021

Industry	Kerr-Tar Region	North Carolina	United States
Manufacturing	15.3%	9.7%	8.1%
Health Care & Social Assistance	14.9%	13.4%	14.6%
Retail Trade	11.6%	11.1%	10.4%
Public Administration	9.2%	5.1%	4.8%
Educational Services	8.3%	7.8%	8.1%
Accommodation & Food Services	6.6%	8.3%	8.0%
Transportation & Warehousing	6.5%	4.4%	5.0%
Construction	6.3%	6.0%	5.9%
Administrative & Support, Waste Management & Remediation Services	5.0%	7.1%	6.4%
Other Services	4.2%	4.4%	4.3%
Professional, Scientific & Technical Services	3.0%	6.6%	7.2%
Wholesale Trade	2.5%	4.0%	3.8%
Agriculture, Forestry, Fishing & Hunting	2.1%	0.9%	1.4%
Finance & Insurance	1.3%	4.4%	4.1%
Arts, Entertainment & Recreation	0.9%	1.6%	1.8%
Real Estate, Rental & Leasing	0.9%	1.6%	1.8%
Utilities	0.7%	0.3%	0.5%
Information	0.5%	1.7%	2.0%
Management of Companies & Enterprises	0.2%	1.6%	1.5%
Mining, Quarrying, Oil & Gas Extraction	0.1%	0.1%	0.3%

Source: JobsEQ, Based on 2021 Average Employment for Covered, Uncovered, and Self-Employment within 5-county region

Employment Trend

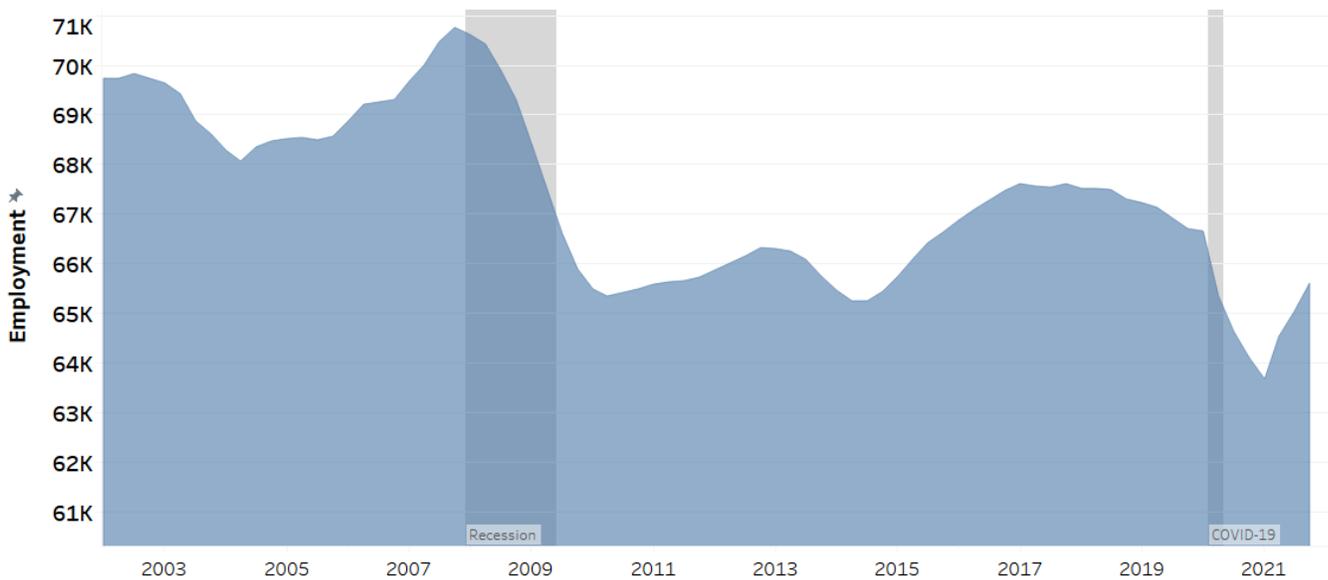
65,601

*Average Employment
Kerr-Tar Region, 2021*

-1,861

*Job Change 2016-2021
Kerr-Tar Region, 2021*

Kerr-Tar Employment Trends 2002-2021



Source: JobsEQ Quarterly Employment. Recessions based on the National Bureau of Economic Research (NBER) Business Cycle Dating.

Comparative Employment Trends

Geography	Kerr-Tar Region		North Carolina		United States	
	#	%	#	%	#	%
5-Year Change in Employment	-1,861	-3%	249,869	5%	1,947,913	1%
10-Year Change in Employment	-123	-0.2%	683,121	16%	14,567,337	10%

Source: JobsEQ, 2021

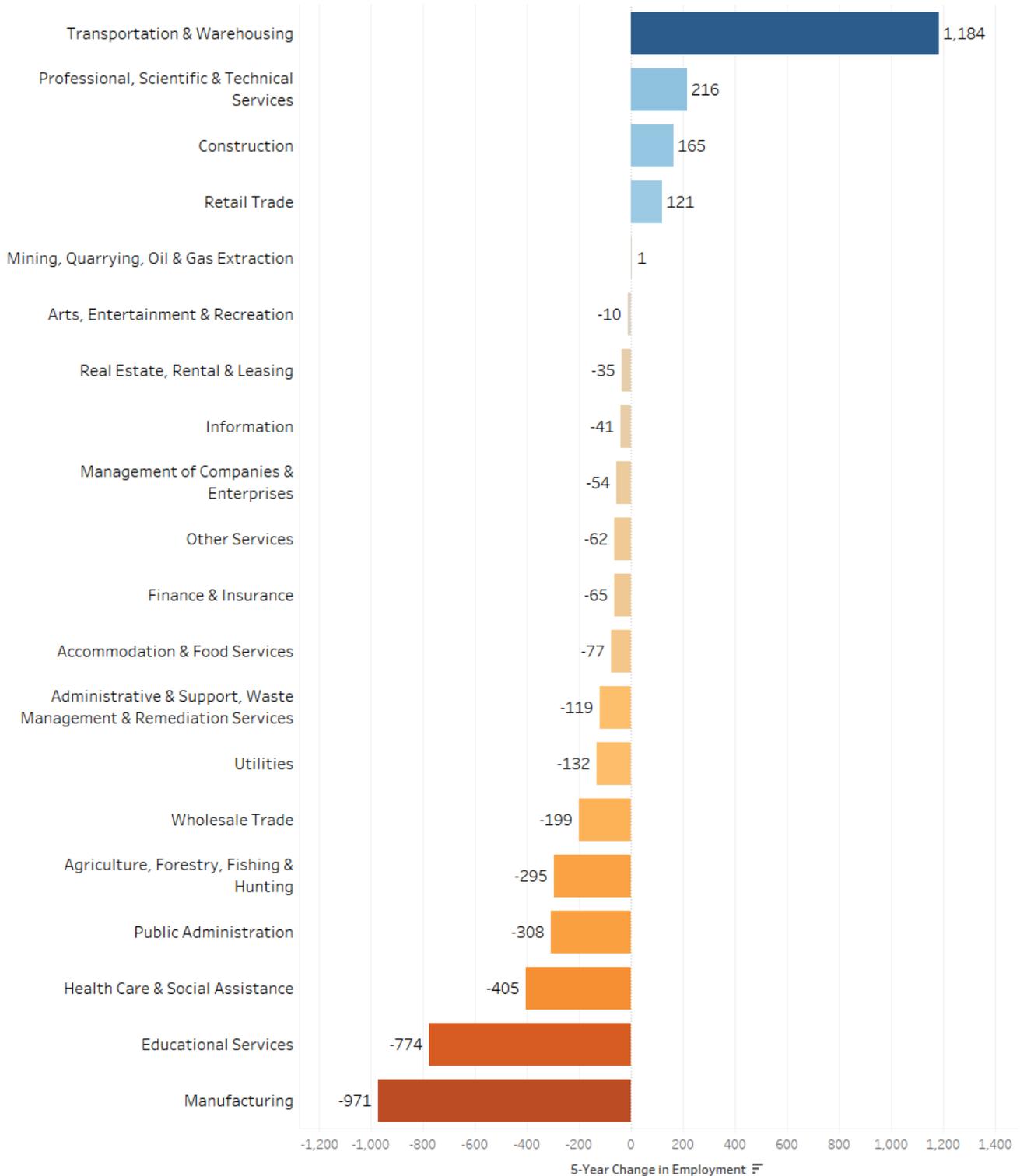
Employment Forecast

Employment Forecast	Kerr-Tar Region	North Carolina	United States
5-Year Forecast Growth Rate	3%	7%	4%
10-Year Forecast Growth Rate	7%	14%	8%

Source: JobsEQ, 2021

Employment Change By Industry

Employment Change from 2016-2021



Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Employment Trend By Industry

Employment Dynamics by Industry Sector

Ranked by Highest Employment

Industry Sector	2021 Average Employment	5-Year Employment Change	5-Year Employment % Change	10-Year Employment Change	10-Year Employment % Change
Manufacturing	10,066	-971	-9%	-160	-2%
Health Care & Social Assistance	9,802	-405	-4%	-1,630	-14%
Retail Trade	7,626	121	2%	502	7%
Public Administration	6,068	-308	-5%	-524	-8%
Educational Services	5,434	-774	-12%	-744	-12%
Accommodation & Food Services	4,303	-77	-2%	371	9%
Transportation & Warehousing	4,235	1,184	39%	2,547	151%
Construction	4,103	165	4%	451	12%
Administrative & Support, Waste Management & Remediation Services	3,284	-119	-4%	136	4%
Other Services	2,766	-62	-2%	176	7%
Professional, Scientific & Technical Services	1,959	216	12%	455	30%
Wholesale Trade	1,615	-199	-11%	-617	-28%
Agriculture, Forestry, Fishing & Hunting	1,350	-295	-18%	-285	-17%
Finance & Insurance	833	-65	-7%	-113	-12%
Arts, Entertainment & Recreation	574	-10	-2%	107	23%
Real Estate, Rental & Leasing	561	-35	-6%	24	5%
Utilities	475	-132	-22%	-146	-23%
Information	351	-41	-10%	-42	-11%
Management of Companies & Enterprises	151	-54	-26%	-621	-80%
Mining, Quarrying, Oil & Gas Extraction	45	1	2%	-10	-19%
Total	65,601	-1,861	-3%	-123	-0.2%

Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Employment Change Comparison

Comparative Employment Change by Industry Sector, 5-year Change

Ranked by Highest Percentage

Industry Sector	Kerr-Tar Region	North Carolina	United States
Transportation & Warehousing	38.8%	36.5%	19.4%
Professional, Scientific & Technical Services	12.4%	22.8%	11.0%
Construction	4.2%	15.0%	9.0%
Mining, Quarrying, Oil & Gas Extraction	2.3%	12.6%	-15.8%
Retail Trade	1.6%	3.0%	-2.6%
Accommodation & Food Services	-1.8%	-4.0%	-8.8%
Arts, Entertainment & Recreation	-1.8%	-7.3%	-10.6%
Other Services	-2.2%	4.6%	-4.1%
Administrative & Support, Waste Management & Remediation Services	-3.5%	5.8%	1.2%
Health Care & Social Assistance	-4.0%	4.3%	4.6%
Public Administration	-4.8%	2.3%	1.3%
Real Estate, Rental & Leasing	-5.9%	10.1%	4.2%
Finance & Insurance	-7.2%	24.4%	5.1%
Manufacturing	-8.8%	-0.3%	0.0%
Information	-10.3%	-1.5%	0.8%
Wholesale Trade	-11.0%	3.4%	-3.0%
Educational Services	-12.5%	0.1%	-1.4%
Agriculture, Forestry, Fishing & Hunting	-17.9%	-11.5%	-6.2%
Utilities	-21.8%	1.9%	-1.7%
Management of Companies & Enterprises	-26.3%	-8.5%	4.6%

Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Industry Wages

\$44,197

**Average Wage
Kerr-Tar Region, 2020**

32%

**Kerr-Tar Region Wage is 32%
Below the National Average Wage**

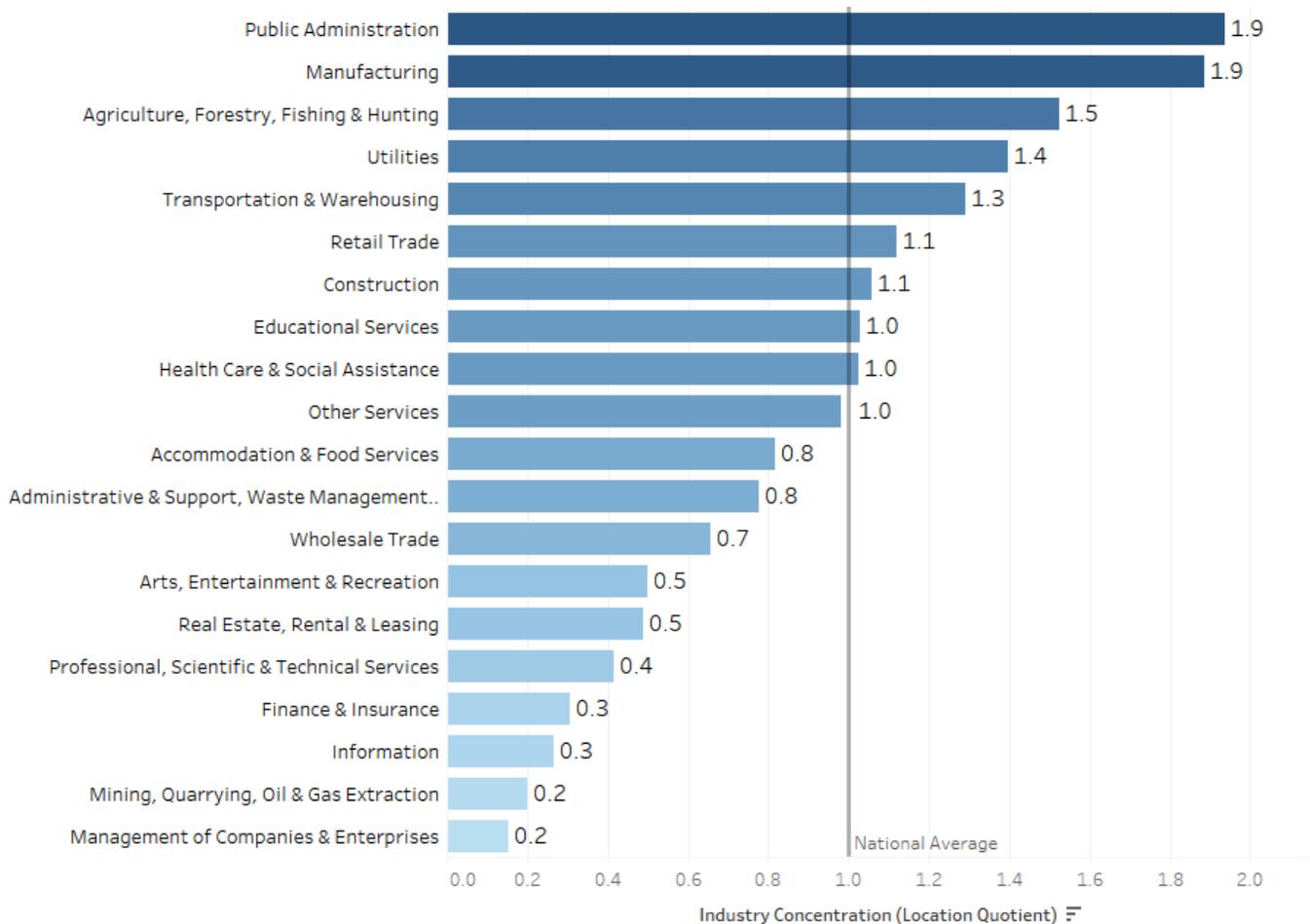
Average Wages by Industry Sector, 2021 Ranked by Highest Wage

Industry	Kerr-Tar Region	North Carolina	United States
Utilities	\$107,526	\$93,816	\$107,619
Management of Companies & Enterprises	\$90,145	\$127,101	\$139,660
Information	\$65,306	\$102,883	\$143,417
Manufacturing	\$59,356	\$65,039	\$75,133
Professional, Scientific & Technical Services	\$58,949	\$91,149	\$107,631
Finance & Insurance	\$57,488	\$113,324	\$127,555
Wholesale Trade	\$56,248	\$84,797	\$88,404
Mining, Quarrying, Oil & Gas Extraction	\$53,150	\$71,141	\$104,997
Public Administration	\$52,394	\$55,412	\$72,367
Transportation & Warehousing	\$46,300	\$49,268	\$56,330
Construction	\$46,126	\$56,472	\$63,512
Educational Services	\$44,372	\$52,474	\$57,502
Health Care & Social Assistance	\$43,081	\$58,094	\$58,857
Real Estate, Rental & Leasing	\$41,608	\$58,087	\$66,907
Agriculture, Forestry, Fishing & Hunting	\$34,326	\$47,138	\$42,229
Administrative & Support, Waste Management & Remediation Services	\$33,754	\$43,305	\$47,747
Retail Trade	\$29,927	\$35,104	\$39,324
Other Services	\$26,977	\$32,621	\$38,174
Arts, Entertainment & Recreation	\$17,558	\$35,618	\$42,815
Accommodation & Food Services	\$16,915	\$21,662	\$25,688
Average Wage for All Industries	\$44,197	\$57,136	\$65,055

Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021.

Industry Specialization

Location Quotient by Industry Sector, 2021



Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Location Quotient (LQ) is defined as an analytical statistic that measures a region’s industrial specialization relative to a larger geographic unit (usually the nation). For example, an LQ of 1.0 in Health Care & Social Assistance means that the region and the nation are equally specialized in mining; while an LQ of 1.9 in Manufacturing means that the region has a higher concentration in manufacturing than the nation.

Industry Shift-Share Analysis

The shift-share analysis takes the employment change over time and attributes change to three factors:

1. National growth effect is the portion of the change attributed to the total growth of the national economy. This equals the change in the region had it increased by the same percentage as the national economy.
2. Industry mix effect is the portion of the change attributed to the performance of the specific economic industry. This equals the theoretical change in the region had it increased by the same percentage as the industry nationwide, minus the national growth effect.
3. Local share effect is the portion of the change attributed to regional influences or specialization. This is the change variable once the National and Industry Mix effects are accounted for.

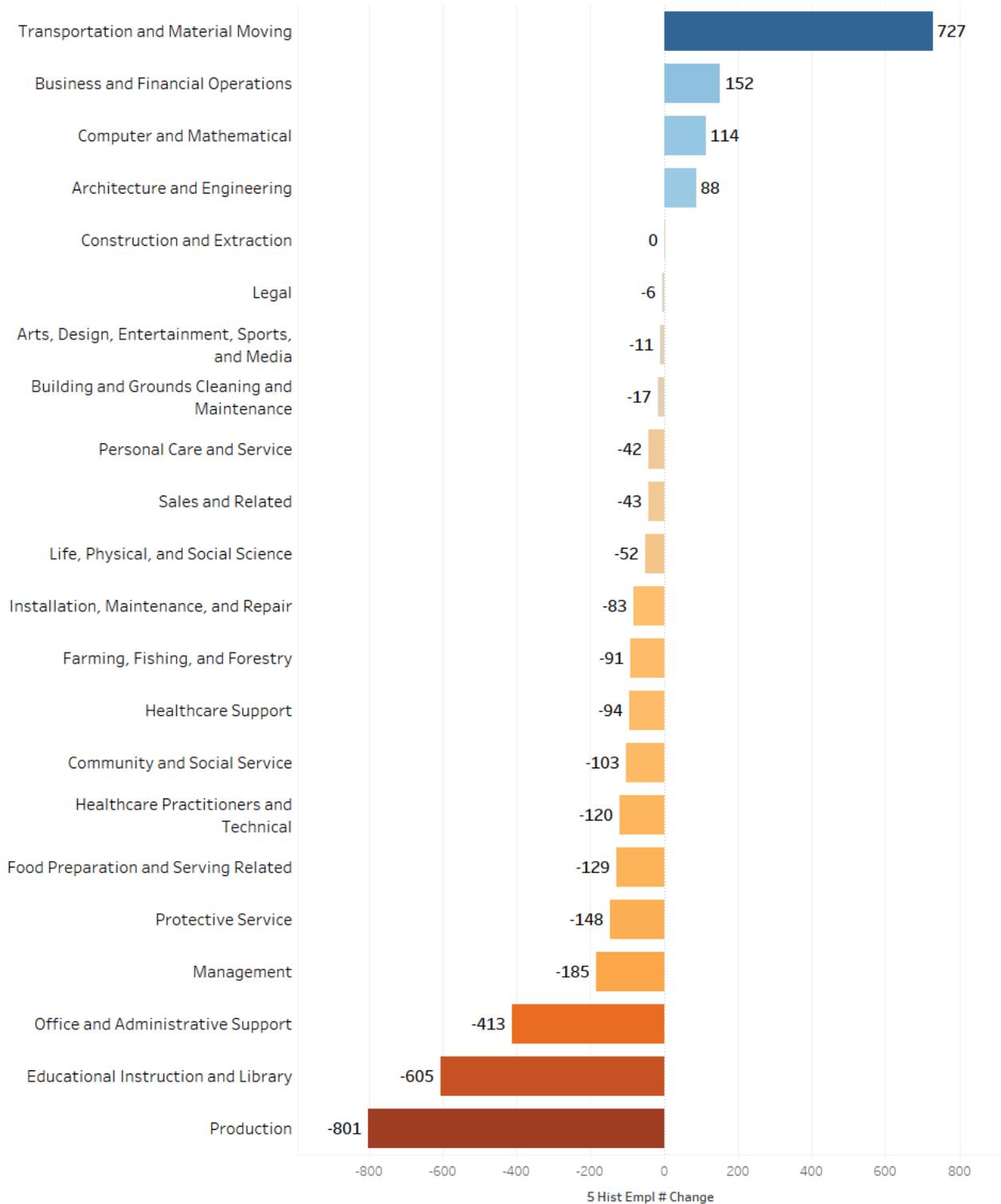
Shift-Share Analysis by Industry Sector, 2016-2021 Employment Change



Source: JobsEQ

Employment Change By Occupation

Employment Change from 2016-2021



Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Employment Trend By Occupational Group

Employment Dynamics by Occupational Group

Ranked by Highest Employment

Occupational Group	2021 Average Employment	5-Year Employment Change	5-Year Employment % Change	10-Year Employment Change	10-Year Employment % Change
Transportation and Material Moving	7,204	727	11%	1,939	37%
Office and Administrative Support	6,297	-413	-6%	-692	-10%
Production	6,046	-801	-12%	-447	-7%
Sales and Related	6,021	-43	-1%	-42	-1%
Healthcare Support	4,595	-94	-2%	-458	-9%
Food Preparation and Serving Related	4,492	-129	-3%	207	5%
Educational Instruction and Library	4,229	-605	-13%	-646	-13%
Management	3,482	-185	-5%	-198	-5%
Construction and Extraction	3,404	0	-0.01%	166	5%
Installation, Maintenance, and Repair	2,931	-83	-3%	179	7%
Healthcare Practitioners and Technical	2,691	-120	-4%	-463	-15%
Business and Financial Operations	2,629	152	6%	242	10%
Building, Grounds Cleaning and Maintenance	2,238	-17	-1%	167	8%
Protective Service	2,184	-148	-6%	-171	-7%
Personal Care and Service	1,663	-42	-2%	-17	-1%
Community and Social Service	1,336	-103	-7%	-120	-8%
Computer and Mathematical	1,207	114	10%	175	17%
Architecture and Engineering	943	88	10%	146	18%
Arts, Design, Entertainment, Sports, and Media	670	-11	-2%	2	0.3%
Farming, Fishing, and Forestry	513	-91	-15%	-63	-11%
Life, Physical, and Social Science	495	-52	-9%	-9	-2%
Legal	331	-6	-2%	-22	-6%
Total	65,601	-1,861	-3%	-123	-0.2%

Source: JobsEQ, Based on 4-Quarter Average Employment Ending Q4 2021. Employment includes Covered, Uncovered, and Self-Employment within 5-county region.

Occupational Wages

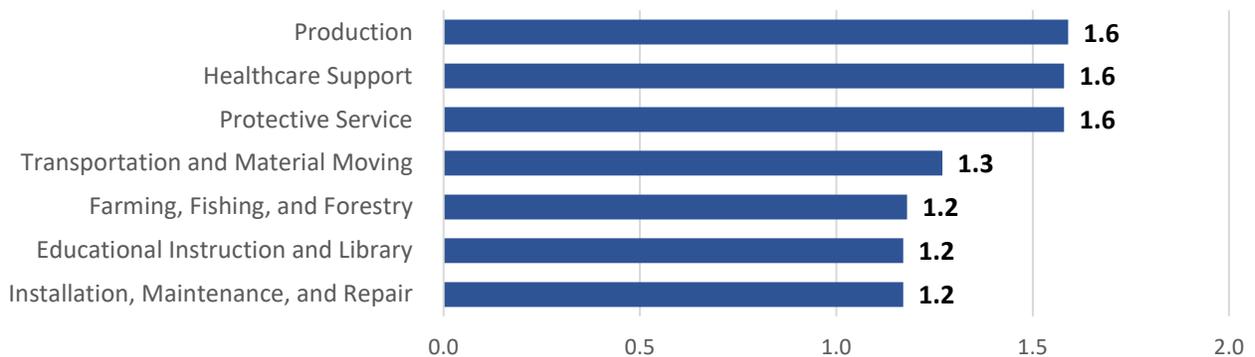
Average Wages by Industry Sector, 2021

Ranked by Highest Wage

Industry	Kerr-Tar Region	North Carolina	United States
Management	\$98,200	\$119,900	\$121,000
Legal	\$86,900	\$99,100	\$115,800
Computer and Mathematical	\$77,900	\$92,800	\$98,000
Architecture and Engineering	\$75,800	\$81,800	\$90,200
Healthcare Practitioners and Technical	\$74,500	\$80,300	\$87,200
Business and Financial Operations	\$66,600	\$78,700	\$81,100
Life, Physical, and Social Science	\$63,100	\$72,900	\$80,200
Community and Social Service	\$46,100	\$50,000	\$52,200
Installation, Maintenance, and Repair	\$45,800	\$49,100	\$52,100
Arts, Design, Entertainment, Sports, and Media	\$45,500	\$58,300	\$65,500
Educational Instruction and Library	\$43,200	\$51,400	\$59,100
Protective Service	\$42,600	\$42,000	\$51,900
Construction and Extraction	\$39,700	\$42,700	\$53,600
Production	\$38,500	\$37,800	\$41,700
Sales and Related	\$36,700	\$45,000	\$46,600
Office and Administrative Support	\$36,600	\$39,500	\$42,300
Farming, Fishing, and Forestry	\$33,600	\$30,900	\$32,800
Transportation and Material Moving	\$33,100	\$35,300	\$39,600
Personal Care and Service	\$28,400	\$29,000	\$32,400
Building and Grounds Cleaning and Maintenance	\$27,900	\$29,100	\$33,100
Healthcare Support	\$24,300	\$29,300	\$32,400
Food Preparation and Serving Related	\$21,800	\$24,300	\$27,700
Average Wage for All Occupations	\$43,300	\$51,400	\$56,400

Source: JobsEQ, Wages as of 2020.

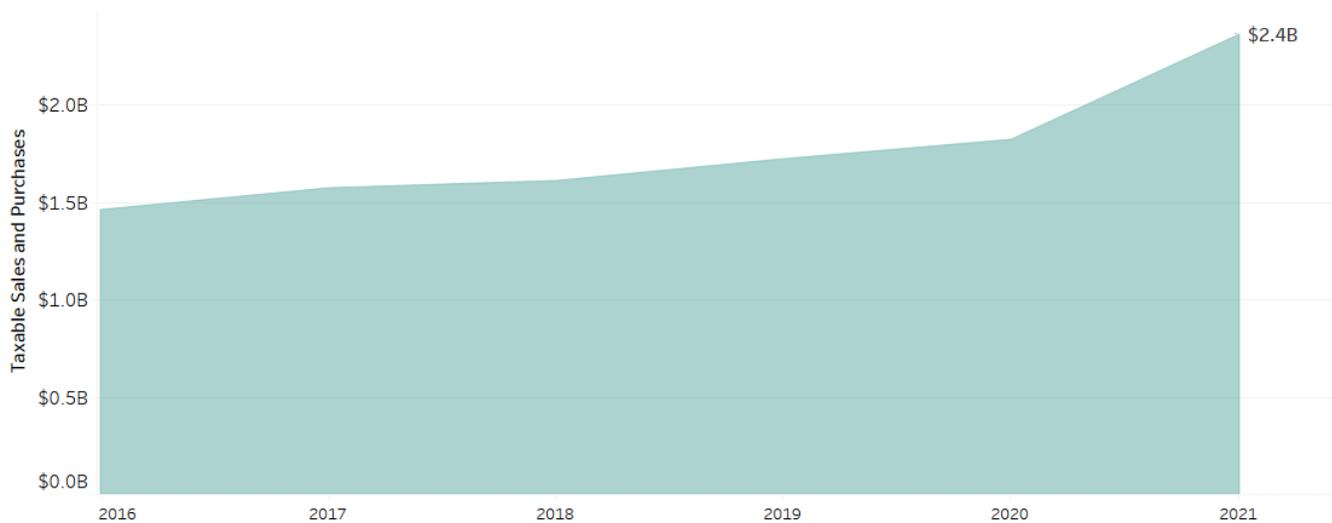
Top Occupational Location Quotients (Regional Specialization), 2021



Source: JobsEQ, Location Quotient measures employment concentration relative to the national level.

Retail Sales

Regional Retail Sales Growth, Fiscal Years 2016-2021



Source: NC Department of Revenue

Regional Retail Sales Growth, Fiscal Years 2016-2021

Geography	2016	2017	2018	2019	2020	2021
Franklin County	\$356M	\$394M	\$415M	\$449M	\$499M	\$655M
Granville County	\$318M	\$352M	\$350M	\$375M	\$404M	\$477M
Person County	\$295M	\$313M	\$334M	\$360M	\$357M	\$427M
Vance County	\$418M	\$436M	\$428M	\$450M	\$469M	\$670M
Warren County	\$73M	\$78M	\$81M	\$87M	\$96M	\$132M
Kerr-Tar Region	\$1,460M	\$1,572M	\$1,608M	\$1,722M	\$1,824M	\$2,362M

Source: NC Department of Revenue

Retail Sales Growth & Retail Sales Per Capita

Geography	Average Growth of Retail Sales FY 2016-2020	Growth of Retail Sales FY 2020-2021	2020 Retail Sales Per Capita	2021 Retail Sales Per Capita	1-Year Change in Retail Sales Per Capita
Franklin County	9%	31%	\$7,227	\$9,137	\$1,910
Granville County	6%	18%	\$6,611	\$7,702	\$1,091
Person County	5%	20%	\$9,119	\$10,912	\$1,793
Vance County	3%	43%	\$11,016	\$15,877	\$4,861
Warren County	7%	38%	\$5,151	\$7,054	\$1,903
Kerr-Tar Region	6%	29%	\$7,917	\$10,103	\$2,186
North Carolina	6%	16%	\$15,277	\$17,522	\$2,245

Source: NC Department of Revenue

Broadband

Broadband Access, 2022

Percent of Households with access to one or more internet providers with advertised download speeds at 250 megabits per second (Mbps) or higher via DSL, cable, fiber, and fixed wireless.

Geography	Speeds 250 Mbps +			Speeds 1 Gbps+		
	All	Urban	Rural	All	Urban	Rural
Franklin County	79.5	99.6	76.2	1.4	2.7	1.2
Granville County	81.7	99.4	68.0			
Person County	84.5	99.9	79.6			
Vance County	92.7	99.7	86.5			
Warren County	50.6	--	50.6	0.4		0.4
North Carolina	91.8	98.5	78.3	40.0	49.3	21.3
United States	88.8	96.0	59.7	26.7	28.9	17.8

Source: Broadband Map (FCC), December 2020

Average Download Speed, 2022

Average speed for downloading data for the entire City

County	City	Average Download Speed	Number of Internet Service Providers	Internet Providers offering 940 Mbps or higher
Franklin County	Franklinton	49.83	11	2
Franklin County	Louisburg	140.89	7	2
Granville County	Butner	35.87	11	1
Granville County	Creedmoor	97.61	15	1
Granville County	Oxford	66.44	11	1
Person County	Roxboro	51.53	14	2
Vance County	Henderson	114.15	15	2
Vance County	Kittrell	46.87	11	1
Warren County	Macon	23.11	6	1
Warren County	Warrenton	67.61	9	1

Source: BroadbandNow as of June 2022