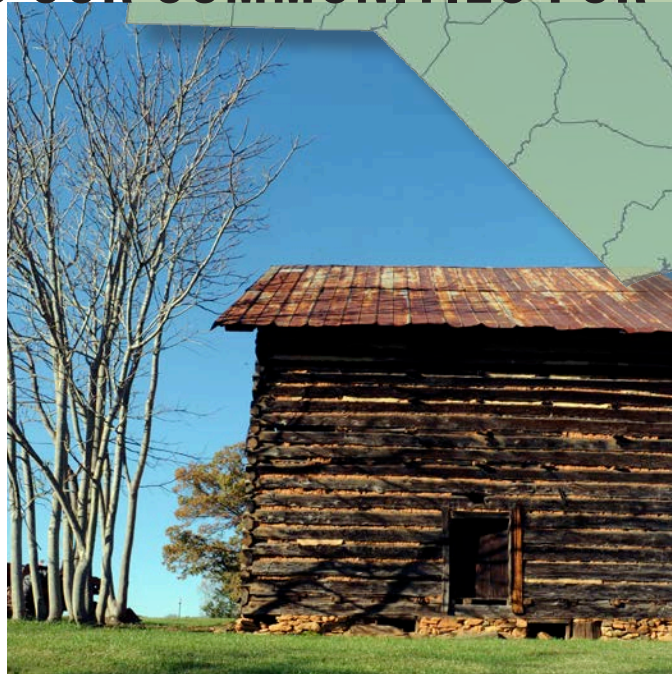




TRIAD TOMORROW
BUILDING OUR COMMUNITIES FOR TOMORROW'S JOBS

A graphic featuring a map of North Carolina with the Triad region (Fayetteville, Greensboro, and Winston-Salem) highlighted in a dark blue color. The text "TRIAD TOMORROW" is written in large, white, bold, sans-serif capital letters across the map. Below it, the tagline "BUILDING OUR COMMUNITIES FOR TOMORROW'S JOBS" is written in smaller, black, bold, sans-serif capital letters. To the left of the text is a circular logo containing a stylized blue wave.



PIEDMONT TRIAD REGIONAL COUNCIL

The Piedmont Triad Regional Council
in partnership with
The U.S. Economic Development Administration (EDA)
Present:

TRIAD TOMORROW

CREATIVE REGIONAL SOLUTIONS

Piedmont Triad Regional Council Project Team

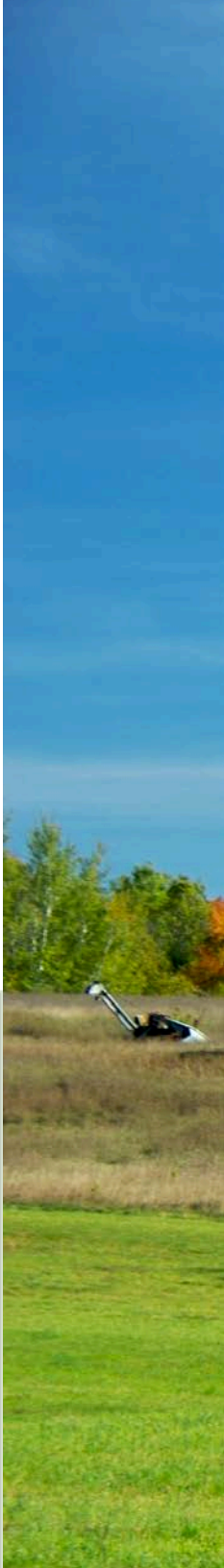
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Member Counties:

Alamance County
Caswell County
Davidson County
Davie County
Forsyth County
Guilford County
Montgomery County
Randolph County
Rockingham County
Stokes County
Surry County
Yadkin County



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EXECUTIVE SUMMARY

The Piedmont Triad Regional Council is a designated Economic Development District (EDD) through the US Economic Development Administration. As the region's EDD, the Regional Council is responsible for developing a comprehensive economic development strategy (CEDS) to identify regional priorities for community and economic development. Triad Tomorrow developed region-specific strategies around the following four broad goals:

- I. Build on the Region's Competitive Advantages and Leverage the Marketplace
- II. Establish and Maintain a Robust Regional Infrastructure
- III. Create Vibrant, Healthy, and Resilient Communities
- IV. Develop Talented and Innovative People

Through the input of various stakeholders, Triad Tomorrow identifies the challenges that must be overcome to achieve these goals, as well as the strategic and specific tactics for each. Triad Tomorrow highlights key priorities on which the region can work together to achieve significant results. By marshaling resources and fostering collaboration, local communities and regional organizations can make progress towards economic resiliency in these critical areas. Triad Tomorrow aligns with NC Tomorrow, North Carolina's Statewide CEDS, in an effort to foster stronger collaborations across the Piedmont Triad region and State of North Carolina.



CEDS Goals, Challenges, Strategies, and Tactics

This plan is built on the framework set out by the North Carolina Association of Regional Councils for the NC Tomorrow Initiative. This uniform framework establishes four overarching goals and a series of objectives for each. In developing this strategy, the following guidance was established:

Goals: Aspirational outcomes that move the region towards its vision by providing directional progress.

Challenges: Unique challenges faced by the Piedmont Triad region to meet each goal.

Strategies: Plan of action necessary to address each challenge.

Tactics: Specific work elements and strategic actions to address challenges and goals.

I. Build on the Region's Competitive Advantages and Leverage the Marketplace

Sectors of the Piedmont Triad's regional economy vital to our economic mix are growing and emerging throughout the region. These include market clusters, entrepreneurship ecosystems and our region's quality of life. The primary goal related to competitive advantage and leverage is to build on and improve the economic sectors that are authentic to the Piedmont Triad region.

*NC Tomorrow Policy Recommendation:
To achieve true prosperity, North Carolina will successfully coordinate efforts to build, grow and maintain robust, competitive areas of proficiency and innovation throughout the state.*

This strategy supports the continued evolution of existing clusters within the region such as life sciences, manufacturing, and travel and tourism. The Piedmont Triad region is ranked 2nd in the state in the life sciences sector with multiple healthcare organizations and a strong core of universities training the medical professionals of tomorrow.

There are distinct differences in the economic characteristics between the urban core and rural areas of the Piedmont Triad. The region must leverage the unique characteristics of both areas to achieve comprehensive and equitable economic outcomes.

Targeting the Region's Growth Clusters

The Piedmont Triad region leads the state in the number of manufacturing jobs, with over 100,000 manufacturing jobs. Roughly 22% of all manufacturing jobs in the state are located in the Piedmont Triad region (NC Commerce, 2018). The following are the top industry clusters throughout the region:

- A. Health Care & Social Services
- B. Manufacturing
- C. Retail Trade
- D. Accommodation & Food Services
- E. Educational Services



II. Establish and Maintain a Robust Regional Infrastructure

The Piedmont Triad is served by an unparalleled network of Interstate highways. According to the Seven Portals Study, the region's highway network provides overland access to half of the continental US in two days or less (Seven Portals Study, 2011). Today air services for freight and passengers are a critical part of the transportation network, linking Piedmont Triad businesses with national and international markets. These services are provided through a network of eight publicly owned general aviation airports and the Piedmont Triad International Airport (PTI) which offers scheduled commercial air service in addition to general aviation.

For more than 150 years, railroads have played an important role in linking the people and goods of the Piedmont Triad to destinations and markets across the US. Of the 5,767+ miles of rail lines in NC, 491 miles are owned by the North Carolina Railroad Company. The remaining trackage is owned and operated by Norfolk Southern, CSX, and short line railroads like the Yadkin Valley Railroad Company.

The Piedmont Authority for Regional Transportation (PART) has worked over the years to increase inter-regional bus transit and now public transit options are expanding into even our most rural communities. Expanding transportation options and planning for the eventual automation of transportation systems will be critical to meet the needs of the future.

Infrastructure is much more than just transportation - it also includes schools and universities, water and wastewater systems, parks and protected lands, and developed and undeveloped sites for industry. Planning and preparing for all infrastructure needs will be critical to community and economic development over the next five years.

III. Create Vibrant, Healthy, and Resilient Communities

The health, vitality and resiliency of Piedmont Triad communities is important to economic development as we increasingly understand one single principal: *place matters*. It is the feeling of "place" that makes a community what it is, it is what draws in tomorrow's workforce, and it is what brings businesses to locate here. It is more feeling than data that makes the creation or migration to such a station in the life of a town, city, or county. It's one of those "know it when you see it" characteristics that tends to draw people to a place as a result of both the built environment and the way the people in the community come together.

The sense of place and community in the Piedmont Triad can be found throughout the numerous downtowns, farmers markets, parks, libraries, and schools to name a few. Economic activity is central to the resiliency of place. Business activity represents the ability to sustain restaurants, cafes and breweries, tax revenues from downtown districts fund streetscape improvements and help implement new amenities like free Wi-Fi. Farmers markets provide access to healthy local food options and bring neighbors together to create a living sense of community. They are generally inexpensive to establish and can pay excellent community vibrancy dividends.

Communities that are developed or retrofitted to provide for bicycle and walking paths exude a sense of vitality and healthiness. Connectivity and culture work hand in hand. Changes in diversity, though sometimes a challenge, can also become outstanding community assets. New foods, arts, languages, cultures, talents, and abilities add to the vitality and resiliency of place - making communities stronger and more attractive to visitors, residents, and industries.



IV. Develop Talented and Innovative People

Talent represents the skills, knowledge, and abilities consistent with preparing for and providing value in the workplace. Our region includes a trainable workforce of more than 650,000+ people with a high productivity rate, as well as experience in manufacturing, financial services, healthcare, and the biomedical field.

Recognizing that each community grows stronger as each person is more capable, and that greater civic engagement can help mitigate the impact of economic challenges and strengthen our region. As communities through the Piedmont Triad build their collective social capital, they will become more capable of continuing the process toward community transformation, where human talent is optimized for local and regional success.

Our region will need a wide range of multi-faceted strategies to successfully address this critical workforce development trend. Not everyone is at the same station in life. People have different capacities and skill sets to develop. A higher baseline of education attainment, training for citizens of all ages to “learn how to learn” and providing for greater adaptability, are paramount in the global economy.

Despite historically high unemployment rates, many employers across the state have experienced difficulty in finding, recruiting, and hiring the kinds of skilled workers the companies need to be competitive. For some employers, the challenge is finding individuals with basic work readiness skills. For others, the challenge is finding individuals with applied technical skills to maintain a competitive edge. Companies increasingly need the higher education system to meet this workforce need efficiently.

Dream It, Do It Initiative

The Piedmont Triad Regional Council has partnered with the Manufacturing Institute out of Washington D.C. to bring the Dream It, Do It initiative to Piedmont Triad communities. Dream It, Do It is an initiative that helps connect local manufacturers, schools, community colleges, community-based organizations and other stakeholders. It works to change the misperception of the industry and inspire next-generation workers to pursue careers in manufacturing.

Manufacturing has a proud tradition in North Carolina, but today's manufacturing is very different than it was just a generation ago. Today manufacturing is about advanced technologies, state of the art facilities, and fast-paced, exciting work environments. The Piedmont Triad Regional Council leverages this partnership to work with private industry leaders to host Manufacturing Day events. Manufacturing Day has been designed to expand knowledge about and improve general public perception of manufacturing careers and manufacturing's value to the U.S. economy. Manufacturing Day is for students, parents, educators, media, customers, suppliers, and the community at large. Visitors will learn about real career opportunities, training and resources, and services delivered through manufacturing extension partnerships.

The Dream It, Do It Ambassador training initiative is evidence of the continued dedication of the Piedmont Triad Regional Council and the Triad Tomorrow CEDS to develop the talented and innovative workforce to meet the demands for today's workforce - and the workforce demands of tomorrow. This training prepares companies with launch support, how-to-guides for hosting manufacturing day, marketing resources and more to enable them to grow their workforce.

INTRODUCTION

Triad Tomorrow, the Piedmont Triad Comprehensive Economic Development Strategy (CEDS), serves as the foundational economic development element of our region's sustainable communities planning efforts. *Triad Tomorrow* is an initiative of NC Tomorrow as part of the North Carolina Association of Regional Councils in partnership with numerous organizations across the Piedmont Triad region.

This update was developed with input from private business owners, city, county and town managers, planning professionals, economic developers, and various other groups. In addition, a new region-wide survey was conducted in October of 2017 to gauge the process as well as the ongoing challenges of the community and economic well-being of the Piedmont Triad. This plan is designed for the stakeholders in the region's economic and community development agencies as a set of goals, strategies, and tactics to reach the higher-arching goals of making the Piedmont Triad a better place to live, work, and play.

The Piedmont Triad Regional Council (PTRC) is a designated Economic Development District (EDD) through the US Economic Development Administration (EDA). As the region's EDD, the regional council is responsible for developing a Comprehensive Economic Development Strategy (CEDS) to identify regional priorities for economic and community development. The CEDS is also designed to help stakeholders form partnerships to leverage existing resources that will revitalize the communities of our region.

The CEDS is a responsive and flexible five-year strategic economic development plan, designed to be easily adjusted to meet the changing needs of communities throughout the region. This document lays out the challenges that the Piedmont Triad needs to overcome to realize its goal of economic recovery and resiliency and recommends strategies for addressing these challenges directly.



The Piedmont Triad region lies on the Piedmont Plateau of the Southeastern United States and stretches from the foothills of the Appalachian Mountain range to the sand-hills of the coastal plain, covering 5,868 square miles. The Piedmont Triad's land area consists of 55% forest cover, 21% agriculture or pasture, and 19% developed land. (NLCD, 2016).

Triad Tomorrow identifies and values a wide range of economic assets, resources, and opportunities - urban and rural, large and small, wealthy and underserved. This CEDS underscores the importance of equity among our citizens, sustainable growth, and building more resiliency into our local economies and communities.



Though the Piedmont Triad Regional Council has taken the lead role in developing the Piedmont Triad CEDS, it will take the concentrated energy, resources and knowledge of many strategic partners to accomplish the goals and complete the objectives and strategies outlined in the plan. The CEDS contemplates a five-year horizon (2018-2022), while recognizing that achieving the plan's goals will be more long term. The plan will require update and renewal as its five-year term ends. This CEDS helps foster and support the good work already underway across the region and moves it forward, bringing the public and private sectors together to continue to achieve great things. As the plan is implemented, it will be reworked, retooled and refined to better reflect the economic development goals and aspirations of our region, now and in the future.

PIEDMONT TRIAD REGION

The Region

The Piedmont is the area lying between the Atlantic Ocean and the Appalachian Mountains. The Triad is named for the three largest cities in the region: Greensboro, Winston-Salem, and High Point. The region boasts excellent transportation and educational facilities, making the region a hub for commerce along the mid-Atlantic. There are approximately 900,000 jobs in the Piedmont Triad.

Among the 12,000 miles of roadways in the region are Interstates 40 and 85 bisecting the region east to west with Interstate 77 running north/south. Two new interstates, I-73 and I-74, are already completed in most areas and under construction in others. Piedmont Triad International Airport (PTI) is located in the center of the region, and eight additional airports handle both commuter, freight, and corporate aircraft.

There are 13 colleges and universities in the region with a total enrollment exceeding 60,000. In addition, nine technical and community colleges serve an additional 50,000 students. The region's economy has historically been tied to textiles, furniture, and tobacco, but new growth industries are emerging rapidly, including distribution, auto manufacturing, bio-technology, aviation & aerospace, and healthcare.

The Piedmont Triad Regional Council serves its 73 members and the citizens of the region by administering programs related to aging, criminal justice, housing, regional planning, water resources, transportation, business investment lending, information services, personnel administration, recreation and open space, weatherization, workforce development, and more. We hope you browse through our website to find out more about our region and about our program areas at www.ptrc.org.

Competitive Assets

The Piedmont Triad is centrally located on the eastern seaboard, easily accessible to the entire Southeast region which provides a unique position for access to markets and labor. The region has skill-ready workforce with multiple training programs providing opportunities for emerging industries.

The transportation network in the Triad consists of four major interstate highways and several secondary routes that link the region to the State of North Carolina as well as Virginia. The Piedmont Triad also has expansive rail connectivity linking local industries to seaports in Norfolk VA, Morehead City, NC, Charleston, SC, and Savannah, GA, allowing for prime accessibility for trade and transport.



Population

Population numbers in the Piedmont Triad continue to grow and expand. According to the 2016 US Census data the region as a whole exceeded growth expectations by 5%. During the past decade, the Piedmont Triad's population growth has been broad-based, with increases across every age and racial/ethnic group. The Piedmont Triad's veteran population has also increased significantly in recent years.

Despite healthy levels of population growth, the effects of the Great Recession continue to linger. Between 2007 and 2010, local employers shed more than 50,000 jobs. Fortunately, the region has since rebounded - the overall employment base has increased for 7 consecutive years but remains below pre-recession levels. Continued growth throughout the Piedmont Triad region will make it easier for employers to attract additional outside workers while increasing the opportunity to keep more residents employed locally.

Cluster Strengths

The Piedmont Triad was known for many years as an economic hub for furniture, textiles, and tobacco - and although those industries define our region's rich history - the industries of today define our future. Today the Piedmont Triad's leading employers are in industry's such as manufacturing, healthcare, back office, and entertainment & retail. However, when looking at employment growth data the region is seeing the largest growth in the fields of: aerospace, biomedical, automotive, metalworking, and energy.

These industries represent the future of economic growth in the Piedmont Triad. The region will need to expand on these emerging opportunities in aerospace, vehicles, and medical instruments and devices manufacturing. Paired with strong regional partnerships, the business climate of North Carolina as a whole puts the Piedmont Triad in a position to grow. But state and national trends cannot be ignored; population growth will slow and diversify, technology will continue to change every industry, and our people will need more skills to compete.

Travel & Tourism

In 2019, 76 percent of North Carolina visitors traveled to North Carolina's Piedmont Region, approximately 36.5 million person-trips (VisitNC, 2019). On average, overnight visitors to the region spent 3.9 nights, and the average household trip expenditure for overnight visitors was \$623 (VisitNC, 2019). The Piedmont Triad region has shown considerable advantages in travel in tourism while competing with the mountains in the west and coastal communities in the east.

North Carolina has, as a state, continually been ranked high for the economic and tax conditions in place to support business. In 2017 North Carolina was ranked the #1 Best State For Business by Forbes (Forbes, 2017).

REGIONAL ANALYSIS

Strengths

- Strategic location in the southeast and eastern seaboard
- Continued population growth
- Presence of existing industrial sites prime for redevelopment
- Transportation infrastructure
- Piedmont Triad International Airport (PTIA)
- Availability of rail service
- Low cost of living
- Cultural heritage
- Cultural capital (leisure, arts, and entertainment orgs.)
- Faith community
- Wealth of public and private colleges and universities
- Work ethic of the labor force
- Access to quality healthcare services

Weaknesses

- Regional identity and branding
- Regional communication
- Competition among regional jurisdictions
- Strengthening central business districts
- Broadband and cellular coverage
- Funding cuts impacting education
- Stagnant income levels
- Public transportation

Opportunities

- Regional collaboration and cooperation
- Building a culture of entrepreneurship
- Ready to go industrial sites
- Changing demographics and increasing diversity
- Building diverse regional leadership capacity
- Develop and support Piedmont Research Park
- Develop local and regional trails
- Invest in student apprenticeship programs

Threats

- Continued reliance on traditional industry sectors
- Reliance on external funding
- Crime, perception of crime
- Unemployment and under employment
- Growth restrictions
- Inconsistent land development & zoning policies
- Ability to attract and retain young people
- Affordable housing options
- Childcare

TRIAD TOMORROW ACTION PLAN

Triad Tomorrow was created to be the foundational economic development element for the 12 county region of the Piedmont Triad. This document aims to create a more uniform, coordinated approach to economic development planning across North Carolina. Triad Tomorrow will serve as the guiding document for resilient economic development in the Piedmont Triad for the next five years.



The CEDS will benefit communities in our region in three important ways:

The CEDS is to be combined with those of the other regional councils across the state, and then submitted to the Economic Development Administration (EDA) for approval. Upon approval, organizations in our region will continue to be eligible to compete for assistance under EDA's public works program, economic adjustment program, and of its planning program.

The CEDS highlights key priorities on which the region can work together to achieve significant results. By marshaling resources and fostering collaboration, local communities and regional organizations can make progress in these critical areas.

The CEDS identifies important regional interests. Communities seeking to advance projects in these identified areas can use the CEDS to demonstrate that their projects are not just of local concern, but support broader regional interests.



Triad Tomorrow is based upon four comprehensive goals for development in the Piedmont Triad Region:

1. To Build on the Region's Competitive Advantages and Leverage the Marketplace
2. To Establish and Maintain a Robust Regional Infrastructure
3. To Create Vibrant, Healthy, and Resilient Communities
4. To Develop Talented and Innovative People.

Equity

Strategic educational and workforce development investments are essential to economic growth for our nation, our state, and our region. Equity has become an economic imperative for stronger growth, a better bottom line, and better connections to global markets. Triad Tomorrow and the strategies herein have been developed with all walks of life, backgrounds and origin in mind, in the attempt to provide opportunities for growth and advancement for every person in the Piedmont Triad.

GOAL 1: BUILD ON THE REGION'S COMPETITIVE ADVANTAGES AND LEVERAGE THE MARKETPLACE.

To strengthen our prosperity, we will coordinate efforts to build new, and maintain existing competitive areas of proficiency and innovation in communities across the region.



Challenge 1: There are distinct differences in the economic development characteristics between the urban core and rural areas of the Piedmont Triad. The region must work to ensure equitable growth and development opportunities across the entire region while leveraging the competitive advantages found in both urban and rural settings: including: entrepreneurship, design and innovation, resurgence of skilled craftsmanship, and agriculture.

The Piedmont Triad has remarkable institutional, infrastructure, and human capital assets. The urban core has a significant number of traditional economic development competitive advantages including universities, highways, airports, and utilities. Formal educational attainment and projected population increases are highest in our region's urban core.

Our rural areas, represented by six of the twelve counties in our region, take a different route to economic prosperity. Though they may find success in vastly different ways, the synergy leading to success will be maximized if all players are engaged in regional economic development efforts.

The economic history of the Piedmont Triad region of textiles, furniture, and tobacco manufacturing will always be a defining factor for our region. However, the region as a whole has moved into a new era expanding life sciences, manufacturing, and aerospace clusters that will define our future.

While the cluster targets of these industries provide a strong foundation on which to continue building

the existing economy, Piedmont Triad leaders recognize that emerging growth opportunities will rely on innovative technologies and transformational business models rather than just continuing to build on existing industry clusters. The region as a whole should always be looking towards the future.

The Piedmont Triad has also seen a resurgence in our downtown cores. From urban to rural, municipalities across the region are making investments into quality of life, recreation, health and education. These investments are the catalysts for development of strong communities across the region and represent the Piedmont's strong ranking for travel and tourism.

Agribusiness revenues in the Piedmont Triad grew 92% from 2007, representing the enduring commitment to agriculture throughout the region. The emphasis on local, healthy food choices among many residents - urban and rural - is providing opportunities for farmers, growers, and ranchers. New and revived efforts to promote farmers markets, collectives, and co-op's are finding continued success.

The Piedmont Triad is home to over 50 of North Carolina's wineries with 3 out of 5 registered American Viticulture Area's (AVA) in the state. The state as a whole saw increases of more than 40 percent in wages paid to employees, retail value of wine sold, and taxes paid to federal, state, and local governments from wineries. The total economic impact of North Carolina's wine and grape industry is \$1.97 billion.

GOAL 1 CHALLENGE 1

STRATEGIES AND TACTICS:

1. **Implement collaborative economic development initiatives to efficiently leverage resources for global competition in rural and urban areas.**
 - 1.1 Support and foster new regional partnerships for inter-jurisdictional industrial and business districts.
 - 1.2 Collaborate with regional partners to improve urban to rural market connections.
 - 1.3 Develop opportunities to retool current and former manufacturing operations into green industry component manufacturer's for wind, solar, and biomass technologies.
2. **Develop talent capacity for regional clusters through education, mentoring, and internship programs.**
 - 2.1 Explore creative introductory educational programs in K-12 for teachers, parents and students in hospitality/tourism, robotics, coding and computer science, and manufacturing.
3. **Support economic innovation and resilience throughout the region.**
 - 3.1 Market the region as a location for new, and expanding business headquarters and manufacturing.
 - 3.2 Improve access to capital (angel, venture, and loan programs) for all types of businesses large and small.
 - 3.3 Support the establishment of business and agriculture incubators that work with existing industries for technological innovations.

PERFORMANCE MEASURES:

Milestones:

- Collaborations on economic initiatives between rural and urban areas
- Support networks (e.g. financing, technical assistance and physical resources) for existing and growing business, both large and small
- Innovative and flexible systems and networks to support talent capacity in existing and growing sectors

Metrics:

- Revenue and job growth for key industries
- Number of collaborations within and between key industries
- Lower the skills gap for available jobs



GOAL 2:

ESTABLISH AND MAINTAIN A ROBUST REGIONAL INFRASTRUCTURE

To remain competitive in a growing global economy, the Piedmont Triad will make the revitalization and improvement of state and local infrastructure a priority for funding.

The Piedmont Triad has important regional infrastructure assets including: broadband, highways, freight and passenger railroads and airports, public transportation systems, electric and gas utilities, educational institutions, healthcare facilities, solid waste, housing, water and wastewater systems, land for development and redevelopment, parks, trails, sidewalks, open space, rivers, and Opportunity Zones. Continual, yet strategic investment in each of these built and natural environment infrastructure systems is important for the region's economic development strategy.

Moving goods and information efficiently are vital to accessing markets, moving workers and maintaining cost-competitive production of products and services - NC Tomorrow Building Communities for Tomorrow's Jobs

Collaboration among regional infrastructure partners and system owners is vital to implementing cost effective strategic improvements to these systems in the Piedmont Triad, larger Piedmont Crescent and North Carolina.

Challenge 1: Having construction ready sites available to meet the demand has merit in site selection searches. However, new sites are only part of the picture. The Piedmont Triad has a significant resource of old mill and manufacturing buildings which serve as potential assets for redevelopment and re-purpose.

Large-scale manufacturing operations that characterized a building's original use are often no longer appropriate. However, many of these sites and buildings can be repurposed format to include a wide range of research and development, office and commercial space (e.g. business incubator space), residential (e.g. condominiums and apartments, senior and student living), and institutional uses (e.g. community center).

Strategic investments will be pursued in catalyst areas to stimulate the redevelopment of brownfield sites, Opportunity Zone sites, and surrounding properties.

This will improve quality of life, increase the tax base, and provide greater housing and transportation choices in communities throughout the region.

These efforts have already shown success throughout our region - the redevelopment of Revolution Mill in Greensboro now provides commercial, restaurant, and residential space in a community that was seemingly left behind. Lexington has taken back its downtown area and, where abandoned factories once reigned, businesses now flourish, and the public is returning uptown to live, work, and play.

These efforts go beyond economic development with impacts on human health and the environment by reviving community buildings, eliminating risks for pollution and water contamination, and rebuilding a sense of community in areas that once thrived.

STRATEGIES AND TACTICS:

1. **Seek local government accommodation for the development and redevelopment of shovel ready industrial sites.**
 - 1.1 Develop an inventory of potential industrial and opportunity zone sites and catalog them with an easily accessed map.
 - 1.2 Ensure that proper zoning, special use permits, watershed regulations, resilient building practices, and any other barriers are identified.
 - 1.3 Promote and fund a regional brownfields program and inventory throughout the region.
2. **Collaborate inter-jurisdictionally for site development and partnerships with businesses, industrial parks, public-private partnerships, and other related nonprofits.**
 - 2.1 Identify the infrastructure needs of potential sites and whether needs can be met by neighboring jurisdictions.
 - 2.2 Discuss cost sharing and tax revenue sharing possibilities between municipalities.
 - 2.3 Utilize New Market Tax Credits, Historic Preservation Tax Credits, and Opportunity Zones to assist in financing projects in lower income areas.

PERFORMANCE MEASURES:

Milestones:

- Improve database and use of available development and redevelopment sites
- Use of tax credits and innovative finance tools for development

Metrics:

- Inter-jurisdictional public and private partnerships for site development
- New Market, TIF, historic tax and other tax credit utilization rate
- Brownfield assessments and clean-ups



GOAL 2:

Challenge 2: Encouraging development also comes with a responsibility to support and protect our natural environment. As the Piedmont Triad grows, so to should our investments in smart growth and transportation options for rural areas, aging populations, and underserved areas.

STRATEGIES AND TACTICS:

- 1. Enhance transportation options through expanded and innovative infrastructure and transportation services.**
 - 1.1 Complete urban beltways around Greensboro and Winston-Salem and planned interstate and NC Highway improvements (I-73, I-74).
 - 1.2 Expand regional (PART) and local mass transit systems and funding options for easier connectivity between local transit options, including more shared-use park and ride sites.
 - 1.3 Research impact of transportation investments on local economic development.
 - 1.4 Promote transportation solutions for aging and underserved populations.



2. Support implementation of alternative fuels and electric vehicle infrastructure.

- 2.1 Organize and conduct outreach and educational efforts to the community through digital and print efforts, events, and trainings.
- 2.2 Develop and promote a clean transportation data base for the Piedmont Triad.
- 2.3 Support NC Smart Fleet initiative to support alternative fuels and clean transportation technology.

PERFORMANCE MEASURES:

Milestones:

- Increased multi-modal transportation networks
- Implement Piedmont Triad Electric Vehicle Plan

Metrics:

- Number of new transit routes and usage rates
- Mileage of bicycle and pedestrian facilities
- Utilization rate of transit and alternative forms of transportation
- Electric and alternative fuel vehicle registrations

GOAL 2:

Challenge 3: Many areas of the Piedmont Triad still lack adequate high speed broadband access. High-speed broadband is now a necessity for the development of resilient and successful communities. The switch to digital textbooks in public schools makes this critical to our rural areas. Improved broadband is absolutely critical to become globally competitive in research and innovation.

STRATEGIES AND TACTICS:

- 1. Expand the reach and increase the upload/download speeds of broadband internet service throughout the region.**
 - 1.1 Build upon NC Broadband programs (BIP, Middle Mile, others) and Federal program (ReConnect, Opportunity Zones, others) to bring high speed broadband to rural areas of the Piedmont Triad.**
 - 1.2 Support NC Office of Information and Technology Broadband mapping project to identify broadband speeds across the region.**



PERFORMANCE MEASURES:

Milestones:

- Accurate mapping of broadband speeds across the region
- Increased technological options for broadband

Metrics:

- Households with access to ultra-high-speed broadband coverage
- WiFi Internet connection accessibility in public places



GOAL 2:

Challenge 4: Treatment services are expanding beyond the traditional hospital and private doctor office paradigm. Providing services in closer proximity to where people live and work in a quick and effective fashion is becoming the trend.

The importance of the Piedmont Triad's hospitals and healthcare facilities cannot be overstated. Wake Forest Baptist Medical Center, Moses Cone Health Care System, Novant Health, and others are all large hospital systems and provide high levels of health care services throughout the region.

Health and wellness are just as important to economic development in the Piedmont Triad as business recruitment. Communities have all types of capital - financial, physical, economic, and political - but community health capital is critical to ensuring a robust and resilient workforce.

Healthy communities represent a desirable place to live, to own a business, and to have a more desirable, productive, and efficient workforce that is less expensive to employ. According to the Center for Disease Control, chronic diseases are the most common and costly of all health problems, but they are also the most preventable.

Four common health damaging, but modifiable behaviors - tobacco use, insufficient physical activity, poor eating habits, and excessive substance abuse - are responsible for much of the illness, disability, and premature death related to chronic diseases.

Therefore, the Piedmont Triad must make conscious and purposeful decisions to support the healthcare system throughout the region by working to identify healthcare training needs and demands, support career pathways for nursing and other healthcare related fields, and support healthcare education and training to increase the healthcare workforce.



STRATEGIES AND TACTICS:

1. Support increased healthcare facility access.

1.1 Support increased use of clinics to provide accessible healthcare assistance

1.2 Create public-private healthcare coalitions working with nonprofits to deliver additional healthcare services

1.3 Support the development of new innovative practices like tele-doctor visits



PERFORMANCE MEASURES:

Milestones:

- Identification of healthcare delivery models that increase access for rural areas
- Allocation of resources to support health care clinics in underserved areas

Metrics:

- Households within 15 minute drive or bus trip to health care clinic

GOAL 2:

Challenge 5: According to the U.S. Census 2015 American Community Survey, 47.7% of American renters are cost-burdened, meaning they spend more than 30% of their income on housing costs. The N.C. Housing Coalition has found that nearly 43% of renters earn less than the average hourly wage (\$15.32) required to rent a two-bedroom apartment.

Nearly every city and town in the Piedmont Triad has a vacant mill or factory that could be redeveloped for housing and other mixed uses. In several towns, developers have transformed industrial building into lofts, apartments, and “live-work” dwellings, and they have found singles, small families, and “empty nester’s” eager to live in these renovated places.

Housing costs are rising faster than wages, creating an increased strain on the availability of affordable housing options for working families and young workers. According to the National Housing Conference “working households” are those that work at least 20 hours per week but earn no more than 120 percent of the median income. Of these working households, about 19 percent, or about 279,000 households, are “severely housing cost burdened”, meaning those families spend at least 50% of their income on housing.

According to a report by Goldman Sachs Global Investment Research, as millennials enter their peak home-buying years, their reluctance to enter the housing market could change. However, due to housing costs, student loan debt, and other conditions, the majority of 18-34 year olds are “snug in the nest” and choosing to live at home instead. But millennials want to be homeowners, according to Trulia, 93% of millennials say they want to own a home sometime in the future.



The heavy financial burden that housing costs bring upon so many of North Carolina’s working families can translate into lower productivity, as workers spend an inordinate amount of time searching for affordable housing options or commuting long distances.

The Piedmont Triad must take proactive steps to provide an affordable housing stock for past, present, and future generations. Urban downtown centers are capitalizing on apartments and multi-family housing options, but more could be done in terms of affordability and access for all walks of life.

STRATEGIES AND TACTICS:

- 1 Expand and diversify the affordable housing stock in areas near employment centers, Opportunity Zones, and existing infrastructure.
 - 1.1. Define and identify the rural and urban areas of deficiency within existing affordable housing stock across the Piedmont Triad.
 - 1.2 Collaborate with State efforts to develop a state-wide housing strategy aimed at improving affordable renter and owner-occupied housing stock for workers and families living in rural and downtown settings.
 - 1.3 Coordinate existing housing programs and financial incentives to incorporate best practices in affordable housing investments.

PERFORMANCE MEASURES:

Milestones:

- Inventory of regional housing stock condition, age, etc. affordable to workers making 120% or less of the average wage
- Use resources for the rehabilitation of affordable housing supply to improve living conditions and health outcomes

Metrics:

- Increased energy efficiency and condition of existing housing stock available to workers earning less than 120% of the average wage
- Coordination on best practices and administration of housing authorities



GOAL 3:

CREATE VIBRANT, HEALTHY, AND RESILIENT COMMUNITIES

The Piedmont Triad will take a more intentional approach to providing healthy lifestyle options as a way to attract the best and brightest, while minimizing the cost of health insurance and medical care for companies and citizens.

Challenge 1: Enhancing the vitality of the region's downtown's as healthy commercial and social centers of the community

The main streets of Piedmont Triad communities are the front door and first impressions that residents and visitors experience and interact with. Providing unique experiences, areas to walk and bicycle, shop or meet up in public spaces is vital to keeping the heart and soul of the community alive.

Workers, visitors, and families may look for these experiences at the large urban scale or at the small town level. Additionally, access to quality and affordable housing, transportation options to work, school, shopping or healthcare is critical to draw residents that are important to creating vibrant communities.

Inadequate infrastructure for walking and biking has become an important safety issue for pedestrians and bicyclists. At the heart of this issue are suburban development patterns that provide few sidewalks, limited common space for outdoor exercise, and limited choices for individuals seeking to bicycle, run, or even walk.

Research suggests that citizens are demanding new lifestyle choices, and there is a tremendous public interest in providing options that offer a healthier lifestyle.

Embracing demographic and cultural changes is an opportunity, not a threat to a community's way of life; in fact, it is a critical first step towards resiliency. There is no one tactic or strategy that a community can make to suddenly become "cool" or "the place to be." Much like regional infrastructure, collaboration and cooperation in developing and leveraging key community assets will be a way to adjust to the changing world. Local, regional, state and federal partners may also provide technical or financial resources to support key tactics or strategies towards vibrant, healthy, and resilient community investments.





STRATEGIES AND TACTICS:

1. Enhancing the vitality of the region's downtowns as healthy commercial and social centers of the community.
 - 1.1 Promote functional, efficient, and aesthetically-pleasing design that supports economic, environmental, and social interests.
 - 1.2 Promote flexible land use policies and regulations allowing higher densities and wider mixture of uses in redevelopment areas and town centers
 - 1.3 Develop regional approaches to leverage reinvestment by commercial property owners, especially absentee landlords, and private investment.

PERFORMANCE MEASURES:

Milestones

- Inventory of development ordinance and regulations that allow a variety of mixed-use options in downtowns or activity centers
- Provide trainings on best practices for creating vibrant, healthy, and disaster resilient communities

Metrics

- Re-investment in underutilized properties in key commercial, industrial or downtown areas
- Development ordinance modernization updates
- Designated Main Street Communities

GOAL 3:

Challenge 2: Promoting the agricultural economy through organization, connectivity, and collaboration between local farms and urban centers.

STRATEGIES AND TACTICS:

1. Develop a region-wide local food network to assist in continuing assessments of market supply/demand and leveraging other opportunities.

- 1.1 Work with buyers, chefs, restaurant associations, healthcare partners, educational institutions, and other buying groups to determine demand for specific products and connect producers with buying opportunities.
- 1.2 Explore the possibility of establishing region-wide distribution systems to support the transportation of fresh produce across the region.
- 1.3 Support programs that provide processing capacity for those food and meat producers that are too small to serve commodity markets, but too large to sell directly to consumers.
- 1.4 Connect local growers and food producers to the region's network of agricultural research centers and professionals.
- 1.5 Serve as a leader to support equity and inclusion in all local food initiatives throughout the region by providing training, resources, and guidance to local agencies.

2. Establish food policy councils in each county to assess co-ops, and collectives, supply chain development, and agritourism.

- 2.1 Ensure broad levels of participation including multiple sectors of the food system including schools, nonprofits, farmers, recycling and waste organizations.
- 2.2 Facilitate meaningful cooperation and understanding among local food councils and grassroots organizations to maximize impact and improve the local food economy.
- 2.3 Support best practices for the creation of new markets across the region, both through farmers markets and through innovative approaches to the local food supply chain.

PERFORMANCE MEASURES:

Milestones:

- Develop and update regional food network to identify areas of improvement, investment and opportunity
- Collaboration among Piedmont Triad food policy councils and food stakeholders
- Complete Food System Assessment and approve a framework for data collection in partnership with local agencies to support long-term data and metrics about the regional food system.
- Increase the number of collaborative projects undertaken each year with local food council and advocate partners.

Metrics:

- Consumption of local food
- Increased number of jobs in the Food and Beverage Industries identified in the NAICS codes used in the Food System Assessment
- Implementation of recommendations from Food System Assessment
- Increased partnerships formed between producers and potential markets
- Leveraging of resources to support value-added food production
- Number of trainings, resources, and/or guidance conversations with local agencies to increase equity in the food system



GOAL 3:

Challenge 3: Promote the efficient and resilient use of land and resources

GOAL 3 CHALLENGE 2 & 3

STRATEGIES AND TACTICS:

- 1 Foster the efficient and resilient use of land resources to increase the benefits and reduce the costs of future growth**
 - 1.1 Foster the assessment, clean-up and redevelopment of old commercial and industrial sites and promote smart growth methods when constructing new sites for future redevelopment.
 - 1.2 Pursue growth policies and regulations to support the efficient use of existing water, sewer, and transportation infrastructure
 - 1.3 Encourage infrastructure design and plans to support sustainable and resilient community development patterns and principles, reducing the negative impacts of climate change.
 - 1.4 Use regional programs to support efficient transportation land use and planning like PTRCV (Piedmont Triad Community VIZ).

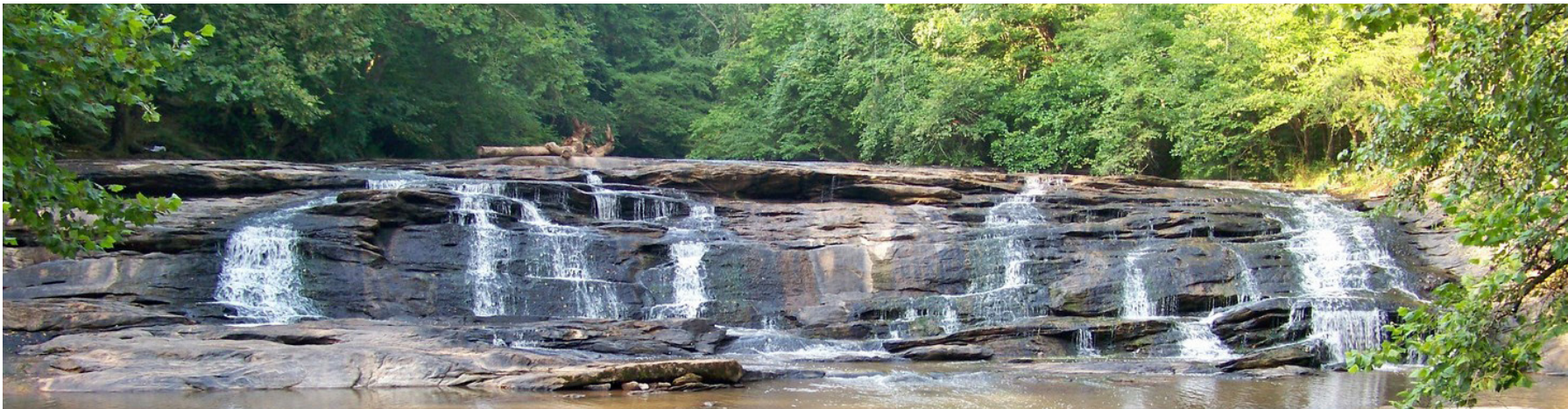
PERFORMANCE MEASURES:

Milestone:

- Complete a community engagement strategy geared towards building engagement capacity at the community and municipal level.
- Use local, county, or regional hazard mitigation plans to encourage disaster resilient communities.

Metrics:

- Shared-use agreements and policies for community facilities
- Bicycle share programs
- Public-private partnerships for community engagement
- Increased civic participation of underserved communities in surveys, public meetings and events
- Reduce the time needed for communities to access resources to recover from disasters



GOAL 4: DEVELOP TALENTED AND INNOVATIVE PEOPLE

The key competitive asset for businesses in the 21st century, the Piedmont Triad strives to prepare the flexible, entrepreneurial, globally-oriented, and skilled workers with cross-cutting competencies sought by employers.

Challenge 1: The workforce, education, and other State systems are fragmented and lack regional alignment.

Talent represents the skills, knowledge and abilities consistent with preparing for and providing value in the workplace. Our region needs to employ a wide range of multi-faceted strategies to successfully address this critical workforce development trend.

Not everyone is at the same station in life. People have different capacities and skill sets to develop. A higher baseline of educational attainment, training for citizens of all ages to “learn how to learn,” and providing for greater adaptability, will all become paramount in the emerging global economy.

Piedmont Triad companies consistently indicate the need for more workers, and as unemployment rates fall, finding, attracting, and training new workers will continue to be a challenge. The Piedmont Triad has a wide range of economic assets, resources, and opportunities, urban and rural, large and small, wealthy and underserved. By marshalling resources and fostering collaboration at a regional scale, we have the potential to build a resilient economy with a highly skilled workforce.

The Piedmont Triad has a network of workforce education and training programs designed to meet many labor force skill requirements. They are frequently demand-driven and customer-focused, but they offered in an ad hoc manner with little emphasis on strategic economic development purposes.

These programs also tend to be driven by vocational tracks rather than developing cross-cutting skill sets that can be applied to any advanced manufacturing processes. Past efforts to bring these systems into alignment have experienced only limited success. The Piedmont Triad must commit to developing more business-driven, strategic workforce initiatives - organized to emphasize the needs of the state’s primary economic development employers and targets.



STRATEGIES AND TACTICS:

- 1 Launch regional sector (or industry) workforce initiatives designed to align training and educational options to the skill demands for critical, in-demand occupations**
 - 1.1 Design, deploy, and consolidate regional initiatives and organizations to align job-skill requirements with training curriculum and programs
 - 1.2 Expand awareness and access to online degree completion or other online job training programs.
- 2 Address the unique challenges of adult workers seeking career transition.**
 - 2.1 Help veterans and service personnel exiting the military find jobs in the Piedmont Triad, especially those with in-demand technical skills.

PERFORMANCE MEASURES:

Milestones:

- Complete and implement Triad Talent Alignment Strategy

Metrics:

- Job skills training programs aligning with workforce needs
- Employment of veterans



GOAL 4:

Challenge 2: The workforce of the Piedmont Triad lacks the necessary skills to fill the jobs gap - addressing the underdeveloped capacity of the workplace will be critical to meeting current and future workforce demands.

STRATEGIES AND TACTICS:

1. Develop a skilled workforce with adequate soft and technical skills

1.1 Increase innovative career pathways in counseling and training that prepare workers for in-demand jobs.

1.2 Implement career pathways program.

2. Prepare youth and unemployed individuals for in-demand jobs based upon industry demands and workforce needs

2.1 Develop a consortium of foundation, education and community organizations to develop greater high quality childcare access.

2.2 Advocate K-12 educational methodology that advances more technological components with real world connectivity.

2.3 Provide industry/high school connectivity for internships, apprenticeships, and post-high school opportunities.



3. Inventory and align regional workforce development resources to ensure a seamless delivery of services

3.1 Expand promotion of career and technical educational opportunities in new areas like advanced manufacturing and creative industries (e.g. Dream It, Do It)

4. Utilize public-private partnerships for workforce development

4.1 Develop a youth work ethics and career readiness certification (CRC) program in each county

4.2 Research workforce development best practices through a collaborative workspace

4.4 Develop mentoring programs for increased training-to-work efforts



PERFORMANCE MEASURES:

Milestones:

- Increase coordination of workforce development initiatives

Metrics

- High schools collaborating with regional industries on training
- Public-private partnerships for job skills training

Regional business and education leaders initiated the Talent Alignment Strategy for the Piedmont Triad in August 2017. The purpose of this Strategy is to ensure education and workforce development efforts are aligned with the needs of employers and to coordinate existing education and workforce development initiatives currently underway throughout the region. Ultimately the project aims to create the next generation workforce that the Triad region will need to propel its economy forward.

Avalanche Consulting and the Council for Adult and Experiential Learning (CAEL) were engaged to facilitate and prepare the Strategy, to include the following:

- Phase 1: Workforce Analysis
- Phase 2: Supply-Demand Gap Analysis
- Phase 3: Talent Alignment Strategy

GOAL 4:

Challenge 3: Areas of the region lack an entrepreneurial ecosystem to encourage the development of new and innovative businesses to support a resilient economy.

STRATEGIES AND TACTICS:

1. **Implement and promote direct entrepreneurial education and technical assistance efforts**
 - 1.1 Promote startup competitions, business students assistance to small business owners through entrepreneurship education programs
 - 1.2 Increase the capacity and connectivity with youth related entrepreneurship organizations to build entrepreneurship capacity.
 - 1.3 Fully utilize current assets and resources including: Small Business Centers, Business and Technology Development Centers, cooperative extension, rural development services, business incubators, the State's Business Link (BLNC) referral services, and local SCOPE chapters to increase knowledge and capacity.
2. **Promote and support the development of entrepreneurial work spaces and facilities**
 - 2.1 Encourage the development of business incubators and shared start-up workspaces
 - 2.2 Facilitate the co-location of multiple resource agencies to provide on-site expertise (e.g. community college programs, etc.)
 - 2.3 Identify multiple revenue streams to fund entrepreneurial projects through crowd-funding, angel investment opportunities, and investment programs.
 - 2.4 Pursue the development of rural co-working spaces to support rural entrepreneurship





STRATEGIES AND TACTICS:

3. Assess regional capacities for entrepreneurial mentorship and internship opportunities

- 3.1 Identify the supply and demand for mentorship and internship opportunities with an emphasis on the needs of underserved populations and immigrant populations
- 3.2 Develop an asset map of entrepreneurial initiatives, programs, spaces, and other resources around the region including federal, state, regional, university, county, and municipal resources.

PERFORMANCE MEASURES:

Milestones:

- Assessment of regional capacity for entrepreneurial support systems
- Support development of entrepreneurial work spaces and facilities

Metrics

- Co-work space locations
- Competitions and events geared toward entrepreneur support

GOAL 4 CHALLENGE 3

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
 3. NC Office of Budget and Management 2028/2038 Population Projections
 4. US Census Bureau, American Community Survey, 5-Year Data (2014-2018)
 5. NC Commerce, Local Area Unemployment Statistics 2018
 6. Feeding America, 2018 Overall Food Insecurity

7. NC Commerce, Quarterly Census Employment & Wages, 2018
 8. Economic Impact Studies, Visit North Carolina, 2018
 9. PTRC GIS Analysis from Regional Recreation Database
 10. US Census Bureau, LEHD Origin-Destination Employment Statistics 2017
 11. National Land Cover Database 2016
 12. USDA Census 2017



HOUSING ⁴

Median Home Value
\$144,273

Occupied Housing Units
671,443

Vacancy Rate
11.6%

Rental Rate
34.7%

Average Monthly Rental Rate
\$773

POPULATION

2010 Census ¹
1,640,717

2018 Estimate ²
1,730,316

2028 Projection ³
1,885,153

2038 Projection ³
2,047,050

2018 Population Details ²

Median Age	38.5	Ages 0-17	22%
Female	52%	Ages 18-34	23%
Male	48%	Ages 35-64	39%
Minority	38%	Ages 65+	17%

ECONOMICS ⁴

Median Household Income
\$48,167

Per Capita Income
\$27,476

% Families Below Poverty Level
12.2%

Labor Force Participation
60.9%

Unemployment Rate ⁵
4.0%

Food Insecurity Rate ⁶
14.0%



LAND COVER ¹¹

Percent Forest
55%

Percent Agriculture
21%

Percent Developed
19%



TOURISM

Visitor Spending (Millions) ⁸
\$3,322.63

Tax Revenues (Millions) ⁸
\$256.45

Existing Trails (Miles) ⁹
667

Parks & Open Space ⁹
168 - Square Miles
107,442 - Acres

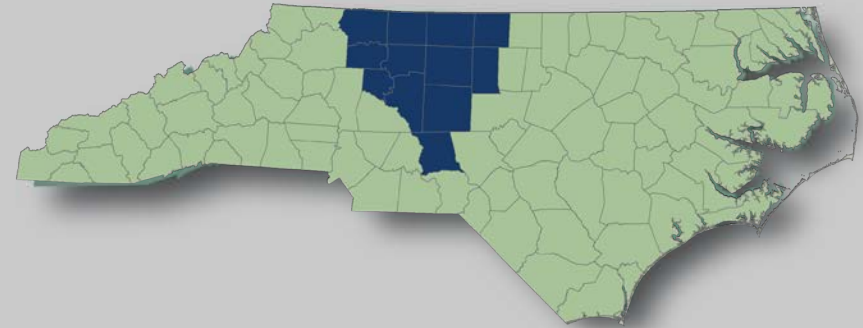


PIEDMONT TRIAD REGION



AGRICULTURE ¹²

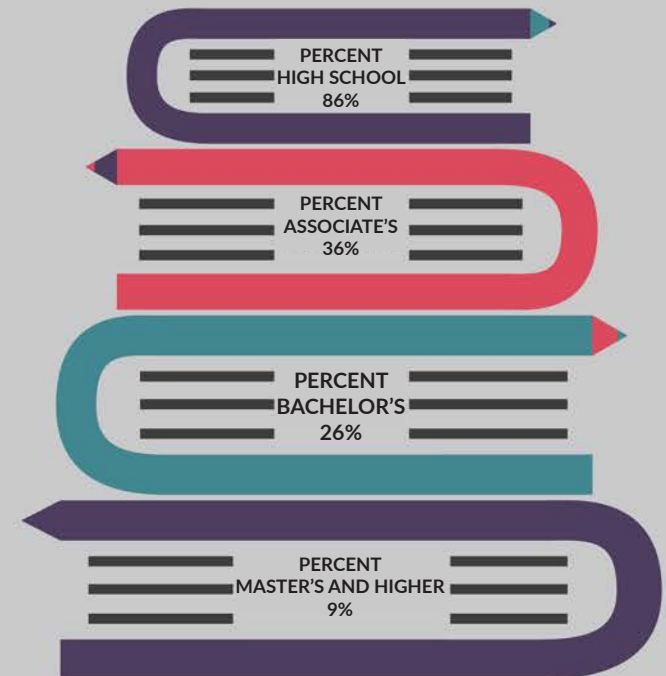
Value of All Crops	\$261,105,000	Number of Farms	9,408
Value of Animal Products	\$832,071,000	Acres of Farms	1,104,222
Total Farm Income	\$36,349,000	Direct to Consumer Sales	\$9,770,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	15.0%	\$50,071
Manufacturing	14.6%	\$54,267
Retail Trade	11.5%	\$28,246
Accommodation and Food Service	9.4%	\$16,604
Educational Services	8.6%	\$48,421

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	723,102	Inflow of Workers	168,724
Live and Work in Region	554,378	Outflow of Workers	184,990

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
 3. NC Office of Budget and Management 2028/2038 Population Projections
 4. US Census Bureau, American Community Survey, 5-Year Data (2014-2018)
 5. NC Commerce, Local Area Unemployment Statistics, 2018
 6. Feeding America, 2018 Overall Food Insecurity

7. NC Commerce, Quarterly Census Employment & Wages, 2018
 8. Economic Impact Studies, Visit North Carolina, 2018
 9. PTRC GIS Analysis from Regional Recreation Database
 10. US Census Bureau, LEHD Origin-Destination Employment Statistics 2017
 11. National Land Cover Database 2016
 12. USDA Census 2017



HOUSING ⁴

Median Home Value
\$147,800

Occupied Housing Units
64,059

Vacancy Rate
8.2%

Rental Rate
35.0%

Average Monthly Rental Rate
\$798

POPULATION

2010 Census ¹
151,131

2018 Estimate ²
166,352

2028 Projection ³
189,141

2038 Projection ³
206,717

2018 Population Details ²

Median Age	39.7	Ages 0-17	22%
Female	53%	Ages 18-34	23%
Male	47%	Ages 35-64	38%
Minority	36%	Ages 65+	17%

ECONOMICS ⁴

Median Household Income
\$45,735

Per Capita Income
\$26,215

% Families Below Poverty Level
12.7%

Labor Force Participation
62.4%

Unemployment Rate ⁵
3.8%

Food Insecurity Rate ⁶
14.0%



LAND COVER ¹¹

Percent Forest
48%

Percent Agriculture
29%

Percent Developed
18%



TOURISM

Visitor Spending (Millions) ⁸
\$201.59

Tax Revenues (Millions) ⁸
\$15.29

Existing Trails (Miles) ⁹
46

Parks & Open Space ⁹
3 - Square Miles
2,178 - Acres

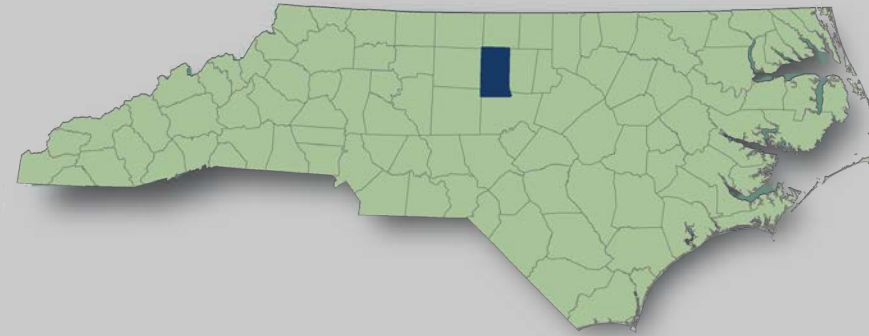


ALAMANCE COUNTY



AGRICULTURE ¹²

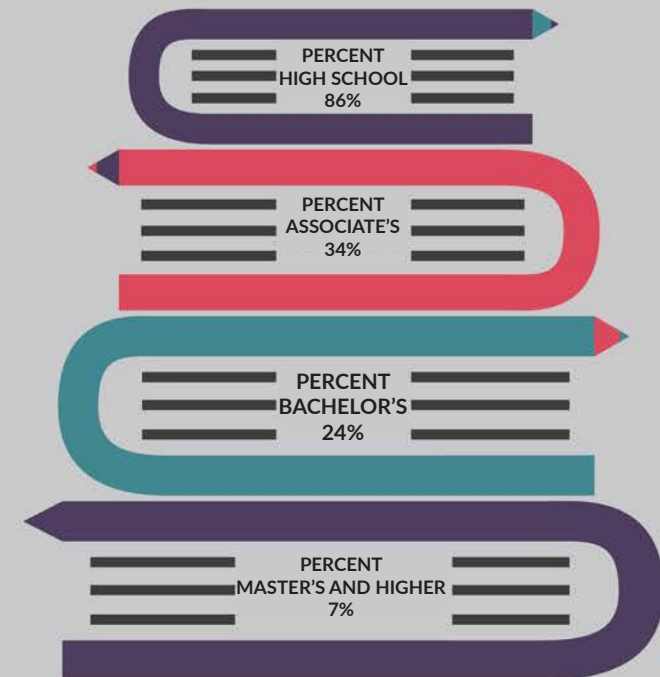
Value of All Crops	\$14,739,000	Number of Farms	720
Value of Animal Products	\$27,011,000	Acres of Farms	80,042
Total Farm Income	\$1,577,000	Direct to Consumer Sales	\$787,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	16.8%	\$55,522
Manufacturing	15.1%	\$49,719
Retail Trade	15.1%	\$25,828
Accommodation and Food Service	12.2%	\$15,530
Educational Services	9.3%	\$45,371

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	63,404	Inflow of Workers	32,168
Live and Work in County	31,236	Outflow of Workers	39,855

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
 3. NC Office of Budget and Management 2028/2038 Population Projections
 4. US Census Bureau, American Community Survey, 5-Year Data (2014-2018)
 5. NC Commerce, Local Area Unemployment Statistics 2018
 6. Feeding America, 2018 Overall Food Insecurity

7. NC Commerce, Quarterly Census Employment & Wages, 2018
 8. Economic Impact Studies, Visit North Carolina, 2018
 9. PTRC GIS Analysis from Regional Recreation Database
 10. US Census Bureau, LEHD Origin-Destination Employment Statistics 2017
 11. National Land Cover Database 2016
 12. USDA Census 2017



HOUSING ⁴

Median Home Value
\$109,100

Occupied Housing Units
9,110

Vacancy Rate
15.5%

Rental Rate
21.2%

Average Monthly Rental Rate
\$553

POPULATION

2010 Census ¹
23,719

2018 Estimate ²
23,618

2028 Projection ³
23,667

2038 Projection ³
23,667

2018 Population Details ²

Median Age	45.0	Ages 0-17	18%
Female	49%	Ages 18-34	20%
Male	51%	Ages 35-64	41%
Minority	39%	Ages 65+	21%

ECONOMICS ⁴

Median Household Income
\$43,961

Per Capita Income
\$22,982

% Families Below Poverty Level
13.3%

Labor Force Participation
54.3%

Unemployment Rate ⁵
4.4%

Food Insecurity Rate ⁶
15.9%



LAND COVER ¹¹

Percent Forest
70%

Percent Agriculture
21%

Percent Developed
5%



TOURISM

Visitor Spending (Millions) ⁸
\$9.48

Tax Revenues (Millions) ⁸
\$1.13

Existing Trails (Miles) ⁹
35

Parks & Open Space ⁹
28 - Square Miles
17,839 - Acres

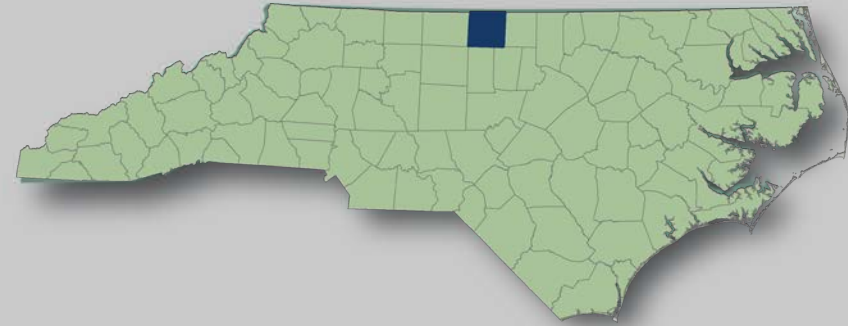


CASWELL COUNTY



AGRICULTURE ¹²

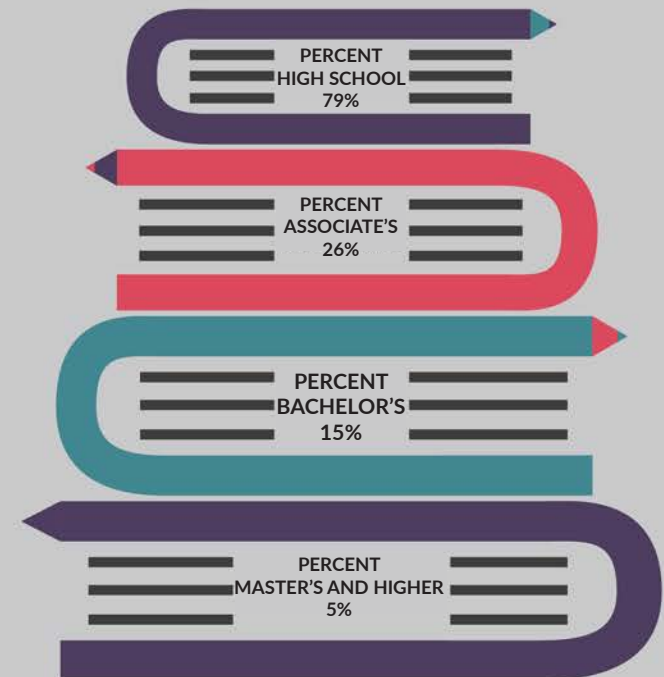
Value of All Crops	\$21,113,000	Number of Farms	493
Value of Animal Products	\$16,813,000	Acres of Farms	104,882
Total Farm Income	\$1,767,000	Direct to Consumer Sales	\$141,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Public Administration	20.8%	\$33,667
Health Care and Social Assistance	11.3%	\$36,848
Construction	9.6%	\$46,915
Retail Trade	9.3%	\$20,198
Manufacturing	7.1%	\$51,852

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	3,046	Inflow of Workers	1,863
Live and Work in County	1,183	Outflow of Workers	8,548

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
 3. NC Office of Budget and Management 2028/2038 Population Projections
 4. US Census Bureau, American Community Survey, 5-Year Data (2014-2018)
 5. NC Commerce, Local Area Unemployment Statistics 2018
 6. Feeding America, 2018 Overall Food Insecurity

7. NC Commerce, Quarterly Census Employment & Wages, 2018
 8. Economic Impact Studies, Visit North Carolina, 2018
 9. PTRC GIS Analysis from Regional Recreation Database
 10. US Census Bureau, LEHD Origin-Destination Employment Statistics 2017
 11. National Land Cover Database 2016
 12. USDA Census 2017



HOUSING ⁴

Median Home Value
\$137,000

Occupied Housing Units
65,471

Vacancy Rate
11.9%

Rental Rate
29.9%

Average Monthly Rental Rate
\$694

POPULATION

2010 Census ¹
162,878

2018 Estimate ²
167,825

2028 Projection ³
182,166

2038 Projection ³
196,268

2018 Population Details ²

Median Age	42.1	Ages 0-17	21%
Female	51%	Ages 18-34	20%
Male	49%	Ages 35-64	41%
Minority	21%	Ages 65+	18%

ECONOMICS ⁴

Median Household Income
\$47,271

Per Capita Income
\$25,109

% Families Below Poverty Level
11.7%

Labor Force Participation
60.5%

Unemployment Rate ⁵
3.7%

Food Insecurity Rate ⁶
14.1%



LAND COVER ¹¹

Percent Forest
56%

Percent Agriculture
23%

Percent Developed
16%



TOURISM

Visitor Spending (Millions) ⁸
\$176.22

Tax Revenues (Millions) ⁸
\$15.57

Existing Trails (Miles) ⁹
11

Parks & Open Space ⁹
2 - Square Miles
1,422- Acres

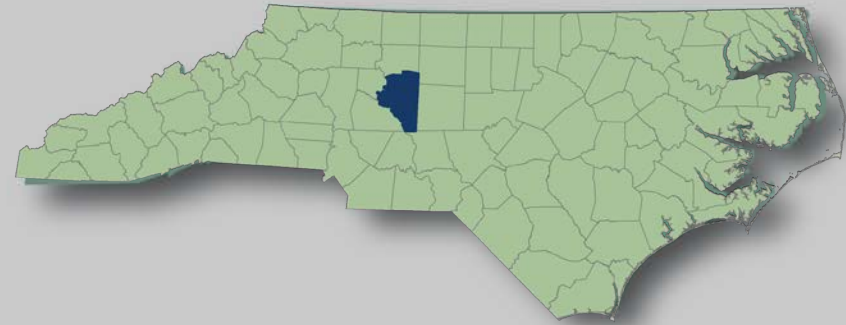


DAVIDSON COUNTY



AGRICULTURE ¹²

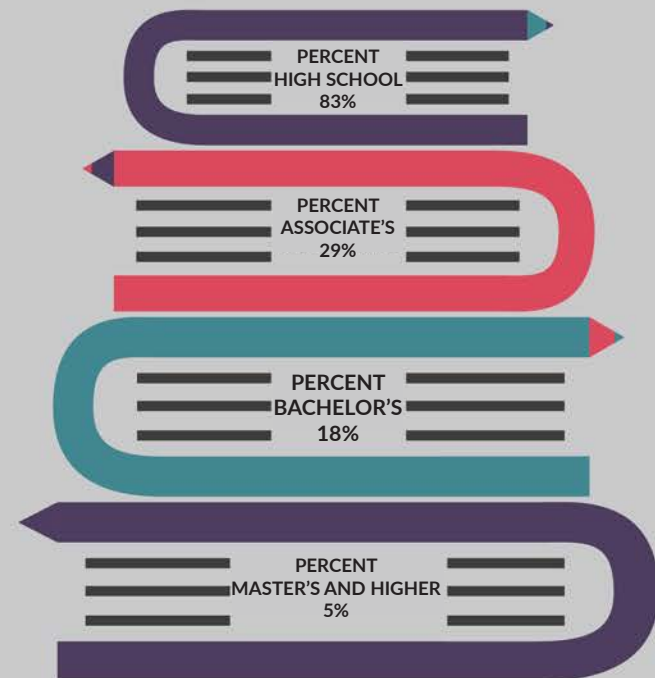
Value of All Crops	\$16,223,000	Number of Farms	1,003
Value of Animal Products	\$30,847,000	Acres of Farms	92,359
Total Farm Income	\$1,997,000	Direct to Consumer Sales	\$620,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	22.2%	\$49,294
Retail Trade	11.7%	\$26,272
Health Care and Social Services	11.1%	\$39,539
Educational Services	9.0%	\$37,972
Accommodation and Food Service	8.4%	\$14,813

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	44,981	Inflow of Workers	23,135
Live and Work in County	21,846	Outflow of Workers	51,983

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
 3. NC Office of Budget and Management 2028/2038 Population Projections
 4. US Census Bureau, American Community Survey, 5-Year Data (2014-2018)
 5. NC Commerce, Local Area Unemployment Statistics 2018
 6. Feeding America, 2018 Overall Food Insecurity

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HOUSING ⁴

Median Home Value
\$172,700

Occupied Housing Units
15,999

Vacancy Rate
13.9%

Rental Rate
22.2%

Average Monthly Rental Rate
\$735

POPULATION

2010 Census ¹	2018 Population Details ²	
41,240	Median Age	Ages 0-17
2018 Estimate ²	44.3	20%
42,826	Female	Ages 18-34
2028 Projection ³	51%	20%
48,483	Male	Ages 35-64
2038 Projection ³	49%	40%
54,132	Minority	Ages 65+
	16%	20%

ECONOMICS ⁴

Median Household Income
\$57,611

Per Capita Income
\$29,613

% Families Below Poverty Level
10.0%

Labor Force Participation
59.6%

Unemployment Rate ⁵
3.5%

Food Insecurity Rate ⁶
12.6%



LAND COVER ¹¹

Percent Forest
52%

Percent Agriculture
35%

Percent Developed
9%



TOURISM

Visitor Spending (Millions) ⁸
\$39.47

Tax Revenues (Millions) ⁸
\$2.90

Existing Trails (Miles) ⁹
4

Parks & Open Space ⁹
1 - Square Mile
270 - Acres

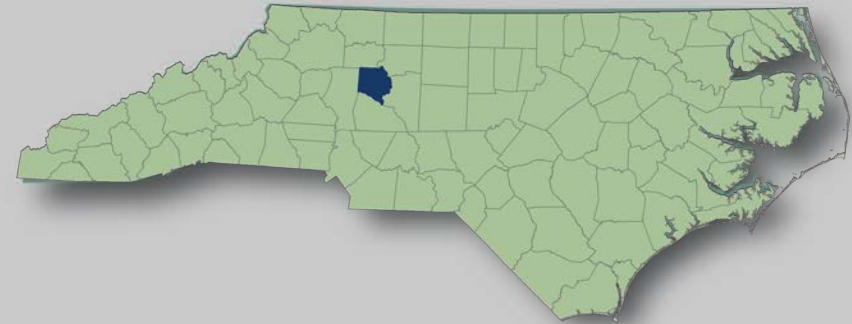


DAVIE COUNTY



AGRICULTURE ¹²

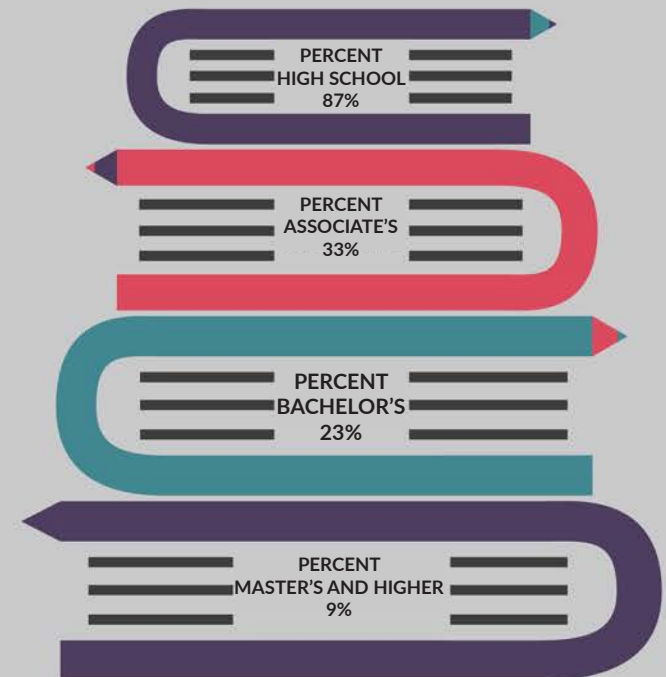
Value of All Crops	\$12,380,000	Number of Farms	591
Value of Animal Products	\$14,551,000	Acres of Farms	76,993
Total Farm Income	\$1,656,000	Direct to Consumer Sales	\$128,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	26.3%	\$44,431
Retail Trade	11.4%	\$24,992
Administration and Support	10.5%	\$27,590
Health Care and Social Services	9.2%	\$40,047
Accommodation and Food Service	7.7%	\$14,631

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	12,780	Inflow of Workers	8,432
Live and Work in County	4,348	Outflow of Workers	13,638

1. US Census Bureau, 2010 Census
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HOUSING ⁴

Median Home Value
\$154,500

Occupied Housing Units
146,685

Vacancy Rate
10.2%

Rental Rate
38.5%

Average Monthly Rental Rate
\$791

POPULATION

2010 Census ¹
350,670

2018 Estimate ²
376,042

2028 Projection ³
411,187

2038 Projection ³
446,583

2018 Population Details ²

Median Age	37.9	Ages 0-17	23%
Female	53%	Ages 18-34	23%
Male	47%	Ages 35-64	38%
Minority	47%	Ages 65+	16%

ECONOMICS ⁴

Median Household Income
\$50,128

Per Capita Income
\$29,921

% Families Below Poverty Level
12.7%

Labor Force Participation
61.6%

Unemployment Rate ⁵
3.9%

Food Insecurity Rate ⁶
13.8%



LAND COVER ¹¹

Percent Forest
44%

Percent Agriculture
14%

Percent Developed
39%



TOURISM

Visitor Spending (Millions) ⁸
\$950.57

Tax Revenues (Millions) ⁸
\$73.32

Existing Trails (Miles) ⁹
82

Parks & Open Space ⁹
9 - Square Miles
6,003 - Acres

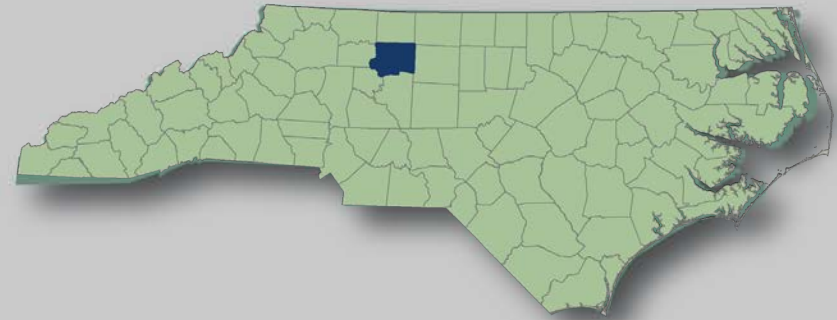


FORSYTH COUNTY



AGRICULTURE ¹²

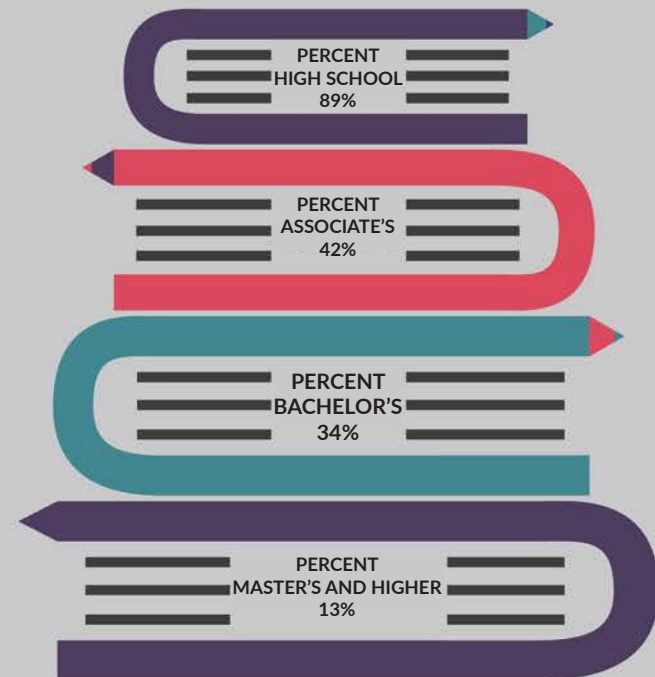
Value of All Crops	\$9,275,000	Number of Farms	557
Value of Animal Products	\$1,628,000	Acres of Farms	34,801
Total Farm Income	\$1,333,000	Direct to Consumer Sales	\$415,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	21.0%	\$55,225
Retail Trade	11.4%	\$28,750
Accommodation and Food Service	9.8%	\$17,595
Educational Services	9.3%	\$62,791
Manufacturing	8.5%	\$63,586

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	188,852	Inflow of Workers	97,975
Live and Work in County	90,877	Outflow of Workers	69,844

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
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HOUSING ⁴

Median Home Value
\$162,400

Occupied Housing Units
202,731

Vacancy Rate
10.6%

Rental Rate
41.1%

Average Monthly Rental Rate
\$850

POPULATION

2010 Census ¹
488,406

2018 Estimate ²
532,856

2028 Projection ³
599,917

2038 Projection ³
679,787

2018 Population Details ²

Median Age	37.2	Ages 0-17	22%
Female	53%	Ages 18-34	25%
Male	47%	Ages 35-64	38%
Minority	51%	Ages 65+	15%

ECONOMICS ⁴

Median Household Income
\$51,072

Per Capita Income
\$29,708

% Families Below Poverty Level
11.9%

Labor Force Participation
63.4%

Unemployment Rate ⁵
4.2%

Food Insecurity Rate ⁶
13.9%



LAND COVER ¹¹

Percent Forest
40%

Percent Agriculture
22%

Percent Developed
35%



TOURISM

Visitor Spending (Millions) ⁸
\$1,487.69

Tax Revenues (Millions) ⁸
\$110.42

Existing Trails (Miles) ⁹
170

Parks & Open Space ⁹
16 - Square Miles
10,329 - Acres

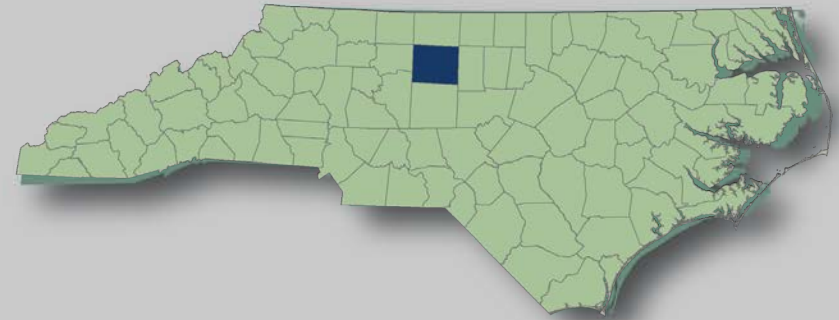


GUILFORD COUNTY



AGRICULTURE ¹²

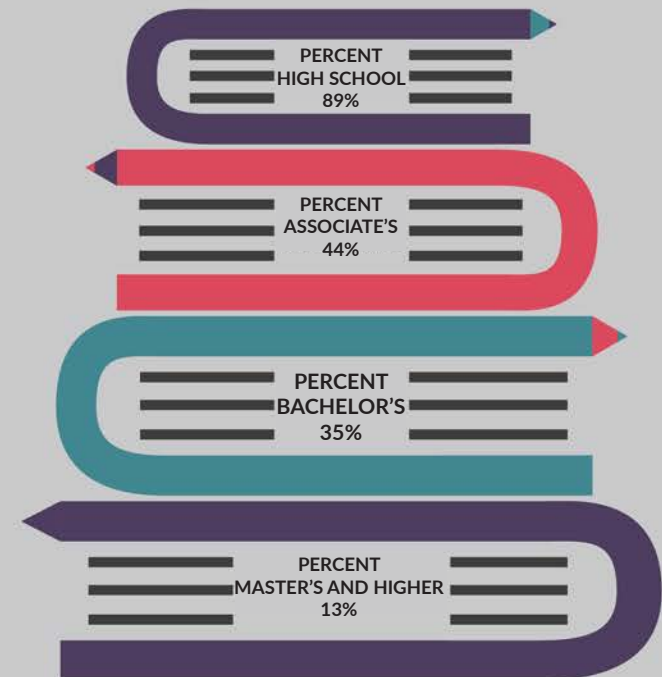
Value of All Crops	\$32,829,000	Number of Farms	854
Value of Animal Products	\$19,357,000	Acres of Farms	76,352
Total Farm Income	\$3,131,000	Direct to Consumer Sales	\$2,968,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	13.1%	\$49,881
Manufacturing	12.1%	\$65,553
Retail Trade	10.6%	\$30,677
Accommodation and Food Service	9.3%	\$17,412
Administration and Support	8.8%	\$30,195

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	283,837	Inflow of Workers	143,884
Live and Work in County	139,953	Outflow of Workers	89,461

1. US Census Bureau, 2010 Census
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HOUSING ⁴

Median Home Value
\$108,300

Occupied Housing Units
10,411

Vacancy Rate
35.9%

Rental Rate
27.3%

Average Monthly Rental Rate
\$575

POPULATION

2010 Census ¹
27,798

2018 Estimate ²
27,550

2028 Projection ³
28,069

2038 Projection ³
28,518

2018 Population Details ²

Median Age	41.9	Ages 0-17	22%
Female	53%	Ages 18-34	21%
Male	47%	Ages 35-64	37%
Minority	37%	Ages 65+	20%

ECONOMICS ⁴

Median Household Income
\$42,346

Per Capita Income
\$22,760

% Families Below Poverty Level
14.5%

Labor Force Participation
51.0%

Unemployment Rate ⁵
4.0%

Food Insecurity Rate ⁶
14.5%



LAND COVER ¹¹

Percent Forest
78%

Percent Agriculture
8%

Percent Developed
6%



TOURISM

Visitor Spending (Millions) ⁸
\$31.25

Tax Revenues (Millions) ⁸
\$4.68

Existing Trails (Miles) ⁹
121

Parks & Open Space ⁹
67 - Square Miles
42,691 - Acres

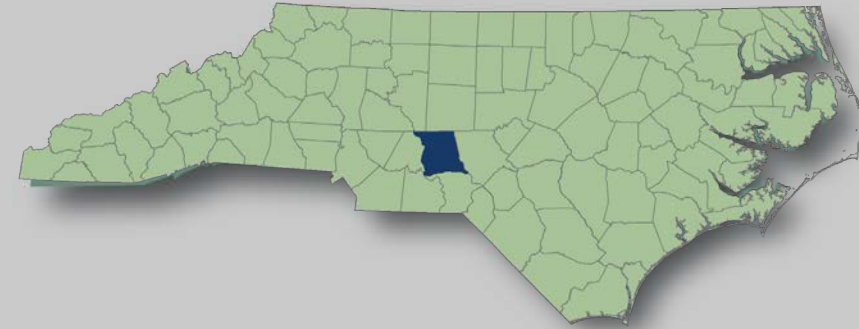


MONTGOMERY COUNTY



AGRICULTURE ¹²

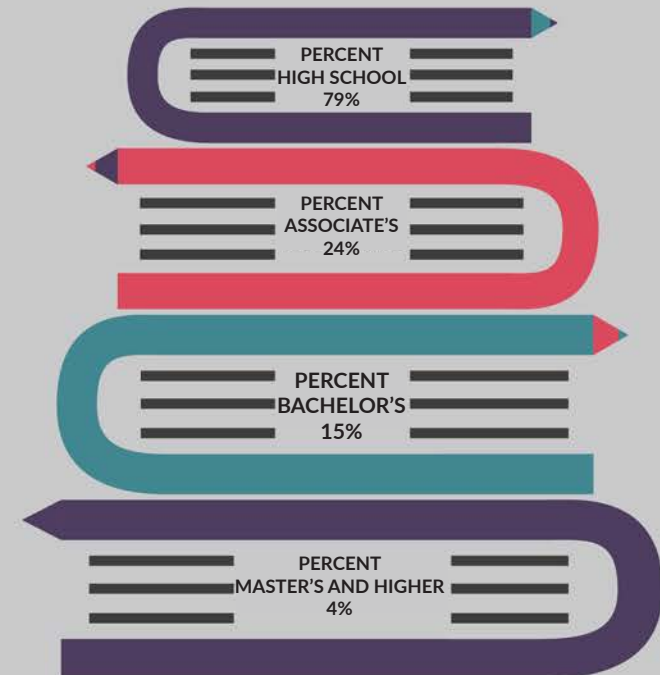
Value of All Crops	\$8,205,000	Number of Farms	240
Value of Animal Products	\$135,099,000	Acres of Farms	33,521
Total Farm Income	\$901,000	Direct to Consumer Sales	\$571,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	35.0%	\$41,442
Health Care and Social Assistance	12.2%	\$33,725
Retail Trade	9.9%	\$26,575
Educational Services	8.9%	\$37,164
Public Administration	8.2%	\$36,945

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	9,123	Inflow of Workers	5,548
Live and Work in County	3,575	Outflow of Workers	6,240

1. US Census Bureau, 2010 Census
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HOUSING ⁴

Median Home Value
\$120,800

Occupied Housing Units
56,041

Vacancy Rate
9.8%

Rental Rate
28.2%

Average Monthly Rental Rate
\$672

POPULATION

2010 Census ¹
141,752

2018 Estimate ²
143,958

2028 Projection ³
152,952

2038 Projection ³
161,881

2018 Population Details ²

Median Age	41.1	Ages 0-17	22%
Female	52%	Ages 18-34	21%
Male	48%	Ages 35-64	39%
Minority	22%	Ages 65+	17%

ECONOMICS ⁴

Median Household Income
\$45,006

Per Capita Income
\$24,127

% Families Below Poverty Level
11.3%

Labor Force Participation
60.9%

Unemployment Rate ⁵
3.8%

Food Insecurity Rate ⁶
13.8%



LAND COVER ¹¹

Percent Forest
60%

Percent Agriculture
24%

Percent Developed
11%



TOURISM

Visitor Spending (Millions) ⁸
\$153.58

Tax Revenues (Millions) ⁸
\$11.78

Existing Trails (Miles) ⁹
37

Parks & Open Space ⁹
19 - Square Miles
12,087 Acres

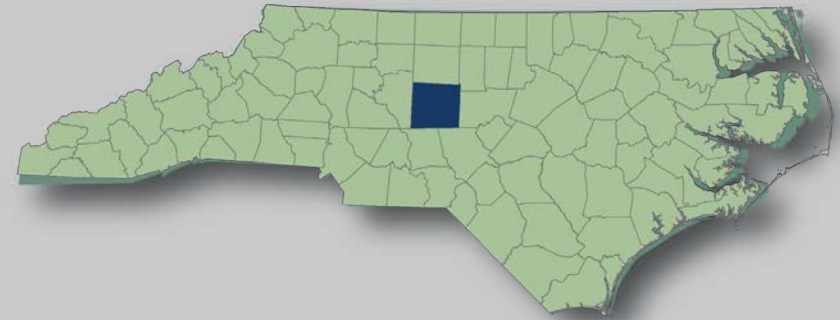


RANDOLPH COUNTY



AGRICULTURE ¹²

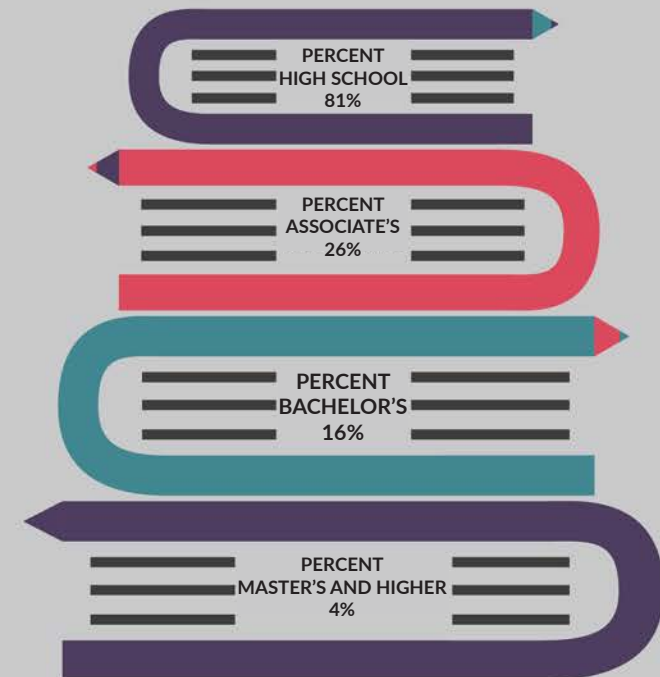
Value of All Crops	\$27,943,000	Number of Farms	1,368
Value of Animal Products	\$253,913,000	Acres of Farms	147,781
Total Farm Income	\$6,448,000	Direct to Consumer Sales	\$2,063,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	34.1%	\$40,844
Health Care and Social Services	9.6%	\$38,196
Retail Trade	9.2%	\$25,595
Accommodation and Food Service	7.9%	\$14,626
Educational Services	7.9%	\$38,543

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	46,449	Inflow of Workers	22,718
Live and Work in County	23,731	Outflow of Workers	37,815

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
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HOUSING ⁴

Median Home Value
\$111,400

Occupied Housing Units
37,201

Vacancy Rate
15.4%

Rental Rate
30.9%

Average Monthly Rental Rate
\$658

POPULATION

2010 Census ¹	2018 Population Details ²	
93,643	Median Age	Ages 0-17
2018 Estimate ²	44.1	20%
91,626	Female	Ages 18-34
2028 Projection ³	52%	20%
91,864	Male	Ages 35-64
2038 Projection ³	48%	40%
91,866	Minority	Ages 65+
	29%	20%

ECONOMICS ⁴

Median Household Income
\$42,490

Per Capita Income
\$23,604

% Families Below Poverty Level
14.2%

Labor Force Participation
56.3%

Unemployment Rate ⁵
4.6%

Food Insecurity Rate ⁶
15.2%



LAND COVER ¹¹

Percent Forest
63%

Percent Agriculture
22%

Percent Developed
11%



TOURISM

Visitor Spending (Millions) ⁸
\$75.28

Tax Revenues (Millions) ⁸
\$5.79

Existing Trails (Miles) ⁹
27

Parks & Open Space ⁹
4 - Square Miles
2,805 - Acres

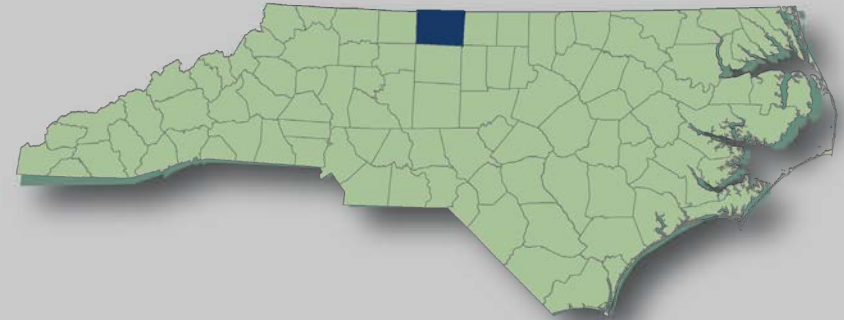


ROCKINGHAM COUNTY



AGRICULTURE ¹²

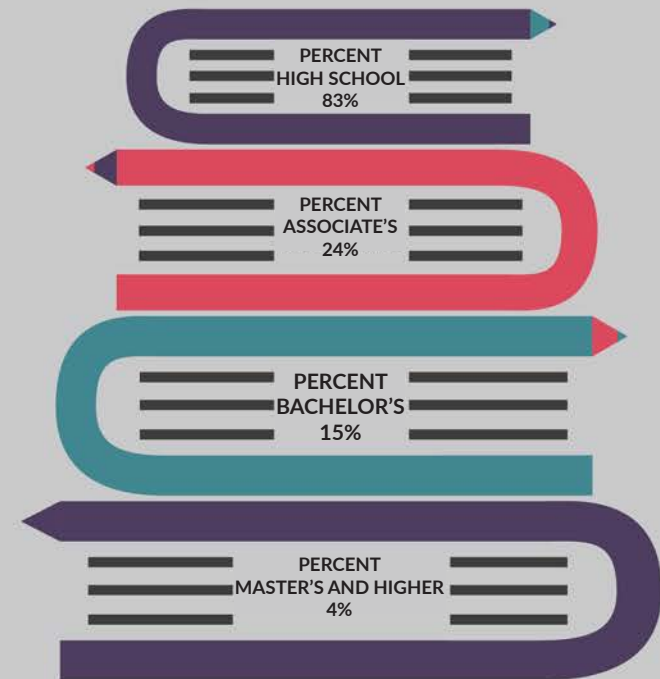
Value of All Crops	\$29,340,000	Number of Farms	844
Value of Animal Products	\$9,732,000	Acres of Farms	124,613
Total Farm Income	\$7,006,000	Direct to Consumer Sales	\$413,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	21.4%	\$43,714
Retail Trade	15.2%	\$25,230
Health Care and Social Services	12.3%	\$36,121
Accommodation and Food Service	8.6%	\$14,635
Educational Services	8.2%	\$37,581

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	25,150	Inflow of Workers	11,902
Live and Work in County	13,248	Outflow of Workers	25,762

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
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HOUSING ⁴

Median Home Value
\$128,600

Occupied Housing Units
19,302

Vacancy Rate
13.0%

Rental Rate
22.3%

Average Monthly Rental Rate
\$650

POPULATION

2010 Census ¹	2018 Population Details ²	
47,401	Median Age	Ages 0-17
2018 Estimate ²	45.6	18%
46,453	Female	Ages 18-34
2028 Projection ³	51%	20%
46,093	Male	Ages 35-64
2038 Projection ³	49%	42%
45,992	Minority	Ages 65+
	9%	20%

ECONOMICS ⁴

Median Household Income
\$46,169

Per Capita Income
\$25,091

% Families Below Poverty Level
11.5%

Labor Force Participation
58.3%

Unemployment Rate ⁵
3.7%

Food Insecurity Rate ⁶
13.0%



LAND COVER ¹¹

Percent Forest
70%

Percent Agriculture
19%

Percent Developed
8%



TOURISM

Visitor Spending (Millions) ⁸
\$26.20

Tax Revenues (Millions) ⁸
\$2.36

Existing Trails (Miles) ⁹
55

Parks & Open Space ⁹
11 - Square Miles
7,215- Acres

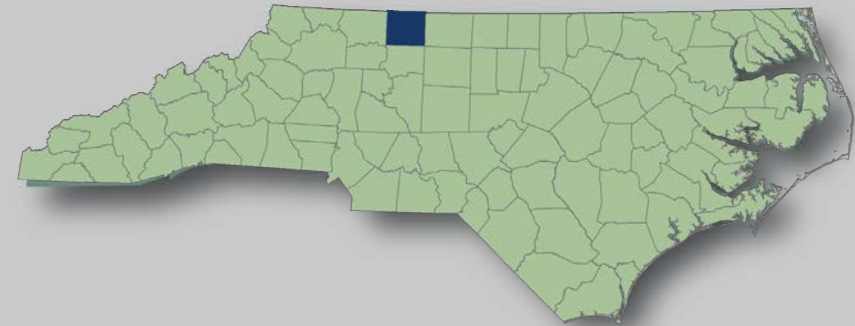


STOKES COUNTY



AGRICULTURE ¹²

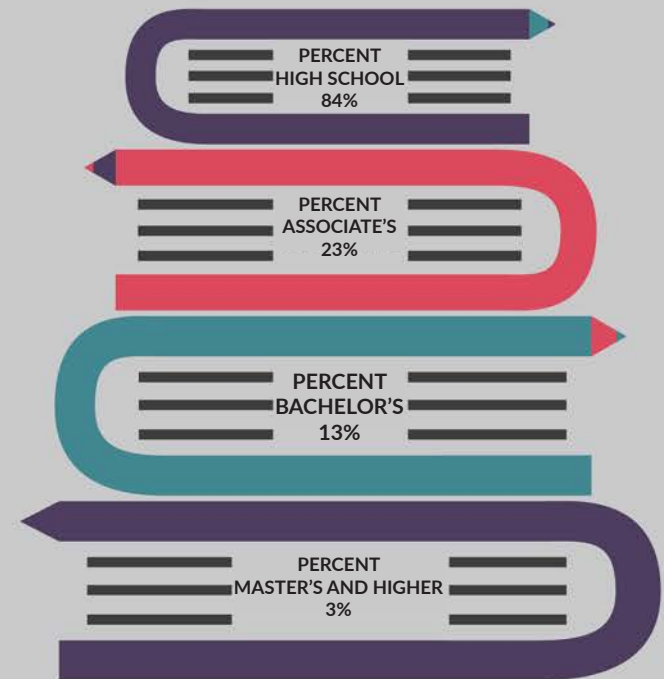
Value of All Crops	\$12,420,000	Number of Farms	856
Value of Animal Products	\$30,002,000	Acres of Farms	92,904
Total Farm Income	\$3,855,000	Direct to Consumer Sales	\$472,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Retail Trade	15.5%	\$23,743
Educational Services	14.6%	\$35,914
Healthcare and Social Services	13.2%	\$35,096
Accommodation and Food Service	11.7%	\$14,886
Manufacturing	10.6%	\$43,283

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	7,171	Inflow of Workers	4,484
Live and Work in County	2,687	Outflow of Workers	17,372

1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2018 Population Estimates
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HOUSING ⁴

Median Home Value
\$121,000

Occupied Housing Units
28,985

Vacancy Rate
14.8%

Rental Rate
27.8%

Average Monthly Rental Rate
\$620

POPULATION

2010 Census ¹
73,673

2018 Estimate ²
73,175

2028 Projection ³
73,232

2038 Projection ³
73,231

2018 Population Details ²

Median Age	42.9	Ages 0-17	21%
Female	51%	Ages 18-34	21%
Male	49%	Ages 35-64	39%
Minority	18%	Ages 65+	20%

ECONOMICS ⁴

Median Household Income
\$41,068

Per Capita Income
\$23,957

% Families Below Poverty Level
11.4%

Labor Force Participation
55.0%

Unemployment Rate ⁵
3.5%

Food Insecurity Rate ⁶
15.0%



LAND COVER ¹¹

Percent Forest
60%

Percent Agriculture
26%

Percent Developed
12%



TOURISM

Visitor Spending (Millions) ⁸
\$130.90

Tax Revenues (Millions) ⁸
\$10.06

Existing Trails (Miles) ⁹
71

Parks & Open Space ⁹
7 - Square Miles
4,315 - Acres



SURRY COUNTY



AGRICULTURE ¹²

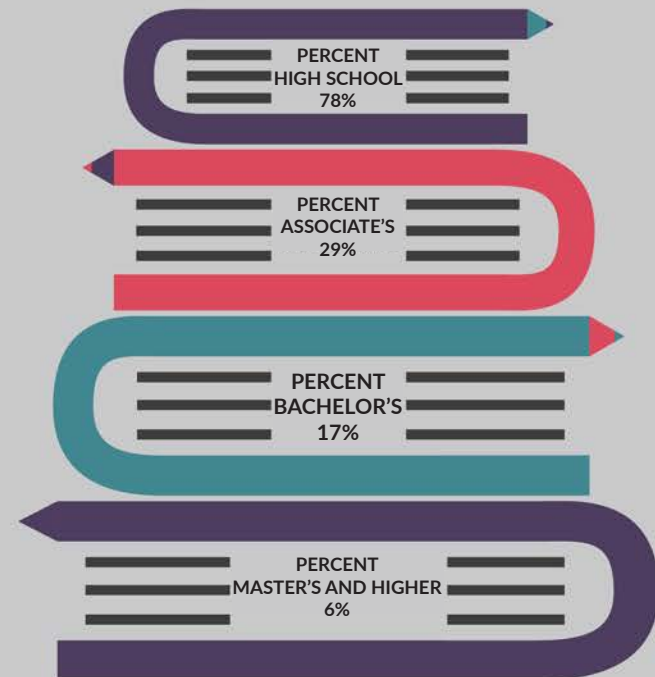
Value of All Crops	\$49,393,000	Number of Farms	1,064
Value of Animal Products	\$180,712,000	Acres of Farms	152,452
Total Farm Income	\$4,128,000	Direct to Consumer Sales	\$621,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Retail Trade	14.4%	\$25,813
Manufacturing	14.0%	\$39,505
Health Care and Social Assistance	13.9%	\$38,954
Construction	11.4%	\$57,680
Accommodation and Food Service	9.1%	\$14,473

EDUCATION ⁴



JOBS ¹⁰

Total Number of Jobs	28,255	Inflow of Workers	14,317
Live and Work in County	13,938	Outflow of Workers	15,757

1. US Census Bureau, 2010 Census
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 12. USDA Census 2017



HOUSING ⁴

Median Home Value
\$125,800

Occupied Housing Units
15,448

Vacancy Rate
11.2%

Rental Rate
23.3%

Average Monthly Rental Rate
\$625

POPULATION

2010 Census ¹
38,406

2018 Estimate ²
38,035

2028 Projection ³
38,382

2038 Projection ³
38,408

2018 Population Details ²

Median Age	43.5	Ages 0-17	20%
Female	51%	Ages 18-34	20%
Male	49%	Ages 35-64	40%
Minority	17%	Ages 65+	20%

ECONOMICS ⁴

Median Household Income
\$42,876

Per Capita Income
\$23,566

% Families Below Poverty Level
11.9%

Labor Force Participation
54.3%

Unemployment Rate ⁵
3.4%

Food Insecurity Rate ⁶
13.4%



LAND COVER ¹¹

Percent Forest
48%

Percent Agriculture
40%

Percent Developed
9%



TOURISM

Visitor Spending (Millions) ⁸
\$40.40

Tax Revenues (Millions) ⁸
\$3.15

Existing Trails (Miles) ⁹
8

Parks & Open Space ⁹
1 - Square Mile
288 - Acres

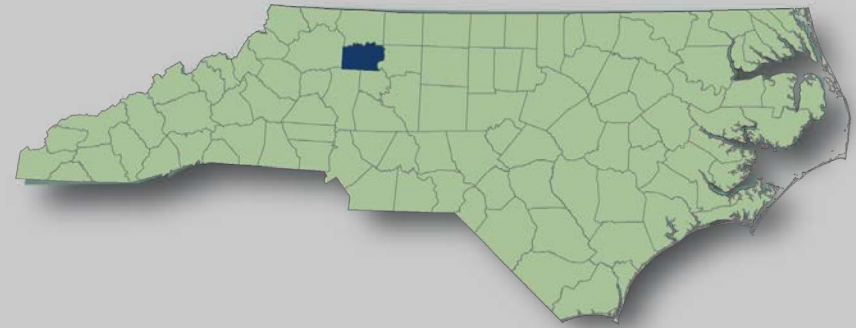


YADKIN COUNTY



AGRICULTURE ¹²

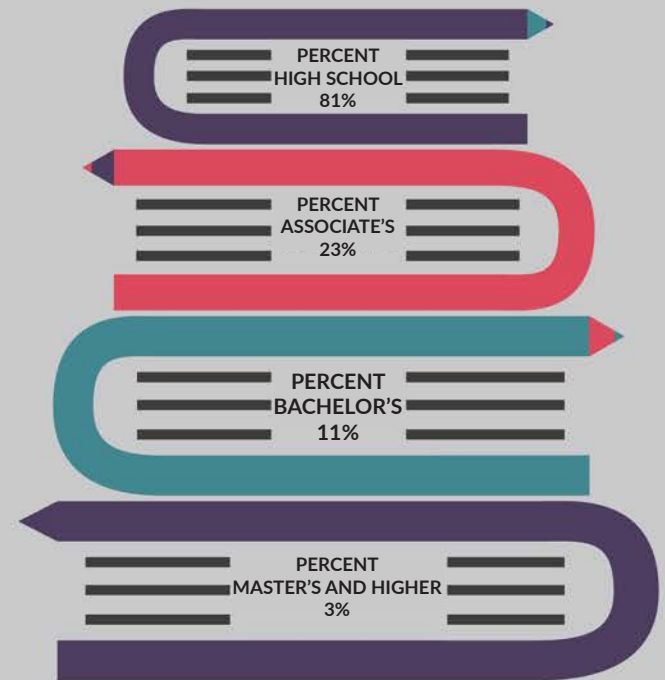
Value of All Crops	\$27,245,000	Number of Farms	818
Value of Animal Products	\$112,406,000	Acres of Farms	87,522
Total Farm Income	\$2,550,000	Direct to Consumer Sales	\$571,000



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	27.8%	\$41,077
Transportation and Warehousing	9.8%	\$48,740
Accommodation and Food Service	8.9%	\$13,784
Retail Trade	8.7%	\$23,488
Construction	6.8%	\$49,968

EDUCATION ⁴



JOBS ¹⁰

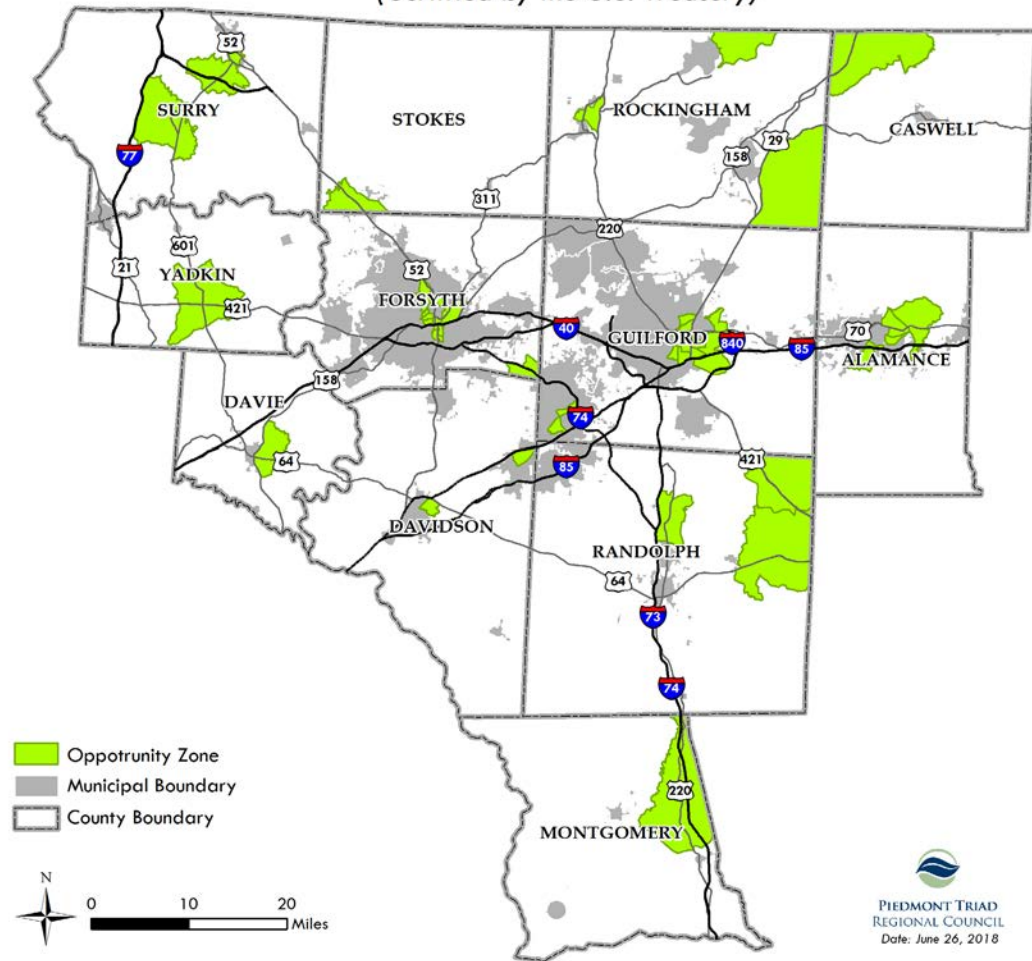
Total Number of Jobs	10,079	Inflow of Workers	5,906
Live and Work in County	4,173	Outflow of Workers	12,525

ADDENDUM A: OPPORTUNITY ZONES

Opportunity Zones are tied to census tracts and were added to the Internal Revenue Code by the 2017 Tax Cuts and Jobs Act. Their goal is to encourage long-term investments in communities through the three core principles of: (1) Deferral, (2) Reduction, and (3) Exclusion.

- There are 43 Qualified Opportunity Zones in the Piedmont Triad region.
- There is at least one Qualified Opportunity Zone in every county.
- Projects must be driven with investments by Opportunity Funds.
- Opportunity Funds must self-certify with the IRS and can be corporations or partnerships.
- Investments can be made through three Stock, Interest, Tangible Property.
- Piedmont Triad stakeholders recognize the importance of equity and transparency in relation to Opportunity Zones.

**Piedmont Triad Regional Council
Opportunity Zones**
(Certified by the U.S. Treasury)



ADDENDUM B: DISASTER RECOVERY

The United States Economic Development Administration (EDA) supports disaster recovery and resiliency efforts at the local level. Through an extensive network of Economic Development Districts (EDDs), coordination efforts are leveraged by getting the funding assistance and support to the local level. In this section, we have prepared a framework for Disaster Recovery and Economic Resilience that provides an approach for becoming better prepared for future disasters, including economic, manmade, and natural recovery from disasters, and then transitioning back to a pre-incident state. The framework is depicted in the following diagram, and each of the phases is further described in the following narrative.



PURPOSE

The purpose of this section is to define Disaster Recovery and Economic Resilience and provide a guide to increase resiliency and sustainability in the region.

STRATEGIC PREPAREDNESS

Too often, the only time we discuss disasters is after the disaster hits a community and affects lives within the community. Vulnerable populations such as the economically depressed, elderly, chronically ill, or disabled are adversely affected and often suffer the greatest from disasters and are less prepared for the disaster. Various shocks have different levels of severity and devastation, including natural disaster; major stock market fluctuations; economic downturns and recessions; government shutdowns; availability of funds for grants; terrorist attacks; and substantial fluctuations in supplies, as examples. Each of these types of shocks should be considered when the following actions are considered and planned for. We collaborate and coordinate with stakeholders within the region to ensure hazard and risk vulnerabilities are considered and planned for, mitigated against if possible, and preparedness plans are in place for a response.

STRATEGIC RESILIENCE, RISK REDUCTION, AND MITIGATION

The following actions will help to develop an enhanced risk reduction and mitigation plan to enhance disaster recovery and create a more resilient community and economy:

- Prepare plans that allow the community to absorb, respond, adapt, and recover to pre-incident conditions.
- Develop a long-term strategy to diversify and expand the regional industrial base.
- Develop personal relationships and a communication strategy for small businesses in the region.
- Focus efforts on strengthening existing businesses, especially high-growth businesses.
- Increase communications between local government, emergency management, utilities, economic development, and the business community.

- Partner with community colleges and the university system to establish nimble workforce development programs that can prepare residents for the future economy and quickly react to shocks and help to retrain residents for the new normal.
- Develop responsive initiatives that define key stakeholders, roles, responsibilities, and actions. In addition, establish a system for regular communication, monitoring, and updating of business community needs and issues.
- Sunny day initiatives diversify the economic base of the region, making the entire region more adaptable and better able to withstand or avoid a devastating incident.
- Support inclusive planning efforts/innovative strategies in disaster preparedness.
- Invest in studies and pilot programs that explore the benefits of disaster preparedness and mitigation.
- Incorporate the entire disaster life cycle in funding efforts, from preparedness through recovery.

REACTIVE RESPONSE AND RELIEF

Since people in every community have basic needs to survive, we must respond quickly after the disaster to help provide these needs. Community members need food, potable water, shelter, and medication. For underserved and poverty-stricken communities, meeting the basic needs is a day to day struggle and can be increasingly compounded by a disaster or event. Response and relief must begin immediately following a disastrous event. Those needing medical attention must be attended to quickly and those not needing medical care may be assisting their neighbors and the community immediately following the event. This short-term response typically comes from the public safety community such as fire, EMS, police, and community emergency response teams. For more long-term

response and relief, you will find Volunteer Organizations Active in Disaster (VOAD) providing services within the impacted communities. Immediate economic response and relief starts with the local government recognizing the extent of the impacts and conducting situational reports for state and federal agencies. Stakeholders working together in a disaster recovery framework can address the economic and social impacts during response and recovery. We work with stakeholders to maintain situational awareness and provide a toolkit for access to partners and agencies that can benefit the response and recovery efforts.

STRATEGIC RECONSTRUCTION AND RECOVERY

Recovery efforts can be categorized into two periods of time; short-term and long-term. While the recovery plans will be uniquely defined based on the type of hazard or incident that occurs, the process and priorities remain the same; conduct a damage assessment, minimizing loss, managing resources, smart and resilient rebuilding, human services, continuity of operations, the reestablishment of utility services, temporary assistance for housing, economic assistance, and public information.

Recovery plans should include the critical infrastructure and vital resources to the community. Restoration of critical utilities may be the only thing needed for communities to begin internal rebuilding and recovery.

Long-term recovery planning includes redevelopment, restoration, and comprehensive plans to restore the economy to a new normal. A new normal is defined as building back with resiliency included so as to reduce similar impacts in the future from similar threats. Following individual and public assistance damage assessments, local governments and involve state and federal agencies to determine the extent of need and financial shock to the com-





munity. Local governments may choose to impose or relax building code ordinances to encourage resilient rebuilding.

The actions contained within redevelopment plans for each county should be prioritized based on community input. Tactics will change with each incident, so there should be in place a system for assessing and prioritizing recovery efforts in order to ensure that the most pressing issues are addressed first. There should be a detailed procurement plan in place that sources local suppliers and providers in the immediate aftermath of an incident, but especially a natural/manmade disaster. Supply routes, highways, and airports could be shut down, so there should be local suppliers identified prior to a disaster occurring. In addition, the procurement of goods and services should be conducted in accordance with standards that allow for FEMA reimbursement; therefore, the procurement team should have a working knowledge and understanding of FEMA procurement standards. There should also be a list of resources prepared and made generally available to the public that outlines who to call for support during times of disaster.

ASSESSMENT AND IMPROVEMENT

A vital component of any action plan is to assess the effectiveness of the plan. Disaster Recovery and Economic Resiliency is an ongoing effort. While incidents occur infrequently and are almost always unexpected, there are ways to assess recovery and resiliency plans in the absence of an actual incident. One way to assess the plan absent an incident is to conduct table-top exercises. The goal would be to have business and industry leaders, county and local leaders, and state emergency management personnel participate in these table-top exercises to assess the strength and weaknesses of the recovery and resiliency plan. Following the exercise, officials should correct the plan where possible

and acknowledge any potential shortcomings. Assessments should occur during and after an incident. What parts of the plan were helpful for this incident? What parts of the plan were not helpful? How can the plan be improved based upon the region's ability to withstand or avoid the incident's shock? With a constructive critical analysis of lessons learned, the plan can be improved after every table-top exercise and every incident.

RETURN TO A NEW NORMAL

Following the immediate recovery period, the regional partners should return to a new normal initiative in order to resume the long-term efforts to diversify, strengthen, and develop a more adaptable economy. Efforts should be prioritized based on the incident but should include local business outreach to update the local business inventory. More than 50% of businesses do not reopen after a disaster. The region's ability to work toward a new normal will be measured by the economy, retained population, and amount of businesses that survive an incident, as well as the ability to adapt to the new normal following an incident with a rebuilt economy.

The regional council's objective in disaster recovery and resiliency is to support and assist its members, stakeholders, and communities in preparing, planning, and recovering from an incident's shock that could have detrimental effects on the sustainability of the population, economy, and community.

The regional council builds collaboration and promotes coordination among local, state, and federal stakeholders to plan for disasters, build continuity plans, develop recovery plans, and take mitigation and sustainment steps to ensure community and economic resiliency.



TRIAD TOMORROW

CREATIVE REGIONAL SOLUTIONS

