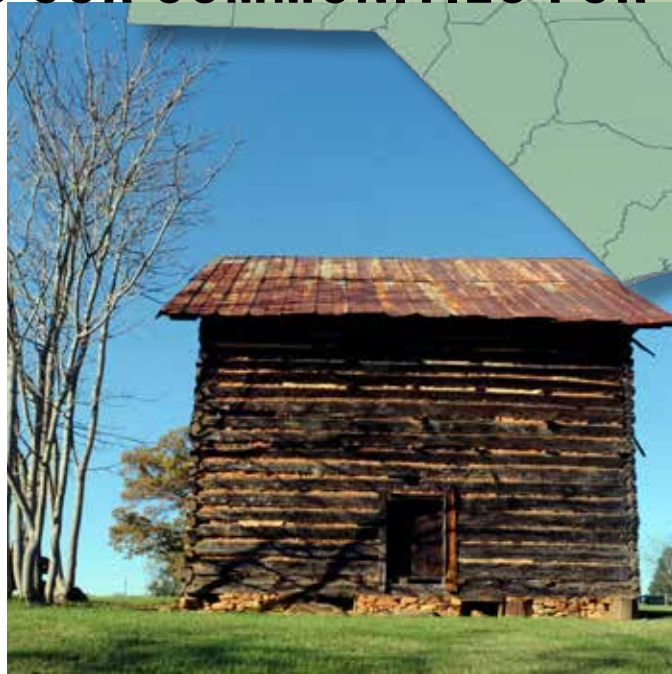


TRIAD TOMORROW

BUILDING OUR COMMUNITIES FOR TOMORROW'S JOBS





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

Joseph Furstenberg, Planner and Economic Development Specialist - Jesse Day, Regional Planning Director
Malinda Ford, GIS Manager - Paul M. Kron, Foothills Design
Michael Blair, Housing Director - Jessica Rambo, Painted Buffalo Designs
Betty Huskins - Ridgetop Associates

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



CONTENTS

04 Executive Summary

08 Introduction

10 Piedmont Triad Region Overview

14 Goal 1: Build on the Region's Competitive Advantage and Leverage the Marketplace

16 Goal 2: Establish and Maintain a Robust Regional Infrastructure

24 Goal 3: Create Vibrant, Healthy, and Resilient Communities

28 Goal 4: Develop Talented and Innovative People

32 Regional and County Fact Sheets



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 strategies 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 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 in order to work for comprehensive and equitable economic outcomes.

Targeting the Region's Growth Clusters

The Piedmont Triad region leads the state in the percentage of employment in the manufacturing sector at 22.6% (EMSI, 2016). The following are the top industry clusters throughout the region:

- A. Manufacturing
- B. Aviation
- C. Logistics/Distribution
- D. Hospitality/Tourism
- E. Healthcare
- F. Agriculture
- G. Bio/Nano Sciences



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 challenges 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 mis-perception 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.

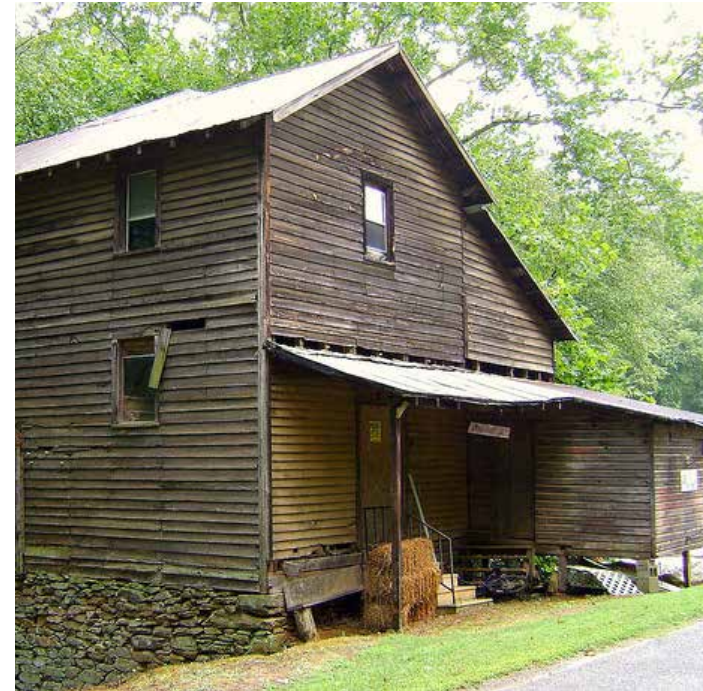
The Piedmont Triad Regional Council (PTRC) is a designated Economic Development District (EDD) through the US Economic Development Administration (EDA). As the region's EDD, the regional council is responsible for developing a Comprehensive Economic Development Strategy (CEDS) to identify regional priorities 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 a more resilient economy 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 51% forest cover, 23% agriculture or pasture, and 15% developed land. (NLCD, 2017).

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 8 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, 9 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 2016, 68 percent of North Carolina's visitors traveled to North Carolina's Piedmont Region, approximately 32.8 million person-trips (NC Commerce, 2016). On average overnight visitors to the region spent 3.6 nights and the average household trip expenditure for overnight visitors was \$525 (NC Commerce, 2016). 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 underemployment
- 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 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 and rivers. 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 utilized in a re purposed 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 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 sites and catalog with an easily accessed map.
 - 1.2 Ensure that proper zoning, special use permits, watershed regulations, 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 and Historic Preservation Tax Credits 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) 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
- Increase 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, a great place to own a business and to have a more desirable, productive and efficient workforce that is cheaper 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 millennial’s 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 millennial’s want to be home owners, according to Trulia, 93% of millennial’s 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 afford-ability and access for all walks of life.

STRATEGIES AND TACTICS:

- 1 Expand and diversify the affordable housing stock in areas near employment centers 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
- Utilize 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 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 performing assessments of market supply/demand and other opportunities.**
 - 1.1 Identify sources of agricultural products for which there is household and restaurant demand
 - 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.



STRATEGIES AND TACTICS:

- 2. Establish food policy councils in each county to assess the marketplace for growth opportunities in markets, 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 cooperation among councils to maximize impact
 - 2.3 Support best practices for the creation of local farmers markets to expand the local economy.

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

Metrics:

- Consumption of local food
- Increase business ties between regional farmers, farmers markets and local food restaurants or value added food business
- Leveraging of resources to support value-added food production

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.
 - 1.4 Utilize 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

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



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 many 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

PIEDMONT TRIAD REGION



HOUSING ⁴

Median Home Value
\$140,117

Occupied Housing Units
659,362

Vacancy Rate
11.5%

Rental Rate
34.2%

Average Monthly Rental Rate
\$715

POPULATION ^{1, 2, 3}

2010 Census
1,640,717

2015 Estimate
1,692,247

2025 Projection
1,797,247

2025 Projection
1,797,247

2015 Population Details:

% Female	52%	Median Age	39.8
% Male	48%	Ages 18-34	378,899
% Minority	36%	Ages 35-64	667,591
		Ages 65+	267,118

ECONOMICS ^{4, 5, 6}

Median Household Income
\$43,376

Per Capita Income
\$24,510

% Families Below Poverty Level
13.5%

Labor Force Participation
61.7%

Unemployment Rate
4.6%

Food Insecurity Rate
16.1%



LAND COVER ¹¹

Percent Forest
51%

Percent Agriculture
23%

Percent Developed
15%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$3,001.35

Tax Revenues (Millions)
\$233.96

Existing Trails (Miles)
535

Parks & Open Space
264 - Miles
169,000 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

Revenue from Agritourism
 \$2,474,000
 Direct to Consumer Sales
 \$4,589,000

Acres of Farms
 1,081,709
 Value of Animal Products
 \$705,366,000
 Number of Farms
 10,373



LARGEST INDUSTRIES ⁷

Piedmont Triad Top Employers

Wake Forest Baptist Medical Center

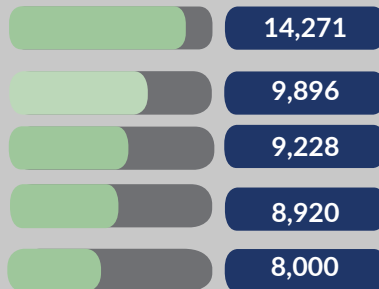
Novant Health

Guilford County Schools

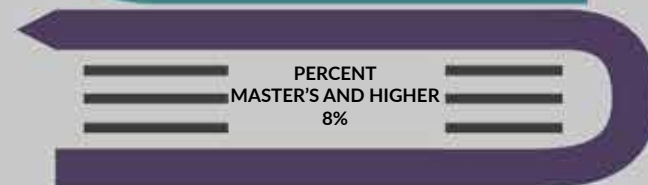
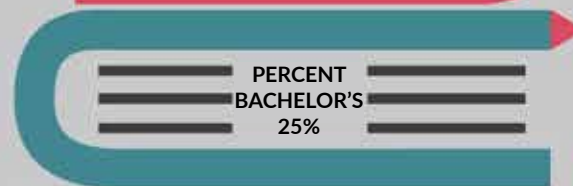
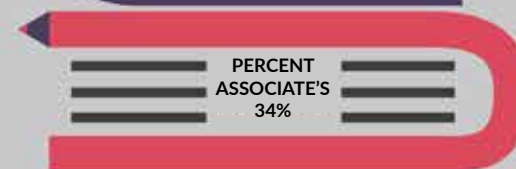
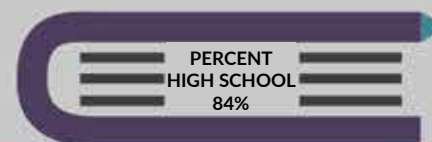
Cone Health

Winston-Salem/Forsyth County Schools

Triad Employees



EDUCATION ⁴



⁵ JOBS

Total Number of Jobs
 790,435

Inflow of Workers
 163,023

Live and Work in Region
 533,932

Outflow of Workers
 170,848



ALAMANCE COUNTY

HOUSING ⁴

Median Home Value
\$138,100

Occupied Housing Units
61,545

Vacancy Rate
9.2%

Rental Rate
34.6%

Average Monthly Rental Rate
\$745

POPULATION ^{1, 2, 3}

2010 Census
151,131

2015 Estimate
157,522

2025 Projection
177,741

2025 Projection
198,573

2015 Population Details:

% Female	53%	Median Age	39.4
% Male	47%	Ages 18-34	35,422
% Minority	35%	Ages 35-64	61,049
		Ages 65+	25,521

ECONOMICS ^{4, 5, 6}

Median Household Income
\$41,814

Per Capita Income
\$23,434

% Families Below Poverty Level
14.4%

Labor Force Participation
62.5%

Unemployment Rate
4.4%

Food Insecurity Rate
15.4%



LAND COVER ¹¹

Percent Forest
42%

Percent Agriculture
30%

Percent Developed
18%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$179.84

Tax Revenues (Millions)
\$13.79

Existing Trails (Miles)
51

Parks & Open Space
6 - Miles
3,790 - Acres



1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NCOneMap Managed Lands
11. NLCD 2011
12. USDA Census



¹² AGRICULTURE

Revenue from Agritourism
\$16,000

Direct to Consumer Sales
\$531,000

Acres of Farms
83,551

Value of Animal Products
\$17,525,000

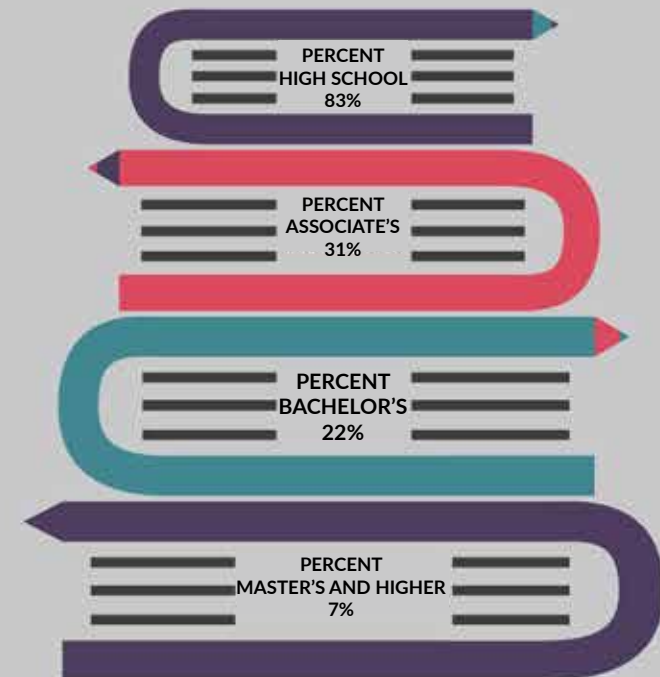
Number of Farms
732



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	16.5%	\$53,505
Manufacturing	15.6%	\$46,328
Retail and Trade	14.8%	\$24,385
Accommodations and Food Service	11.4%	\$14,766
Administration and Support	6.4%	\$23,421

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs 61,103	Inflow of Workers 30,215
Live and Work in County 30,888	Outflow of Workers 36,139



CASWELL COUNTY



HOUSING ⁴

Median Home Value
\$98,400

Occupied Housing Units
8,676

Vacancy Rate
18.0%

Rental Rate
22.1%

Average Monthly Rental Rate
\$571

POPULATION ^{1, 2, 3}

2010 Census
23,719

2015 Estimate
23,606

2025 Projection
23,613

2025 Projection
23,612

2015 Population Details:

% Female	49%	Median Age	44.4
% Male	51%	Ages 18-34	4,823
% Minority	39%	Ages 35-64	9,961
		Ages 65+	4,450

ECONOMICS ^{4, 5, 6}

Median Household Income
\$37,869

Per Capita Income
\$19,698

% Families Below Poverty Level
14.2%

Labor Force Participation
54.1%

Unemployment Rate
4.9%

Food Insecurity Rate
18.5%



LAND COVER ¹¹

Percent Forest
58%

Percent Agriculture
21%

Percent Developed
4%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$8.91

Tax Revenues (Millions)
\$1.06

Existing Trails (Miles)
1

Parks & Open Space
32 - Miles
20,456 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

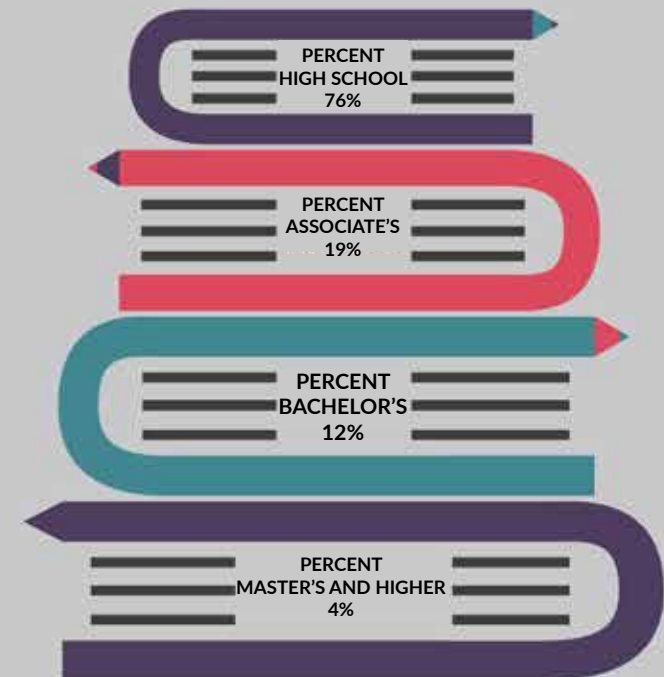
Revenue from Agritourism	\$77,000	Acres of Farms	97,060
Direct to Consumer Sales	\$405,000	Value of Animal Products	\$16,546,000
		Number of Farms	543



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Educational Services	16.1%	\$32,414
Retail and Trade	9.7%	\$19,071
Manufacturing	7.2%	\$49,570
Construction	6.7%	\$36,765
Administration and Support	3.8%	\$30,727

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	2,766	Inflow of Workers	1,642
Live and Work in County	1,124	Outflow of Workers	8,573

DAVIDSON COUNTY



HOUSING ⁴

Median Home Value
\$132,200

Occupied Housing Units
64,299

Vacancy Rate
11.8%

Rental Rate
28.1%

Average Monthly Rental Rate
\$655

POPULATION ^{1, 2, 3}

2010 Census
162,878

2015 Estimate
165,193

2025 Projection
173,068

2025 Projection
180,969

2015 Population Details:

% Female Median Age
51% 41.9

% Male Ages 18-34
49% 32,492

% Minority Ages 35-64
20% 68,376

Ages 65+
27,565

ECONOMICS ^{4, 5, 6}

Median Household Income
\$43,363

Per Capita Income
\$23,060

% Families Below Poverty Level
12.1%

Labor Force Participation
61.6%

Unemployment Rate
4.3%

Food Insecurity Rate
13.9%



LAND COVER ¹¹

Percent Forest
49%

Percent Agriculture
23%

Percent Developed
15%



TOURISM ^{8,9,10}

Visitor Spending (Millions)
\$159.59

Tax Revenues (Millions)
\$14.21

Existing Trails (Miles)
3

Parks & Open Space
7 - Miles
4,535 - Acres



1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NCOneMap Managed Lands
11. NLCD 2011
12. USDA Census



Revenue from Agritourism
\$755,000

Direct to Consumer Sales
\$287,000

¹² **AGRICULTURE**

Acres of Farms
87,310

Value of Animal Products
\$31,854,000

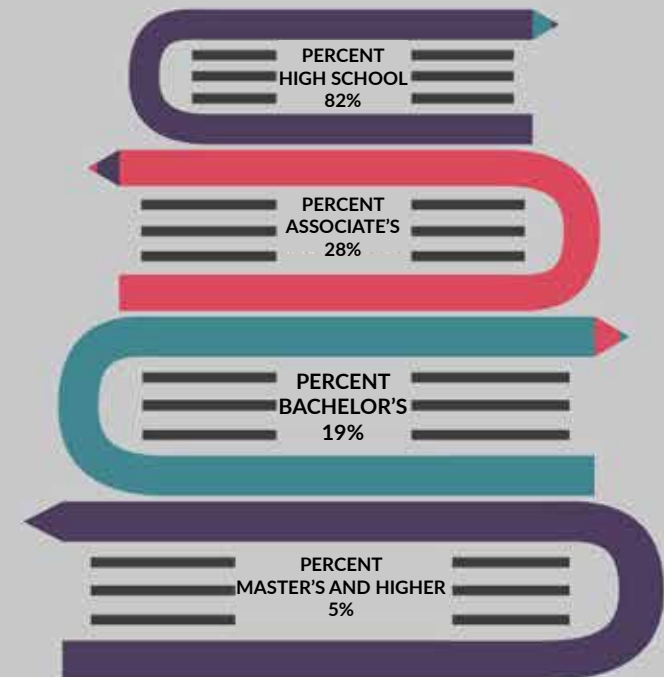
Number of Farms
1,062



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	22.8%	\$45,295
Retail and Trade	11.6%	\$25,082
Health Care and Social Services	9.5%	\$35,074
Accommodations and Food Service	8.5%	\$14,098
Administration and Support	7.3%	\$24,776

EDUCATION ⁴



⁵ **JOBS**

Total Number of Jobs
44,157

Inflow of Workers
21,434

Live and Work in County
22,723

Outflow of Workers
49,077

DAVIE COUNTY



HOUSING ⁴

Median Home Value
\$169,300

Occupied Housing Units
15,813

Vacancy Rate
13.1%

Rental Rate
20.7%

Average Monthly Rental Rate
\$674

POPULATION ^{1,2,3}

2010 Census
41,240

2015 Estimate
41,743

2025 Projection
44,208

2025 Projection
46,674

2015 Population Details:

% Female	51%	Median Age	44.0
% Male	49%	Ages 18-34	7,781
% Minority	15%	Ages 35-64	17,268
		Ages 65+	7,926

ECONOMICS ^{4,5,6}

Median Household Income
\$51,527

Per Capita Income
\$28,141

% Families Below Poverty Level
8.2%

Labor Force Participation
61.7%

Unemployment Rate
4.0%

Food Insecurity Rate
11.7%



LAND COVER ¹¹

Percent Forest
47%

Percent Agriculture
33%

Percent Developed
10%



TOURISM ^{8,9,10}

Visitor Spending (Millions)
\$36.48

Tax Revenues (Millions)
\$2.71

Existing Trails (Miles)
0

Parks & Open Space
6 - Miles
3,990 - Acres



1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NCOneMap Managed Lands
11. NLCD 2011
12. USDA Census



¹² AGRICULTURE

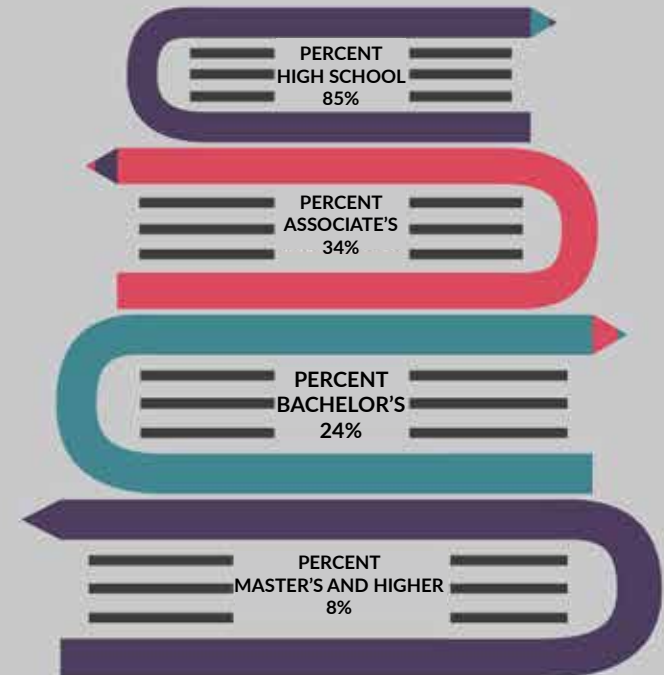
Revenue from Agritourism	\$109,000	Acres of Farms	59,618
Direct to Consumer Sales	\$106,000	Value of Animal Products	\$12,748,000
		Number of Farms	640



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	24.5%	\$41,422
Retail and Trade	11.6%	\$25,697
Health Care and Social Services	9.8%	\$36,948
Administration and Support	9.7%	\$23,265
Accommodation and Food Service	8.9%	\$13,136

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	10,958	Inflow of Workers	6,638
Live and Work in County	4,320	Outflow of Workers	13,561

FORSYTH COUNTY

HOUSING ⁴

Median Home Value
\$151,100

Occupied Housing Units
143,207

Vacancy Rate
10.4%

Rental Rate
37.9%

Average Monthly Rental Rate
\$732

POPULATION ^{1, 2, 3}

2010 Census
350,670

2015 Estimate
366,543

2025 Projection
404,725

2025 Projection
445,765

2015 Population Details:

% Female	53%	Median Age	37.6
% Male	47%	Ages 18-34	84,721
% Minority	45%	Ages 35-64	141,490
		Ages 65+	53,754

ECONOMICS ^{4, 5, 6}

Median Household Income
\$45,471

Per Capita Income
\$26,674

% Families Below Poverty Level
14.0%

Labor Force Participation
63.2%

Unemployment Rate
4.4%

Food Insecurity Rate
16.6%



LAND COVER ¹¹

Percent Forest
39%

Percent Agriculture
14%

Percent Developed
39%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$846.21

Tax Revenues (Millions)
\$65.98

Existing Trails (Miles)
31

Parks & Open Space
10- Miles
6,505 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

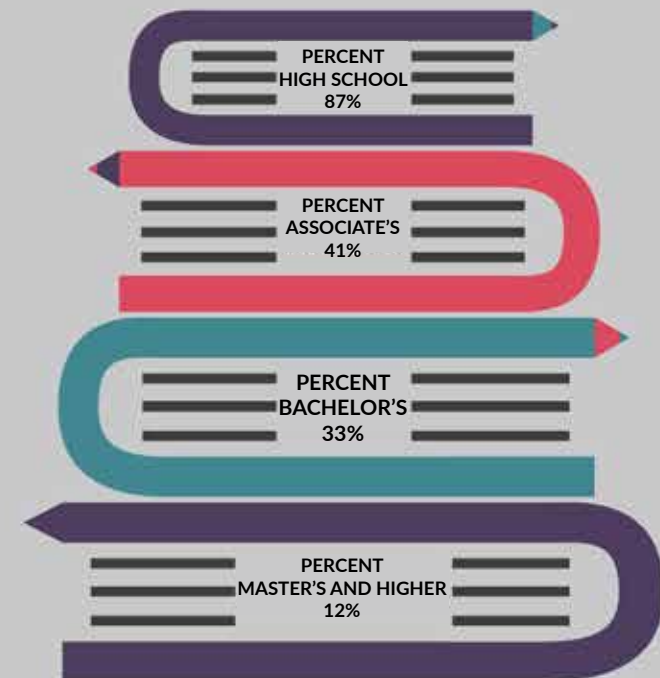
Revenue from Agritourism	\$1,175,000	Acres of Farms	40,467
Direct to Consumer Sales	\$536,000	Value of Animal Products	\$1,726,000
		Number of Farms	662



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	18.8%	\$50,863
Retail and Trade	11.5%	\$27,692
Accommodation and Food Service	9.4%	\$16,799
Educational Services	9.0%	\$59,131
Manufacturing	8.8%	\$64,785

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	179,382	Inflow of Workers	93,299
Live and Work in County	86,083	Outflow of Workers	63,530



GUILFORD COUNTY



HOUSING ⁴

Median Home Value
\$140,117

Occupied Housing Units
659,362

Vacancy Rate
11.5%

Rental Rate
34.2%

Average Monthly Rental Rate
\$715

POPULATION ^{1, 2, 3}

2010 Census
488,406

2015 Estimate
517,124

2025 Projection
533,524

2025 Projection
579,125

2015 Population Details:

% Female	53%	Median Age	36.8
% Male	47%	Ages 18-34	130,566
% Minority	49%	Ages 35-64	197,917
		Ages 65+	72,892

ECONOMICS ^{4, 5, 6}

Median Household Income
\$45,651

Per Capita Income
\$26,762

% Families Below Poverty Level
13.0%

Labor Force Participation
64.1%

Unemployment Rate
4.8%

Food Insecurity Rate
18.5%



LAND COVER ¹¹

Percent Forest
36%

Percent Agriculture
23%

Percent Developed
34%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$1,348.10

Tax Revenues (Millions)
\$100.98

Existing Trails (Miles)
167

Parks & Open Space
34 - Miles
21,418 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

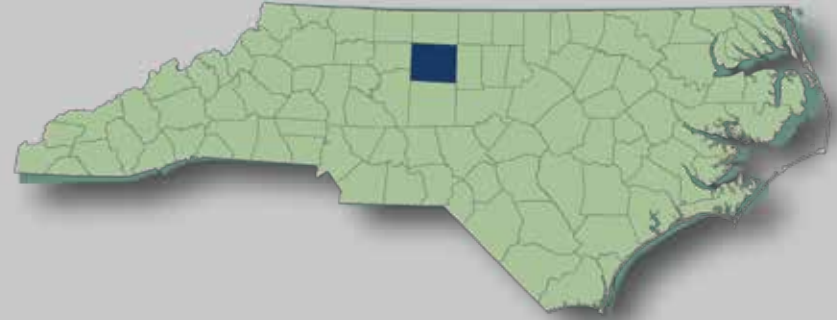
Revenue from Agritourism
\$25,497,000

Direct to Consumer Sales
\$521,000

Acres of Farms
90,750

Value of Animal Products
\$25,497,000

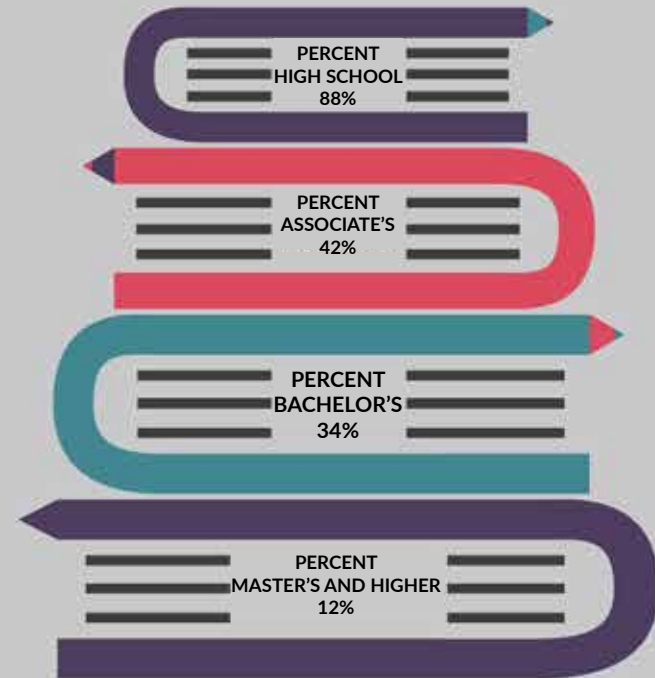
Number of Farms
962



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Health Care and Social Services	13.2%	\$46,727
Manufacturing	12.3%	\$62,147
Retail and Trade	10.8%	\$29,185
Administration and Support	9.5%	\$28,283
Accommodation and Food Service	9.0%	\$16,530

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs
179,382

Inflow of Workers
93,299

Live and Work in County
86,083

Outflow of Workers
63,530

MONTGOMERY COUNTY



HOUSING ⁴

Median Home Value
\$90,900

Occupied Housing Units
10,588

Vacancy Rate
33.8%

Rental Rate
29.7%

Average Monthly Rental Rate
\$550

POPULATION ^{1, 2, 3}

2010 Census
27,798

2015 Estimate
27,826

2025 Projection
28,496

2025 Projection
29,168

2015 Population Details:

% Female	53%	Median Age	41.5
% Male	47%	Ages 18-34	5,567
% Minority	37%	Ages 35-64	10,650
		Ages 65+	5,302

ECONOMICS ^{4, 5, 6}

Median Household Income
\$32,500

Per Capita Income
\$19,331

% Families Below Poverty Level
18.6%

Labor Force Participation
53.1%

Unemployment Rate
4.8%

Food Insecurity Rate
15.9%



LAND COVER ¹¹

Percent Forest
69%

Percent Agriculture
8%

Percent Developed
6%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$29.26

Tax Revenues (Millions)
\$4.38

Existing Trails (Miles)
115

Parks & Open Space
74 - Miles
47,401 - Acres



1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NOneMap Managed Lands
11. NLCD 2011
12. USDA Census



¹² AGRICULTURE

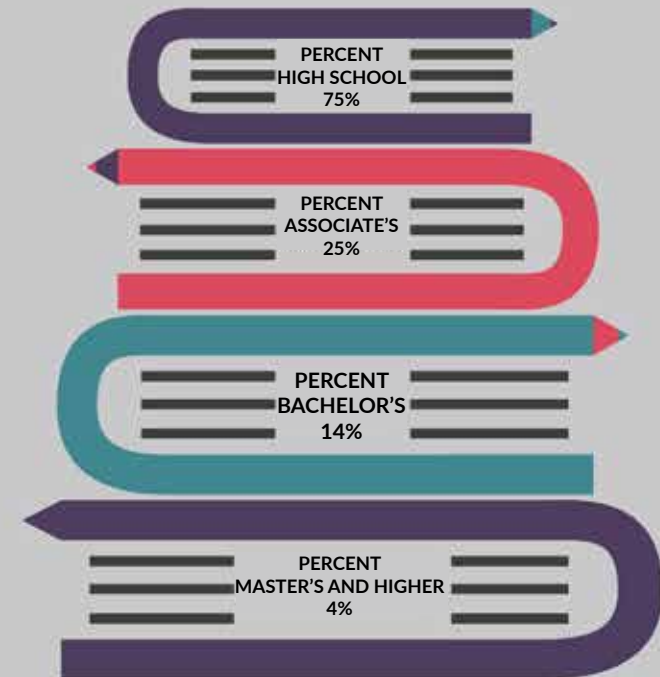
Revenue from Agritourism	\$14,000	Acres of Farms	35,047
Direct to Consumer Sales	\$664,000	Value of Animal Products	\$113,005,000
		Number of Farms	250



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	33.9%	\$37,700
Retail and Trade	8.6%	\$26,126
Accommodation and Food Service	5.3%	\$13,375
Construction	4.4%	\$41,997
Administration and Support	4.4%	\$27,841

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	8,673	Inflow of Workers	5,013
Live and Work in County	3,660	Outflow of Workers	6,665



RANDOLPH COUNTY

HOUSING ⁴

Median Home Value
\$120,700

Occupied Housing Units
54,507

Vacancy Rate
11.0%

Rental Rate
27.3%

Average Monthly Rental Rate
\$638

POPULATION ^{1, 2, 3}

2010 Census
141,752

2015 Estimate
142,943

2025 Projection
144,423

2025 Projection
145,902

2015 Population Details:

% Female	51%	Median Age	40.8
% Male	49%	Ages 18-34	28,934
% Minority	21%	Ages 35-64	57,940
		Ages 65+	23,314

ECONOMICS ^{4, 5, 6}

Median Household Income
\$41,947

Per Capita Income
\$21,175

% Families Below Poverty Level
13.6%

Labor Force Participation
61.8%

Unemployment Rate
4.4%

Food Insecurity Rate
13.1%



LAND COVER ¹¹

Percent Forest
52%

Percent Agriculture
25%

Percent Developed
11%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$138.90

Tax Revenues (Millions)
\$10.77

Existing Trails (Miles)
27

Parks & Open Space
38- Miles
24,093- Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

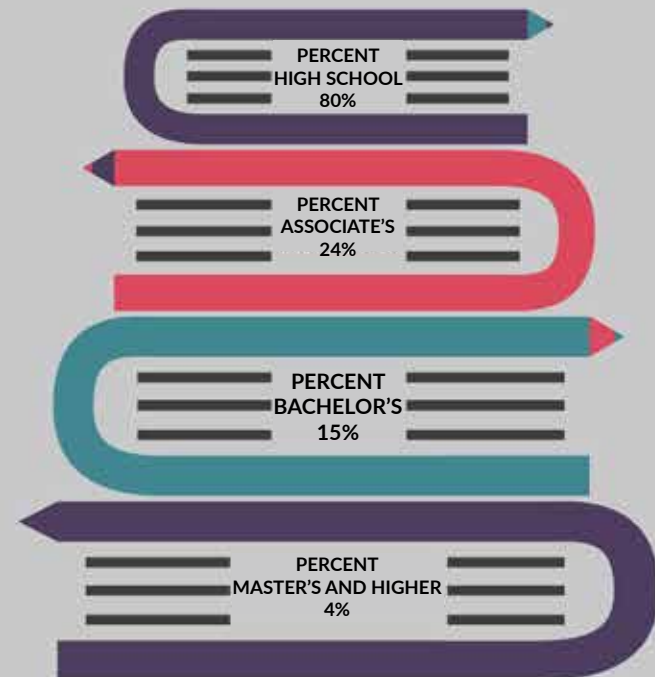
Revenue from Agritourism	Acres of Farms
\$126,000	156,813
Direct to Consumer Sales	Value of Animal Products
\$382,000	\$212,405,000
	Number of Farms
	1,486



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	34.4%	\$38,986
Health Care and Social Services	9.9%	\$35,740
Retail and Trade	9.3%	\$24,499
Accommodations and Food Service	7.7%	\$13,681
Educational Services	7.1%	\$36,685

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	Inflow of Workers
44,626	21,450
Live and Work in County	Outflow of Workers
23,176	36,168

ROCKINGHAM COUNTY



HOUSING ⁴

Median Home Value
\$106,700

Occupied Housing Units
37,583

Vacancy Rate
13.8%

Rental Rate
31.2%

Average Monthly Rental Rate
\$611

POPULATION ^{1, 2, 3}

2010 Census
93,643

2015 Estimate
92,084

2025 Projection
91,636

2025 Projection
91,619

2015 Population Details:

% Female	52%	Median Age	43.8
% Male	48%	Ages 18-34	17,405
% Minority	28%	Ages 35-64	38,434
		Ages 65+	17,062

ECONOMICS ^{4, 5, 6}

Median Household Income
\$38,126

Per Capita Income
\$20,726

% Families Below Poverty Level
14.6%

Labor Force Participation
57.1%

Unemployment Rate
5.2%

Food Insecurity Rate
16.8%



LAND COVER ¹¹

Percent Forest
54%

Percent Agriculture
23%

Percent Developed
11%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$70.85

Tax Revenues (Millions)
\$5.50

Existing Trails (Miles)
16

Parks & Open Space
8 - Miles
5,277 - Acres

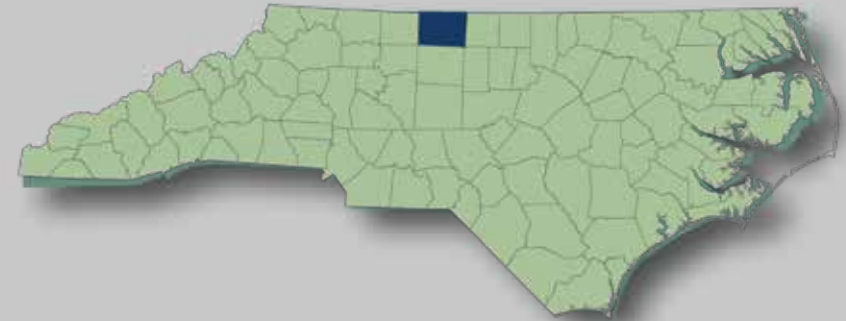


1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NCOneMap Managed Lands
11. NLCD 2011
12. USDA Census



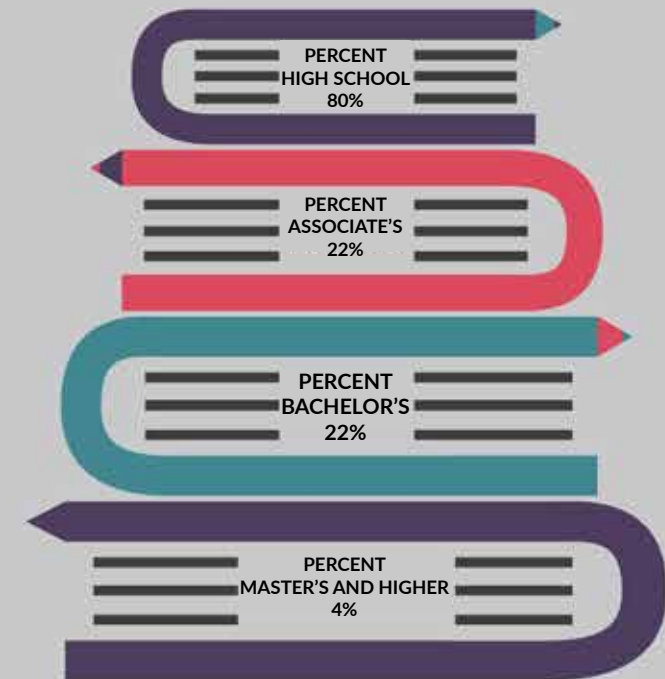
		¹² AGRICULTURE	
Revenue from Agritourism	138,000	Acres of Farms	112,166
Direct to Consumer Sales	\$355,000	Value of Animal Products	\$8,437,000
		Number of Farms	902



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	22.4%	\$46,113
Retail and Trade	14.7%	\$23,796
Health Care and Social Services	11.9%	\$35,695
Accommodations and Food Service	8.6%	\$13,695
Educational Services	7.0%	\$36,997

EDUCATION ⁴



		⁵ JOBS	
Total Number of Jobs	25,610	Inflow of Workers	12,034
Live and Work in County	13,576	Outflow of Workers	25,185

STOKES COUNTY

HOUSING ⁴

Median Home Value
\$117,400

Occupied Housing Units
18,968

Vacancy Rate
13.1%

Rental Rate
22.5%

Average Monthly Rental Rate
\$614

POPULATION ^{1, 2, 3}

2010 Census
47,401

2015 Estimate
46,763

2025 Projection
46,571

2025 Projection
46,505

2015 Population Details:

% Female	51%	Median Age	44.6
% Male	49%	Ages 18-34	9,078
% Minority	9%	Ages 35-64	19,909
		Ages 65+	8,741

ECONOMICS ^{4, 5, 6}

Median Household Income
\$40,696

Per Capita Income
\$20,950

% Families Below Poverty Level
14.1%

Labor Force Participation
67.6%

Unemployment Rate
4.3%

Food Insecurity Rate
13.7%



LAND COVER ¹¹

Percent Forest
63%

Percent Agriculture
18%

Percent Developed
7%



TOURISM ^{8,9,10}

Visitor Spending (Millions)
\$24.17

Tax Revenues (Millions)
\$2.20

Existing Trails (Miles)
65

Parks & Open Space
22 - Miles
13,806 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² **AGRICULTURE**

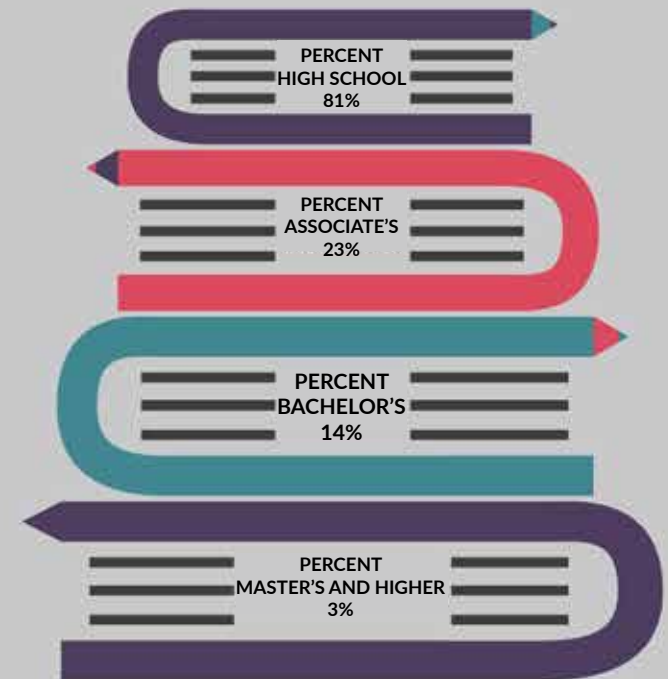
Revenue from Agritourism	\$10,000	Acres of Farms	91,547
Direct to Consumer Sales	\$239,000	Value of Animal Products	\$19,996,000
		Number of Farms	926



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Educational Services	14.3%	\$35,100
Healthcare and Social Services	14.3	\$32,562
Retail and Trade	12.6%	\$21,927
Manufacturing	12.5%	\$40,914
Accommodation and Food Service	10.1%	\$13,255

EDUCATION ⁴



⁵ **JOBS**

Total Number of Jobs	6,821	Inflow of Workers	4,092
Live and Work in County	2,729	Outflow of Workers	17,424

SURRY COUNTY

HOUSING ⁴

Median Home Value
\$115,500

Occupied Housing Units
29,267

Vacancy Rate
12.8%

Rental Rate
27.9%

Average Monthly Rental Rate
\$606

POPULATION ^{1, 2, 3}

2010 Census
73,673

2015 Estimate
73,195

2025 Projection
73,198

2025 Projection
73,195

2015 Population Details:

% Female	51%	Median Age	42.5
% Male	49%	Ages 18-34	14,421
% Minority	17%	Ages 35-64	29,312
		Ages 65+	13,629

ECONOMICS ^{4, 5, 6}

Median Household Income
\$36,164

Per Capita Income
\$20,330

% Families Below Poverty Level
14.7%

Labor Force Participation
55.0%

Unemployment Rate
4.3%

Food Insecurity Rate
13.6%



LAND COVER ¹¹

Percent Forest
55%

Percent Agriculture
26%

Percent Developed
11%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$121.14

Tax Revenues (Millions)
\$9.40

Existing Trails (Miles)
57

Parks & Open Space
24 - Miles
15,384 - Acres



1. US Census Bureau, 2010 Census
2. NC Office of Budget and Management 2015 Certified Population Estimates
3. NC Office of Budget and Management County Population Projections 2016
4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
8. Economic Impact Studies, Visit North Carolina, 2016
9. PTRC GIS Analysis from Regional Trails Database
10. PTRC GIS Analysis from NCOneMap Managed Lands
11. NLCD 2011
12. USDA Census



¹² AGRICULTURE

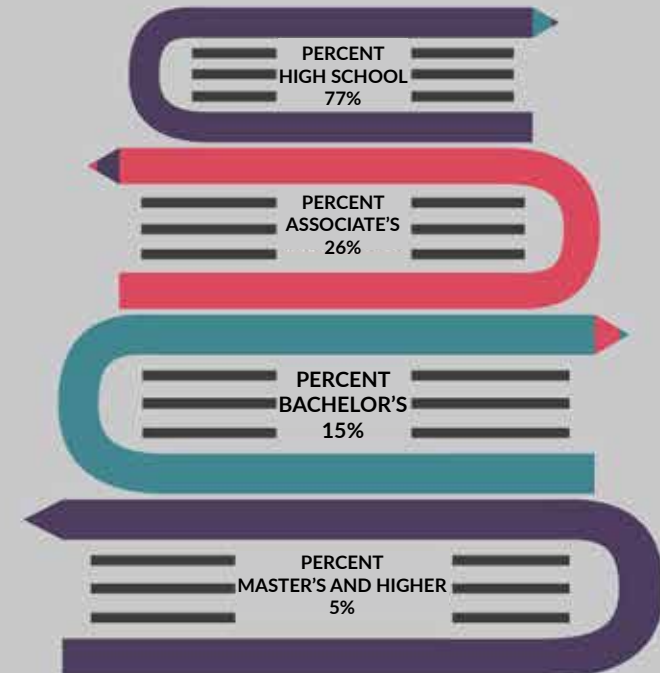
Revenue from Agritourism	\$243,000	Acres of Farms	126,897
Direct to Consumer Sales	\$563,000	Value of Animal Products	\$153,369,000
		Number of Farms	1256



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Retail and Trade	15.2%	\$24,371
Manufacturing	13.7%	\$34,637
Accommodation and Food Service	9.8%	\$13,583
Construction	9.8%	\$48,125
Administration and Support	6.2%	\$21,390

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	27,707	Inflow of Workers	14,274
Live and Work in County	13,433	Outflow of Workers	16,067

YADKIN COUNTY



HOUSING ⁴

Median Home Value
\$124,400

Occupied Housing Units
15,369

Vacancy Rate
10.9%

Rental Rate
24.0%

Average Monthly Rental Rate
\$591

POPULATION ^{1, 2, 3}

2010 Census
38,406

2015 Estimate
37,705

2025 Projection
36,620

2025 Projection
36,231

2015 Population Details:

% Female	51%	Median Age	43.0
% Male	49%	Ages 18-34	7,364
% Minority	16%	Ages 35-64	15,285
		Ages 65+	6,962

ECONOMICS ^{4, 5, 6}

Median Household Income
\$37,796

Per Capita Income
\$21,372

% Families Below Poverty Level
15.3%

Labor Force Participation
56.0%

Unemployment Rate
4.0%

Food Insecurity Rate
12.9%



LAND COVER ¹¹

Percent Forest
43%

Percent Agriculture
38%

Percent Developed
9%



TOURISM ^{8, 9, 10}

Visitor Spending (Millions)
\$37.90

Tax Revenues (Millions)
\$2.98

Existing Trails (Miles)
1

Parks & Open Space
4 - Miles
2,281 - Acres



1. US Census Bureau, 2010 Census
 2. NC Office of Budget and Management 2015 Certified Population Estimates
 3. NC Office of Budget and Management County Population Projections 2016
 4. US Census Bureau, American Community Survey, 5 year Data (2011-2015)
 5. NC Commerce, Labor & Economic Analysis Division, Local Area Unemployment Statistics 2017

6. Feeding America, 2015 Overall Food Insecurity
 7. US Census Bureau, LEHD Origin-Destination Employment Statistics 2014
 8. Economic Impact Studies, Visit North Carolina, 2016
 9. PTRC GIS Analysis from Regional Trails Database
 10. PTRC GIS Analysis from NCOneMap Managed Lands
 11. NLCD 2011
 12. USDA Census



¹² AGRICULTURE

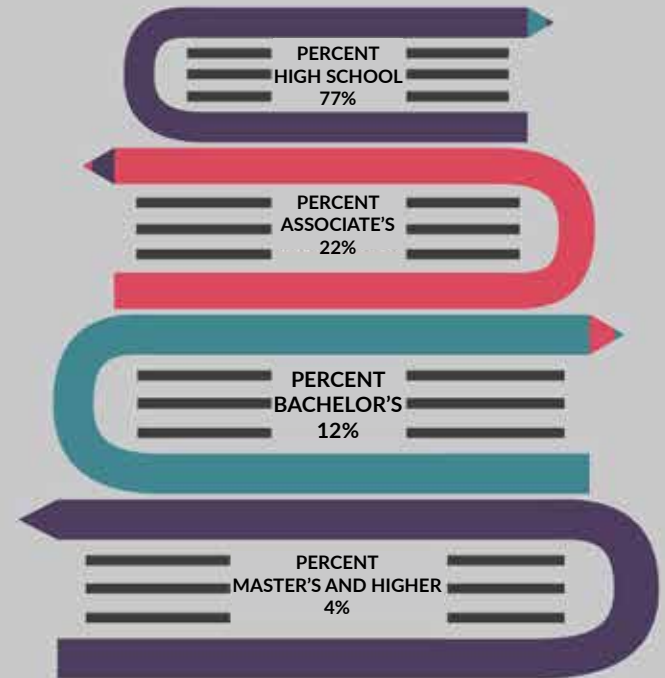
Revenue from Agritourism	Acres of Farms
\$451,000	100,483
Direct to Consumer Sales	Value of Animal Products
\$158,000	\$91,259,000
	Number of Farms
	952



LARGEST INDUSTRIES ⁷

Industry	% of Economy	Avg. Wage
Manufacturing	27.4%	\$37,990
Transportation and Warehousing	10.8%	\$36,381
Accommodation and Food Service	9.3%	\$13,014
Educational Services	8.7%	\$35,072
Retail and Trade	8.5%	\$21,335

EDUCATION ⁴



⁵ JOBS

Total Number of Jobs	Inflow of Workers
9,830	5,745
Live and Work in County	Outflow of Workers
4,085	12,183



TRIAD TOMORROW
CREATIVE REGIONAL SOLUTIONS

The logo features a stylized wave icon on the left, composed of three curved shapes in shades of blue and green. To the right of the icon, the text "TRIAD TOMORROW" is written in a large, bold, black sans-serif font. Below this, the phrase "CREATIVE REGIONAL SOLUTIONS" is written in a smaller, all-caps, black sans-serif font. The entire logo is set against a light blue background that resembles a map of North Carolina.