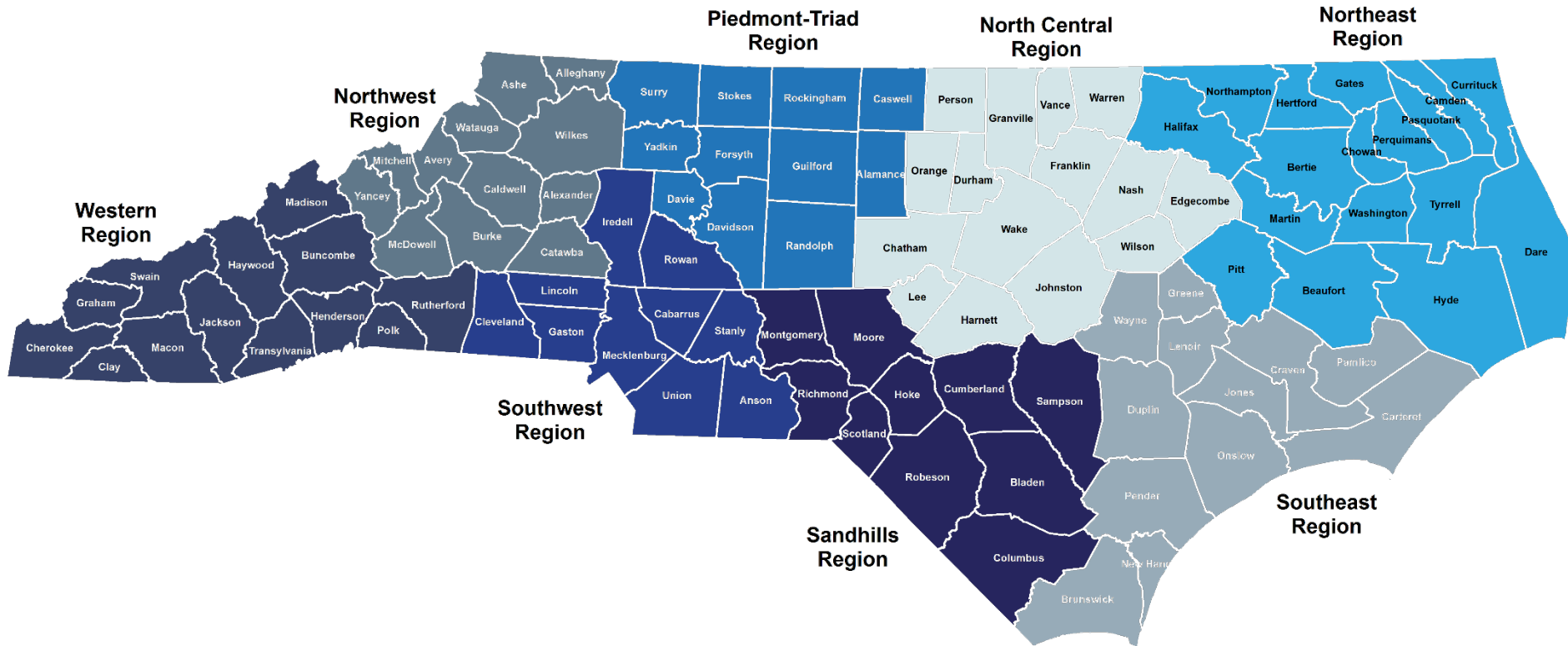


2018 Prosperity Zone Data Books

June 2018

North Carolina (Statewide)

North Carolina Prosperity Zones

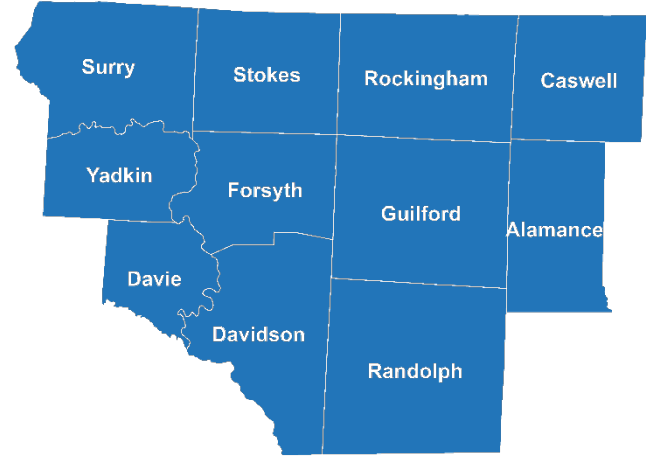


Western North Carolina Prosperity Zones

Northwest Region



Piedmont-Triad Region



Western Region



Southwest Region

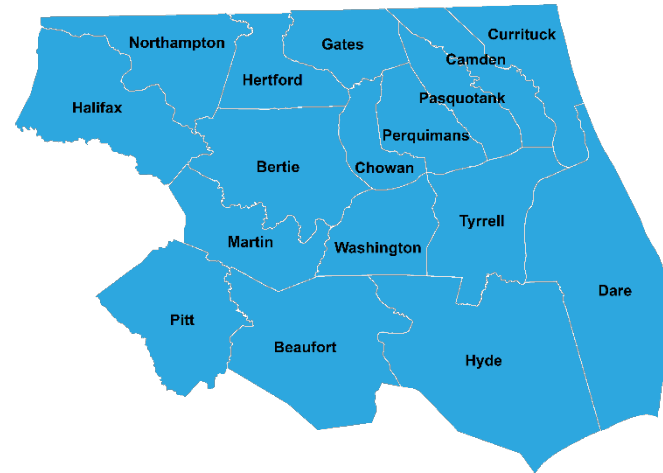


Eastern North Carolina Prosperity Zones

North Central Region



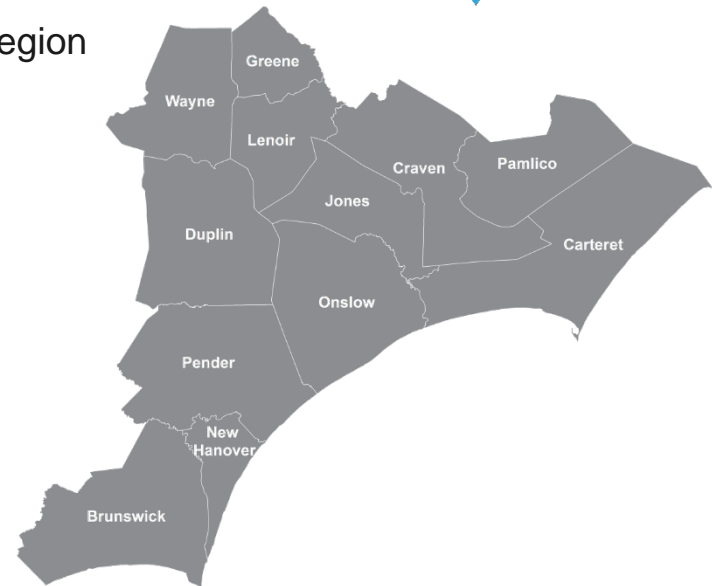
Northeast Region



Sandhills Region

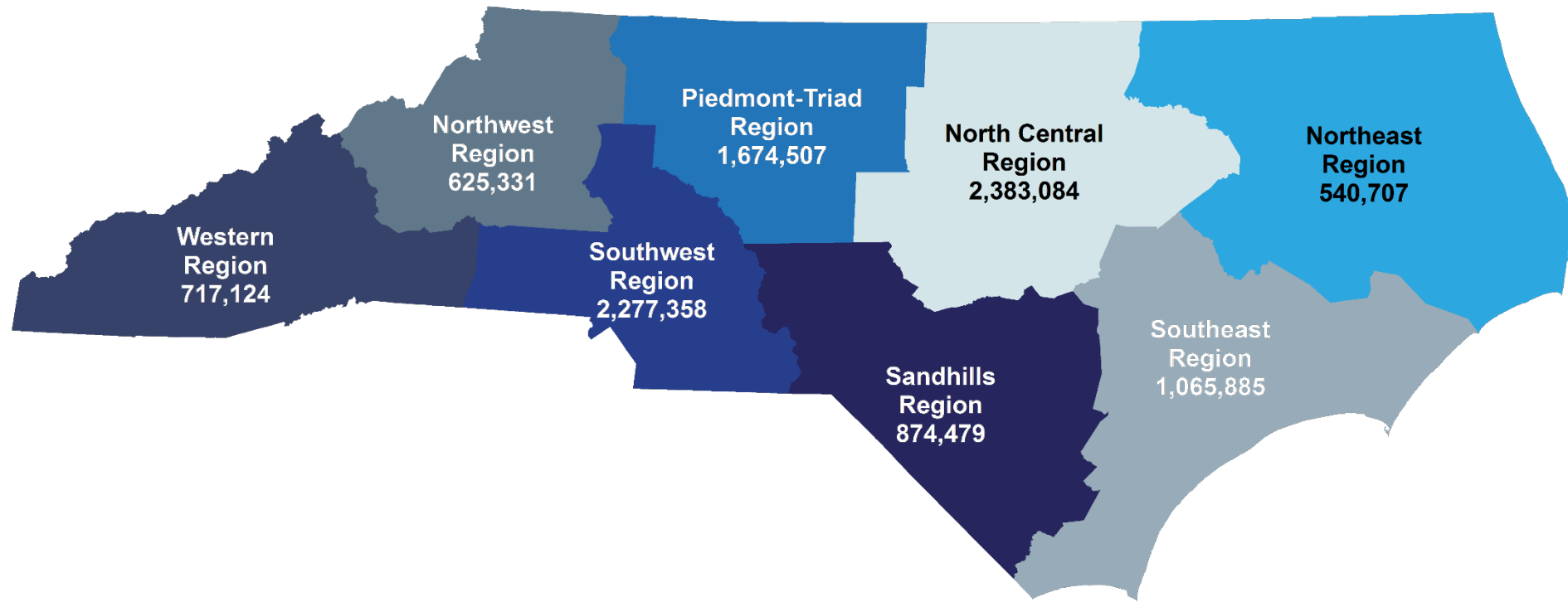


Southeast Region



Prosperity Zone Population Estimates

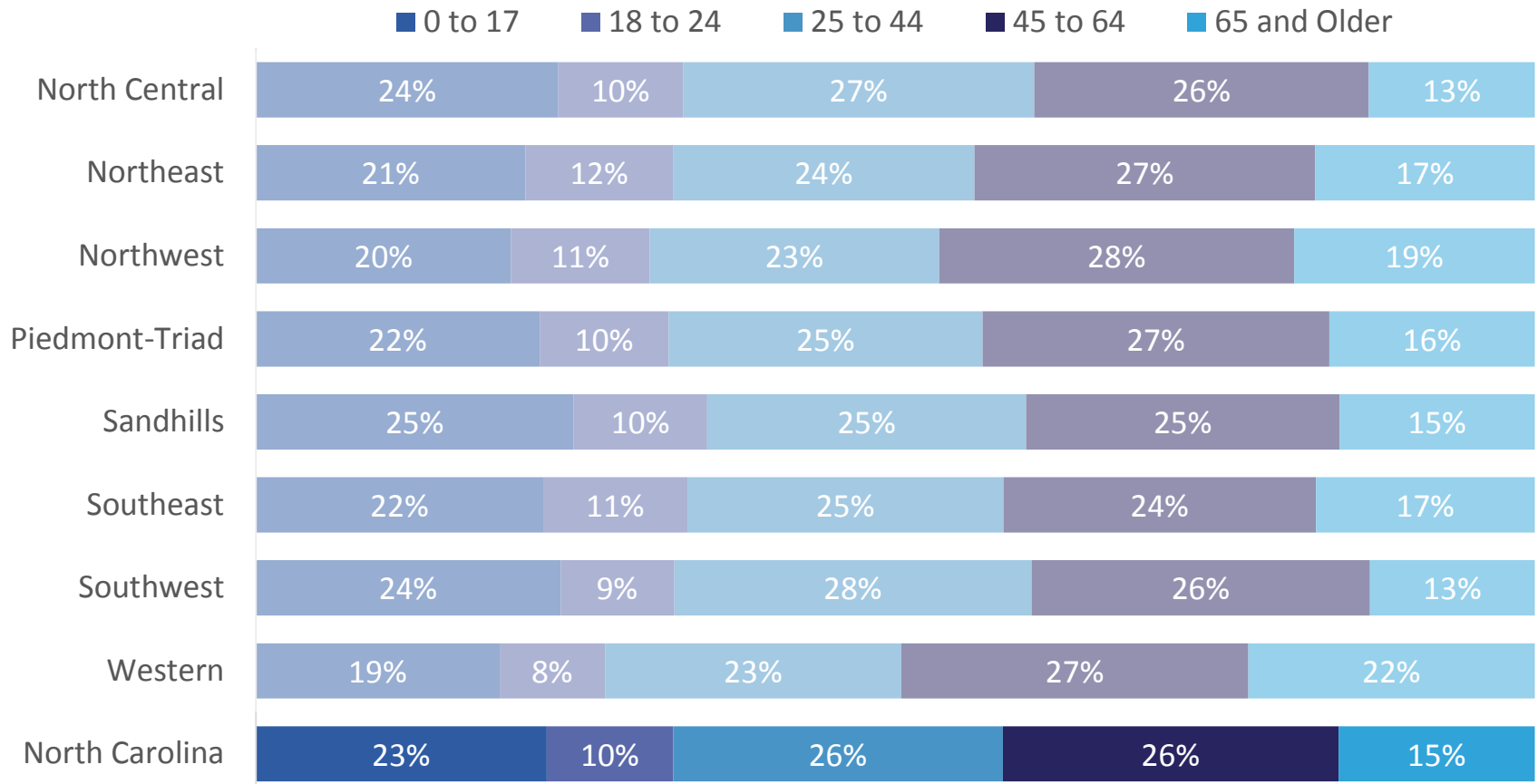
2016



Source: North Carolina Office of State Budget and Management

Population by Age Group

2016



Source: North Carolina Office of State Budget and Management

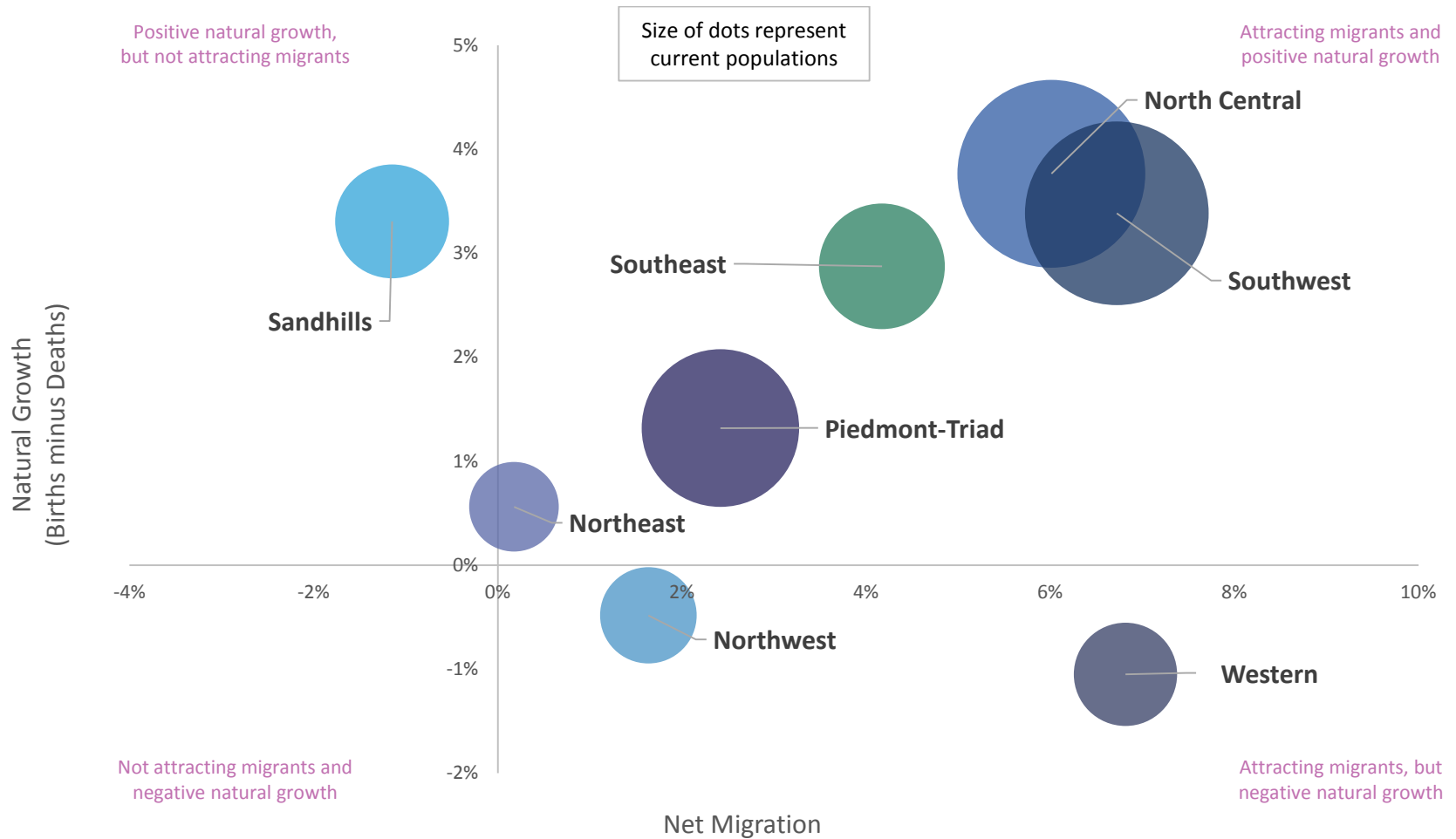
Population Growth

	2011 Population	2016 Population	2021 Population Projection	2011-2016 Change	2016-2021 Projected Change
North Central	2,207,610	2,383,084	2,576,452	7.9%	8.1%
Northeast	536,009	540,707	542,399	0.9%	0.3%
Northwest	622,922	625,331	645,232	0.4%	3.2%
Piedmont-Triad	1,624,896	1,674,507	1,733,545	3.1%	3.5%
Sandhills	870,916	874,479	882,707	0.4%	0.9%
Southeast	1,016,755	1,065,885	1,123,129	4.8%	5.4%
Southwest	2,096,536	2,277,358	2,470,765	8.6%	8.5%
Western	690,346	717,124	760,114	3.9%	6.0%
North Carolina	9,665,990	10,158,475	10,734,343	5.1%	5.7%

Source: North Carolina Office of State Budget and Management

Components of Population Growth

2010 to 2016



Source: North Carolina Office of State Budget and Management

Note: Migration calculated relative to most recent Census year (2010).

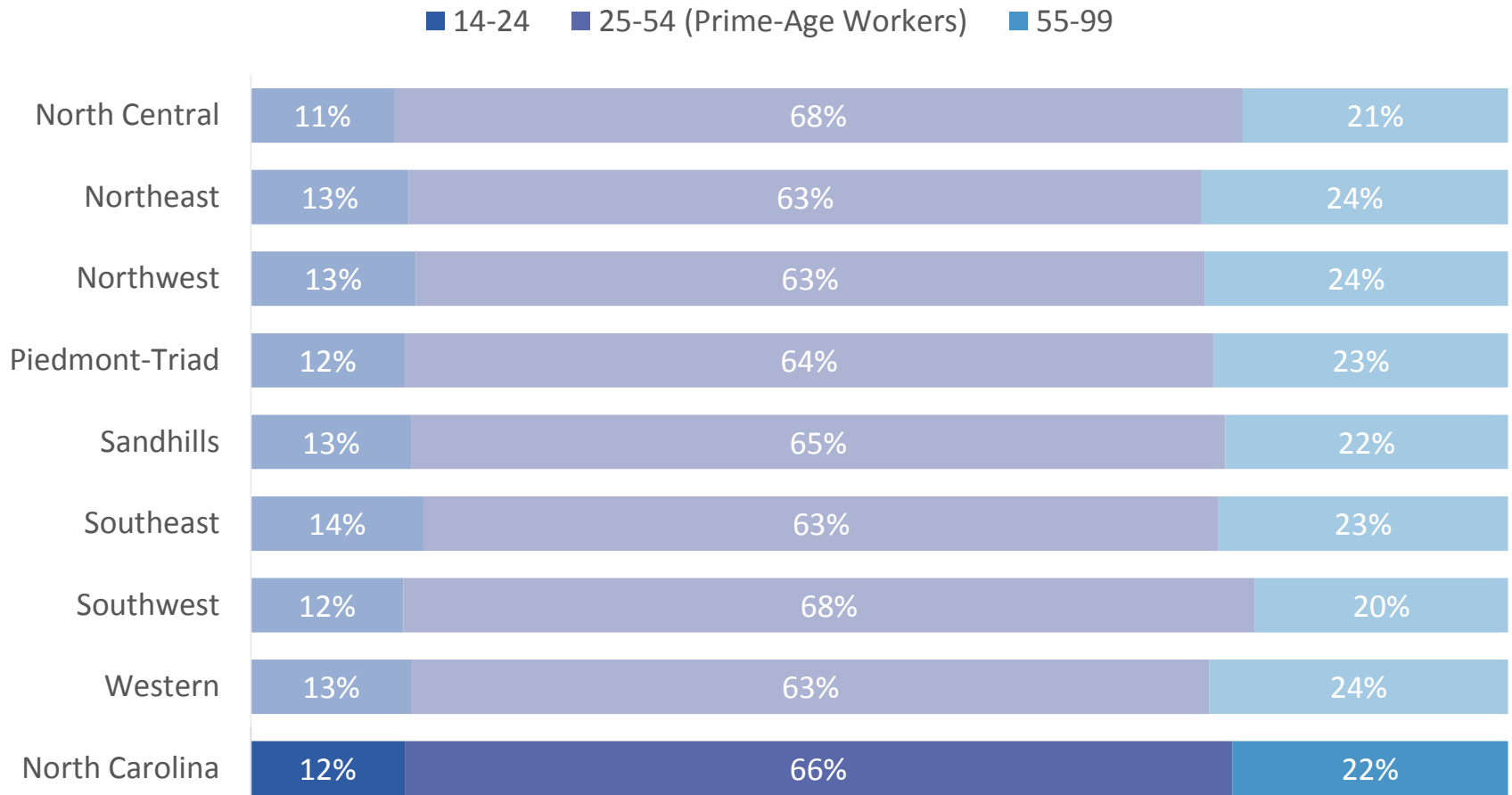
Labor Force Change

	2012 Labor Force	2017 Labor Force	Labor Force Change
North Central	1,124,901	1,228,096	9.2%
Northeast	248,615	244,940	-1.5%
Northwest	290,230	292,701	0.9%
Piedmont-Triad	804,231	816,278	1.5%
Sandhills	351,831	343,912	-2.3%
Southeast	447,955	461,834	3.1%
Southwest	1,092,444	1,217,578	11.5%
Western	319,860	336,363	5.2%
North Carolina	4,680,057	4,941,701	5.6%

Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

Job Holders by Age Group

2016

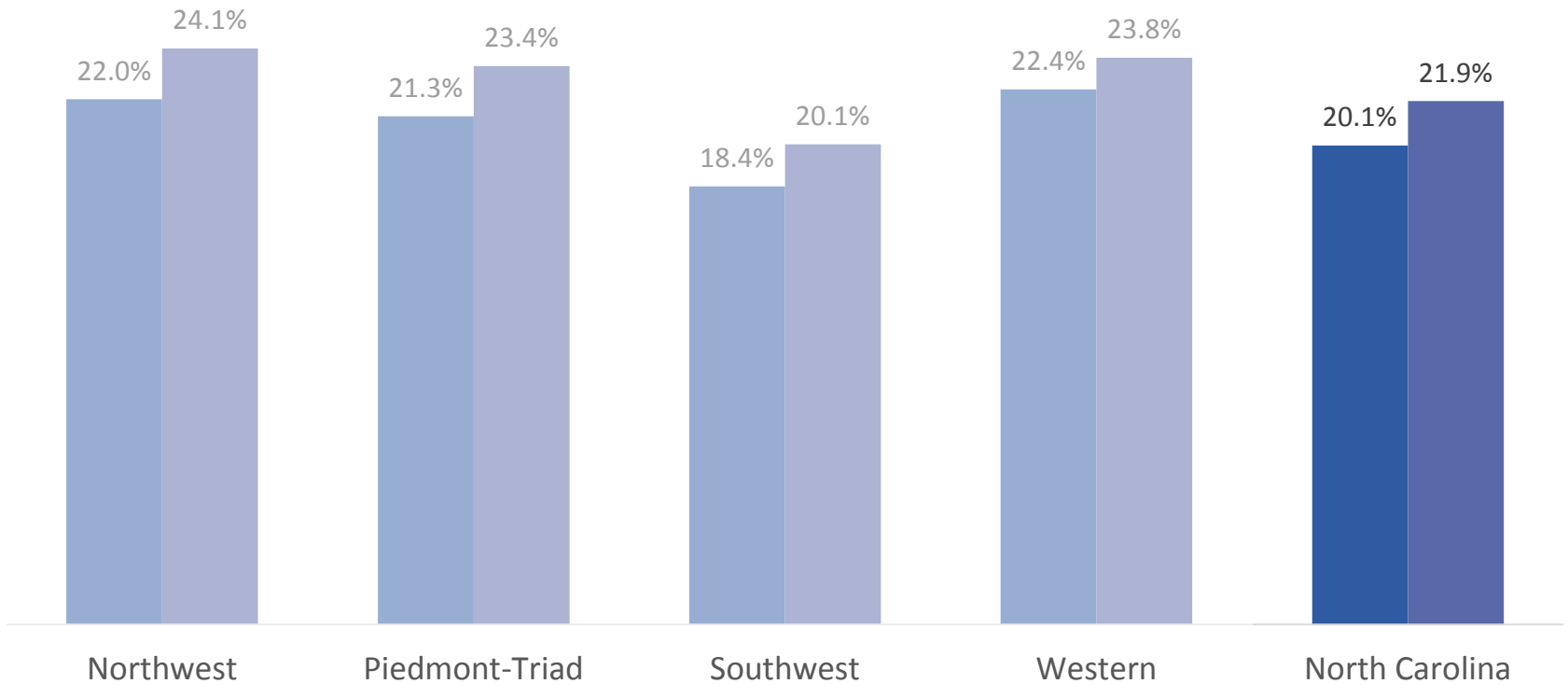


Source: Quarterly Workforce Indicators, US Census Bureau

Percent of Total Employment, Age 55+

Western Prosperity Zones

■ 2011 ■ 2016

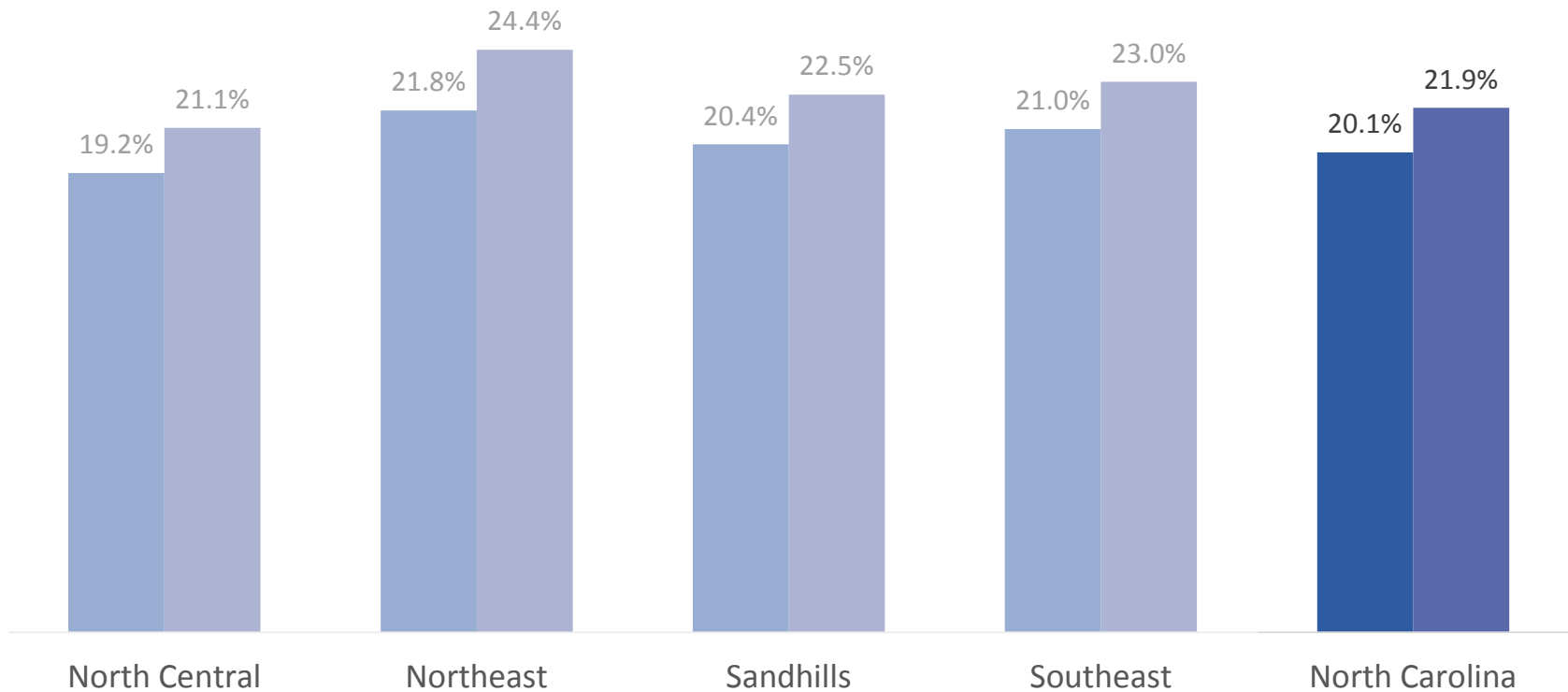


Source: Quarterly Workforce Indicators, US Census Bureau

Percent of Total Employment, Age 55+

Eastern Prosperity Zones

■ 2011 ■ 2016



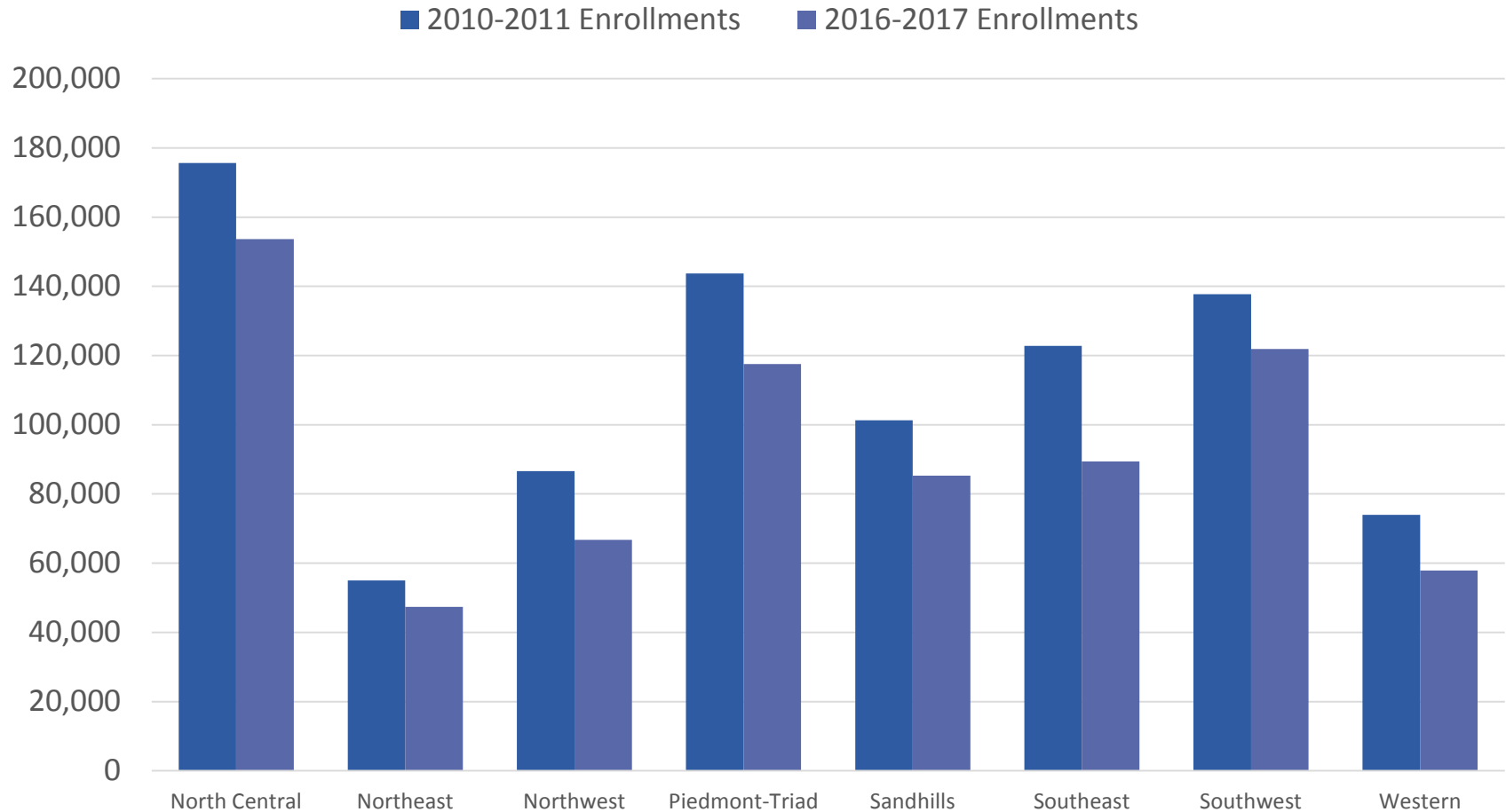
Source: Quarterly Workforce Indicators, US Census Bureau

Average Annual Wages

	2012 Wages (in 2017 dollars)	2017 Wages	Change
North Central	\$51,433	\$53,678	4.4%
Northeast	\$36,879	\$38,332	3.9%
Northwest	\$35,431	\$37,890	6.9%
Piedmont-Triad	\$42,896	\$45,108	5.2%
Sandhills	\$37,214	\$38,265	2.8%
Southeast	\$37,285	\$38,857	4.2%
Southwest	\$52,745	\$56,076	6.3%
Western	\$36,763	\$38,698	5.3%
North Carolina	\$46,067	\$48,911	6.2%

Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Community College Enrollment

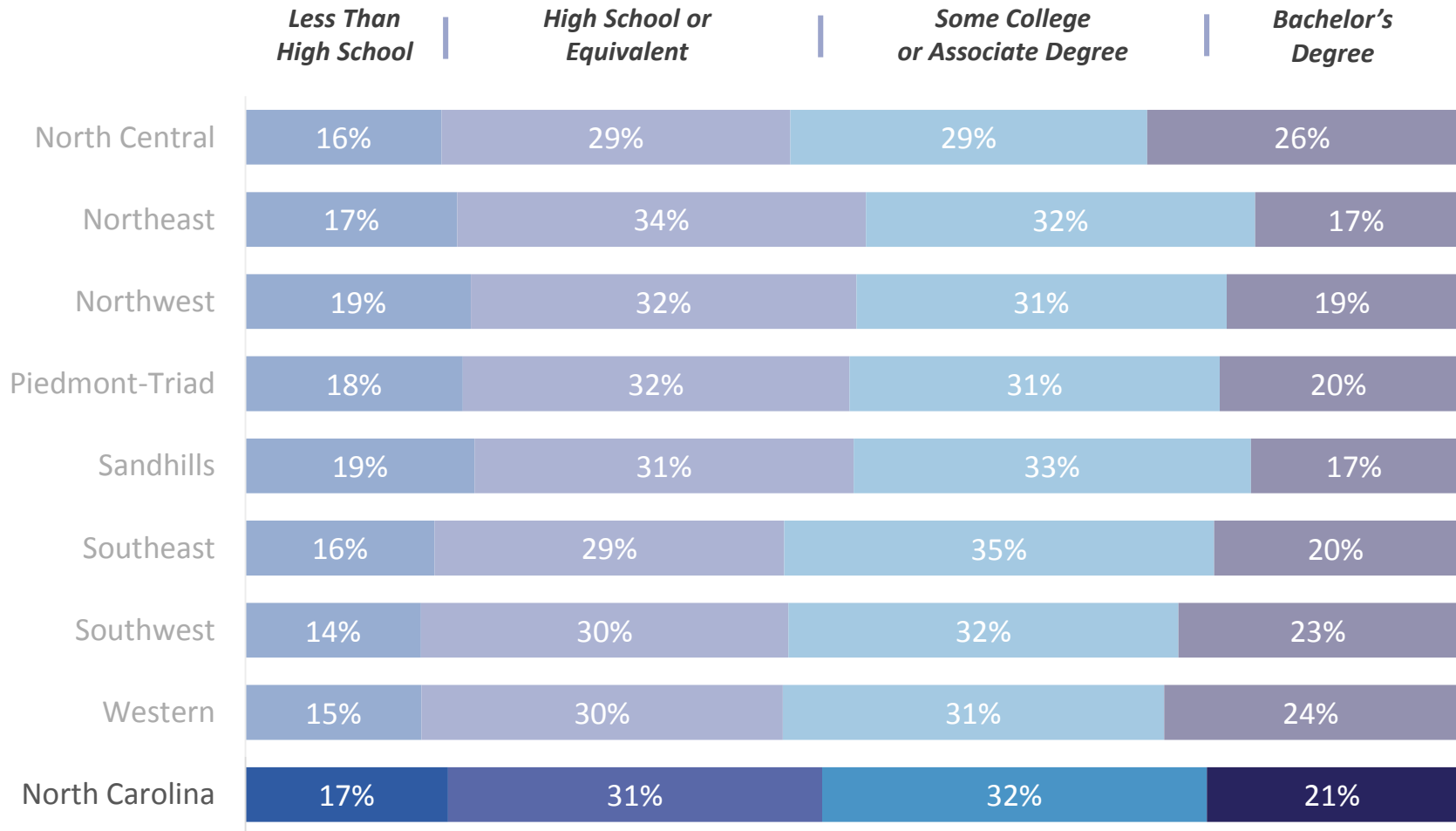


Source: NC Community Colleges, Statistical Reports

Note: Enrollments represent unduplicated headcount of students enrolled in curriculum and continuing education courses.

Educational Attainment, Age 25+

5-Year Estimates, 2012-2016

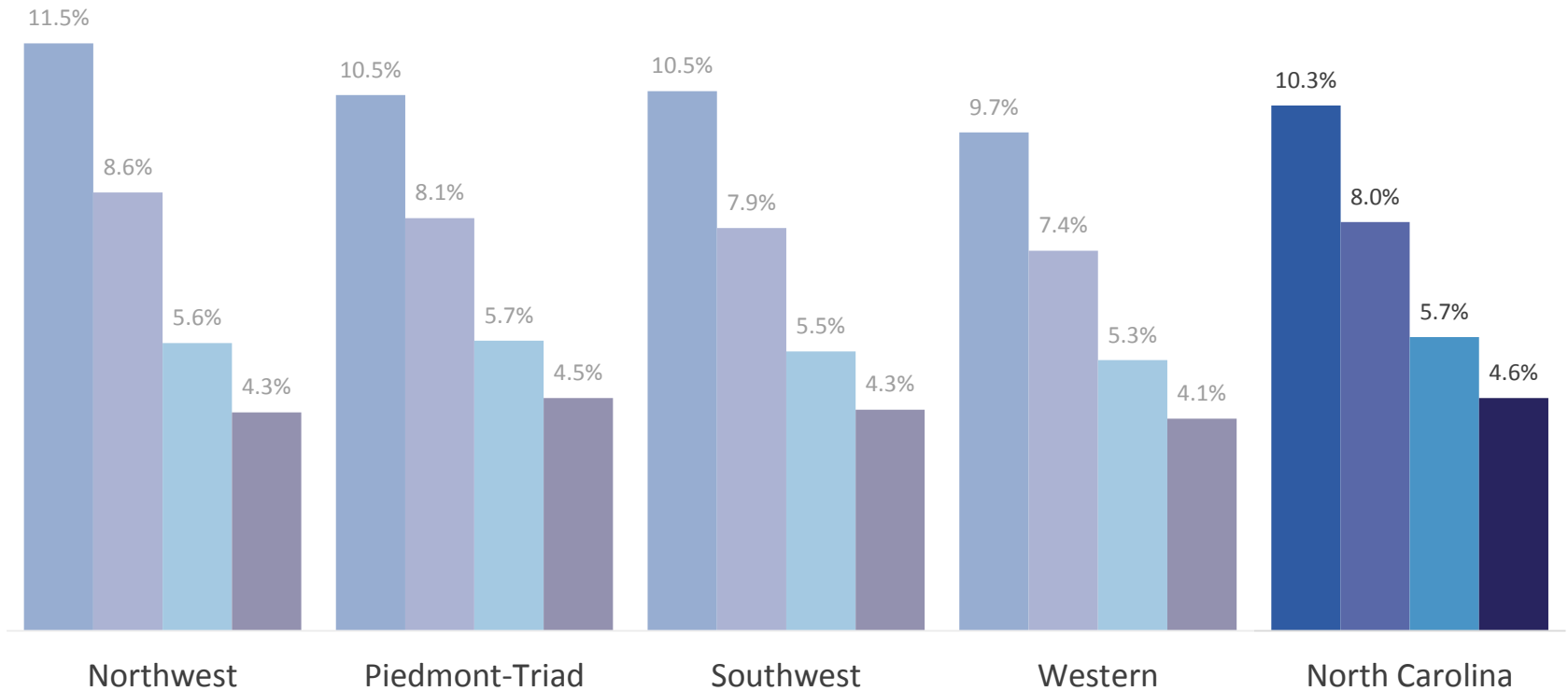


Source: US Census, American Community Survey, 5-year estimates

Unemployment Rate Trends

Western Prosperity Zones

■ 2011 ■ 2013 ■ 2015 ■ 2017

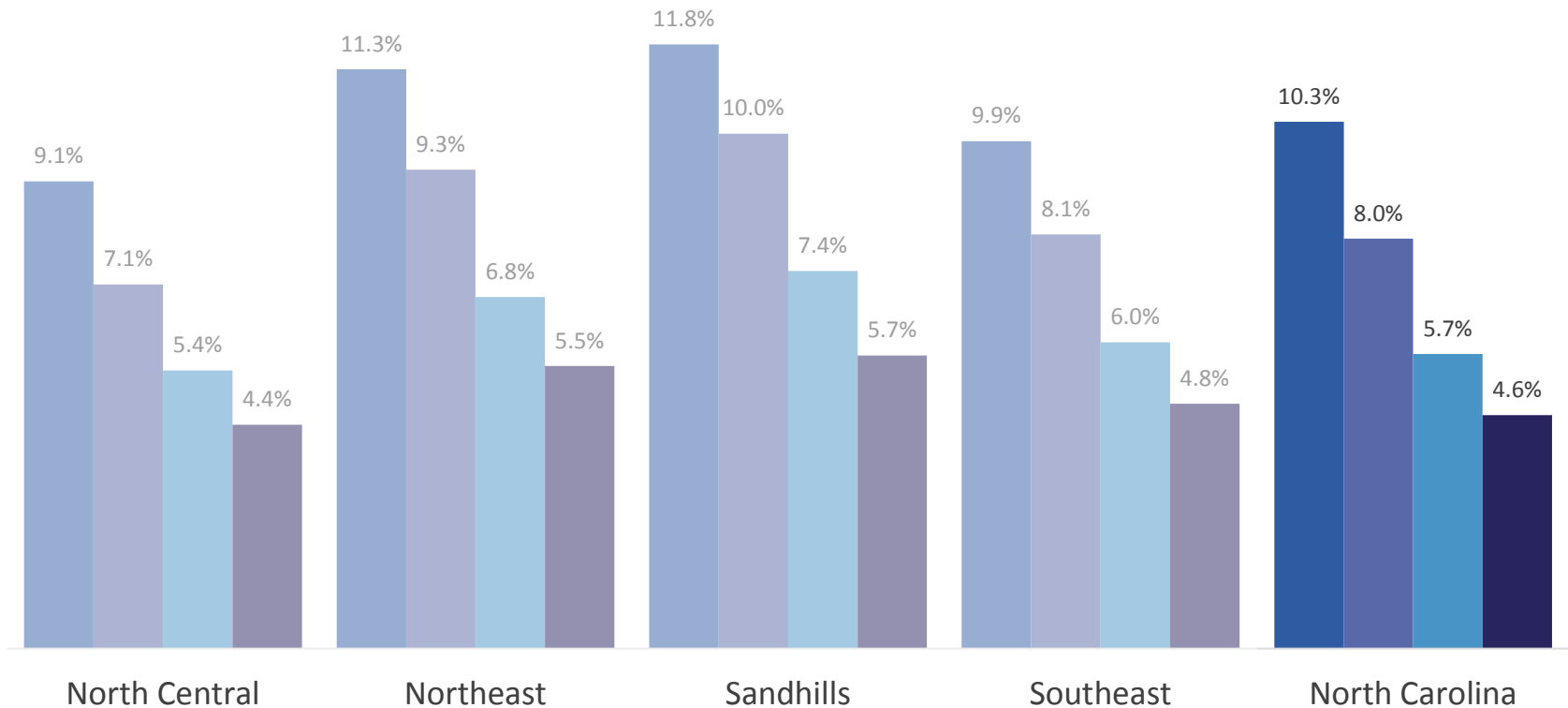


Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

Unemployment Rate Trends

Eastern Prosperity Zones

■ 2011 ■ 2013 ■ 2015 ■ 2017



Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

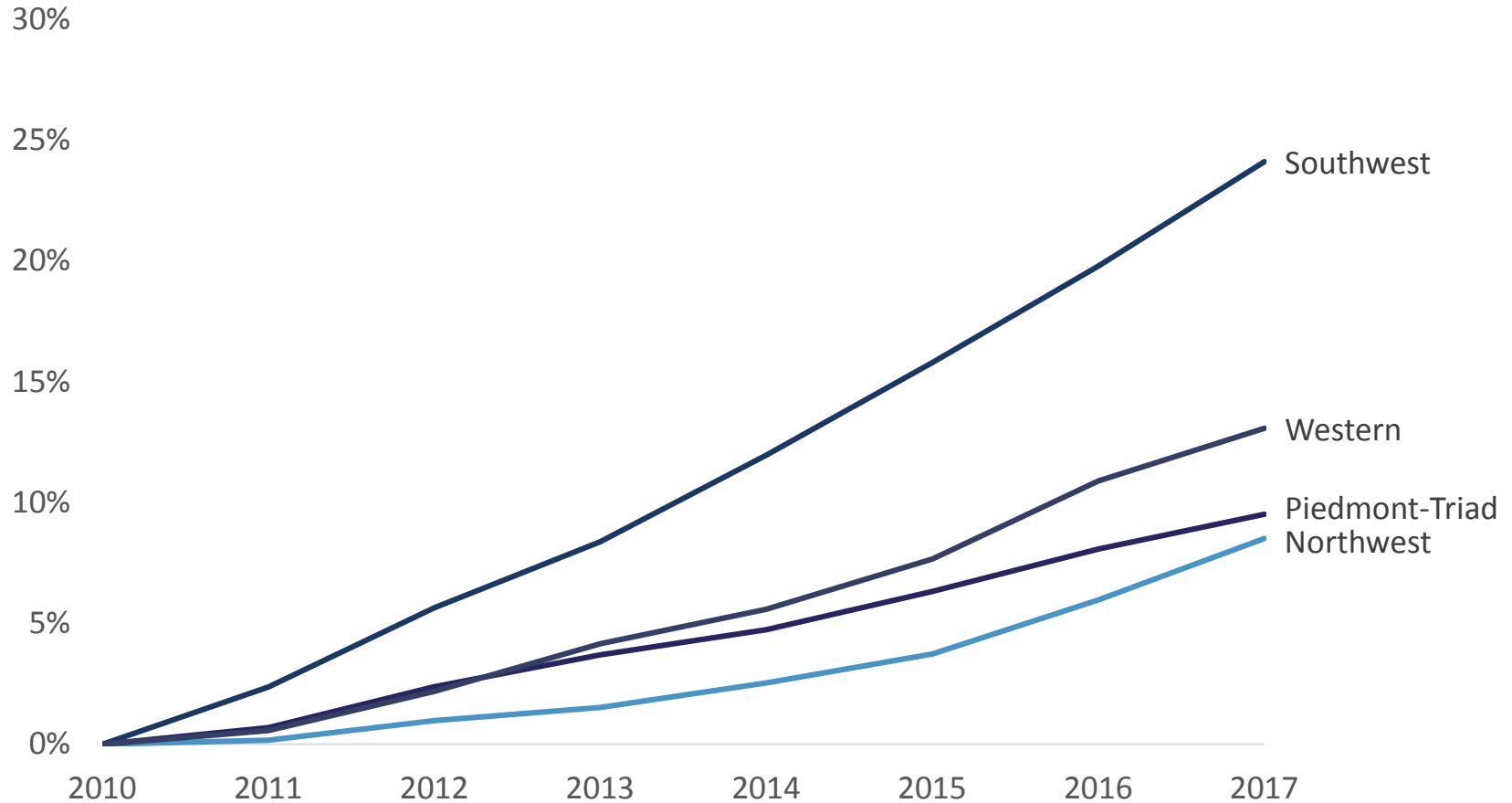
Change in Employed Workers

	2012 Employed	2017 Employed	Change
North Central	1,031,543	1,174,561	143,018
Northeast	222,544	231,453	8,909
Northwest	260,738	280,203	19,465
Piedmont-Triad	728,434	779,143	50,709
Sandhills	312,329	324,278	11,949
Southeast	407,096	439,808	32,712
Southwest	991,615	1,164,958	173,343
Western	291,383	322,430	31,047
North Carolina	4,245,675	4,716,832	471,157

Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

Change in Employed Workers

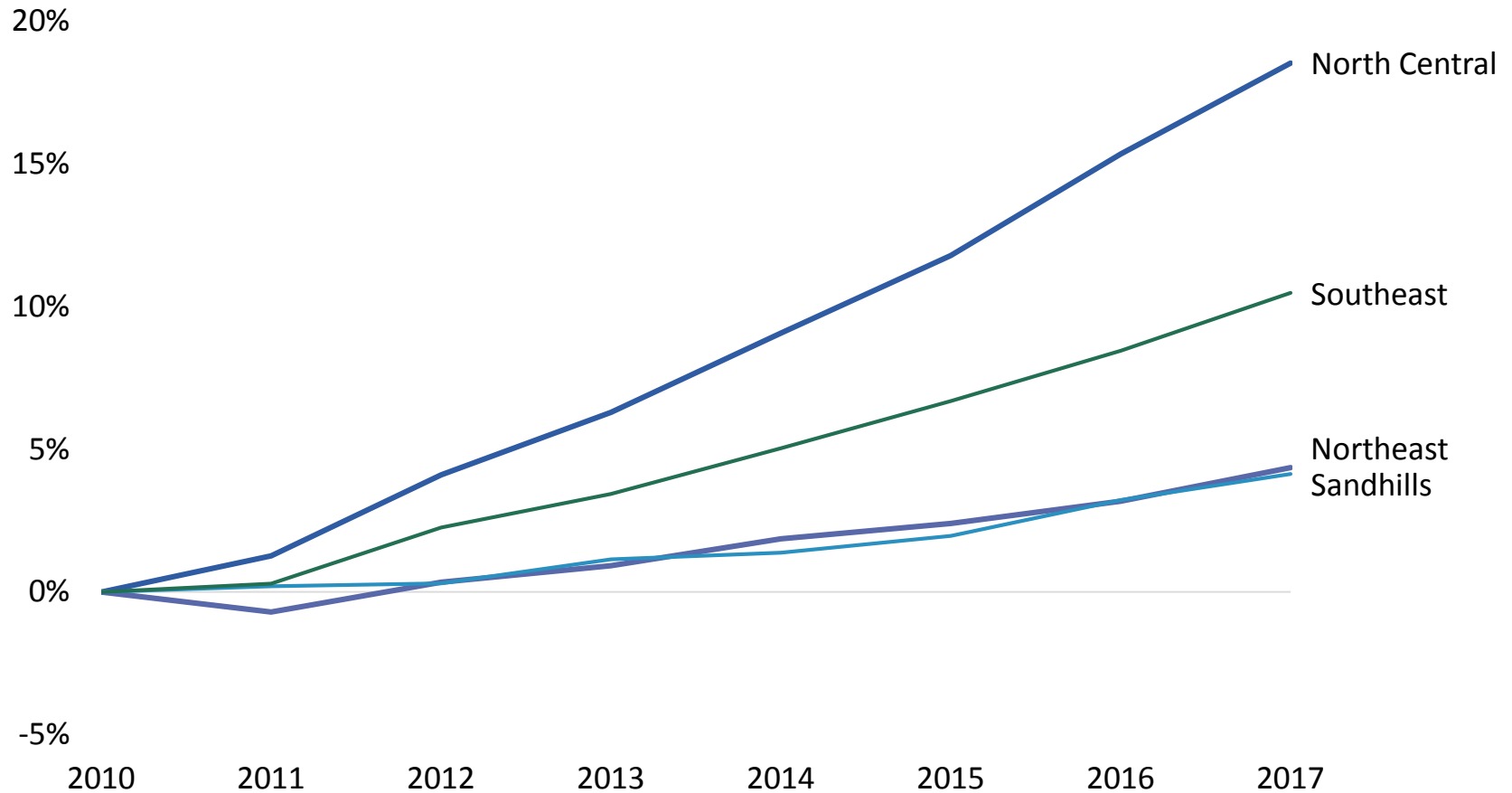
Western Prosperity Zones



Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

Change in Employed Workers

Eastern Prosperity Zones



Source: Local Area Unemployment Statistics (LAUS), NC Dept. of Commerce

Change in Business Establishments

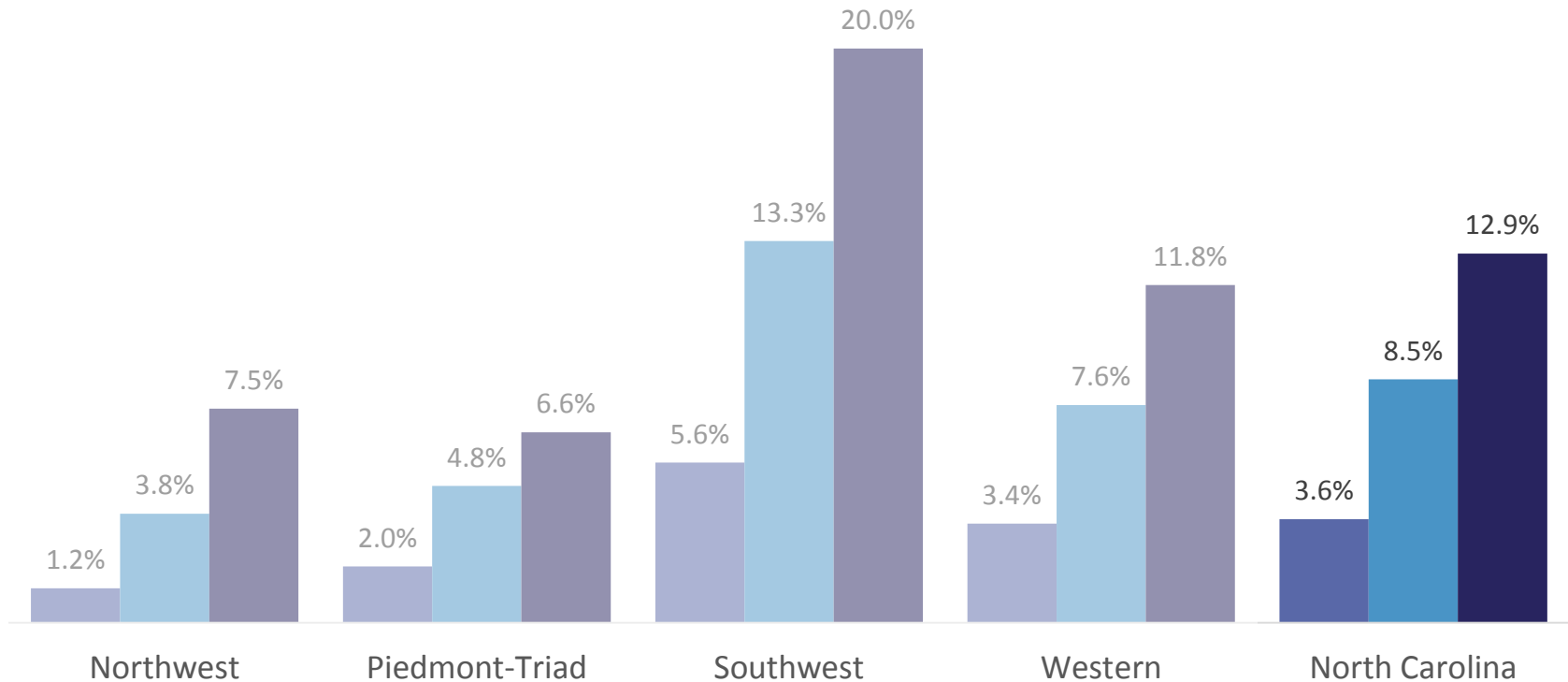
	2012 Establishments	2017 Establishments	Change
North Central	57,890	63,322	9.4%
Northeast	13,191	12,700	-3.7%
Northwest	14,101	13,834	-1.9%
Piedmont-Triad	38,202	38,184	-0.0%
Sandhills	16,418	16,073	-2.1%
Southeast	24,352	25,172	3.4%
Southwest	59,423	65,393	10.0%
Western	19,407	20,596	6.1%
North Carolina	258,708	272,749	5.4%

Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Change in Number of Jobs Since 2011

Western Prosperity Zones

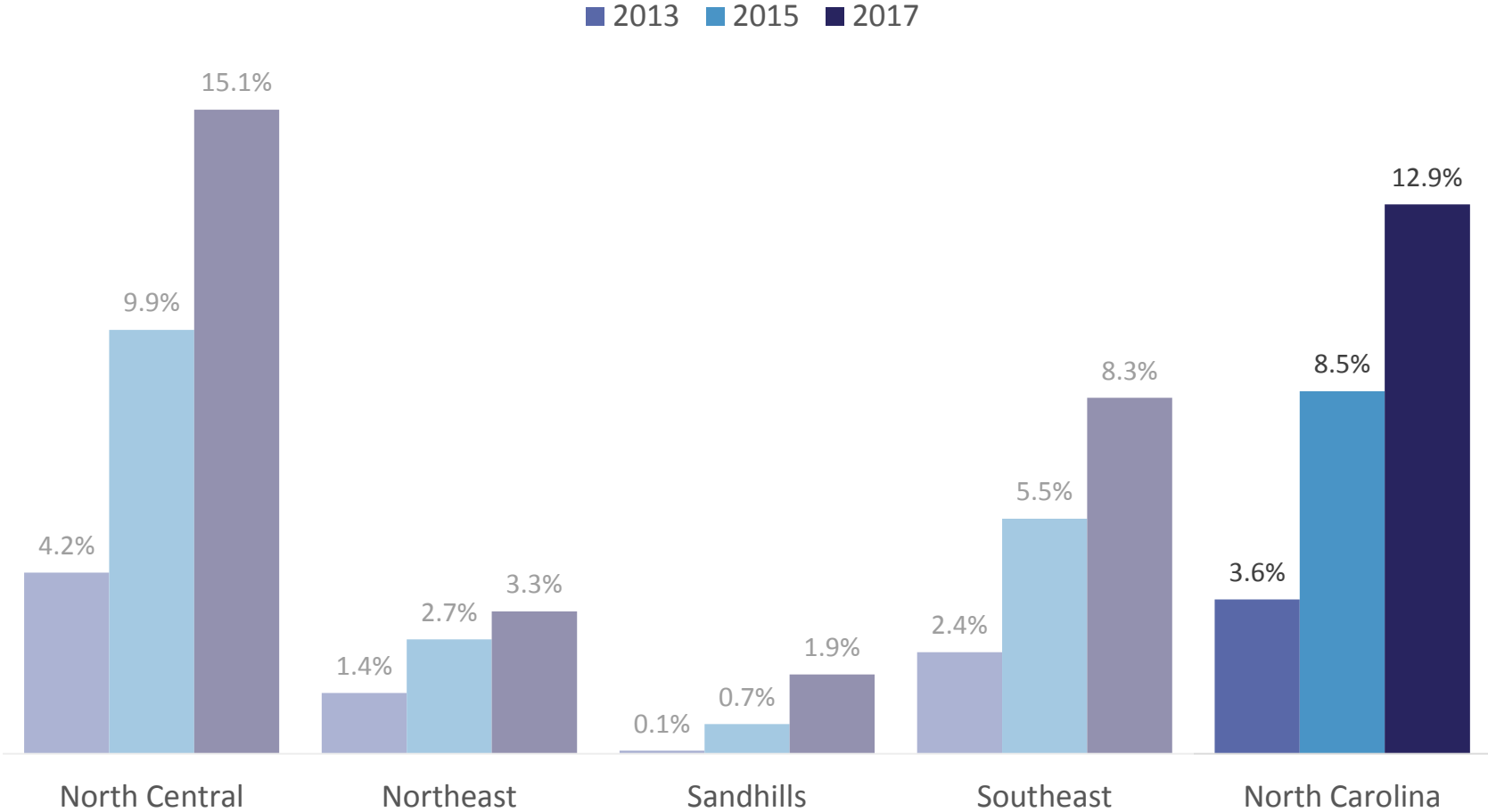
■ 2013 ■ 2015 ■ 2017



Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Change in Number of Jobs Since 2011

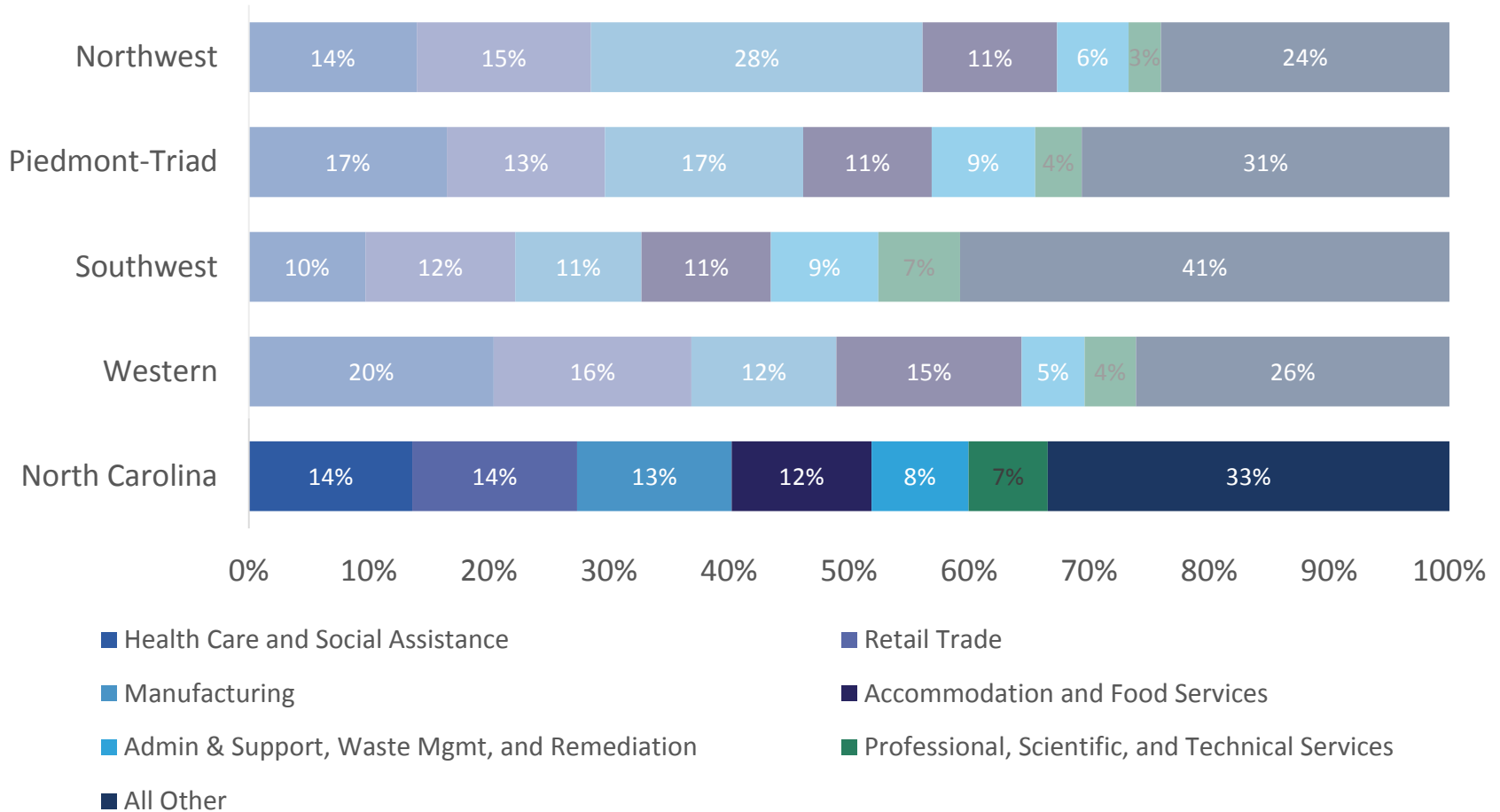
Eastern Prosperity Zones



Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Private Industry Employment, 2017

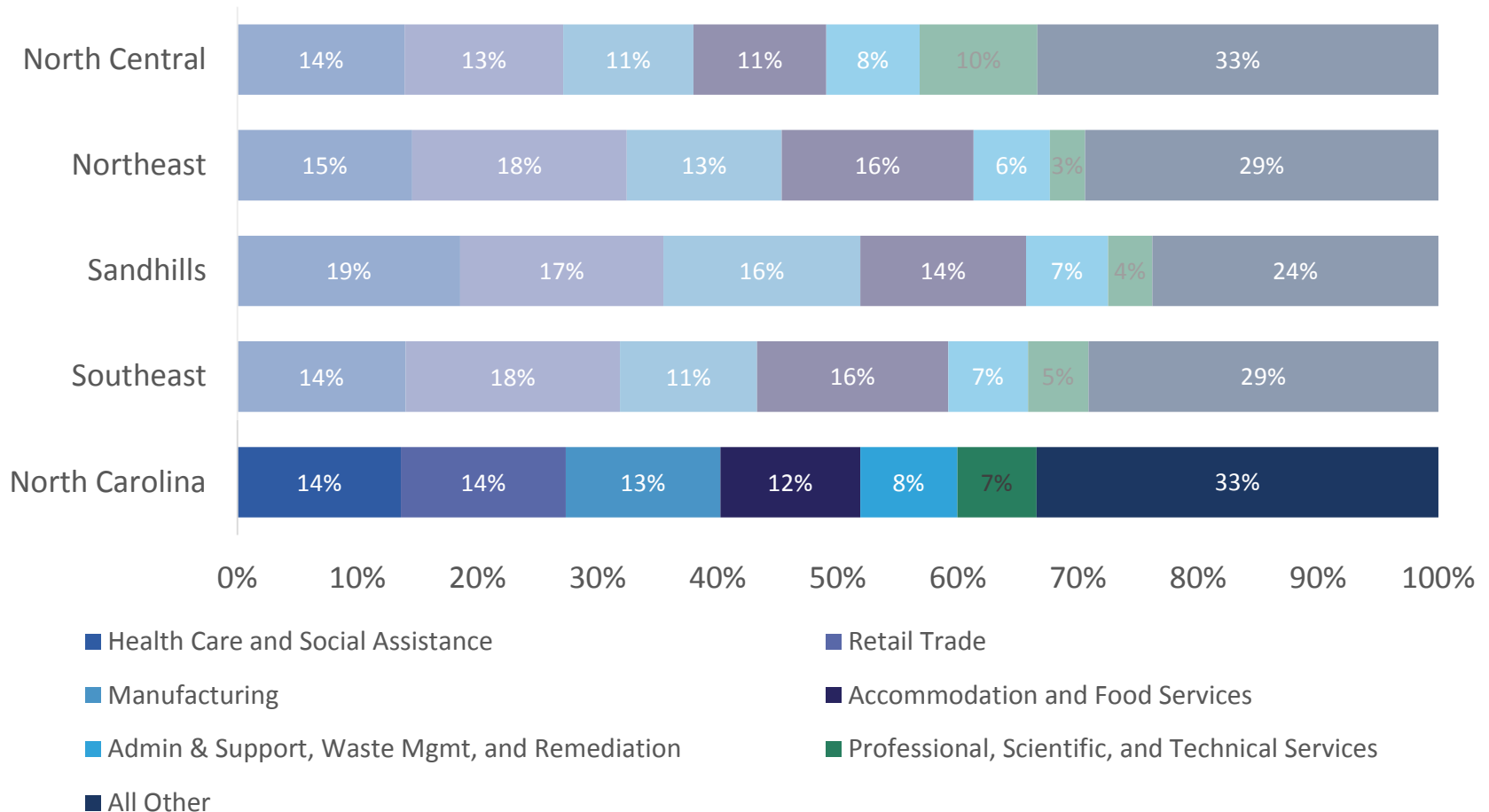
Western Prosperity Zones



Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Private Industry Employment, 2017

Eastern Prosperity Zones



Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Concentration of Industry Employment

Western Prosperity Zones

	2017 Industry Rank #1 - #5	Location Quotient	Jobs	2017 Industry Rank #6 - #10	Location Quotient	Jobs
Northwest	1 Furniture and Related Product Manufacturing	24.96	16,171	6 Chemical Manufacturing	3.51	4,739
	2 Textile Mills	20.50	3,812	7 Plastics and Rubber Products Manufacturing	3.28	3,852
	3 Electrical Equipment, Appliance, and Component Manufacturing	5.54	3,513	8 Nonmetallic Mineral Product Manufacturing	2.11	1,425
	4 Wood Product Manufacturing	3.91	2,549	9 Food Manufacturing	2.10	5,474
	5 Paper Manufacturing	3.61	2,196	10 State Government	1.75	15,462
Piedmont-Triad	1 Textile Mills	19.75	10,775	6 Paper Manufacturing	2.54	4,528
	2 Apparel Manufacturing	7.18	4,243	7 Textile Product Mills	2.20	1,229
	3 Furniture and Related Product Manufacturing	6.25	11,868	8 Electrical Equipment, Appliance, and Component Manufacturing	1.91	3,542
	4 Plastics and Rubber Products Manufacturing	2.55	8,788	9 Wood Product Manufacturing	1.80	3,452
	5 Beverage and Tobacco Product Manufacturing	2.54	3,195	10 Printing and Related Support Activities	1.58	3,377
Southwest	1 Textile Mills	7.54	6,362	6 Credit Intermediation and Related Activities	2.01	39,753
	2 Data Processing, Hosting, and Related Services	3.35	7,818	7 Broadcasting (except Internet)	1.98	4,009
	3 Air Transportation	3.21	11,749	8 Textile Product Mills	1.91	1,655
	4 Performing Arts, Spectator Sports, and Related Industries	2.30	8,268	9 Securities, Commodity Contracts, and Other Financial Investments ar	1.66	11,444
	5 Management of Companies and Enterprises	2.22	37,679	10 Plastics and Rubber Products Manufacturing	1.63	8,705
Western	1 Textile Mills	7.11	1,486	6 Plastics and Rubber Products Manufacturing	2.62	3,456
	2 Museums, Historical Sites, and Similar Institutions	5.48	1,648	7 Accommodation	1.75	6,412
	3 Electrical Equipment, Appliance, and Component Manufacturing	4.89	3,482	8 Food and Beverage Stores	1.60	9,152
	4 Beverage and Tobacco Product Manufacturing	3.47	1,670	9 Building Material and Garden Equipment and Supplies Dealers	1.58	3,739
	5 Paper Manufacturing	3.20	2,187	10 Nursing and Residential Care Facilities	1.53	9,446

Source: Economic Modeling Specialists International

Notes: To qualify for this list, each 3-digit NAICS industry was required to have at least 1,000 jobs in the region. Location Quotient is a ratio that illustrates the state's employment concentration within a particular industry compared to the nation. Calculated as: $(NC \times \text{industry employment} / NC \text{ total employment}) / (US \times \text{industry employment} / US \text{ total employment})$

Concentration of Industry Employment

Eastern Prosperity Zones

	2017 Industry Rank #1 - #5	Location Quotient	Jobs	2017 Industry Rank #6 - #10	Location Quotient	Jobs
North Central	1 Computer and Electronic Product Manufacturing	2.91	22,739	6 Beverage and Tobacco Product Manufacturing	1.88	3,667
	2 Chemical Manufacturing	2.66	16,340	7 Educational Services	1.61	46,602
	3 Textile Mills	2.62	2,215	8 Telecommunications	1.51	8,908
	4 Publishing Industries (except Internet)	2.36	12,839	9 Electrical Equipment, Appliance, and Component Manufacturing	1.31	3,784
	5 State Government	2.31	93,041	10 Professional, Scientific, and Technical Services	1.29	86,804
Northeast	1 Chemical Manufacturing	3.12	3,449	6 Gasoline Stations	2.02	2,527
	2 Paper Manufacturing	3.01	1,494	7 Support Activities for Agriculture and Forestry	1.92	1,361
	3 State Government	2.29	16,554	8 Local Government	1.78	34,210
	4 Crop Production	2.25	1,688	9 Real Estate	1.75	3,807
	5 Wood Product Manufacturing	2.23	1,190	10 Food Manufacturing	1.59	3,385
Sandhills	1 Textile Mills	8.10	2,081	6 Paper Manufacturing	2.26	1,893
	2 Federal Government	5.96	66,561	7 Wood Product Manufacturing	2.18	1,970
	3 Animal Production and Aquaculture	3.87	2,312	8 Plastics and Rubber Products Manufacturing	2.07	3,362
	4 Apparel Manufacturing	3.79	1,053	9 Support Activities for Agriculture and Forestry	1.49	1,784
	5 Food Manufacturing	3.66	13,186	10 Gasoline Stations	1.38	2,933
Southeast	1 Chemical Manufacturing	3.12	3,449	6 Gasoline Stations	2.02	2,527
	2 Paper Manufacturing	3.01	1,494	7 Support Activities for Agriculture and Forestry	1.92	1,361
	3 State Government	2.29	16,554	8 Local Government	1.78	34,210
	4 Crop Production	2.25	1,688	9 Real Estate	1.75	3,807
	5 Wood Product Manufacturing	2.23	1,190	10 Food Manufacturing	1.59	3,385

Source: Economic Modeling Specialists International

Notes: To qualify for this list, each 3-digit NAICS industry was required to have at least 1,000 jobs in the region. Location Quotient is a ratio that illustrates the state's employment concentration within a particular industry compared to the nation. Calculated as: $(NC \times \text{industry employment} / NC \text{ total employment}) / (US \times \text{industry employment} / US \text{ total employment})$

Largest Manufacturing Industries

Western Prosperity Zones

	Top Manufacturing Industries	2012 Employment	2017 Employment	2012-2017 Change
Northwest	Furniture and Related Product	14,872	15,817	6.4%
	Food	4,898	5,535	13.0%
	Chemical	3,090	4,279	38.5%
	Plastics and Rubber Products	3,254	4,029	23.8%
Piedmont-Triad	Furniture and Related Product	11,129	13,031	17.1%
	Textile Mills	9,260	9,789	5.7%
	Fabricated Metal Product	8,376	9,257	10.5%
	Plastics and Rubber Products	7,389	9,148	23.8%
Southwest	Machinery	10,253	11,875	15.8%
	Fabricated Metal Product	10,404	11,316	8.8%
	Transportation Equipment	10,158	9,946	-2.1%
	Food	8,185	9,850	20.3%
Western	Plastics and Rubber Products	2,991	3,278	9.6%
	Electrical Equip., Appliance, Comp.	3,345	3,259	-2.6%
	Transportation Equipment	1,940	2,618	34.9%
	Machinery	1,991	2,095	5.2%

Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Largest Manufacturing Industries

Eastern Prosperity Zones

	Top Manufacturing Industries	2012 Employment	2017 Employment	2012-2017 Change
North Central	Computer and Electronic Product	22,925	23,328	1.8%
	Chemical	20,249	17,398	-14.1%
	Machinery	7,012	8,201	17.0%
	Food	6,374	6,910	8.4%
Northeast	Food	3,359	3,912	16.5%
	Chemical	3,041	3,313	8.9%
	Paper	1,490	1,512	1.5%
	Transportation Equipment	1,070	1,462	36.6%
Sandhills	Food	12,500	12,378	-1.0%
	Plastics and Rubber Products	3,801	3,333	-12.3%
	Textile Mills	2,335	3,143	34.6%
	Paper	1,988	2,069	4.1%
Southeast	Food	10,321	11,583	12.2%
	Transportation Equipment	3,262	3,684	12.9%
	Fabricated Metal Product	2,613	2,833	8.4%
	Electrical Equip., Appliance, Comp.	2,108	2,477	17.5%

Source: Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce

Taxable Retail Sales Growth

Inflation-adjusted dollars

	FY 2011-2012 (in millions)	FY 2016-2017 (in millions)	Change	% of FY 2016- 2017 NC Retail Sales
North Central	\$23.9	\$32.5	36.2%	23.4%
Northeast	\$5.8	\$6.8	16.8%	4.9%
Northwest	\$5.3	\$6.4	20.7%	4.6%
Piedmont-Triad	\$16.1	\$19.8	23.1%	14.2%
Sandhills	\$7.5	\$8.5	13.3%	6.1%
Southeast	\$10.7	\$12.9	20.2%	9.3%
Southwest	\$26.1	\$34.7	33.2%	24.9%
Western	\$7.2	\$9.8	36.6%	7.0%
North Carolina	\$109.9	\$139.2	26.7%	N/A

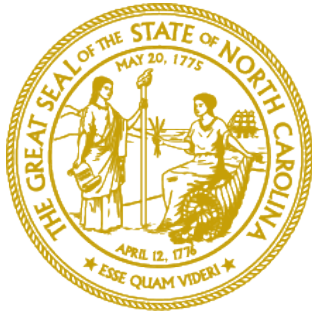
Source: NC Department of Revenue, State Sales and Use Tax Reports by Fiscal Year, Table 3

Impacts of the Tourism Industry

2016

	Expenditures (millions)	Payroll (millions)	State Tax Receipts (millions)	Employment	
				Tourism-Related Jobs	% of Total Jobs
North Central	\$4,208	\$1,077	\$218	42,080	4.0%
Northeast	\$1,901	\$370	\$95	19,760	10.3%
Northwest	\$1,073	\$202	\$56	9,700	4.1%
Piedmont-Triad	\$2,972	\$615	\$166	26,040	3.7%
Sandhills	\$1,414	\$267	\$77	13,220	4.7%
Southeast	\$2,213	\$430	\$111	21,000	5.8%
Southwest	\$6,650	\$2,051	\$331	63,280	5.9%
Western	\$2,501	\$530	\$130	24,100	9.2%
North Carolina	\$22,932	\$5,543	\$1,182	219,180	5.1%

Sources: Economic Development Partnership of North Carolina, Travel Economic Impact Model (TEIM). Quarterly Census of Employment & Wages (QCEW), NC Dept. of Commerce.



NORTH CAROLINA

Department of Commerce

Labor & Economic Analysis Division

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