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December 30, 2013

A Competitive Realities Report of New Hanover County, North Carolina

Prepared for the

New Hanover County Commission

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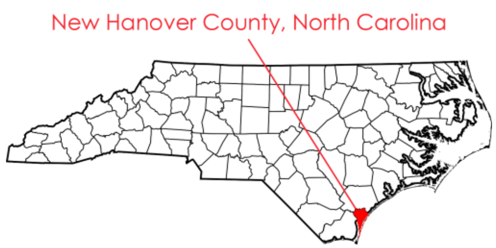
TABLE OF CONTENTS

INTRODUCTION

In August 2013, The New Hanover County Commission retained Garner Economics, LLC to conduct an economic development strategy that will build on the County's rich natural, cultural, and historical resources and to develop an action plan to strengthen existing industries and identify emerging ones to increase private investment and job retention.

The focus of this engagement is for the County to understand the product improvement, marketing, and organizational changes it must make to ensure that New Hanover County strengthens its competitive position and is able to attract and retain the types of businesses that will create jobs and opportunities for its citizens.



Specifically, the scope of services for the overall project includes:

(1) A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;

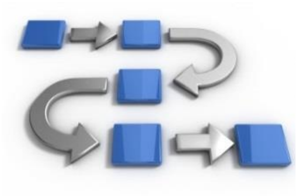
(2) An Assets and Challenges Assessment (A&C) of the County from the eyes of a site location consultant that facilitates investment decisions;

(3) Recommended business targets suitable for the County based on our research and analysis; and finally,

(4) A set of implementable recommendations that the leadership in the County can utilize to enhance the economic well-being of the area and make New Hanover County a desirable business location and enhance its quality of place.

This *Competitive Realities Report* (CRR) is the first of two reports that will be provided to the County. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I (see Figure 1 on page 4).

Methodology



The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the Assets and Challenges Assessment. Together, the Assets and Challenges Assessment, Benchmarking Scorecard, and Stakeholder Input form a body of knowledge and data around which the strategy and its recommendations will be built.

The CRR offers no recommendations. The final strategy report will consist of the business target recommendations along with conclusions and recommendations for how New Hanover County can enhance its global competitiveness. (It will be presented in early 2014.)

Assets and Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an Assets and Challenges Assessment of the County. This was done through a windshield tour of the area and against a set list of 63 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the County based on the qualities, elements, and infrastructure that a business will look for when considering the County as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess New Hanover that we use when engaged by a corporate client in evaluating communities for possible investment. The assessment allows us to document challenges that exist in the region that constitute barriers to successful economic development. By knowing what challenges or gaps exist, the County can take the steps necessary to ameliorate the situation, strengthen its overall "product," and be a more attractive business location. Likewise, by knowing its strengths, the County can better leverage them in its efforts to attract businesses.

The objectives of the Assets and Challenges Assessment are to:

- Help local leaders understand the County's potential so that they can best develop realistic goals;
- Identify key strengths to emphasize in economic development marketing efforts; and
- Identify key weaknesses that may limit investment in the County so that remediation of these local challenges may occur.

The findings of the A&C will supplement the economic analysis to be conducted in the business targeting scope element.

Figure 1: Project Phases

Phase I: Discovery	Phase II: Strategy	Phase III: Implementation Recommendations
Evaluate New Hanover County's competitive position from an economic development perspective ▪ Economic Analysis ▪ Labor Analysis ▪ Assets and Challenges Assessment (A&C) ▪ Cluster Analysis/ Business Target Identification **Solicit public input through focus groups and stakeholder interviews**	Position New Hanover County to achieve success based on qualitative and quantitative analysis collected in Phase I ▪ Short- and long-term strategies (one- through five-year) including product improvement needs and industry targeting ▪ Business recruitment and marketing strategies ▪ Product improvement (community development) strategies based on sustaining and growing a competitive advantage	High-level implementation plans for actionable items, including: ▪ Marketing and promotion (Messaging to the targeted industry sectors) ▪ Workforce development recommendations ▪ Organizational recommendations for best practice service delivery in economic development for New Hanover County **Presentation of final report to external audiences**

Benchmarking

Because New Hanover County must compete with other geographies—including those globally—it is important to understand where the County stands compared to those key competitors. To conduct such benchmarking, Garner Economics evaluated key demographic and economic indicators for the County and compared the community to statewide and national-level data, as well as to Mobile County, AL and Greenville County, SC. These benchmark geographies were selected by the strategy Steering Committee.

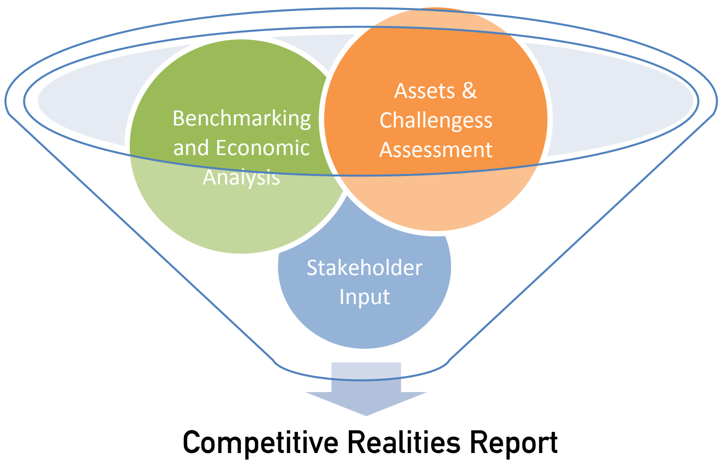
The variables against which New Hanover County and the other benchmark counties, the nation, and the state were compared include:

- Growth trends
- Age group composition
- Race and ethnicity
- Crime rates
- STEM completions
- Migration trends & sources of change
- Composition & sources of income
- Proprietor trends
- Wage comparison
- Retail leakage analysis
- Employment growth
- Unemployment trends
- Exports

Stakeholder Input

Finally, as a complement to the assessment of the physical and regulatory structure of New Hanover County against its benchmarked peers, Garner Economics conducted six focus groups with regional stakeholders to solicit a variety of perceptions of the County's and City's business climate and areas for improvement. The focus groups were followed by an electronic survey to help validate and gain further perspectives on issues that were raised in the focus groups. One hundred one people participated in the six focus groups, and 897 people completed the electronic survey.

The following chapters describe our findings within a cohesive economic assessment of New Hanover County's current state and economic potential. It sets the groundwork for developing strategies and recommendations to assist the County in providing excellent economic development service delivery within the scope of its mission.



CHAPTER 1: STAKEHOLDER INPUT ON BUSINESS CLIMATE AND ECONOMIC COMPETITIVENESS

October 16-17, 2013, Garner Economics held six focus group sessions with stakeholders of New Hanover County and the City of Wilmington to solicit their perceptions and opinions of the area's business climate.

A total of 101 people participated in the six groups. The focus groups were organized into the following categories: large employers; small and medium-sized employers/entrepreneurs; educators and workforce development; government and elected officials; nonprofits; and PR/marketing/media. Invitations to participate in one of the focus groups were distributed by New Hanover County. Participants were chosen by the Steering Committee because they are representative of the focus group categories and have knowledge of issues impacting the area's business climate and its effect on companies and employers.

An electronic survey based on the focus group responses was distributed to a larger group of stakeholders in the area to further test and validate a subset of the questions asked in the focus groups. The survey was open November 8-18, 2013. There were 897 unique surveys completed. Survey respondents represented the broader New Hanover County/Wilmington community.

The first half of this chapter summarizes the key themes emerging from the focus group exercise and includes a summary of the responses received from the various groups. The second half of the chapter provides the results of the electronic survey.

Focus Group: Key Themes

Among the six focus groups, the following key themes emerged. *Note: These are specific comments from the focus groups and survey respondents. Garner Economics recognizes that they may not necessarily be statements of fact, but are opinions and/or perceptions.*

Assets

- The area's quality of life, healthcare, access to the beach, and transportation infrastructure (including the port) were the responses noted most often when participants were asked to list the assets of, and innovative programs in, New Hanover County/Wilmington. Additionally, participants noted the presence of the University of North Carolina Wilmington and the various marine biotechnology efforts underway, as well as the related training and other programs of Cape Fear Community College. Other participants noted the existence and growth of the film industry and the access to other recreational activities and natural environment in the area.
- To a lesser but still prominent extent, participants noted the thriving arts culture in the area (especially for an area the size of New Hanover County/Wilmington), the temperate climate, historic downtown, and the many amenities afforded the community since it is a large tourist destination.

- While they agreed that more needs to be done to develop it, as noted above, participants listed the presence of the port as an asset for the County and region. They also noted that the airport is quite good considering the population of the area served.

Challenges

- Participants in all of the groups suggested that the lack of effective public leadership and the absence of a unified vision of what the community wants its economy to be are seriously impeding New Hanover County/Wilmington's ability to improve or compete as a top location for business. In addition to the negative perceptions of the Special Use Permit (SUP), all groups pointed to the restrictive nature of development in both the City and the County and the respective jurisdictions' inability to implement programs as severe impediments to further investment. Many noted that the area has a reputation of being "anti-business."
- Additionally, participants commented that the perception of the area as "anti-business" was heightened because of public debates over recent locales (i.e., Titan), decisions over whether or not to build certain infrastructure, and the growing influence of vocal environmental or anti-growth activists.

> "We don't have an identity, due to a lack of solid leadership in the County and City government. There's no direction."
>
> —Focus group participant

- In regard to the area's physical and geographic situation, participants noted the size and geography of the County and aging infrastructure as constraints to the area's potential. There are few available parcels left for industrial or large commercial development, and environmental constraints add another layer of complications to development.
- Other negative attributes cited include: a "beach mentality," or the perception that the area's workforce is relaxed and not hard-working; the resistance to change; the prevalence of lower-wage hospitality and service jobs; lack of opportunities for trailing spouses; and the area's distance from other large population centers.
- Another inhibitor to a stronger business climate is the lack of a regional approach to economic development. Participants noted that the area's value proposition to companies potentially locating in the area would be much greater if one considers the assets, market, and reach of the neighboring counties (Pender and Brunswick).
- The availability of quality labor was also noted as an inhibitor for existing and new companies in New Hanover/Wilmington. Businesses reported difficulty in finding highly skilled workers with the necessary training. Further, several noted that, as a result of the low wage-level of the region and the higher housing costs, many potential personnel are hesitant to relocate to the area.

Product/Business Climate

- When asked to rank the business climate for New Hanover County and the City of Wilmington separately on a scale of 1 to 5 (with 5 being the highest), participants as a whole gave both jurisdictions "below average" scores. A rating of 3 is considered average. Anything higher than 3 is considered good; below 3 is poor.
- On average, New Hanover County was scored higher than Wilmington (2.70 versus 2.58). The Large Employer group gave the lowest average scores (for both), and Government and Elected Officials gave the highest average scores (for both). The only score given that was above average (3.22) was by the Government and Elected Officials group for New Hanover County. Government and Elected Officials ranked the business climate the highest of any focus group.
- In addition to the comments noted in the Challenges section, participants said they scored the area's business climate low because of the reactive and cumbersome nature of regulations and permitting.
- On a positive note, a few respondents noted that the City and County are improving. They noted the alignment between the two on various rules governing development and noted that each has been working to expedite the permitting process.

"The County and City are not very predictable—companies don't know what to expect."

—Focus group participant

Needs

- When asked what infrastructure (hard or soft) is lacking in the area, many groups noted the lack of needed utilities (especially in the outlying areas) and high speed Internet. They noted the congestion of several roadways and the lack of a comprehensive plan to update and improve the area's transportation, including another bridge over the Cape Fear River.
- Participants noted that, while the port is an asset, its size and location means that it is a "niche" port. They also noted the need to make improvements along the river if the port is to be used to its full potential. While participants also noted the high level of connectivity at Wilmington International Airport (ILM) given the market it serves, they noted that pricing at ILM could be improved.
- Several of the focus groups noted that there are few large parcels of developable land left in the County or City. They also noted that lack of water and sewer infrastructure, as well as storm water, can be an issue.
- When asked specifically about the area's support of the entrepreneurial community, participants noted the dearth of venture capital available, despite a large concentration of wealthy retirees. Participants suggested that the various resources that are available are poorly communicated, but complimented the creation of the Center for Innovation and Entrepreneurship (CIE).
- On a broader level (as noted above), several groups noted a community-wide vision or strategic plan and a commitment to its implementation as one of the area's greatest needs. They argued that without such guidance or consensus, individual

organizations are left to their own devices, are siloed, and/or have the tendency to compete rather than cooperate. A few groups noted that several attempts have been made to create such a plan, but that "Wilmington does what DC has done—pick sides and then don't discuss it." (In reference to the Federal government shutdown that occurred in October 2013).

Companies to Attract/Best Practices to Follow

- When asked what types of businesses or industry would be a good fit for the region, participants first noted that there is much debate and disagreement on the topic. They noted the clear divide between those who want to protect the natural environment at all costs versus those that call for a diversity in the area's economic base (including industrial or manufacturing targets). Despite the debate, however, participants do not feel that either the City or the County has articulated what their targeted industries are.
- Participants suggested that several industries would be a good fit for New Hanover County and Wilmington, including: manufacturing (light and heavy), biotechnology, marine biology, IT, pharmaceuticals, healthcare, aerospace, energy companies (both traditional and renewable), more film industry companies, and corporate headquarters.
- Participants were asked to name initiatives or best practices they have encountered in other areas that could be applicable to the area to help increase its competitiveness. The examples cited include (in no order): cities in Oregon (for their walkability and cycling friendly nature); the Hampton Roads area (for its regional economic development partnership); Durham (for sparking entrepreneurship, being home to the Council for Entrepreneurial Development (CED), and reuse of older facilities); Littleton, CO (for its economic gardening model); Charleston, Norfolk, and Savannah (as port cities and for revitalizing and leveraging their historic downtown areas); and Asheville (for taking advantage of its downtown and cultivating arts culture).
- When asked to name innovative initiatives currently in New Hanover/Wilmington, participants noted the establishment of Marine Biotechnology in North Carolina (MARBIONC) and other programs to support and cultivate the area's marine biology strengths, the start of the Center for Innovation and Entrepreneurship at UNCW, and the growth and cultivation of the film industry.

> "There is a lot of good stuff going on in Wilmington, but it isn't well communicated."
>
> —Focus group participant

Economic Development Support

- As a whole, the group was rather negative about the economic development support in the community. Participants noted some improvements in recent years in terms of programming for small business and the availability of certain loan programs. However, they pointed to several instances where services seem lacking or the specific entities did not seem willing to address their needs.
- Organizationally, the participants felt that there is an abundance of economic development entities in the area, but there is confusion as to which does what. They note that none of the groups seem to work in concert with the others and that the effort is rather balkanized. The perception is that they are disjointed and that there is no comprehensive strategy to coordinate all of the activities and identify priorities.
- Nevertheless, participants believe that such an effort is needed and agree with the approach of identifying industries that would be a good fit for the area rather than solely noting what certain groups do not want to have in the area. Once the area agrees to the targets, all of the economic development groups should be aligned to accomplish their particular role as it relates to recruitment or improving the area's product or business climate to support such attraction efforts.

> "Some of the economic development groups have never had their homework assignment changed. Because there is no stated direction or call for change—who can blame them for not evolving?"
>
> —Focus group participant

- Finally, participants noted that strategy sessions or activities to garner input to identify what is needed are not new. All groups noted that the problem is in building consensus and then executing.

Suggested Actions

Focus group participants were asked to describe an initiative that they would enact to boost the area's business climate and counter the above challenges and needs—without regard to money or politics. The following themes/suggestions were the ones most frequently suggested:

- Create a shared vision for economic development for the City and County, set priorities based on that vision and assign roles and responsibilities for implementing it. Once the vision is identified, all members of the community should stand behind it (even if it was not their first choice) and have a unified message as all organizations have a role in selling New Hanover/Wilmington to external parties.
- Find ways to consolidate the City and County government. While improvements have been made to aligning the regulatory environment of the two, more could and should be done.
- As a corollary to the above, participants also noted that the City/County should look beyond its boundaries and look at the larger region—especially when it comes to making the case for companies to move to the area.

- Improve the K-12 education system and create stronger linkages between the schools, higher education institutes, and businesses. The result would be an education system that is uniformly excellent throughout the area and would rival the best in the world.
- Greatly enhance the region's infrastructure and be more proactive than reactive in addressing updates/repairs so that the County and City are not always playing catch up. This would mean focusing on better roadway and bridge infrastructure (including an additional bridge across the river) and planning for a 10-20 year vision. The results would be better leveraging the port and potentially creating passenger rail service to Raleigh and the Triangle region.
- Cultivate true leadership—both within government and among the corporate and business leaders. Many of the negative comments about the area stemmed from the lack of committed and visionary leadership. Participants suggest the need for leaders that stand above the political fray and have enough authority and fortitude to build consensus and ensure that strategies are implemented effectively. Participants also noted the need to get more of the corporate community involved and invested in the area's future. While each has done so to some degree, the recommendation is that the business community come together and find areas of consensus. Once that consensus is defined, they should speak as one voice to the local and state government to ensure that the needed changes and/or improvements are made.

Responses to Questions

The following table summarizes the responses to specific questions posed during the focus group. The number in parentheses indicates the number of groups in which the comment was raised. For most questions, all focus groups responded. When not all focus groups responded, the number that did is indicated.

Question	Response
1. What are certain words or phrases that describe New Hanover County, good or bad?	Participants were mostly positive in their description of New Hanover County and Wilmington. Participants were complimentary of the region's quality of life and recreational amenities. While they noted that it is a friendly community with a great university, they also noted a resistance to change and a lack of leadership. The most frequently provided descriptors included: • Beach/coastal (5) • Quality of life (4) • Tourism (3) • Great university (3) • Diverse economy (3) • Historic (3) • Densely populated (3) • Fragmented (3) • Friendly/welcoming (2) • Resistance to change (2) • Lack of leadership—both public and private (2) • Paradise (2) • Opportunity (2) • Port city (2) • Environment (2)

Question	Response
2. What do you think are some of the biggest obstacles that inhibit New Hanover County in its ability to attract, expand, or retain businesses and investment?	Participants noted that the lack of consensus around an economic vision and the unpredictable nature of regulations and policies for development are seriously inhibiting New Hanover County/Wilmington from attracting and retaining businesses. Additionally, participants alluded to a lack of leadership, a narrow job market, transportation infrastructure issues, and a reputation for being anti-industry (as exemplified by the Special Use Permit) as obstacles to attracting investment. • Lack of identity; don't know what we want to be; lack of vision (4) • Regulations/planning process are cumbersome, unpredictable (4) • Poor Industrial infrastructure (4) • Lack of leadership; decision-makers becomes insular in their thinking (3) • Narrow job market; not many opportunities for trailing spouses or young professionals (3) • Reputation for being anti-industry; against large companies (3) • Port infrastructure and river depth (3) • Special use permit (SUP) (3) • Lack of large parcels of land for people to build – residential or industry (3) • Transportation – small airport. Lack of rail – passenger; bus service cut back (3)
3. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of New Hanover County? The City of Wilmington?	As noted above, when asked to rank the business climate for New Hanover County and the City of Wilmington on a scale of 1 to 5 (with 5 being the highest), participants as a whole gave both jurisdictions "below average" scores. On average, New Hanover County was scored higher than Wilmington (2.70 versus 2.58). When asked for the rationale of their scores, participants most often noted that both the City and County tended to be reactive and do not have a vision for the area's growth. The permitting process and local regulations (especially the Special Use Permit) are inhibitors to development. On a positive note, participants credited the County and City for aligning their processes better in the last few years (e.g., permitting) and for beginning to be more proactive in some areas (e.g., historic preservation).

Question	Response
4. What do businesses need that they can't find in New Hanover County?	With the exception of comments regarding the aging or inadequate infrastructure in the area, most comments about this question centered on assets that allow New Hanover County/Wilmington to attract, retain, and supply a quality and varied workforce. Specific responses included: • Trained technical workers (e.g. programmers and developers) (6) • Welcoming attitude from those in charge of zoning and permitting (3) • Mid-level executives/professionals (2) • Infrastructure (e.g. utilities) (2) • Jobs for trailing spouses • Inexpensive airport/flight access • Inability to retain employees • Affordable housing—for middle and moderate income workers
5. What do you see as the County's/region's assets?	Similar to the responses given when participants were asked to describe the community, respondents listed the area's locational and recreational assets. Additionally, participants noted the access to higher education (both at the university and community college level), the thriving arts and culture environment, and the airline service out of Wilmington International Airport (given its relatively small size, they appreciated that it has relatively good connectivity) as assets. • Quality of place (4) • Access to outdoor recreation (e.g. beach, river) (4) • Healthcare (4) • Port (4) • Arts/culture (4) • Transportation (e.g. ILM) (4) • Higher education opportunities (4) • Natural environment (3) • Location (2)
6. What assets and attributes of the region do you believe are underutilized in investment attraction?[1]	The majority of the groups believe the area could do a better job of leveraging the University of North Carolina Wilmington and Cape Fear Community College. Participants also believe that there is untapped talent in the region and that the area's arts culture, history, riverfront could be better tapped to support development downtown. Responses most frequently offered include: • University (3) • CFCC (3) • History (3) • Existing talent (2) • Downtown (2) • Arts and cultural assets (2)

[1]The Large Employer group answered this question within another discussion. Only five groups are noted in this tally.

Question	Response
7. What is the County/City doing well and, perhaps, not so well in growing entrepreneurship?	Participants believe that the County and City have many individual resources for entrepreneurs, but that they are not widely communicated and are still nascent. Among the resources and initiatives that currently exist, participants noted the creation of the Center for Innovation and Entrepreneurship (CIE) as very positive. For challenges facing entrepreneurs, the participants noted the limited availability of venture capital, a lack of an association or other networking organization, and no strong linkages to the University of North Carolina Wilmington (with the exception of CIE).
8. How do you see the labor situation in the region, both quantity and quality?	Responses to this question centered on the lack of highly skilled workers as well as the relatively low wage rate in the area. A few participants noted that there is an ample supply of labor in the construction and film industry and that most employees in service industry jobs are overqualified. The most frequently provided responses include: • Difficult to find skilled mechanical labor (3) • Retaining talent is difficult because there is a lack of middle-level jobs (3) • Wage is not competitive with other markets (3) • Characterized by low-wage, part-time service jobs (2) • Quantity and quality excellent (2)
9. Give some examples of local unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the County/City?	While it was noted in other discussions for other questions, the area's film industry was often mentioned as one that is unique (in terms of the infrastructure created and the incentives built). Participants also pointed to the work in marine biotechnology and the efforts to make use of the port, existing industries, and the foreign trade council. Responses given in more than one focus group include: • Film industry – Hollywood East (5) • Marine-Biotech Cluster (e.g., Marine Bio-Technologies Center of Innovation (MBCOI), MARBIONC) (4) • Port (2) • Foreign trade zone (2) • GE and the work they are doing in New Hanover County (2)
10. Are there programs in peer/competitor communities that the County should consider for this area?	When asked to name initiatives or best practices in other areas that could be applicable to New Hanover County, participants noted cities or areas that have done a good job of either redeveloping their downtown as a destination or feature to draw visitors and add to the quality of place as well as areas that have provided a strong infrastructure for entrepreneurial and innovative pursuits. The most frequently cited examples were Charleston, SC and Savannah, GA. Participants also mentioned regions that appear to have strong regional economic development programs.

Question	Response
11. What infrastructure is missing or unsatisfactory in the County (soft and hard infrastructure)?	The most frequently provided response was the lack of needed utilities in the outlying areas of the region and the lack of consistent, high-speed Internet service. Several participants noted that passenger rail service to the Triangle would be helpful, as well as more bike and pedestrian paths. Participants also noted the aging roadways and road network in the area as well as another bridge over the Cape Fear River. Responses included: • Water and sewer (5) • Alternatives for crossing the river (4) • Passenger rail to Triangle (3) • High speed Internet (3) • Roads (e.g., Market Street) (3) • Bike paths/pedestrian paths (3) • Additional flights (2) • Improved port (2)
12. Without regard to money or politics, what would you work to change about the region?	Participants suggested initiatives that would encourage growth and activity in New Hanover County/Wilmington as well as strengthen the workforce pipeline and enhance the attraction and appeal of the area. Also noted were the need for leadership and an economic vision, as well as the tools and organization to help execute the vision. The responses most frequently offered include: • Develop Downtown (big change, not small) (5) • Improve public safety, appeal of living in County/City (5) • Area where they can create a culture for the millennial group—work, play, create startups (4) • Balanced economic system; Employment for everyone (4) • Leadership and vision (3) • Double down investment in education (K-12); raise teacher salaries 50%; build best system in state and country—would be able to attract anyone in an integrated school system (3) • Open and honest/cooperative dialogue among business/government and environmental community (2) • Merge the City and County and have one consolidated government (2) • Better transportation (public and road infrastructure) (2) • Need a baseball team here (2) • Port expansion (2)

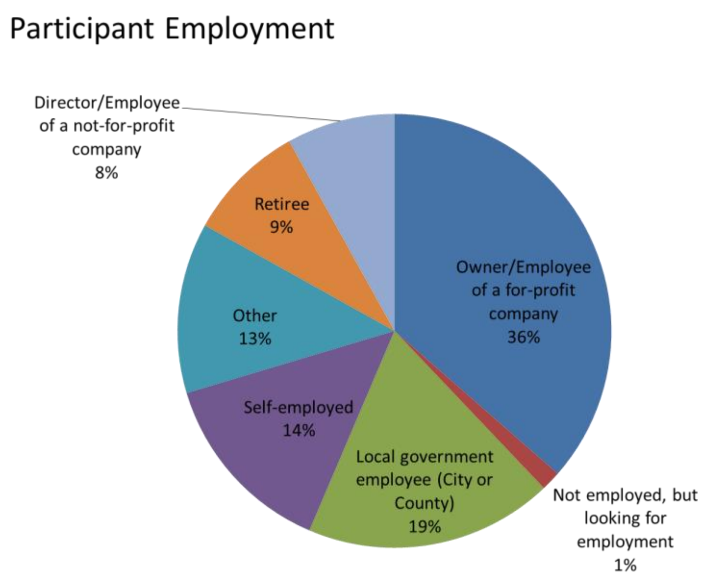
Question	Response
13. What types of companies do you think would be a good fit for the County?	Participants named a range of industries and types of companies that they believe would be a good fit for the region. Most suggested building upon existing strengths, the ports, and the research being conducted by the University of North Carolina Wilmington. Most groups also noted that no current consensus exists—or if one does, they are unaware of it. Responses that were offered in more than one focus group include: • Manufacturing (4) • Biotech (3) • IT (3) • Pharma (3) • Healthcare (2) • Green (2) • Aerospace (2) • Energy - both traditional and renewable (2) • Film industry (2) • Ecotourism (2) • Corporate HQ (2) • Mobile creative/professionals (2)
14. What are your past experiences with, and current perceptions of, the various local economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved?	Responses to this question centered on the need for more collaboration, communication, and potential consolidation among the various groups. Many participants noted that there are so many organizations that efforts often appear fragmented. Participants noted both good and bad working relationships with the County and City economic development entities as well as with the Chamber and other business associations. In general, they noted that the groups need to work with the governing leadership bodies in order to build a consensus around what industries the community wants/needs and then ensure that all work toward it. Some participants also noted that more needs to be done to support entrepreneurs and to advocate for the area's needs in Raleigh.
15. Are there any other issues of concern to you that we did not ask?	Participants noted that there are a few underlying issues that are implicit in the discussions that took place but that need to be dealt with in some manner when considering the area's economic future. In particular, participants suggested that future plans need to account for expected population growth (the region is expected to grow to 250,000 people in the next 20 years), the likelihood of increasing coastal insurance, and the need to get the private sector more engaged in building the vision for the community.

Electronic Survey Results

As noted above, an electronic survey was created using the focus group feedback to test and validate some of the key themes and issues raised by the focus groups. The list of options for the closed-ended questions for the survey was created from input received during the focus groups. For many of the questions, respondents were also given the opportunity to leave additional comments.

Of specific interest within the survey results was whether the broader group of stakeholders agreed with the focus group participants in terms of the inhibitors to further business and capital investment in the area, the area's workforce, and the desired economic future for New Hanover County and Wilmington.

FIGURE 2



A website link to the survey was posted on the County and City websites and was also distributed by 12 partner organizations. A total of 897 unique survey responses were submitted.[2] The respondents represented a broad group of residents. The survey respondents self-selected to participate in the survey (as opposed to focus group respondents, who were invited). Slightly more than one-third of the respondents are owners or employees at area for-profit companies and approximately one-fifth work for a local government. A full breakdown of the participants' employment status is shown in Figure 2. As would be expected, the comments from the survey participants tended to be more candid and direct in their praise or concern of the area.

> "Wilmington is just small enough to still be the perfect 'southern' city but large enough to still be progressive. Part of the appeal is that people can live or come here and feel like they have found something serene and somewhat untouched. The feeling is special."
>
> —Survey comment

[2] Twelve partner organizations and the City and County distributed the link to the survey. There were 904 total respondents who completed the survey. Ten surveys contained verbatim open-ended responses (one set of seven and two sets of two) that strongly suggest that the same person completed these surveys. Only the first of these responses for the three instances was included in the calculations.

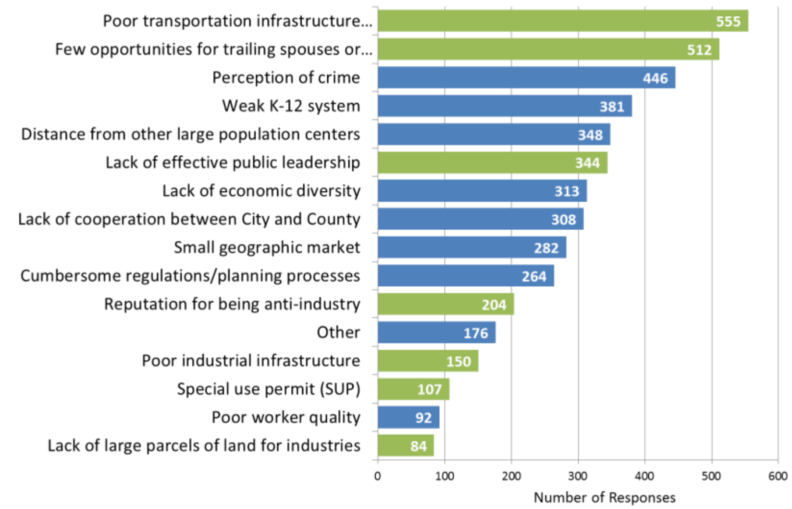
Strengths and Challenges

As with the focus groups, a number of trends emerged from the survey responses that reiterated the area’s recreational amenities and quality of place as key strengths. Like the focus group participants, survey respondents were highly complimentary of the area’s quality of place—especially in terms of its physical assets (e.g., beaches and recreational activities) as well as its emergence as an arts and culture hub.

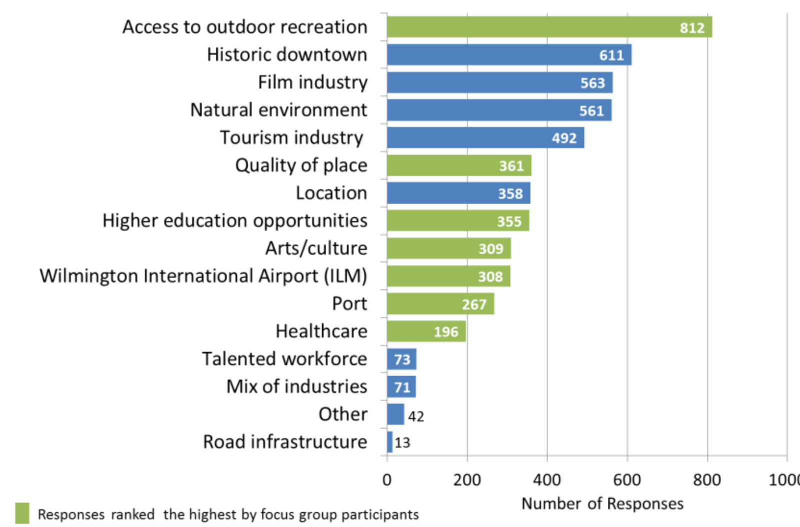
Survey respondents also echoed the deteriorating state or lack of key infrastructure in the area (e.g., roads, bridges), a lack of effective public leadership, narrow job market, Special Use Permit, and a general perception of being anti-industry as key detractors for increased investment in the region. However, the survey respondents were more concerned than focus group respondents regarding the K-12 public school system, the lack of economic diversity, and a perceived lack of cooperation between the City and the County.

The differences in perceptions between the focus groups and the survey respondents regarding the area’s challenges were even more pronounced in the “other” comments section of the survey. When asked for “other” comments pertaining to the question of the major factors inhibiting more investment in New Hanover County/Wilmington, survey respondents were much more vocal about the existence of heavy industry (the Titan facility was often noted) and perceived lax environmental controls. Several comments also suggested that crime is a larger concern than the focus group comments reflected.

What do you think are some of the biggest obstacles to attracting, expanding, or retaining businesses and investment?



What do you see as the area's strengths?



Respondents were invited to choose up to five responses.

Vision and Goals

Like the focus group participants, survey respondents believe that the area suffers from a lack of a long-term vision for its economic future. They also cite a lack of effective public leadership and the lack of a regional economic development plan.

Based on the focus group responses, survey respondents were given a list of initiatives the City and County leadership could take on that would improve the area's competitive position to attract and retain quality companies and talent, if initiated. The survey respondents' responses reflect the concerns about quality of place and product improvement noted in other sections of this summary. The top five responses focused on quality of place issues rather than specific, traditional, economic development strategies. Specifically, the top five responses ranked by survey respondents were:

- Build the best public school system in the state and country by doubling investment education (K-12) and substantially raising teacher salaries
- Improve public safety and increase the appeal of the County/City as a place to live and play
- Build a better transportation system throughout the County (public and road infrastructure)
- Transform Downtown in a way that rivals Savannah or Charleston so that it is a regional destination and draws activity to the area
- Ensure New Hanover County and Wilmington have a balanced economy that provides employment opportunities for everyone

Figure 3 summarizes how respondents ranked the above.

Figure 3: Ranking of Initiatives

Initiative	% Ranking initiative 1	% Ranking initiative 2	% Ranking initiative 3	% Ranking initiative 4	% Ranking initiative 5
Build the best public school system in the state and country by doubling investment in education (K-12) and substantially raising teacher salaries	25.4	15.7	8.6	7.0	8.3
Improve public safety and increase the appeal of the County/City as a place to live and play	10.3	15.0	12.6	12.0	8.6
Transform Downtown in a way that rivals Savannah or Charleston so that it is a regional destination and draws activity to the area	9.7	10.3	12.3	12.6	10.9
Build a better transportation system throughout the County (public and road infrastructure)	9.7	9.8	14.5	11.2	8.9
Create a strategic plan to build a diversity of industries in New Hanover County/Wilmington so that economic development is approached from a balanced perspective (mix of manufacturing, office, tourism, etc.)	8.3	10.4	8.3	9.5	8.9
Ensure New Hanover County/Wilmington have a balanced economy that provides everyone employment opportunities	8.3	9.5	11.2	9.1	9.4
Merge the City into the County and have one consolidated government	7.9	5.3	6.2	4.2	8.3
Find, recruit, or nurture a new generation of public leaders that are focused on running the City/County effectively and in a way that supports economic opportunity for its citizens	7.4	6.8	6.7	8.8	8.6
Create a regional economic development perspective; leverage assets/synergies with Pender and Brunswick Counties	5.9	6.7	7.0	8.3	8.2
Create an incentive fund to attract companies	3.2	3.8	3.5	5.1	5.1
Provide high-speed fiber to all homes and businesses	1.5	2.4	3.2	6.4	6.1
Eliminate or lessen the restrictions of the Special Use Permit (SUP)	1.4	1.5	1.8	0.8	2.9
Expand the port and deepen the river to accommodate more traffic	1.1	2.7	4.2	5.1	5.7

Highest ranked initiative | 2nd Highest ranked initiative | 3rd Highest ranked initiative | 4th Highest ranked initiative | 5th Highest ranked initiative

Survey respondents were asked to choose the top five initiatives they believe would improve the competitive position of New Hanover County and Wilmington if implemented.

Desired Industry Sectors

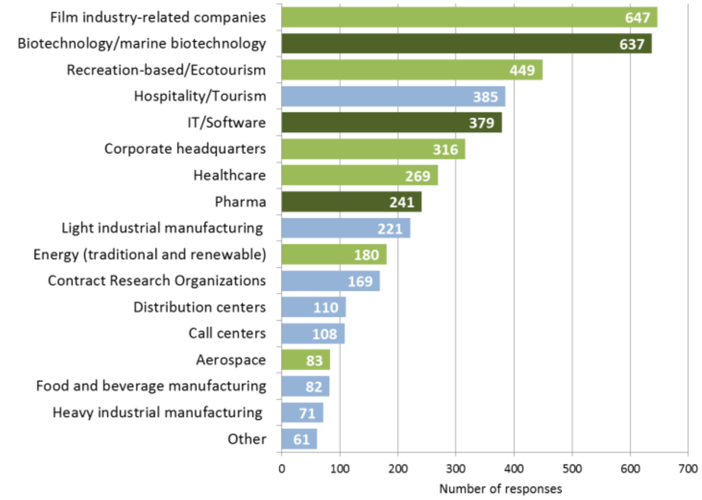
The focus group respondents and survey respondents were aligned in terms of their top choices for industries that the area should attract. Survey respondents agreed that companies in film, biotechnology, IT, and pharma would be good targets, as well as those in the film industry, ecotourism, and healthcare. While renewable energy scored highly among both groups, support for that industry was especially pronounced in the "other" comments section to the question.

Infrastructure

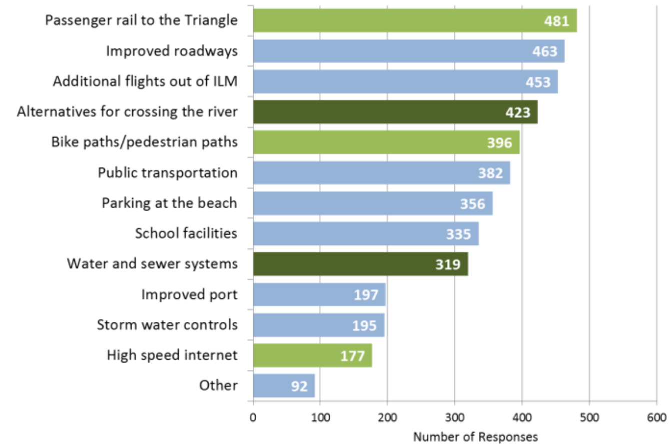
Survey respondents agreed that the area's physical infrastructure is in need of upgrading and repair. Similar to the focus group respondents, survey participants believe that another river crossing is much needed, as well as upgrades to the water and sewer system. The second highest-ranking responses given by both groups included passenger rail to the Triangle and more bicycle paths.

> "Collectively, we don't know what we want, so we don't do a good job recruiting. The minority is so loud that they often win."
>
> —Focus Group Participant

What types of companies do you think would be a good fit for the area?



What hard or soft infrastructure is weak or missing in New Hanover County/Wilmington?



Top responses ranked highly by focus group participants; focus group respondents ranked manufacturing highly also, but did not specify what type.

Second highest ranking responses by focus group participants

Other survey responses

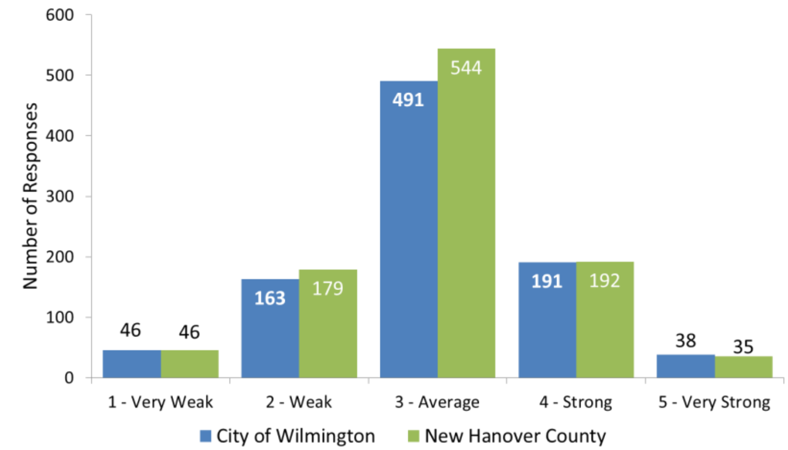
Respondents were invited to choose up to four responses.

Business Climate and Economic Development Response

Survey respondents ranked the County and City fairly evenly in terms of business climate, with the majority believing that the climate is average. Respondents were also asked whether they would recommend the New Hanover County/Wilmington area to companies looking to relocate to another area. The support was somewhat weak: for the New Hanover County/Wilmington area, survey respondents' net promoter score (or the percent of promoters minus the percent of detractors) was negative 13.7 (A neutral rating would be zero; a negative net promoter score suggests weak support).

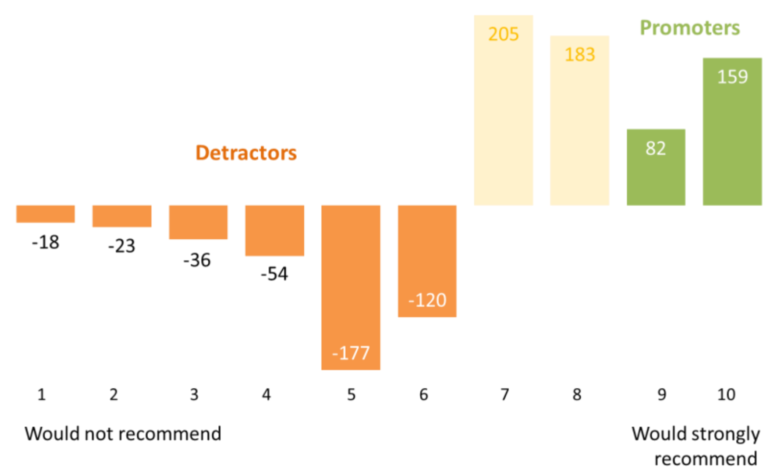
Many of the "other" comments suggest that part of the reason for the low scores is a belief that the economic development approach in the City and County is disjointed and focuses too much attention on attraction (rather than retention and expansion). Furthermore, the respondents pointed to a lack of vision and leadership.

On a scale of 1-5, with 5 being "Very Strong," how would you rate the business climate of different jurisdictions?*



* Business climate is defined as those policies and laws enacted by the specific governing body that impact local businesses

How likely would you be to recommend the New Hanover County/Wilmington area as a place to do business?



Chapter 2: Assets and Challenges Assessment

New Hanover County (NHC) offers a unique mix of assets for businesses that are contemplating relocation or expansion. Our approach in conducting the Assets and Challenges Assessment (A&C) is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding its assets and challenges from a location strategy perspective, we believe that the County will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding the County's strengths and opportunities, the County will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets.

Garner Economics analyzed 63 community and regional factors as part of the assessment. Ratings were identified by evaluating the County's position for each of the factors against the State of North Carolina, the United States, and in many instances, the benchmarked counties of Mobile, AL and Greenville, SC.

We define a Neutral rating as normal in the realm of economic development opportunity and competitiveness. An Asset rating indicates a positive feature of the County that would be evaluated and rated as a competitive strength versus the benchmark locations. A Challenge rating identifies a factor that is considered as a relative deficiency compared to other locations, which should be addressed with future remediation and may be an impediment to economic development if not resolved over time.

Of the 63 variables analyzed, 23 are considered an Asset and 23 a Challenge (17 rated as Neutral). While the County has a significant number of advantages, the combined number of Challenges and Neutral scores indicates that there are many areas in which the County needs to mitigate its weaknesses and highlights items that County leaders could pursue to further differentiate and enhance the economic vitality of the County.

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data to gain a more complete understanding in those areas of interest in the full report.

REPORT DASHBOARD

Indicates the County is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.

Indicates the County is neutral, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.

Indicates the County is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

Access to Markets

New Hanover County, NC (NHC) is within 650 miles (or a day's drive) of a US population of nearly 144 million people. Foreign Trade Zone #66, located at the Port of Wilmington, serves the region. The port has a channel depth of 42 feet. Although it is considered a deepwater port, its depth will limit larger vessels that need a deeper draft from entering the channel. Broadband availability is widespread throughout the County, either through DSL or cable; however, broadband speeds are ranked as slower than the noted benchmarks. With the Atlantic Ocean serving as the eastern border of the County, the area has limited potential as a national distribution center.

Access To Markets	Rating
Centrally located for major regional market	[1]
Centrally located for national market	[2]
Well positioned to serve international markets	[3]
Interstate highways	[4]
Rail service	[5]
Port facilities (water or inland)	[6]
Within 1 hour of commercial air passenger service	[7]
Broadband speeds and availability	[8]

Labor

Many focus group respondents expressed concern about the availability of skilled industrial and technical workers. This is confirmed based on a labor analysis conducted by Garner Economics that validates fewer than 5,000 industrial workers in New Hanover and a location quotient (LQ) of 0.73 (far below the national average). The availability of managerial personnel is also a challenge with a LQ of 0.78, or 6,988 employed in that occupational classification. The availability of technicians and scientists is considered an asset with 1,356 people employed in life sciences and a LQ of 1.23. Cost of labor is also considered an asset with New Hanover's average weekly wage of $738 being below each benchmarked geography.

The level of unionization, availability of vocational training, on-the-job training assistance, and the presence of a major university are all considered strong assets.

Labor	Rating
Availability of skilled industrial workers	[9]
Availability of skilled clerical workers	[10]
Availability of technicians and scientists	[11]
Availability of managerial personnel	[12]
Cost of labor	[13]
Level of local unionization	[14]
Availability of post-secondary vocational training	[15]
Availability of on-the-job training assistance	[16]
Within $^{1}/_{2}$ hour of major university/college	[17]
Availability of engineering program	[18]

Access to Resources for Industrial Development

Of the four variables being measured (availability of forest products, Ag products for food processing, manufacturing processes/percent of the total workforce in manufacturing, and cost of electricity for industrial use) all are rated as a challenge. New Hanover ranks 95 out of 100 North Carolina counties in the value of timber harvested. NHC also ranks 95 out of 100 counties in the value of Ag products (cash receipts). At 5%, the workforce engaged in manufacturing is significantly below all of the benchmarked geographies, and the cost of electricity (Duke NC) is higher than the benchmarks of Mobile, AL and Greenville, SC.

Access to Resources for Industrial Development	Rating
Availability of forest products	⬇ [19]
Availability of agricultural products and/or commercial fisheries for food processing	⬇ [20]
Availability of manufacturing processes/percent of workforce in manufacturing	⬇ [21]
Cost of electricity for industrial use	⬇ [22]

Local Economic Development Program

As it relates to the purposes of this report and strategy, Wilmington Business Development, Inc. (WBD) is being used as our benchmarked EDO since both the City and County contract with the WBD to serve as the lead facilitator for the more traditional economic development services. WBD lists a full-time staff of four and an annual budget of approximately $1 million, which we consider a neutral for the size of NHC. The WBD has a good blend of public and private leaders representing CEO-level participation. However, based on feedback from focus groups participants and the observations of Garner Economics, cooperation between the many different organizations that are involved in economic development is suspect, and the level and understanding of how public policy drives economic development (either positively or negatively) is not well understood as evidenced by the dialogue and current position of the County's Special Use Permit (SUP) ordinance.

Local Economic Development Program	Rating
Adequate level of professional staff (WBD)	
Involvement of both public and private sectors	
Level of leadership support of economic development program	
Level of cooperation between various organizations involved in economic development activity	[23]
Level of awareness of community regarding economic development	[24]
Level of funding for local economic development program	[25]

Access to Space

A significant detriment to New Hanover's ability to attract and, perhaps, retain industrial investment is its lack of fully served industrial sites. A site is defined as a parcel of property for sale or lease with a published price, and with the entire necessary infrastructure in place with the size and capacities that would attract the appropriate investment. Most of the properties designated as either I-1 or I-2 in NHC do not have water and or sewer infrastructure to place, making it nothing more than raw, unusable land. Most companies today would require being connected to a municipal water and wastewater system. Only the availability of office space and office sites is considered a neutral in NHC, with WBD listing 150,000 sq. ft. of class A or B space on its website.

Access to Space	Rating
Availability of fully served and attractive industrial sites	[26]
Reasonably priced sites	
Availability of suitable industrial and warehouse space (buildings)	[27]
Availability of suitable office space and office sites	[28]

Access to Capital

Like many places throughout the United States, the availability of capital for startup, early stage, or traditional small businesses can be challenging, depending on the resources within the community. NHC offers small business loans from the US SBA 504 loan program administered by WBD. NHC also has two groups involved in angel investing: the IMAF Cape Fear and Wilmington Investor Network. IMAF Cape Fear claims to have made 12 investments in local companies over the last few years. Though the use of industrial revenue bonds is permitted in NC, they are not widely used since ad valorem tax emptions are not permitted in the state.

Access to Capital	Rating
Availability of tax-exempt financing for new industrial facilities	
Availability of low-interest loans for small business	[29]
Availability of angel or venture capital from local sources for <u>local</u> business startups	[30]

Government Impact on Business

Water and sewer capacity is an asset based on data received from the Cape Fear Public Utility Authority (CFPUA). Total available wastewater capacity: 1.8 MGD (plans to be increased to 7.8 MGD within the year). Total available water capacity: 25.1 MGD. Total wastewater capacity: 22.1 MGD (plans to be increased to 28.1 MGD within the year). Total water capacity: 42.0 MGD.

North Carolina has a strong labor-training program and, in conjunction with Cape Fear Community College, end-users (the companies that are using the training programs offered) give the efforts high marks. Additionally, both CFCC and UNC Wilmington receive positive comments from participants in the focus groups and from many respondents of the electronic survey noted in Chapter 1.

Challenges include high local sales tax as compared to the benchmarked communities of Mobile and Greenville; a weak statewide business climate as ranked by the Tax Foudation.org; permitting and zoning policies that have a "culture of no" for industrial development as evidenced by the Special Use Permit and its permitting process and its list of companies that are or are not permitted; the lack of local and state incentives that allow NHC to compete with locations in SC, GA, TN, and AL compared to their incentive offerings; and the lack of water and sewer infrastructure to areas that are zoned I-1 and I-2 (WBD has an inventory of available sites for industrial development on its website totaling 642 acres. Many of these sites do not meet the definition of a site as noted under the section of Access to Space since it has no infrastructure to the site).

GOVERNMENT IMPACT ON BUSINESS	RATING
Availability of water and wastewater availability and capacity	↑ [31]
Availability of adequate water and sewer lines to industrial sites	↓
Condition and maintenance of local streets	=
Level of traffic-carrying capacity of local streets and highways	↓
Availability of local tax incentives	↓ [32]
Availability of state or local labor training incentives	↑ [33]
Local SAT scores	↑ [34]
Quality of post-secondary education	↑ [35]
Local business permitting procedures and costs	↓ [36]
Zoning policies	↓ [37]
State business tax climate index (by the Tax Foundation.Org)	↓ [38]
Local property taxes	= [39]
State and local sales	↓ [40]

Quality of Place

The availability of executive-level and moderate-cost housing is considered an asset. According to Zillow.com, there are 662 available properties in NHC in excess of $400,000. As it relates to mid-level-cost housing, Zillow also shows 2,367 properties available within the price range of $100,000 - $399,999. NHC is rich in its cultural and recreational amenities. Wilmington is considered one of the best arts towns in the United States, for both performing and visual arts, with more than 40 different organizations that provide some form of cultural experience. The City and County are both attractive, with a vibrant central business district, a wide range and diverse selection of first-class restaurants, and quality medical care with a higher ratio of physicians per capita than the US average.

The only significant challenge is the threat of natural disasters, primarily related to tropical storms and hurricanes.

Quality of Place	Rating
Availability of executive-level housing	↑ [41]
Availability of moderate-cost housing	↑ [42]
Availability of apartments	= [43]
Cost-of-living index	= [44]
Level of crime	= [45]
Level of cultural activity	↑ [46]
Availability of diverse recreational opportunities	↑
Level of air pollution	↑ [47]
Climate and natural disaster data related to risk	↓ [48]
Attractiveness of the physical environment	↑
General appearance of the community	↑
Availability of major shopping facilities	=
Availability of medical care	↑ [49]
Quality of local restaurants	↑
Appearance of the Central Business District (ILM)	↑

The following endnotes support the rankings offered in the Assets and Challenges Assessment.

[1] New Hanover County is within 650 miles of 143,751,367 of the people that make up the US population
[2] New Hanover has a land-based distribution network of 180 degrees, since the Atlantic Ocean borders its eastern boundary.
[3] FTZ #66 designated at the Port of Wilmington
[4] I-40 runs E/W and begins/ends in ILM. I-95 (N/S) is approximately one hour west of ILM. I-73/74 (under construction) will connect to the upper Midwest and is a 30-minute drive from ILM. The benchmarks of Mobile and Greenville both have two interstates each.
[5] CSX Transportation provides daily service for boxcar, tanker, and general cargo services.
[6] Port of Wilmington: 26 miles from the open sea on the Cape Fear River; Channel depth is 42 ft.; Nine berths with 6,768 ft. of wharf frontage;
[7] **Airport Statistics***

	Passengers Departure	Rank	Scheduled Flights	Rank	Freight Mail (lb.)	Rank	Scheduled Carriers
Wilmington International (ILM)	381,000	129	7,701	137	3,525,000	174	12
Greenville-Spartanburg International (GSP)	916,000	87	18,063	88	59,000,000	86	17
Mobile Regional (MOB)	285,000	153	6,764	155	159,000	442	6

**U.S. flights only, 12 months ending July 2013, rank among 817 US airports*
Source: US Department of Transportation

[8] **Broadband Availability & Speed 2012**
Highest relative percentages shaded.

	New Hanover	Mobile	Greenville	North Carolina	Nationwide
Availability					
DSL	94.4%	91.1%	96.0%	88.6%	89.7%
Cable	99.9%	89.9%	99.0%	90.5%	88.6%
Speed: megabytes per second (Mbps)					
Medium & Large Businesses					
Median Download	6.35	4.58	6.33	9.44	8.83
Median Upload	1.58	2.32	3.12	6.53	4.19
Small Business					
Median Download	1.29	2.54	2.59	3.76	4.30
Median Upload	0.34	1.22	1.29	0.87	1.25

Source: National Telecommunications and Information Administration

[9] 4,977 people employed in mfg. with an LQ of 0.73. An LQ higher than 1.20 is considered highly specialized and positive
[10] 17,100 employed in office and administrative support with an LQ of 0.97
[11] 1,356 employed in Life Sciences with an LQ of 1.23
[12] 6,988 people employed in management but with a Location Quotient (LQ) of 0.78.
[13] **Average Weekly Wage 2013 2Q**

	2013	5 Year	10 Year
New Hanover	$738	7.6%	29.7%
Greenville	$796	8.2%	26.8%
Mobile	$804	13.9%	40.1%
North Carolina	$808	9.8%	30.1%
United States	$921	9.5%	31.2%

Source: Bureau of Labor Statistics

[14] **Unionization Rates (%)**

*2004**

	Private	**Public**
Wilmington	1.7%	7.2%
Mobile	6.2%	16.5%
Greenville-Spartanburg	2.8%	12.4%
North Carolina	2.2%	10.8%
United States	8.6%	40.7%

Source: © 2013 by Barry T. Hirsch and David A. Macpherson

[15] CFCC

[16] State of NC provides training assistance for qualified companies

[17] UNCW

[18] UNCW has a 2+2 transfer engineering degree program with NCSU. But the final two years must be completed at NCSU, and the degree is conferred by NCSU. http://uncw.edu/preeng/

[19] NHC ranks 95th in the value of timber of harvested
http://www.ces.ncsu.edu/nreos/forest/pdf/income07.pdf

[20] Ranks 95 out of 100 NC counties for cash receipts of ag crops
http://www.ncagr.gov/stats/2007AgStat/NewHanoverNorthampton.pdf
From 1997 to 2002 the percentage of the workforce that are commercial fishermen dropped from .48% to .34%. The average commercial fisherman in New Hanover County makes approximately $^{1}/_{3}$ the annual salary of all workers in the County.
http://www.ncfisheries.net/download/socioeconomicWORKSHOP.pdf

[21] **Percent Total Employment Manufacturing, 2012 Annual**

New Hanover	5.7%
Greenville	11.9%
Mobile	10.9%
North Carolina	11.3%
United States	9.0%

Source: US Bureau of Labor Statistics

There are 198 manufacturing establishments in the County.

[22] Higher kWh charge for industrial use than the benchmarks of Greenville, SC and Mobile, AL.
http://www.alabamapower.com/business/pricing-rates/pdf/LPME.pdf
http://www.duke-energy.com/pdfs/ncschedulei.pdf
http://www.duke-energy.com/pdfs/scschedulei.pdf

[23] Based on feedback heard from focus group participants

[24] Based on observations from Garner Economics and from responses from both the focus groups and electronic survey respondents

[25] WBD annual budget is $1mm

[26] The WBD website lists 642 acres of sites available for industrial use. However, many of these sites (and the related acreage) do not meet the definition of a true industrial site with all utility infrastructure in place and with a published sale or lease price.

[27] WBD has two listings on its list of available buildings for industrial use. There are 9 listings for use as a warehouse. Most of the inventory is substandard for today's needs by most clients.

[28] WBD lists office properties of class A or B with total space of 150,000 sq. ft. +/-

[29] WBD is the administrator for the local SBA 504 loan program
http://www.wilmingtonbusinessdevelopment.com/how-we-can-help/sba-504-loan-program/

[30] According to the UNCW CIE: Wilmington Investor Network, IMAF Cape Fear: both have limited portfolio investments in NHC. However, the IMAF notes that they have participated in 12 local investments in the past few years.

[31] From CFPUA: Total available wastewater capacity: **1.8 MGD (Planned to be increased to ~ 7.8 MGD within the year)**
Total available water capacity: **25.1 MGD**
Total wastewater capacity: **22.1 MGD (Planned to be increased to 28.1 MGD within the year)**
Total water capacity: **42.0 MGD**

[32] Subjective with no uniform policy. Negotiations are at the discretion of WBD, County Commission, etc.

[33] State of NC, CFCC both receive high marks from users of the State Workforce Development Network

[34] **2013 SAT Scores***

	Math	Critical Reading	Writing	Composite
New Hanover	526	516	494	1536
Greenville	492	496	474	1462
North Carolina	506	495	478	1479
United States	514	496	488	1498

The Alabama Department of Education does not publish SAT scores.
Source: North Carolina Department Of Public Instruction, South Carolina Department of Education

[35] CFCC and UNCW received many positive comments from focus groups and survey respondents

[36] Many of the focus groups respondents were very critical of the City of Wilmington's and New Hanover County's permitting process, costs, and the customer service provided by the two entities. Specific comments were used to show inconsistencies of implementation by the various governmental entities staffs

[37] New Hanover requires a Special Use Permit for those projects in an industrial classification of A1, I1, and I2. As currently structured, the process is onerous and is a significant impediment to limiting any industrial investment of any consequence.

[38] Ranks 44th in the United States out of 50 states http://taxfoundation.org/sites/taxfoundation.org/files/docs/2014%20State%20Business%20Tax%20Climate%20Index.png

[39] http://www.ncacc.org/index.aspx?nid=193

[40] Higher sales tax collected (state and local) than the benchmarks of Mobile and Greenville

Tax Jurisdiction	Sales Tax
North Carolina State Sales Tax	4.75%
New Hanover County Sales Tax	2.25%
City Sales Tax	*N/A*
Special Sales Tax	*N/A*
Combined Sales Tax	**7.00%**

[41] 662 available properties in excess of $400K, according to Zillow.com, 12/9/2013

[42] 2,367 available properties from $100,000 to $399,999, according to Zillow.com, 12/9/2013

[43] 274 available rentals according to Zillow.com, 12/9/2013

[44] **Cost-of-Living Index 2012 Q2 - 2013 Q2**

	Composite	Grocery	Housing	Utilities	Trans-portation	Health Care	Misc.
Wilmington	98.0	103.9	83.1	108.4	98.7	98.9	104.4
Greenville	92.0	96.9	73.8	94.9	95.5	101.3	101.7
Mobile	91.5	94.2	79.4	107.8	93.9	87.2	95.1

Source: ACCRA

[45] **2012 Crime Rate***
Per 100,000

	Violent	Property
County		
New Hanover	561.2	5448.2
Greenville	607.0	4506.7
Mobile	651.6	4911.2
Metros		
Wilmington	368.5	3830.1
Greenville	570.5	3918.5
Mobile	552.1	4298.8
North Carolina	353.4	3369.5
United States Total	386.9	2859.2

*The FBI does not calculate county-level rates because of multiple agency reporting complications; NC Department of Justice does report county- level rates for New Hanover County at 408.4 for Violent Crimes and 4399.1 for Property Crimes.
Source: Federal Bureau of Investigation

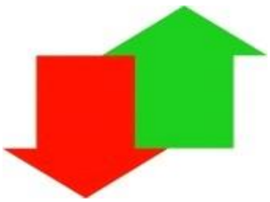
[46] Ranked as one of the best small arts towns in the United States http://www.wilmingtonbusinessdevelopment.com/why-we-are-here/arts-and-culture/

[47] Attainment designation by the US EPA, as is Mobile and Greenville

[48] http://www.hurricanecity.com/city/wilmington.htm

[49] There are 350 physicians per 100,000 population in New Hanover County, NC. The US average is 261. Sperling's 2013

CHAPTER 3: DASHBOARD INDICATORS SUMMARY



The following analysis examines the economic position and competitiveness of the New Hanover County, NC economy. Besides the nation and state of North Carolina, this report also compares New Hanover to two benchmark communities: Greenville County in South Carolina and Mobile County in Alabama.

For several variables, only data at the Metropolitan Statistical Area or *metro* level is available. In those cases the *Wilmington NC* metro is used for New Hanover, the *Greenville-Spartanburg-Anderson SC* metro (shortened to *Greenville* in the report) for Greenville County, and the *Mobile AL* metro (shortened to *Mobile* in the report) for Mobile County. In early 2013, metro delineations changed for two metros: Wilmington lost Brunswick County and Greenville added Anderson County. Unless specifically noted, this analysis uses the current metro delineations.

This analysis relies heavily on raw objective data collected by impartial governmental or impartial third-party agencies. In all cases, the original and most current available data as of December 2013 is used. Garner Economics conducted all unique calculations and computations from the original data and will gladly share methodology with clients upon request.

Demographic & Labor Dynamics	
	New Hanover has experienced a population increase of 24.4 percent or 41,087 more residents over the last decade; the rate is above the nation, state, and both benchmark communities
	New Hanover has grown at an average annual rate of 2.2 percent over the last five years; a pace above all examined geographies.
	At 67.7 percent, domestic in-migration has accounted for the majority of New Hanover's net new residents since 2001. Natural growth has contributed 23.4 percent of growth and international growth accounts for the remaining 8.9 percent.
	At 37.6 years, the median age in New Hanover is on par with the state, nation, and Greenville but only slightly above Mobile's 36.7 median.
	New Hanover has a higher relative proportion of residents in ages 20-34 and 65-84.
	At 1.7 percent, unionization among private businesses in the Wilmington metro is well below both benchmark communities, the state and nation. Similarly, the public sector unionization rate at 7.2 percent is lowest among the other geographies examined.

Demographic & Labor Dynamics - continued	
⬆	Measuring crimes in cities and towns, New Hanover has lower violent crime rates than the cities and towns in both benchmark communities.
⊖	Property crime rates are higher in the cities and towns of Hew Hanover than in the benchmarks and may reflect the influence of nonresident tourism activity in the selected municipalities.
⬆	Compared to the state, the nation, and both benchmark communities, New Hanover has a higher relative proportion of residents who have attained an *Associate*, *Bachelor,* or *Graduate* degree.
⊖	New Hanover has higher relative proportions of bachelor's degree attainment in six fields: *Biological, Agricultural, and Environmental Sciences*; *Psychology*; *Social Sciences*; *Literature and Languages*; *Visual and Performing Arts,* and *Communications*.
⬆	At 1536, New Hanover's 2012 SAT composite scores are above the state, the nation, and Greenville. New Hanover had the highest relative SAT scores in all three subject areas
⬆	Measured as completions per 100,000 residents, New Hanover has more per capita *Associate*, *Bachelor,* and *Master's* degree completions in STEM fields than in the two benchmark communities.
⊖	Within STEM fields in New Hanover, the highest number of associate degree completions are in *Engineering & engineering technologies*, the highest number of bachelor degree completions are in *Biological & biomedical sciences*, and the highest number of master degree completions are in *Physical sciences.*
⬆	New Hanover attracts a higher proportion of new residents, ages 25 and older, with the highest level of educational attainment at *Some college or associate's degree* and *Graduate or professional degree.*
⬆	Annually, 13.7 percent of the population ages 15 and over are enrolled in a college or graduate school in New Hanover. The percentage is well above both benchmarked communities, the state, and the nation.
⬆	From 2002 to 2011, the number and proportion of workers who both live and work in New Hanover increased by 2.3 percent or 1,184 more workers. Over the same period, the number of in-commuters increased by 45.1 percent or 12,690 more workers.

Economic Dynamics	
	Over the last ten years, real GDP in the Wilmington metro increased by $2 billion, up 25.6 percent— a rate above the nation, the state, and both benchmark communities.
	Measured in per capita terms, at $37,297in 2012, Wilmington has a lower relative amount of economic activity than the state and nation, but is above both benchmark communities.
	Over the last five years, real per capita GDP in Wilmington declined by $1,034, down 2.7 percent.
	At $738, New Hanover's average weekly wage is 24.8 percent below the nation, 9.5 percent below the state, and below both benchmarks.
	After adjusting for inflation, growth in real values for the average weekly wage in New Hanover has declined by 0.5 percent (-$3) over the last five years.
	New Hanover's per capita income is 16.4 percent below the nation and 0.9 percent below the state. Per capita income is 12.7 percent above Mobile's and 4.2 percent below Greenville's.
	Over the last ten years, growth in real values for the per capita income in New Hanover has declined by 0.3 percent (-$99) and, in the last five years, gone down by 6.1 percent (-$1,911).
	As of 2012, the Wilmington metro (old 3-county delineation) had exports totaling $923 million. In per capita terms, at $2,458, Wilmington's exports are below the nation and both benchmark metros.
	Adjusting for inflation, from 2005 to 2012, exports increased 37.4 percent in the Wilmington metro; a rate that is below the nation, the state, and one benchmark metro.
	As of 2012, proprietor income accounted for 13.3 percent of total employment income in New Hanover; a portion above the nation, the state, and both benchmark communities.
	Over the last ten years, proprietor income has increased by 71.9 percent in New Hanover, well outpacing the nation, the state, and both benchmark communities.
	Self-employment accounts for 13.9 percent of all occupations in New Hanover, a proportion well above the nation, the state, and both benchmarks.

Economic Dynamics - continued	
	Over the most recent year, total employment in New Hanover is up, on average, 1.4 percent or 1,370 more jobs. The pace is above both benchmark communities but below the nation and state.
	The recession led to a 7.4 percent job loss in New Hanover (-7,714 jobs), second only to Greenville in severity.
	In New Hanover, the average unemployment rate over the last year has averaged 8.7 percent (representing 9,472 unemployed persons). The average rate is above the nation and both benchmark communities
	At 98.0, the composite Cost-of-Living Index score in the Wilmington metro is below the nationwide index but slightly above both benchmark communities.
	New Hanover places well compared to the benchmark communities in broadband availability but tests lower in broadband speeds available to businesses.

Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors, occupational groups, and industry clusters in New Hanover. This information is not benchmarked to other communities:

- ✓ Over the last five years, the largest absolute employment gains came from *Real Estate* (up 1,169 jobs or 14 percent). Other significant gains were made in *Arts, Entertainment & Recreation* (up 737 jobs or 25 percent) and *Finance and Insurance* (up 562 jobs or 25 percent).
- ✓ The greatest job losses have come from the *Construction* industry sector, down 3,752 jobs or 34 percent. The majority remaining absolute losses came from *Manufacturing* (down 1,294 jobs or 18 percent) and *Retail Trade* (down 765 jobs or 5 percent).
- ✓ New Hanover's industrial average earnings exceed the national same-industry average in only one industry: *Manufacturing*.
- ✓ Double-digit percentage earnings gaps, where New Hanover's industry averages are notably lower than in the nation, exist in 14 of 19 major industry sectors.
- ✓ Over the last five years, the largest absolute occupational gains came from *Healthcare Practitioners & Technical* (up 949 jobs or 15 percent). Other significant gains were made in *Sales & Related* (up 931 jobs or 5 percent) and *Business & Financial Operations* (up 557 jobs or 10 percent).
- ✓ The greatest occupational losses have come from the Construction occupational group, down 2,762 jobs or 33 percent.
- ✓ New Hanover's occupational average earnings exceed the national average in 8 of 23 groups. Of significance, earnings in *Production* occupations are 25.6 percent above the national average and *Architecture & Engineering* occupations are 5.7 percent above.
- ✓ The *Arts, Entertainment, Recreation & Visitor Industries* cluster has experienced strong growth (up 817 jobs over the last five years) and has a high degree of local specialization, (location quotient of 1.49). Two other clusters with strong growth and high specialization are *Healthcare & Life Sciences* and *Education & Knowledge Creation*.
- ✓ The *Business & Financial Services* cluster experienced the highest absolute number of new jobs created yet does not exhibit a high degree of local specialization.
- ✓ Four clusters exhibit job growth generated from a local competitive effect: *Business & Financial Services, Health Care & Life Sciences*, *Education & Knowledge Creation,* and *Chemicals & Chemical Based Products*.
- ✓ Using standard major industry classifications, two industry sectors stand out with high local specialization and strong recent growth: *Real Estate* and *Accommodation & Food Services.*
- ✓ Using standard major industry classifications, a strong local competitive effect is exhibited in three industry sectors: *Real Estate*; *Arts, Entertainment & Recreation*; and *Government*.
- ✓ Four occupational groups share high specialization and strong growth: *Food Preparation & Serving*, *Healthcare Support*, *Sales & Related,* and *Healthcare Practitioners & Technical*.

CHAPTER 4: DEMOGRAPHIC & LABOR DYNAMICS

Population Growth

The rate of population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Most firms are wary of areas with population declines, very slow growth rates, or significant amounts of domestic out-migration

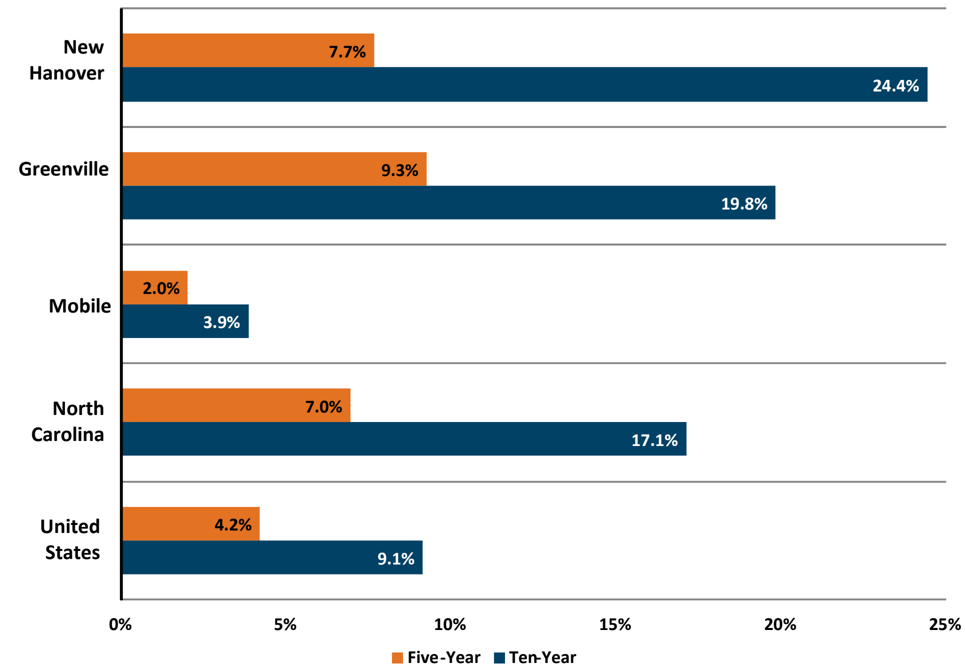
According to the 2012 Census figures, the total population of New Hanover equals 209,234. This marks an increase of 24.4 percent or 41,087 more residents over the last 10 years; the rate is above the nation, the state, and both benchmark communities (Figure 1 and Table 1). Over the last five years, New Hanover's growth rate is second to Greenville.

Chapter Data

Assessed as an average annual rate, New Hanover has grown at a rate of 2.2 percent over the last five years, above all examined geographies (Figure 2 and Table 1). Again, over the last five years, New Hanover's pace dropped to become second to Greenville.

Figure 1

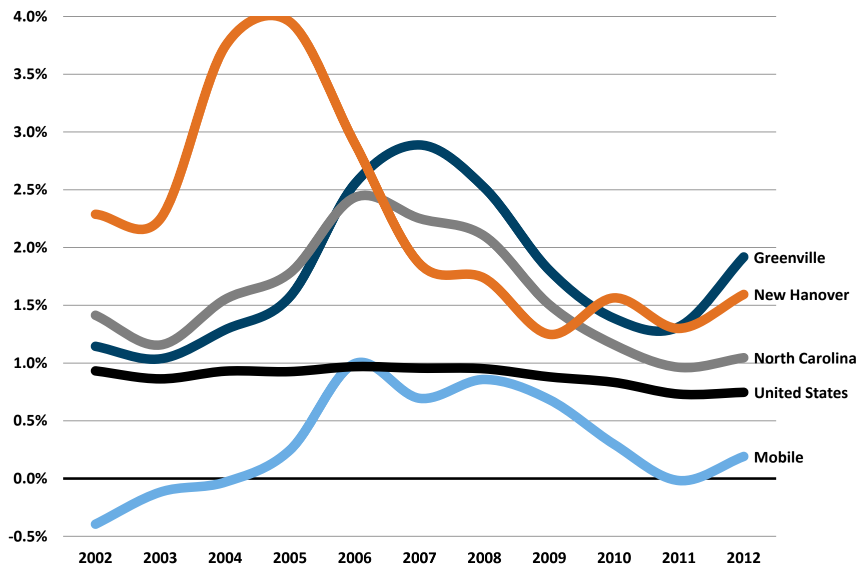
2002-2012 Population Change (%)



Source: US Census Bureau, Garner Economics

Figure 2

2002-2012 Annual Rates of Population Change (%)



Source: US Census Bureau, Garner Economics

Table 1

2002-2012 Population Change

Highest Relative Percent Shaded

	2012 Total	10-Year Change	10-Year Percent Change	5-Year Percent Change	10-Year Average Annual Rate	5-Year Average Annual Rate
New Hanover	209,234	41,087	24.4%	7.7%	2.2%	1.5%
Greenville	467,605	77,408	19.8%	9.3%	1.8%	1.8%
Mobile	413,936	15,387	3.9%	2.0%	0.3%	0.4%
North Carolina	9,752,073	1,425,872	17.1%	7.0%	1.6%	1.4%
United States	313,914,040	26,288,847	9.1%	4.2%	0.9%	0.8%

Source: US Census Bureau, Missouri Census Data Center, Garner Economics

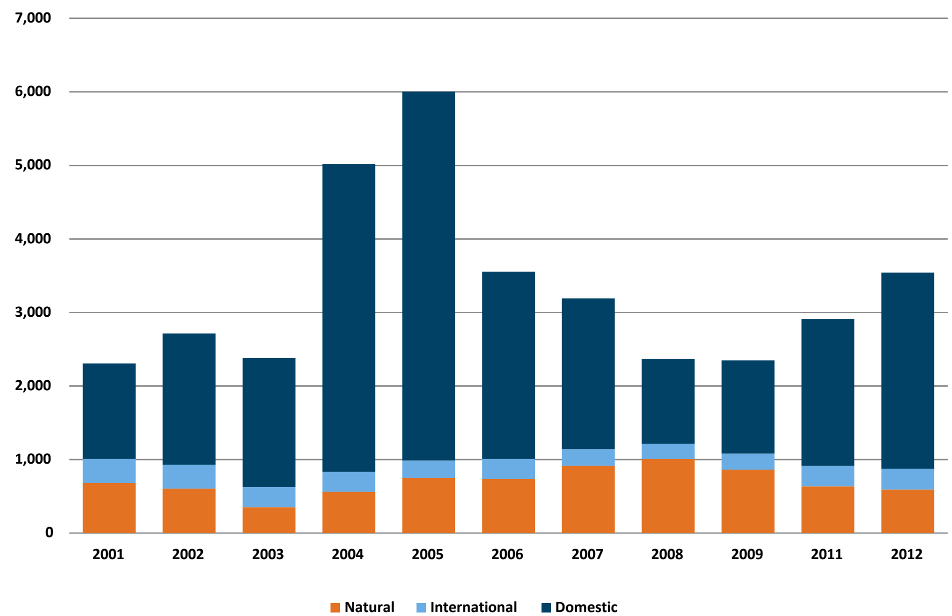
Sources of Population Change

Population change has three major sources: 1) natural (births minus deaths), 2) domestic migration, and, 3) international migration. In general, from a firm's perspective, growth dominated by natural or international sources may signal a population less likely to satisfy immediate workforce demands. Other firms, depending on their workforce composition or global reach, may seek communities with strong international growth. In all cases, net domestic out-migration (out-migration exceeding in-migration) is a cause for concern.

Domestic in-migration has accounted for an average of 67.7 percent (2,339 additional residents) of New Hanover's annual net population change over the last decade (Figure 3 and Table 2). Natural growth has contributed 23.4 percent of the growth and international contributed the remaining 8.9 percent.

At 68.2 percent, domestic in-migration has remained the major source of population change in Hew Hanover over the last two years, while in Greenville and North Carolina, statewide domestic in-migration accounts for 36.5 percent and 34.3 percent, respectively (Figure 4 and Table 3). Mobile experienced a net loss of domestic migration totaling 2,476 fewer residents.

Figure 3
New Hanover
Sources of Annual Population Change
*2001-2012**



**Year 2010 estimates unavailable.*
Source: US Census Bureau, Missouri Census Data Center, Garner Economics

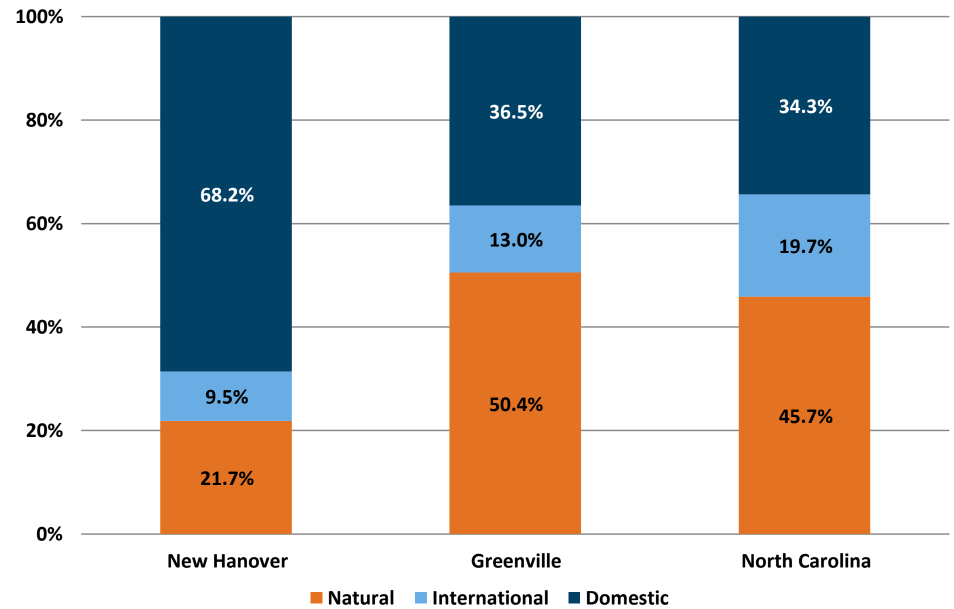
Table 2
New Hanover
Sources of Annual Population Change
*2001-2012**

Year	Natural	International	Domestic In-Migration
2001	680	328	1,299
2002	605	325	1,785
2003	352	272	1,757
2004	561	271	4,190
2005	750	237	5,015
2006	734	274	2,547
2007	915	225	2,051
2008	1,005	210	1,153
2009	862	221	1,266
2011	636	278	1,996
2012	594	283	2,667

**Year 2010 estimates unavailable.*
Components do not total exactly due to inter-year residual adjustments made by the Census Bureau.

Source: US Census Bureau, Garner Economics

Figure 4
Net Sources as Percent of Population Change
2010-2012



**Mobile experienced a net loss of domestic migration totaling -2,476.*
Source: US Census Bureau, Garner Economics

Table 3
Net Sources as Percent of Population Change
*2010-2012**

	Natural	International	Domestic In-migration
New Hanover	21.7%	9.5%	68.2%
Greenville	50.4%	13.0%	36.5%
North Carolina	45.7%	19.7%	34.3%

**Mobile experienced a net loss of domestic migration totaling -2,476.*

Source: US Census Bureau, Garner Economics

Population by Race and Hispanic Origin

By itself, racial diversity is not a determinant factor in local economic competitiveness, although some firms may prefer higher rates of diversity in order to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States.

At 82.2 percent, New Hanover has as a higher relative proportion of its population categorizing themselves as *White* compared to the benchmarks, the state, and the nation (Table 4). The *Hispanic or Latino* population makes up a relatively smaller proportion in Hew Hanover than in one benchmark community, the state, and the nation.

Table 4
2010-2012
Race & Hispanic Origin by Percent of Total Population
Highest Relative Figure Shaded

	New Hanover		Greenville	Mobile	North Carolina	US
	#	%				
White	169,513	82.2%	78.0%	61.6%	71.8%	76.4%
Black or African American	31,713	15.4%	19.2%	35.5%	22.7%	13.6%
American Indian/Alaska Native	1,897	0.9%	0.8%	1.4%	2.0%	1.6%
Asian	3,474	1.7%	2.5%	2.2%	2.7%	5.7%
Some other race	296	0.1%	0.1%	0.0%	0.1%	0.4%
Two or more races	2,757	1.3%	1.7%	0.6%	3.2%	5.3%
Hispanic or Latino of any race	10,996	5.3%	8.3%	2.5%	8.5%	16.6%

Source: US Census Bureau, Garner Economics

Age

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-age workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers.

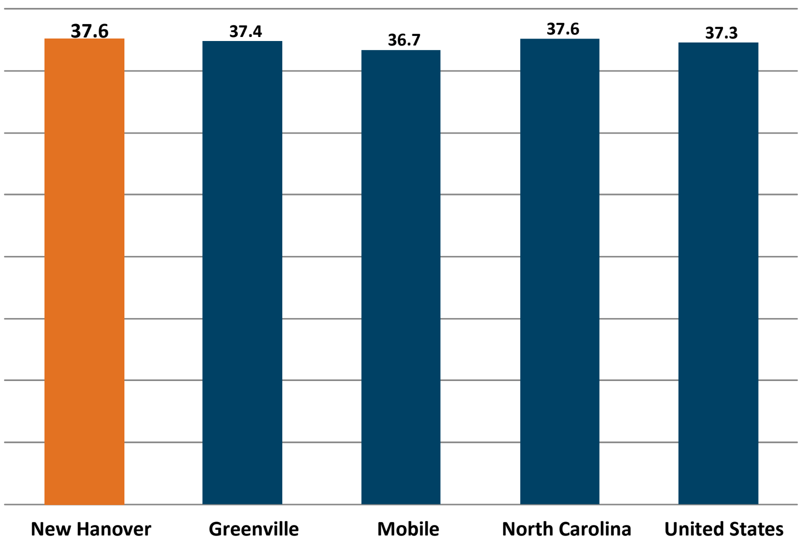
Median Age

At 37.6 years, the median age in New Hanover is on par with the state, the nation and Greenville but only slightly above Mobile's 36.7 median age (Figure 5 and Table 5).

Age Group Composition

New Hanover has a higher relative proportion of residents in ages 20-34 and 65-84 (Figures 6 & 7 and Table 5). Conversely, the area has a lower relative proportion of residents in ages less than 5-14 and 45-54.

Figure 5
Median Age
2010-2012 (3-year estimates)

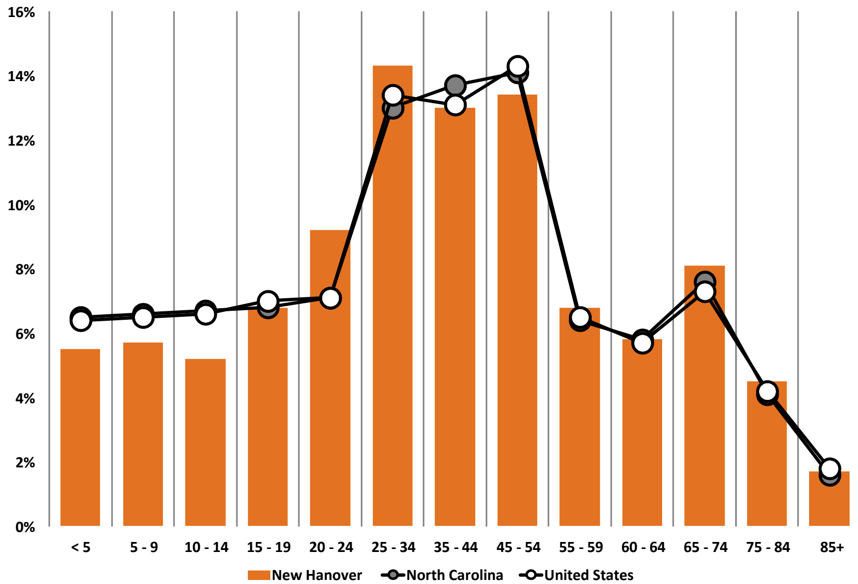


Source: US Census Bureau, Garner Economics

Figure 6

Age Groups by Percentage of Total Population

2010-2012 (3-year estimates))

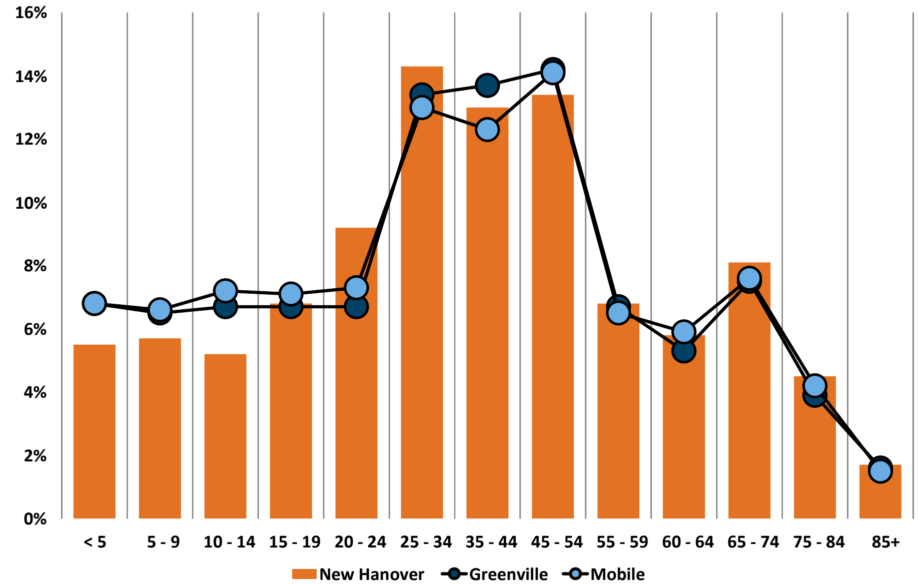


Source: US Census Bureau, Garner Economics

Figure 7

Age Groups by Percentage of Total Population

2010-2012 (3-year estimates)



Source: US Census Bureau, Garner Economics

Table 5
Age Groups by Percentage of Total Population
2010-2012 (3-year estimates)
Highest Relative Figure Shaded

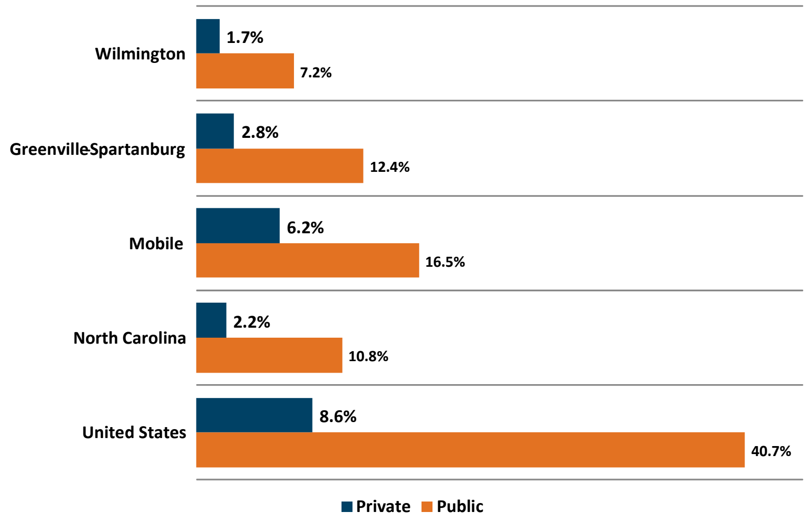
	New Hanover		Greenville	Mobile	North Carolina	United States
	#	%				
Median Age		37.6	37.4	36.7	37.6	37.3
< 5	11,361	5.5%	6.8%	6.8%	6.5%	6.4%
5-9	11,854	5.7%	6.5%	6.6%	6.6%	6.5%
10-14	10,656	5.2%	6.7%	7.2%	6.7%	6.6%
15-19	13,951	6.8%	6.7%	7.1%	6.8%	7.0%
20-24	19,062	9.2%	6.7%	7.3%	7.1%	7.1%
25-34	29,435	14.3%	13.4%	13.0%	13.0%	13.4%
35-44	26,718	13.0%	13.7%	12.3%	13.7%	13.1%
45-54	27,587	13.4%	14.2%	14.1%	14.1%	14.3%
55-59	14,003	6.8%	6.7%	6.5%	6.4%	6.5%
60-64	12,053	5.8%	5.3%	5.9%	5.8%	5.7%
65-74	16,742	8.1%	7.5%	7.6%	7.6%	7.3%
75-84	9,301	4.5%	3.9%	4.2%	4.1%	4.2%
85 +	3,442	1.7%	1.6%	1.5%	1.6%	1.8%

Source: US Census Bureau, Garner Economics

Unionization

At 1.7 percent, unionization among private businesses in the Wilmington metro is below both benchmarks, the state and nation[3]. Similarly, the public sector unionization rate at 7.2 percent is lowest among the other geographies examined (Figure 8 and Table 6).

Figure 8
Unionization Rates (%)
*2004**



**Most Current*
Source: © 2013 by Barry T. Hirsch and David A. Macpherson

Table 6
Unionization Rates (%)
*2004**

	Private	Public
Wilmington	1.7%	7.2%
Mobile	6.2%	16.5%
Greenville-Spartanburg	2.8%	12.4%
North Carolina	2.2%	10.8%
United States	8.6%	40.7%

**Most current*
Source: © 2013 by Barry T. Hirsch and David A. Macpherson

[3] Unionization rates are collected via the monthly *Current Employment Survey* conducted by the Bureau of Labor Statistics and reported separately by Barry T. Hirsch (Georgia State University) and David A. Macpherson (Trinity University). Survey results for the Wilmington metro have not been published since 2004. The 2004 results reflect the old metro delineation, which included Brunswick County.

Crime

Crime rates may seem outside the typical measures of economic competitiveness, but they represent a widely accepted objective gauge used by firms. Crime rates generally reflect underlying economic conditions and may signal deeper systemic problems better than standard economic measures.

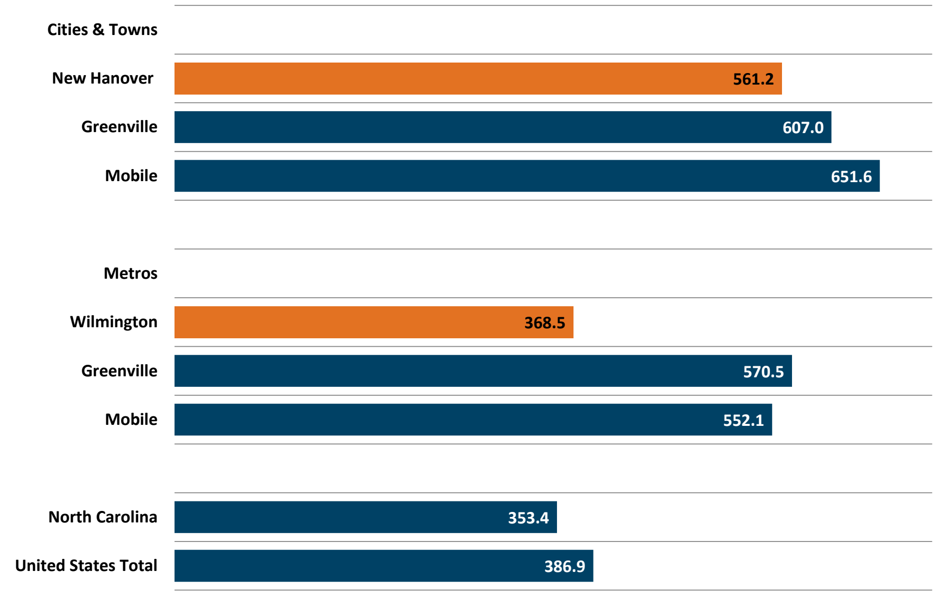
Measuring crimes in cities and towns[4], New Hanover (Carolina Beach, Wilmington, and Wrightsville Beach) has lower violent crime rates than in the cities and towns in both benchmark communities (Figure 9 and Table 7). Property crime rates are higher in the cities and towns of New Hanover than the benchmarks and may reflect the influence of nonresident tourism activity in the selected municipalities (Figure 10 and Table 7).

At the metro level, Wilmington has both lower violent and property crimes rates than in Greenville and Mobile.

Figure 9

Violent Crime Rates per 100,000 Residents

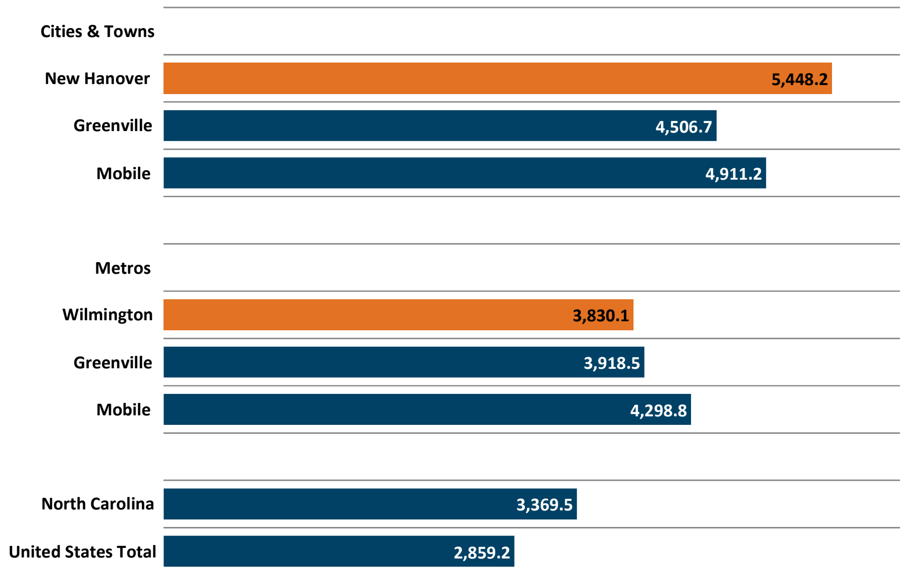
2012



Source: Federal Bureau of Investigation, Garner Economics

[4] While the FBI does report crimes figures at the county level, they do not reflect actual county totals but only the number of offenses reported by the sheriff's office or county police department and are, thus, not appropriate for use in evaluations.

Figure 10
Property Crime Rates per 100,000 Residents
2012



Source: Federal Bureau of Investigation, Garner Economics

Table 7
2012 Crime Rates per 100,000 Residents
Highest relative rate shaded.

	Violent	Property
Cities & Towns		
New Hanover*	561.2	5,448.2
Greenville	607.0	4,506.7
Mobile	651.6	4,911.2
Metros		
Wilmington	368.5	3,830.1
Greenville	570.5	3,918.5
Mobile	552.1	4,298.8
North Carolina	353.4	3,369.5
United States Total	386.9	2,859.2

*Carolina Beach, Wilmington, and Wrightsville Beach
Source: Federal Bureau of Investigation, Garner Economics

Education

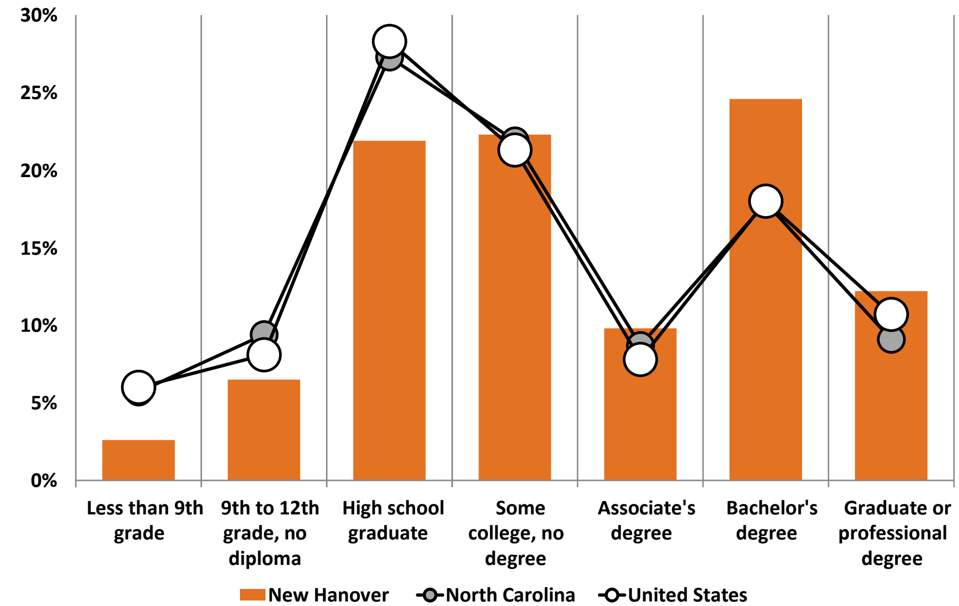
Increasingly, the level of education of a community's population is becoming a decisive factor in economic competitiveness. Firms understand the need to operate in economies that offer a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

Educational Attainment

Comparing levels of educational attainment reveals a distinct characteristic among New Hanover's residents ages 25 and over. Compared to the state, the nation, and both benchmark communities, New Hanover has a higher relative proportion of residents who have attained an *Associate, Bachelor's* or *Graduate* degree (Figures 11 & 12 and Table 8). Conversely, the area has a lower relative proportion of residents in the categories of High School graduate and lesser levels of educational attainment.

Figure 11

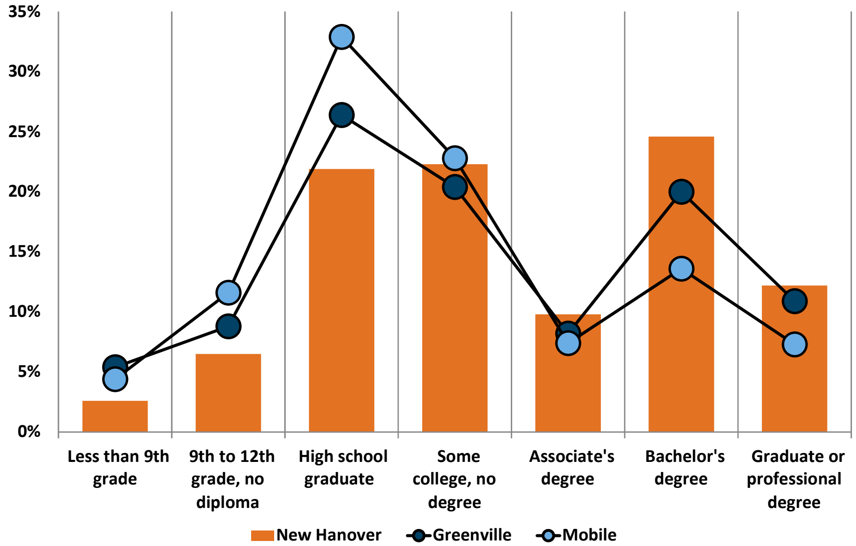
Educational Attainment Percentage, Total Population Age 25+
2010-2012 (3-year estimates)



Source: US Census Bureau, Garner Economics

Figure 12

Educational Attainment Percentage, Total Population Age 25+
2010-2012 (3-year estimates)



Source: US Census Bureau, Garner Economics

Table 8

Educational Attainment Percentage, Total Population Age 25+
2010-2012 (3-year estimates)
Highest Relative Figure Shaded

	New Hanover		Greenville	Mobile	North Carolina	US
	#	%				
Less than 9th grade	3,648	2.6%	5.4%	4.4%	5.7%	6.0%
9th to 12th grade, no diploma	9,110	6.5%	8.8%	11.6%	9.4%	8.1%
High school graduate	30,448	21.9%	26.4%	32.9%	27.3%	28.3%
Some college, no degree	31,060	22.3%	20.4%	22.8%	21.9%	21.3%
Associates degree	13,708	9.8%	8.2%	7.4%	8.7%	7.8%
Bachelor's degree	34,257	24.6%	20.0%	13.6%	17.9%	18.0%
Graduate or professional degree	17,050	12.2%	10.9%	7.3%	9.1%	10.7%

Source: US Census Bureau, Garner Economics

Field of Bachelor's Degree

Beyond the level of educational attainment, the specific fields in which residents hold degrees may offer implications about the competitiveness and applicability of local knowledge and skills. New Hanover has higher relative proportions of bachelor's degree attainment in six fields: *Biological, Agricultural, and Environmental Sciences*; *Psychology; Social Sciences; Literature and Language; Visual and Performing Arts;* and *Communications* (Table 9).

Table 9
Field of Bachelor's Degree by Percentage of Total Population Age 25+
2009-2011 3-Year Estimate (highest relative percentages in shaded)

	New Hanover		Greenville	Mobile	North Carolina	United States
	#	%				
Science and Engineering						
Computers, Mathematics, and Statistics	1,109	2.2%	2.7%	3.5%	4.1%	4.2%
Biological, Agricultural, and Environmental Sciences	4,421	8.6%	4.6%	5.4%	6.5%	6.1%
Physical and Related Sciences	1,510	2.9%	3.5%	2.4%	3.4%	3.4%
Psychology	2,970	5.8%	4.3%	3.7%	4.9%	4.7%
Social Sciences	4,643	9.0%	6.2%	4.3%	7.5%	7.8%
Engineering	2,941	5.7%	10.5%	7.5%	6.6%	7.8%
Multidisciplinary Studies	146	0.3%	0.7%	0.4%	0.5%	0.6%
Science and Engineering Related Fields	4,099	8.0%	8.3%	12.0%	9.0%	9.0%
Business	10,298	20.1%	24.7%	20.3%	20.6%	20.4%
Education	7,347	14.3%	12.9%	21.3%	14.2%	13.7%
Arts, Humanities						
Literature and Languages	3,015	5.9%	4.9%	2.9%	4.4%	4.4%
Liberal Arts and History	2,263	4.4%	5.6%	5.5%	5.3%	5.1%
Visual and Performing Arts	2,201	4.3%	3.5%	2.2%	3.3%	4.0%
Communications	1,999	3.9%	3.2%	3.5%	3.5%	3.7%

Source: US Census Bureau, Garner Economics

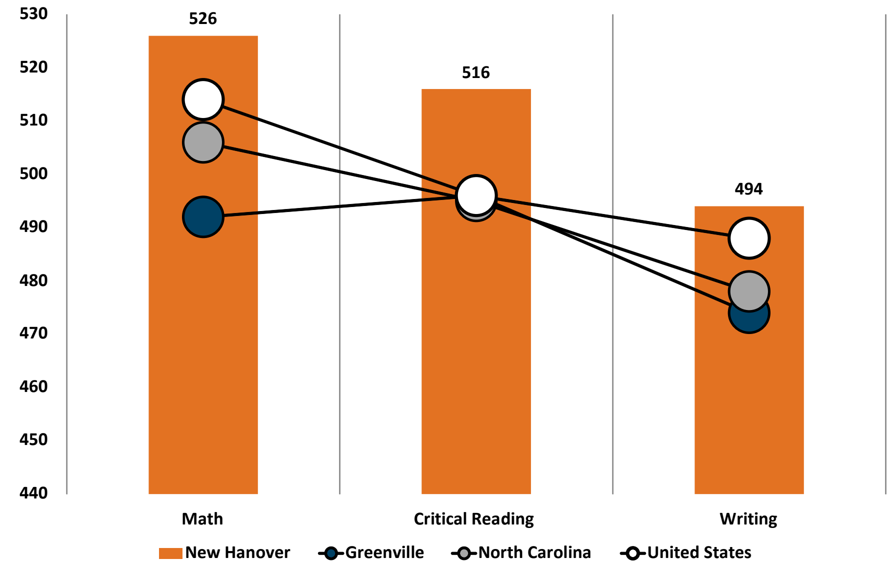
SAT Scores

The SAT Reasoning Test is a standardized test for college admissions in the United States and a widely accepted measure of education quality. SAT scores are especially relevant to businesses because they provide a measure of the "final product" of public schools and the educational quality of those entering the workforce.

At 1536, New Hanover's 2012 SAT composite scores are above the state, the nation, and Greenville (Figure 13 and Table 10). Mobile does not publish SAT scores. New Hanover had the highest relative SAT scores in all three subject areas (Figure 14).

Figure 14

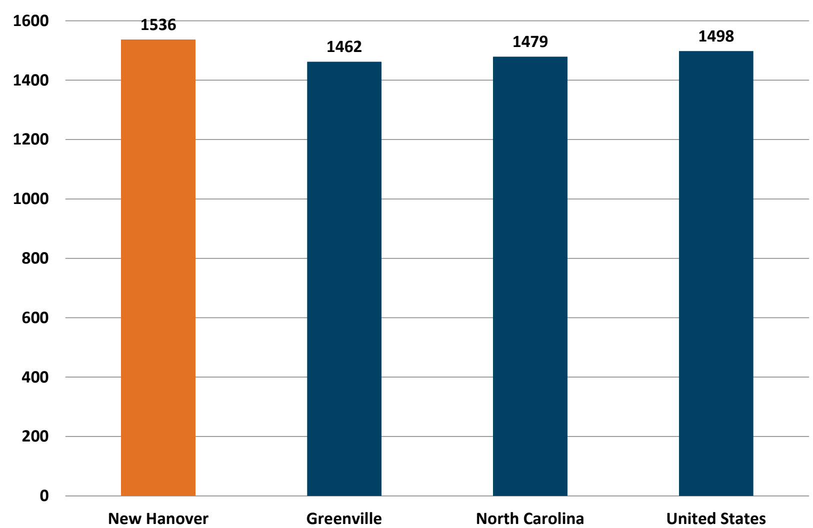
*2012 SAT Subject Scores**



Source: Pennsylvania Department of Education,
North Carolina Department of Public Instruction, Garner Economics

Figure 13

*2012 SAT Combined Scores**



**The Alabama Department of Education does not publish SAT scores.*
Source: South Carolina Department of Education,
North Carolina Department of Public Instruction,
Garner Economics

Table 10

*2012 SAT Scores**

Highest relative rates shaded.

	Math	Critical Reading	Writing	Composite
New Hanover	526	516	494	1536
Greenville	492	496	474	1462
North Carolina	506	495	478	1479
United States	514	496	488	1498

**The Alabama Department of Education does not publish SAT scores.*
Source: South Carolina Department of Education,
North Carolina Department of Public Instruction,

Garner Economics

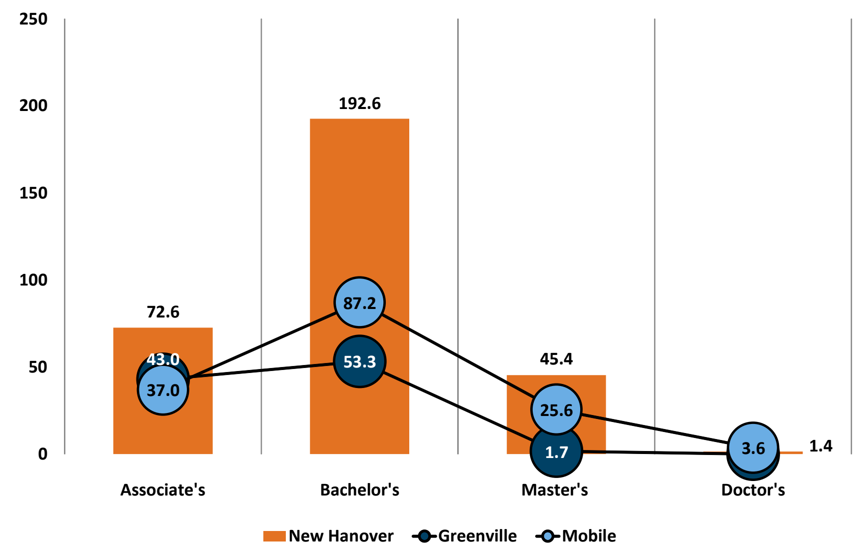
STEM Degree Completions

Degree completions in STEM fields (Science, Technology, Engineering, and Mathematics) are an important indicator of regional competitiveness and economic potential. STEM-related careers are amongst some of the best-paying jobs and typically have excellent potential for future growth.

Measured as *completions per 100,000 residents*, New Hanover has more per capita *Associate's*, *Bachelor's,* and *Master's* degree completions in STEM fields than in the two benchmarks (Figure 15 and Tables 11 & 12). Mobile has higher per capita STEM completions that earn Doctor's degrees.

Within STEM fields in New Hanover, the highest number of associate's degree completions are in *Engineering & engineering technologies*, the highest number of bachelor's degree completions are in *Biological & biomedical sciences*, and the highest number of master's degree completions are in *Physical sciences* (Figure 16 and Table 13).

Figure 15
2012 STEM Degree Completions
Per 100,000 Residents



Source: National Center for Education Statistics, Garner Economics

Table 11
STEM Degree Completions 2012
Rate per 100,000 Residents
Highest relative rates shaded.

	Associate's	Bachelor's	Master's	Doctor's
New Hanover	72.6	192.6	45.4	1.4
Greenville	43.0	53.3	1.7	0.0
Mobile	37.0	87.2	25.6	3.6

Source: National Center for Education Statistics, Garner Economics

Table 12

Total STEM Degree Completions 2012

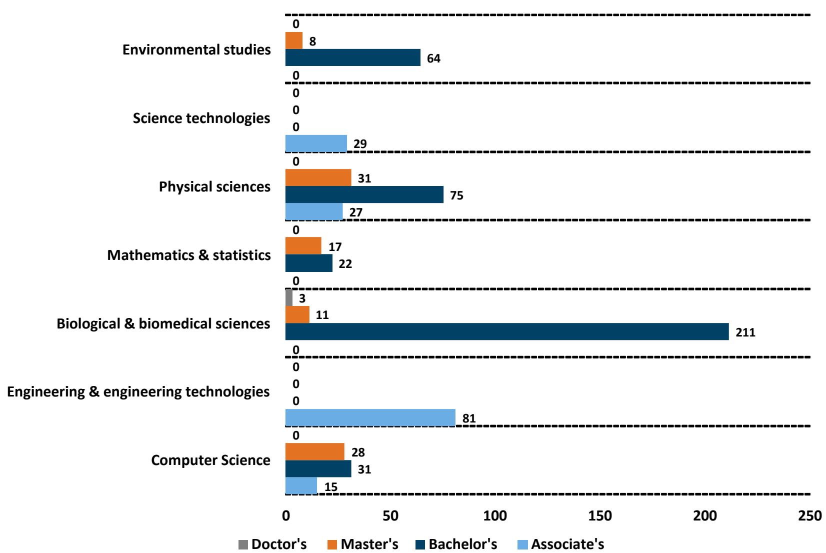
	Associate's	Bachelor's	Master's	Doctor's
New Hanover	152	403	95	3
Greenville	201	249	8	0
Mobile	153	361	106	15

Source: National Center for Education Statistics, Garner Economics

Figure 16

Annual STEM Completions

New Hanover 2012



Source: National Center for Education Statistics, Garner Economics

Table 13

Annual STEM Completions

New Hanover 2012

Highest relative STEM number shaded.

	Associate's	Bachelor's	Master's	Doctor's
Computer Science	15	31	28	0
Engineering & engineering technologies	81	0	0	0
Biological & biomedical sciences	0	211	11	3
Mathematics & statistics	0	22	17	0
Physical sciences	27	75	31	0
Science technologies	29	0	0	0
Environmental Studies	0	64	8	0
Non-STEM	437	2,352	345	12

Source: National Center for Education Statistics, Garner Economics

College or Graduate School Enrollment

Annually, 13.7 percent of the population ages 15 and over is enrolled in a college or graduate school in New Hanover. Of those, 12.3 percent are in public schools and the remaining 1.4 percent are in private schools (Figure 17 and Table 14). The total enrollment percentage is well above both benchmark communities, the state, and the nation. New Hanover has the largest comparable share (12.3 percent) of college or graduate school enrollment in *public* schools.

Table 14

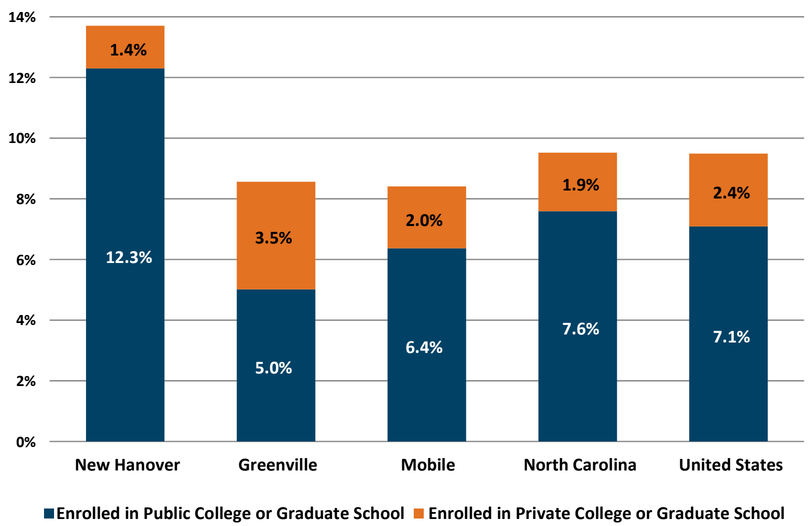
Percent Population Enrolled in College or Graduate School
Ages 15 and Over
2010-2012 Annual Estimates
Highest relative percentages shaded.

	New Hanover #	New Hanover %	Greenville	Mobile	North Carolina	United States
Public	21,186	12.3%	5.0%	6.4%	7.6%	7.1%
Private	2,426	1.4%	3.5%	2.0%	1.9%	2.4%
Total	23,612	13.7%	8.6%	8.4%	9.5%	9.5%

Source: US Census Bureau, Garner Economics

Figure 17

Percent Population Enrolled in College or Graduate School
Ages 15 and Over
2010-2012 Annual Estimate



Source: US Census Bureau, Garner Economics

Population In-migration by Educational Attainment

Compared to the state, the nation, and benchmark communities, New Hanover attracts a higher proportion of new residents, ages 25 and older, with the highest level of educational attainment at *Some college or associate's degree* and *Graduate or professional degree* (Figure 18 and Table 15). Conversely, New Hanover attracts a relatively smaller proportion of new residents with an educational attainment of *Less than high school graduate* compared to the state, the nation, and both benchmark communities.

It should be noted that the data collection and methodology for these figures differs from that reported earlier pertaining to the *sources of population change*. The *In-migration by Educational Attainment* data sample is smaller and should be used as a measure of relative comparison across geographies, rather than an exact, absolute measure.

Table 15

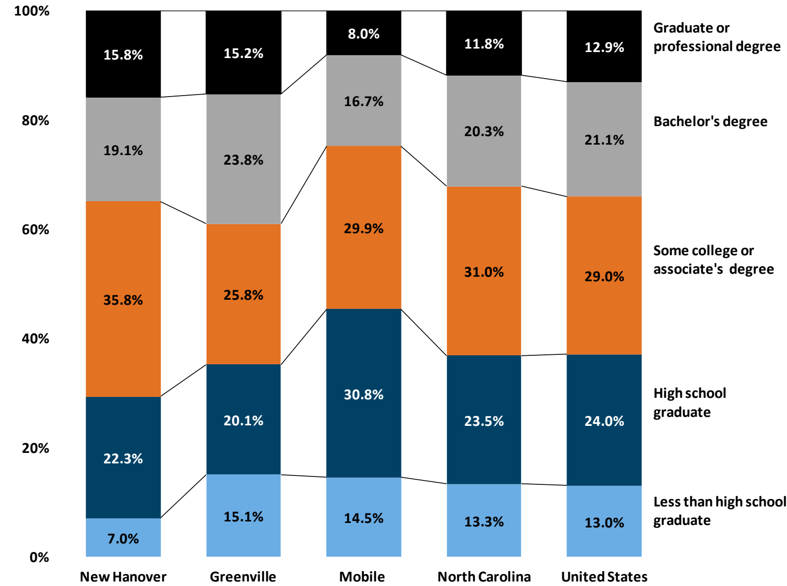
Educational Attainment by Percent of In-migration Population, Ages 25 and over
2010-2012 3-Year Annual Estimates
(Highest relative percentages in shaded)

	New Hanover #	New Hanover %	Greenville	Mobile	North Carolina	US
Less than high school graduate	648	7.0%	15.1%	14.5%	13.3%	13.0%
High school graduate	2,050	22.3%	20.1%	30.8%	23.5%	24.0%
Some college or associate's degree	3,293	35.8%	25.8%	29.9%	31.0%	29.0%
Bachelor's degree	1,754	19.1%	23.8%	16.7%	20.3%	21.1%
Graduate or professional degree	1,453	15.8%	15.2%	8.0%	11.8%	12.9%

Source: US Census Bureau, Garner Economics

Figure 18

Educational Attainment by Percent of In-migration Population
Ages 25 and over
2010-2012 3-Year Annual Estimates



Source: US Census Bureau, Garner Economics

Worker Flows

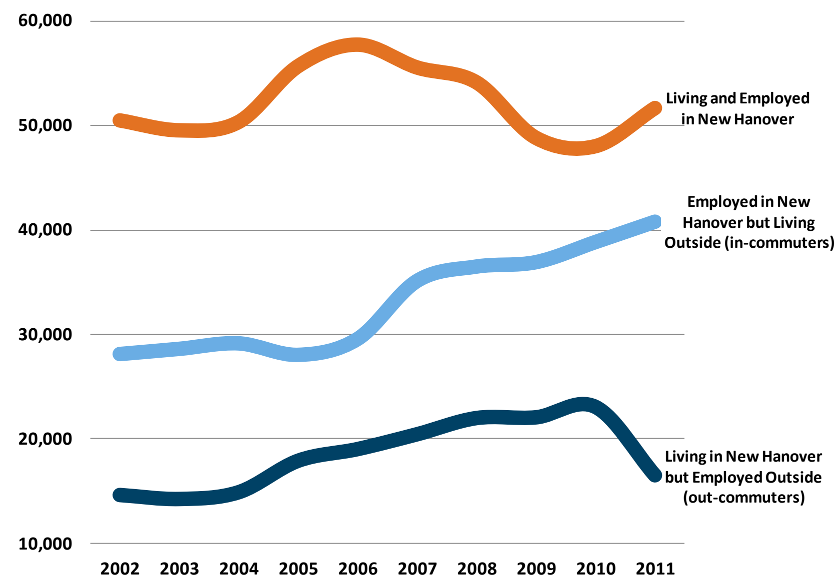
Worker flows help define the size of a local economy's labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments (major construction projects, on-site consulting, etc.).

From 2002 to 2011, the number and proportion of workers who both live and work in New Hanover has increased by 2.3 percent or 1,184 more workers, an annual rate of 0.4 percent (Figure 19 and Table 16). Over the same period, the number of workers "*Employed in New Hanover but Living Outside (in-commuters)*" increased by 45.1 percent or 12,690, an annual rate of 4.4 percent. Additionally, the number of workers "*Living in the New Hanover but Employed Outside (out-commuters)*" increased by 19.9 percent or 1,889 workers, an annual rate of 2.2 percent.

Among working *residents* of New Hanover, 51,693 or 75.8 percent of the total are employed in New Hanover. Brunswick County attracts 3,158 New Hanover residents for work, 4.6 percent of the total (Table 17).

Of all *workers* in New Hanover, 55.9 percent of the total also live in New Hanover. Brunswick County is the home of 9,156 or 9.9 percent of the total Hew Hanover workforce (Table 18).

Figure 19
Worker Flows
New Hanover



Source: US Census Bureau, Garner Economics

Table 16
Worker Flows
New Hanover

	2011	2002-2011 Change		Average Annual Rate
Living & Employed in New Hanover	51,693	1,184	2.3%	0.4%
Living in New Hanover but Employed Outside (out-commuters)	16,489	1,889	12.9%	2.2%
Employed in New Hanover but Living Outside (in-commuters)	40,820	12,690	45.1%	4.4%

Source: US Census Bureau, Garner Economics

Table 17
Where Workers who Live
in New Hanover are Employed
Top Ten Counties 2011

County	Number	Percent
New Hanover	51,693	75.8%
Brunswick	3,158	4.6%
Wake	1,700	2.5%
Pender	1,666	2.4%
Cumberland	1,012	1.5%
Onslow	909	1.3%
Mecklenburg	827	1.2%
Columbus	731	1.1%
Horry County, SC	574	0.8%
Duplin	532	0.8%

Source: US Census Bureau, Garner Economics

Table 18
Where Workers who are
Employed in New Hanover Live
Top Ten Counties 2011

County	Number	Percent
New Hanover	51,693	55.9%
Brunswick	9,156	9.9%
Pender	7,286	7.9%
Wake	2,465	2.7%
Onslow	1,822	2.0%
Columbus	1,743	1.9%
Mecklenburg	1,629	1.8%
Cumberland	1,170	1.3%
Guilford	789	0.9%
Bladen	739	0.8%

Source: US Census Bureau, Garner Economics

Chapter 5: Economic Dynamics

Gross Domestic Product

Gross Domestic Product (GDP) is the most comprehensive measure of economic activity or output. GDP for metro areas is derived as the sum of the GDP originating in all the industries in the area. In 2012, the inflation-adjusted real GDP for the Wilmington metro totaled 9.8 billion. Over the last ten years, real GDP in Wilmington increased by $2 billion, up 25.6 percent, a rate above the nation, the state, and both benchmark communities (Figure 20 and Table 19). Similarly, the five-year GDP growth rate has outpaced all geographies examined.

Measured in per capita terms, at $37,297 in 2012, Wilmington has a lower relative amount of economic activity than the state and nation but is above both benchmark communities (Figure 21 and Table 20). Over the last ten years, real per capita GDP in Wilmington increased by $887, up 2.4 percent—a pace below all but Greenville. Over the last five years, real per capita GDP declined by $1,034, down 2.7 percent.

Table 19

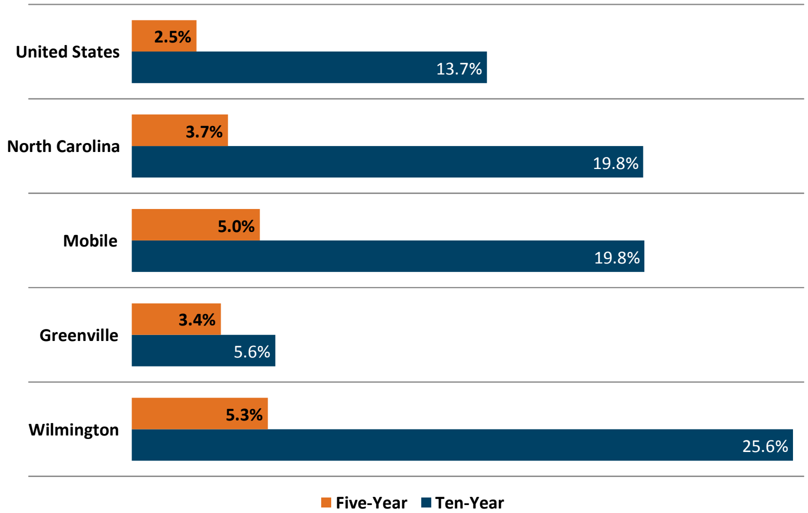
Real Gross Domestic Product
(millions of dollars - inflation adjusted to 2005 dollars)
Highest relative rate shaded.

		Ten-Year Change		Five-Year Change	
	2012	Dollars	%	Dollars	%
Wilmington	9,825	$2,001	25.6%	$491	5.3%
Greenville	28,701	$1,510	5.6%	$955	3.4%
Mobile	14,522	$2,403	19.8%	$685	5.0%
North Carolina	392,905	$64,886	19.8%	$14,091	3.7%
United States	13,430,576	$1,621,542	13.7%	$327,235	2.5%

Source: US Bureau of Economic Analysis, Garner Economics

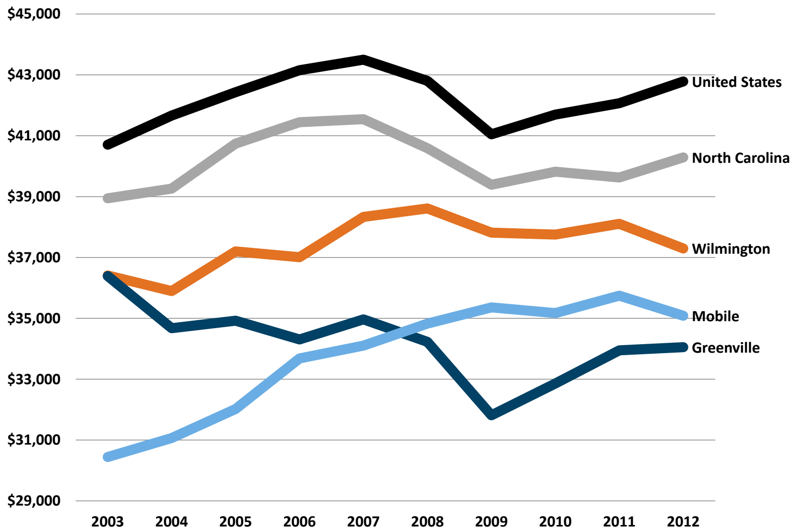
Chapter Data

Figure 20
Change in Real Gross Domestic Product
(inflation adjusted to 2005 dollars)



Source: US Bureau of Economic Analysis, Garner Economics

Figure 21
Per Capita Real Gross Domestic Product
(inflation adjusted to 2005 dollars)



Source: US Bureau of Economic Analysis, Garner Economics

Table 20
Per Capita Real Gross Domestic Product
(inflation adjusted to 2005 dollars)
Highest relative figures shaded.

		Ten-Year Change		Five-Year Change	
	2012	Dollars	%	Dollars	%
Wilmington	$37,297	$887	2.4%	($1,034)	-2.7%
Greenville	$34,052	($2,335)	-6.4%	($914)	-2.6%
Mobile	$35,084	$4,640	15.2%	$980	2.9%
North Carolina	$40,289	$1,343	3.4%	($1,257)	-3.0%
United States	$42,784	$2,078	5.1%	($715)	-1.6%

Source: US Bureau of Economic Analysis, Garner Economics

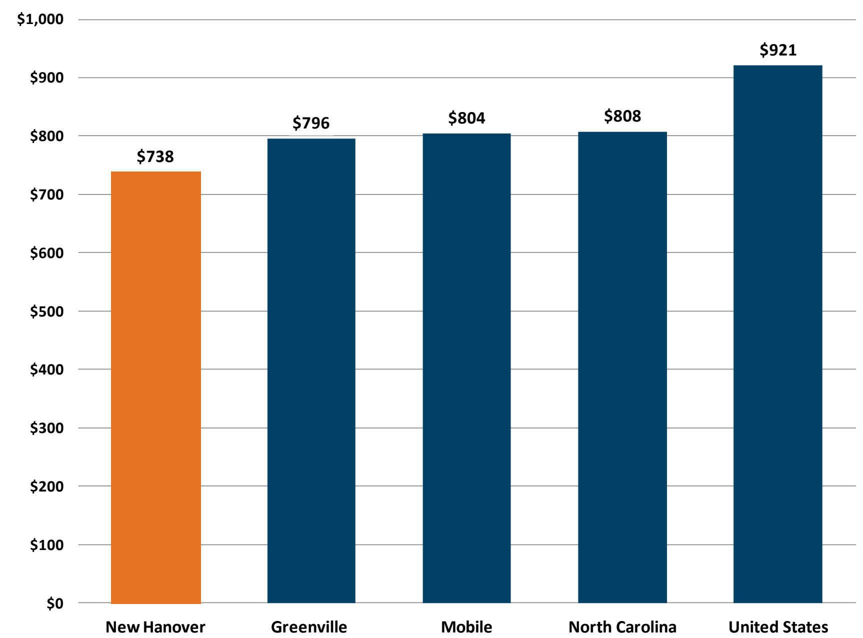
Average Weekly Wage

According to the US Bureau of Labor Statistics, as of the second quarter of 2013, New Hanover's average weekly wage stood at $738. The figure is 24.8 percent below the nation, 9.5 percent below the state, and below both benchmarks (Figure 22 and Table 21). Over the last ten years, the nominal (unadjusted for inflation) average weekly wage in New Hanover has increased by 29.7 percent, a pace below the nation, the state, and Mobile. Over the five most recent years, the rate of growth was 7.6 percent, a pace below all the other geographies examined.

Correcting growth in the average wage per job to real values (adjusting for inflation) provides a more realistic view of the actual spending value of the wage dollars. Over the last ten years, growth in real values for the average weekly wage in New Hanover has increased by 2.5 percent ($14) and has declined by 0.5 percent (-$3) in the last five years (Figure 23 and Table 21).

Figure 22

Average Weekly Wage – 2013 2Q



Source: US Bureau of Economic Analysis, Garner Economics

Table 11

Average Weekly Wage Per Job

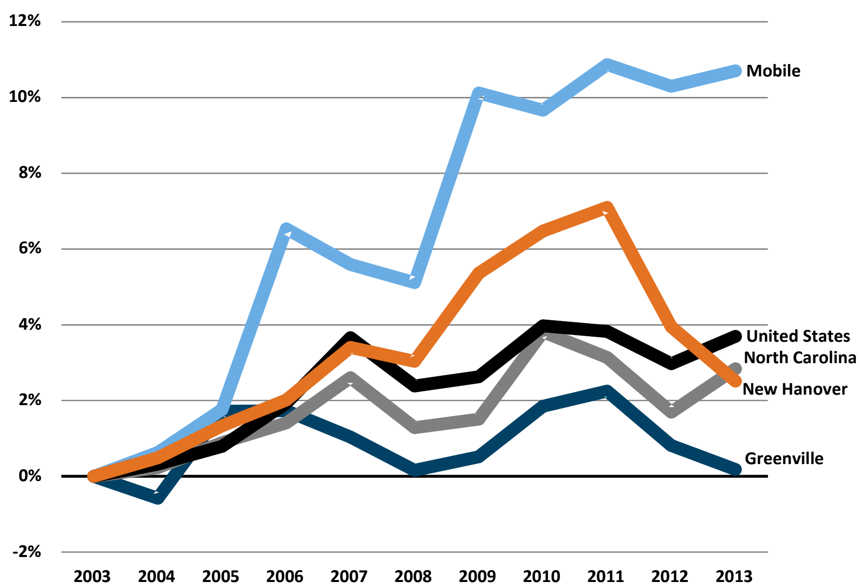
Highest relative figures shaded.

	2013 2Q	10-Year Change				5-Year Change			
		Unadjusted		Inflation Adjusted		Unadjusted		Inflation Adjusted	
		$	%	$	%	$	%	$	%
New Hanover	$738	$169	29.7%	$14	2.5%	$52	7.6%	($3)	-0.5%
Greenville	$796	$168	26.8%	$1	0.2%	$60	8.2%	$0	0.0%
Mobile	$804	$230	40.1%	$61	10.7%	$98	13.9%	$32	5.3%
North Carolina	$808	$187	30.1%	$18	2.8%	$72	9.8%	$10	1.5%
United States	$921	$219	31.2%	$26	3.7%	$80	9.5%	$9	1.3%

Source: US Bureau of Economic Analysis, Garner Economics

Figure 23

Ten-Year Percent Change in Average Weekly Wage per Job
Adjusted for Inflation (year 2003 = 0)



Source: US Bureau of Economic Analysis, Garner Economics

Per Capita Income

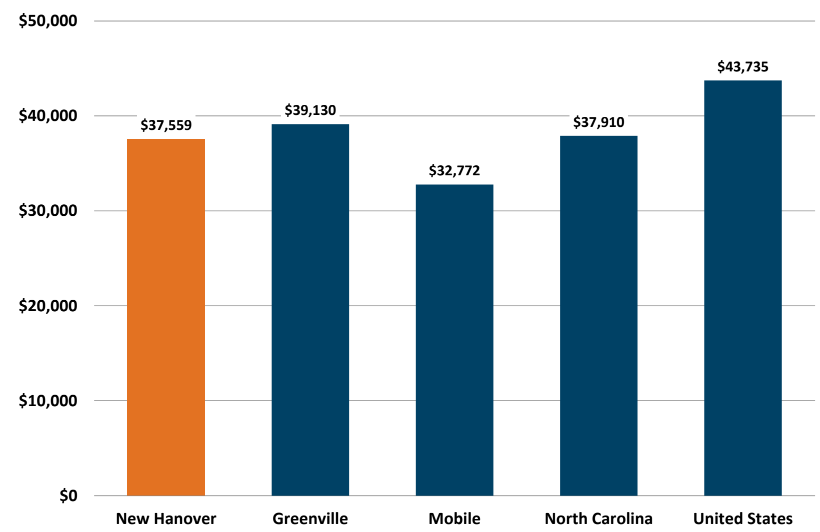
According to the US Bureau of Economic Analysis, in 2012, New Hanover's per capita income equaled $37,599.[5] The figure is 16.4 percent below the nation and 0.9 percent below the state. New Hanover's per capita income is 12.7 percent above Mobile's and 4.2 percent below Greenville's (Figure 24 and Table 22).

Over the last ten years, the nominal (unadjusted for inflation) per capita income in New Hanover has increased by 27.2 percent; the pace is below the nation, the state, and both benchmark communities. Similarly the pace over the five most recent years is below all the geographies examined.

Correcting the growth in per capita income to real values (adjusting for inflation) provides a more realistic view of the actual change in the spending value of income dollars. Over the last ten years, growth in real values for the per capita income in New Hanover has declined by 0.3 percent (-$99) and in the last five years, is down by 6.1 percent (-$1,911) (Figure 25 and Table 22).

Figure 24

Per Capita Income - 2012

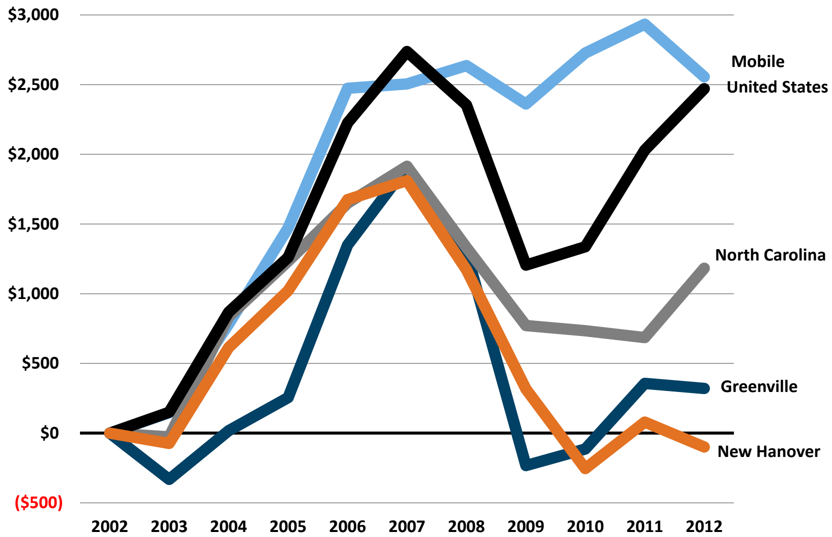


Source: US Bureau of Economic Analysis, Garner Economics

[5] Per capita income is the income that is received by persons from all sources. It is calculated as the sum of wage and salary disbursements, supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts, less contributions for government social insurance. This measure of income is calculated as the personal income of the residents of a given area divided by the resident population of the area.

Figure 25

Ten-Year Change in Per Capita Income Adjusted for Inflation (year 2002 = 0)



Source: US Bureau of Economic Analysis, Garner Economics

Table 22

Per Capita Income

Highest relative figures shaded.

	2012	10-Year Change				5-Year Change			
		Unadjusted		Inflation Adjusted		Unadjusted		Inflation Adjusted	
		$	%	$	%	$	%	$	%
New Hanover	$37,559	$8,030	27.2%	($99)	-0.3%	$1,438	4.0%	($1,911)	-6.1%
Greenville	$39,130	$8,790	29.0%	$321	1.1%	$1,958	5.3%	($1,592)	-4.9%
Mobile	$32,772	$9,649	41.7%	$2,556	11.1%	$3,235	11.0%	$51	0.2%
North Carolina	$37,910	$9,388	32.9%	$1,183	4.1%	$2,831	8.1%	($732)	-2.4%
United States	$43,735	$11,937	37.5%	$2,471	7.8%	$3,931	9.9%	($267)	-0.8%

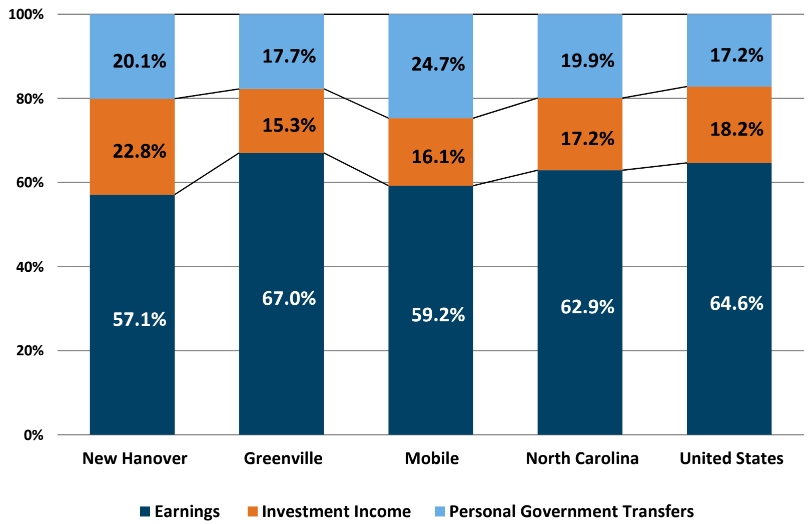
Source: US Bureau of Economic Analysis, Garner Economics

Components of Per Capita Income

Per capita income is the sum of earnings, investment income, and personal government transfer payments divided by the resident population. In 2012, earnings accounted for 57.1 percent of per capita income in New Hanover, a proportion below the nation, the state, and both benchmark communities (Figure 26 and Table 23). At 22.8 percent, investment income comprises a larger relative proportion of per capita income in New Hanover than in the other geographies examined.

Figure 26

Components of Per Capita Income 2012



Source: US Bureau of Economic Analysis, Garner Economics

Table 23

Components of Per Capita Income - 2012

Highest relative percentages shaded.

	Earnings	Investment Income	Personal Government Transfers
New Hanover	57.1%	22.8%	20.1%
Greenville	67.0%	15.3%	17.7%
Mobile	59.2%	16.1%	24.7%
North Carolina	62.9%	17.2%	19.9%
United States	64.6%	18.2%	17.2%

Source: US Bureau of Economic Analysis, Garner Economics

Exports

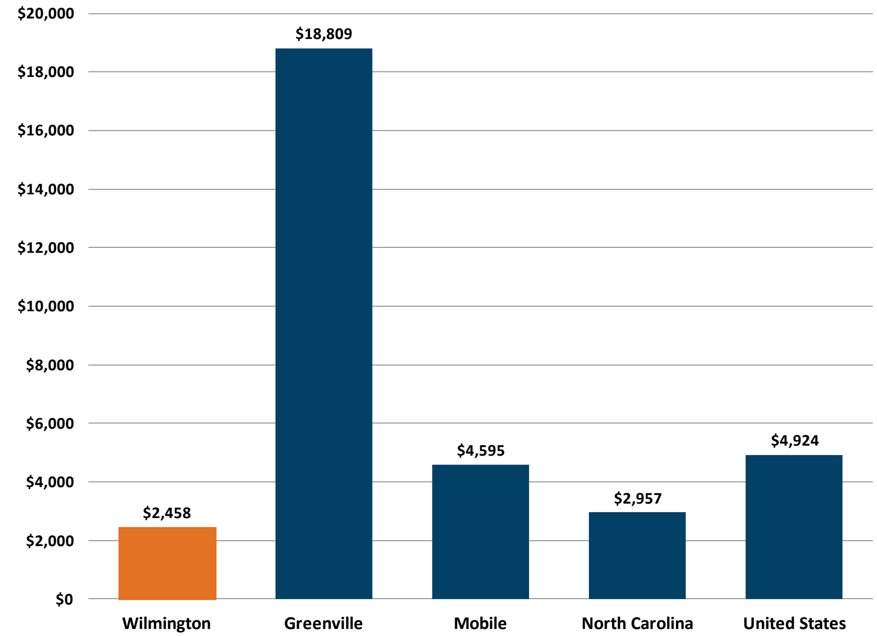
In a global economy, exports are playing a more critical role in local economic competitiveness. Exporting has proven to be a powerful means to generate wealth and provides evidence of an area's capacity to compete with firms outside the United States.

As of 2012, the Wilmington metro (old 3-county delineation) had exports totaling $923 million. In per capita terms, at $2,458, Wilmington's exports are below the nation and both benchmark metros (Figure 27 and Table 24). Adjusting for inflation, from 2005 to 2012, exports increased 37.4 percent in the Wilmington metro, a rate below the nation, the state, and one benchmark metro (Figure 28 and Table 26).

At 34.6 percent, *Chemical Manufacturing* comprised the greatest share of Hew Hanover's exports in 2012. The next largest contributor was *Machinery Manufacturing* at 9.9 percent of all exports.

Figure 27

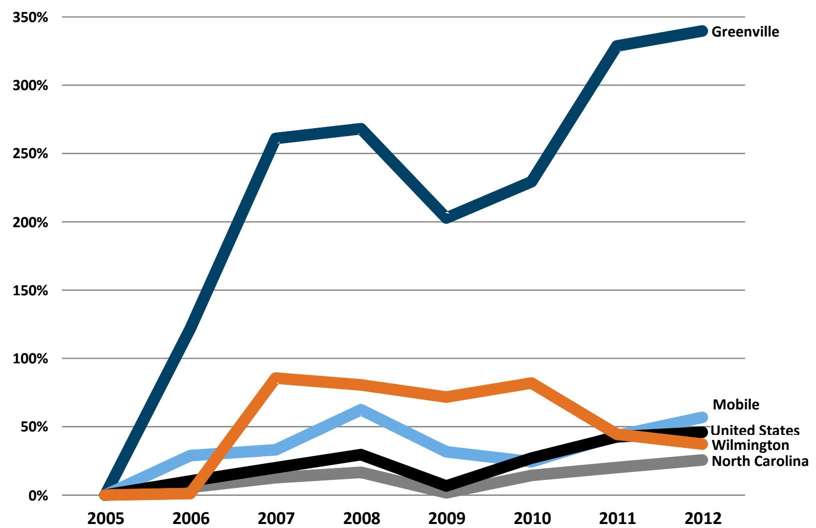
*Per Capita Exports - 2012**



**2012 metropolitan definitions*

Source: Office of Trade and Industry Information, Manufacturing and Services, International Trade Administration, US Department of Commerce, Garner Economics

Figure 28
2005-2012
*Percent Change in Exports**
Inflation Adjusted 2005=0



**2012 metropolitan definitions*
Source: Office of Trade and Industry Information, Manufacturing and Services, International Trade Administration, US Department of Commerce, Garner Economics

Table 24
*Exports**
Highest relative figures shaded.

	2012 Total	2012 Per Capita	2005-2012 Change (inflation adjusted) %	2005-2012 Change (inflation adjusted) $
Wilmington	$923,454,440	$2,458	37.4%	$213,757,909
Greenville	$12,291,825,186	$18,809	339.7%	$8,077,908,755
Mobile	$1,901,894,357	$4,595	56.8%	$586,047,221
North Carolina	$28,832,674,500	$2,957	25.7%	$5,018,877,021
United States	$1,545,708,500,116	$4,924	45.9%	$413,747,277,382

**2012 metropolitan definitions*
Source: Office of Trade and Industry Information, Manufacturing and Services, International Trade Administration, US Department of Commerce, Garner Economics

Proprietor Employment

Measuring the relative proportion of proprietor income and self-employment is a means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and dynamism.

According to the US Bureau of Economic Analysis, as of 2012, proprietor income accounted for 13.3 percent of total employment income in New Hanover, a portion above the nation, the state, and both benchmark communities (Figure 29, 30 and Table 25). Over the last ten years, proprietor income has increased by 71.9 percent in New Hanover, well outpacing the nation, the state, and both benchmark communities.

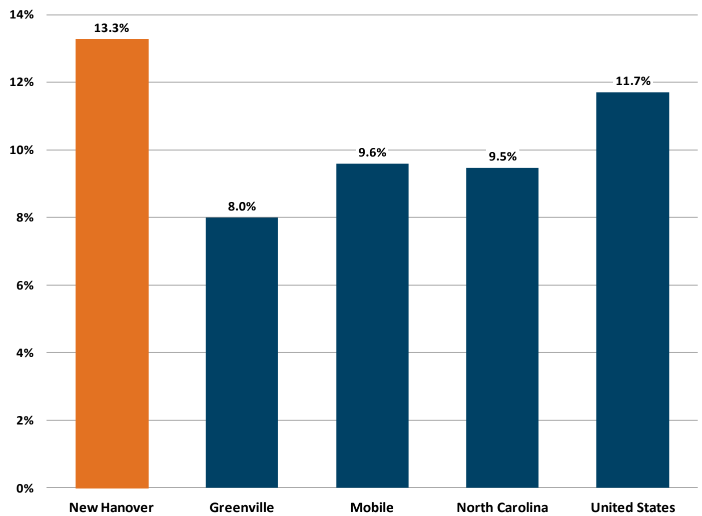
Self-employment accounts for 13.9 percent of all occupations in New Hanover, a proportion well above the nation, the state, and both benchmarks with percentages between 7.2 and 9.8 (Figure 31 and Table 26)

.

Figure 29

2012 Nonfarm Proprietor Income

As Percent of Total Earnings

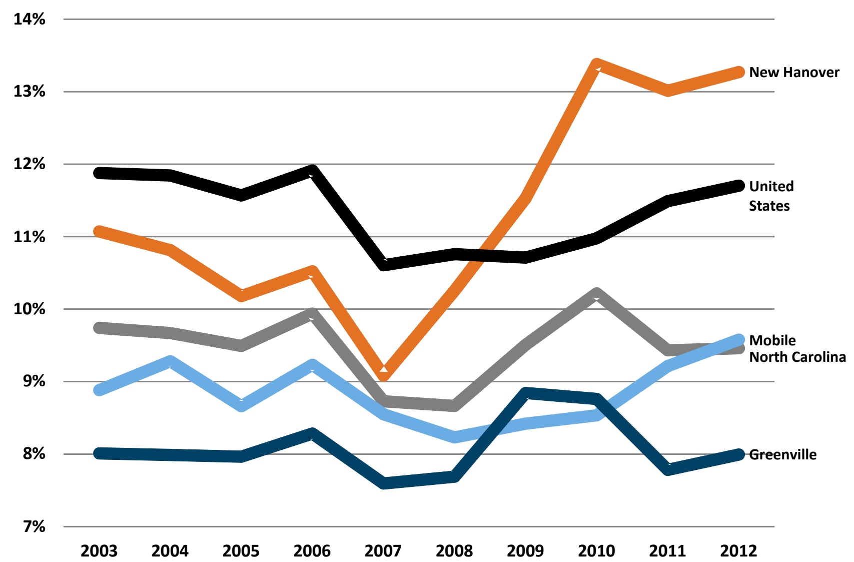


Source: US Bureau of Economic Analysis, Garner Economics

Figure 30

Nonfarm Proprietor Income

As Percent of Total Earnings



Source: US Bureau of Economic Analysis, Garner Economics

Table 25
Nonfarm Proprietor Income
Highest Relative Figures Shaded

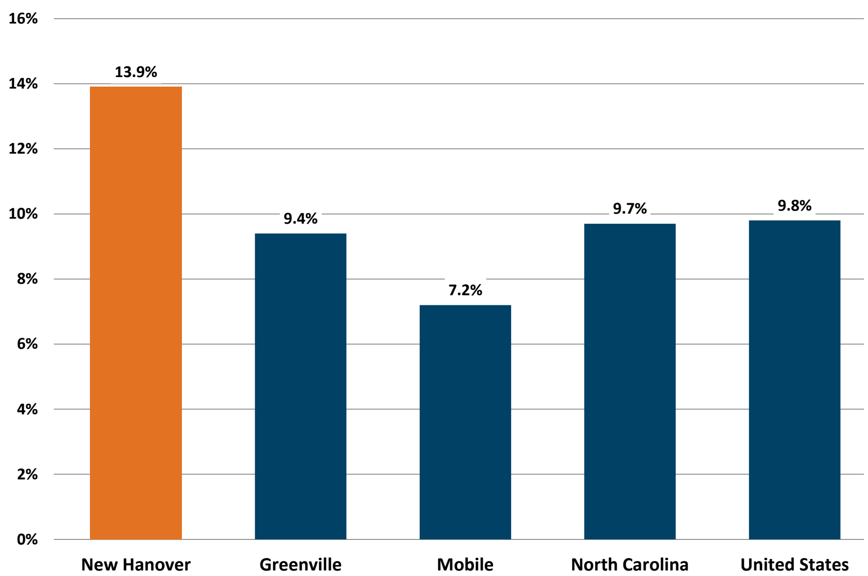
	2012 Percent Total Earnings	10-Year Percent Change
New Hanover	13.3%	71.9%
Greenville	8.0%	32.9%
Mobile	9.6%	44.3%
North Carolina	9.5%	34.4%
United States	11.7%	35.1%

Table 26
Self-employed
As Percentage of Total Occupations
2010-2012, 3-Year Annual Estimates
Employed Population, 16 Years and Over
(Highest relative percentages in shaded)

New Hanover	13.9%
Greenville	9.4%
Mobile	7.2%
North Carolina	9.7%
United States	9.8%

Source: US Census Bureau, Garner Economics

Figure 31
Self-employed
As Percentage of Total Occupations
Employed Population, 16 Years and Over
2010-2012, 3-Year Annual Estimates



Source: US Census Bureau, Garner Economics

Major Industry Sector Composition

A comparison of major industry employment composition provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness. New Hanover has a higher proportion of employment in six sectors: *Retail Trade*; *Professional and Technical Services*; Information; *Real Estate and Rental and Leasing*; Arts*, Entertainment, and Recreation;* and *Accommodations and Food Services* (Table 27). The area also has a higher relative proportion of employment in *State* and *Local Government*. A detailed analysis of New Hanover's industrial, occupational, and cluster specialization relative to the nation can be found in Section 6: Local Specialization, Competitiveness & Growth.

Table 27

Employment by Major Industry Sectors, Percentage of Total Annual 2012

(highest relative percentages in shaded)

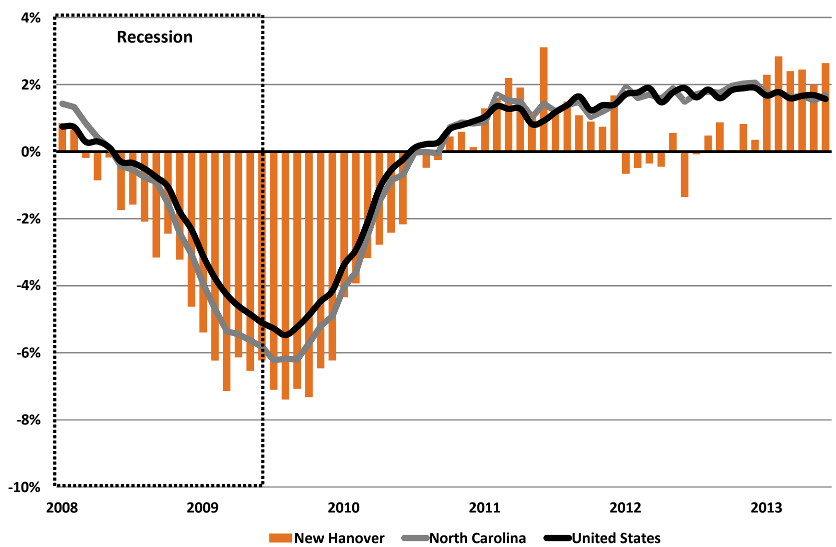
	New Hanover	Greenville	Mobile	NC	US
Federal Government	0.9%	0.8%	1.6%	1.8%	2.1%
State Government	4.7%	1.4%	4.5%	4.6%	3.4%
Local Government	12.5%	10.1%	9.5%	11.0%	10.4%
Private	81.8%	87.8%	84.5%	82.6%	84.0%
Agriculture, forestry	0.1%	0.1%	0.4%	0.7%	0.9%
Mining, Quarrying, Oil & Gas	0.0%	0.0%	0.3%	0.1%	0.6%
Utilities	0.3%	0.2%	0.5%	0.3%	0.4%
Construction	5.3%	3.7%	5.6%	4.4%	4.2%
Manufacturing	5.7%	11.9%	10.9%	11.3%	9.0%
Wholesale Trade	3.4%	5.2%	4.3%	4.4%	4.3%
Retail Trade	14.2%	11.3%	12.3%	11.5%	11.3%
Professional and Technical Services	6.5%	5.8%	5.1%	5.0%	6.0%
Management of Companies	0.8%	1.9%	0.4%	2.1%	1.5%
Administrative and Waste Services	5.4%	12.8%	6.5%	6.6%	6.1%
Educational Services	0.9%	2.0%	1.3%	1.7%	2.0%
Healthcare and Social Assistance	11.9%	9.1%	12.8%	11.9%	12.8%
Transportation and Warehousing	2.1%	3.7%	4.6%	2.7%	3.2%
Information	2.5%	2.5%	1.2%	1.8%	2.0%
Finance and Insurance	2.6%	3.3%	3.3%	3.8%	4.2%
Real Estate and Rental and Leasing	1.8%	1.4%	1.8%	1.2%	1.5%
Arts, Entertainment, and Recreation	1.7%	1.5%	0.8%	1.5%	1.5%
Accommodation and Food Services	14.0%	8.9%	8.7%	9.1%	8.9%

Source: US Bureau of Labor Statistics, Garner Economics

Total Employment

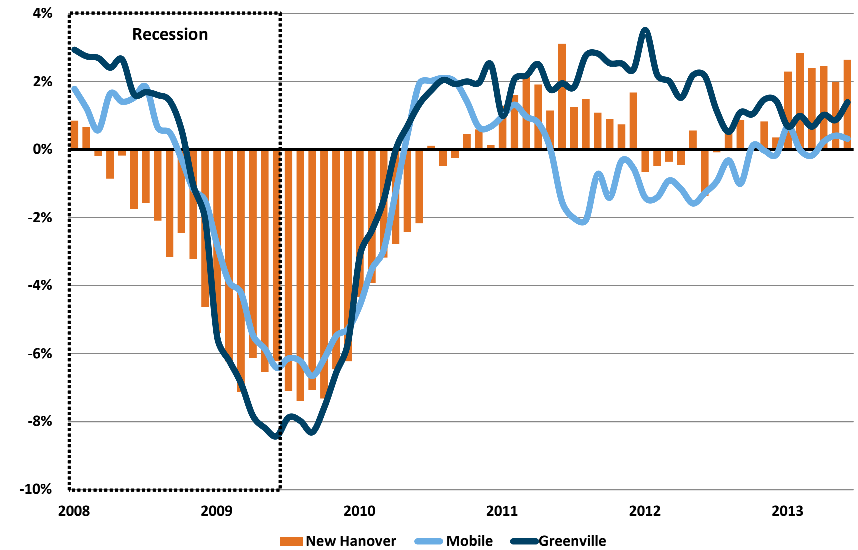
Over the most recent year, total employment in New Hanover is up, on average, 1.4 percent or 1,370 more jobs. The pace is above both benchmark communities but below the nation and the state (Figures 32 & 33 and Table 28). The recession led to a 7.4 percent job loss in New Hanover (-7,714 jobs), second only to Greenville in severity. Over the last five years, the average rate of job change is -1.3 percent in New Hanover, lower than the other geographies examined.

Figure 32
Total Employment
12-Month Percent Change



Source: US Bureau of Labor Statistics, Garner Economics

Figure 33
Total Employment
12-Month Percent Change



Source: US Bureau of Labor Statistics, Garner Economics

Table 28
2008-2013 2Q
Employment Trends
Highest Relative Number Shaded

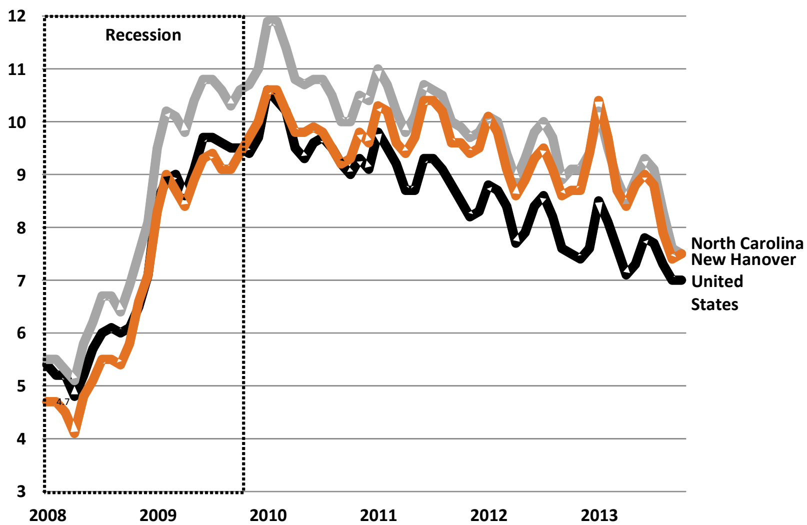
	New Hanover		Greenville	Mobile	North Carolina	United States
	Jobs	Percent				
Current 1-Year Average Job Growth Rate	1,370	1.4%	1.0%	-0.1%	1.8%	1.7%
5-Year Highest Percent Job Loss	(7,714)	-7.4%	-8.4%	-6.7%	-6.2%	-5.5%
5-Year Highest Job Growth Rate	2,964	3.1%	3.5%	2.1%	2.1%	1.9%
5-Year Average Annual Job Growth Rate	(1,340)	-1.3%	-0.2%	-1.1%	-0.5%	-0.3%

Source: US Bureau of Labor Statistics, Garner Economics

Unemployment

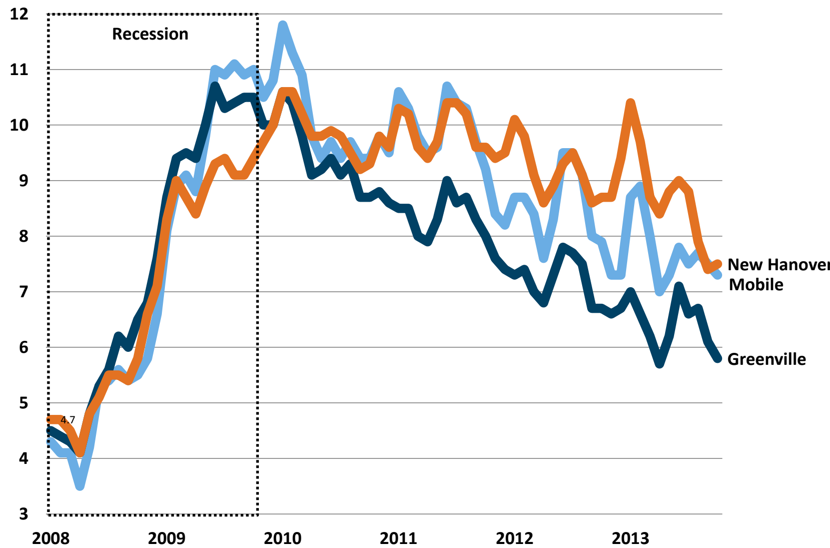
In New Hanover, the average unemployment rate over the last year has averaged 8.7 percent (representing 9,472 unemployed persons). The rate is above the nation and both benchmark communities (Figures 34 & 35 and Table 29). Over the last five years, the highest unemployment rate in New Hanover was 10.6 percent (representing 11,268 unemployed persons), a rate tied with the nation and below the state and both benchmark communities. Over the entire 2008-2013 3Q period, the average unemployment rate in New Hanover was 8.7 percent (representing 9,252 unemployed persons), a rate above the nation and both benchmark communities.

Figure 34
Unemployment Rate (%)



Source: US Bureau of Labor Statistics, Garner Economics

Figure 35
Unemployment Rate (%)



Source: US Bureau of Labor Statistics, Garner Economics

Table 29
2008-2013 (October)
Unemployment Trends (%)
Lowest Rates Shaded

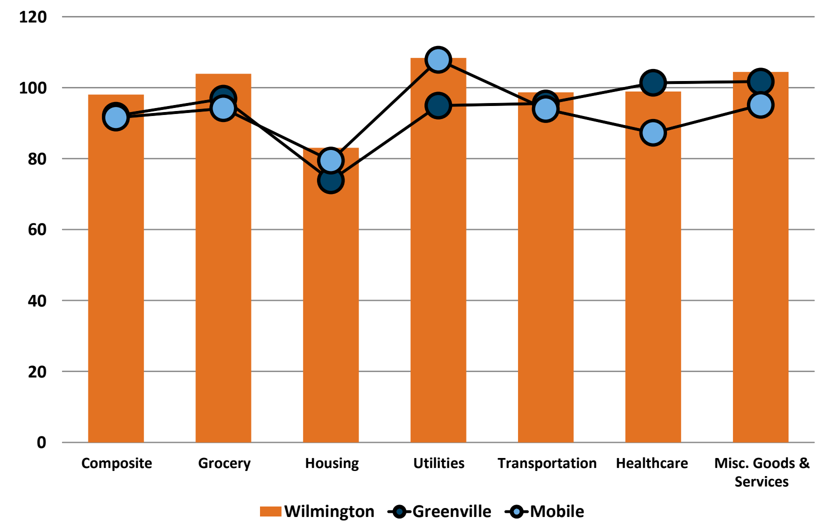
	New Hanover Unemployed	New Hanover Percent	Greenville	Mobile	North Carolina	United States
Past 1-Year Average Rate	9,472	8.7	6.4	7.7	8.9	7.5
5-Year Lowest Rate	4,312	4.1	4.1	3.5	5.1	4.8
5-Year Highest Rate	11,268	10.6	10.7	11.8	11.9	10.6
5-Year Average Rate	9,252	8.7	7.8	8.5	9.4	8.2

Source: US Bureau of Labor Statistics, Garner Economics

Cost of Living

At 98.0, the composite Cost-of-Living Index score in the Wilmington metro is below the nationwide index but slightly above both benchmark communities (Figure 36 and Table 30). Among the six individual categories, the Wilmington metro had the highest index numbers in all but Healthcare.

Figure 36
Cost of Living Index
2012 2Q- 2013 2Q Average



Source: ACCRA, Garner Economics

Table 30
Cost-of-Living Index
2012 2Q- 2013 2Q Average
Lowest relative number shaded.

	Composite	Grocery	Housing	Utilities	Transportation	Healthcare	Misc. Goods & Services
Wilmington	98.0	103.9	83.1	108.4	98.7	98.9	104.4
Greenville	92.0	96.9	73.8	94.9	95.5	101.3	101.7
Mobile	91.5	94.2	79.4	107.8	93.9	87.2	95.1

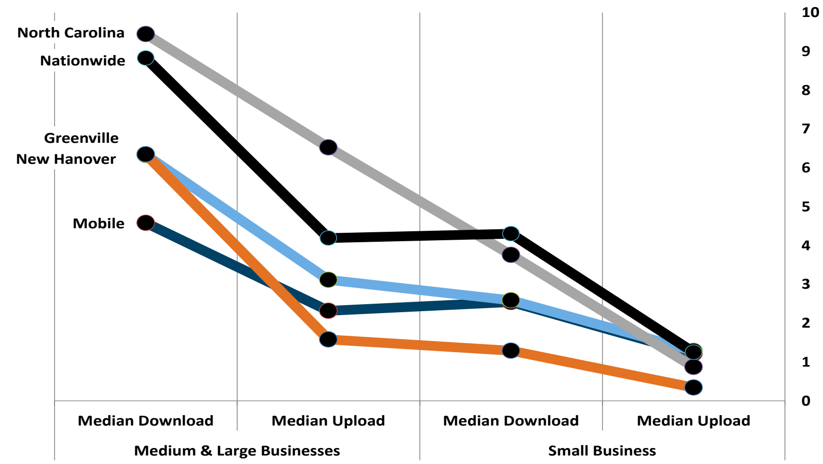
Source: ACCRA, Garner Economics

Broadband

Measured as the percentage of households that have availability to select broadband offerings, New Hanover places well, with DSL available to 94.4 percent and Cable available to 99.9 percent of households. Comparable broadband speeds available to businesses tested lower in three of four measures (Figure 37 and Table 31).

Figure 37

Broadband Speed 2012: Megabytes per Second (Mbps)



Source: National Telecommunications and Information Administration

Table 31

Broadband Availability & Speed 2012

Highest relative percentages shaded.

	New Hanover	Mobile	Greenville	North Carolina	Nationwide
Availability					
DSL	94.4%	91.1%	96.0%	88.6%	89.7%
Cable	99.9%	89.9%	99.0%	90.5%	88.6%
Speed: megabytes per second (Mbps)					
Medium & Large Businesses					
Median Download	6.35	4.58	6.33	9.44	8.83
Median Upload	1.58	2.32	3.12	6.53	4.19
Small Business					
Median Download	1.29	2.54	2.59	3.76	4.30
Median Upload	0.34	1.22	1.29	0.87	1.25

Source: National Telecommunications and Information Administration

Airport Statistics

Among major airports in the United States, *Wilmington International (ILM)* ranks 129th for the number of domestic passenger arrivals, 137th for scheduled flights, and 174th for the amount of freight/mail (Table 32). Greenville-Spartanburg International (GSP) is the top-ranking airport among the three examined.

Table 32
Key Airport Statistics
US Flights Only

	Passengers Arrivals		Scheduled Flights		Freight/Mail	
	(1,000's)	Rank*	#	Rank*	Mil lbs.	Rank*
Wilmington International (ILM)	381,000	129	7,701	137	3,525,000	174
Greenville-Spartanburg International (GSP)	916,000	87	18,063	88	59,000,000	86
Mobile Regional (MOB)	285,000	153	6,764	155	159,000	442

** Among 827 US airports, 12 months ending March 2013*
Source: US Department of Transportation, Garner Economics

Chapter 6: Local Specialization, Competitiveness & Growth

The following section provides a more detailed and in-depth assessment of the New Hanover economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities.

The three main areas of analysis are: **major industries**, **occupations,** and **industry clusters**. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

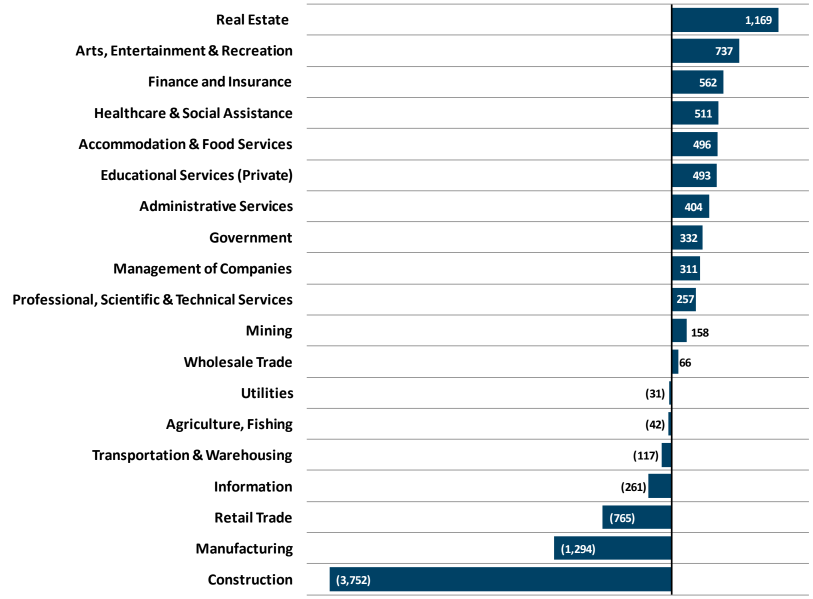
Major Industry Sector Change

Over the last five years, the largest absolute employment gains came from *Real Estate* (up 1,169 jobs or 14 percent) (Figure 38 and Table 33). Other significant gains were made in *Arts, Entertainment & Recreation* (up 737 jobs or 25 percent) and *Finance and Insurance* (up 562 jobs or 25 percent). The greatest job losses have come from the *Construction* industry sector, down 3,752 jobs or 34 percent. The majority remaining absolute losses came from *Manufacturing* (down 1,294 jobs or 18 percent) and *Retail Trade* (down 765 jobs or 5 percent). Of nineteen major industry groups, losses were concentrated in seven.

Figure 38

Employment Change by Major Industry

New Hanover 2008-2013 3Q



Source: Economic Modeling Specialist, Garner Economics

Chapter Data

Table 33
Employment Change by Major Industry
New Hanover 2008-2013 3Q

Major Industry Sector	2013 3Q Jobs	Employment Change #	Employment Change %
Real Estate	9,399	1,169	14%
Arts, Entertainment & Recreation	3,683	737	25%
Finance and Insurance	5,551	562	11%
Healthcare & Social Assistance	13,188	511	4%
Accommodation & Food Services	14,587	496	4%
Educational Services (Private)	1,914	493	35%
Administrative Services	7,303	404	6%
Government	19,295	332	2%
Management of Companies	836	311	59%
Professional, Scientific & Technical Services	9,418	257	3%
Mining	246	158	180%
Wholesale Trade	3,598	66	2%
Utilities	254	(31)	-11%
Agriculture, Fishing	314	(42)	-12%
Transportation & Warehousing	2,782	(117)	-4%
Information	2,963	(261)	-8%
Retail Trade	15,420	(765)	-5%
Manufacturing	5,877	(1,294)	-18%
Construction	7,249	(3,752)	-34%

Source: Economic Modeling Specialist, Garner Economics

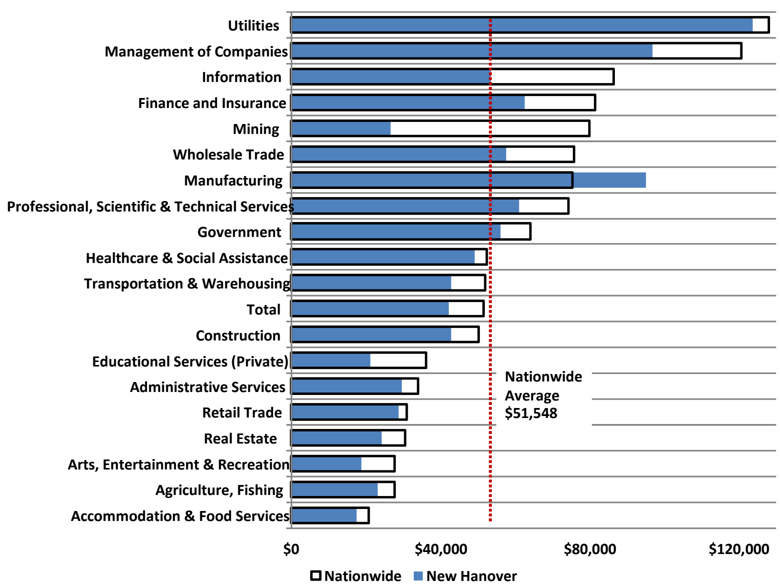
Industry Earnings

A comparison of New Hanover's average industry earnings to national averages may offer insights into areas of unique expertise or cost-saving opportunities. New Hanover's industrial average earnings exceed the national same-industry average in only one industry: *Manufacturing* (Figure 39 and Table 34). Double-digit percentage earnings gaps, where New Hanover's industry averages are notably lower than in the nation, exist in 14 of 19 major industry sectors.

Figure 39

Average Annual Industry Earnings Comparison

2013 3Q



Source: Economic Modeling Specialist, Garner Economics

Table 34

Average Annual Industry Earnings Comparison

2013 2Q

	New Hanover	US	Difference (%)
Utilities	$123,839	$128,090	-3.4%
Management of Companies	$96,807	$120,678	-24.7%
Information	$53,413	$86,500	-61.9%
Finance and Insurance	$62,554	$81,497	-30.3%
Mining	$26,498	$79,954	-201.7%
Wholesale Trade	$57,672	$75,799	-31.4%
Manufacturing	$95,130	$75,348	20.8%
Professional, Scientific & Technical Services	$60,975	$74,360	-22.0%
Government	$56,087	$64,135	-14.3%
Healthcare & Social Assistance	$49,135	$52,436	-6.7%
Transportation & Warehousing	$42,928	$51,884	-20.9%
Total	**$42,289**	**$51,548**	**-21.9%**
Construction	$42,952	$50,173	-16.8%
Educational Services (Private)	$21,238	$36,144	-70.2%
Administrative Services	$29,594	$34,012	-14.9%
Retail Trade	$28,666	$30,865	-7.7%
Real Estate	$24,135	$30,537	-26.5%
Arts, Entertainment & Recreation	$18,783	$27,692	-47.4%
Agriculture, Fishing	$23,028	$27,659	-20.1%
Accommodation & Food Services	$17,428	$20,710	-18.8%

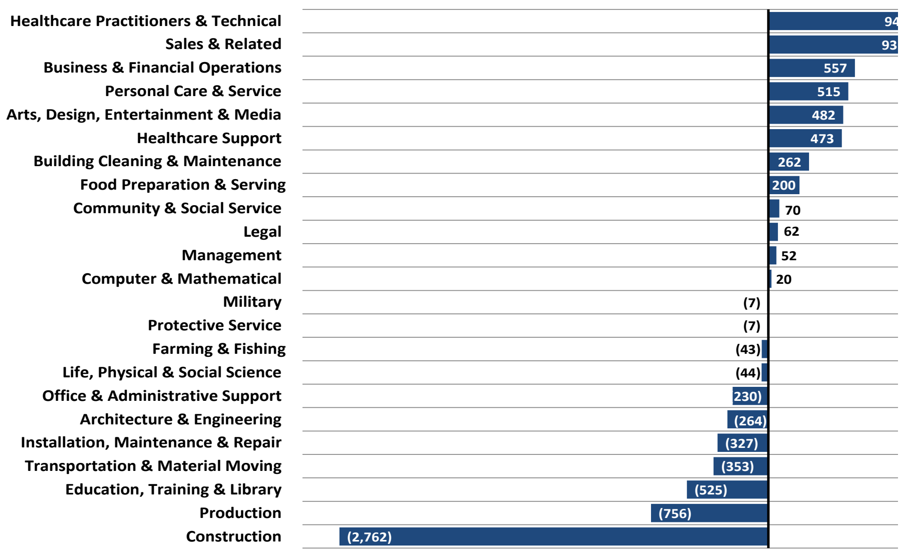
Source: Economic Modeling Specialist, Garner Economics

Major Occupational Change

Over the last five years, the largest absolute occupational gains came from *Healthcare Practitioners & Technical* (up 949 jobs or 15 percent) (Figure 40 and Table 35). Other significant gains were made in *Sales & Related* (up 931 jobs or 5 percent) and *Business & Financial Operations* (up 557 jobs or 10 percent). The greatest job losses have come from the *Construction* occupational group, down 2,762 jobs or 33 percent. The majority remaining absolute losses came from *Production* (down 756 jobs or 13 percent). Of 23 major occupational groups, losses were concentrated in 11.

Figure 40

Employment Change by Major Occupational Group
New Hanover 2008-2011 3Q



Source: Economic Modeling Specialist, Garner Economics

Table 35

Employment Change by Major Occupational Group
New Hanover 2008-2013 2Q

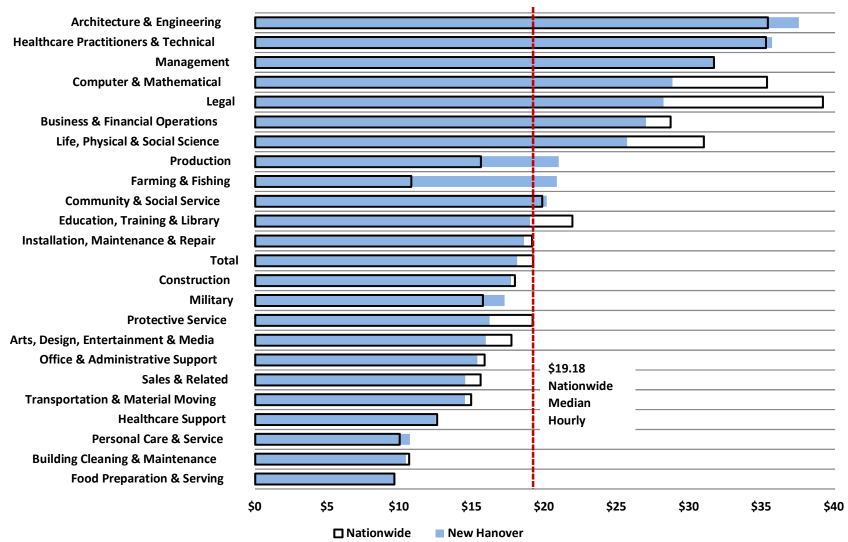
Major Occupational Groups	2013 3Q Jobs	Employment Change #	Employment Change %
Healthcare Practitioners & Technical	7,328	949	15%
Sales & Related	20,980	931	5%
Business & Financial Operations	6,002	557	10%
Personal Care & Service	5,200	515	11%
Arts, Design, Entertainment & Media	3,741	482	15%
Healthcare Support	4,783	473	11%
Building Cleaning & Maintenance	5,837	262	5%
Food Preparation & Serving	13,264	200	2%
Community & Social Service	1,668	70	4%
Legal	1,066	62	6%
Management	6,988	52	1%
Computer & Mathematical	1,718	20	1%
Military	671	(7)	-1%
Protective Service	2,638	(7)	0%
Farming & Fishing	231	(43)	-16%
Life, Physical & Social Science	1,356	(44)	-3%
Office & Administrative Support	17,100	(230)	-1%
Architecture & Engineering	1,973	(264)	-12%
Installation, Maintenance & Repair	4,842	(327)	-6%
Transportation & Material Moving	6,200	(353)	-5%
Education, Training & Library	6,340	(525)	-8%
Production	4,977	(756)	-13%
Construction	5,606	(2,762)	-33%

Source: Economic Modeling Specialist, Garner Economics

Occupational Earnings

A comparison of New Hanover's average same-occupational earnings to national averages may offer insights into areas of unique expertise or cost-saving opportunities. New Hanover's occupational average earnings exceed the national average in 8 out of 23 groups (Figure 41 and Table 36). Of significance, earnings in *Production* occupations are 25.6 percent above the national average and *Architecture & Engineering* occupations are 5.7 percent above. Earnings gaps, where New Hanover's averages are notably lower than the nation's, exist in the *Legal, Physical & Social Science* and *Computer & Mathematical* occupations.

Figure 41
Median Hourly Occupational
Earnings Comparison
2013 3Q



Source: Economic Modeling Specialist, Garner Economics

Table 36
Median Hourly Occupational
Earnings Comparison
2013 3Q

Major Occupational Groups	New Hanover	US	Difference
Architecture & Engineering	$37.52	$35.38	5.7%
Healthcare Practitioners & Technical	$35.67	$35.25	1.2%
Management	$31.63	$31.66	-0.1%
Computer & Mathematical	$28.80	$35.32	-22.6%
Legal	$28.18	$39.18	-39.0%
Business & Financial Operations	$26.97	$28.67	-6.3%
Life, Physical & Social Science	$25.66	$30.96	-20.7%
Production	$20.94	$15.57	25.6%
Farming & Fishing	$20.82	$10.76	48.3%
Community & Social Service	$20.11	$19.80	1.5%
Education, Training & Library	$18.97	$21.88	-15.3%
Installation, Maintenance & Repair	$18.55	$19.11	-3.0%
Total	**$18.08**	**$19.18**	**-6.1%**
Construction	$17.65	$17.92	-1.5%
Military	$17.20	$15.71	8.7%
Protective Service	$16.17	$19.14	-18.4%
Arts, Design, Entertainment & Media	$15.91	$17.68	-11.1%
Office & Administrative Support	$15.33	$15.83	-3.3%
Sales & Related	$14.49	$15.56	-7.4%
Transportation & Material Moving	$14.47	$14.90	-3.0%
Healthcare Support	$12.46	$12.55	-0.7%
Personal Care & Service	$10.68	$9.97	6.6%
Building Cleaning & Maintenance	$10.39	$10.62	-2.2%
Food Preparation & Serving	$9.65	$9.60	0.5%

Source: Economic Modeling Specialist, Garner Economics

Understanding Bubble/Scatter Charts

The following assessment tools include a series of bubble/scatter charts and tables. Axis and quadrant labels should be read as only general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart and table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

Chart axis definitions:

- **Specialization**: measured using location quotient (LQ).[1] Reflects the level of relative concentration of a particular occupation/industry/cluster in New Hanover to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc. that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry or cluster nationwide. For example, if hospital employment grew by 5 percent nationwide in 2009, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating local unique performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

- **At-Risk:** Locally specialized and recent local job losses.
- **Declining:** Not locally specialized and recent local job losses.
- **Competitive:** Locally specialized and recent local job gains.
- **Emerging:** Not locally specialized and recent local job gains.
- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

*See Specialization note on following page. Detailed occupational and industry information for New Hanover can be found in the **Appendices.**

Industry Cluster Specialization & Growth

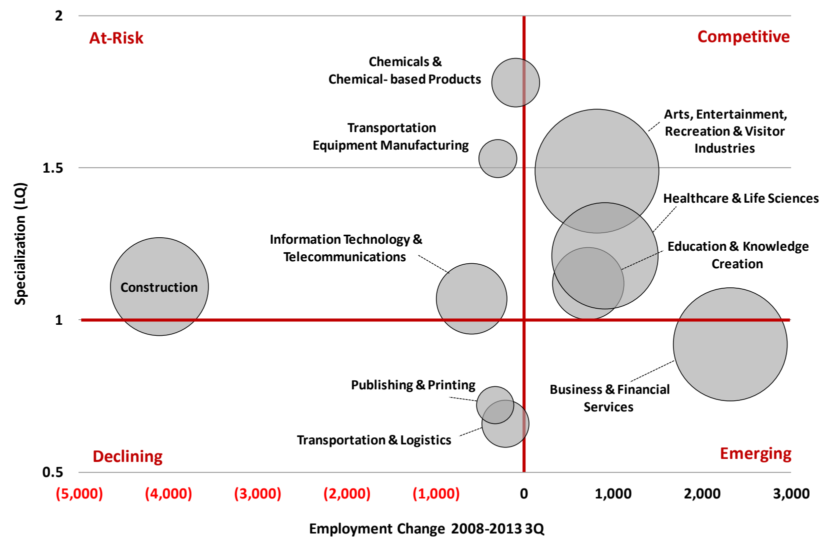
Industry clusters are geographic concentrations of interconnected businesses, suppliers, and associated institutions in a particular field. Clusters are considered to increase the productivity with which companies can compete, nationally and globally. For the analysis, we start with cluster definitions developed by the Purdue Center for Regional Development and the Indiana Business Research Center at Indiana University's Kelley School of Business through work funded by the US Commerce Department's Economic Development Administration. Garner Economics adjusts cluster components to better match the location and particular economic situation.

Observations: The *Arts, Entertainment, Recreation & Visitor Industries* cluster has experienced strong growth (up 817 jobs over the last five years) and has a high degree of local specialization, (location quotient of 1.49). Two other clusters with strong growth and high specialization are *Healthcare & Life Sciences* and *Education & Knowledge Creation* (Figure 42 and Table 37). The *Business & Financial Services* cluster experienced the highest absolute number of new jobs created; yet it does not exhibit a high degree of local specialization.

Figure 42

Cluster Specialization & Growth

New Hanover



Size of the bubble represents total employment.
Source: Economic Modeling Specialist, Garner Economics

Note on Specialization: To measure local specialization, location quotients (LQs) for each occupation, industry, or cluster are derived. LQs are ratios of an area's distribution of employment for a specific occupation/industry/cluster compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Table 37
Cluster Specialization & Growth
New Hanover

Cluster	Five-Year Job Change	LQ	2013 3Q Jobs
Competitive			
Arts, Entertainment, Recreation & Visitor Industries	817	1.49	17,688
Education & Knowledge Creation	719	1.12	5,942
Healthcare & Life Sciences	904	1.21	12,993
Emerging			
Business & Financial Services	2,312	0.92	14,859
At-Risk			
Chemicals & Chemical-based Products	(93)	1.78	2,696
Transportation Equipment Manufacturing	(291)	1.53	1,659
Construction	(4,092)	1.11	11,000
Information Technology & Telecommunications	(589)	1.07	5,640
Declining			
Publishing & Printing	(323)	0.72	1,592
Transportation & Logistics	(208)	0.66	2,557

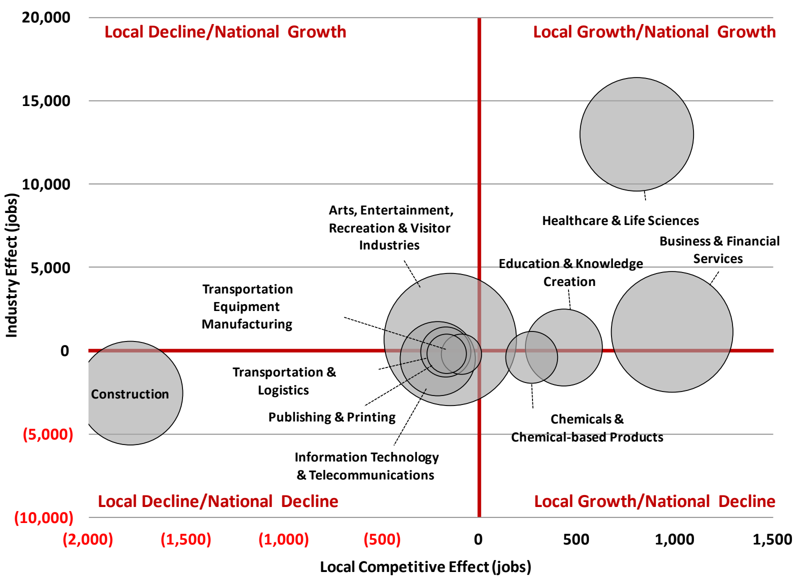
Source: Economic Modeling Specialist, Garner Economics

Industry Cluster Competitiveness

The Competitiveness Screen seeks to reveal local competitive advantages (i.e. unique growth beyond what industry trends would achieve).

Observations: Four clusters exhibit job growth generated from a local competitive effect: *Business & Financial Services*, *Healthcare & Life Sciences, Education & Knowledge Creation,* and *Chemicals & Chemical-based Products* (Figure 43 and Table 38).

Figure 43
Cluster Relative Components of Growth
2008-2013 3Q
New Hanover



Size of the bubble represents total employment.
Source: Economic Modeling Specialist, Garner Economics

Table 38
Cluster Relative Components of Growth
2008-2013 3Q
New Hanover

Cluster	Local Effect	Industry Effect	2013 3Q Jobs
Local Growth/National Growth			
Business & Financial Services	984	1,120	14,859
Healthcare & Life Sciences	802	12,993	12,993
Education & Knowledge Creation	430	202	5,942
Local Growth/National Decline			
Chemicals & Chemical-based Products	267	-407	2,696
Local Decline/National Growth			
Arts, Entertainment, Recreation & Visitor Industries	-150	687	17,688
Local Decline/National Decline			
Transportation & Logistics	-173	-81	2,557
Publishing & Printing	-168	-187	1,592
Transportation Equipment Manufacturing	-92	-231	1,659
Information Technology & Telecommunications	-215	-477	5,640
Construction	-1,786	-2,557	11,000

Source: Economic Modeling Specialist, Garner Economics

Industry Sector Specialization & Growth

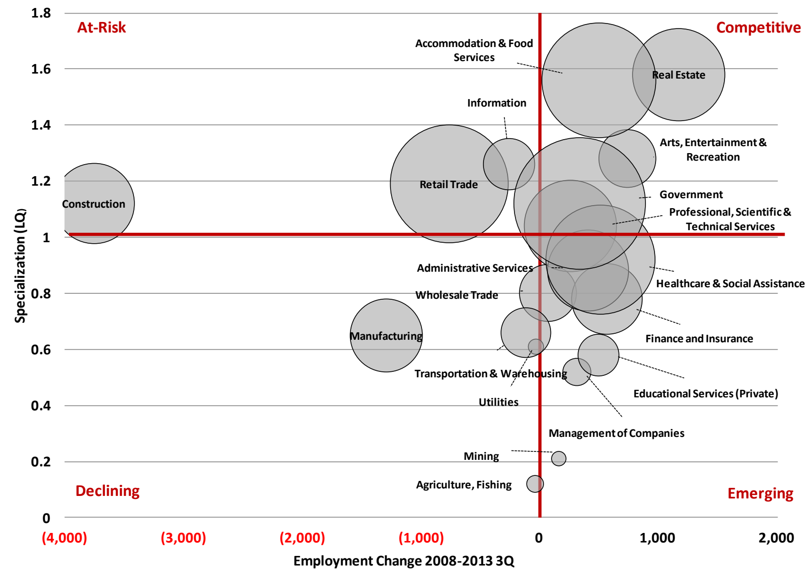
Industry sectors are the standard industrial classifications used by government agencies based primarily on the grouping of similar final products or services. Unlike clusters, industries within the same classification groupings don't necessarily share a high degree of connectedness. This screen is similar to the cluster screen, only utilizing the standard NAICS classifications.

Observations: Two industry sectors stand out with high local specialization and strong recent growth: *Real Estate* and *Accommodation & Food Services* (Figure 44 and Table 39).

Figure 44

Industry Specialization & Growth

Hew Hanover



Size of the bubble represents total employment.

Source: Economic Modeling Specialist, Garner Economics

Table 39
Industry Specialization & Growth
New Hanover

Industry Sector	Five Year Change	LQ	20113 3Q Jobs
Competitive			
Real Estate	1,169	1.58	9,399
Arts, Entertainment & Recreation	737	1.28	3,683
Accommodation & Food Services	496	1.56	14,587
Government	332	1.12	19,295
Professional, Scientific & Technical Services	257	1.04	9,418
Emerging			
Finance and Insurance	562	0.78	5,551
Healthcare & Social Assistance	511	0.92	13,188
Educational Services (Private)	493	0.58	1,914
Administrative Services	404	0.88	7,303
Management of Companies	311	0.52	836
Mining	158	0.21	246
Wholesale Trade	66	0.8	3,598
At-Risk			
Information	(261)	1.26	2,963
Retail Trade	(765)	1.19	15,420
Construction	(3,752)	1.12	7,249
Declining			
Utilities	(31)	0.61	254
Agriculture, Fishing	(42)	0.12	314
Transportation & Warehousing	(117)	0.66	2,782
Manufacturing	(1,294)	0.65	5,877

Source: Economic Modeling Specialist, Garner Economics

Industry Sector Competitiveness

The Competitiveness Screen seeks to reveal local competitive advantages (i.e. unique growth beyond what industry trends would achieve).

Observations: A strong local competitive effect is exhibited in three industry sectors: *Real Estate; Arts, Entertainment & Recreation*; and *Government* (Figure 45 and Table 40).

Table 40

New Hanover Industry Relative Components of Growth: 2008-2013 3Q

Industry Sector	Competitive Effect	Industry Effect	2013 2Q Jobs
Local Growth/National Growth			
Real Estate	509	523	9,399
Finance and Insurance	102	378	5,551
Educational Services (Private)	267	203	1,914
Arts, Entertainment & Recreation	543	144	3,683
Mining	126	31	246
Management of Companies	272	30	836
Local Growth/National Decline			
Wholesale Trade	176	(169)	3,598
Government	710	(693)	19,295
Local Decline/National Decline			
Healthcare & Social Assistance	(649)	950	13,188
Accommodation & Food Services	(476)	738	14,587
Administrative Services	(196)	485	7,303
Professional, Scientific & Technical Services	(125)	229	9,418
Local Decline/National Decline			
Agriculture, Fishing	(41)	(7)	314
Utilities	(24)	(12)	254
Transportation & Warehousing	(124)	(42)	2,782
Information	(2)	(312)	2,963
Retail Trade	(503)	(531)	15,420
Manufacturing	(560)	(853)	5,877
Construction	(1,870)	(2,064)	7,249

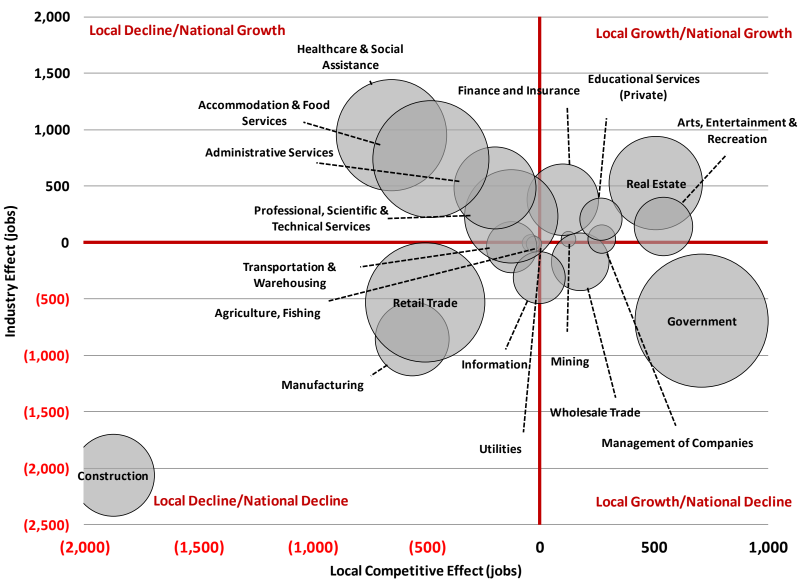
Source: Economic Modeling Specialist, Garner Economics

Figure 45

Industry Relative Components of Growth

2008-2013 3Q

New Hanover



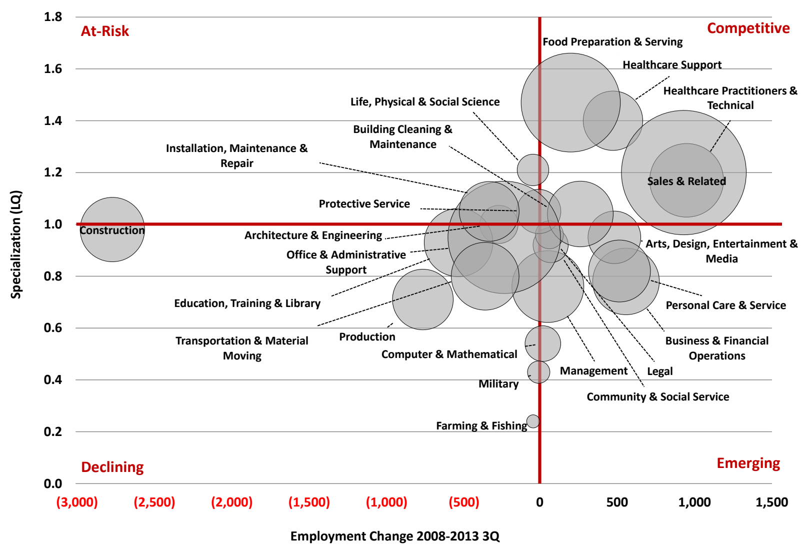
Size of the bubble represents total employment.
Source: Economic Modeling Specialist, Garner Economics

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications. The groupings do not necessarily reflect any specific industry sectors or clusters.

Observations: Four occupational groups share high specialization and strong growth: *Food Preparation & Serving*, *Healthcare Support*, *Sales & Related,* and *Healthcare Practitioners & Technical* (Figure 46 and Table 41).

Figure 46
Occupational Specialization & Growth
New Hanover



Size of the bubble represents total employment.
Source: Economic Modeling Specialist, Garner Economics

Table 41
Occupational Specialization & Growth
New Hanover

Occupational Group	Five Year Change	LQ	2013 3Q Jobs
Competitive			
Healthcare Practitioners & Technical	949	1.19	7,328
Sales & Related	931	1.22	20,980
Healthcare Support	473	1.42	4,783
Building Cleaning & Maintenance	262	1.06	5,837
Food Preparation & Serving	200	1.49	13,264
Emerging			
Business & Financial Operations	557	0.80	6,002
Personal Care & Service	515	0.84	5,200
Arts, Design, Entertainment & Media	482	0.97	3,741
Community & Social Service	70	0.94	1,668
Legal	62	0.98	1,066
Management	52	0.78	6,988
Computer & Mathematical	20	0.56	1,718
At-Risk			
Protective Service	(7)	1.07	2,638
Life, Physical & Social Science	(44)	1.23	1,356
Architecture & Engineering	(264)	1.02	1,973
Installation, Maintenance & Repair	(327)	1.07	4,842
Declining			
Military	(7)	0.45	671
Farming & Fishing	(43)	0.26	231
Office & Administrative Support	(230)	0.97	17,100
Transportation & Material Moving	(353)	0.82	6,200
Education, Training & Library	(525)	0.95	6,340
Production	(756)	0.73	4,977
Construction	(2,762)	1.00	5,606

Source: Economic Modeling Specialist, Garner Economics

About Our Company

Garner Economics, LLC provides innovative economic and community development solutions in a competitive global market. We offer site selection, analytical research, industry targeting, strategic planning, and organizational development with a wealth of expertise to companies, communities, and organizations globally. Garner Economics is based in Atlanta, GA and has representative offices in both Europe and Asia.

Since 2003, our team has been headed by Jay Garner, a 34-year internationally recognized expert in the economic development, chamber of commerce, and site-location consulting professions and rounded out by talented experts with CEcD, CCE, and CFRE designations and a nationally known research economist.

Tom Tveidt, research economics for Garner Economics, served as the author of the economic and labor analysis. Tina Valdecanas, Senior Associate and Strategist for Garner Economics, led the stakeholder input sessions and analysis. Jay Garner conducted the Assets and Challenges Assessment.

Appendices

I. New Hanover Industry Sector Details – 2013 2Q

Highly specialized industries (LQ greater than 1.20) or high relative earnings (above $42,289, the average earnings per worker in New Hanover) are highlighted in green.

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Agriculture, Forestry, Fishing, and Hunting	**314**	**(42)**	**0.12**	**$23,028**
Crop Production	**103**	**(14)**	**0.10**	**$25,256**
Animal Production	**25**	**--**	**0.03**	**$30,549**
Forestry and Logging	**20**	**(12)**	**0.29**	**$24,080**
Fishing, Hunting, and Trapping	**107**	**(38)**	**1.51**	**$19,332**
Fishing	106	(35)	1.79	$19,436
Support Activities for Agriculture and Forestry	**59**	**7**	**0.12**	**$22,386**
Support Activities for Crop Production	40	23	0.11	$15,590
Support Activities for Animal Production	10	(14)	0.14	$13,318
Mining, Quarrying, and Oil and Gas Extraction	**246**	**158**	**0.21**	**$26,498**
Oil and Gas Extraction	**215**	**151**	**0.32**	**$22,534**
Mining (except Oil and Gas)	**30**	**8**	**0.15**	**$55,000**
Nonmetallic Mineral Mining and Quarrying	30	8	0.34	$55,000
Utilities	**254**	**(31)**	**0.61**	**$123,839**
Electric Power Generation, Transmission, and Distribution	151	(117)	0.52	$135,590
Natural Gas Distribution	87	--	1.05	$117,783
Water, Sewage, and Other Systems	16	0	0.37	$44,458
Construction	**7,249**	**(3,752)**	**1.12**	**$42,952**
Construction of Buildings	**1,661**	**(535)**	**1.18**	**$49,117**
Residential Building Construction	1,092	(425)	1.31	$49,266
Nonresidential Building Construction	568	(112)	0.99	$48,831
Heavy and Civil Engineering Construction	**786**	**13**	**1.05**	**$51,466**
Utility System Construction	391	145	1.13	$46,289
Land Subdivision	114	(54)	2.03	$61,841
Highway, Street, and Bridge Construction	68	30	0.29	$49,748
Other Heavy and Civil Engineering Construction	213	(107)	1.93	$55,997
Specialty Trade Contractors	**4,803**	**(3,228)**	**1.12**	**$39,427**

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Foundation, Structure, and Building Exterior Contractors	606	(431)	0.80	$39,046
Building Equipment Contractors	2,394	(660)	1.52	$46,691
Building Finishing Contractors	1,098	(1,926)	1.04	$30,026
Other Specialty Trade Contractors	704	(212)	0.78	$29,714
Manufacturing	**5,877**	**(1,294)**	**0.65**	**$95,130**
Food Mfg.	**108**	**(12)**	**0.10**	**$19,245**
Bakeries and Tortilla Mfg.	66	(1)	0.31	$14,782
Other Food Mfg.	21	0	0.16	$21,353
Beverage and Tobacco Product Mfg.	**55**	**(23)**	**0.37**	**$48,094**
Beverage Mfg.	55	(23)	0.39	$48,094
Textile Mills	**35**	**(77)**	**0.39**	**$36,592**
Textile and Fabric Finishing and Fabric Coating Mills	28	(9)	1.04	$31,537
Textile Product Mills	**28**	**(41)**	**0.30**	**$25,955**
Textile Furnishings Mills	15	(14)	0.39	$18,964
Other Textile Product Mills	12	(28)	0.24	$34,681
Apparel Mfg.	**49**	**39**	**0.36**	**$26,632**
Cut and Sew Apparel Mfg.	24	--	0.22	$24,992
Apparel Accessories and Other Apparel Mfg.	16	--	1.17	$31,575
Wood Product Mfg.	**173**	**(130)**	**0.61**	**$46,733**
Veneer, Plywood, and Engineered Wood Product Mfg.	73	(75)	1.47	$48,875
Other Wood Product Mfg.	97	(51)	0.59	$46,236
Paper Mfg.	**13**	**(173)**	**0.05**	**$118,064**
Pulp, Paper, and Paperboard Mills	12	(12)	0.16	$121,969
Printing and Related Support Activities	**147**	**(98)**	**0.39**	**$25,189**
Printing and Related Support Activities	147	(98)	0.39	$25,189
Chemical Mfg.	**1,211**	**31**	**2.07**	**$111,963**
Basic Chemical Mfg.	408	(8)	3.90	$109,096
Pharmaceutical and Medicine Mfg.	77	20	0.39	$123,483
Other Chemical Product and Preparation Mfg.	716	166	11.35	$112,059
Nonmetallic Mineral Product Mfg.	**1,274**	**(127)**	**4.43**	**$97,086**
Clay Product and Refractory Mfg.	15	--	0.43	$33,895
Glass and Glass Product Mfg.	1,101	(32)	17.13	$102,173
Cement and Concrete Product Mfg.	91	(29)	0.73	$47,527
Lime and Gypsum Product Mfg.	52	(57)	5.06	$109,563

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Other Nonmetallic Mineral Product Mfg.	14	(16)	0.27	$41,960
Fabricated Metal Product Mfg.	**387**	**(78)**	**0.37**	**$54,643**
Architectural and Structural Metals Mfg.	114	(32)	0.44	$47,445
Boiler, Tank, and Shipping Container Mfg.	113	95	1.63	$61,984
Spring and Wire Product Mfg.	31	(11)	1.00	$78,923
Machine Shops; Turned Product; and Screw, Nut, and Bolt Mfg.	57	4	0.21	$41,196
Coating, Engraving, Heat Treating, and Allied Activities	54	8	0.54	$52,325
Machinery Mfg.	**307**	**(281)**	**0.38**	**$67,728**
Agriculture, Construction, and Mining Machinery Mfg.	61	(151)	0.33	$76,863
Industrial Machinery Mfg.	40	(13)	0.50	$56,308
Commercial and Service Industry Machinery Mfg.	12	(40)	0.19	$93,309
Metalworking Machinery Mfg.	38	(55)	0.27	$52,091
Engine, Turbine, and Power Transmission Equipment Mfg.	76	(36)	1.03	$66,063
Other General Purpose Machinery Mfg.	81	19	0.43	$71,464
Computer and Electronic Product Mfg.	**25**	**(1)**	**0.03**	**$45,208**
Navigational, Measuring, Electromedical, and Control Instruments Mfg.	23	7	0.08	$45,313
Electrical Equipment, Appliance, and Component Mfg.	**16**	**--**	**0.06**	**$34,349**
Other Electrical Equipment and Component Mfg.	11	11	0.12	$43,797
Transportation Equipment Mfg.	**1,659**	**(291)**	**1.53**	**$130,054**
Motor Vehicle Parts Mfg.	215	25	0.59	$78,900
Aerospace Product and Parts Mfg.	1,418	(300)	4.02	$138,974
Ship and Boat Building	25	(13)	0.25	$66,172
Furniture and Related Product Mfg.	**68**	**(54)**	**0.24**	**$43,005**
Household and Institutional Furniture and Kitchen Cabinet Mfg.	53	(52)	0.30	$44,826
Office Furniture (including Fixtures) Mfg.	16	(1)	0.21	$36,954
Miscellaneous Mfg.	**310**	**50**	**0.63**	**$49,626**
Medical Equipment and Supplies Mfg.	55	18	0.24	$55,388
Other Miscellaneous Mfg.	255	32	0.97	$48,379
Wholesale Trade	**3,598**	**66**	**0.80**	**$57,672**
Merchant Wholesalers, Durable Goods	**1,972**	**(74)**	**0.88**	**$55,343**
Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	235	53	0.95	$42,749
Furniture and Home Furnishing Merchant Wholesalers	64	9	0.79	$52,028
Lumber and Other Construction Materials Merchant Wholesalers	252	(22)	1.78	$52,922
Professional and Commercial Equipment and Supplies Merchant Wholesalers	460	50	1.01	$62,047

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Metal and Mineral (except Petroleum) Merchant Wholesalers	23	(71)	0.25	$70,676
Electrical and Electronic Goods Merchant Wholesalers	122	22	0.51	$56,636
Hardware, and Plumbing and Heating Equipment, and Supplies Merchant Wholesalers	243	(30)	1.46	$56,279
Machinery, Equipment, and Supplies Merchant Wholesalers	370	(47)	0.76	$60,718
Miscellaneous Durable Goods Merchant Wholesalers	204	(37)	0.62	$45,443
Merchant Wholesalers, Nondurable Goods	**1,305**	**73**	**0.83**	**$56,143**
Paper and Paper Product Merchant Wholesalers	98	(26)	1.06	$94,749
Drugs and Druggists' Sundries Merchant Wholesalers	22	3	0.16	$60,872
Apparel, Piece Goods, and Notions Merchant Wholesalers	52	(2)	0.41	$26,025
Grocery and Related Product Merchant Wholesalers	408	31	0.74	$43,199
Chemical and Allied Products Merchant Wholesalers	122	40	1.30	$71,553
Petroleum and Petroleum Products Merchant Wholesalers	86	(22)	1.21	$86,611
Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	380	43	2.85	$55,822
Miscellaneous Nondurable Goods Merchant Wholesalers	134	12	0.45	$45,833
Wholesale Electronic Markets and Agents and Brokers	**321**	**67**	**0.46**	**$78,198**
Wholesale Electronic Markets and Agents and Brokers	321	67	0.46	$78,198
Retail Trade	**15,420**	**(765)**	**1.19**	**$28,666**
Motor Vehicle and Parts Dealers	**2,137**	**(347)**	**1.49**	**$48,384**
Automobile Dealers	1,408	(279)	1.57	$55,537
Other Motor Vehicle Dealers	243	(109)	1.91	$37,799
Automotive Parts, Accessories, and Tire Stores	485	40	1.19	$32,931
Furniture and Home Furnishings Stores	**501**	**(98)**	**1.43**	**$32,798**
Furniture Stores	228	(56)	1.38	$39,892
Home Furnishings Stores	273	(41)	1.49	$26,890
Electronics and Appliance Stores	**385**	**(234)**	**1.04**	**$44,723**
Electronics and Appliance Stores	385	(234)	1.04	$44,723
Building Material and Garden Equipment and Supplies Dealers	**1,064**	**(179)**	**1.20**	**$35,161**
Building Material and Supplies Dealers	1,005	(170)	1.30	$35,577
Lawn and Garden Equipment and Supplies Stores	59	(8)	0.52	$28,046
Food and Beverage Stores	**2,386**	**363**	**1.07**	**$23,391**
Grocery Stores	2,198	358	1.17	$22,436
Specialty Food Stores	128	(11)	0.57	$34,158
Beer, Wine, and Liquor Stores	60	16	0.49	$35,382

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Health and Personal Care Stores	**969**	**(9)**	**1.17**	**$36,511**
Health and Personal Care Stores	969	(9)	1.17	$36,511
Gasoline Stations	**573**	**(76)**	**0.89**	**$22,174**
Gasoline Stations	573	(76)	0.89	$22,174
Clothing and Clothing Accessories Stores	**2,015**	**74**	**1.75**	**$18,066**
Clothing Stores	1,703	106	1.96	$15,813
Shoe Stores	126	(25)	0.85	$22,695
Jewelry, Luggage, and Leather Goods Stores	186	(7)	1.35	$35,580
Sporting Goods, Hobby, Book, and Music Stores	**745**	**38**	**1.37**	**$20,462**
Sporting Goods, Hobby, and Musical Instrument Stores	598	74	1.38	$21,203
Book, Periodical, and Music Stores	147	(36)	1.32	$17,444
General Merchandise Stores	**2,600**	**(175)**	**1.12**	**$26,777**
Department Stores	1,071	(17)	0.98	$21,855
Other General Merchandise Stores	1,528	(160)	1.26	$30,228
Miscellaneous Store Retailers	**1,167**	**(82)**	**1.01**	**$22,543**
Florists	62	(13)	0.66	$18,641
Office Supplies, Stationery, and Gift Stores	440	(78)	1.34	$18,891
Used Merchandise Stores	221	37	0.97	$19,526
Other Miscellaneous Store Retailers	444	(29)	0.88	$28,198
Nonstore Retailers	**878**	**(41)**	**0.81**	**$18,338**
Electronic Shopping and Mail-Order Houses	299	13	0.96	$28,171
Vending Machine Operators	35	(40)	0.72	$18,662
Direct Selling Establishments	544	(13)	0.76	$12,924
Transportation and Warehousing	**2,782**	**(117)**	**0.66**	**$42,928**
Air Transportation	**57**	**(3)**	**0.17**	**$60,552**
Scheduled Air Transportation	27	(20)	0.09	$48,885
Nonscheduled Air Transportation	30	16	0.74	$70,924
Rail Transportation	**42**	**(13)**	**0.24**	**$90,576**
Rail Transportation	42	(13)	0.24	$90,576
Water Transportation	**23**	**4**	**0.46**	**$97,070**
Inland Water Transportation	14	--	0.72	$77,266
Truck Transportation	**907**	**(54)**	**0.63**	**$47,332**
General Freight Trucking	610	(8)	0.55	$46,823
Specialized Freight Trucking	296	(46)	0.85	$48,379

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Transit and Ground Passenger Transportation	**280**	**142**	**0.56**	**$26,545**
Urban Transit Systems	45	--	1.40	$42,776
Taxi and Limousine Service	120	10	0.60	$22,561
Other Transit and Ground Passenger Transportation	111	91	1.26	$24,904
Scenic and Sightseeing Transportation	**73**	**(5)**	**2.40**	**$16,889**
Scenic and Sightseeing Transportation, Land	51	15	4.47	$17,362
Scenic and Sightseeing Transportation, Water	22	(21)	1.36	$15,769
Support Activities for Transportation	**755**	**(194)**	**1.51**	**$45,825**
Support Activities for Air Transportation	59	(12)	0.47	$34,841
Support Activities for Water Transportation	335	(168)	4.78	$40,169
Support Activities for Road Transportation	52	(16)	0.61	$23,386
Freight Transportation Arrangement	234	(3)	1.36	$55,644
Other Support Activities for Transportation	70	(1)	2.96	$65,686
Couriers and Messengers	**428**	**(79)**	**0.77**	**$40,389**
Couriers and Express Delivery Services	367	(78)	0.82	$43,820
Local Messengers and Local Delivery	61	(2)	0.56	$19,668
Warehousing and Storage	**216**	**86**	**0.38**	**$29,485**
Warehousing and Storage	216	86	0.38	$29,485
Information	**2,963**	**(261)**	**1.26**	**$53,413**
Publishing Industries (except Internet)	**377**	**(117)**	**0.60**	**$46,755**
Newspaper, Periodical, Book, and Directory Publishers	286	(153)	0.73	$35,659
Software Publishers	91	36	0.39	$81,866
Motion Picture and Sound Recording Industries	**280**	**55**	**0.84**	**$31,003**
Motion Picture and Video Industries	259	52	0.86	$31,609
Sound Recording Industries	20	2	0.69	$23,334
Broadcasting (except Internet)	**404**	**(215)**	**1.67**	**$42,027**
Radio and Television Broadcasting	373	25	2.02	$41,233
Cable and Other Subscription Programming	31	(240)	0.55	$51,506
Telecommunications	**1,776**	**10**	**2.45**	**$63,438**
Wired Telecommunications Carriers	400	17	0.80	$65,189
Wireless Telecommunications Carriers (except Satellite)	1,347	22	10.82	$63,262
Other Telecommunications	28	(3)	0.31	$47,972
Data Processing, Hosting and Related Services	**60**	**(14)**	**0.25**	**$19,141**
Data Processing, Hosting, and Related Services	60	(14)	0.25	$19,141

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Other Information Services	**67**	**21**	**0.37**	**$17,767**
Other Information Services	67	21	0.37	$17,767
Finance and Insurance	**5,551**	**562**	**0.78**	**$62,554**
Credit Intermediation and Related Activities	**1,592**	**(581)**	**0.77**	**$74,368**
Depository Credit Intermediation	1,082	(467)	0.85	$77,584
Nondepository Credit Intermediation	345	(86)	0.68	$74,425
Activities Related to Credit Intermediation	165	(28)	0.60	$53,157
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	**2,120**	**813**	**0.84**	**$50,278**
Securities and Commodity Contracts Intermediation and Brokerage	421	111	0.79	$99,461
Other Financial Investment Activities	1,695	705	0.87	$37,902
Insurance Carriers and Related Activities	**1,523**	**248**	**0.71**	**$53,498**
Insurance Carriers	94	(38)	0.10	$63,712
Agencies, Brokerages, and Other Insurance-related Activities	1,429	286	1.14	$52,828
Funds, Trusts, and Other Financial Vehicles	**316**	**82**	**0.77**	**$129,147**
Insurance and Employee Benefit Funds	300	150	1.35	$132,687
Other Investment Pools and Funds	16	(68)	0.08	$60,969
Real Estate and Rental and Leasing	**9,399**	**1,169**	**1.58**	**$24,135**
Real Estate	**8,548**	**1,073**	**1.58**	**$22,762**
Lessors of Real Estate	3,747	1,045	1.54	$29,735
Offices of Real Estate Agents and Brokers	2,108	(316)	1.56	$14,453
Activities Related to Real Estate	2,693	344	1.66	$19,563
Rental and Leasing Services	**840**	**86**	**1.56**	**$37,888**
Automotive Equipment Rental and Leasing	288	(5)	1.74	$36,767
Consumer Goods Rental	239	(5)	1.50	$28,947
General Rental Centers	65	1	1.65	$41,488
Commercial and Industrial Machinery and Equipment Rental and Leasing	248	96	1.42	$46,866
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	**11**	**--**	**0.56**	**$40,831**
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	11	--	0.56	$40,831
Professional, Scientific, and Technical Services	**9,418**	**257**	**1.04**	**$60,975**
Legal Services	993	36	0.92	$59,893
Accounting, Tax Preparation, Bookkeeping, and Payroll Services	911	156	0.88	$36,423
Architectural, Engineering, and Related Services	1,234	(120)	1.03	$65,056
Specialized Design Services	324	21	1.09	$31,200

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Computer Systems Design and Related Services	696	89	0.45	$68,339
Management, Scientific, and Technical Consulting Services	1,266	206	0.82	$55,233
Scientific Research and Development Services	2,098	(468)	4.24	$99,275
Advertising, Public Relations, and Related Services	270	2	0.56	$48,009
Other Professional, Scientific, and Technical Services	1,624	333	1.17	$32,247
Management of Companies and Enterprises	**836**	**311**	**0.52**	**$96,807**
Administrative and Support and Waste Management and Remediation Services	**7,303**	**404**	**0.88**	**$29,594**
Administrative and Support Services	**6,964**	**451**	**0.87**	**$28,731**
Office Administrative Services	757	230	1.36	$38,595
Facilities Support Services	47	14	0.39	$23,432
Employment Services	1,601	(154)	0.66	$32,079
Business Support Services	403	95	0.47	$23,564
Travel Arrangement and Reservation Services	76	2	0.41	$44,434
Investigation and Security Services	664	67	0.92	$36,720
Services to Buildings and Dwellings	2,798	8	0.98	$21,150
Other Support Services	618	189	1.90	$35,566
Waste Management and Remediation Services	**338**	**(49)**	**1.20**	**$47,361**
Waste Collection	228	5	1.98	$45,822
Waste Treatment and Disposal	70	(24)	1.00	$53,572
Remediation and Other Waste Management Services	41	(29)	0.42	$45,270
Educational Services (Private)	**1,914**	**493**	**0.58**	**$21,238**
Educational Services (Private)	**1,914**	**493**	**0.58**	**$21,238**
Elementary and Secondary Schools (Private)	712	207	0.93	$28,144
Colleges, Universities, and Professional Schools (Private)	197	(43)	0.15	$30,912
Business Schools and Computer and Management Training (Private)	177	94	1.30	$22,709
Technical and Trade Schools (Private)	32	(19)	0.21	$20,990
Other Schools and Instruction (Private)	644	190	0.96	$10,223
Educational Support Services (Private)	147	62	0.86	$21,474
Health Care and Social Assistance	**13,188**	**511**	**0.92**	**$49,135**
Ambulatory Health Care Services	**7,976**	**406**	**1.39**	**$63,249**
Offices of Physicians	3,809	379	1.96	$84,205
Offices of Dentists	810	7	1.22	$61,713
Offices of Other Health Practitioners	1,131	162	1.21	$41,385
Outpatient Care Centers	524	202	1.02	$42,263

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Medical and Diagnostic Laboratories	173	(30)	0.90	$68,406
Home Healthcare Services	1,350	(345)	1.09	$31,919
Other Ambulatory Healthcare Services	180	33	0.76	$55,196
Nursing and Residential Care Facilities	**2,869**	**356**	**1.20**	**$28,644**
Nursing Care Facilities	963	(165)	0.80	$33,527
Residential Mental Retardation, Mental Health, and Substance Abuse Facilities	621	131	1.35	$27,367
Community Care Facilities for the Elderly	1,186	472	1.94	$25,115
Other Residential Care Facilities	100	(81)	0.80	$31,405
Social Assistance	**2,335**	**(80)**	**0.83**	**$26,117**
Individual and Family Services	1,130	35	0.96	$30,027
Community Food and Housing and Emergency and Other Relief Services	138	37	1.18	$36,717
Vocational Rehabilitation Services	27	15	0.10	$17,168
Child Day Care Services	1,040	(167)	0.83	$20,696
Arts, Entertainment, and Recreation	**3,683**	**737**	**1.28**	**$18,783**
Performing Arts, Spectator Sports, and Related Industries	**1,329**	**293**	**0.92**	**$15,826**
Performing Arts Companies	166	79	1.07	$19,820
Spectator Sports	169	40	0.61	$11,124
Promoters of Performing Arts, Sports, and Similar Events	87	22	0.68	$25,459
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	52	24	0.93	$26,140
Independent Artists, Writers, and Performers	854	126	1.03	$14,362
Museums, Historical Sites, and Similar Institutions	**77**	**18**	**0.76**	**$26,810**
Museums, Historical Sites, and Similar Institutions	77	18	0.76	$26,810
Amusement, Gambling, and Recreation Industries	**2,277**	**426**	**1.70**	**$20,239**
Amusement Parks and Arcades	127	28	0.91	$15,849
Gambling Industries	29	--	0.25	$29,350
Other Amusement and Recreation Industries	2,121	377	1.96	$20,378
Accommodation and Food Services	**14,587**	**496**	**1.56**	**$17,428**
Accommodation	**2,235**	**466**	**1.56**	**$21,226**
Traveler Accommodation	2,187	463	1.63	$21,296
RV (Recreational Vehicle) Parks and Recreational Camps	24	(1)	0.45	$16,526
Rooming and Boarding Houses	24	5	0.62	$19,639
Food Services and Drinking Places	**12,352**	**29**	**1.56**	**$16,741**
Full-service Restaurants	6,555	(333)	1.83	$17,540
Limited-service Eating Places	4,642	97	1.41	$15,294

Industry	2013 3Q Jobs	5-Year Change	LQ	Avg. Earnings Per Job
Special Food Services	594	61	0.83	$19,706
Drinking Places (Alcoholic Beverages)	561	204	1.78	$16,238
Other Services (except Public Administration)	**7,005**	**352**	**0.88**	**$21,758**
Repair and Maintenance	**1,339**	**(84)**	**0.92**	**$31,213**
Automotive Repair and Maintenance	847	(72)	0.99	$31,861
Electronic and Precision Equipment Repair and Maintenance	61	3	0.55	$22,117
Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	105	(44)	0.58	$35,958
Personal and Household Goods Repair and Maintenance	326	28	1.07	$29,682
Personal and Laundry Services	**2,892**	**514**	**0.98**	**$22,807**
Personal Care Services	1,492	282	1.04	$20,947
Death Care Services	103	(12)	0.95	$41,087
Dry cleaning and Laundry Services	306	(8)	1.27	$28,884
Other Personal Services	992	254	0.86	$21,841
Religious, Grantmaking, Civic, Professional, and Similar Organizations	**1,979**	**(17)**	**0.88**	**$20,021**
Religious Organizations	1,289	94	0.96	$17,655
Grantmaking and Giving Services	41	(13)	0.39	$39,036
Social Advocacy Organizations	17	(14)	0.11	$48,566
Civic and Social Organizations	372	(70)	1.23	$15,793
Business, Professional, Labor, Political, and Similar Organizations	260	(13)	0.74	$32,942
Private Households	**795**	**(61)**	**0.62**	**$6,351**
Private Households	795	(61)	0.62	$6,351
Government	**19,295**	**332**	**1.12**	**$56,087**
Federal Government	**1,695**	**106**	**0.48**	**$74,637**
Federal Government, Civilian	1,023	112	0.50	$101,069
Federal Government, Military	671	(7)	0.45	$34,356
State Government	**5,673**	**399**	**1.54**	**$48,594**
Education and Hospitals (State Government)	4,402	230	2.14	$46,681
State Government, Excluding Education and Hospitals	1,272	170	0.78	$55,216
Local Government	**11,927**	**(174)**	**1.19**	**$57,015**
Education and Hospitals (Local Government)	8,305	352	1.37	$58,010
Local Government, Excluding Education and Hospitals	3,622	(525)	0.92	$54,733
Total	**130,880**	**(732)**		**$42,289**

Source: Economic Modeling Specialist, Garner Economics

II. New Hanover Occupational Details – 2013 2Q

Highly specialized occupations (LQ greater than 1.20) or high relative earnings (above $18.08, the median hourly wage in New Hanover) are highlighted in **green**.

Description	2013 3Q Jobs	5-Year Change	LQ	Median Hourly Earnings
Management	**6,988**	**52**	**0.78**	**$31.63**
Top Executives	1,751	(146)	0.93	$45.66
Advertising, Marketing, Promotions, Public Relations, and Sales Managers	361	6	0.64	$36.03
Operations Specialties Managers	832	12	0.61	$42.90
Other Management	4,044	180	0.78	$22.77
Business and Financial Operations	**6,002**	**557**	**0.8**	**$26.97**
Business Operations Specialists	2,612	36	0.68	$27.63
Financial Specialists	3,390	520	0.91	$26.45
Computer and Mathematical	**1,718**	**20**	**0.56**	**$28.80**
Computer	1,638	23	0.55	$28.74
Mathematical Science	80	(2)	0.84	$30.11
Architecture and Engineering	**1,973**	**(264)**	**1.02**	**$37.52**
Architects, Surveyors, and Cartographers	163	(49)	0.9	$33.95
Engineers	1,363	(116)	1.13	$42.70
Drafters, Engineering Technicians, and Mapping Technicians	446	(100)	0.83	$23.05
Life, Physical, and Social Science	**1,356**	**(44)**	**1.23**	**$25.66**
Life Scientists	280	(14)	1.32	$34.78
Physical Scientists	427	5	1.82	$24.46
Social Scientists and Related Workers	373	(14)	0.95	$26.44
Life, Physical, and Social Science Technicians	276	(21)	1.05	$17.30
Community and Social Service	**1,668**	**70**	**0.94**	**$20.11**
Counselors, Social Workers, and Other Community and Social Service Specialists	1,387	52	0.95	$20.33
Religious Workers	282	19	0.91	$19.01
Legal	**1,066**	**62**	**0.98**	**$28.18**
Lawyers, Judges, and Related Workers	557	30	0.78	$39.09
Legal Support Workers	510	33	1.35	$16.33
Education, Training, and Library	**6,340**	**(525)**	**0.95**	**$18.97**
Post-secondary Teachers	1,417	89	1.37	$31.24
Preschool, Primary, Secondary, and Special Education School Teachers	2,579	(520)	0.87	$17.09
Other Teachers and Instructors	1,132	36	0.83	$13.49

Description	2013 3Q Jobs	5-Year Change	LQ	Median Hourly Earnings
Librarians, Curators, and Archivists	143	(10)	0.68	$21.17
Other Education, Training, and Library	1,070	(119)	0.96	$12.57
Arts, Design, Entertainment, Sports, and Media	**3,741**	**482**	**0.97**	**$15.91**
Art and Design Workers	883	43	0.87	$16.31
Entertainers and Performers, Sports and Related Workers	1,074	204	1.07	$17.56
Media and Communication Workers	965	122	0.9	$17.13
Media and Communication Equipment Workers	818	112	1.07	$12.00
Healthcare Practitioners and Technical	**7,328**	**949**	**1.19**	**$35.67**
Health Diagnosing and Treating Practitioners	4,859	667	1.24	$43.39
Health Technologists and Technicians	2,399	278	1.13	$20.36
Other Healthcare Practitioners and Technical	70	4	0.63	$27.67
Healthcare Support	**4,783**	**473**	**1.42**	**$12.46**
Nursing, Psychiatric, and Home Health Aides	2,658	243	1.31	$10.41
Occupational Therapy and Physical Therapist Assistants and Aides	165	30	1.42	$21.78
Other Healthcare Support	1,959	200	1.6	$14.46
Protective Service	**2,638**	**(7)**	**1.07**	**$16.17**
Supervisors of Protective Service Workers	287	(13)	1.48	$27.35
Firefighting and Prevention Workers	504	(25)	2.23	$14.84
Law Enforcement Workers	930	(33)	1.03	$18.19
Other Protective Service Workers	917	63	0.79	$11.34
Food Preparation and Serving Related	**13,264**	**200**	**1.49**	**$9.65**
Supervisors of Food Preparation and Serving Workers	1,225	32	1.62	$16.52
Cooks and Food Preparation Workers	2,683	44	1.18	$10.14
Food and Beverage Serving Workers	7,774	169	1.58	$8.63
Other Food Preparation and Serving Related Workers	1,583	(44)	1.65	$8.51
Building and Grounds Cleaning and Maintenance	**5,837**	**262**	**1.06**	**$10.39**
Supervisors of Building and Grounds Cleaning and Maintenance Workers	481	(6)	1.27	$15.17
Building Cleaning and Pest Control Workers	4,094	239	1.01	$9.35
Grounds Maintenance Workers	1,262	29	1.17	$11.90
Personal Care and Service	**5,200**	**515**	**0.84**	**$10.68**
Supervisors of Personal Care and Service Workers	325	34	1.16	$15.03
Animal Care and Service Workers	626	126	0.85	$11.05
Entertainment Attendants and Related Workers	570	70	1.31	$9.49
Funeral Service Workers	25	(3)	0.49	$18.99

Description	2013 3Q Jobs	5-Year Change	LQ	Median Hourly Earnings
Personal Appearance Workers	1,130	223	0.99	$10.92
Baggage Porters, Bellhops, and Concierges	20	5	0.4	$8.14
Tour and Travel Guides	73	11	1.3	$12.65
Other Personal Care and Service Workers	2,431	50	0.7	$10.01
Sales and Related	**20,980**	**931**	**1.22**	**$14.49**
Supervisors of Sales Workers	2,577	116	1.19	$17.44
Retail Sales Workers	8,640	(242)	1.3	$9.92
Sales Representatives, Services	2,524	434	0.99	$23.61
Sales Representatives, Wholesale and Manufacturing	1,178	(33)	0.77	$24.44
Other Sales and Related Workers	6,061	656	1.42	$14.09
Office and Administrative Support	**17,100**	**(230)**	**0.97**	**$15.33**
Supervisors of Office and Administrative Support Workers	1,001	(25)	0.94	$23.41
Communications Equipment Operators	140	(9)	1.38	$13.71
Financial Clerks	2,922	(116)	1.04	$16.12
Information and Record Clerks	4,727	208	1.15	$14.08
Material Recording, Scheduling, Dispatching, and Distributing Workers	2,275	(173)	0.76	$14.26
Secretaries and Administrative Assistants	3,373	(52)	1.08	$16.40
Other Office and Administrative Support Workers	2,661	(63)	0.79	$13.28
Farming, Fishing, and Forestry	**231**	**(43)**	**0.26**	**$20.82**
Supervisors of Farming, Fishing, and Forestry Workers	11	(2)	0.28	$34.58
Agricultural Workers	97	1	0.13	$30.19
Fishing and Hunting Workers	105	(33)	1.58	$12.77
Forest, Conservation, and Logging Workers	18	(9)	0.29	$12.65
Construction and Extraction	**5,606**	**(2,762)**	**1**	**$17.65**
Supervisors of Construction and Extraction Workers	681	(235)	1.19	$24.48
Construction Trades Workers	4,182	(2,296)	0.97	$16.82
Helpers, Construction Trades	306	(171)	1.8	$11.43
Other Construction and Related Workers	396	(74)	1.2	$19.69
Extraction Workers	41	14	0.17	$17.56
Installation, Maintenance, and Repair	**4,842**	**(327)**	**1.07**	**$18.55**
Supervisors of Installation, Maintenance, and Repair Workers	383	(31)	1.19	$25.04
Electrical and Electronic Equipment Mechanics, Installers, and Repairers	575	(57)	1.15	$18.36
Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1,319	(135)	0.99	$18.43
Other Installation, Maintenance, and Repair	2,565	(105)	1.07	$17.69

Description	2013 3Q Jobs	5-Year Change	LQ	Median Hourly Earnings
Production	**4,977**	**(756)**	**0.73**	**$20.94**
Supervisors of Production Workers	311	(54)	0.71	$27.74
Assemblers and Fabricators	642	(142)	0.5	$16.13
Food Processing Workers	300	17	0.55	$10.37
Metal Workers and Plastic Workers	1,263	(224)	0.9	$26.50
Printing Workers	90	(58)	0.44	$13.71
Textile, Apparel, and Furnishings Workers	589	(31)	0.94	$12.23
Woodworkers	106	(54)	0.56	$16.00
Plant and System Operators	263	(22)	1.18	$24.70
Other Production	1,412	(188)	0.74	$22.58
Transportation and Material Moving	**6,200**	**(353)**	**0.82**	**$14.47**
Supervisors of Transportation and Material Moving Workers	381	(3)	1.34	$25.81
Air Transportation Workers	54	8	0.31	$57.07
Motor Vehicle Operators	2,764	(81)	0.81	$14.25
Rail Transportation Workers	24	(6)	0.25	$25.04
Water Transportation Workers	157	(38)	2.28	$22.06
Other Transportation Workers	227	(8)	0.92	$10.01
Material Moving Workers	2,593	(224)	0.8	$12.01
Military	**671**	**(7)**	**0.45**	**$17.20**
Military	671	(7)	0.45	$17.20
Unclassified Occupation	**371**	**12**	**0.68**	**$12.43**
Unclassified Occupation	371	12	0.68	$12.43
Total	**130,880**	**(732)**		**$18.08**

Source: Economic Modeling Specialist, Garner Economics