



Economic Development Strategic Plan

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CREATIVE ECONOMIC DEVELOPMENT CONSULTING, LLC

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Executive Summary

Elizabeth City, North Carolina, is a town that has begun to seize its opportunities. Proximate to the fast-growing Hampton Roads region anchored by Virginia Beach and world-class commercial and industrial assets, Elizabeth City and Pasquotank County have the ability to direct and leverage their growth. With a beautiful waterfront, strong and connected ground transportation networks, and appropriate industrial and commercial properties, Elizabeth City has the ingredients to become a thriving center of commerce for northeastern North Carolina.

This economic development strategic planning process was sponsored by ElectriCities of N.C., Inc. as a service to its member communities. ElectriCities knows that companies and people invest in communities that invest in themselves. This strategic plan can guide Elizabeth City and Pasquotank County to make strategic investments in time and resources that will result in a stronger, more sustainable economy.

The strategic planning process included community engagement, SWOT Analysis, target sector analysis, and economic and demographic research. An asset-based approach to strategic planning was used, building goals, strategies, and action steps around the assets and future opportunities of the area. The identified strengths include available industrial and commercial real estate, proximity to the Hampton Roads region, and the waterfront. The city and county are challenged by downward demographic trends and a small pool of existing private sector employers. Opportunities include new Interstate 87, several industrial properties, and increased connectivity with the Hampton Roads area.

The Economic Development Strategic Plan outlines strategies in attracting and growing jobs, communicating the assets and positive messages about Elizabeth City, and assuring the area is “development” ready for the growth. The economic development goals, strategies, and action steps are summarized on the next pages. We encourage a full read of this report to understand the context of the strategic plan.

Elizabeth City and Pasquotank County comprise a small group of citizens and leaders who are passionate about revitalizing the community and have a clear vision for the future. According to Margaret Mead, a small passionate group is all that is needed to change the world.

Economic Development Strategic Plan Summary

Goal: Attract new jobs through positioning, recruitment, and marketing

- **Strategy:** *Targeted Lead Generation*
- **Strategy:** *Develop regional marketing and recruitment program targeting commercial realtors, brokers, and allies*
- **Strategy:** *Develop collateral marketing materials communicating to the priority targets*
- **Strategy:** *Align incentives and public investment policies with recruitment goals*

Goal: Prepare for and catalyze job growth through product development

- **Strategy:** *Promote priority properties to generate job growth*
- **Strategy:** *Evaluate available product against industry targets and economic development goals*

Goal: Support job growth from existing companies and small businesses

- **Strategy:** *Develop a Business Retention and Expansion Program to support job growth and retention*
- **Strategy:** *Develop materials and networks to support and guide entrepreneurs and small businesses*

Goal: Support workforce strategies to ensure the talent pipeline to support existing companies and targeted sectors

- **Strategy:** *Support and facilitate partnerships with colleges and K-12 system and schools*
- **Strategy:** *Advance and develop collaborative/shared vocational training/exposure for K-12*
- **Strategy:** *Advocate for funding, infrastructure, and centers of innovation in key supporting higher education programs*

SWOT Analysis

A SWOT (strengths, weaknesses, opportunities, and threats) Analysis is used as a foundational building block for the strategic plan. The most effective economic development strategies build upon the assets a community has and the assets they can develop. The SWOT Analysis was developed from information gathered during research, interviews, a community input session, and a community survey. It was then vetted with the leadership team. In total, more than 100 people had input into the SWOT Analysis, and the summary reflects their input.

Summary

Strengths

- History
- Waterfront
- Location
- Proximity to Norfolk
- Airport
- Cultural Assets

Weaknesses

- Lack of Direction
- Low Wealth
- Lack of Manufacturing Base
- Poor Secondary Roads
- Low Supply of Skilled Labor
- Lack of Private Sector Jobs

Opportunities

- Connection w/Colleges
- Waterfront Master Plan
- Promote Positive Messages
- Available Land
- Regional Industrial Assets
- Industrial Parks

Threats

- Weather Disasters
- Flat tax revenues
- Young People Leaving
- Negative Outlook
- Need Role Clarity
- Higher Ed Declining Enrollment

STRENGTHS

Strengths are assets that support business development, attract tourists, and provide residents with quality of life. Many assets reported in interviews and the community survey are related to the improved ground transportation and connectivity to the Hampton Roads area. Another theme relies on historic properties, waterfront, and downtown as anchors to the "placemaking" for the area. Additional physical assets such as colleges, rail lines, the airport, and health care facilities offer strengths for existing and new residents. Positioning as the anchor of northeastern North Carolina can connect and leverage all these identified strengths.

- ⊙ Historic Buildings
- ⊙ Historic Residential Communities
- ⊙ Higher Ed is aligned with Economic Development
- ⊙ Low-Cost Housing
- ⊙ Incentives for adaptive reuse
- ⊙ Historic Tax Credits
- ⊙ Moderate Climate
- ⊙ STEM schools
- ⊙ Close to Beach Amenities
- ⊙ Proximity to Hampton Roads Metro
- ⊙ Good Fiber utilities
- ⊙ Diverse Population
- ⊙ Wind Farms
- ⊙ Retail regional hub
- ⊙ Strong leaders
- ⊙ Ground Transportation Improvements
- ⊙ US 17 will be interstate
- ⊙ Hospitals and Healthcare system
- ⊙ Location Assets
- ⊙ Higher ED (3 colleges)
- ⊙ Port of Virginia
- ⊙ Low Cost of doing business
- ⊙ FTZ #20
- ⊙ Opportunity Zones
- ⊙ Tier 1 County
- ⊙ Beautiful rivers
- ⊙ Available workforce
- ⊙ Elected Leaders are Economic Development Advocates
- ⊙ Airport Airpark
- ⊙ Rail assets
- ⊙ Harbor; boat access; beauty
- ⊙ Agricultural base
- ⊙ Transportation and highway assets
- ⊙ Coast Guard station
- ⊙ Hospitals/Access to health care
- ⊙ Excellent health care/nursing training
- ⊙ Waterfront
- ⊙ Airport
- ⊙ Climate
- ⊙ Cultural assets – arts of the Albemarle, museums
- ⊙ Cultural Diversity
- ⊙ Family Oriented
- ⊙ Location/Access
- ⊙ Shopping Centers

WEAKNESSES

Weaknesses are obstacles to growth that deter business expansion and negatively impact quality of life. Elizabeth City focus on strategies which address the source of weaknesses while capitalizing on strengths and opportunities. Many of the weaknesses identified -- lack of private sector jobs, low wages and incomes, and tax revenues not growing, for example -- will be directly impacted by a strong local economic development strategy. As the economic development agencies and its allies work toward strategic job growth goals, this will also influence the civic attitude and vision.

- ⊙ Lack of unified direction
- ⊙ We are a "low wealth" community
- ⊙ K-12 scores are low – we do not compare well
- ⊙ Perceived lack of support from state of NC
- ⊙ Our connectivity with Virginia means we have less support from NC
- ⊙ We are risk averse
- ⊙ Lack of a nonprofit ED agency
- ⊙ Low supply of skilled labor
- ⊙ Problem recruiting executive talent
- ⊙ Lack of private sector jobs/companies
- ⊙ Lack of social and cultural entertainment and amenities
- ⊙ Low public resources – tax revenues not growing
- ⊙ Increasing costs to rehab historic buildings
- ⊙ Lack of broadband
- ⊙ Lack of arts education
- ⊙ Lack of vocational training in public schools
- ⊙ Code enforcement not sufficient, dilapidated structures
- ⊙ Residential blight in Eliz City
- ⊙ Lack of manufacturing base
- ⊙ No convention center
- ⊙ Low performing public schools
- ⊙ Poor secondary roads
- ⊙ Decreasing influence and investment from the 'state' and Raleigh
- ⊙ Lack of elected leadership and vision
- ⊙ No interstate connections
- ⊙ Low wages/incomes

OPPORTUNITIES

Elizabeth City is poised at the edge of several opportunities that merit time and resource investment. Matching the strengths, the opportunities before Elizabeth City and the surrounding community are significant investments in physical assets such as historic and tourism assets including the waterfront and connectivity to the Outer Banks' beaches, connections and leverage of the strong industrial market in the Hampton Roads area, and focus on job-generating assets such as industrial property, infrastructure at the airport, and potential commercial development of historic properties. An engaged community and leadership will agree on the priorities for investment and advancement around strategic goals.

- ⦿ Connect college students with the City and County –retain them, engage them
- ⦿ Leverage aviation strengths for workforce training and for recruiting new employers
- ⦿ Grow the airpark
- ⦿ Captures out-commuters for workforce
- ⦿ Make creative incentive packages
- ⦿ Connect regional industrial assets
- ⦿ Use Higher Ed to partner with K-12 – support teachers
- ⦿ Develop Pasquotank County Industrial Park
- ⦿ Find additional land for industrial development – pursue public-private approach
- ⦿ Increase recreation and amenities of the waterfront
- ⦿ Increase “getaway” tourism.
- ⦿ Leverage tourism visitors for retirement recruitment
- ⦿ Leverage the Hampton Roads region
- ⦿ Leverage available land
- ⦿ Become a tourism hub for northeastern NC
- ⦿ Attract retirees by building appropriate development/s
- ⦿ Upgrade airport
- ⦿ Tourism
- ⦿ Waterfront Master Plan
- ⦿ Alternative energy investments
- ⦿ Increase Manufacturing
- ⦿ Promote positive messages
- ⦿ Increase community engagement
- ⦿ Bring vocational training back to high schools
- ⦿ Have and promote a bigger vision
- ⦿ Leverage Opportunity Zones

THREATS

Threats must be identified and mitigated in an economic development strategy. These are the factors that are at work in the environment, locality, or broader region that can stymie actions or distract resources from the community's shared goals. It is important to name and discuss perceived threats so that people and organizations can also develop shared responses or approaches to these threats. In Elizabeth City, the perceived threats include weather and economic forces as well as some civic and demographic issues. With new leadership in the local economic development organization and a new strategic plan, these threats can be addressed and managed through planning and strategic communications.

- ⊙ Weather Disasters
- ⊙ Federal Government Contracts E.g. Coast Guard Station
- ⊙ Political Changes
- ⊙ Threat of Recession
- ⊙ Declining enrollment in Higher Ed
- ⊙ Other Communities competing for Economic Development (we are losing ground)
- ⊙ Flat tax revenues
- ⊙ Too Many Cooks – need role clarity and strategy
- ⊙ Parochialism
- ⊙ Negative Outlook of natives
- ⊙ Our goals are too low
- ⊙ Challenges of Tier 1 Communities
- ⊙ Competition for NCDOT dollars – new funding model favors congested areas and population impacted – tough to get our projects through
- ⊙ Our young people are leaving

Economic and Demographic Profile

The consulting team analyzed labor, economic, and demographic data to get a snapshot of how Elizabeth City is changing. The full data set can be found in Appendix A. One consistent takeaway is that Elizabeth City is well-positioned to capitalize on a labor shed which extends well beyond the county and is increasingly connected to the larger metropolitan areas of Hampton Roads, Virginia. There are several indicators where Elizabeth City and Pasquotank County lag the larger region, but in most cases, this represents an opportunity to capitalize on trends in the larger area by bringing growth – new residents, new employment, or new sales – to the immediate area.

Summary

- ⦿ The population of Elizabeth City and Pasquotank County have declined since 2010, while the population of the Virginia Beach-Norfolk MSA and the state of North Carolina have increased over that time. This means that Elizabeth City has the opportunity to capitalize on the regional trend of population growth.
- ⦿ In analyzing population by age, Elizabeth City has a higher ratio of teenagers and young adults than the county or Virginia Beach MSA. This can bode well for the future workforce. On the other hand, the ratio of residents in the prime working age population – 35 to 54 - is lower than the county and the region.
- ⦿ In its racial makeup, Elizabeth City is more diverse than North Carolina or the region. The population of White and Black residents is relatively balanced at 43% and 48% respectively.
- ⦿ The educational attainment of Elizabeth City residents compares favorably with the county, region, and state in percentage of high school graduates and higher. The opportunity lies in residents who have some college but no degree, which is more than 25% of the city's population.
- ⦿ For purposes of this analysis, a laborshed for the Elizabeth City area was identified as Pasquotank, Perquimans, Camden, Chowan, Currituck, and Gates Counties, and Chesapeake, Norfolk, Newport News, Virginia Beach and Portsmouth (VA). This region delivers 22,084 degreed graduates each year (2017). These degrees are focused in Nursing, Liberal Arts, and Sciences as well as Medical/Clinical Assistant credentials.
- ⦿ The scores for the SAT in Pasquotank County lag the scores for the region and for the state of North Carolina.
- ⦿ Income levels in Elizabeth City are lower than income levels for Pasquotank County, the region, and the state. This is true of per capita income as well as median household income. Successful economic development strategies should also raise the income levels in the community.
- ⦿ The labor force, or those available and willing to work in Pasquotank County, has declined slightly in the period 2014 – 2018. Employment levels over that same period are up slightly, reflecting a reduction in the unemployment rate over the same time.

- ⦿ Perquimans County has the highest share of inbound commuters into Pasquotank County. Employers can expect to attract employees from more than a dozen counties in the area.
- ⦿ While Pasquotank County is a long county, stretching from the Virginia border to the Albemarle Sound, it has the largest concentration of employees in northeast North Carolina.
- ⦿ The Elizabeth City laborshed has a population of 1,329,498 and a labor force of 640,951.
- ⦿ The unemployment rate is 4.7% (2018). The number of unemployed in the county has fallen to 801.
- ⦿ The larger laborshed shows signs of underemployment, with a larger portion of jobs present that require only a high school diploma, than is the case in the labor force. Conversely, there are far fewer jobs that require some college or an associate's degree than there are people in the labor force. This can signal an opportunity to successfully recruit companies that employ workers in the targeted degree profile.
- ⦿ The industry sectors with the highest employment in Pasquotank County are Health Care and Social Assistance and Public Administration. These sectors are in the mid-range when evaluating the wages earned by industry sector in the county. Information and Finance and Insurance are among the highest wage sectors in the county.
- ⦿ Comparing the employment by industry to national averages, Government is the largest sector with more than 25%, while nationally the figure is 22%. Retail Trade is also more concentrated than nationally, with more than 20% of jobs in the laborshed compared with 15% in the national economy. Opportunities to increase the proportion locally are visible in Manufacturing, Finance and Insurance, and Health Care and Social Assistance.
- ⦿ Health Care and Social Assistance has added the most jobs of all employment sectors in the laborshed followed by Accommodation and Food Services and Administrative.
- ⦿ Looking at occupational growth, Food Preparation and Serving occupations added the most jobs since 2013. Personal Care and Service and Business and Financial Operations were the next largest contributors to new employment.
- ⦿ Sales subject to retail taxes have increased in Pasquotank County since 2014. Gross collections of retail sales taxes are up nearly \$2 million during that time.
- ⦿ Relative to other jurisdictions, workers who live in Elizabeth City have shorter commutes, with almost one-quarter of employed residents citing a commute of less than ten minutes.
- ⦿ Crime rates for Pasquotank County as a whole are steady to rising.
- ⦿ Travel and tourism employment is up nearly 9% in the County, but total payroll is up more than 26%, meaning that this sector is contributing more than its proportionate share of income to the local economy.

For the full labor and economic analysis, see Appendix A.

Target Industry Analysis Summary

The purpose of this Target Industry Analysis is to identify potential industry sectors for Elizabeth City, North Carolina. Before undertaking target marketing activities, business development programs, or entrepreneurial development programs, it is critically important proper analysis and research be done to maximize efforts on industries with the highest possibilities of expansion and growth within Elizabeth City. Matching the strengths and assets of Elizabeth City with the needs of growing and expanding companies is vital to successful targeting. For this study, Elizabeth City area advantages have been evaluated. These advantages can be built upon to expand the economic base, create jobs, encourage entrepreneurship, and generate new investment.

Economic and demographic trends, national and local industry growth, location quotients, and current industry assets will be factored into the analysis. Pasquotank County, Elizabeth City Micropolitan area, Northeast North Carolina, as well as the Hampton Roads area, was studied to understand and compare the industries in the region. Though the region will be evaluated, target industries were chosen specific to Elizabeth City and the unique opportunities for the city.

Throughout the analysis process, the influence of the military was apparent in the industry base, in the workforce, and in the fabric of the area. The Coast Guard base is one of the largest and most active bases in the United States. In fact, Elizabeth City is known as a "Coast Guard City." Additionally, the whole Hampton Roads, Virginia area and northeast North Carolina region is rich in military assets and influence.

Based on research and analysis, the following target industries are recommended for Elizabeth City:

- ⦿ Aviation, Aerospace, and Defense
- ⦿ Warehousing and Distribution
- ⦿ Green Energy
- ⦿ Precision Manufacturing
- ⦿ Food and Beverage Manufacturing

Overall, the objective is not only to find the most feasible industries, but also the most desirable to recommend for Elizabeth City. Aviation, Aerospace, and Defense industries present the opportunity to guide the growth of an already strong base within Elizabeth City and the surrounding area. Warehousing and Distribution is well supported by area assets, as evident in recent investment and job announcements. Green Energy builds on a regional mindset and a developing industry that presents some unique opportunities. Precision Manufacturing, which includes electronics, industry instrumentation and communications equipment, and other manufacturing, takes advantage of the trained workforce and the exiting military. And finally, Food and Beverage Manufacturing draws upon the agricultural assets of the region, where Elizabeth City can take advantage of regional

opportunities in a very stable industry. There is ample opportunity to increase these industries with focused efforts. Target industry definitions and rationale follow for each target sector.

Aerospace, Aviation, and Defense

Target Definition

Code	Description
33641	Aerospace Product and Parts Manufacturing
33661	Ship and Boat Building
48819	Support Activities for Air Transportation
48839	Support Activities for Water Transportation
54133	Engineering Services
81131	Commercial and Industrial Machinery and Equipment Repair and Maintenance

Business Case

Elizabeth City and the whole region surrounding the area, including the Virginia Beach-Norfolk metropolitan area, has a large military presence. The aerospace, aviation, and defense industries are well established in the city, county, and region. The workforce, including exiting military, are well suited for these industries. Also, area colleges and universities support the industry with curriculum and education resources.

The manufacturing areas of aerospace, aviation, and defense, while slowly losing employment in the region, are still major employers and economic drivers. Engineering services has posted recent growth and is forecast to continue in the coming years. The Aviation Research and Development Commerce Park will be a great asset for attracting these industries.

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average	2018 Annual	2018 Annual	2014 Annual	2014 Annual	Five year	Five year
		Employment						
		Quotient	Establishments	Employment	Establishments	Employment	Establishments	Employment
33641	Aerospace Product and Parts Manufacturing	0.07	8	179	9	187	(1)	(8)
33661	Ship and Boat Building	38.27	50	27,241	45	27,732	5	(491)
48819	Support Activities for Air Transportation	1.53	26	918	25	1,060	1	(142)
48839	Support Activities for Water Transportation	20.66	21	825	27	887	(6)	(62)
54133	Engineering Services	1.93	440	9,712	436	8,918	4	794
81131	Industrial Machinery Repair and Maintenance	0.85	126	911	141	1,266	(15)	(355)

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Warehouse and Distribution

Target Definition

Code	Description
48851	Freight Transportation Arrangement
48899	Other Support Activities for Transportation
49311	General Warehousing and Storage
49312	Refrigerated Warehousing and Storage
45411	Electronic Shopping and Mail-Order Houses

Business Case

Elizabeth City's transportation assets will attract warehouse and distribution industries. There is a great network of roads with four-lane access to three interstate highways. The nearby Port of Virginia is one of the deepest shipping channels on the East Coast of the United States. Elizabeth City also has a deepwater barge site with direct access to the Intracoastal Waterway and the Atlantic Ocean.

Warehouse and Distribution is growing in the area, with increases in employment over the last five years. There have been a good number of announced warehouse and distribution investments in recent years. Additionally, the megasite in Elizabeth City could be promoted as a distribution park with rail and interstate service planned.

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average		2018 Annual		2014 Annual		Five year change in Establishments	Five year change in Employment
		Location Quotient	Establishments	Average Employment	Establishments	Average Employment	Establishments		
48851	Freight Transportation Arrangement	1.92	83	2,235	83	1,597	-	638	
48899	Other Support Activities for Transportation	0.55	12	95	NA	NA	NA	NA	
49311	General Warehousing and Storage	0.88	62	4,626	66	2,889	(4)	1,737	
49312	Refrigerated Warehousing and Storage	0.91	14	299	15	257	(1)	42	
45411	Electronic Shopping and Mail-Order Houses	0.76	82	1,562	68	1,093	14	469	

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Green Energy

Target Definition

Code	Description
333611	Turbine and Turbine Generator Set Units Manufacturing
333414	Heating Equipment Manufacturing (including solar heating systems)
334413	Semiconductor and Related Device Manufacturing (including solar cells)
33591	Battery Manufacturing
335991	Carbon and Graphite Product Manufacturing

Green Energy is not easily defined by industry codes, as with other target industries. Key word searches, in addition to the industry codes above, may be needed to identify targets in this sector. Green Energy comes from natural, renewable sources such as sunlight, wind, rain, tides, plants, algae, and geothermal heat. For Elizabeth City, the focus should be on machinery and equipment serving green energy, such as photovoltaic cells, wind blades, wind turbines, and other items as well as the logistics and distribution opportunities for the supply chain. Some of the equipment and machinery supporting this industry may also show up under the Precision Manufacturing industry codes.

Business Case

Elizabeth City has a passion for the environment, evident within the twelve acres of waterfront parks. Additionally, the Amazon Wind Farm is the first utility-scale wind farm in the Southeast, as well as the largest green energy project in North Carolina. Elizabeth City is well positioned to be home to equipment and machinery suppliers to this wind farm. This target allows Elizabeth City the opportunity to be part of a global solution around establishing renewable energy sources and helping these technologies grow. Green industry will continue to grow throughout the world in the coming years, resulting in demand for more technology, equipment, and machinery to support this important industry.

The U.S. Energy Information Administration (EIA) expects non-hydroelectric renewable energy resources such as solar and wind will be the fastest growing source of U.S. electricity generation for at least the next two years. EIA projects that the share of total U.S. electricity generation produced by all renewables other than hydropower will increase by three percentage points during the next two years, from 10% of total generation in 2018 to 13% in 2020. Both wind and solar will increase their capacity in 2019 and 2020. This growth will create more demand for equipment and machinery to support these installations. Elizabeth City can take advantage of these needs in the industry.

Precision Manufacturing

Target Definition

Code	Description
33231	Plate Work and Fabricated Structural Products
33232	Ornamental and Architectural Metal Products
33281	Coating, Engraving, and Heat Treating Metals
33324	Industrial Machinery Manufacturing
33391	Pump and Compressor Manufacturing
3342	Communications Equipment Manufacturing
33451	Measuring and Controlling Instruments Manufacturing
33531	Electrical Equipment Manufacturing
33593	Wiring Device Manufacturing

Code	Description
81121	Electronic Equipment Repair and Maintenance

Business Case

Precision manufacturing is present in the region and in Elizabeth City. In most of the defined precision manufacturing subsectors, there is room to grow when considering location quotients. As with the defense industry, the workforce, including exiting military, are well suited for these industries. Also, many of the subsectors have shown growth in the region over the past five years and are predicted for future growth.

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five year change in Establishments	Five year change in Employment
33231	Plate Work and Fabricated Structural Products	0.46	18	402	16	252	2	150
33232	Ornamental and Architectural Metal Products	0.48	30	546	30	525	-	21
33281	Coating, Engraving, and Heat Treating Metals	0.63	16	454	13	344	3	110
33324	Industrial Machinery Manufacturing	0.54	11	333	11	387	-	(54)
33391	Pump and Compressor Manufacturing	3.51	7	887	6	882	1	5
33422	Broadcast and Wireless Equipment Manufacturing	0.06	3	14	3	21	-	(7)
33451	Measuring and Controlling Instruments Manufacturing	0.25	33	525	28	540	5	(15)
33531	Electrical Equipment Manufacturing	0.53	11	381	11	111	-	270
33593	Wiring Device Manufacturing	1.05	5	239	5	228	-	11
81121	Electronic Equipment Repair and Maintenance	1.38	86	730	80	671	6	59

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Food and Beverage Manufacturing

Target Definition

Code	Description
31171	Seafood Product Preparation and Packaging
31191	Snack Food Manufacturing
31192	Coffee and Tea Manufacturing
31199	All Other Food Manufacturing

Business Case

The Food and Beverage Manufacturing industry represents the natural resources of the Elizabeth City and Pasquotank County, along with the region. Pasquotank County is a leading state producer of potatoes, sorghum, soybeans, wheat, and corn. Agribusiness can include industries beyond farms and food, as we typically think of it. Food and Beverage industries continue to push toward healthy and organic choices for consumers. Food and Beverage industries tend to recognize slow growth and are typically stable when compared to other industries.

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location Quotient	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five year change in Establishments	Five year change in Employment
31171	Seafood Product Preparation and Packaging	3.83	9	681	11	725	(2)	(44)
31191	Snack Food Manufacturing	1.39	7	461	8	453	(1)	8
31192	Coffee and Tea Manufacturing	8.68	7	1,087	NA	NA	NA	NA
31199	All Other Food Manufacturing	NA	NA	NA	NA	NA	NA	NA

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Economic Development Strategic Plan Elizabeth City

Input from the Steering Committee, interviews, the community survey, and public sessions confirmed that the priority goal for Elizabeth City is more jobs available for residents. With existing assets in industrial land and infrastructure and statewide and regional strategies for attracting manufacturing and logistics employers, Elizabeth City is well positioned to benefit from renewed and aggressive action. Layering on top of job-generating strategies is the positioning of Elizabeth City as a strong location for new and expanding image as a center for arts, food, cool developments, and walkable areas. Amplifying and connecting these new messages will continue to impact Elizabeth City's image and positively impact in-migration and visitors to Elizabeth City. Additional attention to existing visitors and increased efforts in marketing and visitor support will extend the time and resources people spend while in Elizabeth City. These goals and their strategies will work to advance and connect these priorities for the improvement of Elizabeth City and its economy.

These goals and public investments informed the development of the strategic plan. They translate to a stronger downtown development program, city investment in public amenities, and enhanced business recruitment and development. The strategic plan includes four broad goals for Elizabeth City's economic development efforts:

-  **Attract New Jobs through positioning, recruitment, and marketing**
-  **Prepare for and catalyze job growth through product development**
-  **Support job growth from existing companies and small businesses**
-  **Support workforce strategies to ensure the talent pipeline to support existing companies and targeted sectors**

Goal: Attract new jobs through positioning, recruitment, and marketing

Strategy: Targeted Lead Generation

Lead generation takes a *dedicated* effort. It is not a one-time activity, nor is it without cost. It can take significant resources to start and maintain over time. This type of program takes consistent prospecting activity, good lead tracking, consistent reporting, and patience. The leads can take time, sometimes years, to develop into opportunities and projects.

Action Steps: Lead Generation/Business Attraction Programs

- ⊙ Recommend a target marketing approach focusing on small and medium-sized regional, national and global companies for direct outreach and lead generation activities.
 - *Company Size:* Small and Mid-Sized (25 to 1,000 employees)

Use research to factor in the corporate footprint, growth, company events (such as mergers/acquisitions, product development, executive changes, capital outlay plans, and other predictive factors) to narrow the leads further for direct outreach and lead generation activities.

- ⊙ Commit to contacting a certain number of companies every month, to keeping good notes in a database, and following up as necessary to nurture leads.
- ⊙ Lead generation and business attraction efforts can be outsourced to a lead generation firm to increase and maintain efforts.
- ⊙ Focus on companies and site selectors.
 - Start marketing in Hampton Roads/Southeast Virginia, and then expand the regions to capture more leads. This program would include outreach through Linked-In, email, or telephone to develop leads and connect with company owners and executives. Each target industry should be part of an active lead generation program, as resources allow.
- ⊙ Set metrics and annual goals after the initial six- to nine-month program is completed and results can be measured.

Action Steps: Trade Shows

Trade shows can be a cost-effective way to meet with a number of companies at one time. On the other hand, often the attendees are business development contacts and not the appropriate contacts for making location decisions. Trade shows can be a great first step in the lead generation process but be prepared for the follow-up and nurturing after the show. Visiting the trade show is step one in the process.

- ⊙ Consider participating in trade shows within its target industries. Share marketing efforts and costs with neighboring counties in your region or state, if objectives are aligned.
- ⊙ Example shows:
 - **AUVSI Xponential** - www.xponential.org, Next Show: May 4-7, 2020 - Boston, MA

- **SPIE Defense and Commercial Sensing** - <https://spie.org/conferences-and-exhibitions/defense--commercial-sensing>, Next Show: April 26-30, 2020 - Anaheim, CA
- **National Business Aviation Association Convention & Exhibition** - <https://nbaa.org/events/2019-business-aviation-convention-exhibition/>, Next Show: Oct 22-24, 2019 - Las Vegas, NV
- **IBEX International Boatbuilders Exhibition and Conference** - <https://www.ibexshow.com>, Next Show: Oct 103, 2019 - Tampa, FL
- **International Manufacturing Technology Show** - <https://www.imts.com/>, Next Show: Sept 14-19, 2020 - Chicago, IL
- **Fabtech** - <https://www.fabtechexpo.com/>, Next Show: November 11-14, 2019 - Chicago, IL
- **Precision Machinery Products Association** - <https://www.pmts.com/>, Next Show: April 13-15, 2021 - Cleveland, OH
- **MODEX** - <https://www.modexshow.com/> Next Show: March 9-12, 2020 - Atlanta, GA
- **Council of Supply Chain Management Professionals (CSCMP) Edge Conference** - <https://cscmpedge.org/ehome/index.php?eventid=344812&> Next Show: Sept 15-18 - Anaheim, CA
- **Cold Chain Global Forum** - <https://www.pharmalogisticsiq.com/events-coldchainglobalforum> Next Show: Oct 15-18, Boston, MA
- **North America Smart Energy Week** - <https://www.solarpowerinternational.com/> Next Show - Sept 23-26 - Salt Lake City, UT

Action Steps: Marketing Trips with Partner Agencies (Meeting Face-to-Face with Companies and Site Selectors)

Marketing trips are another lead generation technique. Meeting face-to-face with prospective companies is a great way to establish a relationship. However, setting a specific number of appointments with qualified leads willing to meet on a specific date, in a specific city, can be an unrealistic goal.

- ⦿ Mitigate costs of the marketing trips by participating with neighboring counties, the region, or a state organization, if the opportunity arises. We do not recommend this approach for Elizabeth City alone, given the time and money it takes to execute a marketing trip and the unlikely immediate return.

Strategy: Develop regional marketing and recruitment program targeting commercial realtors, brokers, and allies

While marketing is traditionally externally-focused, since Elizabeth City is beginning a new marketing effort with new targets and messages, it makes sense to spend some time educating regional allies about the goals, assets, and strategies of Elizabeth City and Pasquotank County. Over time, real estate and economic development partners will begin to extend the efforts of the Elizabeth City/Pasquotank County economic development program when they tell the story of the region.

Action Steps:

- ⦿ Host Familiarization Event for brokers in the Hampton Roads area
- ⦿ Leverage State and Regional economic development partners and their marketing programs

Strategy: Develop collateral marketing materials communicating to the priority targets

With specific marketing targets, a set of key messages should be developed addressing the potential for new and expanding companies to grow in Elizabeth City/Pasquotank County. Messaging should cover the workforce, supply chain connectivity, other industry employers, and real estate available matching that sector. In addition to recruitment messaging, leveraging visitors and business travelers to the area can extend the reach to potential employers.

Action Steps:

- ⦿ Develop and share key messages for each target sector
- ⦿ Provide collaterals as web pages, printed sheets, and downloads from the web.
- ⦿ Connect messaging with tourism and visitor messaging to assure alignment and leverage visitor experience

Strategy: Align incentive and public investment policies with recruitment goals

As part of a holistic evaluation of industry sector targets and the real estate available or ready for development, the public sector should carefully consider its potential investment in future economic development projects. These investments could include public incentives which may be pegged to capital investment and job creation and wage rates. There could be specific public investments needed for specific properties including utility expansions, transportation improvements, etc. It is important to explore these funding needs and to be clear about potential costs associated with occupancy. Companies are often looking to reduce their risk with a new investment and the more detail the local economic development agency can provide, the better the community can compete. Once local agencies have considered their potential investment, it may be possible to attract additional investment from regional, state or federal allies.

Action Steps:

- ⦿ Review current policies against experience and future targets

- ⦿ Advocate for investments in programs or infrastructure to support target sector industries, e.g. workforce programs, funding for airport infrastructure, ground transportation projects, etc.

Goal: Prepare for and catalyze job growth through product development

Perhaps the most important ingredient in the future success for economic development efforts in Elizabeth City/Pasquotank County is the availability of shovel-ready industrial product matching the industry targets that are adopted. The pace and speed of current business decisions means that companies will respond well to sites and properties that are ready to go or that have specific costs and timelines to make them “ready to go.”

Strategy: Promote Priority Properties to generate job growth

With specific priorities identified, the EDC should be in a position to promote specific, catalytic properties strategically. This will require collecting comprehensive information on the properties, understanding any gaps to development such as utility or transportation improvements, and communicating the information widely and through multiple channels.

Action Steps:

- ⦿ Inventory priority properties (buildings and sites) and publicize them on the EDC website and partner websites, including Economic Development Partnership of North Carolina. It is important to feature properties that align with economic development goals and portray the transformational opportunities in the city and county.
- ⦿ Develop marketing sheets for priority industrial properties.
- ⦿ Inventory priority properties for redevelopment and share with interested developers or inquirers.

Strategy: Evaluate available product against industry targets and economic development goals

Once industry targets are identified, the industrial and commercial product should be evaluated against the particular needs and characteristics of these industries. For example, Food and Beverage Processing are water-intensive industries. Industrial availability should be considered three to seven years into the future so that the first “win” for the community does not severely deplete the available product for the next prospect

Action Steps:

- ⦿ Identify priority properties by industry type
- ⦿ Consider a Smart Site certification, through partnership with ElectriCities or other certification program, to pre-qualify prime industrial sites for job growth
- ⦿ Explore the potential for a shell building program; identify potential development partners, prioritize potential sites for development, including due diligence and preliminary drawings for future development.

- ⦿ Develop marketing plans and collaterals specifically for the Airport Airpark and Pasquotank Commerce Park
- ⦿ Advance the assembly and marketing of the Tanglewood megasite
- ⦿ Consider or support plans for waterfront redevelopment to enhance this competitive asset

Goal: Support job growth from existing companies and small businesses

The great majority of new job growth in the county will come from existing businesses, and it is much easier to grow and retain an employer than it is to recruit a new one. These reasons demand that a strong economic development program includes strategic focus on existing and growing businesses. As the program is established, focus should be on larger, strategic employers that could be in a position to expand.

Strategy: Develop a Business Retention and Expansion Program to support job growth and retention

Business retention programs include one-on-one calls to key management of major employers and growing companies. In order to extend the reach and reduce the time required, some meetings could be held in groups, and additional allies such as city and county managers could be included.

Action Steps:

- ⦿ Identify and connect with key local and regional employers, focusing on target sectors
- ⦿ Document feedback from companies to support intervention or referral to government partners
- ⦿ Leverage other agencies' business call programs (e.g. EDPNC, ElectriCities) to extend the reach of a local one

Strategy: Develop materials and networks to support and guide entrepreneurs and small businesses

These activities will feed into tourism-related retail and services and contribute to the vibrancy of the community. These companies may also contribute to the redevelopment of historic and walkable properties, which are key to quality of life issues, retaining college students, and attracting residents and tourists. Additional recommendations for small business programming for partner agencies is provided at the close of these recommendations.

Action Steps:

- ⦿ Create a brochure that describes small business resources with explanations and contact information for each organization. This can serve as a directory for interested businesses and be distributed in hard copy or electronically by the EDC, the city and county and by the small business support community.
- ⦿ Add a page to the website to direct small businesses to resources

Goal: Support workforce strategies to ensure the talent pipeline to support existing companies and targeted sectors

While having the appropriate real estate product “ready to go” is the primary driver for economic development marketing, the workforce is also critically important in winning new employers and expansions. Talent wars are the latest news in competing for companies’ investments and hiring announcements. With a variety of industry targets, there should be opportunities for a range of skill levels in the workforce as well. Strong communities will make sure that their educational systems are aligned with the target sectors of their economic development efforts.

Strategy: Support and facilitate business partnerships with colleges and K-12 system and schools

Elizabeth City is fortunate to have several institutions of higher education with which to partner in its economic development efforts. Representatives of these programs will be important allies in recruiting new businesses and also in communicating to the current residents the in-demand occupations and training and education pathways available to reach them. As a small community in eastern North Carolina, the relatively deep access to higher education is a real differentiator for Elizabeth City and Pasquotank County.

Action Steps:

- ① Use Business Retention and Expansion programs to further business and education matching and collaboration. Explore potential for partners (e.g. local associations, schools or school system) to promote business and education partnerships as well.
- ① Advocate for youth programs, inside K-12 and in other formats, to connect and expose youth to careers

Strategy: Advance and develop collaborative/shared vocational training/exposure for K-12

As a center for commerce and education in northeastern North Carolina, Elizabeth City should establish and grow a separate training center which will connect K-12 students and resources with one or more higher education institutions in the area. The program could include current co-op and work-study programs and could grow into industry-led apprenticeship programs to grow the pipeline of manufacturing and skilled workers in the county.

Action Steps:

- ⦿ Use local economic development partners and programs to expand connections between existing companies and industry-aligned training programs in secondary schools.
- ⦿ Work with public schools CTE specialists to evaluate and locate space for training supporting industry targets and major existing employers.

Strategy: Advocate for funding, infrastructure, and centers of innovation in key supporting higher education programs

With a variety of higher education programs available in the community, it is important to understand and communicate how these programs support and align with current employment profiles and recruiting industry targets. Identifying them throughout the area colleges and universities illuminate gaps that may exist for current employers or for targets. Strong programs will be able to plan for changes or additions to local programs in order to address these gaps. Publicizing existing strong programs through the local K-12 system will also influence students to select these programs, especially if there are connections with local and regional employers.

Action Steps:

- ⦿ Catalog supporting programs in local and regional higher education
- ⦿ Advocate for investments in programs or infrastructure to support target sector industries, e.g. workforce
- ⦿ Review existing programs and strategic plans for growth or program expansion at colleges and universities. Incorporate learnings from target sectors and major existing industries to match needs

Goals for Implementation by Partner Agencies

Goal: Support job growth from small businesses and start-ups

As the economic development program matures over time, an additional focus could be added to reach entrepreneurs and start-up companies. In the short-term, we recommend partner agencies take on this role.

Strategy: Develop networks to support and guide entrepreneurs and small businesses

The EDC may initially take the lead in convening the various advocates for small business and may help to identify and connect other agencies in advancing this strategy, but the EDC will not take on the execution of small business and entrepreneurship-development tactics or action steps.

Action Steps:

- ⊙ Identify, publicize, and convene small business advocates and programs in the region to facilitate referral and to leverage networks
- ⊙ Develop “start a business” kits for general purpose or specific activities (e.g. restaurant)
- ⊙ Explore entrepreneurship interest and potential of exiting military and military spouses and target resources and communications and support there

Implementation Guide

This strategic plan is meant to be implemented over a three- to five-year period. We recommend the EDC integrate action steps into the work plan annually, over time accomplishing goals.

1

- Establish a K-12 and higher education collaborative with key industries
- Identify and promote priority sites and properties
- Develop marketing collaterals for Airport Airpark & Pasquotank Commerce Park
- Pursue Smart Site Certification
- Begin existing industry calls or meetings
- Develop industry-specific marketing messages
- Control Tanglewood Megasite
- Create webpage consolidating small biz resources on new EDC website

2-3

- Review incentive and public investment policies
- Pursue targeted lead generation
- Host a familiarization event for Virginia allies
- Advocate for needed investments in priority sites and properties
- Publish brochure of small business resources

4-5

- Expand industry partnerships with K-12 and higher education partners
- Identify trade shows and prospect meeting opportunities
- Evaluate potential for shell building program

Metrics

The Elizabeth City Pasquotank County EDC should measure its activities to report to investors and stakeholders as well as to assist with internal decision-making regarding allocation of resources. We recommend the following data be tracked annually:

- ⊙ Progress on strategic plan action steps
- ⊙ “Touches” – business contacts, inquiries, visits, etc.
- ⊙ Business Retention and Expansion visits
- ⊙ Opens and clicks on e-communications
- ⊙ Job creation
- ⊙ New capital investment
- ⊙ Available buildings
- ⊙ Available sites
- ⊙ New industrial product brought online
- ⊙ Local government capital improvement projects that impact economic development

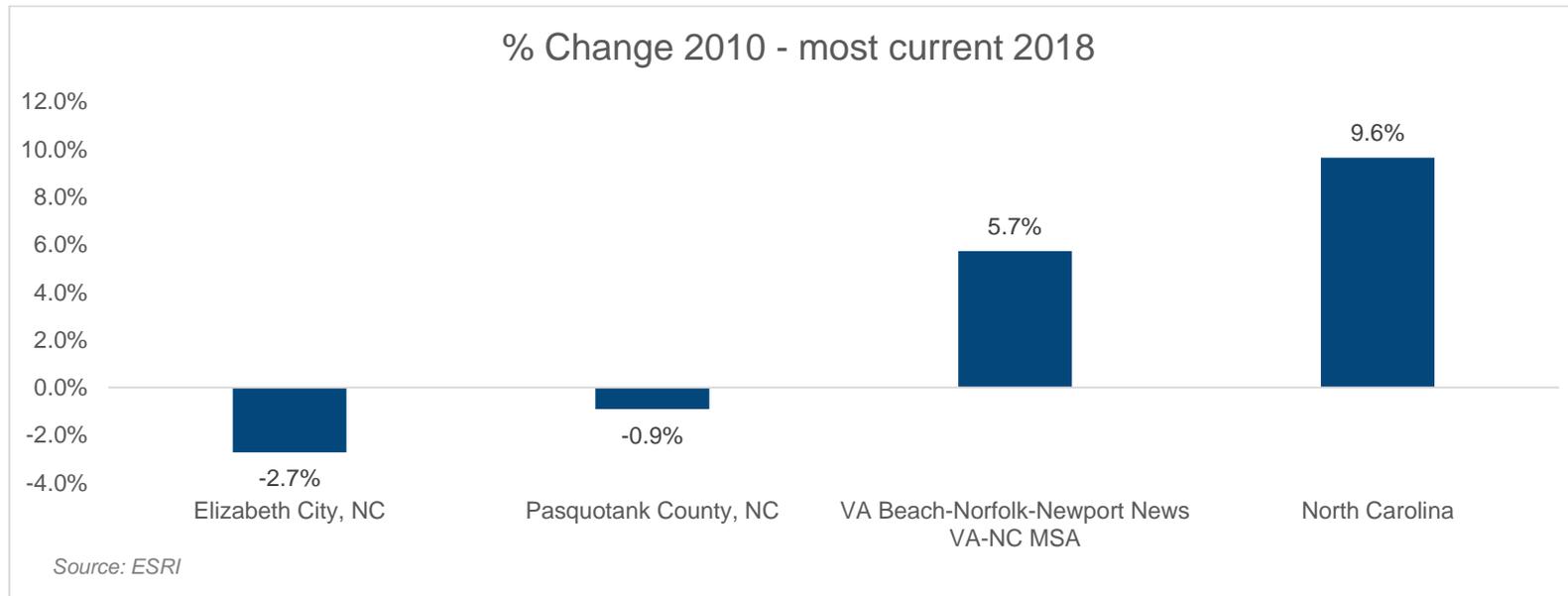
Beyond tracking progress of the organization, we recommend the tracking the overall economic health of the economy (example data points below). The trends will show if the area is headed in the right direction.

- ⊙ Unemployment rate, labor force, and employment by industry
- ⊙ Income and wages
- ⊙ Retail sales
- ⊙ Building permits, commercial and residential
- ⊙ Education statistics on graduation rates, degrees conferred, educational attainment, post-graduation plans
- ⊙ Visitor statistics

If the economic development program is successful over time, the economic indicators listed above will start to move in a positive direction. In the first few years of operations, we recommend measuring the organization by progress on its strategic plan. It will take a few years to move the needles on income, new business starts, and other indicators. However, in the first year, the EDC can make progress on action steps that will lead to positive economic return.

Appendix A: Economic and Demographic Profile

The economic and demographic profile paints a quantitative picture of how Elizabeth City is growing and changing. We researched City of Elizabeth City data, where available, and county data.



Population	2010	2018	% Change 2010 - most current 2018
Elizabeth City, NC	18,318	17,819	-2.7%
Pasquotank County, NC	40,661	40,294	-0.9%
Elizabeth City Laborshed		1,329,498	1.1% (2013-18)
VA Beach-Norfolk-Newport News VA-NC MSA	1,676,822	1,772,840	5.7%
North Carolina	9,535,483	10,455,604	9.6%

Source: ESRI and EMSI

Age	Elizabeth City, NC	Pasquotank County, NC	VA Beach-Norfolk-Newport News VA-NC	North Carolina	Elizabeth City, NC	Pasquotank County, NC
Total population	17,820	40,294	1,772,840	10,455,604	17,925	40,938
Under 5 years	6.7%	6.1%	5.9%	6.0%	6.8%	6.1%
5 to 9 years	6.2%	6.2%	6.1%	6.2%	6.1%	6.0%
10 to 14 years	5.9%	6.2%	6.1%	6.3%	5.9%	6.3%
15 to 24 years	18.2%	14.0%	14.6%	13.1%	17.9%	13.7%
25 to 34 years	13.7%	13.6%	14.9%	13.4%	13.1%	12.7%
35 to 44 years	10.5%	11.9%	12.3%	12.8%	11.4%	12.8%
45 to 54 years	11.1%	12.3%	12.6%	13.1%	10.1%	11.4%
55 to 64 years	11.9%	13.3%	12.8%	13.0%	11.2%	12.5%
65 to 74 years	8.9%	9.8%	8.7%	9.7%	10.1%	10.9%
75 to 84 years	4.7%	4.7%	4.2%	4.5%	5.5%	5.7%
85 years and over	2.2%	1.9%	1.8%	1.8%	2.0%	1.9%
Median Age	34.4	38.2	36.8	38.7	35.2	38.9

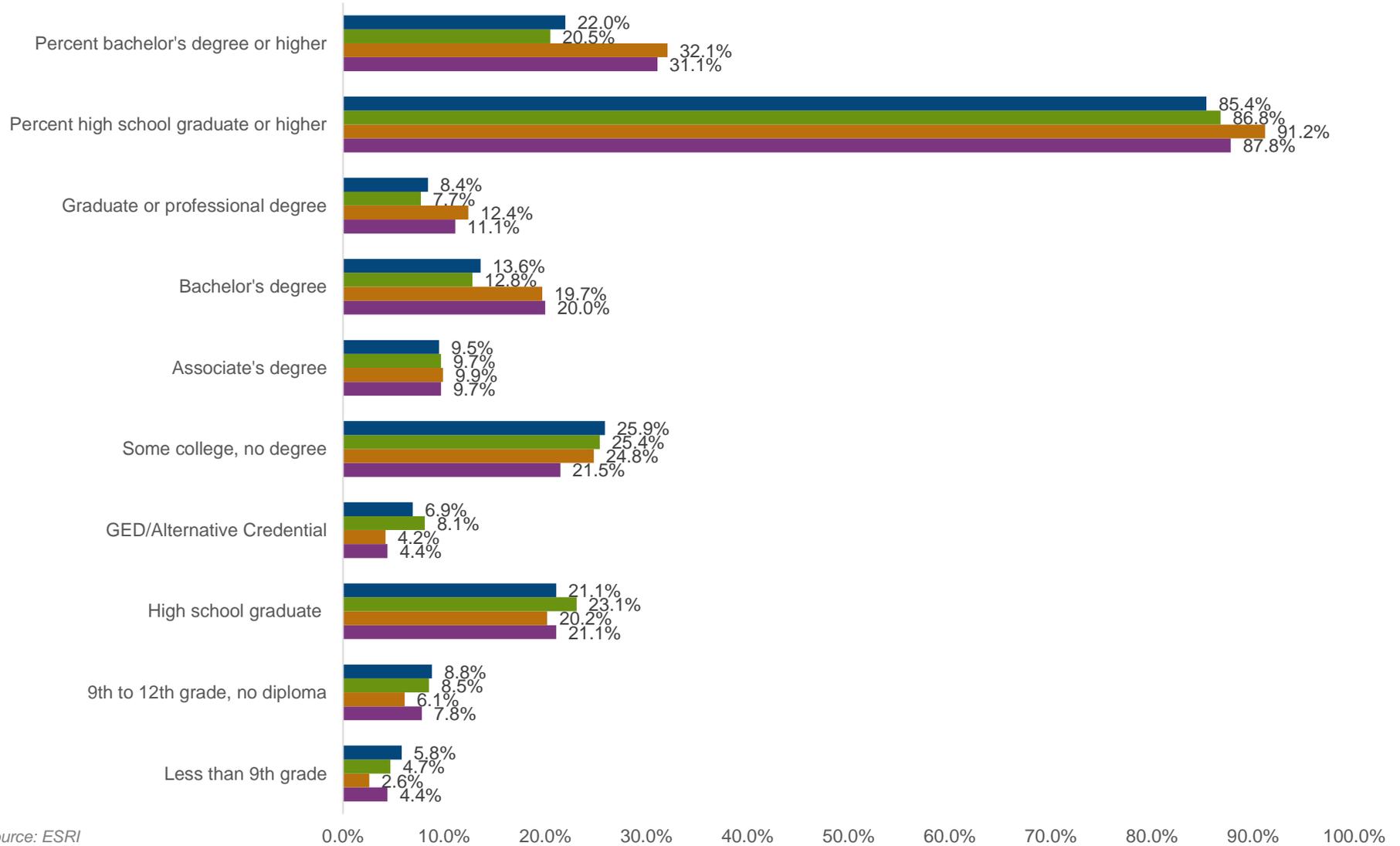
Source: ESRI

2018- Race				
	Elizabeth City, NC	Pasquotank County, NC	VA Beach-Norfolk-Newport News VA-NC	North Carolina
White Alone	43.1%	56.8%	58.2%	66.4%
Black Alone	48.5%	35.7%	30.9%	21.7%
American Indian Alone	0%	0%	0%	1.3%
Asian Alone	1.4%	1.6%	4.1%	3.0%
Pacific Islander Alone	0.1%	0.1%	0.1%	0.1%
Some Other Race Alone	3.4%	2.5%	2.1%	4.9%
Two or More Races	3.0%	2.0%	4.2%	2.6%
Hispanic Origin	6.7%	5.5%	7.1%	9.5%
Diversity Index	63.2	59.6	62.3	59.6

Source: ESRI

2018 Educational Attainment

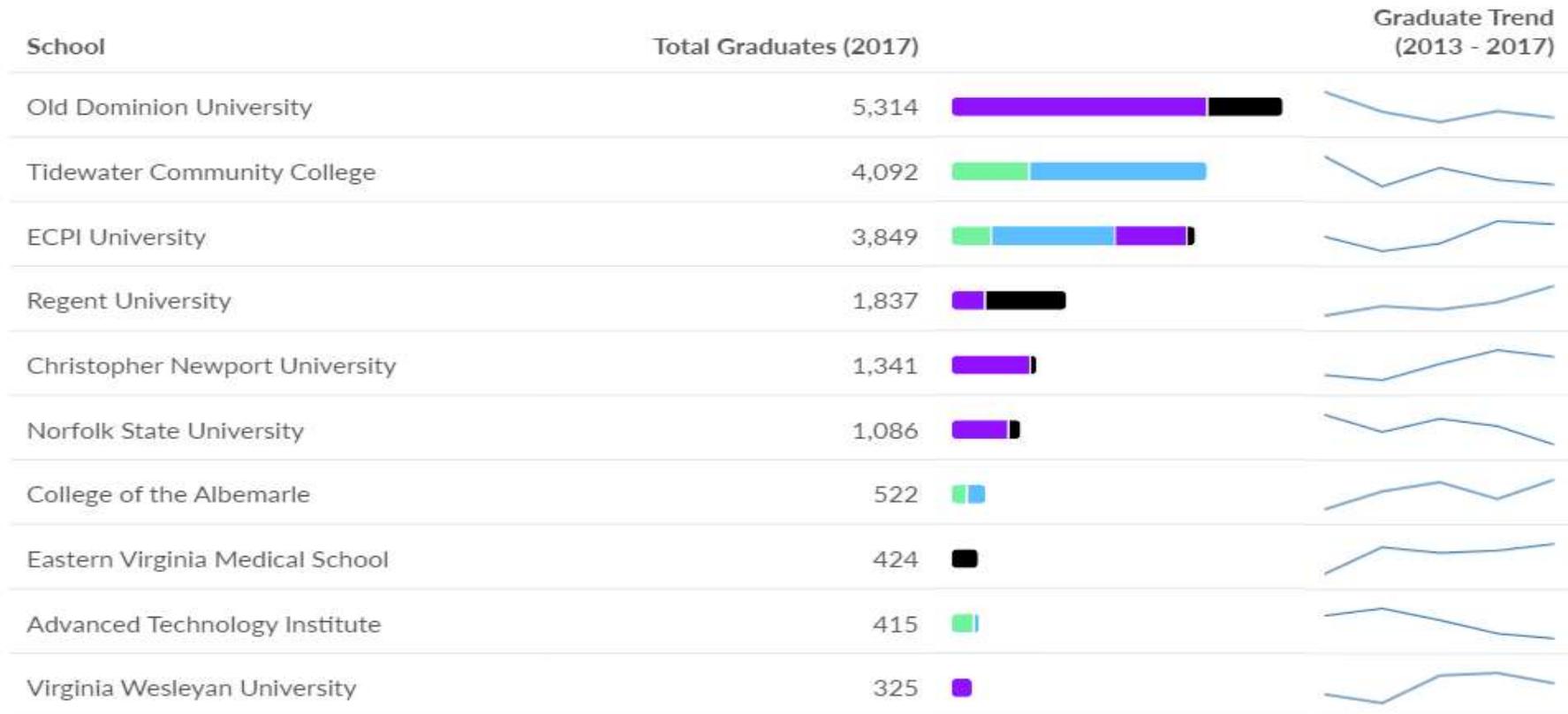
■ Elizabeth City, NC ■ Pasquotank County, NC ■ VA Beach-Norfolk-Newport News VA-NC ■ North Carolina



Source: ESRI

Laborshed Region Educational Pipeline

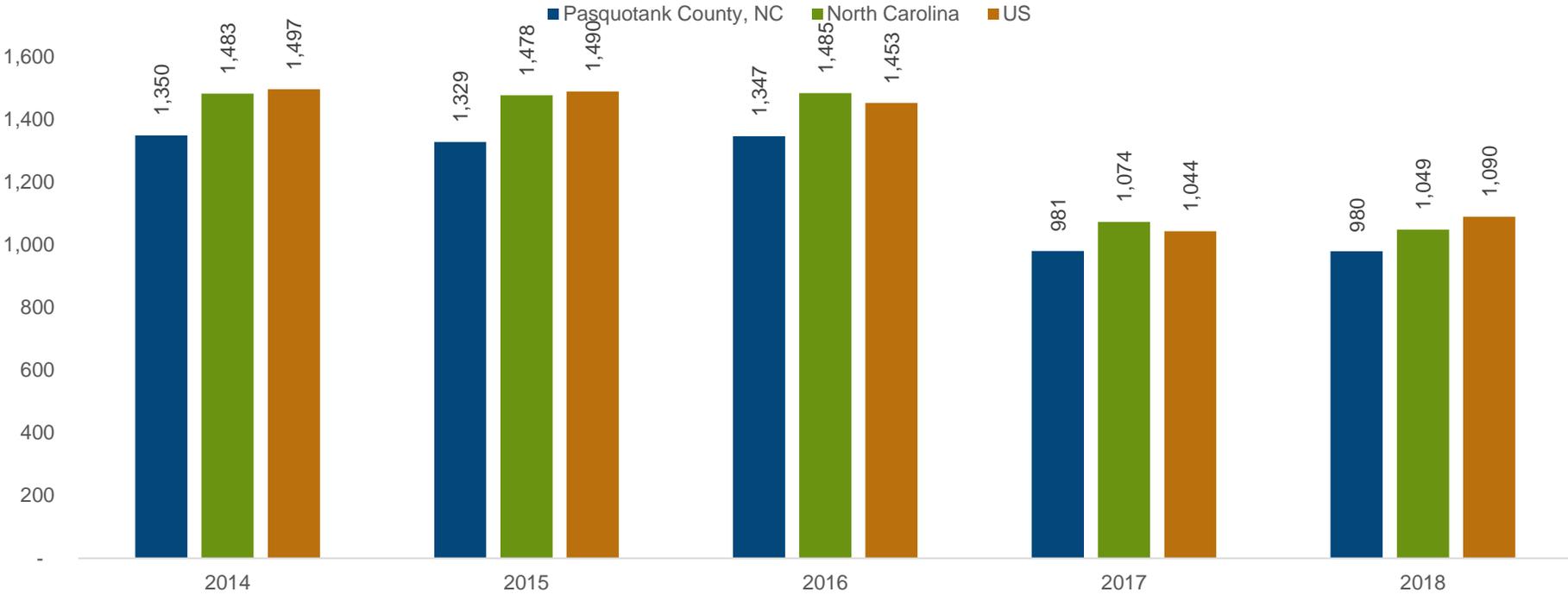
In 2017, there were 22,084 graduates in Elizabeth City Laborshed. This pipeline has shrunk by 3% over the last 5 years. The highest share of these graduates come from "Social Sciences, General", Licensed Practical/Vocational Nurse Training, and "Psychology, General".



Source: EMSI
● Certificate ● Associate's ● Bachelor's ● Master's or Higher

We defined the Elizabeth City laborshed as Pasquotank, Perquimans, Camden, Chowan, Currituck, Gates, Counties and Chesapeake, Norfolk, Newport News, Virginia Beach and Portsmouth (VA).

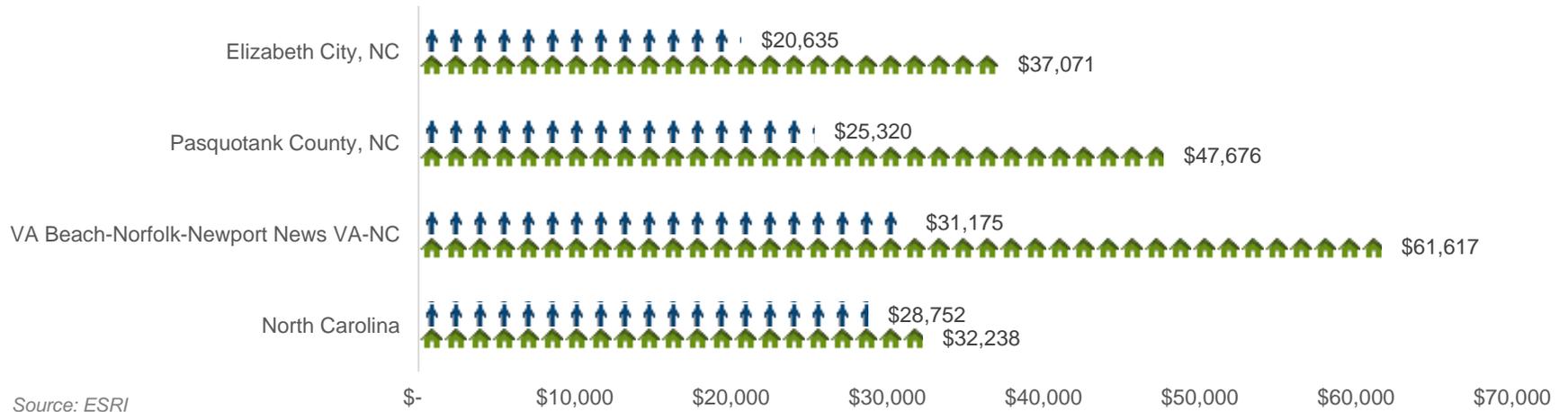
SAT Scores



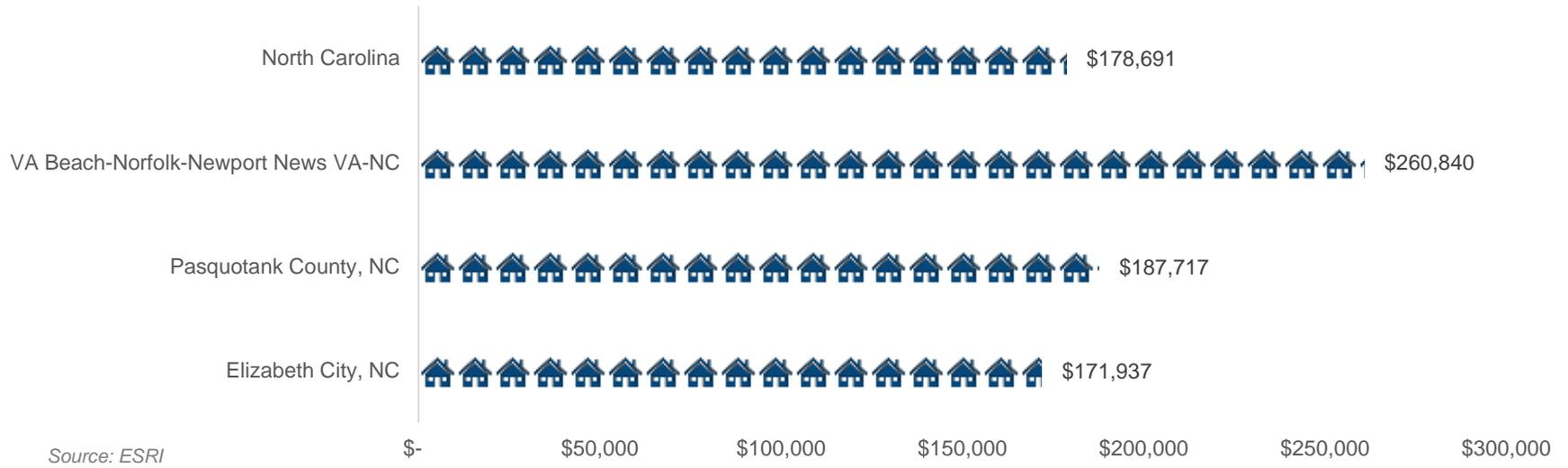
Source: ESRI

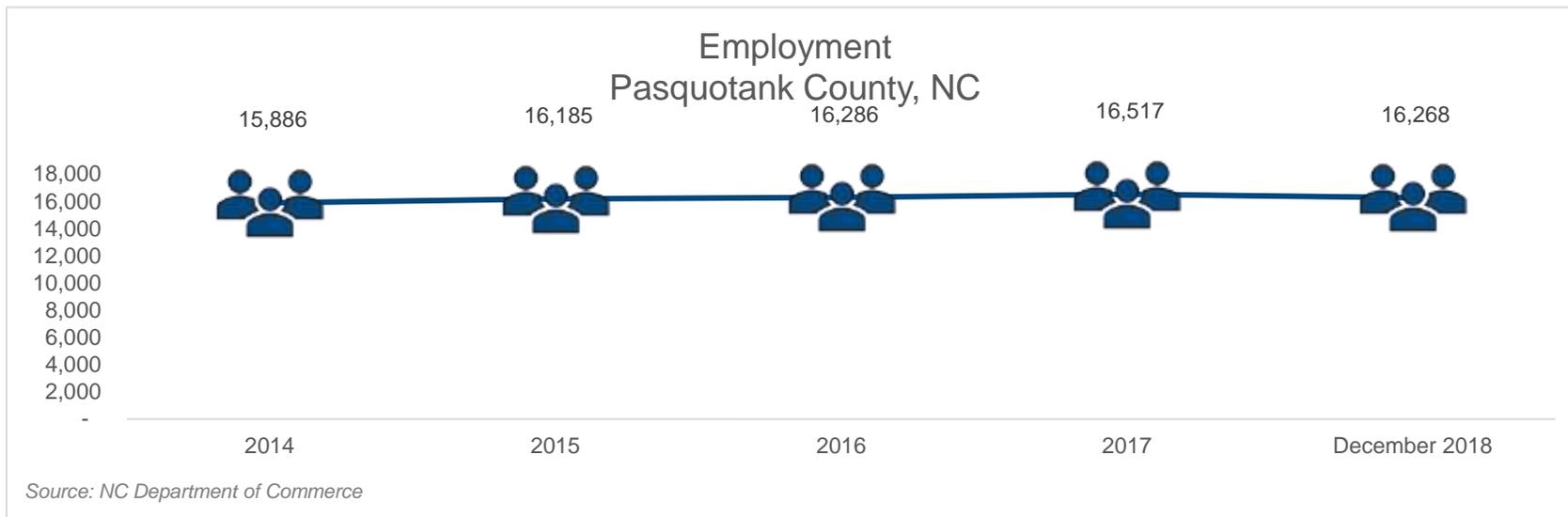
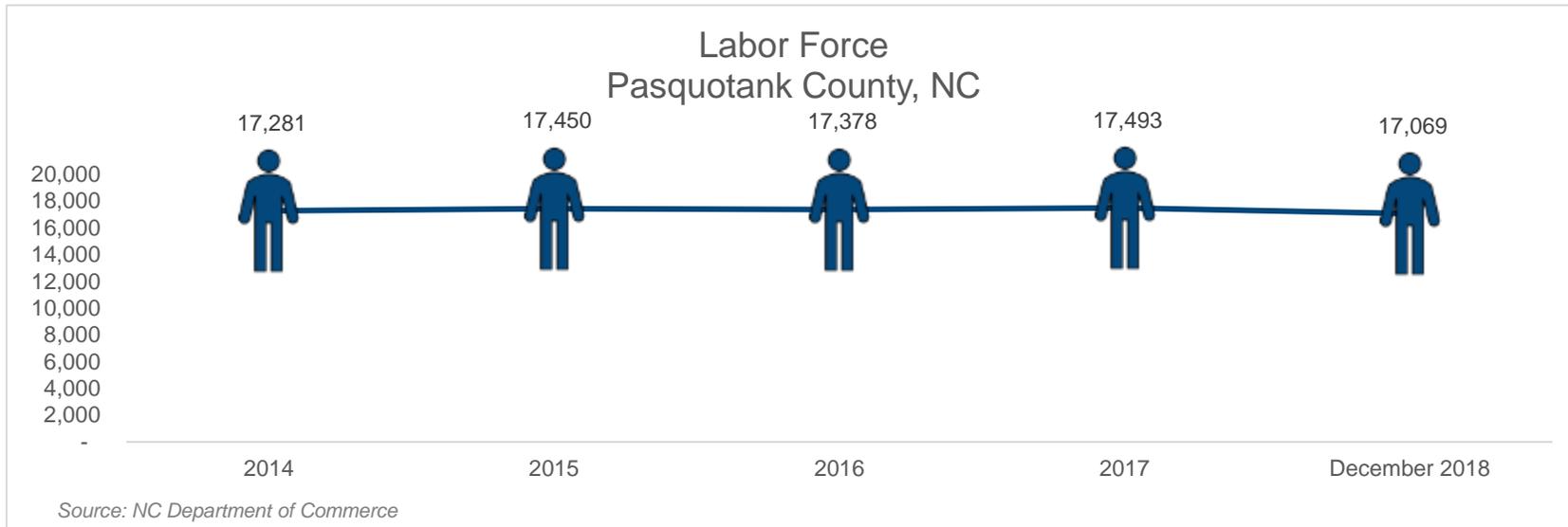
2018 Income

• Per Capita Income * Median Household Income



2018 Median Home Value





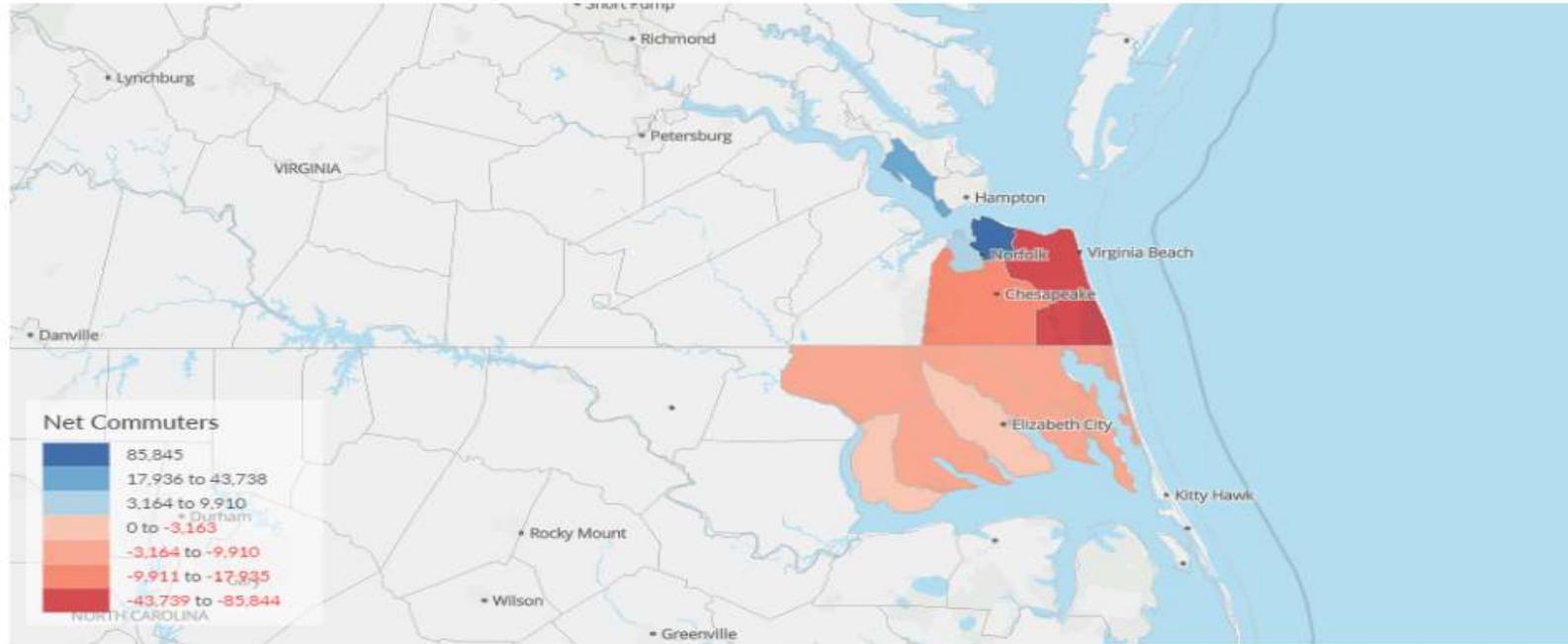
Elizabeth City/Pasquotank County Commuting

<i>Inbound Workers</i>			<i>Outbound Workers</i>		
County/Place	# of Workers	% of County Workers	County/Place	# of Workers	% of County Workers
Portsmouth	25	0.5%	Newport News	37	0.8%
Norfolk	29	0.6%	Williamsburg	41	0.9%
Suffolk	29	0.6%	Hampton	45	1.0%
Newport News	48	1.0%	VA Beach	248	5.5%
VA Beach	66	1.4%	Portsmouth	257	5.7%
Chesapeake	227	4.8%	Chesapeake	763	16.9%
Bertie	62	1.3%	Norfolk	1,118	24.8%
Dare	79	1.7%	Tyrell	29	0.6%
Gates	195	4.1%	Bertie	31	0.7%
Currituck	421	8.9%	Washington	34	0.8%
Chowan	658	13.9%	Chowan	141	3.1%
Camden	1,199	25.3%	Camden	326	7.2%
Perquimans	1,706	36.0%	Perquimans	435	9.7%
			Currituck	460	10.2%
			Dare	469	10.4%
			** Pitt	31	0.7%
			** Wake	38	0.8%
<i>Source: 2009-2013 ACS 5-YR Estimate</i>			Note: ** = Noncontiguous Counties		
<i>Journey to Work</i>					

We defined the Elizabeth City laborshed at Pasquotank, Perquimans, Camden, Chowan, Currituck, Gates, Counties and Chesapeake, Norfolk, Newport News, Virginia Beach and Portsmouth (VA).

Place of Work vs Place of Residence

Understanding where talent in the region currently works compared to where talent lives can help you optimize site decisions.



Where Talent Works

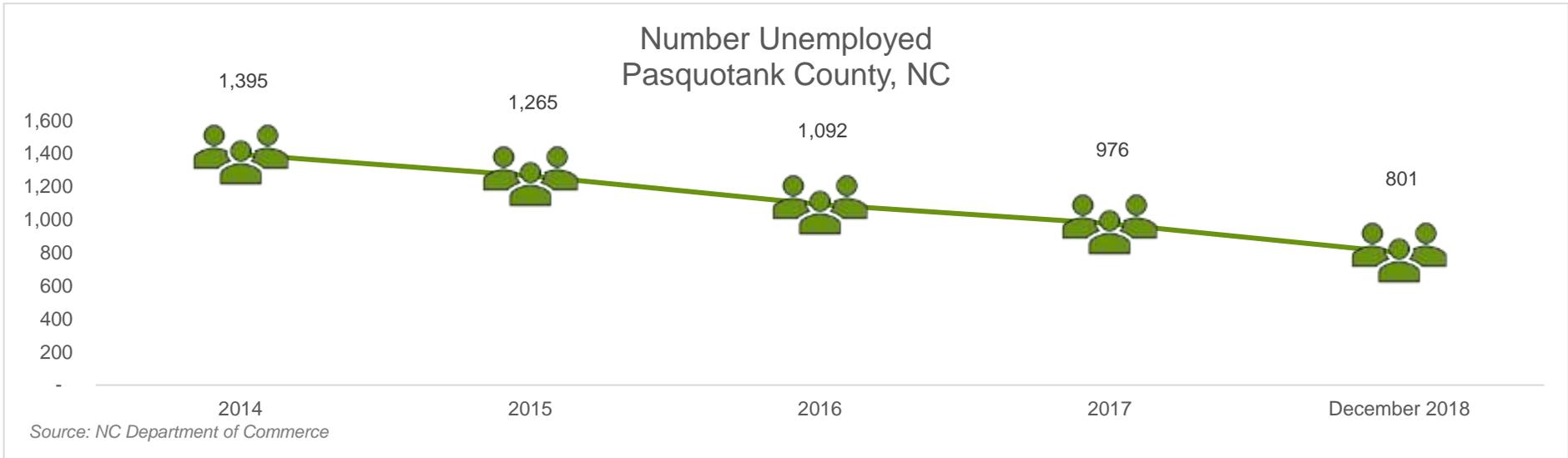
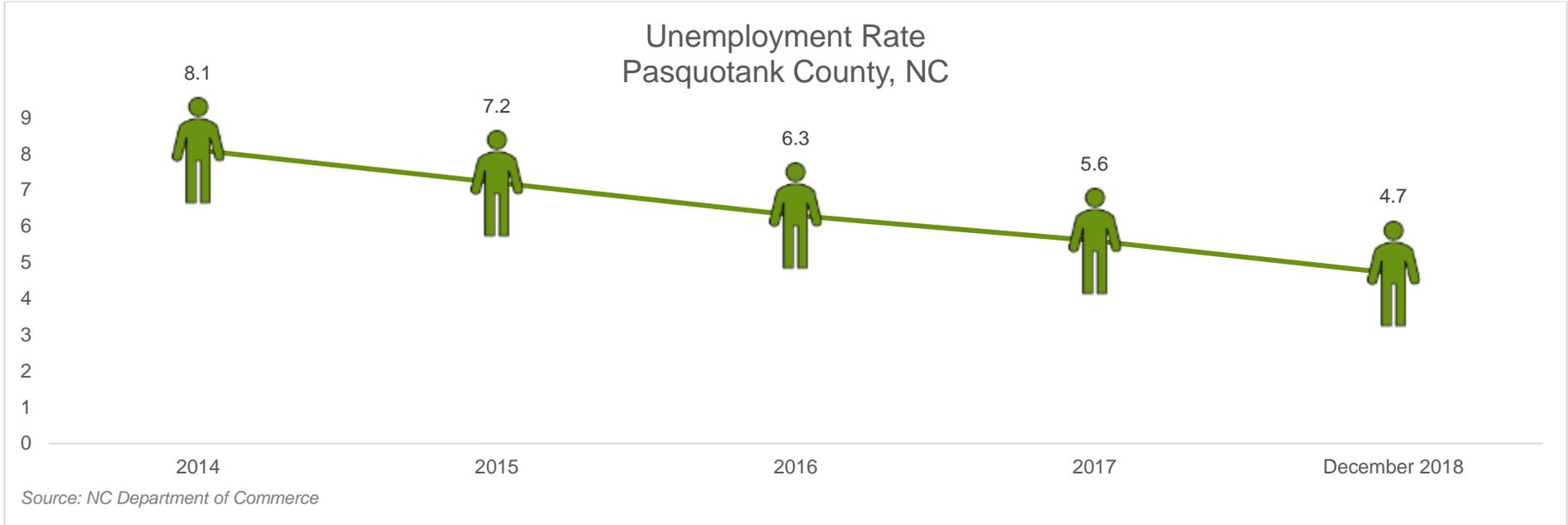
County	Name	2018 Employment
51810	Virginia Beach City County, VA	210,649
51710	Norfolk City County, VA	190,148
51700	Newport News City County, VA	113,830
51550	Chesapeake City County, VA	111,151
51740	Portsmouth City County, VA	53,465

Where Talent Lives

County	Name	2018 Workers
51810	Virginia Beach City County, VA	254,389
51550	Chesapeake City County, VA	121,062
51710	Norfolk City County, VA	104,303
51700	Newport News City County, VA	95,893
51740	Portsmouth City County, VA	50,019

Source: EMSI

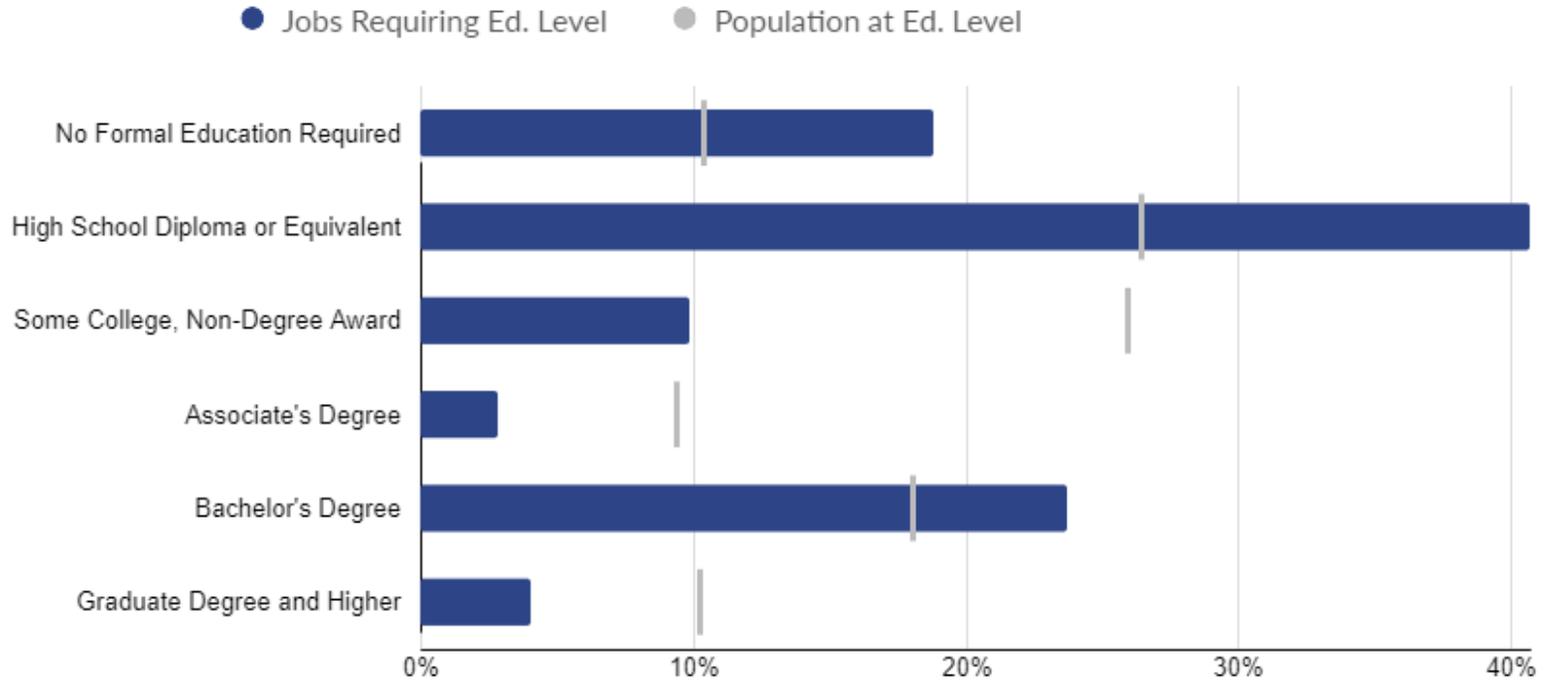
Laborshed Overview: Pasquotank, Perquimans, Chowan, Camden, Currituck, Gates Counties & Chesapeake, Norfolk, Newport News, Virginia Beach, and Portsmouth VA	
Population	1,329,498
Population Growth 2013-2018	1.1%
Veterans	155,256
Labor Force	640,951
Employment	621,104
Bachelor's Degree	18%
Associate's Degree	9.3%, 1.3% above national average
Cost of Living	99.4 (100 index)
Largest Employment Sectors	Government, Health Care and Social Assistance, Retail, Accommodation and Food Service, and Manufacturing
<i>Source: EMSI</i>	



Laborshed Region Total Unemployed: 19,847

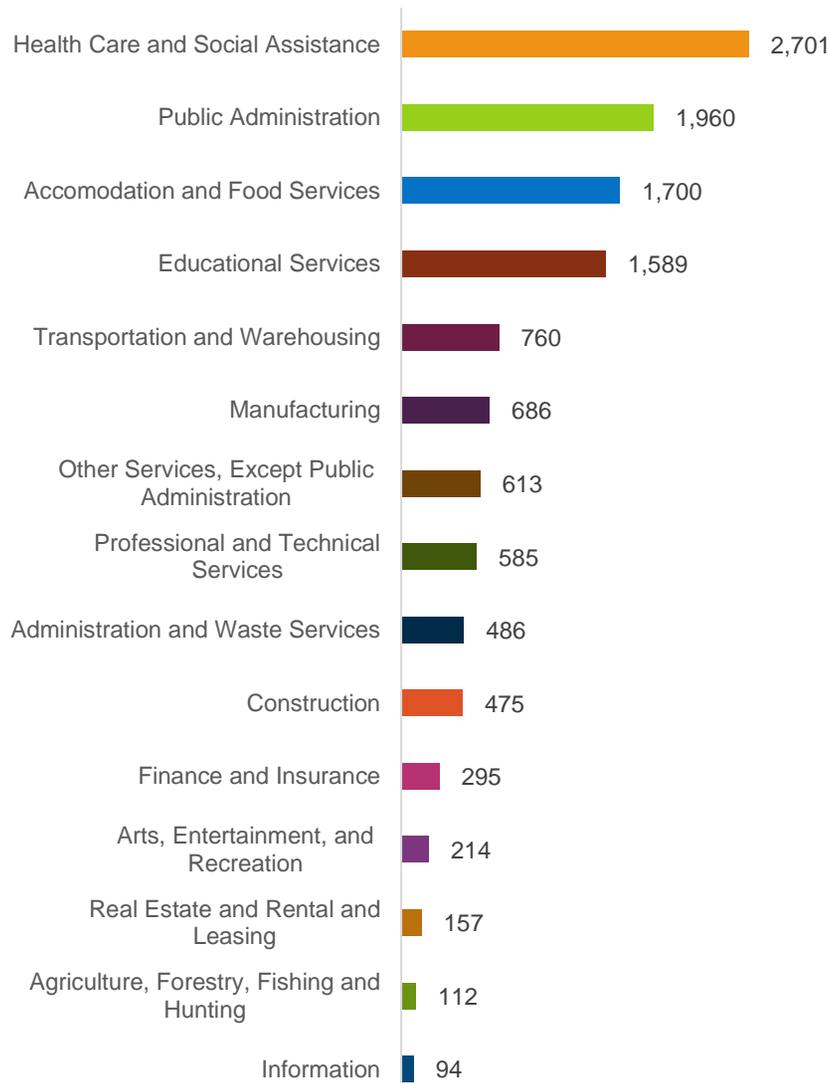
Laborshed Region Underemployment 2018

Underemployment



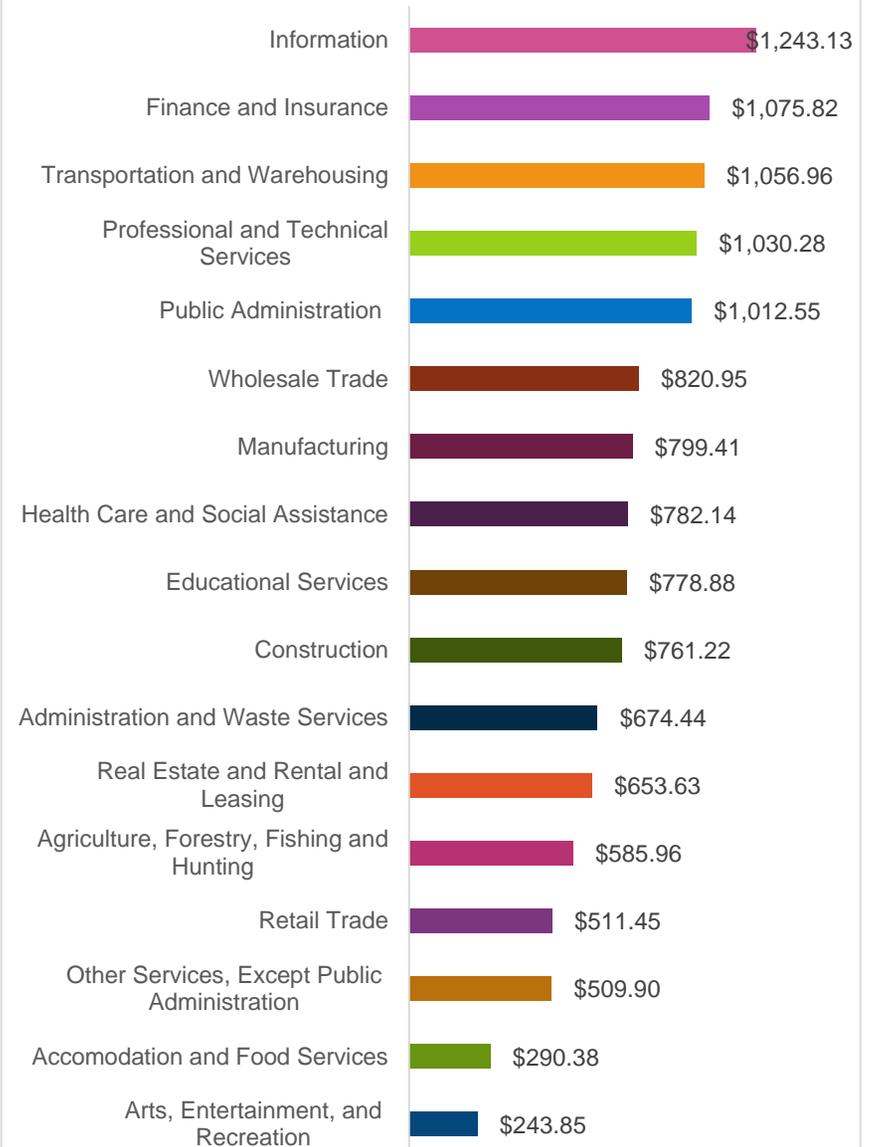
Source: EMSI

Q3 2018 Pasquotank County Employment by Industry



Source: NC Department of Commerce - 500 1,000 1,500 2,000 2,500 3,000

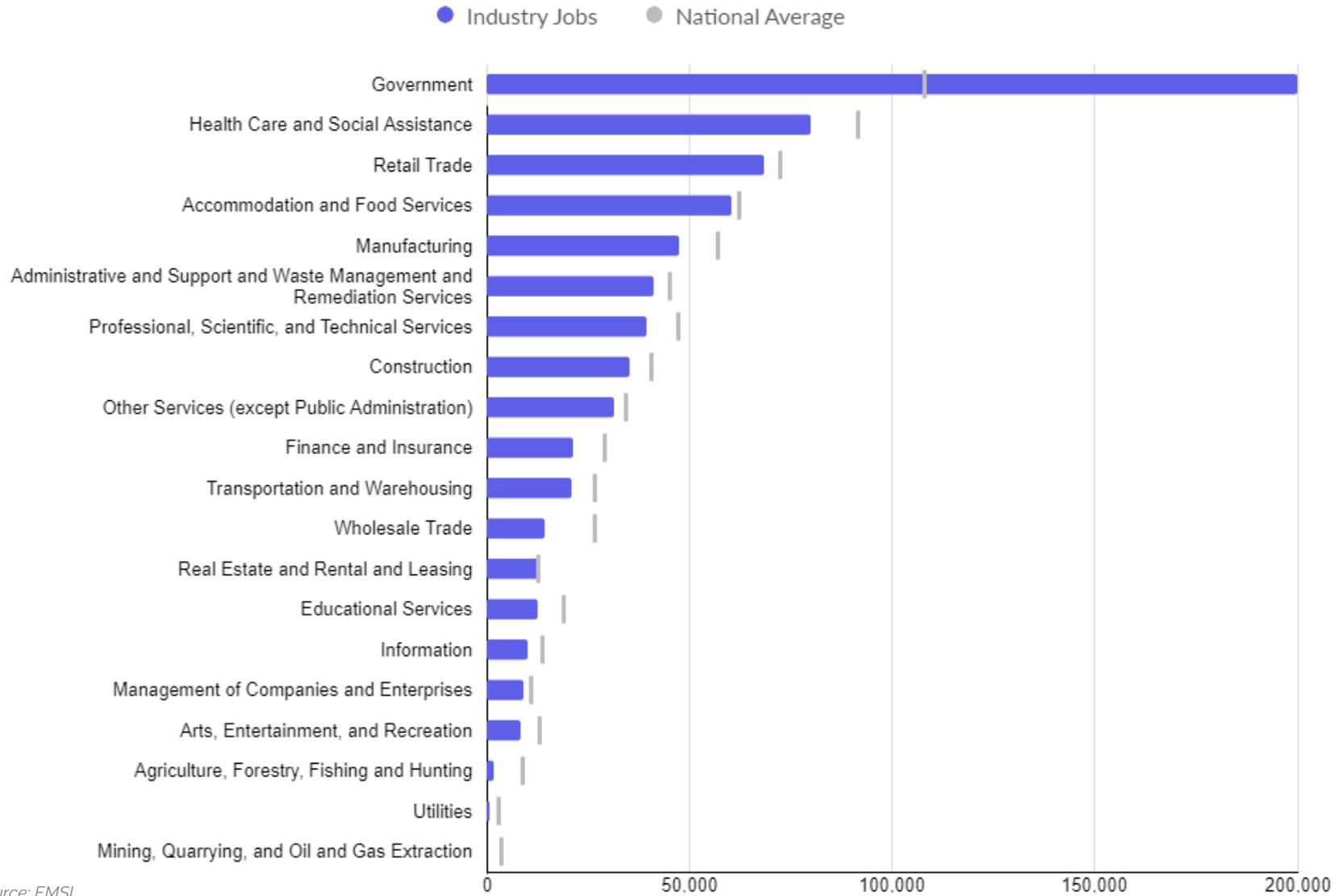
Q3 2018 Pasquotank County Wages by Industry



Source: NC Department of Commerce \$- \$200 \$400 \$600 \$800 \$1,000 \$1,200 \$1,400

Laborshed Region Largest Employment Sectors

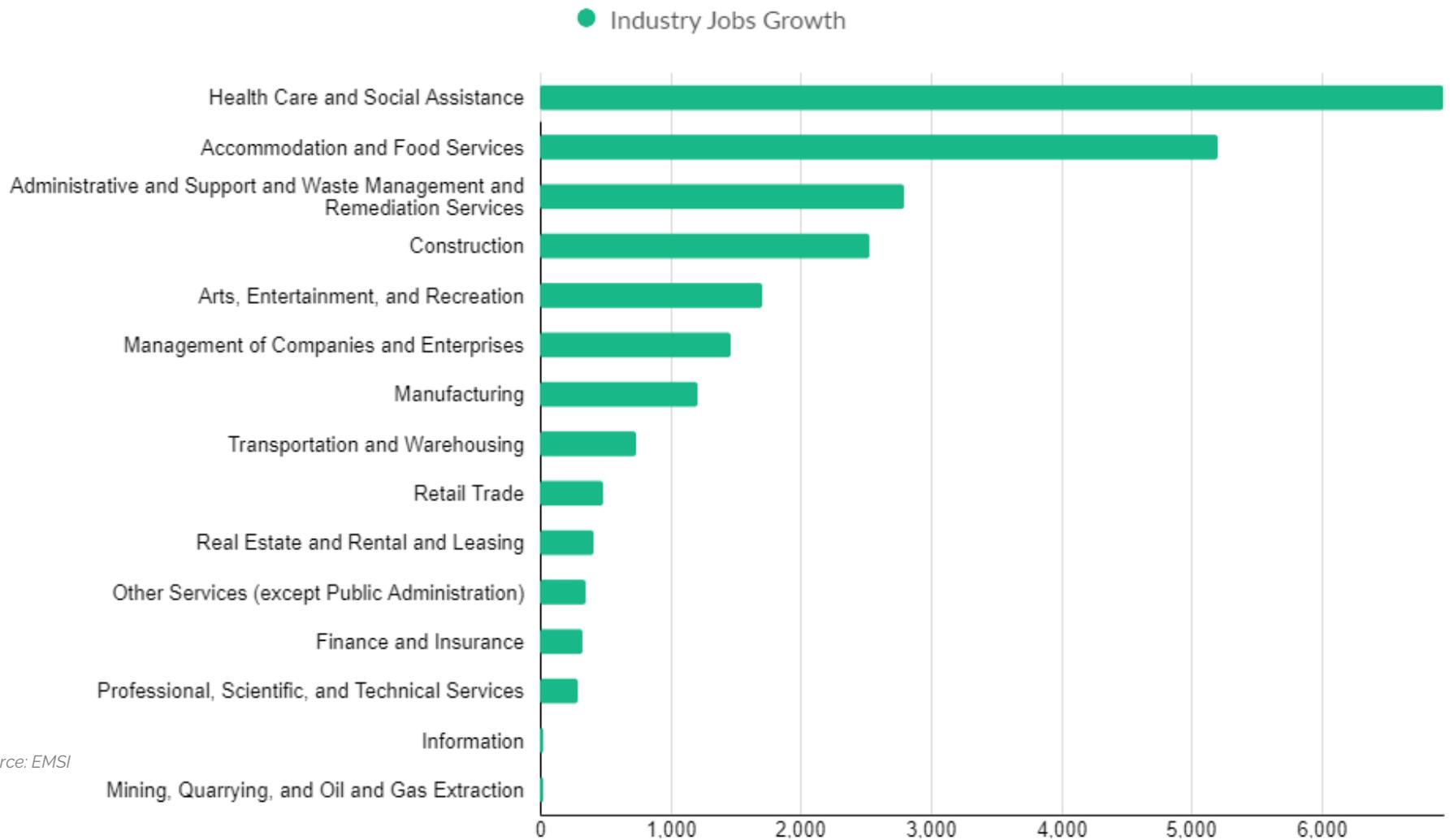
Largest Industries



Source: EMSI

Laborshed Region Top Growing Industry Sectors 2013-2018

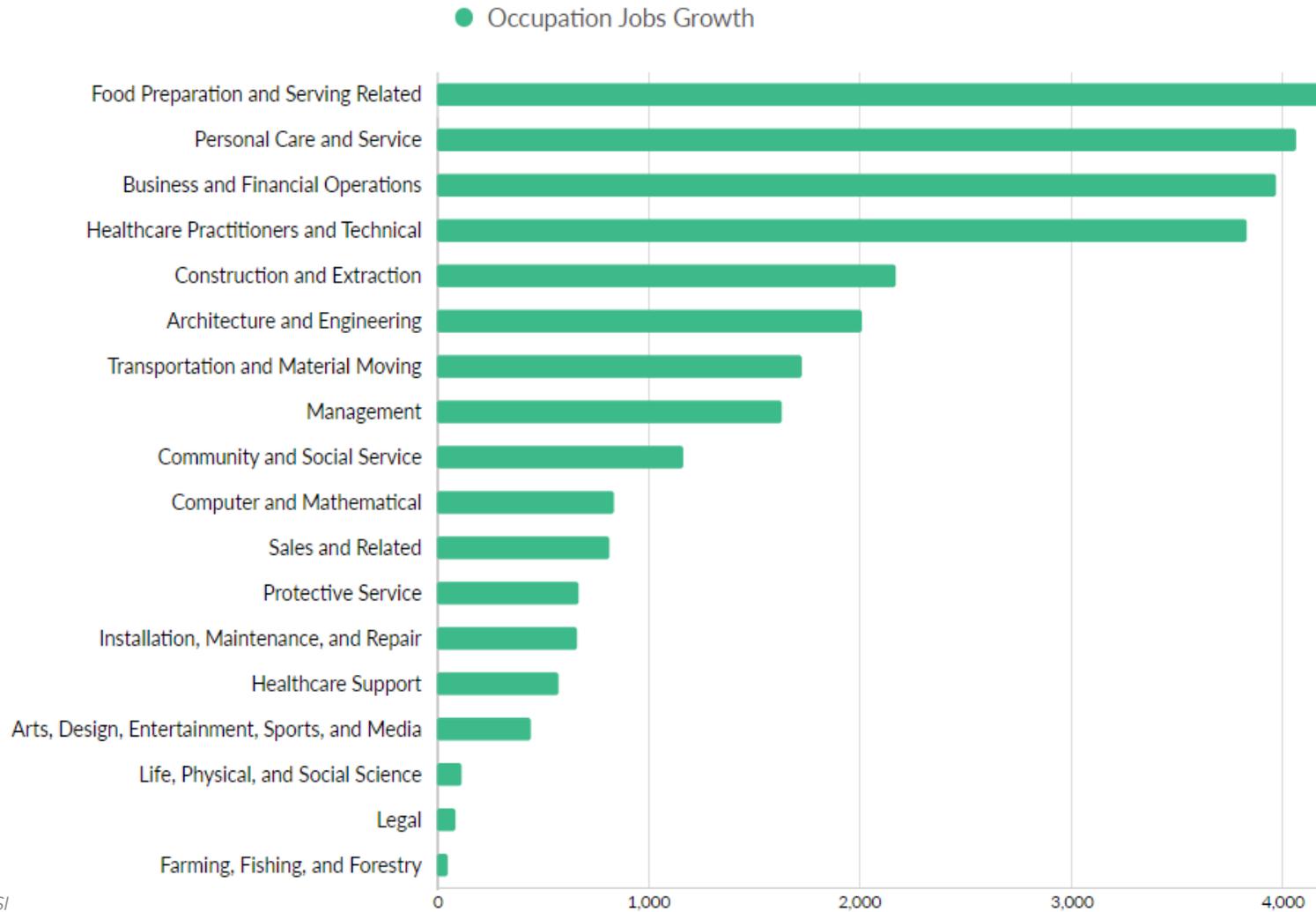
Top Growing Industries



Source: EMSI

Laborshed Region Top Growing Occupations 2013-2018

Top Growing Occupations



Source: EMSI

Top 25 Employers - Pasquotank County

Rank	Company	Industry	Employment range
1	ELIZABETH CITY PASQUOTANK COUNTY BD	Education & Health Services	500-999
2	SENTARA INTERNAL MEDICINE PHYSICIAN	Education & Health Services	500-999
3	US DEPARTMENT OF HOMELAND SECURITY	Public Administration	500-999
4	ELIZABETH CITY STATE UNIVERSITY	Education & Health Services	250-499
5	COUNTY OF PASQUOTANK	Public Administration	250-499
6	WAL-MART ASSOCIATES, INC.	Trade, Transportation, & Utilities	250-499
7	DEPT OF PUBLIC SAFETY	Public Administration	250-499
8	COLLEGE OF THE ALBEMARLE	Education & Health Services	250-499
9	CITY OF ELIZABETH CITY	Public Administration	250-499
10	FOOD LION	Trade, Transportation, & Utilities	250-499
11	URS FEDERAL SERVICES INC	Trade, Transportation, & Utilities	250-499
12	OLLIE'S BARGAIN OUTLET	Trade, Transportation, & Utilities	250-499
13	ARHS	Education & Health Services	250-499
14	MONEYSWORTH LINEN SERVICES INC	Other Services	100-249
15	ELIZABETH CITY HEALTH & REHABILITAT	Education & Health Services	100-249
16	LOWES HOME CENTERS INC	Trade, Transportation, & Utilities	100-249
17	MCDONALDS	Leisure & Hospitality	100-249
18	Y-TECH SERVICES INC	Trade, Transportation, & Utilities	100-249
19	YMCA OF SOUTH HAMPTON ROADS	Leisure & Hospitality	100-249
20	WHITESTONE EAST INC	Professional & Business Services	100-249
21	J W JONES LUMBER CO INC	Manufacturing	100-249
22	CONCORDIA TRANSITIONAL CARE AND REH	Education & Health Services	100-249
23	ALBEMARLE EYE CENTER PLLC	Education & Health Services	100-249
24	D R S TECHNICAL SERVICES	Trade, Transportation, & Utilities	100-249
25	ALBEMARLE PHYSICIAN SERVICES INC	Education & Health Services	50-99

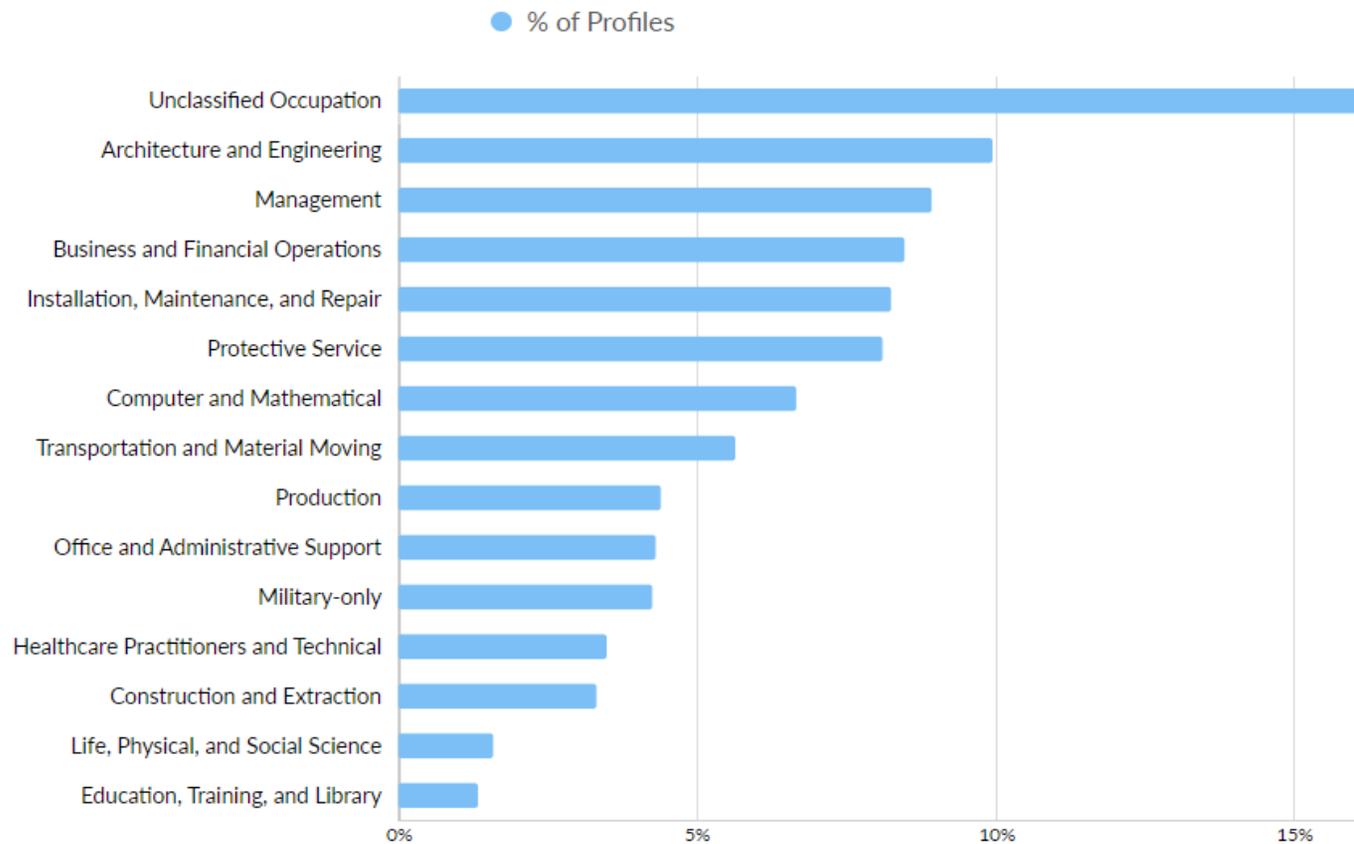
Source: NC Department of Commerce

What jobs do they employ currently?

Top 15 Job Types Currently Employed at United States Department of the Navy

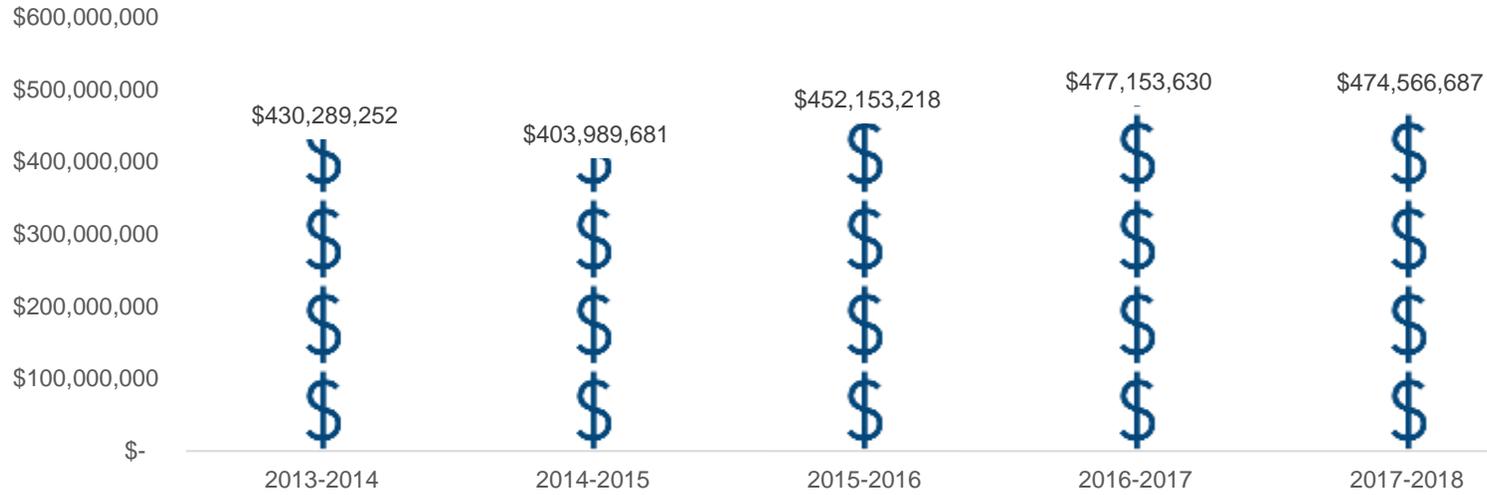


By analyzing the online profiles of people who work at United States Department of the Navy, we can estimate the relative size of each job type within the company. This helps us understand how the company is currently structured.



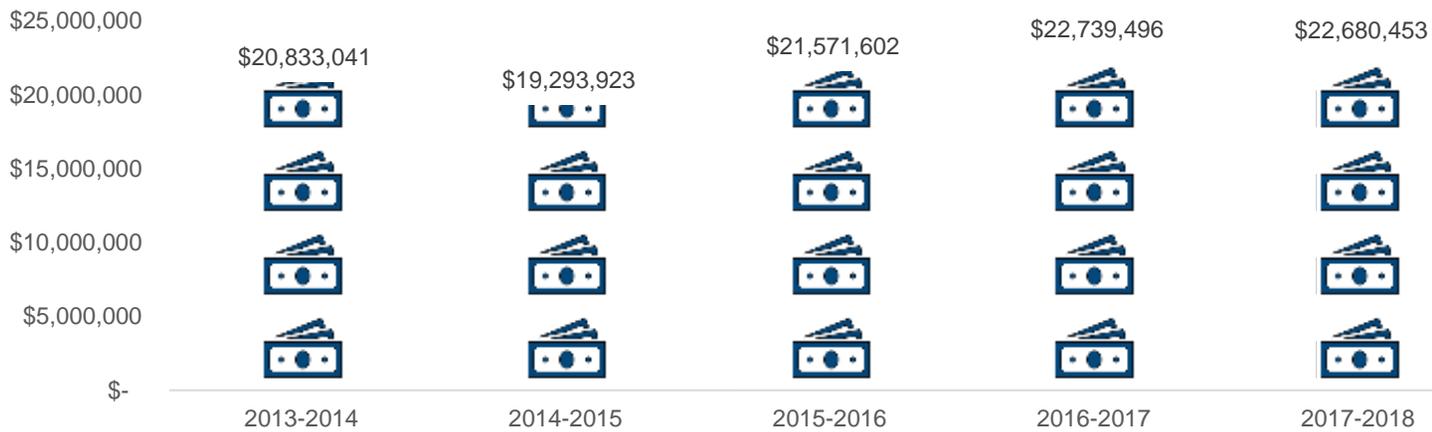
Source: EMSI

Pasquotank County Taxable Sales



Source: NC Department of Revenue

Pasquotank County Gross Collections



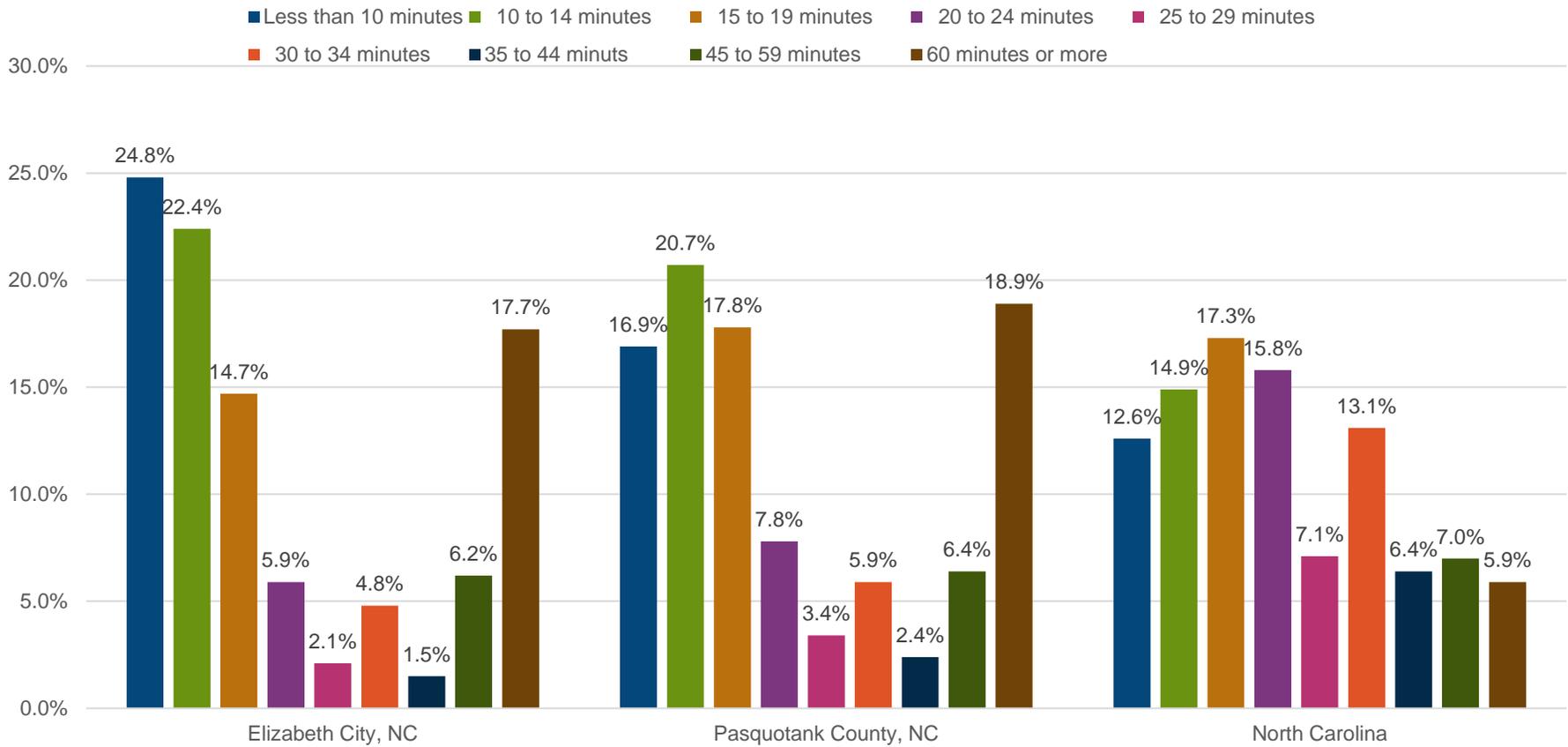
Source: NC Department of Revenue

2017 Pasquotank County Retail Sales



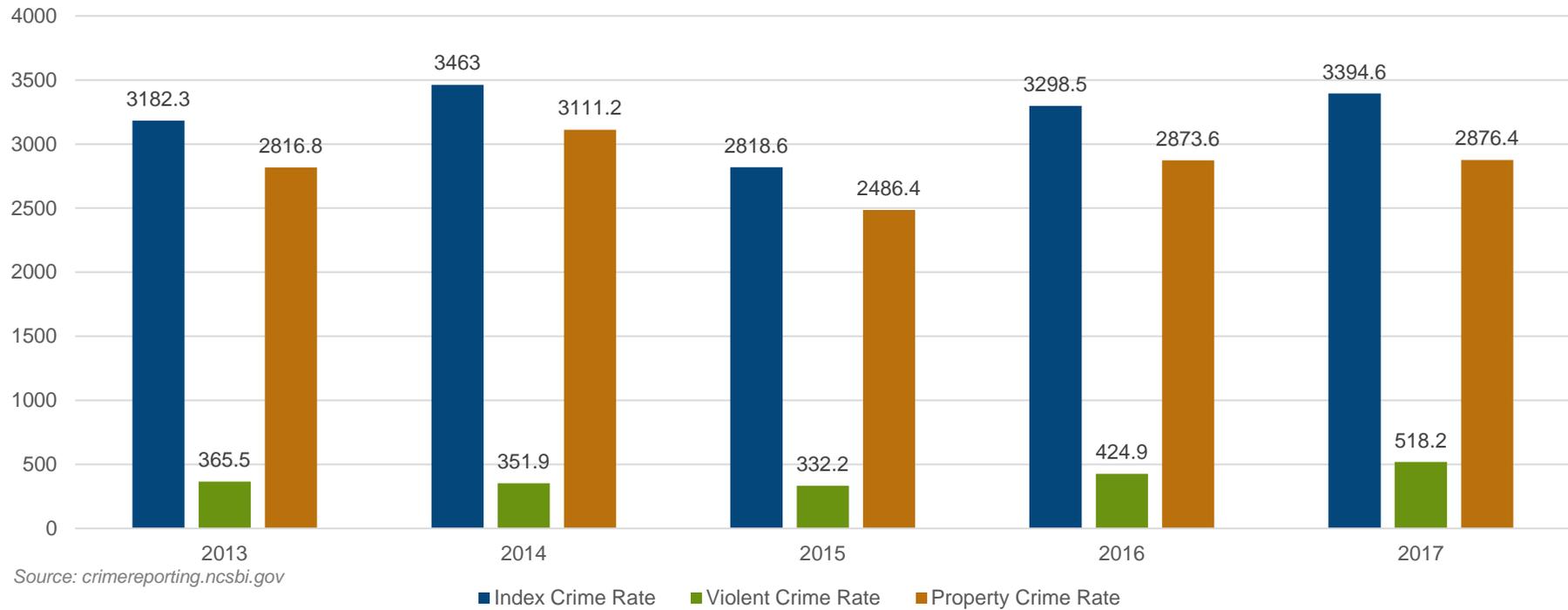
Source: NC Department of Revenue

2017 Pasquotank County Commute Times



Source: US Census

Pasquotank County Crime Rates per 100,000



Pasquotank County 2013-2017 Establishment Data

Gained	2013	2017
Total	1,275	1,434
Start Ups	30.6%	81.4%
Expansion Start Ups	18.7%	6.6%
Expansions	48.7%	11.0%
Move In	2.0%	1.0%
Lost		
Total	1,115	1,402
Closings	66.5%	80.3%
Contractions	29.0%	17.3%
Move Out	4.5%	2.4%

Source: Your Economy Data

Pasquotank County 2013-2017 Employment Stages

ESTABLISHMENTS	2013	% of TOTAL	2017	% of TOTAL
ALL	1,900	100	1,947	100
Self-Employed (1)	222	11.7	252	12.9
Stage 1 (2-9)	1,306	68.7	1,325	68.1
Stage 2 (10-99)	355	18.7	350	18
Stage 3 (100-499)	16	0.8	18	0.9
Stage 4 (500+)	1	0.1	2	0.1

Source: Your Economy Data

2016-2017 % Change Pasquotank County Tourism Statistics

Travel Employment



Travel Payroll



Travel Expenditures



0.0% 5.0% 10.0% 15.0% 20.0% 25.0% 30.0%

Source: data.osbm.state.nc.us



Retail MarketPlace Profile

3 Counties 8
Camden County, NC (37029) et al.
Geography: County

Prepared by Esri

Summary Demographics

2019 Population	65,349
2019 Households	25,145
2019 Median Disposable Income	\$43,547
2019 Per Capita Income	\$27,010

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$787,443,282	\$781,198,298	\$6,244,984	0.4	399
Total Retail Trade	44-45	\$713,799,041	\$718,438,885	-\$4,639,844	-0.3	302
Total Food & Drink	722	\$73,644,241	\$62,759,413	\$10,884,828	8.0	97

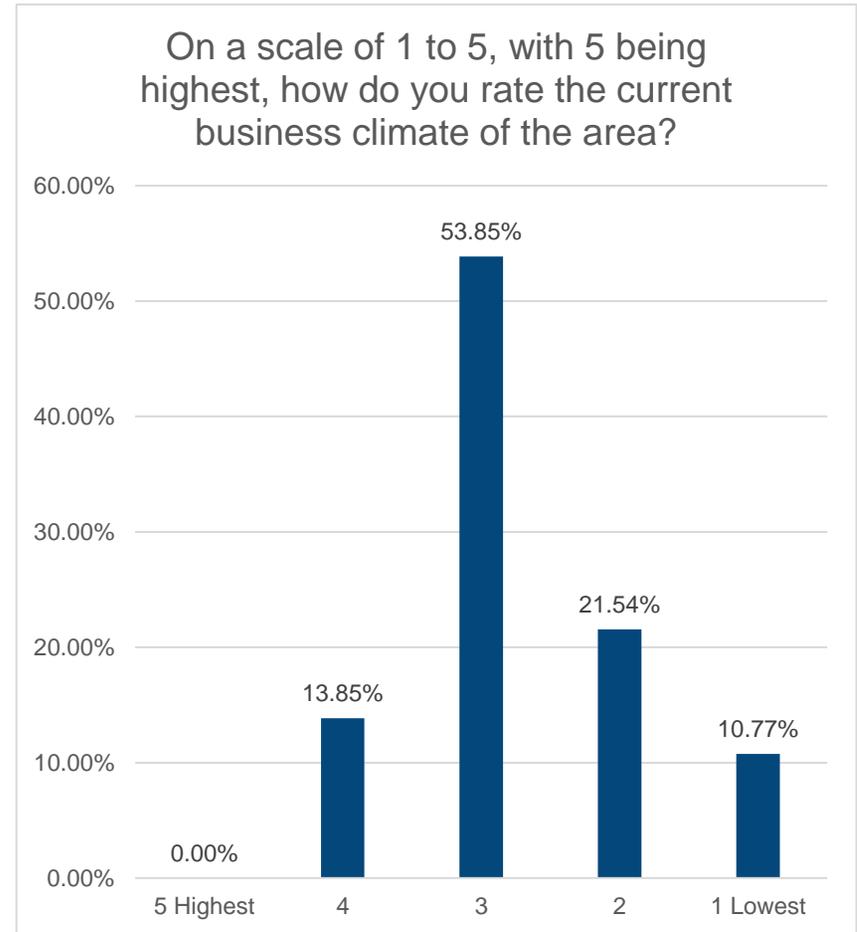
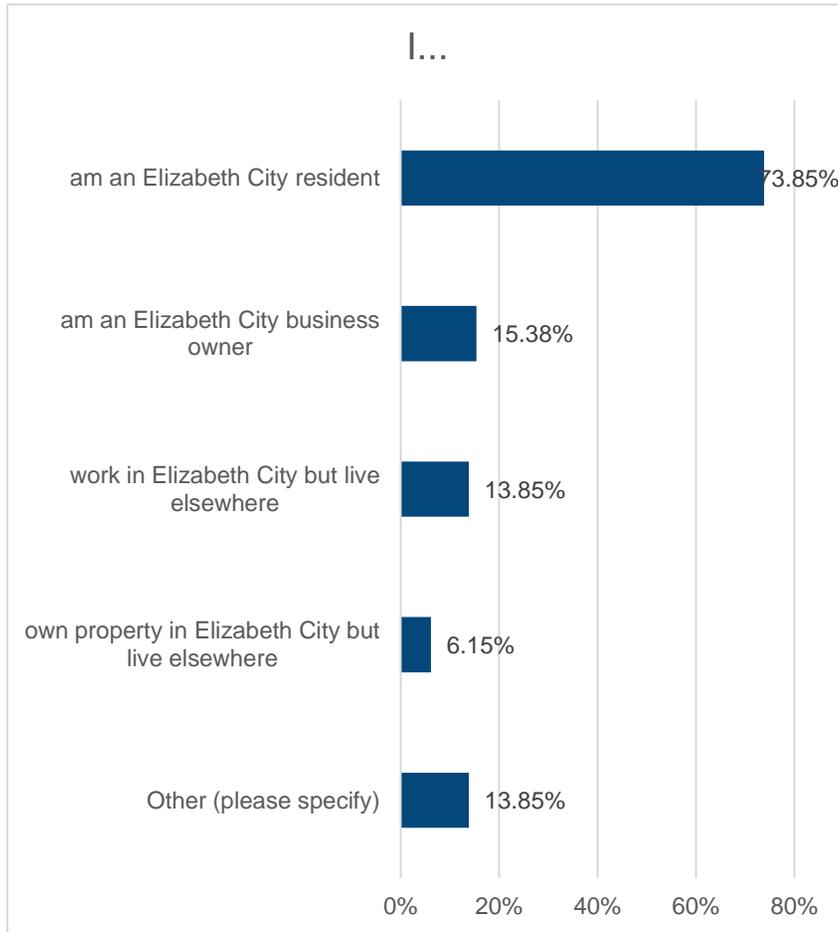
2017 Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$156,612,588	\$198,011,816	-\$41,399,228	-11.7	51
Automobile Dealers	4411	\$128,598,783	\$175,730,813	-\$47,132,030	-15.5	25
Other Motor Vehicle Dealers	4412	\$12,874,258	\$9,015,772	\$3,858,486	17.6	9
Auto Parts, Accessories & Tire Stores	4413	\$15,139,547	\$13,265,231	\$1,874,316	6.6	17
Furniture & Home Furnishings Stores	442	\$26,868,709	\$5,707,539	\$21,161,170	65.0	9
Furniture Stores	4421	\$16,198,623	\$4,970,664	\$11,227,959	53.0	3
Home Furnishings Stores	4422	\$10,670,086	\$736,875	\$9,933,211	87.1	6
Electronics & Appliance Stores	443	\$20,554,403	\$7,622,889	\$12,931,514	45.9	7
Bldg Materials, Garden Equip. & Supply Stores	444	\$52,730,201	\$43,907,027	\$8,823,174	9.1	27
Bldg Material & Supplies Dealers	4441	\$49,379,881	\$37,854,682	\$11,525,199	13.2	19
Lawn & Garden Equip & Supply Stores	4442	\$3,350,320	\$6,052,345	-\$2,702,025	-28.7	8
Food & Beverage Stores	445	\$122,973,202	\$99,411,439	\$23,561,763	10.6	37
Grocery Stores	4451	\$114,347,800	\$94,694,667	\$19,653,133	9.4	26
Specialty Food Stores	4452	\$4,481,190	\$1,216,772	\$3,264,418	57.3	8
Beer, Wine & Liquor Stores	4453	\$4,144,212	\$3,500,000	\$644,212	8.4	3
Health & Personal Care Stores	446,4461	\$45,784,893	\$43,121,329	\$2,663,564	3.0	21
Gasoline Stations	447,4471	\$77,311,856	\$101,727,300	-\$24,415,444	-13.6	28
Clothing & Clothing Accessories Stores	448	\$32,343,793	\$12,663,194	\$19,680,599	43.7	27
Clothing Stores	4481	\$21,303,279	\$5,840,719	\$15,462,560	57.0	19
Shoe Stores	4482	\$5,174,075	\$2,658,135	\$2,515,940	32.1	3
Jewelry, Luggage & Leather Goods Stores	4483	\$5,866,439	\$4,164,340	\$1,702,099	17.0	5
Sporting Goods, Hobby, Book & Music Stores	451	\$18,499,170	\$13,069,384	\$5,429,786	17.2	22
Sporting Goods/Hobby/Musical Instr Stores	4511	\$15,696,519	\$11,871,960	\$3,824,559	13.9	18
Book, Periodical & Music Stores	4512	\$2,802,651	\$1,197,424	\$1,605,227	40.1	4
General Merchandise Stores	452	\$116,169,252	\$165,551,374	-\$49,382,122	-17.5	27
Department Stores Excluding Leased Depts.	4521	\$83,392,300	\$143,602,700	-\$60,210,400	-26.5	9
Other General Merchandise Stores	4529	\$32,776,952	\$21,948,674	\$10,828,278	19.8	18
Miscellaneous Store Retailers	453	\$31,591,729	\$21,504,709	\$10,087,020	19.0	41
Florists	4531	\$1,043,185	\$1,069,555	-\$26,370	-1.2	5
Office Supplies, Stationery & Gift Stores	4532	\$6,372,337	\$2,141,765	\$4,230,572	49.7	3
Used Merchandise Stores	4533	\$3,470,056	\$4,220,052	-\$749,996	-9.8	14
Other Miscellaneous Store Retailers	4539	\$20,706,151	\$14,073,337	\$6,632,814	19.1	19
Nonstore Retailers	454	\$12,359,245	\$6,140,885	\$6,218,360	33.6	5
Electronic Shopping & Mail-Order Houses	4541	\$8,622,632	\$0	\$8,622,632	100.0	0
Vending Machine Operators	4542	\$668,133	\$63,090	\$605,043	82.7	1
Direct Selling Establishments	4543	\$3,068,480	\$6,077,795	-\$3,009,315	-32.9	4
Food Services & Drinking Places	722	\$73,644,241	\$62,759,413	\$10,884,828	8.0	97
Special Food Services	7223	\$682,047	\$346,177	\$335,870	32.7	2
Drinking Places - Alcoholic Beverages	7224	\$4,950,153	\$565,963	\$4,384,190	79.5	3
Restaurants/Other Eating Places	7225	\$68,012,041	\$61,847,273	\$6,164,768	4.7	92

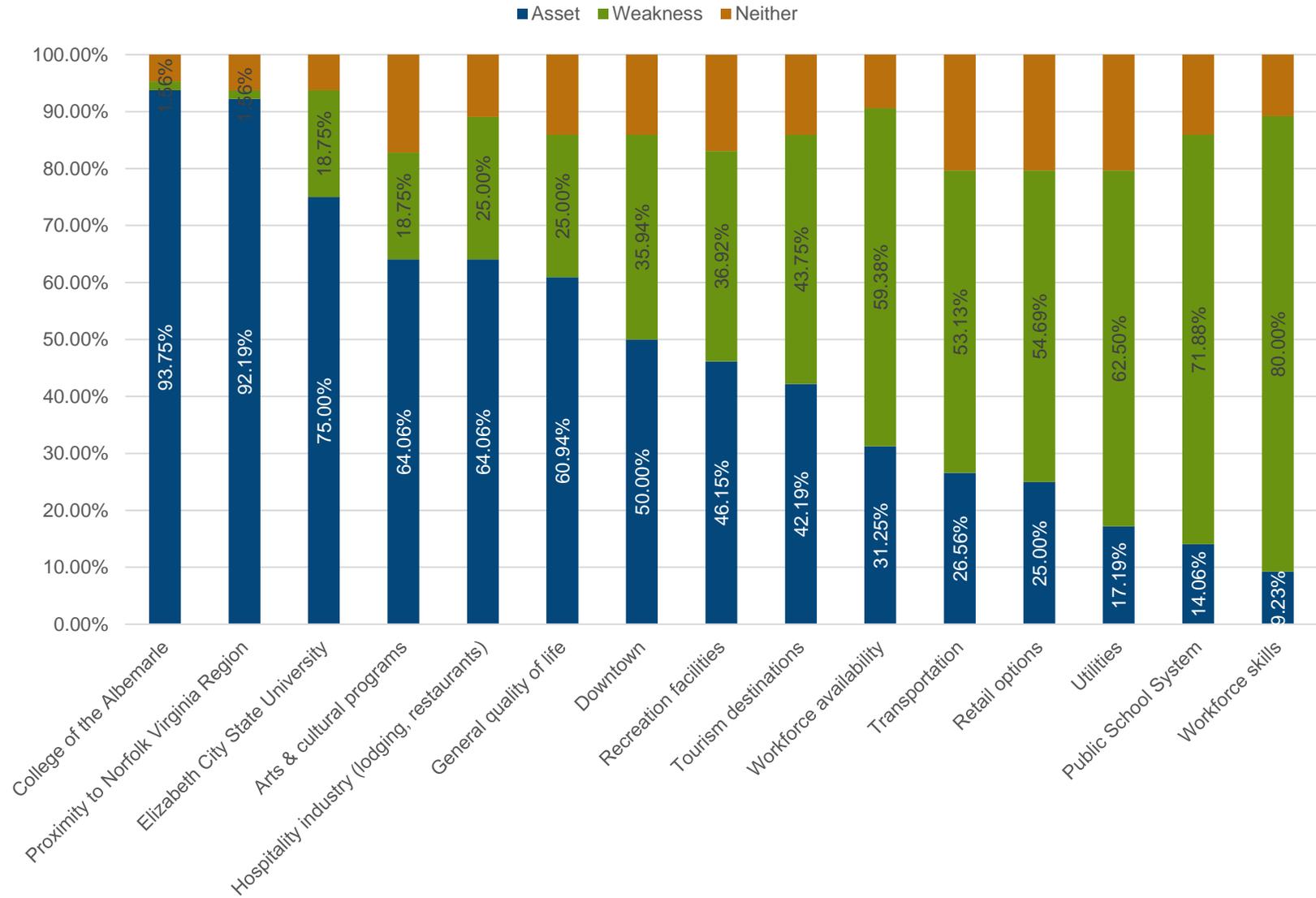
Source: Esri and Infogroup. Esri 2019 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

Appendix B: Community Survey Results

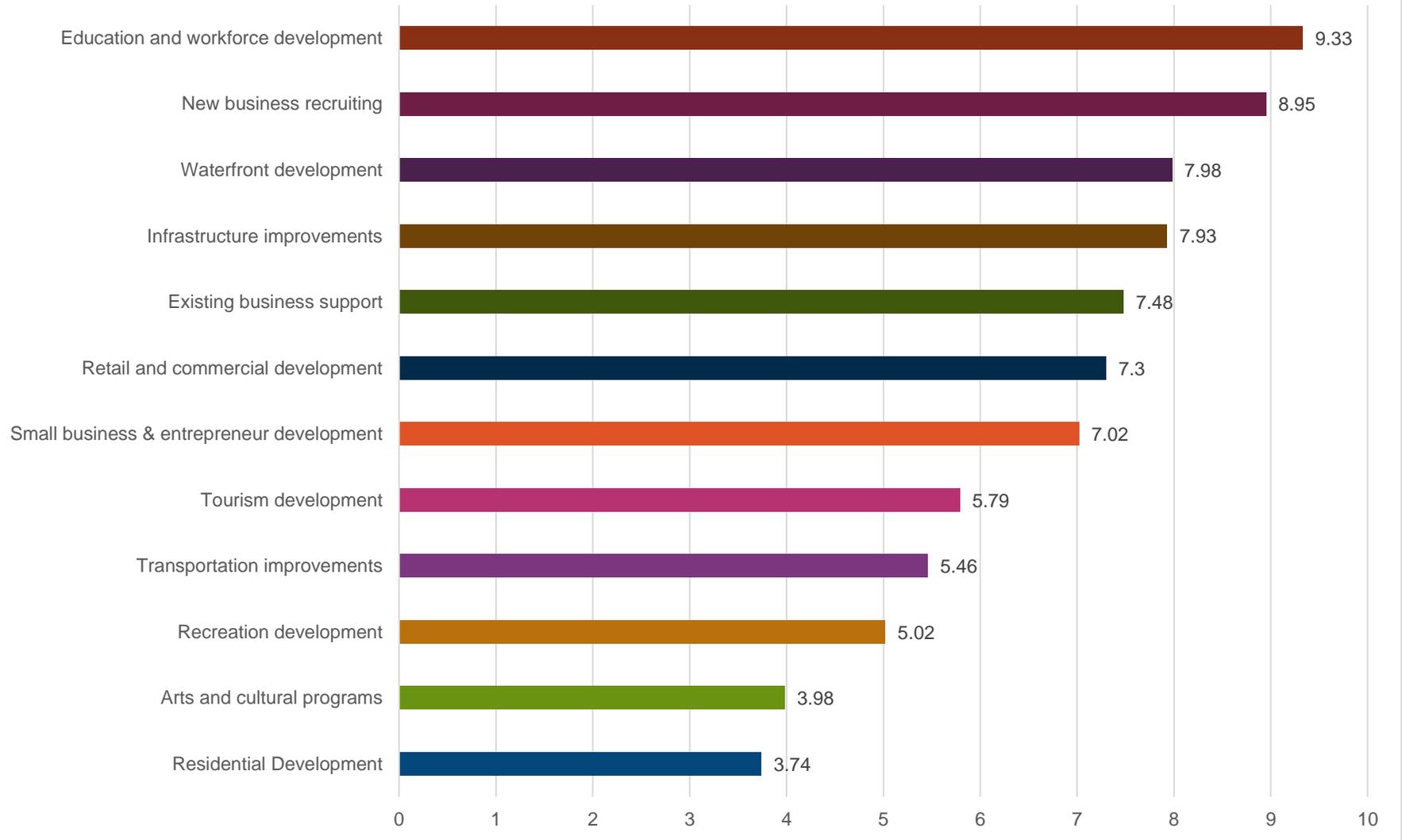
65 citizens responded to the online survey. Most are Elizabeth City residents, a



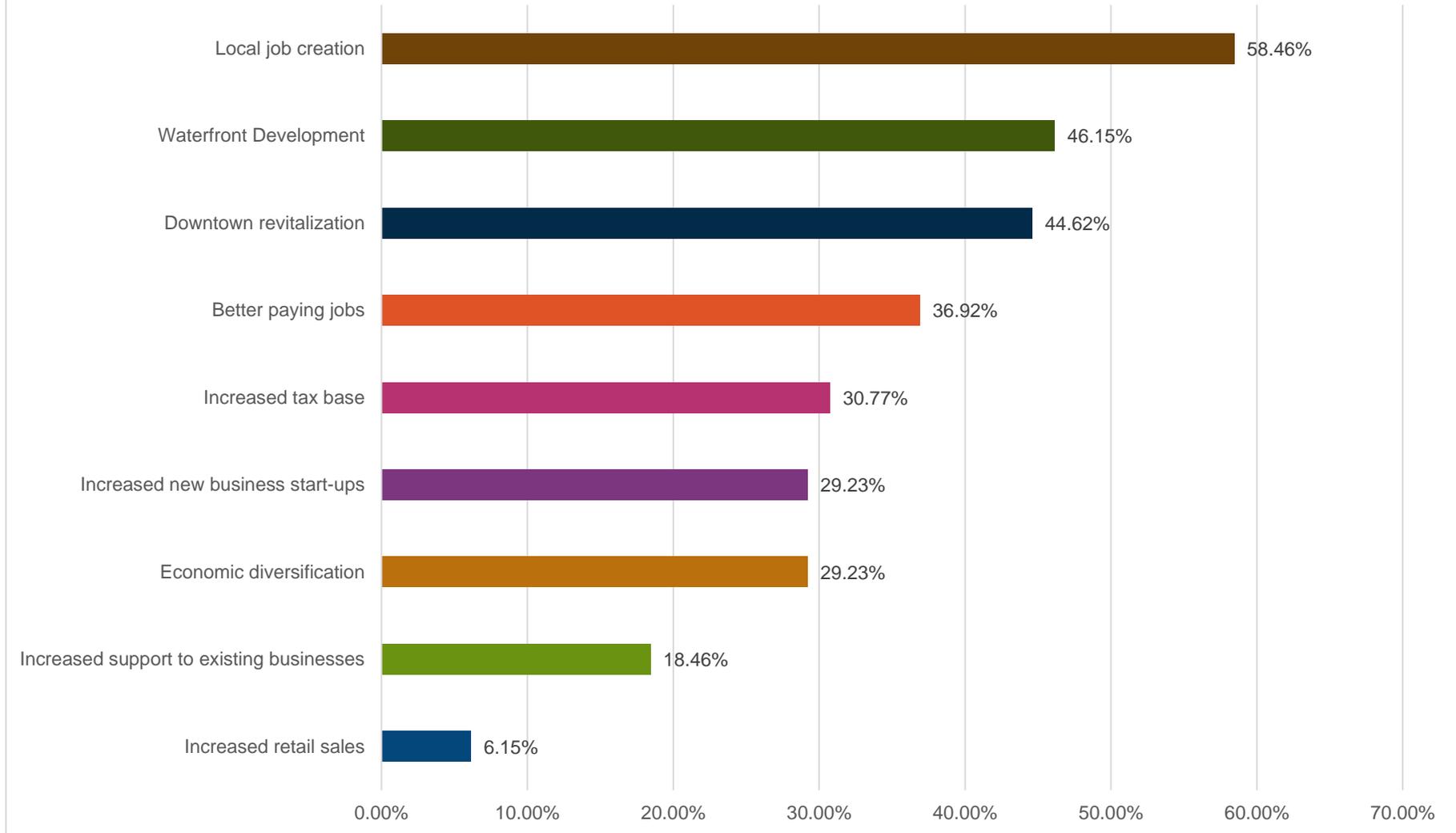
Rate the following as an asset supporting economic development or a weakness hindering economic growth or neither.



Rank order the following economic development strategies in order of importance.



What should be the top three goals of Elizabeth City/Pasquotank County's economic development strategic plan?



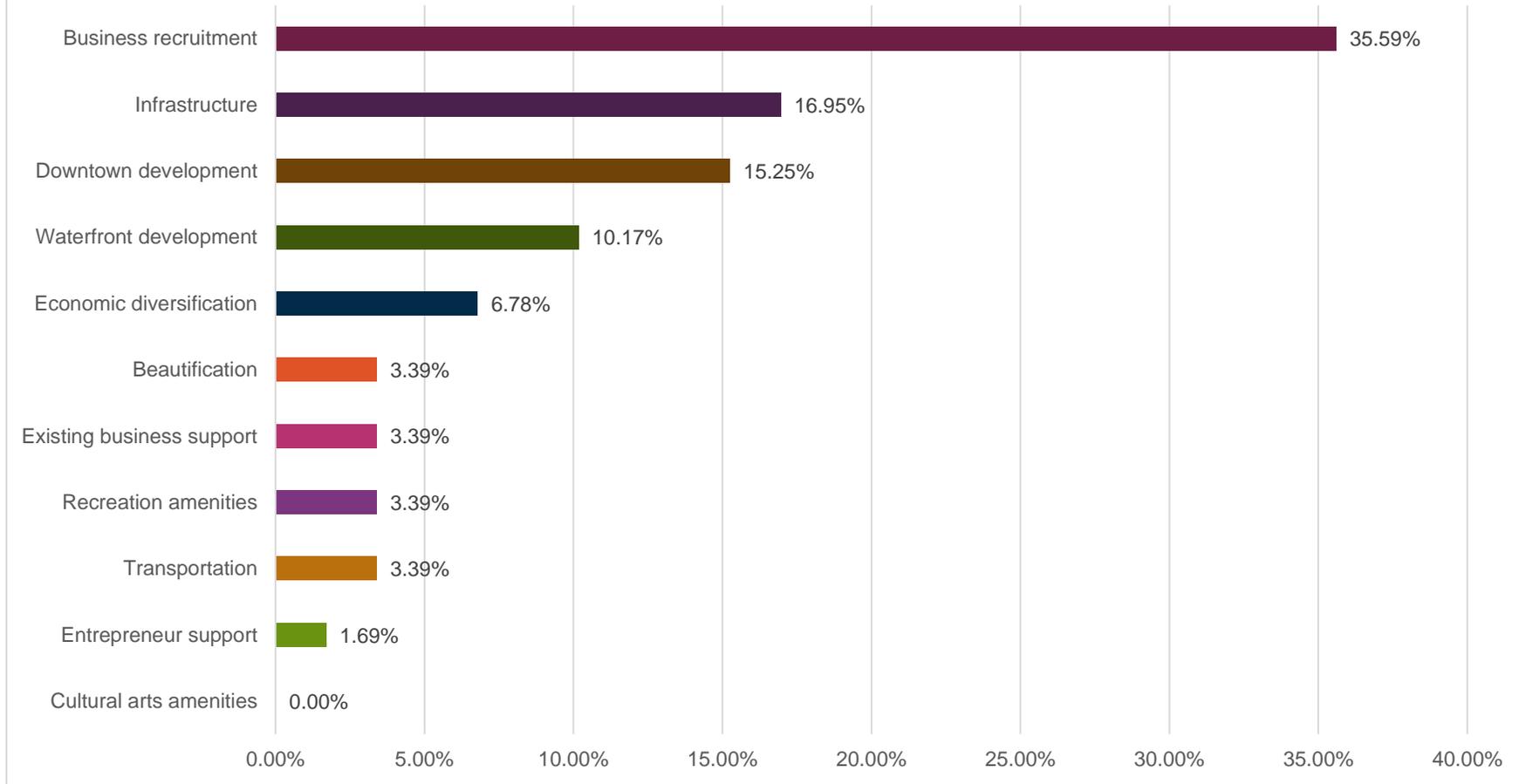
What is a model city for Elizabeth City - a place Elizabeth City would want to emulate? *(duplicate answers consolidated)*

- ⊙ Asheville, NC
- ⊙ Boone, NC
- ⊙ Boulder, CO
- ⊙ Sedona, AZ
- ⊙ Cary, NC
- ⊙ Charleston, SC
- ⊙ Durham
- ⊙ Edenton NC
- ⊙ Elizabeth City in past, when it was the place everyone wanted to be
- ⊙ Greenville, SC
- ⊙ Hendersonville, NC
- ⊙ Leesburg, FL.
- ⊙ Moyock
- ⊙ Mt Pleasant SC
- ⊙ New Bern
- ⊙ Summerville SC
- ⊙ Cape May NJ
- ⊙ Hickory NC
- ⊙ Outer banks that thrives on tourism
- ⊙ Portland, ME
- ⊙ Reidsville, NC
- ⊙ Rocky Mount, N.C.
- ⊙ Savannah Georgia's Riverfront district
- ⊙ Some aspects of the Research Triangle might be helpful, but also some of the waterfront towns like Newberg, Edenton, Washington might give good ideas.
- ⊙ Southern Pines NC
- ⊙ St. Augustine FL
- ⊙ Staunton VA
- ⊙ Traverse City MI
- ⊙ Washington NC waterfront
- ⊙ Wilmington, NC

What is one thing that Elizabeth City does better than other towns? *(duplicate answers consolidated)*

- ⊙ Hospitality
- ⊙ Gives seed grants to help businesses establish a downtown business
- ⊙ Parks and Recreation sites are nice!
- ⊙ People who live and work here are truly passionate about our community
- ⊙ Strong arts and friendly atmosphere
- ⊙ Arts and theater
- ⊙ Opportunities to provide feedback
- ⊙ Offer amenities to Intercostal Waterway boaters
- ⊙ Festivals
- ⊙ Small events to draw residents/tourists: MOA, AoA; annual Ghost Walk; family-friendly events
- ⊙ Character and history
- ⊙ Allows great work/life balance
- ⊙ Ordered
- ⊙ Extend the downhome feeling, welcoming people
- ⊙ Promoting local events
- ⊙ Still Southern with friendly and accepting residents
- ⊙ Small town feel
- ⊙ Maintain status quo
- ⊙ Pro-US Coast Guard!
- ⊙ Community events at the waterfront.
- ⊙ Enjoy what we have
- ⊙ less expensive housing
- ⊙ Community outreach
- ⊙ Listen to citizens
- ⊙ Provide opportunities for arts
- ⊙ Works to save its historical downtown
- ⊙ Only the sunsets, which isn't under our control
- ⊙ Murder, drugs
- ⊙ Communication by local govt. departments.
- ⊙ Local opportunity to higher education
- ⊙ Welcoming

What is the most important investment Elizabeth City/Pasquotank County could make to ensure long-term, sustainable economic growth?



What is an outcome you would like to see from the strategic plan?

- ⦿ New businesses wanting to open and be located in our area.
- ⦿ We need to snap up the opportunity to take advantage of the old shipyard facility by revamping the site into a Boat Dry Storage Facility. This type of business needs only one major thing; access to the water. Elizabeth City does not showcase its crown jewel, the Pasquotank River, as it should. There are so many people who would sign-up years in advance just to reserve their storage spot. The facility will easily pay for itself and requires minimal investment of a boat forklift and a few attendants. With the military presence and common love for boating, many residents are discouraged by the perceived hassle of storing a boat at home or paying to have it sit on a trailer at a U-store lot. When you really think of this idea it's hard to find reasons not to pursue this opportunity. Boating is what makes Elizabeth City great!
- ⦿ The initiation, expansion, or relocation of businesses to Elizabeth City/Pasquotank County without the benefit of tax incentives, if possible.
- ⦿ One plan supported by all community leaders and efforts.
- ⦿ More good-paying, sustaining businesses.
- ⦿ increased collaboration
- ⦿ Improved prosperity for Elizabeth City and greater retail options
- ⦿ Growth in our tax base from new businesses and new homeowners
- ⦿ Managed steady growth with job opportunities for our youth
- ⦿ Attention to the structures we have, the industrial park and buildings available already instead of concentrating on building new ones. It may cost money to bring them up to standards, but in the long run it will pay for itself.
- ⦿ Industrial development (Tanglewood) creating jobs will do it all! (Better schools, less poverty...)
- ⦿ The "want" to come to Elizabeth City.
- ⦿ Diverse faces involved in profit-making enterprises, while being a part of making strides to enhance Elizabeth City, its offerings, and its value to NC and its people, in the eyes of those that visit! A balanced approach to (re-)development in DOWNTOWN and Tanglewood!
- ⦿ Serious consideration of the development of downtown
- ⦿ Support for local business development
- ⦿ All of the items mentioned before, better schools, good companies with high paying jobs, and more health care
- ⦿ Growth of downtown and waterfront development for the lifestyle enhancement of residents and visitors; Ehringhaus is a main corridor, and economic incentives for attracting new or hip (family friendly) businesses are needed. Too many mistakes have been made we need to reverse. ***Not another vape shop** / clean up Road Street corner...
- ⦿ I would like to see Elizabeth City's streets to be bustling with folks of all ages. Jobs for young people so they can spend money and live downtown or a close neighborhood.

- ⊙ Growth in number of well-paying jobs within the area.
- ⊙ Ordered economic growth designed for our specific needs through a plan implemented by all partners and worked for in harmony and unison
- ⊙ Downtown revitalized, more nightlife, better schools, and a welcoming environment to people from every walk of life. Much-needed street repairs and litter control.
- ⊙ I would like to see our waterfront come to life and revitalization of the connecting downtown.
- ⊙ That our downtown is a destination vacation. With beautiful sidewalks, busy storefronts and businesses with people all along the streets walking to explore what Elizabeth City has to offer.
- ⊙ Have the state nudge a major employer in the manufacturing field to build in EC.
- ⊙ Bigger tax base, more residents choosing to stay in Pasquotank
- ⊙ A real difference, not just having a plan that does nothing.
- ⊙ Steakhouse. And, reduction in dilapidated buildings, especially old S&R market properties.
- ⊙ A color-blind, crime-free, family oriented, joyful community
- ⊙ Progress!!
- ⊙ Big name retail stores, good and diverse restaurants. We are tired of second-hand shops and Mexican restaurants everywhere. Expand our choices here versus going to Virginia.
- ⊙ Clear direction on goals and objectives
- ⊙ A business recruitment plan
- ⊙ Some action!
- ⊙ I would like to see the strategic plan address changes needed in policies and procedures.
- ⊙ New businesses with higher paying jobs
- ⊙ The waterfront is not up, it should be in tiptop shape at all times
- ⊙ Better paying jobs, cleaning up some neighborhoods to ensure more pride in EC altogether
- ⊙ A plan that takes into account all people and provides opportunities.
- ⊙ Positive growth environment with a plan for the future.
- ⊙ I would like see more industry in area that provide jobs. I would like see the IDC with more industry people on board and less political people.
- ⊙ Higher-paying jobs that lead to residential revitalization and top-notch public education.
- ⊙ Outdoor beauty, smarter people
- ⊙ Maybe more choice in internet providers or a general desire to be open to whatever industry is considering the area? Solar, Wind, Aircraft maintenance, etc.?
- ⊙ A long-range economic benefit to the area, not just a quick influx of cash during construction and then gone
- ⊙ Sometimes it's the people that need to be changed and not the plan.

- ⊙ Inclusive goals that allow for homegrown opportunities to build the community from within, resulting in greater economic equality.
- ⊙ Focus
- ⊙ Larger employers
- ⊙ Job creation

Please make any additional comments here.

- ⊙ Our county/region certainly has the workforce to support a variety of industries. ECSU and the COA graduates students in many cases, have to leave the area in order to pursue a professional career. Also, I know a lot of people, including myself, that travel to Virginia on the weekends to get goods and services that can't be found in Elizabeth City. It's very unfortunate that our dollars are being spent out of state.
- ⊙ Organize area investors to pool their money on key, local investments.
- ⊙ Develop programs for visitors to easily rent area homes.
- ⊙ Develop incentives for national artists to display in EC shows (prize money? free places to stay?).
- ⊙ Encourage waterfront hotels.
- ⊙ Try to have a downtown event every weekend (music, art/crafts, food, competitions, other).
- ⊙ Visit other cities that managed to grow their economies.
- ⊙ Work with realtors to advertise EC in other areas - especially in the north.
- ⊙ Better support for "new businesses"
- ⊙ The growth we're seeing is very encouraging. We, like so many others, go to Virginia every weekend to enjoy a wider selection of dining and shopping, but would love to stay local if we had better options.
- ⊙ We have a wonderful area to work with, but we need to pay attention to what is here already, and work on that. Why do we have so many vacant buildings in disrepair, sidewalks that look awful, streets that continually flood? Governmental buildings are not excluded: parking lots with litter, school buildings that need painting or power washing, etc. Those things need to be addressed before outsiders will want to come here: it would show that we care about our community.
- ⊙ So very grateful for Christian Lockamy-his plan gives hope for growth here
- ⊙ If the attitudes and people's outlooks on the region change, then there could be a boom in the near future for more people and businesses to come here.
- ⊙ Indoor Adult and Kid Friendly GoKart Track (Downtown)
- ⊙ 1-hour Pontoon River Boat Tours: to make one of our biggest resources live again, and accessible to those of us that live here and visitors!
- ⊙ Elevated Viewing Opportunities to SEE the Water (Eating, Virtual Geo Touring, Evening Enjoyment)

- ⊙ Need to clean up marginalized neighborhoods close to downtown. Make people proud of where they live and work.
- ⊙ Thank you for wanting to make it better. Getting people to accept change is a challenge in this town. They need to look past 2019 and into the future
- ⊙ Encourage new breweries, waterfront activities, and events for getting people downtown or on the water for the "outside vibe"
- ⊙ Need to market better in NC cities...very few people, especially new in-migration, know of Elizabeth City or what it has. Tanglewood would be great for a minor league baseball team like single A. Would love to see the Shipyard be mixed use and maintain some of its character/old buildings. Would make a cool small concert venue people could walk downtown to. Crack down on slumlords and their out of date housing...work on affordable housing to relocate people...fix or tear down shacks...encourage alternative styles housing to fill vacant lots like tiny homes to attract young people. Market Elizabeth City as a great place to work from home
- ⊙ I applaud the efforts that have been made thus far towards revitalization of our downtown area. We are coming along nicely.
- ⊙ If you cannot get more federal funding to grow the area (increased size of the Coast Guard base), then bring in the tourist dollars. This means waterfront development and downtown revitalization.
- ⊙ Thanks and good luck!
- ⊙ In order to do #13, we need to clean up this city; deter criminals from living here, make it worth our college students to stay and live here after graduation. We do not have anything here to make them want to stay - except for the dropouts. They stay and make a living in the drug community. Until we clean that up, no one will stay.
- ⊙ We have done this before - please make something happen this time.
- ⊙ The main derogatory comment heard over and over again about Elizabeth City is the electric rates. People avoid moving into the city due to this.
- ⊙ (ART) Museum of Albemarle, add Art to name and recruit artist expeditions. We need a great internet site with local inner communication networking with municipal and political leadership. Lack of communication serves no one.
- ⊙ We need to promote the industrial parks and vacant land. Get involved with state department of commerce and small business group in state.
- ⊙ I view downtown revitalization and waterfront revitalization as crucial to grow the community. This will attract more people to spend in our community, naturally create entrepreneurship, and grow a tourism industry that is vital to the city's economic future.
- ⊙ Without top notch public education, larger corporations will be reluctant to come to Elizabeth City.
- ⊙ Elizabeth City needs education and pride in the town. It's like no one cares to make it look good.

- ⦿ I am not sure more dollars or technology would necessarily improve the economic community. It has got to start with perhaps better decision making on the part of the individual to want to improve the way of life for them personally and the community.
- ⦿ Please note that land is NOT a renewable resource, so we need to make sure that the long-term benefit of a project is taken into consideration
- ⦿ Admit the problems, address the problems, and fix the problems.
- ⦿ The plan has to be cohesive and take into consideration what other organizations are doing that support economic development goals.

Appendix C: Target Industry Analysis Research

Aerospace, Aviation, and Defense

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location Quotient	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five-year change in Establishments	Five-year change in Employment
33641	Aerospace Product and Parts Manufacturing	0.07	8	179	9	187	(1)	(8)
33661	Ship and Boat Building	38.27	50	27,241	45	27,732	5	(491)
48819	Support Activities for Air Transportation	1.53	26	918	25	1,060	1	(142)
48839	Support Activities for Water Transportation	20.66	21	825	27	887	(6)	(62)
54133	Engineering Services	1.93	440	9,712	436	8,918	4	794
81131	Industrial Machinery Repair and Maintenance	0.85	126	911	141	1,266	(15)	(355)

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Warehouse and Distribution

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location Quotient	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five year change in Establishments	Five year change in Employment
48851	Freight Transportation Arrangement	1.92	83	2,235	83	1,597	-	638
48899	Other Support Activities for Transportation	0.55	12	95	NA	NA	NA	NA
49311	General Warehousing and Storage	0.88	62	4,626	66	2,889	(4)	1,737
49312	Refrigerated Warehousing and Storage	0.91	14	299	15	257	(1)	42
45411	Electronic Shopping and Mail-Order Houses	0.76	82	1,562	68	1,093	14	469

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Food and Beverage Manufacturing

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location Quotient	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five-year change in Establishments	Five-year change in Employment
31171	Seafood Product Preparation and Packaging	3.83	9	681	11	725	(2)	(44)
31191	Snack Food Manufacturing	1.39	7	461	8	453	(1)	8
31192	Coffee and Tea Manufacturing	8.68	7	1,087	NA	NA	NA	NA

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Precision Manufacturing

Employment Data, Virginia Beach-Norfolk MSA

NAICS Code	Description	Annual Average Employment Location	2018 Annual Establishments	2018 Annual Average Employment	2014 Annual Establishments	2014 Annual Average Employment	Five year change in Establishments	Five year change in Employment
33231	Plate Work and Fabricated Structural Products	0.46	18	402	16	252	2	150
33232	Ornamental and Architectural Metal Products	0.48	30	546	30	525	-	21
33281	Coating, Engraving, and Heat Treating Metals	0.63	16	454	13	344	3	110
33324	Industrial Machinery Manufacturing	0.54	11	333	11	387	-	(54)
33391	Pump and Compressor Manufacturing	3.51	7	887	6	882	1	5
33422	Broadcast and Wireless Equipment Manufacturing	0.06	3	14	3	21	-	(7)
33451	Measuring and Controlling Instruments Manufacturing	0.25	33	525	28	540	5	(15)
33531	Electrical Equipment Manufacturing	0.53	11	381	11	111	-	270
33593	Wiring Device Manufacturing	1.05	5	239	5	228	-	11
81121	Electronic Equipment Repair and Maintenance	1.38	86	730	80	671	6	59

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics



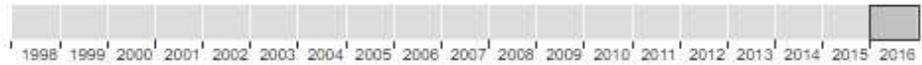
Cluster Specialization

- Strong clusters above 90th percentile specialization
- Strong clusters above 75th percentile specialization
- Other specialized clusters (LQ > 1.0)

— BCR >= 95th pctile & RI >= 20%

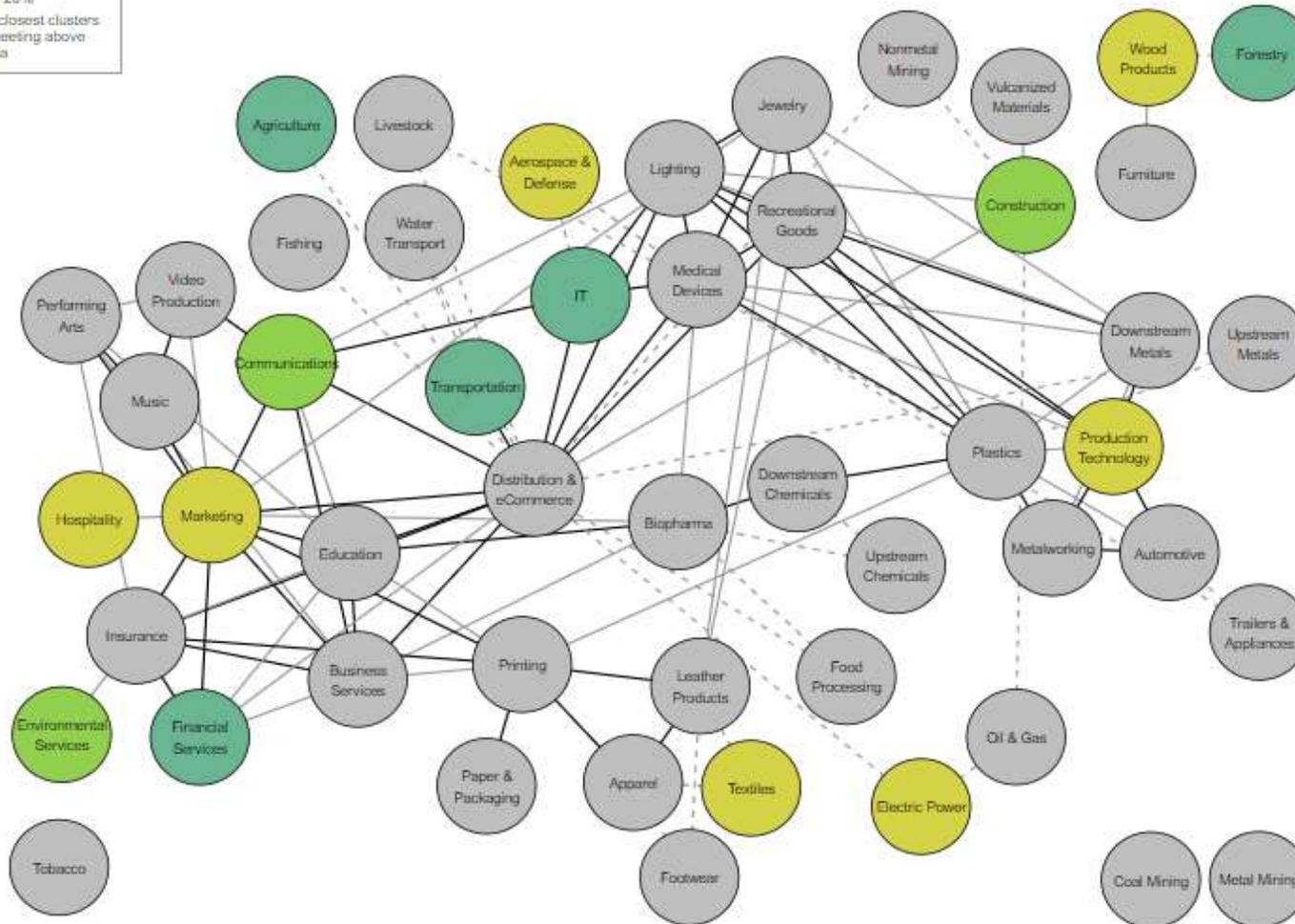
— BCR 90th-94th pctile & RI >= 20%

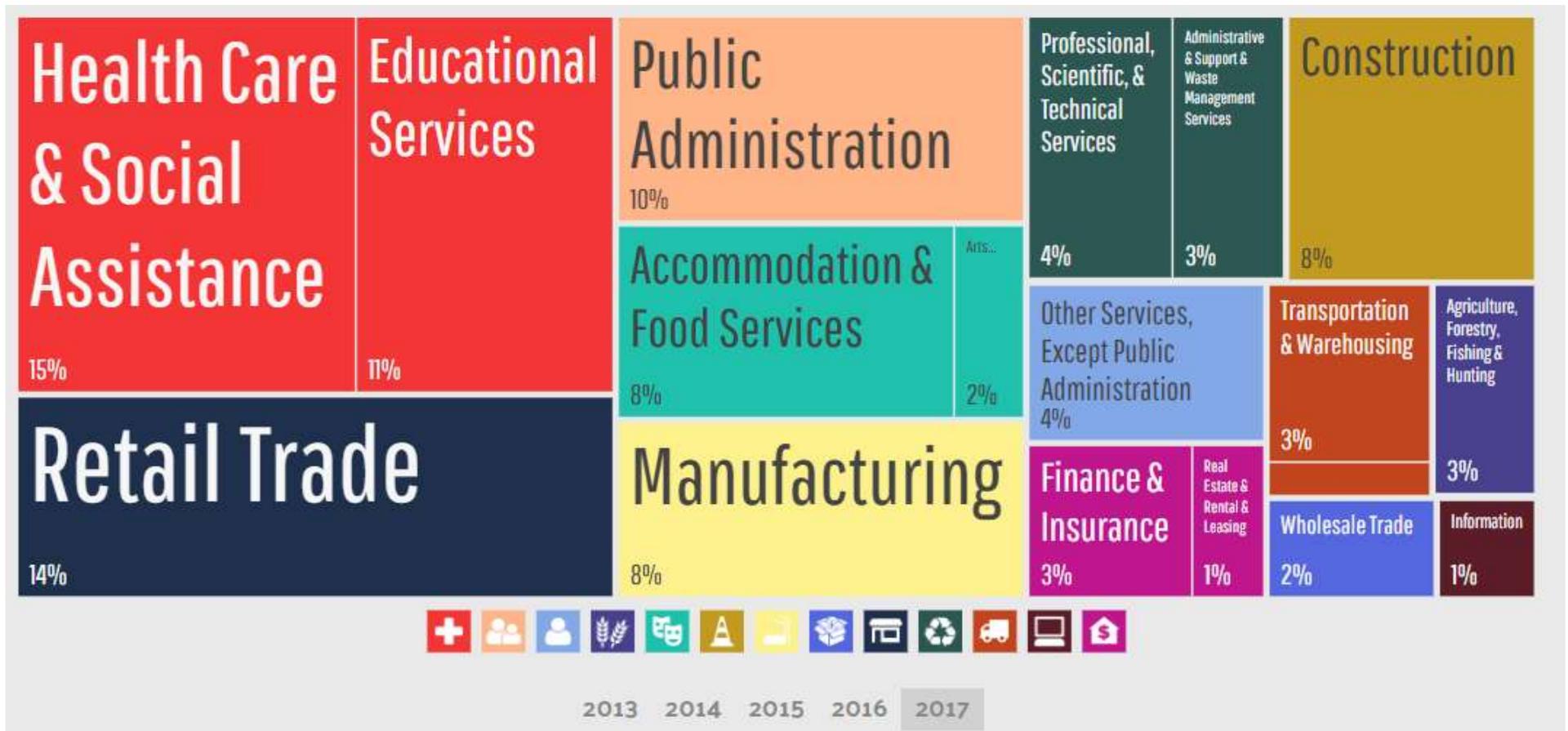
— Next closest clusters not meeting above criteria



Cluster Linkages and Economic Diversification

Elizabeth City, NC Micropolitan Area, 2016





Appendix D: Study Sponsor and Consultant



ElectriCities of N.C. Inc. supported the City of Elizabeth City Economic Development Strategic Plan. ElectriCities offers a variety of services to promote NC Public Power communities to businesses and economic developers. They help communities recruit business and industry by providing:

- ⊙ Target Marketing
- ⊙ Marketing/Collateral Assistance
- ⊙ Aerial Photography
- ⊙ Proposals for Prospects/Clients
- ⊙ Advertising Opportunities
- ⊙ Target Sectors
- ⊙ Trade Show Opportunities
- ⊙ Direct Marketing
- ⊙ Retail/Commercial Developments

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