



Economic Development Strategic Plan
for
Martin County

Williamston, Robersonville, Hamilton

Funded by



Martin County Committee of 100

Developed by



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Table of Contents

Executive Summary	2
SWOT Analysis	6
Summary of Economic & Demographic Trends	11
Retail Leakage Summary	12
Economic Development Strategies	13
Implementation	48
Measuring Success	49
Appendices	
A: Economic and Demographic Profile	50
B: Retail Leakage	60
Exhibits	
A: Williamston – Potential Commercial Development Sites	76
B: Williamston – Potential Industrial Development Sites	77
C: Robersonville – Potential Commercial Development Sites	78
D: Robersonville – Potential Industrial Development Sites	79
E: Hamilton – Potential Commercial Development Sites	80
F: Hamilton – Potential Industrial Development Sites	81
Methodology	82
Sanford Holshouser Economic Development Consulting	83

Executive Summary

The mission of the Economic Development Strategic Economic Development Plan for Martin County including Williamston, Robersonville, and Hamilton is to “outline a path to enhance Martin County’s position as a regional hub for business and tourism.” This mission supports the overall vision of Martin County as a “Regional Hub for Business and Tourism.” Led by the Town of Williamston, this strategic plan is a guide for Martin County’s economic future – it sets a course.



Sanford Holshouser Economic Development Consulting (Sanford Holshouser) was engaged by the Town of Williamston, through a Golden LEAF grant, to create an economic development strategic plan that was broader than the town limits. Understanding that economic development is a team sport, Williamston engaged Martin County EDC, Martin Community College, and the Towns of Robersonville and Hamilton. Strategy development for Robersonville and Hamilton were supported through grants from ElectriCities of N.C., Inc. Each organization is commended for its role in providing input to develop this economic development strategy.

This study includes a SWOT (strengths, weaknesses, opportunities, and threats) Analysis, an economic and demographic profile, a retail leakage review, and recommendations for the economic development program. The SWOT information was gathered from local leaders through interviews, community meetings, online survey, and from economic development allies outside the County. More than 100 Martin County citizens and external allies participated.

The SWOT reveals that the area’s greatest assets are location, Senator Bob Martin Eastern Agricultural Center, transportation network, and Martin Community College. Challenges cited include declining population, low education attainment, insufficient workforce skills, lack of amenities, and underdeveloped tourism assets. Martin County has created many opportunities in economic development. Local leaders would like to capitalize on the Roanoke River, tourism, downtown redevelopment, and business parks. Several of the threats identified are common to most rural counties, such as aging population, loss of young professionals, and maintaining natural resources.

The consulting team collaborated on recommendations to enhance the economic development efforts of the towns and County. The recommendations are founded on input from local leaders, quantitative and qualitative research, best practices in economic development, and the consulting team’s experience in economic development. Sanford Holshouser suggests an in-depth review of the recommendations section to fully understand the scope and context of the bulleted listing.

Martin County Strategic Plan Recommendations Summary

Product Development

- Areas identified in each town for commercial and industrial development
- Development recommendations
- Multi-jurisdictional park
- Business recruitment

Martin County Target Industry Sectors

- Wood and forestry products
- Food
- Advanced manufacturing
- Green energy
- Value added agriculture
- Heritage tourism

Marketing

- Branding Hamilton and Robersonville and Williamston reviewing its brand
- Community profiles
- Website updates
- Internal marketing & communications

Business Retention and Expansion

- Martin EDC BRE Program
- Municipal support of existing business
- Communication with existing business

Commercial & Retail Development

- Real estate information
- Marketing briefs on sites and buildings
- Market data

Small Business Development – Williamston Opportunities

- Work with MCC Small Business Center on these opportunities:
 - Expand Motor Vehicle & Parts Dealers
 - Expand Furniture & Home Furnishings Store
 - Expand Electronics & Appliance Store
 - Expand Clothing Store
 - Expand General Merchandise Store

Small Business Development – Robersonville Opportunities

- Promote new development at the intersection of US 64/NC 903 to developers of fast-food, convenience store, small commercial center
- Work with ElectriCities Retail Recruitment Program and MCC Small Business Center on these opportunities:
 - Furniture & Home Furnishings
 - Limited-Service Eating Places
 - Expand Building Materials, Garden Equipment & Supply Stores

Small Business Development – Hamilton Opportunities

- Work with ElectriCities Retail Recruitment Program and MCC Small Business Center on these opportunities:
 - Grocery or General Stores
 - Food Services & Drinking Places
 - Expand Building Materials, Garden Equipment & Supply Stores
- Businesses supporting river recreation

Services to Regional Market

- Automotive dealers, parts, accessories, and tire stores
- Electronics and appliance stores
- Lawn and garden equipment and suppliers stores
- Health care services provided from regional centers

Tourism

- One-room school in Williamston
- East Carolina Motor Speedway
- Historic district designation
- Roanoke River
- Deadwood
- Bear Grass
- Bob Martin Center
- Amenity development

Workforce Development

- MCC training programs
- Agriculture-focused high school programs
- Community college scholarship program
- WorkKeys

Equine Industry Development

- New programs at MCC
- Expansion of BMC
- Hotel and retail recruitment
- Expanding amenities
- Coordinated marketing
- Student housing

Incentives

- Current policy is effective
- Municipal small business and downtown incentives

Downtown

- Downtown building inventory
- Incentives for redevelopment

Gateways

- Hamilton @ Hwy 125
- Robersonville @ US 64
- Williamston US 64 @ exit 514
- Appearance Advisory Committee

Leadership Development

- Government academy
- Leadership program
- Youth leadership development

Residential Development

- Market to residential developers
- Residential incentive examples

Sanford Holshouser recommends that the strategic plan be endorsed and fully supported by all town boards, County Board of Commissioners, and ally groups such as the EDC, TDA, Martin Community College, and Chamber of Commerce. Implementation should be led by an expanded Steering Committee. We recommend regular quarterly meetings. For the first year of implementation, Sanford Holshouser recommends the Town of Williamston lead the implementation process since the Town has been the driving force behind the strategic planning project. After the first year, a leadership structure should be developed.

The Steering Committee identified the following as top priorities for implementation:

Product Development

- Gather information on available sites (short term)
- Explore multi-jurisdictional park (long term)

Retail/Small Bus. Development

- Develop Community College program on retail business opportunities (short term)

Marketing

- Branding (mid-term)
- Website updates (short term)

Downtown

- Develop building inventory (short term)
- Create incentive program (mid-term)

Tourism

- Create destinations (long term)

Gateway improvement

- Identification of grants (long term)

Collaboration and partnerships will be the driving force behind Martin County's progress in economic development. Implementation of this economic development strategic action plan will require new and innovative collaborations. Given the resources devoted to the development of this plan, we trust that Martin County leaders will answer this call to action. One Steering Committee member reminded us that a take-away is important at every meeting – what is the take-away from this strategic plan? We believe that it is to get busy. The economic development strategic action plan needs dedicated, hard-working community leaders to make it a reality.

SWOT Analysis

Martin County, Williamston, Robersonville, and Hamilton all have important assets that support economic growth. Sanford Holshouser gathered information on strengths, weaknesses, opportunities and threats from interviewing, meeting with, and surveying citizens. The responses indicate what citizens believe is important about their community as well as challenges that must be overcome to realize economic growth. In all, approximately 100 people had input into the planning process.

Strengths

Many people engaged in this study spoke of the quality of life in Martin County, reasonable cost of living, and the ability to access larger markets via the excellent transportation network. In this section, we list strengths that were commonly discussed across the many points of contact with local leaders.

- Road network including I-95, US 17, and US 64
- Strategic location to ports, beaches, mountains, military bases, east coast marketplace
- Roanoke River
- Historical sites including Fort Branch
- Climate
- Martin County Arts Council
- Outsiders are readily welcomed
- Low cost of living and low cost of doing business
- Available land
- Julius Rosenwald Schools
- Senator Bob Martin Eastern Agricultural Center
- Williamston is a sub-regional commercial hub
- Martin County Airport
- Martin General Hospital
- Parks and recreation facilities
- Audubon International Sustainable Community Certification
- Martin Community College, specialized equestrian program
- Natural gas infrastructure
- Rail transportation
- Raw materials
- Strong work ethic
- Diverse economic base
- Strong agriculture base
- Martin County schools



- East Carolina University
- Pitt-Martin Industrial Park as well as Roberson Business Park in Williamston
- Aggressive economic development organization
- Northeast Technology and Business Center
- Restaurants
- Financial institutions
- Low crime rate
- Deadwood western theme park

Weaknesses

It is critical to identify weaknesses in long range planning. By acknowledging weaknesses and putting strategies in place, they can be overcome. Weaknesses are the hurdles communities face when recruiting new business, developing amenities, and retaining and growing the population base. In strategic planning, building on assets is half of the equation - the other half is overcoming challenges. In all meetings, Martin County leaders discussed the need for a cohesive vision, more collaboration, perseverance, and strong local leadership. Other weaknesses identified were:

- Declining and aging population
- Cycle of poverty perpetuating economic hardships, high mortality rates, chronic illness, and drop outs
- Lack of influential state-level leadership; redistricting may yield even less influence
- Low skilled workforce, work ethic in specific industry sectors
- Brain drain
- Public schools, low educational attainment, low test scores,
- Retail amenities, entertainment, and social venues
- Perception of rural, eastern North Carolina
- Access to capital
- Broadband coverage
- Out-commuters
- Retail leakage
- Tax rate is high but total tax burden is low
- Distance from urban areas
- Truck transportation
- Business support services
- Downtown revitalization
- Youth engagement and youth training
- Lack of local support for local businesses

- Packaged tourism itineraries
- Lack of jobs and amenities to attract a young, professional workforce
- Entrepreneurship
- Lack of Roanoke River development

Opportunities

Economic development is about being equipped to answer the knock of opportunity at the door. In fact, economic developers are often described as a community's eternal optimist. Martin County and the municipalities are bursting with opportunities in economic development. The most often discussed opportunities by local leadership were:

- Senator Bob Martin Eastern Agricultural Center
- Tourism: riverfront, heritage, agri-tourism, arts, eco-tourism, hunting, fishing, travel destinations, sporting events, Bear Grass, Rosenwald Schools as a destination
- Underutilized, vacant buildings and land
- Pilot extraction facility and specialty crops to spur a new cluster (peanuts and alternative fuels)
- New broadband fiber technology
- Martin Community College, career education, vocational training
- Proposed Ag High School/Middle College
- Youth engagement, pre-school age to teenagers
- Expand the retail sub-regional hub
- Wellness center such as a YMCA
- Advanced training for industry standards of quality
- Providing strategic products/services to Tidewater, Greenville, Outerbanks areas
- Attracting complementary businesses such as wood products and energy
- Four-laning US 17 South
- Rail service and service potential to Roberson Business Park
- Job creation through the Roanoke River
- More diverse housing stock
- East Carolina University
- Green industry development
- Equine business development, trail development, equestrian program housing
- Specialized health care



- Capture beach traffic
- Downtown festivals and events
- Creating a museum such as one focused on agricultural equipment

Threats

Looming on the horizon, economic threats may never come to pass, but preparations should be made in case they do. Communities that prepare by diversifying their tax base and investing in education and infrastructure will rebound from economic threats faster than communities who pretend the threat is not real. As we move forward with strategic planning, threats play a critical role in the development of implementable strategies.

- Hurricanes
- Water quality in the County with increased development, interbasin transfer, integrity of the Roanoke River
- Aging population
- Drop-out rate
- Impact of increasing gas prices on out-commuters and tourism
- State/federal budget cuts
- Redistricting and losing influence at the state and federal level
- Company closings and major job losses
- Lack of sewer infrastructure in the County
- Global education competitiveness
- Out-migration to Greenville
- Brain drain

SWOT Summary – Williamston

Williamston's key strength is that the Town is the commercial and retail hub for Martin County. It attracts people for shopping, health care, and education. The Town also has taken advantage of the Roanoke River and the economic benefits it can bring along with designations such as the Audubon Sustainable Community Certification. Citizens rated parks and recreation programs and downtown development the highest of all economic development support programs. Challenges facing the Town include revitalizing downtown, attracting businesses with higher paying wages, and creating tourism destinations. Key opportunities for the Town are centered on its greatest assets: Martin Community College and the Bob Martin Center. These two entities are economic drivers for Williamston both in terms of tourism, small business, and economic development in general.

SWOT Summary – Robersonville

The Town of Robersonville enjoys low property taxes, strong civic organizations, excess water and sewer capacity, and a local speedway. At the same time, the Town struggles with high electric rates, downtown revitalization, aging infrastructure, and stagnate growth. Opportunities to build upon include: residential development, commercial development, downtown redevelopment, and recreation. When asked about their vision for Robersonville’s future, town leaders talk about full shops on Main Street, improved aesthetics, a thriving job market, and improvements in amenities that will support a higher quality of life.

SWOT Summary - Hamilton

Leaders in the Town of Hamilton list as its strengths small business base, historic sites like Fort Branch and the Rosenwald School, and the water/sewer system. Challenges recognized by the Town include the lack of some small business services, declining population, and community appearance. Opportunities for future development that were a focus in the strategic planning process will include historic tourism, recreation tourism, and the development of local service businesses. When asked about their vision for Hamilton’s future, town leaders talk about a variety of shopping, recreation opportunities, population growth, and a more vibrant community.

Summary of Economic and Demographic Trends

The economic and demographic profile is Sanford Holshouser's quantitative view of how Martin County and the towns are growing. We benchmark the data with the region (Greenville Metropolitan Statistical Area) and the State. Sanford Holshouser uses the economic and demographic profile to identify strengths and weaknesses that are addressed in the economic development strategic plan. In this section, we list highlights of the data. The complete data and research can be found in Appendix A.

- Like most rural communities in North Carolina, Martin County's population declined by from 2000 to 2010 and is projected to continue to decline over the next five years. Municipal population growth was mixed with the majority of towns losing population. Williamston's population declined 7.3%, Robersonville by 14%, and Hamilton by 20.9%.
- Martin County's age demographics are older than North Carolina's with a greater percentage of people above age 55. Approximately 58% of the population is in working age groups (age 20 – 64).
- Martin County is becoming slightly more racially and ethnically diverse, specifically pointing to a growing Hispanic population.
- Educational attainment has made significant gains. Today about 88.4% of the County population has a high school education or greater, compared to only 80.7% in 2000. Conversely, SAT scores have dropped since 2008. SAT scores are currently 92% of the state average and 91% of the national average.
- The labor force has been declining (currently 11,188) and unemployment has stabilized after increasing through the recession.
- The largest employment sector is Health Care and Social Assistance, employing 20% of the workforce. When reviewing all employment sectors, public and private, the public sector is the largest and employs 27%. The county average weekly wage is \$518. Wages have grown since 2008.
- Per capita and median household income has been increasing but remains below regional and state averages. The income gap between Martin County and the region and state is widening. The percentage of people living below the national poverty level rose from 1999 to 2009.
- Home values are growing with a median home value of \$88,441.
- The County crime rate is, and has been, well below the state average.

- Retail sales have been growing and currently standing at \$164 million a year in Martin County and \$109 million a year in Williamston. (Data is not available for Robersonville and Hamilton from the NC Dept. of Revenue.)

Retail Leakage Summary

The complete data and research for the Retail Leakage Study can be found in Appendix B. The retail leakage data was gathered from a private data source, ESRI. Overall retail sales reported by NC Department of Revenue are based on taxable sales and ESRI reports estimated sales to consumers by establishment; hence, the figures are from different reporting sources and not directly comparable. Here we summarize the data for Martin County, Williamston, Hamilton, and Robersonville.

- Martin County's total retail demand is estimated at \$180 million, and retail supply is estimated at \$126 million, which leaves a retail gap (leakage) of \$54 million. The majority of leakage is in Food & Beverage Stores, Grocery Stores, and General Merchandise Stores. There are opportunities to attract businesses in these sectors as well as Furniture, Building Materials, Clothing, Food Services & Drinking Places, and Limited Service Eating Places.
- Williamston's total retail demand is estimated at \$40 million, and retail supply is estimated at \$85 million, which leaves a retail gap (over supply) of \$45 million. The majority of over supply is in Motor Vehicle Parts Dealers and Automobile Dealers. Even though Williamston has over supply in areas, meaning it is a regional commercial hub, there is room for business development in Department Stores and businesses that will encourage Martin County citizens to shop local.
- Hamilton's total retail demand is estimated at \$3.2 million, and retail supply is estimated at \$1.2 million, which leaves a retail gap (leakage) of \$2 million. The majority of leakage is in Motor Vehicle & Parts Dealers and Automobile Dealers. Hamilton's prime opportunities for retail development include Food & Beverage Stores, Grocery Stores, and General Merchandise Stores.
- Robersonville's total retail demand is estimated at \$11 million, and retail supply is estimated at \$5 million, which leaves a retail gap (leakage) of \$6 million. The majority of leakage is in Motor Vehicle & Parts Dealers, Automobile Dealers, and Gasoline Stations. Sanford Holshouser believes there to be a data error on Gasoline Stations as the convenience complex at US 64 is now within the town limits. Robersonville's key opportunity for retail development is General Merchandise Stores and Department Stores.

Economic Development Strategies

Economic development today requires a multifaceted approach. Gone are the days of a single focus on industrial recruitment, which is still very important. In today's climate, small business development, entrepreneurship, existing business support, and in some cases, tourism, all have important roles in successful economic development programs. Overall economic development strategies for Martin County are structured in those foundational building blocks. There are specific strategies for Williamston, Robersonville, and Hamilton that follow.



Product Development

Product development is a cornerstone of economic development. Business and industry must have a place to locate and expand. In urban areas, the private sector develops sites, parks, and buildings. In rural communities like Martin County, public-private partnerships are often needed to spur development, and in some cases the public sector takes on a lead role in this type of development.

Martin County EDC has several product development initiatives underway.

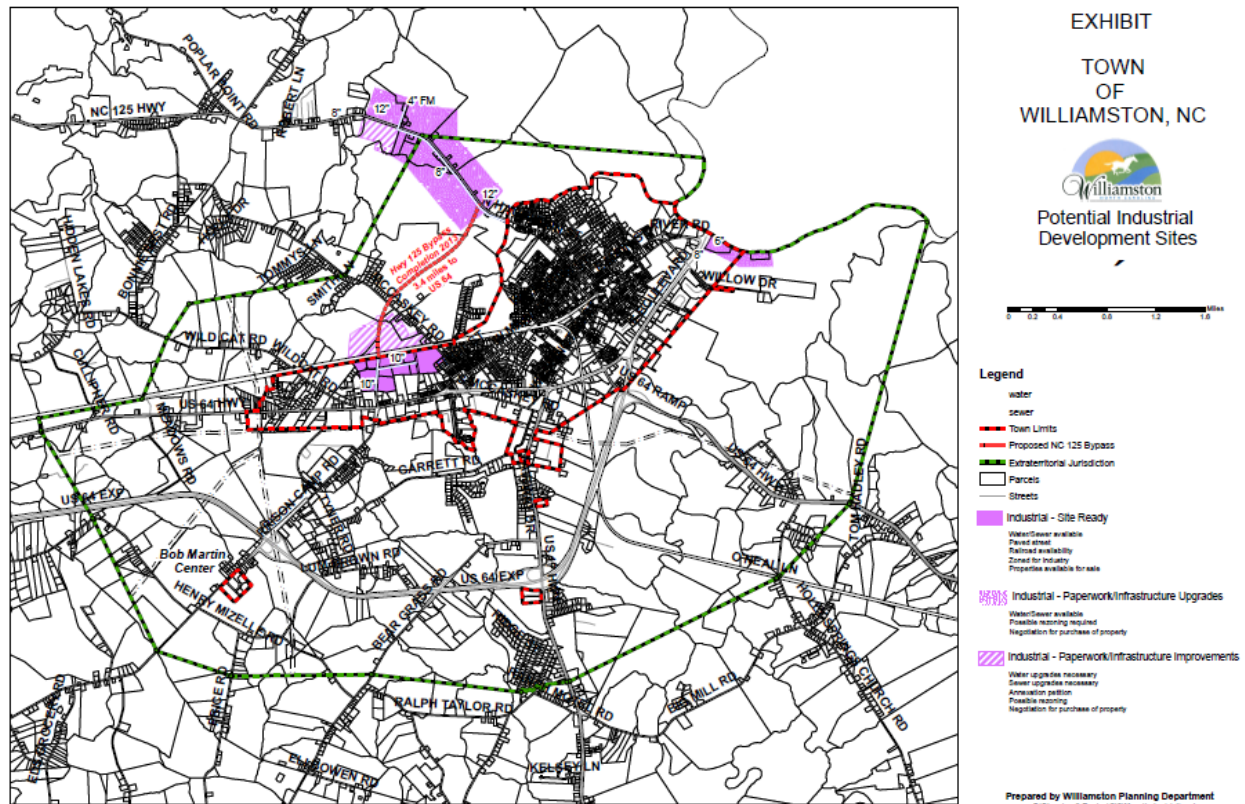
- LandsEast Industrial Park is a 777-acre joint development between Martin and Pitt Counties. The park lies on US 64A. It was certified by the Department of Commerce under the previous site certification program. There is electric service at the park, but water and sewer is more than one mile away in Bethel. There is rail access to the site.
- Martin County EDC is developing a 53,000 sq. ft. spec building on a 20+/- acre site in Martin Regional Business Park in Everetts. The project is being financed jointly by Martin County and a grant from Golden LEAF. The building is being designed with 30-foot ceilings and 40-foot column spacing. It will be adjacent to the Syfan facility. The park in Everetts has about 140 acres remaining.
- The former Winn-Dixie grocery store building in the Telecenter development is being upfitted to attract a new or expanding business. The project is being financed by Golden LEAF and Martin County. The project will bring the building space to a point that the end user can finish it out for a specific use.
- The EDC markets the former McMurray building near Jamesville as well as adjacent property known as the Jamesville Industrial Park. The building and site have seen recent prospect activity.
- The Domtar manufacturing facility has made some of their site available for industrial development. The site is served with infrastructure and rail.

Martin County has placed a focus on product development and has a good range of sites and buildings, especially with a new spec building under development.

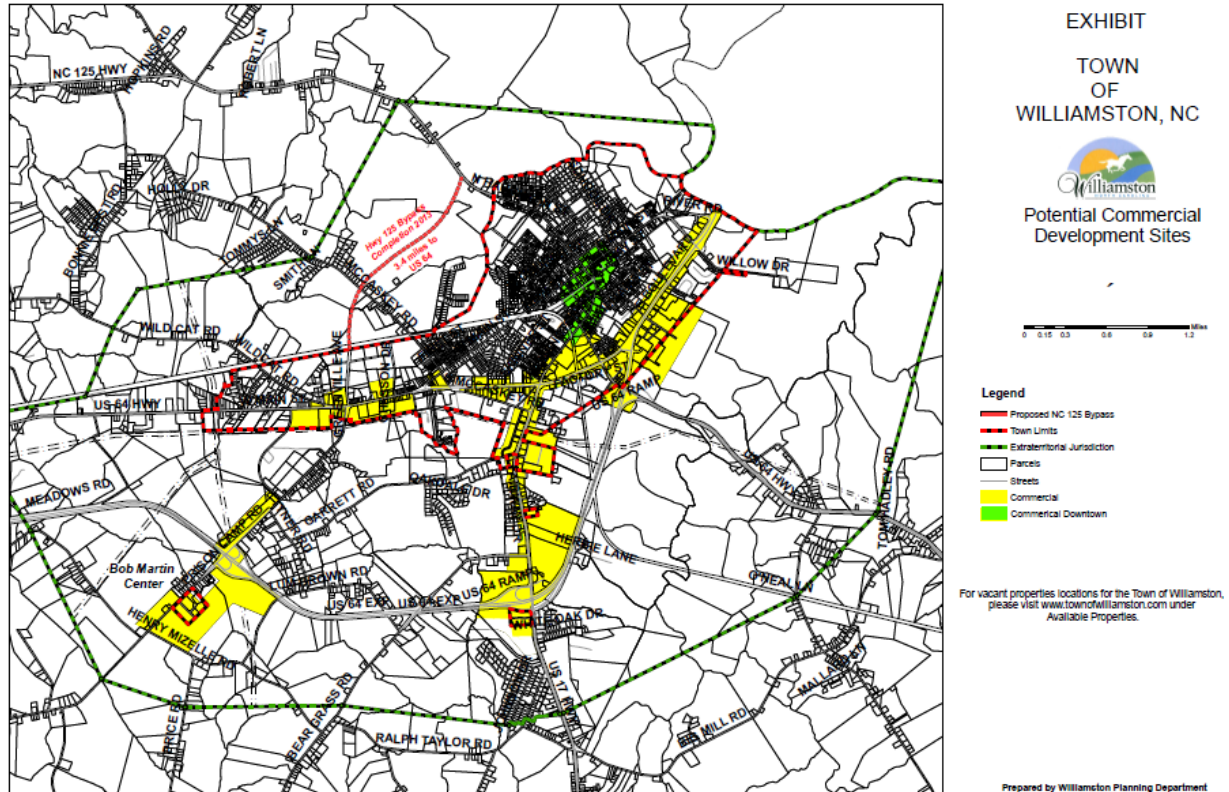
In addition, Williamston markets the Roberson Business Park. The 80-acre park is located on future NC 125 Bypass off US 64 /13. The park is served with water, sewer, rail, and electric utility. The park is subdivided into smaller lots of three to five acres.

- In the past, the park has been under a cloud due to questions of ownership and the inability to sell property. Those issues have been, or are being, resolved. In order to clearly promote the park, Sanford Holshouser recommends the Town forge a development agreement with landowners. The agreement could be an option or some other agreement that allows for clear marketing of the property for business development.
- The park would benefit from signage mark the sites as a business park development.
- Work with the EDC to develop a marketing brief on the site and list as available in site inventories.

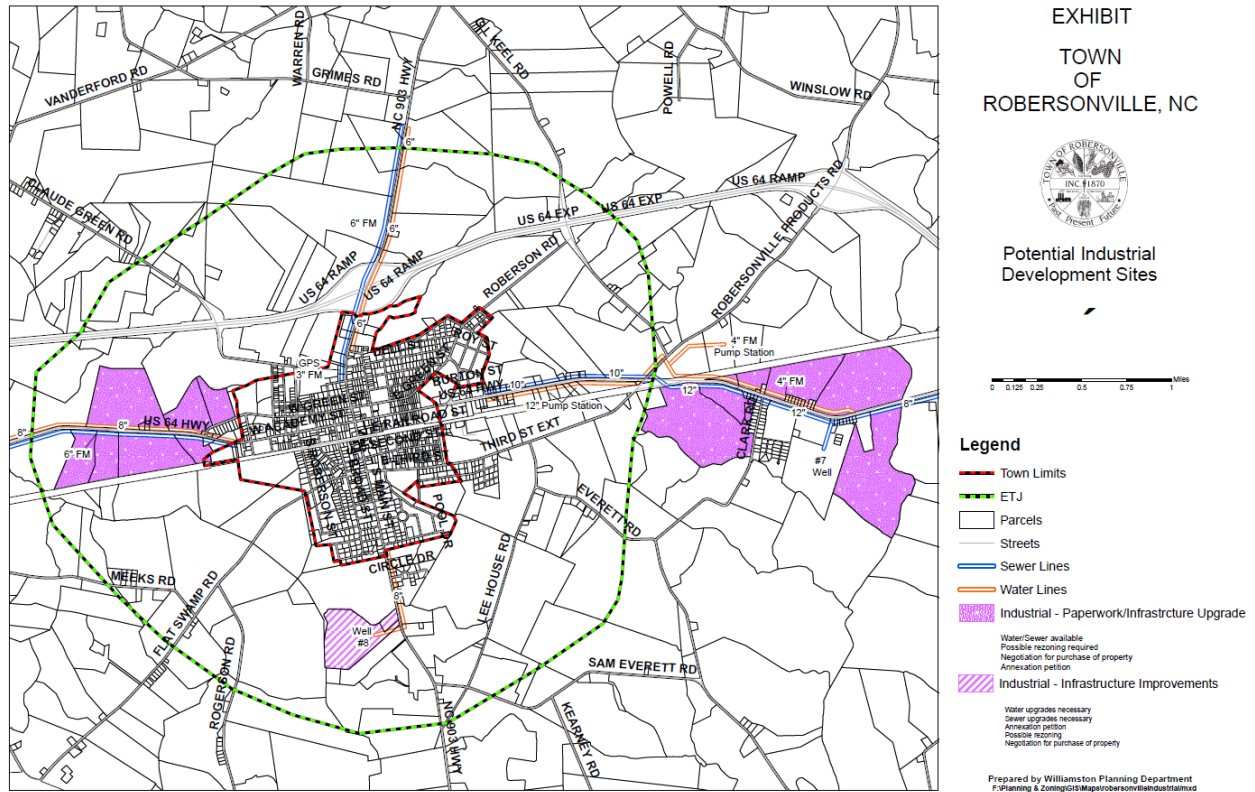
This map shows potential industrial development areas in Williamston. Larger maps are located as Exhibits later in the report. The Robersonville Business Park is shown here as well as areas to the northwest on Hwy 125 and to the east of downtown.



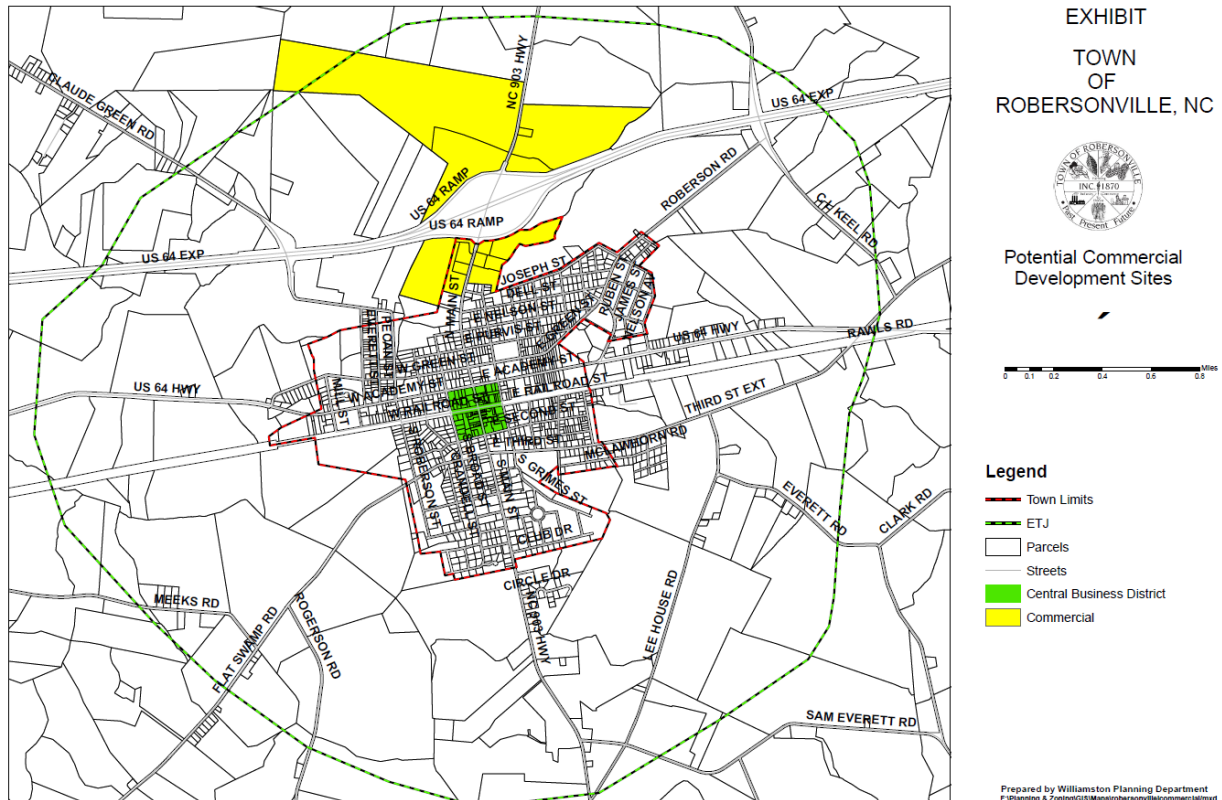
The areas shown in yellow represent areas of future commercial development for Williamston. The areas are near downtown as well as along major thoroughfares of US 64/US17 interchange and East Boulevard.



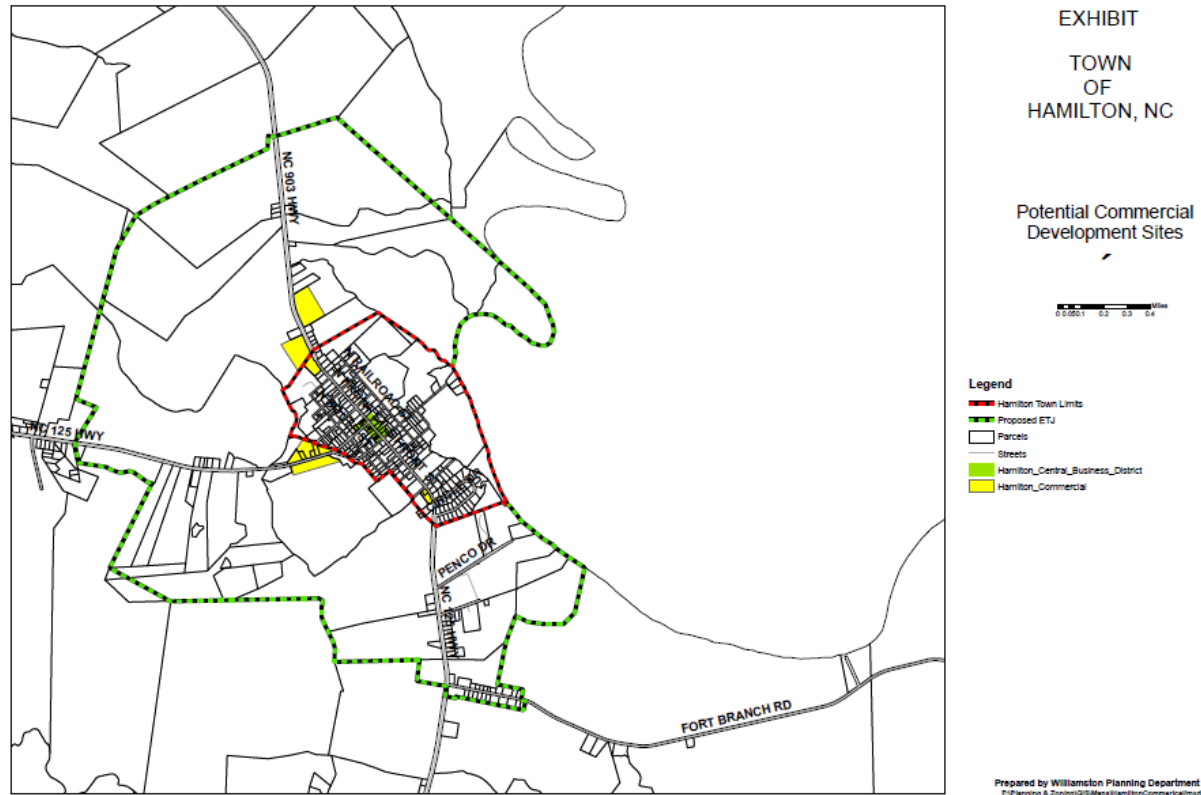
Robersonville's priority development area is along Railroad Road east and west of downtown. These areas are served with water and sewer.



Robersonville also has opportunity for commercial development, building upon the developments at the US 64 interchange. There is a convenience store and fast food already at the interchange. The map shows areas to the north and south of the interchange.



Potential commercial development areas in Hamilton include areas near downtown and one parcel in the downtown central business district.



due diligence phase. There is debate on whether actual certification is important. Some companies do request certified sites, and certification may help ease concerns of developing in a rural area. Some sites in urban areas may not need to be certified because the developability has been answered. In any case, the steps are a good check-off list of reviews.

Entrance and Access Roads

It is important to develop an access road from which the site/park can be shown.

Clearing and Grading

Sanford Holshouser recommends clearing and pre-grading for at least one site near the entrance of a business park development. This step helps the client visualize the development.

Virtual Shell Building

The old adage in economic development that communities cannot sell from an empty wagon is true. The fact that 80% of all relocating and expanding companies want an existing building means that communities must find a way to be competitive. Virtual buildings can be an important economic development tool to offset the lack of available industrial buildings. A virtual shell building is a certified or qualified site on which tailored building plans and a computer generated building, including a virtual tour of the site/park and building layout, have been developed. A virtual shell building can offer a greater variety of product for prospective companies.

Signage

Signage is important in new business park settings. It can be an important external and internal marketing tool. Signage signals a commitment by the community to develop the property and implies a certain level of control and research. Also, signage is an important internal marketing tool that informs the community of the county's efforts to attract new and expanding industry.

Curb Appeal

Approach the site as if you were a prospective industry. Looking at the property through an outsider's eyes will reveal many improvements to make the park more appealing. Landscaping the entrance and keeping fields mowed are just two ways to maintain an aesthetic appeal to the park.

Multi-Jurisdictional Parks

Multi-jurisdictional parks are one way to increase the investment pool to develop a park and build strong consensus around product development in a county or region. A multi-jurisdictional business park is just as it sounds, two or more units of local government partnering in the development of a business park. The costs are shared when developing the park, and incrementally increased property tax revenues are shared as property values increase due to development efforts and when companies locate in the park. The law firm of Nexsen Pruet (a

strategic partner of Sanford Holshouser) has played a lead role in this state of initiating the concept and has worked on most, if not all, of these joint efforts to date.

The multi-jurisdictional park concept offers an advantage in product development for Martin County and municipalities. The towns could partner with other towns and with Martin County in the development of such a park. For example, in Burke County all the towns and the county are joint investors in a multi-jurisdictional park. The advantage is having more than one local government share in the costs of the development of an industrial park thereby raising the overall resource limit, which leads to a superior product.

Despite the inherent difficulties of bringing together multiple units of local government, there are several examples of these transactions which have been successfully completed:

- LandsEast Industrial Park is a joint park between Martin and Pitt Counties. It is a good example for the towns to follow.
- Clay County, NC and Townes County, GA joint industrial park
- Agreement of Huntersville, Davidson and Cornelius (through the Lake Norman Regional Economic Development Corporation) to develop a series of business/industrial parks
- Agreement among Burke County and municipalities in Burke County to develop a series of business/industrial parks
- Vance, Franklin, Granville and Warren Counties agreeing to the joint development of four large acreage (500 acres +) industrial parks, known as Triangle North
- Brunswick/Columbus Counties' joint development of the International Logistics Park

Regionalism and partnerships are nothing new in economic development. However, participating in multi-jurisdictional parks is a new way to raise the level of product development.

Business Recruitment

Martin County EDC recruits the following target sectors: wood and forestry products, food, advanced manufacturing, green energy, and value added agriculture. The County's sectors align well with the targets of the Northeast Commission: automotive, aviation, boatbuilding/marine, heritage tourism, inner coastal development, and life sciences/biotechnology.

Aviation is not a target of the EDC; however, the aviation and aerospace industry is growing in eastern North Carolina and eastern South Carolina. In fact, the Carolinas are a hotbed for the industry right now. We recommend the EDC consider adding aviation as a target. It is not necessary to have a major airport or connections to a major airport. Many aviation companies are suppliers of parts and have the same location needs as other manufacturing companies and will fit into the advanced manufacturing target sector.

We see opportunity for all of the towns in these sectors. However, Hamilton and Robersonville may be better suited for advanced manufacturing, green energy, and value added agriculture given location, workforce, and agriculture history. Williamston, with its larger utility system, could handle food industry developments. Heritage tourism is a target of Martin County, spearheaded by the Tourism Development Authority, and is commented on later in this report. It presents an opportunity for each of the towns.

Martin County has taken a leadership role in agri-business with the Farmers Fresh Program and Farm City Banquet. The Farmers Fresh Program serves six counties making farm fresh produce available to chefs and individuals.

Marketing

External Marketing

To support business recruitment, Sanford Holshouser recommends the EDC's marketing dollars be prioritized by the following:

1. Website, see suggestions elsewhere in the report.
2. Client marketing materials with site and building informational sheets.
3. Visits to NC Commerce and hosting NC Commerce in Martin County as well as maintaining a close relationship with the Northeast Commission.
4. Participation in trade shows with regional and state development organizations, consultant calls, missions, and events in the County's target industry sectors. However, it is important to make the most of your travel and set appointments for your organization.
5. In conjunction with travel for regional and state marketing events,
 - a. Set appointments with prospects either through direct solicitation, or use a lead generation firm to set targeted appointments
 - b. Visit site selection consultants
 - c. Visit existing business headquarters

Marketing for business recruitment requires a long-term, consistent approach. Sanford Holshouser recommends that counties leverage their resources with regional partnerships and the State. Marketing is so very expensive that it makes sense for regions to market jointly.

Municipalities market for a wider audience: residents, tourists, existing businesses, prospective new residents, retail customers, and new businesses. Thus, municipal marketing materials are more general in nature. In each of Sanford Holshouser's meetings in the towns, marketing was cited as a need since there is little in the way of marketing materials for each town.

Williamston, Robersonville, and Hamilton do not want to be “best kept secrets.” They want everyone to know what a wonderful place it is to live and what a good location it is for business.

- Sanford Holshouser recommends the towns undergo a branding initiative and launch a proactive marketing program. In the case of Williamston, which has a brand, the brand should be reviewed for updates and relevance. Developing a brand is not just a logo or tag line; it defines how the community envisions itself and how it is perceived in the marketplace. The brand can be used when marketing to companies (industrial or commercial), tourists, new citizens, or internally to the community at large. The brand should be reinforced with marketing materials.
- Robersonville and Hamilton should take advantage of their relationship with ElectriCities of N.C. for branding marketing support.
- Williamston could partner with the chamber of commerce or TDA in the review/re-development of its brand and promotional materials. The last branding review in Williamston was a few years ago.
- Robersonville needs to update its website, and Hamilton needs to develop one – this will be addressed later.
- Develop a template for an in-house, printed, one-page, front-back community profile that outlines pertinent business data for the area. Include demographics, business base, housing, economic information, and other information useful to business and industry. The EDC could provide base data and a template it uses to provide county information.

Review of Websites

Sanford Holshouser’s review of the websites is primarily limited to economic development features. An overall comment about Martin County area websites is to link, link, link.

Martin County

- The glaring omission from the Martin County website is economic development. It is not listed. Even though the EDC is a separate entity, it should be listed under the “county government” and “find it here” tabs.
- Sanford Holshouser always likes to see street and mailing addresses on the homepage along with a phone number.

- The County Calendar function does not appear to be working and the tool will help coordinate local events.

Martin County EDC

Much of the EDC's website is under construction, and we understand that missing items are being worked on. We offer these recommendations as the site is being developed to enhance it as a marketing tool:

- Update target sectors and fill in information. This is a good spot to publish something similar to a "white paper" on why the industry is a good fit for Martin County.
- The Major Employers/Existing Industries list is a good place to insert testimonials.
- When the link takes the browser to NC Commerce's EDIS, see if there is a way to only show Martin County properties.
- We like the accolades and news page – the key will be keeping it up to date.
- Include cell phone numbers on the Contact Us page. Often, with only two staff people, it may be important to contact staff by mobile.

Williamston

- Now that the 2010 Census information is out, update the "Demographics" section.
- We like the "Williamston Video TourBook." It covers important topics including economic development.
- Suggest adding the street address to the home and contacts page.
- The Calendar works well and is updated. We also like the Recreation Department Calendar list on the homepage – it sends a message of community activities.

Robersonville

- Economic development is prominent on the homepage.
- Update "Available Sites & Buildings," which currently does not have any listings. Consider adding listings for retail, commercial, and downtown buildings. Also, include a

contact name, phone, and email on the buildings and sites page.

- Add email addresses for town staff under “Contact Us” as well as where staff are listed under “Town Services.”

Hamilton

Hamilton does not have a website – so the first recommendation is to develop one. A town website could provide information to residents, visitors, and businesses about town services, meetings, and activities and plans for the future. It would also be a place for visitors to find things to do and places to visit.

Internal Marketing

Many economic development programs overlook internal marketing. Local governments also overlook the importance of regular internal and regional public relations. Citizens want to know that their local government is working to better the quality of life. In these strained economic times, citizens want to know that the Town board is doing their best to create jobs.

Town Newsletters

Create a Town newsletter either online or limited mail distribution. Businesses and civic organizations will be aware of how local government is working for them. We also suggest mailing the newsletter to regional partners.

Guest Column

Investigate the opportunity to write a periodic guest column for the local newspaper on Town activities.

Joint Board Meetings

Once or twice a year, hold joint board meetings between the Martin County Board of Commissioners and municipalities to talk about economic development and other issues that the boards have in common.

Manager Networking

Organize a quarterly managers’ luncheon to share information on activities with municipal managers, the County Manager, EDC Director, and others. It is at these meetings where ideas on partnering, sharing resources, and collaboration are born.

Business Retention and Expansion

Martin County EDC understands the importance of supporting existing businesses. National surveys have shown that existing businesses represent 70% - 80% of new investment and job creation in a community. Business retention and expansion (BRE) programs are less costly than recruitment programs, decision-makers are local, and a strong BRE program supports business. It is a win-win proposition all around. Dollars spent on a BRE program are the best investment in economic development a community can make.

Following are BRE program recommendations aimed at strengthening the Martin County EDC program and expanding it. The consulting team has found that economic development organizations that are proactive in BRE reap substantially higher rewards than those that are passive.

Formalize the BRE Program

BRE tasks often get pushed to the back burner when new prospects come knocking or the organization is tackling a major initiative. Formalizing the BRE program will help ensure it remains front and center in the economic development program. Even though Martin County is a small county, business visitation and strategies need to be formed and carried out.

Create a Company Profile

We recommend creating a company profile that targets companies for the BRE program. Go beyond large manufacturing employers to small manufacturers, larger service businesses, tourism related companies, and small businesses of any type with growth potential.

Fortifying the Team

Education and training representatives work hand-in-hand with economic development staff. The BRE team will often make joint existing business visits with educational specialists. Referrals will be passed from one agency to another base on specific issues and needs of a business. Like any team, it needs practice.

Survey

Now is an ideal time to conduct an existing business and industry survey. Determining how companies are faring following the Great Recession will help the EDC focus retention resources. Surveying is important because it captures a snapshot of the health of businesses at a single point in time whereas visiting companies provide in-depth information but across a longer time period.

Visitation

Communities take differing approaches to visitation. Some use a rotating team of trained volunteers. Others use volunteers for a blitz of visits over approximately two weeks. The majority of economic development organizations similar to Martin County use staff to make

visits. Sanford Holshouser endorses this approach because one of the primary goals of the BRE program is to build a partnership, and that is hard to do if the “face” of BRE changes quarterly.

Confidentiality

Just as in business recruitment, BRE programs may access confidential company information. Confidentiality is even more critical in BRE because word of a layoff or closing spreads faster than wildfire. We recommend the development of a confidentiality policy with a written non-disclosure agreement that can be utilized when needed and appropriate.

Appreciation and Recognition

It used to be that communities would tout a good BRE program when, in fact, all it did was host an annual golf outing. While golf outings are appropriate, showing appreciation in other ways is important because economic developers from other communities regularly recruit Martin County companies. The EDC and Chamber have a joint appreciation and recognition event and are encouraged to continue it. In addition to one-day events, recognize businesses with guest columns in local newspapers and submit local companies for regional and state business recognition awards.

BRE Brochure

The BRE program should have a marketing brochure. It can serve as a leave behind information piece and a mail-in-advance-of-the-visit piece. Post the brochure on the website. The Gaston County EDC’s BRE brochure is a good example of such a piece. It describes services available to existing businesses through the EDC. It also highlights local companies. The one-pager could be printed in house until funding allows for professional printing.

Resource Directory

When conducting a visit with a local business, there are many resources (service providers) to discuss: community college training programs, university outreach, SBA financing, expansion assistance programs, environmental regulation support, tax and regulatory assistance, etc. Companies often find the volume of information overwhelming. Randolph County EDC does a good job of posting business resources on their website.

Existing Businesses as Ambassadors and Recruiters

Existing businesses are the best recruiters in a community. Peer-to-peer contact has proven to be the most effective means of marketing in economic development. Martin County is fortunate in that it has strong clusters in wood products and other manufacturing. The plant managers and CEOs can become the best source of leads for business recruitment.

Early Warning System

Many newcomers to BRE think that the program only focuses on expansions when, in fact, a good BRE program focuses on the entire business cycle. The goal of an early warning system is to identify at-risk companies and to begin working to assist the company in advance of a layoff

or downsizing. Develop a profile of at-risk firms including employment declines, facility at capacity, land-locked site, changing technology, etc. Following each visit, quickly review information to see if any of the red flags have been raised.

Incentives

One of the biggest complaints of existing businesses is that communities give incentives to new companies while doing nothing for existing businesses. Sanford Holshouser suggests lowering the thresholds of investment and jobs for expanding companies to qualify for local incentives in order to create a better environment for existing companies.

Municipal Participation in BRE

BRE programs are typically carried out at the County level, but there is a role for municipalities to play. Robersonville is home to the County's largest private employer, Ann's House. The company has completed multiple expansions over the years and is the ideal candidate for regular BRE visits.

The EDC Director regularly meets with local companies and assesses expansion or contraction potential. Sanford Holshouser does not recommend a duplication of this effort; however, Town staff should:

- Regularly contact businesses, form relationships, and coordinate any expansion projects and retention efforts with the County. Town staff, in some cases, may accompany the EDC Director to visit companies.
- Develop or expand a town newsletter to keep businesses, as well as citizens, informed.
- Inform businesses about town plans for ordinance changes, beautification efforts, downtown development, and anything that will impact the economic climate.
- Include local business people on town committees and advisory groups for input into downtown planning, tourism development, and planning and zoning.

Commercial and Retail Development

Retail development will happen on its own as the economy grows, but retail may not develop in the way the community wants it to develop. Because communities and companies are aware that esthetics and diversity of retail options are part of attracting talented workers (which attract companies), they are no longer willing to let retail and commercial development just happen.

Martin County's role in retail development can be as broad or as narrow as the EDC desires. However, retail development should be a focus of economic development at the municipal level. Extending infrastructure to key commercial areas, maintaining an inventory of commercial sites, working out agreements with land owners, creating an overall development plan, and marketing to commercial and retail businesses are just a few ways local governments can encourage retail and commercial development. Williamston maintains a listing of available commercial buildings on its website.

Having real estate information available is the first big step in attracting developers and small business owners.

- Focus on in-fill areas in Town. Underutilized sites and buildings are ideal for retail and commercial development. These properties already have infrastructure in place, and most are in the central business district with good traffic and parking. There are underutilized properties in the downtown area.
- Determining willingness to sell, and at a firm price, is an important step before marketing property for any commercial or industrial use.
- Maintain an inventory of available sites with information on each, such as owner, sales price, condition, aerial photo, tax value, flood plain, zoning, access roads, adjacent land uses, traffic counts, etc. Williamston has properties listed on its website.
- Create a marketing brief sheet for each commercial site. This can be done in-house in the beginning and moved to professionally designed flyers as budget allows.

The second step is providing developers with market data. In the Equine Development Strategy Report, Sanford Holshouser recommended the EDC create a "market profile to recruit major retail establishments." Data gathering is an important support role in which the EDC could play to assist.

Hamilton and Robersonville should work with ElectriCities on retail recruitment. ElectriCities has established a Retail Recruitment Program that works with communities to identify and market commercial and retail sites to major chain stores and developers.

Small Business Development

Retail Leakage

Sanford Holshouser used ESRI, a private data source, to gather retail leakage information. The reports can be found in Appendix B. The report estimates supply as sales to consumers by establishment. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. It is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales.

Martin County's total retail demand is estimated at \$180 million, and retail supply is estimated at \$126 million, which leaves a retail gap (leakage) of \$54 million. The majority of leakage is in Food & Beverage Stores, Grocery Stores, and General Merchandise Stores. There are opportunities to attract businesses in these sectors as well as Furniture, Building Materials, Clothing, Food Services & Drinking Places, and Limited Service Eating Places.

Motor Vehicle & Parks Dealers

The real opportunity within this industry is in Other Motor Vehicle Dealers (NAICS 4412). This industry group comprises establishments primarily engaged in retailing new and used vehicles (except automobiles, light trucks such as sport utility vehicles, and passenger and cargo vans).

The \$3,756,593 leakage at the county level could be captured by a local automobile dealer who expands the lines of vehicles available. Out of the three towns, Williamston has the greatest leakage in this area of about \$832,898.

Furniture & Home Furnishings Stores

Within this sector, the greatest leakage is in Furniture Stores (NAICS 4421). This industry comprises establishments primarily engaged in retailing new furniture such as household furniture (e.g., baby furniture box springs and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings, or floor coverings.

There is leakage at the county level of \$3,476,129, 100% leakage in Hamilton and about 50% in Robersonville. However, Williamston has an oversupply. There is opportunity for an existing furniture store in one of the towns to expand, or open a satellite location to capture dollars that are now leaving the County.

Electronics & Appliance Stores

This industry sector (NAICS 443/4431) is small with total demand at about \$2.3 million and about \$1.6m in leakage at the County level. There is opportunity for an existing business to expand and capture more of the dollars that are leaving the County.

Building Materials, Garden Equipment & Supply Stores

The largest segment in this sector is Building Materials and Supplies Dealers (NAICS 4441).

With leakage at \$3m, there is opportunity for an expanding or new business. Williamston captures most of this market; however, there is about \$1.2 million not captured there.

Robersonville is losing all of the money spent in this sector, and Hamilton is losing about half.

We recommend Hamilton work with an existing business to expand into this sector.

Robersonville's leakage of \$321,754 would not be enough revenue for a new business; however, an existing business could begin selling some materials and supplies, or open a small satellite, to capture part of the market.

Food & Beverage Stores

Grocery Stores have the largest share of this sector at \$26.9m. Hamilton is losing all of its \$432,631 retail market in the Grocery Store sector. Robersonville is meeting almost all of its demand of \$1.5m (there is a little room to capture another \$209,445). Williamston is providing \$1.3m in sales above and beyond its \$6.1m market. The real opportunity here is the \$12.5 million that leaves the County each year.

Health & Personal Care Stores

There is a retail gap at the County level of about \$3m. Robersonville is meeting its demand for health and personal care products. Hamilton has complete leakage although it is a small market of \$121,711. Williamston is providing about twice its own demand in this sector. Even with Robersonville and Williamston meeting or exceeding demand, there is still a gap of \$3m at the County level.

Gasoline Stations

Hamilton draws people into town for gasoline because it has an oversupply. Robersonville shows complete leakage, which may mean that the data has not been updated since gasoline stations were brought into the town limits. Williamston shows an oversupply of about \$4m. The County still has net leakage of about \$11m. Each of the towns has opportunity to capture more of the County market by encouraging new gas stations to be developed or existing stations to upgrade.

Clothing and Clothing Accessories Stores

Even though there is leakage in Shoe Stores (NAICS 4482) and Jewelry, Luggage, and Leather Goods Stores (NAICS 4483), the largest segment of the sector is Clothing Stores (NAICS 4481). This is an area where all the towns and County show leakage. This industry group includes establishments primarily engaged in retailing new clothing. The amount of leakage, \$2.2m, may

be enough to cause existing clothing retailers to expand or similar businesses to expand into clothing. It may also be enough revenue to cause new business start-ups.

Sporting Goods, Hobby, Book, and Music Stores

This is another sector where all of the towns and the County have leakage. However, the sector is small with the total County market less than \$1m. Breaking down the sector, the greatest leakage is in the Book, Periodical, and Music Stores at about \$500,000. This revenue figure may be enough for a small business owner to expand into books and music.

General Merchandise Stores

Out of a total demand of \$27m, \$18m is being supplied leaving a gap of \$9m. Within the sector, the real opportunity is in Department Stores Excluding Leased Departments (NAICS 4521) where the County gap is \$9m, Williamston's gap is \$2.3m, Robersonville's gap is \$866,591, and Hamilton's gap is \$563,282. The industry definition refers to establishments known as department stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel, furniture, appliances and home furnishings, and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys, and sporting goods. Merchandise lines are normally arranged in separate departments.

Miscellaneous Store Retailers

There is some opportunity for Florists (NAICS 4531), Office Supplies, Stationery, and Gift Stores, and Used Merchandise Stores (NAICS 4533). Out of this miscellaneous group, florists and office supplies have the greatest potential. The markets in each of the towns are too small to warrant a new business starting up. However, there is \$631,010 in leakage at the County level in florists and \$772,187 in office suppliers. Any new expanding business would need to capture County shoppers.

Nonstore Retailers

There is leakage at the County and municipal level in Direct Selling Establishments (NAICS 4543) defined as establishments primarily engaged in nonstore retailing (except electronic, mail-order, or vending machine sales). These establishments typically go to the customers' location rather than the customer coming to them (e.g., door-to-door sales, home parties). Examples of establishments in this industry are home delivery newspaper routes; home delivery of heating oil, liquefied petroleum (LP) gas, and other fuels; locker meat provisioners; frozen food and freezer plan providers; coffee-break services providers; and bottled water or water softener services.

Total leakage in the County is \$1.7m. The interesting point with this sector is that there is total leakage in each town and 80% leakage at the County level.

Food Services & Drinking Places

The County has a surplus supply of Full-Service Restaurants (NAICS 7221) but leakage in Limited-Service Eating Places (NAICS 7222). The latter is defined as establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery.

Hamilton has total leakage in all areas of Food Services & Drinking Places. Robersonville has an overall over-supply, especially in Full-Service Restaurants, but leakage in Limited-Service Eating Places. Williamston has over-supply in all segments of the sector except Drinking Places – Alcoholic Beverages (NAICS 7224).

All of the towns should encourage Limited-Service Eating Places as there is a gap in all except Williamston. This type of food service would serve people traveling through the area on the way to the Coast. There is oversupply in Full-Service Eating Places, so there appears to be little opportunity in that segment, unless a new tourism destination was developed and increased demand in that segment beyond the current \$8.7m supply.

Bear Grass has helped several small businesses with space in the former school facility. It is developing a model of incubator support. The redeveloped school kitchen is being explored for commercial shared-use.

Services to Outerbanks

Sanford Holshouser examined opportunities to sell goods and services particularly to the Outerbanks since US 64 provides a direct connection to the area. Already the Farmers Fresh Program has found a way to bring outside dollars into Martin County by selling fresh produce to five counties outside Martin (Beaufort, Bertie, Dare, Edgecombe, and Pitt). We found opportunity in the following areas:

- Automotive dealers, parts, accessories, and tire stores (\$54 million market opportunity). A local store could expand to the Outerbanks or form a partnership with an existing store in the area.
- Electronics and appliance stores (\$1.3 million market opportunity). This is another area for local expansion or partnership. Repair services could be a part of the expansion.

- Lawn and garden equipment and suppliers stores (\$2 million market opportunity). The Outerbanks area is oversupplied in building materials, likely due to the focus on residential building, but has \$2m in retail gap for lawn and garden equipment.
- Not available in the dataset was information on health care services. Often health care services, such as home health care and physical therapy, are provided from regional centers. Martin County could be a hub to provide this care in multiple counties.

Equine Industry Development

Sanford Holshouser recently completed an Equine Development Strategy for Martin County in May, 2011. The study recommended ways Martin County, through the Bob Martin Center, Martin Community College, Economic Development Corporation, and Tourism Development Authority could bolster the equine industry. Many of the recommendations in that study are applicable to this economic development strategic plan – especially in small business development. We do not repeat all of the recommendations here but encourage the full reading of that report. However, we do cite the most relevant:



- New programs at MCC such as Equine Veterinarian Technology, Hospitality Management, and Farrier.
- Expansion of events at Bob Martin Center (BMC). For example, the BMC could host regional conferences and meetings, expos, and other events that bring people to the area for non-equestrian meetings.
- Hotel and retail recruitment to host horse show attendees and offer entertainment.
- Expanding amenities to encourage more event visitors to stay in Martin County.
- Increased coordination of marketing to maximize horse show visitors.
- Opportunity for Hamilton to partner with Martin Community College to develop student housing in the former Baptist Home that has been donated to the College as well as other

opportunities to utilize the property such as camps and retreats. Student housing solutions are needed and should be pursued if the Hamilton property is not feasible.

Tourism

Tourism in Martin County needs a destination, multiple destinations in fact. The TDA markets the current points of interest; however, other than the Bob Martin Center, there is not a tourism destination.

- The one-room school in Williamston is not open to the public even though the inside replicates a traditional one-room school. In Robersonville, the St. James Place Museum (private) is open by appointment. Fort Branch is only open weekend afternoons in the spring and summer. Through volunteer effort, we recommend these destinations, and others, be open for regular hours to allow visitors to take full advantage of these historic places.
- Robersonville is home to East Carolina Motor Speedway. Motorsports is big business in North Carolina – approximately a \$5 billion industry in the state. This is the town's largest tourist attraction. In the 2005 NC Motorsports Study, Sanford Holshouser found that communities do not regularly capitalize on their local motorsports venues. We recommend Robersonville meet with Speedway officials to discuss maximizing tourist traffic.
- Williamston has a historic district designation, but Robersonville and Hamilton do not. The designation encourages redevelopment be consistent with historical architectural features and offers tax incentives for redevelopment. Historic districts also encourage tourists to stop and visit the area. Robersonville and Hamilton should investigate developing a historic district.
- All of Martin County has opportunities to develop tourism centered on the Roanoke River; however, Hamilton has some specific advantages. It is halfway between the sound and the Roanoke Rapids Dam. The boat ramp in Hamilton is the only one between Williamston and Scotland Neck. These attributes could be used to attract businesses that cater to and supply canoeists/kayakers and other outdoors enthusiasts. In addition, because of the large interest in fishing for shad and rockfish, there is an opportunity for locals to develop guide service businesses. Williamston has been efficient at obtaining grants to develop along its waterfront, and we recommend Hamilton seek grants to do the same.
- The Deadwood western theme park is an asset that could be expanded. Similar western-themed parks include craftspeople that provide demonstrations as well as sell their craft.

The western town design would lend itself well to renting spaces to craftspeople such as a blacksmith, wood carver, or jewelry designer.

- The Bear Grass community is a charming crossroads not far from Williamston and a day trip from Greenville. Already the community has attracted artists. The former Bear Grass school is now being used as a community center, small business incubator, and recreation facility. Partnership with the Arts Council would boost this area as a day trip destination from Greenville. Already people come to this area to visit Deadwood.
- The Jamesville area is now home to a new boat launch and fishing pier. These assets will bring more people to the river for tourism and outdoor activities. Jamesville is also home to the Cypress Grill, a well-known restaurant featured in national publications, and the Jamesville NC Herring Festival.
- Mentioned below briefly, the Bob Martin Center could become a destination point by attracting regional conferences and meetings. The meeting facilities at BMC could host regional agency workshops, multi-day conferences and other non-equestrian events.
- One of the ways municipalities can support tourism is through amenity development. Facilities such as parks, wellness centers, recreation facilities, bicycle paths, theaters, etc. serve citizens and visitors alike.

Workforce Development

Workforce development is not led by the EDC or any of the towns; however, it is perhaps the most critical ingredient to long-term economic success. Today, companies follow talented workers, and communities that can develop, attract, and retain talented workers are the most successful. Martin County has made significant strides in workforce development. The Career Readiness Certificate Program (mentioned on the next page as part of the Wayne WORKS initiative) is now being implemented at MCC.

- The Equine Development Strategy, cited below, identifies the need for new community college training programs such as farrier, equine veterinarian technology, and hospitality management.
- There is already underway an initiative to develop a new, agriculture-focused high school program.

- Sanford Holshouser is a fan of educational programs such as the Burke County Education Endowment which will allow every Burke County high school graduate to attend two years at Western Piedmont Community College at no cost.
- The WorkKeys Assessment tool is a program implemented by Wayne County. The County created Wayne WORKS (Wayne Occupational Readiness Keys for Success) which requires each high school junior to complete a WorkKeys Assessment. Today, Wayne County has more Career Readiness Certificates awarded than any other county in North Carolina. The program is funded by Wayne County following a pilot, grant-funded project.

Martin Community College is developing WorkKeys in high schools now, and we recommend the expansion of the program similar to Wayne County.

Incentives

The nature and contents of local government industrial recruitment incentive policies vary widely from location to location. Given that there is very scant guidance in the enabling statute (N.C.G.S. § 158-7.1) and that judicial guidance by way of appellate decisions is limited, it is impossible to say that one form of an incentive policy is right or wrong. However from an extensive practice in the area of incentives, the law firm of Nexsen Pruet, PLLC, an affiliated entity to Sanford Holshouser Economic Development Consulting, has reached certain conclusions regarding the form of an incentive policy which is the most defensible against a legal challenge and is most effective as an economic development tool.

Attorney Ernest Pearson, formerly affiliated with the law firm of Sanford Holshouser, LLP, now with Nexsen Pruet and Sanford Holshouser Economic Development Consulting, reviewed the Martin County policy, which he authored several years ago. With just a few comments noted below, it is still in acceptable form, given today's competitive environment and taking past court rulings into account.

This form of incentive policy encompasses terms we believe are best for this type of policy:

1. The incentive policy is stated in general terms and does not specify a certain amount of incentives in relation to specified levels of job creation and investments. This enhances Martin County's competitive advantage because the company being recruited and competitor locales cannot determine what the County's "bidding levels" are from what would be a public record. The County's industrial recruiter should be provided with confidential guidance on the level of incentives that may be offered.

2. The policy sets forth in a preamble what the public policy considerations are that led to this policy. In the event of a challenge of this policy or any incentives granted hereunder, the fact that the governing board gave consideration to compelling economic needs would be of use in such litigation as to any public purpose argument raised. These economic imperatives should be updated to reflect the current conditions in the County and should be updated periodically thereafter.
3. The policy principles upon which future recruitment projects and incentives will be based are stated. This gives the governing body a framework within which to evaluate each project.
4. Program parameters that outline relevant considerations the governing board will weigh in evaluating the amount of incentive support it will provide for a project, if any, are stated. This guides decisions by elected officials.
5. Provisions in the policy regarding minimum project qualifications are important to allow projects that are too small to reasonably impact the County, to be “weeded out” of consideration at the start.
6. Sometimes a project can qualify pursuant to all minimum qualifications and other factors, but for some other reason that type of project is just not right for the County. Consequently factors that might cause a project to be excluded from consideration for incentive grants are correctly included.
7. The policy appropriately states the uses to which incentive grants can be applied. These should be uses that leave permanent value in the County. That way, if a company closes a facility before the term of the incentive agreement has expired, the County’s investment is still returning value to the community.
8. It is advisable that the policy briefly state the process through which an incentive project will be considered, as is the case in this policy.

All of the above elements play a part in a well written incentive policy. This form of incentive policy very adequately serves this purpose. It is recommended that the proposed incentive policy be updated as noted above concerning economic conditions in the County. Otherwise, it is a very effective and legally defensible policy.

Additional Incentive Information

In addition to County level incentives for business recruitment, some towns are implementing incentive programs for downtown redevelopment and retail/commercial recruitment. Audubon International’s Sustainable Communities Program recommended downtown incentives. We

recommend Williamston, Robersonville, and Hamilton review the following incentives and determine if any are appropriate for their municipality.

Robersonville has a downtown Awning Grant program set to expire in 2011. We recommend the program be extended. Williamston has a façade grant program that we recommend the Town continue.

Below we list some downtown/retail incentive programs in North Carolina that could be adopted by the municipalities. Sanford Holshouser highly recommends low interest loan pools such as the one noted in Wilson. More information on all of these grant programs can be found on the website of the respective city/county.

Gastonia

Investment in Downtown Economic Assistance and Livability Program offers short-term start-up financial assistance to new restaurants, retailers, and entertainment venues within a defined area in downtown. The program offers direct incentive grants, in the form of partial reimbursement of lease and/or up-fit expenditures, associated with the opening of new restaurants and retailers.

Hickory

There are several grant programs in Hickory designed to redevelop distressed commercial and industrial areas: Vacant Building Revitalization Grant offsets some of the cost of building renovation; Community Appearance Grant encourages improvements to building exteriors; Landscape Grant targets improvements to outdoor landscaping; and Commercial Revitalization Area Tax Incentives targets larger commercial development projects.

Guilford County

The Commercial Investment Policy makes available an incentive grant to commercial businesses investing \$10,000 or more in real property improvements.

Asheville

The Business Development Grant program targets small businesses, investing \$250,000 - \$1,499,999, and offers a grant of up to 75% of net new property tax revenue for each of three years.

Wilson

The Rent Incentive Grant, up to \$6,000 for one year or \$8,400 for two years, focuses on increasing Pedestrian Oriented Businesses. The purchase of buildings in the Central Business District is encouraged through the Owner Occupied Building Incentive Grant Program, which grants up to \$8,400 toward the purchase of a building in which a Pedestrian Oriented Businesses is opened. Wilson also has a Façade Grant Program and a Downtown Loan Pool.

Available Downtown Building Inventory

Sanford Holshouser recommends each town maintain an inventory of available downtown buildings. The inventory will aid small business start-ups and others in locating appropriate space. The City of Lincolnnton does an outstanding job of maintaining information on downtown properties. It keeps data on all available downtown buildings (on its website) to include:

- Square Feet
- Address
- Square Foot Price
- For Sale/Lease (Per month)/Terms
- Contact Company
- Contact Name, Phone
- Present Use
- Last Use
- Details



The Chamber of Commerce could be a partner to generate and upkeep this information.

The 2009-2010 Williamston Comprehensive Plan noted the need for an inventory of buildings within the historic district. With the recommendations for historic tourism, it would be wise for all towns to keep an inventory of historic properties, whether or not they are located within a historic district.

Williamston has a listing of available properties on its website under “Business – Available Properties.” We recommend inserting a table at the top of each area’s listing that summarizes the buildings available in that area, such as a table summarizing availability in area #2 (downtown).

Gateways & Appearance

Gateways and signage are critical for a tourism destination. The 2002 Downtown Market Analysis and Marketing Strategy for Williamston recommends improvements such as creating an entry statement with a horse statue at the US 17/Main Street intersection and enhancements at the following entry points: Washington Street/Haughton Street, US 17/East Main Street, and NC 125 northwest of downtown. Enhancements are also needed at the major entry points to Robersonville and Hamilton.

- Hamilton's primary gateway is Hwy 125 from Williamston. There is a building wall as you enter town on which a mural could be created. Local artists are often good partners in appearance enhancements.
- Robersonville's signage at its main entrance on US 64 cannot be lit due to electric utility issues. In the leadership group discussion, it was recommended the town look into alternative lighting options.
- Williamston also noted a lighting issue (although different in nature) with one of its gateways, exit 514 on US 64. The highway leading to town is not lit with street lights or commercial business lights. Travelers like to pull off the highway in well-lit commercial zones, and this could be a detractor for that gateway.
- Each of the towns and County should create an Appearance Advisory Committee that would work with Planning and Zoning to review any new and remodeled developments to ensure they meet with municipal and county appearance standards. Williamston has an appearance commission.
- Partner with garden clubs and other civic organizations to plant and maintain small niche gardens.

Leadership Development

The main difference between communities that are successful and communities that are not is leadership. Sanford Holshouser saw several signs of positive, forward thinking leadership such as the amount of grants captured to develop amenities in Williamston. We also saw areas in which leadership has failed to capture opportunities.



Follow Through

Martin County, and especially Williamston, have now been studied thoroughly (comprehensive plan, Moratoc Park Study, BMC Visitor's Study, Downtown Market Analysis, Equine Study). It is now time for implementation. Leadership will need to be a driving force to follow through on a number of the recommendations and action steps laid out in this strategic plan, as well as all of the other recently completed studies.

Future Leadership Development

Some communities have developed local government academies to groom future leadership. These academies consist of educational programming in a seminar format. For example, the class will meet once a week for six to eight weeks or once a month over six to eight months. Each meeting will cover the basics of the main areas of local government such as law enforcement and public safety, education, economic development, town/county budget/taxes, planning and zoning, utilities, etc.

Many communities across North Carolina have developed leadership programs aimed toward developing future leaders. Most often these programs are run out of chambers of commerce, sometimes in partnership with the community college. Martin Community College has shown an interest in developing such a program in the past.

Youth Leadership Development

As the population in Martin County ages, it is imperative that young people be groomed for leadership positions. We recommend including young professionals, and even high school youth, on community boards, commissions, civic boards, and other leadership groups.

Updating Town Government

Williamston has a position of “Director of Planning and Development.” We suggest the Town consider renaming the department to “Planning, Zoning, and Development” to reflect a focus on economic development and the responsibility of the Director of Planning and Development.

Residential Development

Martin County has an attractive rural, small town lifestyle. Some parts of the County are seeing people move in order to commute to Greenville or other areas. There is also growth in the retired and semi-retired population. Some of the towns are developing the type of amenities that will attract new residents such as recreation and entertainment. Robersonville has a specific advantage because of its proximity to Greenville, 20 miles.



Currently, the residential development market is still suppressed. It is a good time to research tracts of land that would make good developments in the future. Research the tracts, talk with owners about willingness to sell, and begin contacting residential developers in neighboring communities, such as Greenville, to propose new development areas.

The City of Morganton began a residential development incentive program some years ago targeted to developers of active adult (retired and semi-retired populations) residential units. The incentive included low interest loans, maximum of \$10,000 per residential unit, and matching grants for marketing properties. Other communities have partnered with developers by extending infrastructure, waiving some fees, and expediting the permitting process.

Strategies Summarized

Throughout this report, economic development strategies have been recommended for Martin County and each of the towns. Here, we summarize strategies for each municipality. We recommend a full reading of the report to fully understand the scope of the strategy and recommendation.

Williamston

- **Business Site Development**
 - Roberson Business Park
 - Marketing agreement
 - Signage
 - Data sheet and listings
 - Explore multi-jurisdictional park arrangement with Robersonville, Hamilton, and Martin County
 - Apply due diligence steps to future industrial sites noted on maps
- **Retail / Small Business Development**
 - Work with MCC Small Business Center on these opportunities
 - Expand Motor Vehicle & Parts Dealers
 - Expand Furniture & Home Furnishings Store
 - Expand Electronics & Appliance Store
 - Expand Clothing Store
 - Expand General Merchandise Store
 - Expand information on available buildings
- **Existing Business Support**
 - Regularly contact businesses
 - Town newsletter
 - Include business leaders in town leadership roles
- **Marketing**
 - Brand review in partnership with other agencies that use a Williamston/Martin County brand such as the TDA
 - Partner with Chamber and TDA to develop general marketing materials

- **Internal Marketing**
 - Newsletter
 - Guest Column
 - Joint Board Meetings
 - Manager Networking
- **Downtown Development**
 - Expand Building Inventory to include downtown properties and more information on downtown properties
 - Downtown Incentives
- **Tourism**
 - Open one-room school to the public to create a destination
 - Better capitalize on BMC show attendees
 - Amenity development: parks, recreation, wellness
- **Gateways and Appearance**
 - Enhancements at entry points
- **Website Updates**
 - Update Demographics section
 - Add street address to home page
- **Leadership**
 - Update Planning and Zoning Department to Planning, Zoning, and Development Department

Robersonville

- **Business Site Development**
 - Explore multi-jurisdictional park arrangement with Williamston, Hamilton, and Martin County
 - Apply due diligence steps to future industrial sites noted on maps
- **Retail / Small Business Development**
 - Promote new development at the intersection of US 64/NC 903 to developers for fast-food, convenience store, small commercial strip center
 - Work with ElectriCities Retail Recruitment Program and MCC Small Business Center on these opportunities
 - Furniture & Home Furnishings
 - Limited-Service Eating Places
 - Expand Building Materials, Garden Equipment & Supply Stores
- **Existing Business Support**
 - Regularly contact businesses
 - Town newsletter
 - Include business leaders in town leadership roles
 - Review ElectriCities Key Accounts Program for strategies with key electric customers

- **Marketing**
 - Brand Development
 - Partner with ElectriCities to develop marketing information for the Town
- **Internal Marketing**
 - Newsletter
 - Guest Column
 - Joint Board Meetings
 - Manager Networking
- **Downtown Development**
 - Downtown Building Inventory
 - Extend Awning Grant
 - Downtown Incentives
- **Tourism**
 - Further develop St. James Place Museum
 - Better capitalize on BMC show attendees
 - Seek historic district designation
 - Amenity development: parks, recreation centers
- **Bedroom/Retirement Community**
 - Identify and promote future residential development areas
 - Inventory available historic properties
- **Gateways and Appearance**
 - Enhancements at entry points
 - Appearance Advisory Committee
- **Website Updates**
 - Update Available Sites and Buildings
 - Expand contact information

Hamilton

- **Business Site Development**
 - Explore multi-jurisdictional park arrangement with Williamston, Robersonville, and Martin County
 - Apply due diligence steps to future industrial sites noted on maps
- **Retail / Small Business Development**
 - Work with ElectriCities Retail Recruitment Program and MCC Small Business Center on these opportunities
 - Grocery or general stores
 - Food Services & Drinking Places
 - Expand Building Materials, Garden Equipment & Supply Stores
 - Businesses supporting river recreation

- **Existing Business Support**
 - Regularly contact businesses
 - Town newsletter
 - Include business leaders in town leadership roles
 - Review ElectriCities Key Accounts Program for strategies with key electric customers
- **Marketing**
 - Brand Development
 - Partner with ElectriCities to develop marketing information for the Town
- **Internal Marketing**
 - Newsletter
 - Guest Column
 - Joint Board Meetings
 - Manager Networking
- **Downtown Development**
 - Downtown Building Inventory
 - Downtown Incentives
- **Tourism**
 - Seek grants to further develop river access
 - Capitalize on Rosenwald School and Roanoke River Partners office
 - Further capitalize on Fort Branch by forming partnerships to extend operating hours
 - Amenity development: community center
- **Martin Community College Partnership**
 - Partnership with MCC on developing former Baptist Home
 - Exploration of additional opportunities with Baptist Home
- **Gateways and Appearance**
 - Enhancements at entry points
 - Appearance Advisory Committee
- **Website Updates**
 - Develop Town website

Implementation

The strategic plan outlines a path to enhance Martin County's position as a regional hub for business and tourism. Without implementation, it will remain simply an outline on paper. It will take people, leaders, to put into action the strategies in this outline.

The Steering Committee recommends that its membership be expanded and transformed into an Implementation Committee.

- Purpose will be to oversee implementation of the strategic plan. Initial steps include:
 - Seek endorsement of the strategic plan from the following entities:
 - Towns of Williamston, Robersonville, and Hamilton
 - Martin County
 - Martin County EDC
 - TDA
 - Chamber of Commerce
- Membership: towns, County, EDC, MCC, TDA, and chamber of commerce.
- Quarterly meeting schedule.
- It is recommended that Williamston organize meetings the first year (due to their leadership in the planning process) and establish a leadership structure thereafter.

The Steering Committee identified the following as top priorities for implementation:

Product Development

- Gather information on available sites (short term)
- Explore multi-jurisdictional park (long term)

Retail/Small Bus. Development

- Develop Community College program on retail business opportunities (short term)

Marketing

- Branding (mid-term)
- Website updates (short term)

Downtown

- Develop building inventory (short term)
- Create incentive program (mid-term)

Tourism

- Create destinations (long term)

Gateway improvement

- Identification of grants (long term)

Measuring Success

Communities measure economic development success in different ways. The traditional indicators of success are new taxable investment and job creation. Those indicators are still relevant; however, today other indicators are needed because of the changing focus of economic development from strictly industrial recruitment to retail, small business, tourism, workforce development, and the many other facets that make up a comprehensive economic development program. Reversing trends such as population decline will take years, possibly even decades.

In addition to new jobs and taxable investment, other indicators of success Martin County may want to measure include:

- Population growth
- Income and wages
- Percentage of population below the poverty line
- New business starts
- Graduation rates, Career Readiness Certificates, and other measures of academic achievement
- Retail sales
- Visitors, hotel occupancy, event attendance and other measures of tourism

Appendix A: Economic and Demographic Profile

Population

Martin County's population declined by 4.2% from 2000 to 2010 and is projected to continue to decline to 22,938 by 2015 (ESRI). All towns except for Bear Grass and Hassell show declines in population. The Town of Williamston, the largest town in the County, saw as much population decline as did other towns.

Population

	2000	2010	% Growth
Bear Grass	68	73	7.4%
Everetts	179	164	-8.4%
Hamilton	516	408	-20.9%
Hassell	76	84	10.5%
Jamesville	502	491	-2.2%
Oak City	376	317	-15.7%
Parmelee	290	278	-4.1%
Robersonville	1,731	1,488	-14%
Williamston	5,946	5,511	-7.3%
Martin County	25,591	24,505	-4.2%

NC Office of State Budget and Management

Age Demographics

Martin County's age demographics are older than North Carolina and the Greenville MSA with fewer people in the primary working age groups. The aging trend is expected to continue.

Percent of Population by Age Group

	Martin County			Greenville MSA	North Carolina
Age Groups	2000 % of total population	2010 % of total population	2015 % of total population	2010 % of total population	2010 % of total population
0 – 4	6.2%	6.1%	5.9%	6.5%	6.6%
5 - 9	7.3%	6.4%	6.2%	6.2%	6.5%
10 - 14	7.6%	6.7%	6.8%	6%	6.5%
15 - 19	6.9%	6.7%	6.3%	7.9%	6.8%
20 - 24	5%	5.1%	5.4%	11.4%	6.9%

25 - 34	11.7%	10.8%	10.6%	15.2%	13%
35 - 44	15%	12.5%	11.8%	12.7%	14.3%
45 - 54	14.7%	15.4%	13.6%	13.4%	14.8%
55 - 64	10.3%	14.3%	15.2%	10.4%	11%
65 - 74	8.2%	8.5%	10.3%	5.6%	7%
75 - 84	5.5%	5.4%	5.5%	3.3%	4.1%
85+	1.6%	2.2%	2.2%	1.4%	1.7%

US Census and ESRI

Population by Race & Ethnicity

Martin County is becoming slightly more racially and ethnically diverse with the predominant racial groups being “White Alone” and “Black Alone.” The percentage of all non-white races and ethnicities has been growing. The most significant growth can be seen in the “Hispanic Origin” category.

Population by Race & Ethnicity

Race/Ethnicity	Martin County		
	2000	2010	2015
White Alone	52.5%	52.2%	52.1%
Black Alone	45.4%	44.4%	43.8%
American Indian Alone	0.3%	0.3%	0.4%
Asian or Pacific Islander Alone	0.3%	0.4%	0.5%
Some Other Race Alone	0.9%	1.7%	2.1%
Two or More Races	0.6%	1%	1.2%
Hispanic Origin	2.1%	3.8%	4.8%

US Census and ESRI

Education

Martin County has made significant progress in educational attainment during the 2000 – 2010 period. More citizens are graduating high school and earning college degrees. The number of “associate degree,” “bachelor degree,” and “graduate or professional degree” has all increased. As impressive as the gains are, there is a substantial gap between the County and MSA and the County and North Carolina.

Educational Attainment (% of Population Over Age 25)

	Martin County 2000	Martin County 2010	Greenville MSA 2010	North Carolina 2010
Less than H. S.	29.3%	21.6%	15.5%	15.7%
H. S. graduate	34.6%	36.1%	26.3%	28.7%
Some College No Degree	17.7%	18.6%	20.3%	20.4%
Associate Degree	6.8%	9.3%	9.4%	8.6%
Bachelor Degree	8.3%	9.9%	17.6%	17.5%
Graduate or Professional Degree	3.3%	4.5%	10.8%	9.1%

US Census Bureau, ESRI

SAT scores for the public school system declined between 2008 and 2010. The score is 92% of the state average and 91% of the national average.

SAT Scores

	2008	2009	2010
Martin County	1425	1384	1370
North Carolina	1489	1486	1489
United States	1511	1509	1511

NC Department of Public Instruction

In other measures of the public education system:

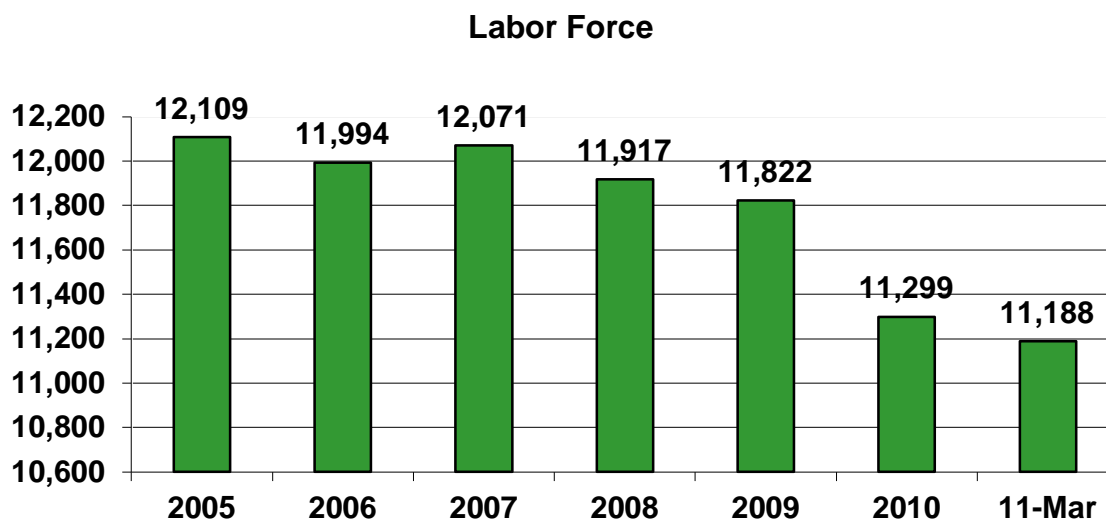
- Two of the eleven schools in Martin County made Adequate Yearly Progress as measured in the No Child Left Behind Law.
- In the North Carolina ABCs assessment:
 - One school is designated as a Honors School of Excellence
 - One school is designated as a School of Excellence
 - Five are designated as Schools of Progress
 - One is designated as a Priority School
 - Three are designated as No Recognition

Labor Force and Unemployment

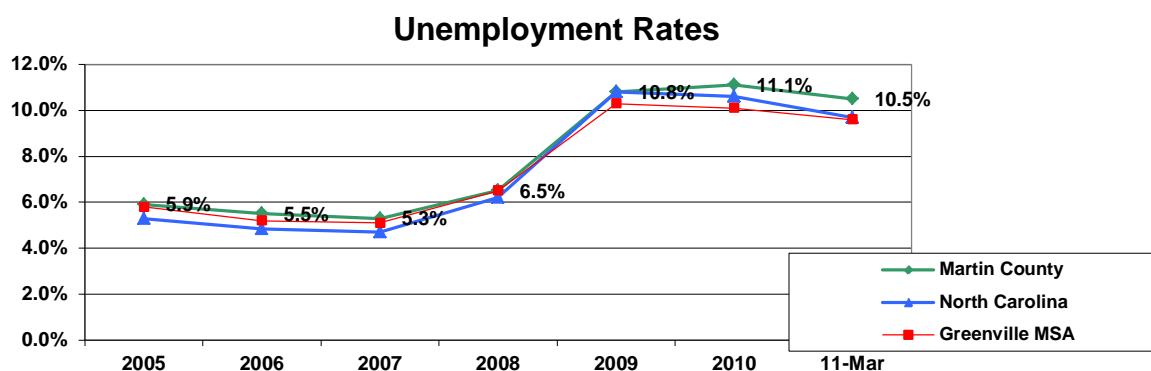
The County, like so many others, has seen the labor force decline since 2000. The aging population, coupled with the recession, has led to a declining labor force. The rate of decline is lessening, and possibly stabilizing as the national economy is rebounding.

The March 2011 labor force, as reported by the NC Employment Security Commission, is 11,188. Reviewing the figures, the labor force declined 7.6% from 2005 to March 2011.

The annualized unemployment rate for Martin County in 2010 was 11.1%. It is currently (March 2011) at 10.5%. Since 2005, the County's unemployment rate has followed the MSA and state trend although slightly higher.



NC Employment Security Commission



NC Employment Security Commission

Announced Permanent Closings and Layoffs

The following business closings and layoffs were reported by the NC Employment Security Commission for 2008 – 2011. The closings were in Williamston, Hamilton, and Robersonville.

Year	Company	Location	Product/Service	Closing/Layoff	Jobs Lost
2008	Lee Tractor	Williamston	Farm Equipment	CL	10
2008	Penco Products	Hamilton	Shelves	LY	59
2009	Down East Apparel	Robersonville	U.S. Navy Work Pants	CL	147
2009	Domtar	Plymouth	Paper	LY	185

NC Employment Security Commission and Martin County EDC

Employment and Wages

In the latest employment figures available, the largest private sector employer is Health Care and Social Assistance at 20% followed by Retail Trade employing 14% of the workforce. Other large private sector employment categories include Manufacturing (13%) and Accommodation and Food Service (12%). The public sector is the largest employer with Federal, State, and Local Government employing 1,558. Manufacturing employment has declined substantially from 2008 to 2010 and stands at 917 compared to 1,978 in 2008. The majority of sectors saw employment decline because the time period spans the last recession.

The leading industry wage sectors in Martin County are Manufacturing, Federal Government, and Finance, Insurance, and Real Estate. Wages grew 1.2% since from 2008 to 2009. The Martin County wage growth rate was higher than wage growth at the state level (0.2%) over the same time period. Wage growth was seen across most sectors.

Martin County Insured Employment and Wages for Select Industries for 2008, 2009, and 3rd Q 2010

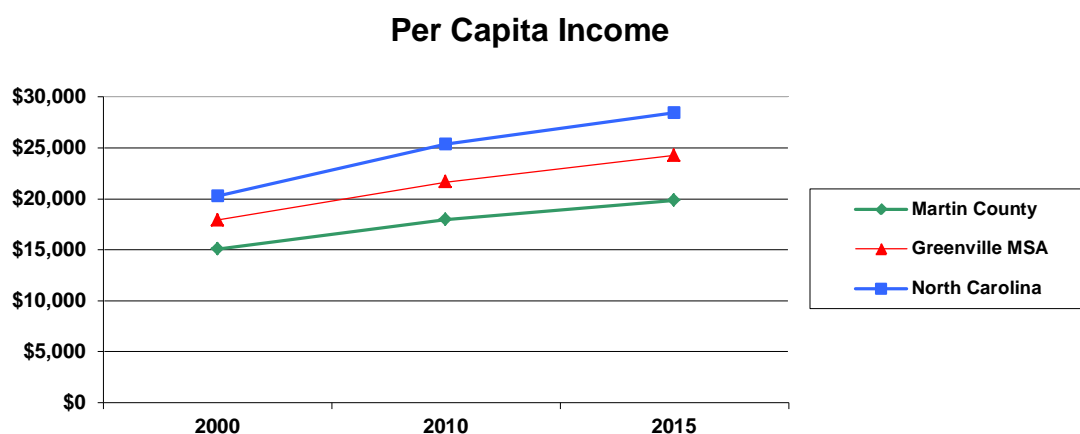
Industry	2008		2009		3 rd Q 2010	
	Annual Avg Empl	Avg Annual Wage Per Employee	Annual Avg Empl	Avg Annual Wage Per Employee	Annual Avg Empl	Avg Weekly Wage Per Employee
Agriculture, Forestry, Fishing & Hunting	276	\$25,081.74	274	\$26,357.97	273	\$516.91
Construction	462	\$29,711.39	367	\$30,854.11	345	\$616.53
Manufacturing	1,978	\$49,130.67	1,687	\$51,777.93	917	\$709.23
Wholesale Trade	162	\$32,380.01	147	\$33,561.25	147	\$665.00
Retail Trade	1,211	\$21,213.06	1,161	\$21,089.38	1,044	\$417.45

Transportation and Warehousing	82	\$33,022.55	79	\$34,196.78	89	\$599.63
Information	61	\$33,146.97	64	\$33,301.02	64	\$675.75
Finance and Insurance	154	\$35,978.99	161	\$35,589.13	169	\$739.81
Real Estate and Rental and Leasing	50	\$17,965.40	38	\$20,693.11	27	\$455.14
Professional and Technical Services	124	\$31,359.40	145	\$28,105.22	105	\$609.20
Administrative and Waste Services	157	\$21,659.89	151	\$21,786.38	143	\$425.80
Educational Services	993	\$31,808.76	1,013	\$30,099.75	792	\$635.23
Health Care and Social Assistance	1,488	\$24,381.61	1,535	\$25,591.25	1,420	\$486.22
Arts, Entertainment, and Recreation	*	*	*	*	19	\$304.60
Accommodation and Food Services	768	\$9,625.69	766	\$9,864.60	861	\$208.44
Other Services, Ex. Public Admin	78	\$19,076.68	70	\$18,704.10	75	\$360.37
Public Administration	775	\$27,246.85	715	\$28,741.33	714	\$539.87
Unclassified	15	\$24,328.40	9	\$29,463.44	*	*
Total Federal Government	57	\$45,448.00	55	\$43,628.00	58	\$758.00
Total State Government	363	\$31,616.00	436	\$32,188.00	458	\$595.00
Total Local Government	1,235	\$30,056.00	1,185	\$30,056.00	1,042	\$591.00
Total Private Industry	7,248	\$30,108.00	6,732	\$30,524.00	5,697	\$496.00
Total All Industries	8,902	\$30,264.00	8,408	\$30,628.00	7,255	\$518.00

NC Employment Security Commission

Per Capita and Median Household Income

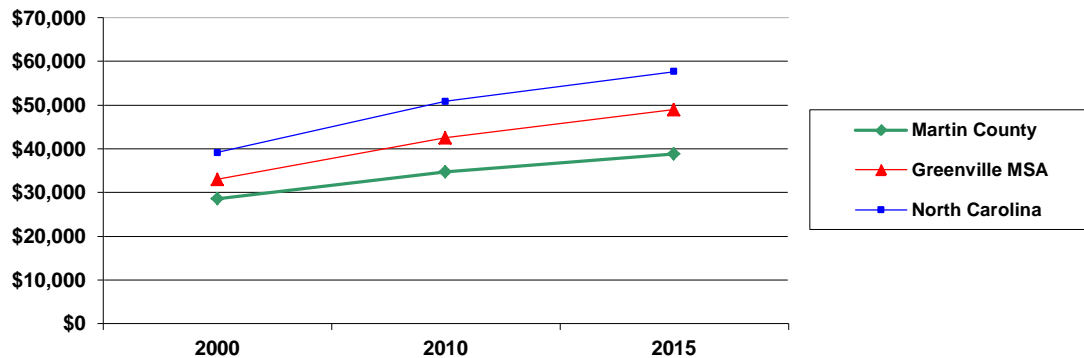
In 2010, per capita income for Martin County was \$17,976, the Greenville MSA was \$21,662, and North Carolina was \$25,349. From 2000 to 2010, Martin County's per capita income decreased from 74% of the state average to 71% of the state average. The graph below shows the widening gap between local and regional per capita income.



US Census Bureau, ESRI

A review of median household income shows a similar trend to per capita income with the county average growing farther from the state average. The graph shows a leveling of income growth projected for 2010 - 2015. The 2010 median household income for the County is \$34,729, \$42,494 for the MSA, and \$50,887 for the state of North Carolina.

Median Household Income



US Census Bureau, ESRI

Poverty

The US Census Bureau reports the Martin Count poverty level at 20.2% in 1999 and at 21.3% in 2009, an increase of 1.1% over 10 years. 2009 was in the midst of the Great Recession, and that, undoubtedly, had some impact on the figure. However, it is concerning that the percent of the population below the national poverty level rose.

Housing

Median Home Value rose 44% over the nine-year period, 2000 to 2010, with a median home now valued at \$88,441. Even with significant growth, Martin County remains a very affordable housing market compared to Greenville and the State. Owner occupied homes make up about 63% of homes while renter occupied homes make up about 24% of homes with a vacancy rate of 13%.

Median Home Value

	2000	2010	2015 Projection
Martin County	\$61,574	\$88,441	\$102,317
Greenville MSA	\$78,688	\$102,691	\$119,577
North Carolina	\$95,839	\$132,772	\$158,638

Source: US Census Bureau, ESRI

Crime

The NC Department of Justice reports crime rates per 100,000 population. Martin County's crime rate is much lower than the state average. After a decline from 2005 to 2007, the crime rate jumped in 2008 but then dropped slightly in 2009.

Index Crime Rates Per 100,000 Population

	2005	2006	2007	2008	2009
Martin County	1,275	852	842	1,171	967
North Carolina	4,622.4	4,654.4	4,659.4	4,581	4,178.4

NC Department of Justice

Taxable Retail Sales

Taxable retail sales figures for Martin County have grown each year from 2006 – 2010, which is remarkable given the recent recession. Retail sales last year were approximately \$168 million. Retail sales figures for Williamston show a decline in 2007-08 but a rebound in 2008-09. There were no figures available for 2009-10 for Williamston. Figures are not gathered by the State for Robersonville and Hamilton.

Taxable Retail Sales in Millions

	2006-07	2007-08	2008-09	2009-10
Martin County	\$136	\$152	\$164	\$168
Williamston	\$99	\$94	\$109	

NC Department of Revenue

Consumer Spending

Consumer spending shows the estimated amount spent on a variety of goods and services by households that reside in Martin County. Expenditures are shown by broad budget categories that are not mutually exclusive.

Martin County 2010 Consumer Spending

Budget Category	Average Annual Household Spending
Apparel & Services	\$1,022.46
Computers & Accessories	\$131.46
Education	\$626.58
Entertainment/Recreation	\$2,199.15
Food at Home	\$3,097.47
Food Away from Home	\$2,070.57
Health Care	\$2,887.49
Household Furnishings & Equipment	\$1,155.08
Investments	\$1,128.04
Retail Goods	\$16,768.33
Shelter	\$8,480.28
TV/Video/Sound Equipment	\$826.32
Travel	\$1,052.61
Vehicle Maintenance & Repairs	\$637.79

ESRI

Appendix B: Retail Leakage

Retail MarketPlace Profile Martin County, NC

Summary Demographics	
2010 Population	23,823
2010 Households	9,566
2010 Median Disposable Income	\$29,028
2010 Per Capita Income	\$17,976

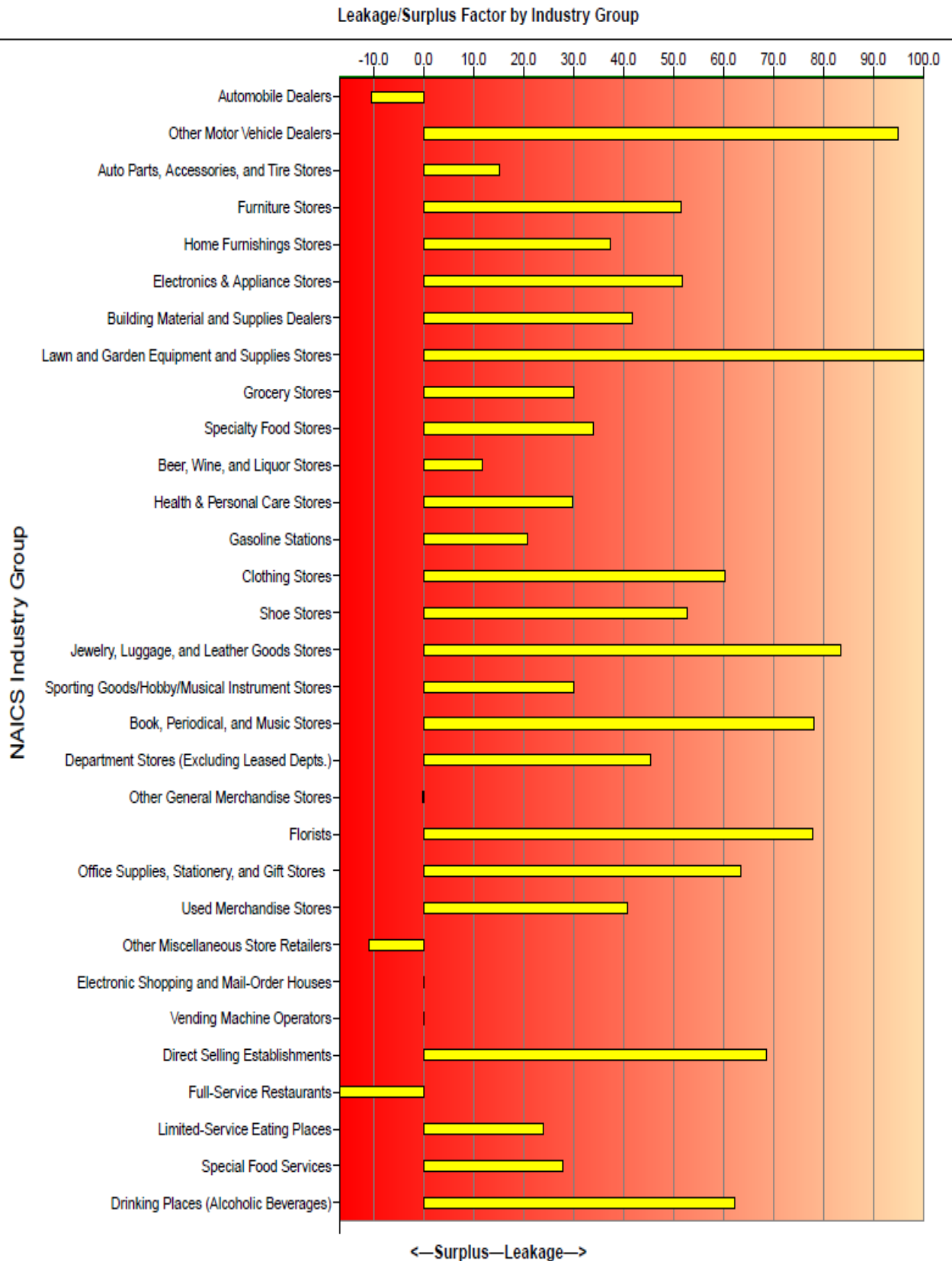
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$179,833,737	\$126,281,907	\$53,551,830	17.5	181
Total Retail Trade (NAICS 44-45)	\$156,008,029	\$107,422,194	\$48,585,835	18.4	136
Total Food & Drink (NAICS 722)	\$23,825,708	\$18,859,713	\$4,965,995	11.6	45
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$39,330,038	\$42,839,090	\$-3,509,052	-4.3	27
Automobile Dealers (NAICS 4411)	\$33,527,245	\$41,302,788	\$-7,775,543	-10.4	15
Other Motor Vehicle Dealers (NAICS 4412)	\$3,855,872	\$99,279	\$3,756,593	95.0	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$1,946,921	\$1,437,023	\$509,898	15.1	11
Furniture & Home Furnishings Stores (NAICS 442)	\$5,402,289	\$1,926,160	\$3,476,129	47.4	6
Furniture Stores (NAICS 4421)	\$3,955,652	\$1,266,216	\$2,689,436	51.5	4
Home Furnishings Stores (NAICS 4422)	\$1,446,637	\$659,944	\$786,693	37.3	2
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$2,382,002	\$755,471	\$1,626,531	51.8	6
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$5,860,649	\$2,110,480	\$3,750,169	47.0	10
Building Material and Supplies Dealers (NAICS 4441)	\$5,160,742	\$2,110,480	\$3,050,262	41.9	10
Lawn and Garden Equipment and Supplies Stores	\$699,907	\$0	\$699,907	100.0	0

(NAICS 4442)					
Food & Beverage Stores (NAICS 445)	\$27,941,676	\$14,993,144	\$12,948,532	30.2	27
Grocery Stores (NAICS 4451)	\$26,931,791	\$14,465,642	\$12,466,149	30.1	19
Specialty Food Stores (NAICS 4452)	\$908,330	\$447,204	\$461,126	34.0	7
Beer, Wine, and Liquor Stores (NAICS 4453)	\$101,555	\$80,298	\$21,257	11.7	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$6,428,871	\$3,469,472	\$2,959,399	29.9	6
Gasoline Stations (NAICS 447/4471)	\$31,616,005	\$20,681,707	\$10,934	20.9	11
Clothing and Clothing Accessories Stores (NAICS 448)	\$4,505,721	\$1,073,195	\$3,432,526	61.5	11
Clothing Stores (NAICS 4481)	\$2,986,258	\$739,866	\$2,246,392	60.3	9
Shoe Stores (NAICS 4482)	\$896,902	\$277,304	\$619,598	52.8	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$622,561	\$56,025	\$566,536	83.5	1
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$868,453	\$239,410	\$629,043	56.8	5
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$320,190	\$172,150	\$148,040	30.1	4
Book, Periodical, and Music Stores (NAICS 4512)	\$548,263	\$67,260	\$481,003	78.1	1
General Merchandise Stores (NAICS 452)	\$27,292,970	\$18,154,660	\$9,138,310	20.1	10
Department Stores Excluding Leased Depts.(NAICS 4521)	\$14,657,235	\$5,487,189	\$9,170,046	45.5	3
Other General Merchandise Stores (NAICS 4529)	\$12,635,735	\$12,667,471	\$-31,736	-0.1	7
Miscellaneous Store Retailers (NAICS 453)	\$2,338,619	\$801,227	\$1,537,392	49.0	16
Florists (NAICS 4531)	\$720,517	\$89,507	\$631,010	77.9	3
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$994,607	\$222,420	\$772,187	63.4	3
Used Merchandise Stores (NAICS 4533)	\$347,588	\$145,748	\$201,840	40.9	4
Other Miscellaneous Store Retailers (NAICS 4539)	\$275,907	\$343,552	\$-67,645	-10.9	6
Nonstore Retailers (NAICS 454)	\$2,040,736	\$378,178	\$1,662,558	68.7	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$0	\$0	\$0	0.0	0

Vending Machine Operators (NAICS 4542)	\$0	\$0	\$0	0.0	0
Direct Selling Establishments (NAICS 4543)	\$2,040,736	\$378,178	\$1,662,558	68.7	1
Food Services & Drinking Places (NAICS 722)	\$23,825,708	\$18,859,713	\$4,965,995	11.6	45
Full-Service Restaurants (NAICS 7221)	\$6,189,523	\$8,684,955	\$-2,495,432	-16.8	32
Limited-Service Eating Places (NAICS 7222)	\$14,662,175	\$9,011,431	\$5,650,744	23.9	10
Special Food Services (NAICS 7223)	\$1,436,305	\$807,412	\$628,893	28.0	2
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$1,537,705	\$355,915	\$1,181,790	62.4	1

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup



Retail MarketPlace Profile Town of Williamston, NC

Summary Demographics	
2010 Population	5,542
2010 Households	2,263
2010 Median Disposable Income	\$26,966
2010 Per Capita Income	\$17,621

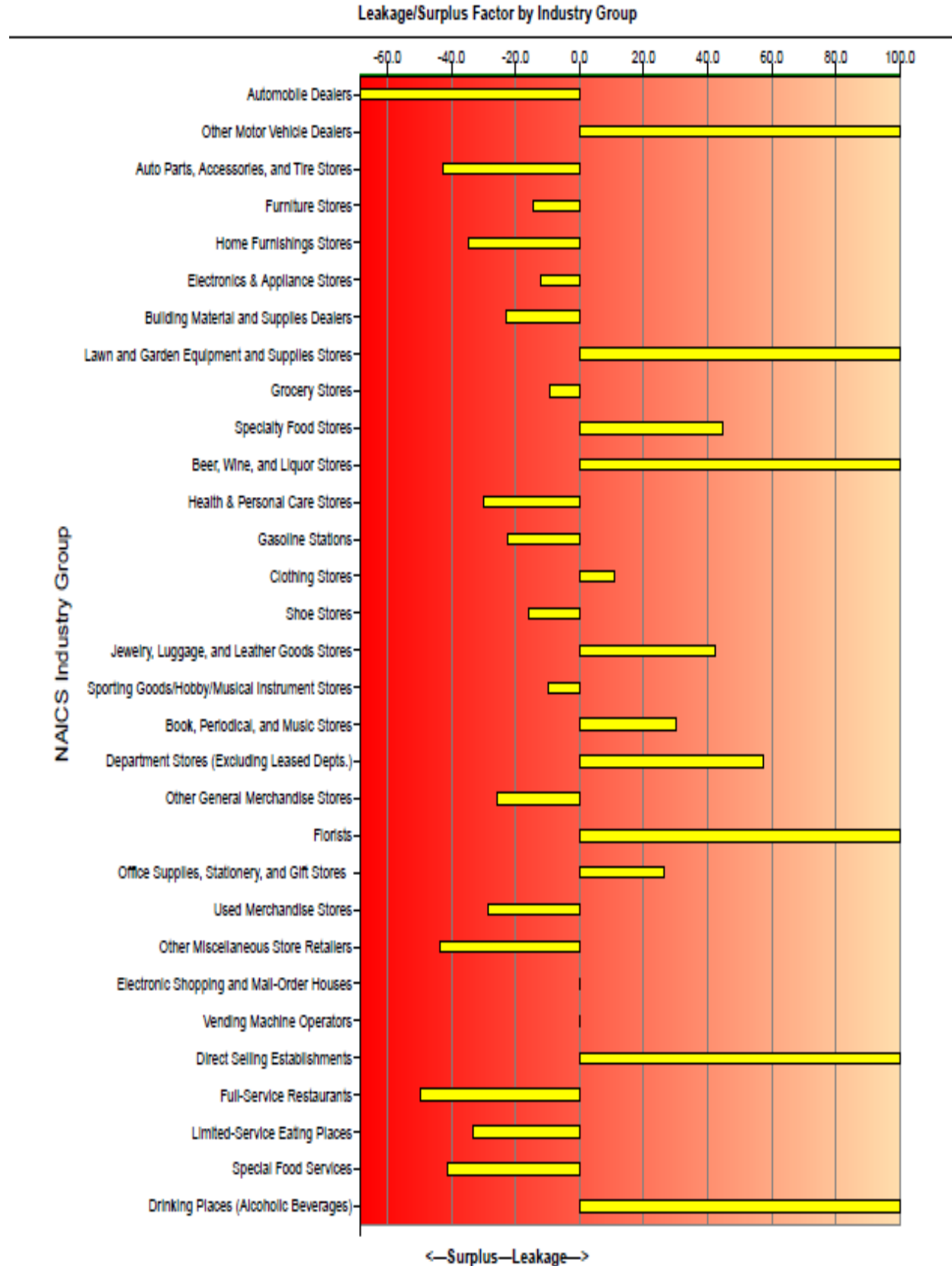
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$40,281,866	\$84,968,068	\$-44,686,202	-35.7	101
Total Retail Trade (NAICS 44-45)	\$34,923,169	\$73,521,437	\$-38,598,268	-35.6	78
Total Food & Drink (NAICS 722)	\$5,358,697	\$11,446,631	\$-6,087,934	-36.2	23
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$8,651,019	\$40,637,116	\$-31,986,097	-64.9	15
Automobile Dealers (NAICS 4411)	\$7,377,813	\$39,541,501	\$-32,163,688	-68.6	9
Other Motor Vehicle Dealers (NAICS 4412)	\$832,898	\$0	\$832,898	100.0	0
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$440,308	\$1,095,615	\$-655,307	-42.7	6
Furniture & Home Furnishings Stores (NAICS 442)	\$1,186,632	\$1,820,641	\$-634,009	-21.1	5
Furniture Stores (NAICS 4421)	\$867,648	\$1,160,697	\$-293,049	-14.4	3
Home Furnishings Stores (NAICS 4422)	\$318,984	\$659,944	\$-340,960	-34.8	2
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$531,638	\$678,194	\$-146,556	-12.1	4
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$1,284,385	\$1,793,783	\$-509,398	-16.5	8
Building Material and Supplies Dealers (NAICS 4441)	\$1,129,816	\$1,793,783	\$-663,967	-22.7	8
Lawn and Garden Equipment and Supplies Stores	\$154,569	\$0	\$154,569	100.0	0

(NAICS 4442)					
Food & Beverage Stores (NAICS 445)	\$6,362,999	\$7,475,043	\$-1,112,044	-8.0	11
Grocery Stores (NAICS 4451)	\$6,132,785	\$7,395,965	\$-1,263,180	-9.3	9
Specialty Food Stores (NAICS 4452)	\$206,807	\$79,078	\$127,729	44.7	2
Beer, Wine, and Liquor Stores (NAICS 4453)	\$23,407	\$0	\$23,407	100.0	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$1,474,902	\$2,725,604	\$-1,250,702	-29.8	5
Gasoline Stations (NAICS 447/4471)	\$7,097,394	\$11,215,141	\$-4,117,747	-22.5	5
Clothing and Clothing Accessories Stores (NAICS 448)	\$1,008,650	\$869,466	\$139,184	7.4	9
Clothing Stores (NAICS 4481)	\$669,726	\$536,137	\$133,589	11.1	7
Shoe Stores (NAICS 4482)	\$200,449	\$277,304	\$-76,855	-16.1	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$138,475	\$56,025	\$82,450	42.4	1
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$195,523	\$153,335	\$42,188	12.1	3
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$70,614	\$86,075	\$-15,461	-9.9	2
Book, Periodical, and Music Stores (NAICS 4512)	\$124,909	\$67,260	\$57,649	30.0	1
General Merchandise Stores (NAICS 452)	\$6,135,923	\$5,723,820	\$412,103	3.5	5
Department Stores Excluding Leased Depts.(NAICS 4521)	\$3,281,720	\$887,150	\$2,394,570	57.4	2
Other General Merchandise Stores (NAICS 4529)	\$2,854,203	\$4,836,670	\$-1,982,467	-25.8	3
Miscellaneous Store Retailers (NAICS 453)	\$522,534	\$429,294	\$93,240	9.8	8
Florists (NAICS 4531)	\$159,079	\$0	\$159,079	100.0	0
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$222,978	\$130,283	\$92,695	26.2	1
Used Merchandise Stores (NAICS 4533)	\$78,366	\$140,548	\$-62,182	-28.4	4
Other Miscellaneous Store Retailers (NAICS 4539)	\$62,111	\$158,463	\$-96,352	-43.7	3
Nonstore Retailers (NAICS 454)	\$471,570	\$0	\$471,570	100.0	0
Electronic Shopping and Mail-Order Houses	\$0	\$0	\$0	0.0	0

(NAICS 4541)					
Vending Machine Operators (NAICS 4542)	\$0	\$0	\$0	0.0	0
Direct Selling Establishments (NAICS 4543)	\$471,570	\$0	\$471,570	100.0	0
Food Services & Drinking Places (NAICS 722)	\$5,358,697	\$11,446,631	\$-6,087,934	-36.2	23
Full-Service Restaurants (NAICS 7221)	\$1,395,937	\$4,131,722	\$-2,735,785	-49.5	15
Limited-Service Eating Places (NAICS 7222)	\$3,287,662	\$6,538,081	\$-3,250,419	-33.1	7
Special Food Services (NAICS 7223)	\$322,165	\$776,828	\$-454,663	-41.4	1
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$352,933	\$0	\$352,933	100.0	0

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup



Retail MarketPlace Profile Town of Hamilton, NC

Summary Demographics	
2010 Population	431
2010 Households	165
2010 Median Disposable Income	\$29,697
2010 Per Capita Income	\$17,869

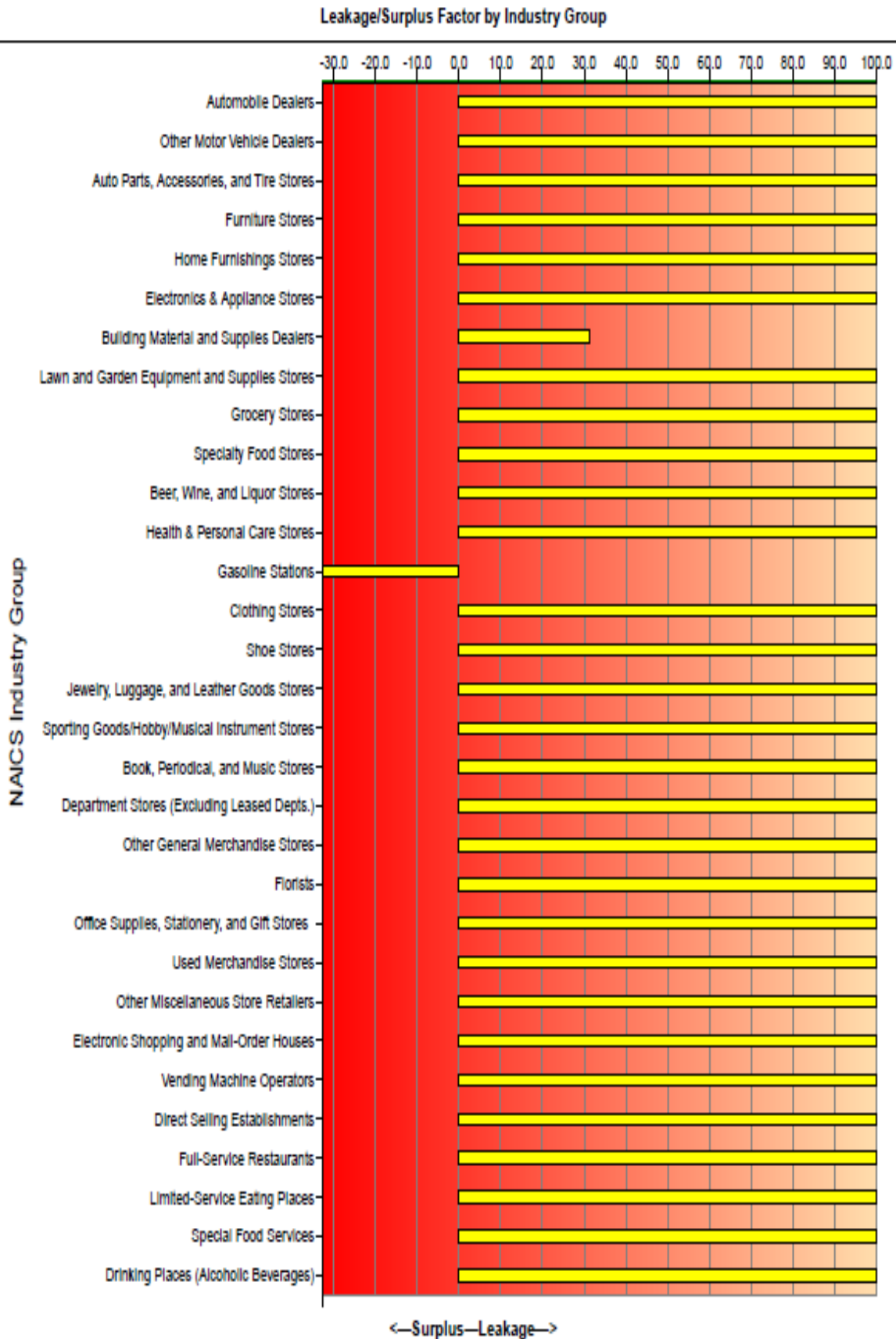
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$3,229,088	\$1,261,297	\$1,967,791	43.8	2
Total Retail Trade (NAICS 44-45)	\$2,824,987	\$1,261,297	\$1,563,690	38.3	2
Total Food & Drink (NAICS 722)	\$404,101	\$0	\$404,101	100.0	0
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$695,538	\$0	\$695,538	100.0	0
Automobile Dealers (NAICS 4411)	\$618,132	\$0	\$618,132	100.0	0
Other Motor Vehicle Dealers (NAICS 4412)	\$40,852	\$0	\$40,852	100.0	0
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$36,554	\$0	\$36,554	100.0	0
Furniture & Home Furnishings Stores (NAICS 442)	\$72,712	\$0	\$72,712	100.0	0
Furniture Stores (NAICS 4421)	\$51,416	\$0	\$51,416	100.0	0
Home Furnishings Stores (NAICS 4422)	\$21,296	\$0	\$21,296	100.0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$61,136	\$0	\$61,136	100.0	0
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$95,334	\$50,099	\$45,235	31.1	1
Building Material and Supplies Dealers (NAICS 4441)	\$95,312	\$50,099	\$45,213	31.1	1

Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$22	\$0	\$22	100.0	0
Food & Beverage Stores (NAICS 445)	\$448,631	\$0	\$448,631	100.0	0
Grocery Stores (NAICS 4451)	\$432,386	\$0	\$432,386	100.0	0
Specialty Food Stores (NAICS 4452)	\$13,441	\$0	\$13,441	100.0	0
Beer, Wine, and Liquor Stores (NAICS 4453)	\$2,804	\$0	\$2,804	100.0	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$121,711	\$0	\$121,711	100.0	0
Gasoline Stations (NAICS 447/4471)	\$613,063	\$1,211,198	\$-598,135	-32.8	1
Clothing and Clothing Accessories Stores (NAICS 448)	\$50,610	\$0	\$50,610	100.0	0
Clothing Stores (NAICS 4481)	\$34,789	\$0	\$34,789	100.0	0
Shoe Stores (NAICS 4482)	\$12,947	\$0	\$12,947	100.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$2,874	\$0	\$2,874	100.0	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$10,763	\$0	\$10,763	100.0	0
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$6,539	\$0	\$6,539	100.0	0
Book, Periodical, and Music Stores (NAICS 4512)	\$4,224	\$0	\$4,224	100.0	0
General Merchandise Stores (NAICS 452)	\$563,282	\$0	\$563,282	100.0	0
Department Stores Excluding Leased Depts.(NAICS 4521)	\$256,768	\$0	\$256,768	100.0	0
Other General Merchandise Stores (NAICS 4529)	\$306,514	\$0	\$306,514	100.0	0
Miscellaneous Store Retailers (NAICS 453)	\$31,782	\$0	\$31,782	100.0	0
Florists (NAICS 4531)	\$1,599	\$0	\$1,599	100.0	0
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$19,315	\$0	\$19,315	100.0	0
Used Merchandise Stores (NAICS 4533)	\$4,302	\$0	\$4,302	100.0	0
Other Miscellaneous Store Retailers (NAICS 4539)	\$6,566	\$0	\$6,566	100.0	0
Nonstore Retailers (NAICS 454)	\$60,425	\$0	\$60,425	100.0	0
Electronic Shopping and Mail-Order Houses	\$550	\$0	\$550	100.0	0

(NAICS 4541)					
Vending Machine Operators (NAICS 4542)	\$4,572	\$0	\$4,572	100.0	0
Direct Selling Establishments (NAICS 4543)	\$55,303	\$0	\$55,303	100.0	0
Food Services & Drinking Places (NAICS 722)	\$404,101	\$0	\$404,101	100.0	0
Full-Service Restaurants (NAICS 7221)	\$182,432	\$0	\$182,432	100.0	0
Limited-Service Eating Places (NAICS 7222)	\$194,311	\$0	\$194,311	100.0	0
Special Food Services (NAICS 7223)	\$16,073	\$0	\$16,073	100.0	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$11,285	\$0	\$11,285	100.0	0

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup



Retail MarketPlace Profile Town of Robersonville, NC

Summary Demographics	
2010 Population	1,512
2010 Households	652
2010 Median Disposable Income	\$23,482
2010 Per Capita Income	\$15,974

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$10,898,218	\$5,210,100	\$5,688,118	35.3	14
Total Retail Trade (NAICS 44-45)	\$9,534,373	\$3,769,248	\$5,765,125	43.3	10
Total Food & Drink (NAICS 722)	\$1,363,845	\$1,440,852	\$-77,007	-2.7	4
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$2,347,453	\$712,861	\$1,634,592	53.4	2
Automobile Dealers (NAICS 4411)	\$2,086,208	\$642,031	\$1,444,177	52.9	1
Other Motor Vehicle Dealers (NAICS 4412)	\$137,876	\$0	\$137,876	100.0	0
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$123,369	\$70,830	\$52,539	27.1	1
Furniture & Home Furnishings Stores (NAICS 442)	\$245,414	\$132,728	\$112,686	29.8	1
Furniture Stores (NAICS 4421)	\$173,535	\$132,728	\$40,807	13.3	1
Home Furnishings Stores (NAICS 4422)	\$71,879	\$0	\$71,879	100.0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$206,336	\$88,391	\$117,945	40.0	1
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$321,754	\$0	\$321,754	100.0	0
Building Material and Supplies Dealers (NAICS 4441)	\$321,680	\$0	\$321,680	100.0	0
Lawn and Garden Equipment and Supplies Stores	\$74	\$0	\$74	100.0	0

(NAICS 4442)					
Food & Beverage Stores (NAICS 445)	\$1,514,137	\$1,383,869	\$130,268	4.5	2
Grocery Stores (NAICS 4451)	\$1,459,312	\$1,249,867	\$209,445	7.7	1
Specialty Food Stores (NAICS 4452)	\$45,363	\$134,002	\$-88,639	-49.4	1
Beer, Wine, and Liquor Stores (NAICS 4453)	\$9,462	\$0	\$9,462	100.0	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$410,774	\$414,200	\$-3,426	-0.4	1
Gasoline Stations (NAICS 447/4471)	\$2,069,100	\$0	\$2,069,100	100.00	0
Clothing and Clothing Accessories Stores (NAICS 448)	\$170,807	\$41,147	\$129,660	61.2	1
Clothing Stores (NAICS 4481)	\$117,414	\$41,147	\$76,267	48.1	1
Shoe Stores (NAICS 4482)	\$43,694	\$0	\$43,694	100.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$9,699	\$0	\$9,699	100.0	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$36,326	\$0	\$36,326	100.0	0
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$22,070	\$0	\$22,070	100.0	0
Book, Periodical, and Music Stores (NAICS 4512)	\$14,256	\$0	\$14,256	100.0	0
General Merchandise Stores (NAICS 452)	\$1,901,079	\$961,053	\$940,026	32.8	1
Department Stores Excluding Leased Depts.(NAICS 4521)	\$866,591	\$0	\$866,591	100.0	0
Other General Merchandise Stores (NAICS 4529)	\$1,034,488	\$961,053	\$73,435	3.7	1
Miscellaneous Store Retailers (NAICS 453)	\$107,262	\$34,999	\$72,263	50.8	1
Florists (NAICS 4531)	\$5,398	\$0	\$5,398	100.0	0
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$65,186	\$0	\$65,186	100.0	0
Used Merchandise Stores (NAICS 4533)	\$14,518	\$0	\$14,518	100.0	0
Other Miscellaneous Store Retailers (NAICS 4539)	\$22,160	\$34,999	\$-12,839	-22.5	1
Nonstore Retailers (NAICS 454)	\$203,931	\$0	\$203,931	100.0	0
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$1,855	\$0	\$1,855	100.0	0

Vending Machine Operators (NAICS 4542)	\$15,429	\$0	\$15,429	100.0	0
Direct Selling Establishments (NAICS 4543)	\$186,647	\$0	\$186,647	100.0	0
Food Services & Drinking Places (NAICS 722)	\$1,363,845	\$1,440,852	\$-77,007	-2.7	4
Full-Service Restaurants (NAICS 7221)	\$615,709	\$1,185,682	\$-569,973	-31.6	3
Limited-Service Eating Places (NAICS 7222)	\$655,802	\$255,170	\$400,632	44.0	1
Special Food Services (NAICS 7223)	\$54,247	\$0	\$54,247	100.0	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$38,087	\$0	\$38,087	100.0	0

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup

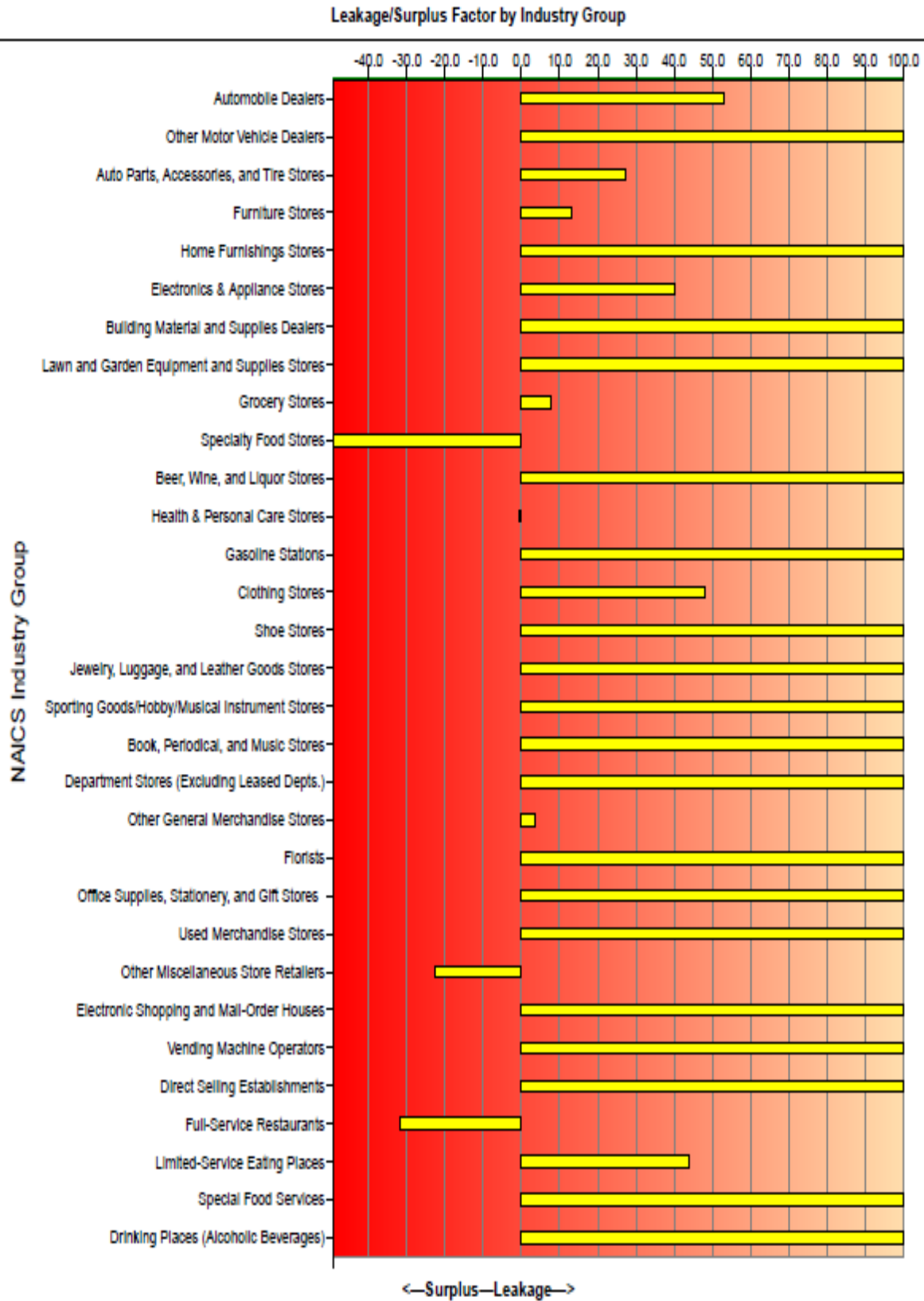


Exhibit A – Williamston - Potential Commercial Development Sites

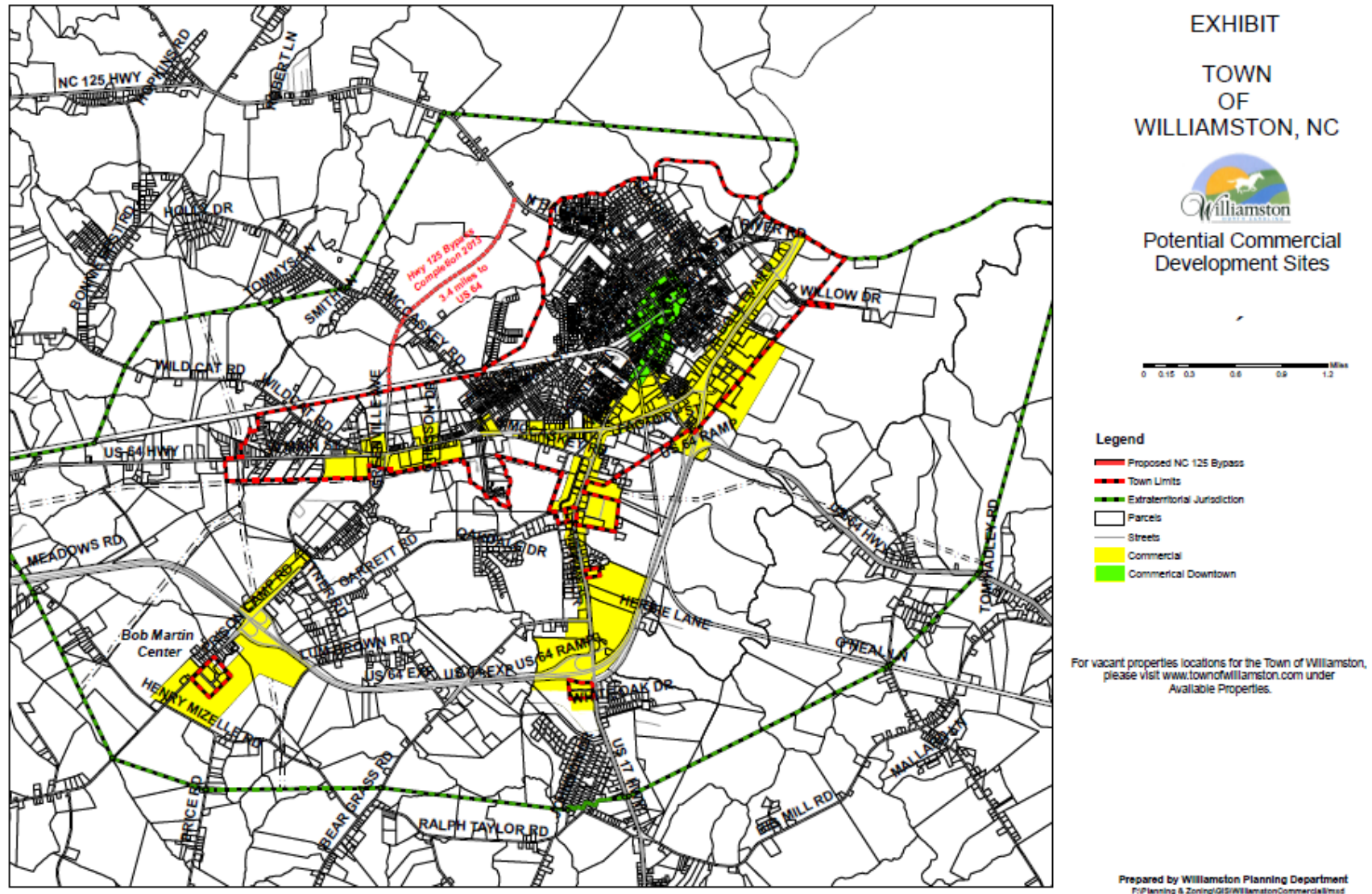


Exhibit B – Williamston - Potential Industrial Development Sites

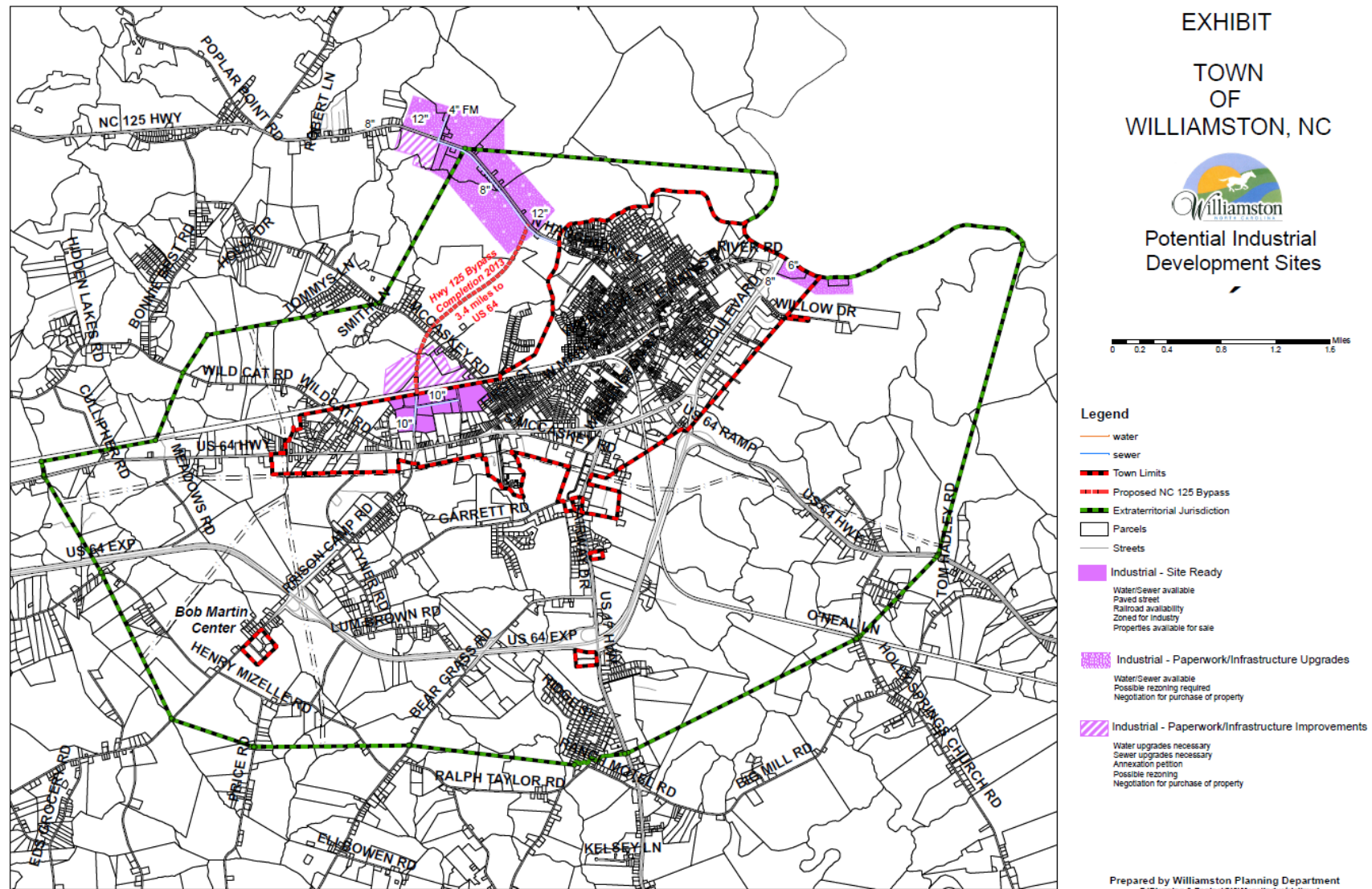


Exhibit C – Robersonville - Potential Commercial Development Sites

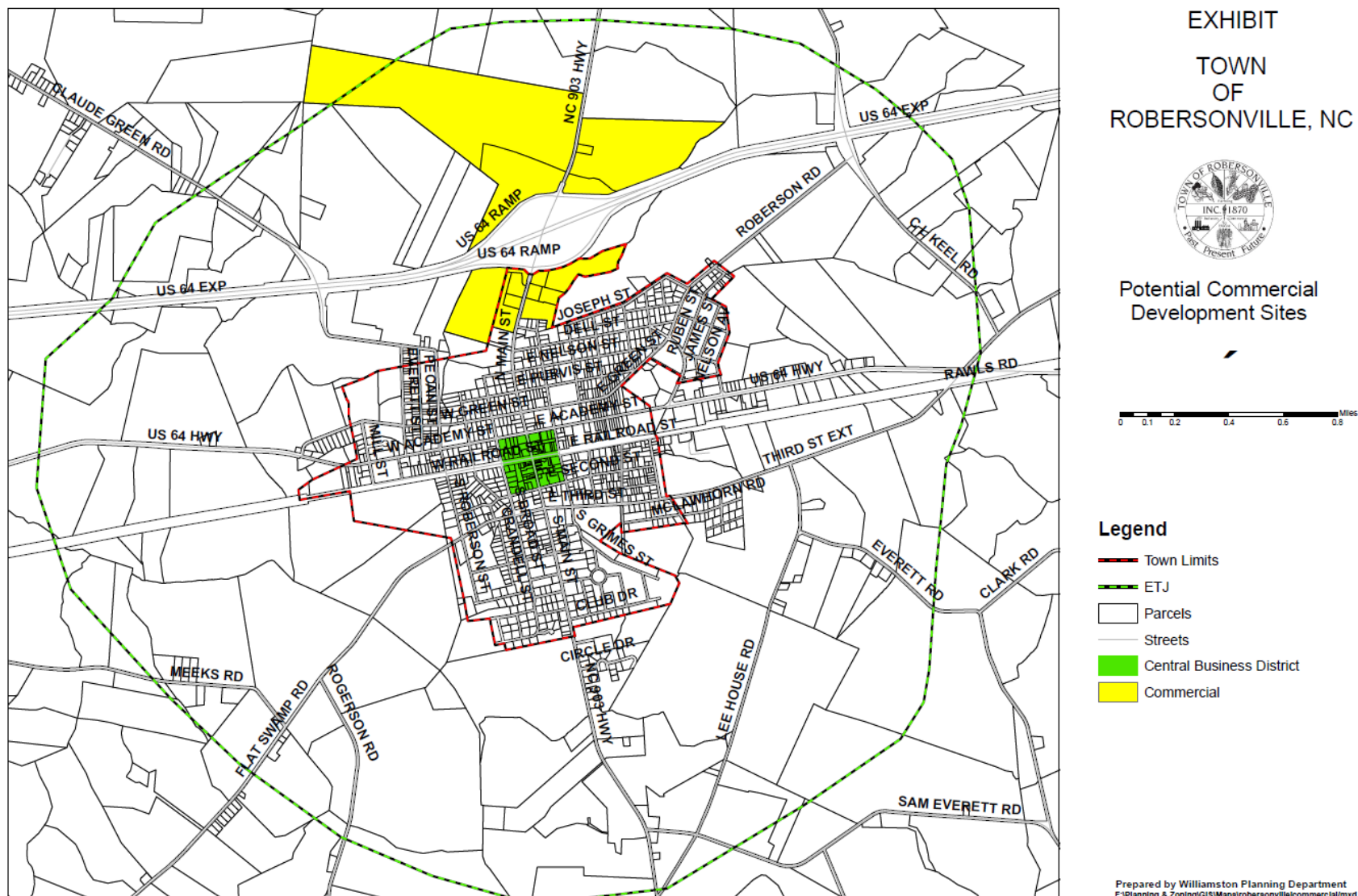


Exhibit E – Hamilton - Potential Commercial Development Sites

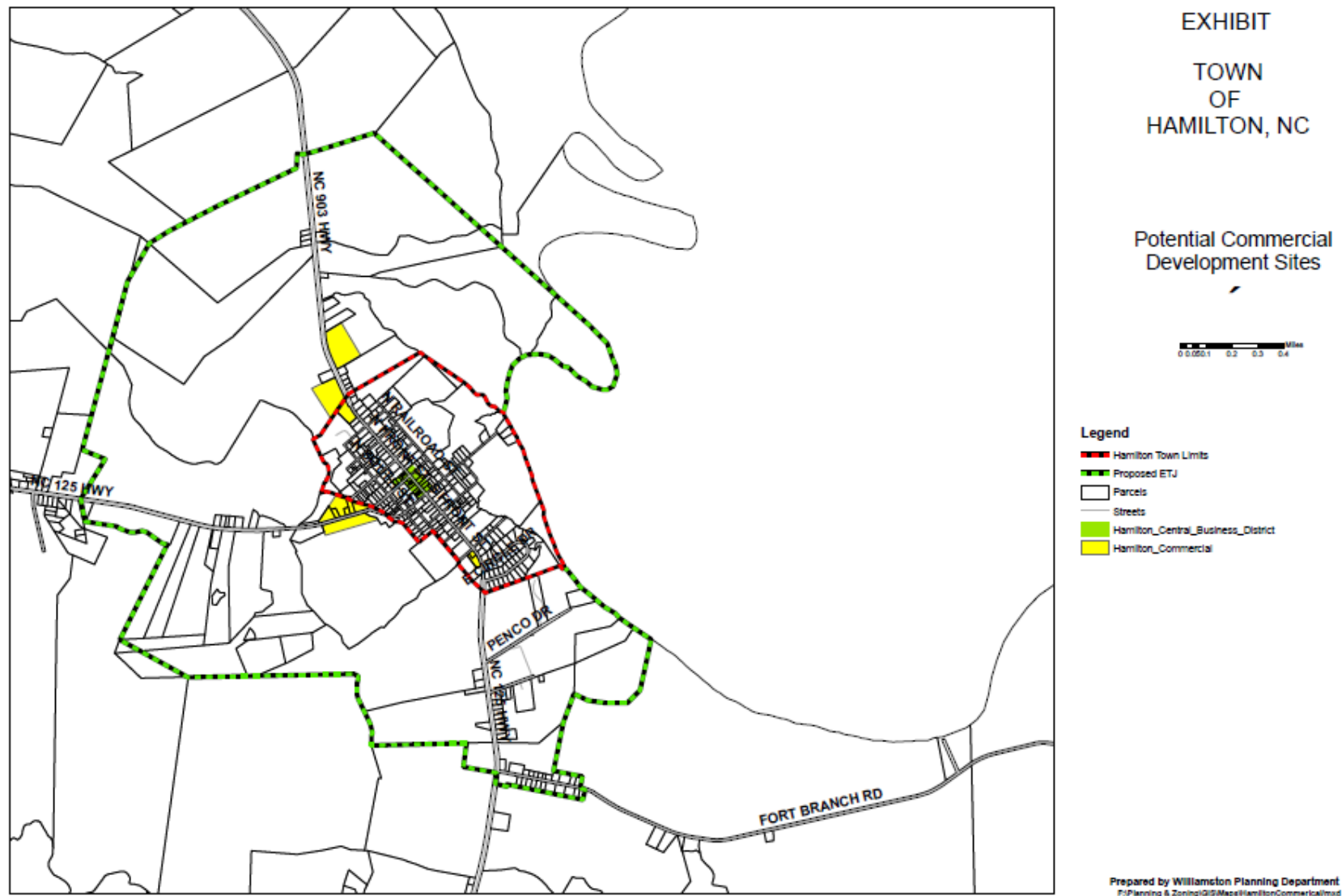
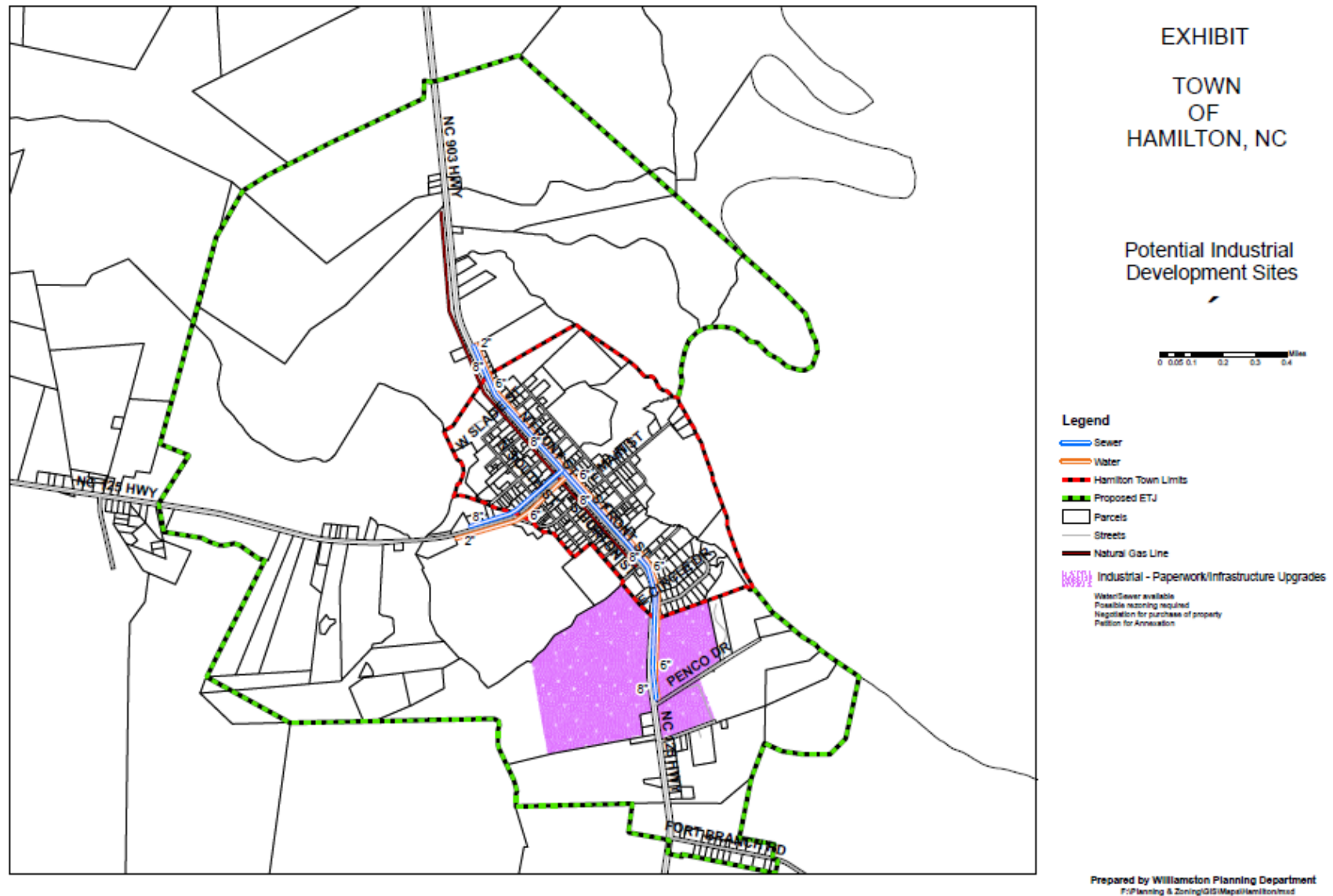


Exhibit F – Hamilton - Potential Industrial Development Sites



Methodology

The Martin County Economic Development Strategic Plan was developed using both quantitative and qualitative research. The notes below describe the planning process used in the development of the plan.

Economic and Demographic Profile and Retail Leakage

Sanford Holshouser used the latest available public data and projections from ESRI to take a snapshot of how the local economy is changing and trends in demographics. All sources are cited in the Economic and Demographic Profile. The analysis of the data was conducted by Sanford Holshouser.

SWOT Analysis

Sanford Holshouser gathered qualitative information from a diverse group of Martin County leaders. The Town of Williamston established a Steering Committee made up of about ten local officials including representation from Williamston, Robersonville, Hamilton, Martin Community College, Martin County EDC, and other organizations. Two community meetings were held in Williamston with about 20 participants in each. Interviews were conducted with local leaders and people outside Martin County who are involved in economic development efforts. Small group meetings were held in Robersonville and Hamilton. An online survey gathered responses from 17 people. In all, more than 80 citizens had input into the planning process.

Strategies and Actions

Sanford Holshouser developed preliminary strategies and actions based on the SWOT Analysis review of previous studies, economic and demographic data, and best practices in economic development. Draft strategies were reviewed and discussed by the Steering Committee.

Implementation Plan

The implementation plan is a guide designed to focus resources on priority action items. Priorities were developed during a strategic planning session with the Steering Committee. We understand that economic development resources are limited, and the implementation guide will help target those limited resources.

Sanford Holshouser Economic Development

Consulting is an innovative and growing economic development consulting firm that provides site selection services, action planning, and unique, sustainable strategies to communities, organizations, and companies. Sanford Holshouser continues the visionary economic development ideas of the firm's founders, former US Senator and North Carolina Governor Terry Sanford (deceased) and former Governor James Holshouser, Jr. who is still active in the firm. The consulting firm is affiliated with Nexsen Pruet law firm, a leader in economic development law and public policy in the Carolinas. Ernie Pearson, a partner in Sanford Holshouser and an attorney with Nexsen Pruet, has been recognized by *Southern Business Magazine* as one of the top economic development attorneys in the 17 Southern states.



**Your Partner for Sustainable
Economic Prosperity.**

SITE SELECTION DIVISION

Sanford Holshouser's Site Selection Division works with corporate clients to site new facilities and expansions, analyze workforce characteristics, negotiate incentives, and work through the many tasks involved in locating a new or expanded facility. We have also represented communities in the site selection process assisting with incentive negotiations and return on investment analysis. Our partners have site selection experience as consultants and as local, regional, and state level economic developers. Having both sets of experience gives us a unique perspective in site selection.

ECONOMIC DEVELOPMENT PLANNING DIVISION

Since its founding in 1999, Sanford Holshouser has provided consulting services to more than 80 communities in South Carolina, North Carolina, Virginia, Florida, and Minnesota. Projects have included strategic planning and action planning for economic development, product development, competitive analysis, site certification, board development, organizational development, and coalition building for EDOs. We have worked for small towns, rural counties, high-tech large cities, and urban regions.

PUBLIC POLICY DIVISION

The firm's Public Policy Division has completed projects such as the NC Motorsports Study which quantified the economic impact of the industry on the state's economy and formed state-level policy recommendations to retain and grow the industry. Sanford Holshouser partnered with UNC-Charlotte Urban Institute on the motorsports project. A similar study was recently completed for North Carolina's equine industry. Commissioned by the NC General Assembly, the equine study was done in partnership with NC State, East Carolina, and Western Carolina Universities.