

**NORTH CAROLINA
COUNTY TRADE PULL FACTORS
FOR SOUTHEAST NORTH CAROLINA
FY 05-06 to FY 14-15**

CTPF Report #2

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OVERVIEW

In North Carolina, as in most states, metropolitan centers are the main economic drivers and generators of sales tax revenue. Studying sales tax revenue is one way county planners and elected officials can identify economic trends in business activity in a county or in a region. While sales tax revenue does not represent all of the taxes collected by a county, they are indicators of consumer spending in a region and the mobility of that spending. Sales tax revenues also help identify the type of business activities generating the most consumable goods and services.

This report is a follow up to CTPF Report #1: North Carolina County Trade Pull Factors, Trade Area Capture and Percent Market Share Analysis FY 05-06 to FY 14-15, Report #1. This report focuses on the economic pull of the counties in southeast NC. The 18 counties in this district are analyzed in this manner based on the five districts of North Carolina as established by NC Cooperative Extension: Southeast, Northeast, North Central, South Central and West.

In this report, county trade pull factors (CTPF) are calculated on a state and district level to compare and contrast how much pull individual urban areas have within a district in contrast to how much pull they have on a state level. On average the CTPFs for each county are higher within a district compared to across the state, because of the narrower focus. This is important because it highlights the influence cities like Wilmington (New Hanover County) have on southeast North Carolina in contrast to the relatively small impact it has on the state level in comparison to cities like Charlotte or the Raleigh/Durham corridor.

In addition to district level CTPF calculations, this report evaluates each county's trade area capture (TAC) and percent market share (%MS) for each county within each district. The TAC calculation shows how much equivalent spending power a county has based on how much business it is pulling in from nearby counties or how much its spending power is reduced because of people going outside the county for goods and services.

The Percent market share is a measurement of the amount of county sales tax revenue generated per capita (TAC_{County}) divided by the total state sales tax revenue generated per capita (TAC_{State}). A comparison of all of these factors offers a clearer picture of the economic activity happening in each district in NC.

The economic assessment tools used in this report were used extensively by Dr. David Darling at Kansas State University and continue to be used by the Kansas Department of Revenue to assess the economic impact on sectors of the economy in the State of Kansas. This report utilizes the same assessment methods implemented in Kansas to analyze counties in North Carolina in a similar manner. City and business sector evaluations can also be generated but that data is not included in this report.

SOUTHEAST NORTH CAROLINA

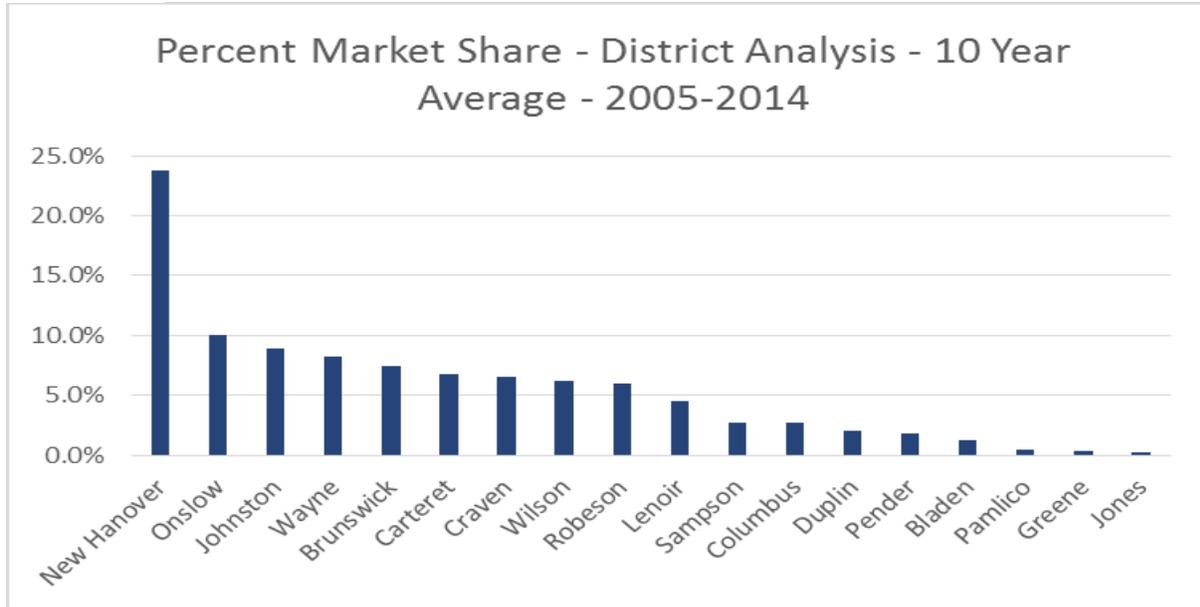
Economic Drivers

Population. As seen in CTPF Report #1 from May 2016, large metropolitan areas with populations greater than 50,000 are significant economic drivers. At the state level the data clearly show that counties with large urban population centers generate the most sales tax revenue and have the most economic pull. This report looks at the impact these urban areas have at a regional level, in this case 18 counties in southeast NC.

In southeast NC two large urban centers – Wilmington and Jacksonville – generate most of the sales tax revenue. Figure 1 shows the average Percent Market Share (%MS) for the last 10 years in the 18 counties of southeast NC. Nine of the 18 counties in the district drive nearly 80% of the region's business.

Wilmington’s, Jacksonville’s and Goldsboro’s retail and restaurant industries, combined with their large population, military spending and tourism (New Hanover), create more than 45% of the region’s sales tax generating business activity.

Figure 1.



Transportation. Access to a four lane interstate or highway has a significant impact on a region. In southeast major highway access also influences the region. I-40, I-95, I-795, US-74 US-64, US-264, US-17 and Hwy 70 traverse many counties influencing sales tax revenue generation. Portions of Hwy 11, Hwy 421 and Hwy 701 are also four lane highways that carry a significant amount of traffic and commerce through the region. Johnston County on the north end of the I-40 corridor carries 38,000 vehicles per day with 40,000 passing over the I-40 and I-95 intersection. An additional 20,000 per day travel US-70 through Johnston County with similar traffic flow into Lenoir and Carteret County. The US 74 corridor on the South Carolina border counties carries 14,000 vehicles per day and Hwy 17 carries 13,000 vehicles in rural areas with 35,000 to 42,000 vehicles moving through Wilmington, Jacksonville and New Bern. Hwy 17 through Brunswick County carries 23,000 vehicles. All of this traffic generates sales tax through gasoline and food purchases.

Natural Resources. Four counties: Brunswick, Carteret, New Hanover, Onslow and Pender have beach frontage on the Atlantic Ocean, which is a major driver of tourism revenue and sales tax. A fifth county in the region, Pamlico County is a coastal county but direct access to the ocean is cut off by the southern outer banks. Pamlico County’s water front does attract tourism with much of it involved in church camps on the water. Golf courses in Pender, New Hanover and Brunswick County also generate a significant amount of recreational spending.

| County | Agriculture / (Rank in 2015) | Military | Urban or Adjacent to Urban County | Recreation: Beaches/Tourism /State Parks | Four lane highway access |
|----------------|---------------------------------|----------|---|--|--------------------------------|
| Bladen | X (6) | | | X | |
| Brunswick | X (60) | | | X | X |
| Carteret | X (79) | X | | X | X |
| Columbus | X (22) | | | | X |
| Craven | X (52) | X | | | X |
| Duplin | X (2) | | | | X |
| Greene | X (9) | | | | |
| Johnston | X (8) | | X | | X |
| Jones | X (29) | | | | |
| Lenoir | X (14) | | | | X |
| New Hanover | X (95) | | X | X | X |
| Onslow | X (30) | X | | | X |
| Pamlico | X (76) | | | | |
| Pender | X (20) | | X | X | X |
| Robeson | X (5) | | X | | X |
| Sampson | X (1) | | | | X |
| Wayne | X (4) | | X | | X |
| Wilson | X (23) | | X | | X |

Military. Onslow County is home to Camp LeJeune USMC and New River Air Station, Craven County is home to Cherry Point Marine Corp Air Station. Jones County has the Oak Grove Landing field training station but there is not a large number of permanent troops based in Jones County. All of these counties are significantly impacted by the presence of troops and the spending power they bring to the region.

Agriculture. Agriculture is the dominant industry in all counties of southeast NC with the exception of New Hanover. Eleven of the eighteen counties rank in the top 25 in the state in agricultural production. Sampson and Duplin County are the #1 and #2 top agriculture revenue generating counties in NC with more than \$1 billion in annual sales. While these are large agriculture producing counties, the output from this industry only generates sales tax in the form of equipment sales, food and restaurant trade. Because of this large agriculture counties are largely dependent on property tax revenue to provide infrastructure. Pork and poultry production dominate the industry with corn, soybeans, sweet potatoes, blueberries and nursery crops generating significant income across the region.

All of these factors and more influence the CTPFs for the region except agriculture. Agriculture generates revenue for families in these counties, which indirectly translates into sales tax but the influence of this production is offset in a CTPF calculation as county population is factored in. Figures 2 and 3 demonstrate the scale of the agriculture industry in the southeast district relative to tourism and forestry. While agriculture is a major driver of the economy of the region and its products generate jobs and wealth, the sale of agriculture products generates little in terms of sales tax revenue that can be directly and visibly connected back to agriculture. The forestry data in Figures 2 and 3 also highlight the underutilization of the region’s timber resources. In Pender County, NC timber sales generate \$14-\$15 million annually. With more than 426,000 acres of timberland, 348,000 of this privately owned, timber sales generate less than \$43 per acre in revenue just on the privately owned property.

Figure 2.

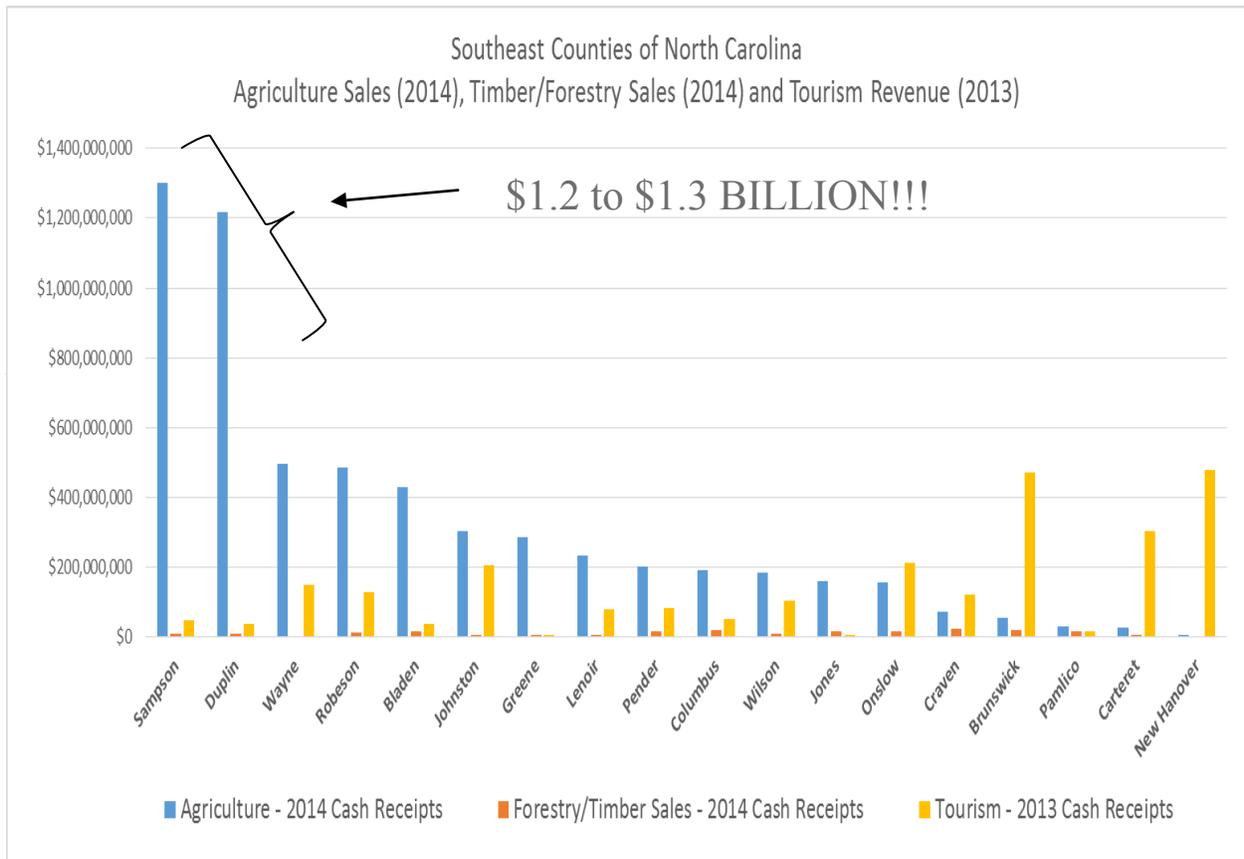
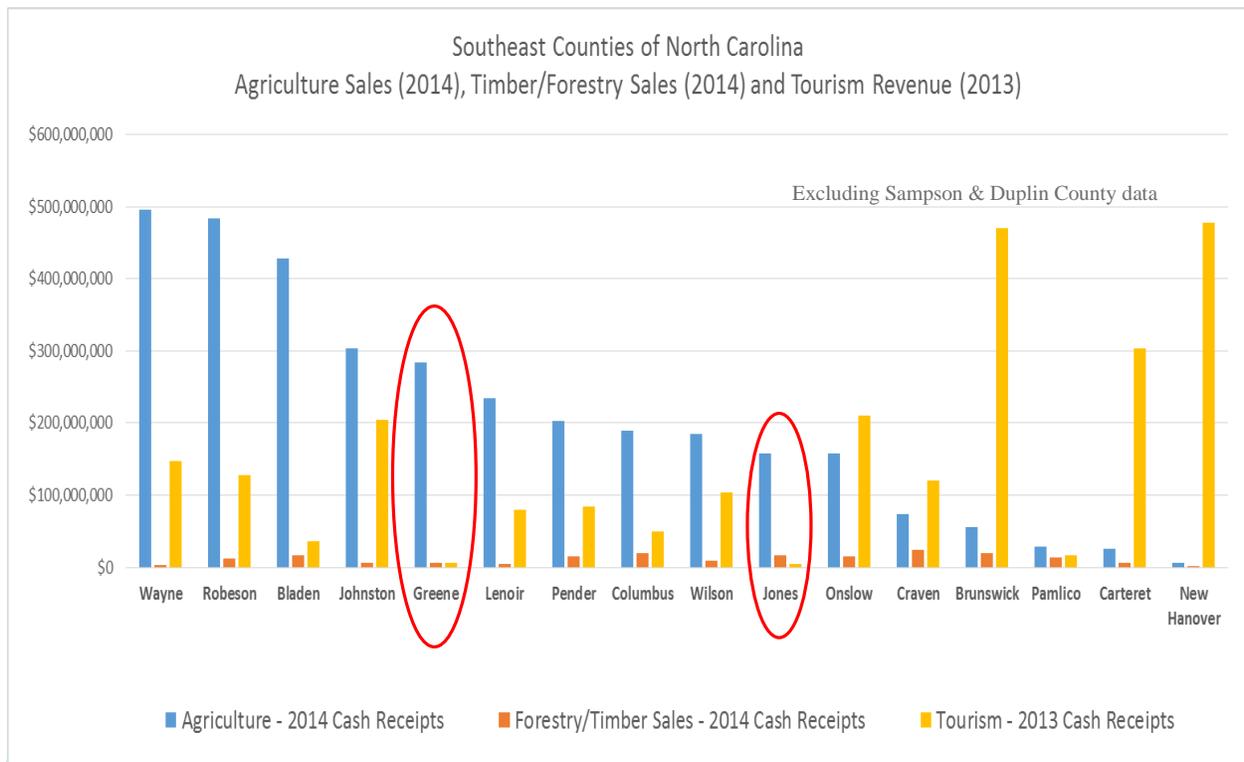


Figure 3.



| County | CTPF – 05-06 | CTPF –06-07 | CTPF – 07-08 | CTPF – 08-09 | CTPF – 09-10 | CTPF – 10-11 | CTPF – 11-12 | CTPF – 12-13 | CTPF – 13-14 | CTPF – 14-15 |
|-------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bladen | 0.40 | 0.36 | 0.34 | 0.37 | 0.49 | 0.50 | 0.50 | 0.51 | 0.50 | 0.48 |
| Brunswick | 1.01 | 1.00 | 0.97 | 0.98 | 0.97 | 0.98 | 0.97 | 0.99 | 1.01 | 1.01 |
| Carteret | 1.31 | 1.29 | 1.30 | 1.35 | 1.32 | 1.29 | 1.30 | 1.24 | 1.25 | 1.24 |
| Columbus | 0.57 | 0.56 | 0.56 | 0.60 | 0.58 | 0.57 | 0.55 | 0.56 | 0.56 | 0.52 |
| Craven | 0.81 | 0.80 | 0.79 | 0.89 | 0.90 | 0.84 | 0.85 | 0.81 | 0.78 | 0.77 |
| Duplin | 0.45 | 0.43 | 0.42 | 0.47 | 0.51 | 0.52 | 0.52 | 0.54 | 0.53 | 0.50 |
| Greene | 0.20 | 0.21 | 0.20 | 0.20 | 0.25 | 0.25 | 0.27 | 0.25 | 0.26 | 0.25 |
| Johnston | 0.75 | 0.75 | 0.72 | 0.71 | 0.74 | 0.73 | 0.71 | 0.72 | 0.71 | 0.71 |
| Jones | 0.26 | 0.25 | 0.24 | 0.26 | 0.32 | 0.31 | 0.31 | 0.27 | 0.27 | 0.24 |
| Lenoir | 0.86 | 0.81 | 0.83 | 0.85 | 0.85 | 0.83 | 0.83 | 0.79 | 0.78 | 0.72 |
| New Hanover | 1.59 | 1.55 | 1.49 | 1.44 | 1.42 | 1.49 | 1.54 | 1.53 | 1.51 | 1.53 |
| Onslow | 0.74 | 0.74 | 0.74 | 0.82 | 0.91 | 0.93 | 0.98 | 0.97 | 0.91 | 0.86 |
| Pamlico | 0.42 | 0.38 | 0.47 | 0.53 | 0.50 | 0.55 | 0.49 | 0.49 | 0.51 | 0.51 |
| Pender | 0.52 | 0.51 | 0.50 | 0.48 | 0.51 | 0.54 | 0.54 | 0.54 | 0.54 | 0.56 |
| Robeson | 0.52 | 0.55 | 0.53 | 0.59 | 0.62 | 0.62 | 0.63 | 0.62 | 0.61 | 0.61 |
| Sampson | 0.53 | 0.51 | 0.48 | 0.49 | 0.58 | 0.59 | 0.59 | 0.57 | 0.57 | 0.57 |
| Wayne | 0.82 | 0.82 | 0.81 | 0.88 | 0.77 | 0.78 | 0.83 | 0.77 | 0.74 | 0.74 |
| Wilson | 0.86 | 0.95 | 1.01 | 0.98 | 1.02 | 0.97 | 0.95 | 0.97 | 0.93 | 0.90 |

In contrast, even with Hwy 17 traversing the east side of Jones County, its CTPF is very small. This is because there are only three incorporated towns in the county, all with populations less than 1,000. There are few restaurants and only two grocery stores in the county and residents are pulled to nearby New Bern, Jacksonville, Kinston and in some instances Richlands for shopping and dining.

PERCENT MARKET SHARE – State Level Analyses

The Percent Market Share (%MS) is a view of the economic impact of the county when adjusting for total population. It is a multi-step calculation taking into account county population by the CTPF to generate the county trade area capture (TAC). This accounts for the fact that as population grows, the demand for services grow and consumer spending for taxable services will grow proportionately. %MS is then calculated by taking the county’s TAC and dividing it by the district or state TAC. The %MS is then calculated by taking each county’s TAC and dividing it by the state TAC.

The importance of calculating %MS versus just calculating a county's total sales tax revenue and dividing it by the state total, is that %MS factors in the spending power, or lack thereof, of counties with large and small populations. As such counties with large populations will capture a disproportionate amount of revenue relative to neighboring counties with lower populations and spending power. The %MS calculation takes this into account. In southeast NC New Hanover County's relatively large CTPF of 1.53 in FY 14-15 is driven in part by the county's large population but also by the beaches generating tourism revenue. This is in stark contrast to Jones or Greene County's CTPFs of 0.24 and 0.25 where small populations and few retail outlets in either county limit the amount of spending and spending opportunities in those counties.

| County | % MS – 05-06 | % MS – 06-07 | % MS – 07-08 | % MS – 08-09 | % MS – 09-10 | % MS – 10-11 | % MS – 11-12 | % MS – 12-13 | % MS – 13-14 | % MS – 14-15 |
|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| New Hanover | 3.37% | 3.31% | 3.18% | 3.06% | 3.02% | 3.17% | 3.30% | 3.30% | 3.28% | 3.33% |
| Onslow | 1.36% | 1.37% | 1.37% | 1.54% | 1.75% | 1.82% | 1.89% | 1.90% | 1.79% | 1.66% |
| Johnston | 1.25% | 1.25% | 1.22% | 1.22% | 1.30% | 1.29% | 1.28% | 1.29% | 1.28% | 1.28% |
| Brunswick | 1.02% | 1.06% | 1.06% | 1.08% | 1.08% | 1.10% | 1.11% | 1.15% | 1.18% | 1.19% |
| Wayne | 1.11% | 1.09% | 1.06% | 1.13% | 1.00% | 1.00% | 1.06% | 0.99% | 0.95% | 0.93% |
| Carteret | 0.95% | 0.93% | 0.92% | 0.94% | 0.92% | 0.90% | 0.91% | 0.87% | 0.88% | 0.87% |
| Robeson | 0.77% | 0.80% | 0.76% | 0.84% | 0.87% | 0.87% | 0.87% | 0.85% | 0.83% | 0.82% |
| Craven | 0.90% | 0.87% | 0.85% | 0.96% | 0.97% | 0.91% | 0.92% | 0.87% | 0.83% | 0.81% |
| Wilson | 0.76% | 0.83% | 0.87% | 0.84% | 0.87% | 0.82% | 0.80% | 0.81% | 0.77% | 0.74% |
| Lenoir | 0.58% | 0.54% | 0.54% | 0.55% | 0.54% | 0.52% | 0.51% | 0.48% | 0.47% | 0.43% |
| Sampson | 0.38% | 0.35% | 0.33% | 0.33% | 0.39% | 0.39% | 0.39% | 0.37% | 0.37% | 0.37% |
| Pender | 0.27% | 0.27% | 0.27% | 0.26% | 0.28% | 0.29% | 0.30% | 0.30% | 0.30% | 0.32% |
| Columbus | 0.36% | 0.35% | 0.34% | 0.36% | 0.35% | 0.34% | 0.33% | 0.34% | 0.33% | 0.30% |
| Duplin | 0.28% | 0.26% | 0.26% | 0.29% | 0.31% | 0.32% | 0.32% | 0.33% | 0.32% | 0.30% |
| Bladen | 0.16% | 0.14% | 0.13% | 0.14% | 0.18% | 0.18% | 0.18% | 0.18% | 0.18% | 0.17% |
| Pamlico | 0.06% | 0.06% | 0.07% | 0.08% | 0.07% | 0.08% | 0.07% | 0.07% | 0.07% | 0.07% |
| Greene | 0.05% | 0.05% | 0.05% | 0.05% | 0.06% | 0.06% | 0.06% | 0.05% | 0.05% | 0.05% |
| Jones | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% | 0.03% |

Table 2 shows the %MS based on the county's CTPF when compared to all counties in NC and its total population's spending capacity for each county compared to the rest of the state. Johnston County captures the region's largest market share (%MS). The combination of beaches, population and retail sales drives these factors in New Hanover County. Onslow and Johnston County's %MS are second and third with military spending, agriculture revenue, access to four lane highways and large populations contributing to their ability to capture business. Johnston County's proximity to Wake County (Raleigh) and the crossroads of I-40 and I-95 result in it having the highest %MS of any county in southeast NC. Craven's population of nearly 100,000 people combined with the influx of money by the US Marine Corp keeps it comparable to that of New Hanover County.

There are many other micro and macroeconomic influences affecting population that are not discussed in this paper but all have an influence on annual spending in every county in North Carolina.

SOUTHEAST DISTRICT COMPARISONS

As will all economic impact analyses, data analysis at multiple levels can be done with enough time and resources. While state level assessments of CTPFs show how counties compare to one another across the state, they also identify the influence large urban centers have as discussed earlier. What they do not show is how counties within regions perform in contrast to neighboring counties. This section of this report attempts to capture some of the local influences for southeast NC.

Table 3 highlights the %MS for counties in southeast counties when compared as a region rather than against all 100 counties in NC. In the southeast district, two counties' economies drive the region. New Hanover County captures 22%-24% of the region's market share with Onslow County between 8.5% and 12.5%. Four other counties: Brunswick, Carteret, Johnston and Wayne capture between 6% and 9% of the region's business.

While tourism is a huge economic driver for New Hanover County, similar impacts could be expected in Carteret, Onslow, Pender and Brunswick County. Brunswick County's %MS shows it captures a fairly large percentage of the region's economy. It also shows how resilient the county's economy is because of tourism spending. While Brunswick County was one of the hardest hit counties in the US in the recession of 2008-2009, its %MS in the region held close to 7% of the region's business in spite of its proximity to Wilmington and Myrtle Beach in South Carolina.

| County | % MS – 05-06 | % MS – 06-07 | % MS – 07-08 | % MS – 08-09 | % MS – 09-10 | % MS – 10-11 | % MS – 11-12 | % MS – 12-13 | % MS – 13-14 | % MS – 14-15 |
|-------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Bladen | 1.5% | 1.4% | 1.4% | 1.3% | 1.3% | 1.1% | 1.0% | 1.0% | 1.0% | 1.3% |
| Brunswick | 6.8% | 7.0% | 7.2% | 7.1% | 7.3% | 7.5% | 7.8% | 7.9% | 7.9% | 7.7% |
| Carteret | 6.6% | 6.7% | 7.0% | 6.9% | 6.9% | 7.0% | 6.9% | 6.9% | 6.9% | 6.5% |
| Columbus | 3.0% | 2.9% | 2.9% | 2.8% | 2.8% | 2.7% | 2.6% | 2.6% | 2.7% | 2.5% |
| Craven | 6.3% | 6.3% | 6.5% | 6.5% | 6.5% | 6.6% | 6.4% | 6.4% | 7.0% | 7.0% |
| Duplin | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% | 1.9% | 2.0% | 2.1% | 2.2% |
| Greene | 0.4% | 0.3% | 0.3% | 0.3% | 0.4% | 0.3% | 0.3% | 0.3% | 0.3% | 0.4% |
| Johnston | 8.4% | 8.4% | 8.5% | 9.1% | 9.3% | 9.2% | 9.2% | 9.2% | 8.9% | 9.3% |
| Jones | 0.2% | 0.3% | 0.3% | 0.3% | 0.2% | 0.2% | 0.2% | 0.2% | 0.2% | 0.2% |
| Lenoir | 5.3% | 5.3% | 4.9% | 4.7% | 4.4% | 4.3% | 4.0% | 4.1% | 4.0% | 3.8% |
| New Hanover | 24.2% | 24.3% | 24.2% | 23.8% | 24.1% | 24.7% | 24.4% | 23.9% | 22.3% | 21.6% |
| Onslow | 8.5% | 8.8% | 9.2% | 9.9% | 10.2% | 9.9% | 10.1% | 10.3% | 11.3% | 12.5% |
| Pamlico | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.5% | 0.4% | 0.5% | 0.5% | 0.5% |
| Pender | 1.4% | 1.4% | 1.6% | 1.6% | 1.7% | 2.0% | 2.0% | 2.0% | 1.9% | 2.0% |
| Robeson | 6.3% | 6.3% | 6.2% | 6.0% | 5.8% | 5.6% | 5.9% | 5.7% | 6.1% | 6.2% |
| Sampson | 3.1% | 3.0% | 2.8% | 2.9% | 2.8% | 2.8% | 2.6% | 2.5% | 2.4% | 2.8% |
| Wayne | 8.7% | 8.7% | 8.4% | 8.4% | 8.3% | 8.1% | 8.0% | 8.0% | 8.3% | 7.1% |
| Wilson | 6.8% | 6.6% | 6.4% | 5.8% | 5.5% | 5.5% | 6.1% | 6.5% | 6.2% | 6.2% |

Pender County, with beach frontage and a similar population to Brunswick (urban centers north and south of it) has a much lower %MS. This is primarily because the majority of Pender County's population lives within 20 miles of downtown Wilmington in New Hanover County and New Hanover 'pulls' a lot of consumer spending out of Pender County. A more in depth City Trade Pull Factors for North Carolina towns might show a change in Pender County's %MS with Wal-Mart and several fast food chains opening stores in Burgaw. However the most populous region of Pender County is on the southeast side of the county where the unincorporated town of Hampstead lies. Capturing Hampstead sales tax is more difficult because the sales tax generated from grocery stores, gas stations and restaurants on this side of the county is combined with other sales tax revenue data in the county. This makes it difficult to show how much influence New Hanover County and Wilmington have on Pender County and specifically the Hampstead area.

Military spending was mentioned earlier in the report as having significant influences on a number of counties. New Hanover, Onslow and Wayne are the primary recipients of a significant amount of investment by the federal government into military bases in these counties. New Hanover County, Wayne and Craven County also benefit from the military's presence in terms of population and spending power.

In recent years a highway expansion project in Lenoir County (bypass around Kinston on Hwy 70) County and a community wide effort to promote local food production and sales has led to the creation of a microbrew industry and a farm to fork restaurant business.

CONCLUSION

North Carolina's most populous counties capture the highest percentage of sales tax when looking at CTPF, TAC and %MS but these factors are all greatly influenced by other factors such as interstate access, research and medical centers, military bases and natural resources like the mountains and beaches. In southeast North Carolina sales tax revenues certainly have an impact on county economies. The aforementioned influences generate millions of sales dollars in sales tax revenue in New Hanover, Onslow, Craven and Wayne County but at the end of the day, most counties in southeast NC, and across NC, depend heavily on agriculture production and the sale of agriculture products.

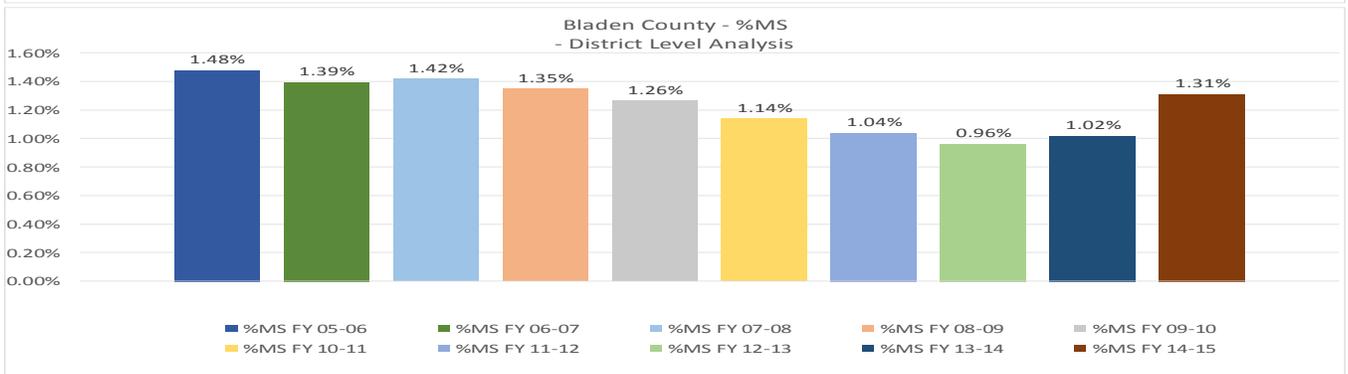
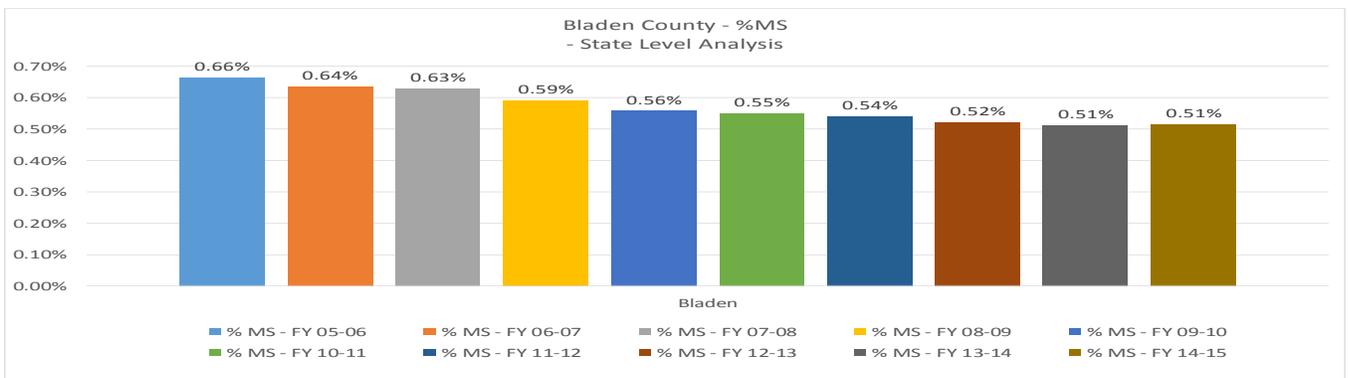
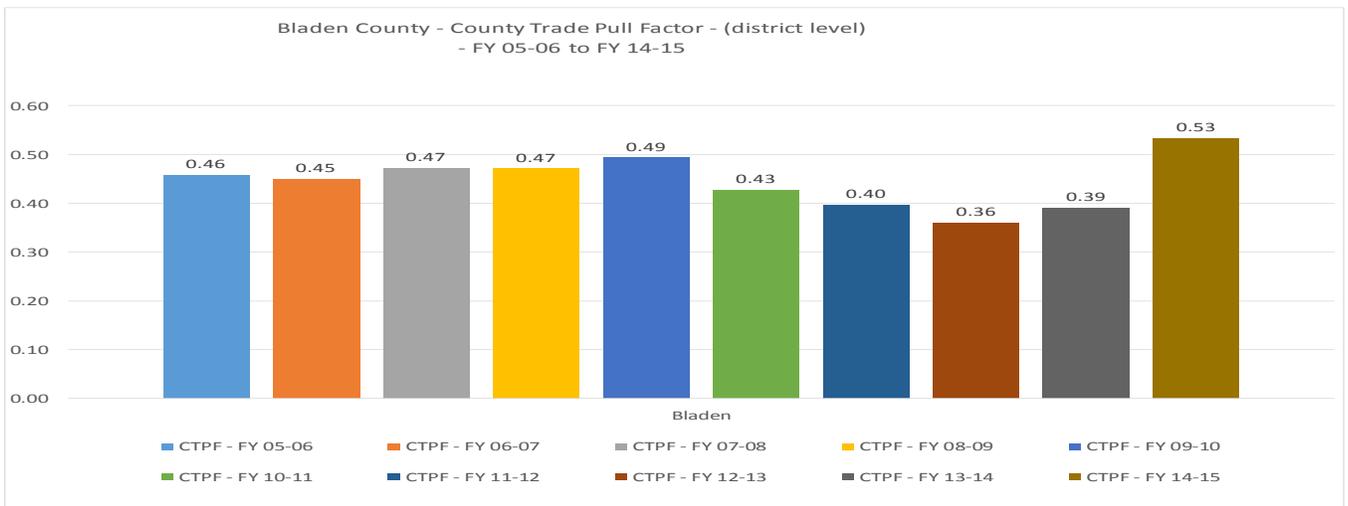
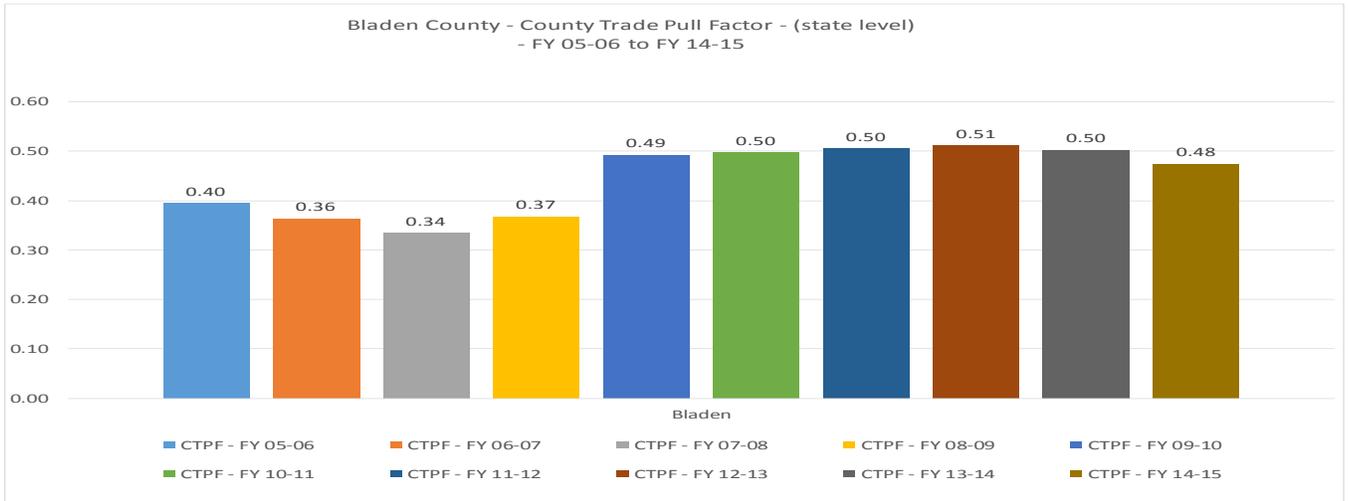
While there is no doubt sales tax revenue, driven by industries other than agriculture, has a huge influence on many counties in southeast NC, even the largest agriculture producing counties in the US: Sampson and Duplin, must rely heavily on property taxes or sources of revenue other than sales tax to pay for schools, roads and other social programs. This report hopefully highlights where those impacts on landowners are the greatest.

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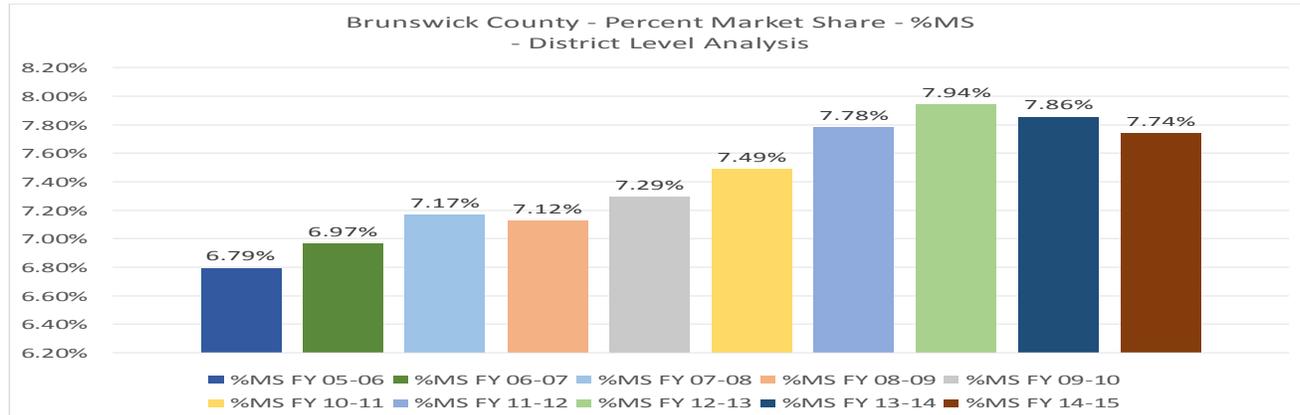
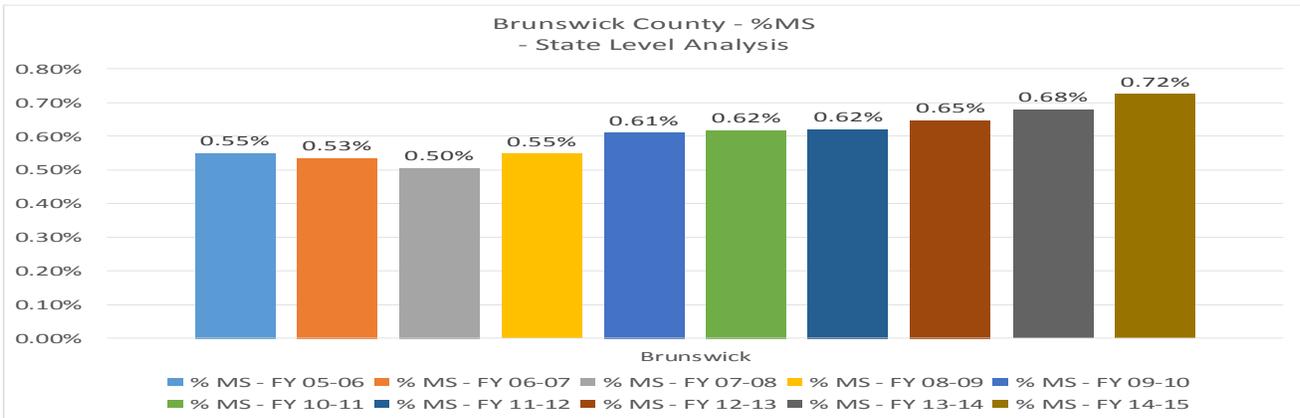
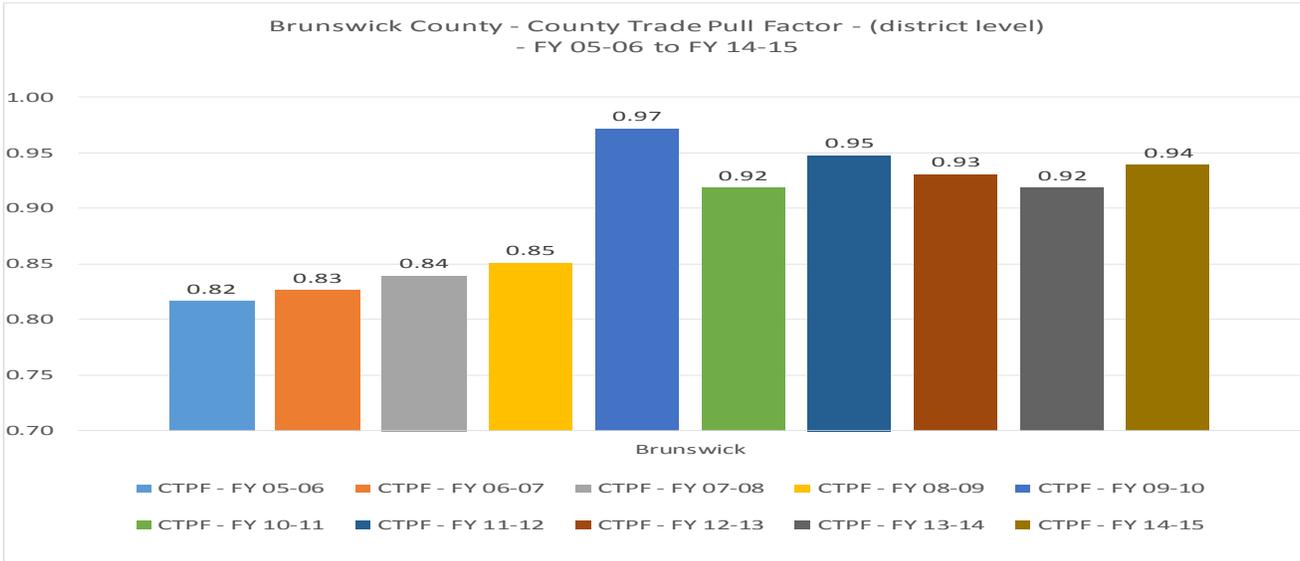
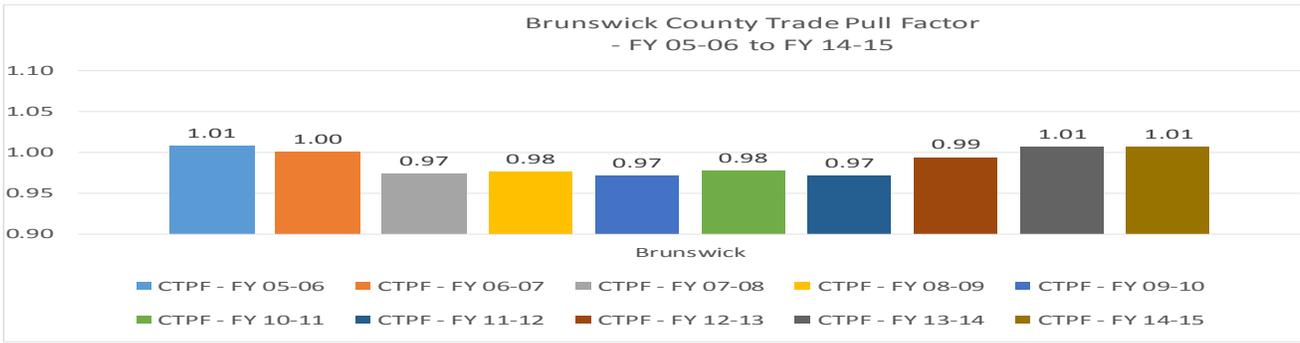
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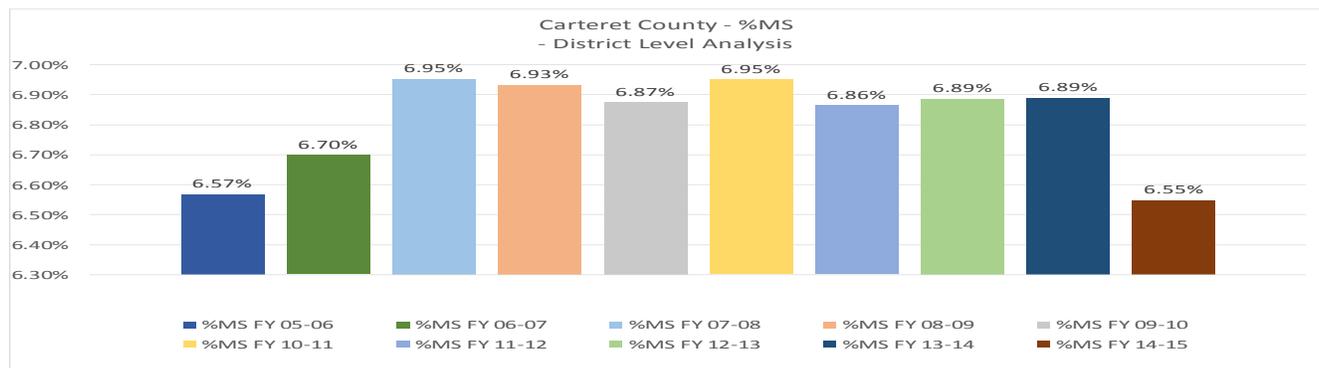
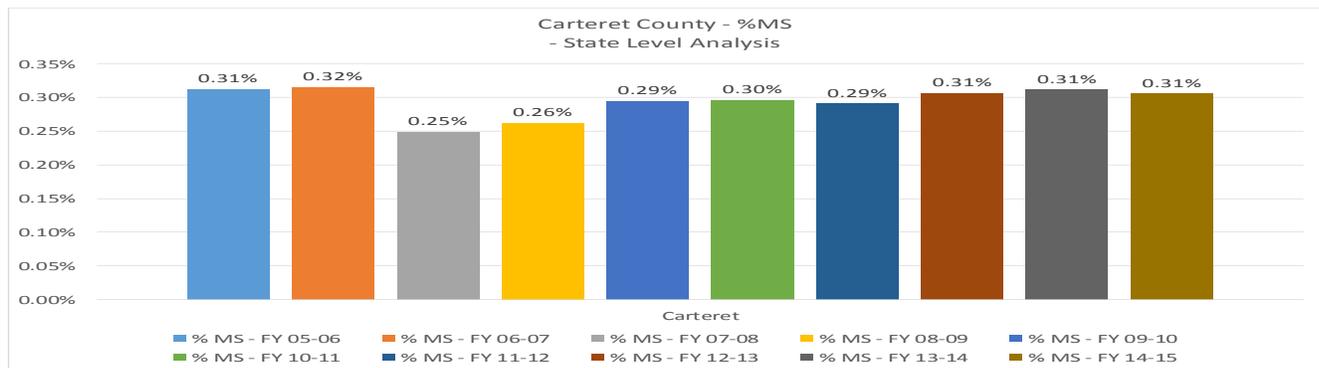
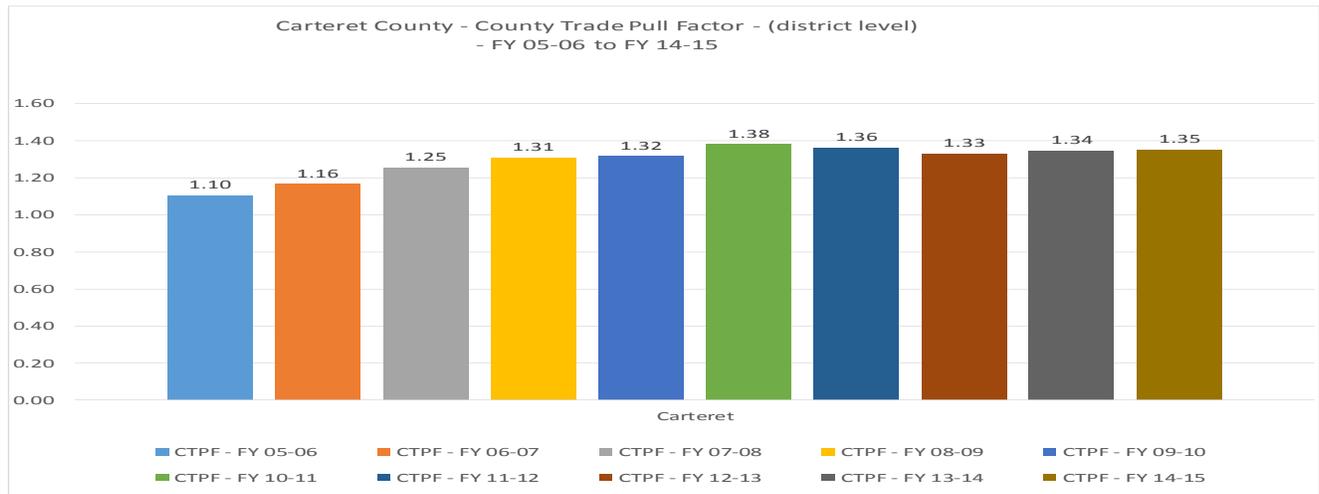
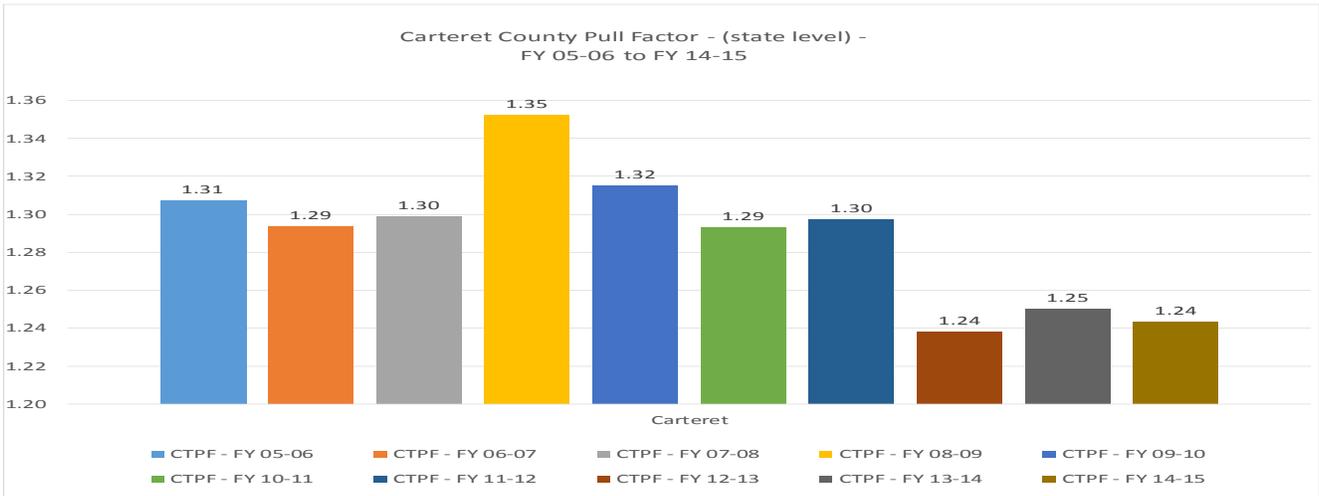
Appendix I: District CTPF and %MS Graphs for Southeast NC

Bladen County

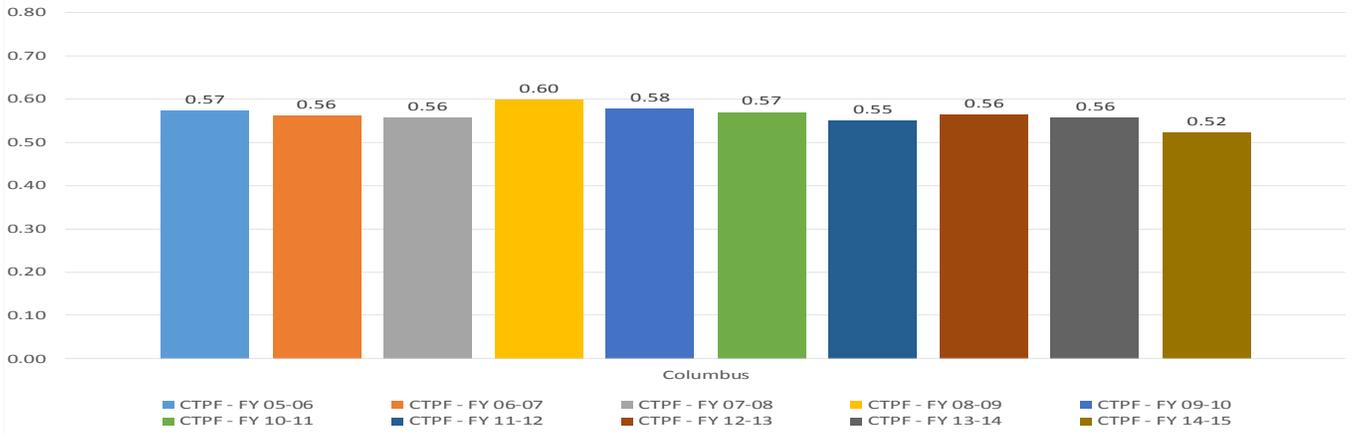


Brunswick County

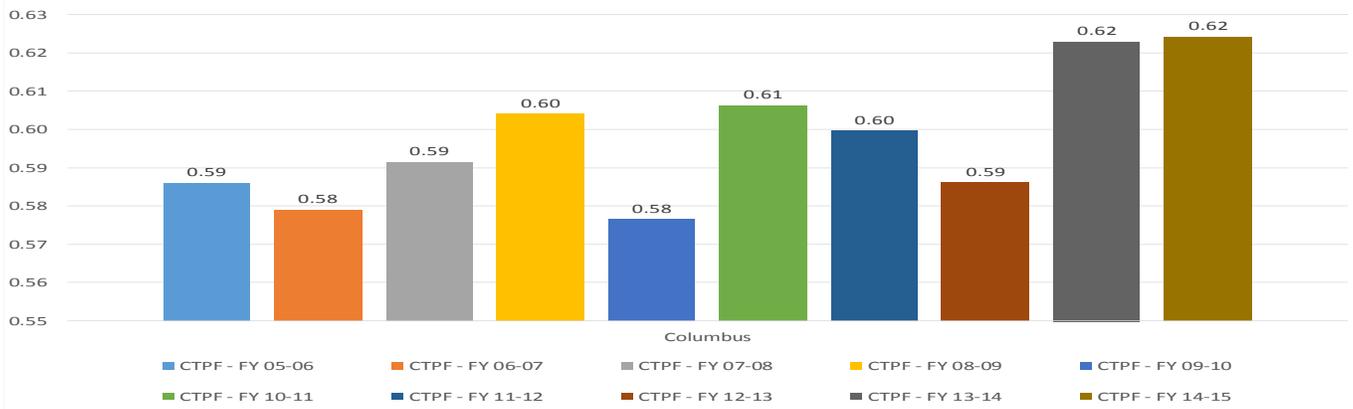




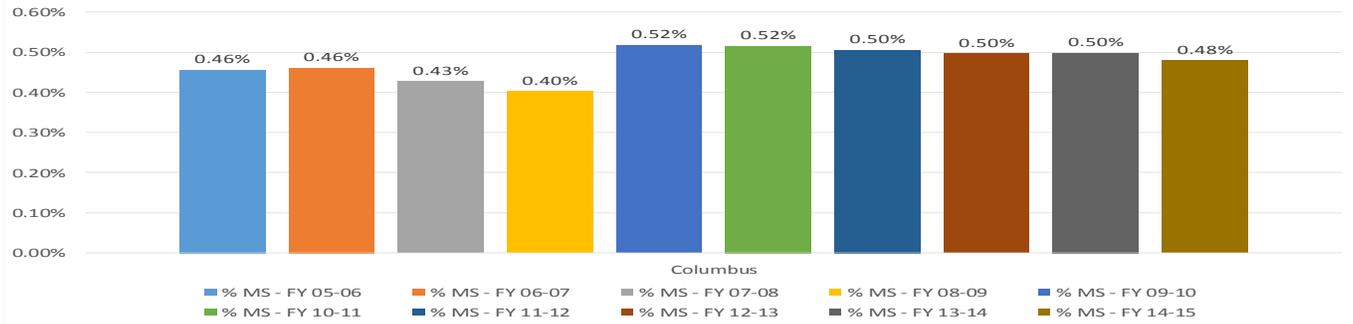
Columbus County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



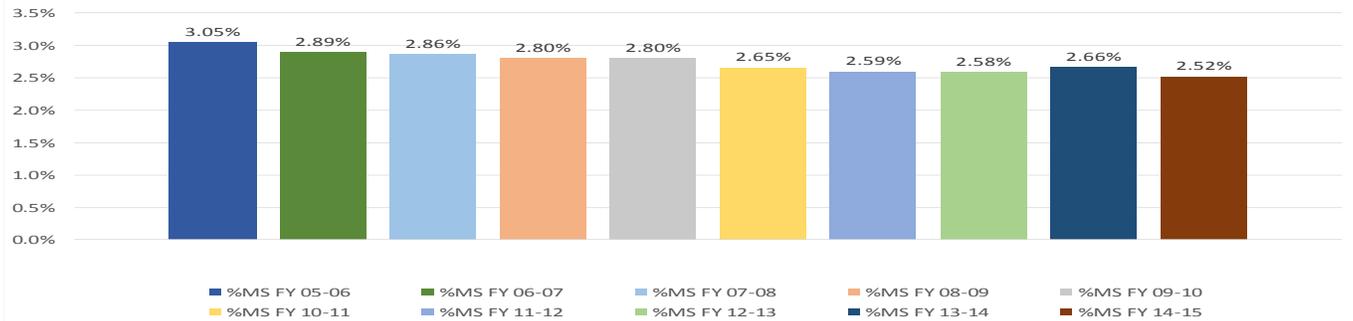
Columbus County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



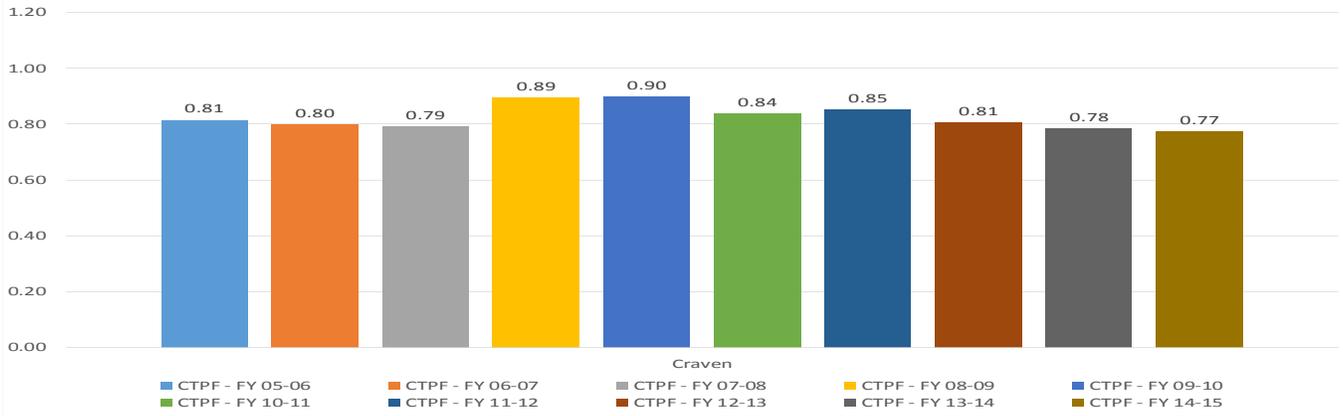
Columbus County - %MS
- State Level Analysis



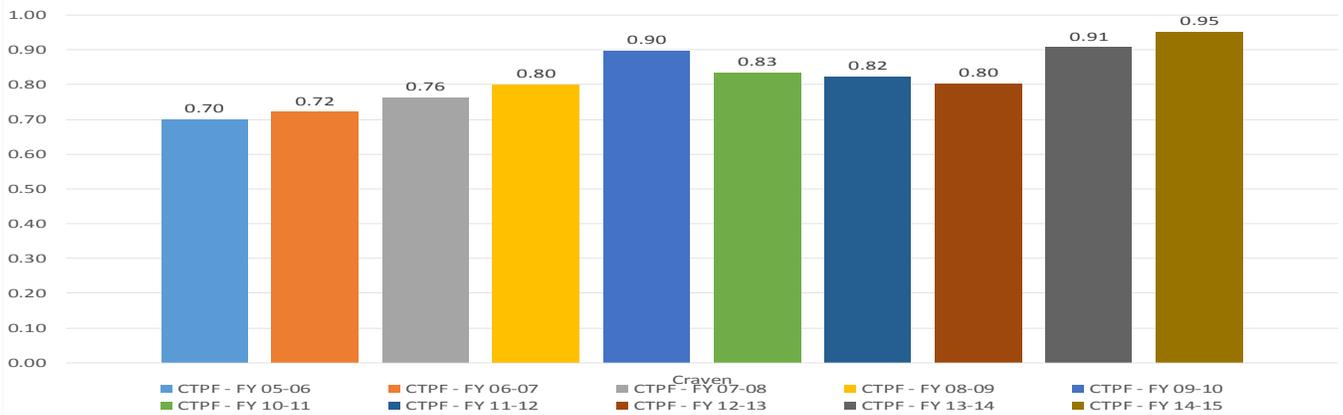
Columbus County - %MS
- District Level Analysis



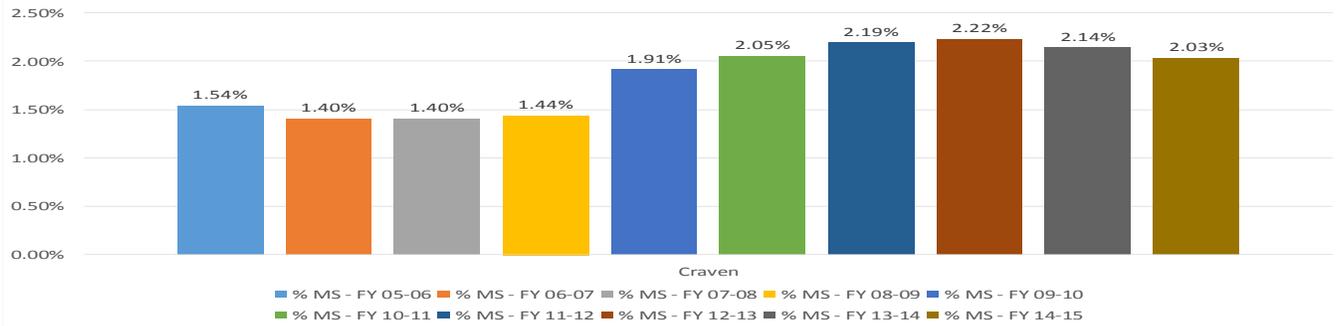
Craven County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



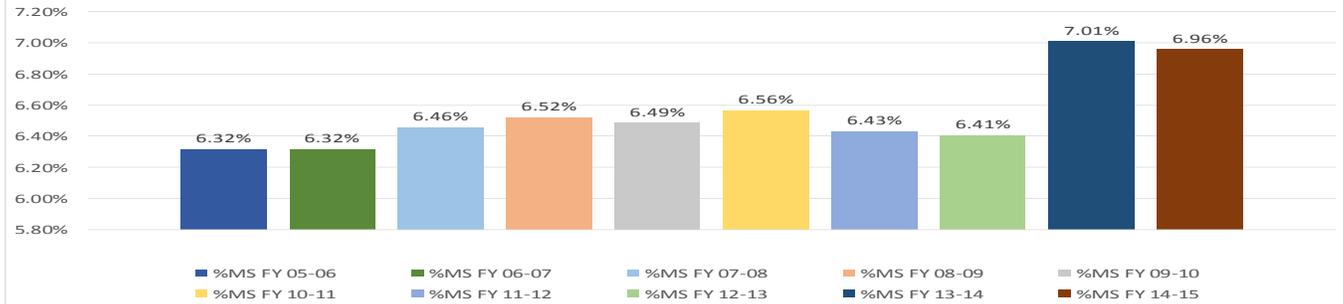
Craven County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



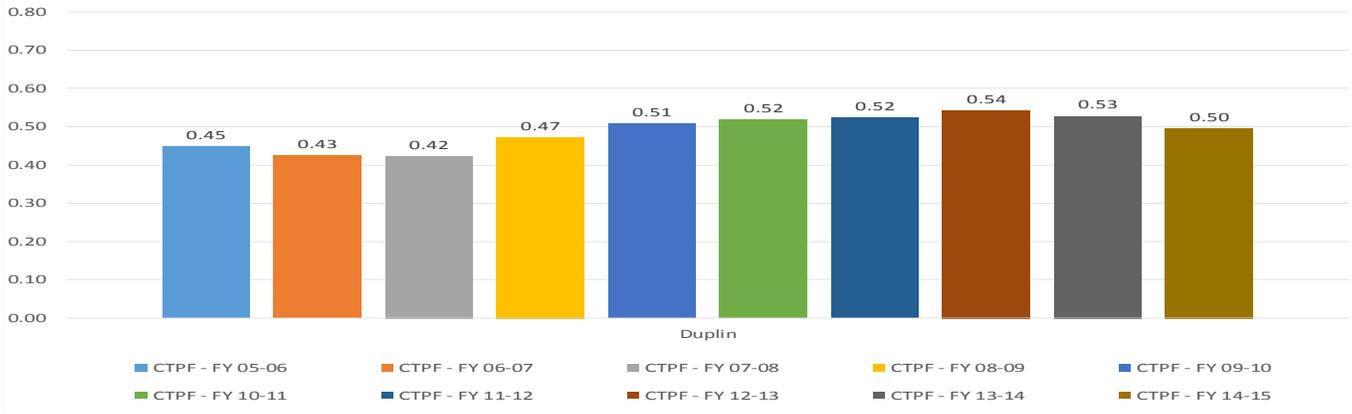
Craven County - %MS
- State Level Analysis



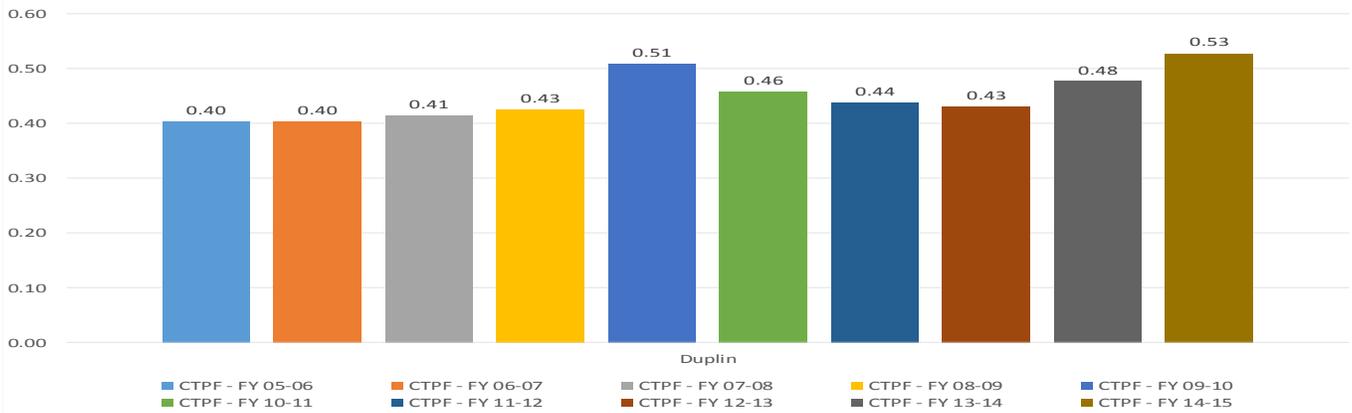
Craven County - %MS
- District Level Analysis



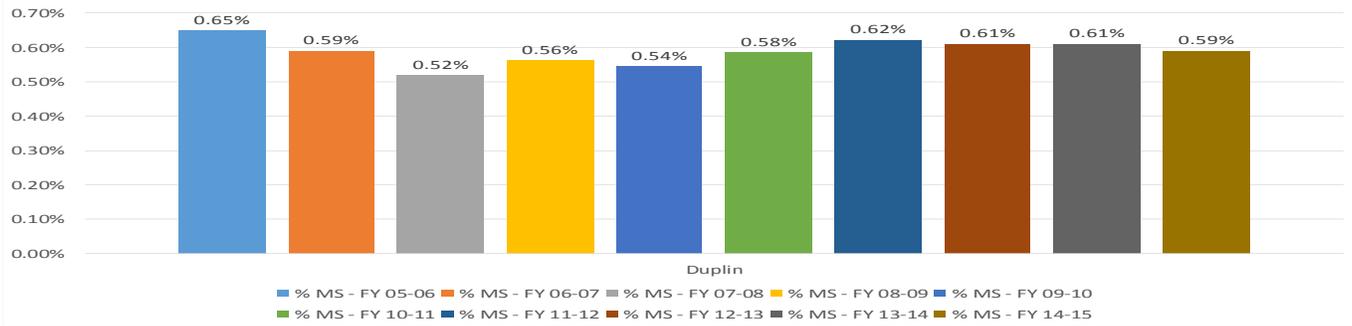
Duplin County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



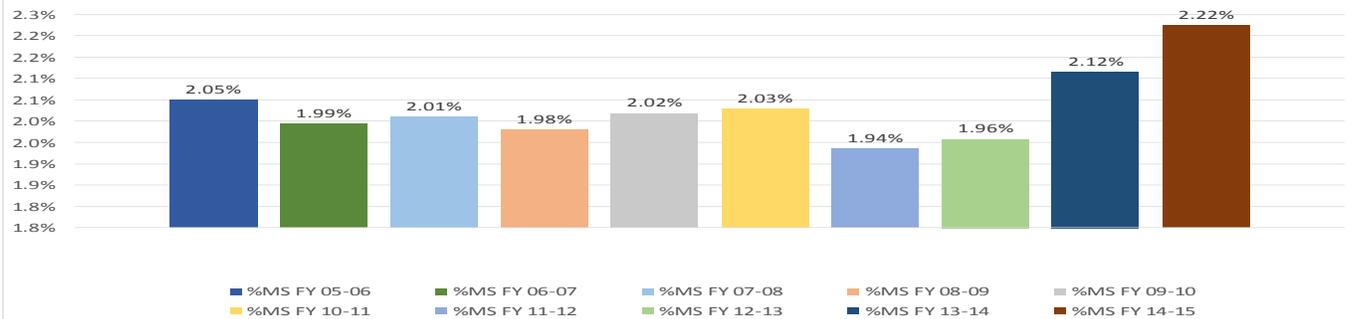
Duplin County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



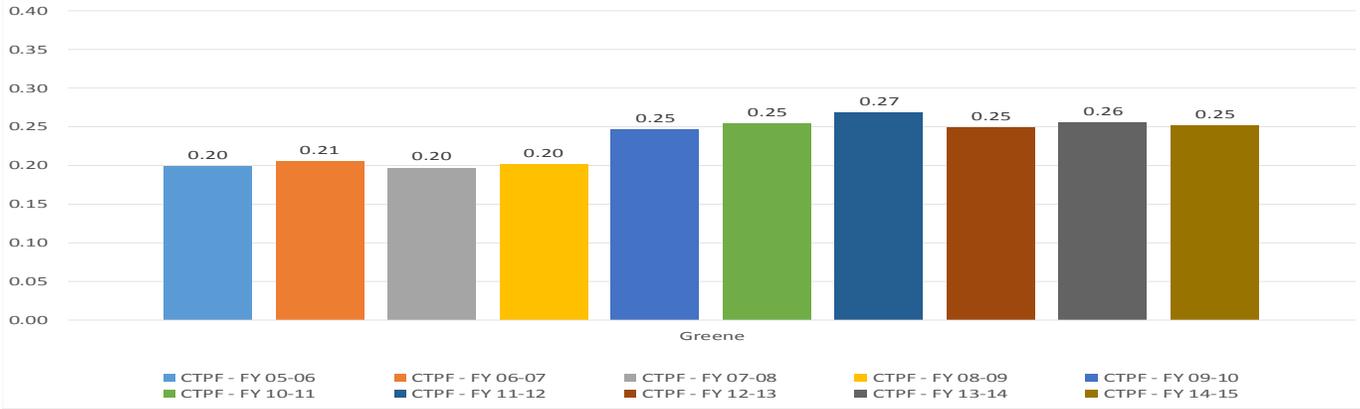
Duplin County - %MS
- State Level Analysis



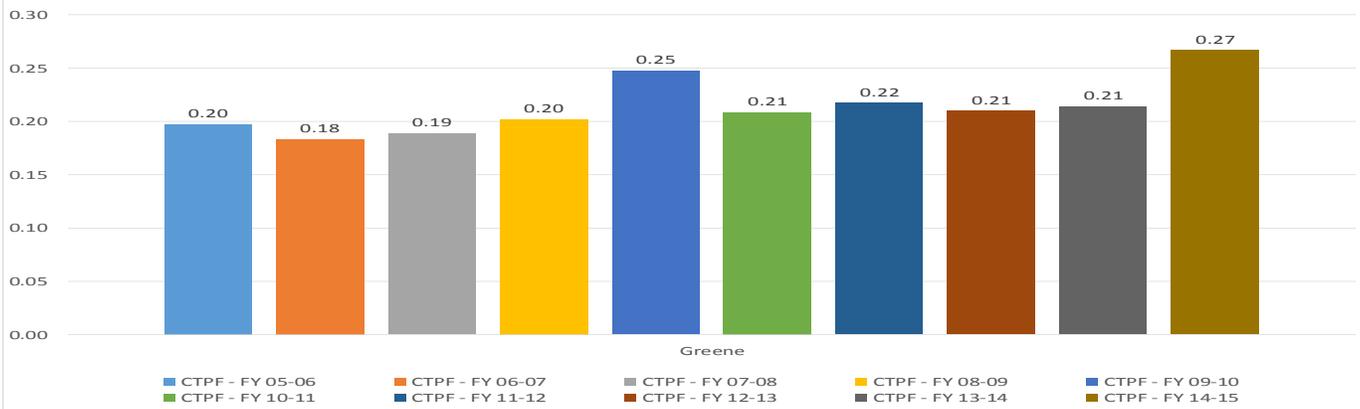
Duplin County - %MS
- District Level Analysis



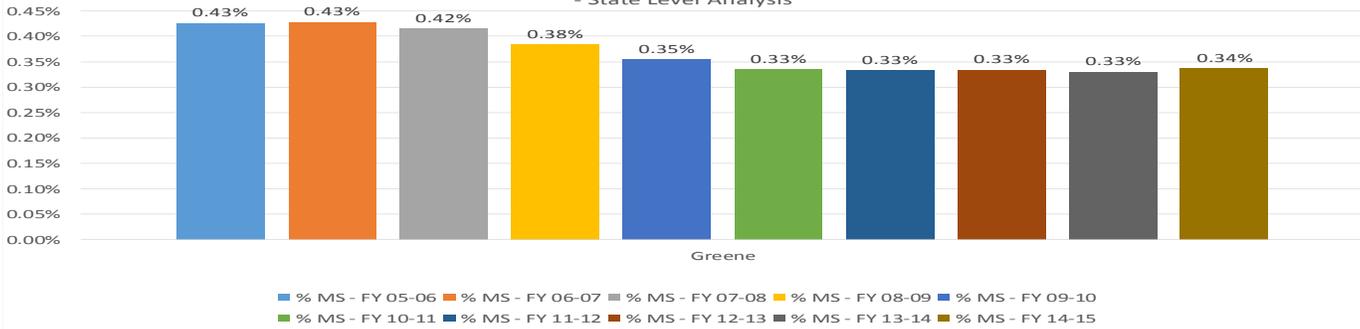
Greene County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



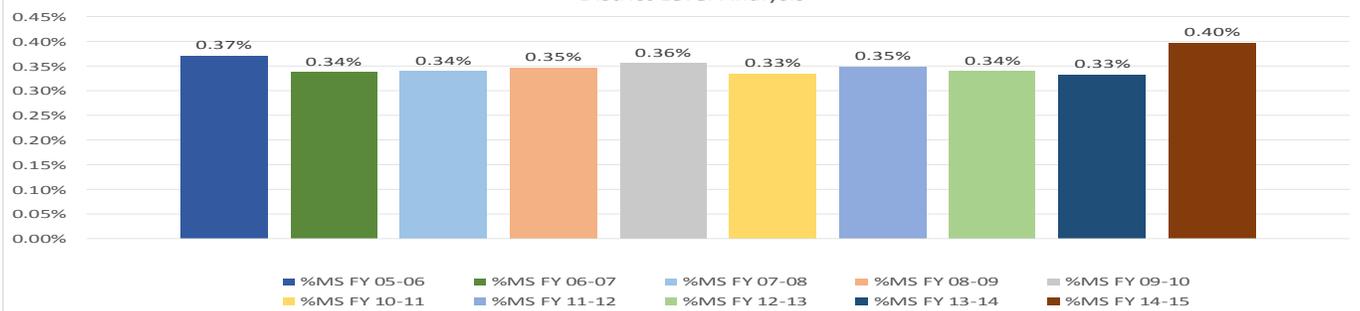
Greene County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



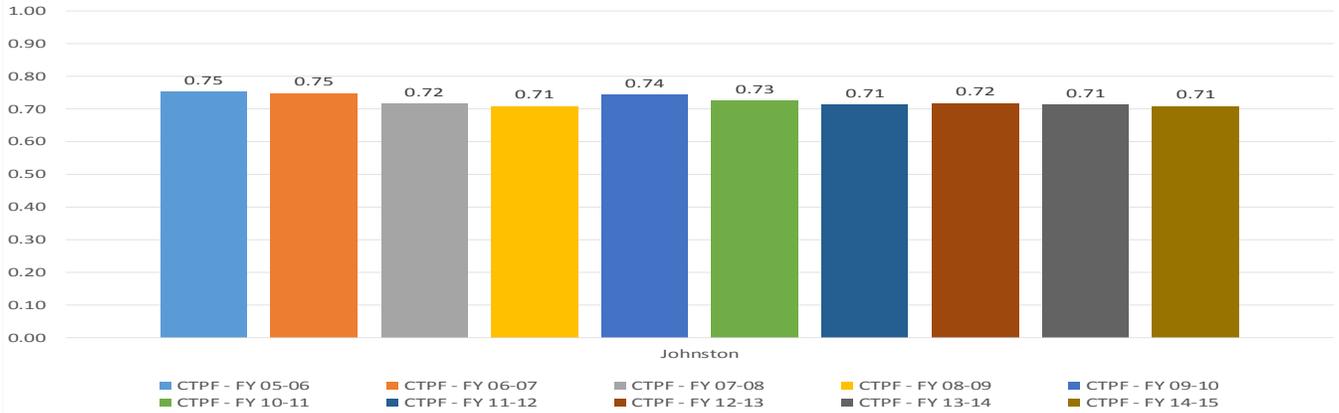
Greene County - %MS
- State Level Analysis



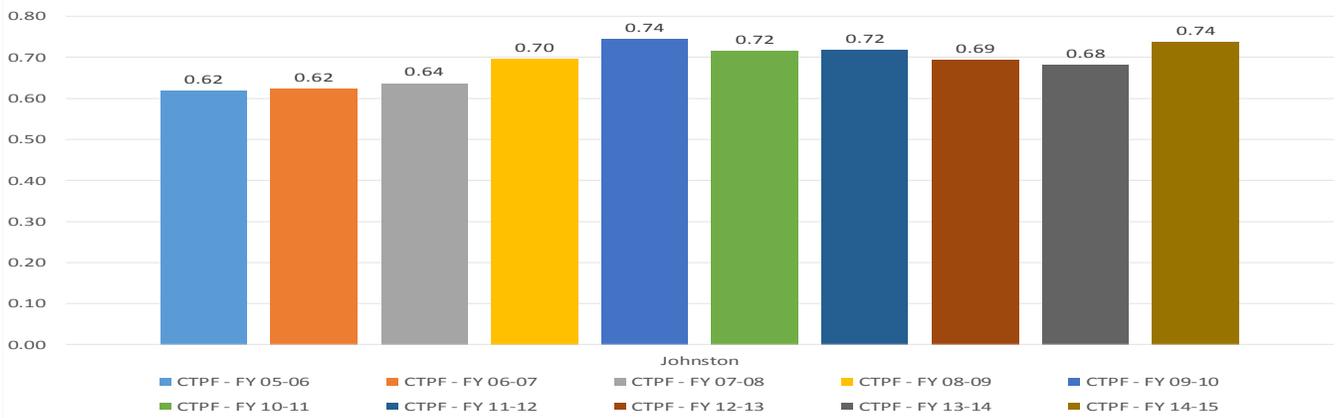
Greene County - %MS
- District Level Analysis



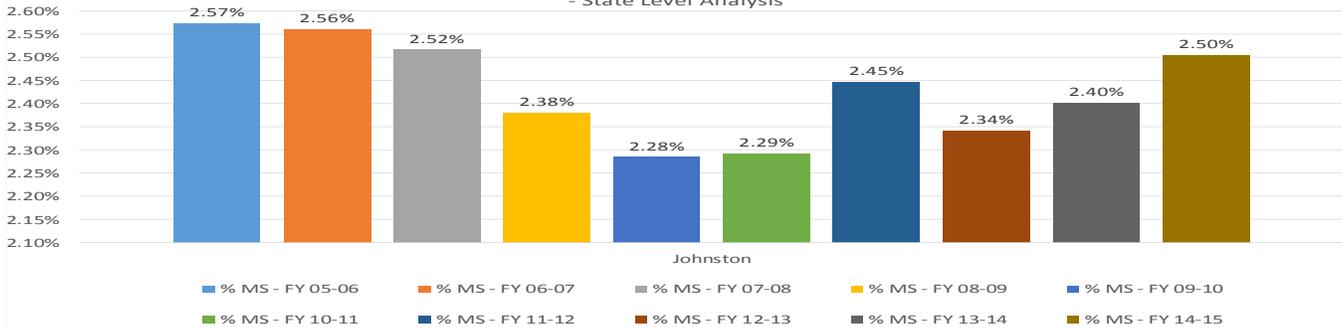
Johnston County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



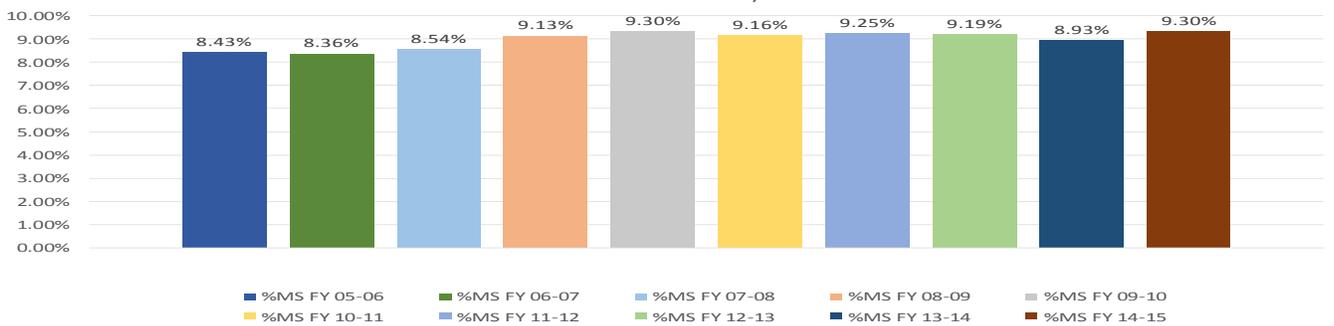
Johnston County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



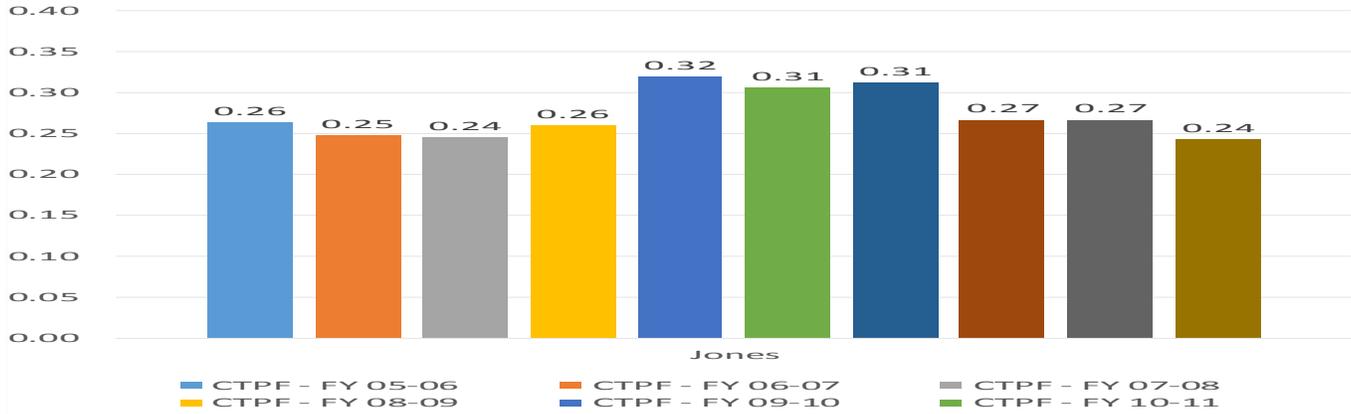
Johnston County - %MS
- State Level Analysis



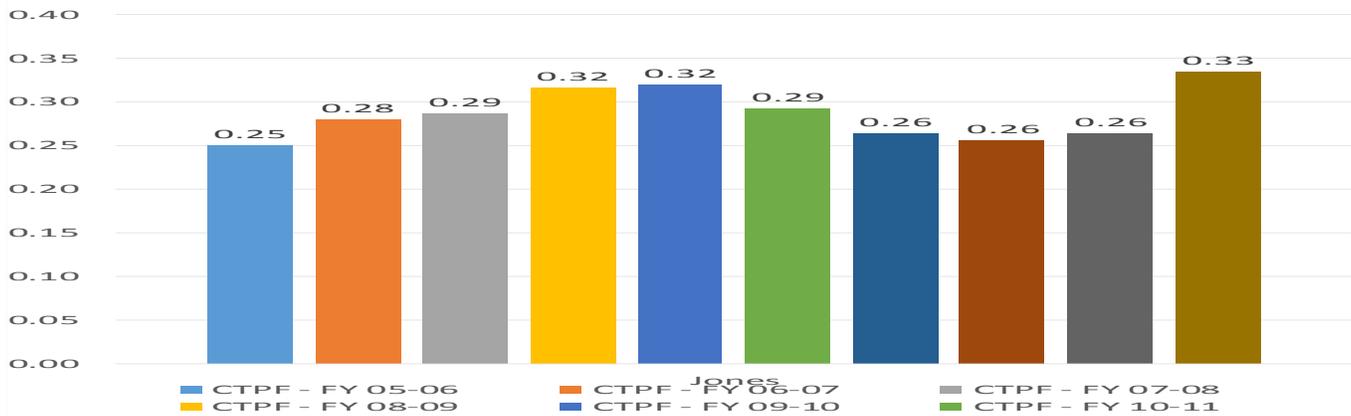
Johnston County - %MS
- District Level Analysis



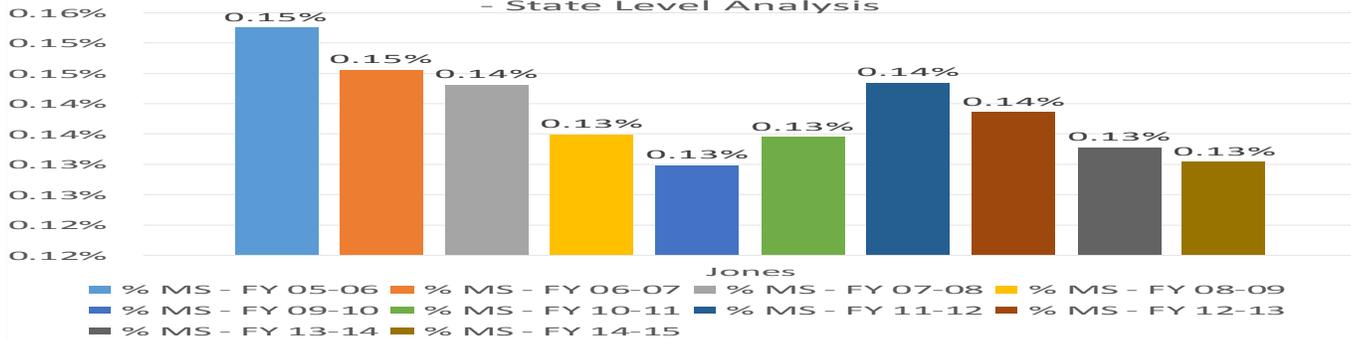
**Jones County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to
FY 14-15**



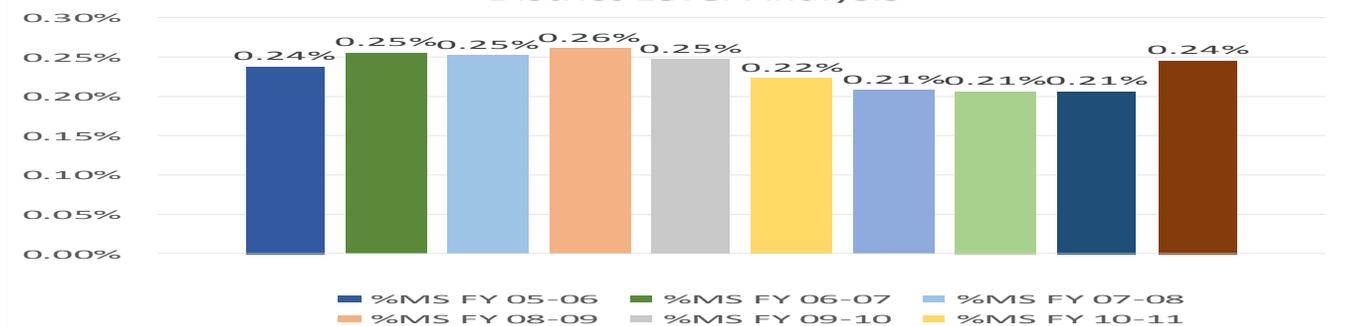
**Jones County - County Trade Pull Factor - (district level
analysis)
- FY 05-06 to FY 14-15**



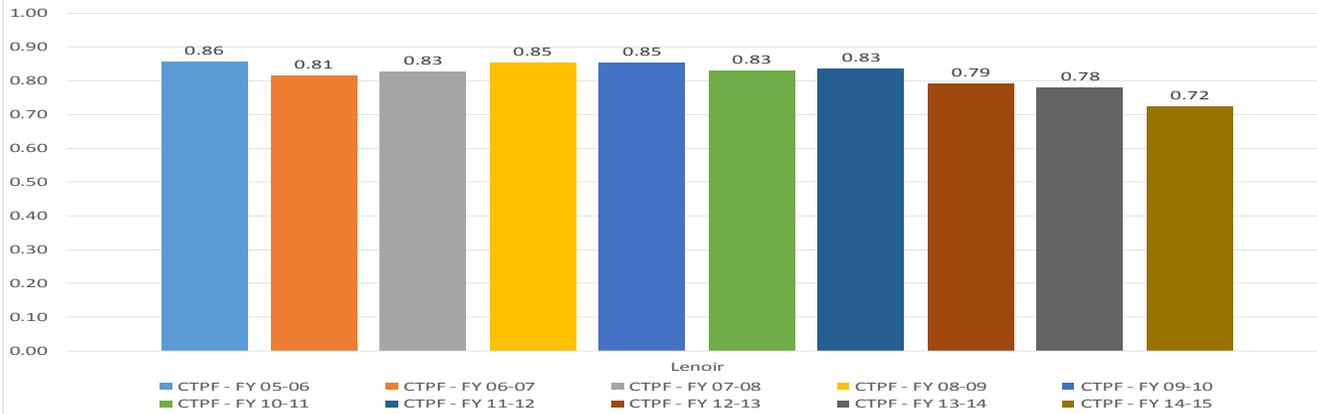
**Jones County - %MS
- State Level Analysis**



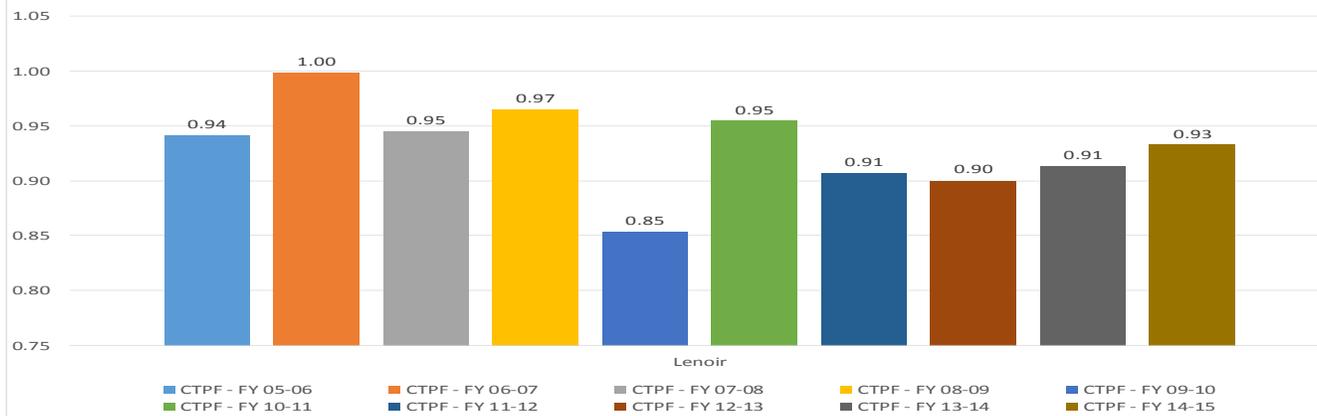
**Jones County - %MS
- District Level Analysis**



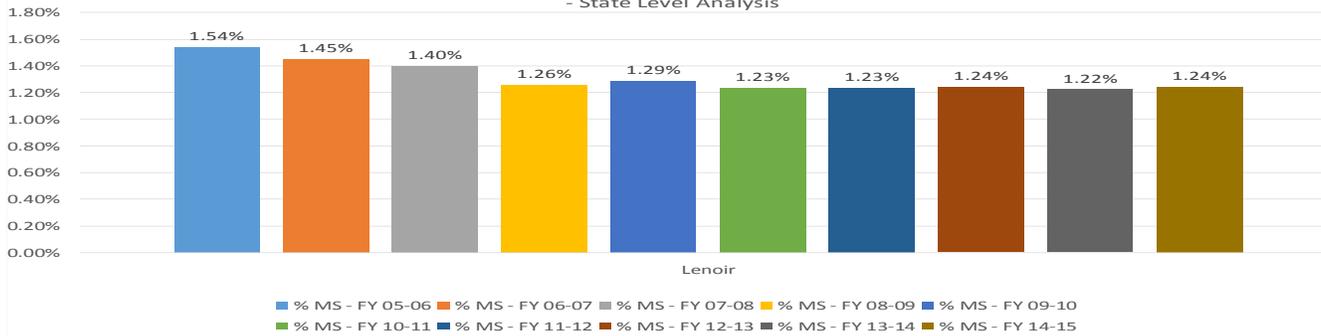
Lenoir County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



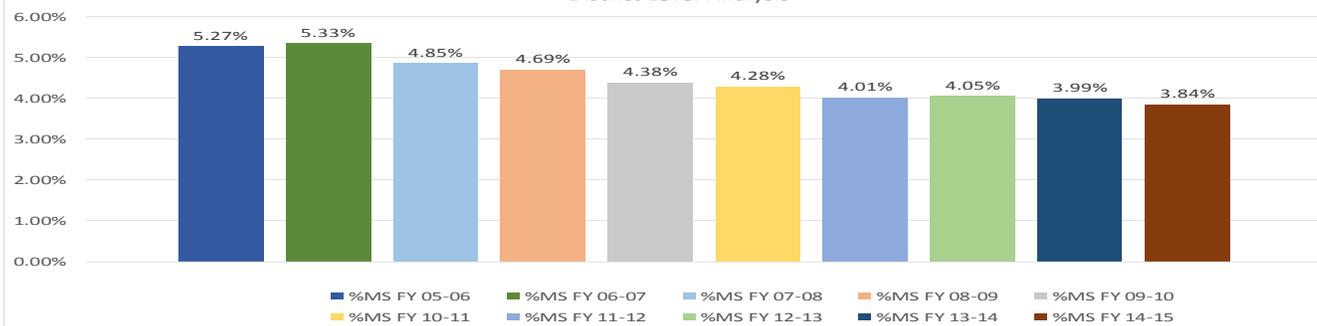
Lenoir County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



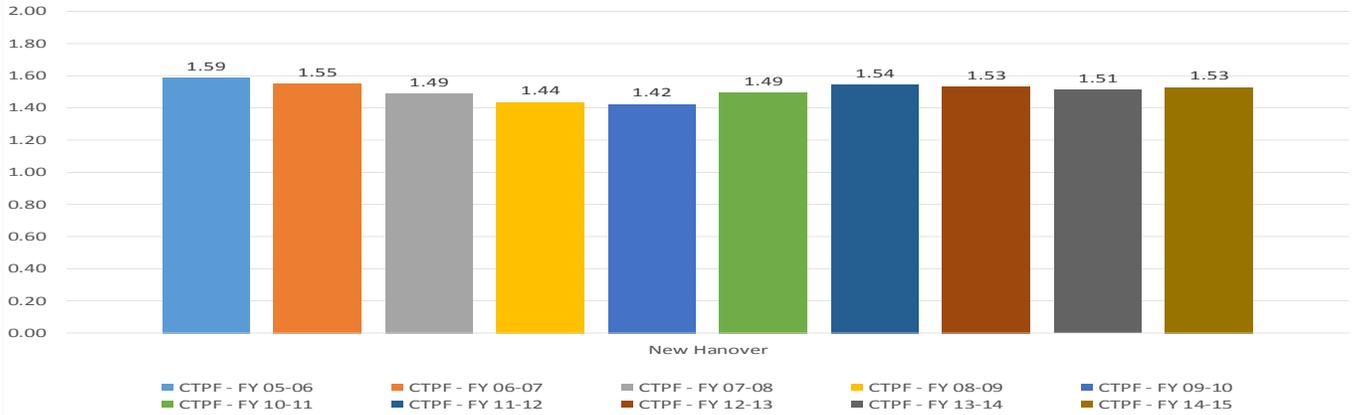
Lenoir County - %MS
- State Level Analysis



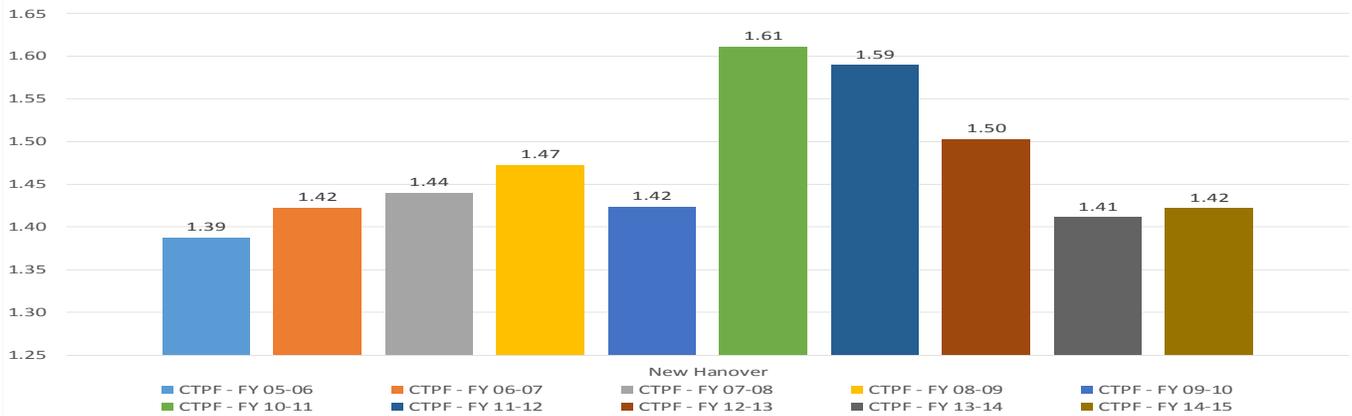
Lenoir County - %MS
- District Level Analysis



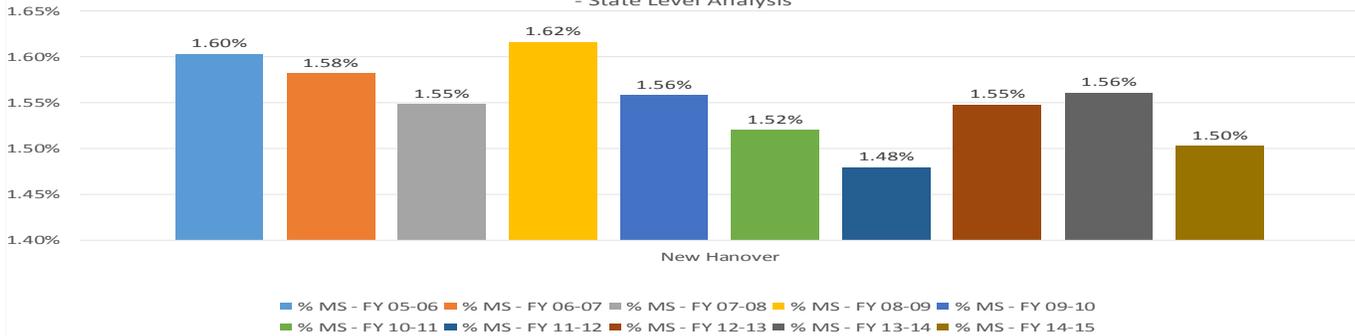
New Hanover County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



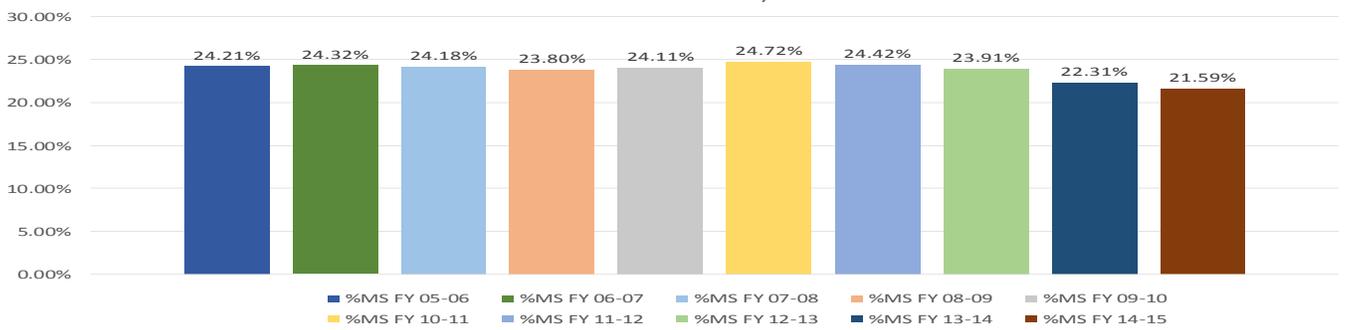
New Hanover County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



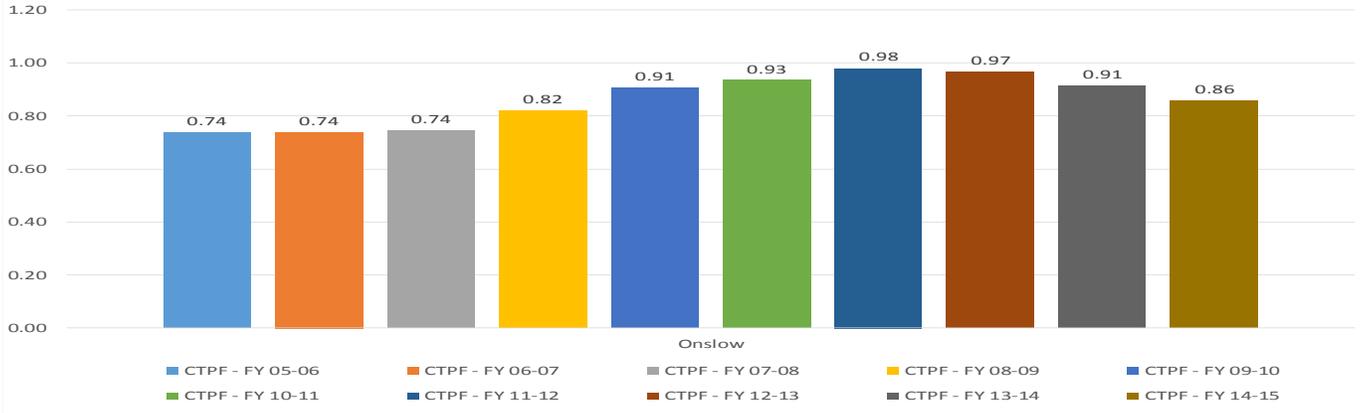
New Hanover County - %MS
- State Level Analysis



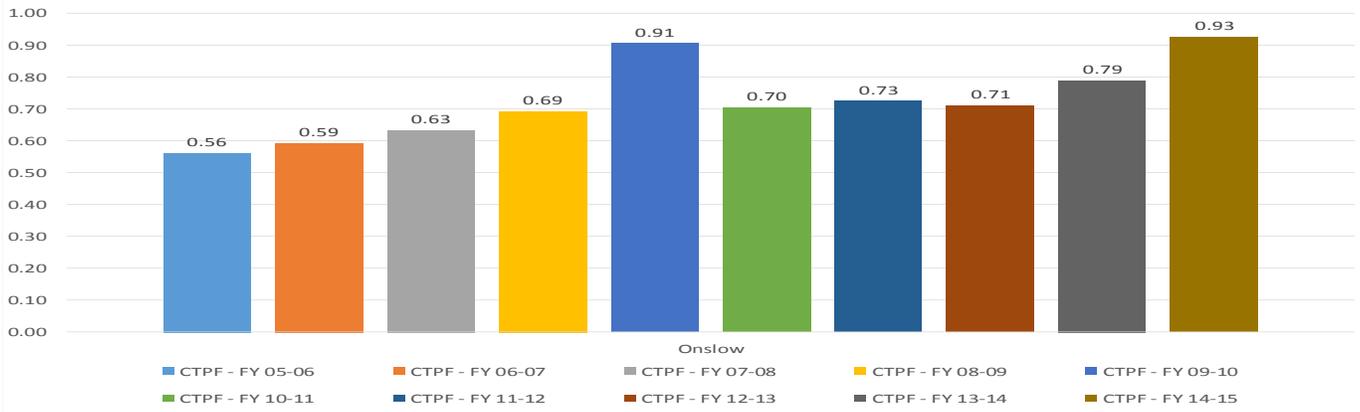
New Hanover County - %MS
- District Level Analysis



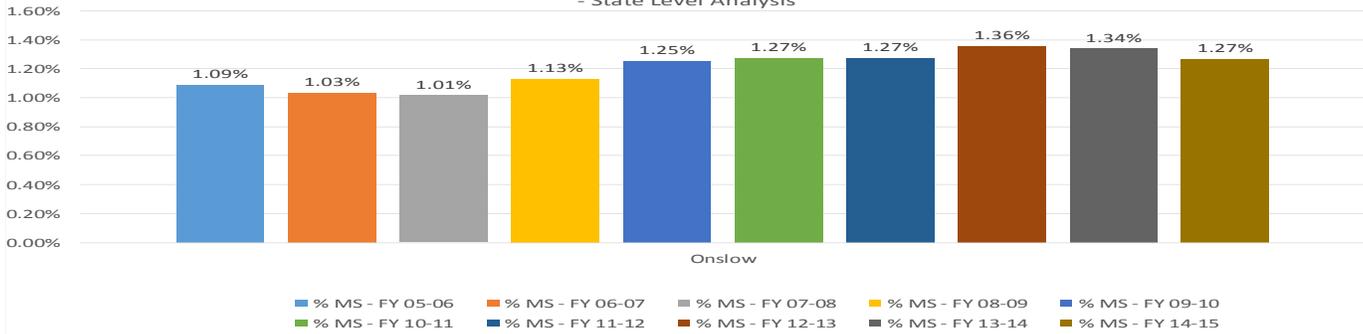
Onslow County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



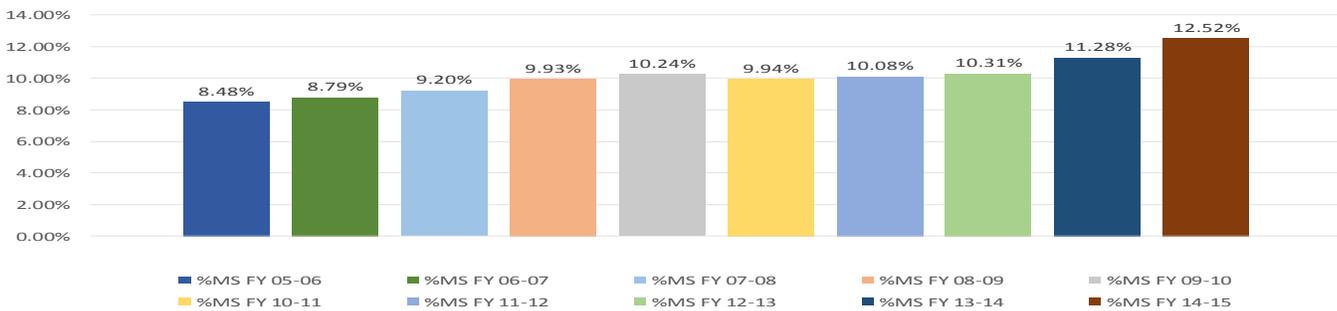
Onslow County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



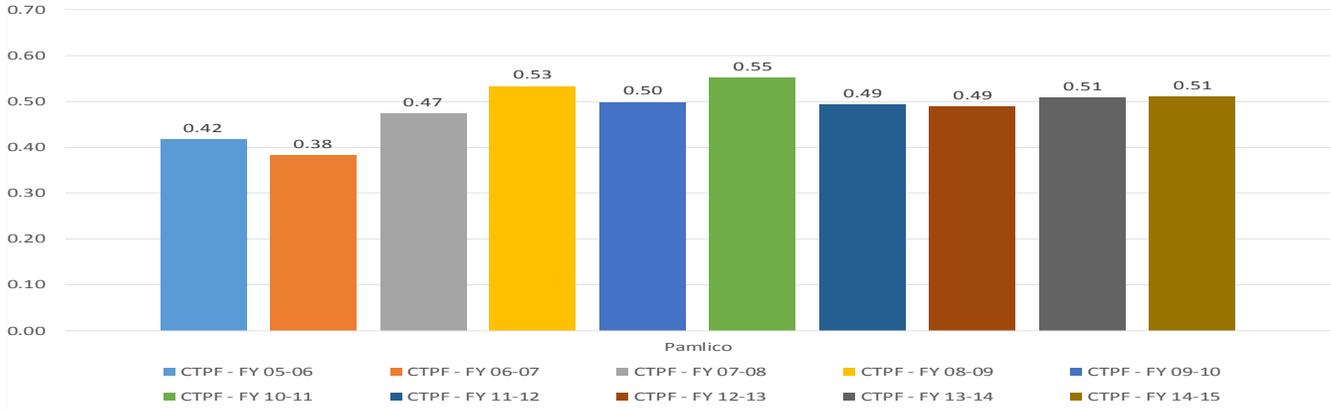
Onslow County - %MS
- State Level Analysis



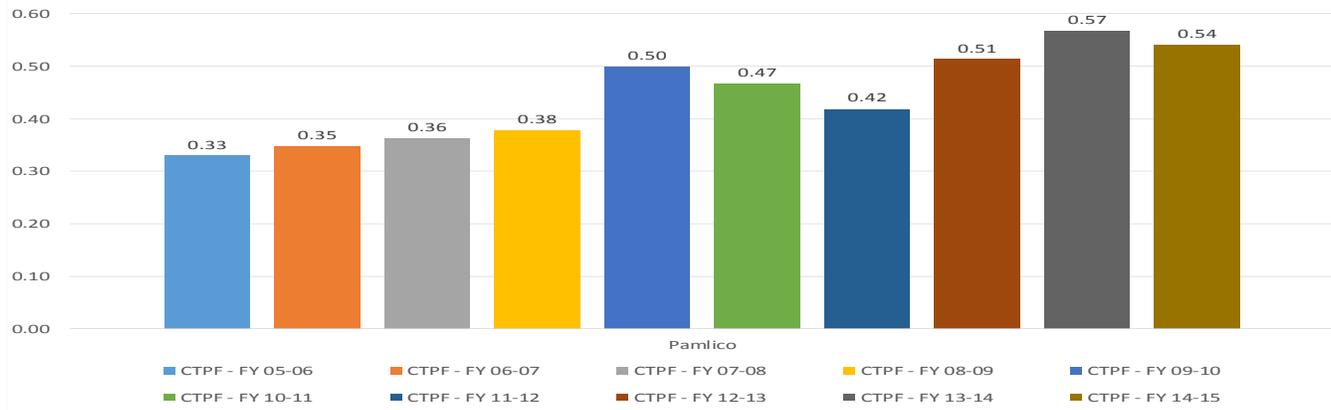
Onslow County - %MS
- District Level Analysis



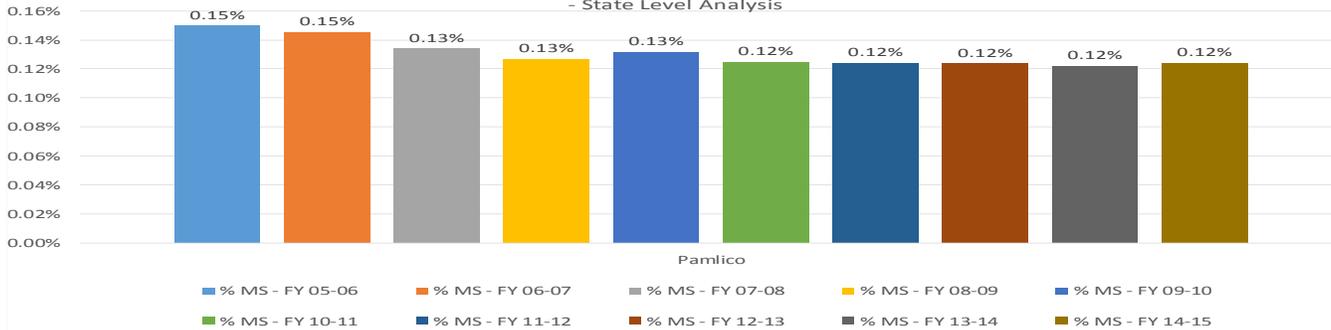
Pamlico County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



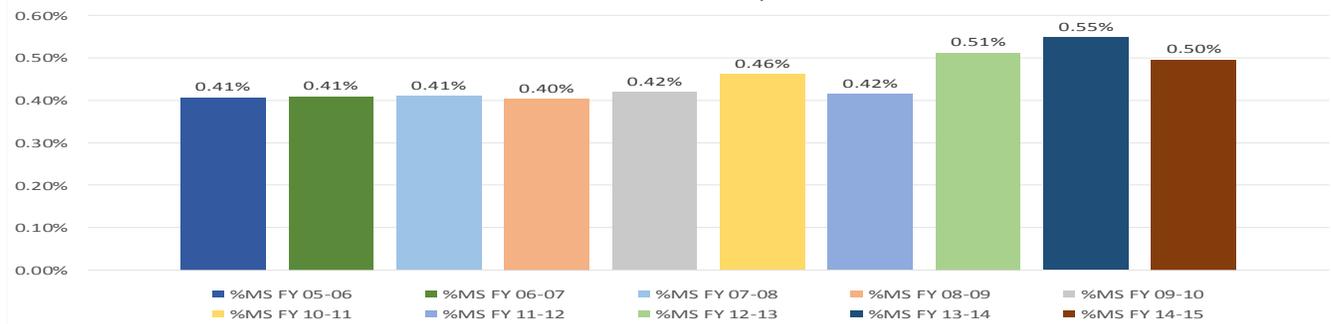
Pamlico County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



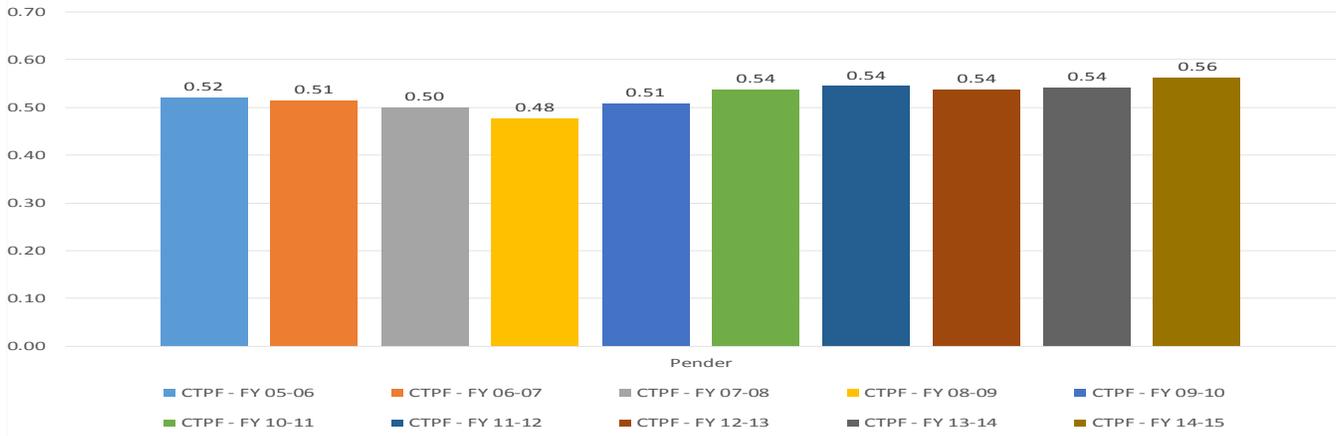
Pamlico County - %MS
- State Level Analysis



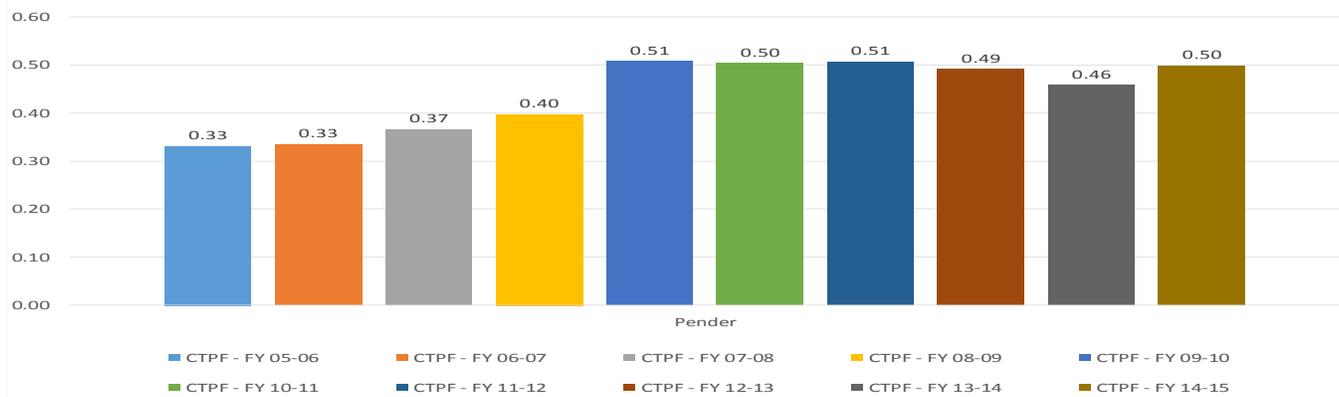
Pamlico County - %MS
- District Level Analysis



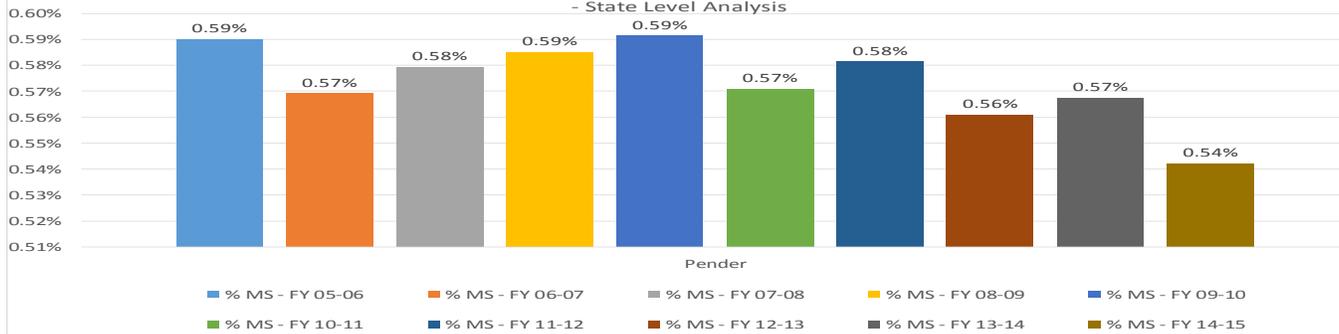
Pender County Pull Factor
(State level analysis) - FY 05-06 to FY 14-15



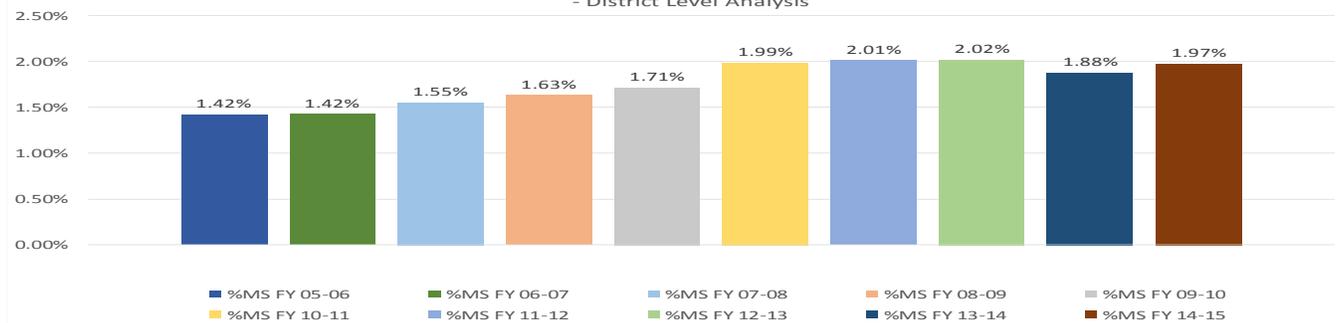
Pender County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



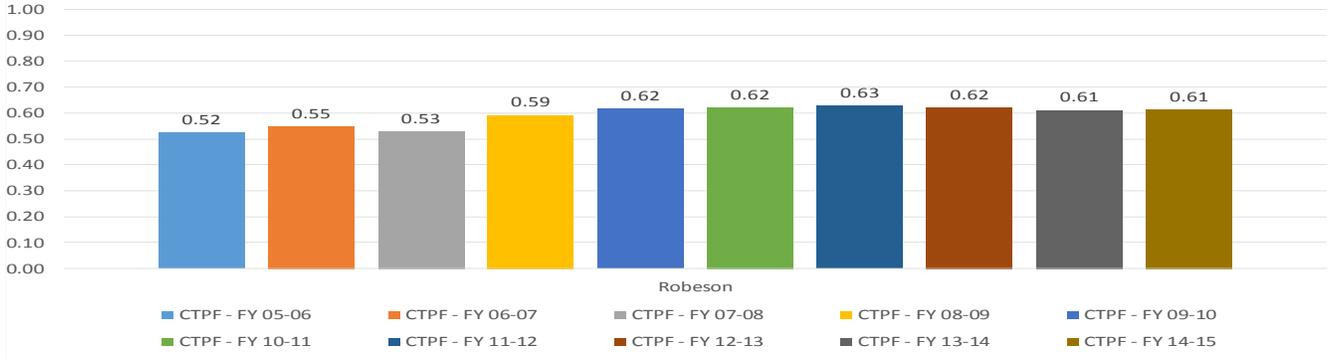
Pender County - %MS
- State Level Analysis



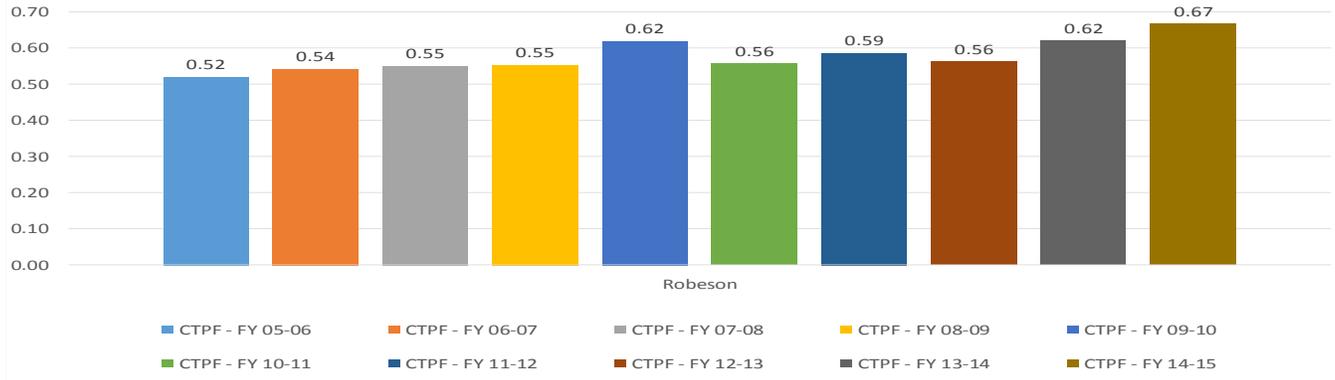
Pender County - %MS
- District Level Analysis



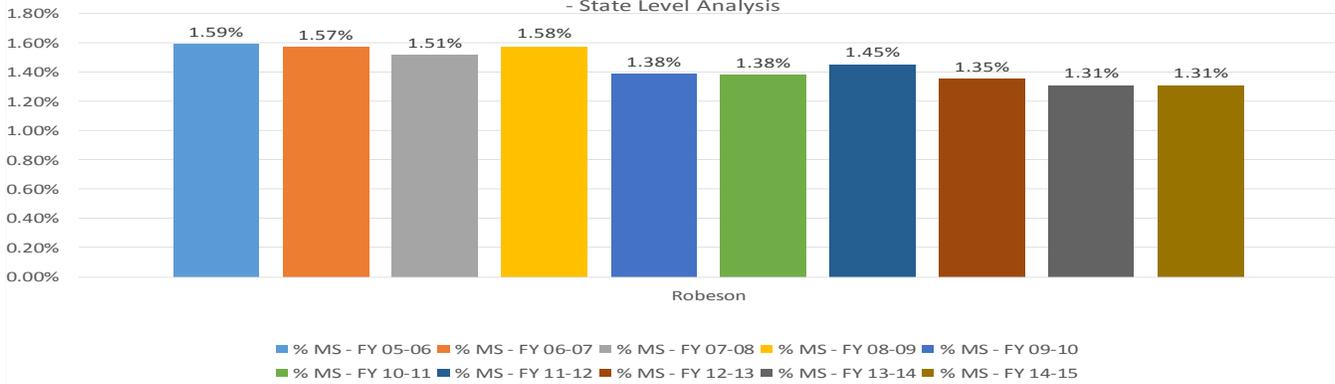
Robeson County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



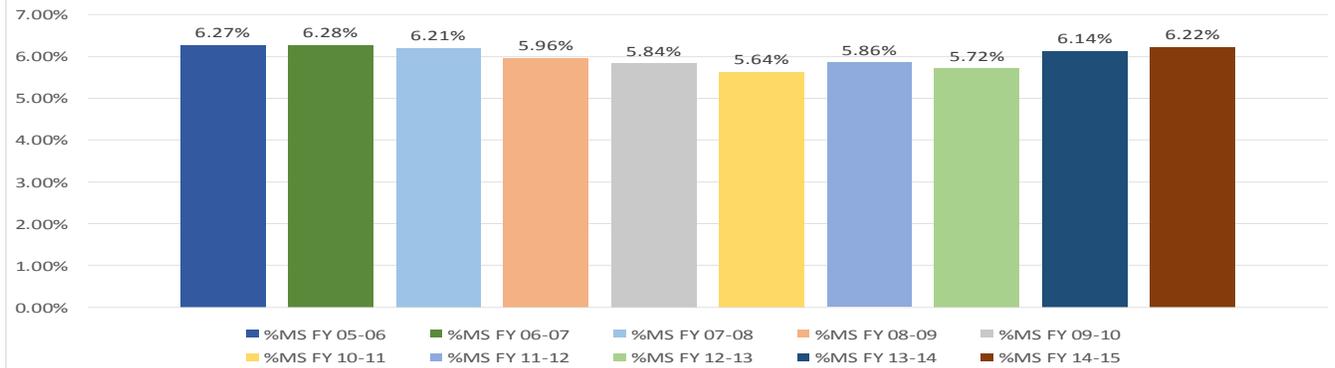
Robeson County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



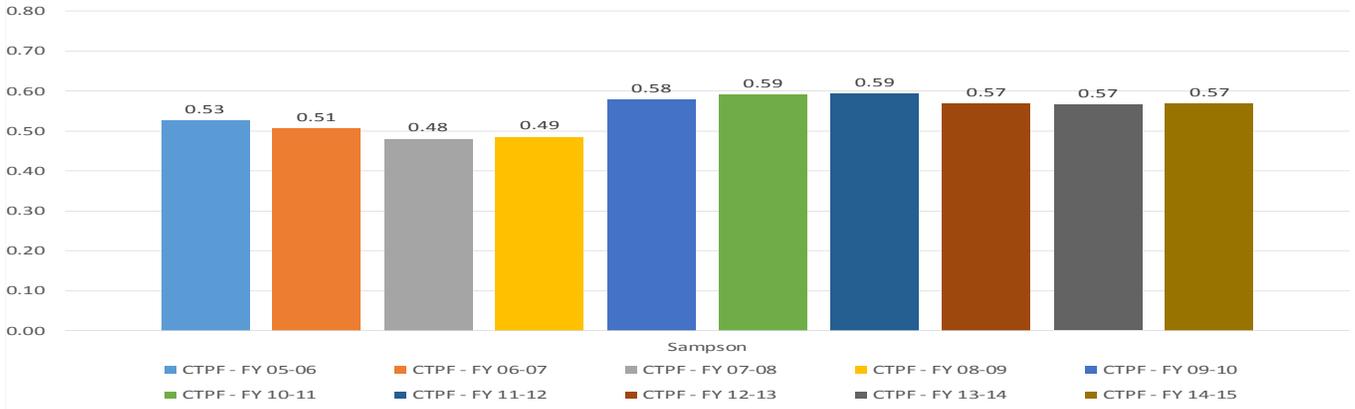
Robeson County - %MS
- State Level Analysis



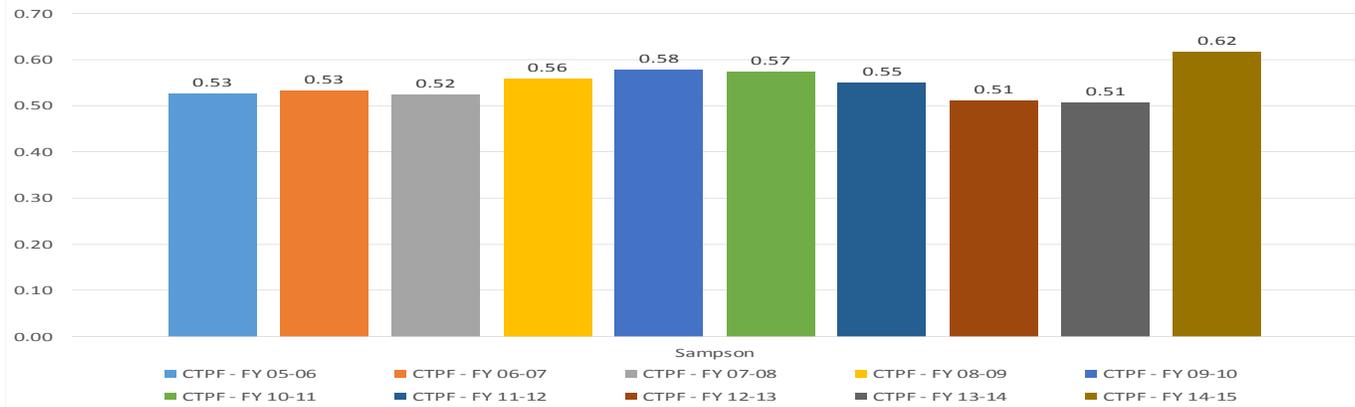
Robeson County - %MS
- District Level Analysis



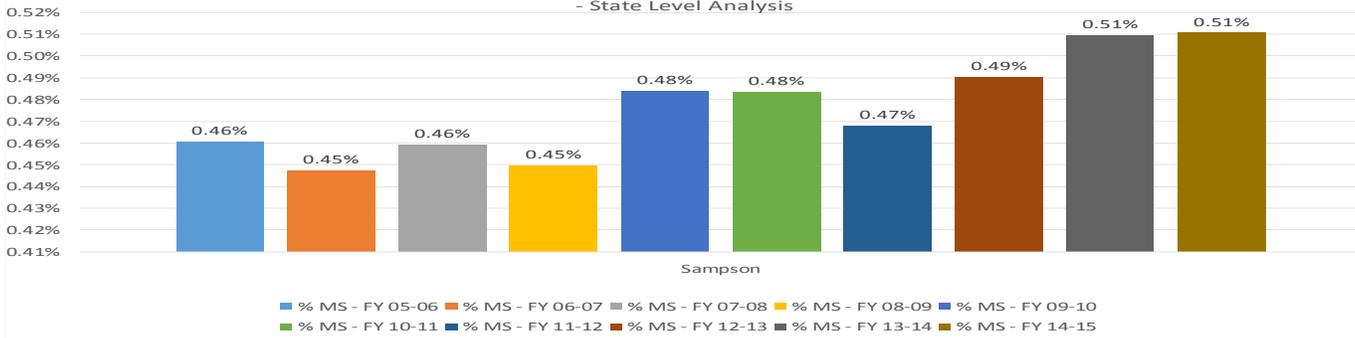
Sampson County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



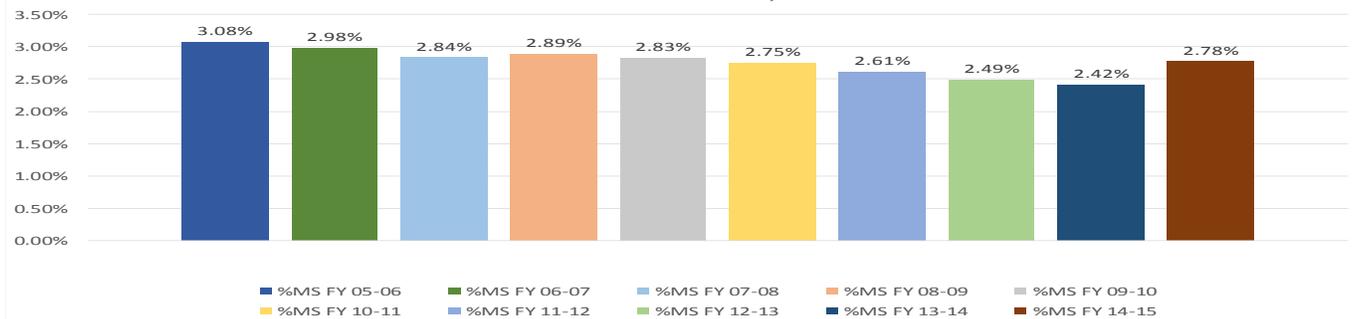
Sampson County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



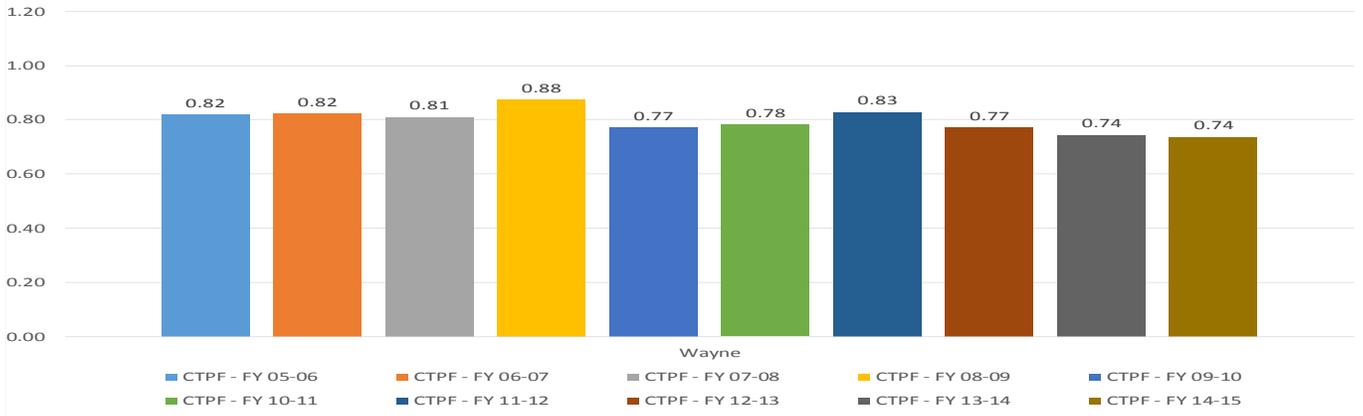
Sampson County - Percent Market Share - %MS
- State Level Analysis



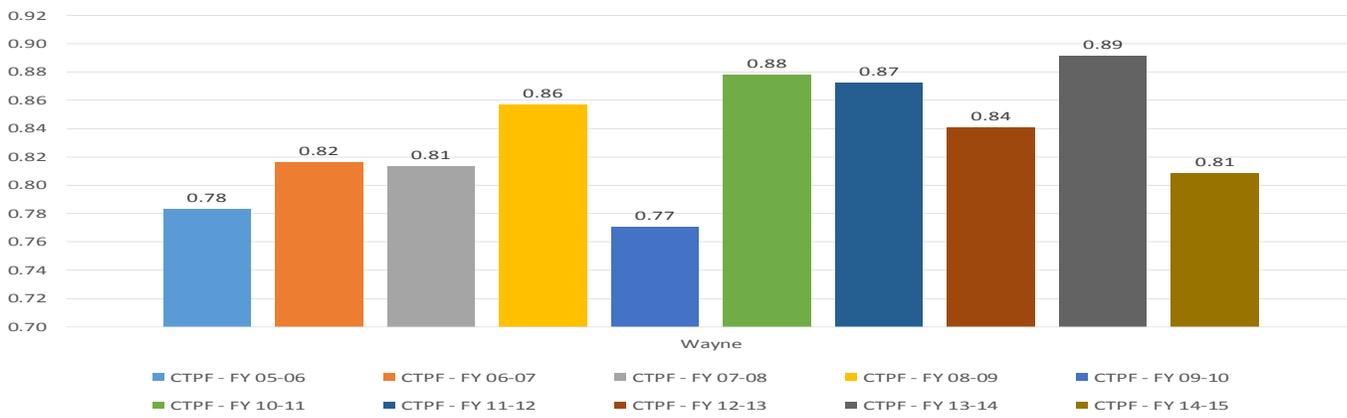
Sampson County - Percent Market Share - %MS
- District Level Analysis



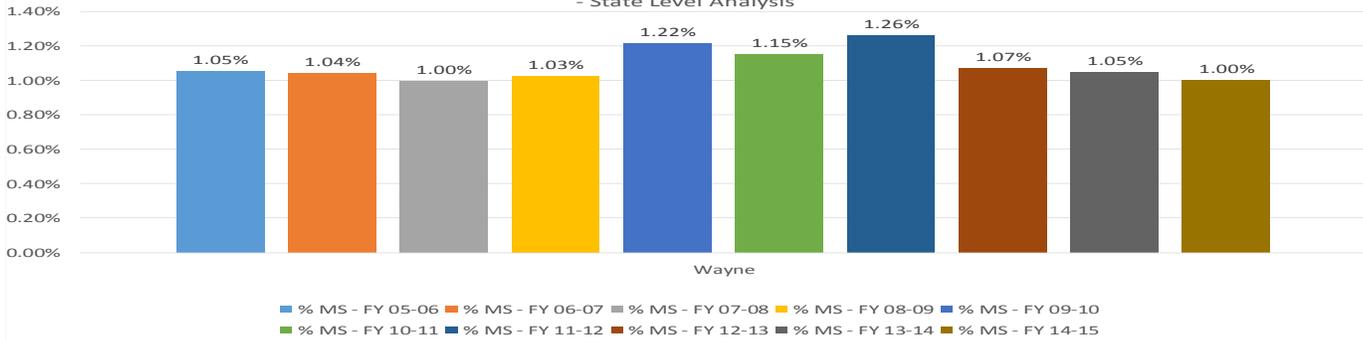
Wayne County Pull Factor
 - Southeast Extension District -
 (state level)
 - FY 05-06 to FY 14-15



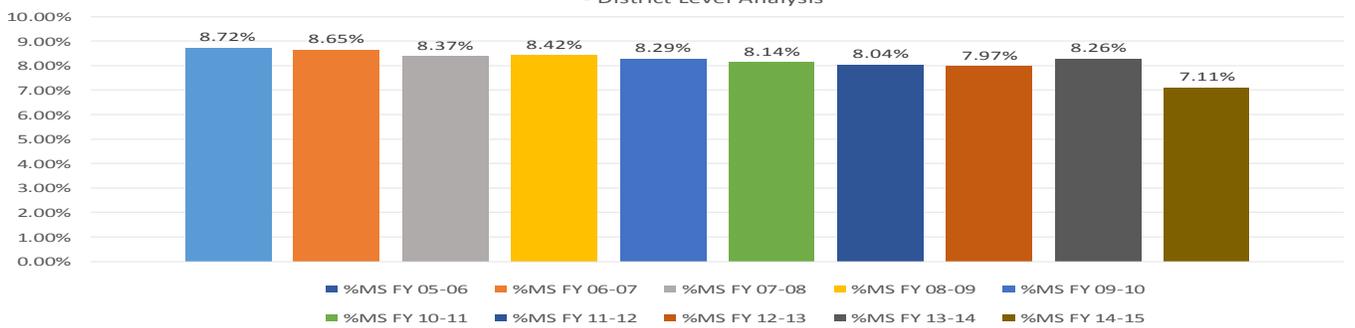
Wayne County - County Trade Pull Factor
 - (SE Extension District - district level)
 - FY 05-06 to FY 14-15



Wayne County - Percent Market Share - %MS
 - State Level Analysis



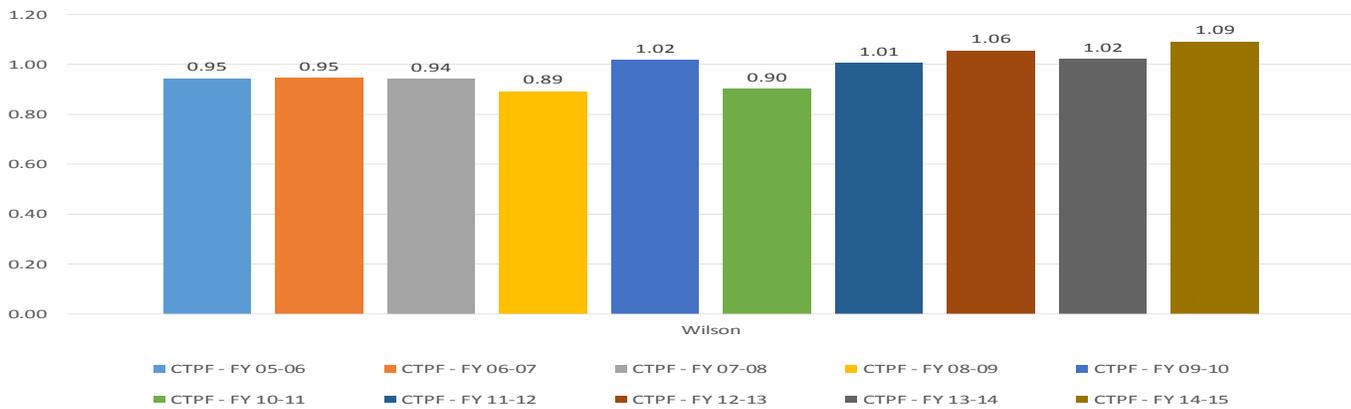
Wayne County - Percent Market Share - %MS
 - District Level Analysis



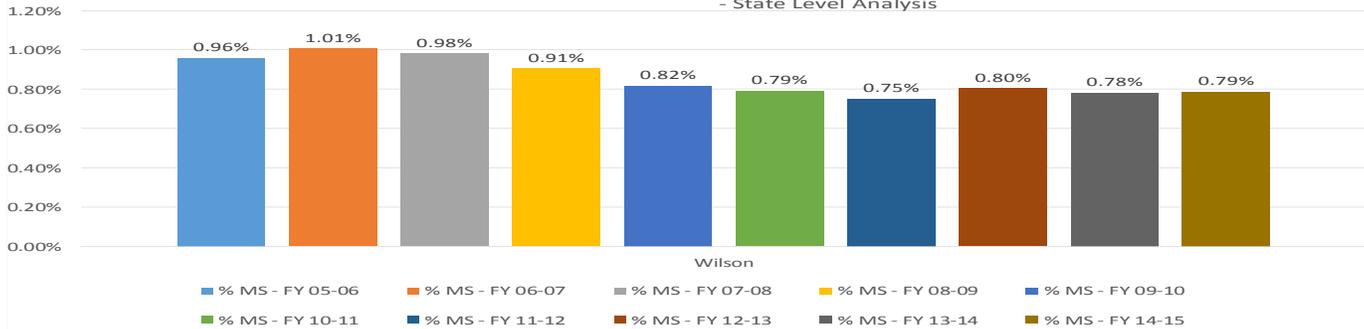
Wilson County Pull Factor
(based on per capita sales tax collections) - FY 05-06 to FY 14-15



Wilson County - County Trade Pull Factor - (district level analysis)
- FY 05-06 to FY 14-15



Wilson County - Percent Market Share - %MS
- State Level Analysis



Wilson County - Percent Market Share - %MS
- District Level Analysis

