Blue Ridge Parkway – Courtesy of Jackson County TDA

JACKSON COUNTY, NC COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

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Acknowledgments

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Approximately 30 business, government, and regional/state leaders were chosen by the Jackson County Office of Economic Development to assist in generating feedback and advice.

A special thanks also goes out to the Jackson County Business and Industry Committee for serving as the oversight body for this important endeavor.

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Executive Summary

Jackson County's purpose in seeking an updated economic development strategic plan is to continue to improve the quality of life for its citizens by building a robust and healthy economy that is both diversified and sustainable. Approximately 30 business, government, and regional/state leaders were chosen by the Jackson County Office of Economic Development to assist in generating feedback and advice throughout the planning process. In addition, the Business and Industry Advisory Committee played an important oversight role throughout the Comprehensive Economic Development Strategy (CEDS) process.

This economic development plan is not a one-time project, but rather a methodical and interactive strategy document that will guide the County throughout the decade. It represents the synthesis of research, conversations, data collected through various in-person and electronic means, and information derived from strategies that have been previously developed by Jackson County, the Southwestern Commission Regional Council of Government, and other municipalities and communities in Jackson County and Region A. Jackson County has experienced notable growth which will continue to create unique opportunities. As growth continues, the County will need to meet challenges around community needs like affordable housing, broadband and utility infrastructure, workforce development, and job creation. This CEDS will equip County leadership, regional partners, business owners, and residents with strategies and resources to tackle these issues and to ignite changes that lead to meaningful impacts.

Some of the key issues, trends, and feedback that were considered during this study included:

- **Affordable housing** – 52% of renters and 21% of homeowners in Jackson County have difficulty affording housing.

- **Workforce** – Focus groups were concerned about the inability to attract skilled trades workers or retain youth and talent.

- **Population increasing but aging** – The county population increased 7.8% since 2015, growing by 3,222, and is expected to increase by 4.1% between 2020 and 2025. The retirement age population is higher than normal in Jackson County. The national average for a comparable population is 12,919 people 55 or older, compared to 14,436 in Jackson County.

- **Industry mix** – Government is the largest sector, employing 4989 workers followed by Accommodation and Food Services (2,442 workers), Health Care and Social Assistance (2,101 workers), and Retail Trade (1,911). These four industry sectors provide over 70% of Jackson County's employment.

The plan that follows outlines initiatives for achieving economic development success. Because County resources are constrained by fiscal realities, stakeholders will need to collaborate to realize goals for business growth and diversification, additional investment, talent development, and economic sustainability.

The action initiatives outlined in this report are organized according to eight key goals:

> **Goal 1: Maintain a robust and sustainable tourism destination**
>
> **Goal 2: Build a workforce that will meet the needs of current and future employers**
>
> **Goal 3: Countywide high-speed broadband availability**
>
> **Goal 4: Create a marketing campaign for Jackson County to support existing business and attract new business**
>
> **Goal 5: Identify investment opportunities to address current and future critical economic needs**
>
> **Goal 6: Commit to becoming an entrepreneurial/small business capital**
>
> **Goal 7: Maintain a comprehensive economic development strategy**
>
> **Goal 8: Maintain and enhance the quality of life for citizens, tourists, and small business owners**

Each of these goals has a series of associated action initiatives. The following is a representative list of initiatives that were developed to support the eight goals:

- Research visitor lodging, retail needs, and creative placemaking; improve access to natural assets and parks and develop a sustainable tourism strategic plan.

- Establish a regional tourism brand identity; develop and implement a marketing campaign that drives tourism and supports existing businesses.

- Develop internships, job shadowing, facility tours, apprenticeships, and career days that are easily accessible, where applicable, for middle-school, high-school, and college students to recruit and retain a workforce in high-demand industries.

- Collaborate with employers to provide subsidized education, retention bonuses, and education-related loan forgiveness to incentivize employee recruitment and retention.

- Convene a new Digital Inclusion Committee to foster a collaborative discussion environment between ISPs, cell service providers, and local governments.

- Revisit the structure and policies within the Revolving Loan Fund that may be modified to enhance its impact, especially toward broadband-related priorities.

- Create a business and industry inventory to identify gaps and strategies to fill those gaps. Undertake a recruitment campaign. Identify targets, qualify leads, market the County, and actively recruit businesses, especially in emerging and/or high paying sectors.

- Seek funding from the Economic Development Administration to undertake a research-based regional supply chain study to understand opportunities for recruiting/building additional businesses. Plan and execute a marketing campaign that caters to opportunities identified in the supply chain study.

- Create cluster focus groups that convene regularly to discuss and develop strategies to address issues and emerging trends.

- Identify developable land in the county in connection with current/planned growth and current/planned infrastructure. Prioritize areas and create incentives for investment.

- Create a product development team that will proactively meet with property owners of strategic sites. Assess the owners' interest in promoting, leasing, or selling. Pursue public/private partnerships to ensure that property is available when the opportunity arises. Coordinate with local realtors and realtor associations.

- Create a small business and entrepreneurial hub in downtown Sylva to catalyze job creation and retention, provide free public wi-fi, and contain flexible and collaborative space for businesses, retail, entrepreneurs, education providers, and remote workers/telecommuters.

These initiatives and those that follow are steps to raise Jackson County's profile by marketing to tourists, new residents, investors, developers, and target industries. The authors stress the importance of reading the report in its entirety to understand the full context and meaning of the recommended goals and initiatives.

This plan is designed to be implemented over five years, but the County should build a yearly work plan to prioritize goals and implementation steps. By revisiting the plan, prioritizing initiatives, and taking annual action steps, this strategy document will remain relevant and will produce its intended significant impacts.

Blue Ridge Parkway – Courtesy of Jackson County TDA

Background and Objectives

Jackson County's purpose in seeking an updated economic development strategic plan is to continue to improve the quality of life for its citizens by building a robust and healthy economy that is both diversified and sustainable. This plan will guide the County and its strategic partners in achieving long-term economic growth and sustainability. The Jackson County Board of Commissioners recognizes that it is essential to think and act in a coordinated, efficient manner when undertaking strategic initiatives such as this one.

This Comprehensive Economic Development Strategy (CEDS) represents the synthesis of research, conversations, data collected through various in-person and electronic means, and information derived from strategies that have been previously developed by Jackson County, the Southwestern Commission Regional Council of Government, and other municipalities and communities in Jackson County and Region A.

This CEDS also emphasizes the County's existing plans—Jackson County's 2012 Comprehensive Economic Development Strategy, Jackson County Land Use Plan 2040, and the Southwestern Economic Development District's 2017 CEDS—and identifies actionable steps to strategically grow businesses, create jobs, increase economic investment, and build a collaborative network to expand economic opportunity and prosperity throughout the County.

The purpose of this CEDS is to build upon previous planning exercises, develop pathways for implementation, and harness the positive momentum that has been occurring in the County for years, not to repeat or redo previous work.

Effective economic development organizations need to identify and prioritize clear goals and develop actionable strategies for achieving them. This CEDS is an action-oriented document that outlines the high-level steps needed to improve economic and community vitality within Jackson County. The recommendations included in this CEDS directly align with and support the eight economic development goals outlined in the 2017 Comprehensive Plan, thereby leveraging the County's prior effort, and contributing to its future success. The action items are clear and concise by design and are complemented by straightforward corresponding narratives.

A detailed work plan will need to accompany a prioritized and phased implementation of recommendations from this document. Strategic economic development plans are living documents that must respond and adapt as the community grows and new opportunities appear on the horizon. Each year, progress against this plan should be assessed, and the goals and strategies realigned to reflect the progress being made.

Plan Guiding Principles

The County's economic development strategic plan brings together visions of County leaders, citizens, stakeholders, and economic development partners. This CEDS was based on two foundational elements, the County's vison statement and its economic development mission statement, as outlined in the Jackson County Land Use Plan 2040.

Vision Statement

"Jackson County honors its culture, its environment, and its communities, providing opportunities for its citizens to engage in efforts to create a sustainable County. Jackson County respects its heritage and natural resources while providing economic opportunities and quality housing for all its citizens. With an efficient government, Jackson County plans for and develops community facilities and infrastructure to meet the needs of its diverse population and businesses, as well as visitors. With a strong and vital economy, Jackson County offers services and employment opportunities that enable all citizens to live a healthy and productive life."[1]

Economic Development Mission Statement

"Economic development activities in Jackson County are focused on the improvement of economic condition, increased opportunities for improving wealth, and a betterment of the overall quality of life of the people of Jackson County. Business recruitment, retention and expansion, civil and social infrastructure, workforce development, and strategic marketing are the primary focuses of our Economic Development efforts."[1]
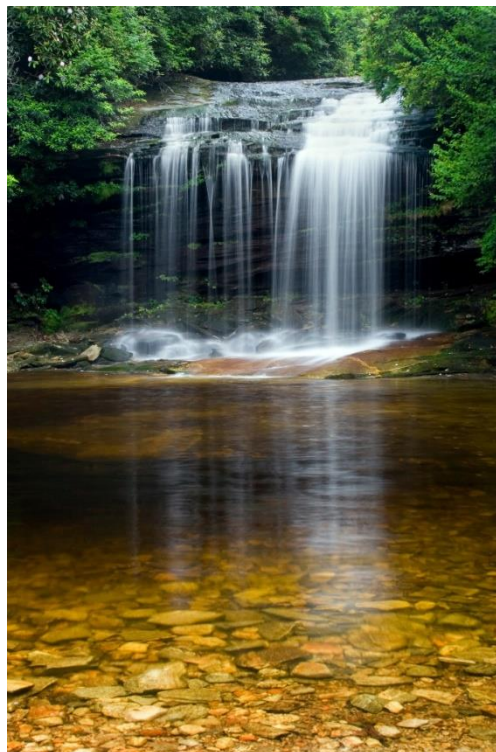
Cashiers – Courtesy of Jackson County TDA

Strategic Plan Initiatives

Approximately 30 business, government, and regional/state leaders were chosen by the Jackson County Office of Economic Development to assist in generating feedback and advice throughout the planning process. In addition, the Business and Industry Advisory Committee played an important oversight role in the CEDS process. Using written and spoken feedback, research, and information from existing plans, the following initiatives were developed to support the goals established in the Jackson County 2040 Land Use Plan.

Goal 1: Maintain a robust and sustainable tourism destination

As mentioned in the previous section, advice and feedback were derived from stakeholder engagement through focus-group conversations and SWOT and gap analyses. Stakeholders frequently emphasized outdoor-recreation and an active lifestyle as critical to the Jackson County identity. They described Jackson County as the "gateway to the far west" or the "center of western NC" and suggested creating an architectural feature that emphasizes those themes. They recommended increasing investments to improve river access, parks, picnic areas, biking paths and lanes, and outdoor recreation signage. Fishing on the County's numerous lakes, streams and rivers is noted as a primary driver of overnight visitation and day trips.

Stakeholders indicated that each Jackson County community could benefit from additional employers and a more diverse mix of retail, dining, accommodation, and beverage options to spur visitation and catalyze community and economic development. Several participants stressed the need for arts and crafts infrastructure and space. Further comments suggested that additional enhancements to the Tuckasegee River access areas could greatly improve the visitor experience, and that continuing to foster improved vehicular and pedestrian mobility in key locations along the Tuckasegee could mitigate ongoing congestion concerns.

The Jackson County Tourism Development Authority (TDA) tracks key tourism performance indicators, regularly provides updates to the Jackson County Board of Commissioners, and publishes information like monthly occupancy, average daily room rates, and revenue per available room on its website, www.discoverjacksonnc.com. The TDA recently completed a strategic plan and a visitor profile study in 2019 and utilizes data from Visit NC[3] to chart expenditures from domestic travel to Jackson County. The impacts of Covid-19 on overnight visitation were significant in Q1 and Q2 of 2020, yet have rebounded substantially to outpace previous forecasts for the remainder of the year. This fortuitous return of robust overnight stays will allow the TDA to continue to implement its strategic playbook as developed in 2019 with minimal disruptions.

Stakeholder engagement revealed a desire for a regional branding campaign that would highlight natural and built assets like the Great Smoky Mountains National Park (GSMNP), Harrah's Cherokee Casino, and various other destinations. Participants from the Business and Industry Advisory Committee and from our colleagues with the Eastern Band of Cherokee Indians commented that when searching online for the "Great Smoky Mountains," Tennessee-related results greatly outnumbered North Carolina's. Even though the GSMNP is shared equally by both states, Tennessee has benefitted from a regional marketing campaign and partnership that highlights several communities like Pigeon Forge, Gatlinburg, and Sevierville. In addition to the GSMNP, each Western North Carolina (WNC) county can

boast unique attractions and by working together on a regional marketing initiative, the region can spotlight features that span several counties and communities.

In September 2020, North Carolina State University announced the selection of Jackson, Swain, Macon, and Graham counties and the Eastern Band of Cherokee Indians (EBCI) for participation in the CREATE BRIDGES initiative, a program designed to build up rural economies.[4] According to the CREATE BRIDGES webpage,

> *"…businesses focused on retail, accommodations, tourism, and entertainment are important to the viability of rural communities and regions. These industries provide needed goods, services, and amenities to local residents and visitors and enhance the quality of life. They are also a major source of jobs and tax revenue in rural communities and often provide the first work experience for residents who move up the career path within these businesses or go on to work in other sectors."*

Currently, 35 community leaders from those counties form the steering committee for the initiative and are focused on building more sustainable and collaborative regional retail, accommodations, tourism, and entertainment businesses. Following a three-year planning and discovery initiative, the donor organization (Wal-Mart) will contribute funds towards selected initiatives.

The target market for a regional branding campaign could include visitors who utilize the Asheville Regional Airport. Passenger traffic increased by 43% from 2018 to 2019.[5] 2020 has been a challenging year, but a regional marketing campaign could target over 800,000 visitors annually. Funding for a regional branding study could derive from a variety of sources. For example, the Economic Development Administration's Economic Adjustment Assistance Program provides at least $100K for strategy and marketing assistance.[6] Also, the newly commenced CREATE BRIDGES project includes a retail and marketing study as one of its deliverables. A regional branding study might be a suitable project for faculty and students at Western Carolina University (WCU) and Southwestern Community College (SCC). There may be an opportunity to partner with the Outdoor Recreation Office at the Economic Development Partnership of NC[7], which is creating a regional marketing strategy with outdoor recreation organizations throughout Western NC.

Stakeholders indicated that Jackson County needs an event or conference center that could cater to medium-sized audiences, noting that Western Carolina University could be the primary catalyst for events that would bolster overnight stays, such as College-specific and regional conferences, and NCAA and Southern Conference athletic competitions. Similarly, the recent Jackson County Land Use Plan 2040 suggested that adding a sports complex and an indoor pool could attract visitors and generate incremental revenues associated with tourism, yet no specific analytics have been developed to justify either as a specific opportunity for TDA capital investment.

Bear Lake Preserve – Courtesy Jackson County TDA

Tourism accommodation, transportation, events, and related activities consume significant amounts of fuel, energy, and water as well as produce significant amounts of waste, all of which can impact the natural environment. Focus groups expressed concerns about the impacts of tourism and requested that the County consider measures to protect natural resources. It may be advisable for the Office of Economic Development (OED) to coordinate with the Jackson County TDA, and departments under the County manager's purview including Parks and Recreation, NC Cooperative Extension, and Soil and Water Conservation to develop communications, agreements, and processes that will help inform sustainable tourism policies and practices. For this strategic plan, 'sustainable tourism' refers to the consideration and mitigation of the negative impacts of tourism. In particular, the tourism industry needs to protect natural assets, minimize resources, and reduce its impacts while adjusting to increasing numbers of travelers and their requirements.

To maintain a robust and sustainable tourism destination, it is recommended that Jackson County pursue the following action initiatives.

Table 1 – Goal 1 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Evaluate the need for additional accommodations and conference facility inventory, to include product type, and most advantageous location.	Jackson County Office of Economic	Jackson County Tourism Development	Ongoing

Action Initiative	Lead Agency	Partners	Timeframe
	Development (OED)	Authority (TDA)	
Pursue development opportunities to create additional lodging capacity as identified.	OED	TDA	Ongoing
Identify opportunities to market accommodations to an array of visitor segments to increase occupancy tax revenues.	TDA	OED	Ongoing
Undertake a retail study to identify additional retail needs across the County.	OED	TDA, Mountain West Partnership (MWP), Western Carolina University (WCU), Southwestern Community College (SCC), Small Business Technology and Development Center (SBTDC), Small Business Center (SBC), Jackson County and Cashiers Chambers of Commerce (COCs)	short-term
Establish a regional tourism committee to foster collaborative discussion and planning surrounding tourism in the region.	OED, MWP	TDA, WCU, SCC, SBTDC, SBC, COCs	ongoing
Develop and implement a plan to drive tourism traffic to year-round activities.	TDA	OED	ongoing
Foster creative place- making and identification of strategies that reflect the culture of the region, establish a sense of place, and attract and connect visitors and residents to experiences that are unique to Jackson County.	OED	TDA, WCU, SCC, SBTDC, SBC, COCs	mid-term

Action Initiative	Lead Agency	Partners	Timeframe
Encourage and actively support capital projects to improve river access, parks, picnic areas, biking paths and lanes, outdoor recreation signage, and regional linkages.	OED	TDA, WCU, SCC, SBTDC, SBC, COCs, Southwestern Commission Regional Council of Government (SWC)	mid-term
Work to attract and enhance family-oriented venues throughout Jackson County, to promote quality of place that appeals to residents and visitors alike.	OED	TDA, Jackson County COC	mid-term
Work with local municipalities and business owners to address seasonal opportunities for longer business hours (nights/weekends/holidays) to attract more traffic downtown	OED	TDA, WCU, SCC, SBTDC, SBC, COCs, SWC	mid-term
Study and develop eco-tourism attractions and services with the Eastern Band of Cherokee Indians (EBCI) and other regional partners. Develop itinerary models and promotional materials. Place itineraries strategically in regional locations as well as on appropriate electronic websites.	OED, MWP	TDA, EBCI, surrounding Counties, SWC	mid-term
Develop an environmentally sustainable tourism strategic plan and conduct an environmental conservation awareness campaign	OED	TDA, WCU, SCC, SBTDC, SBC, COCs, SWC	mid-term
The Director of Economic Development will work with the proposed Workforce Development Task Force to identify support strategies for the hospitality industry	OED	TDA, WCU, SCC, SBTDC, SBC, COCs, SWC	mid-term

Southwestern Community College – Courtesy of SCC via Jackson County TDA

Goal 2: Build a workforce that will meet the needs of current and future employers

Stakeholders indicated several existing strengths in Jackson County's workforce development efforts such as the collaboration between economic and community development, higher-education, and local government organizations. While the workforce was noted as a general weakness, participants noted that the County is home to high-quality education providers and many highly skilled second-home residents and retirees.

Stakeholders identified challenges like the inability to attract skilled trades workers or retain youth and talent. It is true that the population growth of people ages 25–34 and 35–44 from 2016–2018 is -3.9% and 0.2% respectively, but this is a general trend for rural counties nationwide. However, employment opportunities are driving a net positive migration into Jackson County. In 2017, residents left the county daily for 7,132 jobs, but non-residents migrated into the county for 8,703 jobs, creating a net positive flow of 1,571 jobs.[9] While this is a positive sign, it could also be indicative of resources like housing, broadband, other infrastructure, and amenities that may be available in neighboring counties but insufficient in Jackson County.

To take advantage of identified opportunities and address challenges, the County should leverage existing partnerships to develop programs to meet workforce needs. The Southwestern Commission Workforce Development Board is a critical community asset that is addressing workforce challenges. It is

empowered to make important decisions regarding funding and governance of employment and training services for individuals and businesses.

The County should also identify industry clusters that leverage the talents, aspirations, and assets of the County. One potential industry target is outdoor recreation, which is a priority across the region. There are over 80 outdoor companies in NC's 11th Congressional District which covers 17 western counties including Jackson County. Outdoor recreation in the region generates $1.64 billion annually in consumer spending.[10] Given the opportunities and market size, partners from WCU and SCC should consider developing degree programs, certificates, and training that support the outdoor recreation industry. Additionally, partnerships should be created and strengthened with the North Carolina Outdoor Recreation Industry Office at EDPNC[7], Mountain Bizworks[11], and the Waypoint Accelerator[12].

To build a workforce that will meet the needs of current and future employers, it is recommended that Jackson County pursue the following action initiatives.

Table 2 – Goal 2 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Develop facility tours, job-shadowing, internships, and apprenticeships that are easily accessible for high-school and higher-education students and help recruit and retain a workforce in high-demand industries.	OED	SWC, WCU, SCC, MWP, COCs	short-term
Focus on early interventions to the workforce pipeline and target elementary and middle school students with positive career messaging and training about skilled trades, a growth mindset, and entrepreneurial thinking that will inspire innovation and creativity.	OED	SWC, WCU, SCC, MWP, Jackson County Public School (JCPS)	short-term
Collaborate with employers to provide subsidized education, retention bonuses, and education-related loan forgiveness to incentivize employee recruitment and retention.	OED	SWC, WCU, SCC, MWP, COCs	short-term
Invite Family Forward NC (https://familyforwardnc.com/) to collaborate with county employers to remove obstacles from parents who wish to work but are constrained because of inadequate childcare.	OED, COCs	SWC, WCU, SCC, MWP, COCs	short-term
Work with WCU to develop educational programs/certificates focused on outdoor recreation and entrepreneurship and that produce entrepreneurs/leaders who can be retained in the county and have a mindset to create their own opportunity.	OED	WCU, Mountain BizWorks (MBW), NC Outdoor Recreation Office	mid-term
Create transit or ridesharing opportunities to help employees who may not have transportation. For example, hospitality businesses in Cashiers	OED	SWC, WCU, SCC, MWP, COCs, resorts,	mid-term

Action Initiative	Lead Agency	Partners	Timeframe
traditionally struggle with an adequate workforce because of their distance from population centers. To address that challenge, employers could collaborate to provide round-trip transportation to residents in other parts of the County, including students at WCU and SCC.		hospitality and tourism businesses, TDA, Jackson County Transit	
Establish programs to educate middle schoolers about jobs in trades and the service industry. Internships, job shadowing, facility tours, apprenticeships, and career days were suggested as ways to educate youth about future jobs including ones in hospitality and tourism.	OED	SWC, WCU, SCC, MWP, COCs, resorts, hospitality and tourism businesses, TDA	mid-term
Work with higher education providers to expand the dual enrollment options for County high school students.	OED	TDA, WCU, SCC, SBTDC, SBC, COCs, SWC	mid-term

Goal 3: Countywide high-speed broadband availability

Stakeholders cited broadband as one of the primary challenges in Jackson County's economic and community development future. It is a critical resource and limited broadband restricts productivity, competitive entrepreneurship, education, healthcare, and economic mobility.[13] Lack of broadband disproportionately impacts rural areas like Jackson County and hampers efforts to recruit and retain a workforce, businesses, and investment. According to a 2018 report by the Federal Communications Commission, 80% of the 24 million American households that do not have reliable, affordable high-speed internet reside in rural areas.

The region is gradually adding internet capacity. The Mountain West Partnership (MWP) identified broadband as a critical economic development issue for the region.[14] In 2017, the MWP hosted a broadband summit for regional stakeholders and issued a survey to determine unmet regional broadband demand. In 2019, the group worked together to conduct an asset inventory in the region that could be used to expand service to underserved areas. From these planning exercises and a collaborative effort with Western Carolina University, broadband has expanded to over 8,000 underserved households. The EBCI recently acquired Cherokee Cablevision which will expand fiber optic internet infrastructure across the Qualla Boundary and region.[15] The Southwestern Commission recently distributed Growing Rural Economies with Access to Technology (GREAT) grants in Graham and Swain counties and one Appalachian Regional Commission (ARC) broadband grant in Haywood County.

Given the need for broadband and the recent regional progress in expanding infrastructure, Jackson County can take several steps to expedite progress. The WNC Broadband Project comprises a broadband advocacy group headquartered in Buncombe County but represents roughly twenty western NC counties.

It has listed recommendations[16] that communities like Jackson County can adopt, such as:

- Assign staff to acquire expertise and to be liaisons to broadband advocates and providers.
- Create a broadband committee of local citizens and business leaders that will partner with other organizations (cities, schools, counties, regional planning groups) to advocate for broadband funding and needed policy changes.
- Include broadband in master plans for future development.
- Require developers to include conduit for fiber when constructing apartments, homes, businesses, and recreational sites.
- Require the Register of Deeds to provide broadband information in property assessment and taxation information. Put that information in the county GIS database as public information.
- Survey area residents about their wants, needs, and satisfaction with present services to help governments and providers identify infrastructure and access deficiencies and opportunities.
- Conduct community asset analysis (dark fiber, conduits, open space, towers, tall buildings, etc.) to identify opportunities for governments to partner with providers.
- Adopt broadband-friendly practices such as low-cost rapid permitting, low-cost rental of government assets such as towers, and "dig once" policies that will reduce the cost for providers and increase opportunities for hard-to-reach areas of the community.
- Once surveys and asset inventories are completed, meet with providers to create positive business cases to attract additional investment through grants, revenue sharing, and/or aggregating demand.
- Create new programs such as Wi-Fi "hotspots" in community centers, public parks, or other public settings.

To establish countywide high-speed broadband availability, it is recommended that Jackson County pursue the following action initiatives.

Table 3 – Goal 3 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Convene a new Digital Inclusion Committee to further the progress of previous groups and initiatives. Foster a collaborative discussion environment between ISPs, cell service providers and local governments.	OED	Jackson County Planning Department (JCPD)	short-term
Review, discuss, prioritize, and implement recommendations outlined in the "WNC Broadband Project	Actions We Can Take" that would be appropriate for Jackson County.	OED	JCPD, SWC	mid-term
Continue to track legislative trends, research best practices, and seek grant funding opportunities. Evaluate the use of lobbyists to elevate attention to rural WNC broadband issues.	OED	JCPD, NC Rural Center, SWC, MWP	short-term
Ensure that the County has a complete inventory of current broadband infrastructure and a prioritized list of needs to plan healthy economic development for the County.	OED	JCPD, SWC, NC Division of IT Office	short-term

Action Initiative	Lead Agency	Partners	Timeframe
Create an accurate broadband map and dataset so that resources can be dedicated to the high-need areas of the County.			
Evaluate how funds from Jackson County's Revolving Loan Fund can be redirected toward broadband-related priorities.	OED	JCPD, JC Commissioners, SWC	mid-term

Courtesy of Jackson County TDA

Goal 4: Create a marketing campaign for Jackson County to support existing business and attract new business

Economic development in Jackson County depends on three main elements: new business recruitment, business retention and expansion (BRE), and small business/entrepreneurship. Stakeholders mentioned topography and limited available developable land as challenges to new industrial recruitment. In addition, Jackson County's distance from the interstate highway system restricts large scale logistics. All these factors place the county at a competitive disadvantage for industrial recruitment. Additionally, the lack of manufacturing and warehouse/distribution operations, which are typically large employers, negatively impacts BRE.

With those challenges in mind, Jackson County is focused on establishing a robust ecosystem of target industry clusters that produce possibilities for a thriving economy. Target clusters reflect and define businesses and industries that make sense for a local or regional economy. They also provide a more focused approach to conducting outreach, investing resources, and marketing activities. The previous, 2012 CEDS, selected five target industry clusters.

1. Education
2. Gaming
3. Healthcare
4. Tourism (hospitality, food/beverage, arts/entertainment)
5. Retirement

Recent focus group feedback and market analysis suggested that Government could be added as a sixth cluster. Additional consideration was also given to potential competitive advantages and available resources. Government and higher education are backbone industries to the region. However, it will be challenging for the county to extract additional economic impact from these sectors. First, COVID-19 is expected to negatively impact government revenues in the next few years and higher-education is expected to contract.[17]

There is opportunity to drive growth in the remaining four clusters and it is recommended that the County identify and coordinate resources, increase marketing, and support sectors like Tourism, Small Business / Entrepreneurship, Outdoor Recreation, and Healthcare. Additionally, the County should develop strategies to attract aspirational sectors like value-added food, information technology, and tier-three automotive and aerospace manufacturing industry sectors. These sectors could be attracted by the higher-education resources, talent, and quality of life.

Some of the small business resources that support this goal derive from the presence of the Small Business Center at Southwestern Community College and the WCU Small Business and Technology Development Center. These two organizations support and provide programming and training to agriculture, food, and manufacturing businesses. They offer extensive entrepreneurship resources. WCU offers engineering technology programs and the Rapid Center provides advanced manufacturing assistance to regional businesses.

The seven western counties and the EBCI have a long history of working together through the Mountain West Partnership (MWP). Serving as the regional economic development organization, the MWP has a track record of successfully engaging regional industries. In 2019, it conducted roundtable listening sessions with key sectors, including one with the tourism and hospitality industry in which economic developers met with over 20 business owners from the region to discuss ways to grow and support tourism across the region. Regional economic developers understand that strong hospitality, tourism, and outdoor recreation amenities are important to mountain residents' quality of life. These sectors also influence the recruitment of new businesses and workers to the region in other fields such as healthcare and education.

The MWP's support of outdoor recreation has been notable. In support of this industry sector, in 2019, the MWP sent a regional representative to the summer Outdoor Retailer[18] in Denver, CO, and sponsored the Outdoor Economy Conference[19]. Beyond the region, outdoor enthusiasts in the southeastern US note that WCU has been named the Top Adventure College by Blue Ridge Outdoors magazine for five years[20]. The magazine's editors stated that WCU supports "…regional outdoors-based travel, tourism, and industry, and the entities that are destinations for residents and visitors alike."

To create a marketing campaign for Jackson County to support existing business and attract new business, it is recommended that Jackson County pursue the following action initiatives.

Table 4 – Goal 4 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Establish a regional tourism brand/identity and develop and implement a marketing campaign that drives tourism and supports existing businesses.	OED	JCPD, TDA	mid-term

Action Initiative	Lead Agency	Partners	Timeframe
Collaborate with regional partners to undertake a research-based regional supply chain study to map what exists and discover what type and quantity of freight is transported through the region. This information can be used to understand opportunities for recruiting/building additional businesses. Plan and execute a marketing campaign that caters to opportunities identified in the supply chain study. Seek funding from EDA to support this effort.	OED	SWC, WCU, SCC, MWP, COCs, EDPNC	mid-term
Perform a market analysis of Jackson County's retail needs and execute a marketing campaign that caters to identified targets.	OED	SWC, WCU, SCC, MWP, COCs, TDA	mid-term
Study and develop strategies to attract value-added food and agriculture businesses.	OED	SWC, SBC, MWP, COCs	mid-term
Refresh the EDC website to promote new product opportunities. Develop a plan to ensure the website stays current (dated 2015). Place a high priority on expanding the economic development section of the County's website	OED	JCPD	short-term
Maintain an up-to-date searchable on-line database of available buildings and sites.	OED	JCPD	short-term
Conduct an annual business climate study to identify business challenges or competitive advantages regarding regulation, permitting processes, infrastructure, workforce, and related issues.	OED	JCPD, COCs, SBC, SBTDC	mid-term
Reevaluate County incentive policies to ensure competitiveness.	OED	JCPD, COCs, SBC, SBTDC	mid-term
Increase the health care industry capacity. Partner with the healthcare providers to assess the need for supplemental / wrap around services and amenities for employees, patients, and visitors to healthcare facilities. Plan and execute a recruitment campaign that targets those types of service providers.	OED	Harris Regional Hospital	mid-term
Revisit the structure and policies within the Revolving Loan Fund that may be modified to enhance its relevance compared to traditional bank financing.	OED	SBTDC, SBC	short-term
Create cluster focus groups that convene regularly to discuss and develop strategies to address issues and emerging trends.	OED	SBTDC, SBC	short-term

Goal 5: Identify investment opportunities to address current and future critical economic needs

Focus groups and other stakeholders cited the lack of affordable and developable land and limited housing options as key challenges to Jackson County's economic and community development. These issues were raised in every stakeholder meeting and are priorities for several entities including the MWP. The Jackson County Land Use Plan 2040 and the Jackson County Housing Study of August 2019 both emphasized the critical need for affordable and developable land. Understanding that there are no easy solutions and with topographical challenges as well as market pressures on land prices, some moderate initiatives could produce momentum for public-private partnerships to experience success in providing diverse and affordable housing.

Affordable housing in this context can also be described as workforce housing that is affordable for service industry employees, teachers, public sector employees, etc. New residential development will be dependent on the private sector, so it is recommended that the Jackson County Office of Economic Development (OED) creates a housing task force with representatives from private developers, builders of all sizes, the banking community, and government. In addition, Jackson County could pursue actions like forming a memorandum of understanding with residential and non-residential landowners that permits the OED to market their property to developers under certain conditions. Some of the opportunities that were suggested by focus groups included:

- Promoting mixed-use development projects
- Repurposing vacant building spaces in downtown Sylva for residential spaces above commercial
- Outreach to landowners who may be willing to commit to reduced land sales prices in exchange for design input, naming rights, philanthropy
- Identifying publicly owned land that could be sold at below market rates to incentivize housing development
- Through a public-private partnership, obtain CDBG-I funds for water and sewer improvements to further reduce costs of development
- Adopt land use policies that encourage housing density to maximize land use while creating attractive and functional communities. Neo traditional design is complementary to this vision.
- Apply for the first-time homebuyer down payment assistance from NCHFA
- Develop a program whereby municipalities or the county waives development and permit fees to lower the cost of development. For example, the amount is then attached as a lien in the second position and is repaid out of proceeds if the homeowner sells in the first five years. One-fifth of the total is then reduced by 20% each year 5-10.
- Look at infill housing options on vacant lots.

The (OED) collaborates with the Jackson County Planning Department to identify sites that are amenable to real-estate development. It also partners with regional partners and leverages existing resources like the MountainWest Partnership. In 2019, the MWP commissioned a housing study to assess the availability of affordable and workforce housing in the region. The results of the study and further discussions across the region led to the formation of the Southwestern NC HOME Consortium[21] which comprises all Region A counties and makes $650K available for housing projects. Funds can be used for activities such as land purchases, rental assistance, construction, and down payment assistance.

To position the County for reserving land for economic development purposes, it is recommended that Jackson County pursue the following action initiatives.

Table 5 – Goal 5 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Conduct planning analysis that utilizes land use planning techniques to identify developable land in the county in connection with current/planned growth and current/planned infrastructure. Identify the highest and best use for parcels and prioritize areas for investment. Create incentives to drive investment in those areas.	OED	JCPD	mid-term
Evaluate adequacy of all utility services – water, sewer, electricity, natural gas, and broadband – to support growth and development in target areas. Drive county-wide planning for long-term infrastructure capacity and service.	OED	JCPD	mid-term
Create a product development team that will: Proactively meet one on one with property owners of strategic sites to discuss the property status and the desire to increase commercial and business activity in that area. Assess the property owners' interest in promoting and making the property available for lease or sale. Pursue public / private partnerships with these landowners and put control in place for land/buildings to ensure that they are available when the opportunity arises. Coordinate with local realtors and realtor associations.	OED	JCPD, residential and commercial realtors/brokers	short-term
Evaluate public / private partnership opportunities to create workforce housing.	OED	JCPD, WCU, SCC, Harris Regional Hospital, JC Public Schools (JCPS)	short-term
Explore opportunities with the Federal Housing Finance Agency. Look for opportunities in the Cullowhee Low- and Moderate-Income areas to leverage CDBG Neighborhood Revitalization funds for housing.	OED	JCPD, WCU, SCC, Harris Regional Hospital, JC Public Schools (JCPS), Cullowhee Revitalization (Curve)	mid-term

Action Initiative	Lead Agency	Partners	Timeframe
Upon completion of the regional supply chain mapping study outlined in goal 4, identify opportunities for the County to invest in real estate that would cater to those opportunities.	OED	JCPD, WCU, SCC, Harris Regional Hospital, JC Public Schools (JCPS)	mid-term
Support the development and marketing of shovel-ready and certified sites for business growth. Identify, develop, and market real estate products that are attractive to businesses and industries of varying sizes.	OED	JCPD	mid-term
Develop and encourage partnerships with experienced developers. Directly market parcels to developers.	OED	JCPD	mid-term
Offer incentives or land to developers to build workforce housing and/or mixed-use development.	OED	JCPD, WCU, SCC, Harris Regional Hospital, JC Public Schools (JCPS)	short-term
Engage and maintain partnerships with the Millennial Campus and the EBCI's Land Bank	OED	JCPD, WCU, EBCI	short-term

WCU – Courtesy of Western Carolina University via Jackson County TDA

Goal 6: Commit to becoming an entrepreneurial/small business capital

Stakeholders recommended that Jackson County should create a small business and entrepreneurial hub in downtown Sylva to catalyze job creation and retention. This location would make sense because Sylva is the population center of the County and, roughly speaking, the geographic center of Western NC.

Supporting entrepreneurship and startups will be increasingly important given the national difficulties recruiting businesses to rural areas and the recent pandemic's negative impact on existing firms. Employment losses are even more pervasive in hospitality and tourism businesses which employ approximately 30% of the workforce. Stakeholders cited collaboration as an important strength, and it will be vital to creating a hub since multiple organizations will have to work together. Several small business support organizations could co-locate in the hub to provide customers with an array of easily accessible services in just one location.

High-speed broadband access would be critical for tenants and would enable the advantages of e-commerce for entrepreneurs and small businesses. Ideally, the hub would provide free public wi-fi throughout downtown Sylva. This would help close the "education gap" for students who lack broadband at home and would deliver wi-fi to existing downtown businesses and organizations that may lack it. Besides, downtown wi-fi would enhance the tourist experience which increasingly depends on stable internet access.

A hub would offer business services from an array of co-located small-business support organizations. Tenants like the following could provide business and entrepreneurial support, workshops, education, and training.

- Mountain BizWorks
- WCU SBTDC
- WCU Office of Economic Development and Regional Partnerships
- Pinnacle Enterprise Angel fund
- HIGHTS Inc (Helping Inspire Gifts of Hope Trust and Service)
- SCC SBC
- WCU Educational Outreach and Continuing Education
- WCU Corporation of Entrepreneurship and Innovation

Many of the tenants and partners mentioned above have considerable experience supporting entrepreneurs through formal programs, counseling, coaching, and mentoring. For example, Mountain BizWorks manages the ScaleUp WNC program, the Waypoint Accelerator, the Alpine Class, and other programs focused on sustaining a strong entrepreneurial ecosystem. The SBTDC offers the Taking the Leap program and organizes an annual outdoor recreation pitch event in Asheville, which attracts over 150 attendees. The SBC has a long history of supporting entrepreneurs and offers business planning, legal, franchising, and cybersecurity assistance directly geared to entrepreneurs and startups.

The hub could provide small business clients and entrepreneurs with the following types of free or low-cost assistance:

- IT capabilities
- Mentoring, coaching, and advising
- Lending and access to capital
- Business, succession, and strategic planning
- Marketing and customer acquisition
- Leadership development
- Operational, logistics, human resource, and financial management

- Permitting and regulatory guidance
- Investor recruitment
- Product prototyping
- Market research
- Legal advice
- Entrepreneurship training
- Accounting
- Legal advice

A hub could streamline collaboration among students, faculty, and resources from separate regional higher education institutions. Because of the central location, visibility, and accessibility, regional higher-education resources will be more readily available to Jackson County's entrepreneurs and businesses. WCU has a student-run entrepreneurship club called EPIC Innovation that could be a key partner in a hub project. The hub could provide a collaborative workspace for regional higher-ed institutions, which does not exist now. The hub could be an ideal location to host community entrepreneurship and networking activities like pitch events, start-up weekends, talent jams, startup expos, and speakers.

From 2006-2016, annual growth in the global flexible workspace market averaged 13%.[22] Between 2009-2016, the flexible workspace market grew by more than 20% and 84% of corporate firms believe this trend is permanent.[22] Recent estimates suggest that by 2030, around a third of all corporate workspace will be flexible.[23]

> *"Flexibility is driving a new, location-agnostic blend of work and personal time that's rapidly becoming the established norm. Already, less than 20% of adults want to work a traditional 9 to 5 day, and 60% see a convenient work location as a key component of a good job."[23]*

The hub could be a natural option for businesses that desire temporary meeting or office space for their employees. This could make Jackson County a desirable location for telecommuting and remote work. The hub could offer client memberships that include a range of offices, hot desks, collaborative and drop-in space, and office amenities. The Hub could also contain a meeting space that accommodates groups of 20-30 people to help address the few convenient meeting spaces in the county.

The hub could include retail display space to make up for the loss in downtown Sylva. Pop-up retail spaces allow businesses to inexpensively test the waters of physical retail before making a large investment and can help businesses interact directly with customers, improve product development, and refine their value proposition. [24] Even though the hub's high-speed internet and other resources could catalyze e-commerce, only 12% of U.S. retail sales happen online so creating a "bricks and mortar" business is still important.[25]

Lastly, the hub could be a source of flexible space for economic development recruitment and/or the site of an incubator. Some possible areas of focus include marketing, value-added food and agriculture, or gear design and manufacturing. If the hub project progresses, organizers should seek advice and best

practices from entrepreneurship, incubator, and co-working organizations like RaleighFounded (formerly HQ Raleigh), Center of Rural Innovation, Hatch AVL, and Venture Asheville. The Nussbaum Center for Entrepreneurship, Venture Asheboro, the Thomas Family Center at UNC Pembroke, and UNCW's Center for Innovation and Entrepreneurship are also excellent models of how to create and operationalize a small business/entrepreneurship hub.

To commit to becoming an entrepreneurial/small business capital, it is recommended that Jackson County pursue the following action initiatives.

Table 6 – Goal 6 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Develop a plan that focuses on retaining small businesses. This plan would include regular discussions and visits with small business owners; assistance with succession planning; and alignment of business support resources with community needs.	OED	WCU, SCC, SBTDC, SBC, MBW	mid-term
Engage with the Chambers of Commerce and local business owners to create a marketing plan to promote small businesses in Jackson County and "buy local."	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	short-term
Create a small business and entrepreneurial hub in downtown Sylva to catalyze job creation and retention	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	mid-term
Engage and recruit investing networks and crowdfunding	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	short-term
Create an inventory of existing businesses in the County. Categorize by industry, identify gaps, strategize opportunities to fill those gaps, and undertake a recruitment campaign. Identify targets, qualify leads, market, and actively recruit businesses, especially in emerging sectors that create quality and good paying jobs. (Also supports goal 4)	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	mid-term
Develop and provide additional grants, incentives, and industry specific support to attract companies within target industries. Proactively make businesses aware of funding sources. (Also supports goal 4)	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	mid-term
Coordinate efforts with WCU and SCC to develop a comprehensive entrepreneurial resources and programs designed to attract new businesses	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	mid-term
Collaborate with area chambers of commerce to identify and promote entrepreneurial success stories	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	short-term

Action Initiative	Lead Agency	Partners	Timeframe
Proactively educate businesses about funding opportunities (local, state, federal, private).	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	short-term
Update the OED website to serve as a resource portal for information on all of the resources available to small businesses/entrepreneurs	OED	COCs, WCU, SCC, SBTDC, SBC, MBW	short-term

Goal 7: Maintain a comprehensive economic development strategy.

The County has demonstrated its commitment to maintaining a comprehensive economic development strategy (CEDS) through the creation of the initial plan and the further elaboration of the plan during the Jackson County Land Use Plan 2040. It will be important for the County to develop a detailed workplan that supports implementation of the action initiatives outlined in this revised CEDS. The detailed plan should:

- Review CEDS progress with county commissioners twice per year with updates reported annually.
- Be realistic and attainable.
- Prioritize quick wins.
- Establish key performance indicators that measure plan progress and results; establish current baseline measurements and set targets for improved performance.

This CEDS is rooted in action-oriented behaviors that are comprehensive in scope and potentially require coordination from many partners. As such, the County will likely need additional staff to help carry out the recommendations set forth in this plan and will need to budget for additional resources and personnel. The County will need to evaluate the appropriateness of the operating budget.

Finally, the County should create an annual status update on the performance of the action items and revisit its CEDS every 5 years.

Goal 8: Maintain and enhance quality of life for citizens, tourists, and small business owners.

Stakeholders were clear about maintaining and enhancing community quality of life by protecting the County from natural resource degradation, traffic, congestion, and crime. Some of the County strengths that were cited included the following:

- Vibrant, walkable downtowns
- Progressive, growing hospital and health care system
- Low crime, great place to raise family
- Ample outdoor recreation assets

To protect these benefits, stakeholders suggested the following actions:

- develop a long-term water resources management strategy
- create a mixed-use real-estate development
- improve river access
- add bike paths and access for alternative transportation

As found in the in the Jackson County Land Use Plan 2040, it is recommended that Jackson County pursue the following action initiatives.

Table 7 – Goal 8 Action Initiatives & Timeframes

Action Initiative	Lead Agency	Partners	Timeframe
Maintain partnerships with the municipalities in the County.	OED	County municipalities	mid-term
Coordinate with the municipalities regarding land use policies and regulations where feasible.	OED	County municipalities	short-term
Expand awareness of the citizens academy for future elected officials and interested citizens	OED	TWSA, JCPS, SWC, County municipalities	mid-term
Partner with the municipalities and EBCI to balance economic development with environmental stewardship	OED	EBCI, JCPD, County municipalities	short-term
Develop quality housing options for the County's workforce	OED	JCPD, WCU, SCC, Harris Regional Hospital, JC Public Schools (JCPS)	mid-term

Dillsboro – Courtesy of Jackson County TDA

Planning Area Overview

Founded in 1851, Jackson County is located in the beautiful Blue Ridge Mountains of Western North Carolina and contains vibrant communities with walkable downtowns, low crime rates, and a progressive, growing healthcare system. The dramatic topography ranges in elevation from 2,000 feet to more than 6,000 feet. According to the 2010 census, Jackson County's population was 40,271 and is currently estimated to be 44,528 in 2020, a nearly 11% increase.

The spectacular scenery including waterfalls, lakes, and mountain peaks, outdoor adventure options, exceptional resorts, dining, and shopping experiences make Jackson County a superb destination. Jackson County is comprised of several small municipalities and villages that have long appealed to tourists, outdoor enthusiasts, and second-home buyers. Sylva is an incorporated town located in central Jackson County. It is the county seat and had a total population of 2,724 in 2018. Dillsboro, which boarders Sylva to the west, is a town that had a population of 245 in 2018. Nearby, Webster is a town and primarily residential community with a population of 384 in 2018. Cullowhee is a census-designated place, and the population was 6,139 in 2018. The community is the home of Western Carolina University with a current student enrollment of 12,243. The Jackson County Airport is located just outside the Cullowhee limits. Forest Hills is a primarily residential village across highway 107 from WCU, with a population of 383 in 2018. Cashiers is a census-designated place and unincorporated village located in southern Jackson County. It had a total population of 78 in 2018. The Qualla Boundary, home of the Eastern Band of Cherokee Indians (EBCI) and entrance to the Great Smoky Mountains National Park, is situated in the northern portion of the county. The town of Cherokee is the cultural and governmental center for the EBCI and is located in both Jackson and Swain Counties. Its population in 2018 was 2,163.

Because of the rural setting, land, housing, broadband, and related challenges discussed previously, the Jackson County Office of Economic Development (OED) is creative by necessity as it addresses the economic conditions that lead to increasing community wealth, health, and quality of life. The office focuses on business recruitment, retention and expansion, civil and social infrastructure, workforce development, and strategic marketing. It helps build and strengthen manufacturing, retail, agriculture, and entrepreneurship activities which consequently support primary economic drivers such as education, health care, and tourism. The OED serves a critical role in creating coalitions of government, education, and business leaders, to catalyze business development and job creation. [26] Along with regional partners, the OED has led discussions around the relationships between economic development, healthcare, transportation, and housing.

Demographics

Population

The estimated population of Jackson County in 2020 was 44,528.[27] The county population increased by 7.8% since 2015, growing by 3,222, and is expected to increase by 4.1% between 2020 and 2025, adding 1844 people.[28]

Figure 1 – Jackson County Population Statistics

Age

Jackson County's 2018 estimated median age is 38[29] which is similar to North Carolina's median age of 39 and less than the median age (46 years) of surrounding counties. However, the median age is skewed by the presence of Western Carolina University's student population[30]. Jackson County has 7,322 millennials (ages 25-39) while the national average for an area this size is 9,059.[27] The retirement age population is higher than normal in Jackson County. The national average for an area this size is 12,919 people 55 or older, compared to 14,436 in Jackson County.[27]

Diversity

Racial diversity is low in Jackson County. The national average for an area this size is 17,526 racially diverse people, while there are 8,501 here.[27] According to the 2014-18 American Community Survey, 81% of Jackson County's population is identified as white.[28] American Indians were the largest minority group at 8%, followed by Hispanic or Latino (6%), Black or African American (2%), and Asian (1.1%). The

Hispanic and Latino population is the fastest growing group with an annual growth rate of 3.7% between 2011 and 2018[31].

Sylva – Courtesy of Jackson County TDA

Figure 2 – Jackson County Diversity Statistics

Households

16,642

Number of households
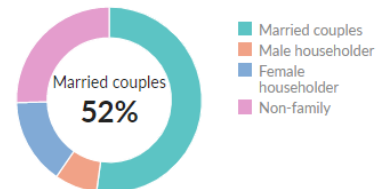
North Carolina: 3,918,597
United States: 119,730,128

2.3

Persons per household
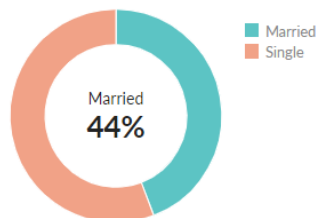
about 90 percent of the figure in North Carolina: 2.5

about 90 percent of the figure in United States: 2.6

Population by household type

Married couples
52%

- Married couples
- Male householder
- Female householder
- Non-family

Show data / Embed

Marital status

Married
44%

- Married
- Single

* Universe: Population 15 years and over

Show data / Embed

Marital status, by sex

	Never married	Now married	Divorced	Widowed
Male	40%	46%	10%†	4%†
Female	35%	43%	13%†	9%†
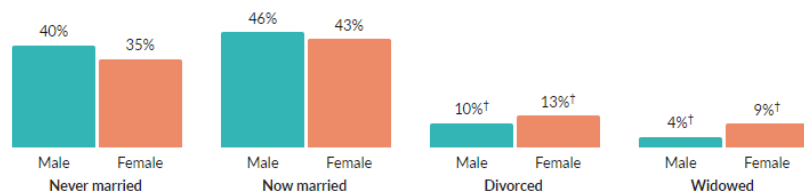
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Families

There are 16,642 households in Jackson County, averaging 2.3 persons which is less than both NC (2.5) and the US (2.6). Married couples make up 52% of households which lags both the state (60%) and country (60%). In fact, between 2000 and 2010, the number of families without children grew from 65.0% to 68.4%. According to Census data, the number of persons per household dropped from 2.77 in 1990 to 2.3 in 2018 and population growth has occurred mainly through the in-migration of college-aged students and retirees.

Business Climate Factors

Land

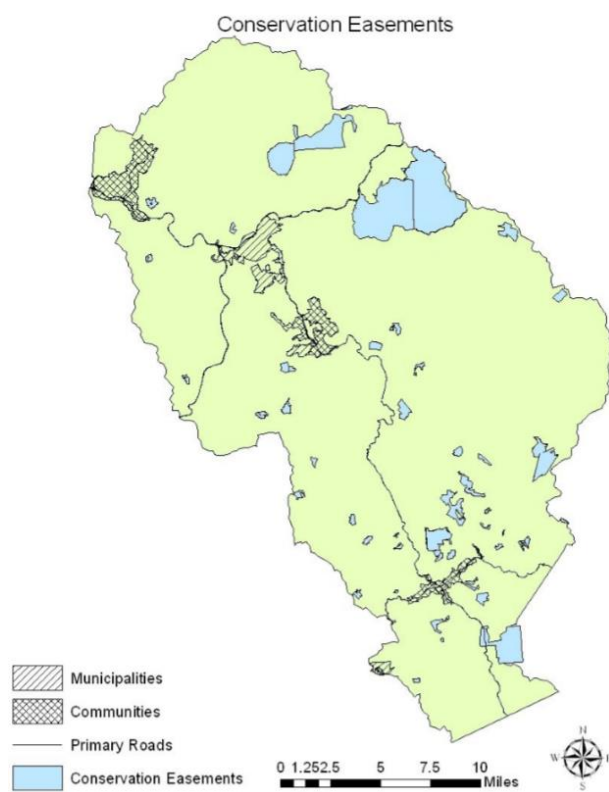*Figure 4 – Federal Land in Jackson County*   *Figure 3 – Conservation Easements*
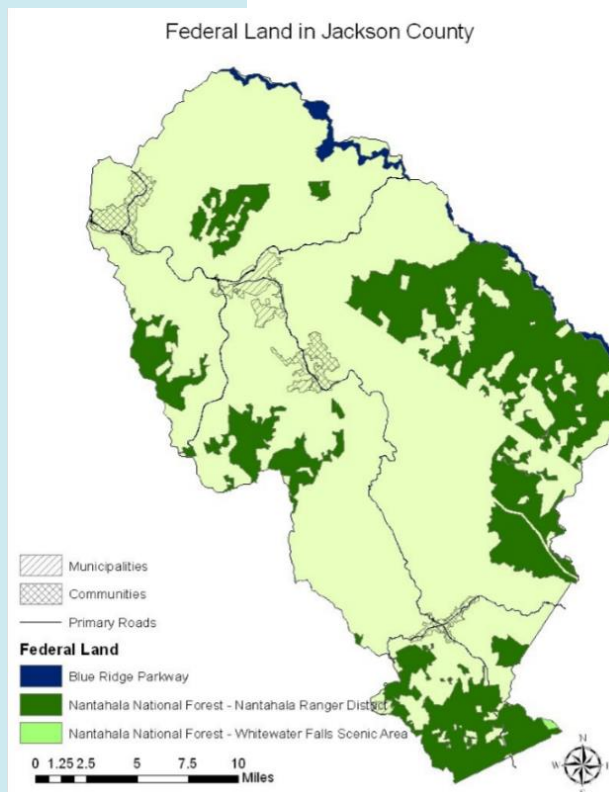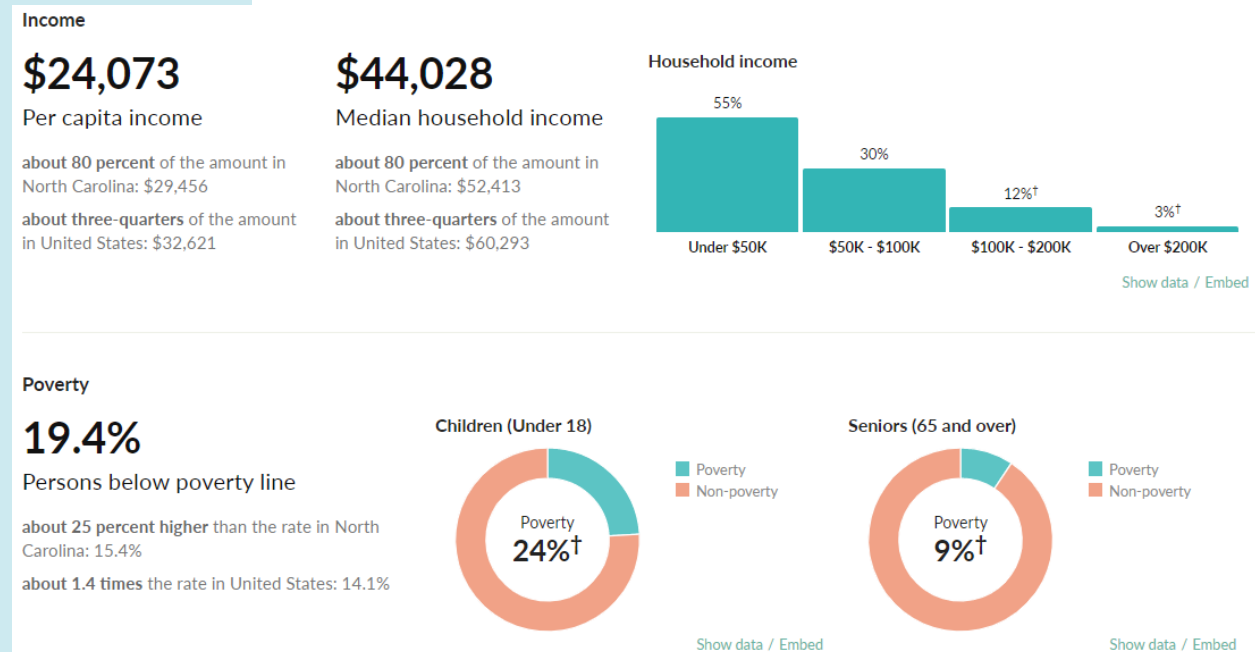

Jackson County spans approximately 317,000 acres (495 sq. miles) and much of the land is federally protected park and game lands, as depicted in the figure, "Federal Land in Jackson County." [1] Most of the federal land consists of the Nantahala National Forest which occupies 231,148 acres in Jackson County. As seen in the figure, "Conservation Easements," there are several tracts of land that have been placed in conservation easements.

Income and Poverty

The median household income of Jackson County residents is $44,028 which lags the state income of $52,413. The poverty rate of 19.4% is slightly greater than the NC and national rates of 15.4% and 14.1% respectively. In 2018, the percentage of children living in poverty (24%) exceeds that of the state (22%) and nation (20%)[28].
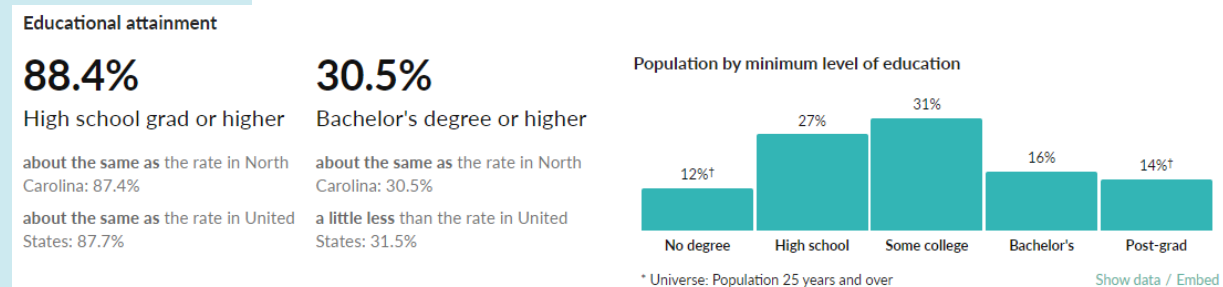
Figure 5 – Income and Poverty Statistics

Income

$24,073

Per capita income

about 80 percent of the amount in North Carolina: $29,456

about three-quarters of the amount in United States: $32,621

$44,028

Median household income

about 80 percent of the amount in North Carolina: $52,413

about three-quarters of the amount in United States: $60,293

Household income

55%

30%

12%†

3%†

Under $50K $50K - $100K $100K - $200K Over $200K

Show data / Embed

Poverty

19.4%

Persons below poverty line

about 25 percent higher than the rate in North Carolina: 15.4%

about 1.4 times the rate in United States: 14.1%

Children (Under 18)

Poverty
Non-poverty

Poverty
24%†

Seniors (65 and over)

Poverty
Non-poverty

Poverty
9%†

Show data / Embed   Show data / Embed

Education

Eighty-eight percent of Jackson County's population graduated from high-school and 30% hold at least a bachelor's degree. Jackson County's k-12 schools, Western Carolina University, and Southwestern Community College provide educational resources that are unique for a rural Appalachian region. Small business and entrepreneurial assistance are at the forefront of their respective strategic initiatives, thereby supplying the area with comprehensive efforts to promote sustainable small business creation.

Figure 6 – Education Statistics

Educational attainment

88.4%

High school grad or higher

about the same as the rate in North Carolina: 87.4%

about the same as the rate in United States: 87.7%

30.5%

Bachelor's degree or higher

about the same as the rate in North Carolina: 30.5%

a little less than the rate in United States: 31.5%

Population by minimum level of education

12%†

27%

31%

16%

14%†

No degree High school Some college Bachelor's Post-grad

* Universe: Population 25 years and over

Show data / Embed

Flyfishing – Courtesy of Jackson County TDA

JACKSON COUNTY PUBLIC SCHOOLS Education has been a stable community anchor in Jackson County and schools date back as far as 1820 with the first superintendent taking office in 1853. Currently, there are nine K-12 schools with more than 3,700 students and nearly 300 certified teachers.[32]

"As the westernmost institution in the University of North Carolina system, WCU attracts students from around the globe to explore the region's vast natural diversity. Founded in 1889 as a teaching college, Western Carolina provides comprehensive educational opportunities to more than 11,000 students in undergraduate and graduate programs."[33] "WCU provides more than 115 undergraduate majors and concentrations and more than 40 graduate programs with a focus on high-demand degrees including a variety of programs in engineering, science, healthcare, education, humanities, business and the arts."[33]

"Southwestern Community College is a learning and teaching institution offering high-quality, innovative instruction and support, which promotes student achievement, academic excellence and economic development."[34]

Housing

Table 8 – Housing Market Data

	2016		2017		2018		Change (2016–2018)
SE:A10001:Housing Units							
Housing Units	26,509		26,847		27,073		2.1%
SE:A10060:Tenure							
Occupied Housing Units:	16,048		16,218		16,642		3.7%
Owner Occupied	10,454	65.1%	10,565	65.1%	10,740	64.5%	2.7%
Renter Occupied	5,594	34.9%	5,653	34.9%	5,902	35.5%	5.5%
SE:A10044:Occupancy Status							
Housing Units:	26,509		26,847		27,073		2.1%
Occupied	16,048	60.5%	16,218	60.4%	16,642	61.5%	3.7%
Vacant	10,461	39.5%	10,629	39.6%	10,431	38.5%	-0.3%
SE:A10047:Vacancy Status by Type of Vacancy							
Vacant Housing Units:	10,461		10,629		10,431		-0.3%
For Rent	503	4.8%	597	5.6%	511	4.9%	1.6%
For Sale Only	118	1.1%	135	1.3%	211	2.0%	78.8%
Other Vacant	9,840	94.1%	9,897	93.1%	9,709	93.1%	-1.3%

According to the table above[35], in 2018 renter-occupied housing comprised 35.5% (5,902 units) of the housing market and has grown faster than owner-occupied housing since 1990. Between 2016 and 2018, rental housing increased twice as fast as owner occupied housing, 5.5% vs 2.7%. Fortunately for renters, the growth rate in average gross rent for renter-occupied housing units lagged NC between 2016 and 2018, 7.5% vs 7.9%. According to U.S. Census data[35] from 2016 to 2018, a total of 671 "one housing unit" building permits were issued in Jackson County, an average of 224 per year. However, 691 permits for housing containing "five or more units" were built during the same time, with 77% of the permits issued in 2019 alone suggesting an acceleration toward the construction of multi-unit apartments and condominiums. This is consistent with the multi-unit housing construction near WCU in Cullowhee.

Of the 10,431 vacant owner-occupied housing units listed in 2018, 93.1% are classified as "other vacant." Seasonal homes, where the owner spends less than 6 months in residency are counted as vacant housing units and would be counted in that table.[30] Roughly 74.2% of vacant housing units in Jackson County are categorized as seasonal, recreational, or occasional use.[30] Jackson County is well-known as a strong second home destination. Statewide, approximately 15% of all housing units are vacant and 32% are considered second homes.[30]

A recent housing report[30] suggested the need for 258 owner-occupied units and 174 rental units in Jackson County. "A net 1,147 owner-occupied units are projected to be needed in Jackson County from 2020 to 2025 – around 229, annually. Likewise, around 703 rental units are needed – around 141 new units on an annual basis. It should be noted that these numbers are for all household types – at all ages and all income levels..." The same report suggests that the county could sustain around 33 new single-family homes per year.
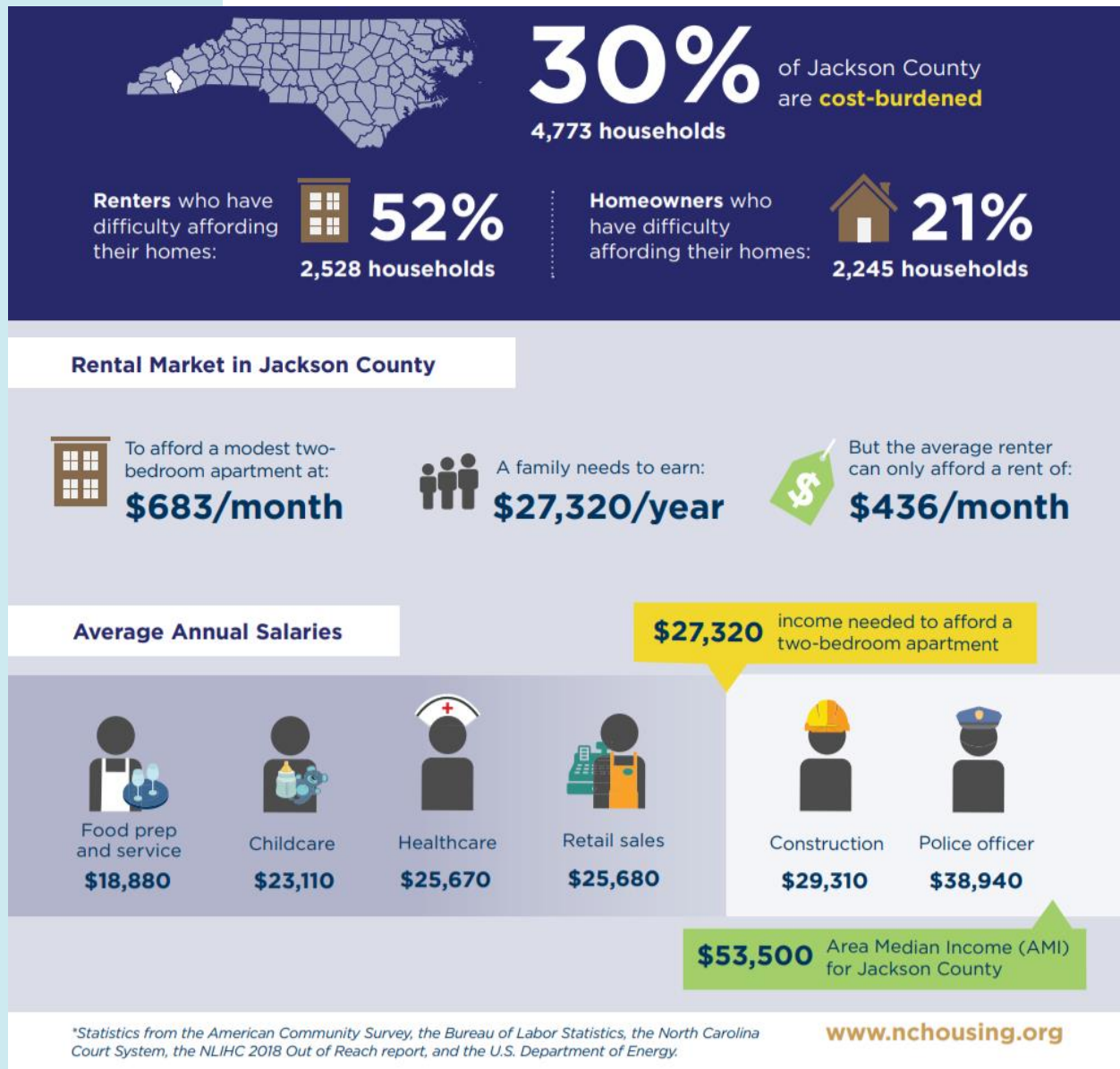
Housing affordability is a key economic development issue in Jackson County. According to the graphic by nchousing.org, 52% of renters and 21% of homeowners in Jackson County have difficulty affording their housing. Thirty percent of households are cost-burdened. Some of the most common jobs in Jackson County do not provide income to afford a two-bedroom apartment. In 2018, 12.6% of workers were employed in Retail Trade, 29.4% in Educational Services and Health Care and Social Assistance, and 19.6% in Arts, Entertainment, and Recreation, and Accommodation and Food Services.

Economic Landscape

Figure 7 – Industry Breakdown
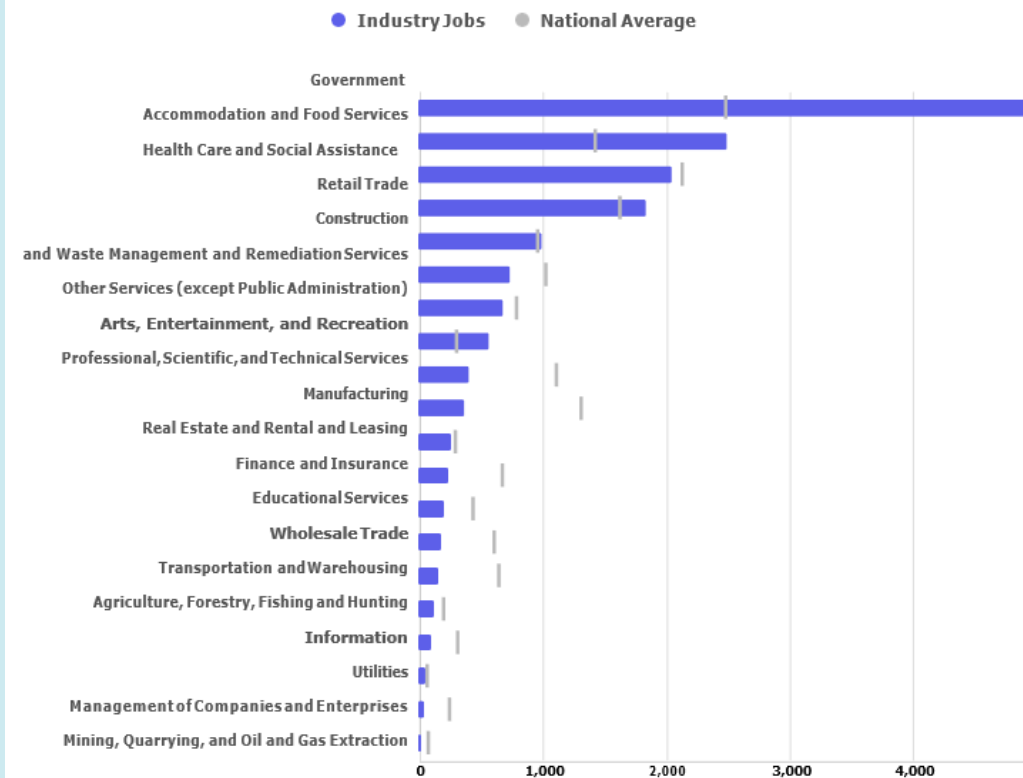
In this graph, Jackson County's 16,062 workers are split into roughly 20 industry clusters. The largest sector is Government, employing 4989 workers. This category includes all federal, state, and local government workers such as postal workers, public works employees, educators in K-12 and higher-education, military, etc. The next largest sector in the County is Accommodation and Food Services (2,442 workers) which includes lodging, and meal, snack, and beverage preparation for immediate consumption. One would expect above average employment in a county with a strong tourism industry like Jackson County. Including Health Care and Social Assistance (2,101 workers) and Retail Trade (1,911), these four industry sectors provide over 70% of Jackson County's employment.

Figure 8 – Top Employers

Company Name	Industry	Class	Employment Range	Rank
Western Carolina University 18221	Educational Services	Public Sector	1000+	1
Dlp Partner Medwest Llc	Health Care and Social Assistance	Private Sector	500-999	2
Jackson County Public Schools	Educational Services	Public Sector	500-999	3
Jackson County	Public Administration	Public Sector	250-499	4
Vaya Health	Public Administration	Public Sector	250-499	5
Aramark Food And Support Services G	Accommodation and Food Services	Private Sector	250-499	6
Dlp Western Carolina Physician Prac	Health Care and Social Assistance	Private Sector	250-499	7
Southwestern Community College	Educational Services	Public Sector	250-499	8
Wal-Mart Associates Inc.	Retail Trade	Private Sector	250-499	9
Ingles Markets, Inc	Retail Trade	Private Sector	100-249	10

The location quotients (LQ) of Government, Arts, Entertainment and Recreation, and Accommodation and Food Services indicate that Jackson County has roughly twice the numbers of workers in these sectors than the national average. Given the presence of Western Carolina University, Southwestern Community College, and a robust hospitality and tourism industry in Jackson County, this is not surprising. Similarly, these industries along with Healthcare and Social Assistance are the top employers and top growing sectors in Jackson County and they comprise the largest share of current job openings.

Summary of Planning Area Overview

Economic development in Jackson County depends on a balance of home-grown business startups, entrepreneurship, and recruitment. Some of the inherent challenges include the topography, which restricts the availability of flat, inexpensive land. Logistically, Jackson County is remote from metropolitan areas which reduces workforce availability, building supplies, and equipment. There is a lack of existing buildings that could be used to recruit companies and insufficient to sustain large-scale manufacturing and STEM industries. The region's economy is largely driven by retail, accommodations, tourism, and outdoor recreation businesses. A 2016 analysis of the region's economy[36] noted that employment growth has been uneven. Eleven industry sectors have added workers since 2010 but just two have contributed 65% of the total employment gains: Arts, Entertainment & Recreation and Accommodation & Food Services. On the other hand, Health Care and Construction have contributed 69% of job losses during the same time.

Correcting for WCU's students, the population is getting older. The 25-35-year-old population is leaving the County, but retired persons are in-migrating and the second-home real estate market is strong. There are more renters and families are getting smaller. The county is home to ample higher-education resources which, when coupled with potential increasing broadband infrastructure, could make Jackson County an attractive destination for those seeking less-urban, congested environments to telework.

Dillsboro – Courtesy of Jackson County TDA

SWOT Analysis

Since this strategic planning exercise is an update to the County's previous 2012 Economic Development Strategic Plan, WithersRavenel discussed the previous SWOT analysis with the County's Economic Development Director in detail. The objective was to understand the information that was still relevant and what was no longer applicable. The previous SWOT was also reviewed with the County's Business and Industry Advisory Committee to discover similar information. Since COVID19 prohibited in-person gatherings, a revised SWOT was produced and conveyed through a virtual format to gather stakeholder feedback. Stakeholders participated virtually using the application at www.mural.co. Through this virtual exercise, participants were able to post comments on virtual sticky notes on the SWOT template as well as endorse ideas that had already been suggested. A partial picture of the completed virtual SWOT has been provided below.

Figure 9 – SWOT Analysis

SWOT comments have been reproduced in the table below.

Table 9 – SWOT Analysis

Strengths	**Weaknesses**
- collaboration between economic and community development organizations, higher-education, business, and entrepreneurial support resource providers (SBTDC, SBC, Southwestern Commission) - vibrant, walkable downtowns - progressive, growing hospital and health care system - federal and state lands that support growing outdoor recreation industry - highly skilled second-home residents and retirees - geographic center of Western NC - low crime, great place to raise family - headquarters for the Southwestern Commission Regional Council of Government	- hard to recruit and expand businesses / population because of a lack of adequate: - broadband - cellular service - affordable workforce and family housing - workforce - water / sewer infrastructure and capacity - developable, inexpensive land - diverse lodging, dining, and retail - far from metro-area - county has several distinct regions that don't interact - elected officials lack diversity in age, race, gender - merchant associations are not very functional - businesses are not agile and ready for change
Opportunities	**Threats**
- infrastructure: - develop a long-term water resources management strategy - create a mixed-use real-estate development - improve river access - add bike paths and access for alternative transportation - use vacant building spaces downtown Sylva - expand and renovate cabin rentals at county campground - business: - perform a feasibility study to discover what industry segments to concentrate on for growth and sustainability - retain youth and talent - create a small business and entrepreneurial hub in downtown Sylva - support home-grown businesses and entrepreneurs	- county is not retaining senior citizens - lack of laborers and trades workers - continued population growth demands services - neighboring counties have big-box stores attracting residents to spend outside county - high cost of living relative to regional wages - factors like COVID-19 and a recession that decrease employment in: - second-home real estate market - hospitality and tourism industry - higher education - healthcare

- o support value-added food businesses, kitchen, and production resources
- o explore the Certified Entrepreneurial Community program
- o explore tech-based partnerships that provide employment
- o expand outdoor recreation
- o educate businesses about resource providers
- o develop entrepreneurial mindset pre-K and up
- tourism
  - o re-brand tourism attraction activities and collaborate regionally
  - o promote fishing tourism and improve infrastructure
  - o increase marketing to leverage increased flight capacity through AVL airport
  - o become a gateway to far WNC
  - o capture the traffic from ATL and other areas that are headed to the Smokies and Casino
  - o explore Retirement Certified Community

Figure 10 – Asset Inventory and Gap Analysis

Another virtual exercise that was conducted involved stakeholder participants providing feedback on an asset inventory and gap analysis. The purpose of this exercise was to obtain participant feedback on the perceived assets that exist in each community as well as identifying needs or gaps.

For readability purposes the gaps identified through this interactive exercise have been reproduced below:

Jackson County

- business gaps
    - nature-based
    - architecture / design
- industry gaps
    - non-timber agriculture
    - food processing facilities
- tourism gaps
    - gateway to far west feature
    - hiking trails and more accessible towns
    - recreation lifestyle promoted
    - infrastructure for travel sports teams

Sylva
- business gaps

- o grocery, retail, sidewalk activity on Mill Street, college town shops, shoe store, stationary store
- o arts / crafts gallery and artisan industries
- tourism gaps
  - o hiking trails, stream access, off-road bike access, visible recreation
  - o convert 'problem spring' at town parking lot into a water feature attraction and picnic area

Cullowhee / Forest Hills
- business gaps
  - o funky shops
- industry gaps
  - o WCU R&D presence
- tourism gaps
  - o trails and greenway that link to Sylva
  - o bike rental
- other gaps
  - o children's park
  - o use bridge over 107 to communicate events that no one sees online

Dillsboro
- business gaps
  - o toy store
  - o maker's space or tool library
  - o kids' activities / museum
- industry gaps
  - o artisan space / support
  - o climbing area at mine
  - o connection between town and green energy park
  - o outdoor gear makers
  - o start-up manufacturing
- tourism gaps
  - o trails and greenway in or near town
  - o river park, river access, picnic area, dining
  - o bridge or access across 441 to encourage 'main street feeling' and better connection with town

Webster
- business gaps
  - o stores
  - o improve high-speed internet and cellular service
- tourism gaps
  - o bathroom, garbage cans, and public parking area for fishermen
  - o River Road scenic walking trail
- other gaps
  - o sidewalks
  - o Webster is still tranquil
  - o improve the roundabout's appearance to be more welcoming and attractive
  - o need a covered pavilion or gathering place
  - o cultural center that supports local produce, arts, and crafts

- o   safe pedestrian crossing on 107

Whittier / Qualla Boundary

- business gaps
  - o   dining establishments
- industry gaps
  - o   local furniture
- tourism gaps
  - o   trails and greenway that link communities to national park entrance

Economic Resilience

According to the US Economic Development Administration (EDA), Economic Resilience is the ability to avoid, withstand, and recover quickly from a shock. Possible macro-economic risks that impact workforce, education, housing, and other economic development factors could include events like the following:

- Recession that impacts the second home market and tourism in Jackson County
- Landslide that closes a major transportation artery
- Pandemic, like COVID-19, that creates fear, uncertainty, and high incidences of fatalities

In this section, we have prepared a framework for economic resilience that provides an approach for becoming better prepared for future disasters, recovering from disasters, and then transitioning back to steady state. The framework is depicted in the following diagram, and each of the three phases are described in the following narrative.
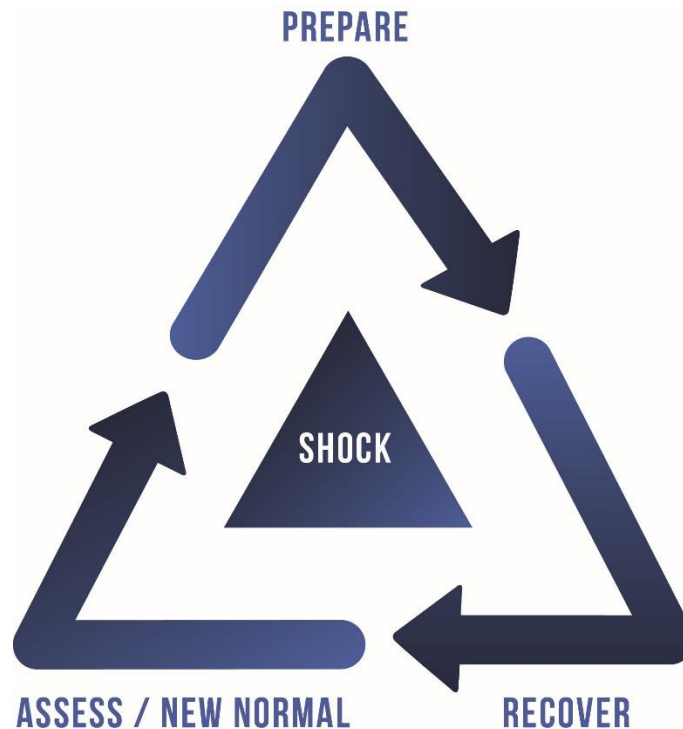
Prepare

Strategies to Develop a More Resilient Economy

The following actions, enumerated in the Goals section, will help to develop a more resilient economy:

- Develop a long-term strategy to diversify and expand the regional industrial base.
- Develop personal relationships and reliable communication avenues with top employers in the region (See section entitled, "Economic Landscape" for a list of top 10 employers in Jackson County).
- Develop personal relationships and a communication strategy for small businesses in the region.
- Focus efforts on strengthening existing businesses, especially high-growth businesses.
- Increase availability of "baseline" business information. Develop an inventory with contact information for businesses within jurisdiction.
- Increase communications between local government, emergency management, utilities, and the business community.
- Partner with community colleges and the university system to establish nimble workforce development programs that can prepare residents for the future economy but also retrains residents.
- Develop a procurement strategy and team who are authorized to procure goods and services from local providers in the event of an emergency. There should be a database of local suppliers and services. The procurement team should have a working knowledge and understanding of FEMA procurement and reimbursement rules.
- Develop responsive initiatives that define key stakeholders, roles, responsibilities, and actions. In addition, establish a system for regular communication, monitoring, and updating of business community needs and issues.

These steady-state initiatives diversify the economic base of the region, making the entire region more adaptable and better able to withstand or avoid a shock.

Recovery

Tactics will change with each shock, so there should be a system in place for assessing and prioritizing recovery efforts to ensure that the most pressing issues are addressed first. There should be a detailed procurement plan in place that sources local suppliers and providers in the immediate aftermath of a shock like a natural or manmade disaster. Supply routes, highways, and airports could be shut down, so there should be local supplier identified prior to a disaster occurring. In addition, procurement of goods and services should be conducted in accordance with standards that allow for FEMA reimbursement; therefore, the procurement team should have a working knowledge and understanding of FEMA procurement standards. There should also be a list of resources prepared and made generally available to the public that outlines who to call for support during times of disaster.

It should be noted that Jackson County, like many parts of the world, has experienced a severe shock in the form of the COVID-19 pandemic in 2020. Some of the beneficial actions that the County implemented included:

- Regular communication between the Health Department and other branches of county, state, and federal government, K-12 and higher education, law enforcement, and community leaders
- Creation of the "All In Jackson Fund" small business loans which aim to provide a rapid source of assistance for Jackson County-based businesses that have been impacted by COVID-19[37]
- Widespread promotion of federal programs like the CARES ACT Paycheck Protection Program implemented by the Small Business Administration[38] and COVID-19 prevention steps[39]

Assess

A vital component to any action plan is to assess the effectiveness of a plan. Economic Resiliency is an ongoing effort. While Jackson County still struggles with COVID-19 impacts, it is important that leaders start the assessment process now. Assessments could include questions like the following:

- What parts of the plan were helpful during a shock?
- What parts of the plan were not helpful?
- How can the plan be improved based upon the region's ability to withstand or avoid the shock?

While shocks occur infrequently and are almost always unexpected, there are ways to assess resiliency plans in the absence of an actual shock. One way to assess plans is to conduct simulated exercises. Simulations should include business and industry leaders, County and local leaders, and state emergency management personnel to assess the strength and weaknesses of the resiliency plan. Following simulated exercises, officials should correct the resiliency plan where possible and acknowledge any potential shortcomings. With a constructive critical analysis of lessons learned, the plan can be improved after every simulation and every shock.

New Normal

Following the immediate recovery period, County partners should return to steady-state initiatives in order to resume long-term efforts to diversify, strengthen, and develop a more adaptable economy. Efforts should be prioritized based on the shock but should include local business outreach to update the local business inventory. Typically, 40-60% of businesses do not reopen after a disaster.[40] Regional, national and global economic shifts often have devastating effects on local economies. The region's ability to work toward an agile steady state will be measured by the number of businesses that survive a shock, as well as the ability to adapt to the new normal following a shock with a rebuilt economy. The more effort put into the steady state, the more resilient the regional economy is likely to be.

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