



Assessment Report: Mecklenburg County, NC Prosperity for Greater Charlotte

An initiative to align the region's economic, workforce, and education efforts to boost prosperity in the 21st Century

The initiative was sponsored by:



Vibrant Communities - Robust Region

The project was assisted by the consulting team of **Avalanche Consulting**, the **Council for Adult & Experiential Learning**, and **McCallum Sweeney Consulting**

December, 2012



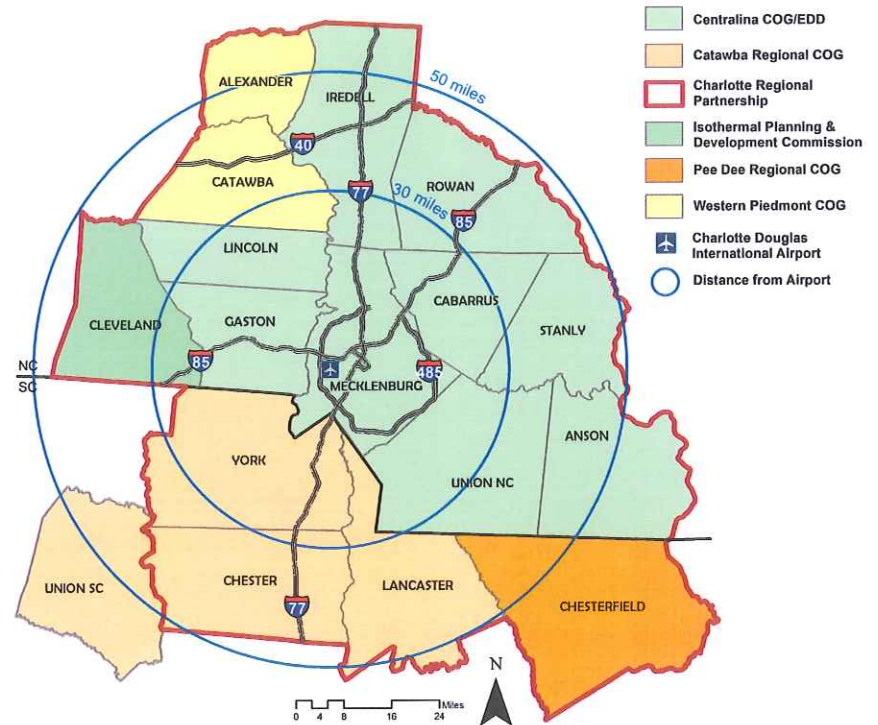
Strategic Economic Assessment Overview

The **Prosperity for Greater Charlotte** project and the HUD **“CONNECT Our Future”** Economic Development Group collaboratively partners the Centralina Council of Governments, Catawba Regional Council of Governments, Centralina Economic Development Commission, and the Charlotte Regional Partnership in an innovative, integrated approach that is essential to support the region’s future growth and prosperity. In May 2012, the Centralina Economic Development Commission and this coalition of regional partners began a strategic assessment process to evaluate the 17-county greater Charlotte economy and identify strategies to boost economic and educational success.

In anticipation of dynamic economics that will drive future global competitiveness, our innovative strategic planning design dictated inclusion of seventeen counties in the global competency analysis, parallel with the Charlotte USA footprint. This collaborative community network shown on the map illustrates the fifty-mile radius economic zone that constitutes the Greater Charlotte 21st Century Global Region.

The consulting team of Avalanche Consulting, Inc., the Council for Adult and Experiential Learning (CAEL), and McCallum Sweeney Consulting led the project’s technical analysis. An Advisory Council comprised of 39 industries, public sector, nonprofit, and economic development leaders provided guidance and input throughout the project. All report findings and priorities with goals, objectives, and tactics are specifically endorsed and adopted only for the EDA-approved nine-county jurisdiction of the Centralina Economic Development Commission (EDD). This report in no way replaces or supplants adjacent EDD CEDS jurisdiction plans that share partial coverage within the economic zone of influence defined and analyzed for this report.

The project culminates in three strategic plans: the *Centralina Comprehensive Economic Development Strategy* and the integrally linked Greater Charlotte region *Jobs, Workforce & Education Alignment Strategy* with the additionally supported, but independently completed, *Catawba Region Comprehensive Economic Development Strategy* of the Catawba Regional Council of Governments. The resulting Centralina strategy calls on regional leadership to heighten collaborative efforts around five goals. Full detail on the strategies and all project reports, along with the supporting analysis can be found at the links www.ProspersityForGreaterCharlotte.com and www.ConnectOurFuture.org



Employment Growth Trend

Key Statistics, 2011: Mecklenburg County, NC

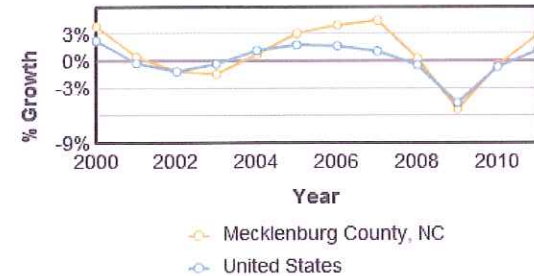
Employment Base:	551,000
Payroll Base:	\$31 M
Job Growth Rate:	2.9%
Payroll Growth Rate:	6.0%
Total Unemployed:	50,500
Unemployment Rate:	10.7%
Average Salary:	\$56,100

% Growth Rate: Mecklenburg County job growth has outperformed the US over the past decade, but had a larger downturn during the recession. The county has rebounded slightly faster than the US, reaching a 2.9% growth rate in 2011.

MECKLENBURG COUNTY, NC

Annual Growth Rate, Employment, All Industries, 2000-2011

Mecklenburg County, NC vs. U.S.

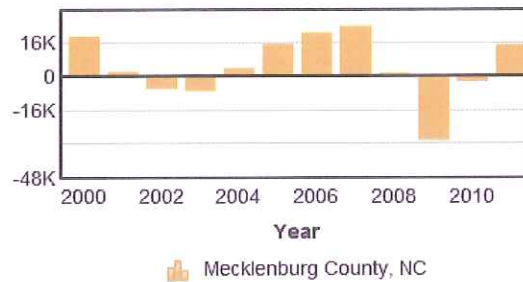


Net New Employment: During the recession, the county lost 33,00 jobs with nearly all job losses occurring in 2009. Job creation turned positive in 2011, with 15,000 jobs created.

Net New Payroll: The county's payroll base declined by \$2.4 billion in 2009 but turned positive in 2010, one year before job growth turned positive. Last year in 2011, the county's payroll grew by \$1.5 billion.

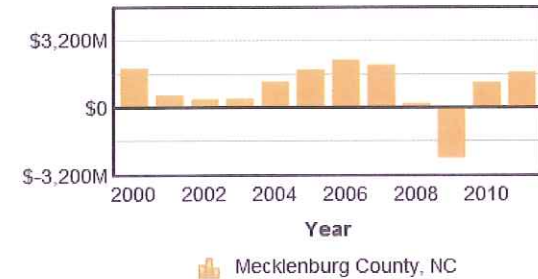
Net New Employment, All Industries, 2000-2011

Mecklenburg County, NC



Net New Payroll, All Industries, 2000-2011

Mecklenburg County, NC



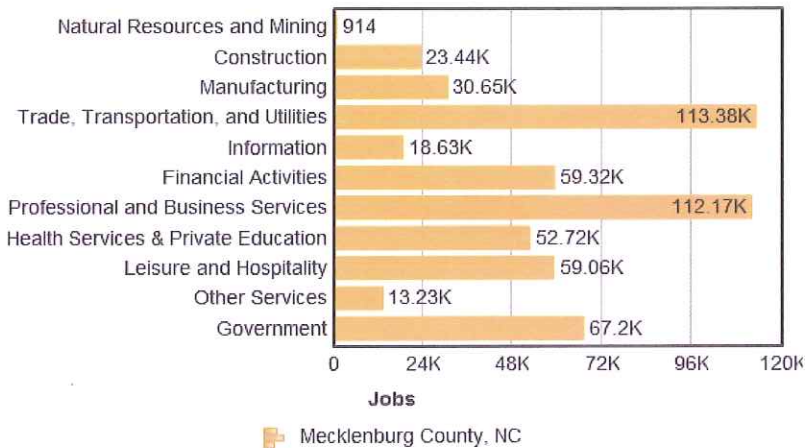
Industry Composition

Top Industries: Mecklenburg County's largest industries are Professional & Business Services (112,000 jobs), Trade, Transportation & Utilities (113,000) and Financial Activities (59,300).

% Growth by Industry: Health Services (which includes Private Education providers) has been the leading growth industry in the county, followed by Leisure & Hospitality and Government. Health Services grew 26% from 2006-2011, more than twice US growth in the industry. The other two leading industries grew about 14%.

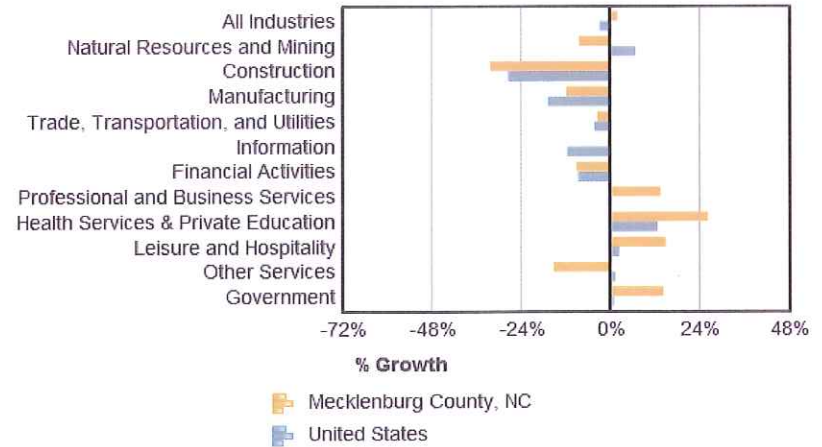
New Jobs by Industry: During the period 2006-2011, Professional Service created the most jobs (13,100). Health Services (10,800 jobs) and Government (8,200) were the other two top creators.

Employment by Industry, 2011
Mecklenburg County, NC

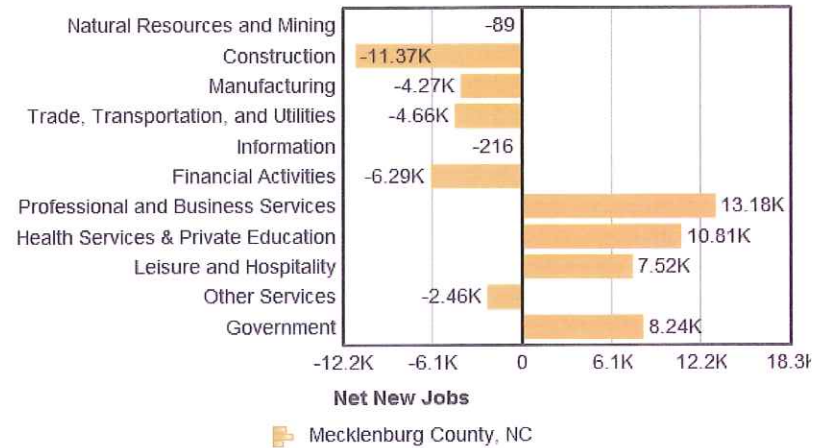


MECKLENBURG COUNTY, NC

% Growth, Employment, 2006-2011
Mecklenburg County, NC vs. U.S.

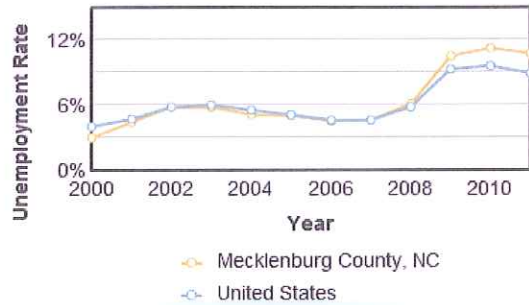


New Jobs, 2006-2011
Mecklenburg County, NC



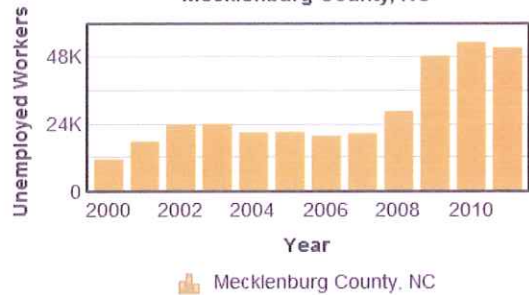
Workforce Conditions

Unemployment Rate, 2000-2011
Mecklenburg County, NC vs. U.S.



Unemployment: The unemployment rate in Mecklenburg County, now 10.7%, surpassed the US rate in 2009 for the first time in the decade. The number of unemployed workers in the county grew from 21,000 in 2007 to a peak of 53,500 in 2010 and has since declined.

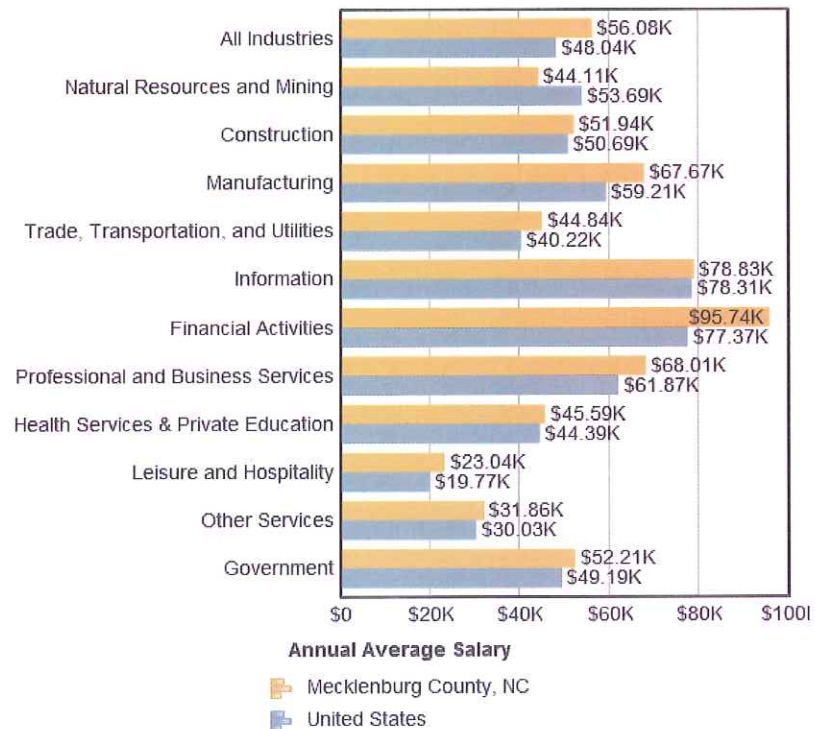
Total Unemployed Workforce, 2000-2011
Mecklenburg County, NC



MECKLENBURG COUNTY, NC

Average Salary by Industry: Mecklenburg County's average salary reached \$56,100 in 2011. The county's highest average salary is in the Financial Activities industry, \$95,800, which is far higher than the US average for the industry. High salaries are also found in Information (\$78,800) and Professional and Business Services (\$68,000).

Average Salary by Industry, 2011
Mecklenburg County, NC vs. U.S.



In 2011, the three industries with the fastest growing salaries were Natural Resources and Mining (9.6%), Financial Activities (5.3%) and Manufacturing (4.7%).

Top 15 Private Sector Industries by 4-Digit NAICS

MECKLENBURG COUNTY, NC

LARGEST EMPLOYMENT			MOST NEW JOBS, Past 5 Years			Net New Jobs		FORECASTED NEW JOBS, Next 5 Years		
NAICS	Industry	Jobs	NAICS	Description	2007-2012	2007-2012	NAICS	Description	2012-2017	
5511	Management of Companies and ...	24,875	7222	Limited-Service Eating Places	2,716	5221	Depository Credit Intermedia...	4,834		
5221	Depository Credit Intermedia...	23,607	7139	Other Amusement and Recreati...	2,461	5416	Management, Scientific, and ...	3,707		
7221	Full-Service Restaurants	21,090	6211	Offices of Physicians	2,249	7222	Limited-Service Eating Places	3,050		
7222	Limited-Service Eating Places	20,591	7221	Full-Service Restaurants	2,046	6211	Offices of Physicians	2,457		
5613	Employment Services	19,950	5416	Management, Scientific, and ...	1,866	7221	Full-Service Restaurants	2,044		
5416	Management, Scientific, and ...	10,131	5511	Management of Companies and ...	1,697	5613	Employment Services	1,871		
6211	Offices of Physicians	10,123	6223	Specialty (except Psychiatri...	1,309	7139	Other Amusement and Recreati...	1,743		
2382	Building Equipment Contractors	8,796	6113	Colleges, Universities, and ...	1,083	6241	Individual and Family Services	1,581		
4451	Grocery Stores	8,482	4251	Wholesale Electronic Markets...	1,010	5616	Investigation and Security S...	1,551		
5617	Services to Buildings and Dw...	7,881	6216	Home Health Care Services	868	2382	Building Equipment Contractors	1,417		
5413	Architectural, Engineering, ...	7,404	5614	Business Support Services	828	5239	Other Financial Investment A...	1,341		
5241	Insurance Carriers	6,915	5415	Computer Systems Design and ...	824	5617	Services to Buildings and Dw...	1,286		
7139	Other Amusement and Recreati...	6,606	6111	Elementary and Secondary Sch...	755	5614	Business Support Services	1,006		
4521	Department Stores	6,577	5239	Other Financial Investment A...	665	4529	Other General Merchandise St...	925		
4238	Machinery, Equipment, and Su...	6,481	6212	Offices of Dentists	609	2362	Nonresidential Building Cons...	877		

HIGHEST SPECIALIZATION (High LQ)			FASTEST % GROWTH, Past 5 Years			% Growth		FORECASTED % GROWTH, Next 5 Years		
NAICS	Industry	Location Quotient	NAICS	Description	2007-2012	2007-2012	NAICS	Description	2012-2017	
3346	Manufacturing and Reproduc...	12.3	6223	Specialty (except Psychiatri...	2567%	5612	Facilities Support Services	52%		
4852	Interurban and Rural Bus Tra...	10.0	5191	Other Information Services	146%	8131	Religious Organizations	48%		
5152	Cable and Other Subscription...	6.5	3132	Fabric Mills	104%	6241	Individual and Family Services	45%		
5182	Data Processing, Hosting, an...	5.7	5112	Software Publishers	92%	5112	Software Publishers	45%		
4811	Scheduled Air Transportation	5.0	5417	Scientific Research and Deve...	78%	5416	Management, Scientific, and ...	37%		
5179	Other Telecommunications	3.6	6216	Home Health Care Services	60%	4232	Furniture and Home Furnishin...	33%		
7112	Spectator Sports	3.5	7139	Other Amusement and Recreati...	59%	4248	Beer, Wine, and Distilled Al...	32%		
3336	Engine, Turbine, and Power T...	3.4	6214	Outpatient Care Centers	58%	8139	Business, Professional, Labo...	32%		
5239	Other Financial Investment A...	3.4	3119	Other Food Manufacturing	45%	4242	Drugs and Druggists' Sundrie...	32%		
4831	Deep Sea, Coastal, and Great...	3.3	6113	Colleges, Universities, and ...	42%	5611	Office Administrative Services	31%		
5221	Depository Credit Intermedia...	3.3	4232	Furniture and Home Furnishin...	41%	5616	Investigation and Security S...	30%		
3132	Fabric Mills	3.3	6111	Elementary and Secondary Sch...	35%	5152	Cable and Other Subscription...	29%		
5511	Management of Companies and ...	3.2	4831	Deep Sea, Coastal, and Great...	33%	2362	Nonresidential Building Cons...	29%		
4238	Machinery, Equipment, and Su...	3.2	6215	Medical and Diagnostic Labor...	33%	5239	Other Financial Investment A...	28%		
5151	Radio and Television Broadca...	2.6	5612	Facilities Support Services	30%	7139	Other Amusement and Recreati...	26%		

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Note: % Growth includes only industries with more than 500 jobs.

Private Sector Industry Clusters

MECKLENBURG COUNTY, NC

Mecklenburg County's three largest clusters by employment size are Retail (62,400 employees), Culture & Entertainment (62,000), and Finance (56,700).

The county's three fastest growing clusters of the past five years (2007 to 2012) were Healthcare (20% growth, 7,500 new jobs), Culture & Entertainment (12% growth, 6,600 new jobs), and Research (26% growth, 2,200 new jobs).

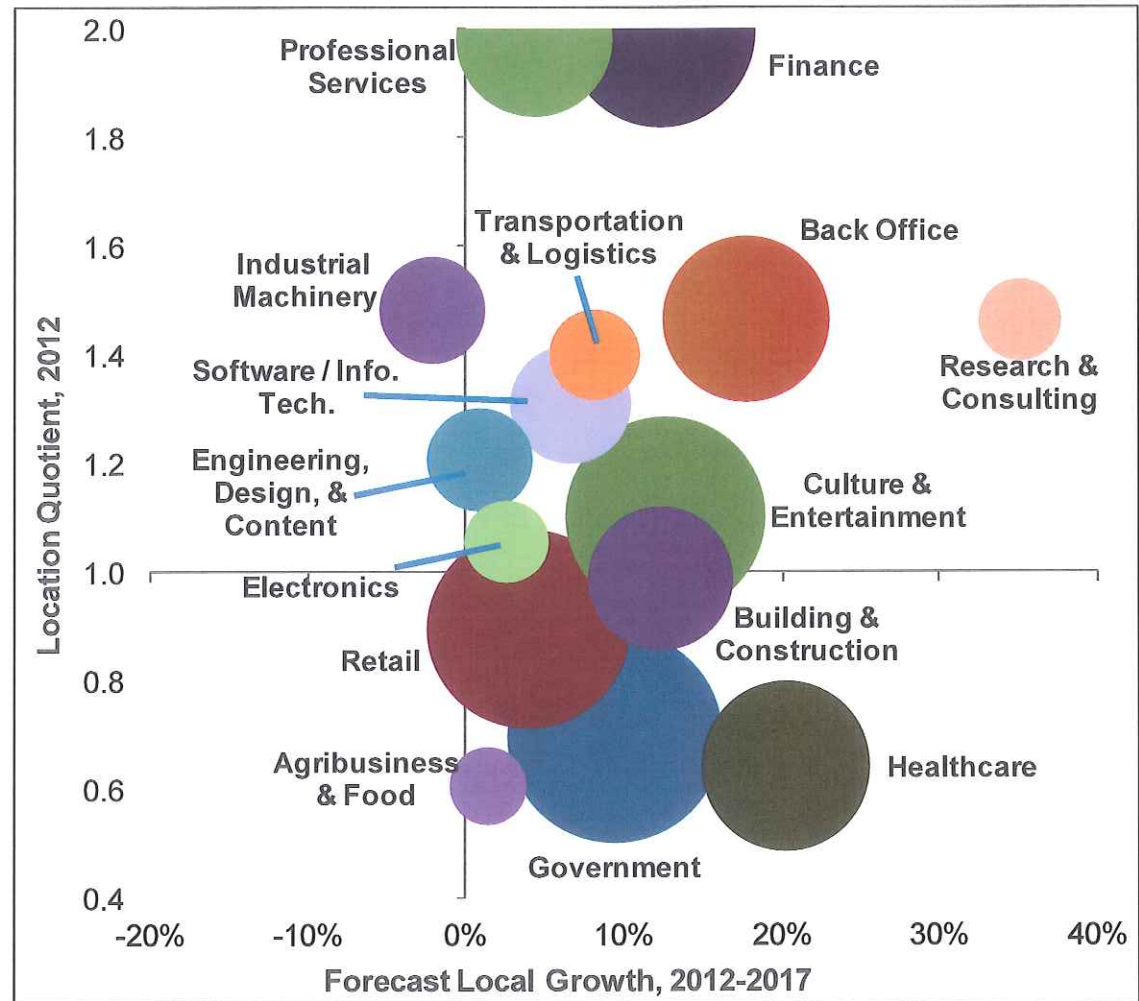
The three fastest forecasted growth clusters (2012 to 2017) for the county are: Research (35% forecast growth), Biomedical Supplies & Labs (21%), and Healthcare (20%). [Note: Forecasts from EconomicModeling.com]

The county's clusters with the highest concentration (highest Location Quotient) are Finance (LQ=1.99), Professional Services (1.98), and Industrial Machinery (1.48). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, emerging clusters – those with a low LQ but high growth rates – include Aerospace, Biomedical Supplies & Labs, and Private Education.

Declining clusters include Building & Construction, which employs 31,800 workers, has an LQ of 0.99, and lost 33% of its employment base (15,400 jobs) in the last five years. Retail employs 62,400, LQ=0.89, and lost 8% (5,400 jobs). Finance employs 56,700, LQ=1.99, and lost 8% (4,600 jobs).

Industry Clusters: Mecklenburg County, NC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Industry Cluster Competitiveness

Mecklenburg County, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Aerospace	179	0.09	32.6%	44	7	3.9%	0.2%
Agribusiness & Food	9,246	0.61	-8.5%	(859)	126	1.4%	1.9%
Apparel & Textiles	2,101	1.00	-12.4%	(297)	(386)	-18.4%	-20.1%
Automotive	1,950	0.47	-11.6%	(257)	(131)	-6.7%	-6.0%
Back Office	43,296	1.47	-3.1%	(1,384)	7,645	17.7%	8.3%
Biomedical Supplies & Labs	2,627	0.62	14.4%	330	540	20.6%	8.0%
Building & Construction	31,825	0.99	-32.7%	(15,436)	3,918	12.3%	5.3%
Consumer Goods Mftg	1,955	0.75	-11.3%	(250)	139	7.1%	-0.6%
Culture & Entertainment	61,963	1.10	11.8%	6,553	7,788	12.6%	6.2%
Education	8,932	0.83	28.8%	1,996	1,210	13.5%	13.2%
Electronics	10,657	1.06	-3.1%	(338)	275	2.6%	1.3%
Energy	2,569	0.42	-16.5%	(509)	(546)	-21.3%	-1.5%
Engineering, Design, & Content	17,037	1.21	-18.3%	(3,828)	143	0.8%	2.0%
Finance	56,731	1.99	-7.5%	(4,584)	6,960	12.3%	3.2%
Furniture	1,519	0.86	0.5%	8	254	16.7%	-3.5%
Government	71,677	0.70	8.9%	5,848	6,746	9.4%	4.0%
Healthcare	44,690	0.64	20.2%	7,519	9,051	20.3%	11.8%
Industrial Machinery	17,603	1.48	-3.5%	(643)	(373)	-2.1%	-1.2%
Logging & Metal/Mineral Mining	215	0.27	-29.0%	(88)	13	6.0%	-2.2%
Materials	7,652	1.10	-17.7%	(1,642)	(967)	-12.6%	-7.2%
Metalworking	3,466	0.50	-22.3%	(993)	(397)	-11.5%	-5.1%
Non-Profits	2,695	0.49	-47.4%	(2,431)	154	5.7%	6.3%
Professional Services	37,472	1.98	3.2%	1,160	1,613	4.3%	5.5%
Research	10,963	1.46	25.5%	2,231	3,846	35.1%	21.5%
Retail	62,409	0.89	-7.9%	(5,374)	2,467	4.0%	3.3%
Shipbuilding	0	0.00		0	0		-6.0%
Software / Info. Tech.	13,074	1.40	8.0%	969	1,063	8.1%	16.5%
Telecom Services	4,648	1.34	-6.0%	(299)	(487)	-10.5%	-2.0%
Transportation & Logistics	22,605	1.31	-12.7%	(3,303)	1,501	6.6%	4.6%
Total	551,707	1.00	-3.2%	(18,316)	52,150	9.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Mecklenburg County, NC Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012		2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Employment	2012 LQ	Growth	New Jobs	New Jobs	Local %	US %
Aerospace	3364	Aerospace Product and Parts Manufacturing	179	○ 0.1	32.6%	44	7	3.9%	0.2%
Agribusiness & Food	1110	Crop Production	682	● 0.3	-9.9%	(75)	24	3.5%	-1.2%
Agribusiness & Food	3112	Grain and Oilseed Milling	133	● 0.6	-28.9%	(54)	(84)	-63.2%	-1.9%
Agribusiness & Food	3113	Sugar and Confectionery Product Manufacturing	22	○ 0.1	69.2%	9	4	18.2%	-4.3%
Agribusiness & Food	3114	Fruit & Vegetable Preserving & Specialty Food Mfg.	202	● 0.3	69.7%	83	22	10.9%	-3.8%
Agribusiness & Food	3115	Dairy Product Manufacturing	85	○ 0.2	553.8%	72	13	15.3%	1.1%
Agribusiness & Food	3118	Bakeries and Tortilla Manufacturing	1,768	● 1.6	-6.6%	(125)	(509)	-28.8%	-1.0%
Agribusiness & Food	3119	Other Food Manufacturing	1,486	● 2.2	45.4%	464	43	2.9%	3.8%
Agribusiness & Food	3121	Beverage Manufacturing	564	● 0.8	-9.5%	(59)	(163)	-28.9%	0.9%
Agribusiness & Food	4244	Grocery & Related Prod. Wholesalers	3,637	● 1.2	-19.6%	(886)	582	16.0%	6.4%
Agribusiness & Food	4248	Beer, Wine, & Liquor Wholesalers	627	● 0.9	-21.2%	(169)	199	31.7%	10.0%
Apparel & Textiles	3132	Fabric Mills	627	● 3.2	104.2%	320	(158)	-25.2%	-34.2%
Apparel & Textiles	3133	Textile & Fabric Finishing & Coating Mills	49	● 0.4	-63.4%	(85)	(44)	-89.8%	-33.5%
Apparel & Textiles	3141	Textile Furnishings Mills	117	● 0.6	-68.1%	(250)	(48)	-41.0%	-26.4%
Apparel & Textiles	3149	Other Textile Product Mills	88	● 0.4	-72.5%	(232)	7	8.0%	-6.4%
Apparel & Textiles	3152	Cut and Sew Apparel Manufacturing	11	○ 0.0	120.0%	6	(6)	-54.5%	-33.6%
Apparel & Textiles	4243	Apparel, Piece Goods, & Notions Wholesalers	1,199	● 2.1	5.4%	61	(137)	-11.4%	-3.0%
Automotive	3362	Motor Vehicle Body and Trailer Manufacturing	63	○ 0.1	-54.0%	(74)	(41)	-65.1%	-3.9%
Automotive	3363	Motor Vehicle Parts Manufacturing	168	○ 0.1	-18.0%	(37)	(39)	-23.2%	-12.1%
Automotive	3369	Other Transportation Equipment Manufacturing	26	● 0.2	160.0%	16	6	23.1%	4.8%
Automotive	4231	Motor Vehicle & Parts & Supplies Wholesalers	1,688	● 1.3	-9.0%	(167)	(57)	-3.4%	0.3%
Back Office	5611	Office Administrative Services	2,390	● 1.3	20.6%	409	745	31.2%	12.4%
Back Office	5612	Facilities Support Services	1,448	● 2.3	30.2%	336	750	51.8%	14.8%
Back Office	5613	Employment Services	19,950	● 1.7	-10.6%	(2,354)	1,871	9.4%	6.0%
Back Office	5614	Business Support Services	4,103	● 1.2	25.3%	828	1,006	24.5%	9.4%
Back Office	5616	Investigation and Security Services	5,189	● 1.6	-1.8%	(96)	1,551	29.9%	9.9%
Back Office	5617	Services to Buildings and Dwellings	7,881	● 1.1	-9.2%	(795)	1,286	16.3%	9.8%
Back Office	5619	Other Support Services	2,335	● 2.0	14.1%	288	436	18.7%	4.7%
Biomedical Supplies & Labs	3254	Pharmaceutical and Medicine Manufacturing	349	● 0.3	82.7%	158	70	20.1%	4.4%
Biomedical Supplies & Labs	3391	Medical Equipment and Supplies Manufacturing	550	● 0.4	-16.5%	(109)	(7)	-1.3%	3.8%
Biomedical Supplies & Labs	4242	Drugs & Druggists' Sundries Merchant Wholesalers	804	● 1.0	7.2%	54	254	31.6%	9.6%

Mecklenburg County, NC Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012		2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Employment	2012 LQ	Growth	New Jobs	New Jobs	Local %	US %
Biomedical Supplies & Labs	6215	Medical and Diagnostic Laboratories	924	● 0.9	32.6%	227	223	24.1%	16.3%
Building & Construction	2361	Residential Building Construction	2,609	● 1.1	-58.0%	(3,603)	74	2.8%	6.4%
Building & Construction	2362	Nonresidential Building Construction	3,057	● 1.1	-4.4%	(142)	877	28.7%	6.1%
Building & Construction	2371	Utility System Construction	588	● 0.4	-61.2%	(928)	(46)	-7.8%	4.6%
Building & Construction	2372	Land Subdivision	161	● 0.8	-70.9%	(392)	14	8.7%	-4.2%
Building & Construction	2373	Highway, Street, and Bridge Construction	878	● 0.8	-67.4%	(1,819)	158	18.0%	6.3%
Building & Construction	2379	Other Heavy and Civil Engineering Construction	154	● 0.4	-37.1%	(91)	76	49.4%	5.1%
Building & Construction	2381	Foundation, Structure, & Bldg. Ext. Contractors	2,609	● 0.9	-33.2%	(1,297)	141	5.4%	4.7%
Building & Construction	2382	Building Equipment Contractors	8,796	● 1.3	-18.3%	(1,967)	1,417	16.1%	8.5%
Building & Construction	2383	Building Finishing Contractors	2,993	● 1.2	-34.6%	(1,586)	308	10.3%	6.0%
Building & Construction	2389	Other Specialty Trade Contractors	1,765	● 0.8	-26.6%	(641)	252	14.3%	7.7%
Building & Construction	3219	Other Wood Product Manufacturing	476	● 0.6	-33.6%	(241)	(9)	-1.9%	-6.4%
Building & Construction	3271	Clay Product and Refractory Manufacturing	52	● 0.3	-44.7%	(42)	(21)	-40.4%	-7.3%
Building & Construction	3273	Cement and Concrete Product Manufacturing	517	● 0.8	-39.0%	(331)	0	0.0%	3.7%
Building & Construction	3279	Other Nonmetallic Mineral Product Manufacturing	68	● 0.3	-35.2%	(37)	13	19.1%	1.0%
Building & Construction	4233	Lumber & Other Const. Materials Wholesalers	1,174	● 1.5	-29.1%	(483)	50	4.3%	4.0%
Building & Construction	4237	Hardware, & Plumb. & Heating Equip. Wholesalers	1,780	● 1.9	-26.9%	(656)	(25)	-1.4%	5.8%
Building & Construction	4441	Building Material and Supplies Dealers	3,931	● 0.9	-20.2%	(994)	699	17.8%	4.9%
Building & Construction	4442	Lawn and Garden Equipment and Supplies Stores	192	● 0.4	-45.5%	(160)	(50)	-26.0%	0.6%
Consumer Goods Mftg	3352	Household Appliance Manufacturing	212	● 1.0	685.2%	185	91	42.9%	-10.3%
Consumer Goods Mftg	3399	Other Miscellaneous Manufacturing	753	● 0.7	-20.7%	(196)	140	18.6%	1.1%
Consumer Goods Mftg	4249	Misc. Nondurable Goods Merchant Wholesalers	990	● 0.7	-19.4%	(239)	(92)	-9.3%	-0.4%
Culture & Entertainment	5615	Travel Arrangement and Reservation Services	407	● 0.5	-15.6%	(75)	(78)	-19.2%	1.3%
Culture & Entertainment	7111	Performing Arts Companies	242	● 0.5	-9.0%	(24)	(128)	-52.9%	1.6%
Culture & Entertainment	7112	Spectator Sports	1,775	● 3.4	8.4%	137	300	16.9%	7.3%
Culture & Entertainment	7113	Promoters of Perf. Arts, Sports, & Similar Events	445	● 1.1	-24.7%	(146)	(38)	-8.5%	9.5%
Culture & Entertainment	7114	Agents & Managers for Artists, Athletes, & Others	117	● 1.4	-27.8%	(45)	5	4.3%	6.8%
Culture & Entertainment	7115	Independent Artists, Writers, and Performers	125	● 0.7	11.6%	13	20	16.0%	13.1%
Culture & Entertainment	7121	Museums, Historical Sites, and Similar Institutions	464	● 0.8	-17.4%	(98)	141	30.4%	8.8%
Culture & Entertainment	7131	Amusement Parks and Arcades	745	● 1.0	-8.9%	(73)	(67)	-9.0%	3.5%
Culture & Entertainment	7132	Gambling Industries	40	○ 0.1		40	40	100.0%	19.8%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Culture & Entertainment	7139	Other Amusement and Recreation Industries	6,606	● 1.5	59.4%	2,461	1,743	26.4%	9.3%
Culture & Entertainment	7211	Traveler Accommodation	5,403	● 0.8	-12.3%	(760)	436	8.1%	3.2%
Culture & Entertainment	7213	Rooming and Boarding Houses	45	● 1.0	-4.3%	(2)	1	2.2%	-1.9%
Culture & Entertainment	7221	Full-Service Restaurants	21,090	● 1.1	10.7%	2,046	2,044	9.7%	6.5%
Culture & Entertainment	7222	Limited-Service Eating Places	20,591	● 1.2	15.2%	2,716	3,050	14.8%	6.5%
Culture & Entertainment	7223	Special Food Services	2,133	● 0.9	-0.1%	(2)	136	6.4%	4.3%
Culture & Entertainment	7224	Drinking Places (Alcoholic Beverages)	1,725	● 1.2	26.4%	360	183	10.6%	1.9%
Education	6111	Elementary and Secondary Schools (Private)	2,902	● 1.0	35.2%	755	379	13.1%	13.4%
Education	6112	Junior Colleges (Private)	119	● 0.5	-27.0%	(44)	(5)	-4.2%	14.3%
Education	6113	Colleges, Universities, & Prof. Schools (Private)	3,674	● 0.7	41.8%	1,083	663	18.0%	11.7%
Education	6114	Bus. Schools & Comp. & Mgmt. Training (Private)	383	● 1.2	-20.0%	(96)	6	1.6%	3.0%
Education	6115	Technical and Trade Schools (Private)	235	● 0.4	-21.9%	(66)	(18)	-7.7%	14.1%
Education	6116	Other Schools and Instruction (Private)	1,311	● 1.0	24.6%	259	108	8.2%	16.8%
Education	6117	Educational Support Services (Private)	308	● 0.6	51.7%	105	77	25.0%	23.6%
Electronics	3341	Computer & Peripheral Equipment Manufacturing	719	● 1.1	-39.0%	(460)	(204)	-28.4%	-12.6%
Electronics	3342	Communications Equipment Manufacturing	56	○ 0.1	154.5%	34	47	83.9%	-8.5%
Electronics	3343	Audio and Video Equipment Manufacturing	149	● 1.8	-20.3%	(38)	(60)	-40.3%	-22.3%
Electronics	3344	Semiconductor & Other Elect. Component Mfg.	402	● 0.3	-61.3%	(638)	(322)	-80.1%	-14.0%
Electronics	3345	Nav., Measur., Electromedical, & Control Inst. Mfg.	62	○ 0.0	-17.3%	(13)	(7)	-11.3%	-0.4%
Electronics	3346	Mfg. and Reproducing Magnetic and Optical Media	1,213	● 12.3	-7.6%	(100)	173	14.3%	-13.1%
Electronics	3359	Other Electrical Equipment & Component Mfg.	119	● 0.2	72.5%	50	(26)	-21.8%	-3.0%
Electronics	4236	Electrical & Electronic Goods Wholesalers	1,441	● 1.1	-10.3%	(165)	(135)	-9.4%	-0.2%
Electronics	4251	Wholesale Electronic Markets & Agents & Brokers	6,305	● 1.8	19.1%	1,010	856	13.6%	14.4%
Electronics	8112	Electronic & Precision Equip. Repair & Maintenance	191	● 0.5	-8.6%	(18)	(47)	-24.6%	2.8%
Energy	2131	Support Activities for Mining	18	○ 0.0	260.0%	13	3	16.7%	-1.1%
Energy	2211	Electric Power Gen., Transmission & Distribution	1,385	● 0.8	-23.9%	(434)	(526)	-38.0%	-3.7%
Energy	4235	Metal and Mineral Merchant Wholesalers	834	● 1.7	-14.5%	(141)	(60)	-7.2%	-0.5%
Energy	4247	Petroleum and Petroleum Products Wholesalers	299	● 0.8	13.3%	35	17	5.7%	-6.0%
Energy	4862	Pipeline Transportation of Natural Gas	18	○ 0.2		18	20	111.1%	-1.7%
Engineering, Design, & Cont	3231	Printing and Related Support Activities	1,658	● 0.9	-41.5%	(1,177)	(300)	-18.1%	-10.4%
Engineering, Design, & Cont	5111	Newspaper, Period., Book, & Directory Publishers	1,382	● 0.7	-46.4%	(1,197)	(400)	-28.9%	-10.1%

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Detailed Clusters, 4-Digit NAICS

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Engineering, Design, & Conte	5121	Motion Picture and Video Industries	698	0.5	-17.1%	(144)	(66)	-9.5%	5.9%
Engineering, Design, & Conte	5122	Sound Recording Industries	30	0.5	-63.0%	(51)	(5)	-16.7%	-16.8%
Engineering, Design, & Conte	5151	Radio and Television Broadcasting	2,101	2.4	16.7%	301	(147)	-7.0%	-0.2%
Engineering, Design, & Conte	5152	Cable and Other Subscription Programming	2,185	6.5	19.6%	358	629	28.8%	9.8%
Engineering, Design, & Conte	5413	Architectural, Engineering, and Related Services	7,404	1.3	-14.9%	(1,294)	613	8.3%	8.0%
Engineering, Design, & Conte	5414	Specialized Design Services	383	0.8	-17.8%	(83)	11	2.9%	13.8%
Engineering, Design, & Conte	5418	Advertising, Public Relations, and Related Services	1,196	0.7	-31.1%	(541)	(192)	-16.1%	3.0%
Finance	5211	Monetary Authorities-Central Bank	449	5.0	-44.8%	(364)	74	16.5%	3.3%
Finance	5221	Depository Credit Intermediation	23,607	3.3	1.3%	306	4,834	20.5%	3.4%
Finance	5222	Nondepository Credit Intermediation	4,788	2.2	-27.6%	(1,822)	(1,150)	-24.0%	-2.5%
Finance	5223	Activities Related to Credit Intermediation	1,168	1.1	-38.8%	(741)	51	4.4%	5.6%
Finance	5231	Sec. & Com. Contracts Intermediation & Brokerage	4,203	2.2	-19.5%	(1,019)	503	12.0%	3.1%
Finance	5232	Securities and Commodity Exchanges	11	0.4	120.0%	6	3	27.3%	3.7%
Finance	5239	Other Financial Investment Activities	4,756	3.3	16.3%	665	1,341	28.2%	6.8%
Finance	5241	Insurance Carriers	6,915	1.5	-9.6%	(733)	25	0.4%	-0.7%
Finance	5242	Agencies, Brokerages, & Other Ins. Activities	4,102	1.1	-0.7%	(27)	478	11.7%	7.6%
Finance	5251	Insurance and Employee Benefit Funds	194	1.0	65.8%	77	3	1.5%	5.0%
Finance	5259	Other Investment Pools and Funds	50	0.3	-27.5%	(19)	(9)	-18.0%	5.1%
Finance	5311	Lessors of Real Estate	1,706	0.7	-5.2%	(94)	111	6.5%	1.6%
Finance	5312	Offices of Real Estate Agents and Brokers	1,610	1.4	-37.9%	(983)	48	3.0%	5.2%
Finance	5313	Activities Related to Real Estate	3,172	1.4	5.5%	164	648	20.4%	6.1%
Furniture	3371	Household & Inst. Furniture & Kitchen Cabinet Mfg.	382	0.4	-41.1%	(267)	(45)	-11.8%	-4.3%
Furniture	3372	Office Furniture (including Fixtures) Manufacturing	101	0.3	-17.9%	(22)	(25)	-24.8%	-5.8%
Furniture	3379	Other Furniture Related Product Manufacturing	150	1.0	33.9%	38	30	20.0%	-6.3%
Furniture	4232	Furniture & Home Furnishing Wholesalers	886	2.3	41.3%	259	294	33.2%	1.6%
Government	5621	Waste Collection	426	0.7	43.4%	129	81	19.0%	8.7%
Government	5622	Waste Treatment and Disposal	183	0.5	-46.6%	(160)	(21)	-11.5%	10.4%
Government	5629	Remediation & Other Waste Management Svcs.	267	0.5	49.2%	88	67	25.1%	8.6%
Government	9011	Federal Government, Civilian	6,294	0.5	17.2%	925	317	5.0%	1.4%
Government	9012	Federal Government, Military	2,245	0.3	-4.3%	(100)	13	0.6%	0.8%
Government	9026	Education and Hospitals (State Government)	7,233	0.6	7.3%	493	150	2.1%	4.3%

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Detailed Clusters, 4-Digit NAICS

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Cluster	NAICS	Industry	2012		2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Employment			Growth	New Jobs	New Jobs	Local %	US %
Government	9029	State Government, Excluding Education & Hospitals	1,626	●	0.2	-7.5%	(132)	37	2.3%	3.8%
Government	9036	Education and Hospitals (Local Government)	33,470	●	0.9	11.1%	3,350	3,554	10.6%	4.8%
Government	9039	Local Government, Excluding Education & Hospitals	19,933	●	0.9	6.7%	1,255	2,548	12.8%	4.8%
Healthcare	6211	Offices of Physicians	10,123	●	1.0	28.6%	2,249	2,457	24.3%	14.0%
Healthcare	6212	Offices of Dentists	3,552	●	1.0	20.7%	609	766	21.6%	11.6%
Healthcare	6213	Offices of Other Health Practitioners	2,138	●	0.7	25.9%	440	299	14.0%	17.6%
Healthcare	6214	Outpatient Care Centers	1,611	●	0.6	58.4%	594	362	22.5%	15.1%
Healthcare	6216	Home Health Care Services	2,317	●	0.5	59.9%	868	601	25.9%	19.8%
Healthcare	6219	Other Ambulatory Health Care Services	1,110	●	1.0	25.9%	228	12	1.1%	8.1%
Healthcare	6221	General Medical and Surgical Hospitals (Private)	5,177	●	0.3	-5.9%	(326)	541	10.5%	6.6%
Healthcare	6223	Specialty Hospitals (Private)	1,360	●	1.5	2566.7%	1,309	302	22.2%	14.7%
Healthcare	6231	Nursing Care Facilities	2,988	●	0.4	7.4%	205	417	14.0%	10.7%
Healthcare	6232	Resid. Mental Health & Substance Abuse Facilities	1,690	●	0.7	28.8%	378	370	21.9%	9.0%
Healthcare	6233	Community Care Facilities for the Elderly	3,418	●	1.0	16.8%	492	580	17.0%	12.4%
Healthcare	6239	Other Residential Care Facilities	1,072	●	1.6	-0.1%	(1)	156	14.6%	8.8%
Healthcare	6241	Individual and Family Services	3,476	●	0.6	17.8%	524	1,581	45.5%	19.5%
Healthcare	6242	Com. Food & Housing, & Emerg. & Other Relief Svcs.	505	●	0.8	4.8%	23	74	14.7%	9.9%
Healthcare	6243	Vocational Rehabilitation Services	865	●	0.6	22.5%	159	200	23.1%	10.1%
Healthcare	6244	Child Day Care Services	3,283	●	1.0	-6.7%	(237)	333	10.1%	8.7%
Industrial Machinery	3331	Ag., Construction, & Mining Machinery Mfg.	252	●	0.3	-49.4%	(246)	(116)	-46.0%	-0.9%
Industrial Machinery	3332	Industrial Machinery Manufacturing	464	●	1.1	-40.4%	(315)	(246)	-53.0%	-13.2%
Industrial Machinery	3333	Commercial & Service Industry Machinery Mfg.	466	●	1.2	19.8%	77	72	15.5%	-2.1%
Industrial Machinery	3334	HVAC & Commercial Refrigeration Equip. Mfg.	549	●	1.1	14.9%	71	(130)	-23.7%	-9.8%
Industrial Machinery	3335	Metalworking Machinery Manufacturing	427	●	0.7	-27.3%	(160)	(77)	-18.0%	-4.9%
Industrial Machinery	3336	Engine, Turbine, & Power Transmission Equip. Mfg.	1,322	●	3.4	15.6%	178	(79)	-6.0%	-2.9%
Industrial Machinery	3339	Other General Purpose Machinery Manufacturing	1,704	●	1.8	10.4%	161	(19)	-1.1%	-4.5%
Industrial Machinery	3351	Electric Lighting Equipment Manufacturing	319	●	1.8	6280.0%	314	(98)	-30.7%	-11.6%
Industrial Machinery	3353	Electrical Equipment Manufacturing	120	●	0.2	-53.8%	(140)	(90)	-75.0%	-9.4%
Industrial Machinery	4234	Prof. & Com. Equip. & Supplies Wholesalers	4,261	●	1.7	15.5%	572	438	10.3%	0.2%
Industrial Machinery	4238	Machinery, Equip. & Supplies Wholesalers	6,481	●	2.6	-11.5%	(839)	183	2.8%	2.1%
Industrial Machinery	4239	Misc. Durable Goods Merchant Wholesalers	653	●	0.5	-19.8%	(161)	(261)	-40.0%	4.7%

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Cluster	NAICS	Industry	2012		2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Employment			Growth	New Jobs	New Jobs	Local %	US %
Industrial Machinery	8113	Com. & Ind. Machinery & Equip. Repair & Maint.	585	●	0.8	-20.9%	(155)	50	8.5%	3.3%
Logging & Metal/Mineral Mi	1153	Support Activities for Forestry	99	●	1.7	50.0%	33	6	6.1%	-0.1%
Logging & Metal/Mineral Mi	2123	Nonmetallic Mineral Mining and Quarrying	106	●	0.3	-53.3%	(121)	7	6.6%	-2.9%
Materials	3221	Pulp, Paper, and Paperboard Mills	257	●	0.6	-39.8%	(170)	(11)	-4.3%	-18.9%
Materials	3222	Converted Paper Product Manufacturing	1,747	●	1.6	11.8%	184	(200)	-11.4%	-10.3%
Materials	3251	Basic Chemical Manufacturing	285	●	0.5	-55.6%	(357)	(190)	-66.7%	-11.0%
Materials	3252	Resin, Synth. Rubber, & Synth. Fibers Mfg.	186	●	0.5	-19.8%	(46)	(51)	-27.4%	-6.9%
Materials	3255	Paint, Coating, and Adhesive Manufacturing	207	●	0.9	-4.6%	(10)	54	26.1%	-1.0%
Materials	3256	Soap, Cleaning Compound, & Toilet Prep. Mfg.	343	●	0.8	-36.9%	(201)	(44)	-12.8%	-3.2%
Materials	3259	Other Chemical Product & Prep. Mfg.	431	●	1.3	-20.9%	(114)	51	11.8%	-7.6%
Materials	3261	Plastics Product Manufacturing	2,092	●	1.0	-6.1%	(137)	(432)	-20.7%	-4.9%
Materials	3262	Rubber Product Manufacturing	387	●	0.8	-59.5%	(569)	(76)	-19.6%	-8.6%
Materials	4241	Paper and Paper Product Merchant Wholesalers	769	●	1.6	-13.9%	(124)	68	8.8%	-5.2%
Materials	4246	Chemical & Allied Products Merchant Wholesalers	948	●	1.9	-9.4%	(98)	(136)	-14.3%	-2.6%
Metalworking	3311	Iron and Steel Mills and Ferroalloy Manufacturing	384	●	1.1	44.9%	119	40	10.4%	-6.2%
Metalworking	3312	Steel Product Manufacturing from Purchased Steel	19	○	0.1	-80.6%	(79)	(14)	-73.7%	-4.0%
Metalworking	3313	Alumina and Aluminum Production and Processing	50	●	0.2	85.2%	23	(19)	-38.0%	-8.5%
Metalworking	3314	Nonferrous Metal Production and Processing	15	○	0.1	-11.8%	(2)	(10)	-66.7%	-7.7%
Metalworking	3315	Foundries	392	●	0.8	-18.2%	(87)	(20)	-5.1%	-11.8%
Metalworking	3321	Forging and Stamping	170	●	0.5	-17.1%	(35)	(45)	-26.5%	-8.8%
Metalworking	3322	Cutlery and Handtool Manufacturing	214	●	1.4	20.9%	37	47	22.0%	-16.9%
Metalworking	3323	Architectural and Structural Metals Manufacturing	554	●	0.4	-56.0%	(705)	(84)	-15.2%	1.9%
Metalworking	3324	Boiler, Tank, & Shipping Container Manufacturing	234	●	0.7	-39.2%	(151)	(105)	-44.9%	-5.3%
Metalworking	3326	Spring and Wire Product Manufacturing	144	●	0.9	-45.9%	(122)	(105)	-72.9%	-11.1%
Metalworking	3327	Machine Shops; Turned Prod.; & Screw, Nut, & Bolt	430	●	0.3	-4.0%	(18)	(38)	-8.8%	-4.3%
Metalworking	3328	Coating, Engr., Heat Treating, & Allied Activities	251	●	0.5	-23.0%	(75)	(27)	-10.8%	-5.8%
Metalworking	3329	Other Fabricated Metal Product Manufacturing	572	●	0.6	19.7%	94	(20)	-3.5%	-5.4%
Metalworking	3365	Railroad Rolling Stock Manufacturing	32	●	0.4		32	3	9.4%	-10.7%
Non-Profits	8131	Religious Organizations	642	●	0.8	-4.6%	(31)	305	47.5%	5.6%
Non-Profits	8132	Grantmaking and Giving Services	438	●	0.8	-9.5%	(46)	48	11.0%	6.9%
Non-Profits	8133	Social Advocacy Organizations	165	●	0.2	-24.7%	(54)	28	17.0%	7.4%

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Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Non-Profits	8134	Civic and Social Organizations	719	● 0.4	-76.2%	(2,302)	(459)	-63.8%	5.6%
Non-Profits	8139	Business, Prof., Labor, Political, & Similar Orgs.	731	● 0.4	0.3%	2	232	31.7%	6.6%
Professional Services	5411	Legal Services	5,161	● 1.1	-1.8%	(94)	450	8.7%	6.5%
Professional Services	5412	Accounting, Tax Prep., Bookkeeping, & Payroll Svcs.	5,446	● 1.4	-4.9%	(282)	422	7.7%	7.2%
Professional Services	5419	Other Professional, Scientific, & Technical Svcs.	1,990	● 0.8	-7.5%	(161)	105	5.3%	8.5%
Professional Services	5511	Management of Companies and Enterprises	24,875	● 3.2	7.3%	1,697	636	2.6%	3.1%
Research	5416	Mgmt., Scientific, & Technical Consulting Svcs.	10,131	● 2.1	22.6%	1,866	3,707	36.6%	28.1%
Research	5417	Scientific Research and Development Services	832	● 0.3	78.2%	365	139	16.7%	9.8%
Retail	4411	Automobile Dealers	4,217	● 1.0	-17.0%	(866)	191	4.5%	-2.0%
Retail	4412	Other Motor Vehicle Dealers	302	● 0.6	-22.0%	(85)	25	8.3%	7.4%
Retail	4413	Automotive Parts, Accessories, and Tire Stores	1,936	● 0.9	7.2%	130	180	9.3%	1.0%
Retail	4421	Furniture Stores	1,114	● 1.3	-30.1%	(480)	96	8.6%	1.6%
Retail	4422	Home Furnishings Stores	1,608	● 1.8	-17.7%	(346)	356	22.1%	2.6%
Retail	4431	Electronics and Appliance Stores	3,185	● 1.6	-16.9%	(647)	(215)	-6.8%	2.9%
Retail	4451	Grocery Stores	8,482	● 0.8	2.9%	237	(230)	-2.7%	2.3%
Retail	4452	Specialty Food Stores	248	● 0.3	-49.5%	(243)	(96)	-38.7%	-4.9%
Retail	4453	Beer, Wine, and Liquor Stores	245	● 0.4	6.5%	15	(70)	-28.6%	1.7%
Retail	4461	Health and Personal Care Stores	4,401	● 1.1	-0.8%	(34)	332	7.5%	6.6%
Retail	4471	Gasoline Stations	1,795	● 0.5	-13.3%	(276)	(2)	-0.1%	-2.3%
Retail	4481	Clothing Stores	4,899	● 1.1	-11.0%	(606)	647	13.2%	3.6%
Retail	4482	Shoe Stores	725	● 0.9	-20.5%	(187)	(15)	-2.1%	0.1%
Retail	4483	Jewelry, Luggage, and Leather Goods Stores	478	● 0.8	-25.3%	(162)	(16)	-3.3%	-4.9%
Retail	4511	Sporting Goods, Hobby, & Musical Instr. Stores	1,708	● 0.9	-10.2%	(195)	17	1.0%	4.9%
Retail	4512	Book, Periodical, and Music Stores	531	● 1.0	-13.0%	(79)	84	15.8%	-10.2%
Retail	4521	Department Stores	6,577	● 1.1	-2.7%	(180)	228	3.5%	-3.3%
Retail	4529	Other General Merchandise Stores	4,013	● 0.6	11.6%	416	925	23.1%	15.1%
Retail	4531	Florists	179	● 0.7	-28.7%	(72)	(19)	-10.6%	-10.5%
Retail	4532	Office Supplies, Stationery, and Gift Stores	1,708	● 1.4	-4.2%	(75)	(139)	-8.1%	-7.1%
Retail	4533	Used Merchandise Stores	761	● 1.4	5.1%	37	(32)	-4.2%	7.7%
Retail	4539	Other Miscellaneous Store Retailers	955	● 0.9	0.3%	3	(127)	-13.3%	2.2%
Retail	4541	Electronic Shopping and Mail-Order Houses	121	○ 0.1	42.4%	36	28	23.1%	6.3%

Mecklenburg County, NC Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012		2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Employment	2012 LQ	Growth	New Jobs	New Jobs	Local %	US %
Retail	4542	Vending Machine Operators	127	0.8	17.6%	19	(79)	-62.2%	-0.7%
Retail	4543	Direct Selling Establishments	204	0.4	-29.2%	(84)	(37)	-18.1%	-6.7%
Retail	5321	Automotive Equipment Rental and Leasing	1,241	1.8	-26.3%	(442)	(14)	-1.1%	2.5%
Retail	5322	Consumer Goods Rental	491	0.7	-39.2%	(317)	(41)	-8.4%	-1.0%
Retail	5323	General Rental Centers	336	2.1	5.3%	17	190	56.5%	-0.9%
Retail	5324	Com. & Ind. Machinery & Equip. Rental & Leasing	500	1.0	-11.8%	(67)	34	6.8%	0.9%
Retail	5331	Lessors of Nonfinancial Intangible Assets	15	0.1	-86.5%	(96)	(10)	-66.7%	9.6%
Retail	8111	Automotive Repair and Maintenance	2,640	0.8	-11.9%	(356)	188	7.1%	4.0%
Retail	8114	Personal & Household Goods Repair & Maint.	258	1.0	-21.8%	(72)	(18)	-7.0%	-2.2%
Retail	8121	Personal Care Services	2,542	1.0	8.1%	190	399	15.7%	11.4%
Retail	8122	Death Care Services	205	0.4	2.5%	5	(33)	-16.1%	1.2%
Retail	8123	Drycleaning and Laundry Services	1,286	1.0	-26.0%	(451)	(228)	-17.7%	-0.8%
Retail	8129	Other Personal Services	1,354	1.3	-11.8%	(182)	15	1.1%	6.0%
Retail	8141	Private Households	1,022	0.4	13.4%	121	(47)	-4.6%	13.6%
Software / Info. Tech.	5112	Software Publishers	517	0.5	92.2%	248	232	44.9%	13.1%
Software / Info. Tech.	5182	Data Processing, Hosting, and Related Services	5,693	5.7	-7.8%	(482)	57	1.0%	15.6%
Software / Info. Tech.	5191	Other Information Services	638	0.9	146.3%	379	73	11.4%	12.2%
Software / Info. Tech.	5415	Computer Systems Design and Related Services	6,226	1.0	15.3%	824	701	11.3%	17.7%
Telecom Services	5171	Wired Telecommunications Carriers	2,369	1.0	-8.8%	(228)	(578)	-24.4%	-4.0%
Telecom Services	5172	Wireless Telecom. Carriers (except Satellite)	734	1.1	5.2%	36	(63)	-8.6%	5.1%
Telecom Services	5174	Satellite Telecommunications	10	0.2	-56.5%	(13)	2	20.0%	13.7%
Telecom Services	5179	Other Telecommunications	1,535	3.5	-5.8%	(94)	152	9.9%	-4.3%
Transportation & Logistics	4811	Scheduled Air Transportation	6,048	3.6	7.0%	398	182	3.0%	1.1%
Transportation & Logistics	4812	Nonscheduled Air Transportation	30	0.2	-60.0%	(45)	(3)	-10.0%	7.0%
Transportation & Logistics	4821	Rail Transportation	156	0.2	-17.0%	(32)	(8)	-5.1%	0.3%
Transportation & Logistics	4831	Deep Sea, Coastal, & Great Lakes Water Transp.	521	3.3	32.9%	129	132	25.3%	2.6%
Transportation & Logistics	4841	General Freight Trucking	6,367	1.7	-25.9%	(2,226)	136	2.1%	4.3%
Transportation & Logistics	4842	Specialized Freight Trucking	862	0.5	-26.3%	(307)	(32)	-3.7%	4.9%
Transportation & Logistics	4851	Urban Transit Systems	154	0.9	-35.6%	(85)	62	40.3%	11.4%
Transportation & Logistics	4852	Interurban and Rural Bus Transportation	733	10.0	-1.9%	(14)	35	4.8%	-3.0%
Transportation & Logistics	4853	Taxi and Limousine Service	167	0.6	3.7%	6	24	14.4%	1.7%

Mecklenburg County, NC
Detailed Clusters, 4-Digit NAICS

With 10 or More Employees

Cluster	NAICS	Industry	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
					Growth	New Jobs	New Jobs	Local %	US %
Transportation & Logistics	4855	Charter Bus Industry	79	● 0.7	-30.1%	(34)	11	13.9%	0.1%
Transportation & Logistics	4859	Other Transit & Ground Passenger Transportation	23	○ 0.1	-36.1%	(13)	(7)	-30.4%	10.6%
Transportation & Logistics	4881	Support Activities for Air Transportation	429	● 0.6	-13.3%	(66)	38	8.9%	10.7%
Transportation & Logistics	4882	Support Activities for Rail Transportation	119	● 1.2	24.0%	23	44	37.0%	2.8%
Transportation & Logistics	4884	Support Activities for Road Transportation	423	● 1.2	-13.1%	(64)	88	20.8%	11.1%
Transportation & Logistics	4885	Freight Transportation Arrangement	1,489	● 2.0	-10.9%	(182)	124	8.3%	4.4%
Transportation & Logistics	4889	Other Support Activities for Transportation	35	● 0.3	-61.5%	(56)	(6)	-17.1%	-4.1%
Transportation & Logistics	4921	Couriers and Express Delivery Services	2,845	● 1.5	-18.4%	(643)	206	7.2%	1.9%
Transportation & Logistics	4922	Local Messengers and Local Delivery	211	● 1.2	34.4%	54	67	31.8%	0.6%
Transportation & Logistics	4931	Warehousing and Storage	1,899	● 0.7	-3.6%	(70)	408	21.5%	7.6%
Total	10	Total	551,707	● 1.0	-3.2%	(18,316)	52,150	9.5%	5.2%

Source: Avalanche Consulting using data from EMSI

Occupation Clusters

Mecklenburg County, NC

Mecklenburg County's three **largest clusters** by employment size are Back Office/Admin Support (96,100 employees), Hospitality (68,500), and Personal Services (58,300).

The county's three **fastest growing clusters of the past 5 years** (2007 to 2012) were Medical (18% growth, 6,900 new jobs), Hospitality (5%, 3,200), and Social Service (8%, 1,800).

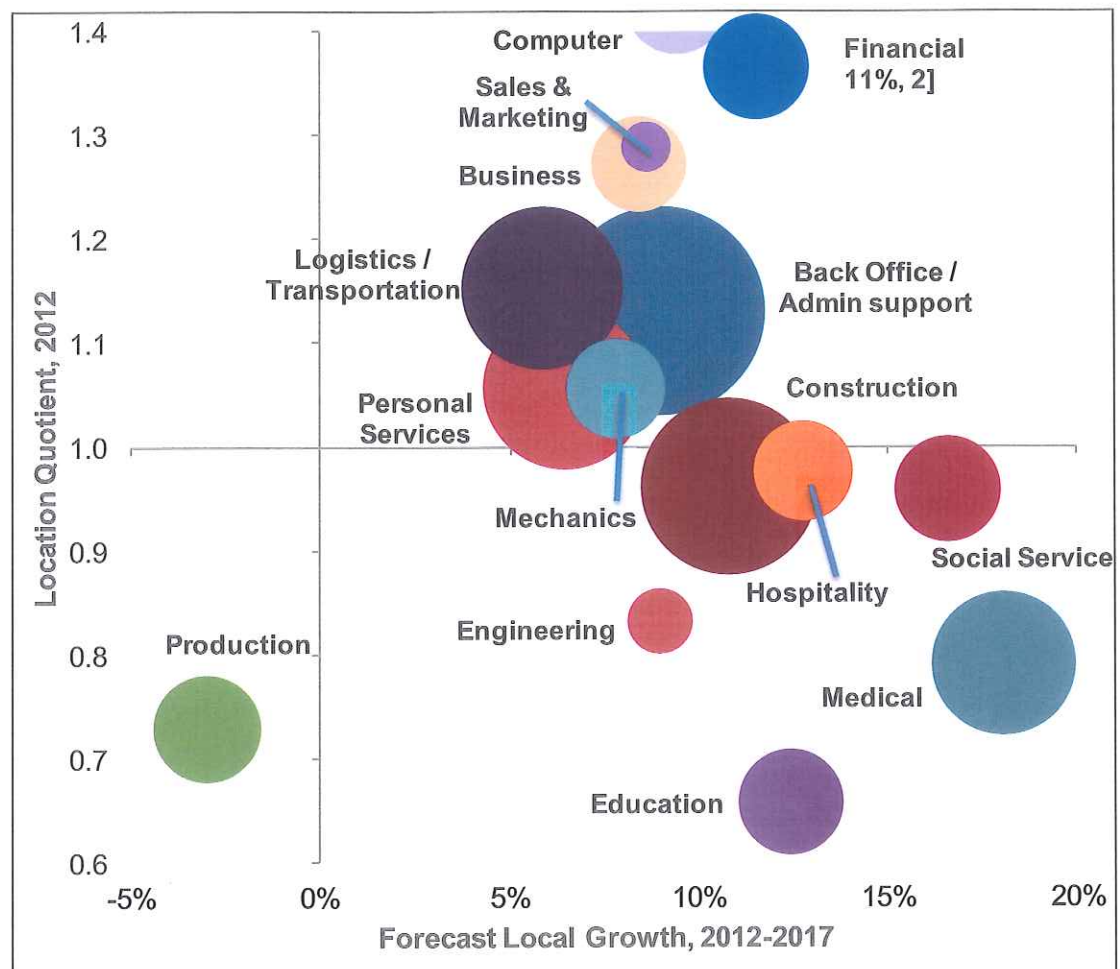
The three **fastest forecasted growth clusters** (2012 to 2017) for the county are: Political (19% forecast growth), Medical (18%), and Agriculture (17%). *[Note: Forecasts from EconomicModeling.com]*

The county's **clusters with the highest concentration** (highest Location Quotient) are Financial (LQ=2.1), Computer (1.4), and Sales & Marketing (1.3). These clusters represent the areas of greatest specialization and competitiveness for the county.

Small, emerging clusters – those with a low LQ but forecasted high growth rates – include Agriculture, Political, and Medical.

Declining clusters of the past 5 years include Construction, which employs 21,700 workers, has an LQ of 1, and lost 28% of its employment base (8,400 jobs) in the last five years. Logistics/Transportation employs 57,600, LQ=1, and lost 11% (6,800 jobs). Production employs 25,000, LQ=.7, and lost 16% (4,700 jobs).

Occupation Clusters: Mecklenburg County, NC



Source: Avalanche Consulting using data from EMSI

Note: Largest 15 by Employment Size (Bubble Size)

Occupation Cluster Competitiveness

Mecklenburg County, NC

Cluster	2012 Employment	2012 LQ	2007-2012 Job Creation		Forecast, '12-'17 Growth		
			Growth	New Jobs	New Jobs	Local %	US %
Agriculture	1,171	○ 0.28	0.3%	3	199	17.0%	4.3%
Architecture	908	● 1.22	-30.9%	(406)	(4)	-0.4%	4.4%
Back Office / Admin support	96,060	● 1.13	-3.9%	(3,920)	8,648	9.0%	4.1%
Business	20,317	● 1.27	-3.0%	(626)	1,707	8.4%	3.6%
Communications	2,534	● 0.95	-5.8%	(157)	131	5.2%	6.6%
Computer	24,120	● 1.43	3.2%	740	2,275	9.4%	7.7%
Construction	21,733	● 0.98	-28.0%	(8,444)	2,773	12.8%	5.8%
Design	3,353	● 1.00	-6.8%	(243)	135	4.0%	4.3%
Education	23,824	● 0.66	7.8%	1,724	2,964	12.4%	7.1%
Engineering	9,373	● 0.83	-2.7%	(263)	842	9.0%	5.5%
Financial	31,427	● 2.06	-3.0%	(977)	3,413	10.9%	6.8%
Geology	89	○ 0.08	-24.6%	(29)	4	4.5%	2.5%
Hospitality	68,473	● 0.96	5.0%	3,246	7,397	10.8%	5.7%
Legal	4,689	● 0.93	-2.0%	(94)	430	9.2%	5.9%
Logistics / Transportation	57,569	● 1.15	-10.5%	(6,772)	3,376	5.9%	2.5%
Math	565	● 1.22	7.4%	39	62	11.0%	8.1%
Mechanics	22,176	● 1.06	-6.1%	(1,452)	1,732	7.8%	4.0%
Medical	45,456	● 0.79	17.9%	6,907	8,206	18.1%	12.2%
Manufacturing	759	● 0.52	-16.0%	(145)	(36)	-4.7%	3.3%
Military	2,245	○ 0.26	-4.3%	(100)	13	0.6%	0.8%
Sales & Marketing	5,354	● 1.29	-2.6%	(143)	461	8.6%	2.5%
Performance	1,870	● 0.90	17.7%	281	262	14.0%	8.6%
Political	388	● 0.84	2.1%	8	73	18.8%	8.0%
Production	24,989	● 0.73	-15.9%	(4,721)	(749)	-3.0%	-1.6%
Personal Services	58,345	● 1.06	-7.3%	(4,617)	3,770	6.5%	3.9%
Social Service	24,292	● 0.96	7.9%	1,779	4,027	16.6%	7.1%
All Occupations	551,707	1.00	-3.2%	(18,316)	52,150	9.5%	5.2%

Source: Avalanche Consulting using data and forecasts from EMSI (EconomicModeling.com)

Prosperity for Greater Charlotte Project

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www.Prosperty for Greater Charlotte.com
www.ConnectOurFuture.org

The Centralina Economic Development Commission (CEDC), established in 2005 by Centralina Council of Governments, promotes a diversified and innovative regional economic base, advocates sustainable growth, and supports jobs development through expansion, retention, and recruitment of business and industry. The CEDC region of nine counties, also delineated as North Carolina COG Region F, is designated by the U.S. Department of Commerce, Economic Development Administration (EDA) as the approved Centralina Economic Development District (EDD). The CEDC is responsible for developing and maintaining the regional Centralina Comprehensive Economic Development Strategy (CEDS).

Our CEDS economic development planning process has been integrated with the CONNECT Our Future regional project framework and will provide key components to the bi-state Greater Charlotte 2011 HUD Sustainable Communities Grant. This strategic planning will provide an approach to growth and prosperity for a world class region that supports businesses and job growth and ensures globally competitive vibrant and resilient communities.



Vibrant Communities – Robust Region



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Project
Consulting Team:

