



NORTH CAROLINA VISION 2030

PROGRESS ASSESSMENT



FALL 2017

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North Carolina Vision 2030 – A Plan for Accelerating Job Growth and Securing North Carolina's Future is coordinated by the North Carolina Chamber Foundation. The forward-thinking, initiative-driven plan provides focused economic development strategies around its four “Pillars of a Secure Future”, which include Education and Talent Supply, Competitive Business Climate, Entrepreneurship and Innovation, and Infrastructure and Growth Leadership.

Employment Growth

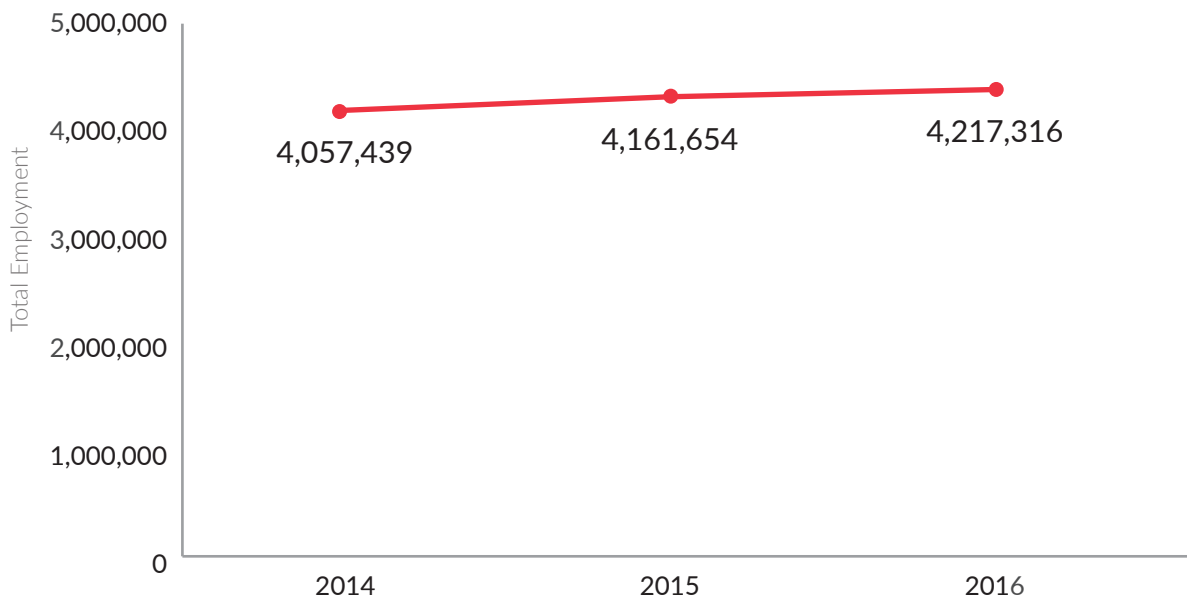


VISION 2030 – Add one million jobs by 2030, an average of 62,500 per year.

GOALS 2016 to 2020 – 310,000 new jobs
2020 to 2025 – 332,000 new jobs
2025 to 2030 – 358,000 new jobs

RESULTS 2014 to 2016 – 159,877 net new jobs added, average 79,938 per year (28% above goal).

North Carolina 2014 to 2016



Source: Bureau of Labor Statistics. 2017. QCEW

North Carolina's net new jobs from 2014 to 2016 totaled 159,877, or 79,938 per year, 28% above the goal of 62,500 per year. If this success continues, the state would meet its million-new job goal and exceed that goal by more than a quarter of a million jobs. North Carolina job growth in early 2017 has slowed slightly.

Earnings Growth

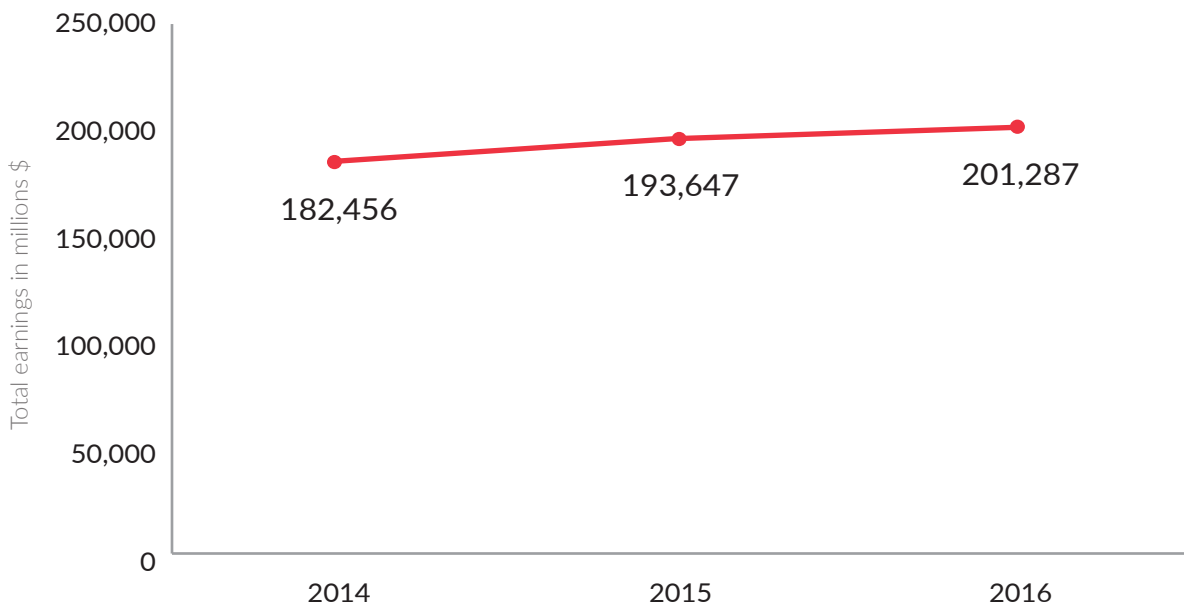


VISION 2030 – Raise total earnings by \$7.5 billion annually.

GOAL 2014 to 2016 – \$15.0 billion.

RESULTS 2014 to 2016 – \$18.8 billion earnings gain (25.3% above goal).

North Carolina 2014 to 2016



Source: Bureau of Labor Statistics. 2017. QCEW

Overall earnings growth increased by almost \$19 billion in the first two years of the plan, an average of \$9.4 billion each year, or 25% greater than the goal of the plan. A combination of higher earnings for the more than 4 million existing workers, combined with new earnings for the almost 16,000 additional workers, created robust new earnings. If earnings meet the goal, North Carolina will have more than \$100 billion in earnings growth by 2030.

Consumer Spending

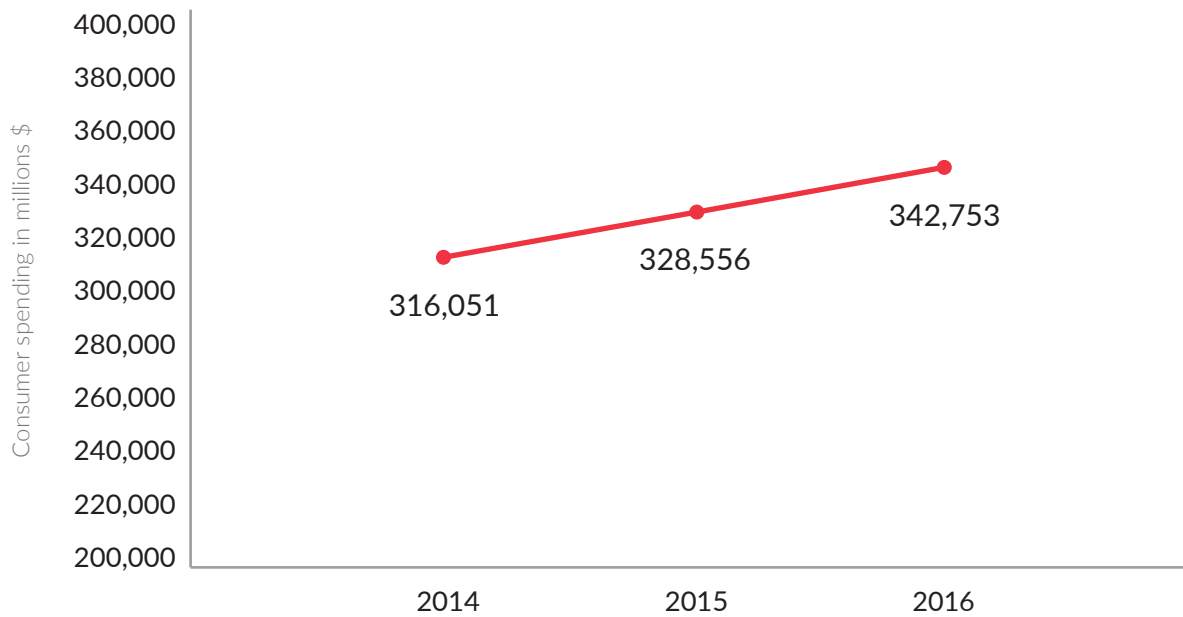


VISION 2030 – Grow consumer spending by \$4.1 billion annually.

GOAL 2014 to 2016 – \$8.2 billion consumer spending gain.

RESULTS 2014 to 2016 – \$26.7 billion consumer spending gain (325% above goal).

North Carolina 2014 to 2016



Source: Bureau of Economic Analysis
 "Total personal consumption expenditures (PCE) by state (millions of dollars)"

Bank Deposits



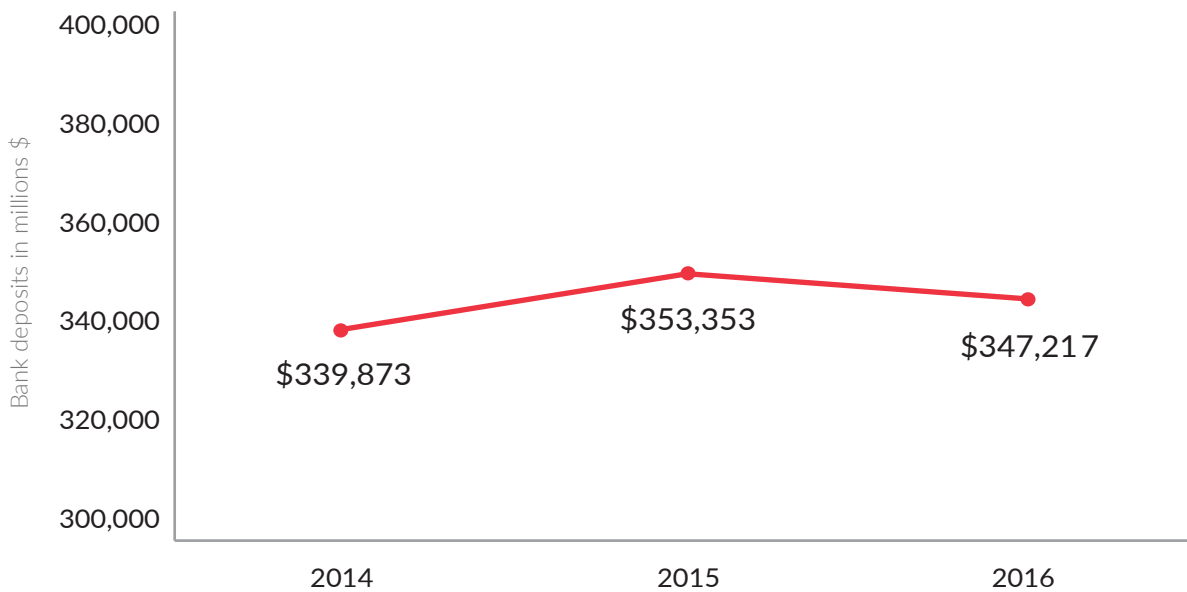
VISION 2030 – Raise deposits in North Carolina banks by \$652 million annually.

GOAL 2014 to 2016 – \$1.304 billion.

RESULTS 2014 to 2016 – 7.4 billion gain (multiple times greater than the goal).

OVERALL GOALS

North Carolina 2014 to 2016



Source: FDIC & ibanknet.com

According to the FDIC, bank deposits grew about 4% between 2014 and 2015 and then dropped slightly from 2015 to 2016.

High School Graduation Rate

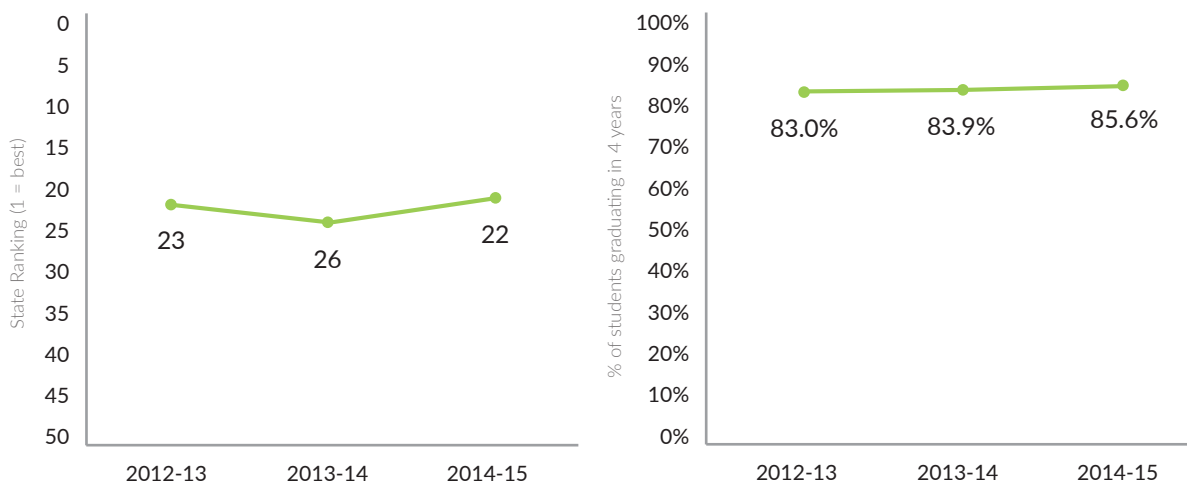


VISION 2030 – Improve the high school graduation rate to 90% by 2030.

GOALS At time of Vision 2030 launch – 83%.
 by 2020 – 86%
 by 2025 – 88%
 by 2030 – 90%

RESULTS 2014 to 2015 – 85.6%.

North Carolina 2012-13 to 2014-15



Source: National Center for Education Statistics. "Common Core Data."

North Carolina's high school graduation rate continues to improve and is now approaching 86%, the 2030 goal for 2020. Unless there are setbacks, the 2030 goal should be met. As the state gets closer to the 2030 goal of 90%, progress will probably slow. In 2014-15, North Carolina was tied for 22nd best state, ranked with Delaware and Illinois.

The NCES report for 2015-16 has not yet been released. While DPS releases graduation rates for North Carolina, Vision 2030 uses NCES statistics to normalize for all states.

4th Grade Reading Proficiency

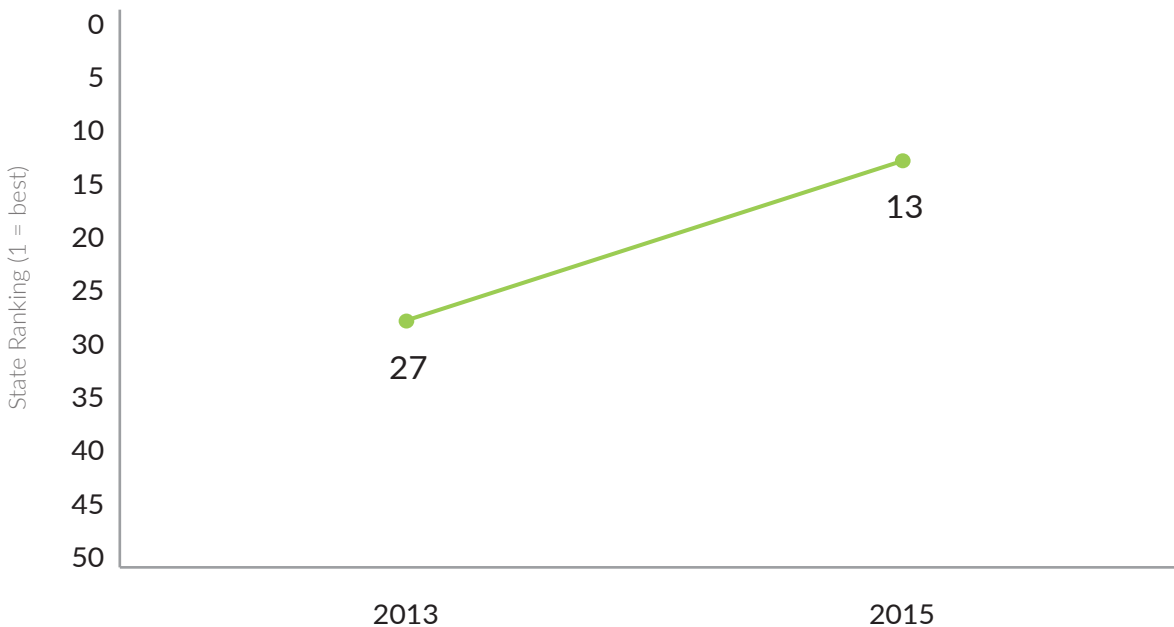


VISION 2030 – Raise fourth grade reading proficiency to a top 20 state nationally.

GOALS At time of Vision 2030 launch – ranked 28th.
by 2020 – 25th
by 2025 – 22nd
by 2030 – 19th

RESULTS 2015 – NC ranked 13th.

North Carolina 2013 to 2015



Source: National Center for Education Statistics. 2016. "NAEP Data Explorer." Average composite scores are released every 2 years.

2013: North Carolina tied for 27th rank with Georgia and Maryland.

2015: North Carolina tied for 13th rank with Utah and Washington.

North Carolina's rank improved significantly between 2013 and 2015. New data will not be available for some time, information is released every two years and the next data is expected in 2018.

4th Grade Math Proficiency

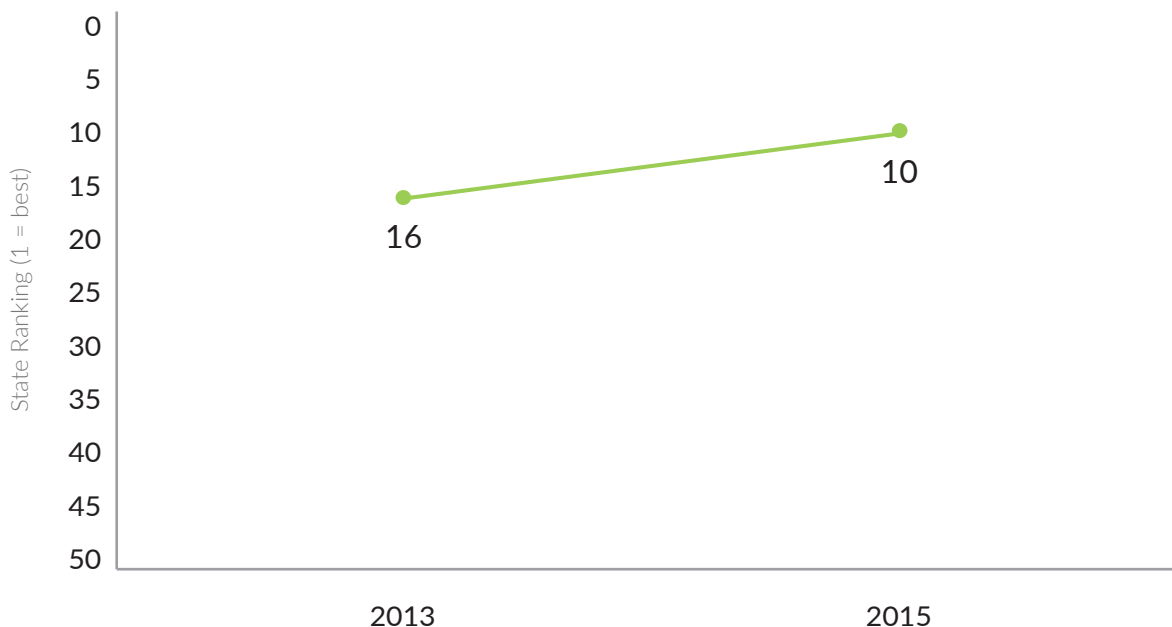


VISION 2030 – Raise fourth grade math proficiency to a top 15 state nationally.

GOALS At time of Vision 2030 launch – ranked 17th.
 by 2020 – 16th
 by 2025 – 15th
 by 2030 – 14th

RESULTS 2015 – North Carolina ranked 10th.

North Carolina 2013 to 2015



Source: National Center for Education Statistics. 2016. "NAEP Data Explorer."
 Average composite scores are released every 2 years.

North Carolina's rank improved significantly between 2013 and 2015. New data will not be available for some time.

2013: North Carolina tied for 16th rank with Maryland and Wisconsin. (Report showed North Carolina ranked 17th, however North Carolina was tied second in alphabetical order with Maryland for 16th).

2015: North Carolina tied for 10th rank with Nebraska, Ohio and Texas.

4th Grade Reading Proficiency

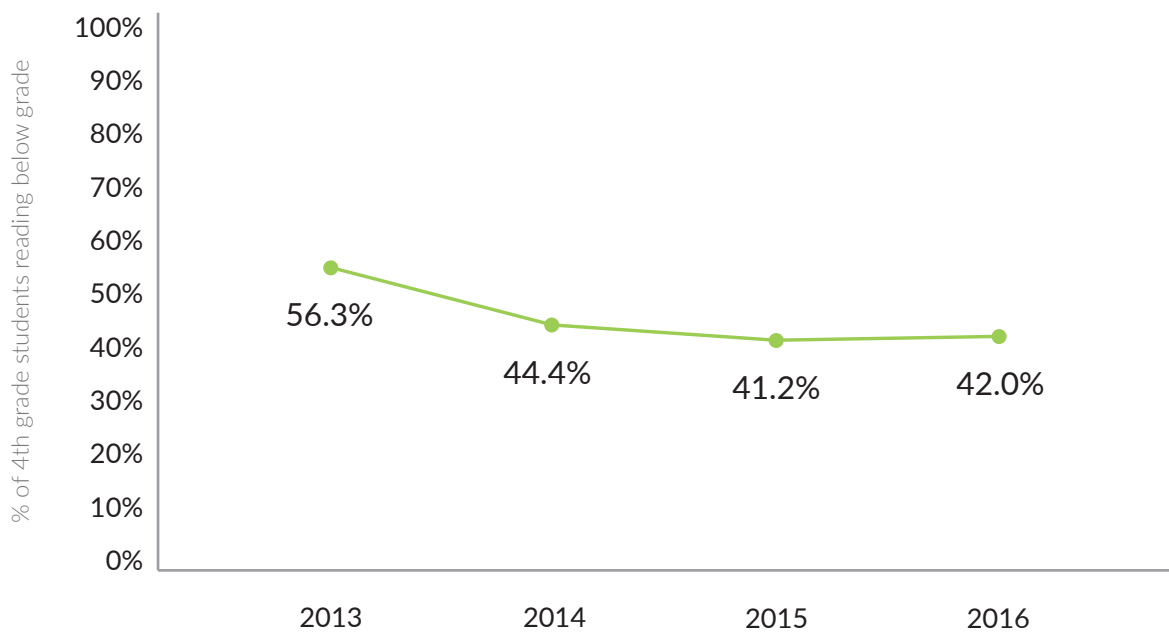


VISION 2030 – Reduce the number of fourth graders reading below basic levels by 32%.

GOALS Reduce the number of fourth graders reading below basic levels by 32%.

RESULTS 23.9% reduction in number of 4th graders reading below grade proficiency from 2013 – 2016.

North Carolina 2013 to 2016



Source: NC Public Schools, Accountability Reporting

North Carolina has made significant progress between 2013 and 2016 in the percentage of 4th graders reading below grade level. The number of fourth graders is difficult to find, but the drop in percentage shows that the 2030 goal is being met.

8th Grade Reading Proficiency

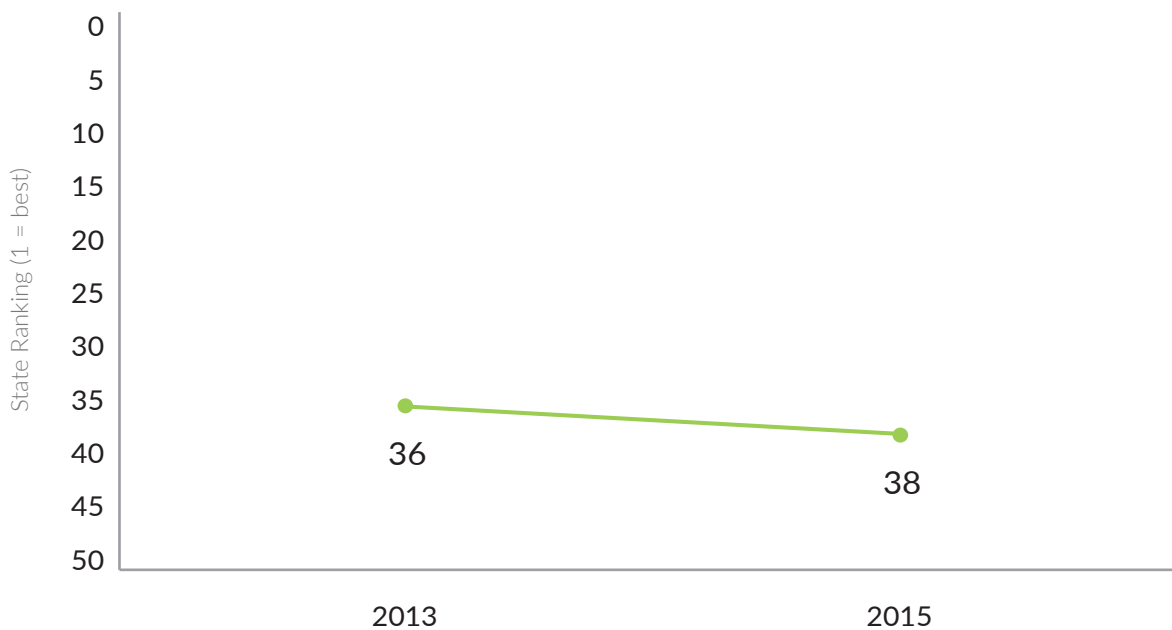


VISION 2030 – Raise eighth grade reading proficiency to top half of states nationally.

GOALS At time of Vision 2030 launch – ranked 36th.
 by 2020 – 31st
 by 2025 – 27th
 by 2030 – 24th

RESULTS 2015 – North Carolina ranked 38th.

North Carolina 2011 to 2015



Source: National Center for Education Statistics. 2016. "NAEP Data Explorer."
 Average composite scores are released every 2 years.

2013: North Carolina tied for 36th rank with Georgia and Tennessee.

2015: North Carolina tied for 38th rank with Texas.

No progress has been made so far on this goal.

8th Grade Math Proficiency

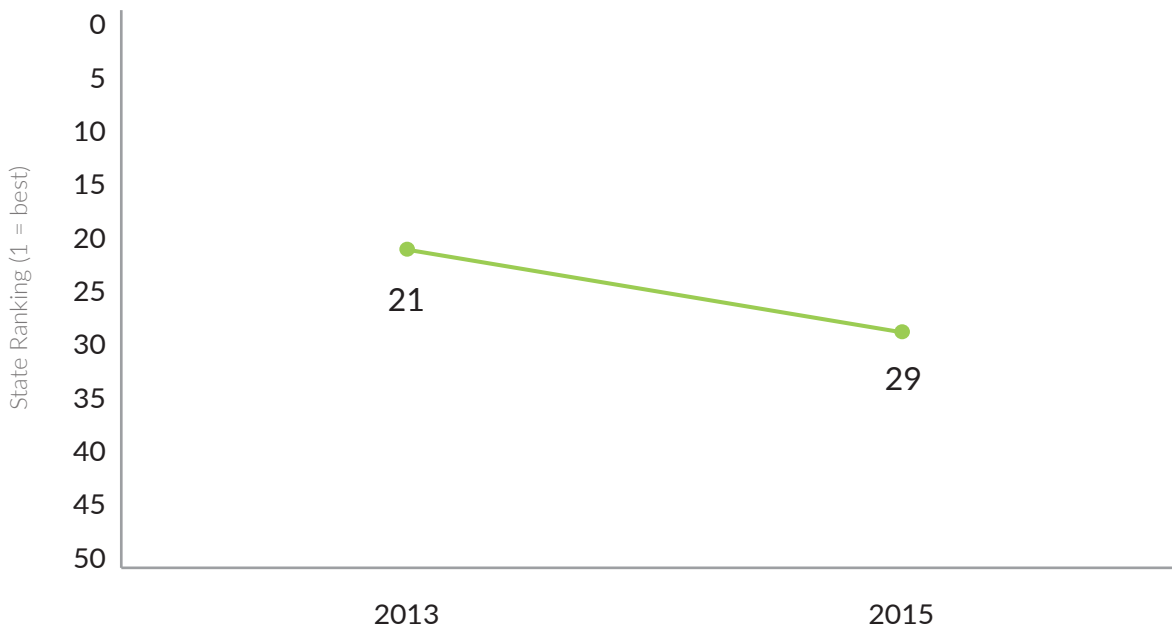


VISION 2030 – Raise eighth grade math proficiency to a top 20 state nationally.

GOALS At time of Vision 2030 launch – ranked 22nd.
by 2020 – 21st
by 2025 – 19th
by 2030 – 17th

RESULTS 2015 North Carolina – ranked 29th.

North Carolina 2013 to 2015



Source: National Center for Education Statistics. 2016. "NAEP Data Explorer." Average composite scores are released every 2 years.

2013: North Carolina tied for 21st rank with Idaho.

2015: North Carolina tied for 29th rank with Rhode Island and Missouri.

North Carolina is not making progress on this goal. (In the original plan, North Carolina was ranked 22nd. But was actually tied for 21st and was 22nd only because Idaho is alphabetically first.)

Public University and Community College Tuition Rates

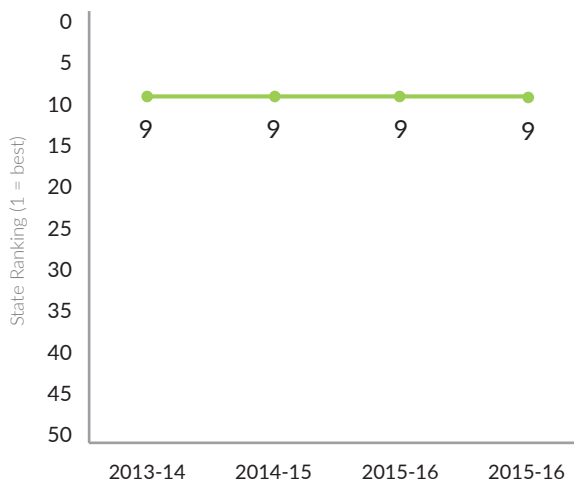


VISION 2030 – Maintain one of the lowest tuition rates nationally for public community colleges and universities.

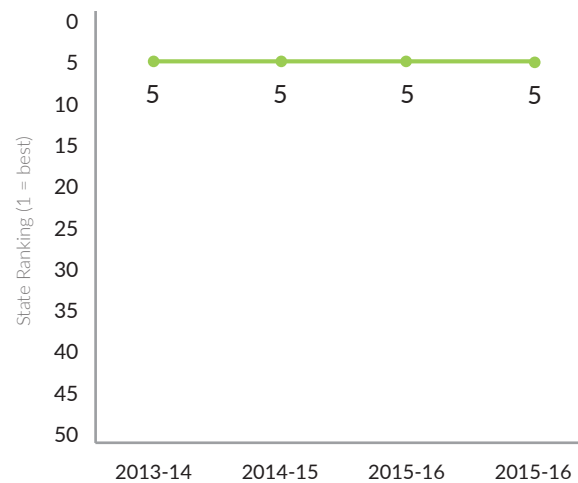
GOAL Consistent top 5 state nationally.

RESULTS 2016–17 – Public 4-year college tuition ranked 9th nationally.
2016–17 – Community College tuition ranked 5th nationally.

North Carolina Public 4-Year College Tuition National Ranking



North Carolina Community College Tuition National Ranking



Source: National Center for Education Statistics. 2016. "NAEP Data Explorer." Average composite scores are released every 2 years.

North Carolina is meeting this goal during a volatile time for public higher education costs and remains one of the lowest cost higher education states in the country. This ranking does not reflect overall affordability, since most tuitions are rising, it just shows relative position.

Community College Graduation Rates



LACK OF
NEW DATA

VISION 2030 – Increase community college graduation or certificate rates by 15% by 2030.

GOAL In 2013, 19.3% of students who started in Fall 2010 graduated (includes post-secondary certificate) in 3 years, or 150% of the time. This is the most recent information available.

- by 2020 – 5% increase
- by 2025 – 10% increase
- by 2030 – 15% increase

RESULTS 2013 – North Carolina ranked 18th.

Source: National Student Clearinghouse Research Center

No new data has been released to measure this goal.

University Graduation Rates

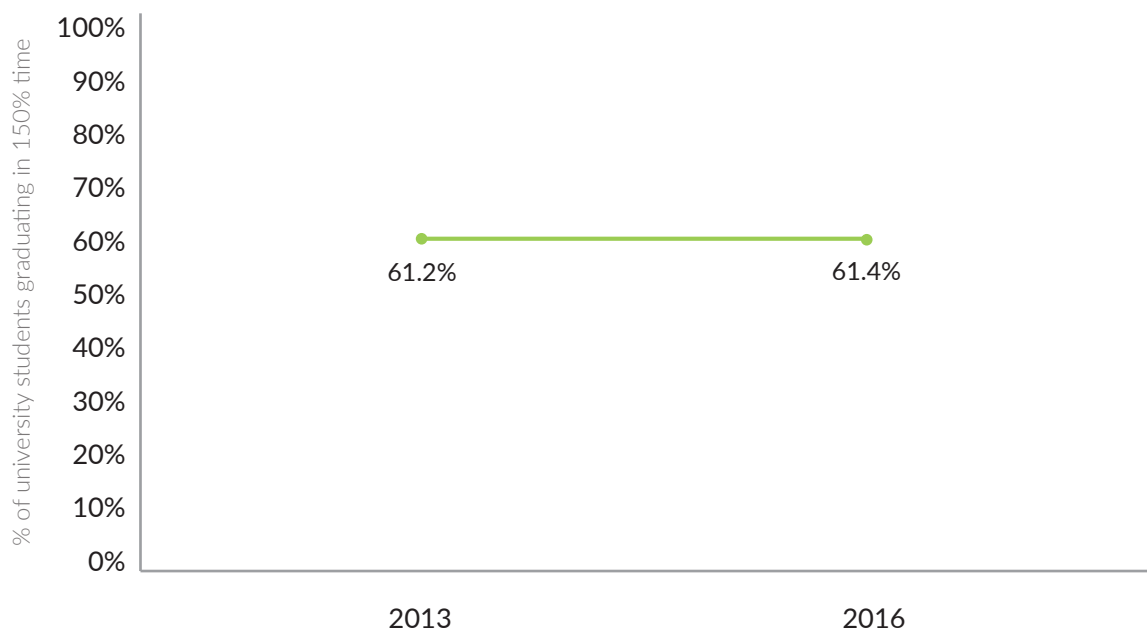


VISION 2030 – Increase university graduation rates by 9% by 2030.

GOALS At time of Vision 2030 launch – In 2013, 61.2% of students who started in Fall 2007 graduated in 6 years, or 150% of the time. North Carolina ranked 14th.
 by 2020 – 3% increase
 by 2025 – 6% increase
 by 2030 – 9% increase

RESULTS In 2016, 61.4% of students who started Fall of 2010 graduated in 6 years. North Carolina ranked 7th.

North Carolina 2013 to 2016



Source: The Chronicle of Higher Education, College Completion & National Student Clearinghouse Research Center

While North Carolina's graduation rate for public university's percentage did not change significantly, our relative position improved compared to other states. Rates continue to vary greatly between institutions. The Statistical Abstract for 2015-16 is not yet available.

Population with Post High School Degree or Credential



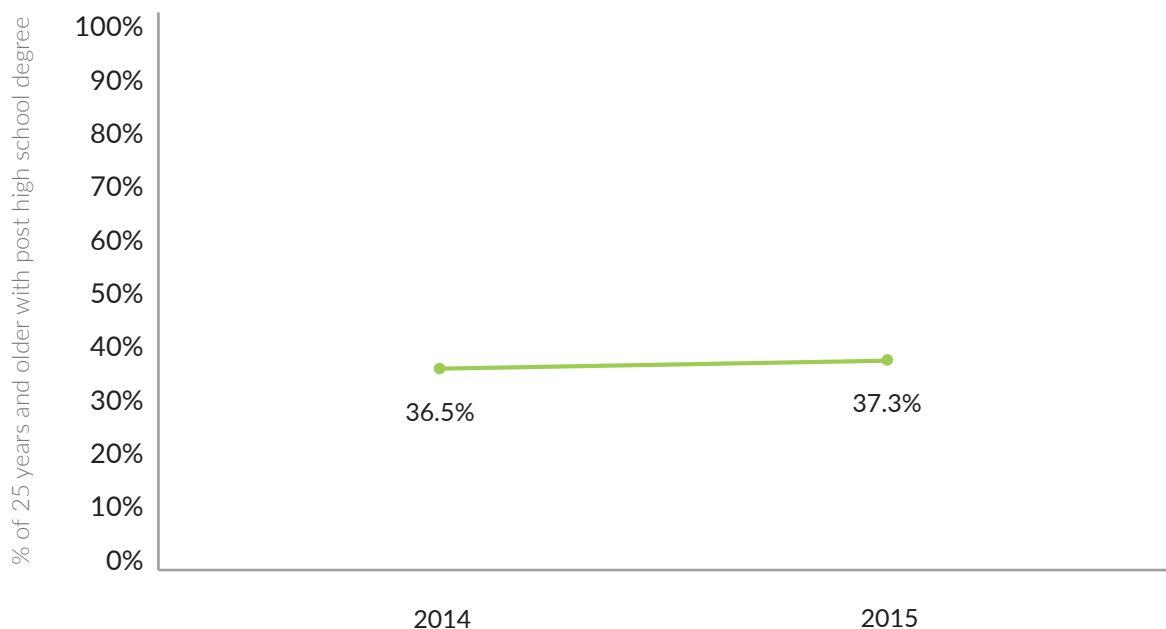
LACK OF
NEW DATA

VISION 2030 – Increase the number of North Carolina adults with a post high school degree or credential to 60%.

GOALS At time of Vision 2030 launch – 36.5% of North Carolina adults over age 25 had a post high school degree (AA, BA, Graduate & Professional).

RESULTS 2015 – 37.3% of North Carolina adults over age 25 had a post high school degree (AA, BA, Graduate & Professional).

North Carolina 2014 to 2015



Source: U.S. census Bureau, 2017. Accessed through American Factfinder

In 2013, North Carolina public universities and community colleges awarded 18,655 certificates. In 2014, North Carolina public universities and community colleges awarded 22,217 certificates. This is the most recent data available.

Source: NCES “Statistical Abstract for Higher Education 2014-15”

We could not find a standard source that counts adults with a post high school credential for all states. It seems clear that the number of credentials is rising, up 19% between 2013-2014, but new information lags several years. 2015 data should be available later this year.

Postsecondary Science, Technology, Engineering & Math Degrees

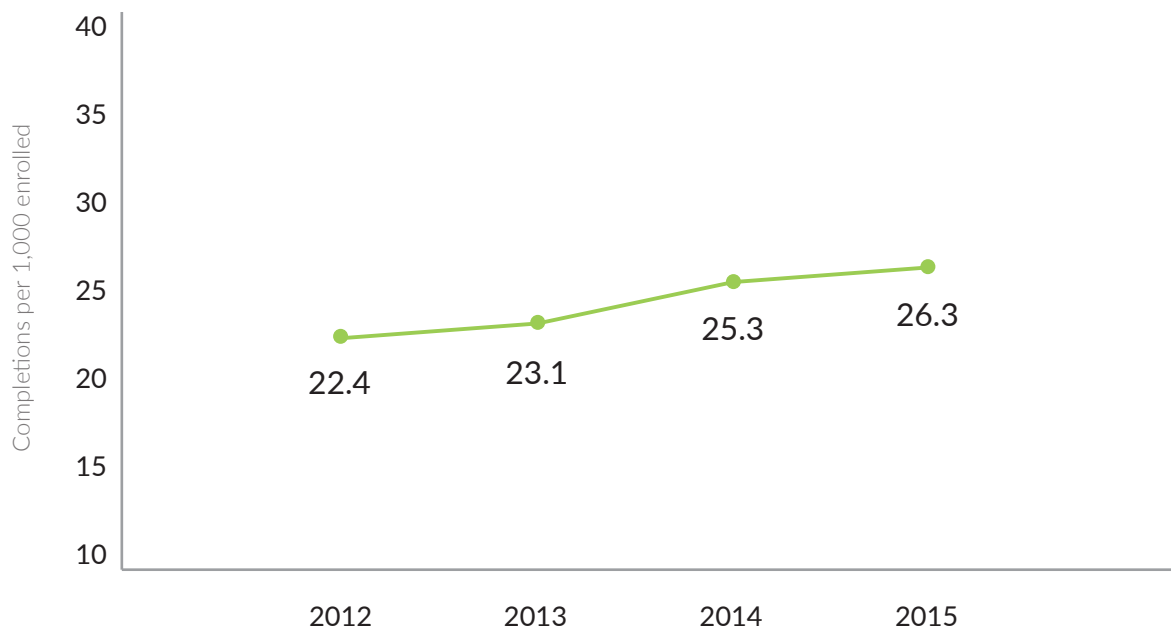


VISION 2030 – Increase number of STEM BA degrees by 10%.

GOALS At time of Vision 2030 launch – 2013 STEM completions per 1,000 students enrolled was 23.1.
 by 2020 – 3% increase
 by 2025 – 7% increase
 by 2030 – 10% increase

RESULTS 2015 North Carolina STEM completions per 1,000 students enrolled was 26.3, a 13.8% increase in the completion rate.

North Carolina 2012 to 2015



Source: Economic Modeling Specialists International (EMSI). 2016. Dashboard uses same sources of NCES and US Census through the National Science Foundation, where 2013 is latest available

Progress is clearly happening, but data on this specific goal is difficult. The best information available is from EMSI Modeling data. This report provided the completions per 1,000 enrolled students, but not specific numbers.

Legal Climate

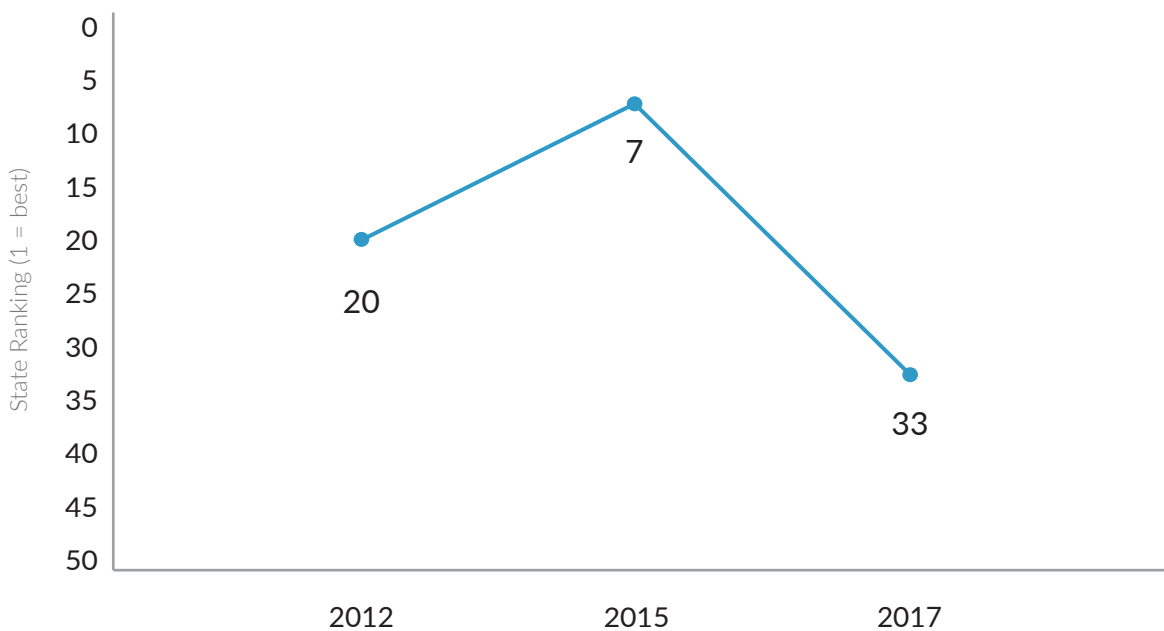


VISION 2030 – Obtain and maintain a top 10 ranking for legal climate and fairness of litigation environment, improving from the 2012 State of Liability System Survey** ranking of 20th.

GOALS At time of Vision 2030 launch – North Carolina was ranked as 20th.
by 2020 – 16th rank
by 2025 – 13th rank
by 2030 – 10th rank

RESULTS 2017 State of Liability System Survey ranked North Carolina 33rd.

North Carolina 2012 to 2015



Source: Institute for Legal Reform. 2017. "Legal Climate Overall Rankings by State."
**The State of Liability System Survey is published by the Institute for Legal Reform

North Carolina's legal climate continues to improve and is currently among the best nationally. However, as other states push aggressively to be more competitive, they are impacting North Carolina's ranking.

Regulatory Climate

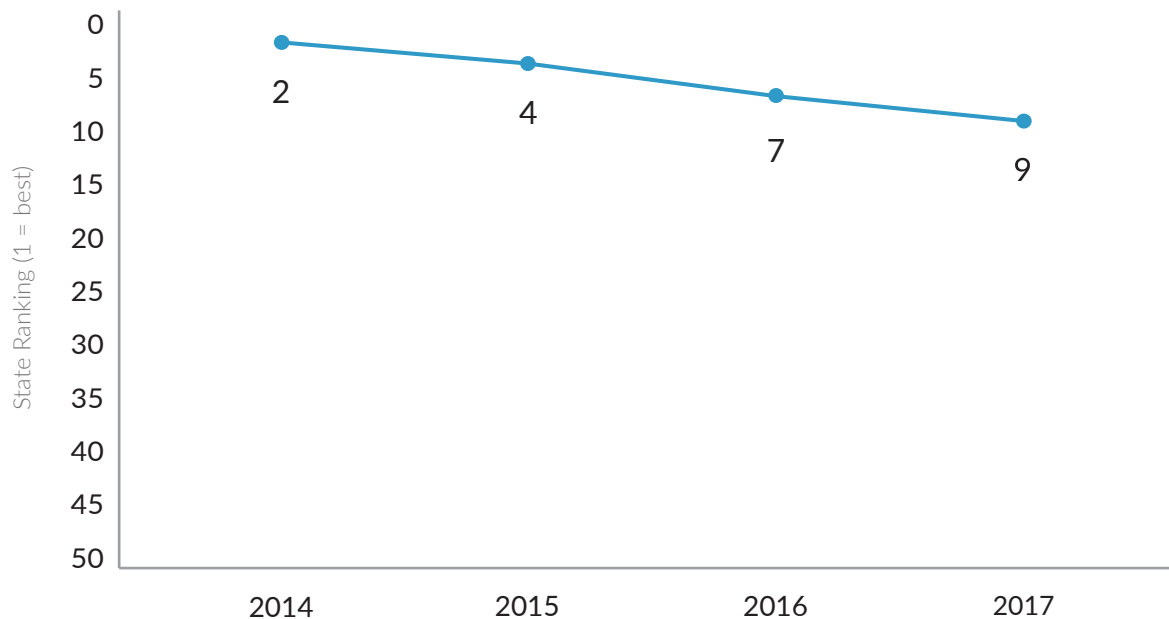


VISION 2030 – Secure a number one ranking from Forbes for regulatory climate.

GOALS At time of Vision 2030 launch – North Carolina was ranked as 2nd.
 by 2020 – 1st rank
 by 2025 – 1st rank
 by 2030 – 1st rank

RESULTS 2016 Forbes Best-States-For-Business, Regulatory Climate ranked North Carolina 9th.

North Carolina 2012 to 2015



Source: Forbes Best-States-For-Business. "Regulatory Climate Overall Rankings by State."

In 2017, North Carolina ranked 9th behind IN, VA, UT, NE, FL, SC, GA and TN. Although NC has dropped from 2nd to 9th, it does not reflect a worsening of North Carolina's specific climate, just our relative position.

Unemployment Rate

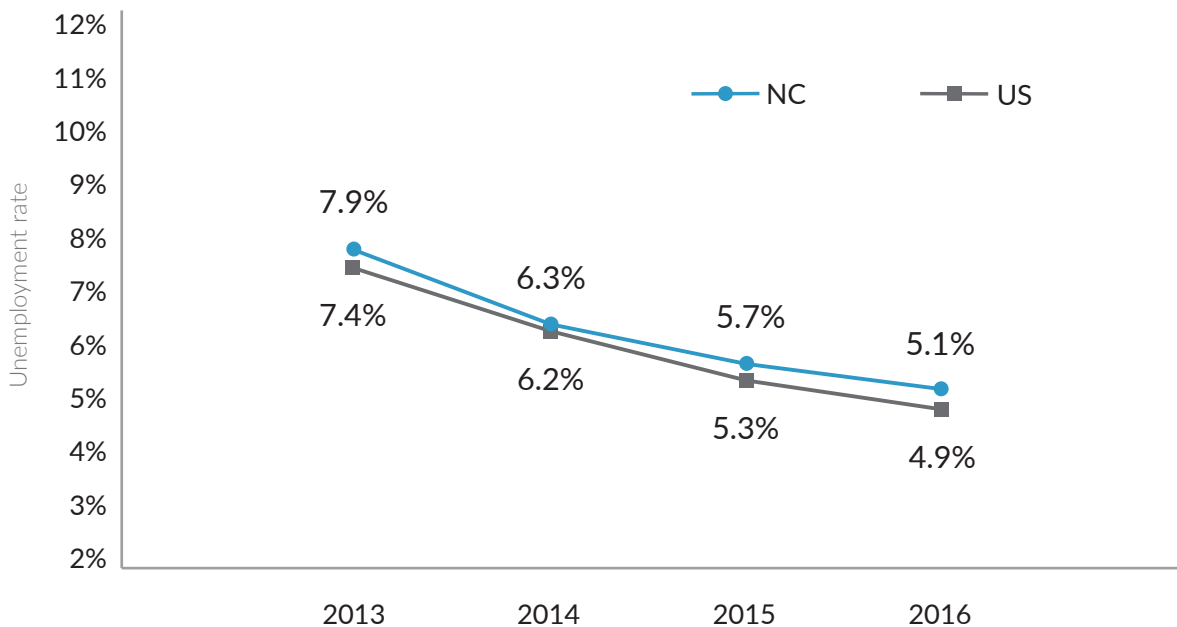


VISION 2030 – Maintain a state unemployment rate below the national average.

GOALS At time of Vision 2030 launch – North Carolina’s 2013 annual unemployment rate was 7.9% compared to the US unemployment rate of 7.4%.

RESULTS North Carolina’s 2016 annual unemployment rate is 5.1% compared to the US unemployment rate of 4.9%.

North Carolina 2012 to 2015



Source: Bureau of Labor Statistics (BLS), 2017. "Local Area and State Unemployment."

While North Carolina’s rate has been reduced significantly from 2013 (7.9%) to 2016 (5.2%), it remains slightly above the national average.

Business Share of State and Local Taxes

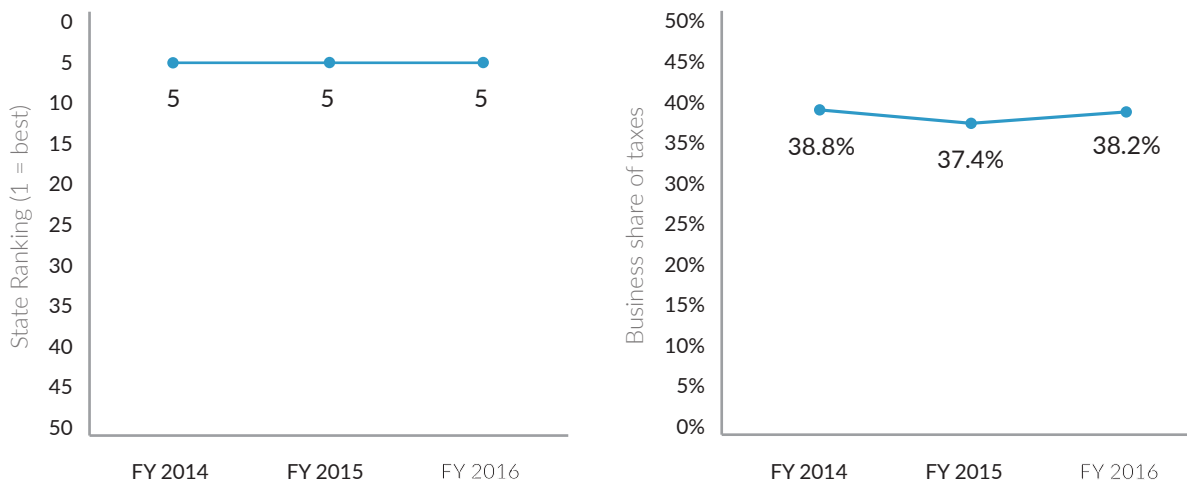


VISION 2030 - Continue to have a top 10 lowest business share of state and local taxes, based on Ernst and Young's annual assessment.

GOALS At time of Vision 2030 launch - North Carolina was ranked 5th for FY 2014 with 38.8% business share of state and local taxes.

RESULTS NC was ranked 5th for FY 2016 with 38.2% business share of state and local taxes.

North Carolina FY 2014 to FY 2015



Source: Ernst and Young "Total State and Local Business Taxes"

North Carolina has maintained its top 5 position and has seen the percentage of business state and local taxes reduced slightly.

Union Membership



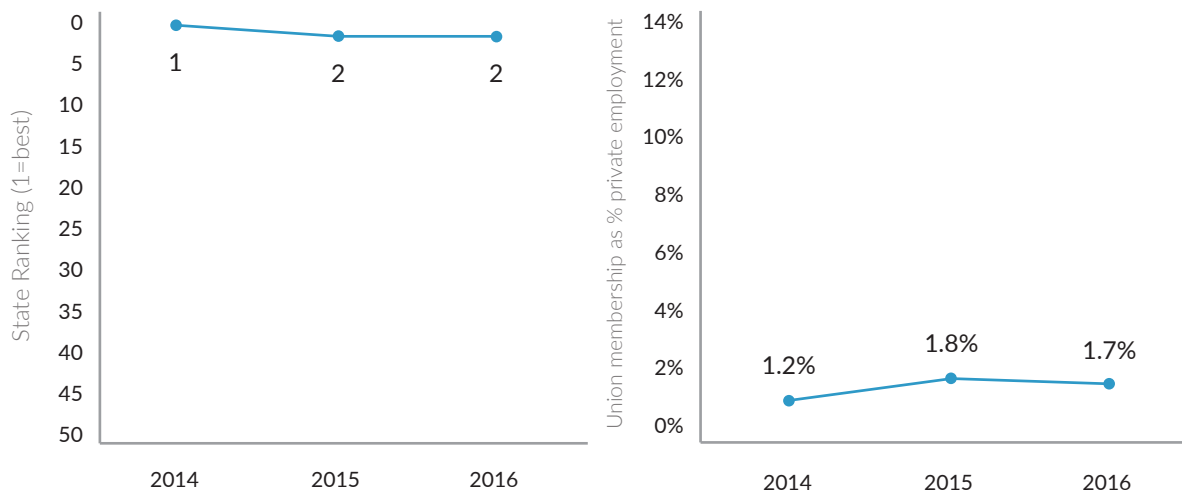
CURRENTLY
NUMBER 2

VISION 2030 – Maintain state’s #1 position as the state with lowest union membership percentage.

GOALS At time of Vision 2030 launch – North Carolina was ranked 1st for 2014 with 1.2% union membership as a percentage of private employment.

RESULTS NC was ranked 2nd for 2016 with 1.7% union membership as a percentage of private employment. South Carolina was ranked 1st with 0.8%.

North Carolina 2014 to 2016



Source: UnionStats.com 2017. Barry Hirsch, Georgia State University, "Union Membership and Coverage Database from the Current Population Survey: Note,"

North Carolina’s union percentage rose slightly and the state is now ranked as second lowest behind South Carolina.

Average Compensation Per Job

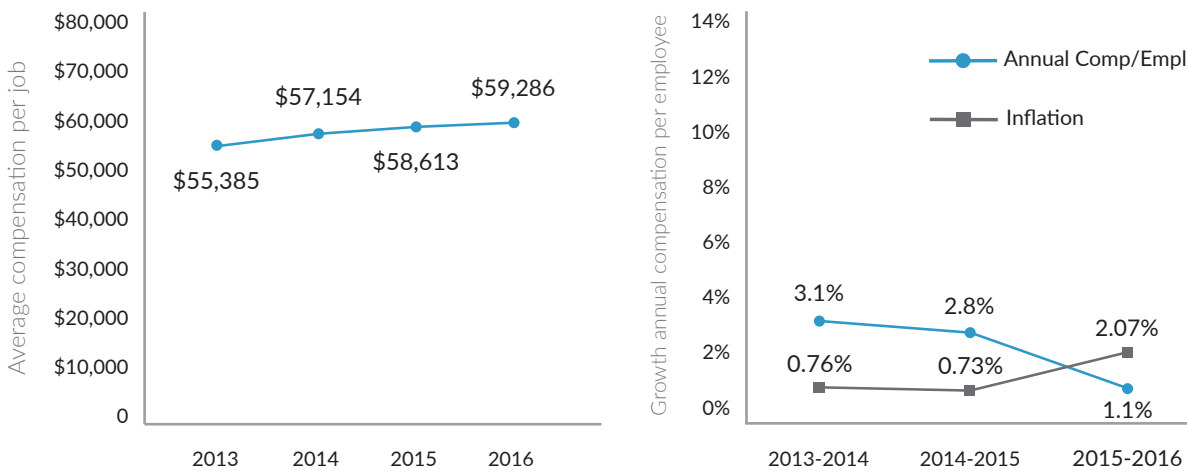


VISION 2030 – Increase average compensation per job in excess of annual inflation rate.

GOALS At time of Vision 2030 launch – North Carolina average compensation per job was \$55,385 in 2013.

RESULTS NC average compensation grew 7.04% from 2013 to 2016, while inflation grew 3.56%.

North Carolina 2013 to 2015



Source: US Bureau of Economic Analysis (BEA). 2017. "Compensation of Employees by NAICS Industry" and US Bureau of Labor Statistics. 2017. "CPI Inflation Calculator"

Average compensation per job continues to grow. Although growth from 2015 to 2016 did not exceed the inflation rate, the three year growth in average compensation of 7.04% was about double the three year inflation rate of 3.56%.

Real GDP Per Capita

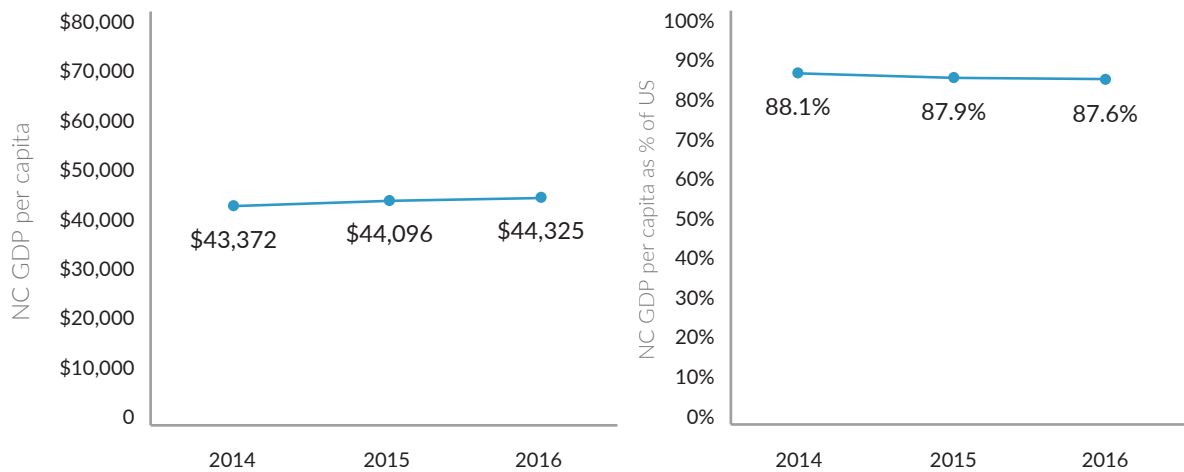


VISION 2030 – Be above the national average for real gross domestic product per capita.

GOALS At time of Vision 2030 launch – North Carolina GDP per capita in 2014 was \$43,372 while US GDP per capita in 2014 was \$49,253. North Carolina GDP per capita was 88.1% of US GDP per capita for 2014.
by 2020 – close the gap by 1/3
by 2025 – close the gap by 2/3
by 2030 – close the gap

RESULTS NC GDP per capita in 2016 was \$44,325 while US GDP per capita in 2016 was \$50,577. North Carolina GDP per capita was 87.6% of US GDP per capita for 2016.

North Carolina 2014 to 2016



Source: Bureau of Economic Analysis (BEA). 2017. "Per Capita Real GDP by State."

North Carolina has lost ground, slightly, since 2014.

Per Capita Personal Income

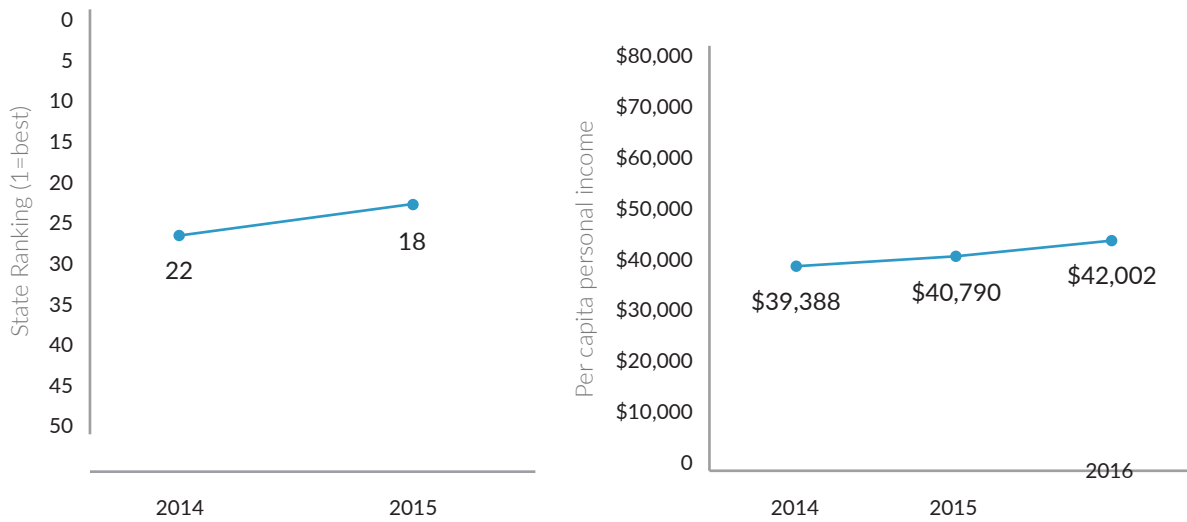


VISION 2030 – Be a top 20 state for per capita personal income growth.

GOALS At time of Vision 2030 launch – North Carolina per capita personal income was \$39,388.

RESULTS 2015 to 2016 per capita personal income growth of 3% is ranked 18th.

North Carolina 2014 to 2016



Source: Bureau of Economic Analysis (BEA). 2017. "Personal Income Summary"

North Carolina's income growth is among the top 20 states, meeting the 2030 goal.

Personal Income

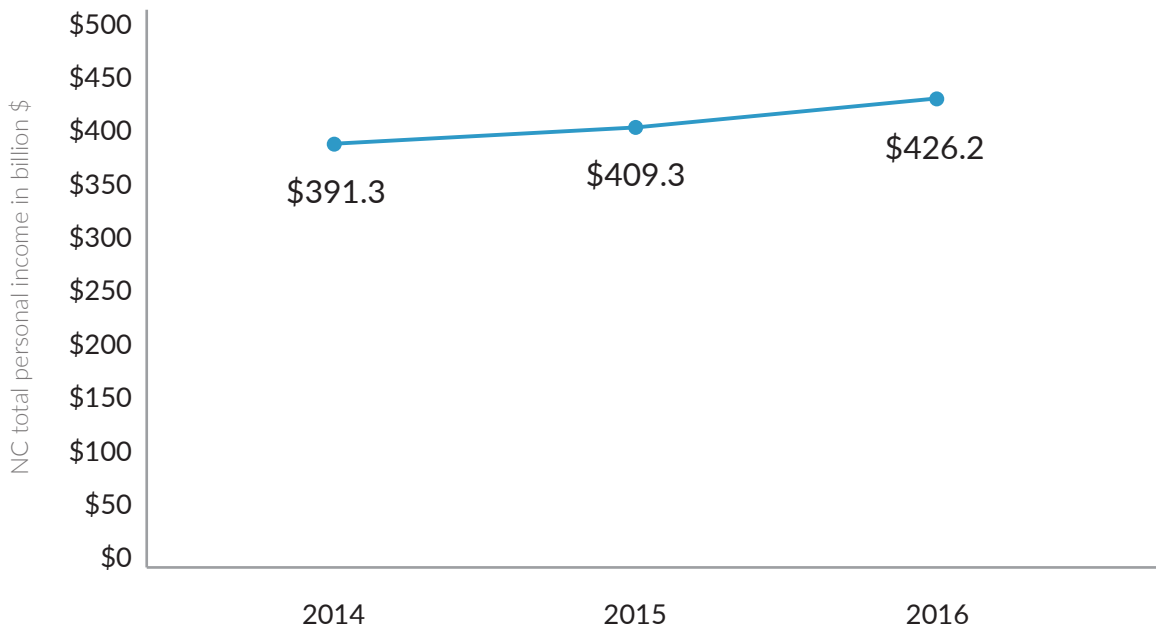


VISION 2030 – Increase the amount of personal income by more than \$5 billion annually.

GOALS At time of Vision 2030 launch – North Carolina total personal income was \$391.3 billion.

RESULTS From 2014 – 2016 total North Carolina personal income grew by \$34.9 billion to \$426.2 billion.

North Carolina 2014 to 2016



Source: Bureau of Economic Analysis (BEA). 2017. "Personal Income Summary"

North Carolina has exceeded this goal by a large margin.

Exports

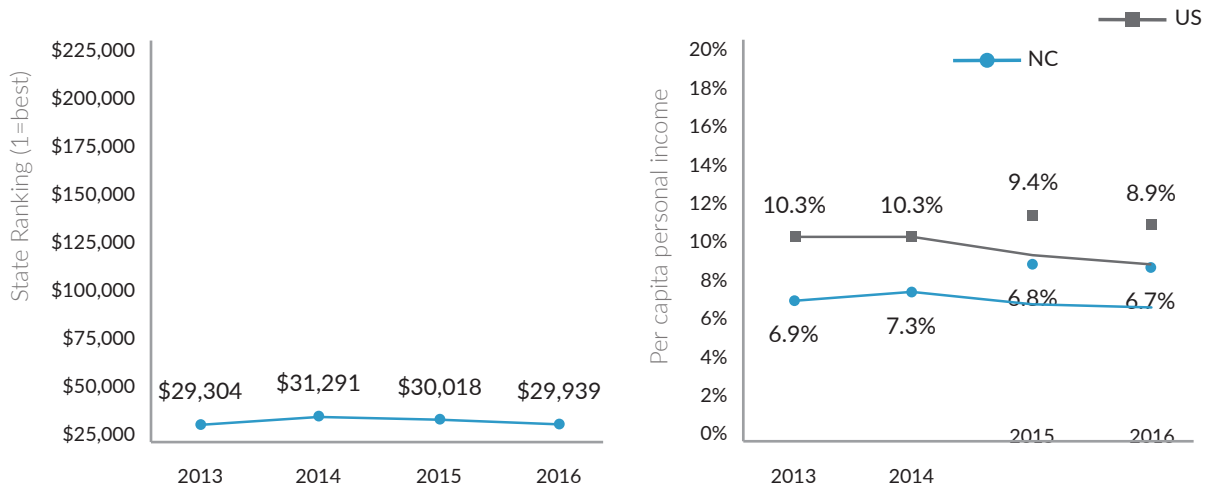


VISION 2030 – Expand state exports above the national average.

GOALS At time of Vision 2030 launch – 2013 North Carolina exports were 6.9% of GDP and US exports were 10.3% – a gap of 3.4%.

RESULTS In 2016 North Carolina exports were 6.7% of GDP and US exports were 8.9%, a gap of 2.2%.

North Carolina 2013 to 2016



Source: US Census and US Bureau of Economic Analysis

United States exports have decreased as a percentage of GDP. North Carolina's has decreased, but just slightly. The result is that the gap has been narrowed and the 2030 goal is being met. Measuring real growth in exports would be a complementary assessment better reflect the goal.

High Tech Employment

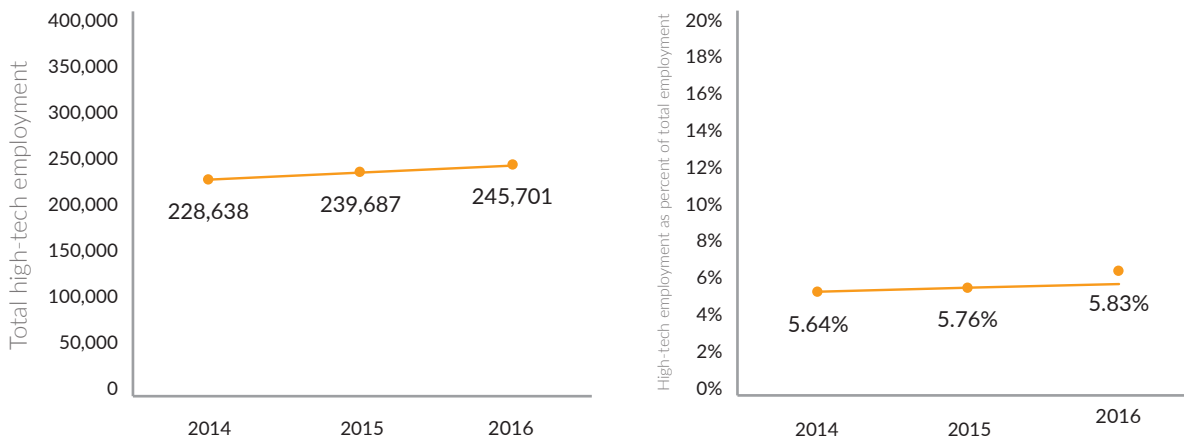


VISION 2030 – Increase the overall percentage of high-tech employment by 20%.

GOALS At time of Vision 2030 launch – 2014 North Carolina High-Tech employment was 228,698, 5.63% of total employment.
by 2020 – 6.00%
by 2025 – 6.40%
by 2030 – 6.75%

RESULTS In 2016 High-Tech employment grew to 245,701 and was 5.82% of total employment.

North Carolina 2014 to 2016



Source: North Carolina Technology Association

North Carolina technology jobs are among the fastest growing in the United States and we are well on the way to meeting the 2030 goal.

Research and Development Funding Per Worker

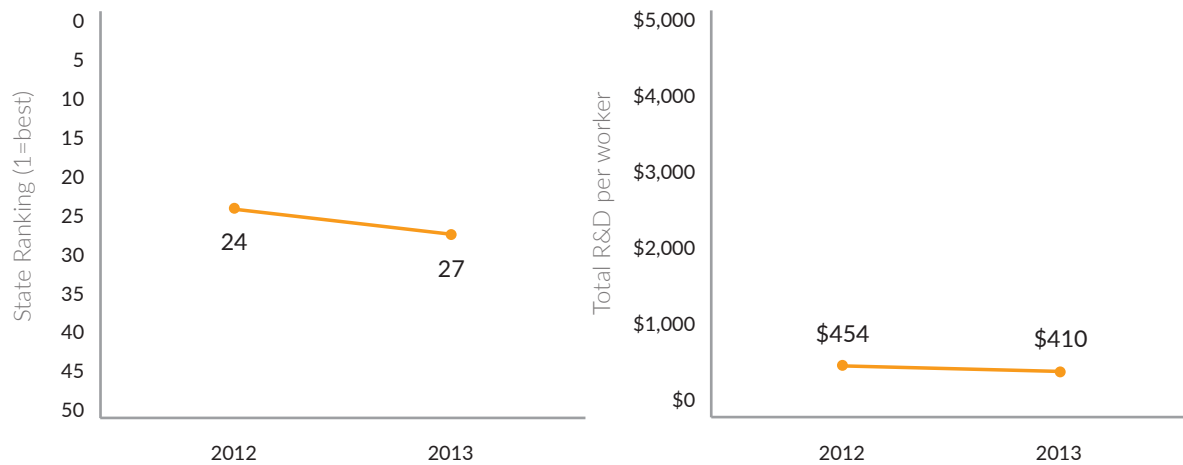


VISION 2030 - Improve state ranking for total R&D per worker to top 15 nationally.

GOALS At time of Vision 2030 launch - 2012 total R&D per worker was \$454 and was ranked 24th.
 by 2020 - 21st ranking
 by 2025 - 18th ranking
 by 2030 - 15th ranking

RESULTS 2013 total R&D per worker was \$410 and was ranked 27th. This is the latest data available.

North Carolina 2012 to 2013



Source: National Science Foundation. "Science and Engineering Indicators 2016"

Although information is dated, no progress can be shown yet.

Business-Performed Research and Development

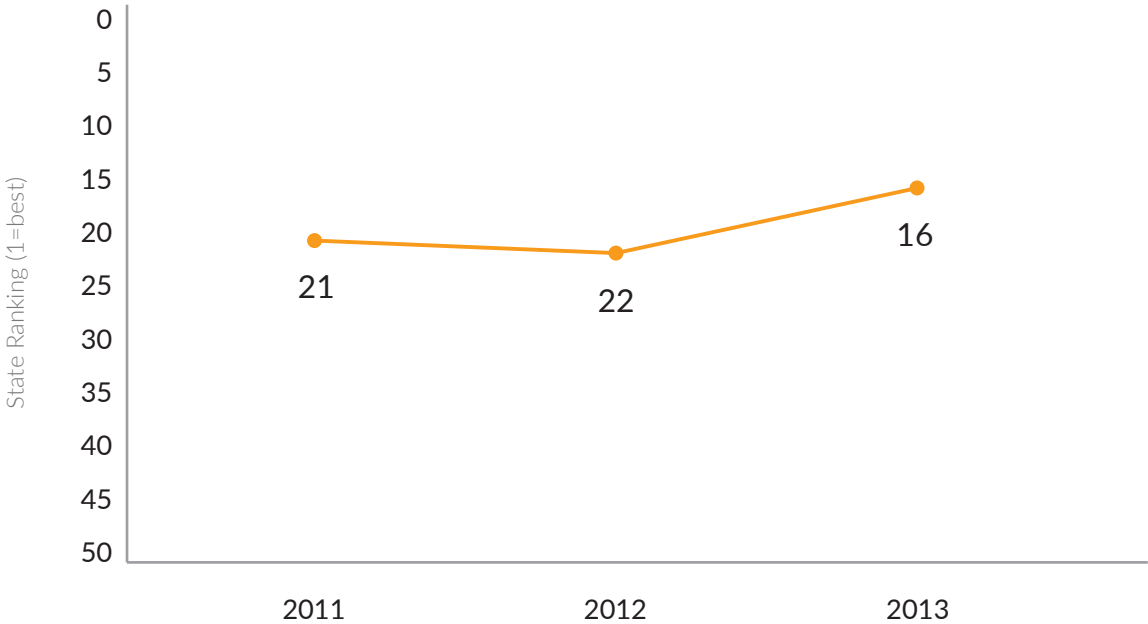


VISION 2030 – Improve to top 10 business-performed R&D as a percentage of private industry output.

- GOALS** At time of Vision 2030 launch – 2013 North Carolina ranked 16th (tied with Illinois) with 2.01%
 - by 2020 – 12th ranking
 - by 2025 – 11th ranking
 - by 2030 – 10th ranking

RESULTS 2013 is the latest data available.

North Carolina 2011 to 2013



Source: National Science Foundation, 2016. "Science & Engineering Indicators: 2016."

NSF data usually lags several years, the latest available from 2016 reflects 2013 data. By going back to 2011, we can show some progress is being made.

Technology Licenses and Options

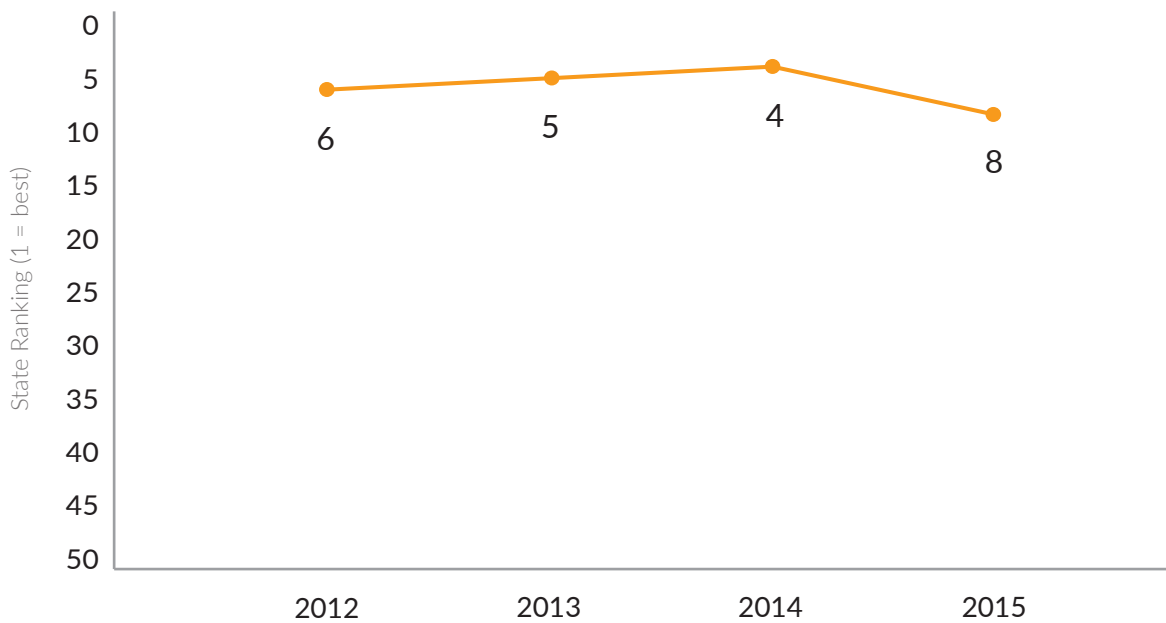


VISION 2030 – Improve to top 3 technology licenses and options executed from universities.

GOALS At time of Vision 2030 launch – 2012 North Carolina ranked 6th with 291.
 by 2020 – 5th ranking
 by 2025 – 4th ranking
 by 2030 – 3rd ranking

RESULTS 2015 North Carolina ranked 8th with 394.

North Carolina 2012 to 2015



Source: Association of University Technology Managers (AUTM). 2016. "Statistics Access for Tech Transfer (STATT) Database."

North Carolina lost a little ground, not significant, between 2012 and 2015. Our numbers have been improving, but our relative ranking has dropped slightly.

Start-Ups from Universities

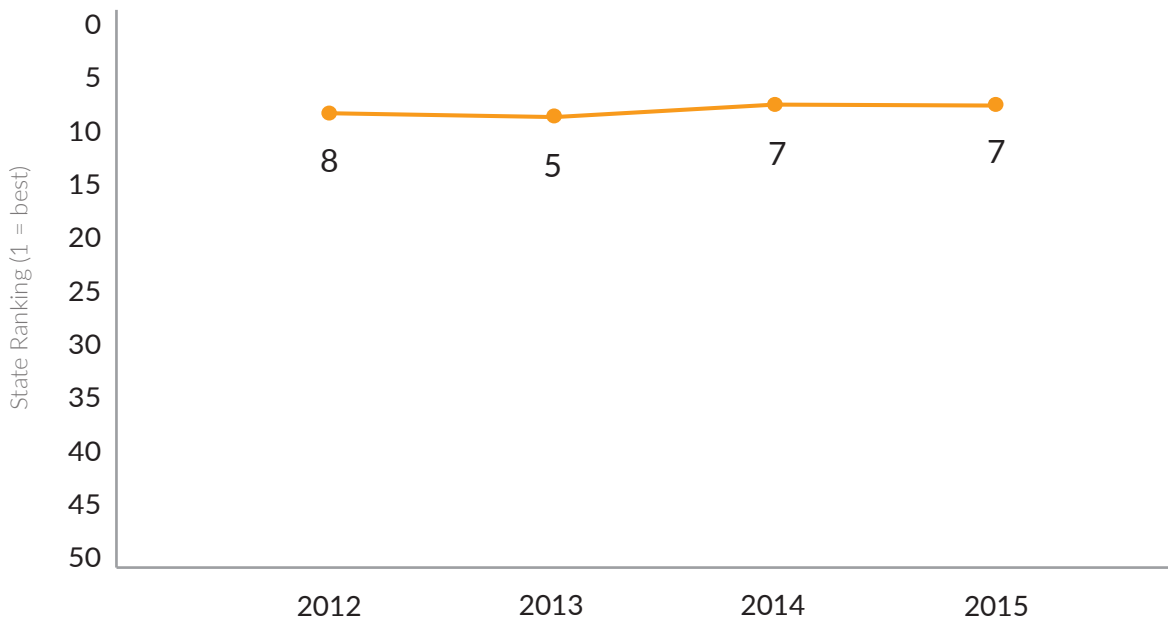


VISION 2030 – Improve to top 5 ranking start-ups from universities.

GOALS At time of Vision 2030 launch – 2012 North Carolina ranked 8th with 27.
by 2020 – 6th ranking
by 2025 – 5th ranking
by 2030 – 4th ranking

RESULTS 2015 North Carolina ranked 7th with 36.

North Carolina 2012 to 2015



Source: Association of University Technology Managers (AUTM). 2016. "Statistics Access for Tech Transfer (STATT) Database."

North Carolina continues to be a top 10 state with progress possible in the coming years.

Patents Issued

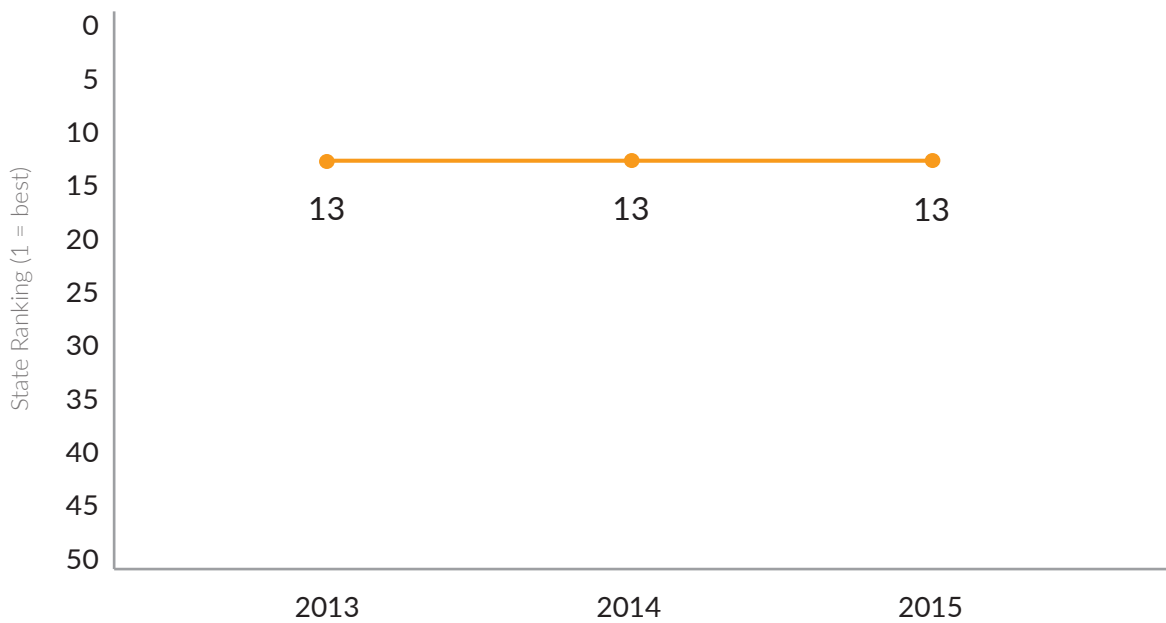


VISION 2030 – Improve to top 10 ranking in patents issued.

GOALS At time of Vision 2030 launch – 2013 North Carolina ranked 13th with 3,143 patents.
 by 2020 – 12th ranking
 by 2025 – 11th ranking
 by 2030 – 10th ranking

RESULTS 2015 – North Carolina ranked 13th with 3,354 patents.

North Carolina 2013 to 2015



Source: US Patent and Trademark Office. 2017. "Number of Patents Granted by State."

No change in rankings during the first two years, although North Carolina patents have risen during the period.

Venture Capital

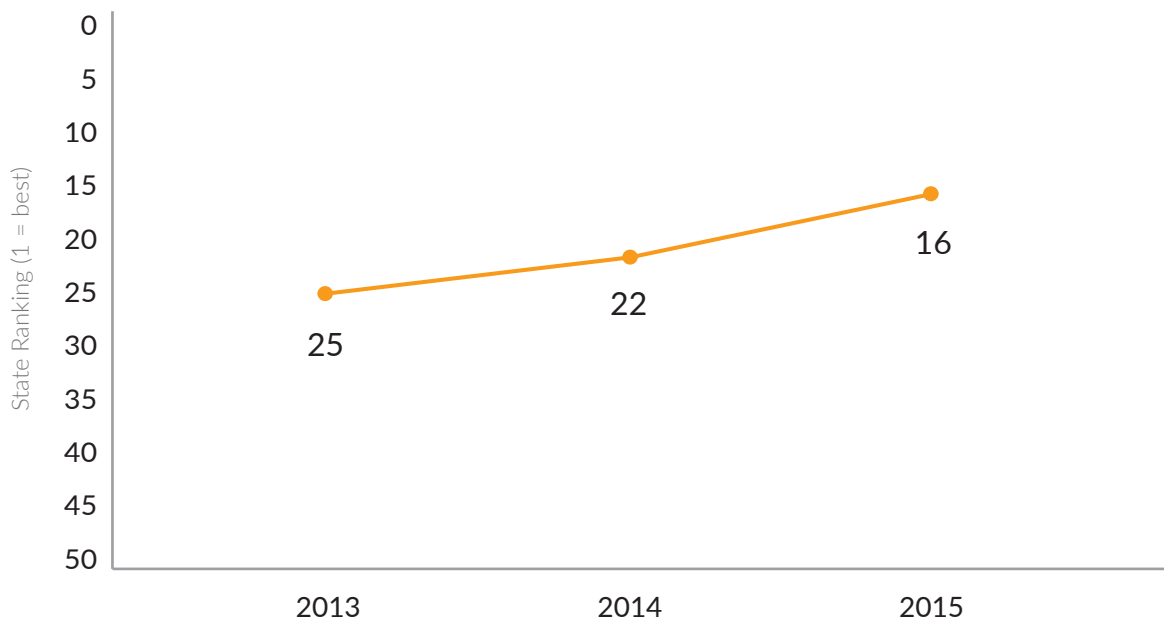


VISION 2030 – Improve to top 15 in venture capital funding per \$1 million GDP.

GOALS At time of Vision 2030 launch – 2013 North Carolina ranked 25th with \$571 of venture capital per million \$ of GDP.
by 2020 – 18th ranking
by 2025 – 16th ranking
by 2030 – 14th ranking

RESULTS 2015 – North Carolina ranked 16th with \$1,353 of venture capital per million \$ of GDP.

North Carolina 2013 to 2015



Source: National Venture Capital Association. 2016. "NVCA Yearbook 2015." Dashboard uses same date from National Science Foundation report issued every two years.

Good progress has been made toward the goal during the first few years.

Entrepreneurs Per 100,000 People

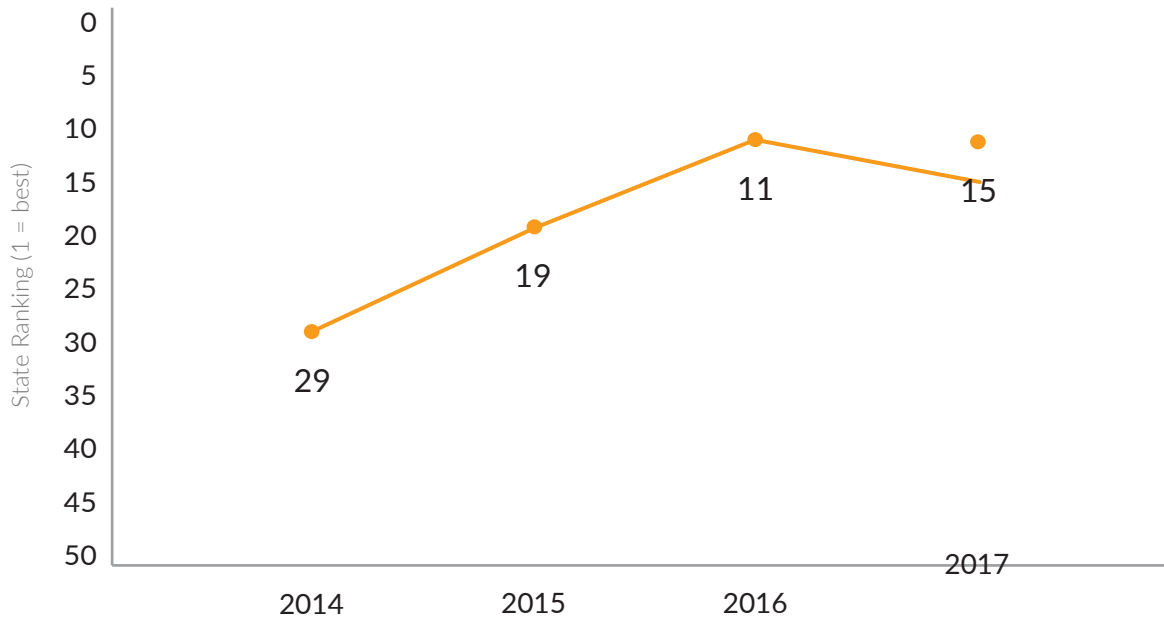


VISION 2030 – Improve to top 15 in average number of entrepreneurs per 100,000 people.

GOALS At time of Vision 2030 launch – 2014 North Carolina ranked 29th in rate of new entrepreneurs.
 by 2020 – 20th ranking
 by 2025 – 17th ranking
 by 2030 – 15th ranking

RESULTS 2017 – North Carolina ranked 15th in rate of new entrepreneurs per 100,000 people (tied with New Jersey and Oregon).

North Carolina 2014 to 2017



Source: Kauffman Foundation. "Index of Startup Activity State Trends: Rate of New Entrepreneurs"

Significant progress has been made toward this goal.

Roads



LACK OF
NEW DATA

VISION 2030 – Raise NC's road grade on the ASCE Infrastructure Report Card from a "C" to a "B".

GOALS At time of Vision 2030 launch – 2013 NC's road grade was "C"

RESULTS 2013 is the most recent report.

Source: ASCE Infrastructure Report Card

No new information exists yet. North Carolina has made generational reforms to transportation funding since 2013. A new report is expected in the next couple years.

Structurally Deficient Bridges

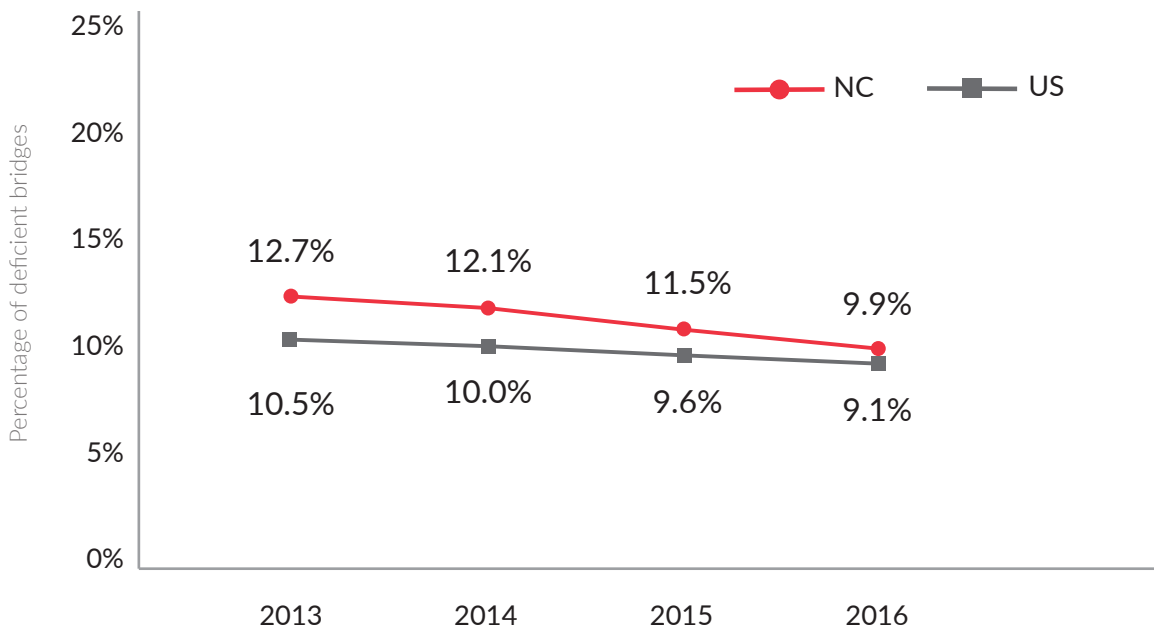


VISION 2030 – Reduce the percentage of bridges deemed structurally deficient to below the national average.

GOALS At time of Vision 2030 launch – 2013 North Carolina had 12.7% structurally deficient bridges and the US average was 10.5%, a gap of 2.2%.

RESULTS 2016 – North Carolina had 9.9% structurally deficient bridges and the US average was 9.1%, a gap of 0.8%.

North Carolina 2013 to 2016



Source: Federal Highway Administration (FHA). 2017. "Deficient Bridges by State and Highway System."

Significant progress has been made toward this goal. To allow state comparisons, FHA standardized the numbers that were used.

Commuting Time

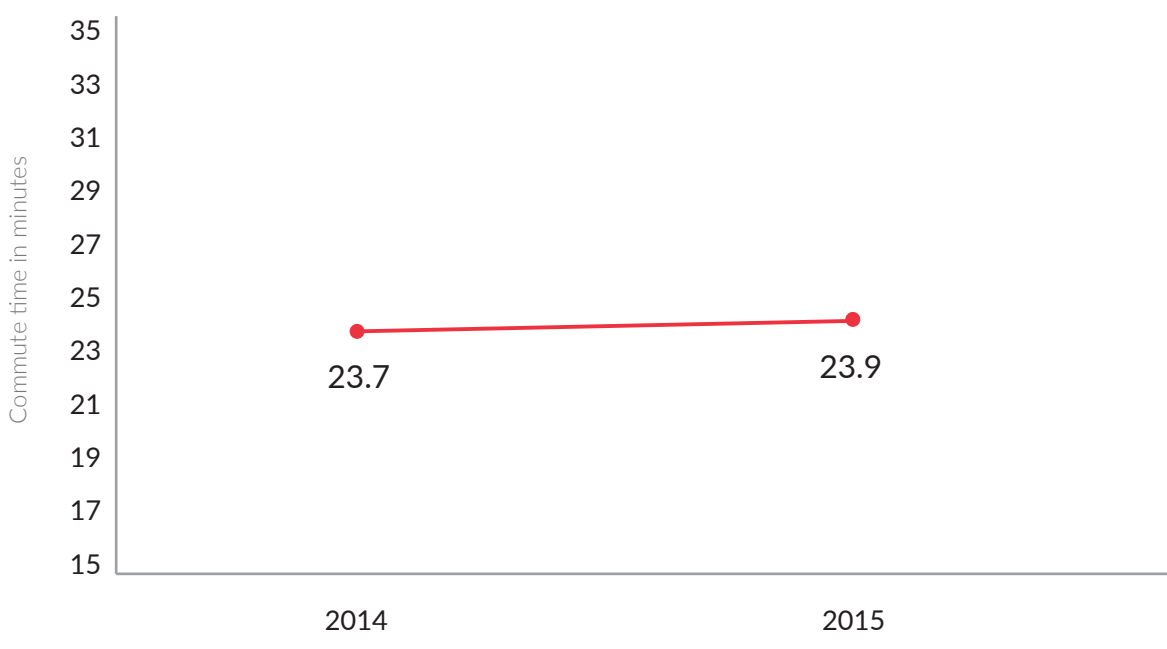


VISION 2030 – Maintain current average commute time of 23.7 minutes.

GOALS At time of Vision 2030 launch – 2014 North Carolina average commute time was 23.7 minutes.

RESULTS 2015 North Carolina average commute time was 23.9 minutes. This is the most recent available data.

North Carolina 2014 to 2015



Source: U.S. Census Bureau. 2017. Accessed through American Factfinder.

Although data is from two years ago, commute time has increased slightly. Due to the concentration of new jobs in urban counties, it is likely that commuting from rural to urban will negatively impact this goal in the coming years. This data is based on a periodic survey. More reliable data is only collected during the 10-year census.

Broadband Access

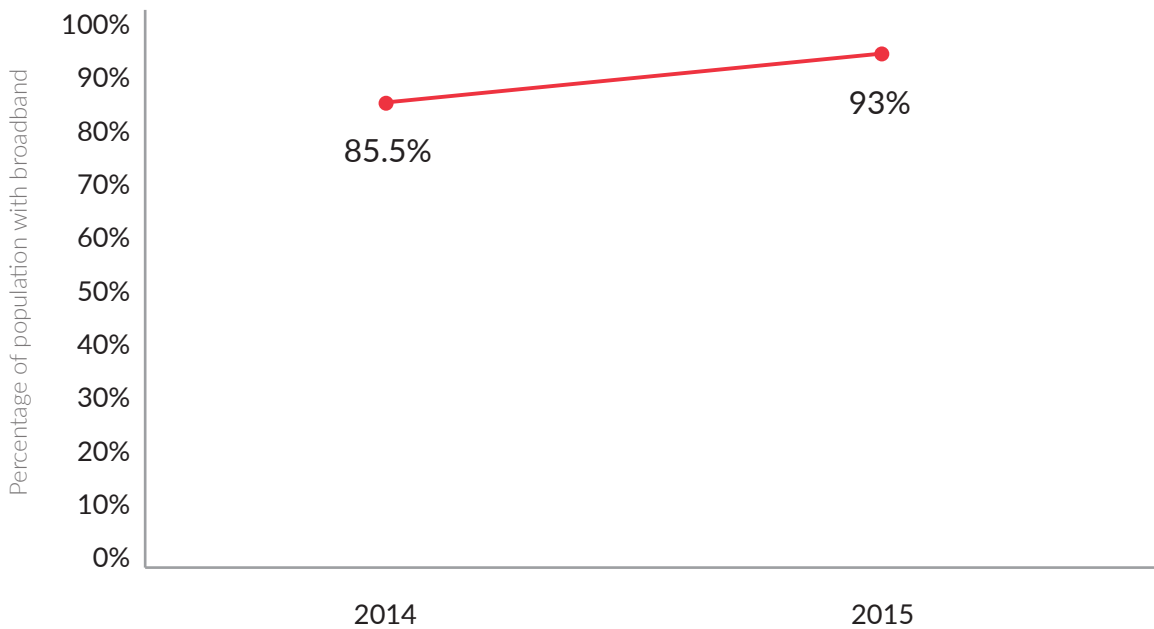


VISION 2030 – Achieve 100% broadband access.

GOALS At time of Vision 2030 launch – 2014 North Carolina had 85.5% of population with broadband access.

RESULTS 2015 – North Carolina had 93% of population with broadband access.

North Carolina 2014 to 2015



Source: Federal Communications Commission. "2016 Broadband Progress Report"

Good progress has been achieved in recent years. The policy discussions are now moving toward the speed available, the cost in more rural areas and the numbers that use available service.

Electrical Energy Costs

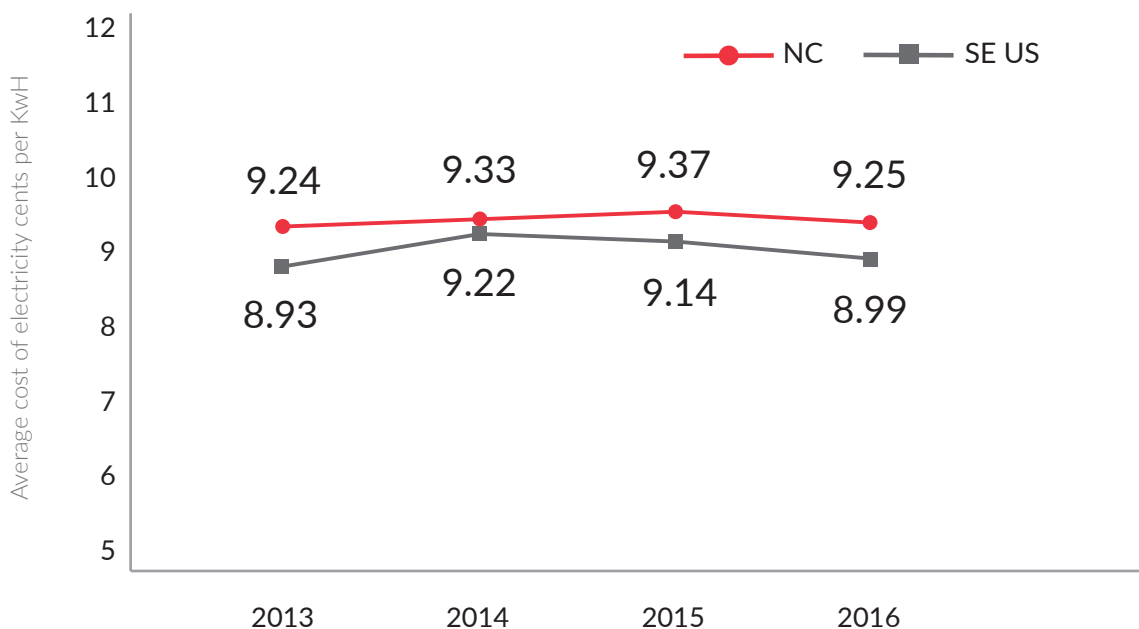


VISION 2030 – Reduce average North Carolina electrical energy costs to the average of Southeastern states.**

GOALS At time of Vision 2030 launch – 2013 North Carolina average electrical cost, all sectors, was 9.24 cents per Kwh.

RESULTS 2016 – North Carolina average electrical cost, all sectors, was 9.25 cents per Kwh. Southeastern states average electrical cost was 8.99 cents per Kwh.

North Carolina 2013 to 2016



Source: US Energy Information Administration. "Average Retail Price of Electricity"

There has been little change in the past three years. This reflects the average price, but does not reflect the difference in energy costs between types of users.

**Southeastern states are AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, LA

Airport Enplanements

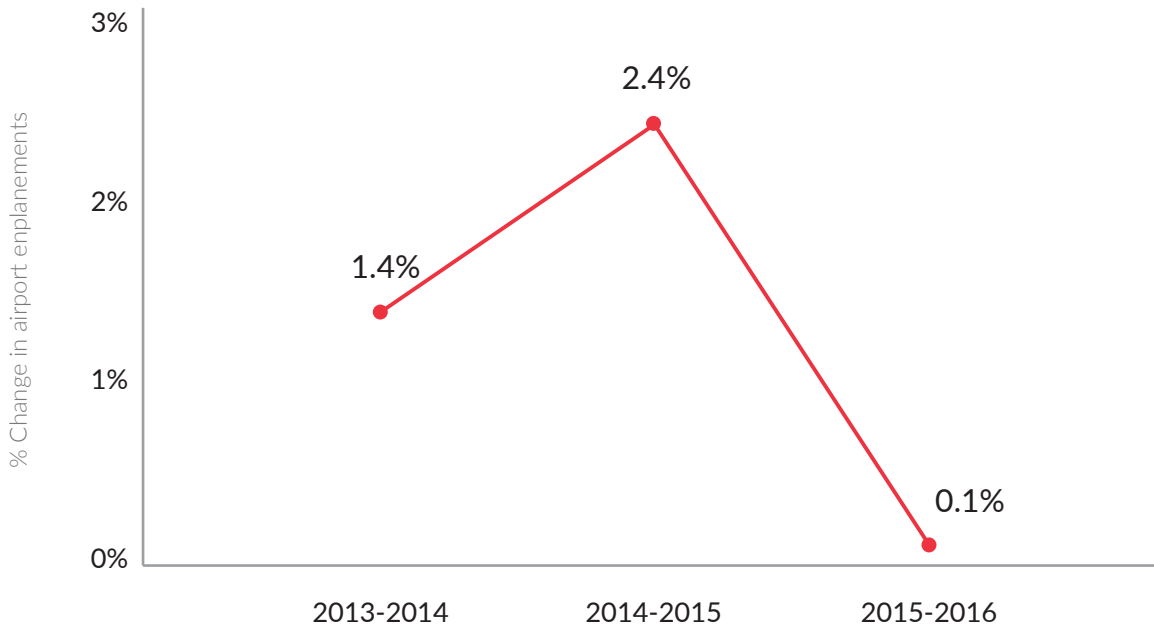


VISION 2030 – Increase airport enplanements by 3% annually.

GOALS At time of Vision 2030 launch – 2013 North Carolina annual airport enplanements were 28,028,678 at the 10 North Carolina primary commercial airports.

RESULTS 2016 – North Carolina annual airport enplanements were 29,125,810, an increase of 3.9% over three years.

North Carolina 2013 to 2016



Source: Federal Aviation Administration (FAA). 2017. "Passenger Boarding (Enplanement) at Commercial Service Airports"

Limited progress has been made since 2013. While there is growth, it has yet to reach 3% annually. Growth varies significantly between airports.

NC Ports

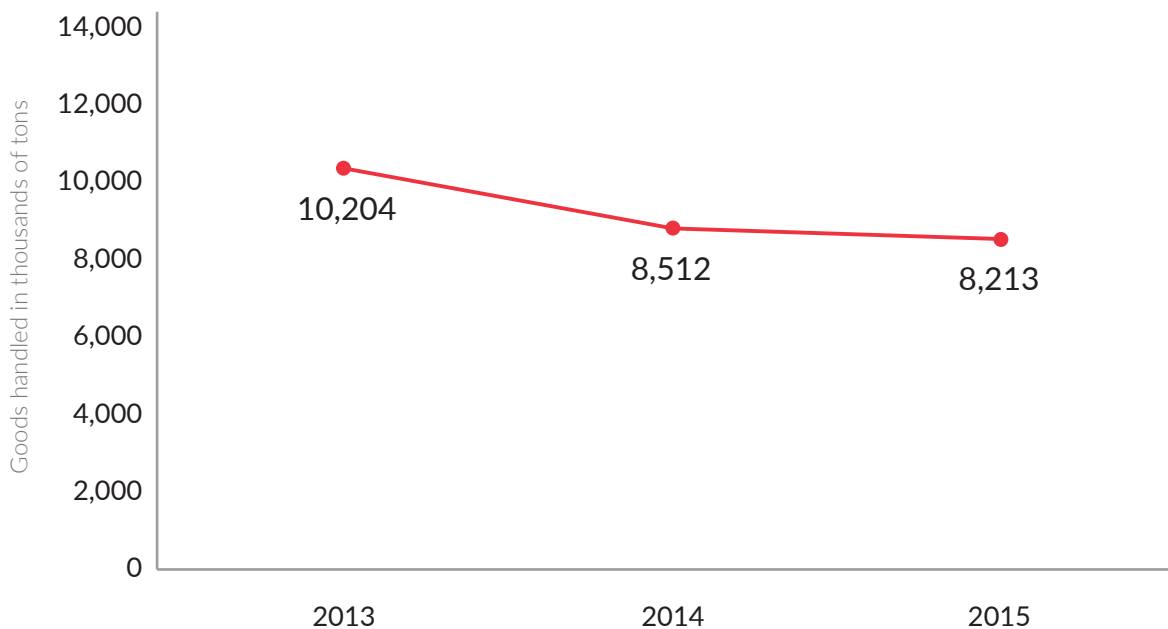


VISION 2030 – Increase the goods handled by North Carolina Ports by 4% annually.

GOALS At time of Vision 2030 launch – 2013 North Carolina ports handled 10,204,142 tons of total trade.

RESULTS 2015 – North Carolina ports handled 8,212,759 tons of total trade, a decrease of 19.5%.

North Carolina 2013 to 2015



Source: U.S. Army Corps of Engineers, Waterbone Commerce Statistics Center

Progress has not been made on this goal. Federal data was used to normalize the information available for all ports.



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