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A Competitive Realities Report for Fayetteville, Georgia

December 11, 2015
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Prepared for the City of Fayetteville

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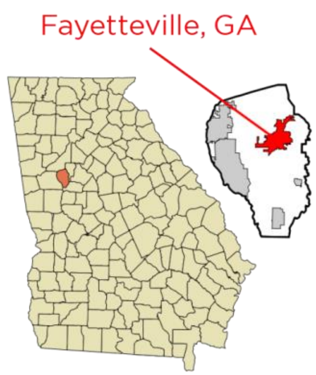
INTRODUCTION

In August 2015, the City of Fayetteville, Georgia retained the firm of Garner Economics, LLC to create an economic development strategy specific to the City that will take into account the current state of the City and provide a roadmap for Fayetteville to create economic opportunities for its citizens.



The focus of this engagement is for the City to understand the product improvement, marketing, and potential organizational changes it must make to ensure that the City strengthens its competitive position and is able to attract and retain the types of businesses that will create jobs and opportunities for its citizens.

Specifically, the scope of services for the overall project includes:

1) A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
2) An Assets and Challenges Assessment (A&C) of Fayetteville from the perspective of a site location consultant that facilitates investment decisions;
3) Recommendations for business targets suitable for the City based on our research and analysis; and finally,
4) A set of implementable recommendations that the leadership in the City can utilize to enhance the economic well-being of the area and make Fayetteville a desirable business location and enhance its quality of place.

This *Competitive Realities Report* (CRR) is the first of two reports that will be provided to the City of Fayetteville. It documents the work of the first two elements of the project scope and summarizes the findings of Phase I (see Figure 1 on page 4).

METHODOLOGY

The CRR is a compilation of local facts and data points with quantitative analysis and some subjective opinions noted in the Assets and Challenges Assessment. Together, the Assets and Challenges Assessment, Community Engagement Summary, and the Economic and Labor Analysis inform this process, upon which the strategy and its recommendations will be built.

This CRR offers no recommendations. The final strategy report will consist of the business target recommendations along with conclusions and recommendations for how the City of Fayetteville can enhance its global competitiveness. (The final report will be presented in March 2016.)

Assets and Challenges Assessment

Our approach to creating the CRR began with the consulting team conducting an Assets and Challenges Assessment of the City. This was done through a windshield tour of the area and against a pre-determined list of 51 criteria used to evaluate the area from a site-selection perspective. Garner Economics assessed the City based on the qualities, elements, and infrastructure that a business will look for when considering the City as a place for its operations.

The assessment is both an objective and subjective evaluation of the area. We applied many of the same criteria to assess

Fayetteville that we use when engaged by a corporate client in evaluating communities for possible investment. The assessment allows us to document challenges that exist in the City that constitute barriers to successful economic development. By knowing what challenges or gaps exist, the City can take the steps necessary to ameliorate the situation, strengthen its overall "product," and be a more attractive business location. Likewise, by knowing its strengths, the City can better leverage them in its efforts to attract and retain businesses.

The objectives of the Assets and Challenges Assessment are to:

- Help local leaders understand the City's potential so that they can best develop realistic goals;
- Identify key strengths to emphasize in economic development marketing efforts; and
- Identify key weaknesses that may limit investment in the City so that remediation of these local challenges may occur.

Figure 1
Project Phases

Phase I: Discovery	Phase II: Strategy	Phase III: Implementation Recommendations
Evaluate Fayetteville's competitive position from an economic development perspective: • Demographic & economic analysis • Labor market & cluster analysis • Community Assets and Challenges Assessment (A&C) • Compare Fayetteville to the benchmark communities of Woodstock, Georgia; Opelika, Alabama; the State of Georgia; and the nation • Retail analysis Publish the *Competitive Realities Report* (a summary of Phase I).	Position Fayetteville to achieve success through an actionable strategy addressing: • Business retention • Product planning and development • Entrepreneurship development • Business recruitment and marketing • Workforce needs	High-level implementation plans for actionable items, including: • Targeted business recruitment and marketing strategy • Retention efforts • Organizational recommendations for ED service delivery • Budgeting and phasing • Appropriate engagement with other economic development efforts • Workforce development recommendations • Metrics to track success Present the final report to an external audience.

Benchmarking

Because Fayetteville must compete with other geographies—including those globally—it is important to understand where the City stands compared to those key competitors. To conduct such benchmarking, Garner Economics evaluated key demographic and economic indicators for the City and compared the community to statewide and national-level data, as well as to Woodstock, Georgia and Opelika, Alabama. These benchmark geographies were selected by the City of Fayetteville.

The variables against which Fayetteville and the other benchmark cities, the nation, and the state were compared include:

- Growth trends
- Age group composition
- Race and ethnicity
- Crime rates
- Migration trends & sources of change
- Composition & sources of income
- Proprietor trends
- Wage comparison
- Retail leakage analysis
- Employment growth
- Unemployment trends
- Exports

Stakeholder Input

Finally, as a complement to the assessment of the physical and regulatory structure of Fayetteville against its benchmarked peers, Garner Economics conducted three focus groups with key community stakeholders and conducted online surveys to solicit a variety of perceptions of the City's business climate and areas for improvement.

The following chapters describe our findings within a cohesive economic assessment of Fayetteville's current state and economic potential. It sets the groundwork for developing strategies and recommendations to assist the City in providing excellent economic development service delivery within the scope of its mission.

Chapter 1: Community Engagement

Garner Economics believes that community input is a vital part of the strategic planning process. In addition to providing a context around the data accumulated in Phase I of the project, feedback from stakeholders in a community provides a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community that may or may not be discernable through desktop research.

Given this, Garner Economics undertook two community engagement streams to better understand the economic development issues facing the City of Fayetteville:

- **Focus Groups**

  Three focus groups were held on November 4, 2015, and included representatives from employers within the City, educators, real estate developers, and others engaged in efforts to improve the City's business climate. The City identified and invited participants for the groups.

  The focus groups solicited stakeholders' perceptions and opinions of the business climate of the City and its economic development efforts. Additionally, questions gauged the stakeholders' thoughts on the area's attractiveness to companies and the types of companies that would be a good fit for the region.

  A total of 52 people participated in the three groups. A list of focus group participants is included in Appendix A. Summaries of the groups' responses to questions posed in each session are included in Appendix B.

- **Electronic Surveys**

  Based on feedback received from the focus groups, Garner Economics developed and launched a community survey to solicit feedback from a broader group of Fayetteville's stakeholders. The survey was open November 16–December 4, 2015, and 182 people completed the survey. Twenty-three percent of the main survey respondents live and work in Fayetteville.*

	% of Survey Respondents
Live in Fayetteville	79
Work in Fayetteville	66
Live and Work in Fayetteville	52

  Additionally, a shorter version of the survey was distributed to a group of high school students to gauge their perspective on the future of Fayetteville.

  The most frequently provided responses to questions asked during the focus group were used as the response options for the survey. Survey respondents were also given an open-ended section to provide "other" responses. A more detailed profile of the respondents participating in the community survey and responses provided are included in Appendix C.

* For the purposes of the above live/work tally, Fayetteville was defined as those living and/or working in ZIP code 30214 or 30215. Survey results are reported for all respondents regardless of ZIP code of residence or employment.

Key Themes

Feedback from both streams was relatively consistent on broad, overarching issues facing Fayetteville. However, as would be expected given the higher degree of interaction with the economic development organizations and the impact that such service delivery has on their work or livelihood, participants in the focus groups tended to have more detailed perceptions of the economic development process in the City.

Nevertheless, all groups held similar perceptions of issues that inhibit the City's growth, the strengths of the City, and Fayetteville's potential.

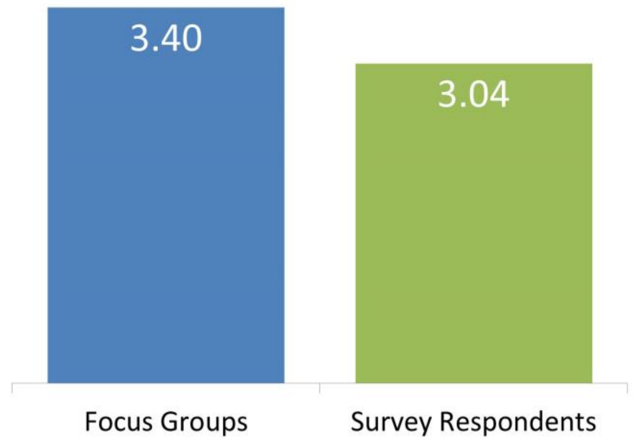
Among the groups, the overarching key themes that emerged include:

- **Continuing tensions between encouraging growth in Fayetteville and maintaining the status quo**

  As noted in Figure 2, both groups rated the City's business climate as slightly above average (a score of 3 is average). Focus groups referenced the City's reputation of being "anti-growth" in the past, but noted recent improvement and proactive efforts by the City to attract and retain business (though they also noted that much more can be done and that the City should continue these efforts). Some participants noted that, with a few exceptions (e.g., the sign ordinance), the policies and regulations in place are not impediments to growth. However, they note that there are still some in the City leadership who are satisfied with the status quo (i.e., Fayetteville remaining a bedroom community). The majority of the focus group participants would like the City to be more proactive in attracting companies and building a community where people both live and work.

Figure 2: Community views of Fayetteville's Business Climate

Focus group participants were asked to provide a number from 1-5, with 5 being the highest, to rank the business climate of the City of Fayetteville.* Survey respondents were asked to rank the business climate of Fayetteville on a scale of 1-5—from very weak to very strong—with 5 being very strong.



Similarly, survey respondents echoed this polarization and noted perceptions that Fayetteville is anti-growth or that resistance to change is inhibiting companies from locating in and—in some cases—remaining in Fayetteville.

While there were several vocal opinions on the need to restrain growth, the majority of respondents see the need to continue to grow the City and to do so in a way that leverages current assets and better distinguishes Fayetteville from other jurisdictions in the Atlanta metropolitan area.

[*] Business climate is defined by those policies and laws enacted by the local government that impact local businesses.

- **Need to improve access to and through the City**

All of the focus groups and a large number of survey respondents noted the City's quality of place and its potential to strengthen its competitiveness as a place for businesses. However, they noted that it is difficult to get to Fayetteville and even more difficult to get around Fayetteville. Survey respondents echoed this concern and ranked improving the internal road network and transportation as a high concern.

Related to the discussion on access, participants and respondents noted the lack of parking (especially in downtown) as a potential impediment to future growth. Several noted the need to think beyond the City square when considering how to make downtown more of an attraction and more walkable. They also noted that the City should look at better traffic flow on streets of regional significance (i.e., those that regional commuters use, transiting through Fayetteville on the way to their home or work in other jurisdictions).

"You have to make a mistake to come here."

—Focus Group Participant

- **Lack of amenities for younger professionals and visitors**

The focus groups and survey respondents noted the need to attract more corporate employers and businesses that would provide residents of Fayetteville employment alternatives. Both recognized, however, that Fayetteville is at a disadvantage to other areas in the Atlanta metropolitan region as it has few amenities to attract young professionals. Focus group participants also recognized the need to create locations to draw people to Fayetteville from around the region—be it downtown, creating mixed-use complexes, or upgrading retail alternatives.

Of the 20 students responding to the student survey, only four plan to return to Fayetteville after they finish their degree. Those indicating that they have no intention of relocating to Fayetteville after college or an advanced degree cited the lack of job opportunities and things to do.

"Fayetteville is attractive to seniors living in close proximity to the hospital, but not young families that want easier access to the interstate and amenities."

—Survey Respondent

"Arts, cultural areas, hip bars and dining options, and edgy retail shopping would attract more 30-somethings to live here."

—Survey Respondent

- **Opportunity to leverage the energy of Pinewood Atlanta Studios**

More so than the survey respondents, focus group participants noted the tremendous opportunities created by the location of Pinewood Atlanta Studios (Pinewood Studios) in the City. Participants were excited about the tie to the Georgia Film Academy and suggested that more be done to leverage the Studios to attract other companies and talent to the City.

- **A desire for regionalism—on the County level**

Recognizing the relatively small land mass of the City and the concentration of companies and residents in neighboring Peachtree City, focus group participants in particular called on the City's leadership to look at ways to better work with Fayette County and identify ways the City can benefit from, and balance its proximity to, Peachtree City.

Both the focus groups and survey respondents recognize that the County is in a better position to attract companies and improve the overall business climate if it is branded as a collection of aligned and collaborative municipalities.

"There is ambiguity over what is Fayetteville versus Fayette County. We need one big group working together to improve the entire County—or else we compete against each other."

—Survey Respondent

- **Recruit companies to Fayetteville, so residents have opportunities closer to home and the City's tax base is increased**

The majority of focus groups and a large number of survey respondents noted the need to increase the tax base in the City and provide closer employment opportunities for its residents.

Respondents and participants recognize the untapped potential of the City and provide suggestions on how to balance growth while maintaining Fayetteville's small-town character.

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More detailed summaries of the focus group discussions and the survey responses are included in Appendices B and C, respectively. Figures 3–7 highlight the feedback in terms of the overall competitive position of the City.

"Fayetteville needs to improve our schools – especially compared to the high schools in Peachtree City. People only want to live in certain school districts; they avoid ones they think are under-performing."

— Focus group participant

FIGURE 3: PRIORITIES TO STRENGTHEN FAYETTEVILLE'S COMPETITIVE POSITION AS A PLACE FOR BUSINESSES AND TALENT

When asked to indicate the top items they would like to see the City leadership take on to strengthen Fayetteville's ability to attract and retain quality companies and talent to the City—without worrying about money or politics—the two groups responded as follows:

Most frequently noted by focus groups:

- Improve access to highways and strengthen the road system within Fayetteville
- Create a cultural arts district or performing arts center
- Develop an area within the City that is a destination for residents and attracts visitors
- Ensure that the school system is ready to address the diversity that the County is experiencing
- Communicate the many assets Fayetteville has to offer

Most frequently noted by survey respondents:

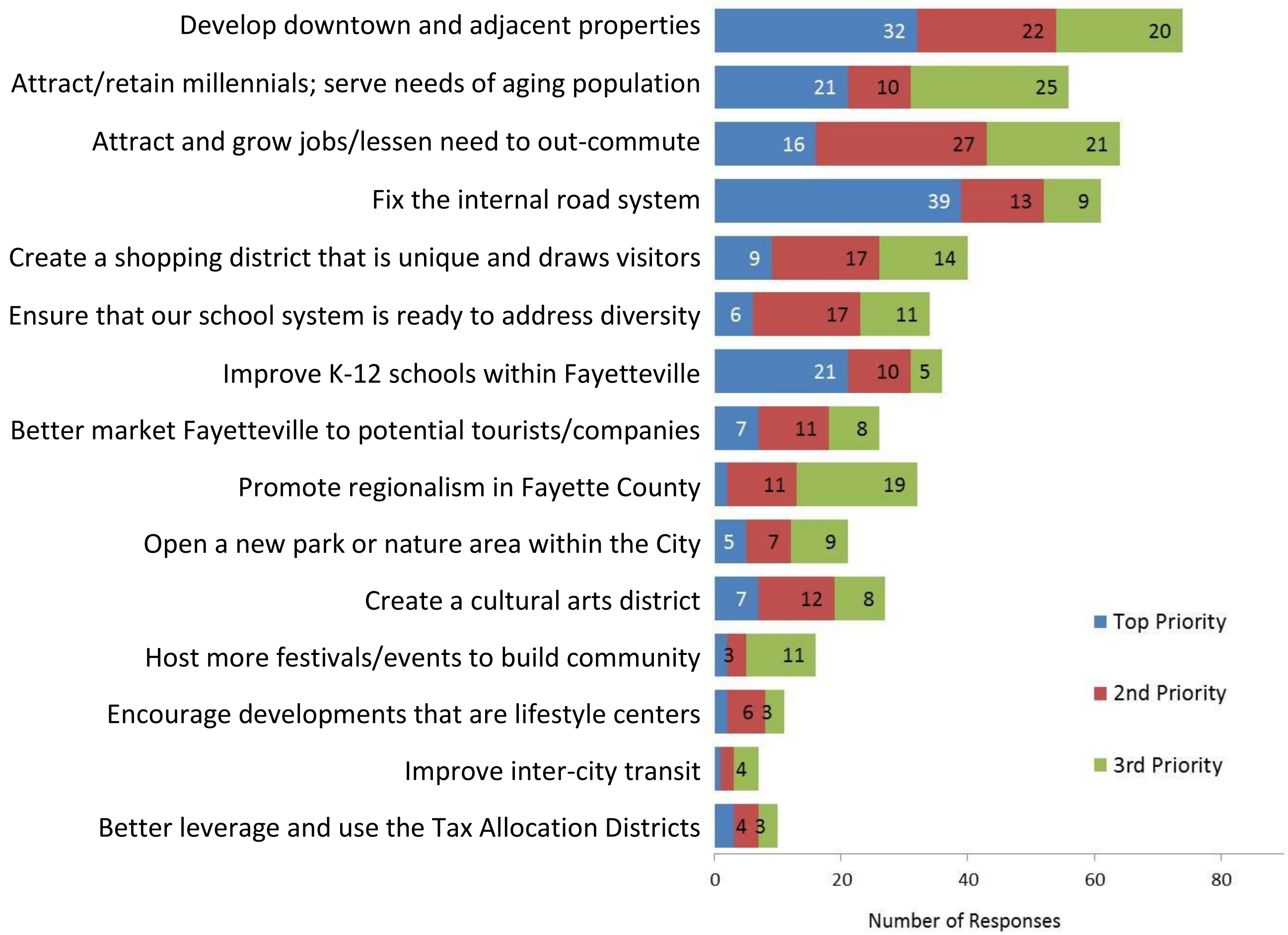
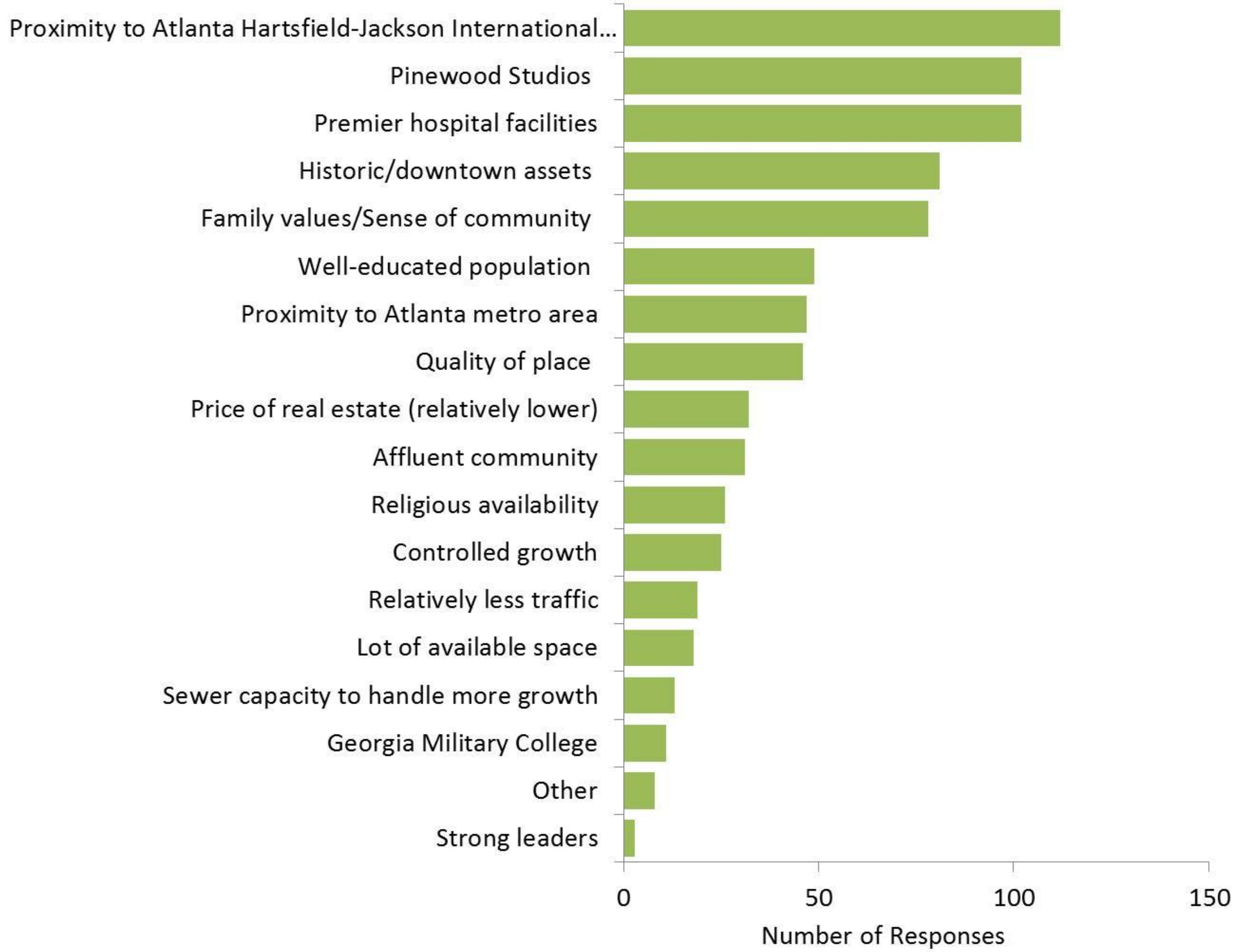


FIGURE 4: PERCEIVED STRENGTHS

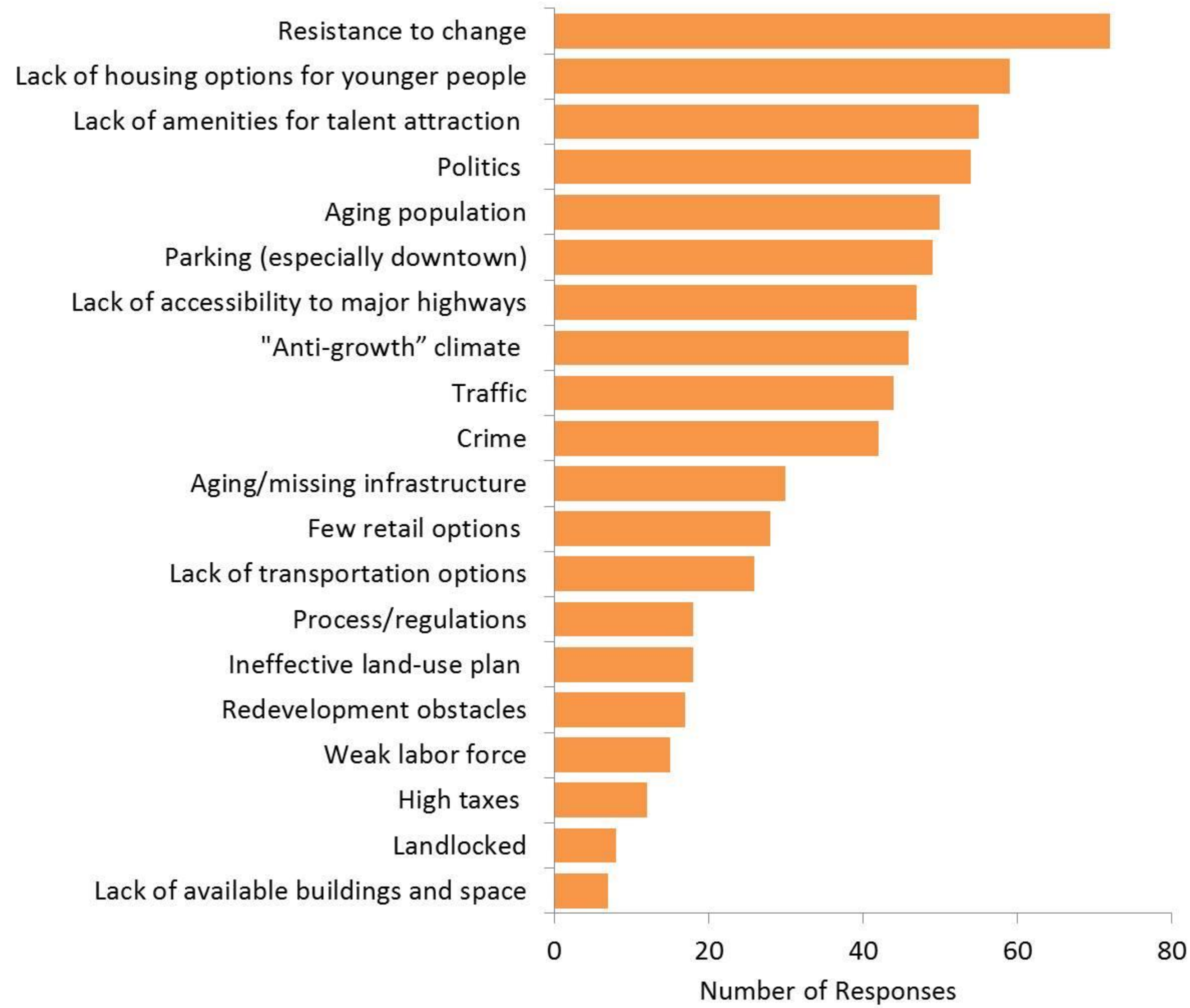
When asked to indicate Fayetteville's strengths, the two groups responded as follows:*



*Survey respondents were asked to choose up to five of the possible options.

FIGURE 5: PERCEIVED INHIBITORS

When asked to indicate issues that inhibit Fayetteville from recruiting businesses, the two groups responded as follows:*



*Survey respondents were asked to choose up to five of the possible options.

Figure 6: Potential Industries

When asked what types of companies would be a good fit for the area, the two groups responded as follows:

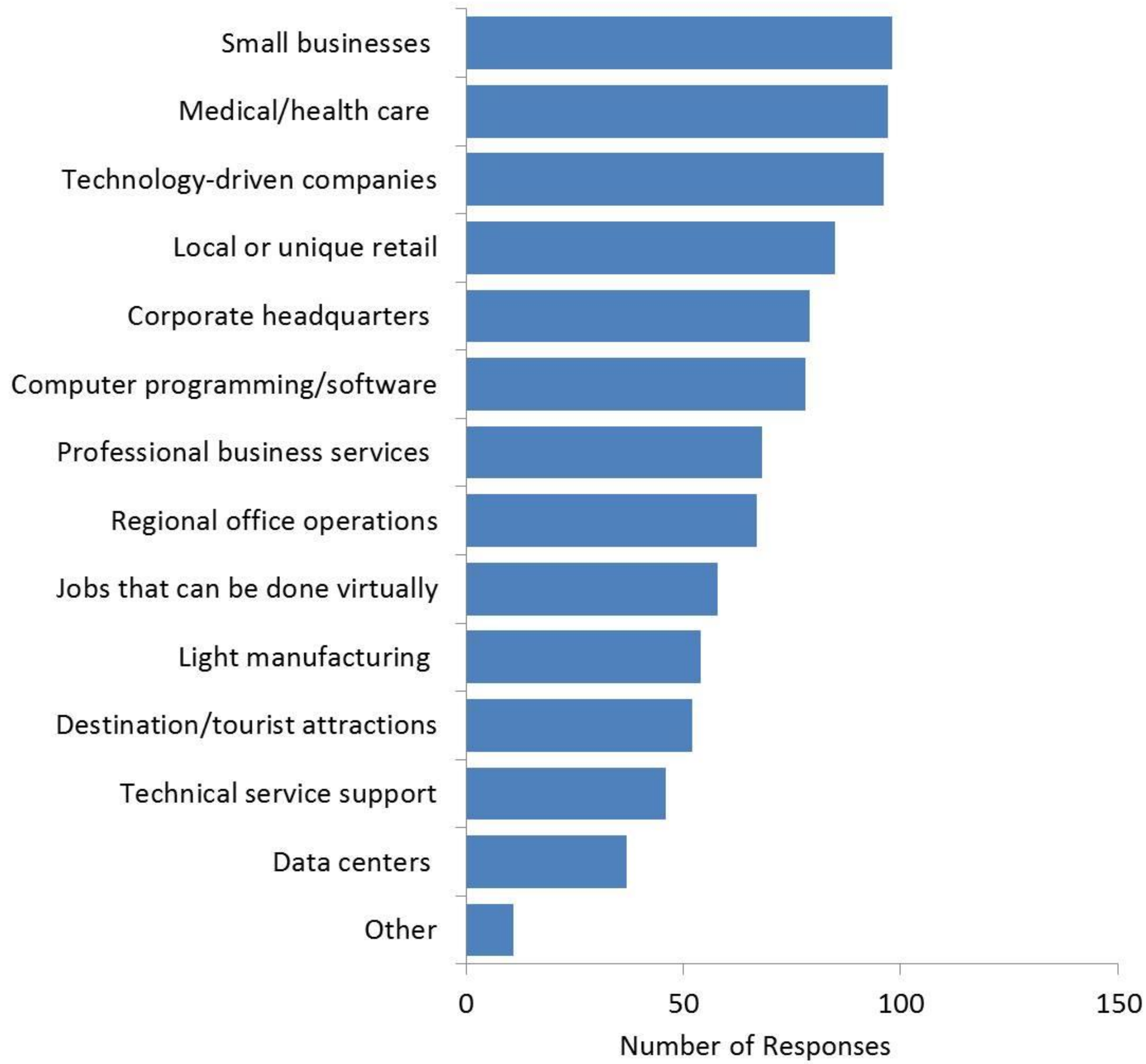
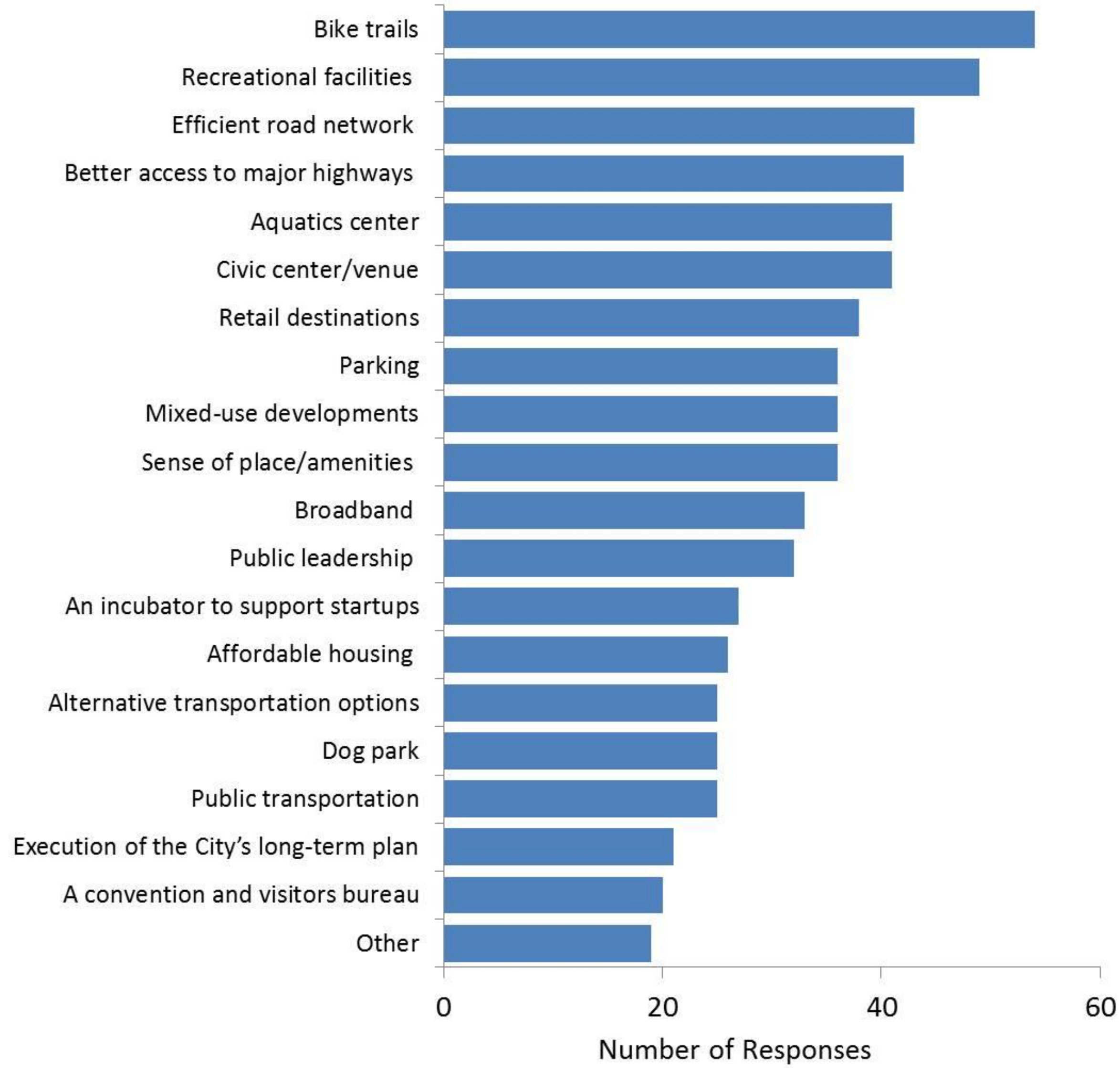


FIGURE 7: LACKING INFRASTRUCTURE

When asked what hard or soft infrastructure* is weak or missing in Fayetteville, the survey respondents ranked the items as follows below. Focus group participants most frequently noted the need for a more efficient road network and parking.



*Hard infrastructure was defined as the physical networks such as roadways, sewer, broadband Internet, airports and/or ports. Soft infrastructure was defined as institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.

Note: Survey respondents were asked to choose up to five of the possible options.

Chapter 2: Assets and Challenges Assessment

The City of Fayetteville offers a unique mix of assets for businesses that are contemplating relocation, expansion, or a startup. Our approach in conducting the Assets and Challenges Assessment (A&C) is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding its assets and challenges from a location strategy perspective, we believe that the City will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding strengths and opportunities, the City will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area's assets.

Garner Economics analyzed 51 community factors as part of the assessment. Ratings were identified by evaluating the City's position for each of the factors against the State of Georgia, the United States, and in many instances, the benchmarked cities of Woodstock, Georgia and Opelika, Alabama.

We define a Neutral rating as normal in the realm of economic development opportunity and competitiveness. An Asset rating indicates a positive feature of the City that would be evaluated and rated as a competitive strength versus the benchmark locations.

A Challenge rating identifies a factor that is considered a relative deficiency compared to other locations (or from the perspective of the consultants), which should be addressed with future remediation and may be an impediment to economic development if not resolved over time.

Of the 51 variables analyzed, 17 are considered an Asset and 20 a Challenge (13 rated as Neutral). With 20 challenge rankings, Fayetteville has too many in the negative column based on the ratio of an economically healthy, dynamic city. The goal in the future will be for those policymakers engaged in local economic development to move the bar with the neutral rankings from neutral to an asset, and the challenge ranking to neutral (or better).

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. Readers are encouraged to review the supporting data to gain a more complete understanding of those areas of interest in the full report.

REPORT DASHBOARD

Indicates the City is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.

Indicates the City is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.

Indicates the City is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

Access to Markets

Fayetteville's geographic location makes it an ideal community for domestic and international business accessibility. The City is within 400 miles of over 57 million people. Atlanta Hartsfield-Jackson International Airport is less than 18 miles away. Fayette County's Atlanta Regional Airport–Falcon Field is close by in Peachtree City. According to the National Telecommunications and Information Administration, households in Fayetteville have the greatest access to DSL compared to the benchmark cities, the County, state, and nation—with 98.5% of households having access. Challenges include no direct interstate access, inland port facilities, or rail service.

ACCESS TO MARKETS	RATING
Centrally located for major regional market	⬆ [1]
Centrally located for national market	⬆ [2]
Well positioned to serve international markets	⬆ [3]
Interstate highways	⬇
Rail service	⬇
Port facilities (inland and/or water)	⬇
Within 1 hour of commercial air passenger service	⬆ [4]
General aviation airport capable of handling corporate aircraft	⊖ [5]
Broadband availability and speeds	⬆ [6]

Labor

Of the eight variables being measured on Labor, five are considered a challenge. The lack of skilled industrial and clerical workers, technicians, and scientists makes it challenging for employers to find the workforce they need (focus group responses on November 5). The closest post-secondary vocational school is in Griffin, Georgia. Availability of management personnel is considered an asset, as is the presence of a new branch campus of Georgia Military College in Fayetteville.

LABOR	RATING
Availability of skilled industrial workers	↓ 7
Availability of skilled clerical workers	↓ 8
Availability of technicians and scientists	↓ 9
Availability of managerial personnel	↑ 10
Cost of labor	⊖ 11
Availability of post-secondary vocational training	↓ 12
Within 1/2 hour of university/college	↑ 13
Availability of engineering program (local)	↓ 14

City Economic Development Program

The City does not have a true economic development department in the traditional sense. Rather, it has a community development department that serves as the ad hoc economic development entity for the City, including managing and administering Planning and Zoning, the City's Main Street Program, and operating The Southern Ground Amphitheater. They provide staff support to the City of Fayetteville Downtown Development Authority and the Fayetteville Main Street Tourism Association. With 2.5 FTEs, they perform admirably. However, the City wishes to enhance its economic development efforts and, as such, they will need to grow their economic development initiative and staffing. The City's community development budget (economic development) is $275k, which is significantly below Opelika and the average benchmark in the southeast of $500k for a community the size of Fayetteville.

City Economic Development Program	Rating
Adequate level of professional staff	[15]
Involvement of both public and private sectors	
Local economic development organization has a strategic plan	
Level of leadership support of economic development program	
Level of cooperation between various organizations involved in economic development activity	
Level of awareness of community regarding economic development	
Level of funding for the City's economic development program	[16]

Access to Space

The City has virtually no excess space for industrial use. There is currently a 3 percent vacancy rate. Conversely, office and retail space is an asset with a 13.23 percent vacancy rate for office and a 9.91 percent vacancy rate for retail. However, as the City works to attract more office and boutique retail, more Class A space will be needed.

Access to Space	Rating
Availability of fully served and attractive industrial sites and space	17
Availability of fully served and attractive office sites and space	18
Availability of fully served and attractive retail space	19

Access to Capital

Most of the jobs created in today's national economy are through entrepreneurs. Those communities that have innovative and creative programs that support and nurture entrepreneurs are those communities that have a sustainable and healthy economy. Fayetteville has no formalized venture or early stage capital program to assist entrepreneurial development. Low-interest loans for small businesses are typically provided by local banks and state programs and the Georgia Cities Foundation Revolving Loan Fund.

Access to Capital	Rating
Availability of tax-exempt financing for new industrial facilities	20
Availability of low-interest loans for small business	21
Availability of venture capital from local sources for business startups or early stage funding	22

Government Impact on Business

The availability and capacity of wastewater treatment (wastewater demand is 2.124 MGD and capacity is 5.0 MGD), the availability of labor training incentives (Georgia's Quick Start), and the level of City property taxes compared to its benchmarks are all an asset. Challenges include the current availability of water demand and capacity and SAT scores for Fayette County High School compared to its benchmarks.

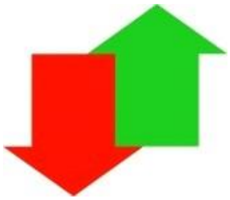
Government Impact on Business	Rating
Availability/capacity of water	[23]
Availability/capacity of wastewater treatment	[24]
Condition and maintenance of local streets	
Availability and type of local incentives	[25]
Availability of labor training incentives	[26]
SAT scores related to the benchmarked jurisdictions	[27]
Business permitting procedures and costs	
Local property taxes (City of Fayetteville)	[28]

Quality of Place

A city's quality of place is what differentiates a community. Fayetteville has a number of unique assets to help in that differentiation. Availability of executive-level housing, cost of living, level of cultural activity, diversity of shopping options, and quality health care are all assets. Challenges include the variety of local eating establishments, availability of AAA-rated properties with three diamonds or more, availability of recreational facilities, and the availability of apartments—which are all seen as challenges. Level of crime, the availability of moderate-cost housing, the appearance of the community as a whole, and the Central Business District (CBD) are all considered neutral.

QUALITY OF PLACE	RATING
Availability of executive-level housing	↑ [29]
Availability of moderate-cost housing	▭ [30]
Availability of apartments	↓ [31]
Cost-of-living index	↑ [32]
Level of crime	▭ [33]
Level of cultural activity	↑ [34]
Availability of recreational opportunities	↓ [35]
General appearance of the community	▭
Availability of major shopping facilities	↑ [36]
Availability of adequate medical facilities	↑ [37]
Availability of first-class hotels, motels, and resorts	↓ [38]
Quality and variety of local restaurants	↓
Appearance of the Central Business District	▭

Chapter 3: Dashboard Indicators Summary and Data Methodology



The following analysis examines the economic position and competitiveness of the City of Fayetteville, Georgia. For context, this report compares the City to itself over time, the nation, the State of Georgia, and two benchmark cities: Woodstock, Georgia and Opelika, Alabama. *Where city-level data is unavailable, either zip code or county-level information is used. In particular, retail leakage, wage and employment data (pages 61-78) use the zip codes of 30214 and 30215.*

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. In all cases, the original and most current available data as of October 2015 is used. Garner Economics conducted all unique calculations and computations from the original data. Additional information and methodology is included in the Appendices of this report.

Demographic & Labor Dynamics	
	Over the last decade, the total population of Fayetteville has increased 16.1% or 2,698 residents; the rate is above the nation, the state, Fayette County, and Opelika, but below the benchmark city of Woodstock.
	Over the last five years, the annual rate of population growth in Fayetteville has been 1.5%, while over 10 years, the rate averaged 2.2%. Fayetteville's 5- and 10-year annual pace of population growth is above Opelika, Fayette County, the state, and the nation.
	Over the 2009 to 2013 period, Fayetteville attracted 36.5% of its new residents from a *Different County in Same State*, a higher proportion than was experienced in both benchmark communities, the state, and the nation. Fayetteville attracted the lowest relative proportion of new residents from a *Different State*. The City also attracted the second highest percentage from *Abroad*.
	Among all of the study areas, Fayetteville has the second most racially diverse population.
	At 41.2 years, the median age in Fayetteville is higher than both benchmark cities, the state, and the nation, but slightly lower than the County median.
	Fayetteville's highest proportion of residents is in two age groups: 35–44 and 45–54. Fayetteville has a lower share of residents in age groups 25–34 than both benchmark cities.
	Fayetteville's violent and property crime rates were below Opelika, the state, and the nation, but above Woodstock and the County.

	Demographic & Labor Dynamics (continued)
	Educational attainment among the majority of Fayetteville's population ages 25+ holds at least a high school diploma, with 42% holding a *Bachelor's Degree* or *Graduate or Professional Degree*. With the exception of Woodstock, Fayetteville has the lowest proportion of residents whose highest level of educational attainment is *Less than 9th Grade*.
	At 1379, Fayetteville's 2015 composite SAT total score for Fayette County High School is below all of the study areas.
	Fayette County High School and the entire district rank above all other benchmark except Opelika in high school graduations rates.
	Among Fayetteville's new residents ages 25 and over, 42.3% hold a *Bachelor's Degree* or higher. This is greater than Opelika, the state, and the nation, and only slightly lower than Woodstock and the entire County.
	Among Fayetteville residents ages 25 and over, median earnings are on par with the state and nation for all categories of educational attainment, however, lower than Fayette County. Earnings were lower than Woodstock as well, with the exception of the *Graduate or Professional Degree* category.
	58.8% of those working in Fayetteville live outside the area (in-commute).
	6,519 workers that live in Fayetteville travel outside the area for employment (out-commute).
	Over the last 10 years, the number of workers *Living in Fayetteville but Employed Outside* (out-commuters) has increased 40.8% or 1,890 more workers.

Economic Dynamics	
	The 2015 estimated average weekly wage in Fayetteville is $719. The average wage applies to employees that work in Fayetteville regardless of residence. This average wage is the third lowest among the study areas, with the lowest in Opelika.
	Over the five year period of 2010 to 2015, the estimated average weekly wage in Fayetteville increased by $26 or 3.7%. This increase is well above the benchmark city of Opelika, but behind Woodstock, the County, the state, and the nation.
	For 2013, the per capita income in Fayetteville was $30,036, which was higher than the Opelika, as well as the state and the nation, but lower than Woodstock and Fayette County.
	Over 11.2% of workers in Fayetteville classify themselves as *Self-Employed*, which is the second only to Fayette County which had 11.4% *Self-Employed*.
	Median earnings among those Fayetteville workers classified as *Self-Employed in Own Not Incorporated Business* were the lowest among the study areas at $18,049.
	Among residents ages 16 and over in Fayetteville, 58.1% are employed, which falls between the two benchmark cities, is below the County, but above both the state and nation.
	Fayetteville's proportion of families with two income earners (*Married, Husband and Wife in Labor Force)* is 43.3%, which is higher than Opelika, the state, and the nation, but lower than Woodstock and the County.
	Compared to the nation and the state, Fayetteville has the highest total share of households with incomes in the $15,000 to $24,999 category. Fayetteville's proportion of those above $100,000 is 26.4%, which is below the overall county average of 38.5% and Woodstock's average of 28.5%.
	Of 20 major industry categories, Fayetteville has the highest relative percentage in one industry: *Health Care and Social Assistance*.
	The 2015 composite cost-of-living index for Fayette County-Fayetteville is estimated to be 93.4. This is lower than Auburn-Opelika and the national average.
	Households in Fayetteville have the greatest access to DSL and cable broadband compared to the benchmark cities, the County, state, and nation.

Economic Dynamics (continued)	
	Fayetteville's average percentage of retail leakage is 59.4, indicating that shoppers from Fayetteville spend less than half of their disposable income in the City.
	The largest retail gap (indicating local consumers travel outside Fayetteville to satisfy their retail demands) is in *Motor Vehicle & Parts Dealers* at $212.9 million, followed by *General Merchandise Stores* with an $86.2 million gap.

Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Fayetteville. This information is not benchmarked to the nation, the state, or benchmark cities:

- ✓ Since 2010, the largest absolute industry jobs gains in Fayetteville came from *Health Care & Social Assistance*, up 1,028 jobs or 27 percent, followed closely by *Accommodation & Food Services*, up 1,019 jobs or 61 percent.
- ✓ There were significant job losses in *Government* (-454 jobs or 9 percent); *Professional, Scientific & Technical Services* (-75 jobs or 7 percent); *Real Estate & Rental & Leasing* (-57 jobs or 20 percent); and *Crop & Animal Production* (-33 jobs or 56 percent).
- ✓ Industrial average earnings in Fayetteville are above the national same-industry average in two major sectors: *Manufacturing* (10.3 percent higher) and *Transportation & Warehousing* (8.8 percent higher).
- ✓ Over the last five years, the single largest absolute occupational gains in Fayetteville came from *Food Preparation & Serving Related*, up 909 jobs or 48 percent.
- ✓ Fayetteville's median hourly earnings are above the nation for *Military* and *Farming, Fishing & Forestry,* but below the nation for the other 22 occupational sectors.
- ✓ Five industry sectors in Fayetteville have a level of local specialization above 1.0 (which indicates a larger percentage than the national average) and have grown within the last five years: *Health Care & Social Assistance, Accommodation & Food Services, Retail Trade, Construction, and Other Services*. The single industry at risk is *Government*, which has a strong local specialization at 1.2 but experienced a loss of 454 jobs over the past five years.
- ✓ *Motion Picture and Video Production*, a sub-sector of the *Information* category, may be classified as an *Emerging* industry due to new studios in Fayetteville. Using the Atlanta MSA and the State of Georgia as comparisons, both show this sub-sector as *Emerging*.
- ✓ Four main industry sectors with strong local competitive effects were *Accommodation & Food Services, Health Care & Social Assistance, Construction, and Transportation & Warehousing.*
- ✓ Over the last five years, the occupational groups of *Food Preparation & Serving Related, Healthcare Practitioners & Technical, Sales & Related, Healthcare Support, Construction & Extraction, Personal Care & Service,* and *Community & Social Service* each experienced job growth while exhibiting local specialization.

Chapter 4: Demographic & Labor Dynamics

Population Growth

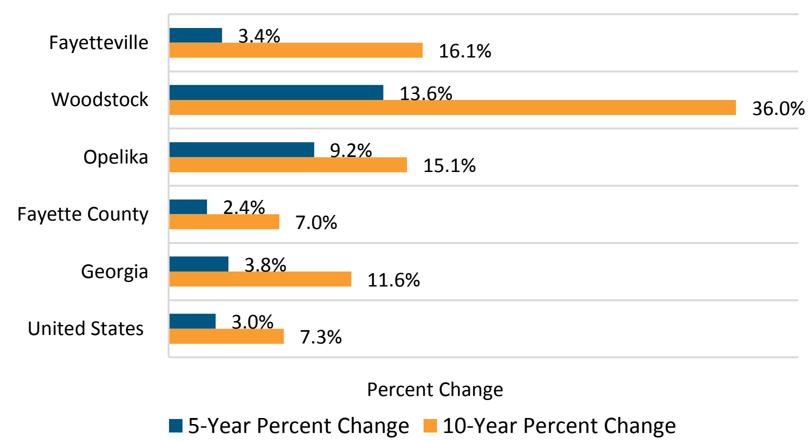
The rate of population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site-selection decisions. Most firms are wary of areas with population declines, very slow growth rates, or significant amounts of domestic out-migration.

Fayetteville's population has grown by 2,698 (to 16,725 residents) over the past decade. This marks an increase of 16.1 percent, which is above Opelika, Fayette County, the state, and the nation, but below the benchmark city of Woodstock (Figure 8 and Table 1).

Chapter Data

As with most areas in the nation, the pace of population growth in Fayetteville has been slowing over the past decade. Over the last five years, the annual rate of population growth in Fayetteville has been 1.5 percent, while over 10 years, the rate averaged 2.2 percent (Table 2). Fayetteville's 5- and 10-year annual pace of population growth is above the County, the state, and the nation. The rate of change falls below Woodstock and Opelika's 5-year growth rate.

Figure 8
Net Population Change 2005–2014 (%)



Source: US Census Bureau Population Estimates, Garner Economics

Table 1
Net Population Change 2005–2014
(Highest Relative Figure Shaded)

	2014 Population	2010–2014 5-Year Change	5-Year Percent Change	2005–2014 10-Year Change	10-Year Percent Change
Fayetteville	16,725	569	3.4%	2,698	16.1%
Woodstock	27,823	3,796	13.6%	10,030	36.0%
Opelika	29,171	2,696	9.2%	4,417	15.1%
Fayette County	109,664	2,674	2.4%	7,703	7.0%
Georgia	10,097,343	382,879	3.8%	1,171,421	11.6%
United States	318,857,056	9,509,999	3.0%	23,340,457	7.3%

Source: US Census Bureau Population Estimates, Garner Economics

Table 2
Average Annual Rate of Population Change 2005–2014
(Highest Relative Figure Shaded)

	5-Year	10-Year
Fayetteville	1.5%	2.2%
Woodstock	3.7%	5.5%
Opelika	2.1%	1.9%
Fayette County	0.8%	1.0%
Georgia	1.0%	1.4%
United States	0.8%	0.9%

Source: US Census Bureau Population Estimates, Garner Economics

Sources of New Residents

Attracting new residents from a diversity of outside locations can reflect a community's broader appeal and provide an indicator of economic dynamism to businesses.

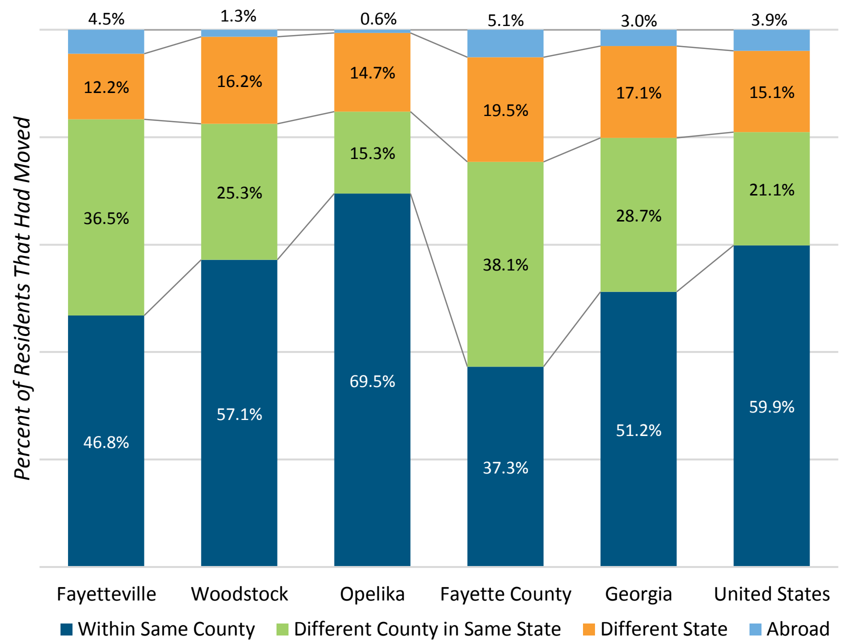
Fayetteville attracted 36.5 percent of its new residents from a *Different County in Same State*, a higher proportion than was experienced in both benchmark cities, the state, and the nation (Figure 9 and Table 3). Fayetteville attracted the lowest relative proportion of new residents from a *Different State*. Both Fayetteville and Fayette County attracted a higher proportion of new residents from *Abroad*—slightly below Fayette County, however more than other benchmarks, the state, and the nation.

Table 3
2009–2013 Five-Year Estimates
Previous Location of Residents That Had Moved One Year Earlier
(Highest Relative Figure Shaded)

	Within Same County	Different County in Same State	Different State	Abroad
Fayetteville (#)	1,162	911	304	112
Fayetteville (%)	46.8%	36.5%	12.2%	4.5%
Woodstock	57.1%	25.3%	16.2%	1.3%
Opelika	69.5%	15.3%	14.7%	0.6%
Fayette County	37.3%	38.1%	19.5%	5.1%
Georgia	51.2%	28.7%	17.1%	3.0%
United States	59.9%	21.1%	15.1%	3.9%

Source: US Census Bureau American Community Survey, Garner Economics

Figure 9
2009–2013 Five-Year Estimates
Previous Location of Residents That Had Moved One Year Earlier



Source: US Census Bureau American Community Survey, Garner Economics

Population by Race and Hispanic Origin

By itself, racial diversity is not a determinant factor in local economic competitiveness, although some firms may prefer higher rates of diversity in order to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States.

Relative to the benchmark cities, the County, the state, and the nation, Fayetteville has a higher proportion of residents classifying themselves as *Asian* and *Two or More Races* (Table 4). Among all of the study areas, Fayetteville has the second most racially diverse population.

Table 4
2009–2013 Five-Year Estimates
Race & Hispanic Origin by Percentage of Total Population
(Highest Relative Figure Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
White	52.3%	81.8%	50.2%	72.0%	60.6%	74.0%
Black or African American	33.6%	8.6%	42.4%	20.1%	30.7%	12.6%
Asian	8.6%	4.5%	1.2%	4.0%	3.4%	4.9%
Some Other Race	1.5%	1.6%	4.0%	0.9%	3.0%	4.7%
Two or More Races	3.7%	2.9%	2.1%	2.6%	2.0%	2.8%
American Indian & Alaska Native	0.3%	0.5%	0.1%	0.2%	0.2%	0.8%
Native Hawaiian & Other Pacific Islander	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%
Hispanic or Latino (of any race)	4.3%	7.2%	5.5%	6.6%	8.9%	16.6%

Source: US Census Bureau American Community Survey, Garner Economics

Age

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers.

Median Age

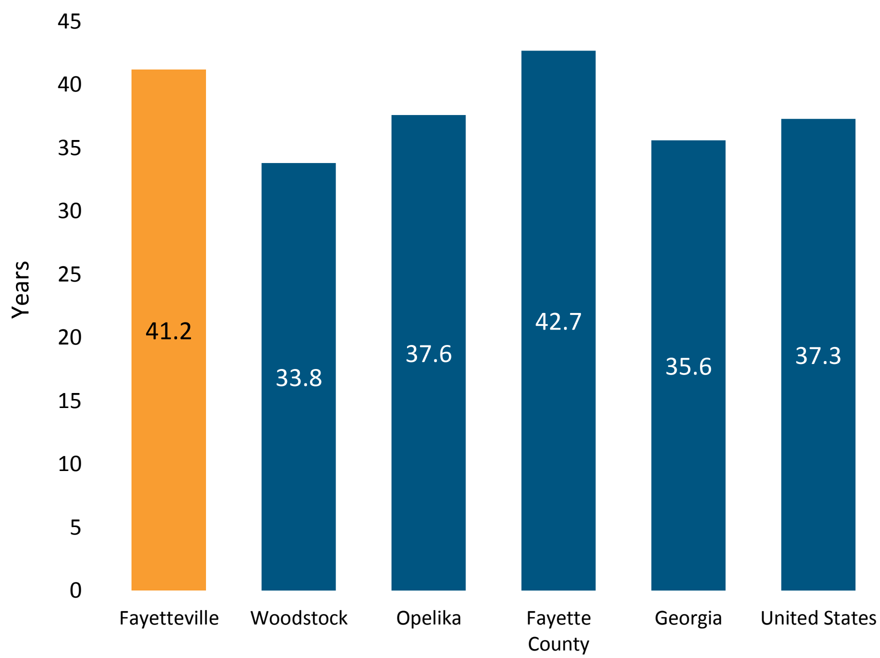
At 41.2 years, the median age in Fayetteville is higher than both benchmark cities, the state, and the nation, but slightly lower that the county average (Table 5 and Figure 10).

Table 5
2009–2013 Five-Year Estimates
Age Groups by Percentage of Total Population
(Highest Relative Figure Shaded)

	Fayetteville		Woodstock	Opelika	Fayette County	Georgia	United States
	#	%					
Median Age	**41.2**	**-**	**33.8**	**37.6**	**42.7**	**35.6**	**37.3**
<5	982	6.1%	9.1%	6.4%	4.5%	6.9%	6.4%
5–9	1,143	7.1%	10.6%	6.4%	6.6%	7.1%	6.6%
10–14	1,369	8.5%	6.2%	6.5%	8.6%	7.1%	6.6%
15–19	1,224	7.6%	3.9%	7.0%	8.8%	7.3%	7.0%
20–24	805	5.0%	5.0%	6.2%	4.8%	7.2%	7.1%
25–34	1,385	8.6%	16.6%	14.3%	7.4%	13.7%	13.4%
35–44	2,399	14.9%	18.4%	12.1%	13.0%	14.2%	13.1%
45–54	2,432	15.2%	11.8%	14.6%	18.1%	14.2%	14.3%
55–59	1,143	7.1%	4.5%	6.7%	8.4%	6.0%	6.5%
60–64	821	5.1%	3.7%	6.0%	6.1%	5.2%	5.6%
65–74	1,111	6.9%	6.2%	7.7%	8.3%	6.6%	7.3%
75–84	950	5.9%	3.2%	4.9%	4.0%	3.3%	4.3%
>85	354	2.2%	1.1%	1.4%	1.5%	1.2%	1.8%

Source: US Census Bureau American Community Survey, Garner Economics

Figure 10
2009–2013 Five-Year Estimates
Median Age

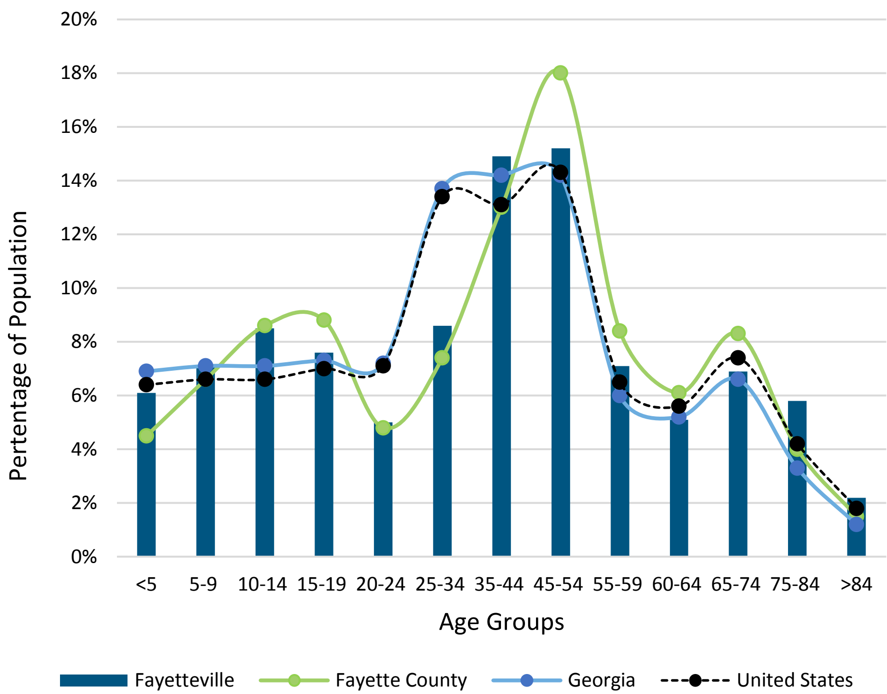


Source: US Census Bureau American Community Survey, Garner Economics

Age Group Composition

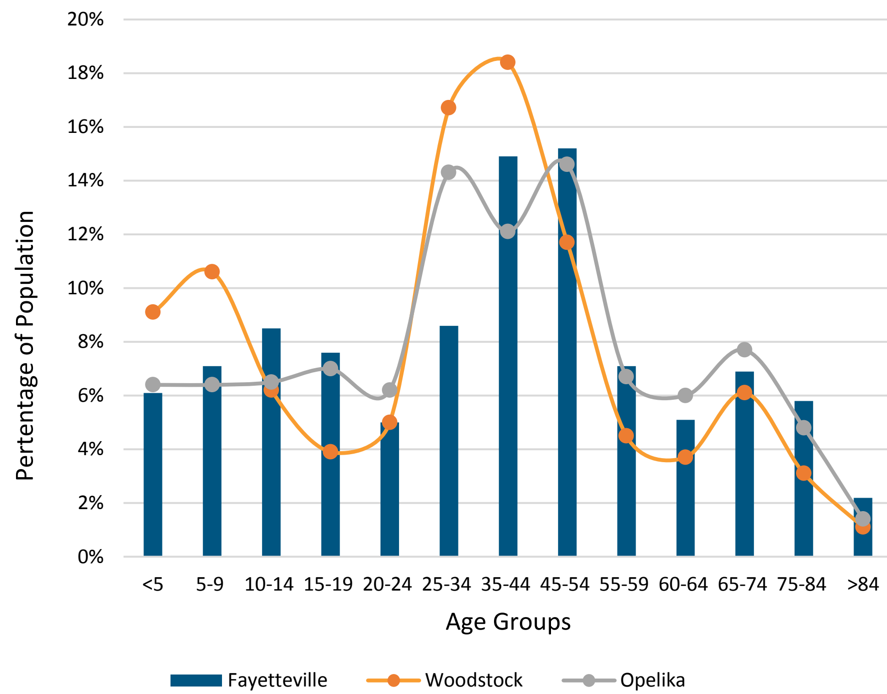
Fayetteville's highest proportion of residents is in two age groups: *35–44* and *45–54* (Figures 11 & 12 and Table 5). Fayetteville has the highest proportion of those aged 85 and older. Both Fayetteville and Fayette County are below all other geographies in the *Ages 25–34* category.

Figure 11
2009–2013 Five-Year Estimates
Age Groups by Percentage of Total Population



Source: US Census Bureau American Community Survey, Garner Economics

Figure 12
2009–2013 Five-Year Estimates
Age Groups by Percentage of Total Population



Source: US Census Bureau American Community Survey, Garner Economics

Crime

Crime rates may seem outside the typical measures of economic competitiveness, but they represent a widely accepted objective gauge used by firms. Crime rates generally reflect underlying economic conditions and may signal deeper systemic problems better than standard economic measures.

In 2014, Fayetteville's violent crime incidents reported were well below Opelika and slightly below Woodstock. The crime rate per 10,000 residents for Fayetteville is higher than Woodstock and Fayette County but lower than Opelika, the state, and the nation (Figure 13, 14 and Table 6).

Table 6

2014 Crime Rates per 10,000 Residents

(Highest Relative Figure Shaded)

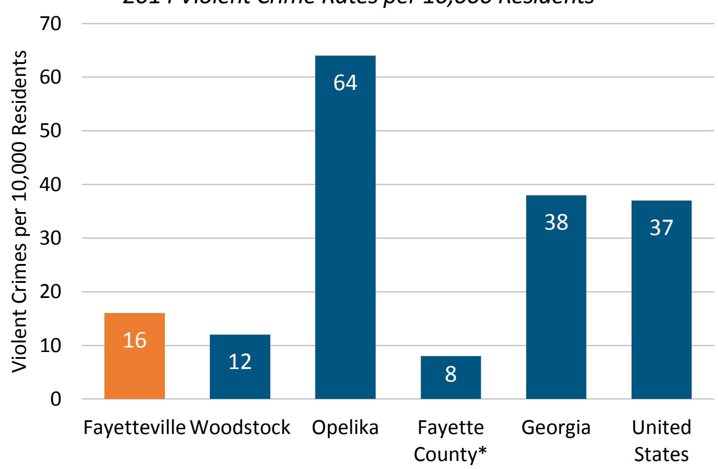
Actual Incidents Reported	Fayetteville	Woodstock	Opelika	Fayette County*	Georgia	United States
Violent	27	32	188	83	38,097	1,165,383
Property	462	648	1,622	1,580	331,316	8,277,829
Rate Per 10,000 Residents	Fayetteville	Woodstock	Opelika	Fayette County*	Georgia	United States
Population	16,424	27,665	29,201	109,664	10,097,343	318,857,056
Violent	16	12	64	8	38	37
Property	281	234	555	144	328	260

Source: FBI Uniform Crime Reports, Georgia Bureau of Investigation, Garner Economics

**Fayette County rate consists of reported crime from the Fayette County Sheriff's office, Fayetteville, Peachtree City, and Tyrone police*

Figure 13

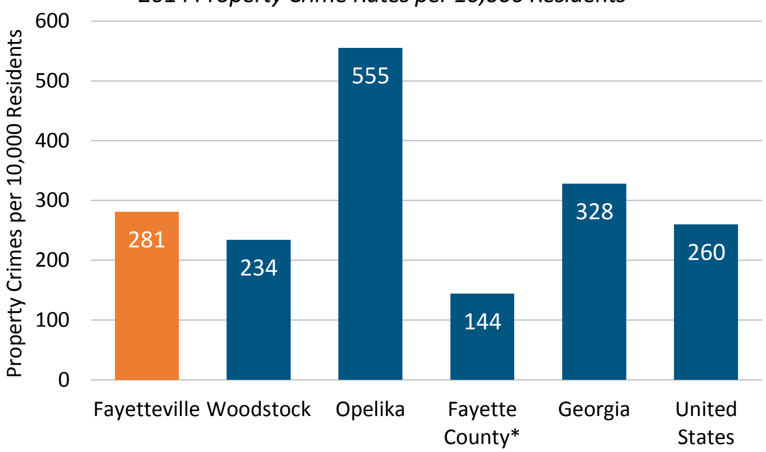
2014 Violent Crime Rates per 10,000 Residents



Source: FBI Uniform Crime Reports, Georgia Bureau of Investigation, Garner Economics

Figure 14

2014 Property Crime Rates per 10,000 Residents



Source: FBI Uniform Crime Reports, Georgia Bureau of Investigation, Garner Economics

Education

Increasingly, the level of education of a community's population is becoming a decisive factor in economic competitiveness. Firms understand the need to operate in economies that offer a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

Educational Attainment

Educational attainment among the majority of Fayetteville's population ages 25+ holds at least a high school diploma, with 42 percent holding a *Bachelor's Degree* or *Graduate or Professional degree*. (Figure 15, Figure 16, and Table 7). With the exception of Woodstock, Fayetteville has the lowest proportion of residents whose educational attainment was *Less than 9th Grade.*

Table 7
2009–2013 Five-Year Estimates
Educational Attainment, Percentage Total Population Age 25+
(Highest Relative Figure Shaded)

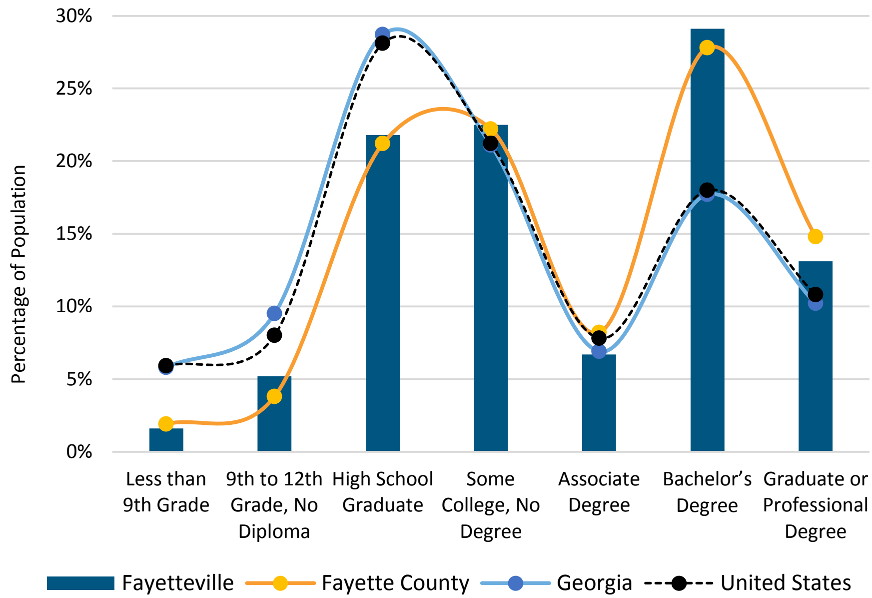
	Fayetteville		Woodstock	Opelika	Fayette County	Georgia	United States
	#	%					
Less than 9th Grade	170	1.6%	1.1%	4.6%	1.9%	5.8%	5.9%
9th to 12th Grade, No Diploma	551	5.2%	3.7%	12.8%	3.8%	9.5%	8.0%
High School Graduate	2,310	21.8%	19.4%	29.4%	21.2%	28.7%	28.1%
Some College, No Degree	2,385	22.5%	24.6%	21.6%	22.2%	21.1%	21.2%
Associate Degree	710	6.7%	7.8%	5.9%	8.2%	6.9%	7.8%
Bachelor's Degree	3,084	29.1%	30.5%	15.5%	27.8%	17.7%	18.0%
Graduate or Professional Degree	1,388	13.1%	12.8%	10.2%	14.8%	10.2%	10.8%

Source: US Census Bureau American Community Survey, Garner Economics

Figure 15

2009–2013 Five-Year Estimates

Educational Attainment, Percentage Total Population Age 25+

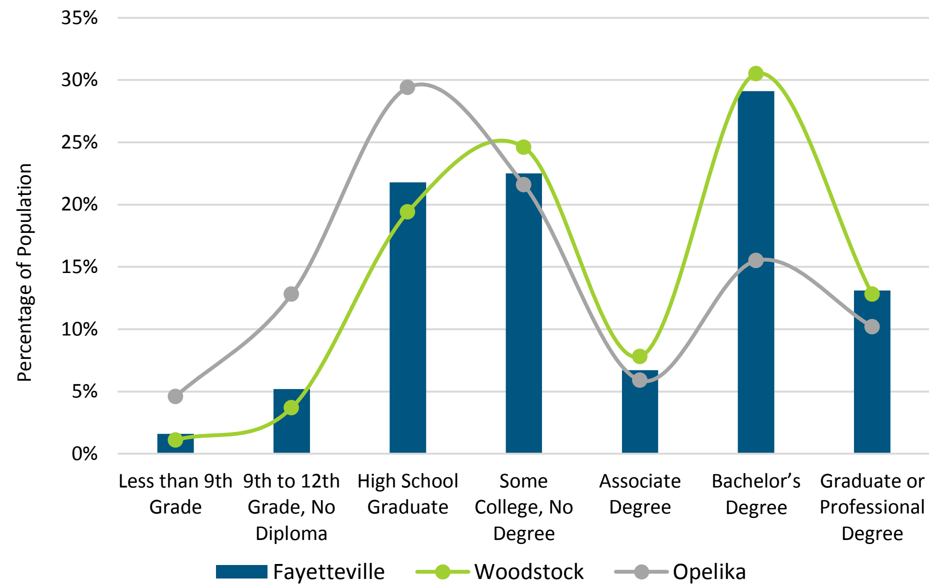


Source: US Census Bureau American Community Survey, Garner Economics

Figure 16

2009–2013 Five-Year Estimates

Educational Attainment, Percentage Total Population Age 25+



Source: US Census Bureau American Community Survey, Garner Economics

SAT Scores

The SAT exam is a standardized test for college admissions in the United States and a widely accepted measure of education quality. SAT scores are especially relevant to businesses because they provide a measure of the "final product" of public schools and the educational quality of those entering the workforce.

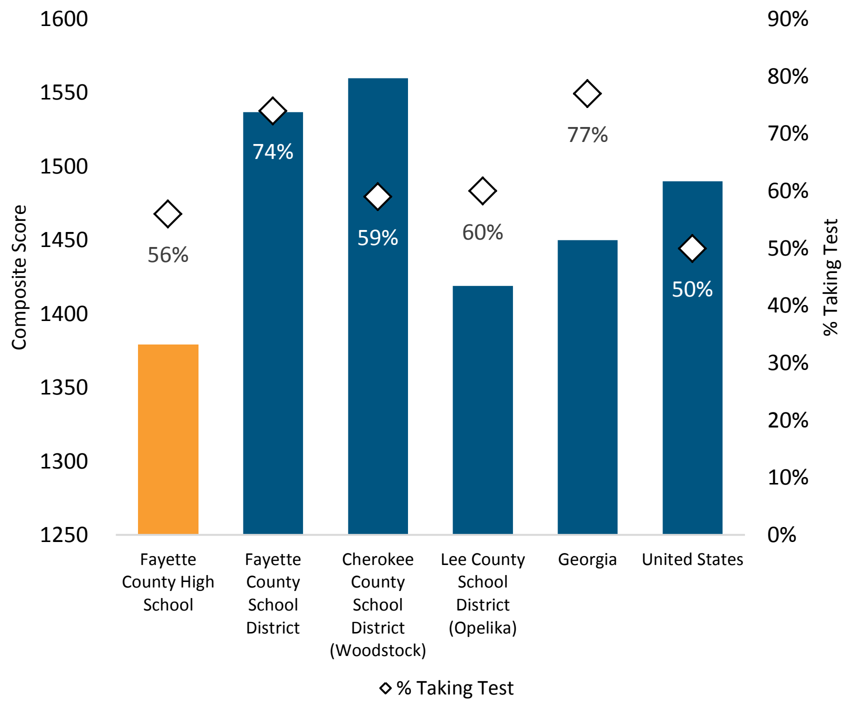
At 1379, Fayetteville's 2015 composite SAT total score is below all of the comparison study areas (Table 8 and Figure 17).

Table 8
2015 SAT Scores
(Highest Score Shaded)

	% Taking Test	Composite
Fayette County High School	56%	1379
Fayette County School District	74%	1537
Cherokee County School District (Woodstock)	59%	1560
Lee County School District (Opelika)	60%	1419
Georgia	77%	1450
United States	50%	1490

Source: Georgia Department of Education, Fayette County School District, Cherokee County School District, Lee County School District, The College Board, Garner Economics

Figure 17
2015 SAT Scores



Source: Georgia Department of Education, Fayette County School District, Cherokee County School District, Lee County School District, The College Board, Garner Economics

High School Graduation Rates

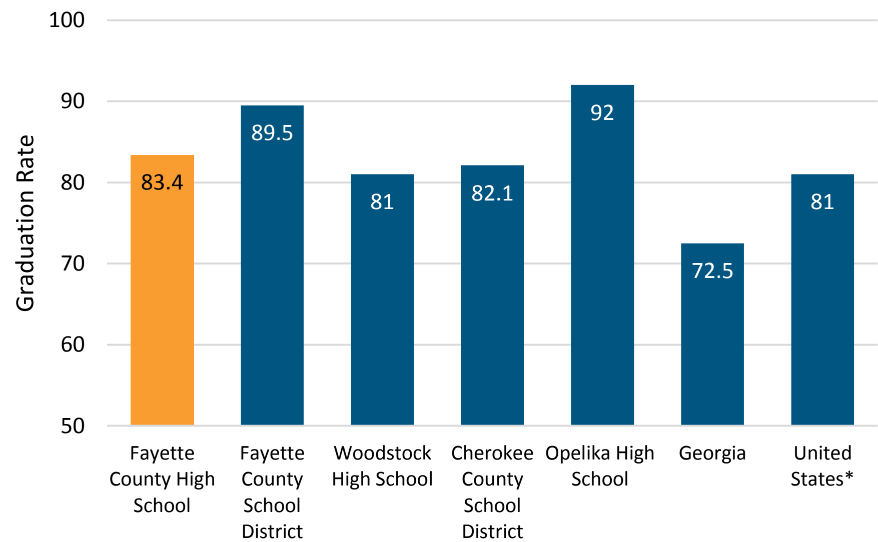
The share of high school students graduating within four years of beginning 9th grade is another important measure of the performance of local school districts. Fayette County School District has the second highest graduation rate at 89.5 percent, behind Opelika High School, the only high school within the City's school district. Fayette County High School ranks above Woodstock High School and Cherokee County School District (including Woodstock), as well as the state and the nation. (Table 9 and Figure 18).

Table 9
2014 Four-Year Cohort High School Graduation Rates
(Highest Score Shaded)

	Graduation Rate
Fayette County High School	83.4
Fayette County School District	89.5
Woodstock High School	81.0
Cherokee County School District	82.1
Opelika High School	92.0
Georgia	72.5
United States*	81.0

Source: Georgia Department of Education; Alabama State Department of Education, National Center for Education Statistics
**2013 data*

Figure 18
2014 Four-Year Cohort High School Graduation Rates



Source: Georgia Department of Education; Alabama State Department of Education, National Center for Education Statistics
**2013 data*

Population In-Migration by Educational Attainment

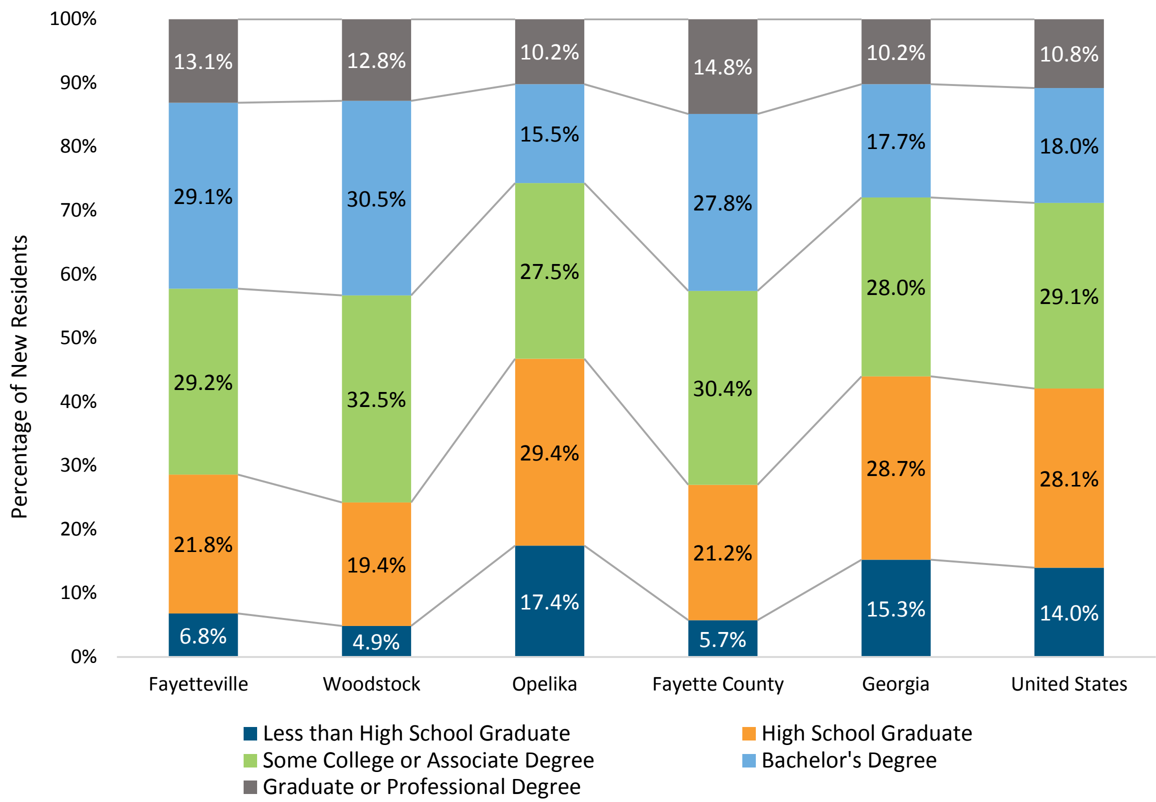
Among Fayetteville's new residents ages 25 and over, 42.3 percent hold a bachelor's degree or higher. This is greater than Opelika, the state, and the nation, but only slightly lower than Woodstock and the entire County (Table 10 and Figure 19). Conversely, the area attracts a lower relative proportion of new residents whose highest level of educational attainment is *Less than High School Graduate* than all of the study areas other than Woodstock and the County as a whole.

Table 10
2013 Educational Attainment by Percentage of New Resident Population
Ages 25 and over
(Highest Percentage Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Less than High School Graduate	6.8%	4.9%	17.4%	5.7%	15.3%	14.0%
High School Graduate	21.8%	19.4%	29.4%	21.2%	28.7%	28.1%
Some College or Associate Degree	29.2%	32.5%	27.5%	30.4%	28.0%	29.1%
Bachelor's Degree	29.1%	30.5%	15.5%	27.8%	17.7%	18.0%
Graduate or Professional Degree	13.1%	12.8%	10.2%	14.8%	10.2%	10.8%

Source: US Census Bureau American Community Survey, Garner Economics

Figure 19
2009–2013 Five-Year Estimates
Educational Attainment by Percentage of New Resident Population
Ages 25 and over



Source: US Census Bureau American Community Survey, Garner Economics

Median Earnings by Level of Educational Attainment

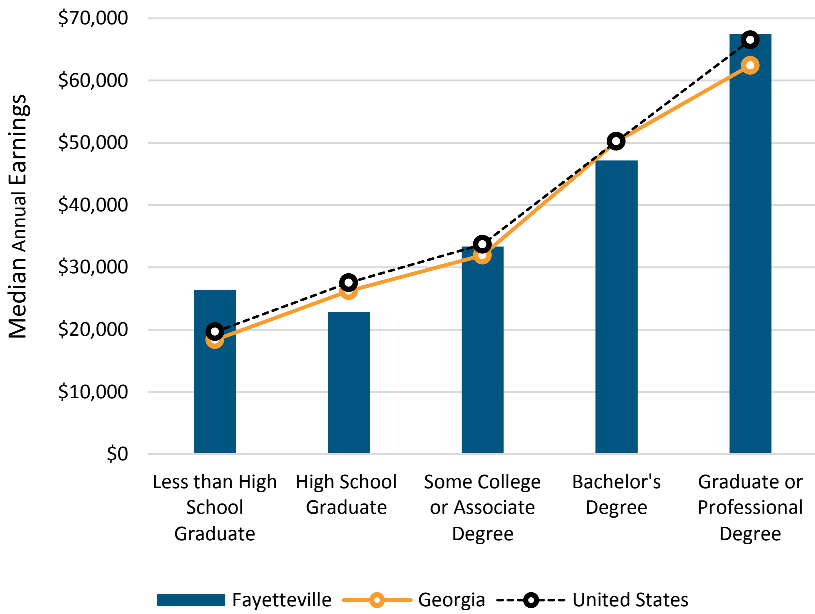
Among Fayetteville residents ages 25 and over, median earnings are higher than the category averages for *Less than High School Graduate, Bachelor's Degree* and *Graduate or Professional Degree*. Although neither the highest nor lowest in any individual category, median earnings are the second highest for *Less than High School Graduate* and *Graduate or Professional Degree*. (Table 11, Figure 20, and Figure 21).

Table 11
2009–2013 Five-Year Estimates
Median Earnings by Educational Attainment
Ages 25+
(Inflation-Adjusted 2013 Dollars, Highest Relative Number Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Less than High School Graduate	$26,400	$30,592	$11,896	$21,172	$18,361	$19,652
High School Graduate	$22,800	$35,288	$21,642	$30,588	$26,239	$27,528
Some College or Associate Degree	$33,378	$42,500	$27,182	$37,285	$31,954	$33,702
Bachelor's Degree	$47,179	$55,945	$44,633	$58,131	$50,215	$50,254
Graduate or Professional Degree	$67,465	$52,643	$54,134	$75,229	$62,411	$66,493

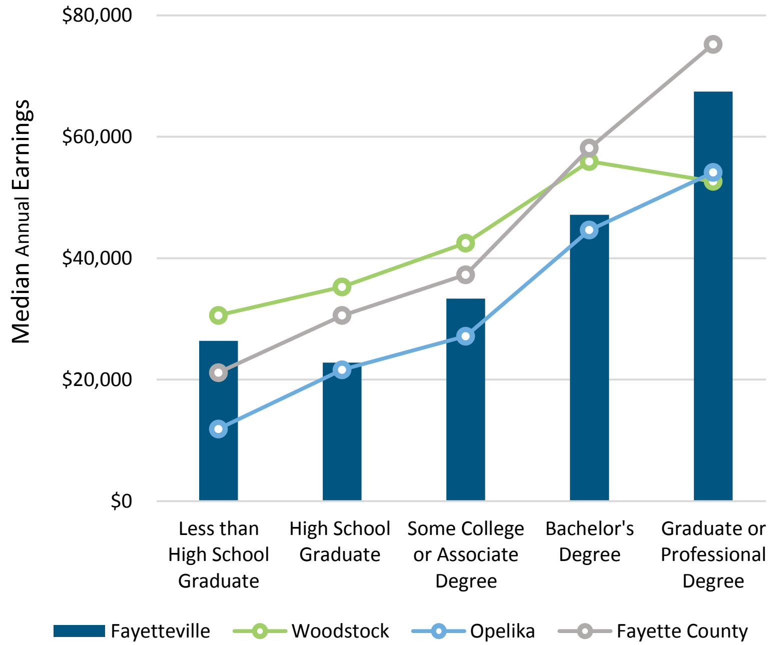
Source: US Census Bureau American Community Survey, Garner Economics

Figure 20
2009–2013 Five-Year Estimates
Median Earnings by Educational Attainment
Ages 25+
(Inflation-Adjusted 2013 dollars)



Source: US Census Bureau American Community Survey, Garner Economics

Figure 21
2009–2013 Five-Year Estimates
Median Earnings By Educational Attainment
Ages 25+
(Inflation-Adjusted 2013 dollars)



Source: US Census Bureau American Community Survey, Garner Economics

Worker Flows

Worker flows help define the size of a local economy's labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments (major construction projects, on-site consulting, etc.).

In 2013, of those working in Fayetteville, 749 or 4.2 percent of the total workforce also lived in Fayetteville. More significantly, 10,377 or 58.8 percent of workers in Fayetteville lived outside the area (in-commute). Another 6,519 or 36.9 percent of workers that lived in Fayetteville traveled outside the area for employment (out-commute) (Table 12 and Figure 22).

Over the last 10 years, the number (and proportion) of workers who both live and work in Fayetteville has decreased 5.5 percent or 44 workers (Table 12 Figure 23, and Figure 24). Over the same period, the number of workers *Employed in Fayetteville but Living Outside (in-commuters)* increased by 23.1 percent or 1,945 more workers. Most significantly, the number of workers *Living in Fayetteville but Employed Outside (out-commuters)* increased 40.8 percent or 1,890 more workers.

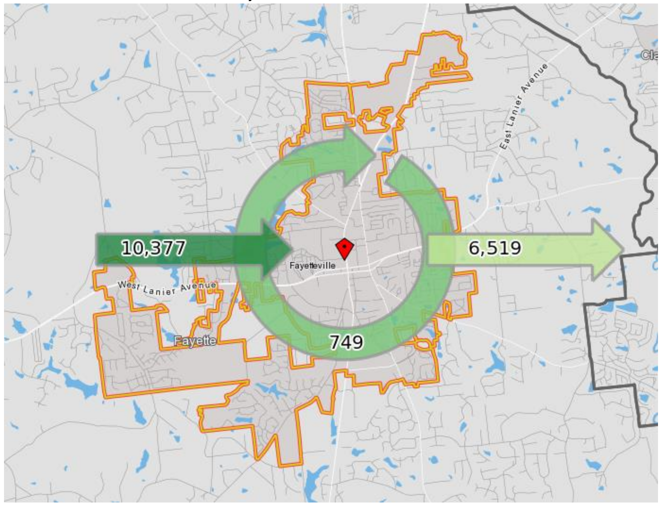
In 2013, 18.9 percent of Fayetteville's resident workforce (1,371) was employed in the City of Atlanta (Table 13).

Table 12
Fayetteville Worker Flows*

	2003	2013	2003–2013 Change	
Living & Employed in Fayetteville	793	749	-44	-5.5%
Living in Fayetteville but Employed Outside (out-commuters)	4,629	6,519	1,890	40.8%
Employed in Fayetteville but Living Outside (in-commuters)	8,432	10,377	1,945	23.1%

**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, Garner Economics

Figure 22
*2013 Fayetteville Worker Flows**



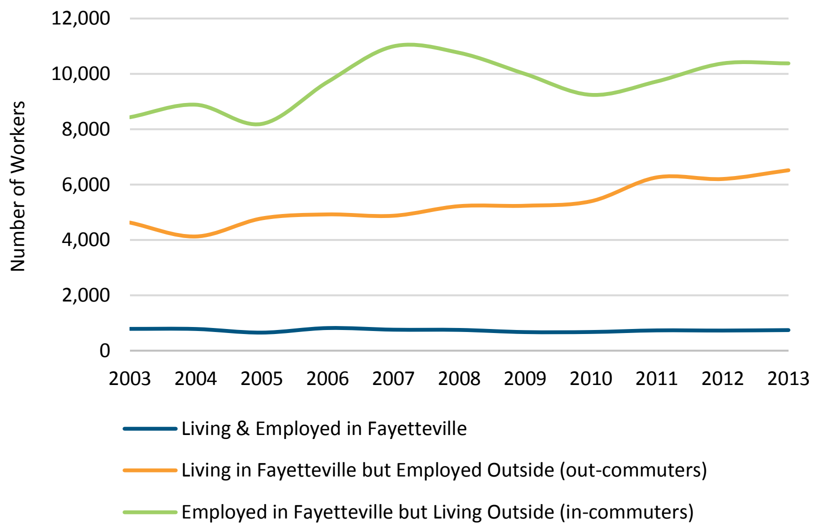
**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, LHD, Garner Economics

Table 13
2013 Fayetteville Worker Flows*

City	Number	Percent
Atlanta	1,371	18.9%
Fayetteville	749	10.3%
Peachtree City	380	5.2%
College Park	194	2.7%
Sandy Springs	141	1.9%
Jonesboro	76	1.0%
East Point	73	1.0%
Hapeville	72	1.0%
Riverdale	72	1.0%
Dunwoody	70	1.0%

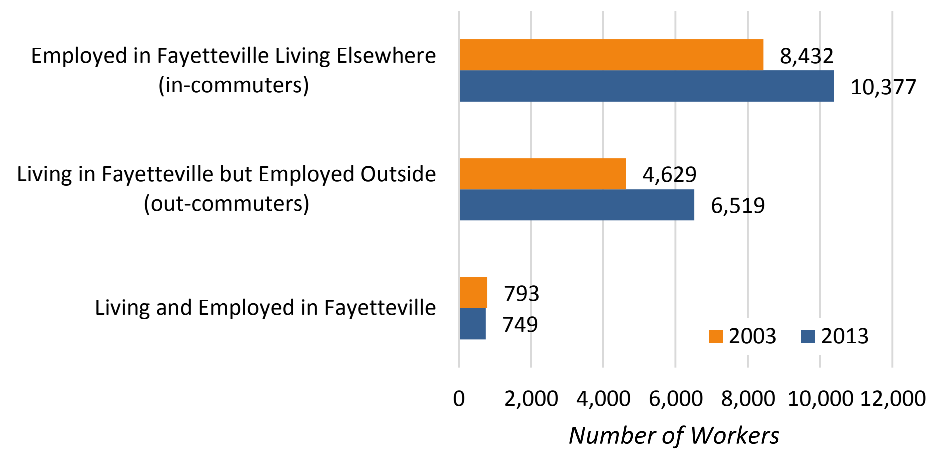
**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, Garner Economics

Figure 23
Fayetteville Worker Flows*



**The Census Bureau counts one primary job per worker.*
Source: US Census Bureau, Garner Economics

Figure 24
Fayetteville Worker Flows
2003–2013 Change*



****The Census Bureau counts one primary job per worker.***
Source: US Census Bureau, Garner Economics

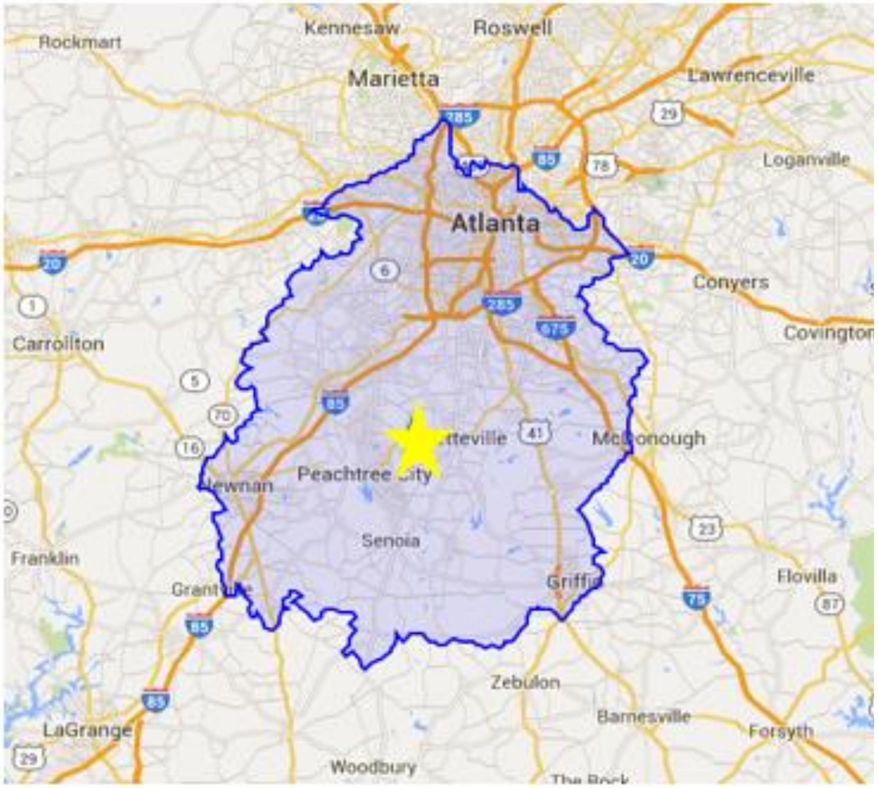
Effective Labor Draw

The effective labor draw considers the documented labor pool for a particular geographic location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within representative drive-time radiuses from a site. The analysis does not rely on broad aggregates, but instead on actual demonstrated worker behavior within the established street and highway system.

According to a calculation of a 45-minute drive-time from Fayetteville, the United States Census Bureau estimates a total active residential workforce of 2,475,397 people as of 2015 (Figure 25 and Table 14). A more constrained 30-minute drive-time from the site shows a total active residential workforce of 1,374,518 people.

The number of active residential workers in the 45-minute and 30-minute drive-time labor draw areas has grown over the last 10 years. The 10-year change was 10.2 percent within the 45-minute drive-time area and a total increase of 229,326 workers overall. Within the 30-minute drive-time area, the change was 8.8 percent and an 111,735 worker increase over 10 years (Table 14).

Figure 25
Effective Labor Draw
45-Minute Drive-Time



Source: Georgia Power Company–Economic Development Department, Garner Economics

Table 14
Change in Active Residential Workforce

	2005	2015	10-Year Change
30-Minute Drive-Time	1,262,783	1,374,518	111,735
45-Minute Drive-Time	2,246,071	2,475,397	229,326

Source: STATS Indiana, Garner Economics

Chapter 5: Economic Dynamics

Estimated Average Weekly Wage

The 2015 estimated average weekly wage in Fayetteville is $719. The average wage applies to employees that work in Fayetteville regardless of residence. This average wage is the third lowest among the study areas, with the lowest in Opelika. (Table 15 and Figure 26).

Over the five-year period of 2010 to 2015, the estimated average weekly wage in Fayetteville increased by $26 or 3.7 percent. This increase is well above Opelika and Fayette County, but behind Woodstock, the state, and the nation. (Table 15, Figure 27).

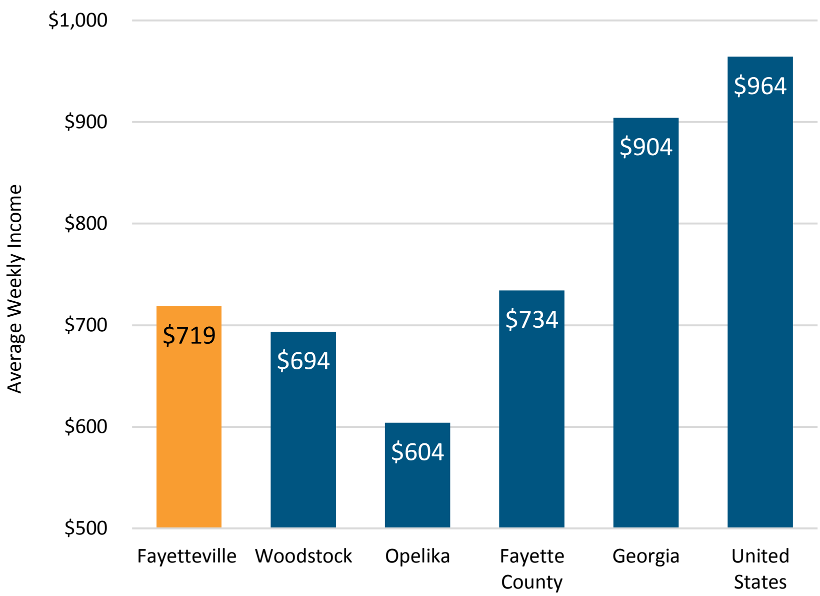
Table 15
2010–2015 Change in Estimated Average Weekly Wages
(Highest Relative Number Shaded)

	2015	2010–2015	
		$	%
Fayetteville	$719	$26	3.70%
Woodstock	$694	$62	9.85%
Opelika	$604	$8	1.28%
Fayette County	$734	$6	0.77%
Georgia	$904	$69	8.32%
United States	$964	$78	8.76%

Source: EMSI 2nd Quarter 2015, Garner Economics

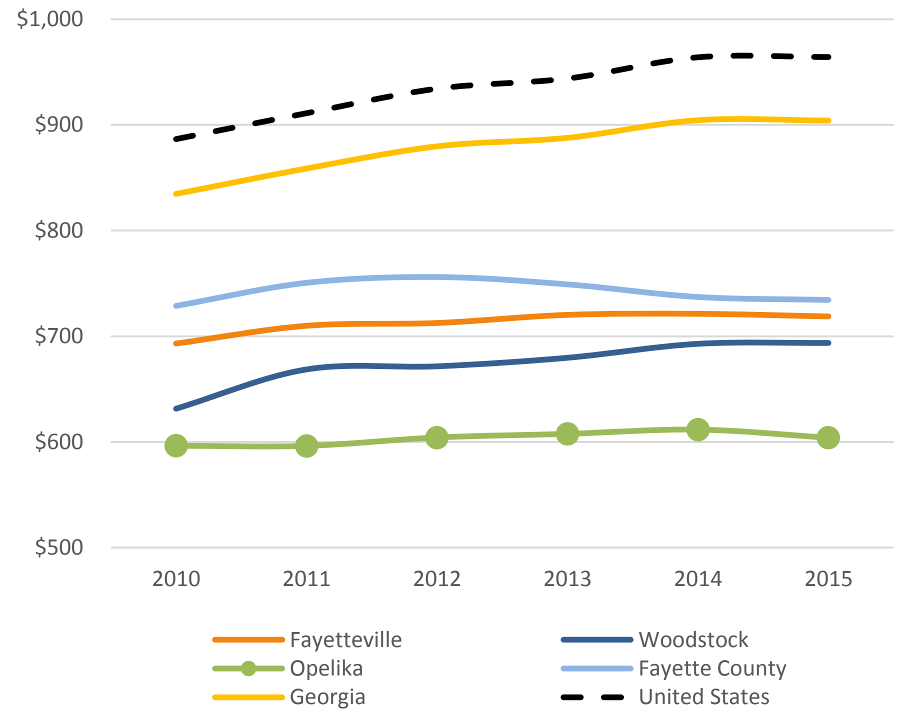
Chapter Data

Figure 26
2015 Estimated Average Weekly Wages



Source: EMSI 2nd Quarter 2015, Garner Economics

Figure 27
2010–2015 Average Weekly Wages
In Actual Dollars



Source: EMSI 2nd Quarter 2015, Garner Economics

Per Capita Income

Per capita income is the mean annual income computed for every man, woman, and child, derived by dividing the aggregate income by the total population. Unlike the previously examined estimated weekly wage, per capita income is a measure for all residents of Fayetteville, regardless of where they work.

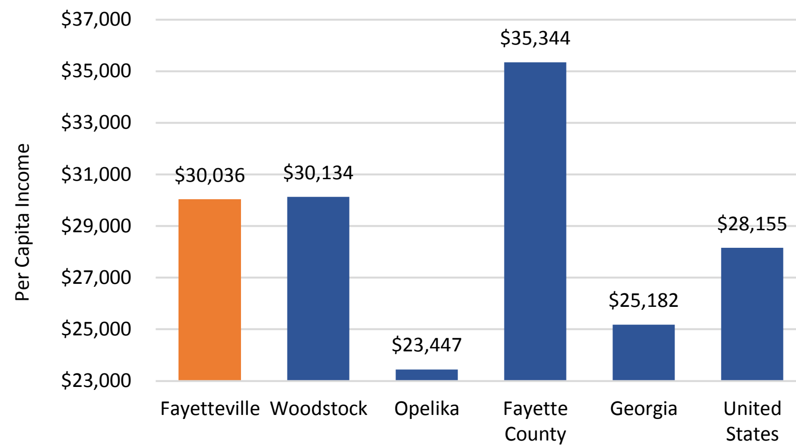
For 2013, the per capita income in Fayetteville was $30,036, which was higher than Opelika, the state, and the nation, but lower than Woodstock and Fayette County (Table 16 and Figure 28).

Table 16
2009–2013 Five-Year Estimates
Per Capita Income
(Highest Figure Shaded)

	Per Capita Income
Fayetteville	$30, 036
Woodstock	$30,134
Opelika	$23,447
Fayette County	$35,344
Georgia	$25,182
United States	$28,155

Source: US Census Bureau, Garner Economics

Figure 28
2009–2013 Five-Year Estimates
Per Capita Income



Source: US Census Bureau American Community Survey, Garner Economics

Self-Employment

Measuring the relative proportion of workers who are self-employed is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

In 2013, 11.2 percent of workers in Fayetteville were self-employed. This proportion is the second highest of all of the study areas. (Table 17 and Figure 29). Opelika had the lowest percentage at 6.8.

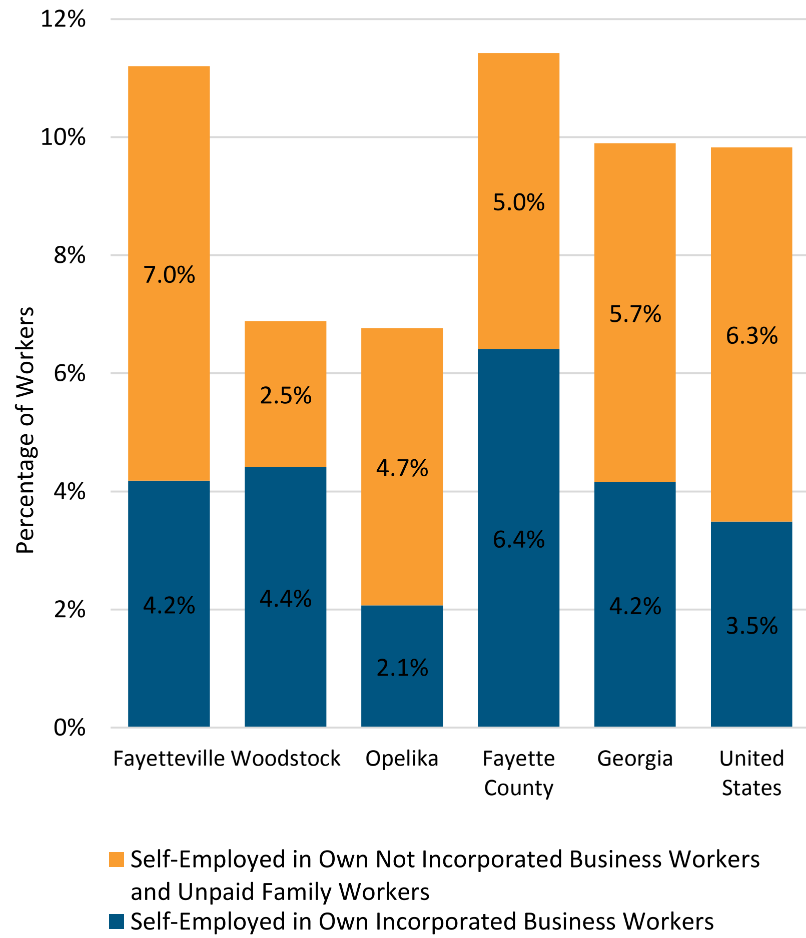
However, median earnings among those Fayetteville workers classified as *Self-Employed in Own Not Incorporated Business* were the lowest among the study areas (Figure 30 and Table 18) at $18,049.

Table 17
2009–2013 Five-Year Estimates
Self-Employed as a Percentage of Workers 16 Years+
(Highest Relative Number Shaded)

	Self-Employed in Own Incorporated Business	Self-Employed in Own Not Incorporated Business	Total
Fayetteville	4.2%	7.0%	11.2%
Woodstock	4.4%	2.5%	6.9%
Opelika	2.1%	4.7%	6.8%
Fayette County	6.4%	5.0%	11.4%
Georgia	4.2%	5.7%	9.9%
United States	3.5%	6.3%	9.8%

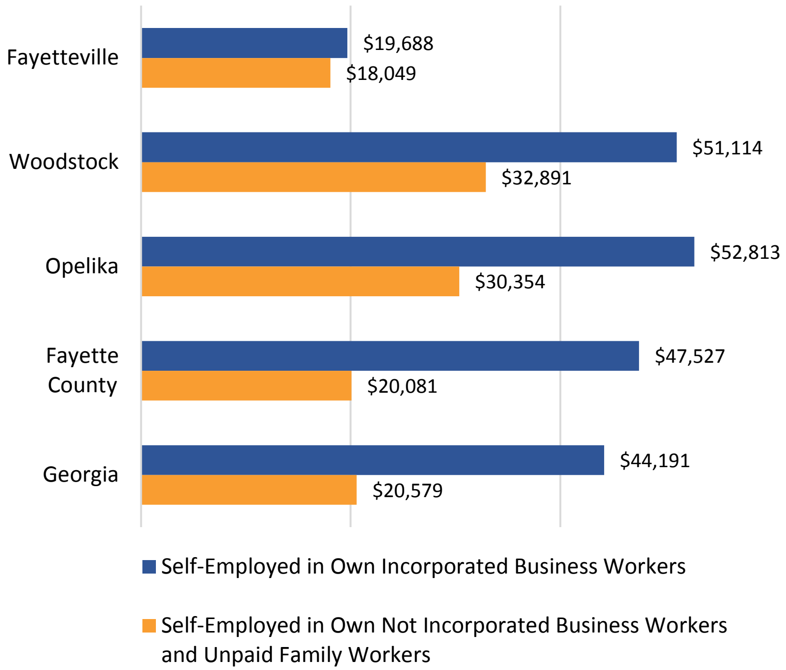
Source: US Census Bureau, Garner Economics

Figure 29
2009–2013 Five-Year Estimates
Self-Employed as a Percentage of Workers 16 Years+



Source: US Census Bureau, Garner Economics

Figure 30
2009–2013 Five-Year Estimates
Median Earnings
Self-Employed Workers 16 Years+



Source: US Census Bureau, Garner Economics

Table 18
2009–2013 Five-Year Estimates
Median Earnings
Self-Employed Workers 16 Years+
(Highest Relative Number Shaded)

	Self-Employed in Own Incorporated Business	Self-Employed in Own Not Incorporated Business
Fayetteville	$19,688	$18,049
Woodstock	$51,114	$32,891
Opelika	$52,813	$30,354
Fayette County	$47,527	$20,081
Georgia	$44,191	$20,579
United States	$49,027	$22,107

Source: US Census Bureau, Garner Economics

Labor Force Participation

Among residents ages 16 and over in Fayetteville, 58.1 percent are employed, which falls between the two benchmark cities and is below the County, but above both the state and nation. Fayetteville has the second highest percentage of its population not in the labor force, below Opelika (Table 19 and Figure 31).

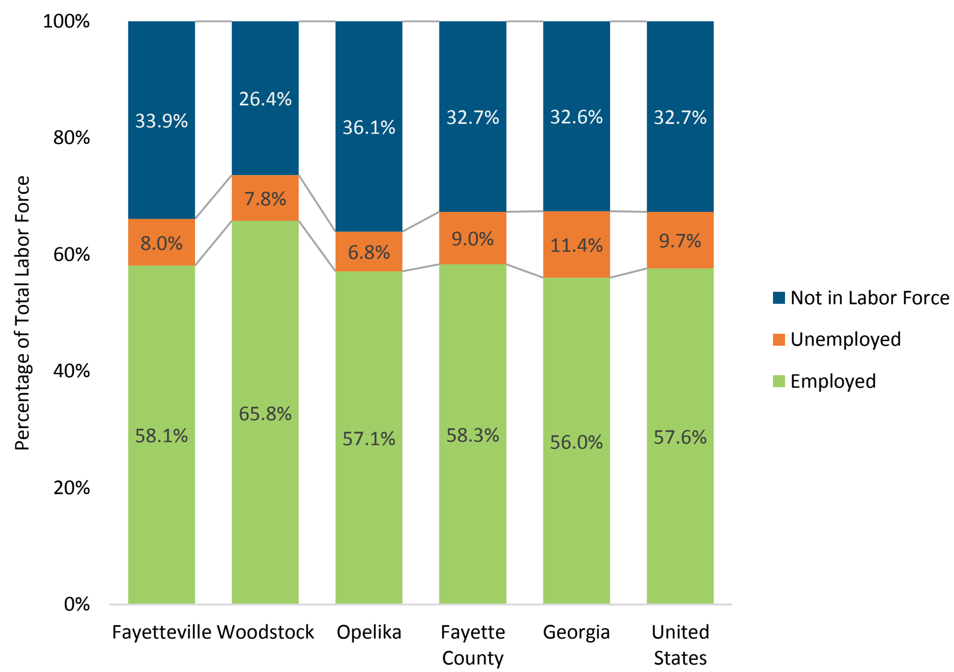
Fayetteville's proportion of families with two income earners (*Married, Husband and Wife in Labor Force)* is 43.3 percent, which is higher than Opelika, the state, and the nation, but lower than Woodstock and the County (Table 20 and Figure 32). Fayetteville has the highest proportion of unmarried males in the labor force at 5.7 percent (*Unmarried Male in Labor Force, No Wife Present*).

Table 19
2009–2013 Five-Year Estimates
Employment Status
(Highest Relative Rates Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Employed	58.1%	65.8%	57.1%	58.3%	56.0%	57.6%
Unemployed	8.0%	7.8%	6.8%	9.0%	11.4%	9.7%
Not in Labor Force	33.9%	26.4%	36.1%	32.7%	32.6%	32.7%

Source: US Census Bureau, Garner Economics

Figure 31
2009–2013 Five-Year Estimates
Employment Status
Population 16+



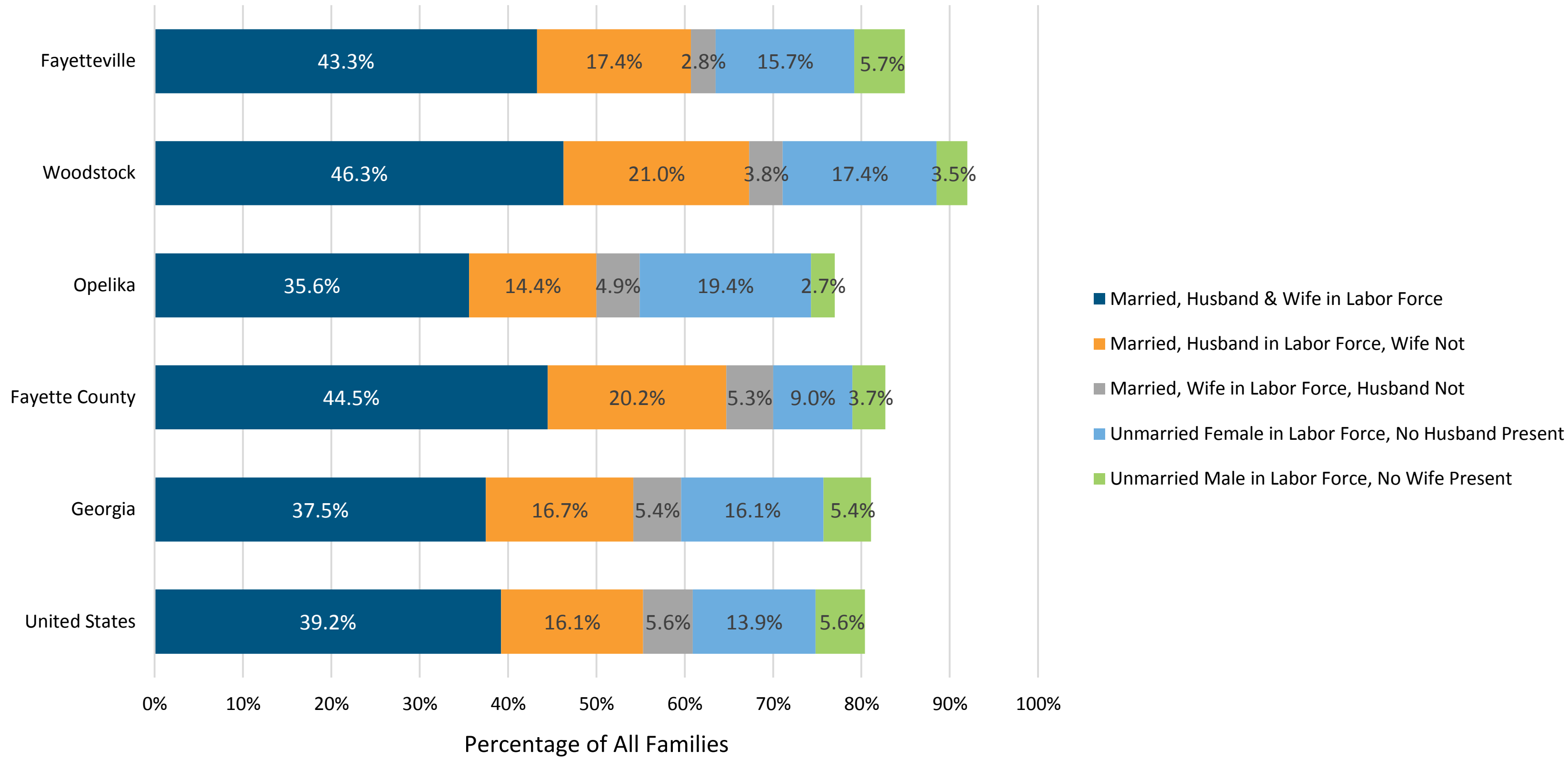
Source: US Census Bureau American Community Survey, Garner Economics

Table 20
2009–2013 Five-Year Estimates
Employment Status
Percentage of All Families
(Highest Relative Rates Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Married-Couple Families						
Married, Husband & Wife in Labor Force	43.3%	46.3%	35.6%	44.5%	37.5%	39.2%
Married, Husband in Labor Force, Wife Not	17.4%	21.0%	14.4%	20.2%	16.7%	16.1%
Married, Wife in Labor Force, Husband Not	2.8%	3.8%	4.9%	5.3%	5.4%	5.6%
Other Families						
Unmarried Female in Labor Force, No Husband Present	15.7%	17.4%	19.4%	9.0%	16.1%	13.9%
Unmarried Male in Labor Force, No Wife Present	5.7%	3.5%	2.7%	3.7%	5.4%	5.6%
Total Families in Labor Force	**84.8%**	**92.0%**	**76.9%**	**82.6%**	**81.2%**	**80.4%**

Source: US Census Bureau American Community Survey, Garner Economics

Figure 32
2009–2013 Five-Year Estimates
Employment Status
Percentage of All Families

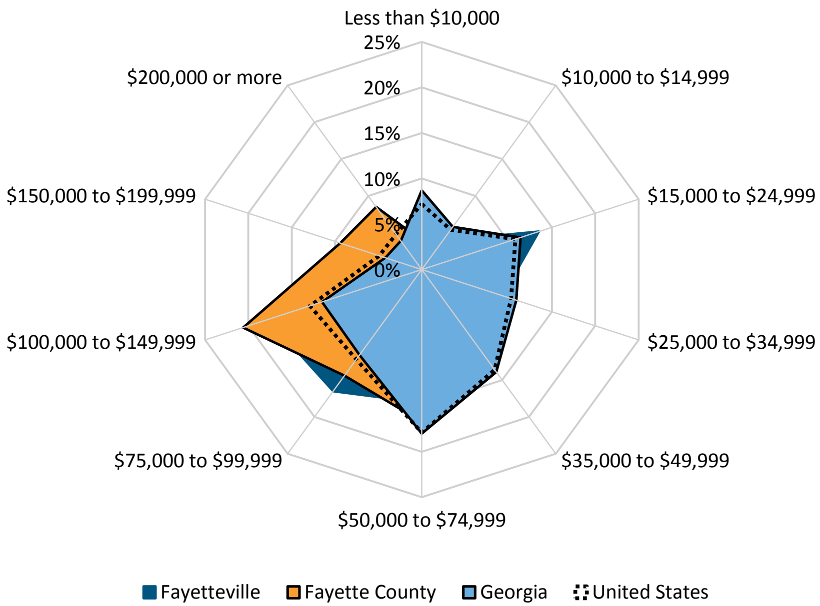


Source: US Census Bureau American Community Survey, Garner Economics

Household Income

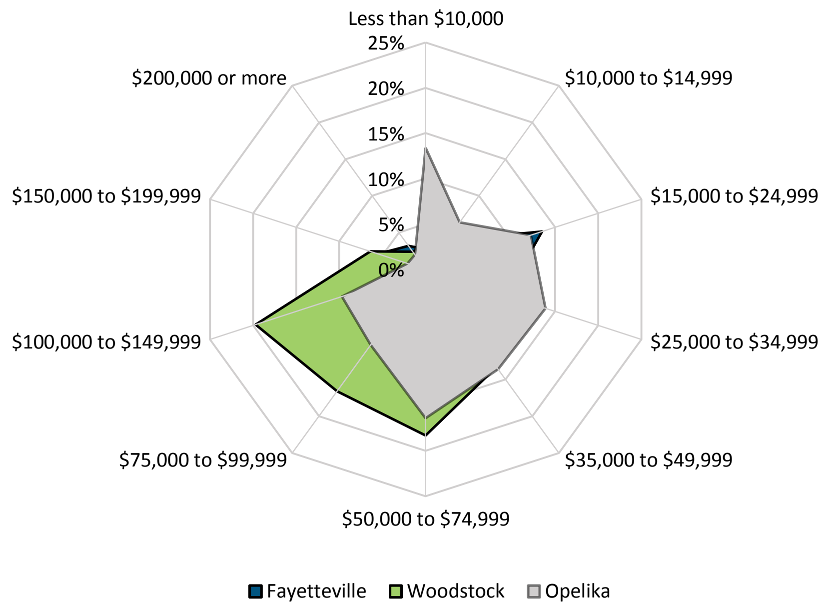
Household income reflects income for residents regardless of where they work, which is different than employment-based wages paid to workers, regardless of where they live. Compared to the nation and the state, Fayetteville has the total highest share of households with incomes in the $15,000 to $24,999 category (Figure 33, Figure 34 and Table 21). Among the benchmark cities, Woodstock has the highest share of households with incomes between $50,000 and $99,999 (34.9 percent). Fayetteville's proportion of those above $100,000 is 26.4 percent, which is below the overall county average of 38.5 percent and Woodstock's average of 28.5 percent.

Figure 33
2009–2013 Five-Year Estimates
Household Income by Percentage of Total



Source: Census Bureau American Community Survey, Garner Economics

Figure 34
2009–2013 Five Year Estimates
Household Income by Percentage of Total



Source: US Census Bureau American Community Survey, Garner Economics

Table 21
2009–2013 Five-Year Estimates
Household Income
By Percentage of Total
(Highest Relative Rates Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Less than $10,000	2.2%	2.7%	13.4%	3.2%	8.7%	7.2%
$10,000 to $14,999	3.9%	3.0%	6.4%	2.7%	5.8%	5.4%
$15,000 to $24,999	13.5%	7.6%	12.2%	6.5%	11.4%	10.8%
$25,000 to $34,999	9.3%	10.2%	13.9%	7.3%	10.9%	10.3%
$35,000 to $49,999	13.5%	13.3%	13.6%	10.7%	13.9%	13.6%
$50,000 to $74,999	14.6%	18.3%	16.4%	16.7%	18.0%	17.9%
$75,000 to $99,999	16.5%	16.6%	10.3%	14.4%	11.6%	12.2%
$100,000 to $149,999	17.7%	19.7%	9.7%	20.6%	11.5%	12.9%
$150,000 to $199,999	5.5%	6.4%	2.1%	9.4%	4.2%	4.9%
$200,000 or more	3.2%	2.4%	2.0%	8.5%	3.9%	4.8%

Source: US Census Bureau American Community Survey, Garner Economics

Major Industry Sector Composition

A comparison of major industry employment provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness. Of 20 major industry categories, Fayetteville, in terms of zip codes 30214 and 30215, has the highest relative percentage in one industry: *Health Care and Social Assistance.* Conversely, Fayetteville had the lowest percentage of employment in six industry categories: *Crop and Animal Production; Mining, Quarrying & Oil & Gas Extraction; Manufacturing; Transportation & Warehousing;* and *Real Estate & Rental & Leasing.* Overall, the largest industry sectors for employment in Fayetteville are: *Health Care and Social Assistance* (19.9 percent), *Government* (18.6 percent), *Retail Trade* (15.5 percent), and *Accommodation & Food Services* (11.2 percent) (Table 22).

A detailed analysis of Fayetteville's industrial and occupational specialization relative to the nation can be found in Chapter 7: Local Specialization, Competitiveness & Growth as well as the Appendices.

Table 22
Fayette 2015 Major Industry Sector Composition
Percentage of Total Employment
(Highest Relative Percentages Shaded)
(Lowest Relative Percentages Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Crop & Animal Production	0.1%	0.2%	0.9%	0.1%	0.8%	1.2%
Mining, Quarrying & Oil & Gas Extraction	0.0%	0.0%	0.0%	0.1%	0.1%	0.6%
Utilities	0.1%	0.0%	0.2%	0.0%	0.4%	0.4%
Construction	7.3%	9.3%	2.1%	7.3%	4.7%	5.4%
Manufacturing	2.9%	5.8%	6.3%	6.4%	8.1%	8.0%
Wholesale Trade	2.3%	4.9%	2.2%	5.1%	4.7%	3.9%
Retail Trade	15.5%	17.9%	12.1%	14.9%	10.6%	10.4%
Transportation & Warehousing	1.3%	1.5%	6.9%	3.4%	4.1%	3.3%
Information	0.6%	1.5%	0.8%	0.7%	2.4%	1.9%
Finance & Insurance	2.8%	4.6%	1.8%	2.5%	3.9%	4.0%
Real Estate & Rental & Leasing	1.0%	2.1%	1.2%	1.2%	1.5%	1.7%
Professional, Scientific & Technical Services	3.9%	8.0%	2.1%	4.7%	6.4%	6.3%
Management of Companies & Enterprises	0.2%	0.1%	0.1%	0.6%	1.4%	1.4%
Administrative & Support & Waste Management	2.3%	6.2%	16.7%	3.1%	7.2%	6.3%
Educational Services	1.5%	2.3%	0.2%	1.6%	2.0%	2.5%
Health Care & Social Assistance	19.9%	10.0%	7.3%	14.0%	10.1%	12.4%
Arts, Entertainment & Recreation	1.4%	3.3%	0.6%	1.9%	1.3%	1.7%
Accommodation & Food Services	11.2%	12.8%	9.6%	12.7%	8.7%	8.4%
Other Services (except Public Administration)	6.6%	6.2%	3.8%	7.8%	4.4%	4.8%
Government	18.6%	2.6%	25.0%	11.4%	16.8%	15.5%

Source: EMSI Q2 2015 Data Set, Garner Economics

Cost of Living

The 2015 composite cost-of-living index for Fayetteville is 93.4 (the national average is set at 100). Compared to Opelika, the other benchmark city available in this data set, Fayetteville-Fayette County has a low cost-of-living index. However, the *Health Care* index is higher than Opelika and the national average (Table 23 and Figure 35).

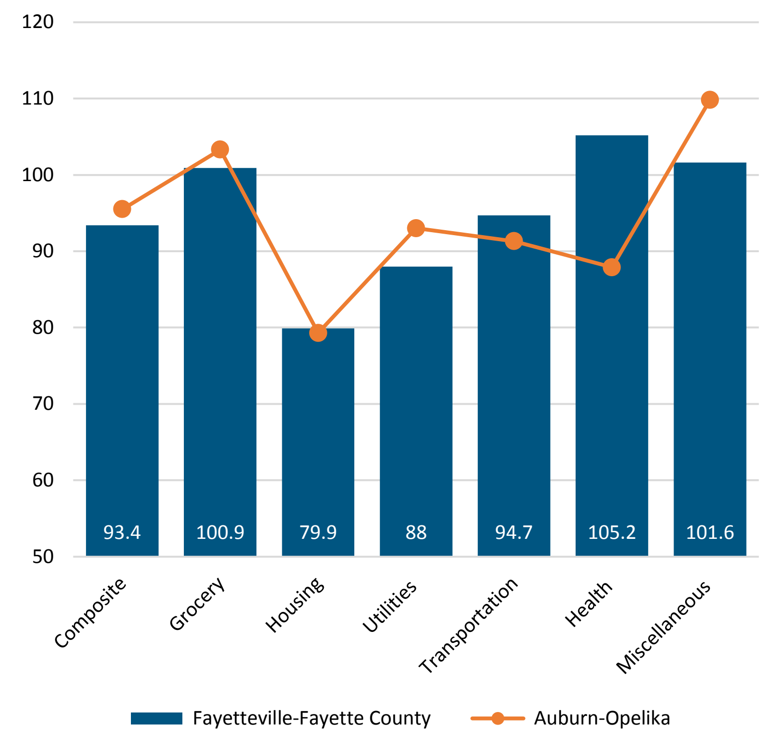
Table 23
2015 Cost-of-Living Index

	Composite	Grocery	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Fayetteville-Fayette County	93.4	100.9	79.9	88.0	94.7	105.2	101.6
Auburn-Opelika	95.5	103.3	79.3	93.0	91.3	87.9	109.8

*Woodstock–data not available.

Source: Council for Community and Economic Research 2014 Q3–2015 Q3, Garner Economics

Figure *35*
2015 Fayetteville Cost-of-Living Index



Source: Council for Community and Economic Research 2014 Q3–2015 Q3, Garner Economics

Broadband

According to the National Telecommunications and Information Administration, households in Fayetteville have the greatest access to DSL compared to the benchmark cities, the County, state, and nation, with 98.5% of households having access (Table 24). Small businesses in Fayetteville have median download speeds slower than the County, state, and nation and upload speeds in-line with Woodstock, the state, and nation.

Table 24
2014 Broadband Availability & Speed
(Highest Relative Percentages Shaded)

	Fayetteville	Woodstock	Opelika	Fayette County	Georgia	United States
Availability						
DSL	98.5%	95.0%	91.2%	98.0%	92.8%	90.0%
Fiber	11.6%	16.3%	0.6%	12.7%	16.9%	25.4%
Cable	99.4%	97.9%	98.3%	97.3%	86.4%	88.8%
Wireless	100.0%	100.0%	100.0%	100.0%	99.9%	99.4%
Two or More Wireline Providers	99.4%	99.8%	90.3%	99.1%	87.3%	88.4%
Speed–Mbps*						
Medium & Large Businesses						
Median Download	NA**	2.8	37.2^	1.6	8.3	8.9
Median Upload	NA**	1.8	34.0^	1.5	3.4	4.2
Small Businesses						
Median Download	1.9	1	1.3^	4	3.3	4.4
Median Upload	1.2	1.3	0.2^	0.4	1.3	1.3

**Mbps–Megabytes per second*
***No data available*
^Only one cumulative test
Sources: National Telecommunications and Information Administration, Garner Economics

Chapter 6: Retail Leakage Analysis

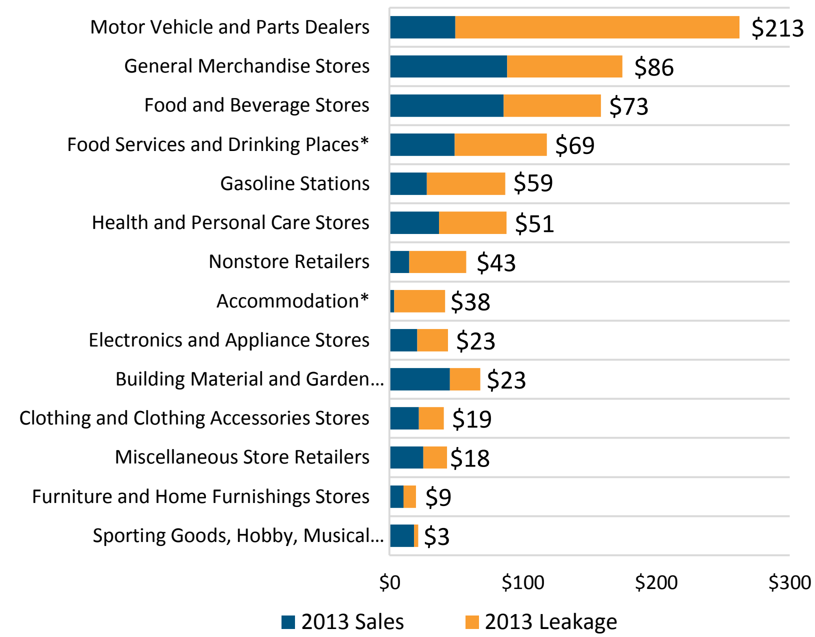
To determine specific industries with retail potential, a retail leakage analysis was conducted. Retail leakage represents the dollar amount that shoppers from Fayetteville spent outside of the region. In other words, it is the dollars that "leaked" out of the economy. If leakage is a high proportion of Fayetteville residents' total dollars spent in a particular trade area, the community could potentially support more businesses in that area. Zip code data for 30214 and 30215 were used to measure retail leakage in Fayetteville.

Overall, Fayetteville's average percentage of retail leakage is 59.4, indicating that shoppers from Fayetteville spend less than half of their disposable income in the City (40.6 percent). A review of each of the 14 major retail categories in Fayetteville shows seven industries with 50 percent or higher leakage:

- Accommodation*
- Motor Vehicles & Parts Dealers
- Nonstore Retailers
- Gasoline Stations
- Food Service & Drinking Places
- Health & Personal Care Stores
- Electronic & Appliance Stores

The largest dollar leakage is in the category Accommodation* with 91.8 percent leakage. The highest actual retail gap for Fayetteville is the category of *Motor Vehicle and Parts Dealers,* which leaked 81.2 percent of sales or $212.9 million out of a total of $262.3 million sales (Figure 36 and Table 25). The other industries with the largest dollar leakage are *General Merchandise Store* with $86.2 million leakage and *Food & Beverage Stores* with $73 million leakage.

Figure 36
Fayetteville Residents (Zip codes 30214 and 30215)
2013 Sales in the Region and Leakage (in Millions)



Values Indicate Leakage

** Industries belonging to NAICS 72: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.*

Source: EMSI, Garner Economics

Table 25
Fayetteville (Zip codes 30214 and 30215)
2013 Retail Demand and Leakage

NAICS Code	Retail Category	Consumer Demand in Fayetteville	Leakage Outside Fayetteville	% Leakage
441	**Motor Vehicle & Parts Dealers**	**$262,314,745**	**$212,944,357**	**81.2%**
4411	Automobile Dealers	$225,270,732	$189,179,824	84.0%
4412	Other Motor Vehicle Dealers	$13,017,235	$11,273,360	86.6%
4413	Automotive Parts, Accessories & Tire Stores	$24,026,778	$12,491,173	52.0%
442	**Furniture & Home Furnishings Stores**	**$19,871,222**	**$9,405,060**	**47.3%**
4421	Furniture Stores	$10,364,949	$4,544,052	43.8%
4422	Home Furnishings Stores	$9,506,273	$4,861,008	51.1%
443	**Electronics & Appliance Stores**	**$43,758,932**	**$22,993,744**	**52.5%**
444	**Building Material & Garden Equipment & Supplies Dealers**	**$67,988,925**	**$22,817,708**	**33.6%**
4441	Building Material & Supplies Dealers	$58,432,296	$17,154,235	29.4%
4442	Lawn & Garden Equipment & Supplies Stores	$9,556,629	$5,663,473	59.3%
445	**Food & Beverage Stores**	**$158,516,494**	**$73,047,876**	**46.1%**
4451	Grocery Stores	$139,991,074	$57,276,828	40.9%
4452	Specialty Food Stores	$10,282,928	$7,874,507	76.6%
4453	Beer, Wine & Liquor Stores	$8,242,492	$7,896,541	95.8%
446	**Health & Personal Care Stores**	**$87,804,376**	**$50,781,028**	**57.8%**
447	**Gasoline Stations**	**$86,676,698**	**$58,737,932**	**67.8%**
448	**Clothing & Clothing Accessories Stores**	**$40,755,641**	**$18,719,546**	**45.9%**
4481	Clothing Stores	$28,243,533	$13,390,194	47.4%
4482	Shoe Stores	$4,908,105	$3,613,442	73.6%
451	**Sporting Goods, Hobby, Musical Instrument & Book Stores**	**$21,526,517**	**$3,067,350**	**14.2%**
4511	Sporting Goods, Hobby & Musical Instrument Stores	$17,693,667	$211,420	1.2%
4512	Book Stores & News Dealers	$3,832,850	$2,855,930	74.5%
452	**General Merchandise Stores**	**$174,531,362**	**$86,269,294**	**49.4%**
4521	Department Stores	$56,043,781	$38,694,887	69.0%
4529	Other General Merchandise Stores	$118,487,581	$47,574,406	40.2%

NAICS Code	Retail Category	Consumer Demand in Fayetteville	Leakage Outside Fayetteville	% Leakage
453	**Miscellaneous Store Retailers**	**$43,216,009**	**$17,853,068**	**41.3%**
4531	Florists	$3,046,264	$431,514	14.2%
4532	Office Supplies, Stationery & Gift Stores	$13,154,572	$4,481,819	34.1%
4539	Other Miscellaneous Store Retailers	$20,292,045	$7,729,802	38.1%
454	**Nonstore Retailers**	**$57,603,975**	**$42,909,780**	**74.5%**
4541	Electronic Shopping & Mail-Order Houses	$32,209,468	$30,865,746	95.8%
4542	Vending Machine Operators	$2,513,139	$846,139	33.7%
4543	Direct Selling Establishments	$22,881,369	$11,197,895	48.9%
721	**Accommodation***	**$41,632,364**	**$38,232,827**	**91.8%**
7211	Traveler Accommodation*	$39,325,353	$37,033,073	94.2%
7212	RV (Recreational Vehicle) Parks & Recreational Camps*	$1,383,682	$807,448	58.4%
7213	Rooming & Boarding Houses*	$923,330	$392,307	42.5%
722	**Food Services & Drinking Places***	**$117,955,931**	**$69,147,823**	**58.6%**
7223	Special Food Services*	$7,121,501	$5,450,678	76.5%
7224	Drinking Places (Alcoholic Beverages)*	$2,726,116	$6,484	0.2%
7225	Restaurants & Other Eating Places*	$108,108,314	$63,690,660	58.9%

** Industries belonging to NAICS 72: Accommodation and Food Services have been included as a convenience. Technically, these are not retail industries.*

Source: EMSI, Garner Economics

Chapter 7: Local Specialization, Competitiveness & Growth

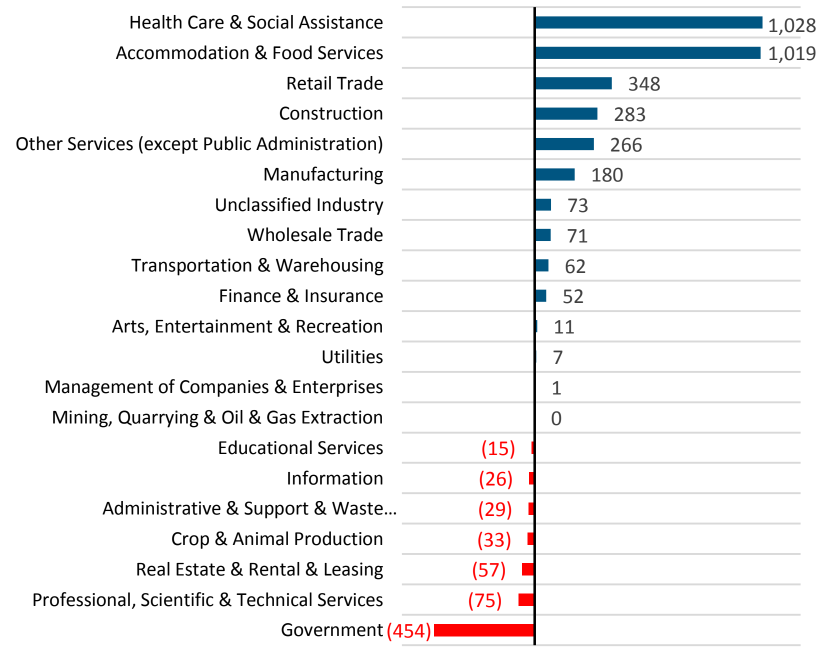
The following section provides a more detailed and in-depth assessment of the Fayetteville area economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities.

The two main areas of analysis are: **major industries** and **occupational groups**. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings. Zip code data for 30214 and 30215 were used to measure major industries and occupational groups in Fayetteville.

Major Industry Sector Change

Since 2010, the largest absolute industry jobs growth in Fayetteville came from *Health Care & Social Assistance* (1,028 jobs or 27 percent) and *Accommodation & Food Services* (1,019 jobs or 61 percent) (Figure 37 and Table 26). There were job losses in *Government* (-454 jobs or 9 percent); *Professional, Scientific & Technical Services* (-75 jobs or 7 percent); *Real Estate & Rental & Leasing* (-57 jobs or 20 percent); and *Crop & Animal Production* (-33 jobs or 56 percent).

Figure 37
Fayetteville (Zip codes 30214 and 30215)
Employment Change by Major Industry
2010-2015



Source: EMSI 2nd Quarter 2015, Garner Economics

Chapter Data

Table 26
Fayetteville (Zip codes 30214 and 30215)
Employment Change by Major Industry
2010–2015
Ranked by Absolute Change

Major Industry Sector	2015 Jobs	Employment Change	
		#	%
Health Care & Social Assistance	4,771	1,028	27%
Accommodation & Food Services	2,689	1,019	61%
Retail Trade	3,706	348	10%
Construction	1,760	283	19%
Other Services (except Public Administration)	1,575	266	20%
Manufacturing	696	180	35%
Wholesale Trade	546	71	15%
Transportation & Warehousing	316	62	24%
Finance & Insurance	674	52	8%
Arts, Entertainment & Recreation	328	11	3%
Utilities	12	7	1%
Management of Companies & Enterprises	38	1	3%
Mining, Quarrying & Oil & Gas Extraction	0	0	0%
Educational Services	368	(15)	(4%)
Information	154	(26)	(14%)
Administrative & Support & Waste Management & Remediation Services	559	(29)	(5%)
Crop & Animal Production	26	(33)	(56%)
Real Estate & Rental & Leasing	230	(57)	(20%)
Professional, Scientific & Technical Services	941	(75)	(7%)
Government	4,455	(454)	(9%)

Source: EMSI 2nd Quarter 2015, Garner Economics

Industry Earnings

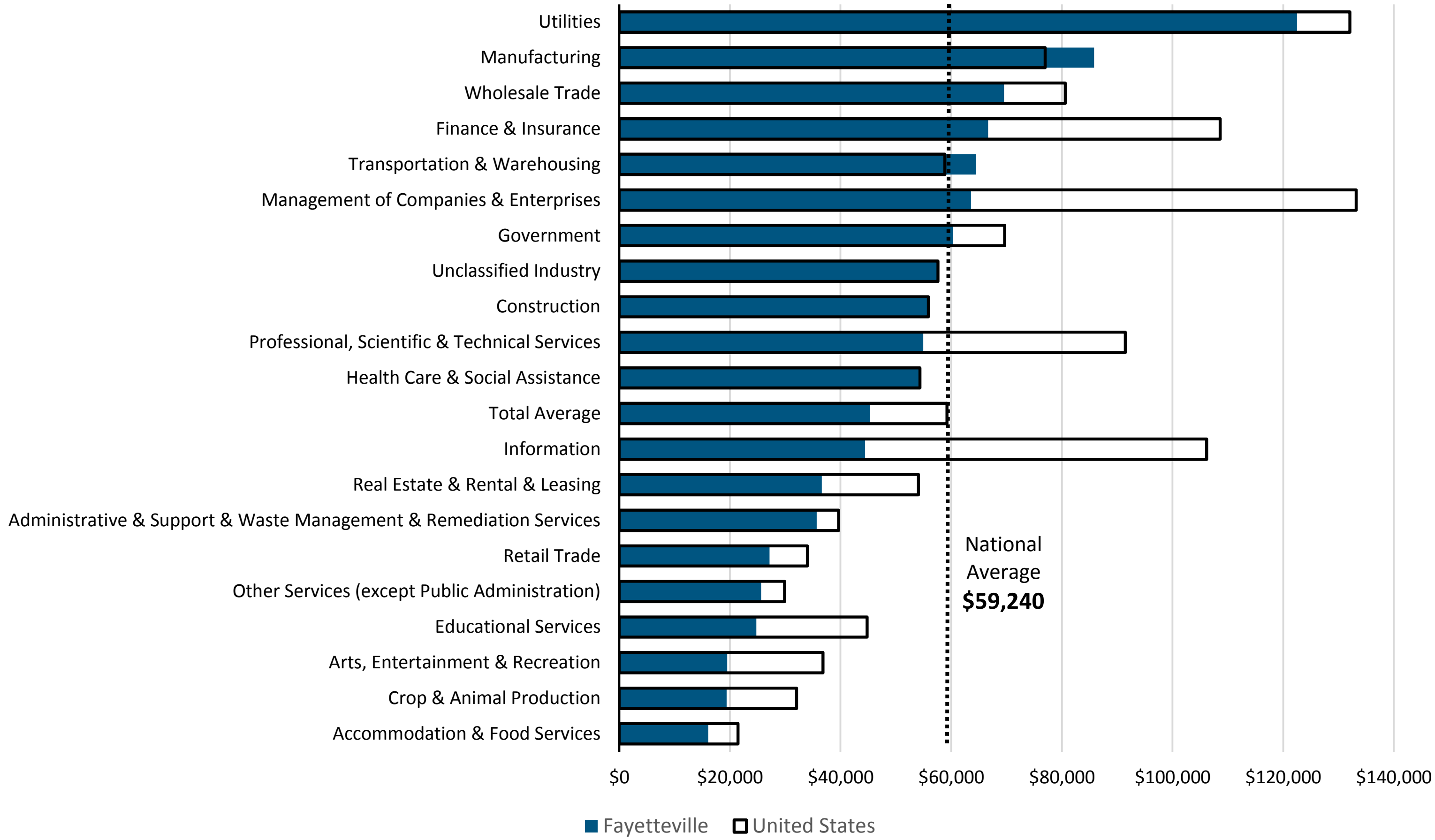
A comparison of Fayetteville's average industry earnings to national averages may offer insights into areas of unique expertise or cost-saving opportunities. Industrial average earnings in Fayetteville are above the national same-industry average in two major sectors: *Manufacturing* (10.3 percent higher) and *Transportation & Warehousing* (8.8 percent higher) (Table 27, Figure 38). This section reflects earnings, which differ slightly from wages, in that they reflect employer-paid supplements.

Table 27
Fayetteville (Zip codes 30214 and 30215)
2015 Average Annual Industry Earnings Comparison
Earnings above the national rate in green

Major Industry Sector	Fayetteville	United States	Percent Difference
Utilities	$122,487	$132,070	-7.8%
Manufacturing	$85,813	$76,958	10.3%
Wholesale Trade	$69,528	$80,626	-16.0%
Finance & Insurance	$66,655	$108,648	-63.0%
Transportation & Warehousing	$64,503	$58,839	8.8%
Management of Companies & Enterprises	$63,587	$133,177	-109.4%
Government	$60,308	$69,657	-15.5%
Construction	$55,852	$55,900	-0.1%
Professional, Scientific & Technical Services	$54,958	$91,469	-66.4%
Health Care & Social Assistance	$54,143	$54,354	-0.4%
All Industry Average	**$45,342**	**$59,240**	**-30.7%**
Information	$44,432	$106,178	-139.0%
Real Estate & Rental & Leasing	$36,590	$54,099	-47.9%
Administrative & Support & Waste Management & Remediation Services	$35,704	$39,676	-11.1%
Retail Trade	$27,192	$34,013	-25.1%
Other Services (except Public Administration)	$25,642	$29,884	-16.5%
Educational Services	$24,782	$44,819	-80.9%
Arts, Entertainment & Recreation	$19,518	$36,853	-88.8%
Crop & Animal Production	$19,411	$32,073	-65.2%
Accommodation & Food Services	$16,095	$21,480	-33.5%

Source: EMSI, Garner Economics

Figure 38
Fayetteville (Zip codes 30214 and 30215)
2015 Average Industry Earnings Comparison

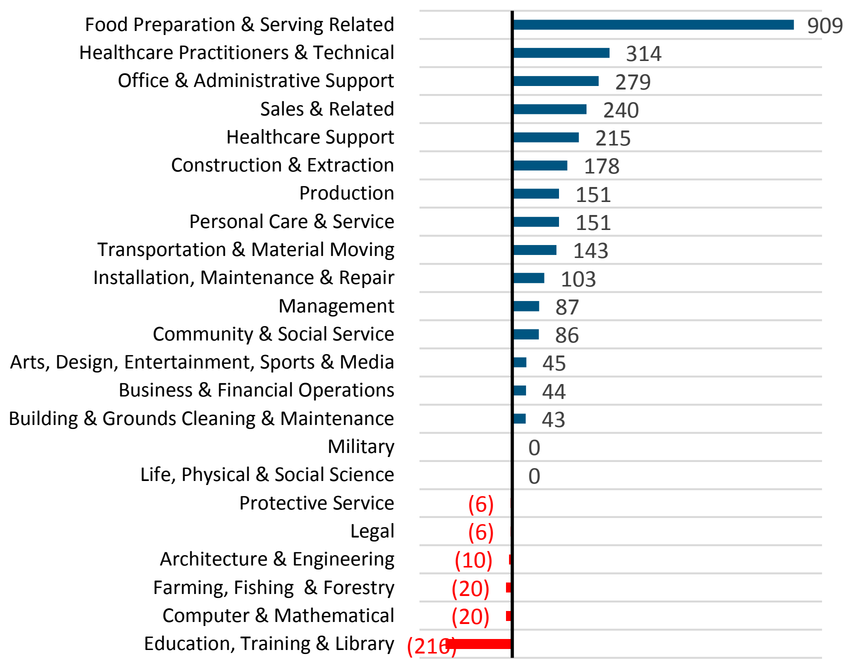


Source: EMSI, Garner Economics

Major Occupational Change

Over the last five years, the single largest absolute occupational gains in Fayetteville came from *Food Preparation & Serving Related,* up 909 jobs or 48 percent (Figure 39 and Table 28). The greatest job losses were in the occupational areas of *Education, Training & Library* (-216 jobs or 8 percent).

Figure 39
Fayetteville (Zip codes 30214 and 30215)
Employment Change by Major Occupational Groups
2010–2015



Source: EMSI, Garner Economics

Table 28
Fayetteville (Zip codes 30214 and 30215)
Employment Change by Major Occupational Groups
2010–2015
Ranked by Absolute Change

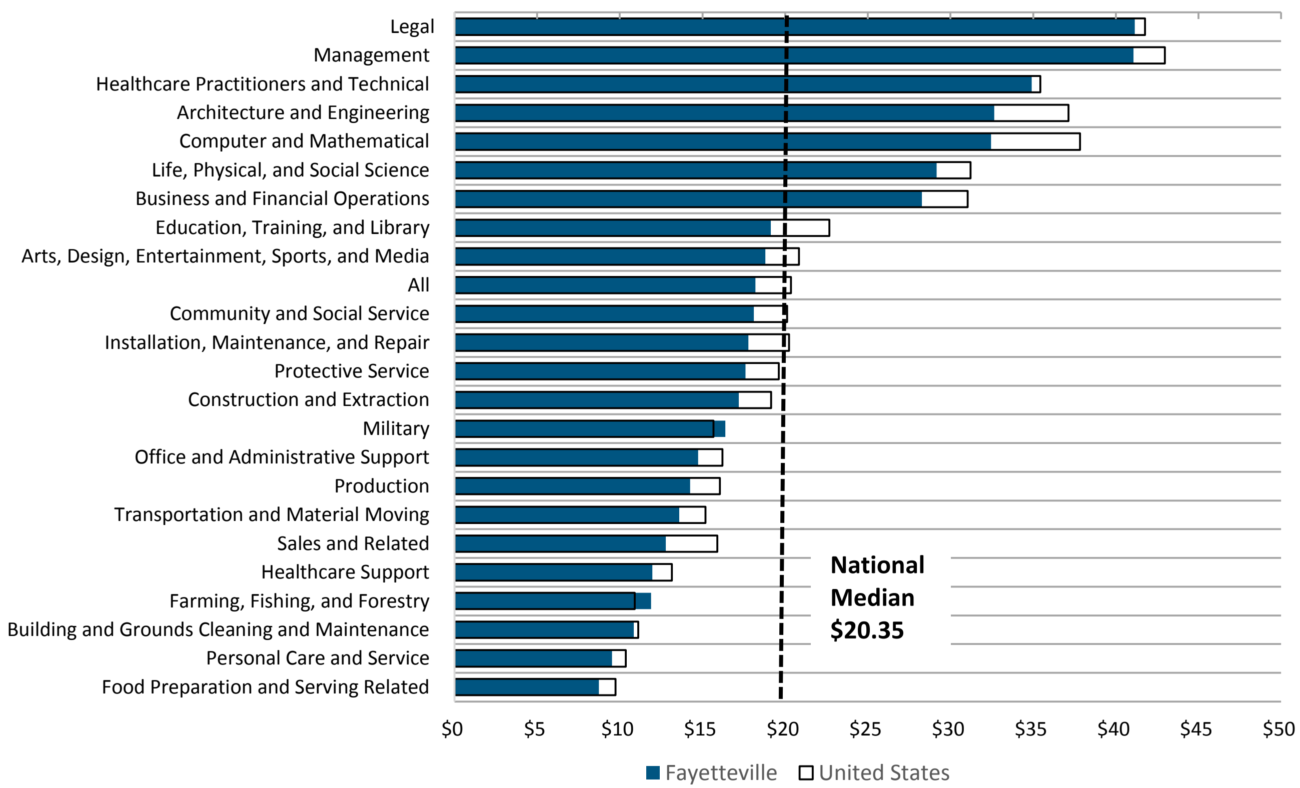
Major Occupational Group	2015 Jobs	Employment Change	
		#	%
Food Preparation & Serving Related	2,802	909	48%
Healthcare Practitioners & Technical	1,989	314	19%
Office & Administrative Support	3,162	279	10%
Sales & Related	2,899	240	9%
Healthcare Support	914	215	31%
Construction & Extraction	1,233	178	17%
Personal Care & Service	972	151	18%
Production	684	151	28%
Transportation & Material Moving	1,130	143	14%
Installation, Maintenance & Repair	779	103	15%
Management	1,174	87	8%
Community & Social Service	517	86	20%
Arts, Design, Entertainment, Sports & Media	393	45	13%
Business & Financial Operations	869	44	5%
Building & Grounds Cleaning & Maintenance	744	43	6%
Life, Physical & Social Science	79	0	0%
Military	179	0	0%
Legal	114	(6)	(5%)
Protective Service	369	(6)	(2%)
Architecture & Engineering	161	(10)	(6%)
Computer & Mathematical	328	(20)	(6%)
Farming, Fishing & Forestry	22	(20)	(48%)
Education, Training & Library	2,456	(216)	(8%)

Source: EMSI, Garner Economics

Occupational Earnings

A comparison of the same-occupation median hourly earnings in Fayetteville to the national medians may offer insights into areas of unique expertise or cost-saving opportunities. Fayetteville's median hourly earnings were above the nation for *Military* and *Farming, Fishing & Forestry*. However, seven occupational sectors were above the national hourly average of $20.35: *Legal; Management; Healthcare Practitioners & Technical; Architecture & Engineering; Computer & Mathematical; Life, Physical & Social Science;* and *Business & Finance Operations* (Figure 40, Table 29).

Figure 40
Fayetteville (Zip codes 30214 and 30215)
2015 Median Hourly Occupational Earnings Comparison



Source: EMSI 2nd Quarter 2015, Garner Economics

Table 29
Fayetteville (Zip codes 30214 and 30215)
2015 Median Hourly Occupational Earnings Comparison
Earnings above national rate in green

Major Occupational Group	Fayetteville	United States	Percent Difference
Legal	$41.15	$41.77	-1.5%
Management	$41.06	$42.97	-4.7%
Healthcare Practitioners and Technical	$34.92	$35.44	-1.5%
Architecture and Engineering	$32.64	$37.13	-13.8%
Computer and Mathematical	$32.45	$37.83	-16.6%
Life, Physical, and Social Science	$29.16	$31.22	-7.0%
Business and Financial Operations	$28.27	$31.04	-9.8%
Education, Training, and Library	$19.14	$22.67	-18.5%
Arts, Design, Entertainment, Sports, and Media	$18.80	$20.85	-10.9%
All Occupations	**$18.21**	**$20.35**	**-11.7%**
Community and Social Service	$18.11	$20.13	-11.1%
Installation, Maintenance, and Repair	$17.77	$20.23	-13.8%
Protective Service	$17.60	$19.61	-11.4%
Construction and Extraction	$17.20	$19.14	-11.3%
Military	$16.39	$15.67	4.4%
Office and Administrative Support	$14.75	$16.21	-10.0%
Production	$14.26	$16.05	-12.5%
Transportation and Material Moving	$13.59	$15.19	-11.7%
Sales and Related	$12.78	$15.89	-24.4%
Healthcare Support	$11.97	$13.15	-9.8%
Farming, Fishing, and Forestry	$11.89	$10.91	8.2%
Building and Grounds Cleaning/Maintenance	$10.85	$11.11	-2.4%
Personal Care and Service	$9.53	$10.36	-8.7%

Source: EMSI 2nd Quarter 2015, Garner Economics

The following assessment tools include a series of bubble or scatter charts and tables. Axis and quadrant labels should be read as only general guides resulting from purely quantitative analysis, not definitive conclusions. Each chart and table is meant as only one piece of a multiple-part analysis. To assist the reader in interpreting the bubble charts, each axis and quadrant is labeled with broad descriptives.

Chart axis definitions:

- **Specialization**: measured using location quotient (LQ).[1] Reflects the level of relative concentration of a particular occupation or industry in Fayetteville to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth or decline attributed to a particular industry nationwide. For example, if hospital employment grew by five percent nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth or decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

- **At-Risk:** Locally specialized and recent local job losses.
- **Declining:** Not locally specialized and recent local job losses.
- **Competitive:** Locally specialized and recent local job gains.
- **Emerging:** Not locally specialized and recent local job gains.

[1] To measure local specialization, location quotients (LQs) for each occupation or industry are derived. LQs are ratios of an area's distribution of employment for a specific occupation or industry compared to a reference or base area's distribution. In this analysis, the reference area is the United States. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area and implies local specialization. LQs are calculated by first dividing local industry employment by the all-industry total of local employment. Second, reference area industry employment is divided by the all-industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many industry sectors, there exists interconnectedness among suppliers, occupations, and associated supporting institutions.

Observations: Five industry sectors in Fayetteville have a level of local specialization above 1.0 and have grown within the last five years: *Health Care & Social Assistance, Accommodation & Food Services, Retail Trade, Construction, and Other Services* (Table 30 and Figure 41). The single industry at risk is *Government*, which has a strong local specialization at 1.2 but experienced a loss of 454 jobs over the past five years.

Table 30
Fayetteville (Zip codes 30214 and 30215)
Industry Specialization & Growth

Industry Sector	5-Year Job Change	Location Quotient	2015 Jobs
Competitive			
Health Care & Social Assistance	1,028	1.60	4,771
Accommodation & Food Services	1,019	1.33	2,689
Retail Trade	348	1.49	3,706
Construction	283	1.37	1,760
Other Services	266	1.38	1,575
Emerging			
Manufacturing	180	0.36	696
Wholesale Trade	71	0.59	546
Transportation & Warehousing	62	0.40	316
Finance & Insurance	52	0.70	674
Arts, Entertainment & Recreation	11	0.83	328
Utilities	7	0.14	12
Management of Companies & Enterprises	1	0.11	38
At-Risk			
Government	(454)	1.20	4,455
Declining			
Educational Services	(15)	0.61	368
Information*	(26)	0.34	154
Administrative & Support & Waste Management & Remediation Services	(29)	0.37	559
Crop & Animal Production	(33)	0.09	26
Real Estate & Rental & Leasing	(57)	0.58	230
Professional, Scientific & Technical Services	(75)	0.62	941

Source: EMSI, Garner Economics
**See Motion Picture & Video Production on next page*

Motion Picture and Video Production

The newly launched Pinewood Studios in Fayetteville provides a substantial opportunity for the City. With an employment multiplier of 1.65 for the *Motion Picture and Video Production* sector in the Atlanta MSA, if employment increases by 100, the local economy can expect to gain 65 additional jobs for a total of 165 new jobs. Further, with an average annual salary of $51,720, which is the industry average for the Atlanta MSA, the local economy will gain just over $8.5 million in additional earnings. However, with a NAICS code of 51211, *Motion Picture and Video Production* falls into the Information sector, which is categorized as *Declining* in Fayetteville.

NAICS	Description	NAICS	Description
51111	Newspaper Publishers	51229	Other Sound Recording Industries
51112	Periodical Publishers	51511	Radio Broadcasting
51113	Book Publishers	51512	Television Broadcasting
51114	Directory & Mailing List Publishers	51521	Cable & Other Subscription Programming
51119	Other Publishers	51711	Wired Telecommunications Carriers
51121	Software Publishers	51721	Wireless Telecommunications Carriers (except Satellite)
51211	Motion Picture & Video Production	51741	Satellite Telecommunications
51212	Motion Picture & Video Distribution	51791	Other Telecommunications
51213	Motion Picture & Video Exhibition	51821	Data Processing, Hosting & Related Services
51219	Postproduction Services & Other Motion Picture & Video Industries	51911	News Syndicates
51221	Record Production	51912	Libraries & Archives
51222	Integrated Record Production/Distribution	51913	Internet Publishing & Broadcasting & Web Search Portals
51223	Music Publishers	51919	All Other Information Services
51224	Sound Recording Studios		

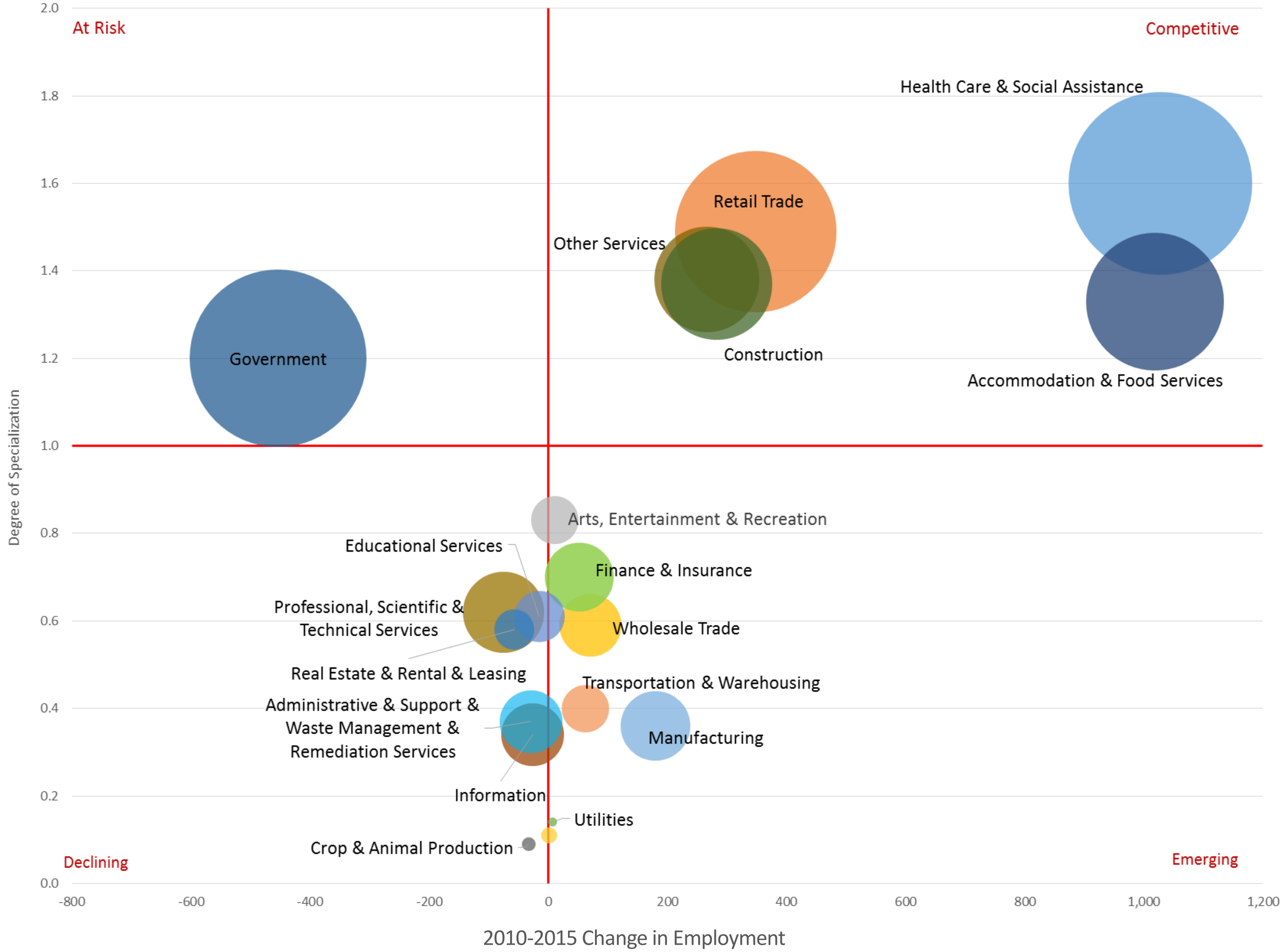
A better representation of Fayetteville's *Motion Picture and Production industry* is captured by examining that of larger local geographies. Georgia and the Atlanta MSA have an *Emerging* film industry (Table 31).

Table 31
Georgia and Atlanta MSA Industry Specialization & Growth

Location	Industry Sector	5-Year Job Change	Location Quotient	2015 Jobs
Emerging				
Georgia	Motion Picture & Video Production	1,430	0.63	4,708
Atlanta MSA	Motion Picture & Video Production	863	0.67	2,850

Source: EMSI 2nd Quarter 2015. Garner Economics

Figure 41
Fayetteville (Zip codes 30214 and 30215)
Industry Specialization & Growth



Size of the bubble represents total employment
Source: EMSI, Garner Economics

Major Industry Competitiveness

The competitiveness screen seeks to reveal local competitive advantages (i.e., unique growth beyond predicted industry trends).

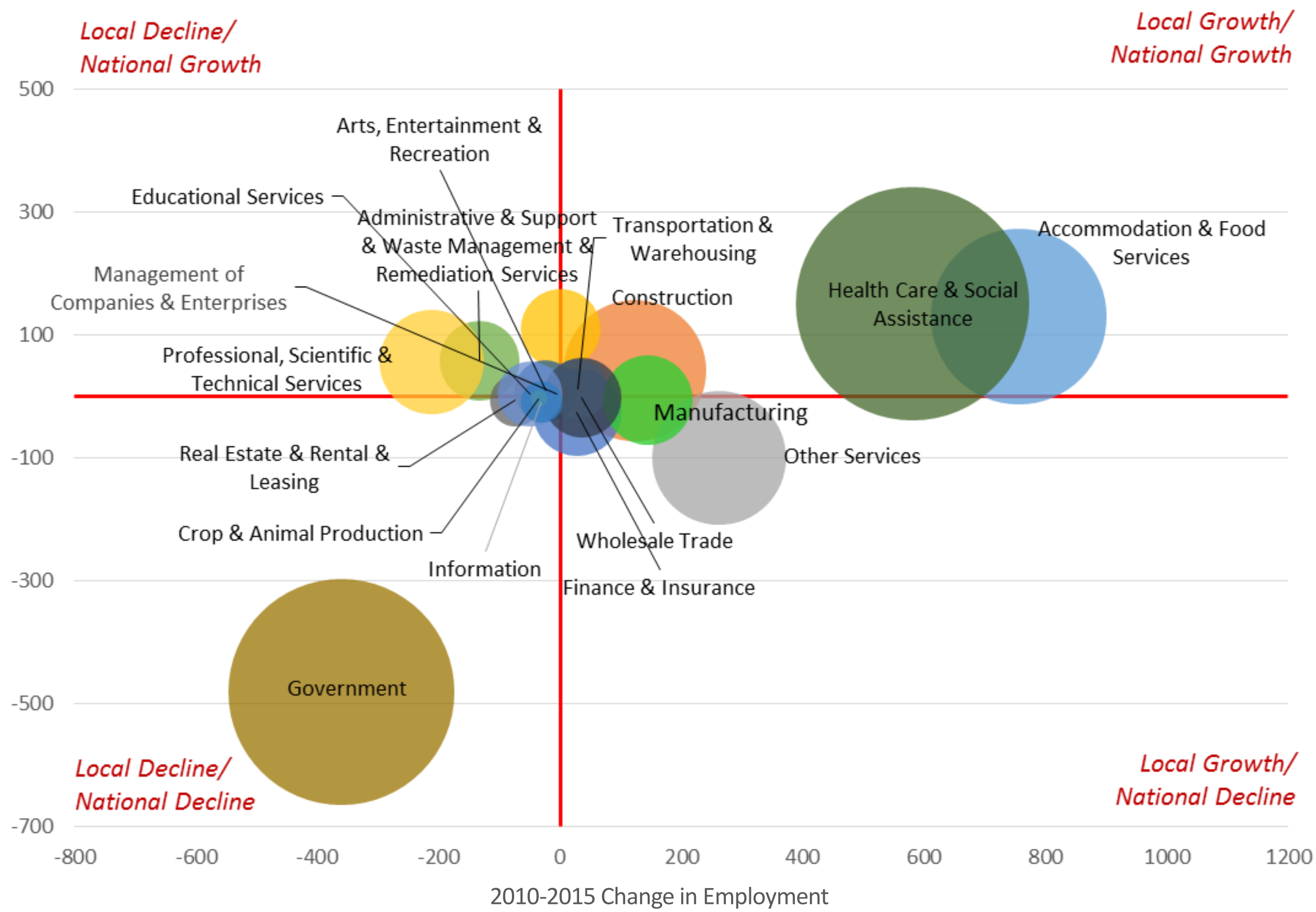
Observations: By this measure, four main industry sectors with strong local competitive effects are *Accommodation & Food Services, Health Care & Social Assistance, Construction,* and *Transportation & Warehousing* (Table 31 and Figure 42). Fayetteville's least competitive sectors are *Crop & Animal Production, Real Estate & Rental & Leasing, Information,* and *Government.*

Table 31
Fayetteville (Zip codes 30214 and 30215)
Industry Relative Components of Growth, 2010–2015

Industry Sector	Local Competitive Effect	Industry Effect	2015 Jobs
Local Growth & National Growth			
Accommodation & Food Services	756	131	2,689
Health Care & Social Assistance	581	151	4,771
Construction	123	43	1,760
Transportation & Warehousing	30	12	316
Local Growth & National Decline			
Other Services (except Public Administration)	262	(100)	1,575
Manufacturing	144	(5)	696
Retail Trade	111	(29)	3,706
Wholesale Trade	36	(1)	546
Finance & Insurance	28	(25)	674
Utilities	7	(0)	12
Local Decline & National Growth			
Administrative & Support & Waste Management & Remediation Services	(133)	58	559
Professional, Scientific & Technical Services	(212)	57	941
Arts, Entertainment & Recreation	(24)	10	328
Educational Services	(49)	4	368
Management of Companies & Enterprises	(6)	4	38
Local Decline & National Decline			
Crop & Animal Production	(35)	(3)	26
Real Estate & Rental & Leasing	(74)	(6)	230
Information	(31)	(9)	154
Government	(360)	(481)	4,455

Source: EMSI 2nd Quarter 2015, Garner Economics

Figure 42
Fayetteville (Zip codes 30214 and 30215)
Industry Relative Components of Growth, 2010–2015



Size of the bubble represents total employment
Source: EMSI, Garner Economics

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors.

Observations: The occupational groups of *Food Preparation & Serving Related, Healthcare Practitioners & Technical, Sales & Related, Healthcare Support, Construction & Extraction, Personal Care & Service,* and *Community & Social Service* each experienced growth while exhibiting local specialization (Table 32 and Figure 43). Eight occupations are *Emerging* and three—*Military; Life, Physical & Social Science;* and *Education, Training & Library*—are *At-Risk*. Five of the occupational groups are: *Protective Service; Legal; Computer & Mathematical; Architecture & Engineering;* and *Farming, Fishing & Forestry.*

Table 32
Fayetteville (Zip codes 30214 and 30215)
Occupational Specialization & Growth, 2010–2015

Major Occupational Group	Five-Year Change	Location Quotient	2015 Jobs
Competitive			
Food Preparation & Serving Related	909	1.42	2,802
Healthcare Practitioners & Technical	314	1.55	1,989
Sales & Related	240	1.17	2,899
Healthcare Support	215	1.37	914
Construction & Extraction	178	1.13	1,233
Personal Care & Service	151	1.03	972
Community & Social Service	86	1.35	517
Emerging			
Office & Administrative Support	279	0.87	3,162
Production	151	0.47	684
Transportation & Material Moving	143	0.73	1,130
Installation, Maintenance & Repair	103	0.85	779
Management	87	0.92	1,174
Arts, Design, Entertainment, Sports & Media	45	0.94	393
Business & Financial Operations	44	0.74	869
Building & Grounds Cleaning & Maintenance	43	0.82	744
At-Risk			
Military	0	0.57	179
Life, Physical & Social Science	0	0.40	79
Education, Training & Library	(216)	1.80	2,456
Declining			
Protective Service	(6)	0.68	369
Legal	(6)	0.57	114
Architecture & Engineering	(10)	0.41	161
Farming, Fishing & Forestry	(20)	0.12	22
Computer & Mathematical	(20)	0.51	328

Source: EMSI, Garner Economics

Figure 43
Fayetteville (Zip codes 30214 and 30215)
Occupational Specialization & Growth

Size of the bubble represents total employment.
Source: EMSI, Garner Economics

About Our Company

Garner Economics, LLC provides innovative economic and community development solutions in a competitive global market. We offer site selection, analytical research, industry targeting, strategic planning, and organizational development with a wealth of expertise to companies, communities, and organizations globally. Garner Economics is based in Atlanta (Fayetteville), Georgia and has representative offices in both Europe and Asia.

Since 2003, Jay Garner, a 36-year internationally recognized expert in the economic development, chamber of commerce, and site location consulting professions has headed our team, which is rounded out by talented experts.

Cyndi Dancy, a research analyst for Garner Economics, served as the author of the economic and labor analysis. Tina Valdecanas, Senior Associate and Strategist for Garner Economics, led the stakeholder input sessions and analysis. Jay Garner conducted the Assets and Challenges Assessment.

APPENDIX A: FOCUS GROUP PARTICIPANTS

- Shelly Anthony, This Is It BBQ
- Dave Barlow
- Bob Barnard, Home Builders Association of Midwest Georgia
- Dr. Joseph Barrow, FCBOE
- Darrell Bingham, Primary Residential Mortgage
- Jack Bowdoin, Heritage Bank
- Kathaleen Brewer, K. Brewer Studio
- Deborah Britt, Piedmont Fayette Hospital
- Steve Brown, Fayette County
- Sam Burch, Fayetteville DDA
- Mike Burnett, Piedmont Fayetteville
- Kathy Choran
- Dr. David Campbell, Fayetteville First United Methodist Church
- Brian Cooper, Pinewood Studios
- Roch DeGolian, Ravin Homes
- Larry Dell
- Mickey Edwards, City of Fayetteville
- Irma Ellington, Head Start/Reach Services
- Danny England, Liberty Tech School
- Tony Ferguson, Georgia Power
- Ray Gibson, City of Fayetteville
- Steve Gulas, City of Fayetteville P/Z
- Patsy Gullett, Fayetteville Main Street
- Rick Halbert, Halbert Construction
- Darryl Hicks, Development Authority
- Rich Hoffman, Hoffman Tire Pros
- Alan Jones, City of Fayetteville
- Ernie Kearns, Nationwide Insurance
- Addison Lester, Property Owner/Fayetteville DDA
- Jim Lynch, Liberty Tech School
- Phil Mallon, Fayette County
- Doug Mickey, Chick-fil-A
- David Mowell, C.J. Mowell Funeral Home
- Sarah Murphy, Fayetteville DDA
- David Murray, King's Watch Repair/Scoops
- Clark Ninneman, Fayetteville DDA
- Charles Oddo, Fayette County
- Jim Pace, Group VI Development
- Steve Rapson, Fayette County
- Alex Rodriguez
- Charles Rousseau, Fayette County
- Harlan Shirley, Retired
- Scott Stacy, City of Fayetteville
- Vicki Turner, Fayetteville Main Street
- Carlotta Ungaro, Fayette Chamber of Commerce
- Michelle Warren, Fayette County Realtors
- Geneva Weaver, Fayette County News
- Jim Williams, City of Fayetteville
- Brian Wismer, City of Fayetteville
- Jamie Wyatt, Fayetteville DDA
- Joan Young, Fayette County Development Authority
- Pam Young, Southern Conservation Trust

Appendix B: Focus Group Responses

Below, is a summary of the responses to the questions posed during each of the focus groups. ***Note:*** The comments that follow are from focus group respondents; they may not necessarily be a statement of fact, but represent an opinion or perception. Responses repeated in multiple groups are identified with the number of occurrences in parentheses (For example, (3) denotes that this comment was mentioned in all three of the focus groups).

1. What are several words or phrases that describe Fayetteville?

Overall, the three focus groups were positive in their description of the City of Fayetteville and its quality of place. Several noted that the City has a reputation for being against growth and that there are still tensions regarding development in the City. There was also discussion within the groups regarding the City's aging demographics. Nevertheless, groups noted the City's historic charm and family-friendliness as positive attributes.

Specific responses given were:

- Opportunity (3)
- Historic (3)
- Traffic congestion (2)
- In transition
- Too many vacant buildings
- Quality
- Comfortable
- Active/healthy
- Friendly
- Desirable
- Southern
- Family-oriented
- Old Courthouse
- Stagnating
- Perceived crime
- City is more fluid and adaptive than the County
- Aging

2. What do you think are some of the biggest obstacles that inhibit Fayetteville in its ability to attract, expand, or retain businesses and investment?

While the focus groups gave the City credit for improving its image and activities to attract companies, several feel that politics and a perception that the City is against growth are dissuading companies from considering Fayetteville as a business location. Participants also noted the difficulty of getting to Fayetteville (poor accessibility to major highways or interstates) and traffic within the City as deterrents. Finally, there was discussion about the lack of qualified workers living in the City. (The perception is that residents have greater job opportunities outside Fayetteville).

Groups also commented on the effects of not having a major corporate presence in the City and the lack of amenities for young professionals as gaps that place Fayetteville in a less than competitive position in attracting businesses or talent to locate there.

Specific responses given were:

- Politics (2)
- Lack of accessibility (2)
- Traffic (2)
- Labor force (2)
- Lack of investment
- Ineffective land-use plan
- Resistance to change
- Old-fashioned ideas
- Landlocked
- High taxes
- Redevelopment obstacles
- Process/regulations
- Lack of available buildings and space
- Aging/missing infrastructure
- Lack of transportation options
- Crime
- Lack of housing options for younger people
- Lack of amenities for talent
- Aging population
- Few retail options
- Lack of existing industries
- Parking (especially downtown)

3. On a scale of 1 to 5, with 5 being best, how would you rate the business climate of the City of Fayetteville?

Participants gave the City an average score of 3.4, which would earn Fayetteville a score slightly above average. They note that, with the exception of the land-use plan and a sign ordinance, the policies in place locally are sound. Participants made special note of the improvement over the last few years. They note that the City is very approachable and organized and is working to counteract its image of being content to be a bedroom community or averse to change. One group noted that Fayetteville is much easier to work with than the County. Others also noted that Fayetteville would do better to leverage its proximity and connections with Peachtree City rather than try to compete with it.

Looking forward, participants believe that Fayetteville should be more proactive in attracting businesses and talent. Many participants also voiced a need to revisit the City's land-use plan and make it more flexible.

4. What do you see as Fayetteville's strengths?

The City's proximity to Hartsfield-Jackson International Airport, its historic downtown, health care, and sense of community were noted by participants as strengths. The groups also referenced the energy and potential of Pinewood Studios, the City's well-educated population, and available sites as additional assets. Other strengths noted in the groups are Fayetteville's relatively lower cost of real estate, Georgia Military College, its linkages with the local high schools, and the relative lack of traffic.

Specific responses included:

- Historic/downtown assets (2)
- Proximity to the airport (3)
- Premier hospital facilities (2)
- Family values/Sense of community (2)
- Pinewood Studios (2)
- Well-educated population (2)
- Lot of available space (2)
- Quality of place (2)
- Controlled growth
- Strong leaders
- Religious availability
- Price of real estate (relatively lower)
- Georgia Military College
- Well-paid community
- Relatively no traffic
- Sewer capacity to handle
- Museums

5. How do you see the current labor situation in the area (both quality and employee attraction and availability)?

On a whole, participants believe that labor is available in the region, but that it is difficult to attract the needed talent to live and work in Fayetteville for a number of reasons. For young professionals, participants note that the lack of amenities for millennials makes it difficult to compete with other areas in the Atlanta metropolitan area. For example, young workers are willing to commute to Pinewood Studios daily rather than find housing in Fayetteville.

Participants also note that the relatively high cost of housing in the City makes it an unaffordable choice for lower-wage/hourly workers.

Additionally, the groups discussed the increased competition in the region for both hourly workers and technical staff. One example given is the health care industry. While opportunities exist in Fayetteville, health care workers are more apt to choose communities closer to Atlanta, as there is a greater concentration of hospitals there. Finally, participants noted the lack of workers with technical skills and the need for more apprenticeships or vocational training.

6. What infrastructure is missing or unsatisfactory in the City?

Most of the responses to this question revolved around transportation and traffic issues and the lack of amenities for young professionals or young families. All focus groups noted the need to improve the City's internal road system. Other responses most frequently noted include parking along the downtown square, parks and trails, and places where the community can congregate.

Other responses centered around amenities and space that would attract business and talent to the community (e.g., support for building out the sewer capacity, Internet access, or Class A office space).

Specific responses to the question on infrastructure needs included:

- Efficient road system (internal) (3)
- Parking—around square is insufficient (2)
- Bike trails
- Dog park
- Alternative transportation options
- Access to major highways
- No recreational parks
- No functioning Convention and Visitors Bureau
- Streets, sewer (limiting growth), Internet
- Shovel-ready sites
- Civic center/venue
- Aquatics center
- Shopping destination
- Execution of long-term plan
- Class A office space

7. What would you work to change about the community, not worried about money or politics?

Responses to this question centered on ways to increase the attractiveness of the City and its ability to draw visitors and talent. Items suggested included improvements to the internal roadways, support for the school system, and activities and places that build a sense of community. An underlying thread among the suggestions is the need to build a common vision for the City's future and take steps to implement strategies necessary to attain the vision.

Specific responses included:

Business attraction and retention efforts

- Attract more businesses to lessen out-commuting patterns and transition away from being a bedroom community
- Find a way to better link the business community and the educational system
- Develop targeted Class A office space

Product improvement efforts

- Improve traffic and accessibility to major highways and the internal road network
- Build a strong downtown that is attractive and accessible
- Protect the historic and small-town character of the City
- Build more recreational facilities (parks, trails, etc.)
- Build a cultural arts district
- Alleviate parking issues downtown
- Increase the quality of schools in the City
- Better leverage the Tax Allocation Districts (TAD)
- Develop an inter-city transportation system

Other

- Build true cooperation within the County
- Better brand what Fayetteville has to offer

8. Give some examples of unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the City?

Participants are especially proud of having Pinewood Studios in the City and the film program to support it. Other examples provided include the work of Georgia Military College and dual enrollment programs, as well as "Project Lead the Way." Additionally, participants noted the improvements within the City to accommodate growth, initiatives in the square to build community, and the Southern Ground Amphitheater as positive influences to Fayetteville's quality of life and business climate.

9. Are there programs in peer/competitor regions that Fayetteville should consider for the City? If so, give examples.

Responses to this question focused on policies the City could adopt to strengthen downtown and make Fayetteville more attractive to talent and visitors.

Suggestions for strategies pertaining to product improvement included cities that maintain their historic feel and arts (Savannah, Georgia); cities that are or became more walkable (Brookhaven, Georgia; Washington, DC); family-friendly cities (Cobb County, Georgia); cities that are able to align their business, academic, and environmental concerns and attract businesses with a unified voice (Franklin, Tennessee).

Finally, participants noted the work done with the Georgia Tech investors programs and noted that Fayetteville would do well to garner interest from venture capital or other funders.

10. What types of companies do you think would be a good fit for the area?

Several of the suggestions centered around business that could take advantage of Fayetteville's proximity to Hartsfield-Jackson International Airport (and the Atlanta metropolitan area) as well as the work being done at Pinewood Studios. Specific responses included:

- High-tech (2)
- Corporate headquarters (2)
- Tourist attractions (2)
- Small businesses
- Boutique shops
- Research companies
- Software
- Data centers
- Health care operations

11. What are your past experiences with, and current perceptions of, the various economic development efforts by group(s) involved in investment attraction, retention, and assisting entrepreneurs? How could these efforts or groups be improved?

The majority of participants were satisfied with the work being done by the various economic development organizations in the City and County and recognize that for many years, the community's emphasis was not on economic development. They noted that communications and coordination among the groups could be better and that more should be done to identify avenues for true collaboration among entities in the County—especially as it pertains to setting Fayette County apart as a destination for talent and companies in the Atlanta metropolitan region. An underlying theme of the discussion was the need to set forth a clear vision for the City (and, in doing so, settle the tensions between those who want to encourage growth and those who would like to maintain the status quo. This includes the City's leadership to be proactive champions for that change, including developing an incentives package for the City or another way to entice business growth.

Another theme of discussion among the focus groups was the need to better brand Fayetteville as a location—both to companies and to its current residents. Comments suggest that the City has not fully leveraged the positive change of recent years nor highlighted the community's achievements and current strength.

12. Are there any other issues of concern to you?

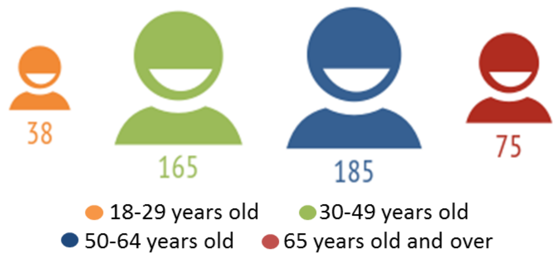
At the conclusion of each focus group, participants were asked if there are other issues affecting the City that Garner Economics should be aware of as we help craft the economic development strategy. Among the themes suggested are:

- **Need to mitigate negative perceptions:** Participants noted that the City suffers from negative perceptions of its crime rate and the K-12 system, especially when compared to Peachtree City. One suggestion for combatting those perceptions would be to work on a community beautification program—working on gateways and signage to make Fayetteville more welcoming.
- **Need to build tax base:** Several participants noted that, while the City is looking to attract business to Fayetteville, it should be cognizant of how that business will contribute to the City's tax base.
- **Pay attention to demographics:** While much of the focus group discussion centered around attracting young professionals and millennials, several participants noted that a large part of the City's population are baby boomers who have aged in place. Hence, they caution that plans to improve the City's quality of place should also be directed toward meeting the demands of that population.
- **Need for a brand:** In discussing other opportunities for the City, several participants noted that Fayetteville does not have a unified brand. In addition to not having a visitors bureau, the City lacks a strong identity. Participants suggested that Fayetteville look at better ways to brand itself and instill a unified brand when it looks to attract talent, companies, or visitors.

APPENDIX C: ELECTRONIC SURVEY RESULTS*

Survey Respondents (n=182)

By Age



By Residence v. Place of Work

• Live in Fayetteville (ZIP code 30214)	58
• Work in Fayetteville	73
• Live and work in Fayetteville	42
• Neither live nor work in Fayetteville	90

*Responses to main survey; does not include responses to student survey.

1. What words or phrases describe the City of Fayetteville? (Choose up to five responses.)

Response option	# rec'd
Historic	65
Traffic congestion	60
Aging	60
Family-oriented	58
Potential	56
Too many vacant buildings	56
In transition	49
Southern	47
Perceived crime	47
Proximate to Atlanta Hartsfield-Jackson International Airport	43
Comfortable	39
Stagnating	32
Commuter town	31
Friendly	31
Desirable	30
Lacking retail options	28
Growing	27
No follow-through on plans or strategies	22
Quality	19
Other	16
Relatively lower costs of housing	15
Active/healthy	5
Weak talent pipeline	3

Other responses:

- Resisting change
- Too much influence by developers
- Not attractive to young adults
- Trashy/mostly concrete aesthetically
- Lacking upscale restaurants/retail
- Becoming Riverdale
- Prestigious
- Conservative, safe
- Suburban
- Racially segregated, not progressive
- Increasing crime
- Lack of transportation for teens
- Safe and secure community

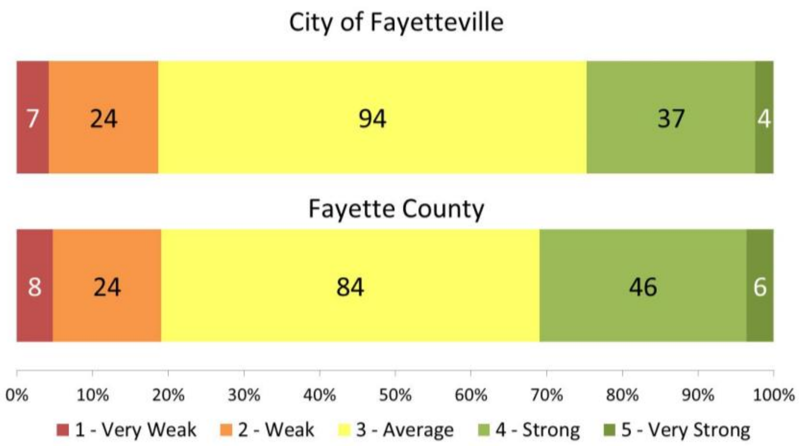
2. What do you think are some of the biggest obstacles that inhibit Fayetteville in its ability to attract, expand, or retain businesses and investment? (Choose up to five responses.)

Response option	# rec'd
Resistance to change	72
Lack of housing options for younger people	59
Lack of amenities for talent attraction	55
Politics	54
Aging population	50
Parking (especially downtown)	49
Lack of accessibility to major highways	47
"Anti-growth" climate	46
Traffic	44
Crime	42
Aging/missing infrastructure	30
Few retail options	28
Lack of transportation options	26
Other	19
Ineffective land-use plan	18
Process/regulations	18
Redevelopment obstacles	17
Weak labor force	15
High taxes	12
Landlocked	8
Lack of available buildings and space	7

Other responses:

- Lack of high-speed Internet
- Need area where you can live, work, shop, eat, and be entertained all within walking distance.
- Public schools geared towards future needs
- Small population/market
- Lack of golf cart paths
- Crime and aging developments
- City codes
- County government that is willing to market the positives
- Lacks strong creative community (cultural arts)
- Unattractive retail along HWY 85
- Influx of low-income and criminal populations
- Resistance to change

3. On a scale of 1-5, with 5 being "Very Strong," how would you rate the business climate of Fayetteville? Fayette County?



4. What do you see as the City's strengths? (Choose up to five.)

Response option	*# rec'd*
Proximity to Atlanta Hartsfield-Jackson International Airport	112
Premier hospital facilities	102
Pinewood Studios	102
Historic/downtown assets	81
Family values/Sense of community	78
Well-educated population	49
Proximity to Atlanta metro area	47
Quality of place	46
Price of real estate (relatively lower)	32
Affluent community	31
Religious availability	26
Controlled growth	25
Relatively less traffic	19
Lot of available space	18
Sewer capacity to handle more growth	13
Georgia Military College	11
Other	8
Strong leaders	3
Museums	0

Other responses:

- Quality schools
- Diversity
- Low crime and good law enforcement accessibility
- Diversity in the citizens
- Parks
- Safe environment
- Growth

5. How would you describe the current labor situation in the area (both quality and employee attraction and availability)?

Response option	*# rec'd*
Difficult to attract young professionals	78
Qualified residents available, but they choose to work elsewhere	69
Difficult to find skilled mechanical/technical labor	29
Small pool of mid-level professionals	25
Sufficient quantity, but lacking quality	24
Sufficient quality, but lacking quantity	20
Difficult to find entry-level/hourly workers	18
Increasing competition to hire all workers	17
Quantity and quality is excellent	10
Other	7

Other responses:

- Most employment opportunities are for semi-skilled workers
- Do not see a problem
- Too many hourly wage jobs
- No incentive for employees to come to the City

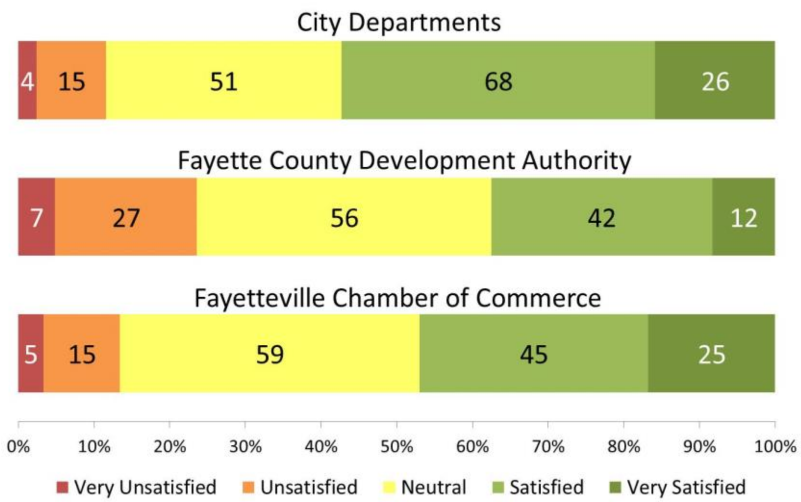
6. For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband Internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks. What hard or soft infrastructure is weak or missing in Fayetteville? (Choose up to five responses.)

Response option	# rec'd
Bike trails	54
Recreational facilities	49
Efficient road network	43
Better access to major highways	42
Civic center/venue	41
Aquatics center	41
Retail destinations	38
Sense of place/amenities	36
Mixed-use developments	36
Parking	36
Broadband	33
Public leadership	32
An incubator to support startups	27
Affordable housing	26
Public transportation	25
Dog park	25
Alternative transportation options	25
Execution of the City's long-term plan	21
A convention and visitors bureau	20
Space for large meetings	19
Other	19
Regional (countywide) approach	15
Realistic goals	13
More sewer capacity	8
Commercial space	5
Shovel-ready sites	5

Other responses:

- Outlet mall
- Higher education and lack of technical education opportunities
- Attractive town center
- Neighborhood sidewalks!
- Walking, golf cart, bike access
- We do not need public transportation in Fayette County
- Performing arts center
- Splash park for kids, playgrounds
- Surrounding counties have a vibrant arts and cultural structure
- Recycling facility
- Do not ruin a good thing!!!!
- Night life for younger generation
- Trolley
- None

7. What are your past experiences with, and current perceptions of, the various entities within the City or County involved in business investment attraction and retention?



8. What types of companies do you think would be a good fit for the area (Select all that apply)?

Response option	% responding
Small businesses	10.6%
Medical/health care	10.5
Technology-driven companies	10.4
Local or unique retail	9.2
Corporate headquarters	8.5
Computer programming/software	8.4
Professional business services	7.3
Regional office operations	7.2
Jobs that can be done virtually	6.3
Light manufacturing	5.8
Destination/tourist attractions	5.6
Technical service support	5.0
Data centers	4.0
Other	1.2

Other responses:

- Fine dining
- All
- Pinewood Studios/film industry support business
- Restaurants
- Retirement communities
- Artists complex
- Liquor store
- Major college/university
- Educational and technical schools
- Automotive manufacturing and aviation jobs

9. Give some examples of local, unique, and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of the City? In other words, what things is the City doing well to attract/retain businesses and talent?

Pinewood Studios and the growth of the film industry in Fayetteville were noted by 59 of those responding. Other attributes receiving multiple explicit mentions are: revitalization of downtown and the square (21), Georgia Military College (11), Piedmont hospital (8), festivals and other activities (7), and the TAD (4). Seventeen respondents answered either "none" or "do not know of any."

10. Are there programs in peer/competitor regions that you've seen that the Fayetteville should consider for this area? Please give examples. (Number in parentheses indicates the number of respondents noting the example.)

Examples of programs or initiatives

- Communities that have built great recreational parks, art facilities, family activities, and festivals (12)
- Walkable communities (4) (e.g., Stone Mountain)
- Cities with more technical training for the young adults (4)
- Communities that have successfully implemented mixed-use developments and transit-oriented development. (3) (e.g, (Gwinnett, North Fulton, DeKalb, Clayton)
- Unique retail (2) (e.g., Woodstock, Georgia; Senioa, Georgia)
- Cities with incentive programs (2)
- Communities with venues to attract large gatherings (e.g., educational competitions, sports)
- Communities with strict zoning (2) (e.g., Peachtree City, Georgia)
- Similar size southern communities that have and are successfully executing a long-term strategic master plan. (2) (e.g., Suwanee, Georgia)
- Communities with senior housing—livable communities (2)
- Communities that support tech startup incentives, biotech & research opportunities
- Examples of regional cooperation with counties
- Cities that are more open to certain types of businesses (e.g., alcohol beverage store)
- Cities with networking and informal education opportunities for young professionals
- Cities that market themselves (re-branding)

Initiatives, continued

- College or university towns
- Cities effectively using the Special Purpose Local Option Sales Tax
- Cities engaged in historic preservation.
- Cities with franchise fairs, employment fairs

Specific city/community examples
- Newnan, Georgia (5)
- Atlanta, Georgia (3) (e.g., concert venues, “Invest-Work-Play (Atlanta),” “Taste of Atlanta,” “Wednesday Wind Down in the Park,” “Attract Corp,” “Celebrate Atlanta,” and various nightlife entertainment)
- Roswell, Georgia (3)
- Peachtree City, Georgia (generally) (2)
- Decatur, Georgia (2) (e.g., Book Festival)
- Alpharetta, Georgia
- Norcross, Georgia
- Serenbe, Georgia
- Woodstock, Georgia
- Buckhead, Georgia
- Jupiter, Florida (mixed-use development, increased public use transportation)
- Johns Creek, Georgia
- Brookhaven, Georgia
- Gwinnett, Georgia (e.g., Arts venues)
- Carrollton, Georgia (e.g., Burson Center)

11. Often, economic development change begins with setting priorities and creating a vision. Without worrying about money or politics, please indicate the top 5 items you would like to see the City leadership take on to strengthen its ability to attract and retain quality companies and talent to Fayetteville. Use 1 to indicate the most important item.

Initiative Option	Ranked First Priority	Ranked Second Priority	Ranked Third Priority	Ranked Fourth Priority	Ranked Fifth Priority	% Ranking Issue in Top 5
Develop downtown and adjacent properties to maintain its historic character, create a more pedestrian-friendly environment, and provide proximate parking options	32	22	20	18	11	61.3%
Build a vibrant community that attracts and retains millennials as well as serves the needs of the aging population	21	10	25	26	16	59.1
Attract and grow jobs so as to lessen the need to out-commute to other parts of the Atlanta metro area	16	27	21	13	13	53.8
Fix the internal road system so that traffic flow improves and there is better access to all areas of the City	39	13	9	10	17	52.6
Create a shopping district that is unique, central, and will draw people from outside the city	9	17	14	15	6	36.5
Ensure that our school system is ready to address the diversity that the entire county is experiencing	6	17	11	13	9	33.7
Improve K-12 schools within Fayetteville so that they are competitive to the options in Peachtree City	21	10	5	9	9	32.3
Better market Fayetteville to both potential tourists and companies, as well as existing residents	7	11	8	11	13	30.4
Promote regionalism in Fayette County so that the municipalities work together rather than compete	2	11	19	8	8	28.9
Complete and open a new park or nature area within the City	5	7	9	14	11	28.0
Create a cultural arts district	7	12	8	8	6	24.6
Host more festivals and social events to build a sense of community	2	3	11	10	11	22.7
Encourage developments that are lifestyle centers	2	6	3	4	12	16.7
Improve inter-city transit	1	2	4	2	10	11.8%
Better leverage and use the Tax Allocation Districts	3	4	3	1	2	7.7%

12. Is there another initiative/priority you would suggest?

Policies

- Working collaboratively with other governments, nonprofits, business, agencies, etc. to accomplish grander projects in the most economical way
- Create a plan to consider how the City will handle growth
- Open communication with citizens via social network
- Attract more white collar jobs and options for those individuals to spend that money locally and not out of the City/County
- Incentives should be provided to relocate and attract the appropriate development to the appropriate areas
- More cooperation with Peachtree City
- Find a way to attract Fayetteville-raised kids to return to Fayetteville after they graduate from college

Product improvement

- Increase police patrols of neighborhoods and decrease crime (4)
- Create a dog park (2)
- Better lighting in our communities (2)
- Build more family activities (2)
- We also need more high-quality restaurants
- Transportation to and from Hartsfield-Jackson International Airport
- Connect to the metropolitan Atlanta transit system
- Make the square more pedestrian-friendly and a destination for families at night and on weekends
- Synchronize the traffic lights
- Repair existing roads, street sewers should be flush with road surface
- Increase public safety
- Prohibit inner city transit coming into Fayetteville
- Complete a bypass around the City
- Schools need to be focused on "world competitiveness"
- Local shuttle bus that would complete a loop from downtown to the hospital area and a north/south loop from the pavilion to the center of the City and down to the area of Kroger and Publix on the south side
- Get rid of all the half-abandoned ghetto strip malls along 85
- Better/easier access to major highways/interstates
- Fill buildings with unique shops
- Encourage schools to participate with more activities offered on the City square
- Improve & update sewer system
- Develop a central cultural center to facilitate increased interaction among the citizens that creates an environment that will promote communications and relationship building to gain an appreciation and acceptance of diversity and cultural differences
- Create a shopping district that is unique, central, and will draw people from outside the City
- Broaden our school choices (charter, special needs/education schools)
- Entertainment after dusk/dark
- Continue to increase the walking paths, Hwy 85, Redwine Road, to library and other City areas
- Build indoor recreation facility/pools, courts, and other activities.
- Civic Center/Cultural Arts facility
- Business incubators
- Create places and attractions for millennials
- Create more affordable housing for young families

13. Are there any other issues that should be examined as we undertake our economic development analysis of Fayetteville?

- Ensure Fayetteville addresses the aging community.
- You must create a sense of safety (mentioned in some way by five respondents).
- Break the deadlock between County and City governments to relieve the traffic situation and build on smoothing the hostility that currently exists.
- Fayetteville should maintain a good quality of life for those having contributed to the positive successes of this county. Low-income housing, apartments, and high-density development usually caused a tax drain in property tax, school tax, etc.
- Fayetteville should settle the NAACP lawsuit.
- Cut out the political squabbling. Agree on a plan for quality growth and execute the plan. Keep listening.
- Encourage more youth leadership in studying and developing these plans, so it's not all old people creating a relaxing retirement community.
- Fayetteville will not prosper if we do not get educated, civic-minded, unselfish, and forward-thinking people in leadership.
- Consider fire consolidation.
- I'm not so certain that we can do much about our newspapers, but on the front page and in the editorial/letters written in that paints a huge picture about the County, vitriol is consistently published and it turns people away. It promotes narrow-mindedness and establishes an offensive mindset that is broadcast to those who live here and potential visitors, those looking for a new home or a place to conduct business.
- I think that the City needs to start being more proactive instead of reactive. Get all of your City departments up to staff and make them competitive with neighboring cities (pay and benefits).
- Our leaders should be more proactive rather than reactive. We need more collaboration with governmental agencies across the County.
- There have been many studies and concepts developed over the last 30 years. We should look at all of those and come up with a viable plan for the City. Sometimes I feel that we talk about wanting change in Fayetteville, but deep down, we want to keep things the same to preserve what we have.

APPENDIX D: 2015 FAYETTEVILLE INDUSTRY DETAILS

Highly specialized industries (location quotients greater than 1.20) and high relative earnings (above $48,532, the national average earnings per worker) are highlighted in **green**. Zip code data from 30214 and 30215 were used for industry details listed below.

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
Crop & Animal Production	**0.09**	**26**	**(33)**	**$18,637**
Utilities	**0.14**	**12**	**Insf. Data**	**$88,382**
Construction	**1.37**	**1,760**	**283**	**$47,677**
Residential Building Construction	0.69	123	-12	$41,671
Nonresidential Building Construction	1.43	179	-3	$51,056
Utility System Construction	6.21	486	238	$57,199
Foundation, Structure & Building Exterior Contractors	0.41	62	-48	$34,076
Building Equipment Contractors	1.44	481	99	$49,744
Building Finishing Contractors	0.80	150	7	$35,504
Other Specialty Trade Contractors	1.74	269	15	$36,493
Manufacturing	**0.36**	**696**	**180**	**$68,674**
Other Food Manufacturing	0.38	11	6	$46,897
Tobacco Manufacturing	7.99	16	11	$120,379
Petroleum & Coal Products Manufacturing	1.43	24	9	$64,258
Soap, Cleaning Compound & Toilet Preparation Manufacturing	3.60	60	55	$49,108
Other Chemical Product & Preparation Manufacturing	8.05	106	45	$54,990
Plastics Product Manufacturing	0.26	22	17	$39,714
Cement & Concrete Product Manufacturing	0.58	16	11	$73,328
Alumina & Aluminum Production & Processing	1.26	12	-17	$43,798
Boiler, Tank & Shipping Container Manufacturing	0.73	11	11	$37,219
Machine Shops; Turned Product & Screw, Nut & Bolt Manufacturing	1.48	87	45	$49,426
Agriculture, Construction & Mining Machinery Manufacturing	0.58	23	2	$90,031
Computer & Peripheral Equipment Manufacturing	1.25	32	27	$135,216
Audio & Video Equipment Manufacturing	43.1	133	-14	$106,675

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
Motor Vehicle Parts Manufacturing	0.28	24	8	$45,066
Other Miscellaneous Manufacturing	0.50	24	1	$44,099
Wholesale Trade	**0.59**	**546**	**71**	**$60,326**
Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers	1.28	69	18	$47,753
Furniture & Home Furnishing Merchant Wholesalers	0.66	11	6	$36,719
Lumber & Other Construction Materials Merchant Wholesalers	2.08	67	24	$50,766
Professional & Commercial Equipment & Supplies Merchant Wholesalers	0.62	61	14	$50,197
Household Appliances & Electrical & Electronic Goods Merchant Wholesalers	0.57	29	-30	$75,237
Machinery, Equipment & Supplies Merchant Wholesalers	0.29	31	4	$61,310
Apparel, Piece Goods & Notions Merchant Wholesalers	0.74	18	7	$58,063
Chemical & Allied Products Merchant Wholesalers	1.74	36	9	$41,084
Miscellaneous Nondurable Goods Merchant Wholesalers	0.63	33	-18	$33,832
Wholesale Electronic Markets & Agents & Brokers	1.17	167	43	$83,455
Retail Trade	**1.49**	**3,706**	**348**	**$22,687**
Automobile Dealers	0.40	77	0	$40,489
Other Motor Vehicle Dealers	0.54	12	7	$25,589
Automotive Parts, Accessories & Tire Stores	1.95	170	53	$30,152
Furniture Stores	1.36	48	1	$30,254
Home Furnishings Stores	2.32	92	42	$23,752
Electronics & Appliance Stores	1.61	127	-22	$33,056
Building Material & Supplies Dealers	1.96	338	54	$26,989
Lawn & Garden Equipment & Supplies Stores	1.06	27	-31	$17,894
Grocery Stores	1.66	689	131	$21,534
Specialty Food Stores	0.32	12	7	$17,278
Health & Personal Care Stores	1.70	275	26	$28,833
Gasoline Stations	1.07	149	35	$18,208
Clothing Stores	1.54	253	-21	$14,587
Shoe Stores	0.57	18	-4	$17,159
Jewelry, Luggage & Leather Goods Stores	1.54	40	11	$23,075
Sporting Goods, Hobby & Musical Instrument Stores	3.22	278	-16	$18,006
Book Stores & News Dealers	0.65	10	-3	$12,459

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
Department Stores	1.22	252	-41	$14,794
Other General Merchandise Stores	1.97	559	131	$22,842
Florists	1.12	14	-6	$18,152
Office Supplies, Stationery & Gift Stores	1.88	90	-12	$14,705
Used Merchandise Stores	0.33	11	6	$18,250
Other Miscellaneous Store Retailers	1.50	81	8	$20,598
Electronic Shopping & Mail-Order Houses	0.78	46	4	$38,524
Direct Selling Establishments	1.01	34	-3	$15,690
Transportation & Warehousing	**0.40**	**316**	**62**	**$58,560**
Rail Transportation	2.50	98	21	$100,409
General Freight Trucking	0.50	91	41	$40,154
Specialized Freight Trucking	0.99	71	27	$39,577
Freight Transportation Arrangement	0.49	17	12	$45,903
Information	**0.34**	**154**	**(26)**	**$37,836**
Newspaper, Periodical, Book & Directory Publishers	0.49	33	-13	$37,526
Motion Picture & Video Industries	0.90	59	-4	$12,001
Sound Recording Industries	3.52	18	13	$77,666
Wired Telecommunications Carriers	0.17	16	-2	$63,279
Wireless Telecommunications Carriers (except Satellite)	0.79	20	-1	$46,538
Finance & Insurance	**0.70**	**674**	**52**	**$58,173**
Depository Credit Intermediation	0.81	212	-24	$50,358
Nondepository Credit Intermediation	0.59	54	11	$46,135
Securities & Commodity Contracts Intermediation & Brokerage	0.37	26	11	$162,352
Other Financial Investment Activities	0.67	53	29	$29,995
Agencies, Brokerages & Other Insurance Related Activities	1.53	316	36	$61,502
Real Estate & Rental & Leasing	**0.58**	**230**	**(57)**	**$33,049**
Lessors of Real Estate	0.39	48	-12	$31,095
Offices of Real Estate Agents & Brokers	0.63	41	-16	$35,553
Activities Related to Real Estate	0.60	71	-2	$29,394
Automotive Equipment Rental & Leasing	0.41	13	8	$31,248
Consumer Goods Rental	0.70	17	-26	$31,935

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
General Rental Centers	3.64	24	-16	$28,220
Professional, Scientific & Technical Services	**0.62**	**941**	**(75)**	**$48,471**
Legal Services	0.52	109	-3	$58,047
Accounting, Tax Preparation, Bookkeeping & Payroll Services	1.06	189	-30	$45,047
Architectural, Engineering & Related Services	0.36	84	-23	$61,349
Specialized Design Services	1.14	47	13	$26,780
Computer Systems Design & Related Services	0.36	110	-62	$73,985
Management, Scientific & Technical Consulting Services	0.55	135	-21	$60,476
Advertising, Public Relations & Related Services	0.59	50	7	$37,180
Other Professional, Scientific & Technical Services	1.84	217	44	$28,495
Management of Companies & Enterprises	**0.11**	**38**	**1**	**$52,660**
Administrative & Support & Waste Management & Remediation Services	**0.37**	**559**	**(29)**	**$30,724**
Office Administrative Services	0.17	13	8	$58,235
Employment Services	0.10	56	-3	$56,482
Business Support Services	0.39	59	-14	$28,213
Travel Arrangement & Reservation Services	0.84	28	9	$39,921
Services to Buildings & Dwellings	0.81	342	17	$24,454
Other Support Services	0.53	25	-29	$23,421
Remediation & Other Waste Management Services	0.83	18	13	$42,238
Educational Services	**0.61**	**368**	**(15)**	**$21,659**
Elementary & Secondary Schools	1.16	188	-13	$22,737
Business Schools & Computer & Management Training	1.54	19	8	$61,153
Other Schools & Instruction	1.87	153	8	$15,505
Health Care & Social Assistance	**1.60**	**4,771**	**1,028**	**$44,855**
Offices of Physicians	2.11	845	88	$69,151
Offices of Dentists	1.82	267	49	$51,175
Offices of Other Health Practitioners	3.45	495	271	$42,485
Outpatient Care Centers	0.61	72	19	$47,484
Medical & Diagnostic Laboratories	0.56	23	18	$42,272
Home Health Care Services	0.97	205	53	$41,939
Other Ambulatory Health Care Services	0.52	26	16	$20,031

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
General Medical & Surgical Hospitals	2.16	1,495	123	$51,206
Nursing Care Facilities (Skilled Nursing Facilities)	0.91	231	68	$27,209
Residential Intellectual & Developmental Disability, Mental Health & Substance Abuse Facilities	0.11	11	-1	$21,863
Continuing Care Retirement Communities & Assisted Living Facilities for the Elderly	2.01	268	131	$21,579
Individual & Family Services	1.61	553	224	$24,042
Child Day Care Services	1.45	277	-27	$18,324
Arts, Entertainment & Recreation	**0.83**	**328**	**11**	**$17,571**
Performing Arts Companies	0.69	14	9	$41,794
Spectator Sports	0.73	21	8	$45,018
Agents & Managers for Artists, Athletes, Entertainers & Other Public Figures	1.96	11	6	$37,056
Independent Artists, Writers & Performers	0.85	38	0	$16,346
Other Amusement & Recreation Industries	1.17	233	-4	$12,572
Accommodation & Food Services	**1.33**	**2,689**	**1,019**	**$13,956**
Traveler Accommodation	0.15	41	17	$27,481
Special Food Services	0.27	33	0	$17,495
Drinking Places (Alcoholic Beverages)	1.58	89	51	$16,691
Restaurants & Other Eating Places	1.64	2,523	949	$13,547
Other Services (except Public Administration)	**1.38**	**1,575**	**266**	**$23,151**
Automotive Repair & Maintenance	1.52	264	37	$35,518
Electronic & Precision Equipment Repair & Maintenance	0.58	12	0	$40,558
Commercial & Industrial Machinery & Equipment (except Automotive & Electronic) Repair & Maintenance	1.25	46	-12	$46,694
Personal & Household Goods Repair & Maintenance	1.45	37	16	$22,764
Personal Care Services	0.69	128	19	$21,571
Death Care Services	1.39	29	4	$29,742
Dry Cleaning & Laundry Services	0.60	29	-9	$17,723
Other Personal Services	1.28	75	45	$29,974
Religious Organizations	2.95	770	130	$16,632
Social Advocacy Organizations	0.38	12	7	$41,981
Business, Professional, Labor, Political & Similar Organizations	0.83	55	23	$42,259
Private Households	0.89	115	0	$13,142

Industry	LQ	2015 Jobs	Five-Year Change	Average Annual Salary
Government	**1.20**	**4,455**	**(454)**	**$42,225**
Federal Government, Civilian	0.69	301	-55	$103,186
Federal Government, Military	0.57	179	0	$27,108
State Government, Excluding Education & Hospitals	0.15	51	-6	$28,942
Education & Hospitals (Local Government)	2.35	3,056	-382	$37,184
Local Government, Excluding Education & Hospitals	1.02	868	-8	$42,704

Source: EMSI 2nd Quarter 2015, Garner Economics

APPENDIX E: 2015 FAYETTEVILLE OCCUPATIONAL DETAILS: LEADING OCCUPATIONAL CATEGORIES

Highly specialized occupations (location quotient greater than 1.20) and high relative earnings (above $22.06, the national average hourly wage) are highlighted in **green**. Zip code data from 30214 and 30215 were used for occupational details listed below.

Occupation	LQ	2015 Jobs	2010–2015 Change	Average Hourly Earnings
Management Occupations	**0.92**	**1,174**	**87**	**$45.28**
Chief Executives	1.18	56	5	$78.60
General & Operations Managers	1.18	394	60	$52.17
Marketing Managers	0.59	18	1	$55.79
Sales Managers	0.75	44	3	$53.78
Administrative Services Managers	1.16	51	6	$42.24
Computer & Information Systems Managers	0.57	31	0	$56.92
Financial Managers	0.78	66	4	$57.15
Transportation, Storage & Distribution Managers	0.63	11	Insf. Data	$40.73
Human Resources Managers	0.85	17	1	$47.32
Construction Managers	1.03	61	(3)	$32.12
Education Administrators, Preschool & Childcare Center or Program	1.63	17	(1)	$19.75
Education Administrators, Elementary & Secondary School	2.36	85	(11)	$37.95
Architectural & Engineering Managers	0.44	13	0	$59.41
Food Service Managers	1.40	63	18	$18.71
Medical & Health Services Managers	1.07	54	8	$44.98
Property, Real Estate & Community Association Managers	0.72	28	(5)	$21.88
Social & Community Service Managers	0.86	19	5	$28.20
Managers, All Other	0.75	79	(3)	$32.08
Business & Financial Operations Occupations	**0.74**	**869**	**44**	**$31.34**
Wholesale & Retail Buyers, Except Farm Products	0.60	12	2	$28.28
Purchasing Agents, Except Wholesale, Retail & Farm Products	0.58	27	2	$27.49
Claims Adjusters, Examiners & Investigators	0.44	19	(2)	$30.59
Compliance Officers	0.59	23	0	$26.76
Cost Estimators	1.18	42	8	$27.14
Human Resources Specialists	0.67	51	2	$25.62
Management Analysts	0.77	93	(3)	$38.27
Meeting, Convention & Event Planners	0.83	12	Insf. Data	$22.40

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Training & Development Specialists	0.91	35	4	$27.30
Market Research Analysts & Marketing Specialists	0.72	57	10	$28.05
Business Operations Specialists, All Other	0.78	119	4	$31.67
Accountants & Auditors	0.81	172	(3)	$33.19
Appraisers & Assessors of Real Estate	0.86	12	(2)	$19.51
Financial Analysts	0.56	24	3	$34.66
Personal Financial Advisors	0.84	32	9	$47.74
Insurance Underwriters	0.91	13	1	$30.77
Loan Officers	0.61	29	0	$36.62
Tax Preparers	1.20	19	(3)	$20.11
Financial Specialists, All Other	0.62	14	0	$28.88
Computer & Mathematical Occupations	**0.51**	**328**	**(20)**	**$34.26**
Computer Systems Analysts	0.53	46	(3)	$34.64
Computer Programmers	0.45	23	(6)	$39.91
Software Developers, Applications	0.38	42	(4)	$39.79
Software Developers, Systems Software	0.44	28	0	$41.16
Web Developers	0.53	13	(1)	$27.09
Database Administrators	0.92	17	0	$36.44
Network & Computer Systems Administrators	0.57	33	(2)	$35.81
Computer Network Architects	0.47	11	(1)	$45.96
Computer User Support Specialists	0.67	67	(1)	$23.07
Computer Network Support Specialists	0.58	17	(1)	$30.69
Computer Occupations, All Other	0.41	15	(2)	$40.73
Architecture & Engineering Occupations	**0.41**	**161**	**(10)**	**$33.71**
Civil Engineers	0.46	20	(3)	$39.75
Electrical Engineers	0.38	10	(2)	$38.69
Electronics Engineers, Except Computer	0.57	12	(3)	$39.40
Industrial Engineers	0.37	14	1	$36.39
Mechanical Engineers	0.27	12	0	$37.18
Electrical & Electronics Engineering Technicians	0.65	14	(2)	$25.92
Life, Physical & Social Science Occupations	**0.40**	**79**	**0**	**$31.19**
Clinical, Counseling & School Psychologists	1.24	30	(1)	$25.67

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Community & Social Service Occupations	**1.35**	**517**	**86**	**$19.37**
Educational, Guidance, School & Vocational Counselors	1.45	56	(5)	$20.58
Mental Health Counselors	0.68	14	3	$18.36
Child, Family & School Social Workers	0.88	42	6	$21.56
Healthcare Social Workers	1.35	34	7	$17.83
Mental Health & Substance Abuse Social Workers	0.63	12	Insf. Data	$36.39
Health Educators	3.09	29	5	$12.43
Social & Human Service Assistants	0.94	57	17	$12.13
Community & Social Service Specialists, All Other	1.22	19	4	$20.84
Clergy	2.53	95	14	$16.07
Directors, Religious Activities & Education	3.59	73	16	$13.31
Religious Workers, All Other	4.51	39	10	$55.90
Legal Occupations	**0.57**	**114**	**(6)**	**$44.59**
Lawyers	0.55	68	(6)	$24.92
Paralegals & Legal Assistants	0.62	27	2	$13.26
Education, Training & Library Occupations	**1.80**	**2,456**	**(216)**	**$19.55**
Preschool Teachers, Except Special Education	1.65	114	(2)	$23.63
Kindergarten Teachers, Except Special Education	2.57	63	(6)	$23.63
Elementary School Teachers, Except Special Education	2.83	594	(49)	$24.15
Middle School Teachers, Except Special & Career or Technical Education	3.10	300	(25)	$25.22
Career or Technical Education Teachers, Middle School	10.58	22	(3)	$24.40
Secondary School Teachers, Except Special & Career or Technical Education	1.78	262	(36)	$25.58
Career or Technical Education Teachers, Secondary School	1.60	19	(3)	$23.91
Special Education Teachers, Kindergarten & Elementary School	2.94	88	(11)	$24.08
Special Education Teachers, Middle School	3.06	43	(5)	$24.79
Special Education Teachers, Secondary School	1.83	37	(5)	$15.36
Self-Enrichment Education Teachers	2.17	122	11	$8.89
Substitute Teachers	2.32	217	(27)	$20.77
Teachers & Instructors, All Other	1.71	93	(3)	$25.27
Librarians	1.57	32	(3)	$11.69
Library Technicians	0.95	18	(1)	$26.47
Instructional Coordinators	1.70	38	(2)	$9.75

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Teacher Assistants	1.79	348	(39)	$26.21
Education, Training & Library Workers, All Other	0.76	13	(2)	$10.64
Arts, Design, Entertainment, Sports & Media Occupations	**0.94**	**393**	**45**	**$20.58**
Floral Designers	1.24	11	(2)	$19.46
Graphic Designers	0.85	37	5	$19.29
Interior Designers	1.17	16	4	$12.46
Merchandise Displayers & Window Trimmers	1.42	22	1	$19.20
Coaches & Scouts	0.85	32	(1)	$23.81
Music Directors & Composers	2.38	26	4	$26.41
Musicians & Singers	1.79	51	11	$25.74
Public Relations Specialists	0.67	24	4	$22.25
Writers & Authors	0.80	16	2	$17.60
Interpreters & Translators	1.41	16	4	$16.13
Photographers	2.33	46	11	$33.93
Healthcare Practitioners & Technical Occupations	**1.55**	**1,989**	**314**	**$35.62**
Chiropractors	2.05	15	(1)	$92.53
Dentists, General	1.31	27	3	$23.86
Dietitians & Nutritionists	1.21	13	2	$55.09
Optometrists	6.32	40	Insf. Data	$51.06
Pharmacists	1.57	72	7	$99.68
Family & General Practitioners	0.74	16	(1)	$110.56
Internists, General	1.86	16	1	$73.61
Pediatricians, General	2.03	11	0	$106.87
Surgeons	1.71	13	2	$92.18
Physicians & Surgeons, All Other	2.30	126	15	$43.10
Physician Assistants	1.73	26	5	$35.30
Occupational Therapists	1.48	27	3	$36.59
Physical Therapists	1.22	41	6	$24.56
Respiratory Therapists	1.93	36	3	$31.02
Speech-Language Pathologists	1.38	29	(1)	$42.59
Veterinarians	1.69	19	0	$29.32
Registered Nurses	1.45	619	68	$37.46

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Nurse Practitioners	1.50	29	4	$44.27
Health Diagnosing & Treating Practitioners, All Other	3.72	29	4	$27.18
Medical & Clinical Laboratory Technologists	1.67	42	4	$16.98
Medical & Clinical Laboratory Technicians	1.69	43	8	$32.28
Dental Hygienists	1.56	49	10	$25.13
Cardiovascular Technologists & Technicians	2.19	18	3	$28.80
Diagnostic Medical Sonographers	1.40	14	3	$24.56
Radiologic Technologists	1.28	39	4	$14.18
Emergency Medical Technicians & Paramedics	0.68	26	1	$10.83
Dietetic Technicians	2.58	12	Insf. Data	$12.31
Pharmacy Technicians	1.55	90	10	$18.87
Surgical Technologists	1.82	29	5	$12.25
Veterinary Technologists & Technicians	1.94	29	3	$13.42
Ophthalmic Medical Technicians	4.77	28	17	$17.24
Licensed Practical & Licensed Vocational Nurses	1.38	156	33	$16.53
Medical Records & Health Information Technicians	0.98	29	3	$18.75
Opticians, Dispensing	4.47	53	38	$19.64
Health Technologists & Technicians, All Other	1.70	28	5	$26.77
Healthcare Practitioners & Technical Workers, All Other	1.72	11	Insf. Data	$9.11
Healthcare Support Occupations	**1.37**	**914**	**215**	**$12.35**
Home Health Aides	0.73	108	35	$10.11
Nursing Assistants	1.35	311	79	$16.05
Massage Therapists	0.99	25	6	$16.92
Dental Assistants	1.97	100	19	$13.28
Medical Assistants	2.58	244	61	$14.95
Medical Equipment Preparers	1.57	13	1	$15.21
Medical Transcriptionists	1.41	16	0	$10.09
Veterinary Assistants & Laboratory Animal Caretakers	1.51	19	1	$13.90
Phlebotomists	1.37	24	5	$15.36
Healthcare Support Workers, All Other	1.39	22	3	$31.51
Protective Service Occupations	**0.68**	**369**	**(6)**	**$18.72**
First-Line Supervisors of Police & Detectives	1.25	20	(1)	$28.83

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
First-Line Supervisors of Fire Fighting & Prevention Workers	1.13	11	0	$16.84
Firefighters	1.29	64	(2)	$15.45
Correctional Officers & Jailers	0.32	22	(1)	$33.65
Detectives & Criminal Investigators	0.80	14	(1)	$19.79
Police & Sheriff's Patrol Officers	1.11	117	(2)	$13.21
Security Guards	0.29	51	2	$9.82
Lifeguards, Ski Patrol & Other Recreational Protective Service Workers	1.16	26	1	$17.01
Food Preparation & Serving Related Occupations	**1.42**	**2,802**	**909**	**$9.08**
Chefs & Head Cooks	1.36	28	7	$12.80
First-Line Supervisors of Food Preparation & Serving Workers	1.50	212	79	$8.31
Cooks, Fast Food	2.27	192	82	$9.40
Cooks, Institution & Cafeteria	2.40	163	9	$10.26
Cooks, Restaurant	1.13	201	59	$9.44
Cooks, Short Order	1.20	34	10	$9.27
Food Preparation Workers	1.27	174	46	$9.37
Bartenders	0.92	84	32	$8.16
Combined Food Preparation & Serving Workers, Including Fast Food	1.68	847	354	$8.30
Counter Attendants, Cafeteria, Food Concession & Coffee Shop	1.30	99	29	$8.67
Waiters & Waitresses	1.26	486	128	$9.76
Food Servers, Nonrestaurant	0.82	32	9	$8.73
Dining Room & Cafeteria Attendants & Bartender Helpers	0.85	56	14	$8.16
Dishwashers	1.24	99	27	$8.18
Hosts & Hostesses, Restaurant, Lounge& Coffee Shop	1.46	86	23	$15.88
Building & Grounds Cleaning & Maintenance Occupations	**0.82**	**744**	**43**	**$11.33**
First-Line Supervisors of Housekeeping & Janitorial Workers	0.90	29	3	$17.43
First-Line Supervisors of Landscaping, Lawn Service & Groundskeeping Workers	1.05	24	(2)	$10.91
Janitors & Cleaners, Except Maids & Housekeeping Cleaners	0.71	279	18	$9.38
Maids & Housekeeping Cleaners	0.72	170	28	$14.92
Pest Control Workers	4.11	50	0	$10.95
Landscaping & Groundskeeping Workers	0.92	179	(4)	$15.01
First-Line Supervisors of Personal Service Workers	0.93	30	5	$10.17
Personal Care and Service Occupations	**821**	**972**	**18%**	**$10.15**

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Nonfarm Animal Caretakers	0.98	34	11	$8.46
Ushers, Lobby Attendants & Ticket Takers	1.27	24	(1)	$9.01
Amusement & Recreation Attendants	0.86	39	(3)	$11.46
Funeral Attendants	2.31	12	1	$11.63
Hairdressers, Hairstylists & Cosmetologists	0.75	77	11	$9.05
Childcare Workers	1.48	289	(10)	$9.41
Personal Care Aides	1.08	290	104	$17.61
Fitness Trainers & Aerobics Instructors	0.63	27	6	$10.04
Recreation Workers	1.34	80	15	$17.15
Sales & Related Occupations	**1.17**	**2,899**	**240**	**$15.12**
First-Line Supervisors of Retail Sales Workers	1.47	329	26	$26.26
First-Line Supervisors of Non-Retail Sales Workers	0.63	35	3	$8.71
Cashiers	1.30	696	118	$12.98
Counter & Rental Clerks	0.58	40	(4)	$16.61
Parts Salespersons	0.79	29	7	$11.15
Retail Salespersons	1.56	1,129	60	$31.78
Advertising Sales Agents	0.62	17	(1)	$32.67
Insurance Sales Agents	1.28	145	18	$39.32
Securities, Commodities & Financial Services Sales Agents	0.68	37	4	$26.70
Sales Representatives, Services, All Other	0.69	100	4	$34.45
Sales Representatives, Wholesale & Manufacturing, Technical & Scientific Products	0.61	34	1	$27.02
Sales Representatives, Wholesale & Manufacturing, Except Technical & Scientific Products	0.74	170	27	$30.50
Real Estate Brokers	0.86	13	(3)	$16.10
Real Estate Sales Agents	1.01	70	(17)	$8.81
Door-to-Door Sales Workers, News & Street Vendors & Related Workers	1.18	16	(7)	$18.91
Sales & Related Workers, All Other	0.64	11	1	$24.62
Office & Administrative Support Occupations	**0.87**	**3,162**	**279**	**$15.41**
First-Line Supervisors of Office & Administrative Support Workers	0.90	204	27	$11.75
Switchboard Operators, Including Answering Service	1.06	18	0	$15.66
Bill & Account Collectors	0.94	52	0	$15.46
Billing & Posting Clerks	1.03	83	13	$17.04
Bookkeeping, Accounting & Auditing Clerks	0.85	235	22	$19.38

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Payroll & Timekeeping Clerks	0.76	21	2	$12.73
Tellers	0.57	45	(5)	$16.01
Court, Municipal & License Clerks	0.79	17	0	$15.73
Customer Service Representatives	0.79	318	34	$14.00
File Clerks	0.68	17	0	$12.91
Interviewers, Except Eligibility & Loan	0.74	25	2	$10.68
Library Assistants, Clerical	0.56	11	(1)	$15.57
Loan Interviewers & Clerks	0.38	13	0	$14.09
Order Clerks	0.51	15	1	$17.44
Human Resources Assistants, Except Payroll & Timekeeping	0.80	18	1	$12.48
Receptionists & Information Clerks	1.72	282	62	$15.26
Information & Record Clerks, All Other	1.69	52	(2)	$15.42
Police, Fire& Ambulance Dispatchers	0.78	12	(1)	$17.27
Dispatchers, Except Police, Fire & Ambulance	0.60	19	2	$24.72
Postal Service Mail Carriers	0.80	37	(7)	$23.29
Postal Service Mail Sorters, Processors & Processing Machine Operators	1.06	19	(4)	$20.25
Production, Planning & Expediting Clerks	0.52	25	3	$12.87
Shipping, Receiving & Traffic Clerks	0.74	78	7	$10.84
Stock Clerks & Order Fillers	1.30	381	40	$22.98
Executive Secretaries & Executive Administrative Assistants	0.87	101	3	$19.64
Legal Secretaries	0.50	16	0	$14.63
Medical Secretaries	1.03	87	19	$15.89
Secretaries & Administrative Assistants, Except Legal, Medical & Executive	0.92	381	28	$16.12
Computer Operators	1.06	11	(1)	$13.76
Data Entry Keyers	0.57	19	(2)	$16.91
Insurance Claims & Policy Processing Clerks	0.75	31	4	$12.00
Mail Clerks & Mail Machine Operators, Except Postal Service	0.65	11	(1)	$12.61
Office Clerks, General	0.79	403	38	$18.49
Office & Administrative Support Workers, All Other	0.28	15	(1)	$12.26
Farming, Fishing & Forestry Occupations	**0.12**	**22**	**(20)**	**$12.42**
Farmworkers & Laborers, Crop, Nursery & Greenhouse	0.12	14	(17)	$26.70

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Construction & Extraction Occupations	**1.13**	**1,233**	**178**	**$17.98**
First-Line Supervisors of Construction Trades & Extraction Workers	1.35	135	18	$16.44
Carpenters	0.90	147	(7)	$16.48
Cement Masons & Concrete Finishers	0.50	13	2	$14.39
Construction Laborers	1.72	340	78	$18.29
Paving, Surfacing & Tamping Equipment Operators	1.34	12	Insf. Data	$19.96
Operating Engineers & Other Construction Equipment Operators	1.60	93	29	$15.84
Drywall & Ceiling Tile Installers	0.63	12	(2)	$20.85
Electricians	1.01	103	11	$14.09
Painters, Construction & Maintenance	0.67	43	(6)	$16.90
Pipelayers	2.79	25	9	$21.68
Plumbers, Pipefitters & Steamfitters	1.56	107	26	$13.33
Roofers	0.46	11	(7)	$17.97
Sheet Metal Workers	0.91	20	1	$12.24
Helpers–Electricians	1.69	19	3	$12.81
Helpers–Pipelayers, Plumbers, Pipefitters & Steamfitters	2.95	26	8	$23.84
Construction & Building Inspectors	0.74	11	0	$21.36
Earth Drillers, Except Oil & Gas	4.66	16	Insf. Data	$27.47
Installation, Maintenance & Repair Occupations	**0.85**	**779**	**103**	**$18.49**
First-Line Supervisors of Mechanics, Installers & Repairers	0.82	58	7	$15.19
Computer, Automated Teller & Office Machine Repairers	0.77	17	(1)	$22.32
Telecommunications Equipment Installers & Repairers, Except Line Installers	0.31	10	(1)	$20.46
Automotive Body & Related Repairers	1.86	47	9	$16.91
Automotive Service Technicians & Mechanics	1.13	137	21	$19.49
Bus & Truck Mechanics & Diesel Engine Specialists	0.75	30	5	$19.69
Mobile Heavy Equipment Mechanics, Except Engines	0.65	13	2	$11.44
Tire Repairers & Changers	1.56	26	8	$21.01
Heating, Air Conditioning & Refrigeration Mechanics & Installers	1.76	86	18	$19.58
Industrial Machinery Mechanics	0.53	27	6	$16.97
Maintenance & Repair Workers, General	0.82	183	18	$11.13
Helpers–Installation, Maintenance & Repair Workers	1.17	24	4	$15.09
Installation, Maintenance & Repair Workers, All Other	0.82	23	3	$24.29

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Production Occupations	**0.47**	**684**	**151**	**$15.08**
First-Line Supervisors of Production & Operating Workers	0.58	55	10	$15.61
Electrical & Electronic Equipment Assemblers	0.54	17	(2)	$13.33
Team Assemblers	0.42	77	12	$10.24
Bakers	1.10	32	9	$12.07
Butchers & Meat Cutters	1.30	28	5	$17.80
Machinists	0.61	39	15	$16.16
Welders, Cutters, Solderers & Brazers	0.58	37	5	$9.36
Laundry & Dry-Cleaning Workers	0.76	25	(1)	$18.74
Water & Wastewater Treatment Plant & System Operators	0.63	11	0	$15.12
Mixing & Blending Machine Setters, Operators & Tenders	1.22	24	13	$16.26
Inspectors, Testers, Sorters, Samplers & Weighers	0.34	27	5	$12.05
Ophthalmic Laboratory Technicians	6.70	30	19	$12.54
Packaging & Filling Machine Operators & Tenders	0.48	29	12	$20.75
Painters, Transportation Equipment	1.22	11	Insf. Data	$11.07
Helpers–Production Workers	0.29	19	4	$13.24
Production Workers, All Other	0.39	14	3	$22.53
Transportation & Material Moving Occupations	**0.73**	**1,130**	**143**	**$14.55**
First-Line Supervisors of Helpers, Laborers & Material Movers, Hand	0.64	18	3	$25.14
First-Line Supervisors of Transportation & Material-Moving Machine & Vehicle Operators	0.71	23	4	$17.50
Bus Drivers, Transit & Intercity	0.65	17	(1)	$11.20
Bus Drivers, School or Special Client	2.35	179	(26)	$12.25
Driver or Sales Workers	1.18	79	29	$18.00
Heavy & Tractor-Trailer Truck Drivers	0.59	171	52	$14.99
Light Truck or Delivery Services Drivers	0.72	96	12	$9.71
Taxi Drivers & Chauffeurs	0.56	23	(3)	$31.74
Locomotive Engineers	2.43	16	3	$29.71
Railroad Conductors & Yardmasters	2.31	18	4	$9.04
Parking Lot Attendants	0.81	18	Insf. Data	$9.74
Automotive & Watercraft Service Attendants	0.74	12	1	$13.62
Industrial Truck & Tractor Operators	0.59	49	10	$10.13
Cleaners of Vehicles & Equipment	0.55	31	1	$11.53

Occupation	LQ	2015 Jobs	2010–2015 Change	Avg. Hourly Earnings
Laborers & Freight, Stock & Material Movers, Hand	0.58	225	26	$10.16
Packers & Packagers, Hand	0.82	92	15	$16.45
Military occupations	**0.57**	**179**	**0**	**$16.45**

Source: EMSI 2nd Quarter 2015, Garner Economics

APPENDIX F: FAYETTEVILLE GEOGRAPHY BY FIGURE AND TABLE

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Figure	Subject	Geography used for Fayetteville	Base Data
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Table	**Subject**	**Geography used for Fayetteville**	**Base Data**
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Table 2	Annual rate of Population Change	City Limits	US Census Bureau, Population Estimates
Table 3	Previous Locations of Residents	City Limits	US Census Bureau, American Community Survey
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Table 8	SAT Scores	Fayette County High School	Georgia Department of Education, Area School Districts
Table 9	Graduation Rates	Fayette County High School	Georgia Department of Education, Area School Districts

Table	Subject	Geography used for Fayetteville	Base Data
Table 10	Population In-Migration by Educational Attainment	City Limits	US Census Bureau, American Community Survey
Table 11	Median Earnings by Educational Attainment	City Limits	US Census Bureau, American Community Survey
Table 12	Worker Flows	City Limits	US Census Bureau, American Community Survey, LHD
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Table 16	Per Capita Income	City Limits	US Census Bureau, American Community Survey
Table 17	Self-Employment	City Limits	US Census Bureau, American Community Survey
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Table 19	Employment Status (Labor Force Participation Rates)	City Limits	US Census Bureau, American Community Survey
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Table 32	Industry Relative Components of Growth	Zip codes 30214 and 30225	EMSI
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APPENDIX G: ASSETS & CHALLENGES ENDNOTES

[1] Within 400 miles of over 57 million people
[2] Ibid
[3] Hartsfield-Jackson International Airport is 18 miles away.
[4] Ibid
[5] Falcon Field is located in Peachtree City (Fayette County).
[6] See data on broadband on page 60.
[7] LQ 0.54, EMSI 2015
[8] LQ 0.77, EMSI 2015
[9] LQ < .50, EMSI 2015
[10] LQ >1.50, EMSI 2015
[11] *2010–2015 Change in Estimated Average Weekly Wages*
(Highest Relative Number Shaded)

	2015	20010–2013	
		$	%
Fayetteville	$719	$26	3.70%
Woodstock	$694	$62	9.85%
Opelika	$604	$8	1.28%
Fayette County	$734	$6	0.77%
Georgia	$904	$69	8.32%
United States	$964	$78	8.76%

Source: US Census Bureau, Garner Economics
[12] Southern Technical Community College is located in Griffin.
[13] Georgia Military College, Fayette Campus; Multiple higher education institutions within a 30-to 45-minute drive.
[14] However, Georgia Tech is less than 45 minutes away.
[15] 2.5 FTEs
[16] The City's community development department, which serves as the de facto economic development department, has a budget of $275K. This is significantly below Opelika and the average benchmark in the southeast of $500K for a community the size of Fayetteville.
[17] 771,830 sq. ft. gross inventory with a 3% vacancy, per City of Fayetteville
[18] 1.5 million sq. ft. gross inventory with 207K sq. ft. available. A 13.23% vacancy rate.
[19] 3.9 million sq. ft. gross inventory with 385K sq. ft. available. A 9.91% vacancy rate. (Source: City of Fayetteville, Community Development Department)
[20] IRB financing is available through the FCDA.
[21] Primary offered through local banks and state programs, e.g., the Georgia Cities Foundation Revolving Loan Fund
[22] Primary offered through local banks and state programs, e.g., the Georgia Cities Foundation Revolving Loan Fund
[23] Water demand is currently at 1.2 MGD and capacity equals demand. There are efforts underway to increase capacity by nearly double the current capacity.

[24] Wastewater demand is 2.124 MGD and capacity is 5.0 MGD.
[25] Local and state incentives are primarily noted and managed by the Fayette County Development Authority, with some Main Street incentives facilitated by the City Downtown Development Authority.
[26] Georgia's Quick Start program is considered one of the best labor training programs in the United States.
[27] *2015 SAT Scores*
(Highest Score Shaded)

	% Taking Test	Composite
Fayette County High School	56%	1379
Fayette County School District	74%	1537
Cherokee County School District (Woodstock)	59%	1560
Lee County School District (Opelika)	60%	1419
Georgia	77%	1450
United States	50%	1490

Source: Georgia Department of Education, Fayette County School District, Cherokee County School District, Lee County School District, The College Board, Garner Economics
[28] The City has a lower millage than many in Georgia (including Woodstock and PTC), but the County has a high property tax rate. http://dor.georgia.gov/sites/dor.georgia.gov/files/related_files/document/LGS/Property%20Tax%20Digest/2014%20mill%20rate.pdf
[29] 113 listing in excess of $300K in ZIP code 30214, Zillow.com
[30] 94 listing from $150,000-299,999, IBID
[31] 34 available rentals, Apartments.com
[32]

2015 Cost-of-Living Index

	Composite	Grocery	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Fayetteville-Fayette County	93.4	100.9	79.9	88.0	94.7	105.2	101.6
Auburn-Opelika	95.5	103.3	79.3	93.0	91.3	87.9	109.8

*Woodstock—data not available. Fayette County & Georgia 2013 data.

[33] Crime rates per 10,000 residents (Highest Relative Figure Shaded)

	Fayetteville, GA	Woodstock, GA	Opelika, AL	Fayette County	Georgia	United States
Violent	16	12	64	8	38	37
Property	281	234	555	144	328	260

Source: FBI Uniform Crime Reports, Fayette County Georgia Office of the Sheriff, Garner Economics
[34] Numerous performing and participatory activities based on the population size of Fayetteville, e.g., Southern Ground Amphitheatre
[35] No City Parks and Rec department. Deferred to the County.
[36] Fayette Pavilion Shopping Center offers 1.5 million sq. ft. of space.
[37] Piedmont Fayette Hospital is highly ranked and has a cancer care affiliation with MD Anderson Clinic. It is the city's largest employer.
[38] Only one AAA three-star rated property.