



Four Oaks, North Carolina

Report of
Economic Development Assessment
January 2020



January 13, 2020



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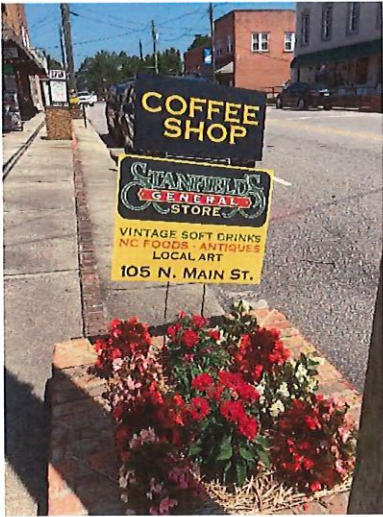
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Section 1. Introduction



Four Oaks is a town in Johnston County, North Carolina. As of the 2010 census the population was 1,921 – a 25% increase from 2000. The 2019 estimated population was 2,208.

The Town of Four Oaks was incorporated in 1889, following the completion of the Seaboard Coast Line Railroad in 1886. Named for four oak tree sprouts growing from a stump, the new town had a population of 25, a post office, a public gin, grist and sawmills, a saloon, general store and a church.

The Four Oaks Commercial Historic District was listed on the National Register of Historic Places in 2006.

Four Oaks is in central Johnston County, southwest of Smithfield, the county seat. The town limits extend northeast to Holts Lake on Black Creek, a tributary of the Neuse River. U.S. 301, referred to locally as Wellons Street, is the main road through the town, leading northeast 7 miles to Smithfield and southwest 8 miles to Benson. I-95, runs parallel to US 301, and passes the southeast corner of Four Oaks, with access from Exit 87.

According to the United States Census Bureau, the town of Four Oaks has a total area of 1.6 square miles

Recent development includes distribution centers for BD (Becton-Dickinson) in the Four Oaks Business Park and the incoming Ashley Furniture along I-95. Other major industry includes House-Autry Mills, manufacturer of corn meal and seasoned breading mixes and May-Craft Boats.

High performing organizations are those that learn to anticipate and adapt to change by creating value for those served, and motivation and meaning for those who serve them. The best tool for accomplishing these objectives is strategic planning.

The Town of Four Oaks invited the *NC Main Street & Rural Planning Center* to assist in the development of this *Four Oaks Economic Development Assessment*. The assessment efforts started with the collection of demographic and market data. Information from this Assessment will be incorporated in the 2020 *Downtown Revitalization Plan*.

Local Work Group Engagement

A Local Work Group met for a full morning and early afternoon workshop on October 22, 2019. Comprised of prominent local business owners, planning and economic development board members, Chamber of Commerce officials, and others, the work group discussed issues facing the Town as well as identifying its assets, economic drivers, strengths, challenges, opportunities and threats.

Economic Positioning/Vision Forum Public Engagement

The Forum was open to the public at-large and was held at the First Baptist Church fellowship hall on November 19, 2019. Forty-two (42) members of the public representing citizens, businesses, and property owners participated in the development of the following economic positioning and vision statement to be used as a focal point in the development of goals, objectives, and actions resulting from the process.

Implementation

The *Four Oaks Economic Development Assessment Implementation Plan* has a time horizon of 12 to 18 months. The implementation plan provides strategic direction with suggested goals, objectives, and actions to be implemented by the Town of Four Oaks. The goals, objectives, actions, and tasks identified in the plan are defined as follows:

- **GOALS:** are general guidelines that explain what the community wants to achieve. They are usually long-term and represent broad visions for the future.
- **OBJECTIVES:** define strategies or implementation steps to attain identified goals. Objectives are specific and measurable and may have a completion date.
- **ACTIONS:** are a series of steps a community takes to implement a specific objective or strategy.
- **TASKS:** are a list of steps to achieve an action, usually achievable within a one-year time frame. (Note: The plan does not include tasks as these will be developed by the individuals or groups responsible for implementing the specific actions).

Monitoring and Evaluation:

Constant evaluation of the goals, objectives and actions is necessary to ensure follow-through on the implementation of the plan. Such efforts ensure that strategic plans remain living documents that are relevant to the community.

In addition to internal efforts to implement the plan, the Town will work with economic development partners such as the *NC Department of Commerce, Johnston County Economic Development, Triangle J Council of Governments, and other community partners* to leverage resources and capacity. The collaboration between Town resources, contracted economic development services and external partners will increase accountability to achieve desired outcomes for a diverse, thriving economy while maintaining the small-town charm that drives the quality of life.

Section 2. Local Work Group Engagement



Description

The public engagement in this process was held on October 22, 2019 with a Local Work Group. The Group, comprised of key community stakeholders, were led through a series of activities facilitated by Main Street and Rural Planning Center staff (NC Commerce). Specifically, the group identified economic drivers, community assets, was presented with a brief economic snapshot of Four Oaks and led through a SWOT Analysis (*Strengths, Weaknesses, Opportunities and Threats*). Following

lunch, a number of the group members, as well as other community stakeholders and residents, were interviewed one-on-one for additional information. The key Community Assets that were identified are below and the top issues: strengths, weaknesses, opportunities and threats follow.¹

Key Community Assets²

Economic Assets	Cultural Assets	Natural/Recreational
Agricultural/Farming Community	Acorn Festival	All Out Bikes
Ashley Home Furnishings Distribution	Art Gallery	Barbour Grove Park
Banks	Chamber events	Battleground-Bentonville (15 miles)
Becton-Dickinson	Christmas Celebration	Civitan & Town Sports
Business Park (Industrial)	Churches	Civitan Park
Chamber of Commerce	Library	Civitan Sports
CommHealth Call Center	Historic District	Four Oaks Gym (fitness Center)
Downtown District/Businesses	Hispanic bakery	Greenway (future)
Historic District / homes	Railroad heritage	Howell Woods
House-Autry Mills	Music @ Stanfield's	Sunflowers/wildflowers along I-95
MayCraft Boat Builders	Special Events	Town Parks

Institutional	Community	Government
American Legion	4-H	Emergency services
Banks/ATM's	American Legion	Free parking
Barbour's Grove Park	CommHealth & Horizon Health	Library
Boy & Girl Scouts	EMS	Town Government
Churches	Chamber of Commerce	Water & Sewer
Daycare	Churches - variety	Town staff likes their jobs!
EMS	Church Youth Groups	Town Hall
Fire Department	Civitan	Police Department
Four Oaks-Benson News in Review	Four Oaks Recreation	US Post Office
Schools	Rotary Club	

¹ Categories were determined by type of comment made during the Economic Positioning/Vision Forum and Assessment Workshop

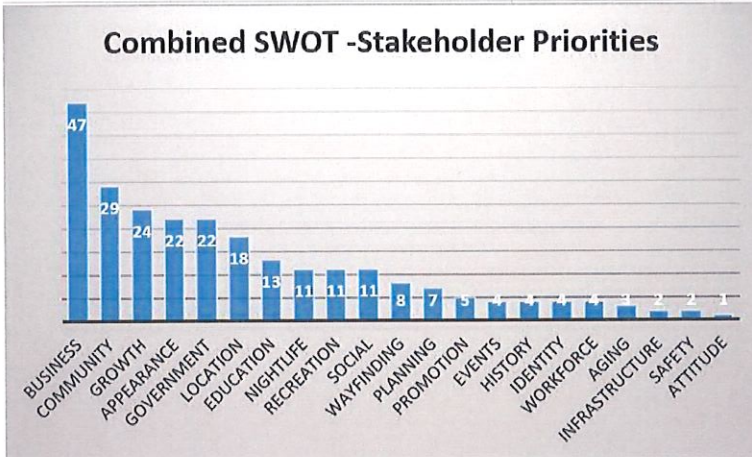
² See full list of Community Assets in Appendix 2

Economic Drivers

Current: House Autry Mills, Becton-Dickinson, MayCraft Boat Builders, and Ray's Appliances

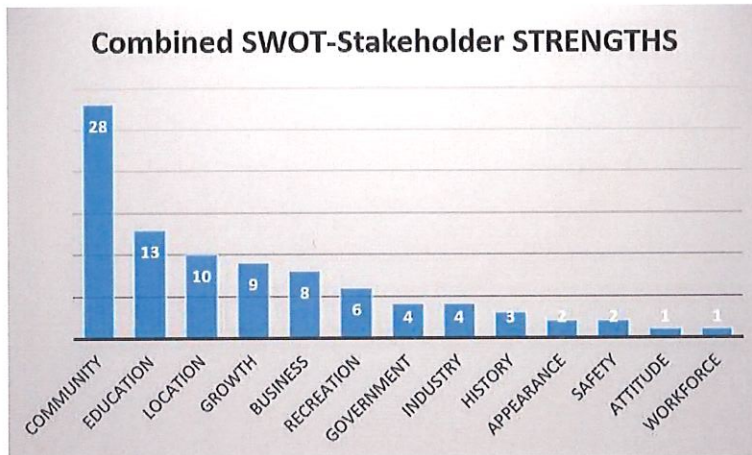
Future: Ashley Home Distribution Center and CommHealth Call Center, both of which are expected to be operational in 2020.

Additionally, Four Oaks' location at I-95's Exit 87 and US 301 are literal economic drivers.



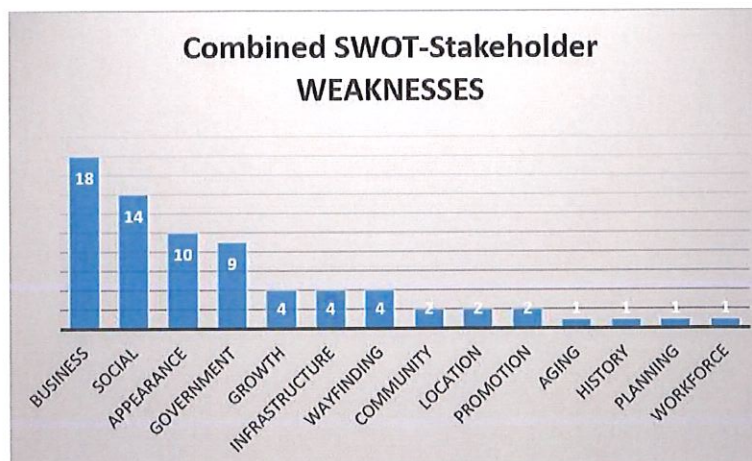
SWOT-Stakeholder Top 5 Priority Community Issues

- 1) Business
- 2) Community
- 3) Growth
- 4) Appearance
- 5) Government



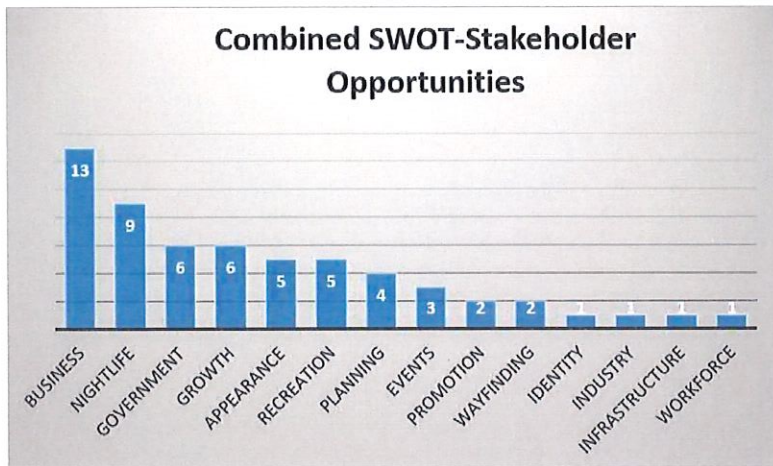
SWOT-Stakeholder Top 5 Community Strengths³

- 1) Community
- 2) Education/Schools
- 3) Location
- 4) Growth
- 5) Business



SWOT-Stakeholder Top 5 Community Weaknesses⁴

- 1) Business
- 2) Social
- 3) Appearance
- 4) Government
- 5) Growth/Infrastructure/
Wayfinding (tie)



SWOT-Stakeholder Top 5 Community Opportunities⁵

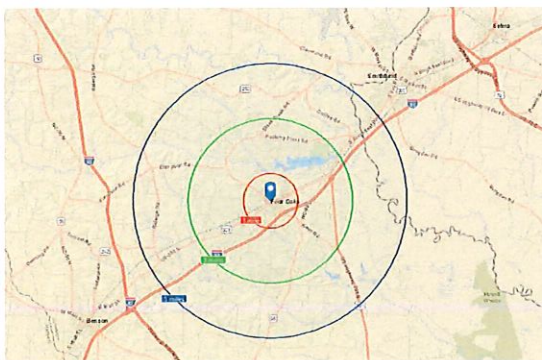
- 1) Business
- 2) Nightlife
- 3) Government/Growth (tie)
- 4) Appearance/Recreation (tie)
- 5) Planning

Common Threats Identified

- Fear of Uncontrollable Growth
- Citizens who Resist Change
- Town Codes and Ordinances
- I-95 Construction

The full lists of Four Oaks' identified Economic Drivers, Community Assets, Strengths, Weaknesses, Opportunities and Threats (SWOT) and Stakeholder comments are found in Appendix 2 of this Assessment Report.

Radius	Retail MarketPlace Profile Four Oaks NC	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Leakage)	Leakage/ Surplus Factor	Number of Businesses
1 Mile	Total Retail Trade and Food & Drink	\$31,486,781	\$27,291,716	\$4,195,065	7.1	18
3 Miles	Total Retail Trade and Food & Drink	\$72,653,279	\$50,091,548	\$22,561,731	18.4	33
5 Miles	Total Retail Trade and Food & Drink	\$138,776,660	\$74,734,328	\$64,042,332	30.0	49



Potential Retail Leakage Opportunities (general)⁶

- Building Material & Supplies \$6.2 M (expansion)
- Other Miscellaneous Stores \$3.2 M
- Furniture Stores \$2.7 M
- Health & Personal Care \$5 M
- Restaurants/Other Eating Places \$5.1 M

1-Mile Trade Area (Red)
 3-Mile Trade Area (Green)
 5-Mile Trade Area (blue)

⁵ See full list of Community Opportunities in Appendix 2

⁶ See full Retail Market Analysis in Appendix 3

Section 3. Economic Positioning/Vision Forum Public Engagement



Photo courtesy of the Four Oaks-Benson News in Review

Visioning is the process of developing consensus about what future the community wants, and then deciding what is necessary to achieve it.

A community economic positioning/vision statement is one of the elements needed to form a forward-looking strategic framework that provides local government boards/commissions the long-term and comprehensive perspective necessary to make disciplined, tactical and incremental decisions on community issues as

they arise.

On November 19, 2019, an Economic Positioning/Vision Forum was held in the Four Oaks First Baptist Church fellowship hall to identify a community-wide vision of the economic future of Four Oaks. This meeting was open to all residents, business owners, and interested parties. In total, forty-two (42) Four Oaks residents and business/property owners participated in the *Economic Positioning/Vision Forum*. Placed into six (6) teams, the participants identified economic drivers, strengths, weaknesses and opportunities and each team developed an economic positioning/vision statement that was shared with the whole group. From those statements the following is Four Oaks' economic positioning/vision statement:

Economic Vision Statement

Four Oaks, a gateway to North Carolina's Capitol and coast, is an oasis of hospitality centered between Boston and Miami on I-95. Downtown is a center for creative local artisans with destination businesses, community events and social activity. Four Oaks is home to industry, business, family and an authentic heritage as deep as the roots of our Four Oaks trees.

Strategic Goals

Two (2) strategic goals were developed from this economic positioning/vision statement. An Implementation Plan was developed based on these strategic goals. The Implementation Plan (contained in Section 4 of this report) represents short-term actions which may be taken to advance the Town towards this desired community vision.

Strategy/Goal 1: – Create an Environment for Downtown Vibrancy

Strategy/Goal 2: – Create an Oasis of Hospitality

Section 4: Four Oaks Economic Development Assessment Implementation Plan FY2020

Vision: Four Oaks, a gateway to North Carolina’s Capitol and coast, is an oasis of hospitality centered between Boston and Miami on I-95. Downtown is a **hub** for creative local artisans with destination businesses, community events and social activity. Four Oaks is home to industry, business, family and an authentic heritage as deep as the roots of our Four Oaks trees. *[draft 12-17-19]*

Strategic Goal #1: Create Environment for Downtown Vibrancy	Strategy Area #2: Create an Oasis of Hospitality
<p>Downtown Four Oaks has some great buildings, layout and history – aka authenticity, which is very marketable. The Town of Four Oaks recognizes the importance of a successful, vibrant downtown district by the adoption of three overlay districts that connect to downtown from I-95. Downtown is where most of the Town’s events occur, Town business is transacted, and is home to a number of interesting and unique businesses. But it lacks foot traffic and consistent activity. Available buildings, recruitment of experiential and social businesses such as restaurants, breweries, and unique retail will create an active downtown.</p>	<p>Four Oaks should aspire to attract the <u>most innovative and best road services, food, travel amenities and hospitality anywhere along I-95</u>. An “oasis of hospitality” does not stop at the road’s edge – the ethos carries through all of Four Oaks – from I-95 to Downtown through US 301. Business owners, managers and employees all carry the banner for the community and provide pleasant, helpful service to all customers and other businesses. Visitors and travelers are easily led from the highway to downtown through a well-designed, uniquely authentic and inviting commercial corridor.</p>
<p>Objective 1.1: Organize a Downtown Advisory Committee or non-profit downtown organization, based on the Main Street® model in 3rd quarter FY20.</p> <p>Action 1.1A: Develop bylaws (operating rules) for the committee or non-profit Action 1.1B: Appoint Committee members or elect a board of directors Action 1.1C: Begin organizational training of Committee/board members Action 1.1D: Develop a 1-2 year plan of work</p>	<p>Objective 2.1: Develop a small area (gateway) plan for Exit 87 providing development guidance and access to downtown by 2nd quarter FY21</p> <p>Action 1.A: Research innovative travel services and types to recruit to Four Oaks Action 1.B: Initiate discussions with Joco EDC, NCDOT & Joco Tourism Action 1.C: Engage firm to assist with small area/gateway planning at Exit 87 (include MSRPC)</p>
<p>Objective 1.2: Increase downtown foot traffic and business sales by 5% at end of December 2021</p> <p>Action 1.2A: Create building inventory to track square footage, occupancy, vacancies, etc. of downtown district Action 1.2B: Create business inventory (as part of building inventory) to track business contact info, business mix, etc. Action 1.2C: Develop a communication plan (tool) to inform residents and businesses of activities, events, sales, etc. in downtown. Action 1.2D: Develop regional/statewide downtown promotion plan to promote activities and business types.</p>	<p>Objective 2.2: Introduce hospitality ethos throughout Town beginning 4th quarter FY20</p> <p>Action 2.1: Work with Joco Tourism & Downtown Committee to develop a town-wide hospitality program Action 2.2: Create scholarships, if necessary, for smaller businesses Action 2.3: Provide Hospitality training for all businesses, agencies and companies</p>

APPENDIX 1. Acknowledgements

North Carolina Department of Commerce
www.nccommerce.com

The North Carolina Department of Commerce is the state's lead agency for economic, community and workforce development. The Department works with local, regional, national and international organizations to fulfill its mission to improve the economic well-being and quality of life for all North Carolinians.

Taking a comprehensive approach to economic development, the Department's work reaches many areas. The Department helps people find jobs and employers find and retain a qualified workforce. The Department administers the state's employment security system, supporting workers during career transitions. The Department provides local communities with grants and planning services to spur infrastructure development and economic growth and administers the state's economic incentive programs.

The Department is also responsible for recruiting companies to the state, helping existing North Carolina companies expand, encouraging business start-ups, enabling companies to export, and marketing North Carolina as a business and visitor destination. In October 2014, the Department entered a contract with a new public-private organization, the Economic Development Partnership of North Carolina (www.edpnc.com) to take the lead in these recruitment and marketing functions.

The Department also publishes data, statistics, information and reports for citizens and policymakers interested in the state's economy.

The Department of Commerce, an executive branch agency of the State of North Carolina, is headquartered in Raleigh.

The NC Main Street & Rural Planning Center

The *NC Main Street and Rural Planning Center* (MS&RPC) is part of the NC Department of Commerce, the state's lead agency for workforce, community, and economic development. In this capacity, the Center provides downtown revitalization and planning assistance to communities across the state, primarily in economic development planning.

The Center has offices throughout the state, in the West (Asheville and Sylva), Northwest (N. Wilkesboro), the Piedmont (Winston-Salem), Southwest (Albemarle), North Central (Raleigh and Wilson), South Central (Fayetteville) and the East (Washington, Jacksonville, and Wilmington).

Recognizing that economic prosperity is the number one priority in most communities, our experienced staff partners with community leaders to add value to their economic development efforts through a variety of services and assistance.

Whether rural communities are planning future economic expansion, injecting life into existing structures, or developing in an economically challenged area, the MS&RPC staff can help attain those goals through targeted assistance with these services:

- > Economic Development Assessment
- > Strategic Economic Development Planning
- > Implementation Services
- > Local & Regional Market Analysis
- > Small Area Planning for High Impact Areas
- > GIS & Custom Mapping

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Barbara Keen

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Mike Pritchett
Ron Sloan
Anita Stephenson

Four Oaks Town Commissioners
Linwood Parker, Mayor
Andy Hardy
John Hatch

Mike Hines
Vic Medlin
Carles Surles

The Rural Planning Team would like to thank the **Local Work Group** members who generously gave up a full morning and an early afternoon to work with us through this process as well as other stakeholders* who were also interviewed during the afternoon:

Donna Bailey-Taylor	John Norman
Patricia Chisholm-Jones	Linwood Parker
Carly Fogleman	Joan Pritchett
Pauline Ketchum	David Stanfield

We offer this report as a working document to guide you through the on-going activity of successfully implementing the recommendations found in this *Four Oaks Economic Development Assessment*. The residents of Four Oaks have a keen sense of community pride. We hope this report inspires the community to support the economic development efforts of the Town of Four Oaks.

Appendix 2. Assessment Input

Community Assets Four Oaks 10/25/19 & 11/19/19

Economic Assets	Cultural Assets	Natural/Recreational
Adjacency to military bases (Ft Bragg)	Acorn Festival	All Out Bikes
All Out Bicycles	Art Gallery	Barbour Grove Park
Ashley Home Furnishings Distribution	Barbara Keen's (art)	Battleground - Bentonville (15 mi)
Banks	Bentonville Battlefield	Civitan & Town Sports
Becton-Dickinson	Car Show	Civitan Park
Bentonville Battlegrounds (15 miles)	Chamber events	Civitan Sports
Business Park (Industrial)	Christmas Celebration	Cotton fields
Buzzy Bees	Churches	Four Oaks Gym (fitness Center)
Camp Flintlock	Faith-based community (7 church)	Greenway (proposed)
Carley Fogel Photography	Hispanic bakery	EMS
Chamber of Commerce	Historic district	Fire Department
Cleo's	Howell Woods	Gym
Commonwealth Call Center (future)	Library	Holt Lake (private)
Downtown businesses	Multi-cultural Fair - Four Oaks El	Fire Dept.
Farmers Market	Photography (studio)	Fire Dept.
Farming/Agriculture community	Railroad heritage	Howell Woods
Four Oaks Business Park	Special Events	Kiddie Park (2)
Four Oaks Interiors	Third Thursday	Parks & Recreation
Four Oaks Restaurant	Thursday music at Stanfield's	Parks (3)
Historic District	Town Founded 1889 (history)	Potential bike/walking trails
Historic Homes	Trivia Nights	Road races
Holt Lake Subdivision		Soccer/Sports
Home Décor-OGI, Ashley, Cabinets		Streets for walking
House-Autry Mills		Sunflowers/wild flower fields along I-95 (private seed company)
Howell's Woods		Town parks
I-95/US 301/I-40		Tucker Lake
Local Retail Business		Walking trails
Maycraft (boat builder)		
Medical facilities		
OGI Designs		
Old Time Grill		
Public Schools		
Railroad (no stop aficionado attraction)		
Raleigh RV Park		
Ray's Appliances		
Restaurants		
Retail		
Roadside produce stands		
Stanfield's General Store		
Stanley House		
Strip mall		

Economic Drivers Four Oaks 11-19-19	
Accounting offices	Extraterritorial Jurisdiction
Acorn Festival	Farming/Agriculture community
Adjacency to military bases (Fort Bragg)	Florist
All Out Bikes	Four Oaks Business Park
Already have some great established downtown businesses	Four Oaks Elementary School
Artisans	Four Oaks Interiors
Arts/crafts	Four Oaks Middle School
Ashley Furniture (added jobs-daytime population)	Four Oaks Restaurant
Auto body repair shops	Four Oaks Senior Living
Auto parts stores	Four Oaks Small Engines
Auto repair shops	Funeral home
Available housing/land	Gas stations
Bank - KS Bank	Gigi - nails
Bank - United	Great school system
Barbara Keen	Grocery stores, variety
Becton-Dickinson plant	Grove
Bentonville Battlegrounds (15 miles away)	Gym
Bentonville Disciple Church	Hardware store
Bicycle path?	Health care facilities
Black Creek Arsenal	Historic District
Business Park with room for growth	Holt Lake Subdivision
Cabinet shops (2) Trades	Holt Lake West - out of town subdivisions
Camp Flintlock	Home cooking restaurants
Car sales	Home Décor - OGI Design, Ashley, Cabinet shops
Carley Fogel Photography	Horizon Family Medicine
Carlie C's grocery store	Horizon Health
Center of Johnston County	Hospital - Commwell Health Center
Central location to beaches and mountains	House-Autry Mills
Certified Retirement Community (Johnston County 1st county to be recognize)	Howell Woods
Chamber of Commerce	Industrial park
Christmas celebration	Institutional entities within 50 to 100 mile radius
Churches	Insurance offices
Civitan Sports	Keene Memorials
Cleo's	Laundry mat
Close to major universities	Library
CommWell Health (added jobs-daytime population)	Local school system
Cost of living	Location (I-95/I40/ US 301)
CPA firms	Lower cost of living
Dollar General	Lower cost of living

Economic Drivers Four Oaks 11-19-19 (Continued)

Drug stores	McDonalds
Dunns Gas & Grocery	Medical - CommWell Health
Exit 87	Medical - Horizon Medical
RV Parks	Nutrina
School - South Johnston High School	OG/Furniture stores
Schools - Elementary	OGI Designs
Schools - Middle	Old Time Grill
Shamrocks Busy Bee	Photography Studio
Small town atmosphere	Pipeline (proposed)
Social Media influencers	Pre-schools - waiting list
Stanfield's General Store	Professional services
Stanley House	Railroad (no stop but affionado attraction)
Stores downtown, variety	Raleigh RV Park
Strip mall shops	Ray's Appliances
Strong emergency services (EMS, Fire, Police)	Recreation - Civitan, Kiddie Park, Barbour Park, Pool)
Strong family/community	Research hospitals within proximity
Subdivisions	Residents
Thrift Store	Roof repair
Tired Iron Classics	Room for growth
Veterinarians/Boarding	Room for more housing/neighborhoods (land)
Visual Impressions of Main Street	
Water-sewer	

Four Oaks SWOT Analysis
10/29 & 11/19/19

Strengths	
Affordable property	Legacy families
Attractive downtown	Local business
Banks	Location - I-95/I-40/US 301/NC 210 (5 mentions)
Bike (Friendly)	Low cost of living
Buildings - Main Street	Neighborhood
Business park (3 mentions)	New people adopt town
Chamber	Our people
Churches (3 mentions)	Parks & Recreation
Community events	People-village (2 mentions)
Community leadership /engagement	Pool-community
Community spirit (2 mentions)	Preschool
Cost of living	Railroad - highest elevation from Maine to Florida
Demography location	Safety
Educated population	Schools (5 mentions)
Emergency services	Service industries - customer service
Grocery store	Small town atmosphere (5 mentions)
Half-way between New York & Miami	Tax revenue from Big businesses
Historic district	Unique shops (hand-crafted items)
History/heritage	Up and coming Chamber of Commerce
Johnston Community college	Walkable (2 mentions)
Land availability	Welcoming
Weaknesses (Challenges)	
Aging infrastructure and buildings	Lack of restaurants
Aging population / lack of senior center	Lack of signage
Lack of awareness of town regulations	Lack of skilled labor
Better/more wayfinding signs on I-95	Limited assisted living
Business turnover	Limited dining choices
Lack of business-ready buildings	Local support: Need to be more welcoming/open to outsiders
Clarity of roles between agencies (Town/Chamber/Business)	Locals don't shop local
Lack of communication between Town/residents	Marketing
Community events	Money being spent elsewhere
Community spirit	gateway improvements (2)
Cost of revitalization to meet codes	No natural gas
Critical mass of population	No place for teenagers
Empty storefronts	No welcome signs
Exposed utility lines	Not much shopping
Eyesores - Automotive and Appliance store	Property investors
Lack of Fine arts	Renters don't get same information (as property/homeowners)

Lack of full service restaurants	Retail
Gateway/Entry appearances	Senior Center
Industry	Signage (wayfinding)
Internet speed (slow)	Small town sandwiched between larger towns
lack of café's	Storefronts empty / used as storage
Lack of entertainment	Too many dilapidated houses
Lack of entertainment	Too many empty stores
Lack of foot traffic on Main Street	Traffic management
Lack of identity	Train noise
Lack of interest in progress	Trained/skilled workforce
Lack of investment in the town	Visibility from I-95
Lack of restaurant and bar	

Opportunities	
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Add music, lightposts for ambience	I-95 construction (reroute traffic through downtown)
Bike / walking trails	Identify & target new businesses and subsidize if necessary
Brewery/pub	Information / directional signs on I-95
Business growth	Market Days
Business park	Marketing
Communication between Town and Public	Money being spent elsewhere
Community gathering businesses	Movie Night in the Grove
Create a brand	New businesses - partnerships
Create skilled labor - Johnston Community College	New businesses near furniture store
Decorate storefronts	New residents
Dog park behind McDonald's	Nightlife/entertainment
Downtown dining	Open storefronts on Main St
Draw more traffic off I-95	Outdoor concerts
East Coast Greenway	Property & Retail investment
Entertainment	Recreational area for teenagers
Entertainment/live concerts	Residential growth
Establishments open later	Revitalize downtown
Events / digital media coordinator position	Room for growth
Events/festivals	Transportation
Extend natural gas	Use other communities to model
Gateway appearances	Vacant space / infrastructure for a picturesque downtown
Government grants	Viable market exists that is hungry for options in retail, recreation, etc.
Greenways	Wayfinding
Housing Growth (control)	Welcome signs

Threats	
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Codes / ordinances	I-95 construction
Fear of uncontrollable growth	Resist change

Four Oaks Stakeholder Comments

Strengths	
Attitude - ability to bridge gaps	People
Community Pride	Personable
Convenient Location	Professional Services Available
Faith Based Opportunities	Residential Growth
Good Town Hall Leadership	Rich Heritage
Great Quality of Life	Schools
Great Schools	Schools
Great Town Hall/Leaders/Mayor/Commissioners with excellent communication	Schools, healthcare are all good and close by
Growth coming from Raleigh / pharma in Clayton	Small Size of the Town
Interstate Access	Small Town which many people are looking for - slower pace
Location	Smaller Schools
Location - I-95/I-40 if it had signage to get here	Town Hall has an action plan and they follow through with plan
Location - Proximity to Raleigh	Unified Vision
Location - prximity to I-95/I-40	
Weaknesses	
Attitude - firm opinion on support or lack of support of local govt	Locals not seeing vision of downtown
Downtown buildings not turnkey ready	loss of community spirit due to store closings over the years
Finances	Maintain Status Quo with Growth
Interstates if it had signage to get here	No town manager
Lack of Communication between town and businesses	Nothing Downtown to draw people inside
Lack of family events	People don't see the vision - need to be on the same page
Lack of Infrastructure for Growth	People from out of town say (Four Oaks) looks like a dying town (out of date trash receptacles
Lack of Marketing of town	Streetscape appearance of 301
Lack of Signage	Town Leaders don't support businesses
Opportunities	
Addition of Nightlife/Activities after 5pm and weekends	More entertainment options
Attract good businesses (stores,restaurants)	Marketing & vision of what town could be so people invest
Available land in a great location	More places to socialize
Beautification of town	Need better partnerships with schools & civic organizations
Businesses to improve storefronts	Need Recreation for all ages - trails (not just parks)

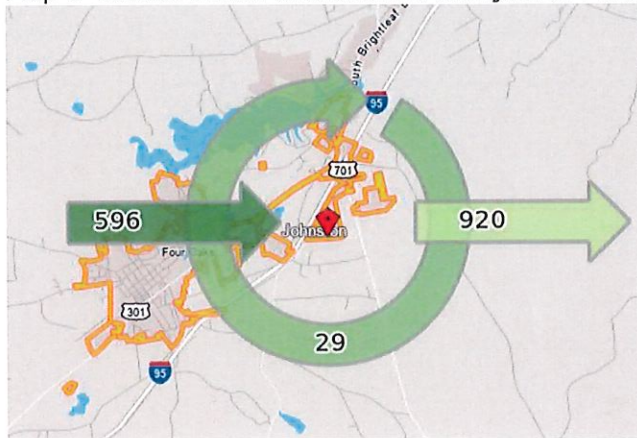
Clean trashcans - pressure wash sidewalks	Nothing needs to change
Economic Development Opportunities - downtown, business park, land near Ashley	Offer small town atmosphere to people looking for it
Events/Festivals to attract people downtown	Residential Growth
Experiencing a lot of growth and FO needs to aggressively prepare	Restaurant Options needed
Growth	Show the community see positive things happening
Identify potential investors who are retired Four Oak natives	Signage, especially off I-95 (No welcome signs)
Make buildings attractive for investment	Town to hire Communication/Event Coordinator
1 Unique Thing About Four Oaks	
Cohesive Atmosphere - no obvious negative elements	Nothing unique just to Four Oaks
Earl & Pearl, chickens that roamed around town and everybody knew their name	Nothing unique just to Four Oaks
Everyone knows everyone	Personable Atmosphere
Nothing	Southern Hospitality (friendly and engaging)
Nothing - know more unique things about other communities	Talent (the "Me's" of this town are amazing. There are so many talented individuals with uniqueness to give FO it's personality. We need a way to channel these talents in a spirit of community!)

Appendix 3 Retail Market Analysis

Jobs – Inflow and Outflow

The following Map (3-1) shows a 2017 jobs inflow and outflow analysis: 596 people were employed in Four Oaks and commute into town; 920 people commuted from Four Oaks to outside town for work; and 29 workers were employed and live in Four Oaks.

Map 3-1. Jobs inflow and outflow analysis of Four Oaks (2017)



Smithfield, Raleigh, Clayton and Selma were the most popular destinations for commuting to work for Four Oaks residents in 2017, which is the most recent data collected.

Table 3-1 Where People Work (2017)

Commute To	Count	Share
Four Oaks	29	4.6%
Smithfield	27	4.3%
Raleigh	22	3.5%
Clayton	20	3.2%
Selma	19	3.0%
Benson	13	2.1%
Dunn	13	2.1%
Cary	5	0.8%
Fayetteville	5	0.8%
Pine Level	5	0.8%
All Other Locations	467	74.7%

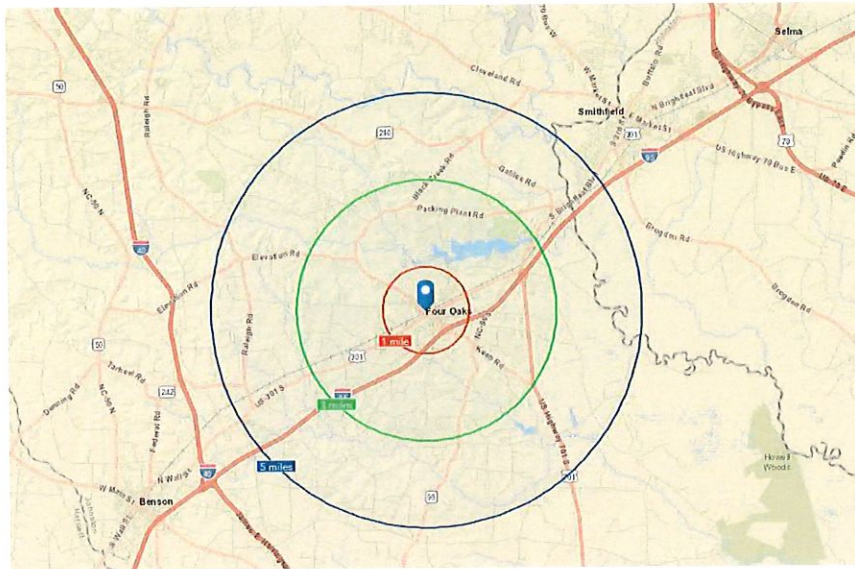
Source: US Census – On the Map

Retail Market Profile

Trade Areas

A Trade Area is simply the contiguous geographic area around a site that generates most of the customers for a business, shopping center or business district. For this profile, we are using distances from downtown Four Oaks. The boundaries on the map below (Map 3-2) represent the 1-Mile Trade Area (red), the 3-Mile Trade Area (green) and the 5-Mile Trade Area (blue) using 300 N Baker Street as the “center” of Town. For the purposes of this report, we are using the 5-Mile Trade Area data. This area encompasses all of Downtown and a little beyond the limits of the Town of Four Oaks.

Map 3.2: 1,3,5 mile Radii of Downtown Four Oaks



- 1 mile Trade Area
(red band)
- 3 mile Trade Area
(green band)
- 5 miles Trade Area
(blue band)

Source: ESRI Site Map

Four Oaks Retail Summary Retail Supply and Leakage

Under the “Surplus/Leakage” column, **negative numbers (red)** represent the “Surplus” or dollars that residents are spending within 1-Mile Trade Area. The **positive numbers (green)** are the dollars “leaking” out of the Trade Areas to purchase products that may not be available within the 3-Mile and 5 Mile-Trade Areas and could represent opportunities for new or expanding business.

Table 3-1 2017 Industry Summary - 1-Mile 3-Mile 5-Mile Radius (Trade Areas)

Radius	Retail MarketPlace Profile Four Oaks NC	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Leakage)	Leakage/ Surplus Factor	Number of Businesses
1 Mile	Total Retail Trade and Food & Drink	\$31,486,781	\$27,291,716	\$4,195,065	7.1	18
3 Miles	Total Retail Trade and Food & Drink	\$72,653,279	\$50,091,548	\$22,561,731	18.4	33
5 Miles	Total Retail Trade and Food & Drink	\$138,776,660	\$74,734,328	\$64,042,332	30.0	49

Source: ESRI and Infogroup 2017 Retail MarketPlace

The summaries for Total Retail Trade and Food & Drink in Table 3-2 show **sales leakage** within all three trade areas: 1-Mile Trade Area (\$4.1 M) 3-Mile Trade Area (\$22.5 M) and the 5-Mile Trade Area (\$64 M).

Table 3-2. 2017 Retail Sales Leakage for 5-Mile Radius from Downtown

Retail Leakage (5-Mile Primary Trade Area)	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Leakage)	Est. Capture 10%	Leakage Factor	Number of Businesses
Electronics & Appliance Stores	\$3,559,141	\$0	\$3,559,141	\$355,914	100.0	0
Automobile Dealers	\$22,854,671	\$3,405,110	\$19,449,561	\$1,944,956	74.1	3
Other Motor Vehicle Dealers	\$2,271,399	\$0	\$2,271,399	\$227,140	100.0	0
Auto Parts, Accessories & Tire Stores	\$2,654,615	\$5,372,021	(\$2,717,406)	(\$271,741)	(33.9)	3
Furniture Stores	\$2,797,246	\$0	\$2,797,246	\$279,725	100.0	0
Home Furnishings Stores	\$1,806,347	\$14,647,163	(\$12,840,816)	(\$1,284,082)	(78.0)	1
Bldg Materials & Supplies Dealers	\$8,593,088	\$2,365,582	\$6,227,506	\$622,751	56.8	1
Lawn & Garden Equip & Supply Stores	\$573,759	\$1,772,061	(\$1,198,302)	(\$119,830)	(51.1)	2
Grocery Stores	\$20,383,389	\$16,624,169	\$3,759,220	\$375,922	10.2	4
Specialty Food Stores	\$798,478	\$186,920	\$611,558	\$61,156	62.1	1
Beer, Wine & Liquor stores	\$701,253	\$0	\$701,253	\$70,125	100.0	0
Health & Personal Care Stores	\$8,024,740	\$2,947,960	\$5,076,780	\$507,678	46.3	2
Gasoline Stations	\$14,001,198	\$13,603,923	\$397,275	\$39,728	1.4	4
Clothing Stores	\$3,709,247	\$290,070	\$3,419,177	\$341,918	85.5	1
Shoe Stores	\$912,726	\$0	\$912,726	\$91,273	100.0	0
Jewelry, Luggage & Leather Goods	\$962,282	\$0	\$962,282	\$96,228	100.0	0
Sporting Goods/Hobby/Musical Instrument Stores	\$2,736,947	\$233,188	\$2,503,759	\$250,376	84.3	2
Book, Periodical, and Music Stores	\$486,668	\$0	\$486,668	\$48,667	100.0	0
Department Stores Excluding Leased Spaces	\$14,611,085	\$0	\$14,611,085	\$1,461,109	100.0	0
Other General Merchandise Stores	\$5,835,626	\$2,806,400	\$3,029,226	\$302,923	35.1	1
Florists	\$172,498	\$288,324	(\$115,826)	(\$11,583)	(25.1)	2
Office Supplies, Stationary, and Gift Stores	\$1,103,260	\$180,383	\$922,877	\$92,288	71.9	1
Used Merchandise Stores	\$595,196	\$181,332	\$413,864	\$41,386	53.3	1
Other Miscellaneous Store Retailers	\$3,752,283	\$550,605	\$3,201,678	\$320,168	74.4	2
Drinking Places (Alcoholic Beverages)	\$809,524	\$0	\$809,524	\$80,952	100.0	0
Restaurants/Other Eating Places	\$11,802,965	\$6,677,296	\$5,125,669	\$512,567	27.7	15

The largest sales leakages (*Table 3-3*) in the 5-Mile radius of Downtown Four Oaks are Automobile Dealers and Building Material & Supplies Dealers at \$19.5M and \$6.2M respectively. Although neither category are usually recruited as downtown businesses, this could be an opportunity for an existing business, such as *American Discount Building Supply*, to assess whether an increase in product lines, renovation or physical expansion might be in order to tap some of that leakage.

Other Miscellaneous Store Retailers, which include stores with unique characteristics like florists, used merchandise stores, and pet and pet supply stores as well as other store retailers, shows a bit of opportunity with \$3.2M leaking out of the downtown and 5-mile Trade Area. Combined with \$2.7M leaking in *Furniture Stores*, there may be opportunity for several boutique stores in downtown that offers locally made and other unique furniture and home décor. Additionally, there's also \$5M leaking in the Health & Personal Care Stores category. With \$5.1M leaking in the Restaurants/Other Eating Places category, there could also be an opportunity for at least one or two local, full-service restaurants in downtown.

Before drawing conclusions about potential business expansion or recruitment opportunities qualitative considerations, such as additional sources should be more closely studied. This could be additional information from ESRI data or sources the county or regional economic development office may have. This report¹ is based on the data collected and should serve as a starting point for your retail recruitment efforts.

¹**Disclaimer:** This report was prepared by the NC Main Street & Rural Planning Center. Information contained in the report is primarily from ESRI On-Line Business Analysis and checked against sources above. Every effort is made to ensure that the information contained within is accurate, however, no warranty is made about the accuracy of this report by the NC Main Street & Rural Planning Center or its sources.

Appendix 4. Demographics

Location

Four Oaks is a town in Johnston County in North Carolina. It is located almost halfway between New York City and Miami. Four Oaks is located just off I95 and is on a major railroad line. It is part of the Raleigh, North Carolina Metropolitan Statistical Area. The town has a total area of 1.63 square miles.

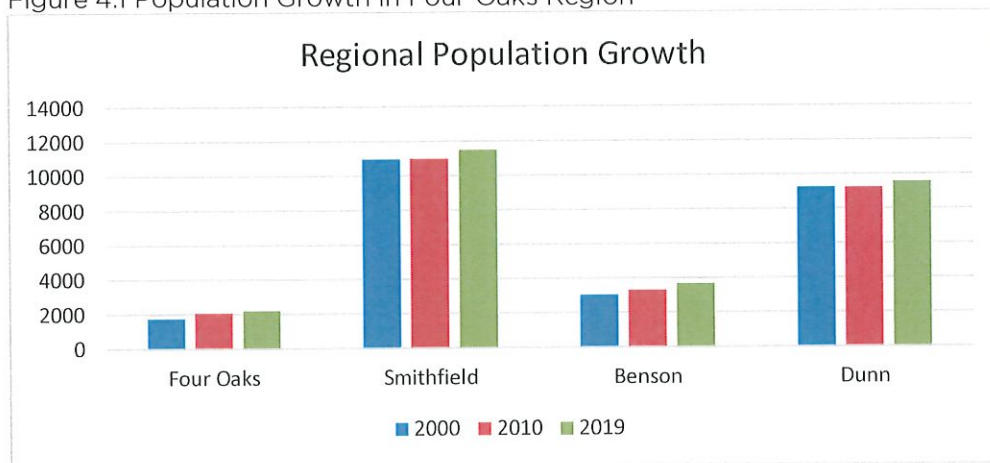
Demographic Summary

In 2019, the Town's population is estimated to be 2,208. The median age was 41.5 years old with an average household income of \$82,164 and average disposable income of \$61,938. With 907 housing units, the median value was \$181,649.

Trends

Regional population growth is showing an increase in Four Oaks and other Johnston and Harnett County communities. Smithfield and Dunn did not show much change between 2000 and 2010 but shows growth to 2019. Four Oaks and Benson both showed steady growth.

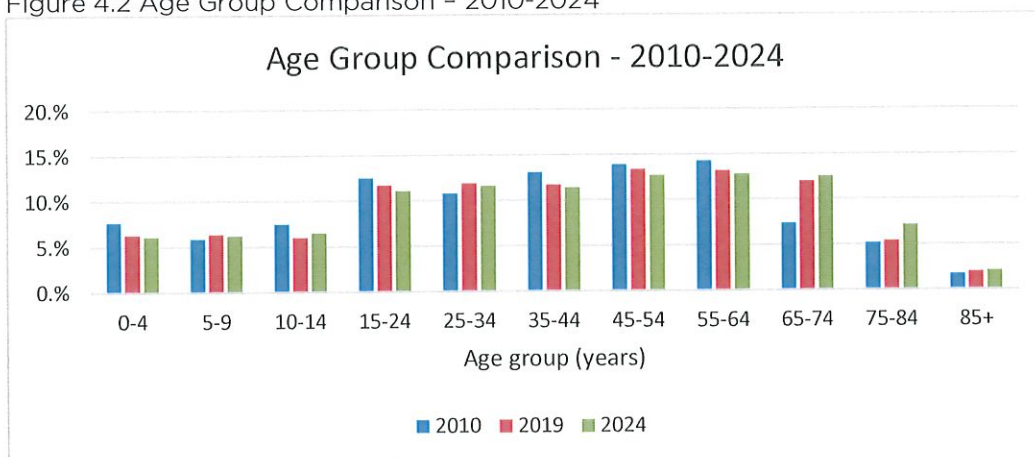
Figure 4.1 Population Growth in Four Oaks Region



Age Groups

Younger, non-working age groups have a slight decrease since 2010 while the 15-24 mid-teen to young adult age group also shows a decline. The 25-34 age group increased between 2010 and 2018 but is forecasted to decline slightly in the next 5 years. The 35-44-year age group is predicted to remain relatively steady from 2010 through 2024 with a slight loss of 45 to 54-year-olds. The pre-retirement age group, 55-64, has been declined the past 19 years but is fairly steady into 2025. There is an increase of older populations, 65-85-plus, from 2010 to 2024.

Figure 4.2 Age Group Comparison - 2010-2024



Summary Primary Trade Area Demographics¹

The following table shows a summary of the Primary Trade Area demographics of Four Oaks as compared to Johnston County and the State of North Carolina.

(table 4-1) Regional Demographic Comparison 2019

Population	Four Oaks	Johnston County	NC
Population	2,208	208,288	10,609,155
Per Capita Income	\$32,720	\$27,873	\$30,207
Household Income (average)	\$82,164	\$76,424	\$76,665
Disposable Income (average)	\$61,938	\$58,702	\$58,280
Median Age	41.5	37.8	38.9
Home Value (median)	\$181,649	\$174,084	\$249,825
Owner Occupied Housing	56.2%	70.1%	56%
Renter Occupied Housing	35.9%	22%	30.5%
Vacant Housing	7.8%	7.9%	13.5%

.25-mile, 3 mile and 5 mile radius.

Table 4-3 Town of Four Oaks, Primary & Secondary Trade Areas Demographics 2019

	Four Oaks	Downtown	Primary Trade Area	Secondary Trade Area
Population	2,208	310	5,664	6,944
Per Capita Income	\$32,720	\$39,185	\$31,524	\$24,834
Household Income (average)	\$82,164	\$95,189	\$80,756	\$65,919
Disposable Income (average)	\$61,938	\$70,872	\$61,061	\$51,443
Median Age	41.5	44	40	37.4
Home Value (median)	\$181,649	\$211,250	\$157,562	\$143,653
Owner Occupied Housing	56.2%	56.5%	57.5%	61.4%
Renter Occupied Housing	35.9%	31.8%	32%	29.2%
Vacant Housing	7.8%	11.7%	10.4%	9.4%

¹ Data Note: Household population includes persons not residing in group quarters. Per Capita Income represents income received by all persons aged 15 years and over divided by the total population. Source: U.S. Census Bureau, ESRI