

LAND OF SKY REGIONAL COUNCIL

Comprehensive Economic Development Strategy

2025-2030

E•D•A

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

LANDofSKY
REGIONAL COUNCIL

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ACRONYMS AND NOMENCLATURE

AAA	Area Agency on Aging	FCC	Federal Communications Commission
AB Tech	Asheville-Buncombe Technical Community College	FBRMPO	French Broad River Metropolitan Planning Organization
AHRMM	Advancing Health Care Through Supply Chain Excellence	FTZ301	Foreign Trade Zone 301
ARC	Appalachian Regional Commission	FSA	Farm Service Agency
ASAP	Appalachian Sustainable Agriculture Project	FIRM	Flood Insurance Rate Map
CCP	Career and College Promise	GIS	Geographic Information System
CDBG-DR	Community Development Block Grant – Disaster Relief	HiForm	High-Resolution Forest Mapping
CDFI	Community Development Financial Institution	HUD	U.S. Department of Housing and Urban Development
CEDS	Comprehensive Economic Development Strategy	LOSRC	Land of Sky Regional Council
CTE	Career and Technical Education	MAWDB	Mountain Area Workforce Development Board
DFIRM	Disaster Flood Insurance Rate Map	MRGAC	Mountain Regional GIS Information Alliance
EDA	U.S. Economic Development Administration	MSD	Metropolitan Sewage District
EDC	Economic Development Commmission/Coalition	NASS	National Agriculture Statistics Service
EDD	Economic Development District	NCBTC	NC Budget and Tax Center
EMC	Electric Membership Corporation	NC CGIA	NC Center for Geographic Information and Analysis
FEMA	Federal Emergency Management Agency	NCDEM	NC Division of Emergency Management

NCDA&CS	NC Department of Agriculture and Consumer Services	NDVI	Normalized Difference Vegetation Index
NCDEQ	NC Department of Environmental Quality	P20	Preschool through Postsecondary Council
NCDHHS	NC Department of Health and Human Services	LOSRPO	Land of Sky Rural Planning Organization
NCDNCR	NC Department of Natural and Cultural Resources	SBA	Small Business Administration
NCDOC	NC Department of Commerce	SBTDC	Small Business and Technology Development Center
NCDIT	NC Department of Information Technology	SWOT	Strengths, Weaknesses, Opportunities, and Threats
NCDOT	NC Department of Transportation	TRIP	The Road Information Program
NCEM	NC Emergency Management	UNC	The University of NC
NCWorks	NC Works Workforce System	UNCA	University of NC – Asheville
NCSP	NC State Parks	USDA	U.S. Department of Agriculture
NC HFA	NC Housing Finance Agency	USDOL	U.S. Department of Labor
NTIA	National Telecommunications and Information Administration	USFS	U.S. Forest Service
NRCS	Natural Resources Conservation Service	USGS	U.S. Geological Survey
NC OSBM	NC Office of State Budget and Management	USDT	U.S. Department of the Treasury
NEMAC	National Environmental Modeling and Analysis Center	WGEER	Working Group for Enhanced Emergency Response
NOAA NCEI	National Oceanic and Atmospheric Administration National Centers for Environmental Information	WISHT	WNC Initiative for Supportive Housing and Transportation
NPS	National Park Service	WNC	Western NC
		YMCA	Young Men's Christian Association

EXECUTIVE SUMMARY

Land of Sky Regional Council (LOSRC) is a designated Economic Development District (EDD) through the U.S. Economic Development Administration (EDA). As one of Western North Carolina's (WNC) EDDs, the Council is responsible for developing a Comprehensive Economic Development Strategy (CEDS) every five years to guide long-term economic development, strengthen regional coordination, and support federal funding eligibility for our four-county region (Buncombe, Henderson, Madison, and Transylvania Counties).

The CEDS outlines four regional strategic goals that reflect current economic conditions, demographic trends, and long-term resilience needs:

- I. Support a Dynamic Regional Economy
- II. Health, Wellness, and Quality of Life
- III. Opportunity and Prosperity for All
- IV. Prepared and Recovering Communities

Through extensive input from member local governments, businesses, nonprofit organizations, and community members, the Land of Sky CEDS identifies the challenges that must be overcome and the strategies required to address them. This CEDS also highlights priority areas where regional collaboration can strengthen economic competitiveness, support quality of life, and improve long-term resilience—particularly in light of the impacts of Tropical Storm Helene. We look forward to revisiting the goals, strategies, and metrics outlined in this document alongside regional stakeholders annually to ensure that we are tracking towards our intended outcomes with community, efficiency, and relevance top of mind.

INTRODUCTION

What is “CEDS”

The CEDS is a locally based, regionally driven economic development planning process and strategic document. It provides a framework for regions to identify strengths and weaknesses and convenes a broad network of partners to support job creation, economic diversification, and long-term growth. This process engages a range of partners, including EDDs, community leaders and residents, tribes, the private sector, educational institutions, and other stakeholders to collaboratively plan for the region’s economic future.

An effective CEDS helps a region maximize economic development potential and engage with the EDA and other federal partners to access infrastructure and technical assistance grants, such as EDA’s Public Works and Economic Adjustment Assistance programs.

The CEDS is a pre-requisite for federal designation as an EDD and must be updated annually, with a full revision every five years. LOSRC completed a 5-year CEDS in 2020, with an annual update including a strategic plan and metrics crosswalk.

Overall, an effective CEDS identifies locally developed strategies that guide regional economic development, encourage partnerships, and improve economic outcomes and quality of life. As a strategy driven plan for regional economic development, the CEDS guides the establishment of regional goals and strategies that support long-term recovery and economic prosperity in WNC.

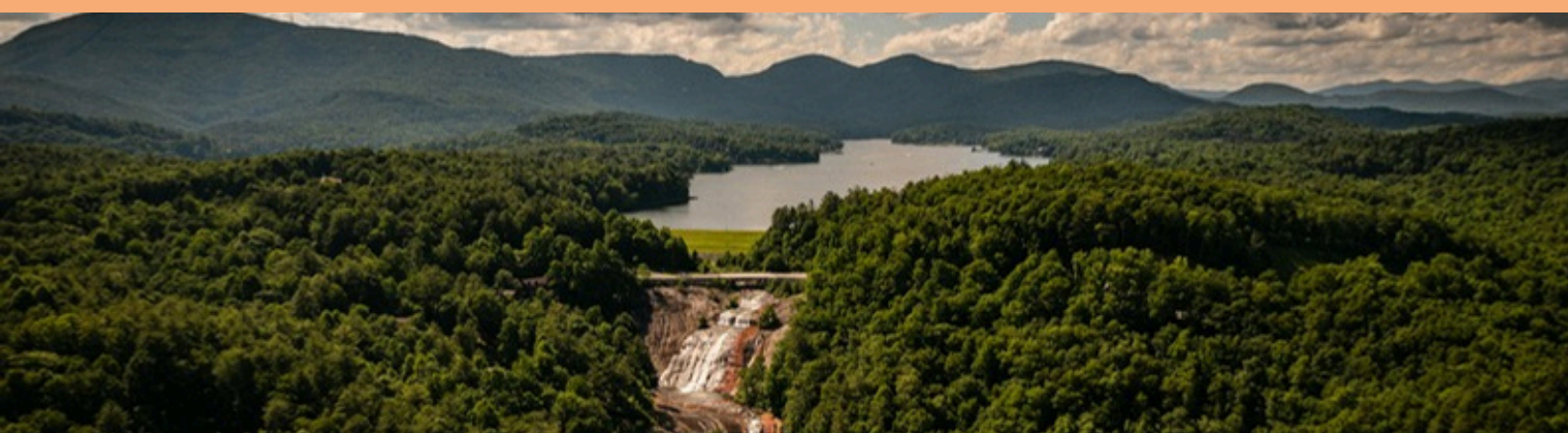


Image credit: Asheville Pictures.

HOW TO USE THIS REPORT

This report is the result of LOSRC's collaborative efforts with regional stakeholders representing communities, businesses, industries, and economic professionals to identify strategies that leverage regional assets and opportunities, diminish barriers, and create a vibrant and competitive regional economic environment that is both evolving and resilient. This strategy is informed by Grow NC's WNC Recovery plan, regional and state-wide strategic plans, comprehensive plans, and regional recovery plans. Readers are encouraged to use the data provided throughout this report to build local strategies that align with and complement regional and state efforts.

In addition, alignment with the regional CEDS can strengthen local efforts as communities and businesses pursue federal and state funding opportunities for industry investment, infrastructure improvements, and recovery efforts.

The CEDS is considered a 'living document'. As time passes and regional conditions and trends change, the data in the CEDS will be updated, and progress toward identified goals will be evaluated annually to reflect and incorporate those changes via our online dashboard.

CEDS PROCESS AND TIMELINE

Land of Sky's CEDS is a strategy-driven plan developed collaboratively by a diverse workgroup of local representatives from private, public, and nonprofit sectors who make up the CEDS Steering Committee.

The following four sections are foundational components of Land of Sky's CEDS and were co-developed with the CEDS Steering Committee and shared with various stakeholder groups via direct group engagement, online public surveys, and public input sessions:

01

Summary Background of economic conditions in the region

02

Analysis to identify regional Strengths, Weaknesses, Opportunities, and Threats (SWOT)

03

Action Plan including priority goals and strategies identified through the planning process, SWOT feedback, crosswalk of regional and state plans, and stakeholder feedback.

04

Evaluation Framework to identify and monitor performance measures associated with the action plan.

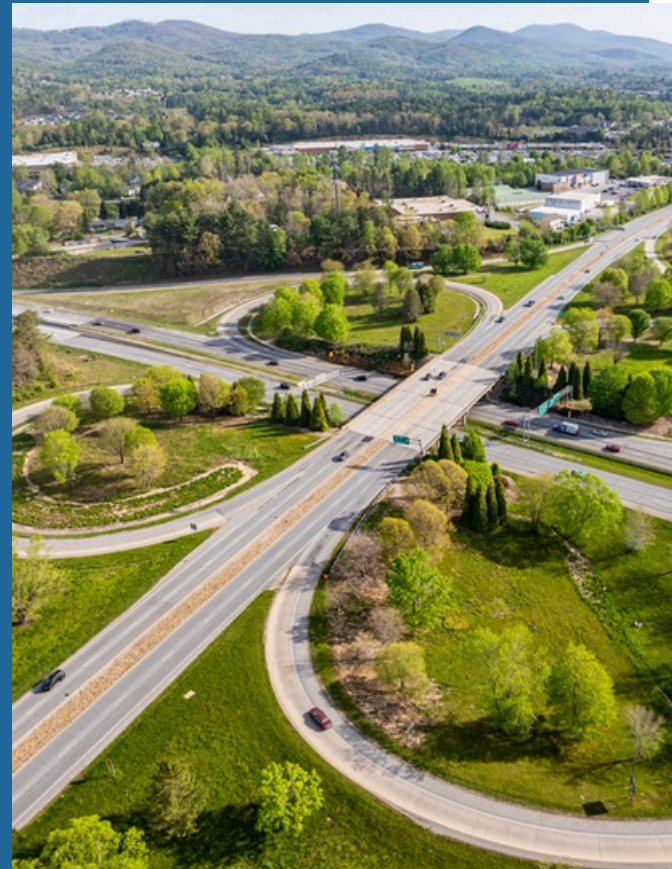


Image credit: Asheville Pictures.

The CEDS Steering Committee guides this process to ensure a strong relationship and coordination between the action plan and performance measures for economic and community development at the regional, state, and federal levels.

The CEDS Steering Committee was finalized in February 2025 through invitations to over 70 individuals representing a wide range of industries and community organizations across the four-county region. The group met virtually each month from March–July 2025 to develop key aspects of the plan.

All CEDS meetings were open to the public. Our CEDS development timeline is outlined below:

- **January** Developed a brief, web-based survey to inform the SWOT Analysis and distributed it regionwide. Compile results.
- **February** Established the CEDS Steering Committee.
- **March** Developed the summary background with the CEDS Steering Committee.
- **April** Conducted SWOT analysis with Steering Committee and other existing focus groups at LOSRC. Compiled results.
- **April/May** Developed and finalized SWOT analysis and began discussions about strategies and goals with the Steering Committee. Gathered statewide and regional strategic plans, as well as Helene Recovery plans. Hosted the first public input session.
- **June/July** Assembled the CEDS document and continued to gather data via community surveys.
- **July/August** Sought stakeholder input and public comments-continued to incorporate those.
- **September** Finalized the first CEDS draft and incorporated final comments from the CEDS Steering Committee.
- **October** Presented the CEDS to the LOSRC Council and opened it for final public comment.
- **November** Incorporated final comments into the document and submitted it to EDA.

BACKGROUND SUMMARY

Our Vision for the Region

A resilient and prosperous region that fosters innovation and opportunity. We support thriving businesses, expanding access to education and quality jobs, and investing in resilient infrastructure that nurtures healthy communities while safeguarding the natural and cultural resources that define the Land of Sky Region—ensuring durability through change and recovery.

Land of Sky Regional Council Mission

Our mission is to provide creative regional solutions to relevant and emerging issues in the four-county region while providing a standard of excellence in the delivery of federal, state, and regional services for our member communities.

Overview of Land of Sky Regional Council

LOSRC is a multi-county, local government, planning, and development organization. We work across county and municipal boundaries providing technical assistance to local governments and administering projects and programs that benefit our region's residents.

What We Offer

LOSRC serves as the region's designated EDD, providing regional planning, coordination, and technical assistance for Buncombe, Henderson, Madison, and Transylvania counties. As a multi-county local government organization, LOSRC supports economic and community development, workforce and talent initiatives, aging services, and regional transportation planning.

These functions help strengthen economic resilience in the region, align federal and state resources with local needs, and support the implementation of the CEDS. Detailed descriptions of LOSRC's departments and an organizational breakdown are included in Appendix A.

Land of Sky Regional Council's 2025 Member Governments

Figure 1 provides an overview of the member governments that comprise the Land of Sky Region.

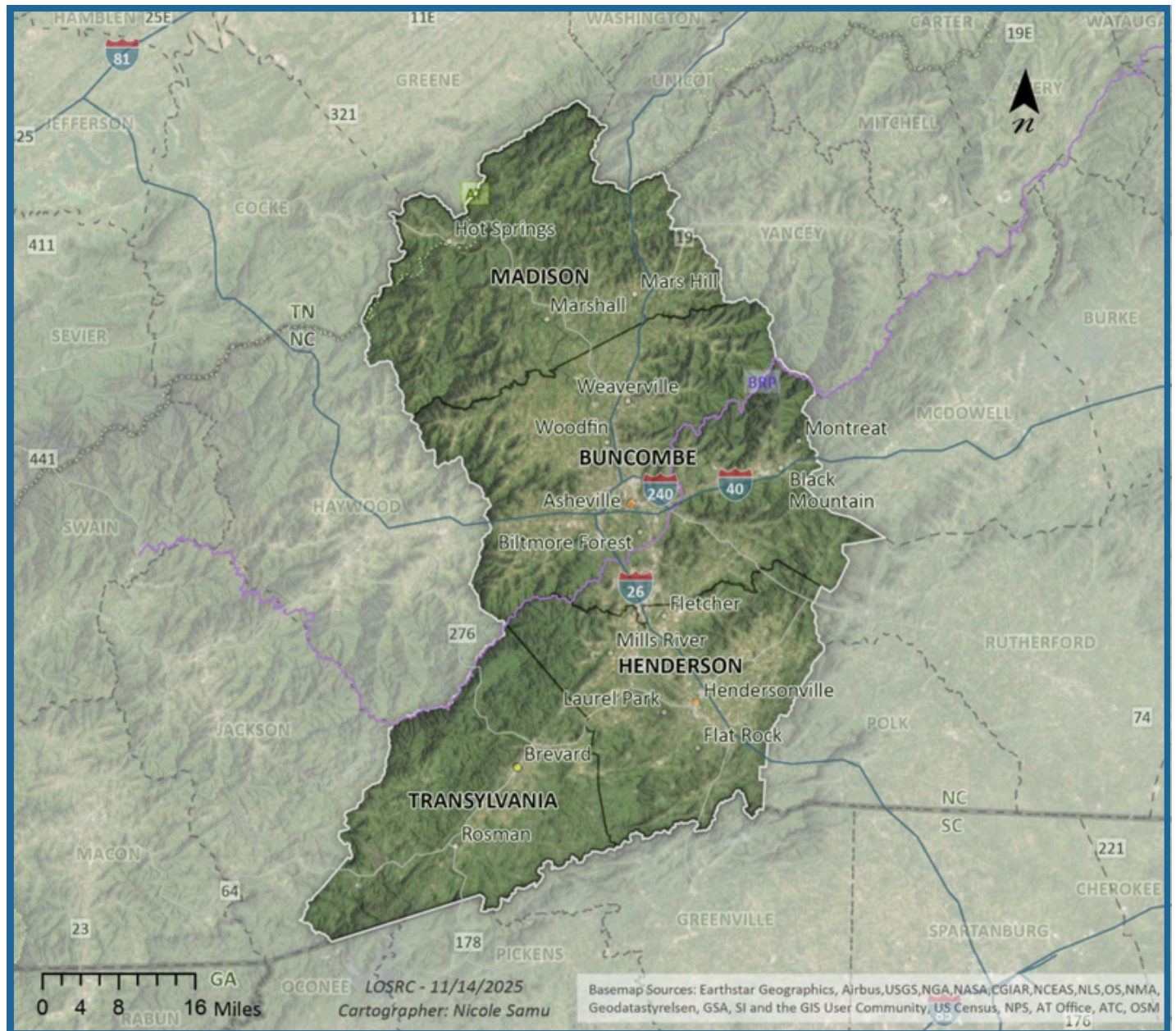


Figure 1. LOSRC's member governments. (Map Source: LOSRC, 2025).

Region Overview

As seen in Figure 1 above, the Land of Sky Region is comprised of 19 local governments across four counties: Buncombe, Henderson, Madison, and Transylvania. As of 2025, the combined population of these counties is approximately 462,042, reflecting steady growth driven by immigration and population trends consistent with projections from the 2020 CEDS (NC OSBM, 2025).

Regional

Includes Buncombe, Henderson, Madison, and Transylvania counties



Population¹

- Total Population **462,042**²
- Projected Population 2050 **574,673**³

Age 24 and Under **25.5%**

Age 25–64 **51.5%**

Age 65 and Up **23%**

Projected to grow **36%** by 2043⁴

Urban **45.8%**⁵



Rural **54.2%** ▶ Farm Land 165,288 acres⁶

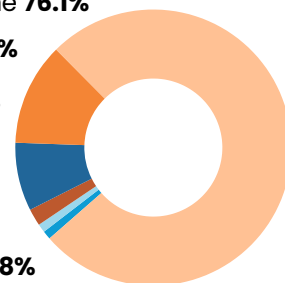
Female **51.7%**

Male **48.3%**

Minority **18.8%**

Commuting Mode⁷

- Drove alone **76.1%**
- Remote Work **12.4%**
- Carpooled **7.8%**
- Walked **1.7%**
- Other **1.2%**
- Public Transit **0.8%**



Miles of Greenway **22.86**⁸

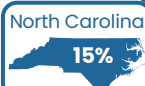
Economic

Median Household Income **\$69,236**⁹

- Per Capita Income⁹ **\$38,123**
- Per Capita Living Wage¹⁰ **\$73,398.5**
- Total Economy¹¹ **22.8 million**
- Percent of Families Below Poverty Level¹² **11.9%**

Food Insecurity Rate¹³

- Buncombe **15%**
- Henderson **14.9%**
- Madison **15.5%**
- Transylvania **15.5%**



Housing

Median Home Value **\$382,769**¹⁴

Median Gross Rent **\$1,131**¹⁴

- Cost Burdened Households¹⁴ **25.9%**
> 30% of income towards housing
- Severe Cost Burdened Households¹⁴ **11.8%**
> 50% of income towards housing

Housing Units¹⁵

- Housing Vacancy Rate **19.9%**
- No Vehicle Available **4.6%**
- Occupied **176,084**
- Unoccupied **49,793**

Education

Institutions¹⁶

A-B Technical Community College
Blue Ridge Community College
Brevard College
Lenoir-Rhyne University
Mars Hill University
Montreat College
South College - Asheville
UNC-Asheville
Warren Wilson College
Western Carolina University - Biltmore Park
Wingate - Hendersonville

Attainment¹⁷

Residents age 25–44
No degree **43.6%**



Have Degree or Credential **56.4%**

Industries¹⁸

Top 10 Industries	2023	2021	% Change
Health Care & Social Assistance	33,435	34,547	-3.2%
Retail Trade	25,837	26,328	-1.9%
Accommodation & Food Services	21,312	21,037	1.3%
Manufacturing	20,732	22,609	-8.3%
Educational Services	19,900	17,122	16.2%
Other Services	18,468	16,257	13.6%
Public Administration	13,180	13,376	-1.5%
Construction	8,406	7,763	8.3%
Professional, Scientific, & Technical Services	7,118	6,136	16%
Finance and Insurance	6,554	5,820	12.6%

Labor Force Participation Rates¹⁹

- Buncombe **76.6%**
- Henderson **77.0%**
- Madison **73.8%**
- Transylvania **75.8%**

*population 20–64 years

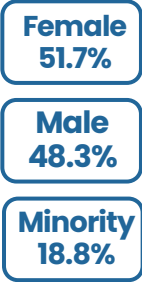
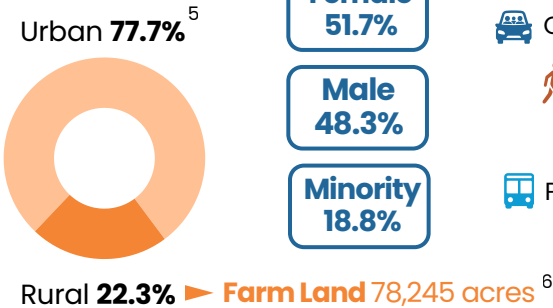
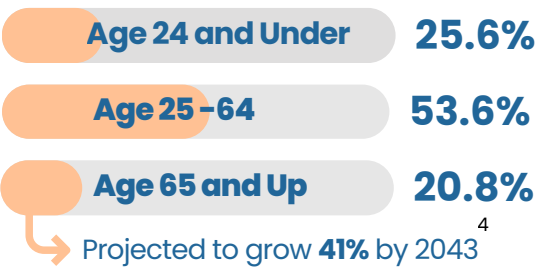
Buncombe County

County Seat: Asheville (94,369) | Founded 1791¹

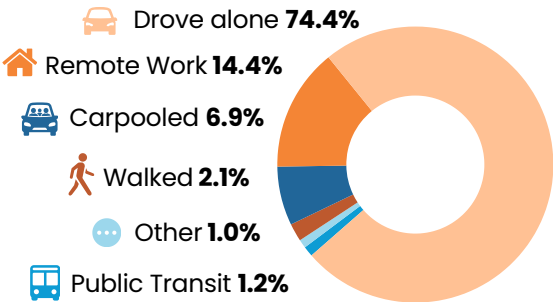


Population¹

- Total Population **283,020**²
- Projected Population 2050 **357,675**³



Commuting Mode⁷



Economic

Median Household Income

\$70,578⁸

- Per Capita Income⁸ **\$40,879**
- Per Capita Living Wage⁹ **\$79,483**
- Total Economy¹⁰ **\$16 million**
- Percent of Families¹¹ Below Poverty Level **11.8%**
- County Property Tax¹² Value per \$100 **\$0.498**

Food Insecurity Rate¹³



Housing

Median Home Value

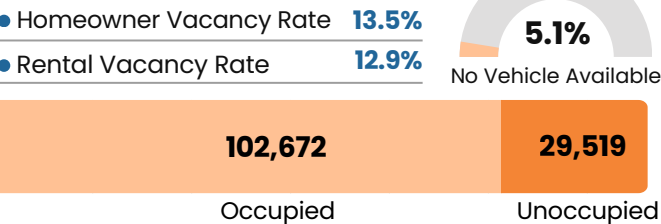
\$400,081¹⁴

Median Gross Rent

\$1,209¹⁴

- Cost Burdened Households¹⁴ **29.8%**
> 30% of income towards housing
- Severe Cost Burdened Households¹⁴ **12.3%**
> 50% of income towards housing

Housing Units¹⁵



Education

Institutions¹⁶

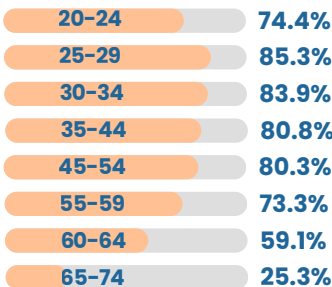
A-B Tech Community College
Lenior-Rhyne University
Montreat College
University of North Carolina - Asheville
South College - Asheville
Warren Wilson College
Western Carolina University - Biltmore Park

Attainment¹⁷

Residents age 25-44
No degree **39.3%**



Labor Force Participation Rates¹⁹



Industries¹⁸

Top 10 Industries	2023	2021	% Change	Median Earnings
Health Care & Social Assistance	21,679	22,782	-4.8%	\$119,579
Retail trade	15,400	16,000	-3.8%	\$57,149
Accommodation & Food Services	14,916	14,214	4.9%	\$47,524
Manufacturing	12,344	13,273	-7.0%	\$90,696
Professional, Scientific, Technical Services	10,890	9,744	11.8%	\$126,274
Construction	10,770	10,181	5.8%	\$74,538
Educational Services	10,297	10,458	-1.5%	\$93,752
Admin & Waste Management	4,820	4,580	5.2%	\$67,802
Public Administration	4,262	3,675	16%	\$123,167
Transportation & Warehousing	3,638	3,474	4.7%	\$88,901

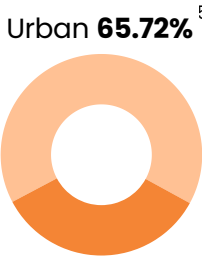
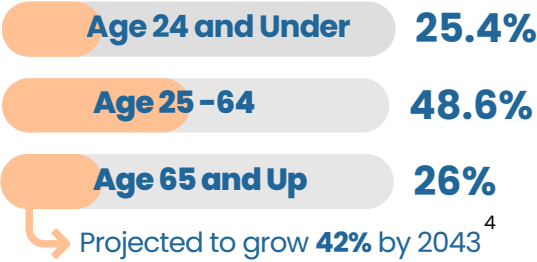
Henderson County



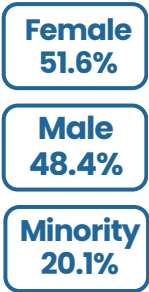
County Seat: Hendersonville (5,253) | Founded 1838¹

Population¹

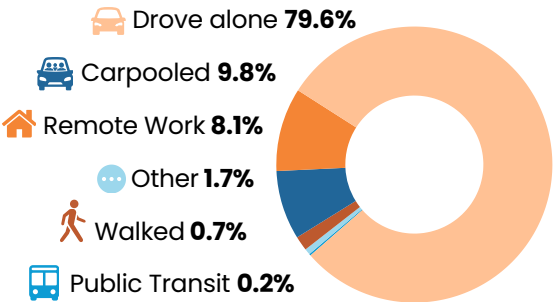
- Total Population **123,515**²
- Projected Population 2050 **158,592**³



Rural **34.28%** ▶ Farm Land **32,743 acres**⁶



Commuting Mode⁷



Economic

Median Household Income \$67,623⁸

- Per Capita Income⁸ **\$28,976**
- Per Capita Living Wage⁹ **\$75,034**
- Total Economy¹⁰ **\$4.6 million**
- Percent of Families¹¹ Below Poverty Level **11.7%**
- County Property Tax¹² Value per \$100 **\$0.431**

Food Insecurity Rate¹³

- Henderson **14.9%**
- North Carolina **15%**

Housing

Median Home Value \$361,810¹⁴

Median Gross Rent \$1,032¹⁴

- Cost Burdened Households¹⁴ **35.37%**
> 30% of income towards housing
- Severe Cost Burdened Households¹⁴ **11.23%**
> 50% of income towards housing

Housing Units¹⁵

- Homeowner Vacancy Rate **0.9%**
- Rental Vacancy Rate **6.2%**

3.8% No Vehicle Available

50,423 Occupied | **6,915** Unoccupied

Education

Institutions¹⁶

Blue Ridge Community College
Wingate University – Hendersonville Campus

Attainment¹⁷

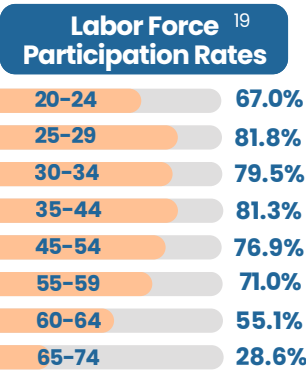
Residents age 25–44

No degree **51.5%**

Have Degree or Credential **48.5%**

Industries¹⁸

Top 10 Industries	2023	2021	% Change	Median Earnings
Health Care & Social Assistance	8,481	8,266	2.6%	\$105,588
Retail trade	7,309	7,728	-5.4%	\$55,603
Manufacturing	6,302	7,249	-13.1%	\$90,391
Construction	4,907	4,448	10.3%	\$70,991
Accommodation & Food Services	4,799	4,866	-1.4%	\$34,018
Educational Services	3,727	3,544	5.2%	\$77,871
Professional, Scientific, Technical Services	2,706	2,750	-1.6%	\$124,443
Admin & Waste Management	2,448	2,043	19.8%	\$72,629
Transportation & Warehousing	2,035	1,566	29.9%	\$80,716
Public Administration	1,719	1,322	30.0%	\$113,689



Sources: Appendix D

Madison County

County Seat: Marshall (846) | Founded 1851¹



Population¹

- Total Population **21,926**²
- Projected Population 2050 **24,093**³

Age 24 and Under **27.3%**

Age 25 – 64 **49.6%**

Age 65 and Up **23.1%**

Projected to grow **11%** by 2043⁴

Urban **0.0%**⁵



Rural **100%** ▶ Farm Land **42,763 acres**⁶

Female **50.3%**

Male **49.7%**

Minority **8.4%**

Commuting Mode⁷

Drove alone **78.2%**

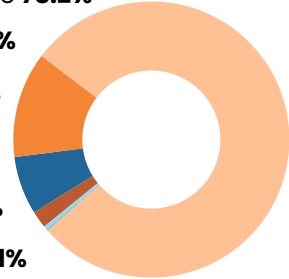
Remote Work **12.4%**

Carpooled **6.8%**

Walked **2.0%**

Other **0.5%**

Public Transit **0.1%**



Economic

Median Household Income

\$58,628⁸

- Per Capita Income⁸ **\$33,738**
- Per Capita Living Wage⁹ **\$67,773**
- Total Economy¹⁰ **\$442,034**
- Percent of Families¹¹
Below Poverty Level **11.4%**
- County Property Tax¹²
Value per \$100 **\$0.500**

Food Insecurity Rate¹³

- Madison **15.5%**
- North Carolina **15%**

Housing

Median Home Value

\$285,524¹⁴



Median Gross Rent

\$760¹⁴

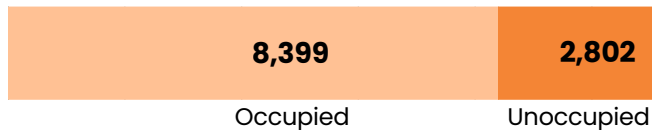


- Cost Burdened Households¹⁴
> 30% of income towards housing **23.3%**
- Severe Cost Burdened Households¹⁴
> 50% of income towards housing **9.8%**

Housing Units¹⁵

- Homeowner Vacancy Rate **1.5%**
- Rental Vacancy Rate **1%**

3.6%
No Vehicle Available



Education

Institutions¹⁶

A-B Tech Community College
Madison
Mars Hill University

Attainment¹⁷

Residents age 25–44

No degree **55.2%**

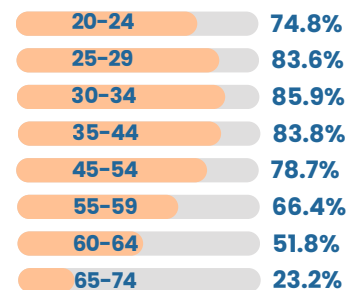


Have Degree or
Credential **44.8%**

Industries¹⁸

Top 10 Industries	2023	2021	% Change	Median Earnings
Retail Trade	1,458	1,093	33.4%	\$42,521
Educational Services	1,316	1,108	18.8%	\$84,792
Healthcare & Social Assistance	1,211	1,396	-13.3%	\$113,615
Construction	1,197	1,206	-0.7%	\$86,183
Public Administration	726	728	-0.3%	\$107,204
Manufacturing	589	663	-11.2%	\$84,199
Transportation & Warehousing	511	410	24.6%	\$92,675
Accommodation & Food Services	463	438	5.7%	\$45,369
Professional, Scientific, Technical Services	439	302	45.4%	\$154,297
Admin & Waste Management	383	379	1.1%	\$55,017

Labor Force¹⁹
Participation Rates



Sources: Appendix E

Transylvania County

County Seat: Brevard (7,795) | Founded 1861 ¹

Population ¹

- Total Population **33,581** ²
- Projected Population 2050 **34,313** ³

Age 24 and Under 23.2%

Age 25 – 64 46%

Age 65 and Up 30.8%

Projected to grow **9%** by 2043 ⁴

Urban **39.6%** ⁵



Rural **60.4%** ▶ **Farm Land 11,537 acres** ⁶

Female 50.3%

Male 49.7%

Minority 8.4%

Commuting Mode ⁷

Drove alone **77.7%**

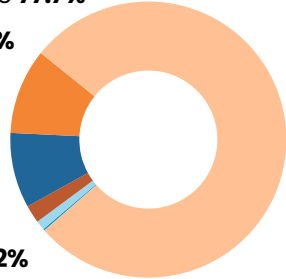
Remote Work **10.0%**

Carpooled **8.8%**

Walked **2.1%**

Other **1.1%**

Public Transit **0.2%**



Economic

Median Household Income

\$64,523 ⁸

- Per Capita Income ⁸ **\$38,899**
- Per Capita Living Wage ⁹ **\$71,304**
- Total Economy ¹⁰ **\$1.8 million**
- Percent of Families ¹¹ Below Poverty Level **14.2%**
- County Property Tax ¹² Value per \$100 **\$0.603**

Food Insecurity Rate ¹³

- Transylvania **15.5%**
- North Carolina **15%**

Housing

Median Home Value

\$394,567 ¹⁴



Median Gross Rent

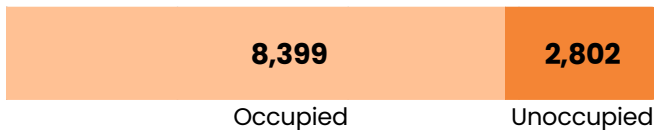
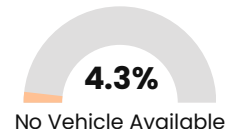
\$861 ¹⁴



- Cost Burdened Households ¹⁴ **23.6%**
> 30% of income towards housing
- Severe Cost Burdened Households ¹⁴ **11.5%**
> 50% of income towards housing

Housing Units ¹⁵

- Homeowner Vacancy Rate **2.3%**
- Rental Vacancy Rate **2.6%**



Education

Institutions ¹⁶

Blue Ridge Community College – Transylvania Campus
Brevard College

Attainment ¹⁷

Residents age 25–44

No degree **53.1%**

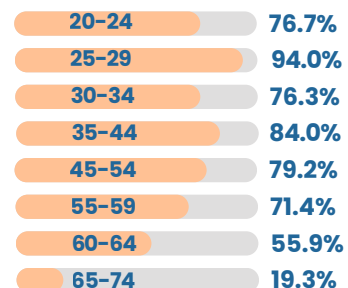


Have Degree or Credential **46.9%**

Industries ¹⁸

Top 10 Industries	2023	2021	% Change	Median Earnings
Healthcare & Social Assistance	2,064	2,103	-1.9%	\$120,836
Retail Trade	1,670	1,507	10.8%	\$59,287
Manufacturing	1,497	1,424	5.1%	\$89,164
Construction	1,441	1,287	12%	\$82,531
Educational Services	1,242	1,147	8.3%	\$66,027
Accommodation & Food Services	1,134	1,519	-25.3%	\$48,352
Admin & Waste Management	755	761	-0.8%	\$58,892
Professional, Scientific, Technical Services	651	580	12.2%	\$158,727
Real Estate & Rental & Leasing	594	625	-5.0%	\$110,992
Finance & Insurance	508	370	37.3%	\$81,674

Labor Force ¹⁹
Participation Rates



Sources: Appendix F

REGIONAL DATA

Population Growth and Demographics

As seen in the regional County profiles above, the Land of Sky Region is projected to grow substantially through 2050, with the four-county area of Buncombe, Henderson, Madison, and Transylvania expected to add roughly 112,630 residents — approximately a 24.4% increase across the region. Growth is concentrated in Buncombe and Henderson counties, while Madison and Transylvania are forecast to grow more slowly. Based on July 2050 projections from the NC Office of State Budget and Management (NC OSBM), Buncombe County's population is estimated to reach approximately 357,675 and Henderson County around 158,592.

At the same time, all four counties are undergoing a demographic shift: the share of residents aged 65 and older is steadily increasing as the region attracts more retirees and sees more aging-in-place households, while the proportion of children under ten continues to decline. The population of older adults is expected to grow 36% by 2043 (NCDHHS, 2025). These trends reflect a region marked by moderate overall growth, sustained in-migration of older adults, and a stable but slower-growing younger-family base.

Why This Matters for Economic Development

The region's shifting age structure has significant implications for economic growth. These trends signal critical investment needs in transportation, available housing units, healthcare and mental health services, dependent care, housing, and workforce systems that support an aging population while maintaining economic vitality.

Regional Economic Overview

The Land of Sky Region supports a varied \$22 billion economy anchored by healthcare, hospitality and tourism, advanced manufacturing, professional and technical services, and a growing outdoor and creative sector (U.S. Census Bureau, 2023). Its strengths are reinforced by steady population growth, key institutions, commercial districts, growing industry, and a strategic location at the intersection of Interstates 26 and 40, connecting WNC to major metropolitan areas, ports, and airports.

The region's economic performance relies on both its natural assets and its traditional and emerging industry clusters. However, persistent infrastructure gaps, an aging population, housing affordability challenges, and limited broadband access in rural areas create structural pressures that must be addressed to maintain long-term competitiveness (Asheville Area Chamber of Commerce, 2025).

Key Industry Drivers

Healthcare and Social Assistance represent the region’s largest employment sectors, providing stability and consistent wages across urban and rural communities (Data USA, 2023). Hospitality and tourism remain central to the economy, driven by outdoor recreation, cultural tourism, public lands, and a strong visitor base. Advanced manufacturing continues to evolve, with growing specialization in plastics, automotive components, outdoor products, advanced textiles, ceramics, as well as food and beverage production (Riverbird Research, 2025). Professional and technical services have expanded in response to employer demand, entrepreneurial growth, and broader economic diversification.

Workforce and Talent Pipeline

The regional workforce is evolving to meet changing employer needs. The Mountain Area Workforce Development Board (MAWDB), local K–12 systems, and regional higher education partners including A-B Tech, Blue Ridge Community College, Mars Hill University, University of North Carolina Asheville (UNCA), Brevard College, Montreat College, and Warren Wilson College continue to expand programs in advanced technologies, skilled trades, agricultural sciences, health sciences, STEAM fields, and work-based learning. Career pathway initiatives such as Made in Henderson County, teacher training programs, trade programs for area high school students, City of Asheville Youth Leadership Academy, apprenticeships, and dual-enrollment programs support talent development and help strengthen connections between students, career seekers, and local employers. Ongoing focus on talent attraction and retention is critical as labor force participation lags, and replacement demand rises due to retirements (MAWDB, 2024).



Image credit: Transylvania Economic Alliance

Outdoor, Creative, and Cultural Economy

The region’s natural assets, cultural heritage, and creative industries drive investment, entrepreneurship, and tourism. Public lands, trails, rivers, and scenic amenities attract millions of visitors annually, supporting both small businesses and major companies. By embracing and celebrating our outdoor economy, numerous internationally celebrated companies such as ENO and Cane Creek Cycling have made our region their home (WNC Arts, 2025).

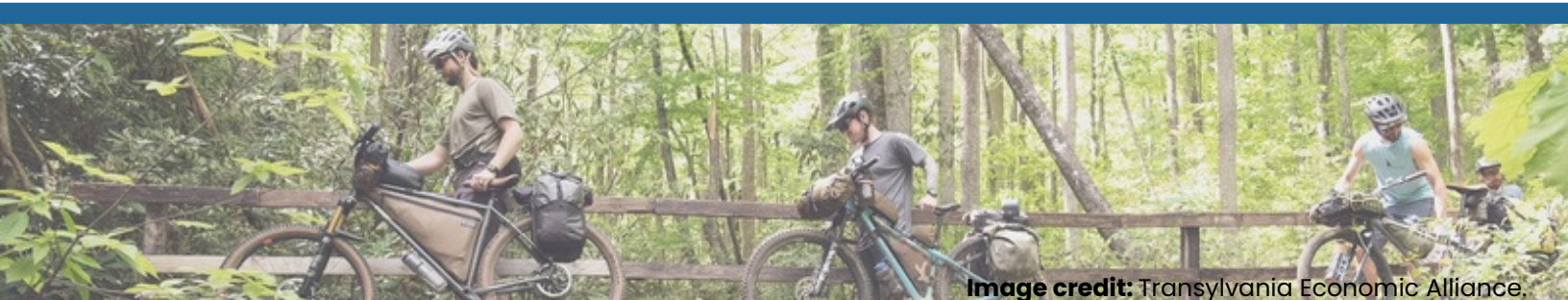


Image credit: Transylvania Economic Alliance.

Creative entrepreneurs, makers, galleries, musicians, craft traditions, festivals, and cultural institutions add depth to the regional economy while reinforcing the region’s identity, sense of place, and ability to attract talent and businesses. The region supports an estimated 12,300 creative jobs across 56 industries, anchored by independent artists, commercial printing, film/media production, and fine arts occupations. Despite a significant slowdown in 2024 following Tropical Storm Helene, the region still shows positive workforce and earnings growth, with Madison County accelerating, Buncombe remaining the anchor hub, Henderson specializing in theater and media production, and Transylvania maintaining strengths in arts education, book publishing, and craft-based manufacturing. Regional creative workers are concentrated in photography, writing, music, fine arts, and events, highlighting a strong gig and sole-proprietor economy. Combined, the counties form an interconnected creative ecosystem spanning heritage tourism, contemporary media, arts education, and craft entrepreneurship (WNC Arts, 2025). The intersection of the outdoor economy, arts, and tourism is a defining regional strength tied directly to quality of life and long-term economic vitality.



Image credit: Asheville Pictures.

Infrastructure and Mobility

Regional connectivity is a core economic asset. The region is centered on Interstates I-26 and I-40, and major freight corridors that link WNC to national supply chains. The Foreign Trade Zone 301 (FTZ301) and Asheville Regional Airport’s expanded routes and recently expanded facility enhance access to international markets and position the area as a growing transportation hub. However, infrastructure capacity varies significantly. Larger municipalities in the region maintain more robust water, sewer, and transportation systems, while rural communities often rely on aging systems, wells, or septic networks. With a large number of these regional assets being privately owned. This is at odds with our region’s need to expand housing units, and to remain competitive with larger industry needs for space. Broadband and communications access remain uneven due to terrain, cost, and infrastructure limitations, affecting educational access, telehealth, and business competitiveness (Institute for Emerging Issues, 2024; FCC, 2024; NCDIT, 2023).



Long-range mobility planning through the French Broad River Metropolitan Planning Organization (FBRMPO) and Land of Sky Rural Planning Organization (LOSRPO) will continue guiding investments that support efficient and streamlined roadways, freight movement, commuting patterns, and multimodal access.

Image credit: Asheville Pictures.

Economic Outlook

The region’s long-term economic outlook remains strong, supported by its natural assets, strategic geographic location, range of industry, and regional collaboration. To stay competitive, the region must continue to invest in infrastructure, housing, workforce development, supportive services, protecting regional assets, and technology systems that strengthen resilience and expand economic opportunities, particularly in the face of Helene. Aligning industry needs with workforce pipelines, accelerating housing production, business support, modernizing aging infrastructure, and improving digital connectivity will be critical to sustaining growth and ensuring shared prosperity (Asheville Area Chamber of Commerce, 2025). To thrive economically, the region must continue to be a place where talented people and their businesses want to be. This includes maintaining a high quality of life in the region and providing the critical infrastructure needed for businesses and people to succeed.

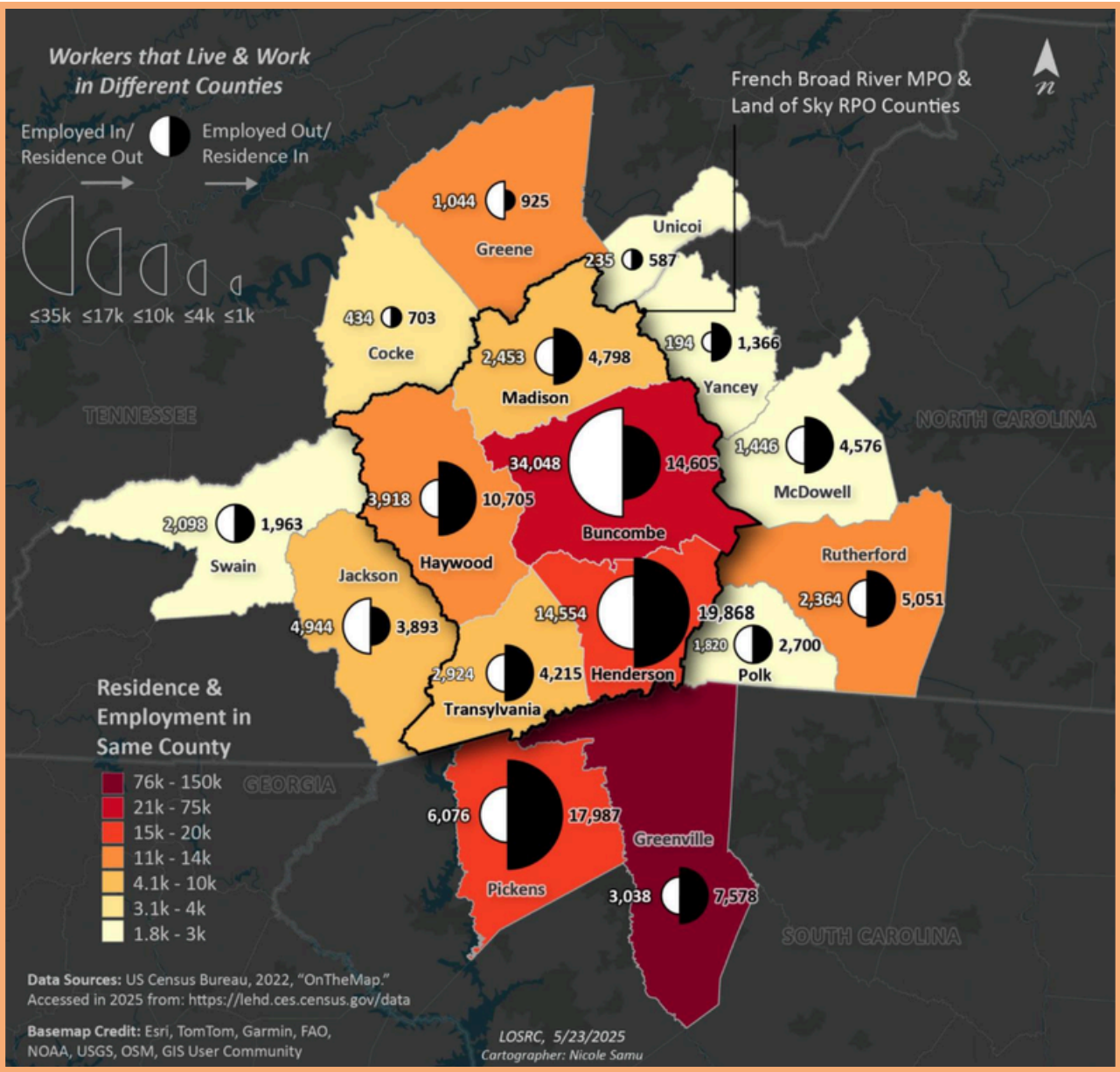


Figure 2. Map of where people live and work across the FBRMPO and LOSRPO's planning regions and surrounding counties. (Map Source: FBRMPO, 2025; Primary Data Source: U.S. Census Bureau, 2022).

Workforce Development

The Land of Sky Region is strengthening its position as a competitive, talent-driven economy by aligning workforce systems with the evolving needs of employers in advanced manufacturing, life sciences and health, professional and technical services, and the outdoor and creative products sector. Across Buncombe, Henderson, Madison, and Transylvania counties, more than 210,000 residents participate in the labor force, with labor force participation rates ranging from 56% to 63% depending on the county (U.S. Census Bureau, 2023). Employers consistently highlight the need for adaptable workers who can meet emerging skill demands as the region experiences steady population growth, sector diversification, and an influx of new residents (MAWDB, 2024).

MAWDB and Land of Sky's workforce team continue to advance employer-aligned training and talent pipeline strategies. More than 7,000 residents annually participate in NC Works Workforce System (NCWorks) career services, job matching, or workforce advising (NCDOC, 2024). Over 3,500 high school students participate in Career and Technical Education (CTE) programs aligned with regional industries, and the region maintains one of the state's highest dual enrollment/Career and College Promise (CCP) participation rates at nearly 50% (P20 Council, 2025). Postsecondary persistence is strong, with more than 80% of local graduates continuing into their second year of college (P20 Council, 2025). Adult attainment is equally competitive — roughly 60% of adults ages 25–44 hold a degree or credential, slightly above the state average (myFutureNC, 2025).

State-level partners provide critical support. ApprenticeshipNC has expanded industry-sponsored apprenticeships across the region, particularly in advanced manufacturing, healthcare, and skilled trades (NC Community College System, 2024). NCWorks continues to match thousands of job seekers and employers through workforce centers and online services (NCDOC, 2024).

The region faces challenges that influence labor force participation: housing costs, childcare shortages, transportation gaps, and retirements among older workers (NCBTC, 2025). Commuting data (Figure 2) shows that a significant portion of Buncombe County workers live outside the county, and many county residents commute elsewhere for work. These trends reflect workforce housing shortages near major job centers (Bowen National Research, 2025).

By deepening employer collaboration, expanding work-based learning, and improving access to education and training, the Land of Sky Region can sustain a resilient and future-ready workforce (MAWDB, 2024).



Image Credit: Asheville Pictures.

Environment and Natural Resources

The Land of Sky Region is situated in the Southern Appalachian Mountains, where steep ridges, broad river valleys, and extensive public lands shape both rural and urban communities. Unlike the flatter, more densely developed Piedmont and Coastal Plain regions of North Carolina, this area is defined by its mountainous terrain, high elevations, and abundant headwater streams. Figure 3 illustrates the elevation relief and major topographic features of the Land of Sky Region and surrounding areas. These natural features influence land use, transportation, infrastructure design, and water supply while sustaining ecological systems relied upon by downstream communities.

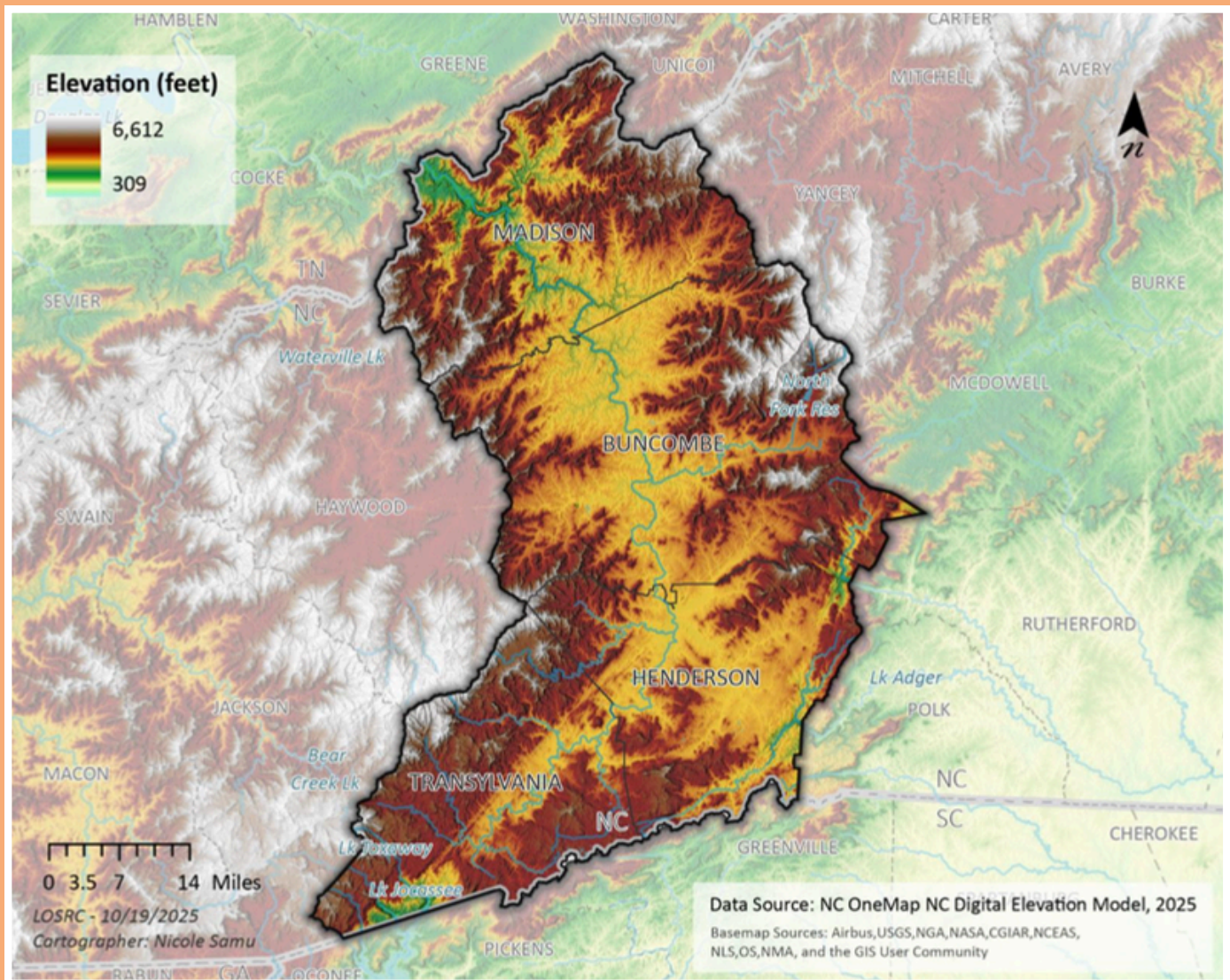


Figure 3. Elevation relief map characterizing the topography of the Land of Sky Region and surrounding areas (Map Source: LOSRC, 2025; Primary Data Source: NC OneMap, 2025).

Forests, rivers, water resource systems, and valleys provide essential ecosystem services, including dependable drinking water, fertile soils, flood protection, recreation opportunities, and cultural value. Tropical Storm Helene underscored the importance and vulnerability of these systems by causing significant disruption across the region. (Duke Energy, 2024; NC OSBM, 2024b). These events reinforce the need for managing forests, headwaters, and floodplains not only for environmental stewardship, but also for disaster preparedness, quality of life, and long-term economic resilience.

Water Resources

The region's water resources originate in high-elevation headwaters that feed the French Broad River—one of the few rivers in North Carolina that flows northward toward the Mississippi River Basin. Thousands of miles of streams, creeks, and tributaries carve through the landscape, providing dependable surface and groundwater for residents, farms, businesses, and ecosystems. (NC CGIA, 2024; USGS, 2024). Figure 4 shows major surface water systems, reservoirs, and intake locations across the region.

Water supply is delivered through a combination of public utilities and private wells. Larger systems—such as Asheville and Hendersonville—depend on reservoirs and river intakes, while Brevard, Rosman, Marshall, Mars Hill, and Hot Springs and other communities rely on smaller surface sources or wells. Many rural homes and businesses depend on private wells (NCDEQ, 2024a). Watershed protection areas across the region are regulated under the NC DEQ Water Supply Watershed Protection Program.

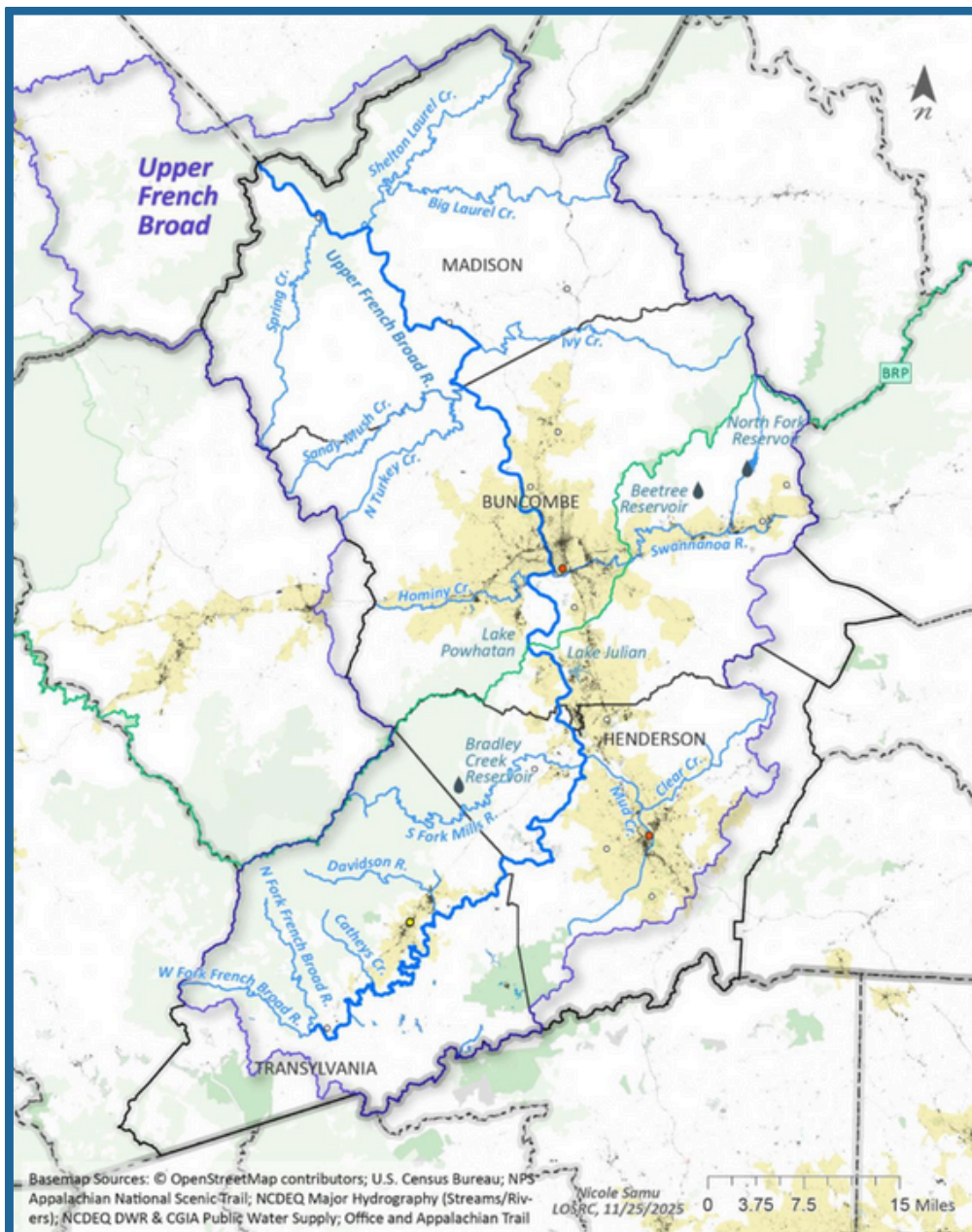


Figure 4: Overview map of major surface water systems in the Land of Sky Region. (**Map Source:** LOSRC, 2025; **Primary Data Sources:** NCDEQ & CGIA Major Hydrography, 2022; NCDEQ DWR & CGIA, 2022; USGS WBD, 2025).

Flooding is one of the region’s most significant risks to water infrastructure. During Tropical Storm Helene, extreme rainfall damaged water intakes, eroded streambanks, inundated pump stations and treatment facilities, and contaminated private wells (NCDHHS, 2024; NCEM, 2024; NC OSBM, 2024b; NOAA NCEI, 2024). Larger utilities experienced boil-water advisories lasting up to two weeks, while smaller systems with limited redundancy faced even longer service disruptions.

Flooding during Helene also exposed limitations in existing hazard mapping. Figure 5 shows FEMA’s regulatory Flood Insurance Rate Map (FIRMs) and North Carolina Emergency Management’s (NCEM) advisory floodplain map. FEMA’s regulatory floodplains define legally adopted flood hazard areas used for permitting and insurance, while NCEM’s advisory floodplains provide higher-resolution, non-regulatory flood risk information to guide planning, mitigation, and emergency management. In many areas, observed flooding during Helene extended far beyond these mapped boundaries (FEMA, n.d.; NCEM, 2024).

These discrepancies highlight the need for up-to-date hydrologic modeling and locally verified data to support resilient water resource planning.

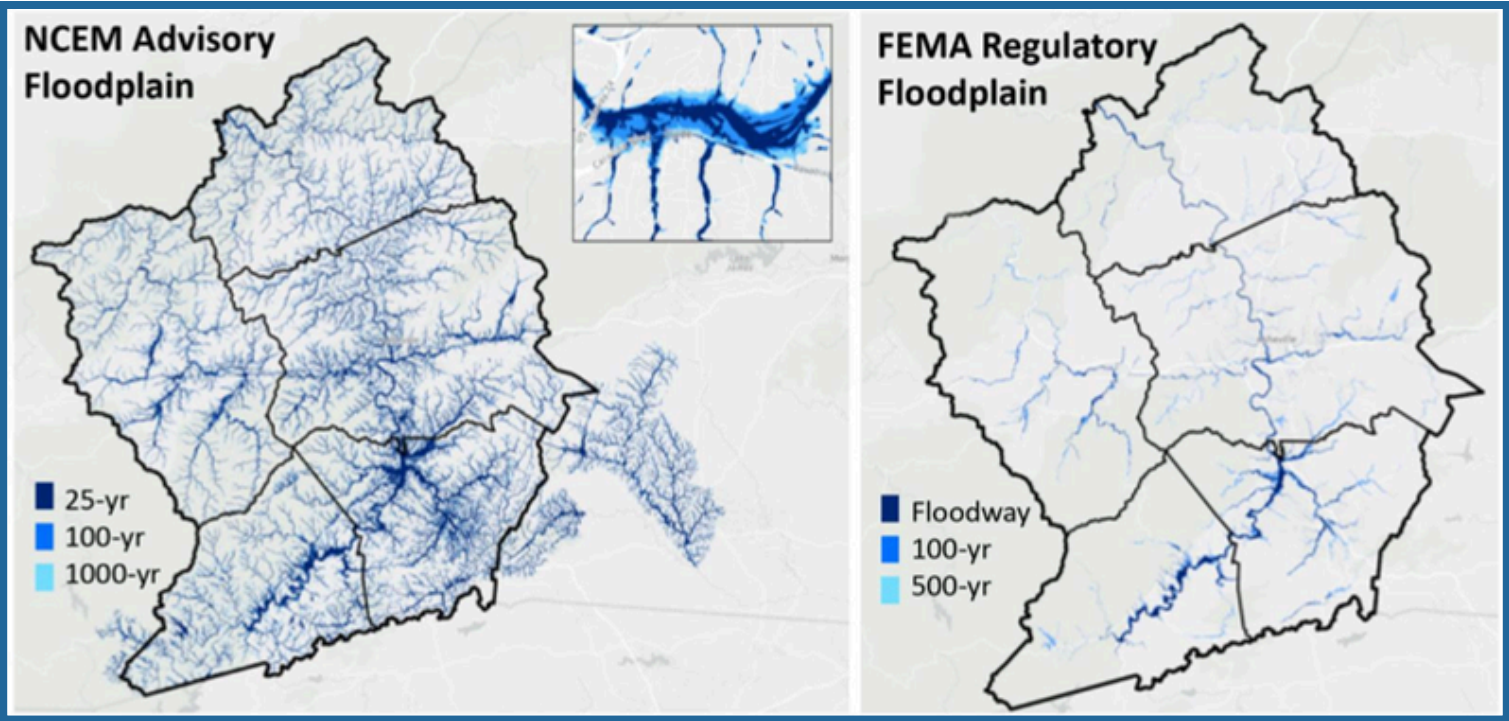


Figure 5. FEMA’s regulatory DFIRM floodplains and NCEM’s advisory floodplains within the LOSRC’s MPO and RPO Transportation Regions, illustrating differences between legally adopted (insurance and permitting) flood hazard areas and updated state-modeled flood extents used for planning and risk assessment. (**Map Source:** LOSRC, 2025; **Primary Data Sources:** FEMA DFIRM, 2025; NCEM FRIS, 2025).

Forests

Forests dominate the Land of Sky Region, covering approximately 72% of the landscape (Dewitz, 2023). Public lands—including Pisgah National Forest, DuPont State Recreational Forest (DuPont SRF), National Park Service (NPS) land encompassing the Blue Ridge Parkway, and state and local preserves—anchor recreation, biodiversity, and regional water supplies. Figure 6 shows dominant forest types and the extent of forest cover across the region.

Forests support slope stability, regulate streamflow, store carbon, and underpin a major outdoor recreation economy. The Blue Ridge Parkway alone attracts more than 16 million annual visitors and supports more than 17,000 jobs in nearby communities (NPS, 2023; NPS, 2024a). Trail systems in Pisgah National Forest, DuPont SRF, Gorges State Park, Bent Creek Experimental Forest, and NPS land attract hikers, cyclists, anglers, hunters, and visitors from within and outside the region.

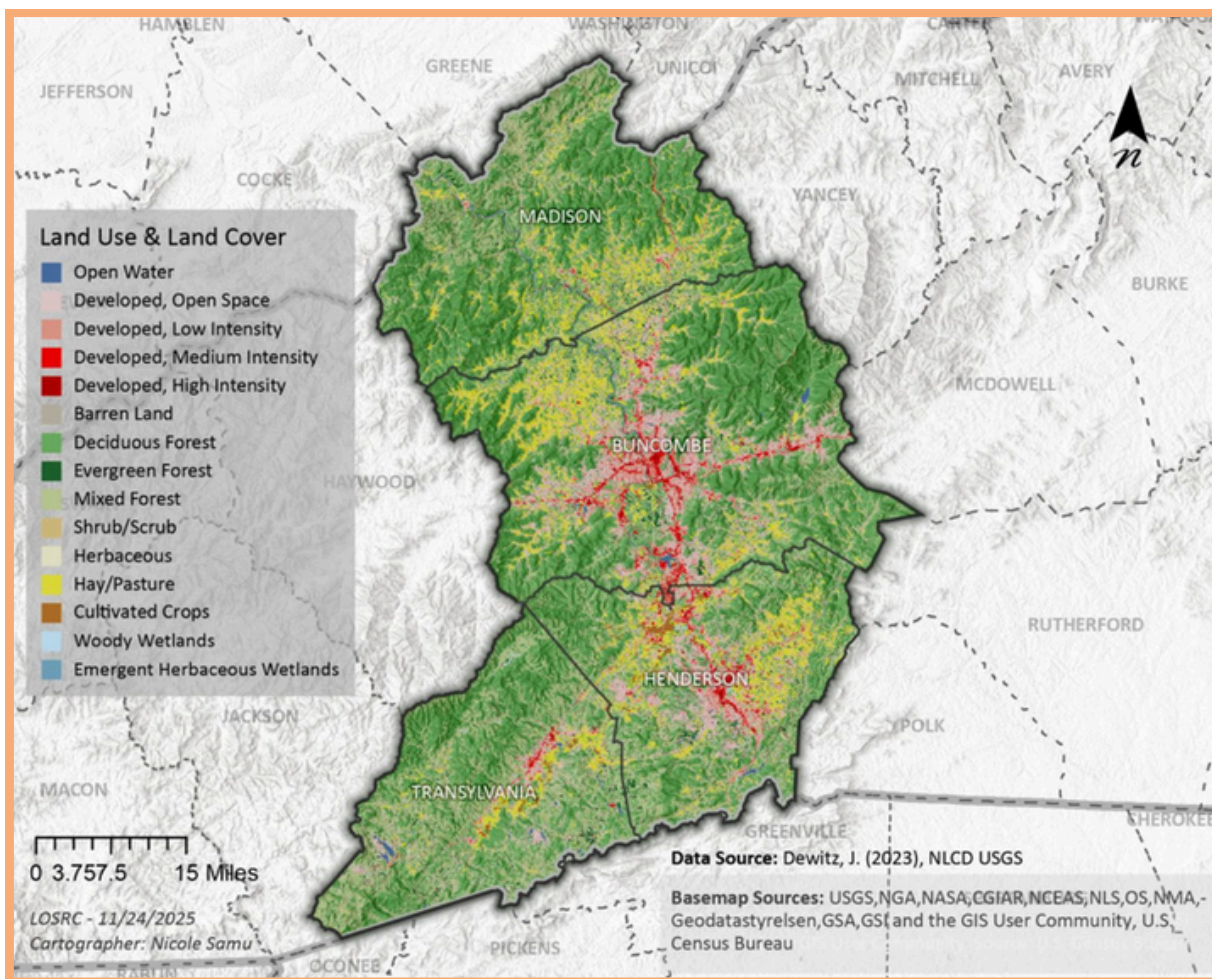


Figure 6. Forests are the dominant land use and land cover type of the Land of Sky Region. (**Map Source:** LOSRC, 2025; **Primary Data Source:** Dewitz, J. 2023).

Tropical Storm Helene highlighted forests' dual role in resilience and vulnerability. Extensive blowdowns, uprooted trees, and debris accumulation increased landslide and debris-flow risk, blocked trails and forest roads, and slowed emergency response efforts (NCDEM, 2024). These impacts underscore the importance of proactive forest management, reduced fragmentation, and resilient development practices for long-term safety and economic vitality.

Agriculture

Agriculture remains a central part of the region's economic and cultural identity. Fertile valley bottoms support pastureland, orchards, nurseries, vineyards, and vegetable farms. Although agricultural land constitutes a modest share of each county's area—approximately 5% in Transylvania County and nearly 19% in Buncombe County—it contributes significantly to employment, food systems, and agritourism (NCDA&CS, 2024; USDA NASS, 2022). Figure 7 shows agricultural land distribution across the four counties, totaling over 165,200 acres of farmland in the region.

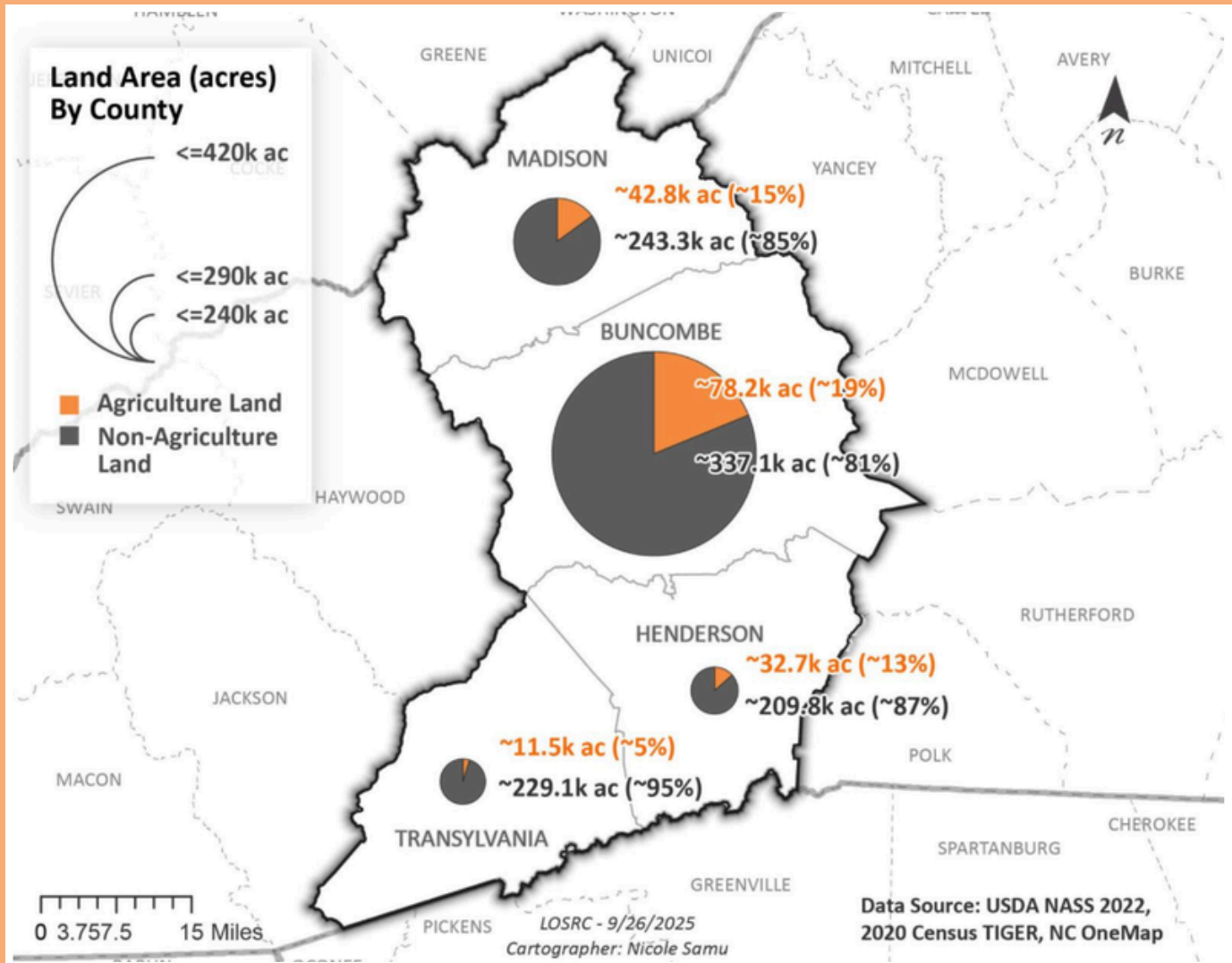


Figure 7. Agricultural land by county in the Land of Sky Region. (Map Source: LOSRC, 2025; Primary Data Source: USDA NASS, 2022).

Henderson County is North Carolina's top apple-producing county, accounting for the majority of the state's commercial apple output. The U.S. Department of Agriculture's (USDA) Census of Agriculture data confirms that the county leads the state in orchard acreage and fruit production, supported by a network of growers, packers, seasonal workers, and agritourism activities (USDA NASS, 2022).

Local industry partners estimate that the apple sector contributes approximately \$25–\$35 million annually to the county’s economy through production, processing, packing, and seasonal visitor activity—including U-pick orchards, fall festivals, and roadside markets that attract visitors from across North Carolina (NC Apple Festival, n.d.; NCDA&CS, 2024). These activities strengthen the region’s agricultural economy while supporting small businesses and preserving working lands.

When Tropical Storm Helene struck the region, agricultural valleys experienced extensive flooding that scoured soils, damaged irrigation systems, and destroyed crops across multiple watersheds. The USDA Farm Service Agency issued Secretarial Disaster Designations for all four counties in recognition of significant agricultural losses (USDA FSA, 2024). State assessments further documented long-term soil rehabilitation needs, debris removal challenges, and substantial infrastructure repair requirements affecting farms throughout the region (NCDA&CS, 2024; NC OSBM, 2024b).



Image Credit: Asheville Pictures.

Ecosystems and Biodiversity

The Land of Sky Region lies within the Southern Appalachians—one of the most biologically diverse regions in the eastern United States. Protected lands such as Pisgah National Forest, Gorges State Park, DuPont State Recreational Forest, the Blue Ridge Parkway, and other surrounding remote and urban wilderness areas sustain this biodiversity by maintaining intact forests, water resource systems, and wildlife habitat (USFS, 2024; NPS, 2023; NCSP, 2024). These interconnected natural systems provide essential ecological services to communities and visitors across the region—such as clean drinking water, slope stability, carbon storage, flood mitigation, and local temperature regulation.



Image Credit: Asheville Pictures.



Image Credit: Asheville Pictures.

Recreation access across these landscapes is extensive and varied. Hot Springs serves as a nationally recognized gateway to the Appalachian Trail. Buncombe County includes heavily visited segments of the Blue Ridge Parkway (NPS, 2023); Henderson County blends agricultural valleys with greenways, Pisgah National Forest, and state game lands (FBRMPO, 2025; USDA NASS, 2022; USFS, 2024); and Transylvania County is known as the “Land of Waterfalls” due to its high concentration of publicly accessible cascades (USFS, 2024; NCDNCR, 2023). Figure 8 illustrates key wilderness areas, forestland, and recreational assets across the region.

Tropical Storm Helene exposed vulnerabilities within these ecosystems. High winds and extreme rainfall caused canopy loss, blowdowns, landslides, and debris flows that damaged trails, blocked access roads, and disrupted operations across Pisgah National Forest, the Blue Ridge Parkway, and multiple recreation sites (NCDEM, 2024; NPS, 2024b). While ecological recovery is ongoing, these impacts show how degraded forest conditions, slope instability, and damaged access corridors collectively affect community safety, water quality, recreation access, and local economies. Healthy ecosystems are therefore foundational to the region’s environmental stability, public safety, and long-term economic resilience.

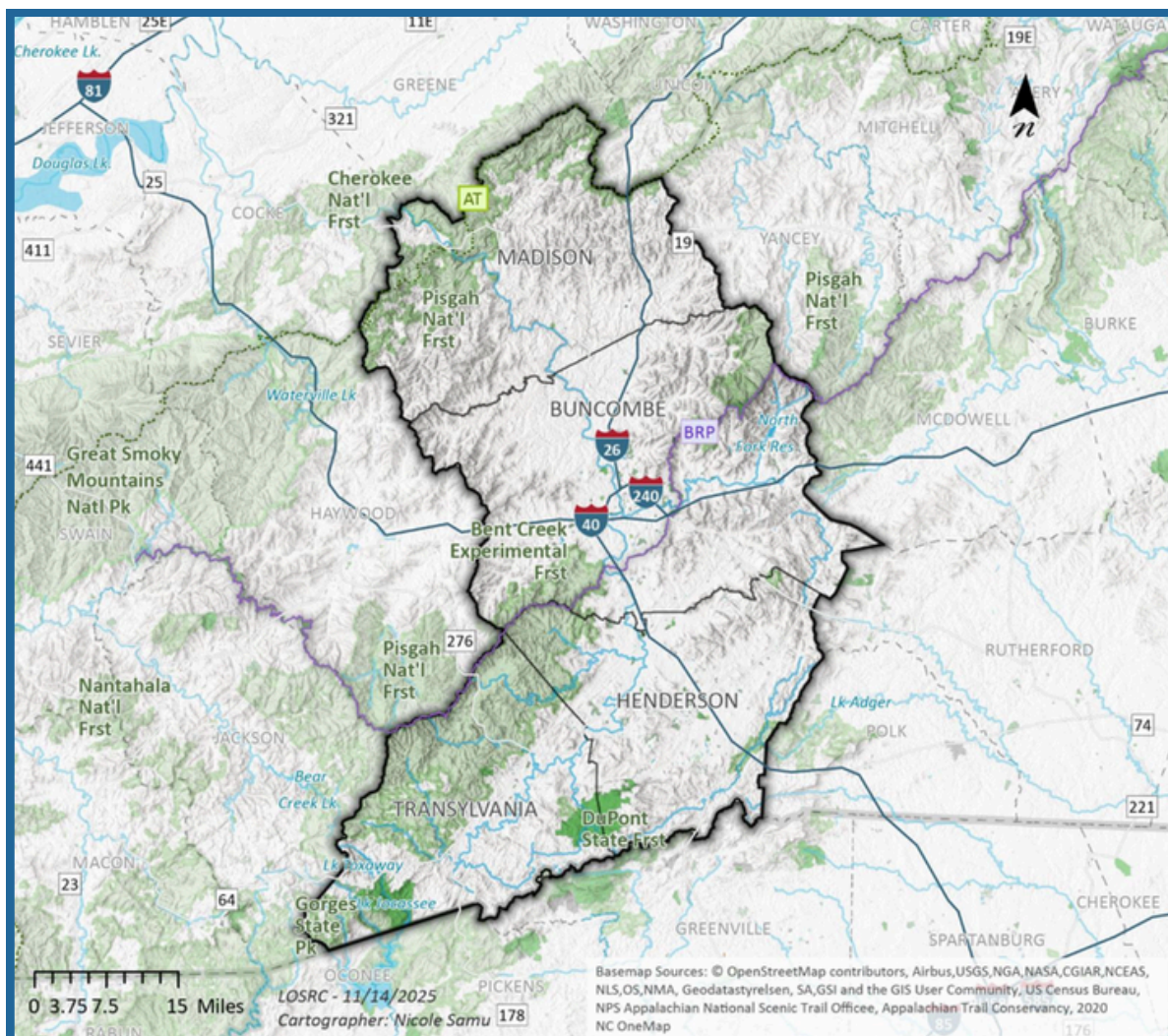


Figure 8. Overview map of major public wilderness areas and topography within and beyond the Land of Sky Region. (**Map Source:** LOSRC, 2025).

Floodplains and Hydrologic Risk

The French Broad River and its major tributaries create substantial flood risk due to steep upstream watersheds and narrow valley channels. Low-lying communities, transportation routes, and aging stormwater systems face heightened vulnerability during intense rainfall events.

FEMA's 100- and 500-year floodplain maps (FIRMs/DFIRM) and NCEM's flood advisory layers (Figure 5, section 3.4.1.) provide baseline hazard identification (FEMA, n.d.; NCEM, n.d.). However, during Helene, observed inundation exceeded mapped boundaries in many areas—indicating the need for updated hydrologic modeling, locally verified flood data, and resilient land-use strategies (NCEM, 2024; NC OSBM, 2024; NOAA NCEI, 2024).

These insights shape future planning for water, sewer, stormwater, and transportation investments across the region.

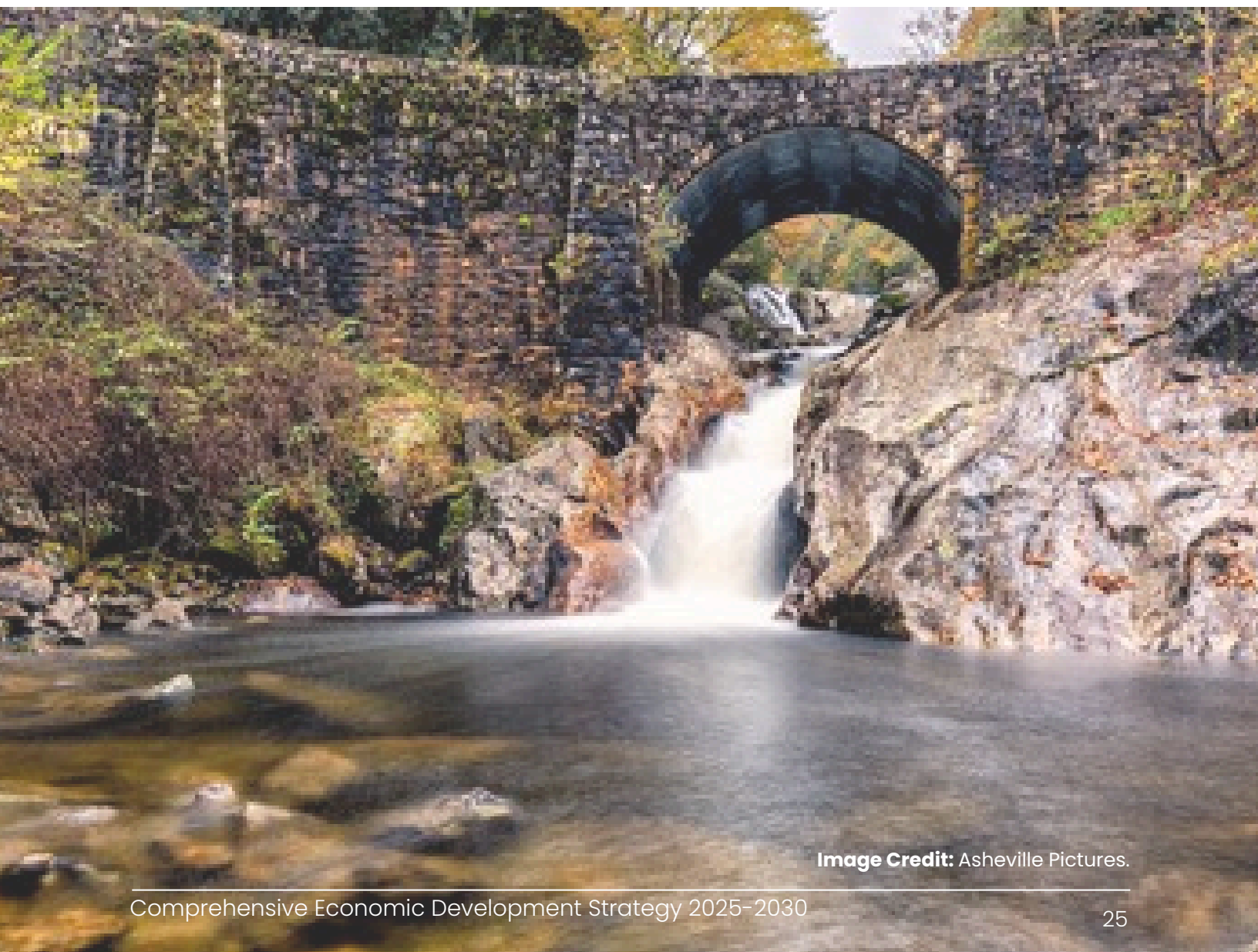


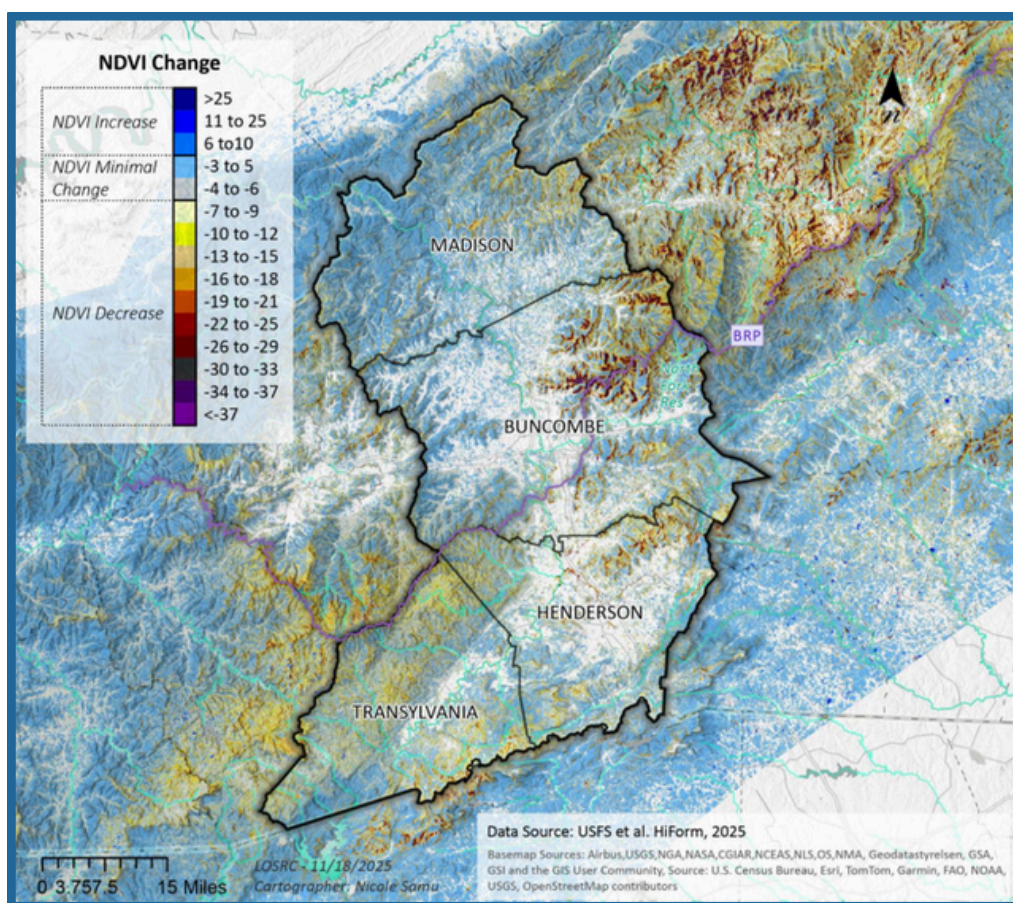
Image Credit: Asheville Pictures.

NATURAL HAZARDS AND TROPICAL STORM HELENE

The region faces ongoing hazards from flooding, landslides, wildfires, severe weather, winter storms, and drought (NOAA NCEI, 2024). Tropical Storm Helene caused widespread damage across the region, exposing critical vulnerabilities across communities, infrastructure systems, and natural environments.

Vegetation Loss and Slope Stability

Tropical Storm Helene caused extensive forest damage across the entire Land of Sky region, affecting wilderness areas as well as fragmented forests within neighborhoods, open-space zones, and urban-suburban canopy. Extreme winds, saturated soils, and prolonged rainfall uprooted trees, snapped trunks, thinned canopies, and produced widespread blowdowns (NOAA NCEI, 2024). Steep slopes also experienced landslides and debris flows that stripped vegetation to bare soil, while lower-slope and valley communities experienced notable canopy loss, demonstrating that impacts were not confined to ridge systems.



Pre- and post-Helene vegetation change was assessed using NDVI (Normalized Difference Vegetation Index), comparing October 2023 and October 2024. NDVI measures vegetation greenness: negative differences indicate reduced greenness or canopy loss; near-zero values reflect little change, and positive values often represent seasonal differences or understory response. A forest-only mask isolates changes in woody vegetation, as visualized in Figure 9 using the HiForm dataset (USFS HiForm, 2025).

Figure 9. NDVI change (Oct 2023–Oct 2024) across woody vegetation, showing areas where greenness declined following Tropical Storm Helene. Blue indicates slight seasonal increases; gray, little change; and yellow–red–purple, increasing vegetation loss. All counties display widespread deep red/purple values, reflecting severe damage across wilderness forests, fragmented patches within residential areas, open-space zoning, and urban and suburban tree canopy. (Map Source: LOSRC, 2025; Primary Data Source: HiForm, 2025)

Analysis of NDVI change across the four counties shows a region-wide pattern of vegetation loss, with both localized high-severity impacts and widespread low-to-moderate canopy decline. Every county contained areas with severe NDVI decreases (values < -26), while also exhibiting broad zones of mild and moderate decline across slopes, ravines, headwaters, and forested residential areas. Table 1 summarizes these patterns.

Table 1. Potential Significant Helene Impacts on Canopy and Woody Vegetation based on Pre- and Post-Helene HiForm NDVI values.

County	Total Assessed Acres	Mild (-7 to -12)	Moderate (-13 to -18)	Large (-19 to -25)	Severe (< -26)	Summary
Buncombe	274,615	23.80%	8.40%	4.10%	3.20%	Most extensive and severe forest disturbance in the region, with the largest total area and highest concentration of major canopy loss. High-elevation ridges—Big Ivy, Elk Mountains, Craggy Mountains, and Blue Ridge Parkway corridor—contain some of the most severely impacted forests seen anywhere in WNC.
Transylvania	206,947	37.40%	7.80%	1.40%	0.30%	NDVI pattern indicates widespread, low-moderate canopy reduction across many headwater and high-elevation forests, rather than a small number of high-severity pockets.
Henderson	239,796	31.00%	7.90%	2.70%	1.30%	Substantial mild-moderate canopy loss across a large share of its forests. While not as concentrated as Buncombe's, the impacts are significant and distributed across multiple ridges and upper-watershed areas.
Madison	149,249	18.90%	3.50%	0.80%	0.30%	Lowest proportion of high-severity loss, but still experienced notable canopy decline along exposed ridgelines. These ridgecrest impacts stretch across long, remote terrain and contribute meaningfully to regional disturbance patterns.

The NDVI data reveal severe canopy declines (deep red and purple NDVI values) in every county, as illustrated earlier in Figure 9 and below in Figure 10. High-elevation tracts—including portions of the Big Ivy/Coleman Boundary area, Elk and Craggy Mountains, and the Blue Ridge Parkway corridor—exhibited some of the most pronounced losses (Figures 9 and 10). However, Figure 9 also shows large contiguous areas of high-magnitude decline across upper and mid-elevation slopes, wooded residential areas, and valley-bottom forests in all four counties. These patterns indicate region-wide forest disturbance affecting both intact wilderness areas and fragmented urban/suburban canopy.

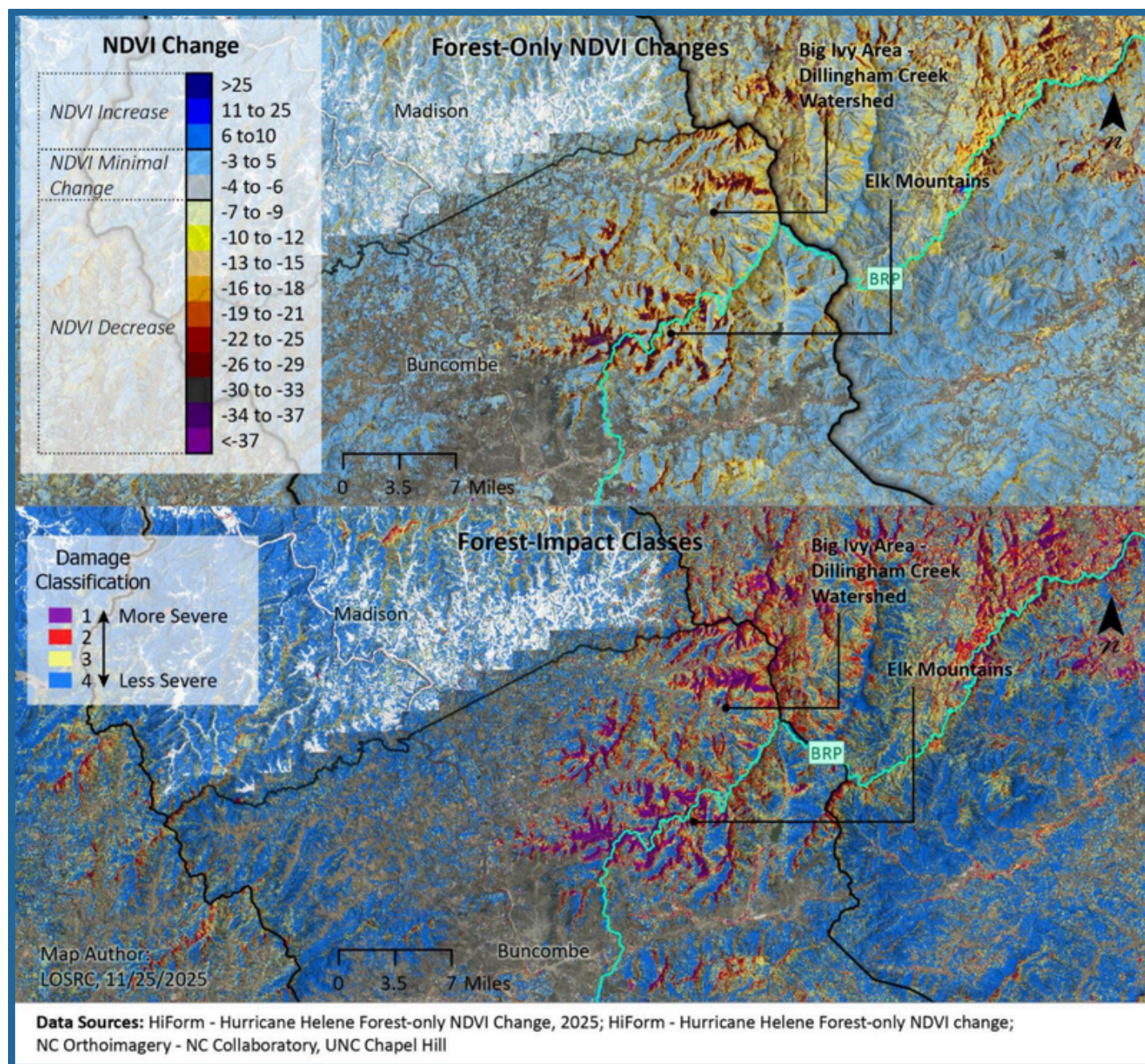


Figure 10. HiForm Forest-only NDVI and Impact Classes show severe forest damage from Tropical Storm Helene to the Land of Sky Region's woody vegetation in the Elk Mountains, Big Ivy area, Blue Ridge Parkway Corridor, ridgelines of Madison County, and patches within Henderson County. Forest impact classes in the bottom map characterize damage as follows: 1) large-gap blowdowns, 2) heterogeneous areas with severe or mixed damage, 3) scattered low severity or broad light impacts that are non-structural, 4) no/minor impacts. (**Map Source:** LOSRC, 2025; **Data Source:** USFS HiForm, 2025)

It is also important to note that positive NDVI change does not necessarily represent ecological recovery. NDVI reflects greenness but cannot distinguish between returning forest canopy and regrowth dominated by understory or early successional species. Research shows that NDVI “recovery” may not align with actual tree regeneration, forest structure, or slope stability (Buma 2011; Buma 2021). Thus, NDVI gains should be interpreted cautiously.

Figures 11 and 12 further illustrate these impacts with detailed views from Big Ivy, Elk Mountain, and other high-impact locations. These conditions increased slope instability and contributed to landslides, debris flows, blocked culverts, and downstream flooding hazards.



Figure 11. This photo was taken on Elk Mountain just east of the intersection of Elk Mountain Scenic Highway and Sassafras Gap Road, looking north in the mid-morning of Oct. 27, 2024. This shows high severity blowdown from Helene on private forest land. **(Photo credit:** Steve Norman, USDA Forest Service Southern Research Station, 2024).

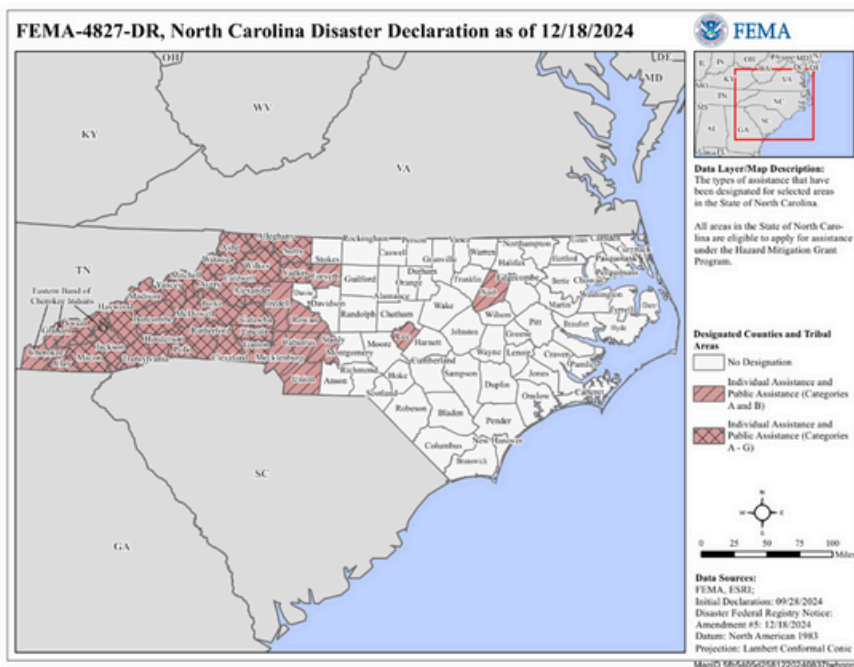
Urban Forest Impacts



Urban areas also suffered significant canopy loss, which damaged homes, roads, and power infrastructure. Figure 12 provides a ground-level view of urban forest damage in Buncombe County.

Figure 12. Ground perspective photos of Tropical Storm Helene impacts on urban forests – Buncombe County, NC. Top left: taken Sat Sept. 28, 2024, at 160 Flint St in Montford showing an uprooted tree that fell on the historic district structure; Top right: taken at the Carrier Park entrance on Amboy Rd on Oct 5, 2024. Bottom left: taken on Elk Mountain just east of the intersection of Elk Mountain Scenic Hwy and Sassafras Gap Rd, looking north in the mid-morning of Oct. 27, 2024. This shows a high severity blowdown from Helene on private forest land. Bottom right: taken not far downstream of Pierson’s Bridge on the French Broad along the heavily damaged railroad tracks on Oct. 13, 2024. **(Photos Credit:** Steve Norman, USDA Forest Service Southern Research Station, 2024)

Community Damage and FEMA Assistance



All four counties in the Land of Sky Region received FEMA disaster assistance after Helene, reflecting widespread impacts to homes, farms, businesses, and critical infrastructure (FEMA, 2024b). Figure 13 maps FEMA-designated assistance areas across WNC.

Figure 13. WNC counties receiving FEMA assistance for Tropical Storm Helene damage **(Map Source:** FEMA, 2024c).

Utilities and Communications

Helene severely impacted water and sewer systems. Damage included (NCDHHS, 2024; NC OSBM, 2024b):

- Inundated treatment facilities
- Broken intakes
- Contaminated private wells
- Sewer overflows
- Damaged pump stations
- Prolonged boil-water advisories

Widespread fiber breaks, cell tower damage, and broadband outages disrupted both public communications and 911 routing, particularly in rural communities (FCC, 2024; NCEM, 2024). Figure 14 shows water system repair crews reconnecting Buncombe County's water supply 53 days after Helene hit, illustrating the prolonged recovery period caused by damaged intakes, blocked access, and limited power resilience.



Figure 14. T and K Utilities crew connecting Asheville's water supply 53 days after Tropical Storm Helene (Photo Credit: Taylor Howard).

Transportation and Mobility Impacts

Flooding and landslides closed major corridors—including I-26, I-40, U.S. 25, NC 191, and multiple sections of the Blue Ridge Parkway—as well as numerous local, private, park-access, and other non-state-maintained roads.

Early North Carolina Department of Transportation (NCDOT) situation reports documented hundreds of closures on the state highway system in WNC, but comprehensive data on locally maintained roads was not available (NCDOT, 2024a; NPS, 2024b). These gaps were identified by the FBRMPO, LOSRPO, local governments, and North Carolina's Working Group for Enhanced Emergency Response (WGEER), and were likely recognized by other agencies relying on timely road-status information during the response. Following Helene, WGEER led a statewide, multi-agency effort to evaluate road-closure data collection, reporting, and sharing needs for elevated emergency-response scenarios.

Local governments and the FBRMPO attempted to track closures independently; however, limited staffing, inconsistent tools, and the absence of standardized reporting systems resulted in fragmented information across jurisdictions and duplicated ad-hoc data collection efforts.



Image Credit: National Park Service.

The Road Information Program (TRIP) later summarized NCDOT's damage assessment and estimated that Hurricane Helene caused approximately 1,400 state-maintained road closures and 818 damaged state-maintained bridges across WNC, highlighting the scale of systemwide disruption and the challenges faced by emergency responders, commuters, freight carriers, and service providers (TRIP, 2025).

Many local routes remained blocked for weeks or longer, limiting (TRIP, 2025):

- Freight movement
- Commuting and workforce access
- Public transit operations
- Emergency response and medical transport
- School transportation
- Deliveries and supply-chain operations
- Access to essential services and utilities
- Resident and visitor travel

Economic and Workforce Impacts

Helene caused an estimated \$1.757 billion GDP loss in the Asheville metro during the fourth Quarter of 2024 (NC OSBM, 2024b). Hospitality unemployment claims rose from 84 to nearly 4,000 in a single month due to closures in food service, retail, and tourism (NCDOC, 2024). Rural communities with limited redundant systems and aging infrastructure experienced the longest recovery times.

Coordination Challenges and Innovations

The storm highlighted weaknesses in:

- Interagency communication
- Infrastructure and outage data sharing
- Emergency dispatch reliability
- Coordinated debris management
- Real-time road closure reporting
- Lack of redundancy in key infrastructure
- Communications systems

However, new approaches—such as Buncombe County’s post-storm drone assessments—demonstrated the value of shared tools and regional coordination (Buncombe County, 2025; UNC Collaboratory, 2025).



Land Use and Development Patterns

Helene also demonstrated how development patterns influence hazard exposure. Much of the region’s housing and infrastructure lies in narrow valleys, steep hillsides, and areas adjacent to waterways. These areas often lack modern stormwater systems, redundant power supply, and updated hazard-informed development standards.

Legacy development—such as historic home placement in floodplains or early road corridors built along steep slopes—contributed to damage severity. As the region grows, new development increasingly moves into hillside forests, rural headwater areas, and transportation corridors with limited capacity (NC OSBM, 2024b).

Proactive land-use planning is essential to reducing long-term vulnerability. Incorporating updated hazard maps, slope-stability analysis, modern building codes, and resilient stormwater design into local development decisions will help lower recovery costs and protect public safety.

Aligning land-use policies, housing strategies, watershed protection, and transportation planning will strengthen the region’s long-term resilience and competitiveness.

SWOT ANALYSIS

Strengths, Weaknesses, Opportunities, and Threats

SWOT analysis is a powerful tool to exploit opportunities and minimize threats, using relevant data to determine the regional picture and point in future directions. The below graphic identifies prioritized items from the Land of Sky SWOT analysis that highlight the region's competitive cultural, economic, technological, intellectual and physical assets, as well as its challenges. These elements were used to develop strategic goals and objectives for priority action over the next five years.

Process

We utilized the feedback of 366 participants from our community survey to inform the foundation of a SWOT which we brought to 10 community meetings with 98 total participants that were focused on various aspects of community life. These meetings included the Area Agency on Aging (AAA) board meeting, WNC Initiative for Supportive Housing and Transportation (WISHT) Collaborative Housing meeting, FBRMPO Planning Board, P20 Council, and other focus groups. The CEDS Steering Committee assisted in consolidating and finalizing the SWOT. You can find a copy of the comprehensive results in Appendix G. The following graphic in Figure 15 reflects the final consolidated SWOT.

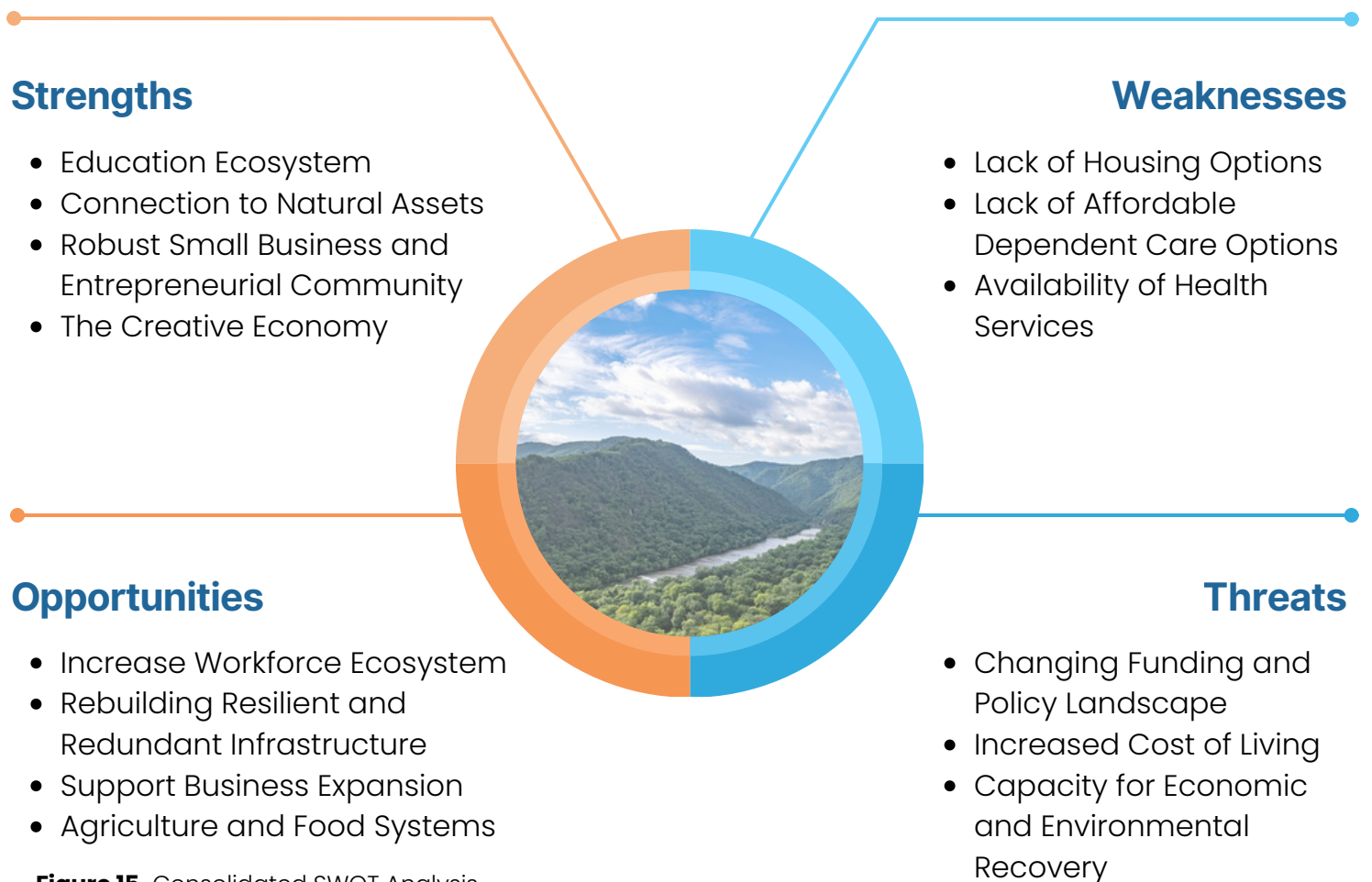


Figure 15. Consolidated SWOT Analysis.

01 Strengths

Education Ecosystem

The Land of Sky Region benefits from a robust and diverse educational ecosystem that supports lifelong learning, talent development, and upward mobility through strong alignment among K–12 systems, postsecondary institutions, and workforce partners. Buncombe County anchors this ecosystem with Asheville–Buncombe Technical Community College (A–B Tech), Lenoir–Rhyne University’s Asheville Center, Montreat College, UNCA, Warren Wilson College, and Western Carolina University’s Biltmore Park instructional site, all of which collaborate with employers to create talent pathways in technology, healthcare, education, environmental sciences, and the arts (Buncombe County, n.d.). In Henderson County, Blue Ridge Community College works closely with local school systems and regional industries to meet demand in advanced manufacturing, mechatronics, and healthcare fields (Blue Ridge Community College, 2024). In Transylvania County, Blue Ridge Community College’s Transylvania Campus and Brevard College strengthen pathways in outdoor leadership, agricultural sciences, music, education, and business, all of which align with the county’s outdoor and cultural economy. Madison County is home to Mars Hill University and A–B Tech Madison, which expand regional access to programs in nursing, teacher education, business, and social sciences while supporting workforce needs across rural communities (Madison County Chamber of Commerce, n.d.). Across the region, education partners collaborate with NCWorks, MAWDB, and local school districts to align CTE, apprenticeships, and work-based learning programs with employer demand (MAWDB, 2024; NCDOC, 2024).



According to the Reaching Our Goals attainment report, the Land of Sky Region demonstrates strong outcomes, including a 92% high school graduation rate, more than 80% second-year postsecondary persistence, and nearly 50% participation in CCP dual-enrollment programs that help students earn college credit and industry credentials while in high school (Figure 16) (P20 Council, 2025). Adult attainment trends further reinforce these strengths, with **roughly 60% of residents ages 25–44 holding a degree or credential slightly above the state average** (myFutureNC, 2025).

Image Credit: Brandon Priester.

These indicators position the region for continued workforce readiness and long-term economic resilience. Together, these assets create an integrated education-to-career ecosystem that gives the Land of Sky Region a sustained competitive advantage in talent development, business expansion, and economic mobility, with ongoing opportunities to co-create industry-aligned educational pathways across the region (P20 Council, 2025).

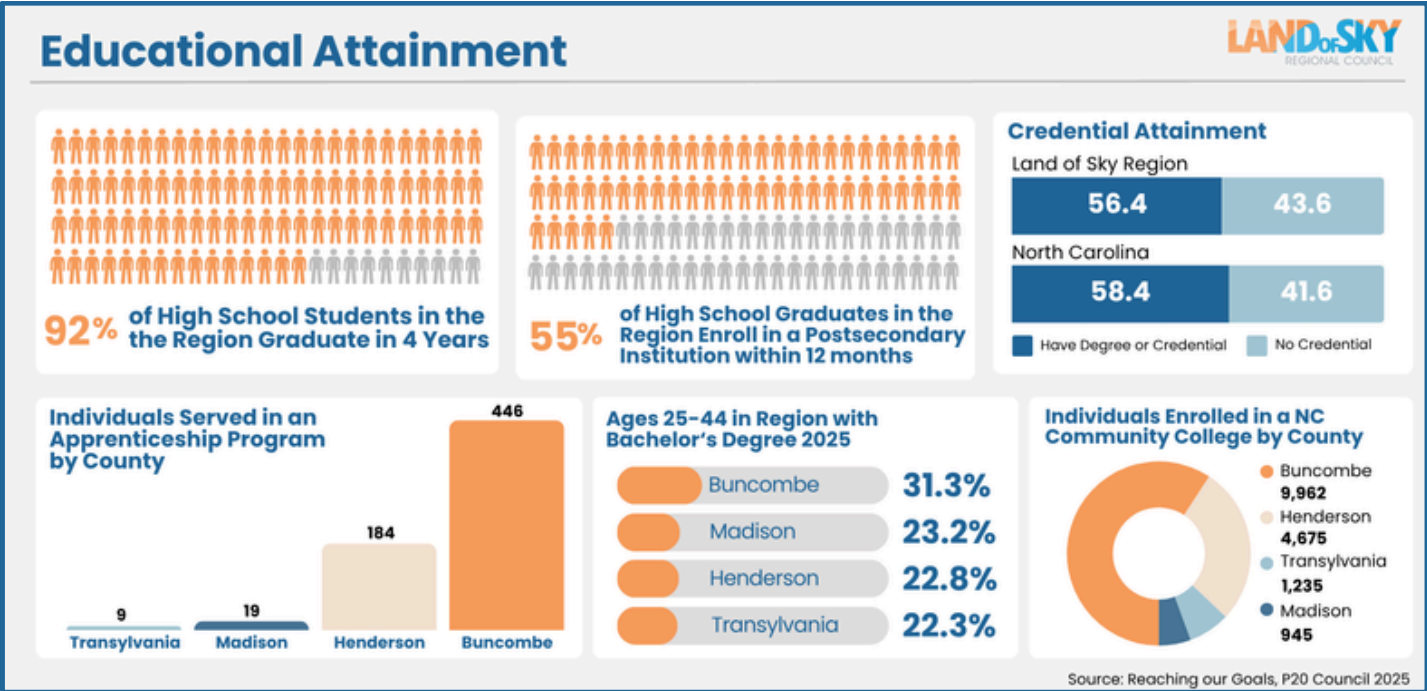


Figure 16. Educational Attainment Profile.

Connection to Natural Assets

WNC’s outdoor economy is a major regional strength that enhances quality of life, fuels entrepreneurship, and generates sustainable economic activity. Anchored by national forests, state parks, blueways, greenways, and the Blue Ridge Parkway, the region benefits from one of the most visited outdoor recreation landscapes in the eastern United States, attracting millions of annual visitors whose spending supports local businesses, lodging, recreation services, guiding and outfitting companies, breweries, restaurants, and cultural venues (NCDNCR, 2023).

In Buncombe County, outdoor recreation alone generates more than a billion dollars in annual visitor spending and supports a large share of small businesses tied to trails, breweries, outdoor gear production, and arts-driven retail (Buncombe County Tourism Development Authority, n.d.).



Image Credit: Transylvania Economic Alliance.

Henderson County's expanding agritourism sector, greenway network, and proximity to DuPont SRF further strengthen its outdoor and hospitality economy (Henderson County, n.d.; Transylvania County Tourism Development Authority, 2024). Madison County leverages the Appalachian Trail, the French Broad River, and an extensive system of rural trails to sustain small businesses such as rafting companies, outfitters, and eco-tourism ventures (NPS, 2024a). Transylvania County: home to Pisgah National Forest and Gorges State Park supports a thriving outdoor industry of gear manufacturers, guiding services, festivals, and downtown businesses tied to Brevard's cycling and trail culture (Transylvania County Tourism Development Authority, 2024).

Across all four counties, the outdoor economy also serves as a gateway into WNC's distinctive craft, music, and cultural identity, linking visitors with local artisans and heritage-based businesses (WNC Arts, 2025). Community survey responses indicate that access to outdoor recreation, natural amenities, and multimodal transportation on greenways is one of the top reasons residents choose to live in the Land of Sky Region, underscoring that natural assets function not only as an economic driver but as a critical tool for talent attraction and long-term retention. Collectively, these outdoor resources strengthen regional competitiveness, attract residents and workers, expand entrepreneurship opportunities, and reinforce place-based economic development rooted in the region's natural landscape (NCDNCR, 2023).

Robust Small Business and Entrepreneurial Community

The Land of Sky Region benefits from a robust small business and entrepreneurial ecosystem that drives innovation, supports new business formation, and strengthens long-term economic resilience. Buncombe County anchors this region with the highest concentration of start-ups, capital networks, incubators, and entrepreneurial support organizations, led by the Asheville-Buncombe County Economic Development Coalition, Mountain BizWorks, Hatch Innovation Hub, and Venture Asheville, which collectively help drive one of the most active small-business climates in North Carolina.



In Henderson County, a growing food-and-beverage sector, downtown revitalization successes in Hendersonville, and targeted small-business programs supported by Blue Ridge Community College and the Henderson County Partnership for Economic Development contribute to steady business expansion.

Image Credit: Transylvania Economic Alliance.

Madison County’s rural entrepreneurial base, particularly in creative trades, agriculture, and outdoor-recreation related enterprises benefit from close-knit networks and technical assistance programs designed to meet the needs of early-stage firms.

Meanwhile, Transylvania County leverages its outdoor and tourism economy, Downtown Brevard’s business environment, and support from organizations such as the Transylvania Economic Alliance to promote small business growth and retention. Across all four counties, business survey data collected by Riverbird Research and Mountain BizWorks in 2025 highlight the region’s collaborative support culture, strong peer-to-peer networks, and place-based entrepreneurship programs remain major draws for founders and small firms. Together, these assets sustain a diverse and resilient entrepreneurial economy (Riverbird Research, 2025).



Image Credit. Transylvania Economic Alliance.

The Creative Economy

WNC’s creative economy is a defining regional advantage that supports small business growth, cultural tourism, and community identity across Buncombe, Henderson, Madison, and Transylvania counties. The region sustains over 17,500 creative-sector jobs and generates more than \$1 billion in annual economic impact, making it one of the strongest craft and maker economies in the country (NCDNCR, 2023). Buncombe County anchors this ecosystem with a dense concentration of makers, studios, galleries, and creative manufacturers connected to Asheville’s nationally known arts and music sector (Asheville Area Chamber of Commerce, 2025). Henderson County’s tourism and agritourism industries strengthen demand for local creative products, while Madison County’s pottery, fiber arts, and Appalachian music traditions reinforce rural cultural assets. Transylvania County contributes through Brevard’s arts community, festivals, and outdoor-linked creative enterprises anchored by the acclaimed Brevard Music Center (Transylvania County Tourism Development Authority, 2024).



Image Credit: Transylvania Economic Alliance.

Regional institutions including the Center for Craft, ArtsAVL, and Craft Your Commerce provide business support, training, and market development that help creative entrepreneurs scale. The sector is also expanding into creative manufacturing, with firms such as East Fork Pottery, Devil's Foot Beverage, and Poppy's Popcorn demonstrating how design and storytelling translate into value-added production and export growth (Fields, 2003). Together, the creative economy enhances quality of life, attracts talent, and strengthens place-based economic development, making it a resilient driver of regional competitiveness.



Image Credit: Transylvania Economic Alliance.

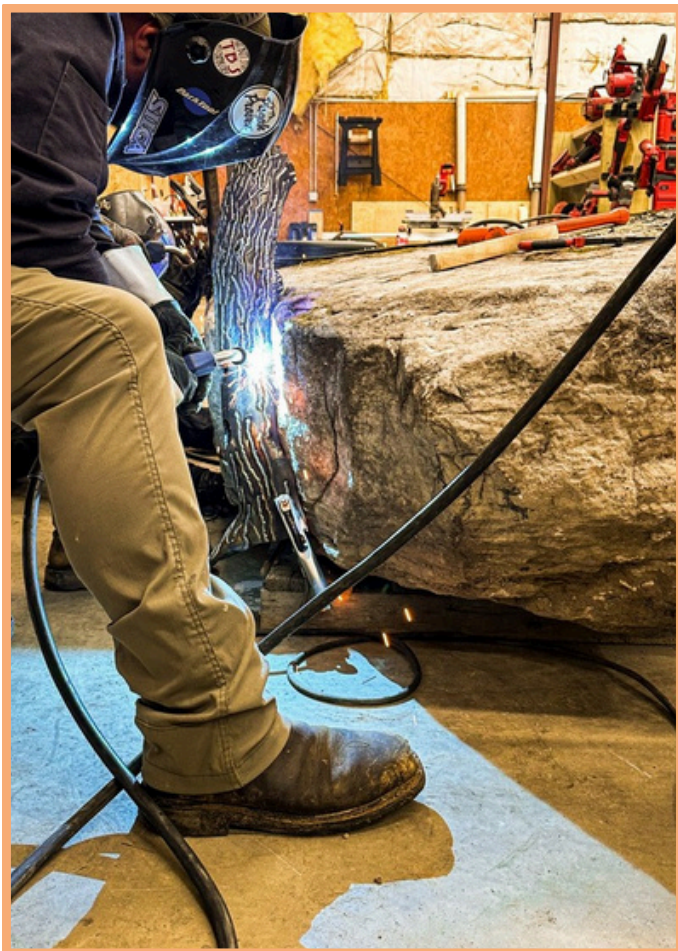


Image Credit: Transylvania Economic Alliance.



Image Credit: Asheville Pictures.

02 Weaknesses

Lack of Housing Options

According to the Asheville Region Housing Needs Assessment, vacancy rates below 3% across the Land of Sky Region severely limit mobility and push many residents into inadequate, overcrowded, or distant housing options (Bowen National Research, 2025). Newly constructed units—particularly those near transit, employment centers, and walkable areas—are priced well beyond what most local households can afford. With mountainous terrain driving up construction costs, the median home price of \$382,769 far exceeds the region’s median household income of \$69,236, restricting access to homeownership for middle-income families (Bowen National Research, 2025; NC HFA, 2024; U.S. Census Bureau, 2023). As a result, 54,824 households are cost-burdened and 23,258 are severely cost-burdened, a challenge that affects renters and homeowners across all four counties (Bowen National Research, 2025; HUD, 2023).

Housing pressures intensified after Tropical Storm Helene. The region will need 34,000 new housing units by 2028 to meet demand driven by population growth and storm-related losses (NC HFA, 2024; NC OSBM, 2024a). FEMA’s January 2025 assessment reported more than 692 homes and rental units destroyed and 13,783 units requiring habitability repairs (FEMA, 2025b). As of early 2025, 257 households remained displaced and dependent on rental assistance (FEMA, 2025b).

Despite these challenges, the region benefits from strong partnerships focused on long-term housing solutions. Advisory groups and organizations such as the WISHT Collaborative, Housing Alliance, Asheville Regional Coalition for Home Repair, county governments, Renew NC, Dogwood Health Trust, and the region’s nonprofit housing developers are working to expand affordable housing, repair damaged homes, and strengthen neighborhood resilience.



Image Credit: Asheville Pictures.

Housing affordability has declined for more than a decade as rents and home values consistently outpace local wages, steep terrain limits developable land, and post-Helene recovery needs grow. Cost burdens are highest in Buncombe and Henderson counties, where demand for both market-rate and affordable units is most intense (Bowen National Research, 2025; HUD, 2023; NC HFA, 2024). Regional planning documents, including the Elevate 2050 Metropolitan Transportation Plan, emphasize that housing form and location are closely tied to long-term affordability, mobility, and resilience. The plan calls for directing new development toward compact, connected, transit-supportive areas to reduce transportation costs and support multimodal travel (Elevate 2050, 2025). Low-density development patterns, by contrast, increase infrastructure and transportation costs for both households and public agencies.

Without coordinated regional strategies to expand affordable housing, enable infill development, modernize infrastructure, and build workforce-aligned units, the region risks continued displacement, longer commutes, widening gaps, and a diminished ability to retain workers and support business growth. Addressing these interconnected housing and transportation challenges is essential to sustaining economic mobility and regional competitiveness.

Lack of Affordable Dependent Care Options

Access to dependent care across the four-county region remains a significant challenge for many families. Only enough licensed infant care spaces exist to serve 7% of the region's infants, creating long waitlists and limiting parents' ability to participate fully in the workforce (Buncombe Partnership for Children, 2024). Senior care options are similarly constrained: vacancy rates remain below national averages, and most assisted living and skilled nursing capacity is concentrated in Buncombe County, leaving Henderson, Madison, and Transylvania counties with very limited availability (LOSRC AAA, 2023). Current projections indicate that regional needs for both early childcare and senior care are unlikely to be met by 2029 (NC Child, 2024a).

Even when care is available, it is often cost-prohibitive. The Buncombe Partnership for Children reports that the average annual cost of infant childcare exceeds \$10,000, placing it out of reach for many working families (Buncombe Partnership for Children, 2024). Similarly, the 2024 Genworth Cost of Care Survey estimates the average monthly cost of eldercare at \$5,769, representing a 44% increase since 2021 (Genworth, 2024). These expenses far exceed what many households can afford given the region's median family income and contribute to declining labor force participation among caregivers.



Image Credit: Asheville Pictures

Several factors have exacerbated this shortage, including pandemic-era disruptions, persistent workforce gaps tied to low wages in the care sector, impacts from Tropical Storm Helene, and the expiration of federal childcare stabilization subsidies in June 2023 (U.S. Chamber of Commerce Foundation, 2024). Between 2023 and 2024, the Land of Sky Region experienced a loss of at least 9 licensed childcare centers, further reducing access for families (NC Child, 2024a). A 2024 U.S. Chamber of Commerce Foundation report estimates that childcare challenges cost North Carolina’s economy \$5.65 billion annually, disproportionately affecting women and lower-wage workers and limiting the region’s ability to support a stable, competitive workforce (U.S. Chamber of Commerce Foundation, 2024).

Availability of Health Services

The availability of health services remains a major regional weakness, particularly as the Land of Sky Region experiences rapid population aging and rising mental health needs. North Carolina’s Aging Profile shows that Buncombe, Henderson, Madison, and Transylvania counties have some of the state’s highest concentrations of older adults, increasing demand for primary care, home health, long-term care, and specialized geriatric services (NCDHHS, 2023). Yet severe workforce shortages in healthcare driven by low wages, retirements, and limited training pipelines reduce the region’s capacity to meet these needs, especially in long-term care facilities, which already face vacancy constraints and uneven geographic distribution (Kaiser Family Foundation, 2024; LOSRC AAA, 2023). Mental health access is even more strained: statewide analyses show persistent gaps in behavioral health providers, with rural areas facing long waits for services or no local providers at all (Center for American Progress, 2024; Kaiser Family Foundation, 2024).

Housing pressures further exacerbate service shortages, as high costs and limited availability near employment centers hinder the recruitment and retention of healthcare and mental health workers (Bowen National Research, 2025). Transportation barriers compound these challenges, limiting patients’ ability to reach providers—particularly older adults and rural residents who rely on long travel times or lack feasible transit options (Elevate 2050, 2025). Tropical Storm Helene intensified these vulnerabilities by damaging facilities, displacing medically fragile residents, and increasing behavioral health needs associated with trauma and long-term recovery (Center for American Progress, 2024; FEMA, 2025b; Kaiser Family Foundation, 2024). Collectively, these converging pressures undermine access to preventive, acute, mental health, and long-term care services, creating a critical regional challenge that affects community resilience and economic stability.

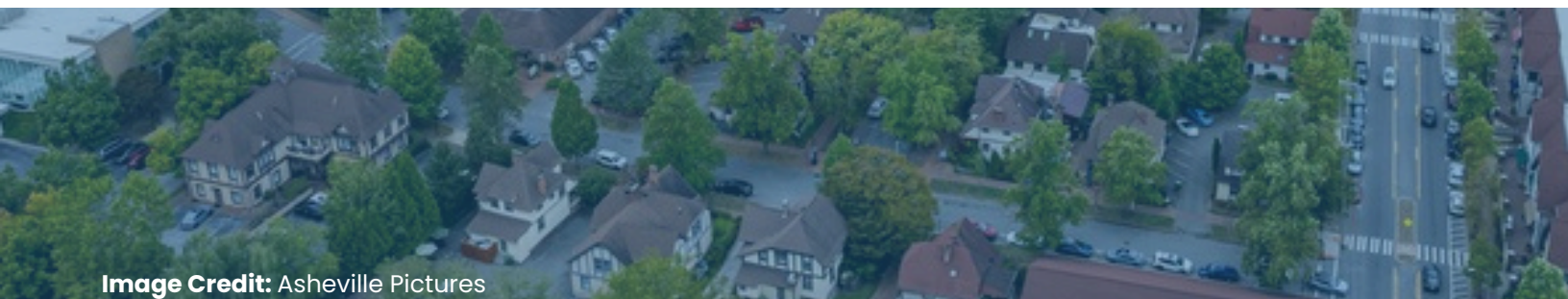


Image Credit: Asheville Pictures

03 Opportunities

Increase Workforce Ecosystem

The Land of Sky Region has a significant opportunity to strengthen its workforce ecosystem by deepening industry–education partnerships and reducing barriers that limit labor force participation. The State of Our Workforce: Western North Carolina report identifies the need to expand clear pathways for apprenticeships, work-based learning, and on-the-job training across K–12 systems, community colleges, and regional employers (myFutureNC, 2022). Enhancing these opportunities for students, dislocated workers, and under-represented or under-employed populations would increase workforce participation and better align regional skills with the needs of target sectors such as advanced manufacturing, healthcare, technology, and the outdoor and creative products industries (MAWDB, 2024).

Expanding access to enabling infrastructure including high-speed broadband, attainable workforce housing, reliable childcare, and robust multimodal transportation—remains essential to supporting workforce stability and employer competitiveness (Buncombe Partnership for Children, 2024; NCBTC, 2025). These structural constraints limit the ability of employers to recruit and retain workers and reduce the region’s overall labor force availability. By coordinating workforce strategies at the regional, rather than county-by-county level, the Land of Sky Region can strengthen employer collaboration, expand sector-based pathways, increase labor force participation, and support long-term economic resilience. Strengthening the workforce ecosystem in these ways will improve household stability, enhance talent retention, and position the region for sustained economic competitiveness.

Rebuilding Resilient Infrastructure



Image Credit: National Park Service.

According to the NC OSBM’s Hurricane Helene Recovery Report from December 2024, Tropical Storm Helene exposed major vulnerabilities in WNC’s infrastructure and housing systems, creating a critical five-year window to rebuild stronger, safer, and more resilient communities.

Regional priorities include hardening and redesigning key transportation corridors to prevent community isolation, building redundancies into broadband and utility networks

through microgrids and backup power, stabilizing water, sewer, and dam infrastructure to reduce downstream risk, and restoring natural system such as wetlands, riparian buffers, and stream channels to lessen flood impacts and protect both outdoor and economic assets.

At the same time, the region must repair, replace, and expand resilient housing, prioritizing low- and moderate-income households, elevating or relocating homes out of high-risk areas, and adopting mitigation-focused building standards that reduce future loss. County-specific priorities vary by geography: Buncombe County is encouraged to focus on resilient high-volume corridors, communications continuity, and large-scale housing recovery; Henderson County on water system reliability, dam safety, and infill housing near job centers; Madison County on slope stabilization and all-weather access to rural homes; and Transylvania County on watershed-based mitigation along tourism and residential corridors. Implementing these strategies offers an opportunity to reduce long-term recovery costs, protect residents, accelerate workforce and housing stability, and ensure communities remain accessible and functional during future extreme weather events.

According to the FBRMPO Elevate 2050 strategic plan, Tropical Storm Helene damaged thousands of transportation assets across WNC. State analyses documents that more than 6,900 damaged public road and bridge sites statewide and over 7,000 private roads, bridges, and culverts across affected counties, with the most severe impacts in the mountain region. County-specific damaged asset totals for Buncombe, Henderson, Madison, and Transylvania have not yet been compiled, but will also include damage to area watersheds, riverways, and water and sewer treatment facilities.

As our region continues to grow at a rapid pace, much of our infrastructure, including electrical systems, remains outdated and vulnerable to major storms. Broadband availability and adoption are also limited in many areas due to topography, zoning, and rural development patterns. The Institute for Emerging Issues' Digital Opportunity Report reports that Tropical Storm Helene took 707 cell towers offline in North Carolina, destroyed 1,700 miles (about twice the distance from Florida to New York City) of fiber and caused over \$100 million in telecommunications damage. Strengthening resilience will require redundant and adaptive infrastructure, incorporating microgrids, secondary road networks, water and sewer contingencies, communications networks, security networks, and other targeted mitigation solutions.

Support Business Expansion

Over the next five years, Buncombe, Henderson, Madison, and Transylvania counties are positioned to support significant business expansion by aligning workforce development with employer needs and strengthening the region's capacity for site readiness, business recruitment, and market growth. (MAWDB, 2024). Employers across WNC anticipate continued expansion, with 68% projecting growth. Regional employers reported a need to make between 22,150- 44,140 new hires over the next three years, particularly in healthcare, manufacturing, and professional services (NCDOC, 2024). There is a need to support industrial site identification, shovel-ready site preparation, and the redevelopment of underutilized commercial assets to meet the needs of expanding firms, as well as the need for workforce supports such as accessible housing options, education and industry partnerships, apprenticeships, and on the job training for target sectors (Asheville Area Chamber of Commerce, 2025).

The region's connection to the FTZ301 offers companies a pathway to expand into global markets, reduce operating costs, and increase competitiveness, particularly in export-oriented sectors. MAWDB highlights the importance of coordinated business outreach and employer services as critical to retaining firms, preventing layoffs, and maintaining a skilled workforce pipeline. Together, these strategies create a clear five-year opportunity to expand the region's economy through site development, FTZ301-supported market growth, workforce alignment, and integrated business support.



Image Credit: Rachael McIntosh.

Agriculture and Food Systems

Between 2022–2023, Buncombe, Henderson, and Transylvania counties reported an increase in those experiencing food insecurity, while Madison County reported a 0.5% decrease in those experiencing food insecurity. (Feeding America, 2023). WNC's food system is a foundational pillar of rural economic opportunity, cultural identity, and regional resilience. The region is home to thousands of small, diversified farms, most earning \$10,000 or less annually that produce high-value specialty crops, livestock, herbs, fruits, and value-added foods suited to the area's unique microclimates. These farms anchor a vibrant local food economy supported by strong direct-to-consumer sales and a growing network of processors, grocers, breweries, wineries, and farm-adjacent culinary tourism businesses that depend on local ingredients. The food system is also closely tied to the tourism sector; Asheville alone attracts millions of visitors each year whose interest in locally produced artisan foods fuels demand across regional markets. Organizations such as Appalachian Sustainable Agriculture Project (ASAP), NC Cooperative Extension, Center for Environmental Farming Systems, and WNC Communities play an essential role in strengthening farm viability by providing technical support, research, and market



Image Credit: Asheville Pictures

programs that expand regional food chains. Although WNC produces a small share of the state's overall agricultural output, it contains a disproportionately large share of North Carolina's farms and farmland, making it a critical hub for food insecurity solutions, small-scale production, land stewardship, market expansion via production and farm to table initiatives, and statewide food system resilience (ARC, 2023; Feeding America, 2023).

04 Threats

Changing Funding and Policy Landscape

The next five years present significant risks for the Land of Sky Region as federal and state funding conditions shift across recovery, infrastructure, workforce, health, and aging services. Helene recovery funds tied to FEMA Public Assistance and Hazard Mitigation programs require sustained state match commitments and strict compliance with evolving federal regulations (FEMA, 2024b; NC OSBM, 2024b), while the 2026 ARPA spending deadline threatens continuity for broadband, water, workforce, and housing projects if construction or documentation falls behind (USDOT, 2025). Simultaneously, ongoing uncertainty surrounding the Workforce Innovation and Opportunity Act reauthorization and continued shortfalls in childcare stabilization funding jeopardize local workforce pipelines and labor-force participation, especially for lower-income families (MAWDB, 2024; NC Child, 2024b).

Federal health policy debates introduce additional instability. Proposed Medicaid reductions and cuts to Older Americans Act programs could shift significant costs to states and counties, reduce access to home- and community-based services, and strain rural aging-services networks—particularly in Madison and Transylvania counties, which already have limited long-term care capacity (Center for American Progress, 2024; NCDHHS, 2023).

Rural broadband deployment also faces timing and regulatory challenges, with broadband access program delays, utility make-ready requirements, and complex permitting processes threatening last-mile progress (NTIA, n.d.; Institute for Emerging Issues, 2024). Collectively, these dynamics create a volatile and rapidly changing funding landscape. To maintain stability across infrastructure, care, workforce, and recovery systems, the region will need to aggressively secure state and federal matches, expand their cash stack, prepare for ARPA and Medicaid cliffs, protect aging-services capacity, and coordinate strategically at the regional level rather than county by county. Continuing to maintain and execute best practices services for the community will be paramount to ensure competitiveness.

Increased Cost of Living



Home prices in Buncombe County increased by more than 50% over the past five years.

(Bowen National Research, 2025).

Image Credit: Asheville Pictures.

The Land of Sky Region faces escalating cost-of-living pressures that threaten household stability, workforce participation, and the region's long-term economic competitiveness. Housing costs have risen sharply, with home prices in Buncombe County increasing by more than 50% over the past five years—far outpacing local wage growth and contributing to rising displacement and cost burdens (Bowen National Research, 2025). Living-wage requirements now exceed \$23 per hour for many households in the region, creating affordability challenges for working families and increasing pressure on employers struggling to hire and retain staff while minimum wage at the state level stays at \$7.25 per hour, with some hospitality workers earning as little as \$2.00 per hour (MIT, n.d.). Essential goods and services have grown significantly more expensive: food-at-home prices rose by more than 9% nationally in 2022, while healthcare providers report supply-chain and tariff-driven cost increases exceeding 15% (USDA ERS, 2022; AHRMM, 2024).

These rising costs intersect with the region's limited housing supply, inflation-driven increases in transportation and utility expenses, and ongoing post-Helene recovery demands on food, medical, and basic-needs services (HUD, 2023; NC OSBM, 2024b; NCDHHS, 2024; FCC, 2024). The result is increased financial stress for residents – particularly in low- and moderate-income households, caregivers, and older adults on fixed incomes. Without targeted interventions to stabilize housing costs, expand childcare and healthcare access, and increase living-wage job opportunities, the region risks declining affordability, reduced disposable income, weakened workforce stability, and diminished capacity to retain working-age families essential to long-term economic resilience.

Capacity for Economic and Environmental Recovery

The Land of Sky Region's capacity for economic and environmental recovery is increasingly limited by aging and vulnerable infrastructure, constrained local resources, and the scale of natural disasters. Tropical Storm Helene exposed deep structural capacity gaps across Buncombe, Henderson, Madison, and Transylvania counties, overwhelming emergency response systems and straining the ability of local governments, utilities, and businesses to manage prolonged disruptions. TRIP WNC Strong report documented damage to more than 6,900 public bridge sites and over 7,000 private roads, bridges, and culverts, demonstrating how a single disaster can surpass local engineering, financial, and staffing capacity (NCDOT, 2024a; NC OSBM, 2024b; TRIP, 2025). These damages cut off access to employers, health services, and supply chains, with landslides and failed corridors limiting emergency response and impeding workforce mobility (NCDOT, 2024a; TRIP, 2025).



Image Credit: Asheville Pictures.

Helene's economic impacts further revealed limited regional capacity for business and workforce recovery. According to the Asheville Chamber's Helene Business Impact Survey, 68% of employers reported operational disruptions, and over one-third experienced facility damage or prolonged closures, with small businesses disproportionately affected (Asheville Area Chamber of Commerce, n.d.). Across the region, employers reported \$52 million in estimated early losses from halted operations, supply-chain delays, and workforce displacement. Workforce systems were also strained: MAWDB and NCWorks documented significant increases in dislocated workers and jobseekers needing urgent reemployment assistance, while the NC OSBM's identified hundreds of workers temporarily or permanently displaced due to destroyed homes, inaccessible worksites, and closed childcare facilities (MAWDB, 2024; NC OSBM, 2024b).

Infrastructure systems central to economic and workforce continuity: water, sewer, broadband, and power also proved highly vulnerable. NC OSBM's revised Damage and Needs Assessment (2024) found widespread failures across water and wastewater systems, including flooded pump stations and damaged mains that slowed business reopenings and industrial recovery. Broadband outages highlighted limited redundancy, delaying telehealth, remote work, and essential communication across rural areas (Institute for Emerging Issues, 2024; NTIA, n.d.).

These capacity constraints existed even before Helene. Regional partners had already identified "infrastructure deserts" where inadequate transit, insufficient broadband, aging utilities, and limited water/sewer capacity hindered business expansion—conditions most severe in Madison and Transylvania counties (FBRMPO, 2025). Housing and land-use research shows that site constraints, slope instability, and utility gaps significantly increase construction costs and limit buildable land, reducing the region's capacity to prepare industrial sites or produce workforce housing at the scale needed to support economic competitiveness (Bowen National Research, 2025; NC OSBM, 2024). Climate-driven risks—including more frequent extreme rainfall, flooding, and erosion—further stretch local governments' financial and technical capacity (Buma, 2021; NCEM 2024; NCDOT, 2024a).

Collectively, these factors reveal a regional recovery landscape in which local governments, small businesses, and workforce systems are operating beyond existing capacity confronting high infrastructure replacement costs, workforce displacement, limited technical expertise, and uncertain funding. Without expanded state and federal investment, stronger regional coordination, and long-term resilience planning, the region will struggle to rebuild quickly, retain displaced workers, and safeguard its economic base. Strengthening recovery capacity through resilient infrastructure, redundant systems, business continuity planning, and workforce stabilization strategies is essential to maintaining economic mobility and environmental stability across the four counties.

RANKING OF REGIONAL PRIORITIES

The graph below (Figure 17) reflects values prioritized from the CEDS planning process from local leadership and community members. Community members were given 10 priorities that were informed by the past CEDS community survey with considerations and adjustments made to reflect the impact of Tropical Storm Helene. Community members were asked to rank them in importance 1 through 10. Affordable housing was consistently ranked as a top priority and is the highest ranked overall, with an average ranking of 3.4 out of 10. The other top ranked priorities were infrastructure improvements, disaster preparedness, workforce development/job training, and high-speed internet availability/access, with respective average rankings of 3.7, 3.8, 4.8, 5.4, and 5.7. Prosperity for All was the lowest ranked priority, with an average ranking of 7.6 out of 10.

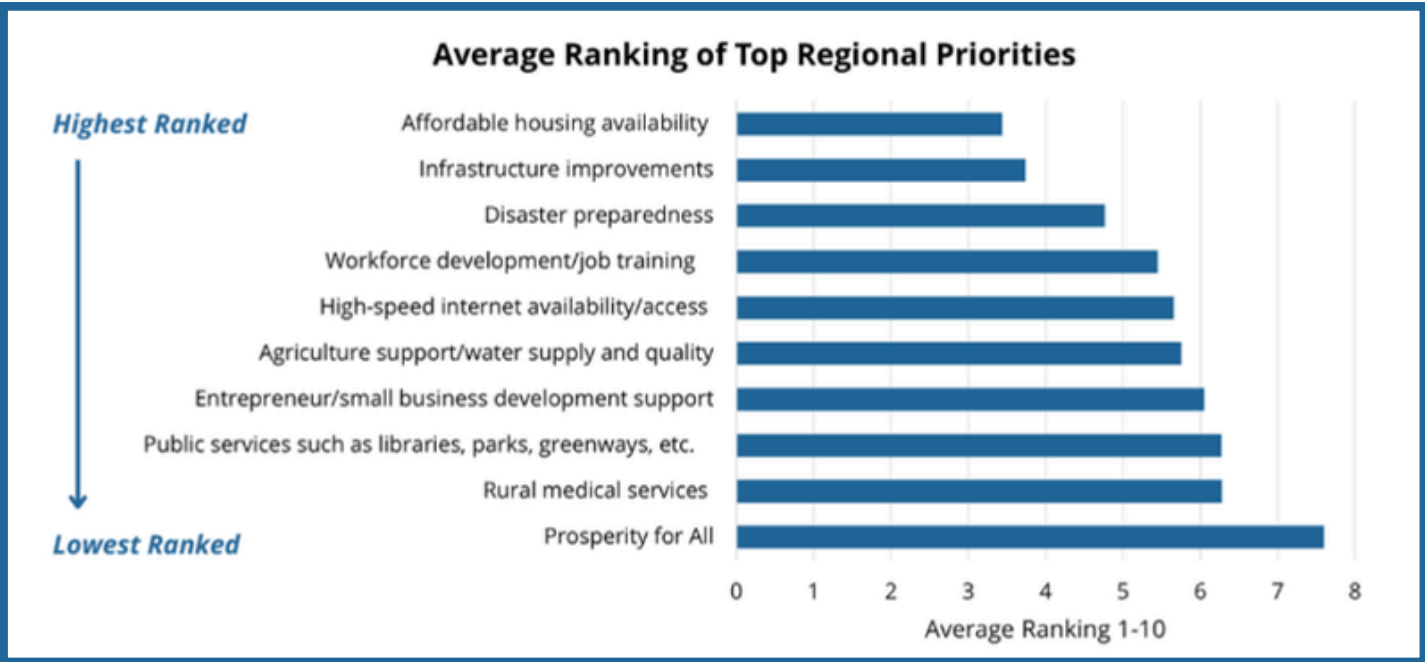


Figure 17. Regional assets identified by community survey participants in February 2025.



STRATEGIC DIRECTION AND ACTION PLAN



Image Credit: Asheville Pictures.

The Land of Sky CEDS was developed to address regional priorities and needs, while also aligning with strategies, priorities, and potential implementation partners identified in other key regional and statewide strategic and comprehensive plans. Integrating statewide strategies at the regional level helps create a stronger, more economically resilient region and state. Evaluating consistent performance metrics at local and regional levels can support a statewide analysis of economic development outcomes.

To develop our strategic direction and action plan, we reviewed past CEDS documents, other regional plans, Helene Recovery plans, notes from community meetings, and results from our SWOT Analysis. Additionally, we reviewed this with key stakeholders, held a public comment session, and conducted community surveys to ensure there was alignment. Community input and the crosswalk of key plans informed the identification of the following four goals for this CEDS:

- 01** Support the Evolution of a Dynamic Regional Economy
- 02** Health, Wellness, & Quality of Life
- 03** Opportunity & Prosperity for All
- 04** Prepared & Recovering Communities



Image Credit: Asheville Pictures.

CEDS Goals and Strategies

01

Support the Evolution of a Dynamic Regional Economy

- 1.1** Expand and modernize utility, transportation, and communications infrastructure to improve business connectivity and support emerging sectors.
- 1.2** Provide capital and technical assistance to help small businesses and entrepreneurs recover and grow after Tropical Storm Helene.
- 1.3** Increase affordable and workforce housing near employment centers aligned with local industry wages, to stabilize labor supply and encourage aging in place.
- 1.4** Strengthen partnerships between industry and education to encourage regional innovation and develop aligned career pathways and pipelines.
- 1.5** Expand training programs and apprenticeships in current and forecasted high-demand fields.
- 1.6** Support creative industries, commercial corridor revitalization, and place-based economic development tied to local assets and target industries.
- 1.7** Develop regional farm and food economy through value-added processing, distribution, and agricultural business development and support.

02

Health, Wellness, and Quality of Life

- 2.1** Increase affordable housing options that align with industry wages and include mixed-use development, housing preservation programs, and density near transportation and commercial centers.
- 2.2** Expand access to affordable dependent care, mental health services, and family support programs that strengthen workforce stability.
- 2.3** Support aging-in-place strategies and community-based multigenerational resources including growing pathways to allied health professions.
- 2.4** Promote natural, cultural, and outdoor assets as drivers of local tourism, economy, and community identity.
- 2.5** Invest in community connectivity assets such as communication systems, transportation solutions, public education, and recreation outlets to strengthen healthy and accessible communities.

Opportunity and Prosperity for All

- 3.1** Support workforce development programs that provide livable wages and career pathways in target sectors like creative and advanced manufacturing, advanced mobility, life sciences, software & IT, and professional services.
- 3.2** Grow apprenticeship and internship opportunities that connect students and residents to regional employers and opportunities.
- 3.3** Improve access to capital, research, and modernization support for small businesses and entrepreneurs in all represented communities.
- 3.4** Strengthen business and workforce opportunities in rural, disaster-impacted, and economically challenged communities.
- 3.5** Support career pathways in agriculture, life sciences, production, distribution, and value-added processing.

Prepared and Recovering Communities

- 4.1** Expand regional and county disaster preparedness, mitigation, and recovery planning capacity across all sectors.
- 4.2** Strengthen communication systems and data-sharing platforms among local governments, nonprofits, and businesses to support coordinated response and recovery operations.
- 4.3** Develop regional collaboration frameworks to leverage federal and state recovery resources.
- 4.4** Promote and support resilient land use and housing development to reduce future vulnerability.
- 4.5** Support workforce and small business recovery programs that help each of our communities rebuild quickly.
- 4.6** Assist in efforts to create redundant infrastructure including modernizing, and improving sewers, stormwater, roads, and other critical utilities.
- 4.7** Modernize regional GIS systems by establishing data governance, shared data environments, and secure, scalable platforms to support coordinated planning and disaster response.

Action Plan

01 Support the Evolution of a Dynamic Regional Economy

The Land of Sky Region is positioned to strengthen long-term economic competitiveness by modernizing critical infrastructure, expanding housing and workforce capacity, and supporting the growth of innovative, place-based industries. Coordinated investments in broadband, water and sewer systems, and multimodal transportation will expand business connectivity, improve site readiness, and reduce vulnerabilities exposed during Tropical Storm Helene (NC OSBM, 2024b; NTIA, n.d.; TRIP, 2025). Strengthening small businesses and fostering entrepreneurship, particularly in communities most affected by Helene, will be essential to stabilizing the region's economic base and supporting long-term recovery (Asheville Area Chamber of Commerce, n.d.; Mountain BizWorks, 2023).

Expanding and preserving affordable workforce housing units near employment centers remains critical to ensuring a stable labor supply and supporting aging in place. With regional vacancy rates below 3% and median home prices far outpacing local wages, increasing attainable units aligned with industry earnings will help retain workers, reduce commute burdens, and strengthen employer competitiveness (Bowen National Research, 2025).

Deepening partnerships between industry and education, including K–12 districts, community colleges, universities, and local employers, will broaden career pathways in advanced manufacturing, healthcare, information technology, and other growing fields (MAWDB, 2024; P20 Council, 2025). Expanding apprenticeships, dual-enrollment opportunities, and employer-led upskilling programs will further support talent retention and increase access to quality jobs (NC Community College System, 2024; myFutureNC and Partners, 2022).

Strengthening commercial corridors will reinforce the region's identity, stimulate cultural tourism, and promote place-based business development. With more than 17,500 creative-sector jobs and over \$1 billion in annual economic impact, the creative economy remains a nationally recognized driver of innovation and entrepreneurship (ArtsAVL, 2024; NCDNCR, 2023). Likewise, growing the regional farm and food economy through value-added processing, distribution capacity, and agricultural business development will enhance rural entrepreneurship and strengthen local food system resilience and agritourism (ARC, 2022).

Together, these strategies position the Land of Sky Region to cultivate homegrown talent, accelerate innovation, and support accessible economic growth. By coordinating infrastructure investments, expanding business and entrepreneurship support, producing attainable workforce housing, and aligning education and training systems with employer needs, the region can strengthen resilience, foster recovery, and advance a dynamic and competitive economy for Buncombe, Henderson, Madison, and Transylvania counties.

Goal 1 Strategies

1.1

Expand and modernize utility, transportation, and communications infrastructure to improve business connectivity and support emerging sectors.

1.2

Provide capital and technical assistance to help small businesses and entrepreneurs recover and grow after Tropical Storm Helene.

1.3

Increase affordable and workforce housing near employment centers aligned with local industry wages, to stabilize labor supply and encourage aging in place.

1.4

Strengthen partnerships between industry and education to encourage regional innovation and develop aligned career pathways and pipelines.

1.5

Expand training programs and apprenticeships in current and forecasted high-demand fields.

1.6

Support creative industries, commercial corridor revitalization, and place-based economic development tied to local assets and target industries.

1.7

Develop regional farm and food economy through value-added processing, distribution, and agricultural business development and support.

Potential Implementation Partners

LOSRC, FBRMPO, LOSRPO, Brevard College, Cooperative Extension, ASAP, counties and municipalities, local planning departments, Asheville-Buncombe County Economic Development Coalition, Henderson County Partnership for Economic Development, Madison County EDC, Transylvania Economic Alliance, Mountain BizWorks, CarolinaWest, Outdoor Business Alliance, NCDOT, NC Department of Information Technology (Broadband Office), Duke Energy, French Broad Electronic Membership Corporation (EMC), Renew NC, private broadband providers, Metropolitan Sewage District (MSD) and local water/sewer authorities, Asheville Regional Airport Authority, ARC, EDA, USDA Rural Development, NC Department of Commerce, U.S. Department of Housing and Urban Development (HUD), WNC Communities

02 Health, Wellness, & Quality of Life

The Land of Sky Region recognizes that housing stability, community connectivity, and health are fundamental to overall quality of life. Strengthening these foundations enhances resilience, supports family stability, and ensures that residents of all ages can participate fully in community life. Improving access to safe, attainable, and well-located housing is central to this goal. Increasing affordable and accessible housing through mixed-use development, infill, and preservation reduces cost burdens, supports aging in place, and improves proximity to essential services such as healthcare, childcare, and transit (Bowen National Research, 2025; LOSRC AAA, 2023). Housing connected to transportation and commercial areas helps residents maintain independence, lower transportation costs, and access the essential services for long-term well-being (Elevate 2050, 2025).

Expanding access to affordable dependent care, mental health services, and family support is equally critical to community wellness. Childcare shortages, high costs, and long waitlists restrict workforce participation and place significant strain on households. Additionally, gaps in behavioral health services affect school readiness, family stability, and community safety (Buncombe Partnership for Children, 2024). Improving access to childcare, mental health providers, and family-centered services strengthens wellness across the lifespan—from early childhood to older adulthood (Kaiser Family Foundation, 2024).



Image Credit: Bill Downy.

A skilled and adequately staffed health and wellness workforce is also essential to meeting regional needs. Employers throughout the region continue to face shortages in nursing, behavioral health, and allied health professions (MAWDB, 2024; myFutureNC, 2025). Community colleges and universities, including A-B Tech, Blue Ridge Community College, Mars Hill University, and UNCA, are expanding credential programs and clinical pathways that support residents pursuing careers in high-demand health and human services fields (Blue Ridge Community College, 2024; UNCA, 2023). As the region continues to age, expanding aging-in-place strategies including home repair programs, caregiver supports, accessible housing design, neighborhood-based services, and multigenerational resources will help older adults remain safely in their homes and maintain a sense of belonging and independence (NCDHHS, 2023; National Council on Aging, 2025).

The region's natural, cultural, and outdoor assets also play an essential role in physical and mental well-being, serving as daily touchpoints for recreation, social connection, and community identity. Parks, greenways, trails, waterways, cultural institutions, and public gathering spaces support healthy lifestyles and reinforce the region's sense of place (City of Brevard, n.d.; FBRMPO, 2025; NCDNCR, 2023).

Investments in transportation, broadband, communication networks, and recreational infrastructure help reduce isolation, improve access to services, and strengthen overall community connectivity (FBRMPO, 2025; NCDOT, 2024a; NCDOT, 2024b, Institute for Emerging Issues, 2024; NTIA, n.d.).

By coordinating investments in housing stability, care systems, aging supports, recreation, and community infrastructure, the Land of Sky Region can build healthier, more resilient communities where everyone can thrive. These investments ensure that residents across Buncombe, Henderson, Madison, and Transylvania counties have access to the environments, services, and support needed to thrive throughout all stages of life.

Goal 2 Strategies

2.1

Increase affordable housing options that align with industry wages and include mixed-use development, housing preservation programs, and density near transportation and commercial centers.

2.2

Expand access to affordable dependent care, mental health services, and family support programs that strengthen workforce stability.

2.3

Support aging-in-place strategies and community-based multigenerational resources including growing pathways to allied health professions.

2.4

Promote natural, cultural, and outdoor assets as drivers of local tourism, economy, and community identity.

2.5

Invest in community connectivity assets such as communication systems, transportation solutions, public education, and recreation outlets to strengthen healthy and accessible communities.

Potential Implementation Partners

NCDHHS, Dogwood Health Trust, Pisgah Health Foundation, Vaya Health, MAHEC, Mission Health, Pardee UNC Health Care, local health departments, Buncombe Partnership for Children, Southwestern Child Development, Smart Start network, YMCA and Boys & Girls Club affiliates, Councils on Aging and Area Agency on Aging (LOSRC), Habitat for Humanity, Mountain Housing Opportunities, RenewNC, Housing Assistance Corporation, municipal parks and recreation departments, Conserving Carolina, school districts, A-B Tech, Blue Ridge Community College, UNC Asheville, Mars Hill University, Brevard College, Warren Wilson College, NCWorks, Mountain Area Workforce Development Board (MAWDB), local DSS agencies, State Parks, US Forest Service.

03 Opportunity and Prosperity for All

The Land of Sky Region is committed to expanding economic mobility by connecting residents to livable-wage employment and strengthening career pathways in high-growth sectors, including advanced manufacturing, creative industries, life sciences, software and IT, advanced mobility, and professional services (Asheville Area Chamber of Commerce, 2025; Data USA, 2023). Workforce development efforts that align education, training, and employer needs including apprenticeships, internships, and other work-based learning models are essential to deepening the regional talent pipeline and preparing residents for secure careers (MAWDB, 2024; myFutureNC, 2025).

Small businesses remain central to regional prosperity. Expanding access to capital, technical assistance, research, and modernization enables entrepreneurs to adopt new technologies, recover from economic shocks, innovate, and scale their operations (Mountain BizWorks, 2025; Riverbird Research, 2025). Strengthening business and workforce opportunities in rural and disaster-impacted communities is critical to ensuring recovery and long-term resilience in all communities, particularly following the disruptions caused by Tropical Storm Helene (Asheville Area Chamber of Commerce, n.d.; NC OSBM, 2024b).

Agriculture and local food production provide additional opportunities for workforce and business development. Supporting career pathways in production, distribution, life sciences, and value-added processing strengthens rural entrepreneurship and continues to create economic opportunities (ARC, 2022).

Strategies outlined in Goal 2, such as expanded access to childcare, transportation, and support for older workers, will expand labor-force participation and strengthen workforce development efforts to support residents entering and remaining in the workforce (Buncombe Partnership for Children, 2024; U.S. Chamber of Commerce Foundation, 2024; NCDHHS, 2023). Together, these strategies advance economic mobility, strengthen entrepreneurship, and cultivate a competitive, and evolving regional economy where prosperity is shared across Buncombe, Henderson, Madison, and Transylvania counties.



Image Credit: Asheville Pictures.

Goal 3 Strategies

3.1

Support workforce development programs that provide livable wages and career pathways in target sectors like creative and advanced manufacturing, advanced mobility, life sciences, software and IT, and professional services.

3.2

Grow apprenticeship and internship opportunities that connect students and residents to regional employers and opportunities.

3.3

Improve access to capital, research, and modernization support for small businesses and entrepreneurs in all represented communities.

3.4

Strengthen business and workforce opportunities in rural, disaster-impacted, and economically challenged communities.

3.5

Support career pathways in agriculture, life sciences, production, distribution, and value-added processing.

Potential Implementation Partners

MAWDB, NCWorks, local K–12 school districts, A–B Tech, Blue Ridge Community College, Universities and Colleges, ApprenticeshipNC, regional employers (Pratt and Whitney, GE Aviation supply chain firms, Blue Ridge Metals, Linamar, local outdoor gear and creative manufacturers), Renew NC, Asheville Area Chamber of Commerce, Hatch Innovation Hub, Small Business and Technology Development Center (SBTDC), Mountain BizWorks, Small Business Administration (SBA), CDFIs and local banks, Explore Asheville, Transylvania Tourism Development Authority, Center for Craft, ArtsAVL, Brevard Music Center, Conserving Carolina, SAHC, tourism and downtown associations, EDA, USDOL.

04 Prepared & Recovering Communities

The Land of Sky Region seeks to strengthen its capacity to withstand, respond to, and recover from future disasters through coordinated planning, resilient development, and improved collaboration across agencies and jurisdictions. Tropical Storm Helene exposed vulnerabilities in infrastructure, housing, utilities, and communication systems, highlighting the urgent need for unified regional preparedness and long-term resilience planning (FEMA, 2025b; NC OSBM, 2024b; TRIP, 2025). Expanding disaster planning and mitigation capacity at both county and regional levels will ensure that emergency response and recovery efforts are swift, consistent, and well-coordinated across all sectors (NCDEM, 2024; NCDOT, 2024).

Strengthening communication networks and modernizing data-sharing systems will further support faster and more informed decision-making during and following crisis events (Institute for Emerging Issues, 2024; NTIA, 2023–2024). Developing regional collaboration frameworks allows communities to leverage federal and state recovery resources more effectively, ensuring a coordinated approach across jurisdictions.



Promoting and supporting resilient land use, housing development, and critical infrastructure including microgrids, sewers, stormwater, and roadway systems help reduce vulnerability to future disasters and enhance community stability. Investments in modernized utilities improve reliability and the ability of communities to maintain essential services during and after disruptive events like Tropical Storm Helene. Supporting small-business and workforce recovery programs further helps maintain economic continuity, particularly as many businesses reported significant operational losses and workforce disruptions after Helene (Asheville Area Chamber of Commerce, n.d.; Riverbird Research, 2025).

A key component of this work is scaling and modernizing LOSRC's Geographic Information Systems (GIS) and establishing consistent data governance practices to reliably support evolving regional planning, project management, and interagency disaster-response needs. Transitioning to enterprise licensing and shared GIS environments provides the foundational infrastructure needed to meet growing data and mapping demands related to resilience (NC CGIA, 2024; USGS, 2024). Clear governance standards and secure, centralized platforms with scalable storage and georedundant backups will enable LOSRC to more effectively produce, use, and share location-based information, maps, analyses, and tools for routine planning, special projects, and emergency situations.

Strengthening coordination frameworks will help interagency partners work more effectively across jurisdictions. Standardized workflows, clearly defined roles, multi-jurisdiction training, and pre-established protocols will support efficient emergency response and recovery (NCDOT, 2024; NC OSBM, 2024b).

Goal 4 Strategies

4.1

Expand regional and county disaster preparedness, mitigation, and recovery planning capacity across all sectors.

4.2

Strengthen communication systems and data-sharing platforms among local governments, nonprofits, and businesses to support coordinated response and recovery operations.

4.3

Develop regional collaboration frameworks to leverage federal and state recovery resources.

4.4

Promote and support resilient land use and housing development to reduce future vulnerability.

4.5

Support workforce and small business recovery programs that help each of our communities rebuild quickly.

4.6

Assist in efforts to create redundant infrastructure including modernizing, and improving sewers, stormwater, roads, and other critical utilities.

4.7

Modernize regional GIS systems by establishing data governance, shared data environments, and secure, scalable platforms to support coordinated planning and disaster response.

Potential Implementation Partners

LOSRC, LOSRC member governments, WestNGN, FBRMPO and LOSRPO, Footprint Project, Epsilon, Esri, NC Collaboratory, NOAA, National Environmental Mapping and Applications Center, Chambers of Commerce, Working Group for Enhanced Emergency Response, North Carolina Geographic Information Coordinating Council, NC Local Government Commission, USFS, North Carolina Department of Information Technology, Fernleaf, Mountain Regional GIS Information Alliance (MRGAC), County Emergency Management Departments, NC Emergency Management, FEMA, American Red Cross, municipal and county GIS departments, NC CGIA, NC Emergency Management GIS, utility providers (Duke Energy, French Broad EMC, MSD, local water/sewer authorities), NCDOT, U.S. Army Corps of Engineers, HUD (Community Development Block Grant-Disaster Relief (CDBG-DR)), NC OSBM, Mountain BizWorks, SBTDC, SBA Disaster Assistance, Asheville Chamber, MAWDB, NCWorks, long-term recovery groups, ARC, USDA Rural Development, WGEER, NC Geographic Information Coordinating Council, NEMAC

Evaluation Framework

Evaluation of each strategy will be ongoing, and progress will be reported through annual updates to this document. Our Implementation timelines are defined as: Short (1-3 years), Mid (3-5 years), Long (5+ years)

Goal 1: Support the Evolution of a Dynamic Regional Economy	Timeframe	In Process	Achieved
1.1 Expand and modernize utility, transportation, and communications infrastructure to improve business connectivity and support emerging sectors.	Long	X	
1.2 Provide capital and technical assistance to help small businesses and entrepreneurs recover and grow after Tropical Storm Helene.	Mid	X	
1.3 Increase affordable and workforce housing near employment centers aligned with local industry wages, to stabilize labor supply and encourage aging in place.	Long	X	
1.4 Strengthen partnerships between industry and education to encourage regional innovation and develop aligned career pathways and pipelines.	Long	X	
1.5 Expand training programs and apprenticeships in current and forecasted high-demand fields.	Short	X	
1.6 Support creative industries, commercial corridor revitalization, and place-based economic development tied to local assets and target industries.	Short	X	
1.7 Develop regional farm and food economy through value-added processing, distribution, and agricultural business development and support.	Long	X	

Goal 2: Health, Wellness, and Quality of Life	Timeframe	In Process	Achieved
2.1 Increase affordable housing options that align with industry wages and include mixed-use development, housing preservation programs, and density near transportation and commercial centers.	Long	X	
2.2 Expand access to affordable dependent care, mental health services, and family support programs that strengthen workforce stability.	Long	X	
2.3 Support aging-in-place strategies and community-based multigenerational resources including growing pathways to allied health professions.	Mid	X	
2.4 Promote natural, cultural, and outdoor assets as drivers of local tourism, economy, and community identity.	Short	X	
2.5 Invest in community connectivity assets such as communication systems, transportation solutions, public education, and recreation outlets to strengthen healthy and accessible communities	Short	X	

Goal 3: Opportunity and Prosperity for All	Timeframe	In Process	Achieved
3.1 Support workforce development programs that provide livable wages and career pathways in target sectors such as creative and advanced manufacturing, advanced mobility, life sciences, software and IT, and professional services.	Mid	X	
3.2 Grow apprenticeship and internship opportunities that connect students and residents to regional employers and opportunities.	Mid	X	
3.3 Improve access to capital, research, and modernization support for small businesses and entrepreneurs in all represented communities.	Long	X	
3.4 Strengthen business and workforce opportunities in rural, disaster-impacted, and economically challenged communities.	Long	X	
3.5 Support career pathways in agriculture, life sciences, production, distribution, and value-added processing.	Long	X	

Goal 4: Prepared and Recovering Communities	Timeframe	In Process	Achieved
4.1 Expand regional and county disaster preparedness, mitigation, and recovery planning capacity across all sectors.	Short	X	
4.2 Strengthen communication systems and data-sharing platforms among local governments, nonprofits, and businesses to support coordinated response and recovery operations.	Mid	X	
4.3 Develop regional collaboration frameworks to leverage federal and state recovery resources.	Long	X	
4.4 Promote and support resilient land use and housing development to reduce future vulnerability.	Short	X	
4.5 Support workforce and small business recovery programs that help each of our communities rebuild quickly.	Long	X	
4.6 Assist in efforts to create redundant infrastructure including modernizing, and improving sewers, stormwater, roads, and other critical utilities.	Short	X	
4.7 Modernize regional GIS systems by establishing data governance, shared data environments, and secure, scalable platforms to support coordinated planning and disaster response.	Long	X	

ECONOMIC RESILIENCE

The Land of Sky Region’s long-term prosperity depends on its ability to anticipate disruption, withstand shocks, and adapt quickly. Economic resilience in Buncombe, Henderson, Madison, and Transylvania counties extends beyond emergency response, it involves strengthening the systems that sustain a competitive business climate, an adaptive workforce, diverse industries, and thriving communities. By investing in resilient infrastructure, stable housing systems, broadband reliability, shared data, and a flexible talent pipeline, the region can safeguard its economic drivers while expanding opportunity, improving quality of life, and positioning itself as one of the most dynamic and forward-looking regional economies in the Southeast.



STEADY-STATE RESILIENCE



RESPONSIVE RESILIENCE



FORWARD-LOOKING RESILIENCE STRATEGY

Steady-State Resilience

The foundation of the region’s resilience lies in its people, employers, assets, and infrastructure. The Land of Sky Region benefits from a strong and expanding talent pipeline supported by local school systems, community colleges, allied health programs, universities, and public-sector partnerships that align education and training with regional industry needs. Target sectors identified in the region such as advanced manufacturing, outdoor recreation, creative industries, life sciences, and professional services are creating a more diverse economic base and reducing dependence on any single industry.

However, rapid population growth and shifting demographics are increasing pressure on infrastructure, housing systems, and social services. Housing affordability challenges and a shortage of workforce-accessible units constrain labor force participation and weaken household resilience. Broadband gaps and digital barriers especially in rural and mountainous areas—continue to limit access to education, telehealth, remote work, and business competitiveness. Meanwhile, land use and transportation networks must evolve with long-range regional mobility planning to prevent congestion, economic inefficiency, and unevenly distributed access to jobs and services. By addressing these challenges through proactive planning, targeted infrastructure investments, workforce innovation, and housing development near employment centers, the region can enhance both its economic competitiveness and its capacity to adapt to future change.

Responsive Resilience

The impact of Tropical Storm Helene exposed vulnerabilities across housing, transportation, broadband, and essential infrastructure. Damage to roads, bridges, utilities, and communications systems disrupted supply chains, displaced residents, and strained local governments and businesses. The storm revealed how infrastructure that lacks redundancy, when one road, fiber line, or water system fails, can trigger widespread economic disruption. Building responsive resilience requires faster recovery capacity, stronger cross-jurisdiction coordination, and continuity planning for both public agencies and private employers. Communities need shared data, interoperable GIS systems, and reliable communication networks to support real-time decision-making during emergencies. Responsive resilience also depends on stabilizing housing to prevent long-term displacement, supporting businesses in continuity planning, and protecting critical employers that anchor the regional economy. By strengthening recovery systems and adding redundancy to infrastructure and data systems, the region can shorten downtime, protect residents and businesses, and maintain economic momentum after future disruptions.



Image Credit: Bill Downey.

Forward Looking Resilience Strategy

The region strengthens long-term resilience by strategically aligning infrastructure, workforce, housing, and economic development. Key actions include: increasing broadband reliability and redundancy to support business continuity, remote work, GIS modernization, and emergency response; expanding diverse, affordable housing near job centers and transit corridors to stabilize the workforce; modernizing roads, bridges, water, sewer, stormwater, and energy systems to reduce single-points-of-failure; and building an adaptive workforce through apprenticeships, upskilling, and employer partnerships. Supporting small business continuity and supply-chain resilience will help firms withstand future disruptions and remain competitive. Finally, diversifying industry clusters—including outdoor recreation, the creative economy, and advanced manufacturing—will build a more balanced economy less exposed to single event disruptions. These strategies will protect economic drivers, maintain growth during shocks, and expand opportunities for all residents.

CONCLUSION

The Land of Sky Region stands at a pivotal moment. By applying the lessons learned from recent disruptions and investing in proactive, future-focused strategies, the region can foster an economy that is more innovative, welcoming, and resilient than ever before. Resilience is economic development; it reduces risk, attracts investment, strengthens communities, and enhances long-term competitiveness. Through coordinated action across jurisdictions and sectors, the Land of Sky Region can secure a stronger, more prosperous future for all.

CEDS STEERING COMMITTEE

- Chad Ayers – CTE Director, Madison County Schools
- Deborah Bailey – Vice President of Economic and Workforce Development, A-B Tech
- DeWayne Barton – Founder and CEO, Hood Huggers
- Terry Bellamy – Former Mayor of Asheville and Community Advocate
- Sherri Davis – Director, A-B Tech Madison
- Jenny Disson – Corporate Engagement and Strategic Partnerships, NC Institute for Climate Studies
- Clark Duncan – Executive Director, Economic Development Coalition for Asheville and Buncombe County
- April Riddle – Existing Industry Expansion Manager, Economic Development Partnership of North Carolina
- Patrick Fitzsimmons – Mayor, Weaverville
- Norris Gentry – Madison County Chamber of Commerce
- Larry B. Harris – Mayor, Black Mountain
- Mike Hawkins – Owner, Pisgah Fish Camp
- Burton Hodges – Executive Director, Transylvania Economic Alliance
- Dr. Lisa Mann – Director, Career Center, UNC Asheville
- Emily Martin – Senior Director of Business and Economic Development, Henderson County Partnership for Economic Development
- E.B. Odderstol – Economic Development Program Analyst, Buncombe County
- Dr. Tracy Parkinson – Executive Vice President and Provost, Mars Hill University
- Deborah Porto – Broadband Specialist
- Dr. Scott Queen – Former Vice President of Economic and Workforce Development, Blue Ridge Community College
- Dr. Arthur Salido – Director of Economic Development, WithersRavenel
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APPENDIX

Appendix A: LOSRC Departments

Economic and Community Development	<p>To help fulfill the Council's Mission, this department conducts planning, economic, and community development services for our local governments and communities. The goal of the department is to meet the needs and desires of our region today and in the future.</p>
Client Services	<p>Client Services connects resources and programming to community members through programs such as Mountain Mobility, Non-Emergency Medicaid Transportation, The Remembrance Project, GO Places, and INspire.</p>
Area Agency on Aging	<p>AAA promotes the highest level of well-being of older adults and their families by partnering with organizations to provide a comprehensive menu of opportunities, services, and advocacy support.</p>
Mountain Area Workforce Development Board	<p>Created through federal legislation, MAWDB oversees a single, comprehensive strategic plan for the four-county area by identifying workforce development issues and the needs of local businesses.</p>

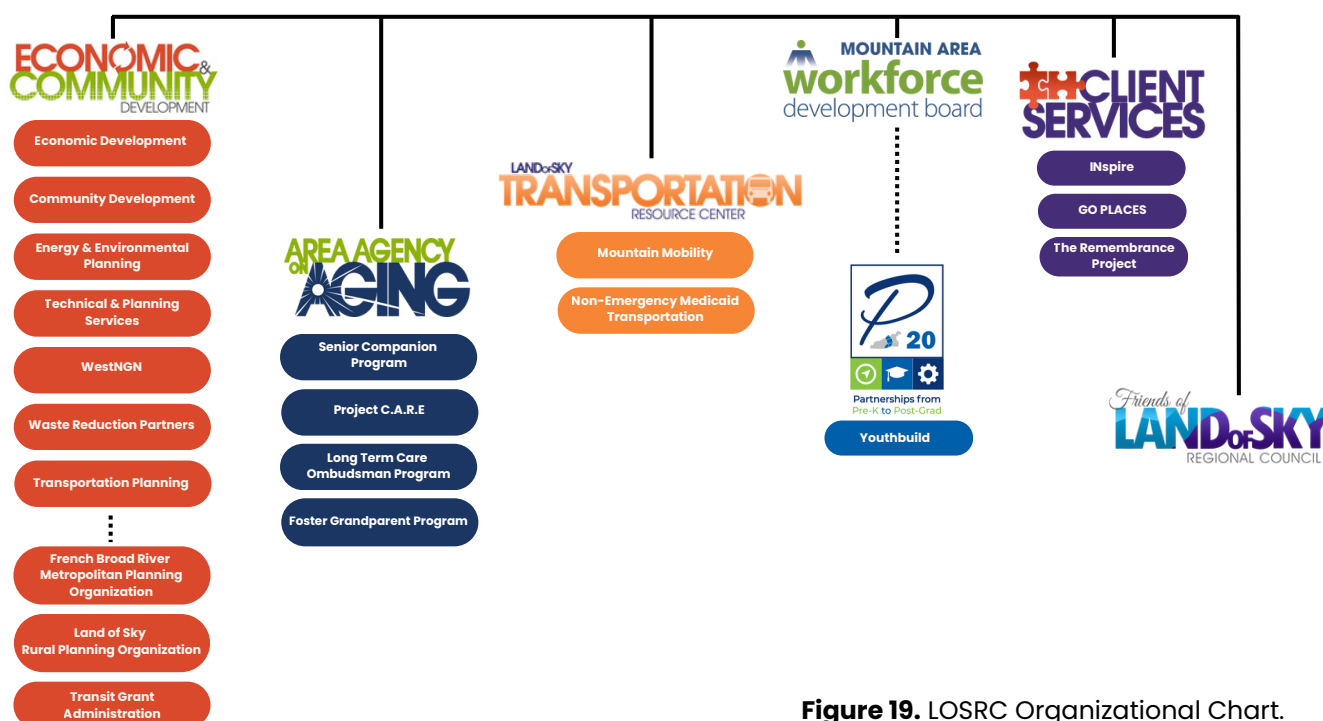


Figure 19. LOSRC Organizational Chart.

Appendix B: Regional Profile Sources

Footnote	Citation	Notes
1	U.S. Census Bureau, 2023, "ACS Demographic and Housing Estimates."	<p>Age Distribution: Sum of population for 24 and under, 25 to 64, and 65+ for each county: Buncombe, Henderson, Madison, and Transylvania. Each age group estimate was divided by total regional population.</p> <p>Percent Female/Male: Sum of Sex and Age: Male/Female population for each county (Buncombe, Henderson, Madison, and Transylvania) divided by total regional population.</p> <p>Percent Minority: Sum Buncombe, Henderson, Madison, and Transylvania Not Hispanic or Latino population estimates for Black or African American alone, American Indian and Alaska Native alone, Asian alone, Native Hawaiian and Other Pacific Islander alone, Some Other Race alone, Two or More Races, divided by total Not Hispanic or Latino population sum of all four counties.</p>
2	NC OSBM, 2025, "County/State Population Projections."	Total Population: Sum of Buncombe, Henderson, Madison, and Transylvania Total 2025 Population from Sex and Single Years of Age (2020–2060) data file.
3	NC OSBM, 2024a, "County Population Growth 2040–2050."	Sum of Buncombe, Henderson, Madison, and Transylvania July 2050 Projected Populations.
4	NCDHHS, 2025, NC Aging Profiles 2023.	Projected population growth for population 65+ for Region B – LOSRC
5	National Economic Resilience Data Explorer, 2025, "County Data Explorer."	Average of Special Need Indicators: Percent Urban/Percent Rural for Buncombe, Henderson, Madison, and Transylvania.
6	NC OSBM, 2022, "Hurricane Helene in North Carolina."	Sum of Land in Farms 2022 for Buncombe, Henderson, Madison, and Transylvania counties.
7	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. p. V–25.	
8	Land of Sky Regional Council. 2025.	

9	U.S. Census Bureau, 2023, "Selected Economic Characteristics."	<p>Median Household Income: Median Household Income (dollars) for Asheville, NC Metro Area.</p> <p>Per Capita Income: Average of Per Capita Incomes from Buncombe, Henderson, Madison, and Transylvania Counties.</p>
10	MIT Living Wage Calculator, n.d., "Counties and MSAs in NC."	Average Required Annual Income Before Taxes (1 Adult, 1 Child) for Buncombe, Henderson, Madison, and Transylvania Counties.
11	Federal Reserve Bank of St. Louis, 2023, "Real GDP: All Industries."	Sum of Real GDP: All Industries 2023 (Units: Thousands of Chained 2017 U.S. Dollars, Not Seasonally Adjusted) for Buncombe, Madison, Henderson, and Transylvania.
12	U.S. Census Bureau, 2023, "Poverty Status in the Past 12 Months."	Sum of Population for whom Poverty Status is Determined – Below Poverty Level Estimate for Buncombe, Henderson, Madison and Transylvania, divided by sum of Population for which poverty status is determined for each county.
13	Feeding America, 2023, "Food Insecurity among the Overall Population in the United States."	<p>North Carolina: Food Insecurity Rate in North Carolina (2023)</p> <p>National: Food Insecurity in the United States (2023).</p>
14	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. P. VI-6-7	<p>Median Home Value: Value for Primary Study Area (PSA) including Buncombe, Henderson, Madison, and Transylvania counties.</p> <p>Median Gross Rent: Value for Primary Study Area (PSA) including Buncombe, Henderson, Madison, and Transylvania counties.</p> <p>Percent Cost Burdened and Severe Cost Burdened Households (based on median household income): Cost Burdened = paying more than 30% of income towards housing costs; Severe Cost Burdened = paying more than 50% of income towards housing costs.</p>

16	Compiled from Individual County Sources.	All higher education institutions in Buncombe, Henderson, Madison, and Transylvania.
17	MyFutureNC, 2025, "County Data and Attainment Profiles."	Percent Have Degree or Credential and percent No Degree of LOSRC's COG residents ages 25-44, 2023.
18	Data USA, 2023, "Employment by Industries."	Sum of "People in Workforce" for the top 10 Industries across Buncombe, Henderson, Madison, Transylvania counties.
19	U.S. Census Bureau, 2023, "Employment Status."	Population 20 to 64 years - Labor Force Participation Rate Estimate (Buncombe County, Henderson County, Madison County, and Transylvania County).

Appendix C: Buncombe County Profile Sources

Footnote	Citation	Notes
1	U.S. Census Bureau, 2023, "ACS Demographic and Housing Estimates."	<p>County Seat: Total population Estimate Asheville, NC Metro Area</p> <p>Age Distribution: Sum of population for 24 and under, 25 to 64, and 65+ divided by Buncombe Total population.</p> <p>Percent Female/Male: Sex and Age: Female/Male Estimate for Buncombe County divided by Total population.</p> <p>Percent Minority: Sum Not Hispanic or Latino population estimates for Black or African American alone, American Indian and Alaska Native alone, Asian alone, Native Hawaiian and Other Pacific Islander alone, Some Other Race alone, Two or More Races, divided by total Not Hispanic or Latino population for Buncombe County.</p>
2	NC OSBM, 2025, "County/State Population Projections."	Total 2025 population from Sex and Single Years of Age (2020-2060) data file.
3	NC OSBM, 2024a, "County Population Growth 2040-2050."	July 2050 Projected Population.
4	NCDHHS, 2025, North Carolina Aging Profiles 2023.	Population growth: 2043 Projection for Age 65+ for Buncombe County.

5	National Economic Resilience Data Explorer, 2025, "County Data Explorer (Buncombe County, NC)."	Special Need Indicators: Percent Urban and Percent Rural in Buncombe County.
6	NC OSBM, n.d., "Buncombe County Community Impacted by Hurricane Helene."	Agriculture: 2022 Land in Farms (Acres)
7	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. p. V-25.	
8	U.S. Census Bureau, 2023, "Selected Economic Characteristics."	Median Household Income: Estimate in dollars Per Capita Income: Estimate in dollars
9	MIT Living Wage Calculator, 2025, "Living Wage Calculation for Buncombe County, North Carolina."	Required Annual Income Before Taxes (1 Adult, 1 Child)
10	Federal Reserve Bank of St. Louis, 2023, "Real GDP: All Industries in Buncombe County, NC."	Real Gross Domestic Product: All Industries in Buncombe County, NC (2023) (Units: Thousands of Chained 2017 U.S. Dollars, Not Seasonally Adjusted)
11	U.S. Census Bureau, 2023, "Poverty Status in the Past 12 Months."	Population for whom Poverty Status is Determined: Below Poverty Level Estimate
12	NCDOR, 2023, "County Property Taxes and Reappraisal Schedules, FY 2023–2024."	Buncombe Tax Rate (Year of latest reappraisal: 2021) (All rates per \$100 valuation)
13	Feeding America, 2023, "Food Insecurity among the Overall Population in Buncombe County."	North Carolina: Food Insecurity Rate in North Carolina (2023) Buncombe County: Food Insecurity Rate in Buncombe County (2023)
14	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. P. VI-6–7	Cost Burdened = paying more than 30% of income towards housing costs; Severe Cost Burdened = paying more than 50% of income towards housing costs.

15	U.S. Census Bureau, 2023, "Selected Housing Characteristics."	<p>Homeowner Vacancy Rate: Housing Occupancy: Total housing units: Homeowner vacancy rate estimate Buncombe County.</p> <p>Rental Vacancy Rate: Housing Occupancy: Total housing Units: Rental vacancy rate estimate Buncombe County.</p> <p>Percent of Units with No Vehicle Available: Vehicles Available: Occupied housing units: No vehicles available estimate Buncombe County.</p> <p>Occupied Housing Units: Housing Occupancy: Total housing units: Occupied housing units estimate Buncombe County.</p> <p>Unoccupied Housing Units: Housing Occupancy: Total housing units: Vacant housing units estimate Buncombe County.</p>
16	Henderson County Chamber of Commerce. n.d. "Education."	
17	MyFutureNC, 2025, Buncombe County 2025 Attainment Profile.	Percent Have Degree or Credential and percent No Degree of Buncombe residents ages 25-44, 2023.
18	Data USA, 2023, "Buncombe County, NC: Employment by Industries."	"People in Workforce" for the top 10 Industries across Buncombe County.
19	U.S. Census Bureau, 2023, "Employment Status."	Population 16 years and over: Age: 20 to 74 years Labor Force Participation Rate Estimate

Appendix D: Henderson County Profile Sources

Footnote	Citation	Notes
1	U.S. Census Bureau, 2023, "ACS Demographic and Housing Estimates."	<p>County Seat: Total population Estimate Hendersonville, NC Metro Area</p> <p>Age Distribution: Sum of population for 24 and under, 25 to 64, and 65+ divided by Henderson Total population.</p> <p>Percent Female/Male: Sex and Age: Female/Male Estimate for Henderson County divided by Total population.</p> <p>Percent Minority: Sum Not Hispanic or Latino population estimates for Black or African American alone, American Indian and Alaska Native alone, Asian alone, Native Hawaiian and Other Pacific Islander alone, Some Other Race alone, Two or More Races, divided by total Not Hispanic or Latino population for Henderson County.</p>
2	NC OSBM, 2025, "County/State Population Projections."	Total 2025 population from Sex and Single Years of Age (2020–2060) data file.
3	NC OSBM, 2024a, "County Population Growth 2040–2050."	July 2050 Projected Population.
4	NCDHHS, 2025, North Carolina Aging Profiles 2023.	Population growth: 2043 Projection for Age 65+ for Henderson County.
5	National Economic Resilience Data Explorer, 2025, "County Data Explorer (Henderson County, NC)."	Special Need Indicators: Percent Urban and Percent Rural in Henderson County.
6	NC OSBM, n.d., "Henderson County Community Impacted by Hurricane Helene."	Agriculture: 2022 Land in Farms (Acres)
7	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. V-25.	
8	U.S. Census Bureau, 2023, "Selected Economic Characteristics."	<p>Median Household Income: Estimate in dollars</p> <p>Per Capita Income: Estimate in dollars</p>
9	MIT Living Wage Calculator, n.d., "Living Wage Calculation for Henderson County, North Carolina."	Required Annual Income Before Taxes (1 Adult, 1 Child)

10	Federal Reserve Bank of St. Louis, 2023, "Real Gross Domestic Product: All Industries in Henderson County, NC."	Real Gross Domestic Product: All Industries in Henderson County, NC (2023) (Units: Thousands of Chained 2017 U.S. Dollars, Not Seasonally Adjusted)
11	U.S. Census Bureau, 2023, "Poverty Status in the Past 12 Months."	Population for whom Poverty Status is Determined: Below Poverty Level Estimate
12	NCDOR, 2024, "County Property Taxes and Reappraisal Schedules, FY 2023–2024."	Henderson Tax Rate (Year of latest reappraisal: 2021) (All rates per \$100 valuation)
13	Feeding America, 2023, "Food Insecurity among the Overall Population in Henderson County."	North Carolina: Food Insecurity Rate in North Carolina (2023) Henderson County: Food Insecurity Rate in Henderson County (2023)
14	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. P. VI-6–7	Cost Burdened = paying more than 30% of income towards housing costs; Severe Cost Burdened = paying more than 50% of income towards housing costs.
15	U.S. Census Bureau, 2023, "Selected Housing Characteristics."	Homeowner Vacancy Rate: Housing Occupancy: Total housing units: Homeowner vacancy rate estimate Henderson County. Rental Vacancy Rate: Housing Occupancy: Total housing Units: Rental vacancy rate estimate Henderson County. Percent of Units with No Vehicle Available: Vehicles Available: Occupied housing units: No vehicles available estimate Henderson County. Occupied Housing Units: Housing Occupancy: Total housing units: Occupied housing units estimate Henderson County. Unoccupied Housing Units: Housing Occupancy: Total housing units: Vacant housing units estimate Henderson County.
16	Henderson County Chamber of Commerce. n.d. "Education."	
17	MyFutureNC, 2025, Henderson County 2025 Attainment Profile.	Percent Have Degree or Credential and percent No Degree of Henderson residents ages 25–44, 2023.
18	Data USA, 2023, "Henderson County, NC: Employment by Industries."	"People in Workforce" for the top 10 Industries across Henderson County.
19	U.S. Census Bureau, 2023, "Employment Status."	Population 16 years and over: Age: 20 to 74 years Labor Force Participation Rate Estimate

Appendix E: Madison County Profile Sources

Footnote	Citation	Notes
1	U.S. Census Bureau, 2023, "ACS Demographic and Housing Estimates."	<p>County Seat: Total population Estimate Marshall, NC Metro Area Total Population</p> <p>Age Distribution: Sum of population for 24 and under, 25 to 64, and 65+ divided by Madison Total population.</p> <p>Percent Female/Male: Sex and Age: Female/Male Estimate for Madison County divided by Total population.</p> <p>Percent Minority: Sum Not Hispanic or Latino population estimates for Black or African American alone, American Indian and Alaska Native alone, Asian alone, Native Hawaiian and Other Pacific Islander alone, Some Other Race alone, Two or More Races, divided by total Not Hispanic or Latino population for Madison County.</p>
2	NC OSBM, 2025, "County/State Population Projections."	Total 2025 population from Sex and Single Years of Age (2020–2060) data file.
3	NC OSBM, 2024a, "County Population Growth 2040–2050."	July 2050 Projected Population.
4	NCDHHS, 2025, North Carolina Aging Profiles 2023.	Population growth: 2043 Projection for Age 65+ for Madison County.
5	National Economic Resilience Data Explorer, 2025, "County Data Explorer (Madison County, NC)."	Special Need Indicators: Percent Urban and Percent Rural in Madison County.
6	NC OSBM, n.d., "Madison County Community Impacted by Hurricane Helene."	Agriculture: 2022 Land in Farms (Acres)
7	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. p. V–25.	
8	U.S. Census Bureau, 2023, "Selected Economic Characteristics."	<p>Median Household Income: Estimate in dollars</p> <p>Per Capita Income: Estimate in dollars</p>
9	MIT Living Wage Calculator, 2025, "Living Wage Calculation for Madison County, North Carolina."	Required Annual Income Before Taxes (1 Adult, 1 Child)

10	Federal Reserve Bank of St. Louis, 2023, "Real GDP: All Industries in Madison County, NC."	Real Gross Domestic Product: All Industries in Madison County, NC (2023) (Units: Thousands of Chained 2017 U.S. Dollars, Not Seasonally Adjusted)
11	U.S. Census Bureau, 2023, "Poverty Status in the Past 12 Months."	Population for whom Poverty Status is Determined: Below Poverty Level Estimate
12	NCDOR, 2023, "County Property Taxes and Reappraisal Schedules, FY 2023–2024."	Madison Tax Rate (Year of latest reappraisal: 2021) (All rates per \$100 valuation)
13	Feeding America, 2023, "Food Insecurity among the Overall Population in Madison County."	North Carolina: Food Insecurity Rate in North Carolina (2023) Madison County: Food Insecurity Rate in Madison County (2023)
14	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. P. VI-6-7	Cost Burdened = paying more than 30% of income towards housing costs; Severe Cost Burdened = paying more than 50% of income towards housing costs.
15	U.S. Census Bureau, 2023, "Selected Housing Characteristics."	Homeowner Vacancy Rate: Housing Occupancy: Total housing units: Homeowner vacancy rate estimate Madison County. Rental Vacancy Rate: Housing Occupancy: Total housing Units: Rental vacancy rate estimate Madison County. Percent of Units with No Vehicle Available: Vehicles Available: Occupied housing units: No vehicles available estimate Madison County. Occupied Housing Units: Housing Occupancy: Total housing units: Occupied housing units estimate Madison County. Unoccupied Housing Units: Housing Occupancy: Total housing units: Vacant housing units estimate Madison County.
16	Madison County Chamber of Commerce. n.d. "Educational Institutions – Schools."	
17	MyFutureNC, 2025, Madison County 2025 Attainment Profile.	Percent Have Degree or Credential and percent No Degree of Madison residents ages 25–44, 2023.
18	Data USA, 2023, "Madison County, NC: Employment by Industries."	"People in Workforce" for the top 10 Industries across Madison County.
19	U.S. Census Bureau, 2023, "Employment Status"	Population 16 years and over: Age: 20 to 74 years Labor Force Participation Rate Estimate

Appendix F: Transylvania County Profile Sources

Footnote	Citation	Notes
1	U.S. Census Bureau, 2023, "ACS Demographic and Housing Estimates."	<p>County Seat: Total population Estimate Brevard, NC Metro Area Total Population</p> <p>Age Distribution: Sum of population for 24 and under, 25 to 64, and 65+ divided by Transylvania Total population.</p> <p>Percent Female/Male: Sex and Age: Female/Male Estimate for Transylvania County divided by Total population.</p> <p>Percent Minority: Sum Not Hispanic or Latino population estimates for Black or African American alone, American Indian and Alaska Native alone, Asian alone, Native Hawaiian and Other Pacific Islander alone, Some Other Race alone, Two or More Races, divided by total Not Hispanic or Latino population for Transylvania County.</p>
2	NC OSBM, 2025, "County/State Population Projections."	Total 2025 population from Sex and Single Years of Age (2020-2060) data file.
3	NC OSBM, 2024a, "County Population Growth 2040-2050."	July 2050 Projected Population.
4	NCDHHS, 2025, North Carolina Aging Profiles 2023.	Population growth: 2043 Projection for Age 65+ for Transylvania County.
5	National Economic Resilience Data Explorer, 2025, "County Data Explorer (Transylvania County, NC)."	Special Need Indicators: Percent Urban and Percent Rural in Transylvania County.
6	NC OSBM, n.d., "Transylvania County Community Impacted by Hurricane Helene."	Agriculture: 2022 Land in Farms (Acres)
7	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. p. V-25.	
8	U.S. Census Bureau, 2023, "Selected Economic Characteristics."	<p>Median Household Income: Estimate in dollars</p> <p>Per Capita Income: Estimate in dollars</p>
9	MIT Living Wage Calculator, 2025, "Living Wage Calculation for Transylvania County, North Carolina."	Required Annual Income Before Taxes (1 Adult, 1 Child)

10	Federal Reserve Bank of St. Louis, 2023, "Real GDP: All Industries in Transylvania County, NC."	Real Gross Domestic Product: All Industries in Transylvania County, NC (2023) (Units: Thousands of Chained 2017 U.S. Dollars, Not Seasonally Adjusted)
11	U.S. Census Bureau, 2023, "Poverty Status in the Past 12 Months."	Population for whom Poverty Status is Determined: Below Poverty Level Estimate
12	NCDOR, 2023, "County Property Taxes and Reappraisal Schedules, FY 2023–2024."	Transylvania Tax Rate (Year of latest reappraisal: 2021) (All rates per \$100 valuation)
13	Feeding America, 2023, "Food Insecurity among the Overall Population in Transylvania County."	North Carolina: Food Insecurity Rate in North Carolina (2023) Transylvania County: Food Insecurity Rate in Transylvania County (2023)
14	Bowen National Research, 2025, Housing Needs Assessment Asheville Region, North Carolina. P. VI-6-7	Cost Burdened = paying more than 30% of income towards housing costs; Severe Cost Burdened = paying more than 50% of income towards housing costs.
15	U.S. Census Bureau, 2023, "Selected Housing Characteristics."	Homeowner Vacancy Rate: Housing Occupancy: Total housing units: Homeowner vacancy rate estimate Transylvania County. Rental Vacancy Rate: Housing Occupancy: Total housing Units: Rental vacancy rate estimate Transylvania County. Percent of Units with No Vehicle Available: Vehicles Available: Occupied housing units: No vehicles available estimate Transylvania County. Occupied Housing Units: Housing Occupancy: Total housing units: Occupied housing units estimate Transylvania County. Unoccupied Housing Units: Housing Occupancy: Total housing units: Vacant housing units estimate Madison County.
16	Transylvania County. n.d. "Education"	
17	MyFutureNC, 2025, Transylvania County 2025 Attainment Profile.	Percent Have Degree or Credential and percent No Degree of Transylvania residents ages 25–44, 2023.
18	Data USA, 2023, "Transylvania County, NC: Employment by Industries."	"People in Workforce" for the top 10 Industries across Transylvania County.
19	U.S. Census Bureau, 2023, "Employment Status."	Population 16 years and over: Age: 20 to 74 years Labor Force Participation Rate Estimate

Appendix G: Comprehensive S.W.O.T. Analysis



S.W.O.T Results

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> •Ample educational opportunities/higher education institutions •Strong STEM foundation and industries •Natural beauty/resources •Community, mutual aid, and local support systems •Robust creative community •High concentration of executive experience and expertise •Access to local philanthropy •Safe and desirable living environment •Access to public libraries and recreational facilities •Robust infrastructure for walking, biking, and outdoor activities •Foundation and history of strong tourism economy •Infrastructure to support small businesses •Increasing healthcare opportunities/options in the region 	<ul style="list-style-type: none"> •Shortage of affordable and middle-income housing •Lack of strong communications infrastructure •Inadequate childcare and adult daycare •Lack of middle career jobs and essential workers (educators, doctors, nurses, etc.) •Talent retention •Low wages •Inadequate transportation infrastructure •Lack of access to in-home healthcare •Insufficient mental health resources •Distance barriers between rural and urban areas •Damages resulting from Hurricane Helene 	<ul style="list-style-type: none"> •Ability to Leverage generative AI and other emerging technologies •Utilize innovative approaches to better rebuild transportation and resiliency infrastructure •Invest in innovative childcare solutions •Invest in affordable housing initiatives •Support early-stage innovators/companies to provide middle career job opportunities •Attract remote workers •Expand workforce development and training programs •Invest in small businesses and entrepreneurship •Strengthen agriculture and food supply chains •Leverage large aging adult population for volunteer base •Develop alternate energy projects 	<ul style="list-style-type: none"> •Uncertain funding sources •Federal policy changes •Gaps in geospatial asset data, capabilities, and staffing •NIMBYism •Increased healthcare needs as population ages •Population shifts leading to workforce challenges •Rising housing costs leading to displacement of residents •Environmental threats like water supply issues and extreme weather events •Economic vulnerabilities due to dependence on tourism •Losing agricultural land and green spaces •Decreasing affordability of health care



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