



St. Mary's County Economic Update

October 27, 2010

St. Mary's County Department of
Economic and Community Development



Department of Economic &
Community Development



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Summary

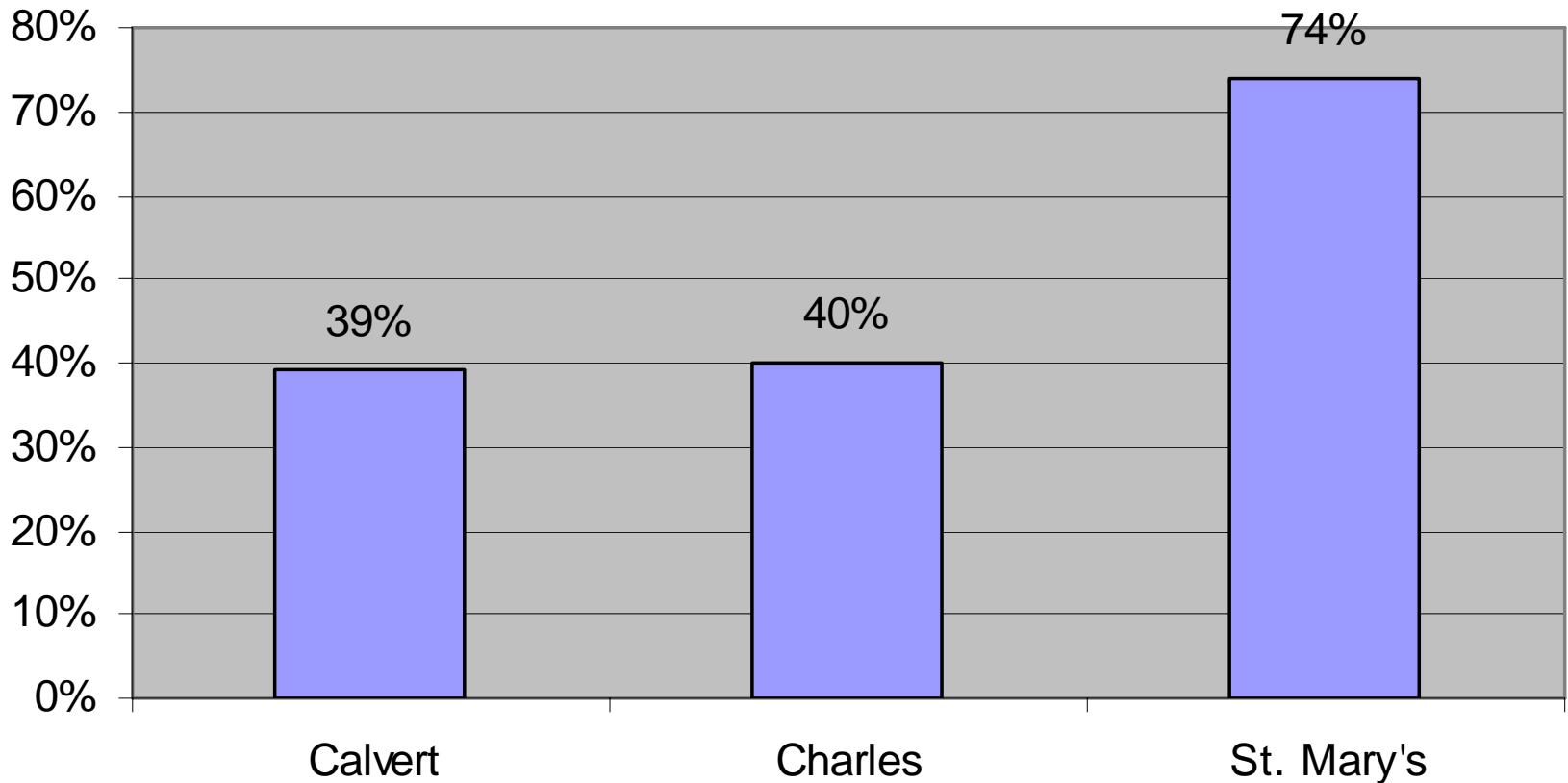
The purpose of this information packet, prepared by St. Mary's County Department of Economic and Community Development, is to distribute general data about St. Mary's County for public information and use. The data within this Economic Update is both qualitative and quantitative, and highlights St. Mary's County in comparison with sister counties of Calvert and Charles where appropriate. The statistics and data are to date as of October 2010. This information supplements similar data in the Economic Overview, Brief Economic Facts, and recent Economic Briefs.

A few St. Mary's County, MD Highlights for 2010 are below.

- Low unemployment rate (6.5%); Southern Maryland Region lowest in Maryland
- Lower average commute times than sister counties and state average
- High level of St. Mary's citizens living and working in county (74%), almost double the rate of sister counties
- Over the past five years, 2,719 jobs were created in St. Mary's County
- Average Weekly Wage is the highest in Southern Maryland region, and 2nd highest in Maryland
- St. Mary's County had the lowest average number of defaults and foreclosures in the region
- Four new business associations have been created along with several new small business initiatives
- Many new restaurants, hotels, and businesses moved into the County
- Many new capital projects and road improvements are finished or are underway
- Nearly 20,000 acres of land have been preserved in the County
- Tourism revenue has experienced the smallest percentage of decline in the region during the National Recession

Demographics

Residents Employed Within the County



Over 70% of St. Mary's County's 43,264 workers are employed within the county.

*(Commuting Patterns from US Census Bureau 2000)

Commuting Patterns in Southern Maryland

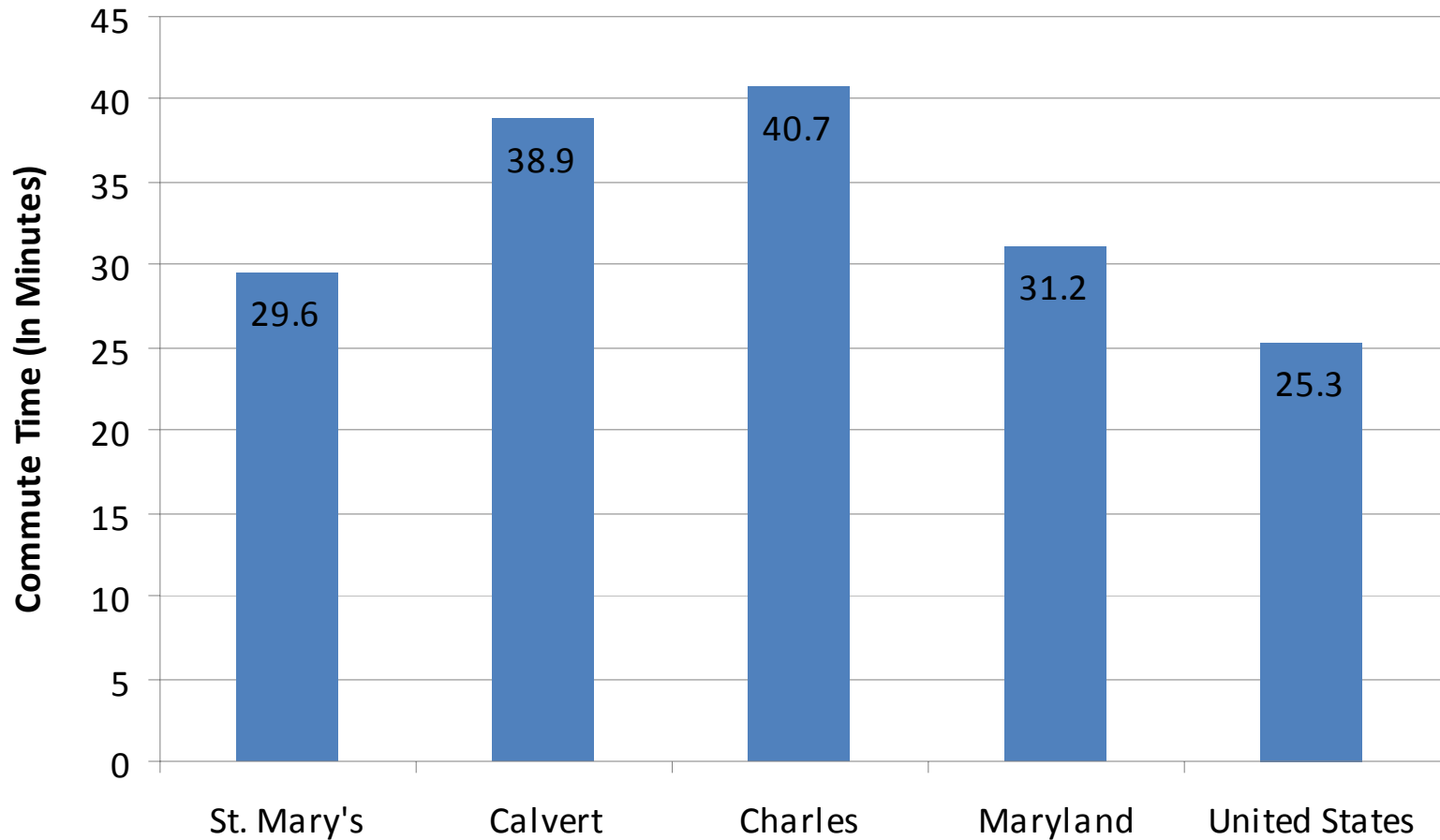
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	Calvert	Charles	St. Mary's	Other
Calvert	14,795	1,178	3,725	17,858
Charles	640	24,800	2,197	34,061
St. Mary's	1,779	3,313	32,134	6,038
Other	2,496	6,929	2,123	

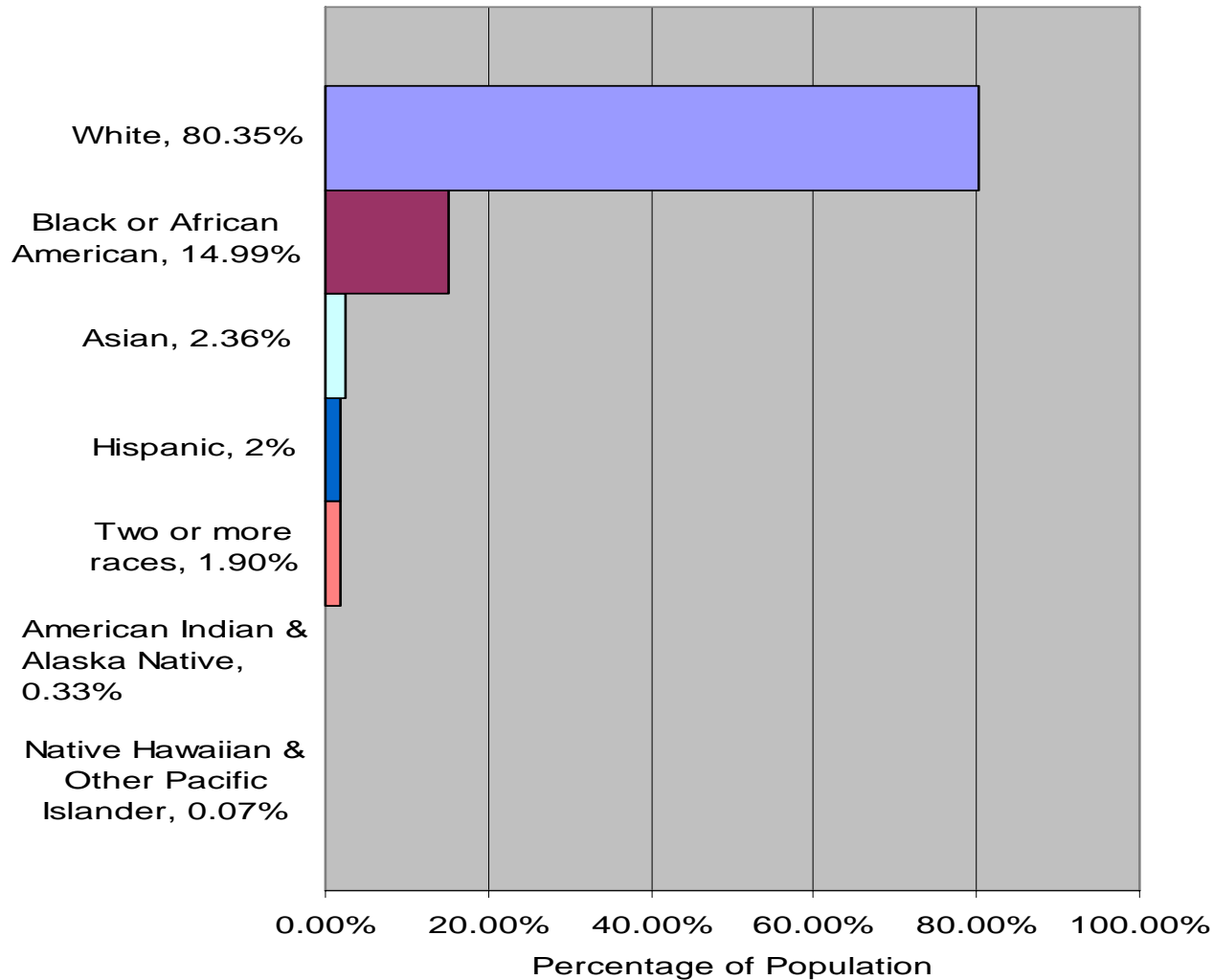
*U.S. Census Bureau, 2000

Average Travel Time to Work



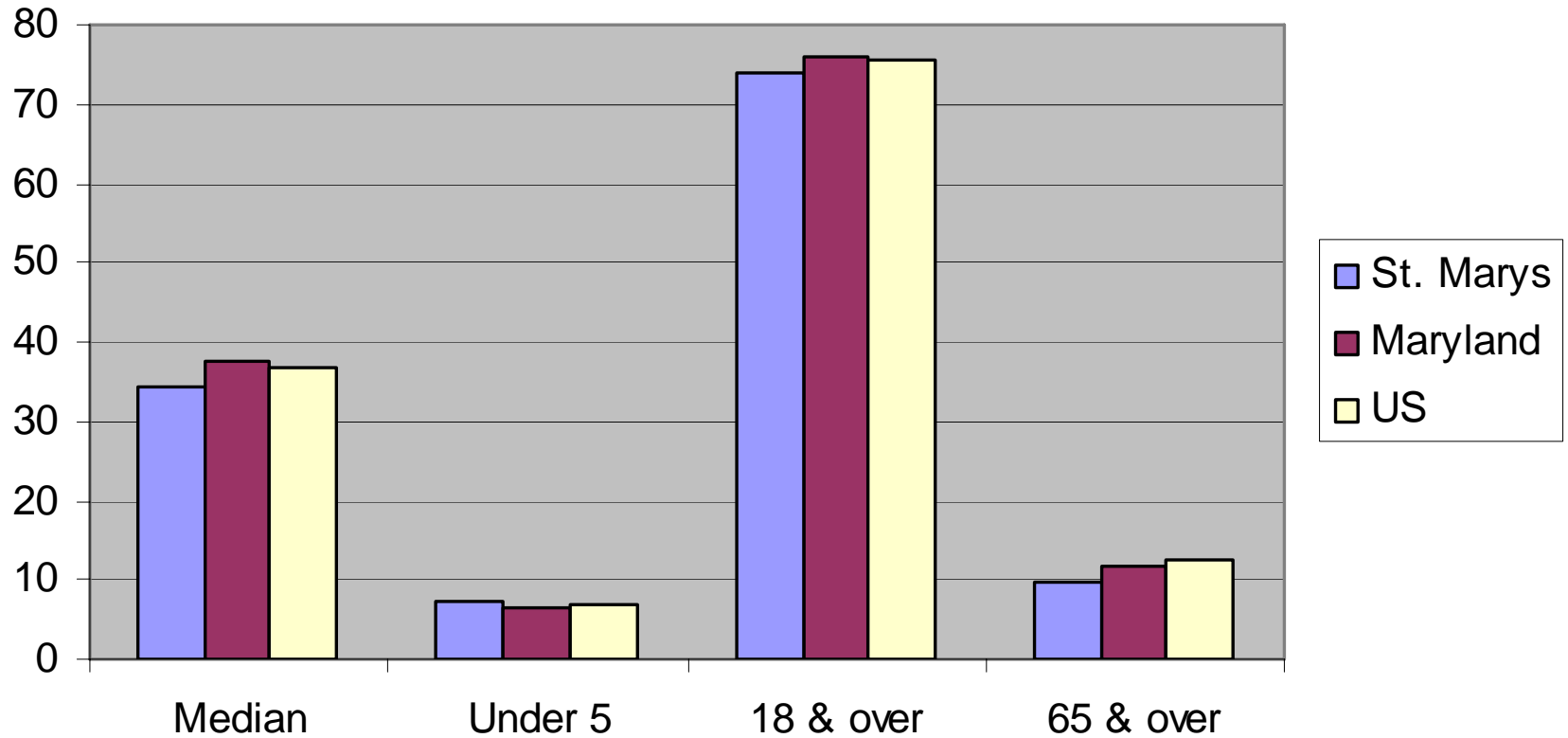
*June 11, 2010, US Census Data from 2009 estimates

Race/Ethnicity Breakdown



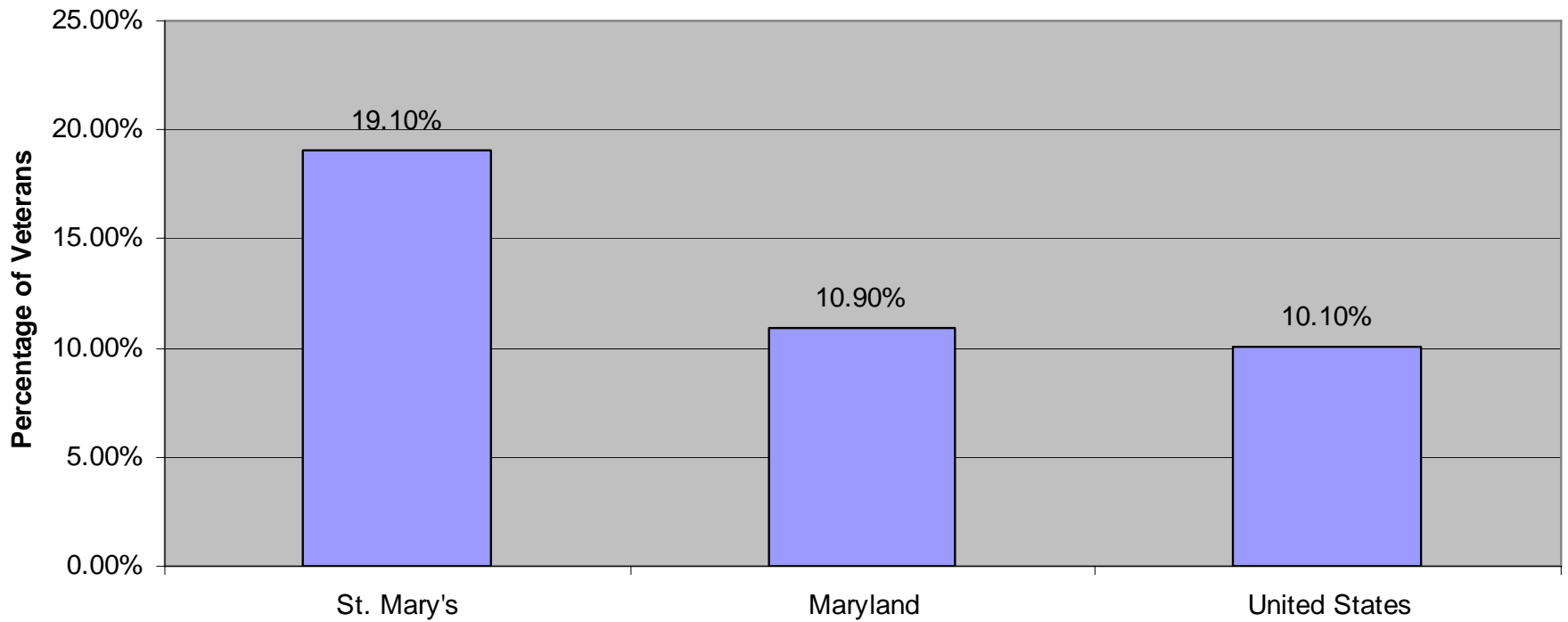
*June 11, 2010, US Census Data from 2009 estimates

Age in St. Mary's County

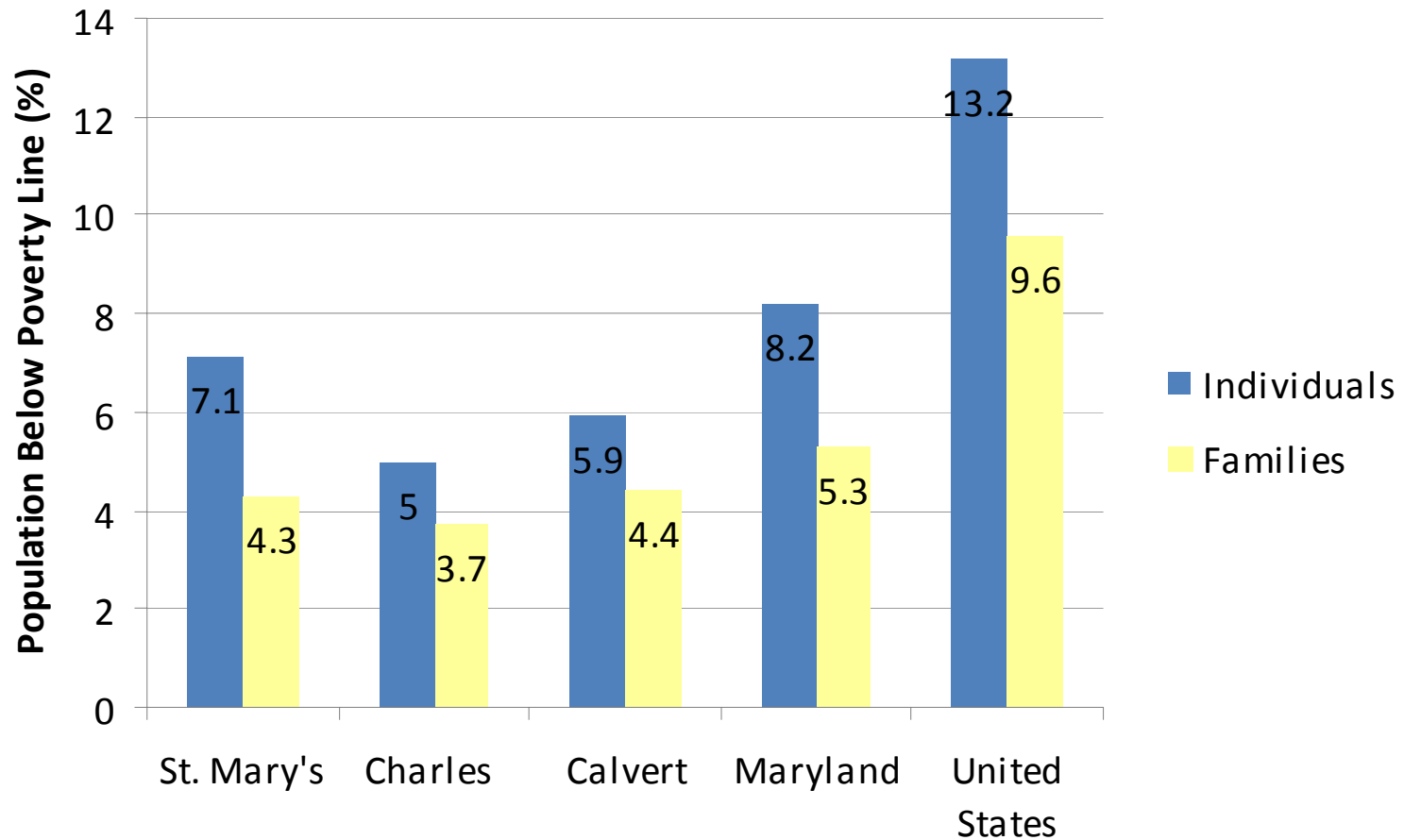


The Median Age in St. Mary's County is 34.6, the youngest in Maryland.

Veteran Population in St. Mary's County



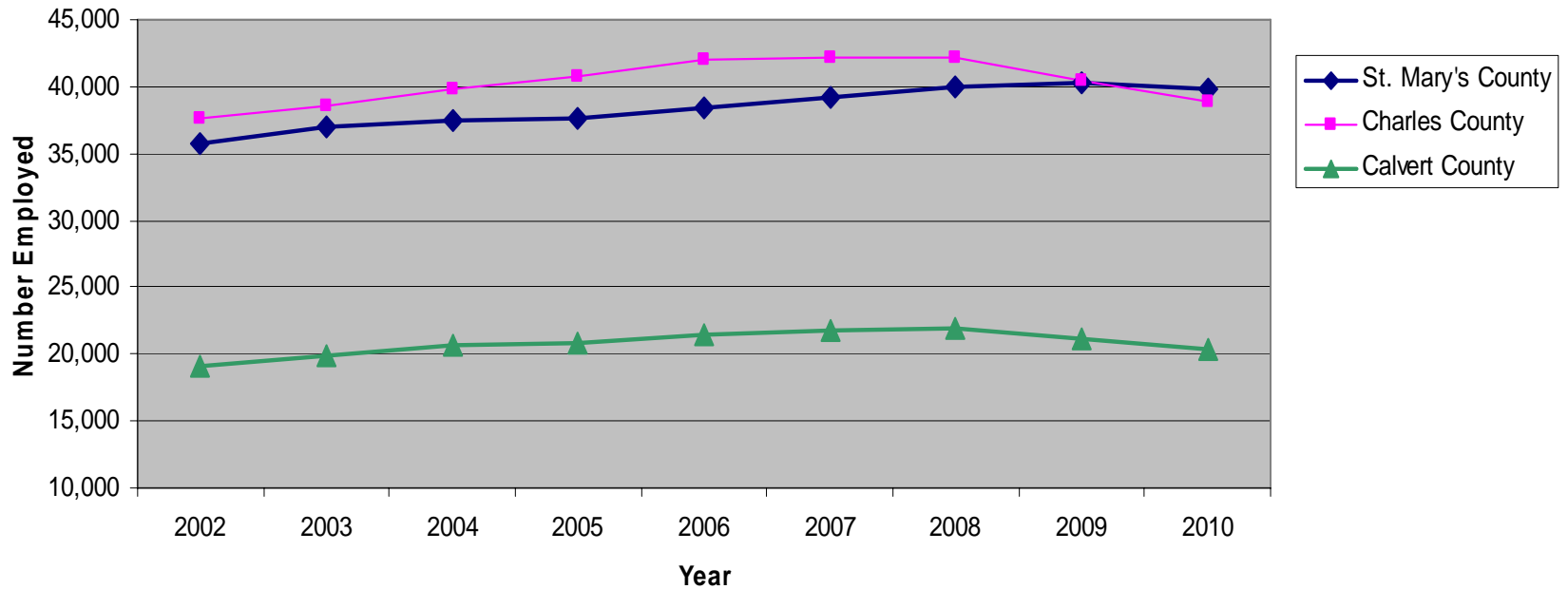
Individuals and Families Below Poverty Line (June 2010)



*June 11, 2010, US Census Data from 2009 estimates

Jobs

Employment Within Counties, 2002 – 2010 (YTD August 31, 2010)

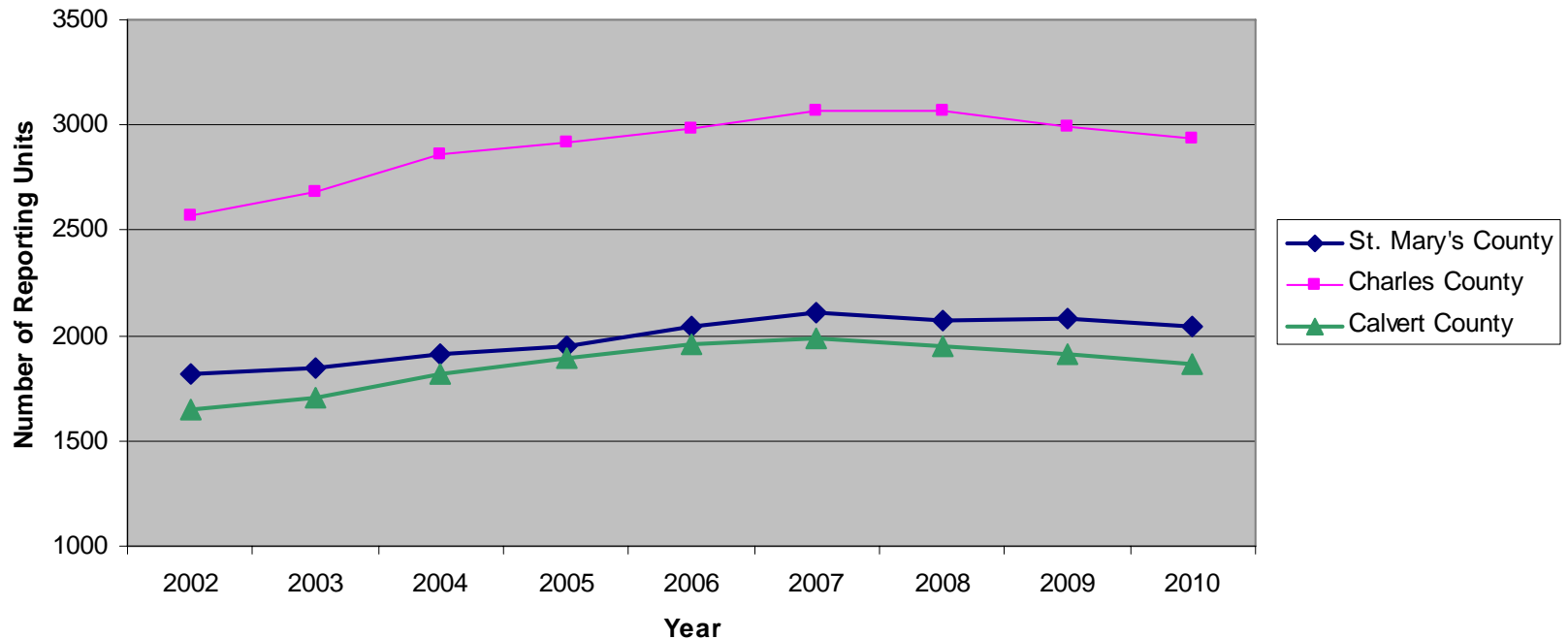


Over the past five years, 2,719 jobs were created in St. Mary's County.

*Graph does not start at zero to better demonstrate the data.

Source: Maryland Department of Labor, Licensing and Regulation. Employment and Payrolls Report, 2002 - 2010

Average Number of Employers by County, 2002 – 2010 (YTD August 31, 2010)



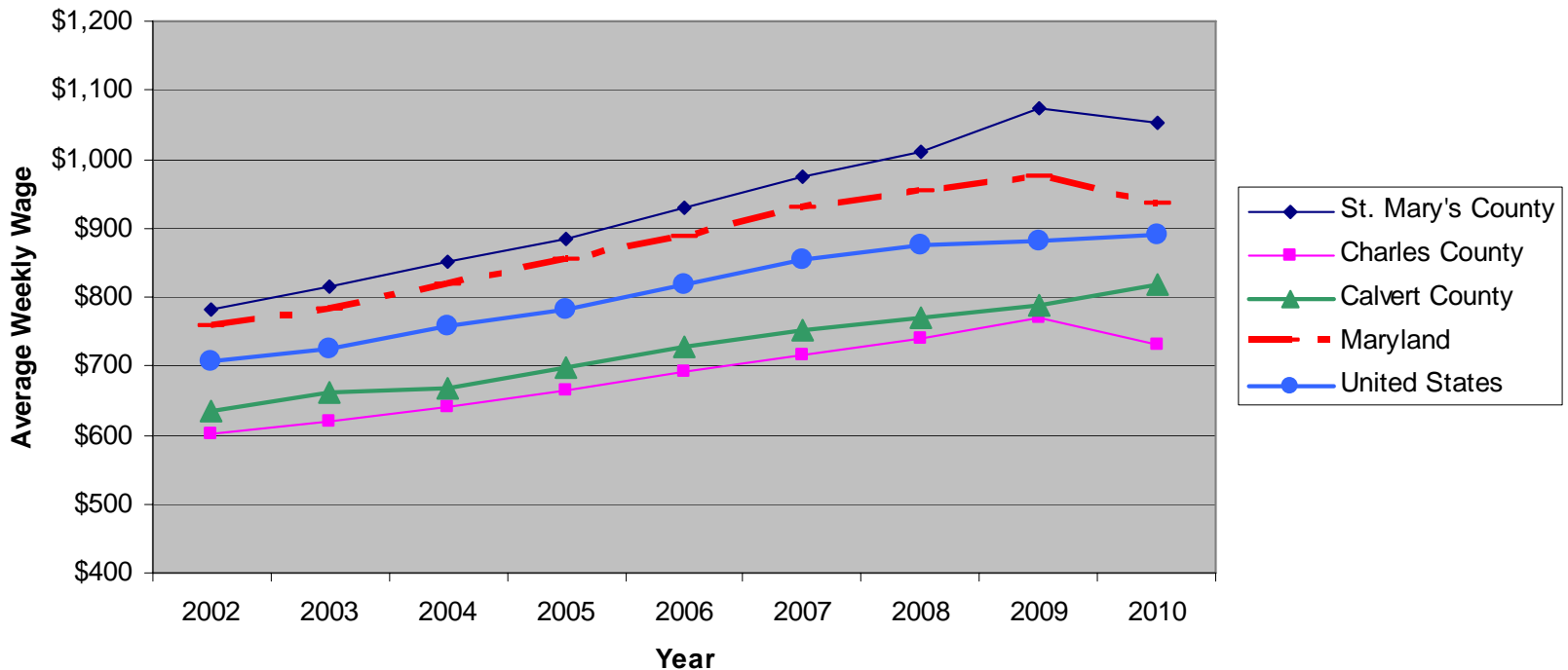
*The graph does not start at zero to better demonstrate the data.

Source: Maryland Department of Labor, Licensing and Regulation. Employment and Payrolls Report, 2002 – 2010.

Average Number of Employment Reporting Units by County, 2002- 2010

Average Weekly Wage per Worker, 2002 – 2010

(YTD August 31, 2010)

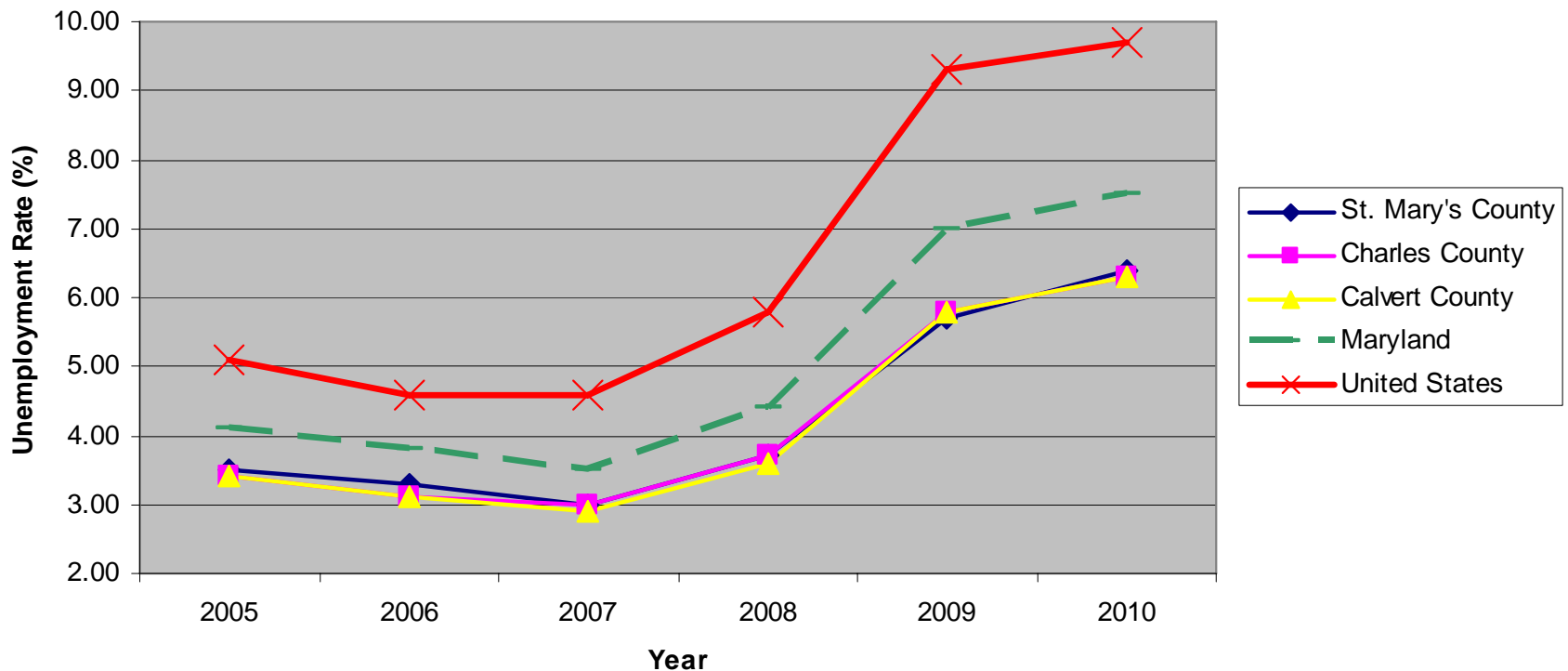


In 2009, St. Mary's County had the 2nd highest average weekly wage in Maryland.

*The graph does not start at zero to better demonstrate the data.

Source: Maryland Department of Labor, Licensing and Regulation. Employment and Payrolls Report, 2002 – 2010. United States Bureau of Labor Statistics, Employment and Wages

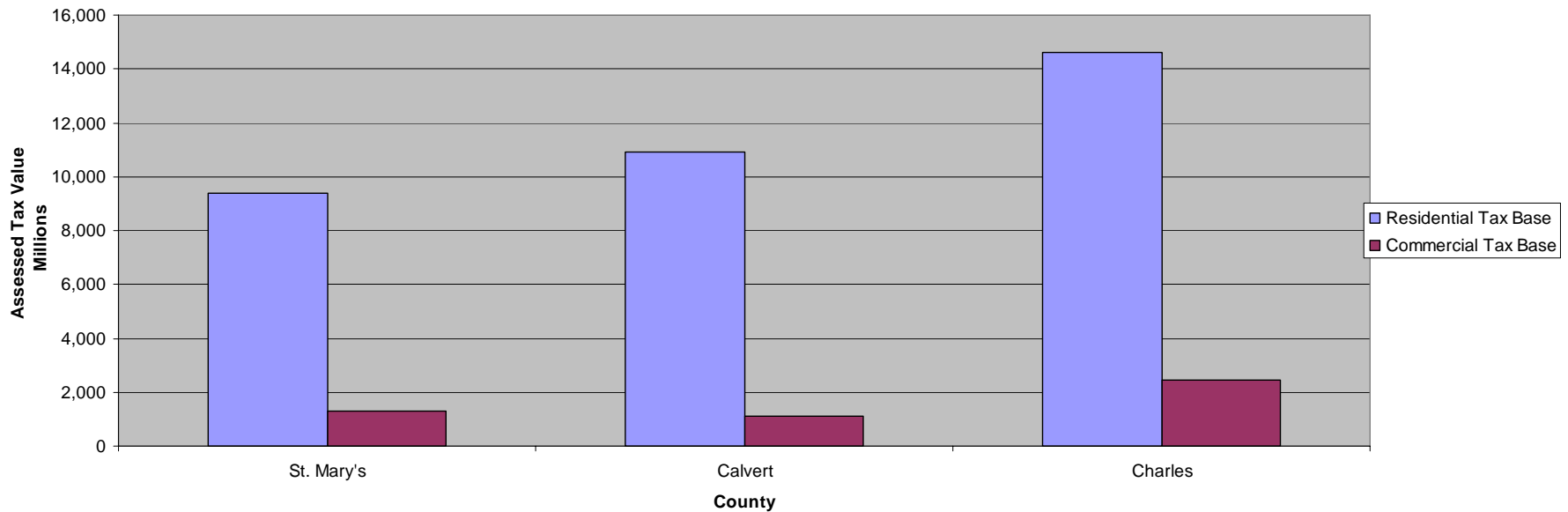
Annual Unemployment Rate, 2005 – 2010 (YTD August 31, 2010)



*The graph does not start at zero to better demonstrate the data.

Source: Maryland Department of Labor, Licensing and Regulation. Civilian Labor Force, Employment & Unemployment by Place of Residence, 2005 - 2010

Real Property Tax Base by County, 2009

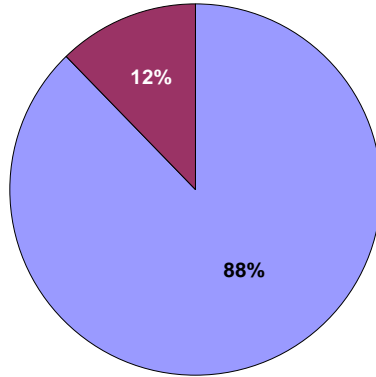


Source: Maryland Department of Assessments and Taxation, Annual Report for Fiscal Year 2009

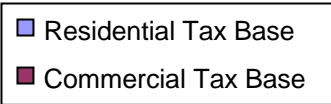
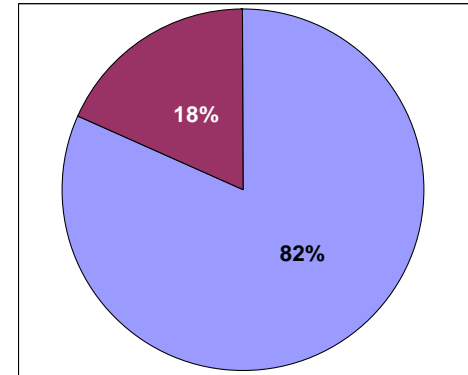
Real Property Tax Base by County

FY 2009

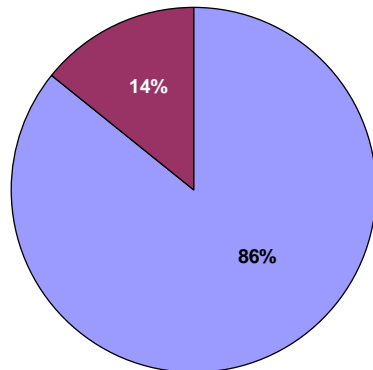
St. Mary's County



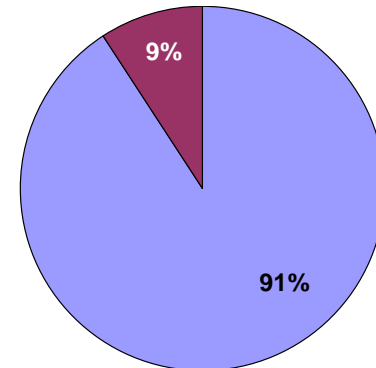
MARYLAND



Charles County

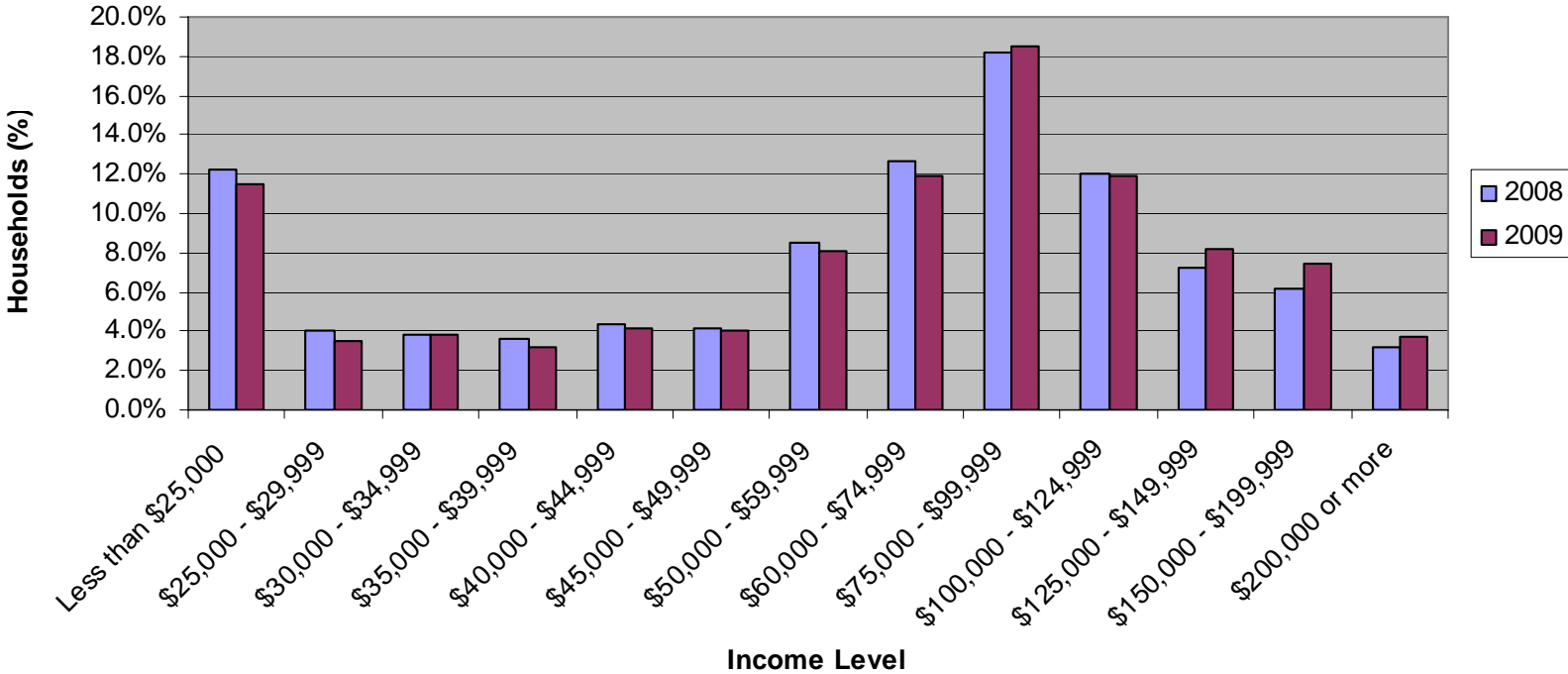


Calvert County



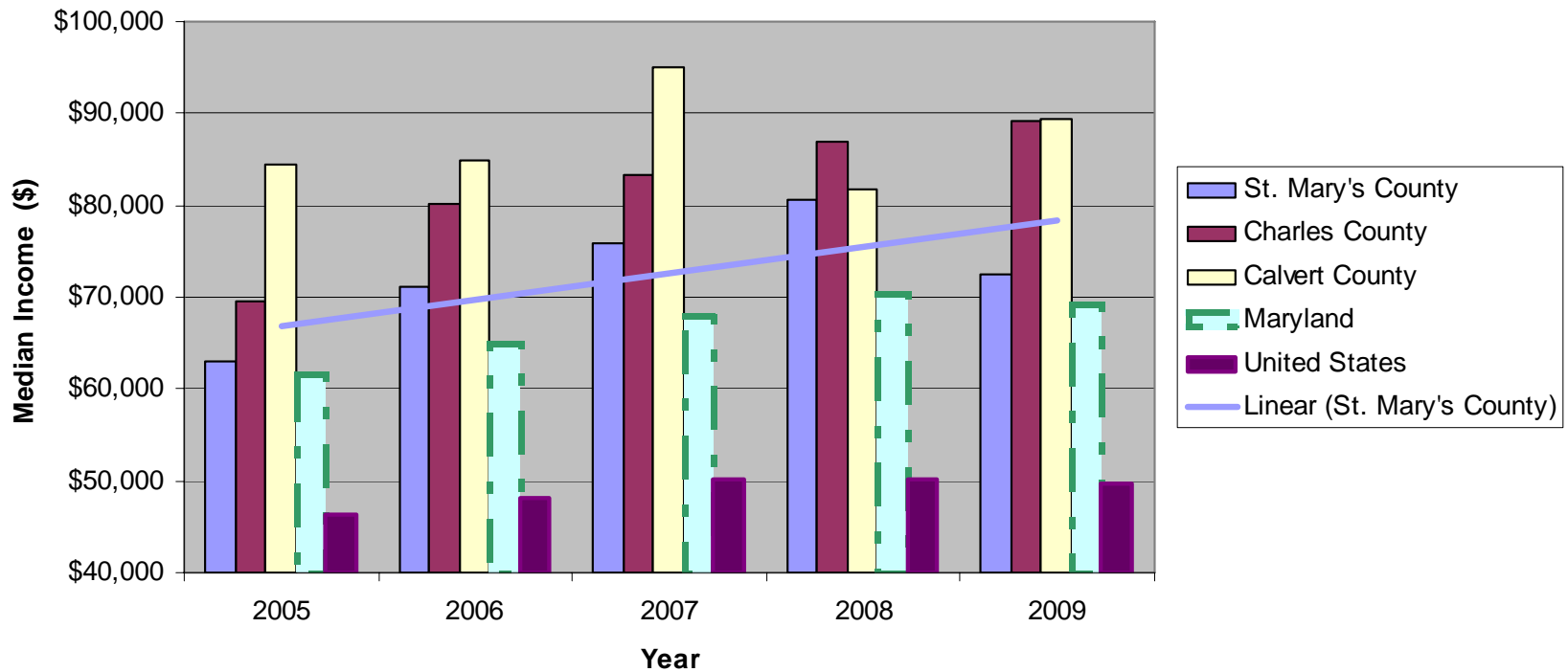
Income

Income Levels in St. Mary's County by Households, 2008 - 2009



Source: Real Property Research Group - Statistics for St. Mary's County, Maryland Report. August 28, 2009.

Median Household Income in Southern Maryland, 2005 - 2009



*The graph does not start at zero to better demonstrate the data.

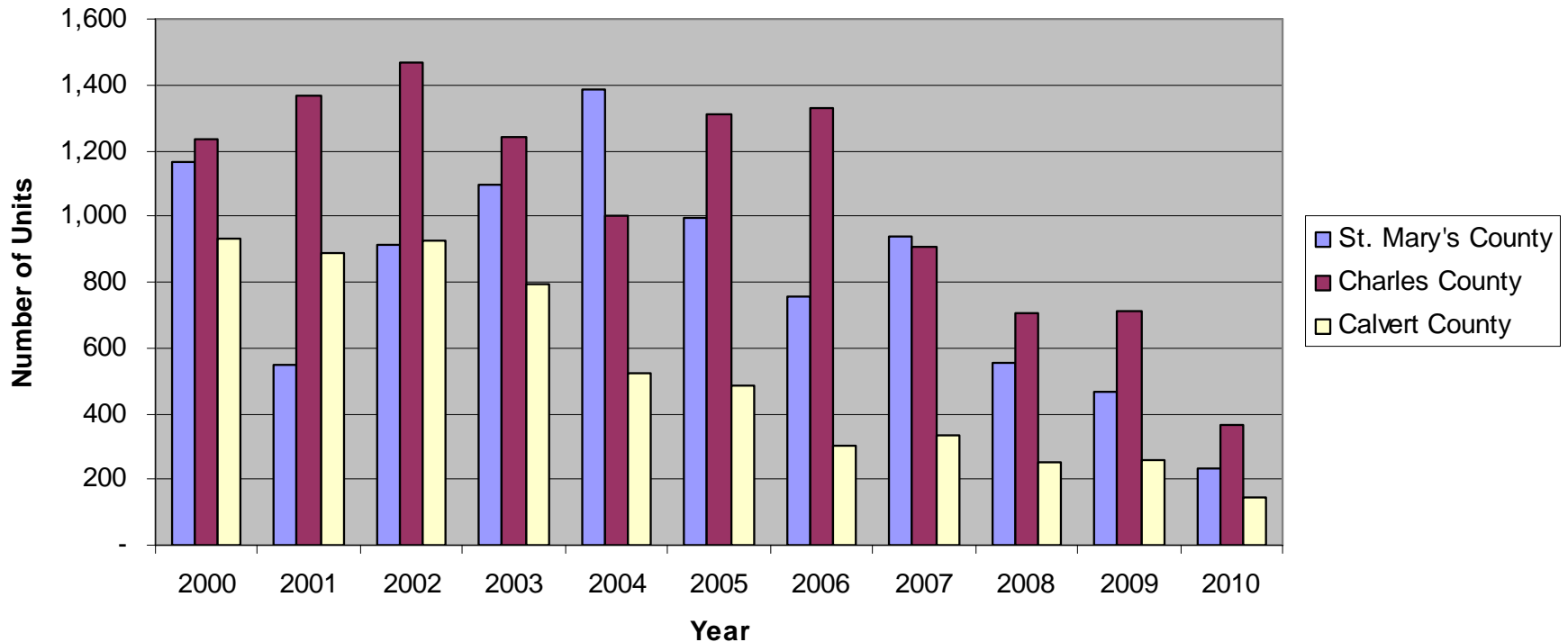
Source: U.S. Census Bureau American Fact Finder, Median Household Income for St. Mary's County, 2005 – 2009

*Contrast exists due to the presence of NAS Patuxent River, St. Mary's County's largest employer. Most residents of Charles and Calvert counties commute out of county.

Housing

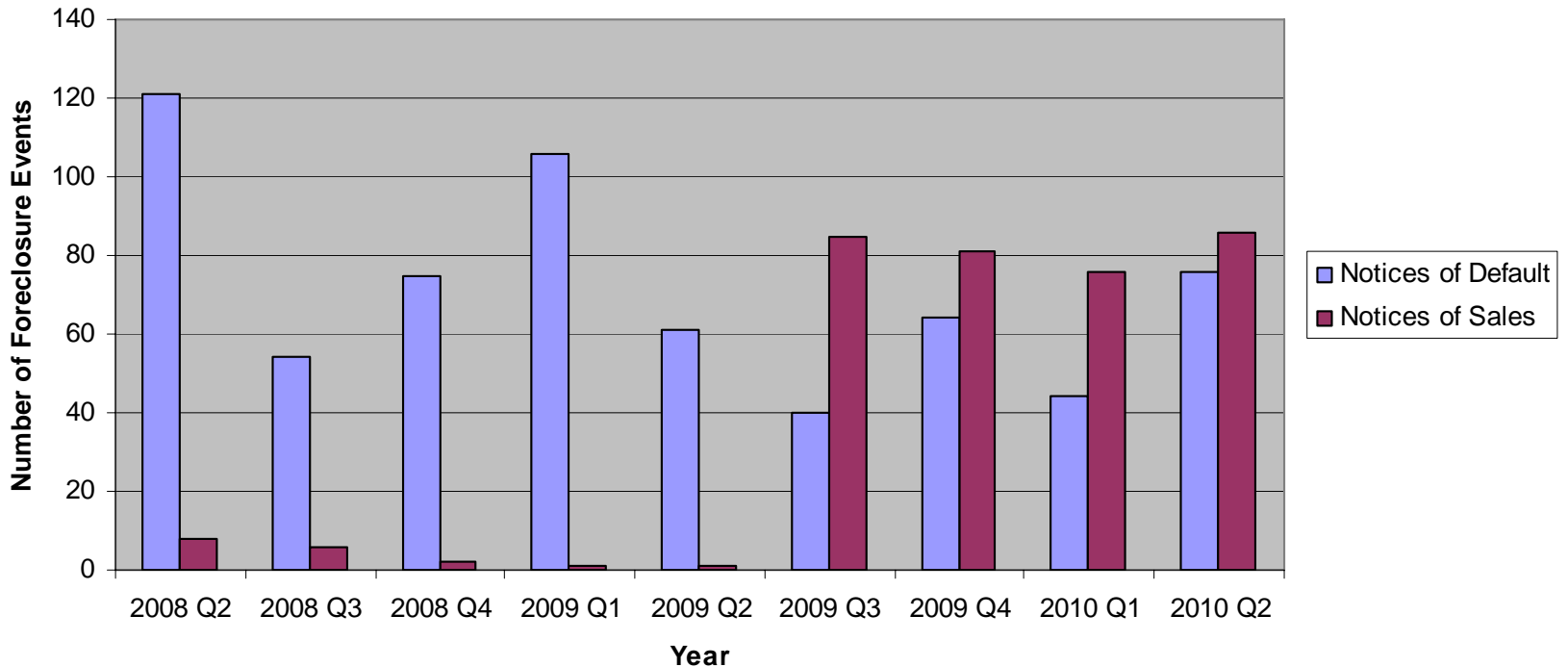
New Housing Units in Southern Maryland, 2000 – 2010

(YTD August 31, 2010)



Source: Maryland Department of Planning. Annual Report: Cumulative New Housing Units Authorized for Construction: Annual 2000 - 2010

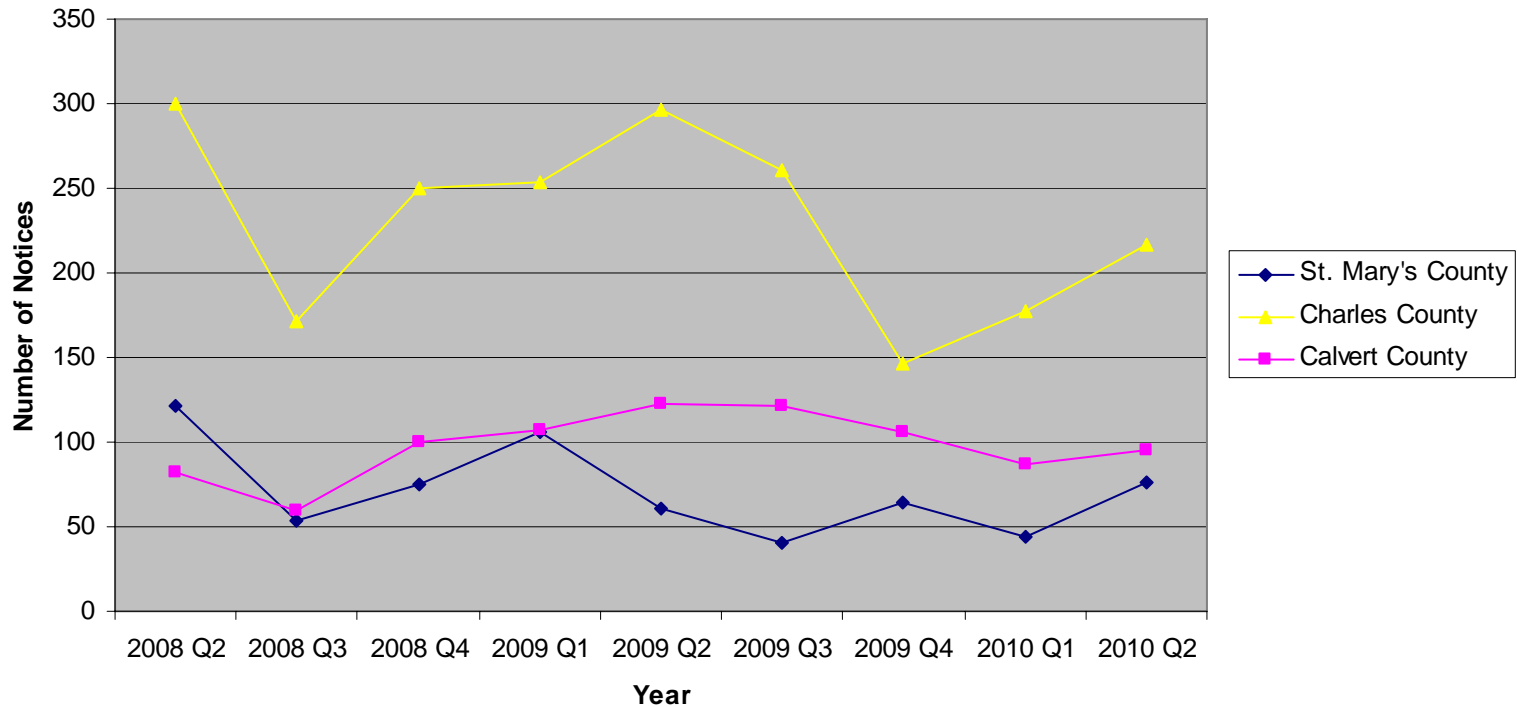
Property Foreclosure Events in St. Mary's County, FY 2008 Q2 – FY 2010 Q2



*Notices of Default are a formal notice to a borrower declaring that a default has occurred and that legal action may be taken. A notice of sale is the notice which a lender is usually required to give before foreclosure sale of collateral.

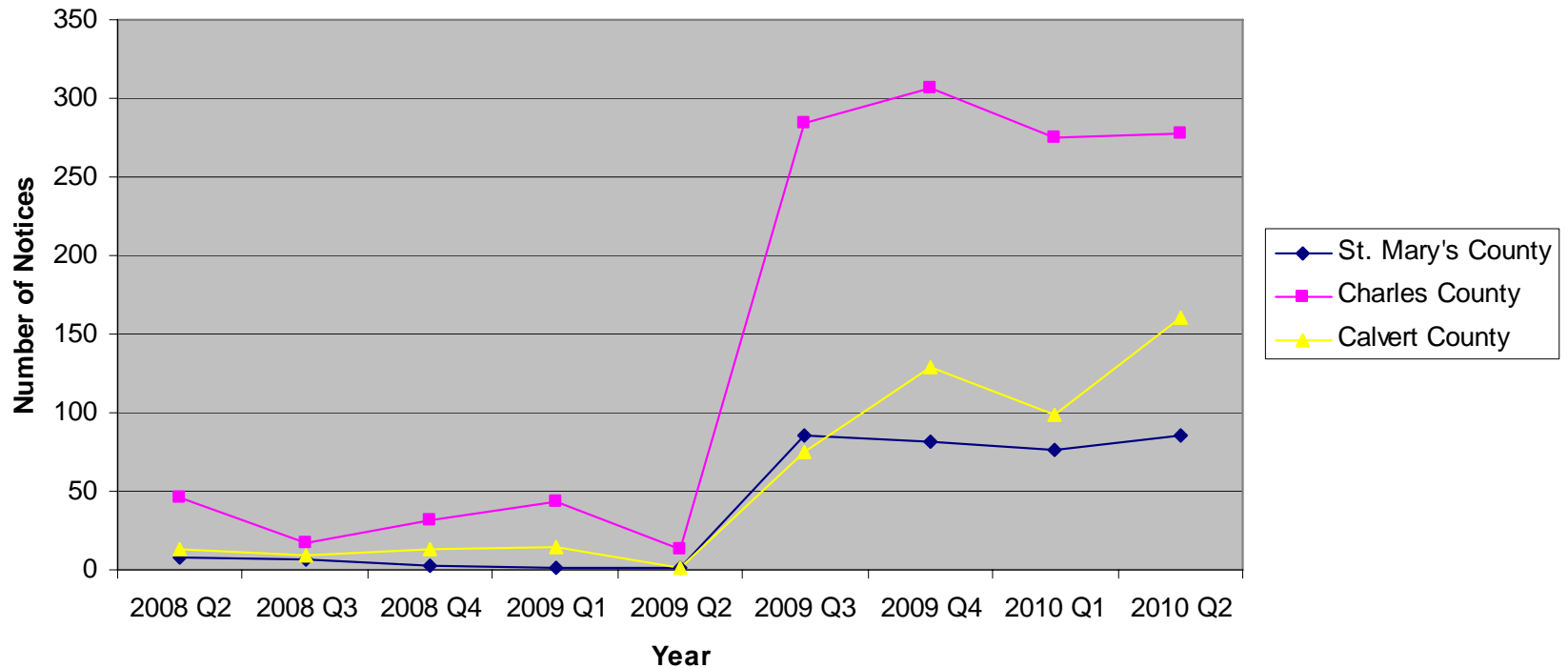
Source: Maryland Department of Housing and Community Development, Property Foreclosures in Maryland Quarterly Reports, FY 2008 Q2 – FY 2010 Q2

Foreclosure Notices of Default in Southern Maryland, FY 2008 Q2 – FY 2010 Q2



Source: Maryland Department of Housing and Community Development, Property Foreclosures in Maryland Quarterly Reports, FY 2008 Q2 – FY 2010 Q2

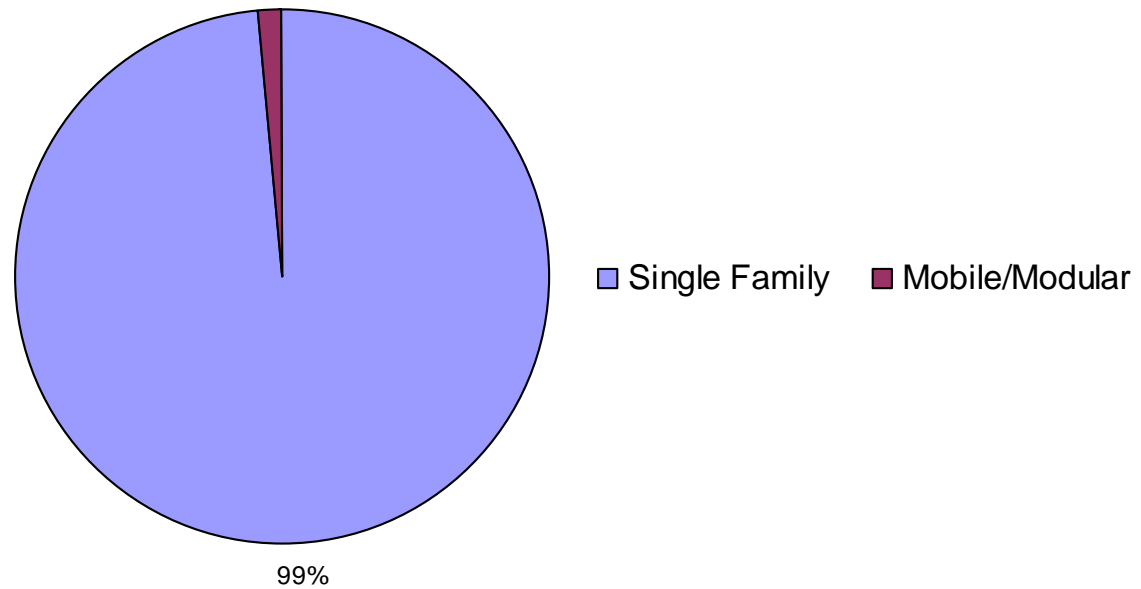
Foreclosure Notices of Sales in Southern Maryland, FY 2008 Q2 – FY 2010 Q2



Source: Maryland Department of Housing and Community Development, Property Foreclosures in Maryland Quarterly Reports, FY 2008 Q2 – FY 2010 Q2

Permits

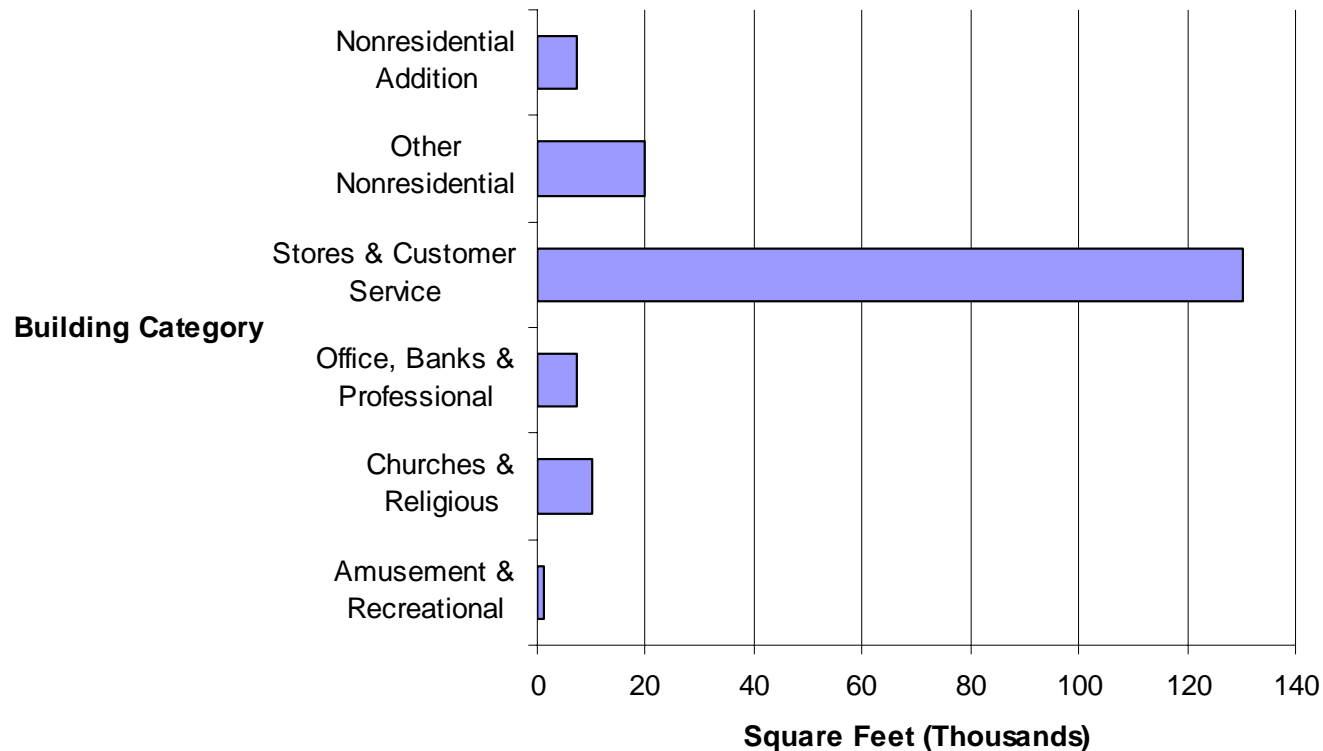
Residential Building Permits Issued in 2009



Source: 2009 St. Mary's County Planning Commission Annual Report

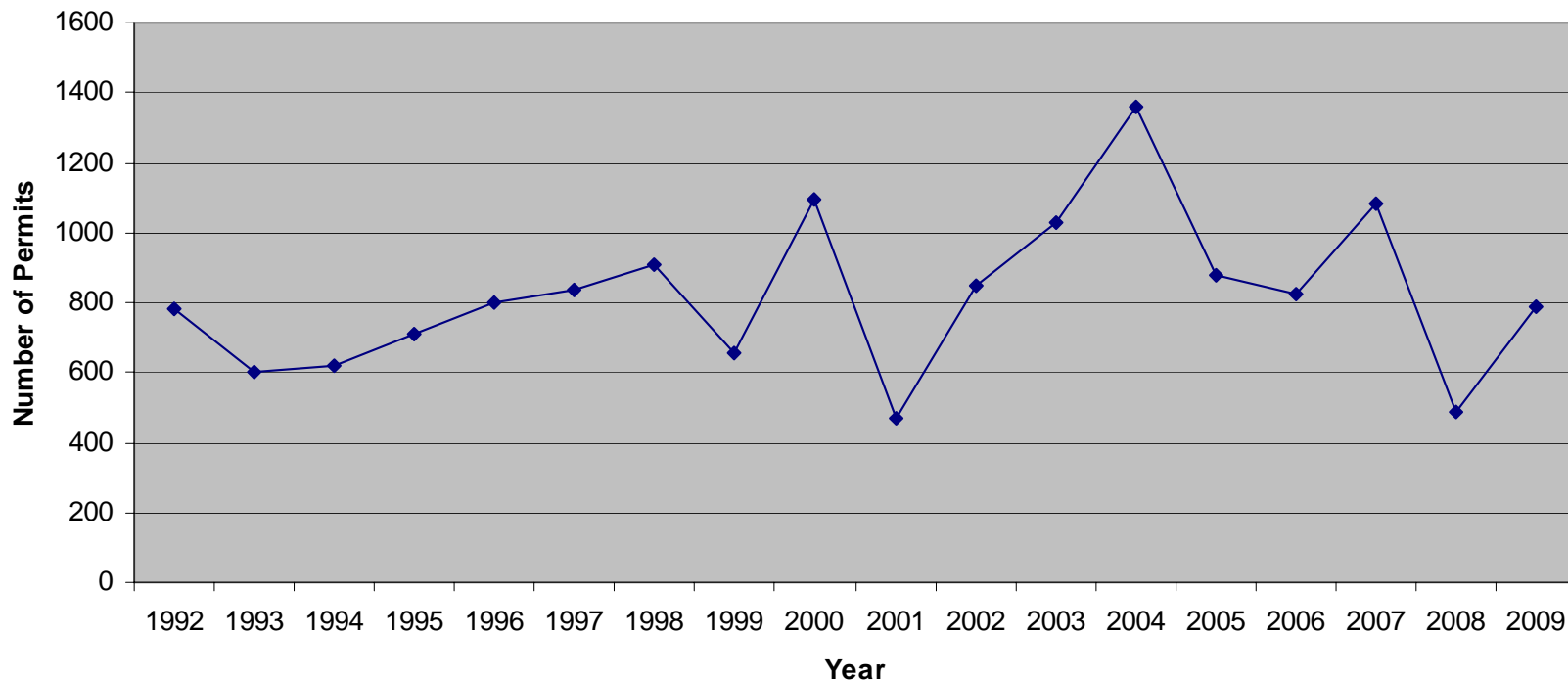
*There were no Multi-Family dwellings to report.

Commercial Building Permits Issued by Square Footage in St. Mary's County, 2009



Source: 2009 St. Mary's County Planning Commission Annual Report

Total Residential Building Permits Issued in St. Mary's County, 1992 - 2009



Source: St. Mary's County Planning Commission Annual Reports, 2008 - 2009

Business

Small Business Initiatives in St. Mary's County

Formation of Business Associations

1. South County Business Association, 2009
2. St. Mary's Square Merchants Association, 2009
3. Lexington Park Business and Community Association, 2010
4. SMIBA – St. Mary's Independent Business Association, 2010

*Many of these were modeled after the Leonardtown Business Association (LBA).

Spotlight on Small Business

St. Mary's DECD conducted the first annual Small Business Spotlight during Small Business Month in May 2010. These Business Associations were recognized along with the Leonardtown Business Association (LBA), the St. Mary's County Chamber of Commerce, the Patuxent Partnership, the Naval Aviation Small Business Roundtable, and Lenny's Restaurant. Eagan McAllister Associates, Inc was also recognized as the charter inductee into the newly created St. Mary's County Small Business Hall of Fame.

Recent Commercial Projects

- True Value Hardware 2 new stores - Leonardtown, Charlotte Hall
- Super Salvage – California
- Advance Auto Parts (2) Leonardtown and Lexington Park
- AutoZone (3) Lexington Park, Leonardtown, Charlotte Hall
- Marshall's – Great Mills
- Famous Footwear – Great Mills
- Toyota and Hyundai Dealerships - Lexington Park
- PNC Bank Lexington Park/California
- Cedar Point Federal Credit Union (2) - Pax River and Charlotte Hall
- Leonardtown Market Place –(Including: Ledo's, Salsa's, Business Townhouses)
- Lexington Village - Kohl's Lexington Park
- Imagine One Technology & Management, Ltd & DCS Corp. –Lexington Park
- Century 21 Office Building - California
- Dorsey Office Buildings - Hollywood
- Beck Office Building - REMAX – California
- Great Mills Trading Post – Great Mills
- Dr. Jarboe Building/Shah Associates - Lexington Park
- Boyd Medical Arts Building – Leonardtown
- SAIC building groundbreaking 80,000 sq. ft. office building - California, MD
- Smartronix - Corporate offices – Hollywood
- Guy Commercial Center - Leonardtown

Recent School and Housing Projects

Schools

St. Mary's College of Maryland

- Goodpaster Hall
- Glendening Hall
- River House Conference Center
- Historic St. Mary's City St. John's Archaeological Exhibit

College of Southern Maryland

- Wellness and Aquatics Center

St. Mary's Ryken High School

- New Stadium

St. Mary's Public Schools

- Evergreen Elementary
- Leonardtown Elementary renovation
- Leonardtown High limited renovation

**Chesapeake Charter School – Great Mills
King's Christian Academy**

Housing

- Abberly Crest expansion
- Leonard's Grant
- Leonardtown Farms
- St. Clements Crossing
- Broad Creek
- Bent Oaks
- Greenbrier expansion
- The Gateways
- Indian Bridge Apartments renovation
- Crossroad Apartments
- Wildewood Apartments/Condos
- Victory Woods Senior Housing
- Hunting Creek Townhouses – workforce housing project in Lexington Park

Recent Hotels and Restaurants

New Lodging

- Trent Hall B&B
- Hess House B&B
- Executive Inn Park Avenue - Leonardtown
 - Country Inn and Suites - California
- Town Place Suites by Marriott - Lexington Park
- Island Inn and Suites - St. Georges Island

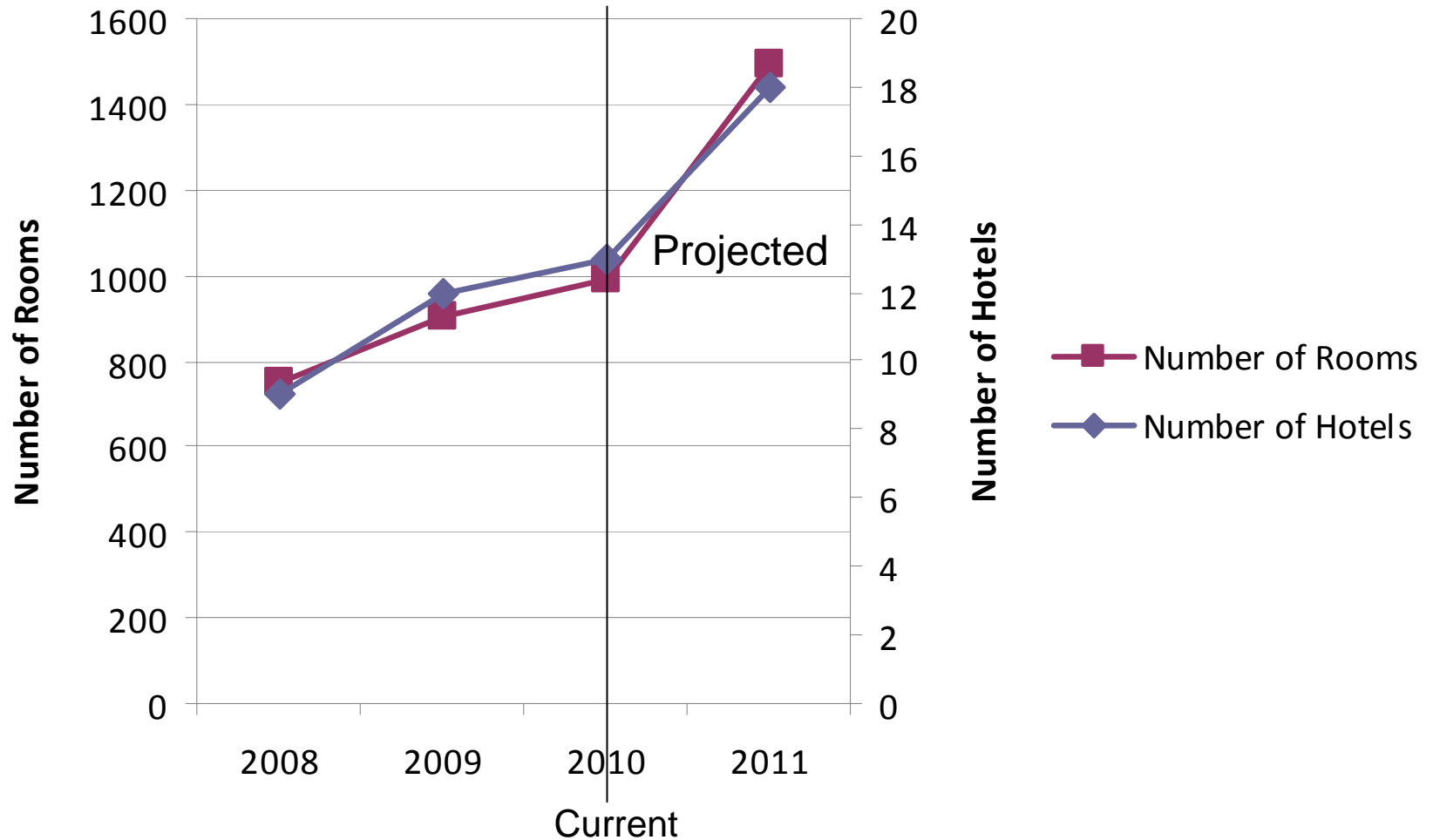
New Restaurants

- Olive Garden
- Red Robin
- Front Porch
- Leonardtown Grill
 - Salsa's
 - Fiesta Cafe
- Kevin's Korner Kafe
 - Olde Town Cafe
- Leonardtown Pub
 - Sake
 - Chipotle
- Long John Silvers
 - McDonald's
- Cheeseburger in Paradise
 - DB McMillan's
 - TeaRiffic
- Spyro's Bagels
- The Lexington
- Gridiron Grill

Recent Community Projects

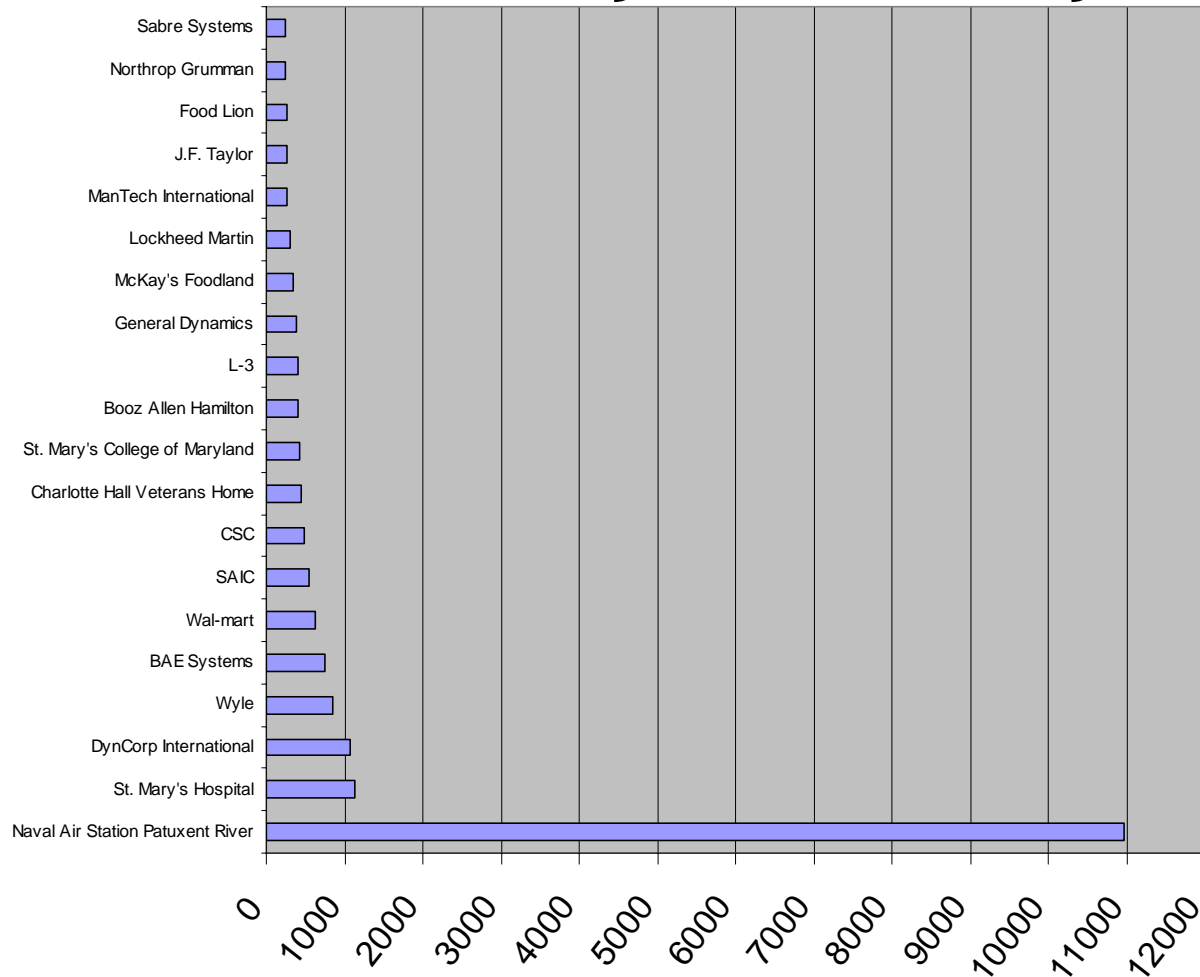
- Three Notch Trail sections
 - Blackistone Lighthouse
 - St. Mary's City Chapel
- Grace Chapel Ministries Church
 - Leonardtwn Wharf
 - Leonardtwn Streetscapes
- Great Mills Road streetscapes
- Chancellor's Run Road Improvement Project
- Loveville Farmer's Wholesale Auction site expansion
- Renovated Slave Cabin at Sotterley Plantation
 - Hospice House of St. Mary's – Callaway
 - New Fairgrounds Buildings
 - Hope Place, Walden Sierra
 - Restore, Patuxent Habitat for Humanity

Number of Hotels and Rooms in St. Mary's County



*2011 numbers are projected

Major Employers in St. Mary's County

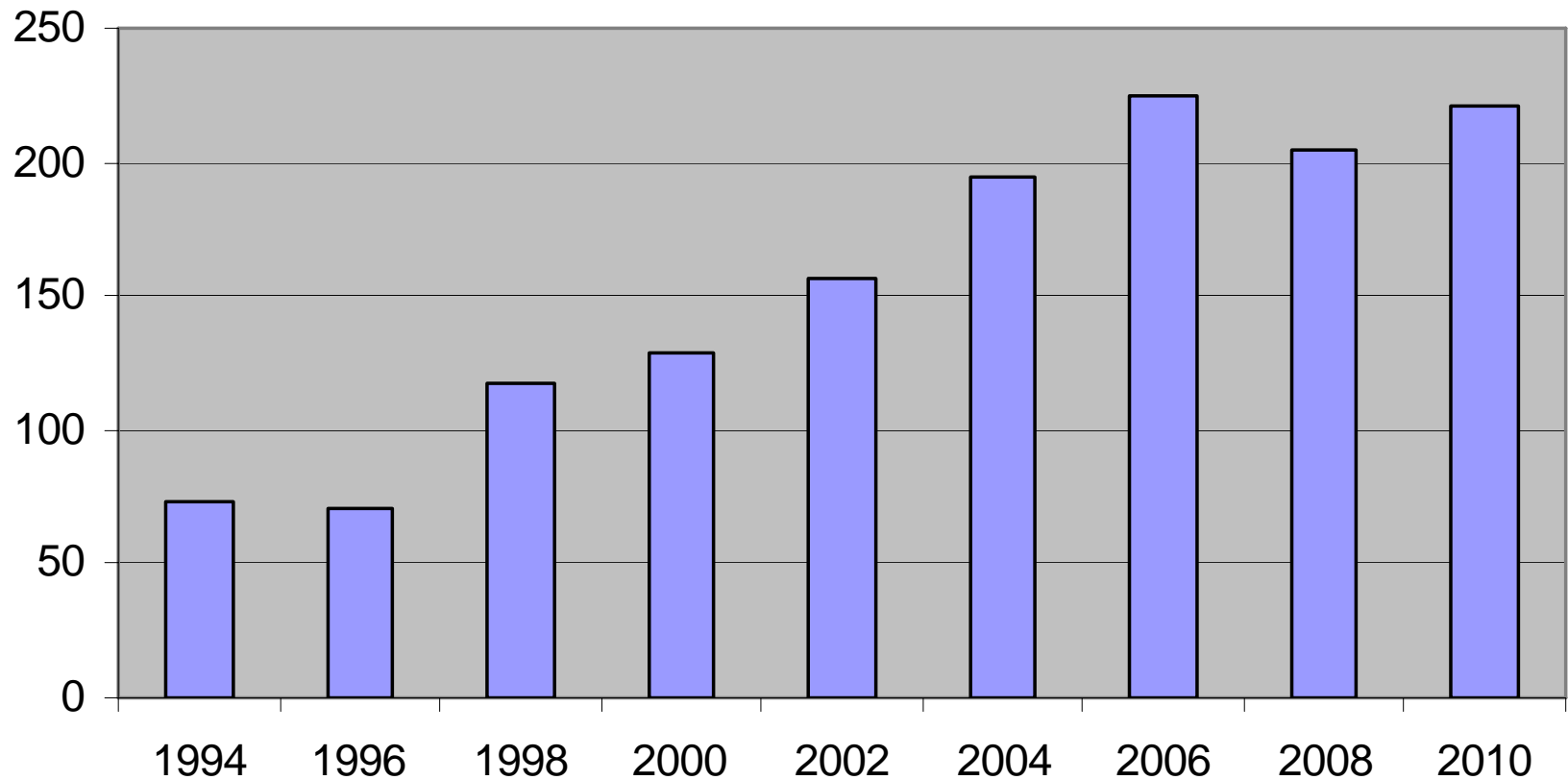


*Not including St. Mary's County Government or St. Mary's County Public Schools

*St. Mary's County DECD, Sept. 2009

Company Listings

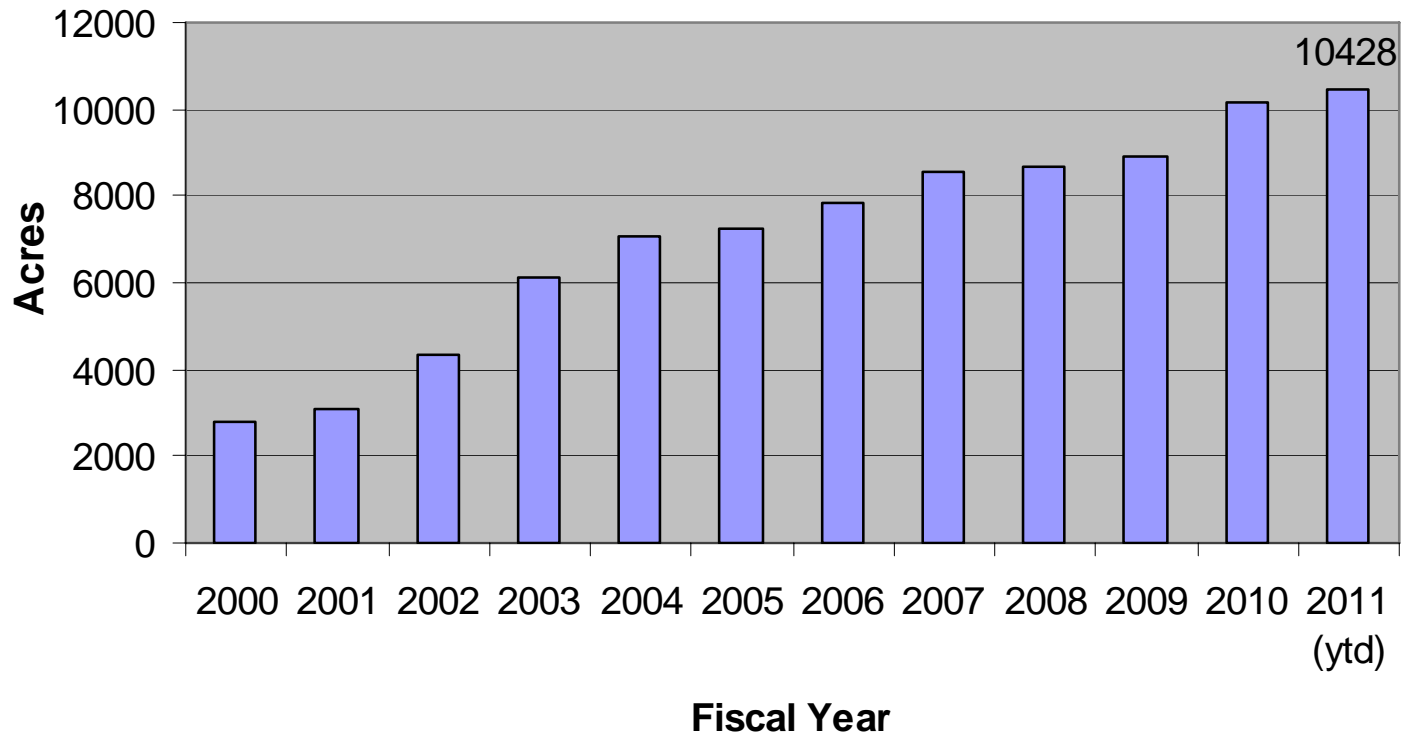
Technology Handbook 1994-2010



*Re-evaluation (including deletion of duplicates, listing of mergers and acquisitions, etc) of listed companies reduced the total number of companies listed in 2008.

Land Preservation

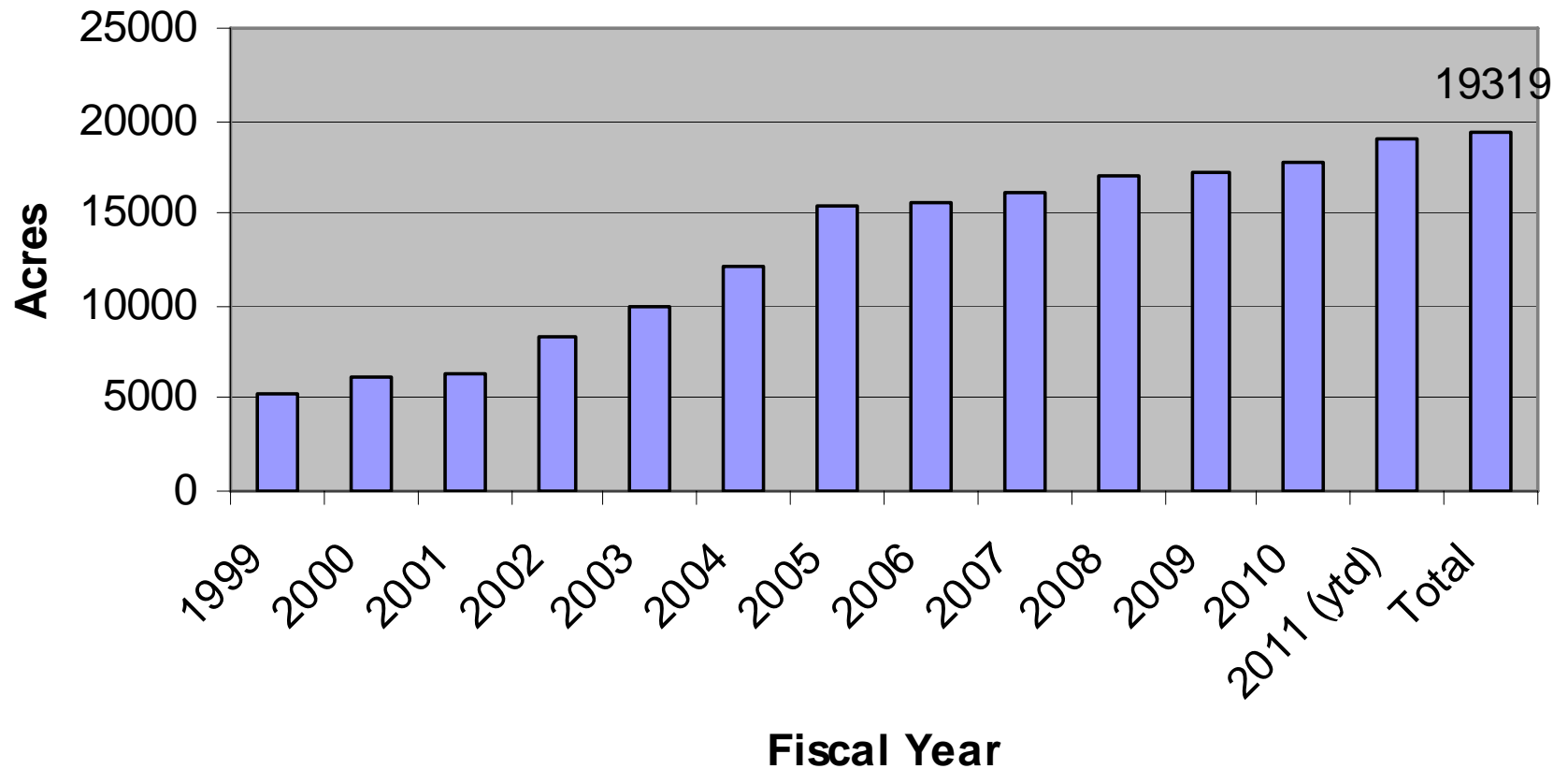
MALPF Cumulative Average Acres Preserved in St. Mary's County FY2000-FY2011 (ytd)



*Maryland Agriculture Land Preservation Foundation (MALPF) purchases agricultural preservation easements that forever restrict development on prime farmland and woodland.

Cumulative Acreage Preserved FY1999 – FY2011

(Including MALPF, Maryland Historic Trust, and Rural Legacy)



Tourism

New Tourism Infrastructure

- Regional Sign program: Tourism Area and Corridor Sign program
- New state park: Newtowne Neck
- New or expanded sites and attractions
- Historic St. Mary's City: St. John's Site, Brick Chapel
- St. Clement's Island: Blackistone Lighthouse
- Colored Troops Civil War Monument
- Port of Leonardtown Winery
- Slack Winery at Woodlawn Farm
- Visitor Services: St. Mary's County Welcome Center

New Products and Campaigns

Products

Potomac Heritage Trail
National Religious Freedom By-way
Lower Potomac Water Trails

Marketing Campaigns and Initiatives

Celebrate 375 (2009)

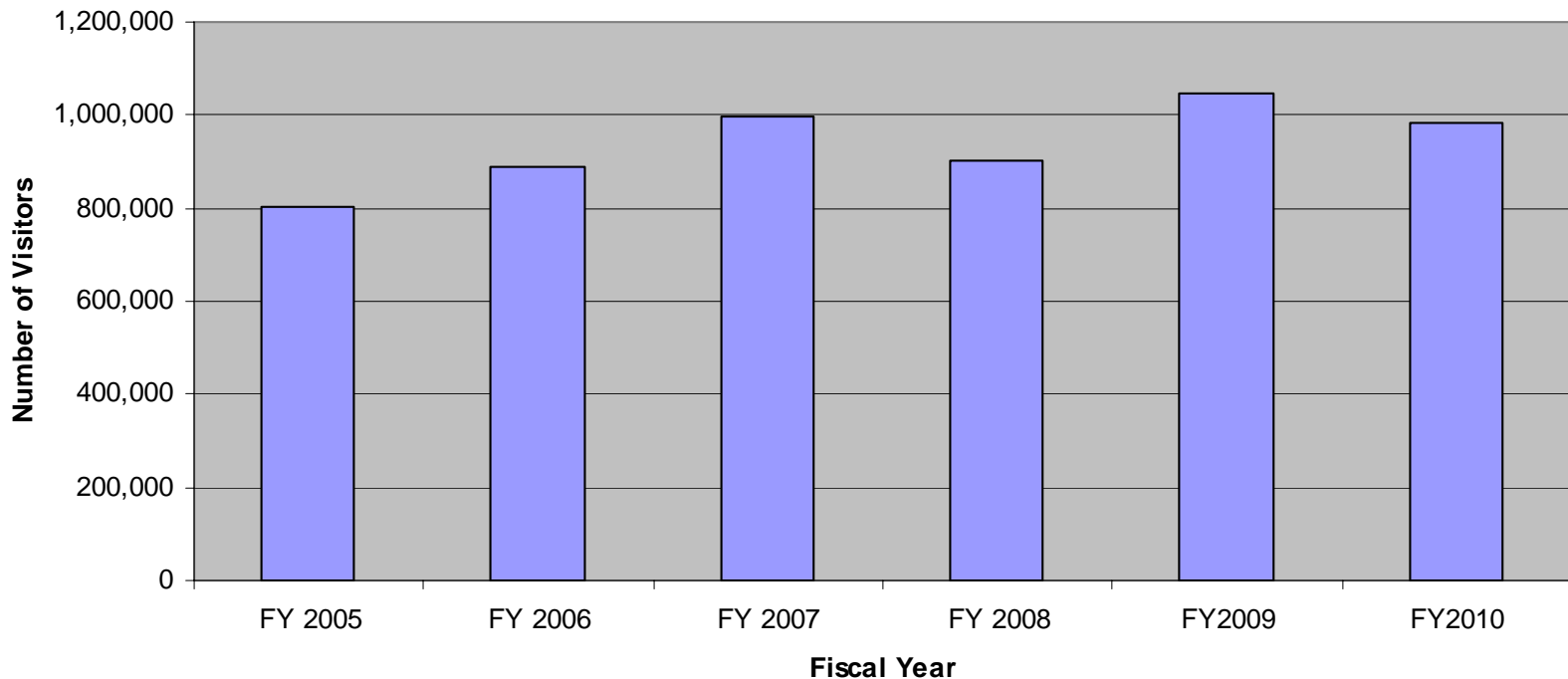
Branding program: Where the Potomac Meets the Chesapeake
Expanded and upgraded Visitor and Relocation guide
2011 Naval Aviation Centennial

Operational

George Washington University Case Study
Regional Marketing consolidation under So MD Heritage Area
Destination Electronic Marketing Program
Twitter following, Blog, and Refreshed Website
Monthly Tourism E-Newsletter

Total Visitation to Sites and Attractions, FY 2005 – FY 2010

(Historic St. Mary's City, Patuxent River Naval Air Museum, Point Lookout State Park, Greenwell State Park, St. Mary's River State Park, Maryland International Raceway)

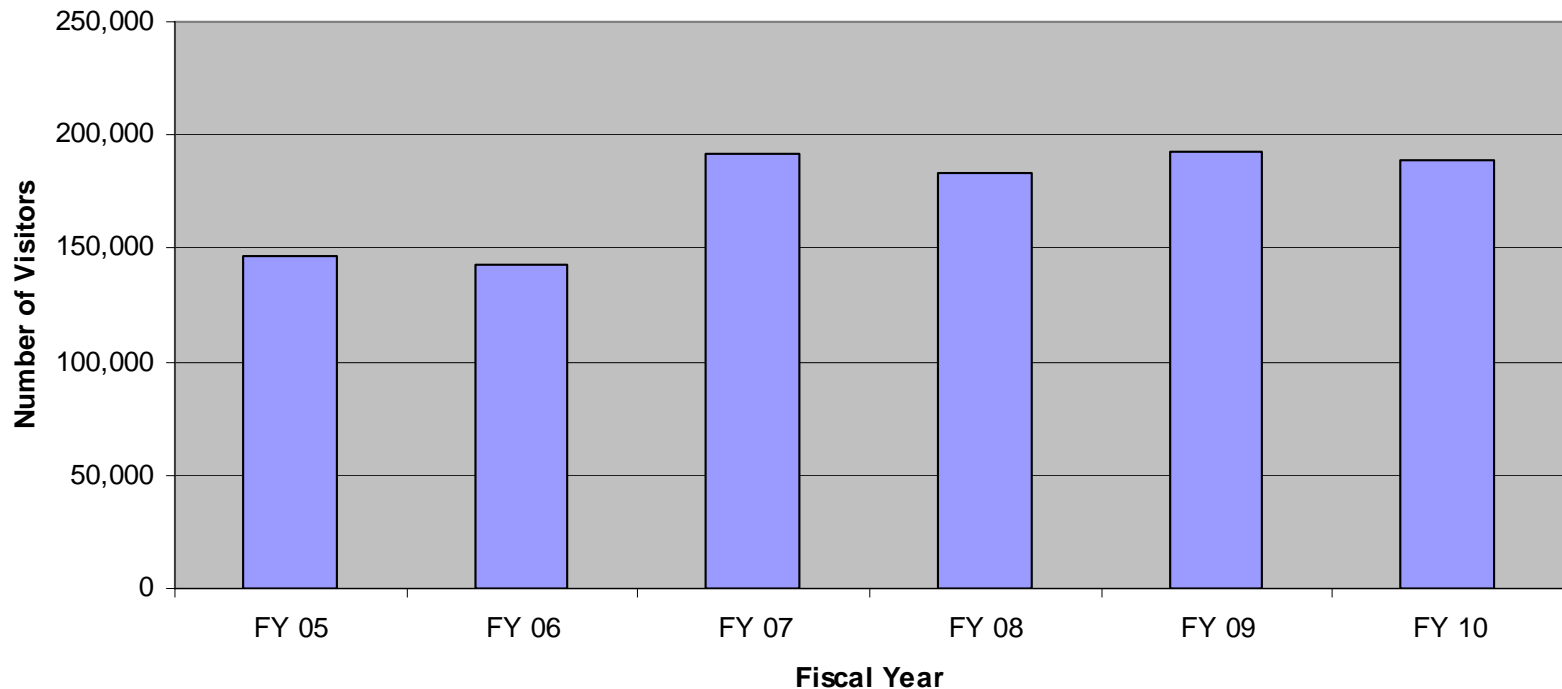


* Celebrate 375 campaign occurred during FY 2009.

Source: St. Mary's County Division of Tourism

Total Visitation to Special Events, FY 2005 – FY 2010

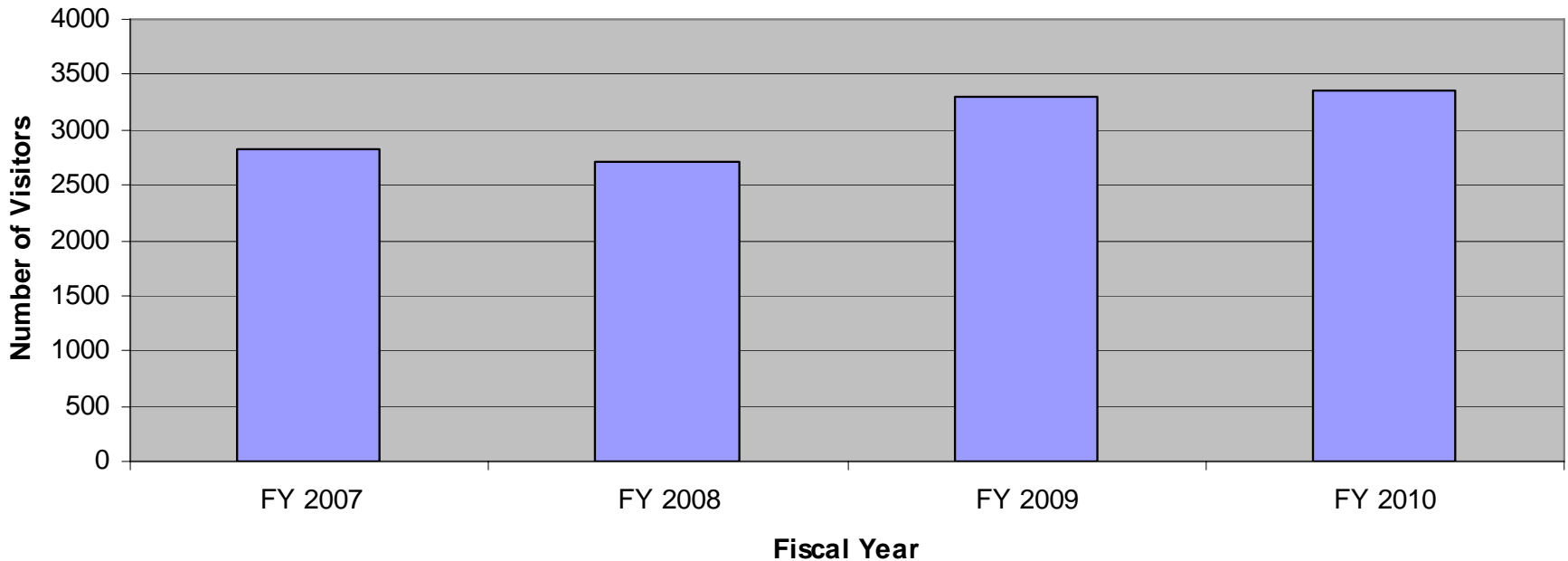
(River Concert Series, St. Mary's County Fair, St. Mary's County Oyster Festival, IHRA Nitro Jam (President's Cup Nationals), Bowles Farm Corn Maze, Forrest Hall Farm Corn Maze)



* Celebrate 375 campaign occurred during FY 2009.

Source: St. Mary's County Division of Tourism

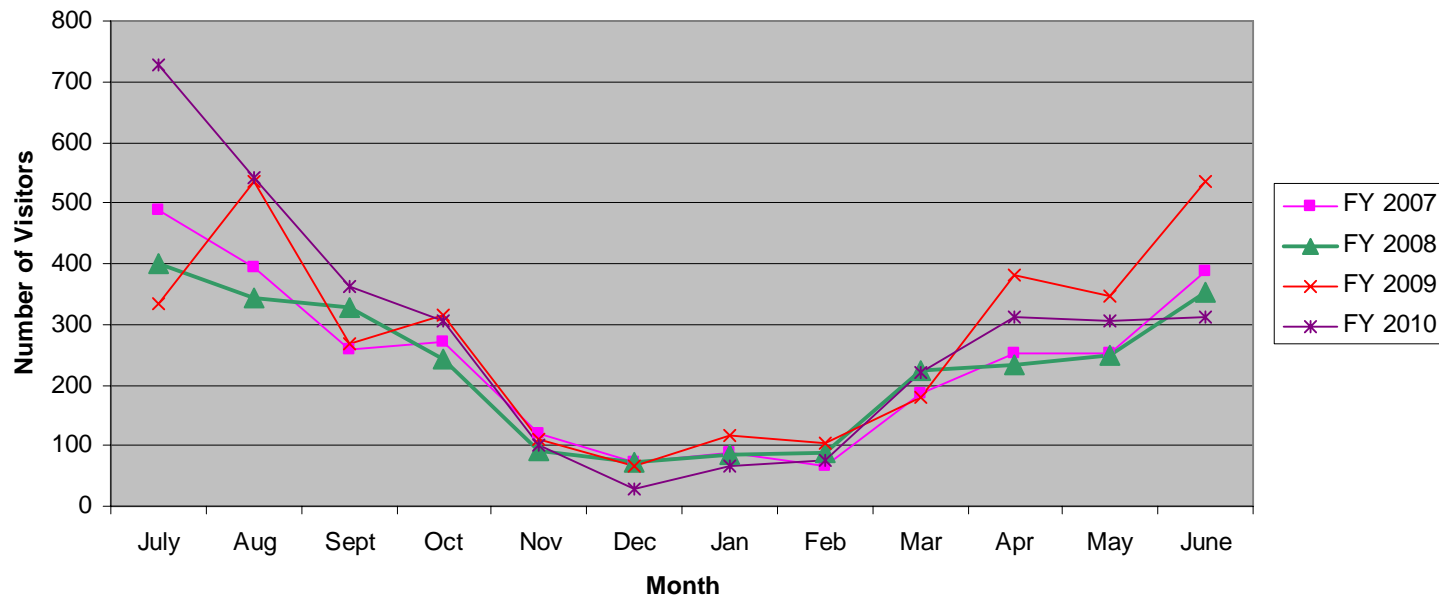
Visitors to St. Mary's County Welcome Center, FY 2007 – FY 2010



Source: St. Mary's County Welcome Center, Charlotte Hall.

*Welcome Center opened May 2006

St. Mary's County Welcome Center, FY 2007 – FY 2010



Fiscal Year	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
FY 2007	488	393	259	270	120	71	89	66	187	252	252	386	2833
FY 2008	401	344	326	242	92	72	86	87	224	232	248	352	2706
FY 2009	335	534	268	315	109	65	118	105	180	380	348	536	3293
FY 2010	728	541	361	306	102	28	67	75	220	312	304	311	3355

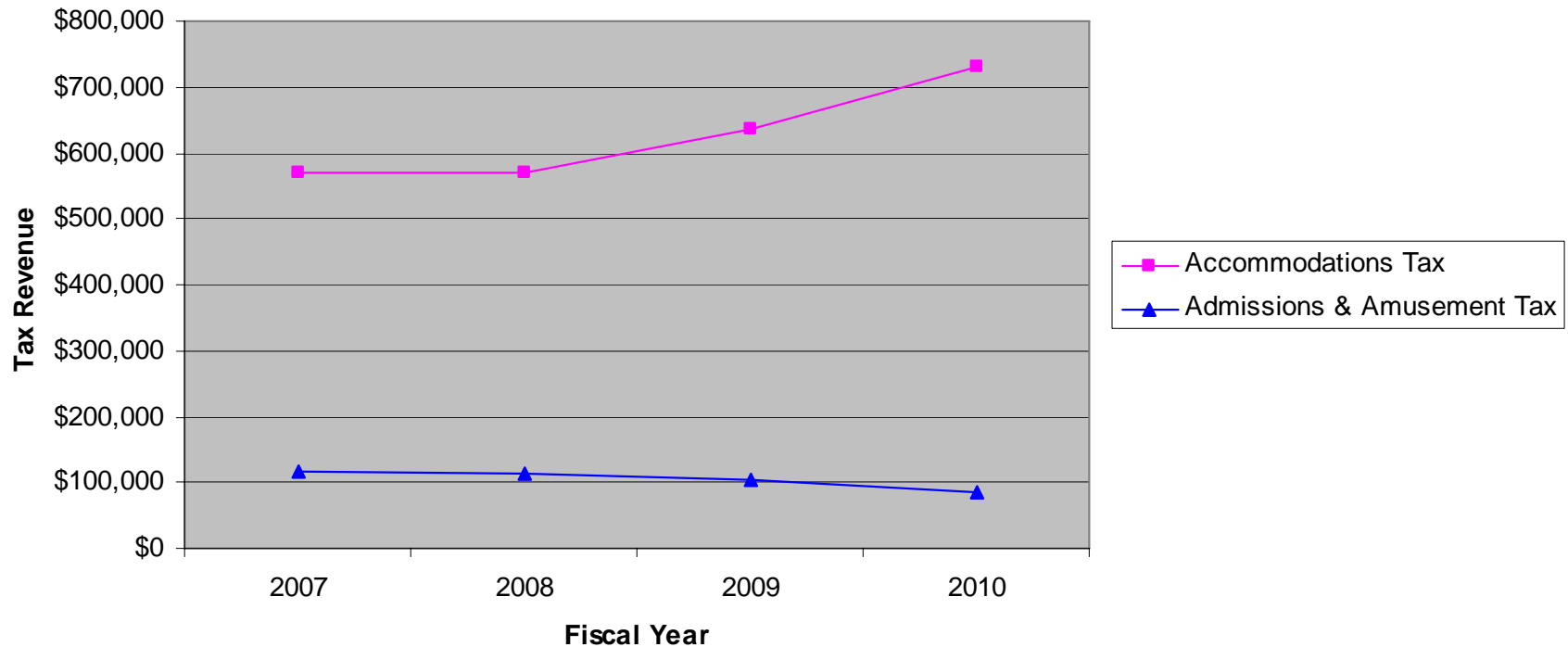
Source: St. Mary's County Welcome Center, Charlotte Hall.

*Welcome Center is open 7 days a week April – September. Open 3 days a week October – March

Tourism Taxes

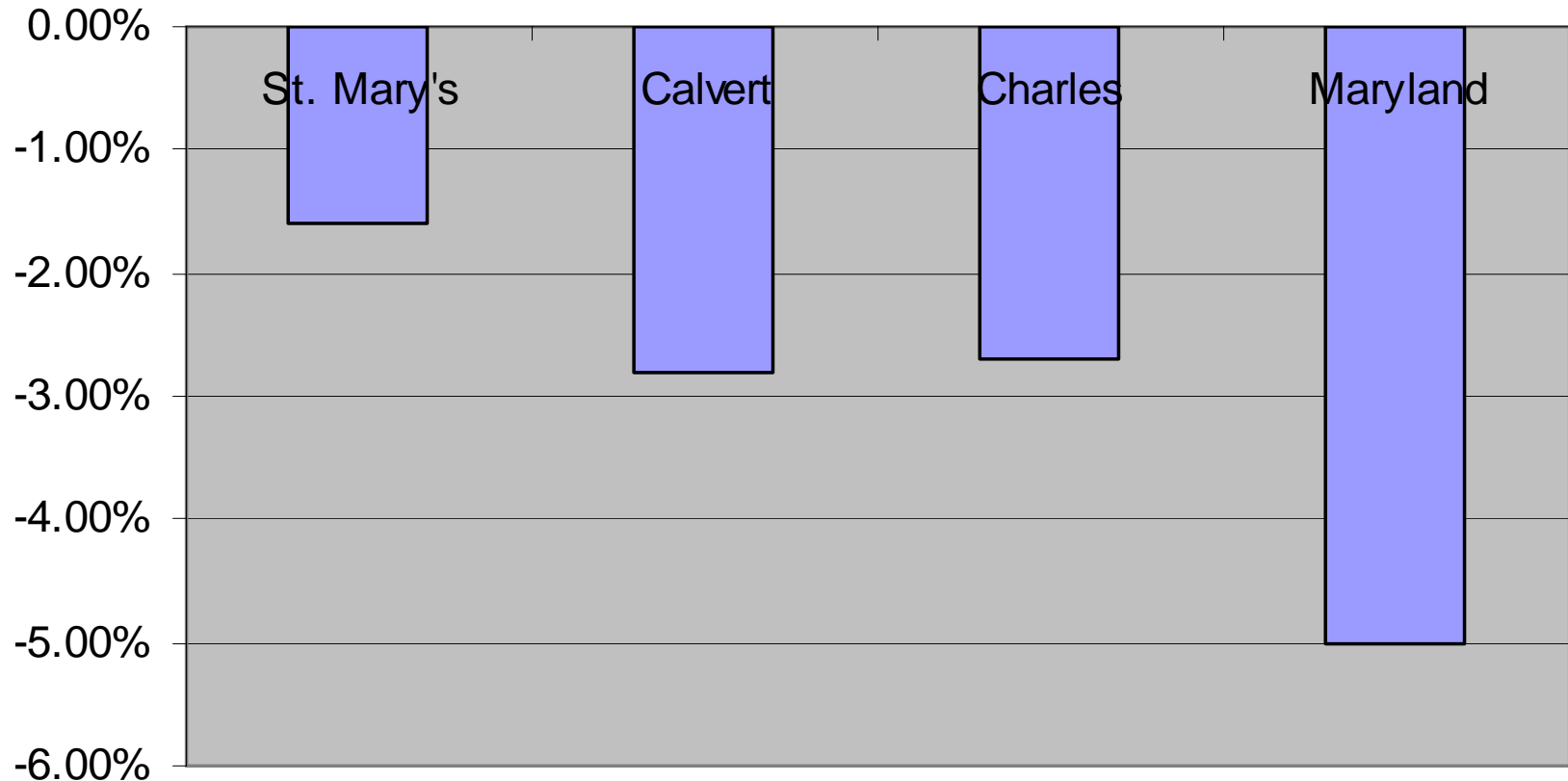
Accommodations Tax, Admissions & Amusement Tax

FY 2007 – FY 2010



Source: St. Mary's County Department of Finance.

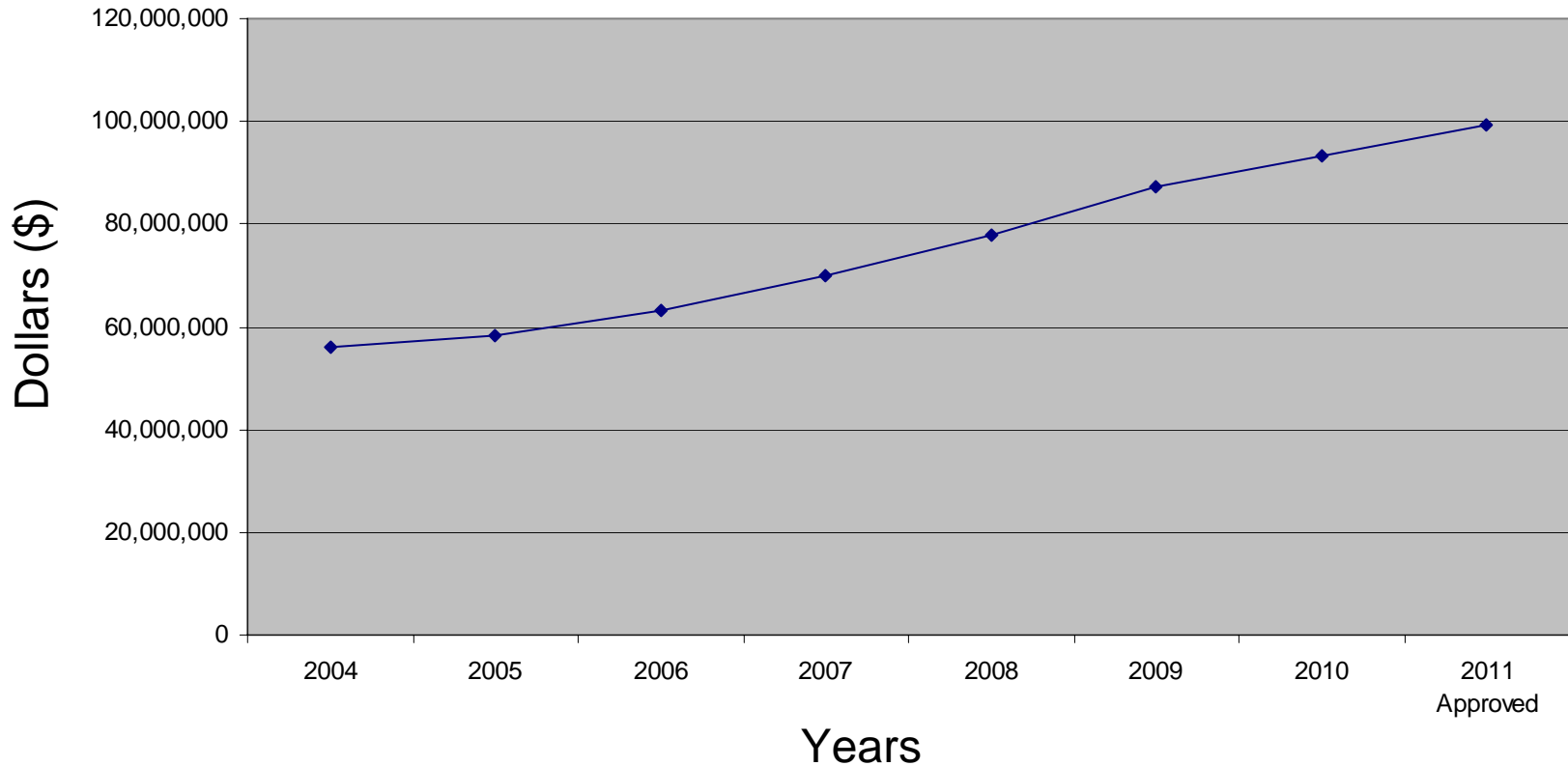
FY10 Tourism Sales Tax Revenue Percent Change



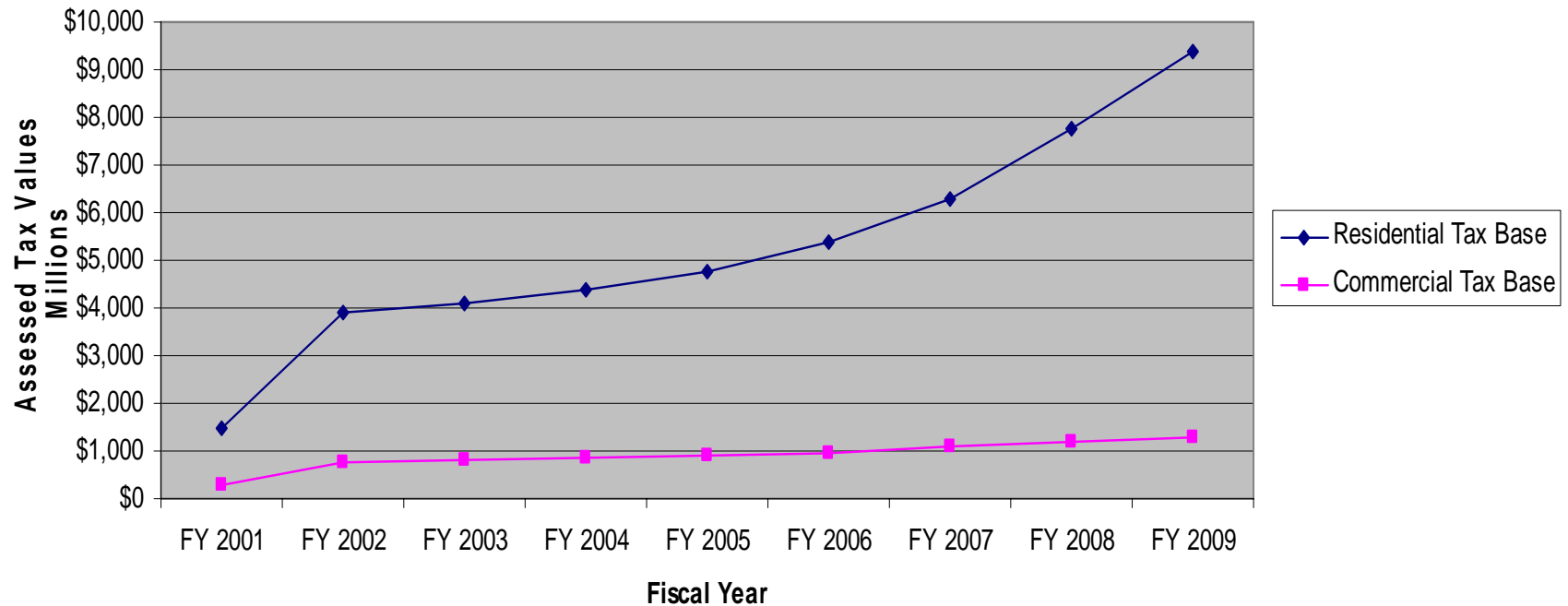
* Data from Audited DMO Expenditures and Incomplete FY2010 Tourism Taxes

Taxes

Total Property Tax Revenues for St. Mary's County



Real Property Tax Assessment Values for St. Mary's County – Residential vs. Commercial

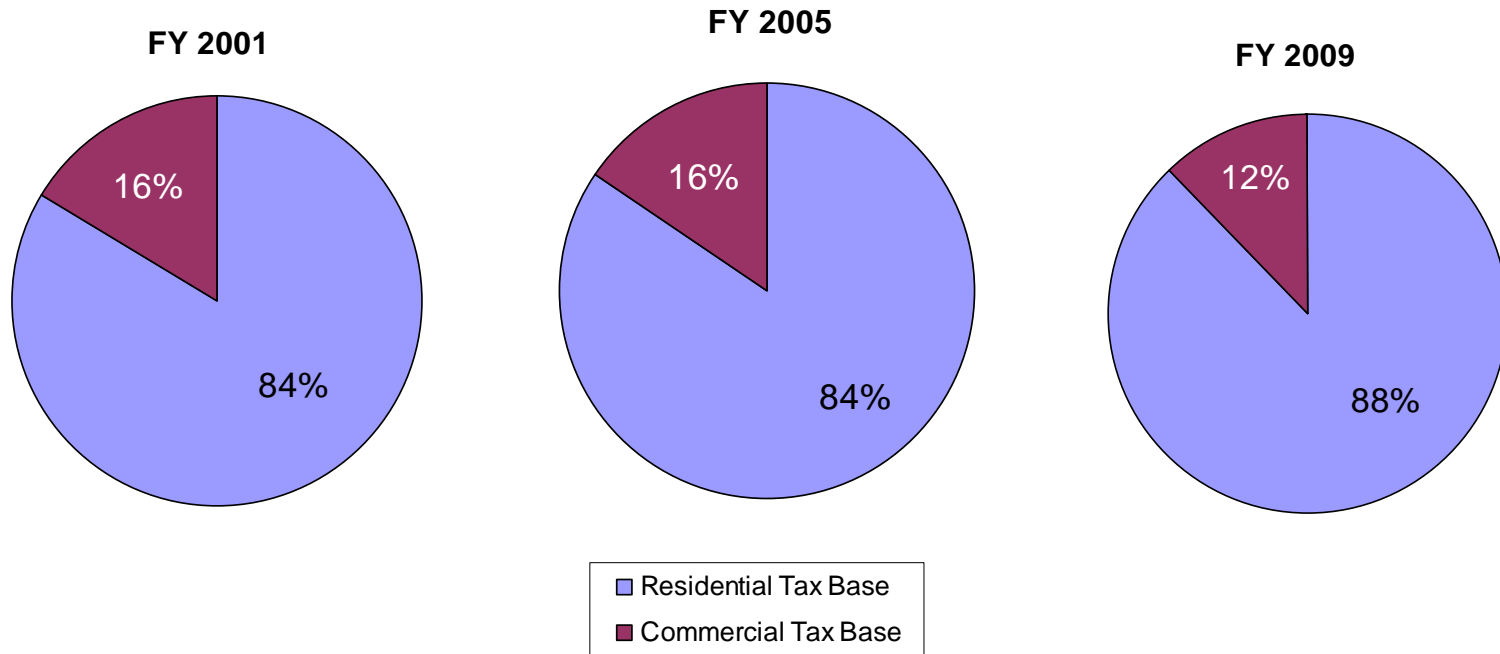


Source: Maryland Department of Assessments and Taxation, Annual Reports for Fiscal Years 2001 – 2009.

• This contrast is due to the presence of St. Mary's county's largest employer, the U.S. Navy. As a federal installation, this organization is not part of the county's commercial tax base.

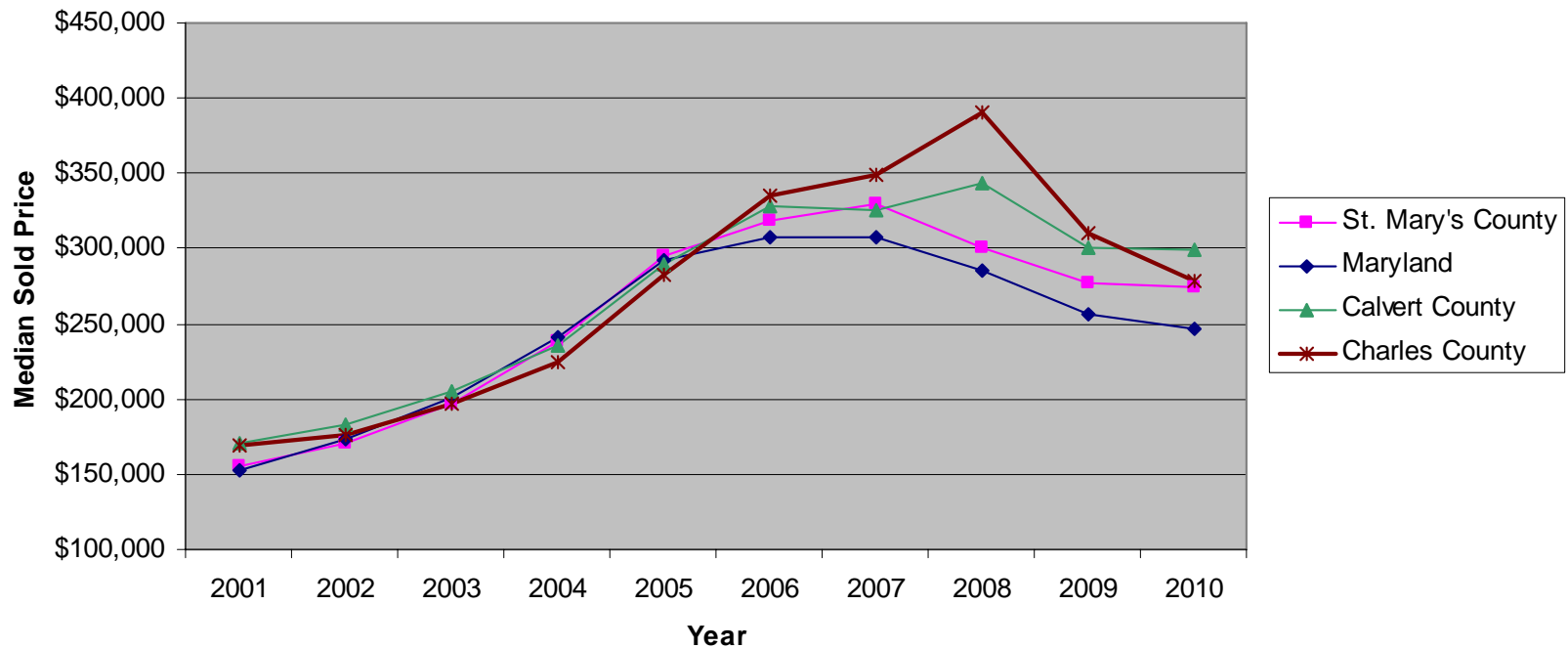
•* Real Property Tax Base – Residential vs. Commercial

Real Property Tax Base for St. Mary's County – Residential vs. Commercial



Source: Maryland Department of Assessments and Taxation, Annual Reports for Fiscal Year 2009.

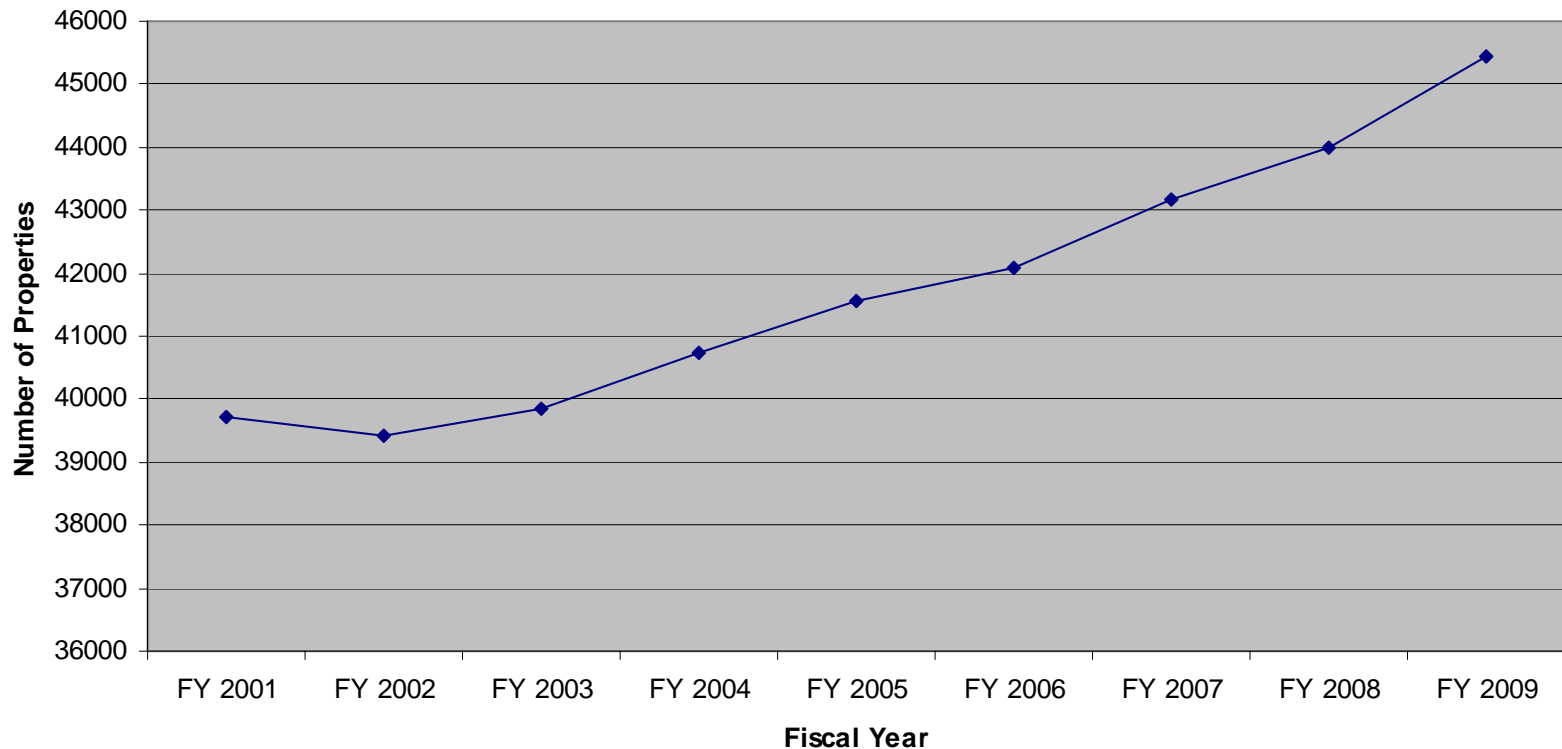
Median Market Value for Residential Property in St. Mary's County 2001 – 2010 (August 31, 2010)



*The graph does not start at zero to better demonstrate the data.

Source: Southern Maryland Association of Realtors, Sales Statistics for St. Mary's County

Number of Residential Properties, FY 2001 – FY 2009



*The graph does not start at zero to better demonstrate the data.

Source: Maryland Department of Assessments and Taxation, Annual Reports for Fiscal Years 2001 – 2009.