



Economic State of the County

Maryland's First County

Brief to the Board of County Commissioners

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Data Sources

- Federal: Decennial Census 2010, American Community Survey (ACS)
- State: DLLR, MDP, DBED
- Local: DECD Technology Handbook database, LUGM permits and GIS Mapping
- To come: Treasurer's Office, Assessable Tax Base



Outline

- State of the Economy
- New Data
 - Population
 - Income
 - Employment
 - Development
- Business Development
- Economic Diversification
- Q&A

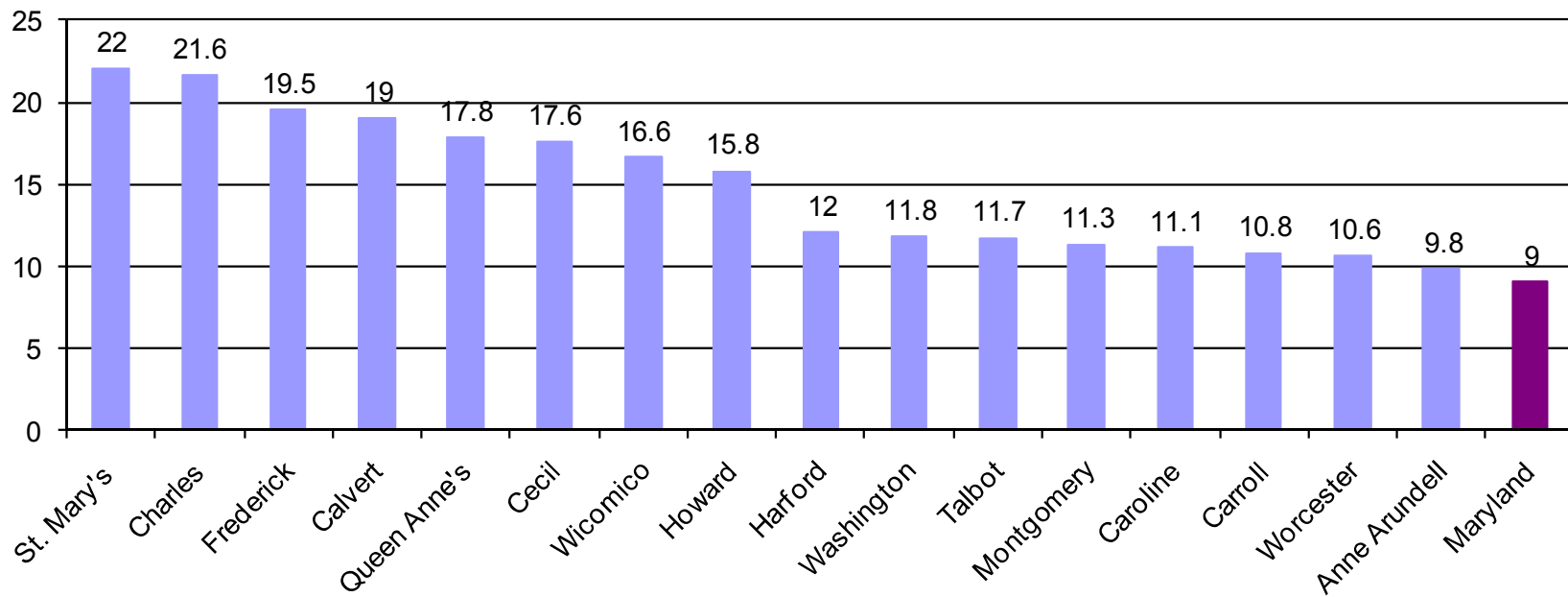


2011 Realities

- Bright Spots
 - Relatively strong economic indicators
 - Leonardtown leads county
- Continued Slow Economy
 - Local, national, global
 - High unemployment, tight lending, pervasive uncertainty
 - “Make do” sentiment at all levels, private and public
- Federal Budget Constraints
 - Slowdown in defense industry sector growth
 - Anticipate BRAC or BRAC-like review
- Lexington Park Development District
 - LPDD Master Plan Update well underway
 - Ripe opportunity for redevelopment



Population Growth in Maryland (2000–2010)



*Only Counties with growth higher than MD are shown. Counties not shown include Allegany, Baltimore, Dorchester, Garrett, Kent, Prince George's, and Somerset.



Growth in St. Mary's County

- 'Fastest Growing County in Maryland' last decade
- Population increase was 22%*
 - Increase of almost 19,000 people (2010 population 105,151) was largest increase in single decade in history (1940 population was <15,000)
 - Estimate at least 11,000 individuals moved into the County from elsewhere (nearly 3 of 5)
- Demographic includes:
 - Highest percentage of Veterans in Maryland
 - One of lowest Median Ages
 - Emerging population is increasingly Hispanic or 'Two or more races'

* 2000 Census 86,211 population was disputed.

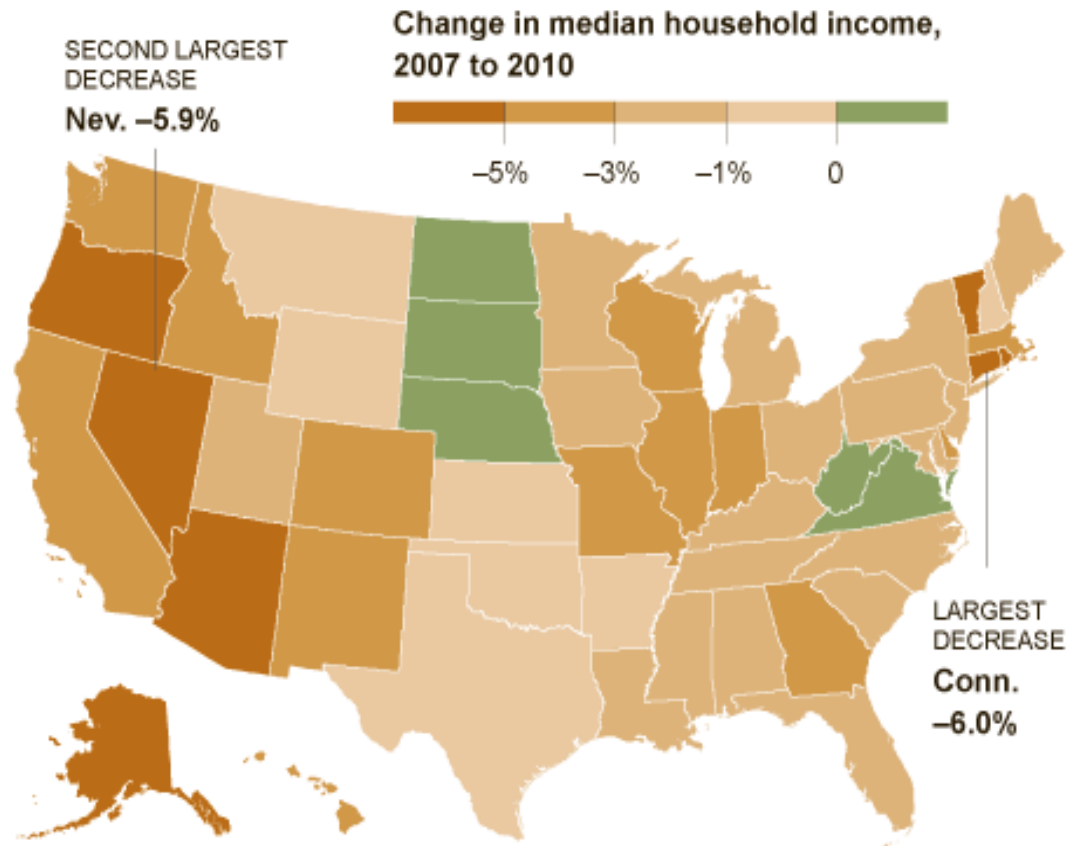


HOUSEHOLD INCOME

- “[In the U.S.] real median household income was \$49,445 in 2010, a 2.3% decline from 2009. Since 2007, median household income has declined 6.4% (from \$52,823) and is 7.1% below the median household income peak (\$53,252) that occurred in 1999.” (U.S. Census Bureau, “Income, Poverty, and Health Insurance Coverage in the United States: 2010,” September 2011)
- “In Maryland, the median household income dropped 3.2% to \$64,635 in the 2009-10 period, from a \$66,766 two-year average in 2007-08.” (“Middle class ‘Treading Water’,” The Gazette, September 16, 2011, p1)



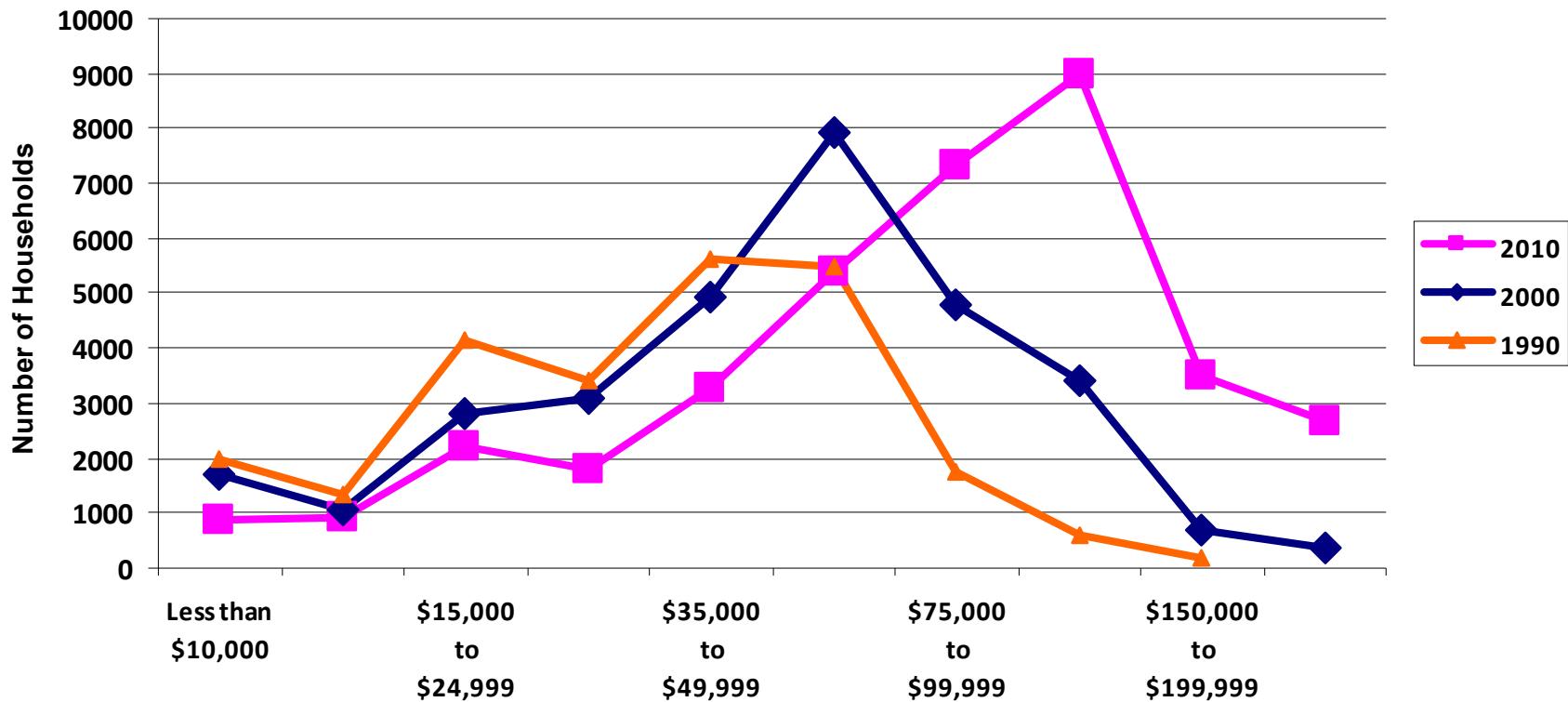
Median HH Income



	2010 Population	2007 Median Household Income	2010 Median Household Income	% Change
Monongalia, W. Va.	96,791	\$33,010	\$42,028	+27.3%
Muskogee, Okla.	71,110	\$32,377	\$39,910	+23.3%
Scioto, Ohio	79,506	\$30,152	\$36,859	+22.2
St. Mary's, Md.	105,786	\$73,663	\$88,444	+20.1
Nassau, Fla.	73,473	\$50,647	\$60,729	+19.9

Source: New York Times, Sep 22, 2011

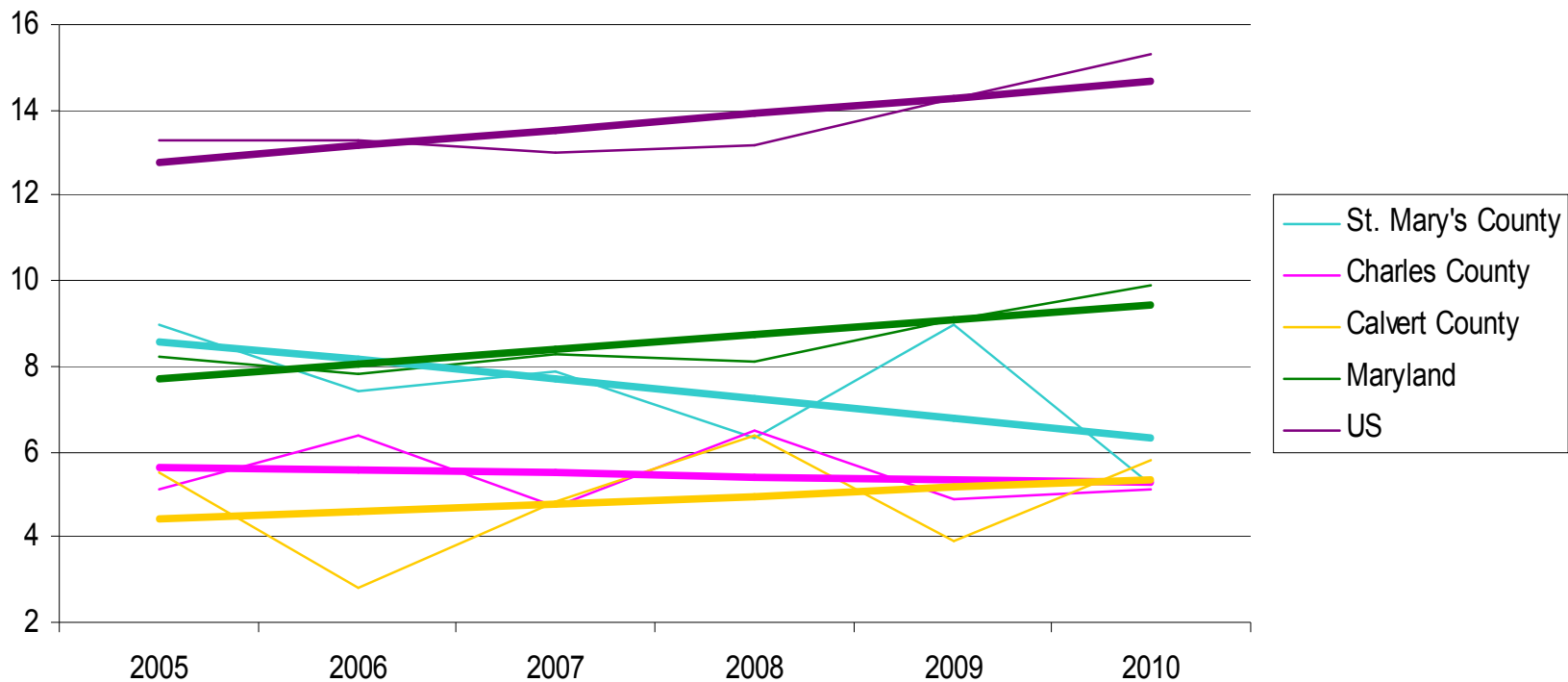
Median Household Income Distribution (1990, 2000, 2010)



Source: U.S. Census . Note that 1990 Census used \$150,00 and Above, rather than \$200,000 and Above



Poverty (2005–2010)



“The poverty rate in 2010 (15.1%) was the highest poverty rate since 1993... The number of people in poverty in 2010 (46.2 million) is the largest number in the 52 years for which poverty estimates have been published.” – U.S. Census Bureau, “Income, Poverty, and Health Insurance Coverage in the United States: 2010”



Average Weekly Wages

Tale of Two Economies

- At \$1,127 (\$58,605 annually), 2nd highest in state
 - Montgomery County leads at \$1,237 (\$64,324)
 - Neighbors Calvert \$798 (\$41,496), Charles \$764 (\$39,728)
 - St. Mary's fastest growing wages in Maryland since 2002
- Federal Gov't and Professional/Business Services represent 44% of workforce but **65% of wages**
 - Federal Government and Professional/Business Services combined average weekly wage: \$1,679 (\$87,308)
 - Fed Gov't \$1,892 (\$98,384), Prof/Bus Svs \$1,467 (\$76,284)
- All other industries avg wkly wage: \$764 (\$38,728)
- Weighted: Fed Gov't & Prof/Bus Svs: **\$1,661 (\$86,372)**
vs. All Other Industries: **\$715 (\$37,180)**

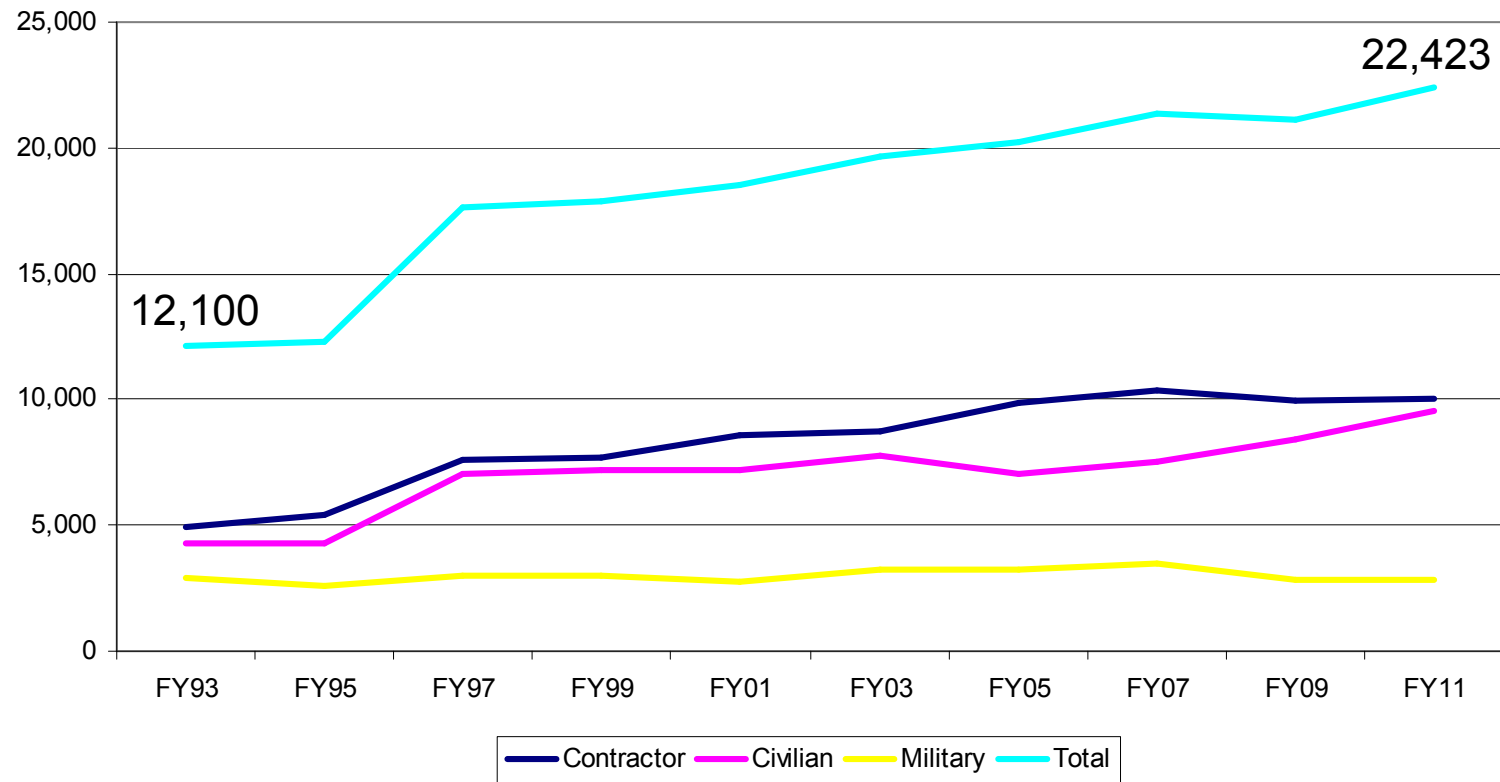


Technology Jobs

- Based on our Technology Handbook – number of jobs (self-reported) increase:
 - 2008 - 2009, -190 employees
 - 2009 - 2010, +885 employees
 - Increase between the 2009 and 2010 editions partially explained by DECD finding many new firms that were previously not listed.
 - 2010 - 2011, +289 employees
 - Expect reductions in 2012



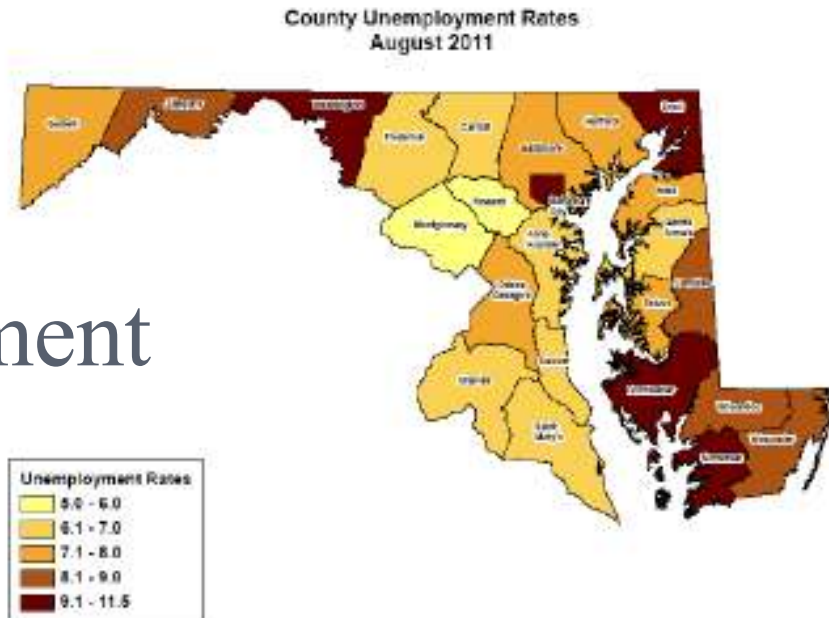
NAS Pax River Employment



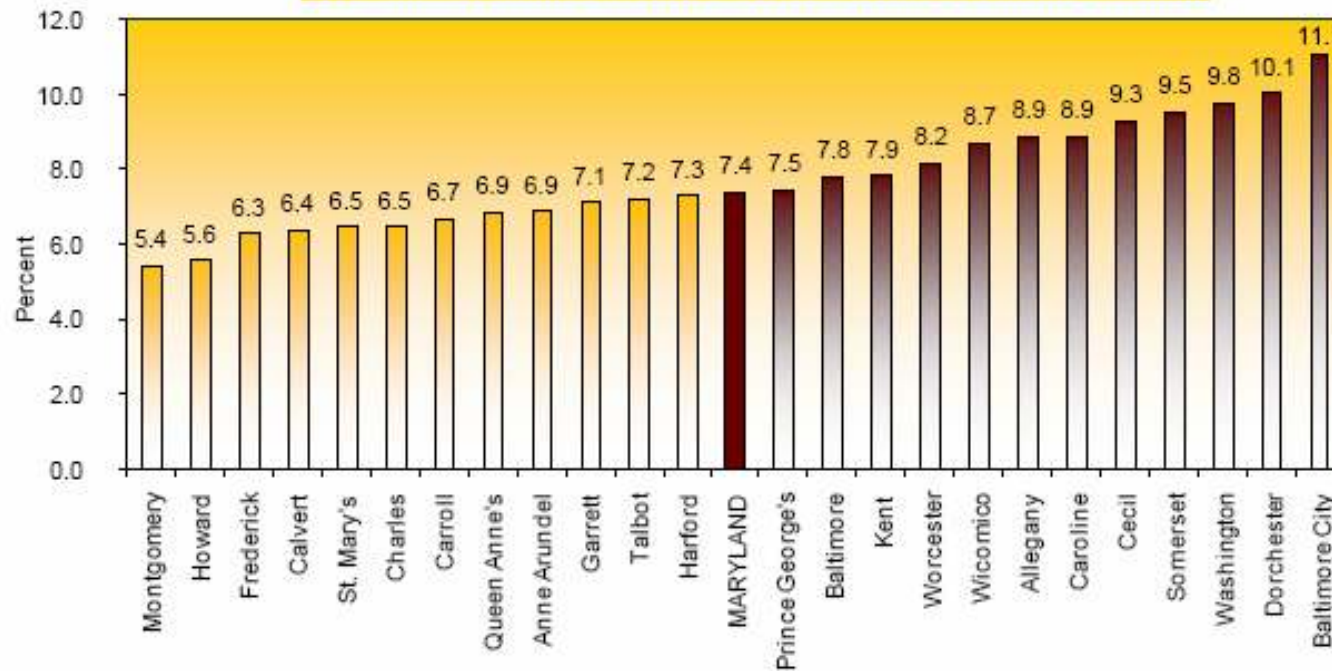
Source: NAS Patuxent River Manpower Loading Reports



Unemployment



Local Unemployment Ranking - August 2011 (not seasonally adjusted)

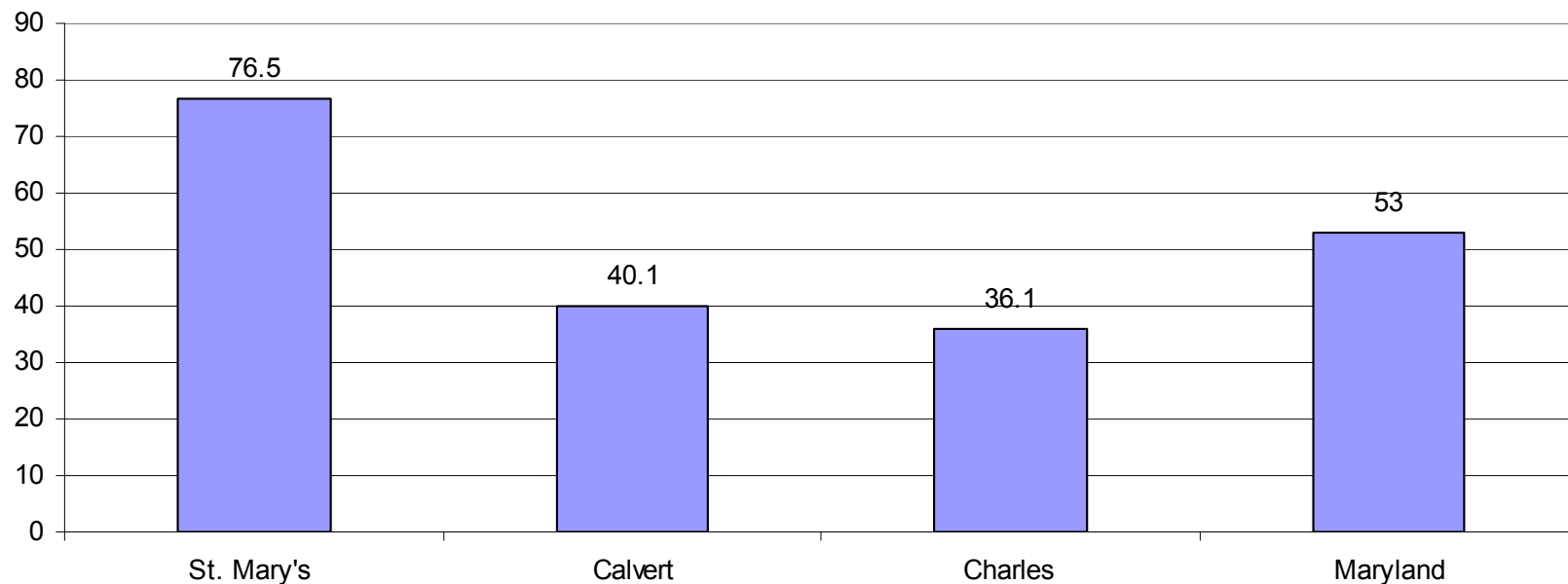


Source: MD DLLR Monthly Labor Review, August 2011



2010 Commuting Patterns in SoMD

St. Mary's In-Commute is Distinctive



76.5% of Workers in St. Mary's County also live in St. Mary's County (2010)

*53% of Maryland workers work in their home county



Permit Applications

August 24 – August 23

Quantity Processed	Year Processed	Percentage of Peak
2,717	2010-2011	70%
2,622	2009-2010	68%
2,630	2008-2009	68%
3,115	2007-2008	81%
3,617	2006-2007	94%
3,843	2005-2006	100% = Peak permit activity
3,625	2004-2005	94%
3,456	2003-2004	90%

*Information provided by the Department of Land Use and Growth Management



Approved Projects in 2011

January 2011

1. Airport View Drive Office Campus (California)
2. Friendly Tavern Complex (Great Mills)

February 2011

3. Primrose Park at Wildrose (California)
4. Texas Roadhouse (California)
5. Dreams Studio of Dance (Mechanicsville)

March 2011

6. Dicks Sporting Goods (Lexington Park)
7. Home Grown Farmers Market (Lexington Park)

April 2011

8. Margaret Brent Pump Station (Helen)
9. Ship Point Machine Paint Room (Hollywood)

May 2011

10. Park and Sell (Mechanicsville)
11. Israel Fisher Mining (Mechanicsville)
12. Fit Is It, Jazzercise (Mechanicsville)

June 2011

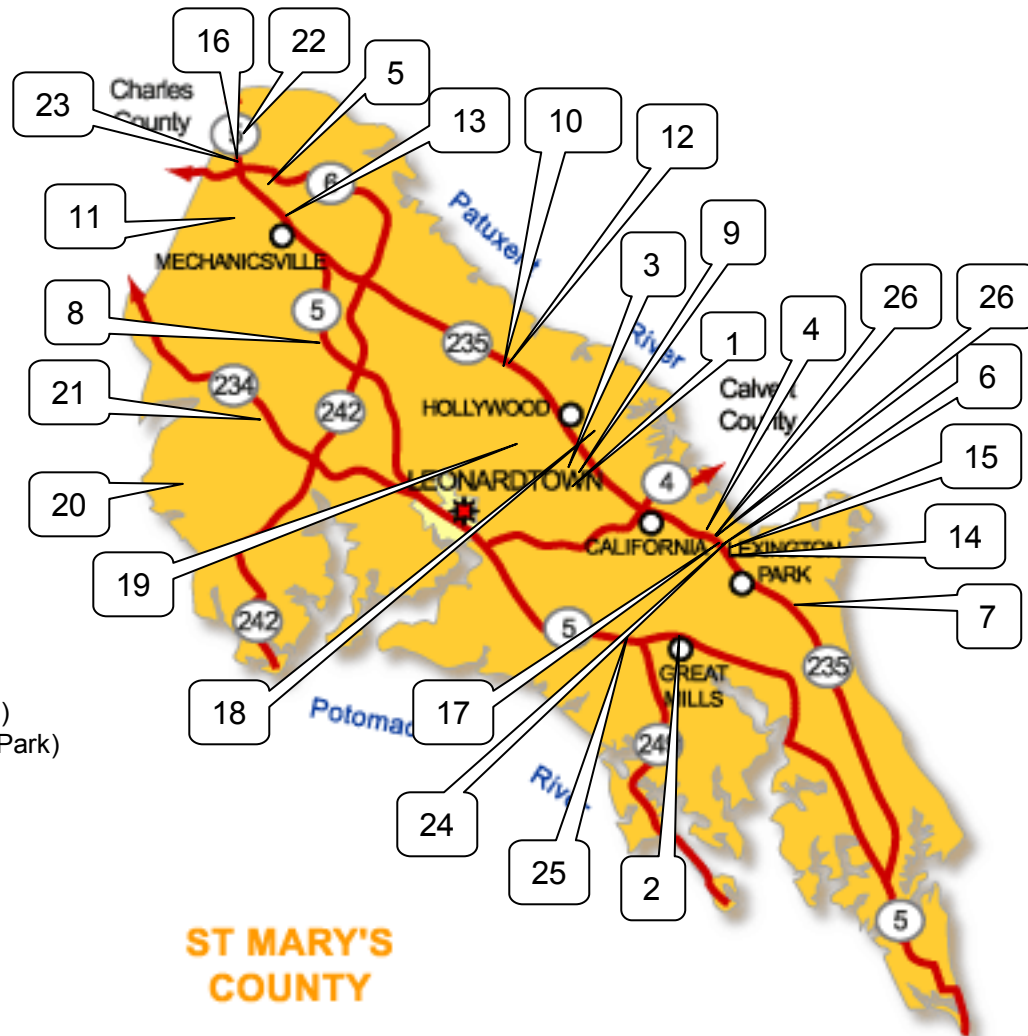
13. Brisco-Tonic Funeral Home (Mechanicsville)
14. Daugherty Office Bldg (Lexington Park)
15. Buffalo Wild Wings (Lexington Park)
16. WaWa Mount Wolf (Diesel Tank) (Charlotte Hall)
17. WaWa Rue Purchase (Diesel Tank) (Lexington Park)
18. Hollywood Take Out (Hollywood)

July 2011

19. Brick House Farm (Hollywood)
20. Shuhart Subdivision (Chaptico)
21. Woodmark Subdivision (Clements)

August 2011

22. Dunkin Donuts (Charlotte Hall)
23. Charlotte Hall Scrap Metal (Charlotte Hall)
24. Esperanza Center Addition (Lexington Park)
25. Oriental Market (Great Mills)
26. Jerry's Carry-out (Lexington Park)
27. Wa-Wa (Diesel Pump) (Lexington Park)



**ST MARY'S
COUNTY**

*Information provided by the Department of Land Use and Growth Management

Business Development

- Continued partnership through established groups:
 - Chamber, Patuxent Partnership, Navy Alliance
 - Business Associations: LBA, Lex Park, IBA, St. Mary's Square, South County, etc.
 - County Gov't: Procurement, CDC, EDC
 - eMaryland Marketplace Workshop
 - Small Business Development Center
 - Women's Business Roundtable
 - NAVAIR Office of Small Business
 - Small Business Simplified Acquisition
 - Naval Aviation Small Business Roundtable
- Electronic Marketing, Social Media, Outreach
- Workforce Development through Secondary and Higher Education partners



Growth in Leonardtown (Municipality)

(2000–2010)

- Total population increased nearly 55%
 - Increased by 1034; from 1,896 (2000) to 2930 (2010)
- Median Age decreased nearly 8%
 - From 44.2 (2000) to 40.8 (2010)
- Median Household Income increased nearly 72%
 - From \$35,562 (2000) to \$61,146 (2010)
- Owner-occupied housing increased from 52.3% to 56.7% of all housing



St. Mary's County Industrial Park

Case Study

- In LPDD Development District
- Total Companies - 48
- Total Employees - 1223
- Aerospace & Defense Related Employees - 538 (44%)
- Defense Companies - 7 (14% of companies in the Industrial Park)



Can this be replicated elsewhere in core of Lexington Park?



Strategy and Tactics

○ Job Growth

- Natural growth of existing defense economy, unmanned systems and irregular warfare
- New growth through diversification in Tourism, Tech Transfer, Rapid Prototype/Light Mfg, Agriproduction
- Homegrow workforce through STEM, Forrest Ctr, etc

○ Need for small businesses to assist in/lead diversification (won't come from large org's)

○ Stimulate Redevelopment in Lexington Park

- LPDD Master Plan Update provides template
- Target Economic Incentives to help realize Plan
 - Leverage county policies, assets, and tools: Taxation, Zoning, County Property, CIP, Fund Balance, Permit Process, Procurement, Public/Private Partnerships

