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Shaping the Economic Future of Charles County 2.0: Refresh and Recalibrate

November 5, 2019

Prepared for:

Charles

CHARLES COUNTY, MARYLAND

CLOSE TO THE CAPITAL. FAR FROM ORDINARY.

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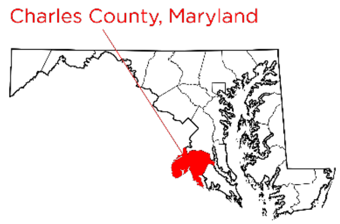
Chapter 1: Executive Summary



The Charles County (Maryland) Economic Development Department (EDD) retained Garner Economics, LLC to take a fresh look at the organization's 2016 Strategic Plan. In the fall of 2015, Garner Economics was engaged by the EDD to conduct a comprehensive assessment of the County's economic development competitiveness and its economic development service delivery. The resulting work created an economic development action plan that serves as a road map to strengthen the County's attractiveness to global companies and to help the EDD and its economic development partners better market the area for potential investment.

The plan—***A Proactive Approach to Shaping the Economic Future of Charles County, Maryland***—was published in early 2016 and offered observations, conclusions, and recommendations on what the County and the EDD need to do to enhance the area's economic vitality.

The EDD and some of its stakeholders are pleased with the progress the organization has made in marketing to and engaging with companies to attract, retain, and expand investment in the County. However, the EDD also recognizes that work in some areas could be enhanced. The EDD also wanted to get external feedback on the results of implementing the 2016 plan, both in terms of the organizational changes made and its economic development results.

Building on Success

The goal of this refresh, ***Shaping the Economic Future of Charles County: 2.0***, is to take an objective look at the County's and EDD's success to date (a report card), understand what factors have driven the progress, and identify areas that still need attention if the County is to ensure that the area is a place where the world's most innovative companies and talent want to locate and live. The process followed to recalibrate the strategy is illustrated in Figure 1.1 below.

Figure 1.1: Project Phases

Economic Assessment	
Assess the current state of the Charles County economy	Reassess the industry sector targets

Program Assessment
Determine the implementation status of the 2016 recommendations

Recommendations	
Recalibrate plan to address gaps in the County's plan that need to be addressed	Execute strategies to continue to guide the EDD efforts to engage with economic development partners by refining marketing and operational efforts

Within the original strategy for Charles County, Garner Economics recommended ways for the EDD to leverage the County's central location and access to the D.C. MSA to attract high-quality companies and talent and find more resources to devote to its economic development service delivery.

In the nearly four years that have transpired since adopting the strategy, the EDD has taken the charge to heart, strengthening the organization and better accomplishing its mission of lead generation and facilitating investment and job creation. Of the 18 recommendations offered in the plan, only two have not been started. The other 16 recommendations are either "in process" or "completed/ongoing."

Analysis and Assessments

The Garner Economics team approached this refresh and assessment of the progress made in the County with the same analytical and data-driven rigor as the original strategy.

In August 2019, Garner Economics undertook an *Assets & Challenges Assessment* of the County. This was an on-site tour of the County's economic development assets to compare its product against a pre-determined list of investment factors. The evaluation was taken from a site-selection perspective and sought to measure improvement from 2015. Garner Economics assessed the area based on the qualities, elements, and infrastructure that a business will examine when evaluating a location as a place for its operations or as an investment.

In both the original engagement and for the refresh, the *Assets & Challenges Assessment* served as both an objective and subjective evaluation of the area. The assessment allowed the team to document progress made since the original plan in strengthening the County's assets, as well as to note continued challenges that exist in the community and act as potential barriers for successful targeted business recruitment.

The *Assessment* informed the work to reflect on the success and continued challenges of the originally identified target business sectors and the team's recommendations to refine those targets.

Additionally, Garner Economics surveyed the County's economic development stakeholders for their perspectives of the progress in implementing the strategy. The survey sought feedback on both the EDD's activity and the County's business climate as a whole. Chapter 2 summarizes the responses to the survey.

Last, Garner Economics assessed Charles County's economic position and competitiveness compared to the 2015 analysis. The comparative assessment was made to gauge the level of changes in the County in regard to economic, business, and talent indicators. For sake of comparison to the 2016 work, the *Assessment* compares Charles County to Frederick County, Maryland; Howard County, Maryland; the Washington Metro; the state of Maryland, and the nation—the same benchmarks used in 2016.

Target Business Sectors

The optimal business sector targets presented in Chapter 3 provide the rationale for updated/verified and new business sector targets for Charles County. Together, the updated/verified targets and the new targets will help Charles County continue to grow and diversify its economic base as well as continue to work to mitigate identified and ongoing challenges. These targets are best fits for Charles County based on the current economic and business climate conditions. The targets are recommended given the County's attributes, assets, proximity to other economic drivers, and progress toward overall goals (Figure 1.2).

Figure 1.2: Target Business Sectors

Updated and New Targets
Federal Contracting
Tech & Professional Services
Entrepreneurship & Experiential Retail
Value added agribusiness
Health Services

Recommendations

In conducting this analysis, the Garner Economics team found that Charles County has evolved into an effective, economic development organization, accomplishing its mission of facilitating investment and job creation. The County and EDD continue to face challenges, however, including fundamental items that comprise a community's business climate such as the local regulatory environment and the availability of product (sites and buildings). Additionally, the County has more work to do in creating and encouraging the development of suitable product to attract and retain investment and a skilled workforce.

Chapter 5 offers a set of implementable recommendations that will help the EDD continue this trajectory of progress and better focus its efforts to attract high-quality companies and talent. The recommendations address those activities that are for countywide efforts and those that are specific to the EDD.

Figure 1.3: Recommendations Summary

1. No Product—No Project™: Continue to advocate for product development 2. Create a one-stop permitting office to streamline the permitting process and create an internal culture of "yes" 3. Being proactive and strategic to attract FDI
EDD Centric
1. Transfer the tourism functions from the Department of Recreation, Parks, and Tourism (RPT) to the EDD 2. Rebrand the name of the Charles County Economic Development Department and of the title of the department head 3. Add full time positions for business retention and expansion (BRE), and business attraction

Chapter 2: Survey Results

To gauge stakeholders' perceptions on the impact of the 2016 strategy on economic development efforts in Charles County and the EDD's success in implementing the recommendations, Garner Economics developed a survey to solicit input on perceptions of the County's current business climate and opportunities and continued challenges.

The survey was built given observations during the 2015–2016 work, as well as input from the Economic Development Department's Board of Advisors and the EDD staff.

The survey was open August 20–29, 2019 and was completed by 104 people. Fewer stakeholders completed the survey in 2019 versus 2015. For the original engagement, 510 people responded. A smaller percentage of the current survey respondents live in Charles County.

Key Themes

The comments below summarize the key themes emerging from input garnered from the electronic survey. Appendix A provides more detail on the survey responses discussions. Appendix B provides the responses from the survey instrument used in 2016 for the original engagement.

Note: The comments below are summarized from multiple choice survey options and open-ended text responses. ***The responses are reported as they were offered; they may not necessarily be statements of fact but may be opinions or perceptions.***

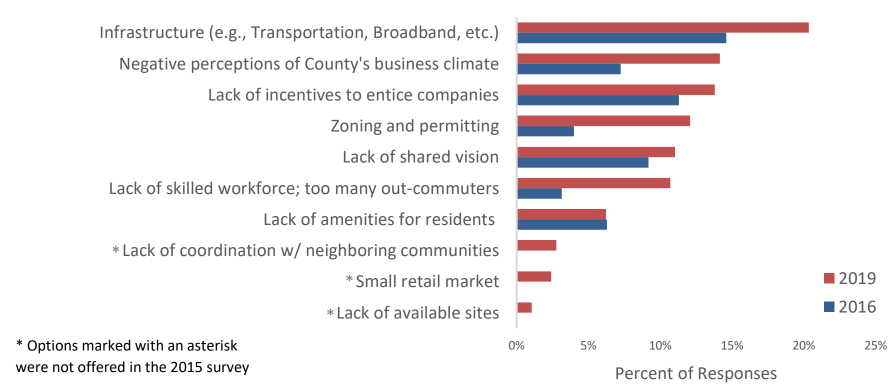
County's Weaknesses in Attracting Businesses

When asked to choose among options that represent a variety of obstacles that most inhibit Charles County's ability to attract, expand, or retain businesses and investment, the state of the County's infrastructure (including transportation and broadband) was the most frequently cited option, followed by negative perceptions of the County's business climate, the lack of incentives to entice companies, the County's zoning and permitting regulations, the lack of a shared vision for the County's economic future, and the lack of a skilled workforce.

The sentiments were echoed when respondents were asked for their thoughts on things businesses desire but that cannot be found in the County. Respondents noted the lack of mass transit or strong transportation infrastructure most frequently, followed by a lack of quality of place amenities for millennials/younger workforce, and the lack of a qualified and available workforce.

The sentiments were also somewhat aligned to responses provided in 2015 during the original engagement.

FIGURE 2.1: OBSTACLES INHIBITING INVESTMENT IN CHARLES COUNTY



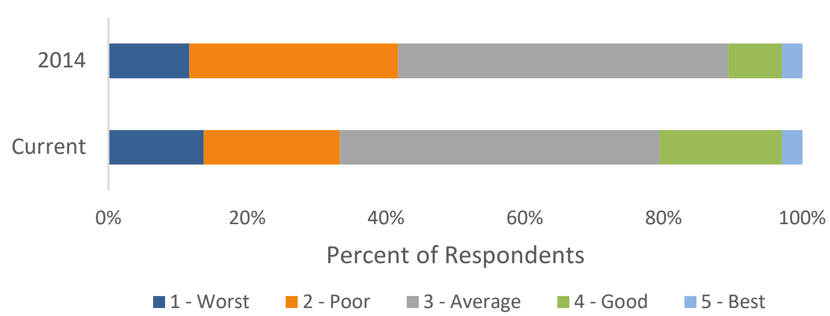
While the negative perception of the County's business climate, the County's onerous zoning and permitting process, and the lack of a skilled workforce were noted as concerns by respondents in 2015, a larger percentage of respondents to the current survey noted these as top inhibitors—suggesting that, among those responding, these shortcomings are deemed a greater inhibitor than in the past.

Business Climate

The survey asked respondents whether they believe the business climate in Charles County is better currently than it was five years ago (in 2014) and, in a separate question, whether the current group of County Commissioners appears more or less business friendly in their policies than in 2016.

Respondents of the survey believe that the business climate has improved over the past five years, with 20.5% ranking the County's business climate either "good" or among the "best." This compares to 10.7% of respondents ranking the business climate in 2015 either "good" or among the "best."

FIGURE 2.2: PERCEPTION OF CHARLES COUNTY BUSINESS CLIMATE



The majority of respondents to the current survey believe the County Commissioners have adopted policies that are either more friendly to the County's business climate or that have maintained the County's business climate in the last five years. Only 15% believe the County Commissioners are less friendly to the County's business climate. Despite this positive sentiment, the current survey respondents still feel that the County's business climate is a hindrance in efforts to attract new businesses and maintain current ones.

Target Industries

In the 2016 plan, Garner Economics recommended four business sector targets for Charles County's recruitment efforts based on the assets in the County that would help it differentiate itself. The business sector targets were: **Federal Contracting & High Value Professional/Business Services; Health Services; Entrepreneurial & Retail Development; and R&D, Engineering and Computing**. The EDD relabeled these targets as noted on their website to: Federal Contracting, Business Services, Health Services, Retail Development, and Technology.

Survey respondents were asked whether they believe the targets (as renamed by the EDD) are still appropriate for Charles County. With the exception of retail development, the large majority of survey respondents believed the other four targets are still appropriate for Charles County. When queried on the applicability of retail development for the County, 65% of respondents believe it is still a good fit; however, nearly a third do not believe so.

Respondents were also invited to offer suggestions for other sectors that would be a good fit. Respondents listed Industrial/Manufacturing (light, heavy, distribution); Agriculture; Entertainment/Sports; High-End Retail; and Hotel and Lodging/Tourism most often.

Progress Since Embarking on Strategy

The survey tried to ascertain respondents' perceptions of the impact of the 2016 strategy in two ways:

- Whether respondents think the economy is better in Charles County today than it was in 2016, and
- Whether respondents think the Charles County Economic Development Department is doing an effective job in working to enhance the economic vitality of Charles County.

To the first question, a slight majority (53%) believe that the economy is ***not*** better today than it was prior to the launch of the strategy. Conversely, only 42% believe that the EDD is doing an effective job in working to enhance the economic vitality of the County.

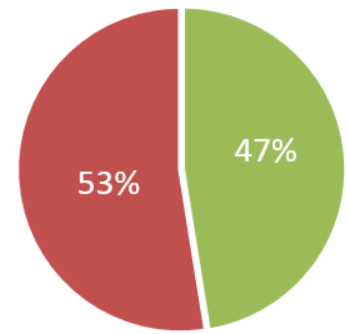
Overall Sentiment on Economic Development in the County

Respondents were mixed in their assessment of the current state of economic development in the County. To survey questions allowing open-text answers, some respondents expressed frustration with the County and its economic development efforts, citing that initiatives seem to cater more to individuals' (i.e., County Commissioners or County staff) priorities rather than to a shared vision for the County. Other respondents expressed frustration at the slow pace in addressing infrastructure and product issues.

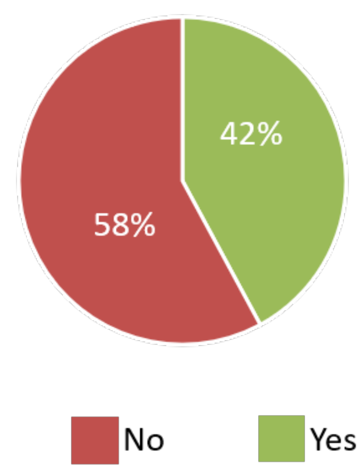
Conversely, some participants expressed appreciation for the efforts of the County in working to address product issues and being more strategic in their marketing efforts. Still others note the difficult task at hand and remarked on the positive momentum they have witnessed.

FIGURE 2.3: PERCEPTIONS OF CHARLES COUNTY'S ECONOMY

Do you think the economy is better in Charles County today than it was in 2016?



Do you think the Charles County Economic Development Department is doing an effective job in working to enhance the economic vitality of Charles County?

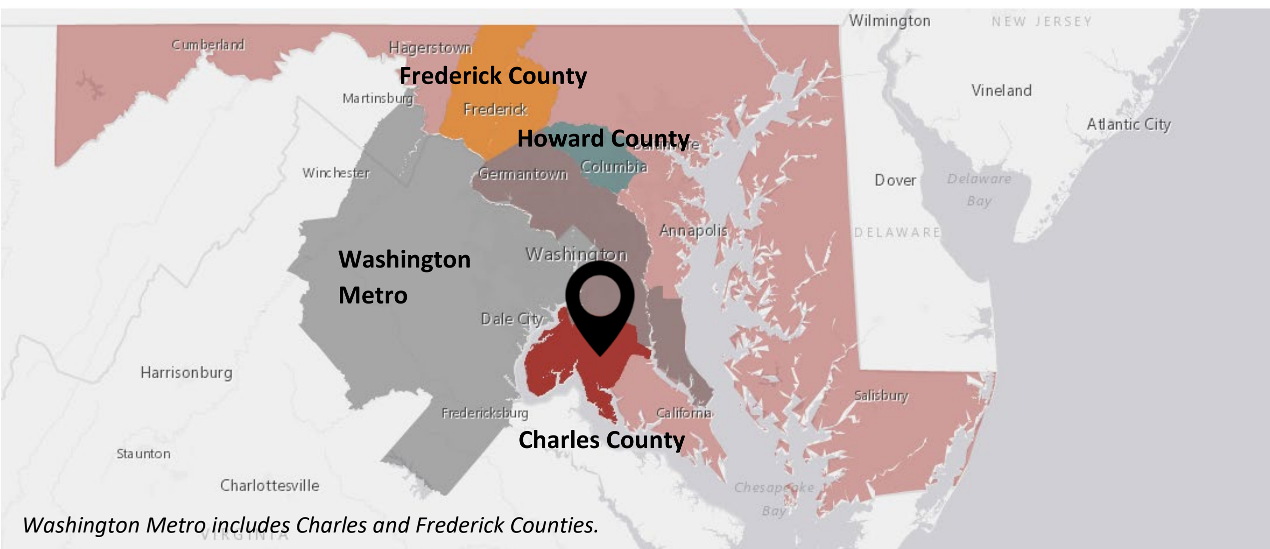


Chapter 3: Dashboard Indicators Summary

The following analysis examines the economic position and competitiveness of Charles County located in southern Maryland on the Potomac River. The County is part of the Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area (Washington Metro). For this report, Charles County is used wherever possible for analysis with a few data points only available at the regional or city level.

For context, this report compares Charles County to itself over time—specifically comparing metrics in the Garner Economics COMPETITIVE REALITIES REPORT published in 2016. Comparisons are to ascertain changes in the County's economic, business and talent indicators. Additionally, Charles County is compared to Frederick County, Maryland; Howard County, Maryland; the Washington Metro; the state of Maryland, and the nation for benchmarking. These benchmarks have remained the same from the 2016 analysis for consistent comparison.

This analysis relies heavily on raw, objective data collected by governmental or impartial third-party agencies. In all cases, the original and most currently available data for all geographies (as of September 2019) is used. Garner Economics conducted all unique calculations and computations from the original data. Sources of data are noted, and detailed methodology and source information are available upon request.



Washington Metro includes Charles and Frederick Counties.

Measurements

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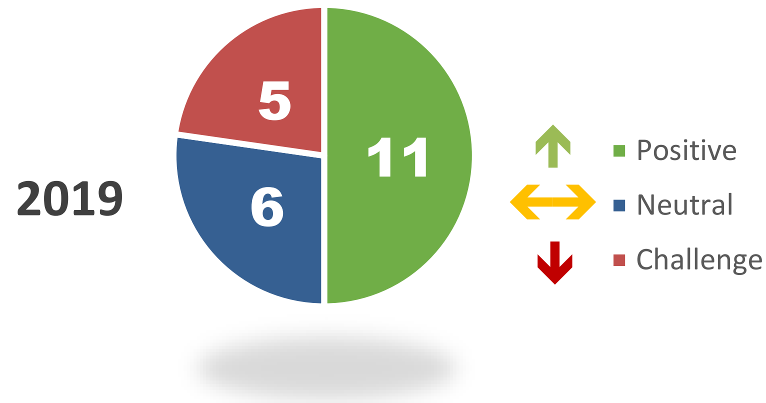
Charles County Demographic & Economic Comparison



Demographic & Community Indicators

Measure	2014	2015 Rating	2018	2019 Rating	Notes
Population Change	11.7% 10-year change	↑	12% 10-year change	↑	Charles County, Maryland, has grown by 17,720 (12%) over the past decade and 8,854 (5.8%) over the past five years. For growth in the past decade, Charles County ranks in the middle of benchmarks behind the Washington Metro (15.7%) and Howard County (15.5%). For growth in the past 5 years, Charles County is on par with the Washington Metro and benchmark Maryland counties which range from 5% to 6% population increases.
Median Age	38.4 years	↔	38.2 years 0.5% younger	↑	Median age for Charles County falls in the middle of benchmarks—younger than Frederick County, Howard County, and the state. The Washington Metro has the youngest median age (37.1 years). Charles County has the same median age as the national median and has grown younger by 0.5% over the past four years.

Demographic & Community Indicators *(continued)*

Measure	2014	2015 Rating	2018	2019 Rating	Notes
Age Distribution	54.5% 25–64-year-olds	↑	54.7% 25–64-year-olds .2% increase	↑	Charles County showed a slight increase in population ages 25–64 years old between 2014 and 2018. This set of working-age population in the county is second only to the Washington Metro in 2018. The County also had more 20–29-year-olds than in 2014. All benchmark counties show the trend toward an older population in the age range of 40–59 years old compared to the Washington Metro.
New Residents	9,765 New Residents	↓	8,256 New Residents	↓	More than 8,200 new residents were estimated to have moved to Charles County one year earlier at the time of survey. The County had the lowest number of new residents amongst benchmark geographies, implying slower growth.
Educational Attainment	61.7% Some College or Higher Credentials	↔	64% Some College or Higher Credentials 2.3% Increase	↔	In 2018, an overwhelming 94.4% of the County's population were High School Graduates or higher and 64% of residents had Some College education or higher compared to 61.7% just four years earlier. Although well educated, Charles County falls behind benchmarks in higher education with only the national educational attainment at lower levels.
Secondary School Performance	92.4% Grad Rate	↔	93.5% Grad Rate 1.1% Increase	↔	The graduation rate for Charles County has increased by 1.1% between 2015 and 2018. This rate of 93.5% is the highest among all geographies. When factoring in standardized test results, Charles County's ACT and SAT scores are consistently below all benchmarks.
Median Household Income	$88,803	↑	$94,368	↔	Charles County has the highest percentage of those making $25,000 to $49,999; however, it also had the lowest percentage of individuals making $24,999 or under, half of the national rate.

Demographic & Community Indicators *(continued)*

Measure	2014	2015 Rating	2018	2019 Rating	Notes
Average Individual Earnings	$67,400	↑	$71,665 6.3% Increase	↑	Charles County's average individual earnings have increased by 6.3% since 2014. The County's growth rate falls behind other benchmarks and the 2018 average earnings are the second lowest. Considering income distribution, Charles County has 22.4% earning more than $100,000 and has the highest percentage of individuals earning $75,000 to $99,999.
Per Capita Income	$35,978	⇔	$38,848 8% Increase	⇔	Per capita income in Charles County was higher than the nation but well behind the Washington Metro, Howard, and Frederick Counties. Per capita income increased by 8% from 2014 to 2018.
Poverty	6% / 8% Poverty/Under 18	↑	5.7% / 7.4% Poverty/Under 18 Decline .3%/.6%	↑	Charles County has the lowest percentage of its population below the poverty level with the exception of national levels. The County has the second-lowest poverty rate for Children Under 18 Below Poverty compared to benchmarks except for the United States. Both poverty rates have fallen between 2014 and 2018.
Crime Rate	2326	⇔	1953 16% Decrease	↑	Charles County has a total crime rate below the Washington Metro, state and the nation. In 2018, 1,953 incidents were reported per 100,000 residents in Charles County. Crime reported has decreased by 16% between 2014 and 2018.
Cost of Living	111.9	⇔	120	⇔	Charles County has a relatively lower composite Cost-of-Living Index and is on par with other benchmarks. Frederick, Maryland, ranks a few points below Waldorf, Maryland—used for measuring Charles County. The County's Cost-of-Living Index, like its suburban neighbors, is significantly lower than the Washington DC Cost-of-Living Index.

Labor Market Analysis & Employment Trends

Measure	2014	2015 Rating	2018	2019 Rating	Notes
Labor Force	80,072 2014 Labor Force 2.6% 4-year growth		85,104 2018 Labor Force 6% 4-year growth		The labor force for Charles County has steadily grown with a 6% increase between 2014 and 2018. This growth rate is the highest among benchmarks. The size of the labor market is comparatively smaller than the benchmarks with a 2018 annual average labor force of 85,104.
Labor Force Participation	68%		67.2% 0.8% Decrease		Charles County has a labor participation rate of 67.2%, which is above the national rate but below all other benchmarks. The County experienced a decrease of 0.8% in its participation rate while Frederick and Howard Counties fell 1.9% and 1.2%.
Labor Draw	1,507,102 45-min. drive-time		1,600,805 45-min. drive-time		A 45-minute drive-time analysis reveals a broad reach to 1.6 million people and an active workforce of more than 900,000 strong.
Commuting Patterns	20,042 2014 net outflow		24,564 2017 net outflow		In Charles County, several different sources show that a majority of working residents leave the County for their jobs and this number is growing. The net outflow of commuter traffic employed at private enterprises has increased by 24% from 2014 to 2017. U.S. Census data shows more than 50,000 workers out-commute. This number can also be potential workers for new and expanding firms looking for educated and skilled talent.
Average Commute	44.2 minutes		45.4 minutes 2.7% Increase		The average commute time for Charles County residents is significantly higher than the other benchmarks. The 2018 average 45.4-minute commute has increased by more than a minute, or 2.7%, from 2014.

Labor Market Analysis & Employment Trends *(continued)*

Measure	2014	2015 Rating	2018	2019 Rating	Notes
Employment Change	5-Year Growth: 1,775 Jobs 4.4% Increase	↑	5-Year Growth: 649 Jobs 1.6% Increase	↓	Charles County experienced modest growth in the past five years with a net of 649 jobs, increasing 1.6%. The previous five years showed an increase of 1,775 jobs and a 4.4% growth rate.
Average Wage	$42,524	↓	$46,280 8.8%	↑	In 2018, the estimated average annual wage per job in Charles County equaled $46,280, an 8.8% increase from 2014. This wage is below other benchmarks but increased at a rate higher than Frederick County.
Startups	988 New Firm Employment	↔	1,140 New Firm Employment 13% Increase	↑	Charles County shows a 13% increase in workers employed at new firms, less than one-year-old, between 2014 and 2018. The County is below new firm employment levels of all other benchmarks.
Self-Employment	6.8% Self-Employed	↓	5.8% Self-Employed 1% Decrease	↓	Approximately 5.8% of workers in Charles County were Self-Employed in 2018. The proportion is significantly below the state, the nation, the Washington Metro, and the benchmarks. Charles County also saw the highest rate of decline among benchmarks, decreasing 1%.
Broadband	90% Population has access 14 Mbps Avg. Speed	↔	92% Population has access 70 Mbps Avg. Speed	↑	Charles County still has good access to broadband, increasing from 90% to 92% of households having at least one provider of high-speed internet. The average speed in Waldorf, Maryland, is 70 Mbps which is a vast improvement over 14 Mbps. Charles County is on par with other benchmarks in Maryland.

<table>
<tr><th colspan="2">Local Specialization, Competitiveness & Growth</th></tr>
<tr><td>Major Industry Sector Change</td><td>✓ Overall, Charles County shows a net increase of 649 jobs taking into consideration covered employment.
✓ The largest absolute industry job gains in Charles County between 2013 and 2018 came from Health & Social Assistance, increasing 447 jobs, followed by Construction (+392) and Administrative & Support, Waste Management & Remediation Services (+270).
✓ A handful of sectors were excluded due to nondisclosure of data including Agriculture, Oil & Gas, Utilities, and Wholesale Trade.
✓ Losses were experienced in Retail Trade (-687) and Professional, Scientific & Technical Services (-338).</td></tr>
<tr><td>Industry Earnings</td><td>✓ Overall, the average earnings per job in Charles County of $46,280 are 19% below the national average of $57,266.
✓ Earnings in the County are below national averages for all major employment sectors except Government, by 18.8% and Construction, by 1.6%.
✓ Arts, Entertainment & Recreation and Information sectors were significantly lower than the national average, by 65.3% and 46.6% respectively.
✓ A handful of sectors were excluded due to nondisclosure of data including Agriculture, Oil & Gas, Utilities, and Wholesale Trade.</td></tr>
<tr><td>Major Occupational Change</td><td>✓ Jobs in Computer and Mathematical Occupations saw the most growth over the last five years, increasing by 1,840 in the Southern Maryland Workforce Region, the smallest region available for this data. The Southern Maryland Workforce Region consists of Calvert, Charles, and St. Mary’s Counties.
✓ Strong job gains were in the categories of:
o Computer and Mathematical (+1,840)
o Food Preparation and Serving Related (+ 1,070);
o Building and Grounds Cleaning and Maintenance (+ 940)
o Architecture and Engineering (+ 890)
o Education, Training, and Library (+ 650)
✓ Several categories experienced job losses, but Office and Administrative Support occupations had the largest loss of 2,120 jobs. Other occupational categories with sizable job losses include Production (-700) and Management (-230).</td></tr>
</table>

Local Specialization, Competitiveness & Growth *(continued)*	
Occupational Earnings	✓ Overall, the annual average wage for the Southern Maryland Workforce Region was $54,347 compared to the United States' annual average wage of $51,960. This is 4.4% higher than the national level. ✓ Comparison to national average annual earnings revealed that a little over half of the pay levels are higher than national averages. ✓ Occupations paying significantly higher than national rates in 2018 included: • *Farming, Fishing, and Forestry* (27.9%) • *Architecture and Engineering* (18.9%) • *Business and Financial Operations* (18.4%) • *Installation, Maintenance, and Repair* (15.8%) • *Production* (14.3%) • *Life, Physical, and Social Science* (13.6%) • *Protective Service* (12.8%) ✓ *Sales and Related* occupations in Southern Maryland pay 26% under national levels and *Legal* occupations are 32.6% under national averages.
Major Industry Sector Specialization & Growth	✓ Five industry sectors have a local specialization at one or above and experienced job growth in the past five years in Charles County. These comprise the *Competitive* category and are: ○ *Construction* (LQ 1.9) ○ *Government* (LQ 2.1) ○ *Educational Services* (LQ 1.5) ○ *Other Services* (LQ 1.2) ○ *Accommodation & Food Services* (LQ 1.3) ✓ Industries with local specialization below one but had job growth within the County over the past five years places them in the *Emerging* category. These include *Health Care & Social Assistance; Administrative, Support, Waste Management & Remediation*; *Transportation & Warehousing; Management of Companies*; *Manufacturing* and *Arts, Entertainment & Recreation.*

Local Specialization, Competitiveness & Growth *(continued)*	
Major Industry Sector Specialization & Growth	✓ The At-Risk category includes industry sectors that had job growth and an LQ higher than 1. Only Retail Trade with a job loss of 687 and LQ of 1.7 lands in this category. ✓ The remaining four sectors that had data available are classified as *Declining* due to job loss and low local specialization.
Major Occupational Sector Specialization and Growth	✓ Seven occupational groups have location quotients at 1 or more and experienced some employment growth recently, and are considered *Competitive*: • *Computer and Mathematical* (LQ 1.7) • *Food Preparation and Serving Related* (LQ 1.1) • *Architecture and Engineering* (LQ 3.3) • *Education, Training, and Library* (LQ 1.8) • *Installation, Maintenance, and Repair* (LQ 1.4) • *Business and Financial Operations* (LQ 1.2) • *Construction and Extraction* (LQ 1.0) ✓ Eight occupational categories saw employment gains over the past five years but have concentrations (LQs) under 1. These *Emerging* sectors are: • *Building, Grounds Cleaning, and Maintenance* • *Healthcare Support* • *Healthcare Practitioners and Technical* • *Personal Care and Service* • *Transportation and Material Moving* • *Community and Social Service* • *Protective Service* • *Arts, Design, Entertainment, Sports, and Media* ✓ There were no occupational groups considered *At-Risk* and six categories were considered *Declining* or having employment loss/no change, along with local specialization under 1.

Chapter 4: Demographic & Community Trends

This chapter focuses on the residents of Charles County, Maryland, exploring population demographics, new residents, educational attainment, and secondary school performance. Income for households and individuals, per capita income, and poverty rates are key indicators of residents' economic standing and are assessed. Also included in this chapter are several indicators affecting residents' quality of life and opportunity, such as crime rates and cost of living.

Population Trends

Population growth can be a significant factor in local economic health and is often a key consideration in business expansion and site selection decisions. Population declines, very slow growth rates, or significant domestic out-migration causes companies to be wary of an area, favoring those locations that are dynamic and growing.

Charles County has seen steady population growth in the past decade growing a total of 12% since 2008 (Table 4.1, Figure 4.1). This growth rate places Charles County behind in the middle of benchmarks Washington Metro (15.7%) and Howard County (15.5%) but well ahead of the state and nation. When we focus on growth within the last five years, Charles County grew by 8,854 (5.8%), which is a rate near to Frederick County (6%) and just behind Howard County's 6.5% growth (Figure 4.2).

The annual growth rate for the past decade is at 1.2%, which lags slightly behind Howard County and the Washington Metro, both at 1.5%. Frederick County saw 1.1% growth while Maryland and the United States grew less than 1% each.

Table 4.1
Net Population Change
Highest Growth Rate Shaded

Geography	2018	Change 2008–2013	% Change 2008–2013	Change 2013–2018	% Change 2013–2018	% Change 2008–2018	Annual Growth Rate 2008–2018
Charles County	161,503	8,866	6.2%	8,854	5.8%	12.0%	1.2%
Frederick County	255,648	11,857	5.2%	14,505	6.0%	11.2%	1.1%
Howard County	323,196	25,178	9.0%	19,613	6.5%	15.5%	1.5%
Washington Metro	6,249,950	573,015	10.7%	298,999	5.0%	15.7%	1.5%
Maryland	6,042,718	238,739	4.2%	119,014	2.0%	6.2%	0.6%
United States	327,167,434	11,963,761	3.9%	11,109,707	3.5%	7.4%	0.7%

Source: U.S. Census Bureau Population Estimates, Garner Economics

Figure 4.1
Population Growth in Charles County

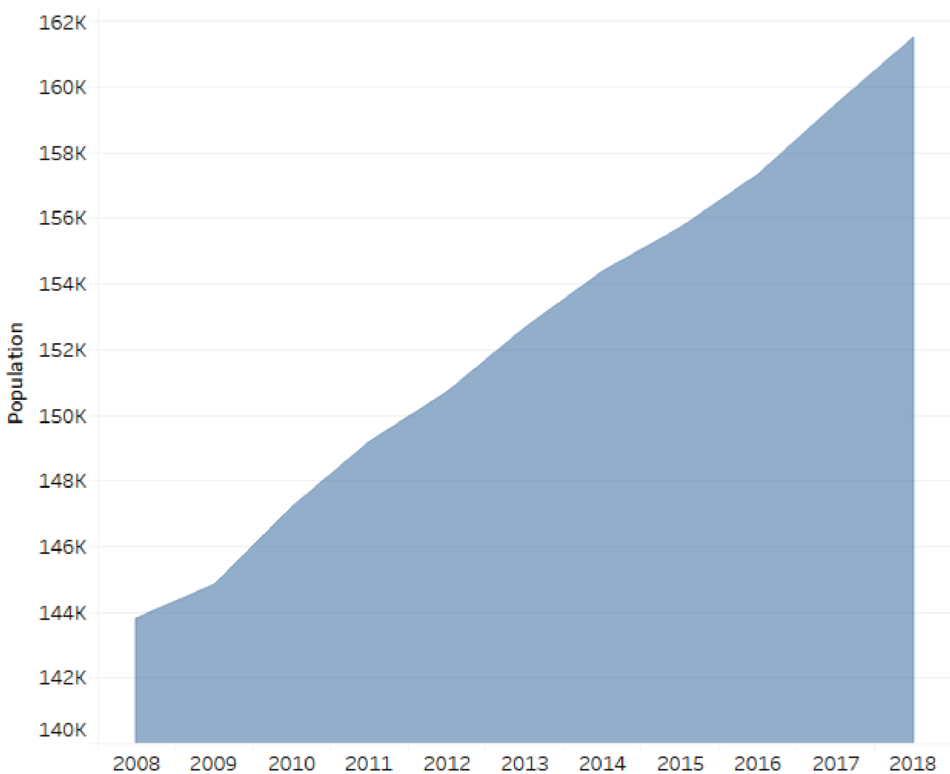
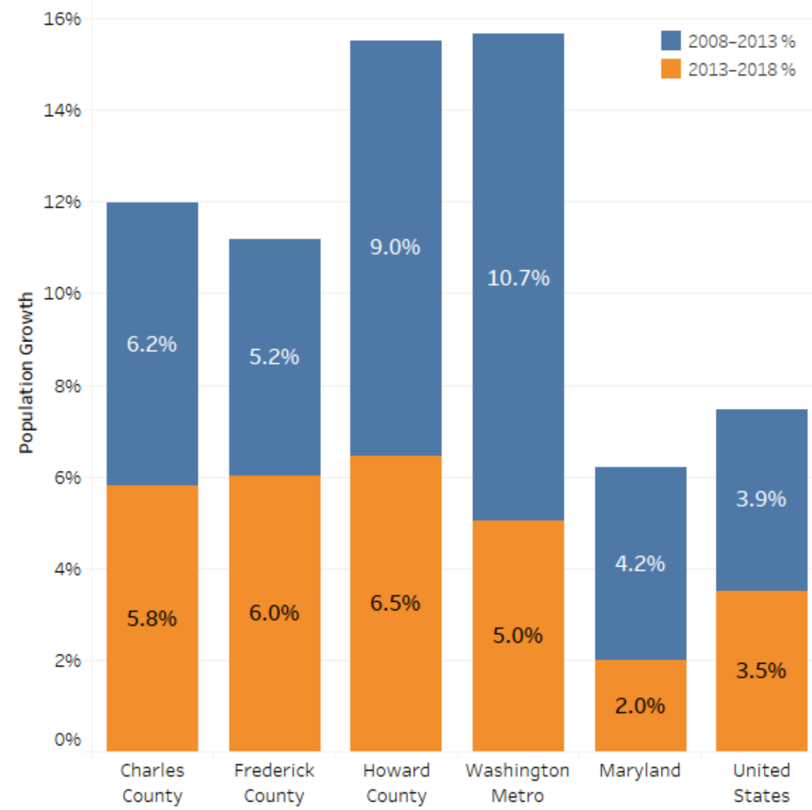


Figure 4.2
Population Growth 2008–2018



Source: U.S. Census Bureau Population Estimates, Garner Economics

Age

The age composition of a local population can be an important determinant in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-age workers may prevent firms from initiating expansions requiring quick startup operations. A high proportion of older workers may indicate certain incumbent skills or the need to replace soon-to-retire workers. With the current focus on retaining and attracting talent, an existing pool of younger people for both current and future workforce participation is essential in making a community attractive for companies and people alike.

The median age of Charles County is 38.2, which is the same median age nationally and younger than all benchmarks except the Washington Metro (Figure 4.3). The median age of the County has grown younger by 0.5% over the past four years. (Table 4.2).

Figure 4.3
Median Age 2018

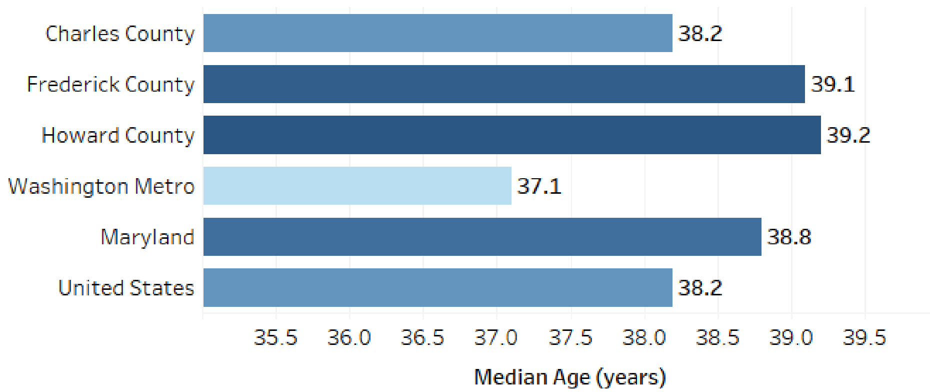


Table 4.2
Median Age Change, 2014–2018

Geography	2014	2018	Median Age Change
Charles County	38.4	38.2	-0.5%
Frederick County	39.4	39.1	-0.8%
Howard County	38.4	39.2	2.1%
Washington Metro	36.4	37.1	1.9%
Maryland	38.3	38.8	1.3%
United States	37.7	38.2	1.3%

Table 4.3
Population Distribution among Age Groups 2018
Highest Percentage Shaded

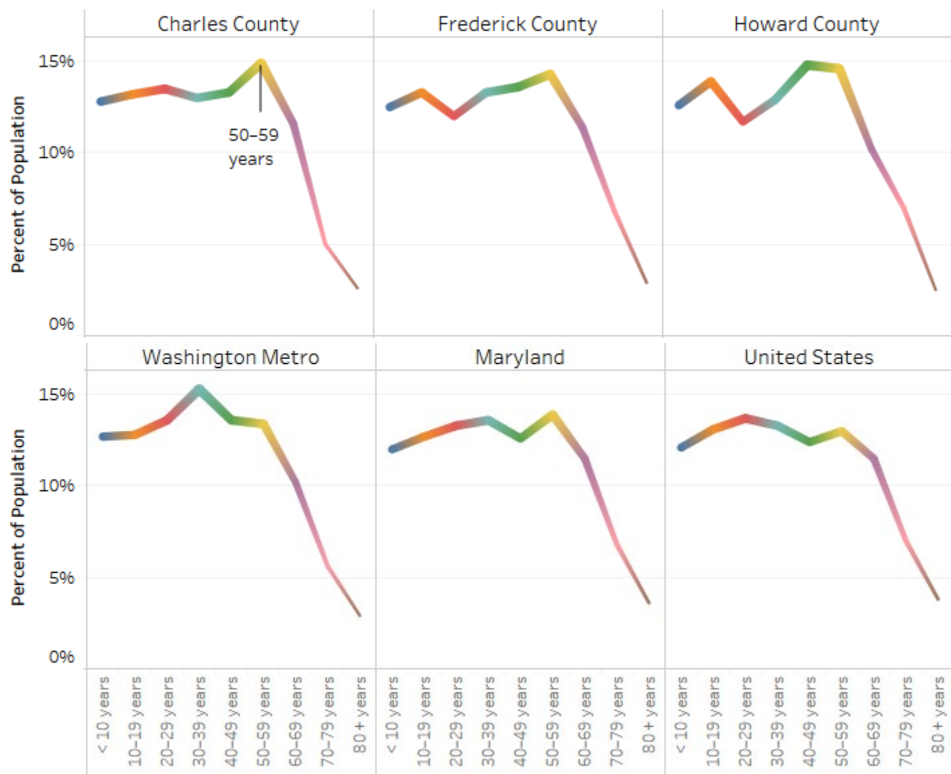
Geography	<10 yrs	10–19 yrs	20–29 yrs	30–39 yrs	40–49 yrs	50–59 yrs	60–69 yrs	70–79 yrs	80+ yrs
Charles County	12.8%	13.2%	13.5%	13.0%	13.3%	14.9%	11.6%	5.0%	2.6%
Frederick County	12.5%	13.3%	12.0%	13.3%	13.6%	14.3%	11.4%	6.8%	2.9%
Howard County	12.6%	13.9%	11.7%	12.9%	14.8%	14.6%	10.2%	7.0%	2.5%
Washington Metro	12.7%	12.8%	13.6%	15.3%	13.6%	13.4%	10.2%	5.6%	2.9%
Maryland	12.0%	12.7%	13.3%	13.6%	12.6%	13.9%	11.5%	6.8%	3.6%
United States	12.1%	13.1%	13.7%	13.3%	12.4%	13.0%	11.5%	7.0%	3.8%

Source: U.S. Census Bureau American Community Survey (ACS), Garner Economics

All benchmark counties show the trend toward an older population in the age range of 40–59 years old compared to the Washington Metro which has more 30- to 39-year-olds. Charles County shows an even distribution of ages of those younger than 60 years old with a higher concentration of population under 10 years and 50–59 years, compared to benchmarks (Table 4. 3, Figure 4.4).

Charles County showed a slight increase in population ages 25–64-year-olds between 2014 and 2018 (Figure 4.5). This set of working-age population in the county is second only to the Washington Metro in 2018. Charles County showed 3% more 60-69-year-olds from 2014 to 2018 (Figure 4.6). The age groups of 10-19-year-olds and 40-49-year-olds decreased from the same four-year time frame.

Figure 4.4
Population Distribution Among Age Groups 2018



Source: U.S. Census Bureau ACS, Garner Economics

Figure 4.5
Percent of Population Ages 25–64 years

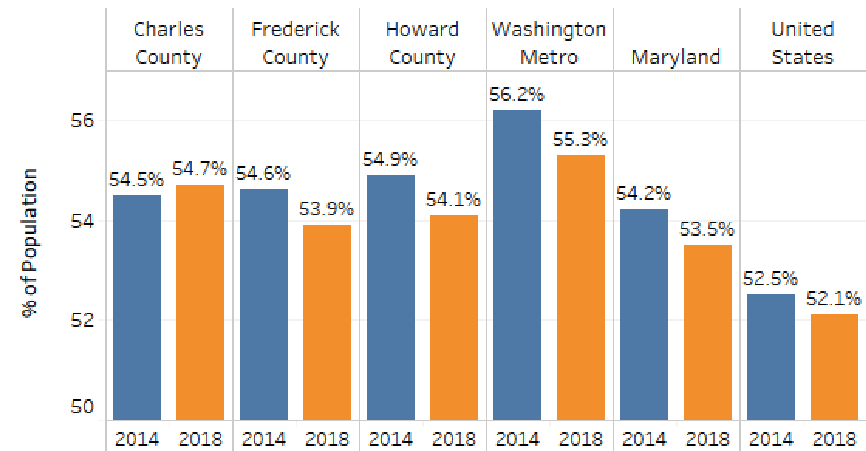
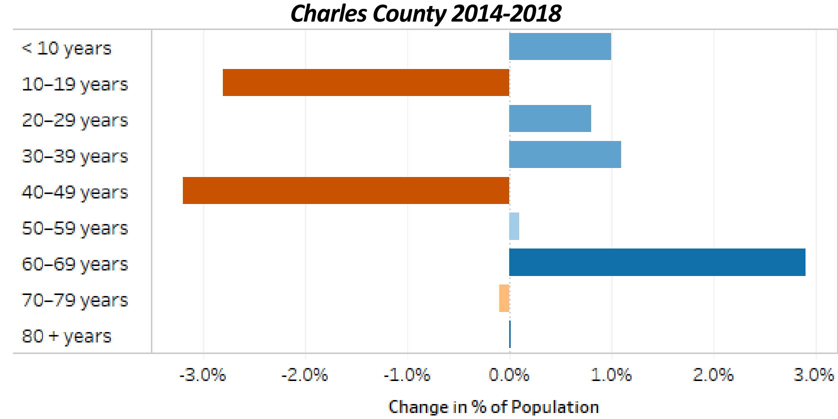


Figure 4.6
Population Change in Age Groups
Charles County 2014-2018



Diversity

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity to attract and retain certain workers. This is particularly true for multinational firms looking to attract workers from outside the United States. As talent attraction and retention are key factors in economic development today, there is a rising awareness by some companies with strong corporate cultures regarding diversity to seek areas that reflect or support inclusiveness and equity among many groups of people.

Charles County has diversity with 47.9% of the population who identify themselves as *Black or African American* and 42.7% identify themselves as *White* (Table 4.4). Most geographies reviewed were moving toward more diversity from 2014 to 2018 in racial and ethnic origin.

Table 4.4
Population Diversity 2018
Highest Percentage Shaded

Geography	% White	% Black or African American	% Asian	% Two or More Races	% Other	% Hispanic or Latino of Any Race
Charles County	42.7%	47.9%	3.2%	4.8%	1.4%	6.0%
Frederick County	81.0%	10.2%	4.1%	3.4%	1.3%	10.2%
Howard County	56.2%	20.0%	18.3%	3.8%	1.7%	7.1%
Washington Metro	53.0%	25.3%	10.0%	4.7%	7.0%	16.2%
Maryland	54.7%	30.0%	6.3%	3.7%	5.4%	10.4%
United States	72.2%	12.7%	5.6%	3.4%	6.0%	18.3%
Change 2014–2018						
Geography	**% White**	**% Black or African American**	**% Asian**	**% Two or More Races**	**% Other**	**% Hispanic or Latino of Any Race**
Charles County	-4.8%	5.7%	0.4%	-0.9%	-0.4%	0.8%
Frederick County	-0.2%	0.9%	-0.4%	-	-0.3%	1.7%
Howard County	-3.8%	1.3%	2.0%	-	0.6%	0.8%
Washington Metro	-2.8%	0.1%	0.2%	0.9%	1.7%	1.1%
Maryland	-2.7%	0.3%	0.1%	0.8%	1.6%	1.1%
United States	-1.2%	0.1%	0.4%	0.4%	0.3%	0.9%

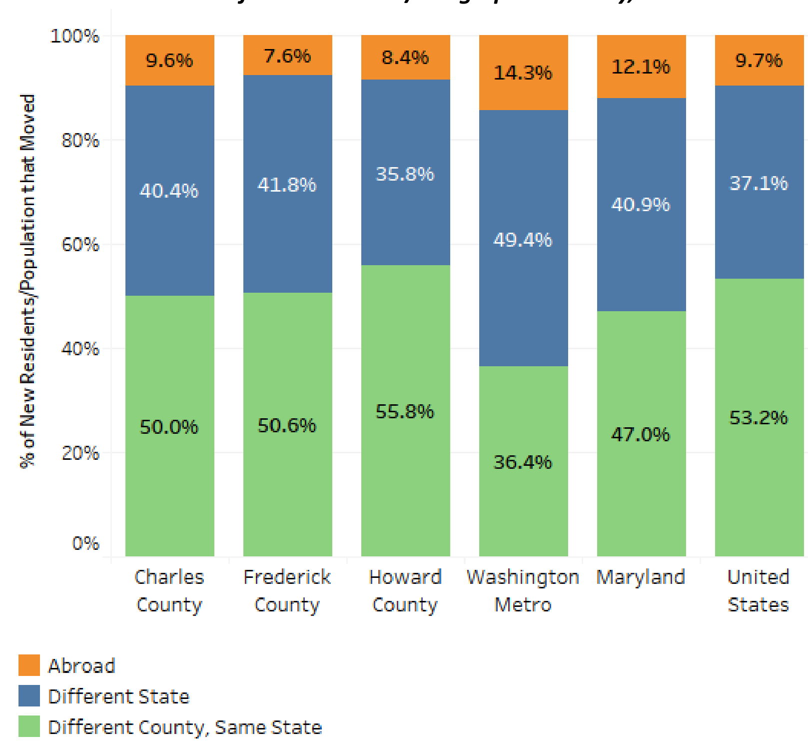
Source: U.S. Census Bureau ACS, Garner Economics

New Residents

Attracting new residents from a diversity of outside locations can reflect the county's broader appeal and provide an indicator of economic dynamism. Population grows from net migration and natural increase. Exploring the population that has moved within the last year reveals general sources of **incoming residents, not net migration.**

Charles County gained 8,256 new residents from domestic and international moves which represent about 5.2% of the total population (Table 4.5, Figure 4.7). Exactly half of new residents to the county moved from another county in Maryland. The Washington Metro brought in the highest percentage of people from *Abroad*, which may also include American citizens returning from overseas as well as non-American immigration.

Figure 4.7
Sources of New Residents/Geographic Mobility, 2018



Source: U.S. Census Bureau ACS, Garner Economics

Table 4.5
New Residents, 2018
Highest Percentage Shaded

Geography	% New Residents in 2017*	# Total New Residents 2017*	Same State	Different State	Abroad
Charles County	5.2%	8,256	50.0%	40.4%	9.6%
Frederick County	7.9%	19,945	50.6%	41.8%	7.6%
Howard County	9.5%	30,406	55.8%	35.8%	8.4%
Washington Metro	7.7%	475,566	36.4%	49.4%	14.3%
Maryland	6.6%	394,318	47.0%	40.9%	12.1%
United States	6.2%	20,058,982	53.2%	37.1%	9.7%

** Those who have moved within the past year*
Source: U.S. Census Bureau ACS, Garner Economics

Educational Attainment

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

Although well-educated, Charles County's population ages 25 and older fall behind benchmarks in higher education with only the national educational attainment at lower levels (Figure 4.8). In 2018, an overwhelming 94.4% of the County's population had *High School Graduates* or higher credentials and 64% of residents had *Some College* education or higher compared to 61.7% just four years earlier. The most significant growth during this four-year period was the percentage of residents who hold Bachelor's Degrees (Figure 4.9).

Figure 4.9
Charles County Change in Educational Attainment 2014–2018

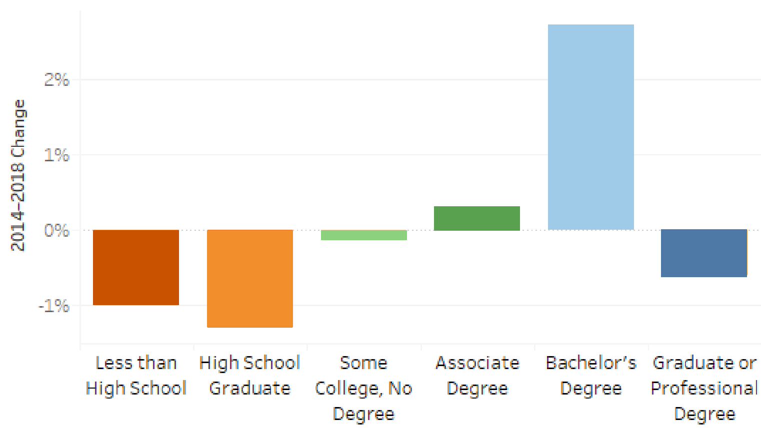
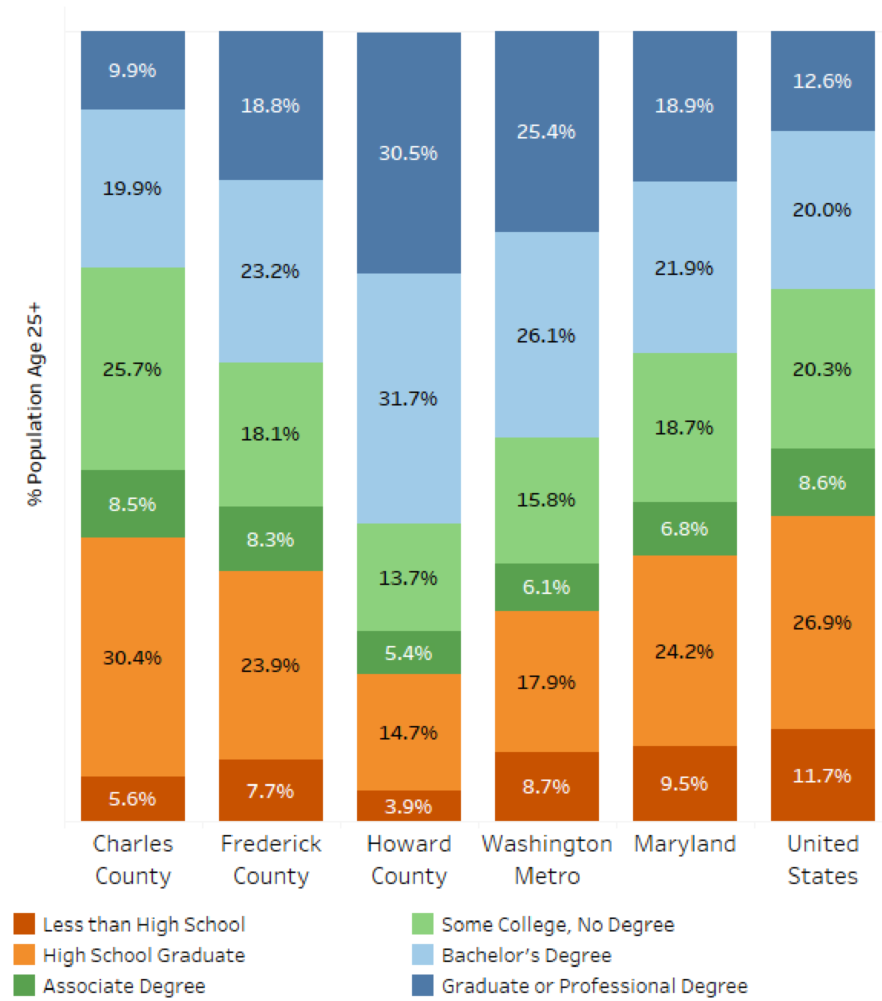


Figure 4.8
Educational Attainment 2018



Source: U.S. Census Bureau ACS, Garner Economics

Secondary School Performance

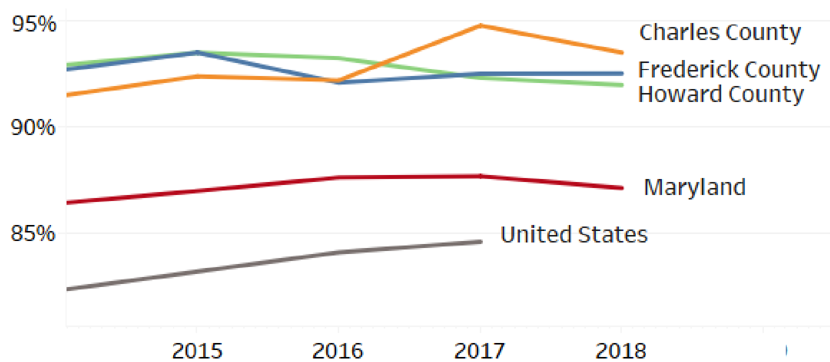
The share of high school students that graduate within four years of beginning ninth grade is an important measure of the performance of local public school districts.

Charles County has consistently ranked above the state and nation in four-year graduation rates (Table 4.6, Figure 4.10). The County increased the graduation by 2.5 points in 2017. The rate slipped in 2018, however, Charles County achieved the highest rate among benchmarks for 2017 and 2018.

Table 4.6
4-Year Cohort High School Graduation Rates
Highest Rate Shaded

	2014	2015	2016	2017	2018
Charles County	91.4%	92.4%	92.2%	94.7%	93.5%
Frederick County	92.6%	93.5%	92.1%	92.5%	92.5%
Howard County	92.9%	93.5%	93.2%	92.3%	92.0%
Maryland	86.4%	87.0%	87.6%	87.7%	87.1%
United States	82.3%	83.2%	84.1%	84.6%	n/a

Figure 4.10
Graduation Rates



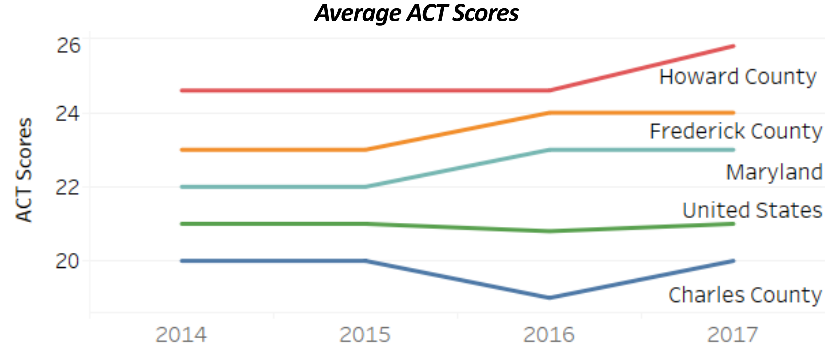
Standardized testing is another comparative tool to provide a measure of the "final product" of public schools. The SAT and ACT exams are a standardized test for college admissions in the United States and are widely accepted as a measure of education quality.

Charles County's average score for the SAT was 1021 and average score for the ACT was 20 in 2017, the last year data was available for all geographies (Table 4.7, Figure 4.11). Overall, the county has consistently performed below most benchmarks in both standardized tests and did not improve where results were directly comparable.*

Table 4.7
Average SAT & ACT Scores
Highest Score Shaded

Geography	SAT Scores*		ACT Scores	
	2014	2017	2014	2017
Charles County	1454	1021	20	20
Frederick County	1555	1131	23	24
Howard County	1658	1161	25	26
Maryland	1439	1050	22	23
United States	1498	1060	21	21

Table 4.11
Average ACT Scores



** 2014 and 2017 SAT data not directly comparable due to scoring changes.*

Source: Maryland Department of Education, County School Systems, Garner Economics

Household Income

The county's median household income in 2018 was $94,368, just below Frederick County but below Howard County and the Washington Metro (Figure 4.12, Table 4.8). Charles County ranks ahead of the state and nation for median household income.

Figure 4.12
Median Household Income 2018

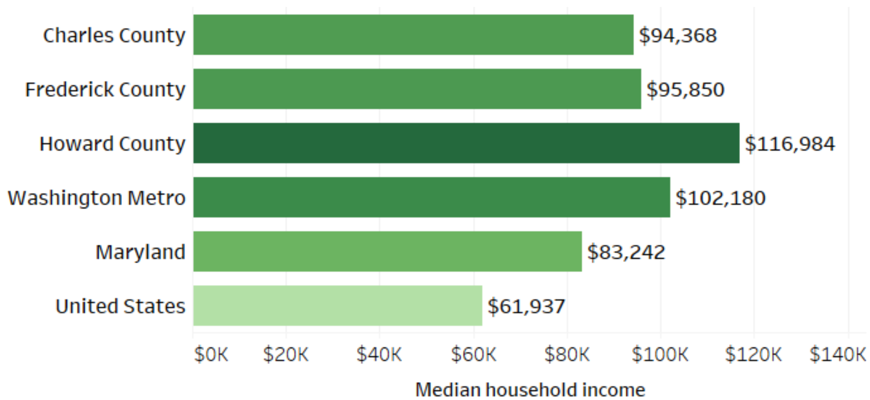
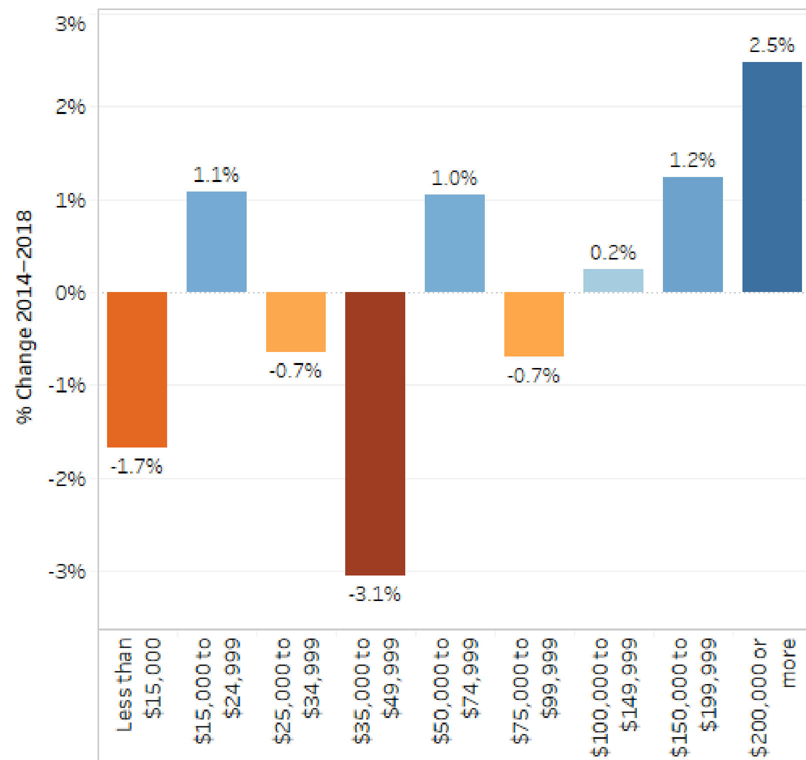


Table 4.8
Median Household Income 2018
Highest Value Shaded

Geography	2014	2018	% Change 2014–2018
Charles County	$88,803	$94,368	6.3%
Frederick County	$84,203	$95,850	13.8%
Howard County	$107,490	$116,984	8.8%
Washington Metro	$91,193	$102,180	12.0%
Maryland	$73,971	$83,242	12.5%
United States	$53,657	$61,937	15.4%

Charles County did see an increase (2.5%) among those households making *$200,000 or More* from 2014-2018 (Figure 4.13). Overall, households with incomes above $100,000 increased over the past four years. Households earning *$35,000 to $49,000* decreased 3.1 percent over the same time frame.

Figure 4.13
Household Income Distribution Change
Charles County 2014–2018

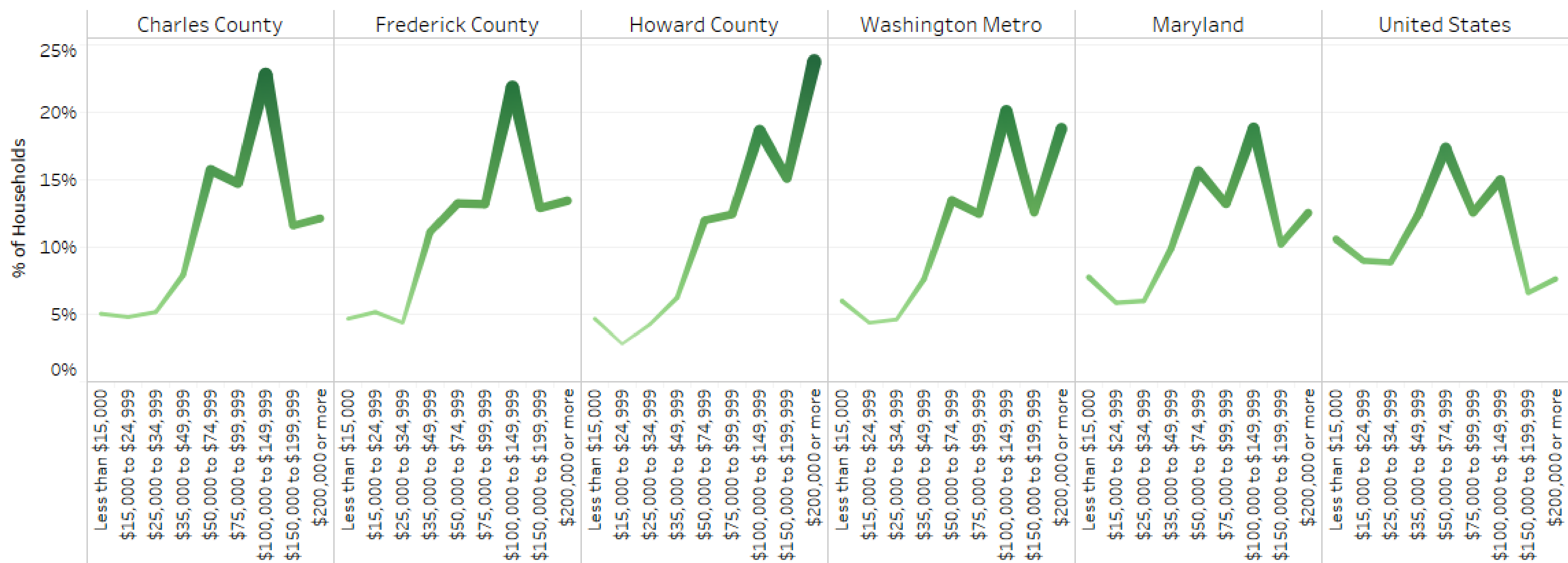


Source: U.S. Census Bureau ACS, Garner Economics

Table 4.9
Household Income Distribution 2017
Highest Percentage Shaded

Income Category	Less than $15,000	$15,000 to $24,999	$25,000 to $34,999	$35,000 to $44,999	$45,000 to $59,999	$60,000 to $99,999	$100,000 to $149,999	$150,000 to $199,999	$200,000 or more
Charles County	5.0%	4.8%	5.2%	7.9%	15.7%	14.7%	22.8%	11.6%	12.1%
Frederick County	4.7%	5.2%	4.4%	11.1%	13.2%	13.2%	21.9%	12.9%	13.4%
Howard County	4.7%	2.8%	4.3%	6.3%	12.0%	12.4%	18.7%	15.1%	23.8%
Washington Metro	6.0%	4.4%	4.6%	7.6%	13.5%	12.5%	20.1%	12.6%	18.8%
Maryland	7.8%	5.9%	6.0%	9.9%	15.7%	13.2%	18.8%	10.2%	12.5%
United States	10.6%	9.0%	8.9%	12.4%	17.4%	12.6%	15.0%	6.6%	7.6%

Figure 4.14
Household Income Distribution, 2018



Source: U.S. Census Bureau ACS, Garner Economics

Personal Income

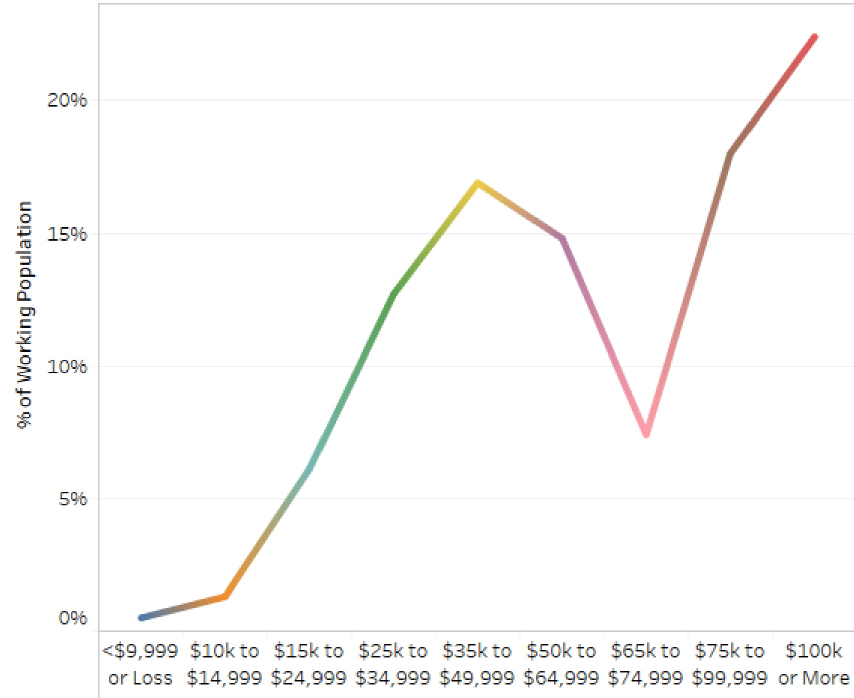
Earnings for individuals reflect the income for residents regardless of where they work or others' earnings in their household. The data capture individuals ages 16 or over who are full-time, year-round workers with earnings.

Charles County's average individual earnings of $71,665 are higher than the national average but ranks below all other benchmarks (Table 4.10). Personal income grew 6.3% over the past four years, which underperforms when compared to the growth of the other geographies in this study. The 2018 personal income distribution for the County shows strength in mid-range levels of $35,000–$49,999. with the highest concentration in incomes above $75,000, illustrated in Figure 4.15.

Table 4.10
Average Personal Income
Highest Relative Figure Shaded

Geography	2014	2018	% Change in Personal Income
Charles County	$67,400	$71,665	6.3%
Frederick County	$69,807	$82,308	17.9%
Howard County	$89,482	$99,020	10.7%
Washington Metro	$81,013	$90,501	11.7%
Maryland	$70,289	$77,139	9.7%
United States	$59,312	$66,189	11.6%

Figure 4.15
Personal Income Distribution
Charles County, 2018



Source: U.S. Census Bureau ACS, Garner Economics

Per Capita Income

Per capita income is the average annual income computed for every man, woman, and child. It is derived by dividing aggregate income by the total population. Per capita income is a measure for all residents regardless of where they work, their age, or whether they derive any income.

Charles County's 2018 per capita income was lower than all benchmarks, except the nation, and grew at a rate behind all other comparatives (Table 4.11).

Table 4.11
Per Capita Income
Highest Relative Figure Shaded

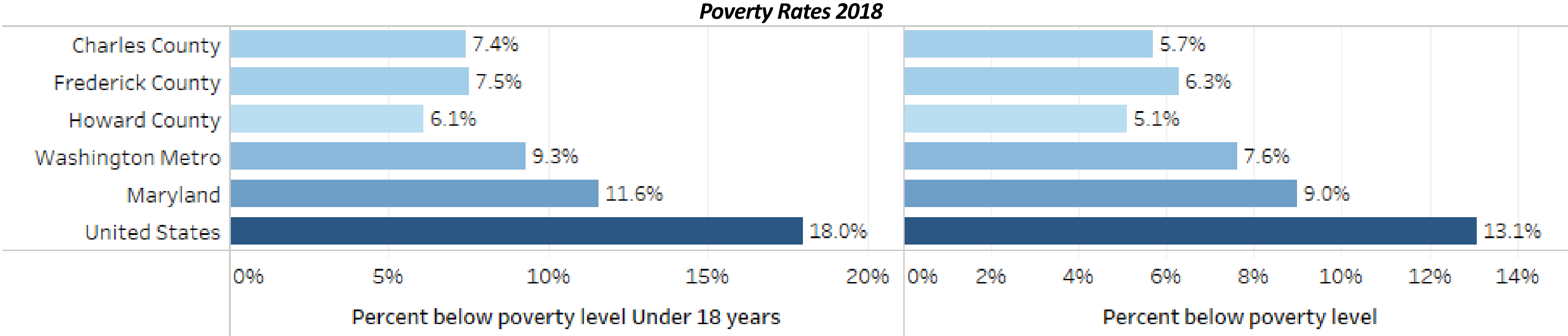
Geography	2014	2018	% Change in Per Capita
Charles County	$35,978	$38,848	8%
Frederick County	$36,907	$43,762	19%
Howard County	$46,988	$52,654	12%
Washington Metro	$43,371	$49,436	14%
Maryland	$36,338	$41,522	14%
United States	$28,889	$33,831	17%

Source: U.S. Census Bureau, Garner Economics

Poverty

The measurement of poverty in the County helps to evaluate the well-being of the citizens and the state of the economy. Charles County is fortunate to be located in an affluent area of the country. Howard County has the lowest poverty rates for the general population and for Children Under 18, and Charles County is second lowest for both categories among benchmarks (Figure 4.16). The United States has the highest poverty rates across the board.

Figure 4.16
Poverty Rates 2018



Source: U.S. Census Bureau ACS, Garner Economics

Crime

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

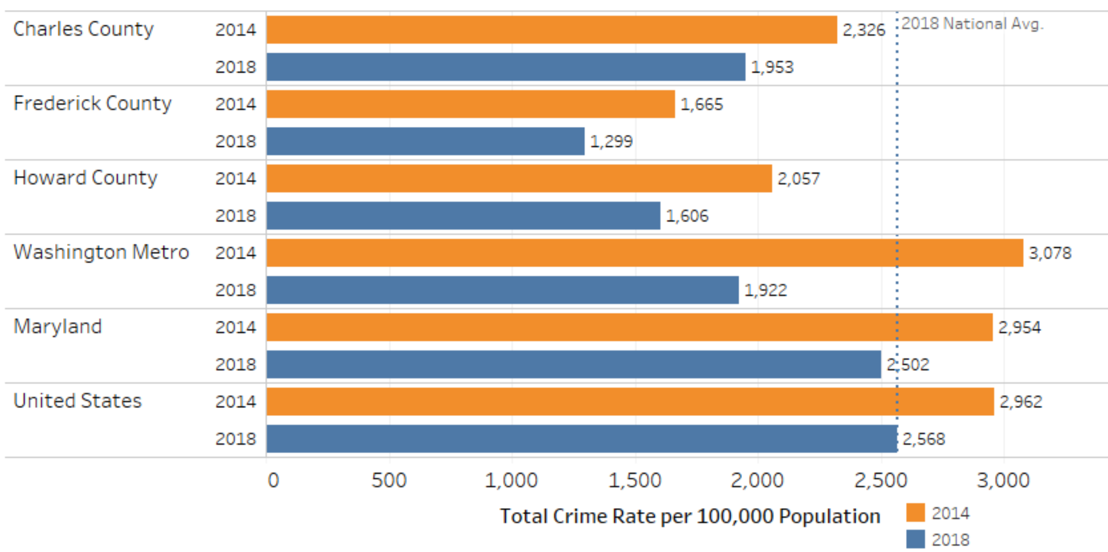
Charles County has a total crime rate below the state and the nation and slightly above the Washington Metro (Table 4.12, Figure 4.17). In 2018, 1,953 incidents were reported per 100,000 residents in Charles County. Crime reported has decreased by 16% between 2014 and 2018 in the County.

Research is based on crimes reported and published in the *FBI Uniform Crime Report for 2018*. Crimes reported for Charles County are compiled from the Charles County Sheriff's Office and the La Plata Police Department.

Table 4.12
Crime Rates per 100,000 Persons
Lowest Rate Shaded

	Crime Rate		Percent Change
Geography	**2014**	**2018**	**2014–2018**
Charles County	2326	1953	-16%
Frederick County	1665	1299	-22%
Howard County	2057	1606	-22%
Washington Metro	2954	1922	-35%
Maryland	2962	2502	-16%
United States	3078	2568	-17%

Figure 4.17
Total Crime Rates per 100,000 persons 2014–2018



Sources: Uniform Crime Reports, FBI; Garner Economics

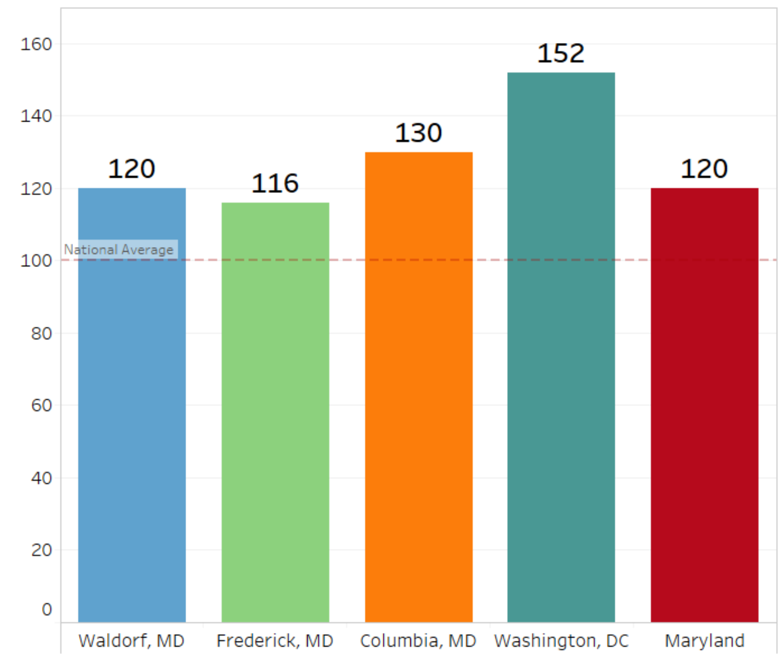
Cost of Living

Generally speaking, Charles County has a higher cost of living than the national average. However, since the County is located in the Washington Metro area with a collective higher cost of living, the cost of living is relative within the Metro. Waldorf, Maryland, the largest city within Charles County has a lower cost of living compared to the other benchmarks in this study except for Frederick, Maryland.

The cost-of-living index is available for cities and aggregated to the state level, then compared to a national average of 100. Cost-of-living indicators for cities reflect the general cost of mid–management-level living in that area for a set basket of goods and services.

The composite Cost-of-Living Index for Waldorf is 120 compared to 116 for Frederick, Maryland; 130 for Columbia, Maryland; and 152 for Washington DC (Table 4.13, Figure 4.18). The state of Maryland was estimated to have an index of 120. Charles County ranked above national levels for all subcategories analyzed in the cost-of-living index.

Figure 4.18
Cost-of-Living Index, 2019



Source: AreaVibes.com derived from C2ER Index,
Garner Economics

Table 4.13
Cost of Living Index, 2019
Lowest Figure Shaded

Index	Waldorf, MD	Frederick, MD	Columbia, MD	Washington, DC	Maryland
Cost-of-Living Index	120	116	130	152	120
Goods & Services	109	113	106	123	109
Groceries	117	115	107	113	111
Health Care	107	94	92	101	93
Housing	147	133	189	235	150
Transportation	110	106	103	112	104
Utilities	103	100	107	114	104

Chapter 5: Economic Dynamics & Employment Trends

This chapter focuses on the labor market of Charles County, Maryland, beginning with the residents within the County, then exploring commuting patterns with the surrounding area and the full labor force draw of 45-minute drive-time from Waldorf, Maryland. The data then transitions to employer-based information, including employment, industry composition, wage comparisons, and additional workplace statistics for those working in Charles County.

Labor Force

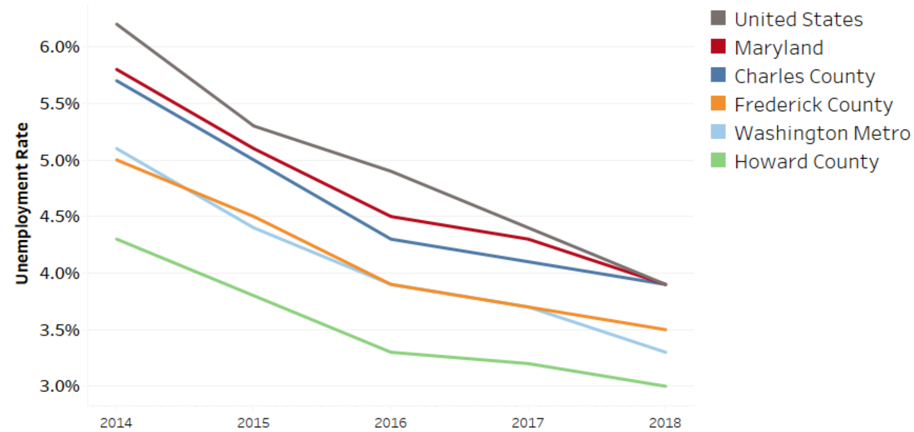
The labor force for Charles County has steadily grown with a 6% increase between 2014 and 2018. The 2018 figures for Charles County show a labor force of 85,104 (Table 5.1). According to the Bureau of Labor Statistics, Charles County had the highest labor force growth, second only to Howard County. The size of this residential labor market is comparatively smaller than the benchmarks.

Table 5.1
Labor Force
Highest Rate of Change Shaded

	2014	2018	2014–2018 Change	2014–2018 % Change
Charles County	80,072	85,104	5,032	6.3%
Frederick County	127,923	130,831	2,908	2.3%
Howard County	173,235	183,889	10,654	6.2%
Washington Metro	3,261,767	3,393,091	131,324	4.0%
Maryland	3,123,048	3,197,137	74,089	2.4%
United States	155,922,000	162,075,000	6,153,000	3.9%

Unemployment trends for Charles County, shown in Figure 6.3, have mirrored all benchmarks in their decline. The 2018 annual average unemployment rate for Charles County was 3.9%, the same rate as Maryland and the United States.

Figure 5.1
Unemployment rate 2014–2018



Source: Bureau of Labor Statistics, Garner Economics

Labor Force Participation

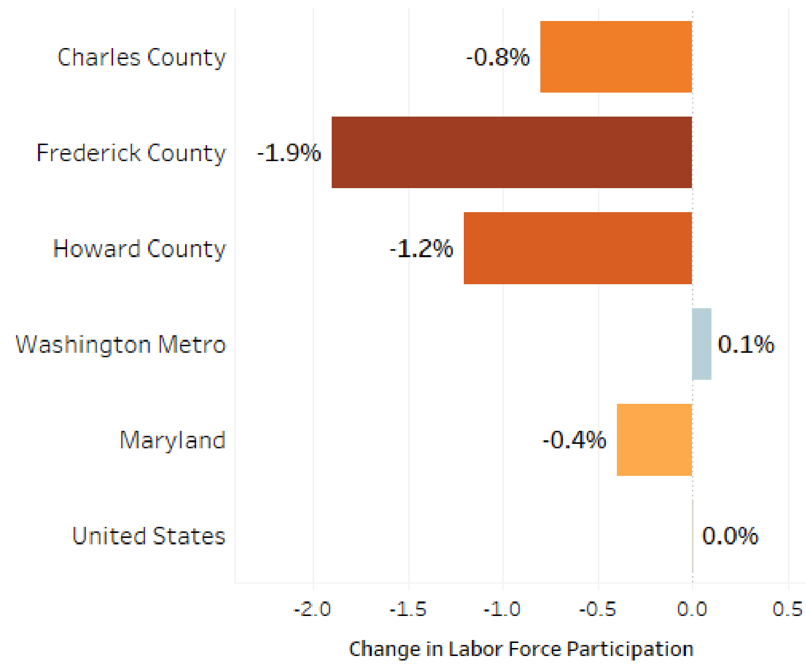
Charles County has a labor participation rate of 67.2%, which is above the national rate but below all other benchmarks.

Declining labor force participation is a national trend and all areas studied showed participation decreases with the exception of the Washington Metro, which increased only 0.1% (Table 5.2, Figure 5.2). Charles County experienced a decrease of 0.8% in its labor force participation rate while Frederick and Howard Counties fell 1.9% and 1.2%

Table 5.2
Labor Force Participation Rate
Highest Rate Shaded

	2014	2018	2014–2018 Change
Charles County	68.0%	67.2%	-0.8%
Frederick County	71.0%	69.1%	-1.9%
Howard County	72.1%	70.9%	-1.2%
Washington Metro	71.8%	71.9%	0.1%
Maryland	68.1%	67.7%	-0.4%
United States	63.3%	63.3%	0.0%

Figure 5.2
Change in Labor Force Participation 2014–2018



Source: U.S. Census Bureau ACS, Garner Economics

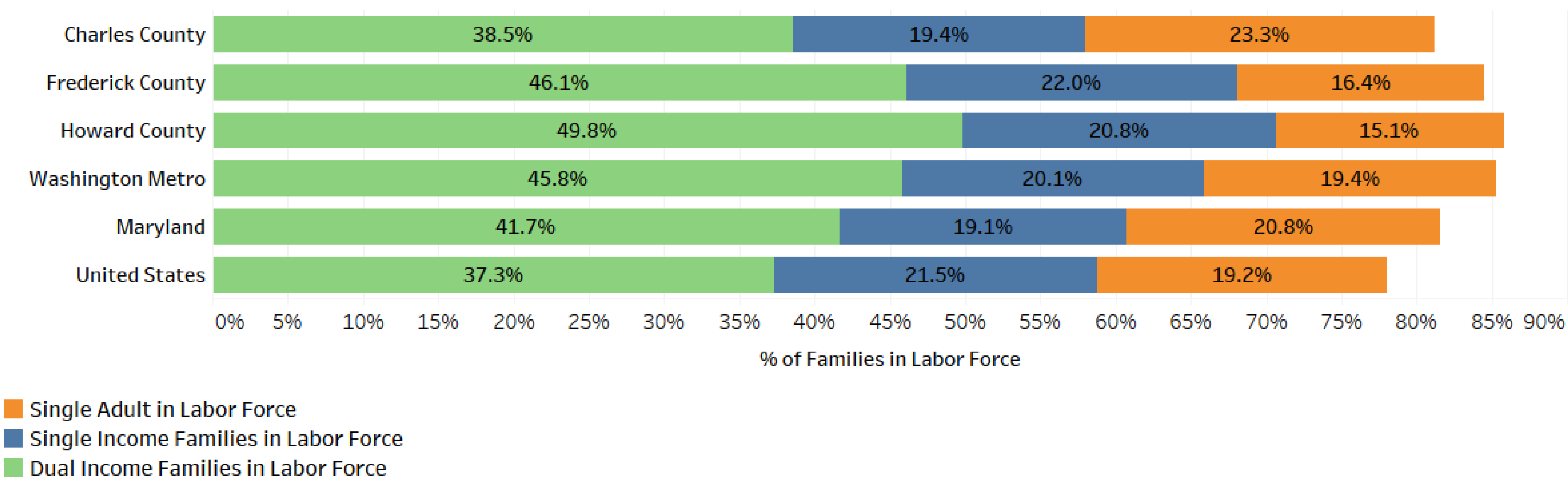
Labor Force Participation—Families

Among all families in Charles County, 38.5% are Dual Income Families, which is the biggest sector of families participating in the labor force (Table 5.3, Figure 5.3). Charles County has the highest share of Single Adults in Labor Force, at 23.3%. Overall, the participation rate of families in the County is 81.2%, which is higher than the nation but lower than all other benchmarks.

Table 5.3
Labor Force Participation of Families, 2018
Highest Rate Shaded

	Charles County	Frederick County	Howard County	Washington Metro	Maryland	United States
Dual Income Families in Labor Force	38.5%	46.1%	49.8%	45.8%	41.7%	37.3%
Single Income Families in Labor Force	19.4%	22.0%	20.8%	20.1%	19.1%	21.5%
Single Adults in Labor Force	23.3%	16.4%	15.1%	19.4%	20.8%	19.2%
Total Families in Labor Force	**81.2%**	**84.5%**	**85.8%**	**85.3%**	**81.6%**	**78.0%**

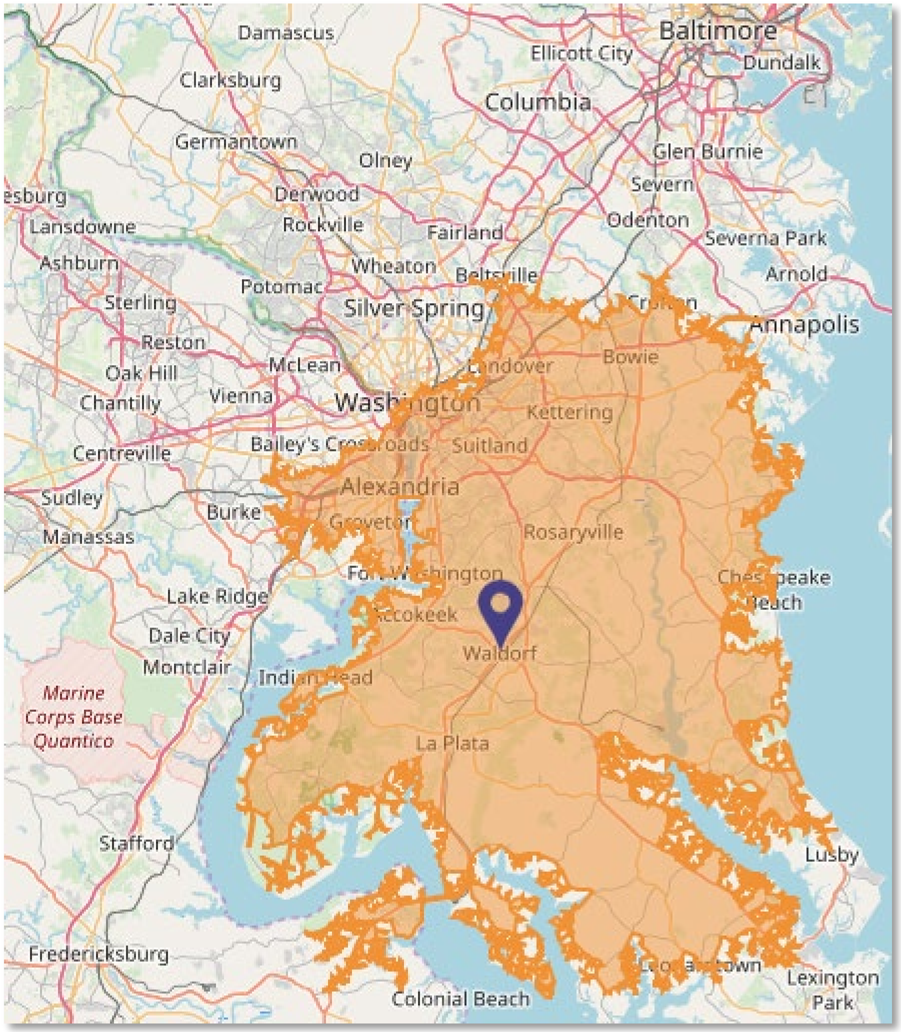
Figure 5.3
Labor Force Participation of Families, 2018



Source: U.S. Census Bureau ACS, Garner Economics

Labor Force Draw

Figure 5.4
Charles County Labor Draw
45-Minute Drive Time Area



The effective labor draw considers the documented labor pool for a location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within a representative drive-time from a site.

Using a 45-minute drive-time analysis from Waldorf, the estimated 2019 population is 1,600,805 (Figure 5.4). The drive-time analysis greatly enhances the existing labor force of 85,100 in Charles County. This 45-minute drive-time reaches the edges of Annapolis, past the beltway into Alexandria and the District of Columbia.

1,600,805

2019 Population

909,519

2019 Labor Force

Source: ESRI, Garner Economics

College Enrollment & Degrees Granted

As important as the existing workforce is, those who will join the ranks of the labor force with degrees or certifications enhance the opportunity for companies to relocate or expand in the area. Within a 45-minute drive-time area from Waldorf, there are 10 colleges, universities, and training institutes. With the addition of the state's flagship insitution University of Maryland at College Park, just outside the drive-time zone, there are nearly 80,000 students enrolled as of the 2017–2018 school year (Figure 5.5, Table 5.4). These 11 higher education assets provide a boost to the workforce pipeline and offer training programs with a variety of concentrations.

The largest school included in this analysis is the University of Maryland at College Park with 44,052 students and more than 11,000 degrees and certificates awarded. Overall, more than 16,634 certificates and degrees were awarded in 2018 by colleges and universities (Table 5.6). The top fields of study include *Business Management, Liberal Arts*, *Engineering, Social Science,* and *Health Professions* (Table 5.5).

The College of Southern Maryland, in Charles County, has an enrollment of 10,265 with *Liberal Arts & Sciences* as the top area of study for students.

Table 5.4
45-Minute Drive-Time, Colleges & Universities*
2018 Enrollment

Name	City	Enrollment
University of Maryland-College Park*	College Park, MD	44,052
Prince George's Community College	Largo, MD	16,868
College of Southern Maryland	La Plata, MD	10,265
Strayer University-Maryland	Suitland, MD	4,765
Gallaudet University	Washington, DC	1,749
Fortis College-Landover	Landover, MD	907
DeVry University-Virginia	Arlington, VA	673
Divine Mercy University	Arlington, VA	325
CET-Alexandria	Alexandria, VA	200
University of Phoenix-Washington DC	Washington, DC	70
Saint Michael College of Allied Health	Alexandria, VA	48
Total Enrollment		**79,922**

Source: National Center for Educational Statistics, ESRI, Garner Economics

**University of Maryland-College Park is just outside of the 45-minute drive time*

Figure 5.5
45-Minute Drive-Time
Colleges and Universities

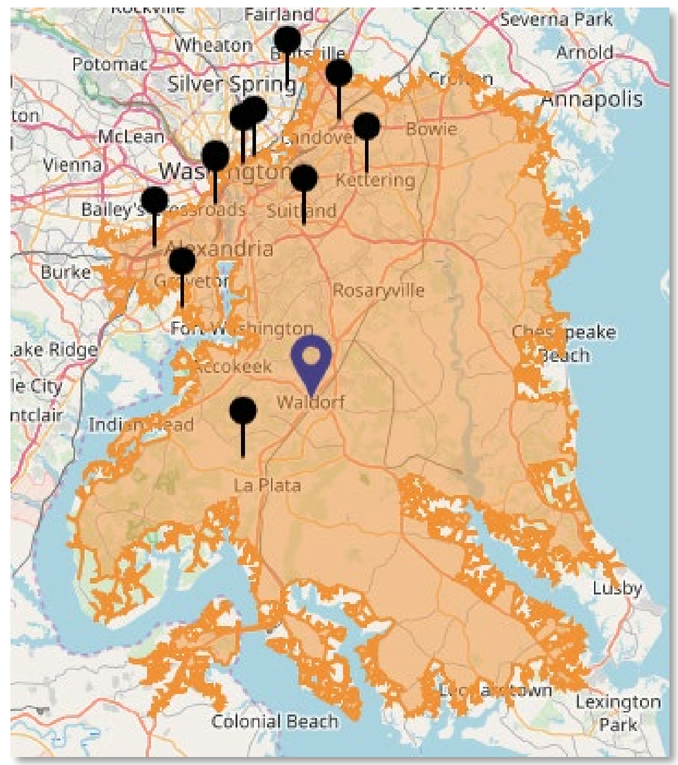


Table 5.5
45-Minute Drive-Time, Colleges & Universities*
2018 Degrees & Certificates Granted by Top Areas of Study

Degrees or Certificates Granted 2018	
Business, Management, Marketing, and Related Support Services	2,903
Liberal Arts and Sciences, General Studies and Humanities	2,109
Engineering	1,931
Social Sciences	1,517
Health Professions and Related Programs	1,388
Computer and Information Sciences and Support Services	1,269
Biological and Biomedical Sciences	656
Education	531
Communication, Journalism, and Related Programs	519
Psychology	417
Multi/Interdisciplinary Studies	353
Visual and Performing Arts	302
Mathematics and Statistics	298
Parks, Recreation, Leisure and Fitness Studies	266
Physical Sciences	247
Agriculture, Agriculture Operations and Related Sciences	244
Foreign Languages, Literatures, and Linguistics	238
Public Administration and Social Service Professions	200
English Language and Literature/Letters	192
Family and Consumer Sciences/Human Sciences	174
Architecture and Related Services	129
Area, Ethnic, Cultural, Gender, and Group Studies	119
History	117
Natural Resources and Conservation	111
Total for all degrees/certificates	**16,634**

Source: National Center for Educational Statistics, Garner Economics

Table 5.6
45-Minute Drive-Time, Colleges & Universities*
2018 Degrees & Certificates Granted

Degrees or Certificates Granted, 2018	
Certificates	1,629
Associate Degree	2,493
Bachelor's Degree	8,109
Graduate/Post Graduate Credentials	4,338
Total	**16,634**

CSM college of southern maryland

La Plata, MD

2018 Enrollment: 10,265

Top Areas of Study & Degrees/Certificates Granted

Liberal Arts & Sciences	**1,575**
Business, Management & Marketing	**231**
Health Professions	**173**
Computer & Information Sciences	**151**
Engineering	**56**
Homeland Security, Law Enforcement & Related	**50**
Education	**29**
Engineering Technologies	**28**

**University of Maryland-College Park is just outside of the 45-minute drive time*

Commuting Patterns

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

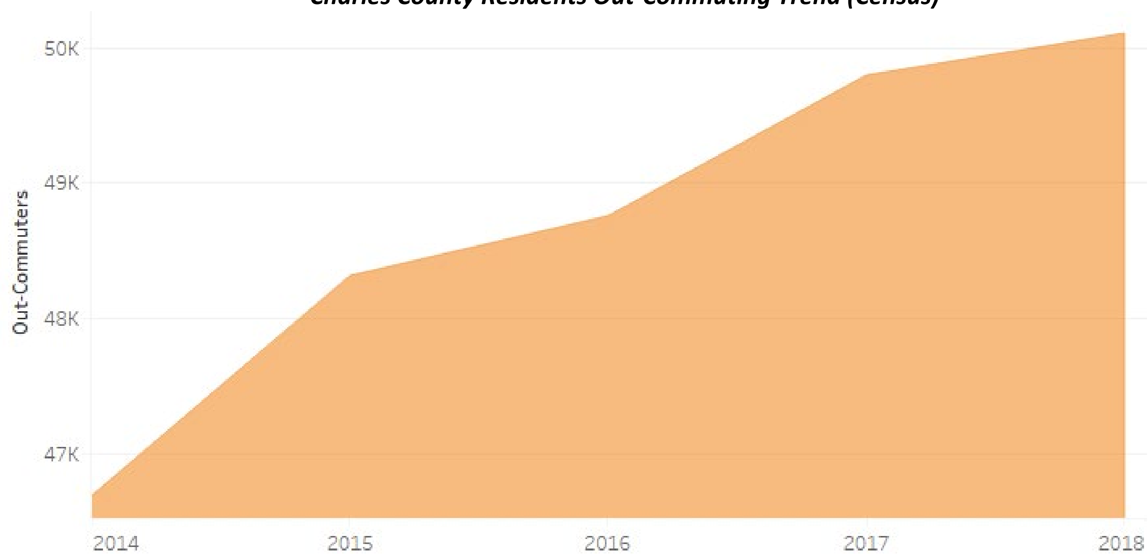
In Charles County, several different sources show that a majority of working residents leave the County for their jobs. For a Washington Metro County, high commuting traffic crossing county and state lines is normal. The U.S. Census Bureau data shows more than 50,000 workers age 16 years or over left their homes in Charles County in 2018 for work. The number of residents commuting out of the County for work is trending upward since 2014 (Figure 5.6).

On the whole, another source provides data on the exchange of out-commuters and in-commuters for Charles County. In 2017, there was a net loss of 26,811 for workers employed at private enterprises (Table 5.7). This source also confirms an increase of out-commuters since 2014 (Figure 5.7).

The number of out-commuters from Charles County can be viewed as potential workers for new and expanding firms looking for educated and skilled talent.

Charles County has a strong commuting connection to neighboring Prince George's County with 9,600 Charles County workers commuting north for work in that county. On the flip side, Prince George's County is the largest in-commuting county with 3,600 workers commuting into Charles County (Figure 5.8; Figure 5.9).

Figure 5.6
Charles County Residents Out-Commuting Trend (Census)



Source: U.S. Census Bureau, American Community Survey, Garner Economics

Figure 5.7
Charles County Private Employment Out-Commuting Trend*

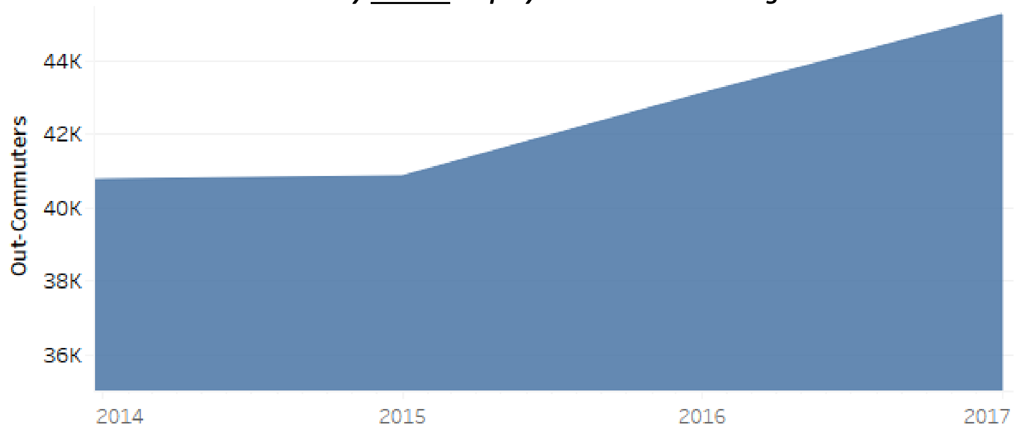


Table 5.7
Charles County Commuting Changes 2014-2017*

Year	Net Job Outflow	Percent Change
2014	-21,625	0.60%
2015	-22,436	-3.80%
2016	-23,559	-5.00%
2017	-26,811	-13.80%
2014-2018 Change	**-5,186**	**-24.0%**

Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD) from On-the-Map, Garner Economics

Figure 5.8
Charles County In-Commuters, 2017*

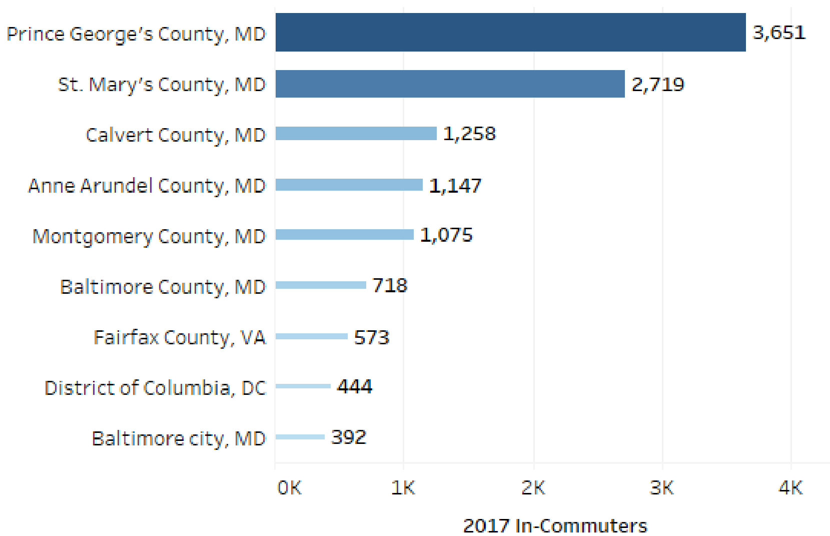
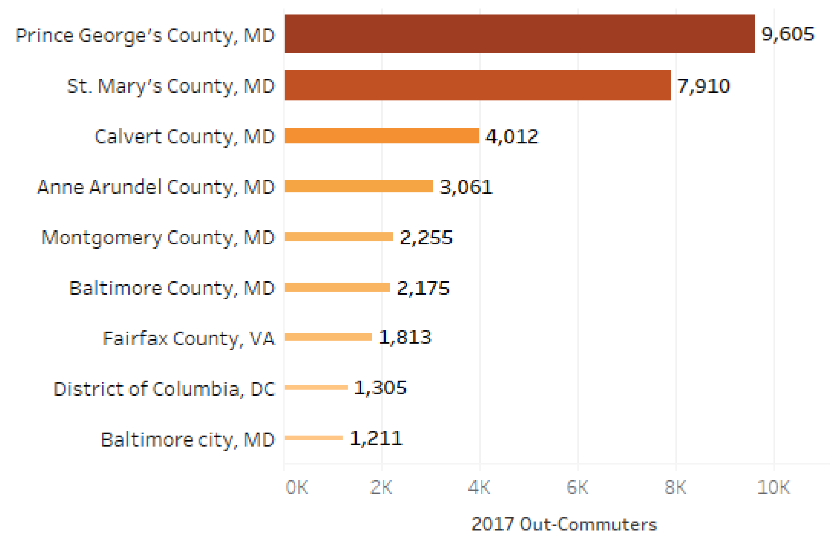


Figure 5.9
Charles County Out-Commuters. 2017*



Source: U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics
**Private Employees*

Average Commute Time

The Charles County average commute time was 45.4 minutes in 2018, which is 2.7% higher than the average time in 2014 (Table 5.8). For an area well known for congestion and long commutes, comparative average commute times were much lower than Charles County.

Additionally, a higher percentage of workers who did not work at home experienced longer commutes in Charles County than the other areas studied (Figure 5.10). In fact, 35% of the commuting population of the County had to travel 60 minutes or more for work.

Table 5.8
Average Commute Time
Lowest Average Commute and Change Highlighted

	2014	2018	2014–2018 % Change
Charles County	44.2	45.4	2.7%
Frederick County	35.3	34.6	-2.0%
Howard County	30.8	31.9	3.6%
Washington Metro	34.5	34.9	1.2%
Maryland	32.3	33.3	3.1%
United States	26.0	27.1	4.2%

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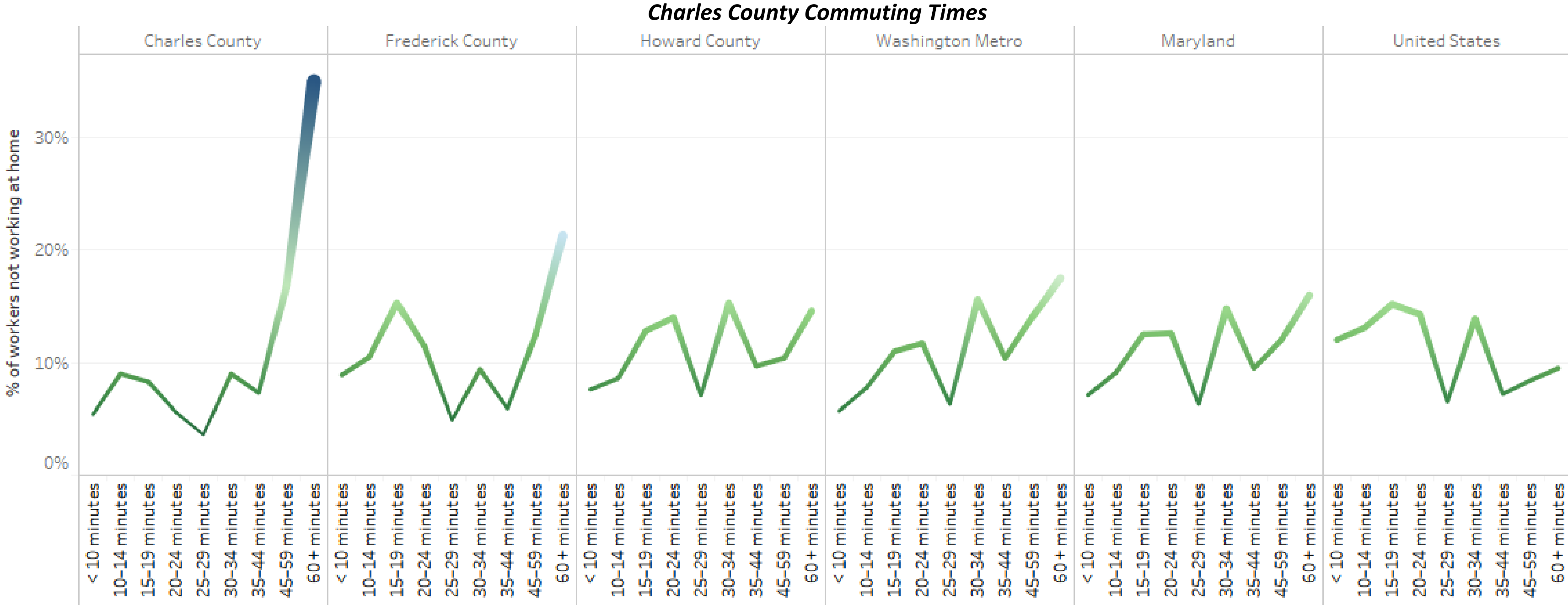
Figure 5.10
Charles County Commuting Times



Source: U.S. Census Bureau ACS, Garner Economics

Employment Change

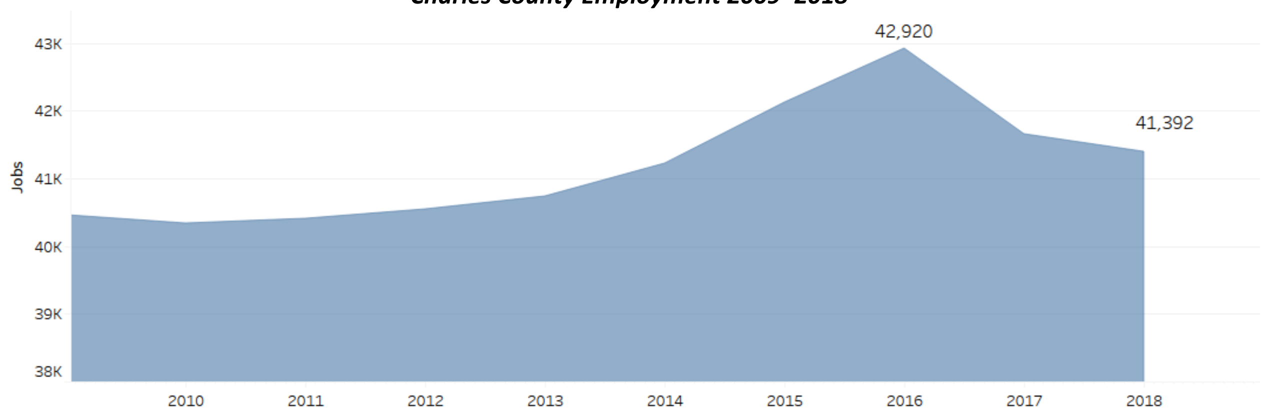
Exploring employment for those who work in Charles County, regardless of where they live, offers insight into the local economy. Charles County experienced modest growth in the past five years. Compiling a five-year look at job growth, Charles County added 649 jobs from 2013 and 2018, which equals a 1.6% increase (Table 5.9). Establishing the same time frame to compare growth, a five-year period ending 2014 was used to measure change from the last report and compare benchmarks. Charles County added 758 jobs from 2009 to 2014, a 1.9% change.

This slow pace of growth was last among benchmarks for all geographies during both five-year data points. Figure 5.11 illustrates employment from 2009 through 2018 in Charles County. More detailed data on employment change will be covered in Chapter 6.

Table 5.9
Employment Change
Highest Percent Change Highlighted

Geography	2018	2009-2014 Change	5 Year % Change 2009-2014	2013–2018 Change	5 Year % Change 2013–2018
Charles County	41,392	758	1.9%	649	1.6%
Frederick County	103,232	3,740	4.1%	8,443	8.9%
Howard County	172,273	16,415	11.4%	12,925	8.1%
Washington Metro	3,147,937	136,085	4.8%	184,942	6.2%
Maryland	2,679,064	91,514	3.7%	147,408	5.8%
United States	146,131,754	8,005,767	6.2%	12,163,320	9.1%

Figure 5.11
Charles County Employment 2009–2018



Source: Bureau of Labor Statistics Quarterly Census of Employment & Wages, Garner Economics

Estimated Annual Wages

In 2018, the estimated average wage per job in Charles County equaled $46,280 annually (Figure 5.12), or $890 weekly. It should be noted that wage applies only to **employment in Charles County** and does not measure wages for those workers who live in the County but commute outside the area (See Commuting earlier in Chapter 5).

Contrasting the average wage of *workers* in the County to average earnings for *residents*, whether they stay in the County for work or out-commute, we see a difference of more than $25,000. Average earnings for residents in 2018 are $71,665 (See Individual Earnings in Chapter 4).

Charles County's average annual wage is the lowest among the benchmark geographies but increased at a rate of 8.8% from the 2014 wage (Figure 5.12, Table 5.10). This is an increase higher than Frederick County. Adjusted for inflation, Charles County's average annual wages grew at a pace well ahead of Frederick County but behind the remainder of the benchmarks (Figure 5.13).

Figure 5.12
Estimated Annual Wages, 2018

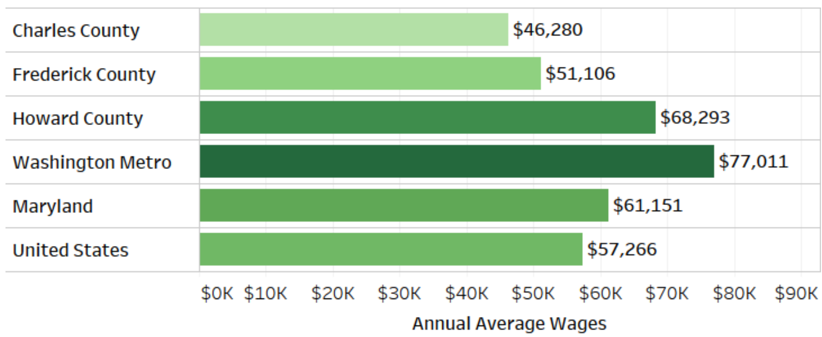
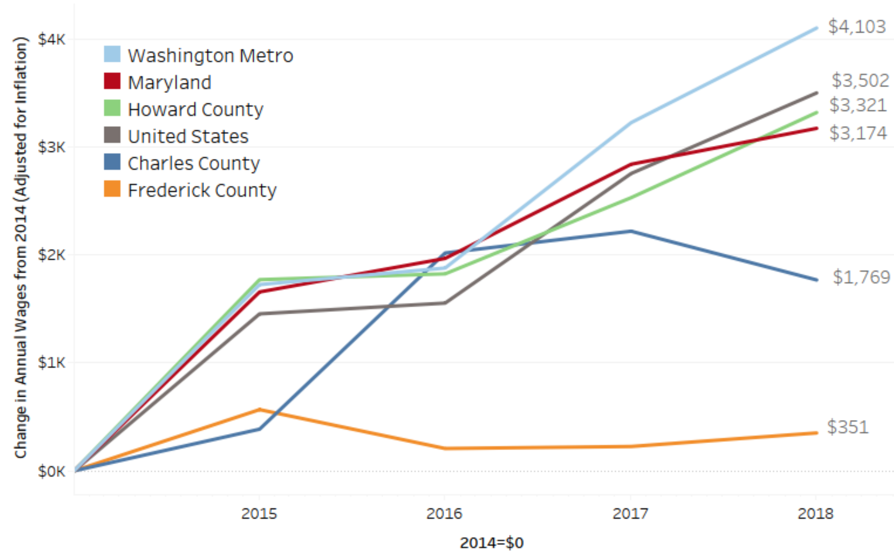


Table 5.10
Annual Wages Adjusted for Inflation
Highest Value Highlighted

Geography	2014	2018	2014–2018 Change	% Change
Charles County	$42,524	$46,280	$3,756	8.8%
Frederick County	$48,489	$51,106	$2,617	5.4%
Howard County	$62,072	$68,293	$6,221	10.0%
Washington Metro	$69,653	$77,011	$7,358	10.6%
Maryland	$55,389	$61,151	$5,762	10.4%
United States	$51,364	$57,266	$5,902	11.5%

Figure 5.13
Annual Wages Adjusted for Inflation



Source: Bureau of Labor Statistics Quarterly Census of Employment & Wages, Garner Economics

New Firm Startups

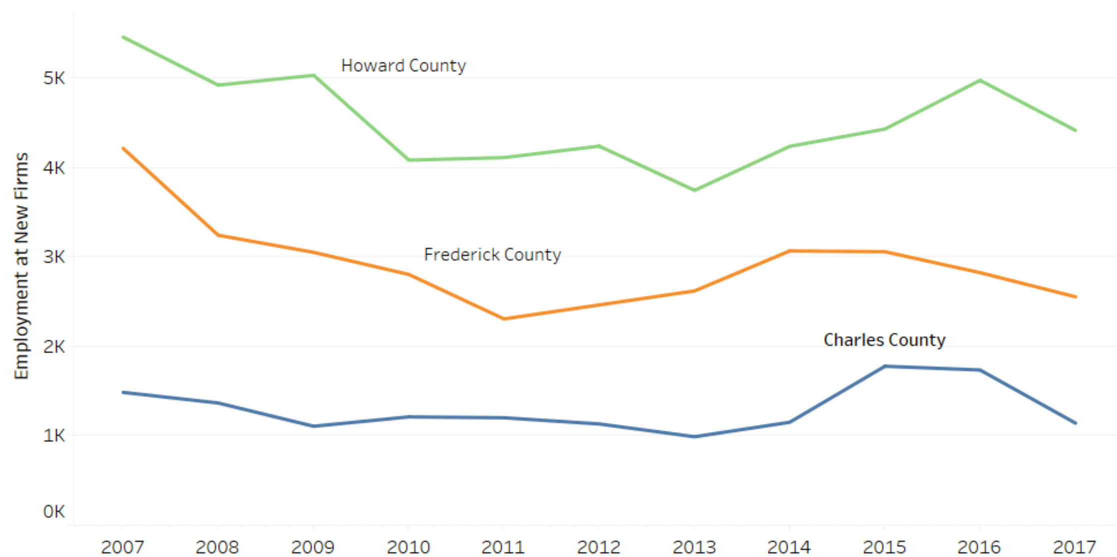
Tracking the rate of startup firms is another good measure of the entrepreneurial ecosystem of an area. The ability to create a new company establishes new jobs and helps bolster the local economy. Additionally, new firms contribute disproportionately to job creation and have an important role in employment growth.

An indicator of startup activity is the employment created by new firms that is available via the Census Bureau in a timely manner. At the local level, the number of people employed at firms that were newly established (0- to 1-year-old) illustrates how startups add to the economy. Charles County experienced an increase in the number of people employed by new firms since 2013 but has declined, along with other benchmarks, from 2016 to 2017 (Figure 5.14).

Table 5.11
Employment at New Firms
Highest Percentage Highlighted

Geography	2014	2017	2014–2017 Change	% Change
Charles County	1,150	1,140	-10	-1%
Frederick County	3,065	2,552	-513	-17%
Howard County	4,234	4,412	178	4%
Washington Metro	76,551	73,337	-3,214	-4%
Maryland	61,558	56,399	-5,159	-8%
United States	4,090,608	4,030,846	-59,762	-1%

Figure 5.14
Employment at New Firms



Source: U.S. Census Bureau, LEHD, Garner Economics

Self-Employment

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

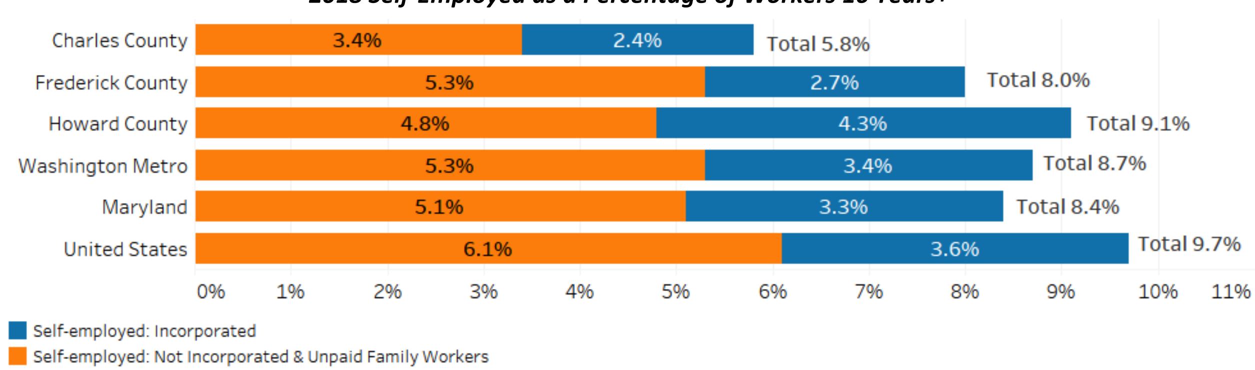
As of 2018, 5.8% of workers in Charles County were self-employed. The proportion is well below the national and state self-employment as well as the benchmark communities (Table 5.12).

Of those self-employed, a slightly higher share is in the category of *Not Incorporated and Unpaid Family Workers* for all geographies versus *Incorporated* ventures (Figure 5.15). All benchmark geographies had modest growth or declined in self-employment over the past four years, with Charles County losing 1% of self-employed from 2014 to 2018.

Table 5.12
Self-Employed as a Percentage of Workers 16 Years+
(Highest Relative Number Shaded)

Geography	Incorporated	Not Incorporated & Unpaid Family Workers	Total Self-Employed	Incorporated	Not Incorporated & Unpaid Family Workers	Total Self Employed	Change in Total Self-Employment
	Self-Employed–2014			Self-Employed–2018			2014–2018
Charles County	2.9%	3.9%	6.8%	2.4%	3.4%	5.8%	-1.0%
Frederick County	3.2%	5.1%	8.3%	2.7%	5.3%	8.0%	-0.3%
Howard County	4.3%	5.1%	9.4%	4.3%	4.8%	9.1%	-0.3%
Washington Metro	3.4%	4.9%	8.3%	3.4%	5.3%	8.7%	0.4%
Maryland	3.2%	4.8%	8.0%	3.3%	5.1%	8.4%	0.4%
United States	3.4%	6.2%	9.6%	3.6%	6.1%	9.7%	0.1%

Figure 5.15
2018 Self-Employed as a Percentage of Workers 16 Years+



Source: U.S. Census Bureau ACS, Garner Economics

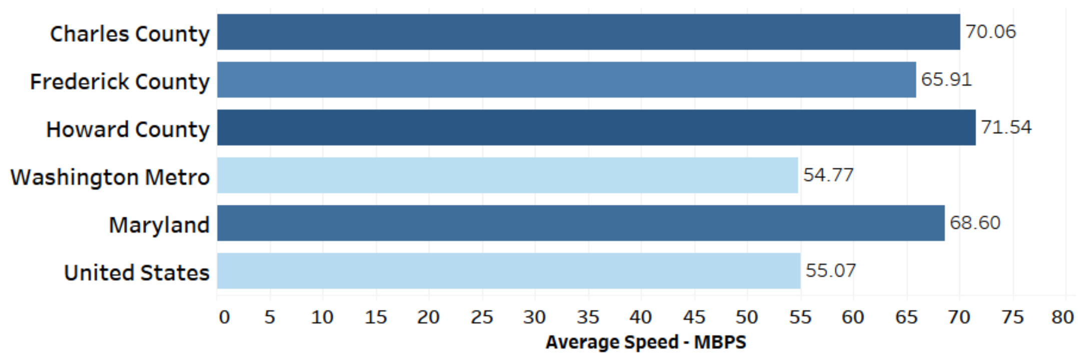
Broadband Availability

Broadband internet access and speed have a big impact on the local economy in terms of supporting business, entrepreneurship, and educational opportunities.

Charles County has good access to broadband internet with 92% of households having providers offering service with speeds of 250 megabytes per second (Mbps) (Table 5.13). Gigabit service is not available according to the FCC Broadband Map as of June 2018; however, according to other sources such as BROADBANDNOW, at least two providers have service nearing gigabit levels. This is a similar situation for Frederick and Howard Counties.

The average speed in Waldorf is 70 Mbps, which is the second highest among the benchmarks (Figure 5.16). This speed is a vast improvement from the 14 Mbps reported in 2014.

Figure 5.16
Average Download Speed, 2019



Source: BROADBANDNOW, 2018

Table 5.13
2018 Broadband Access & Speed Available
Percent of Population with Access
(Highest Relative Figure Shaded)

Broadband Access	Charles County	Frederick County	Howard County	Washington Metro	Maryland	United States
100 Mbps or faster	92.4	93.1	96.2	96.5	96.6	89.1
250 Mbps or faster	92.0	91.3	95.8	95.4	88.8	73.1
1 Gigabit	0.0	0.0	0.0	1.3	0.4	17.3

Source: FCC Broadband Map as of June 2018
ADSL, Cable, Fiber, Fixed Wireless, Satellite, Other

Chapter 6: Local Specialization, Competitiveness & Growth

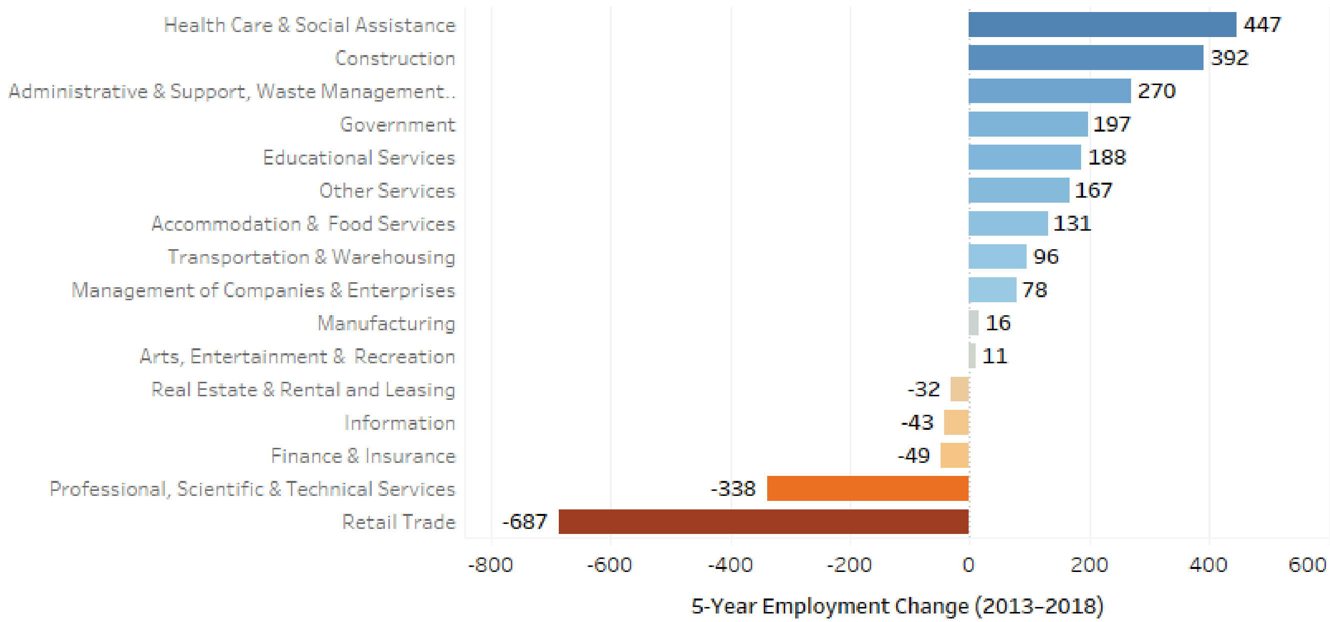
The following section provides a more detailed and in-depth assessment of the Charles County economy. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The assessment's main goals are to provide historic context, reveal areas of unique specialization, gauge competitiveness, and help uncover emerging trends and opportunities. The two main areas of analysis are major industries and occupational groups. For each area, there are relative measures of specialization, growth, local competitiveness, and earnings.

Major Industry Sector Change

The largest absolute industry job gains in Charles County between 2013 and 2018 came from *Health & Social Assistance*, increasing by 447 jobs, followed by *Construction* and *Administrative & Support, Waste Management & Remediation Services* (Table 6.1, Figure 6.1). Overall, Charles County shows a net increase of 649 jobs, taking into consideration covered employment.

Gains were made in about half of the main industry categories with a handful of sectors excluded due to nondisclosure of data, including *Agriculture, Oil & Gas, Utilities*, and *Wholesale Trade*. Losses were experienced in *Retail Trade* (-687) and *Professional, Scientific & Technical Services* (-338).

Figure 6.1
2013–2018 Employment Change by Major Industry



Source: Bureau of Labor Statistics, Garner Economics

Table 6.1
Employment Change by Major Industry 2013–2018
Ranked by Absolute Change

Description	2013 Jobs	2018 Jobs	Job Change 2013–2018	% Change 2013–2018
Health Care & Social Assistance	4,787	5,234	447	9.3%
Construction	3,478	3,870	392	11.3%
Administrative & Support, Waste Management & Remediation	987	1,257	270	27.4%
Government	4,175	4,372	197	4.7%
Educational Services	5,181	5,369	188	3.6%
Other Services	1,410	1,577	167	11.8%
Accommodation & Food Services	5,026	5,157	131	2.6%
Transportation & Warehousing	1,332	1,428	96	7.2%
Management of Companies & Enterprises	155	233	78	50.3%
Manufacturing	605	621	16	2.6%
Arts, Entertainment & Recreation	460	471	11	2.4%
Real Estate & Rental and Leasing	466	434	-32	-6.9%
Information	344	301	-43	-12.5%
Finance & Insurance	695	646	-49	-7.1%
Professional, Scientific & Technical Services	2,025	1,687	-338	-16.7%
Retail Trade	8,317	7,630	-687	-8.3%
Health Care & Social Assistance	4,787	5,234	447	9.3%
Construction	3,478	3,870	392	11.3%
Administrative & Support, Waste Management & Remediation	987	1,257	270	27.4%
Government	4,175	4,372	197	4.7%
Total	**40,743**	**41,392**	**649**	**2%**

Note: Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying, Oil & Gas Extraction; Utilities; and Wholesale Trade categories were omitted due to nondisclosure policies at BLS.

Source: Bureau of Labor Statistics, Garner Economics

Industry Earnings

A comparison of Charles County's average industry earnings to national averages offers insights into areas of unique expertise and cost-saving opportunities. Overall, the average earnings per job in Charles County of $46,280 is 19% below the national average of $57,266. Earnings in the County are below national averages for all major employment sectors except *Government which is* 18.8% higher and *Construction* 1.6% higher (Table 6.2 and Figure 6.2). *Arts, Entertainment & Recreation* and *Information* sectors were significantly lower than the national average, by 65.3% and 46.6% respectively.

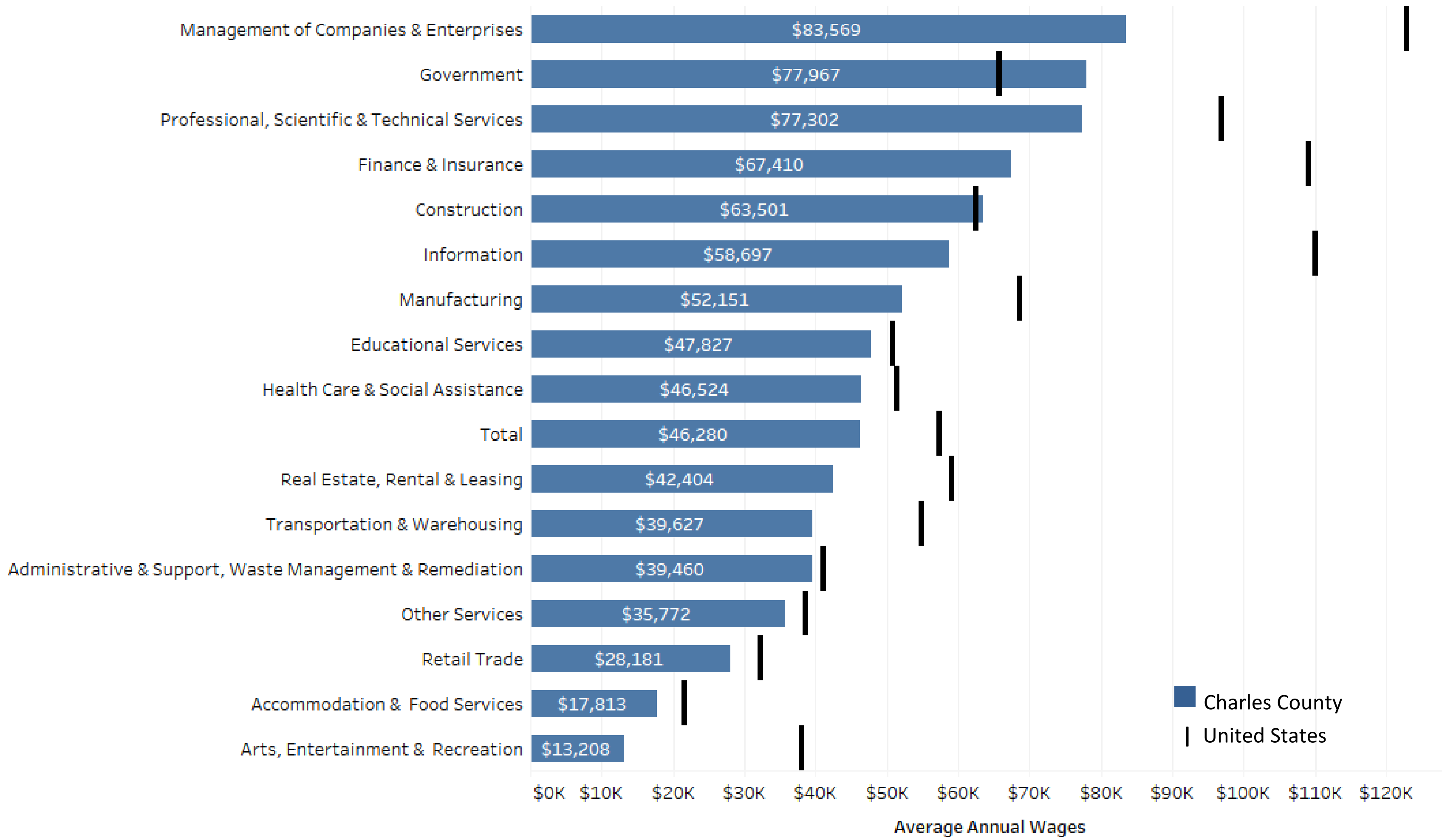
Table 6.2
2018 Average Annual Industry Salary Comparison

Description	Charles County	United States	Percent Difference
Management of Companies & Enterprises	$83,569	$122,843	-32.0%
Government	$77,967	$65,653	18.8%
Professional, Scientific & Technical Services	$77,302	$96,941	-20.3%
Finance & Insurance	$67,410	$109,130	-38.2%
Construction	$63,501	$62,494	1.6%
Information	$58,697	$109,992	-46.6%
Manufacturing	$52,151	$68,582	-24.0%
Educational Services	$47,827	$50,903	-6.0%
Health Care & Social Assistance	$46,524	$51,492	-9.6%
Real Estate, Rental & Leasing	$42,404	$58,955	-28.1%
Transportation & Warehousing	$39,627	$54,808	-27.7%
Administrative & Support, Waste Management & Remediation	$39,460	$41,046	-3.9%
Other Services	$35,772	$38,534	-7.2%
Retail Trade	$28,181	$32,359	-12.9%
Accommodation & Food Services	$17,813	$21,672	-17.8%
Arts, Entertainment & Recreation	$13,208	$38,065	-65.3%
All Industry	**$46,280**	**$57,266**	**-19.2%**

Note: Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying, Oil & Gas Extraction; Utilities; and Wholesale Trade categories were omitted due to nondisclosure policies at BLS.

Source: Bureau of Labor Statistics, Garner Economics

Figure 6.2
2018 Average Annual Industry Salary Comparison



Note: Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying, Oil & Gas Extraction; Utilities; and *Wholesale Trade* categories were omitted due to nondisclosure policies at BLS.

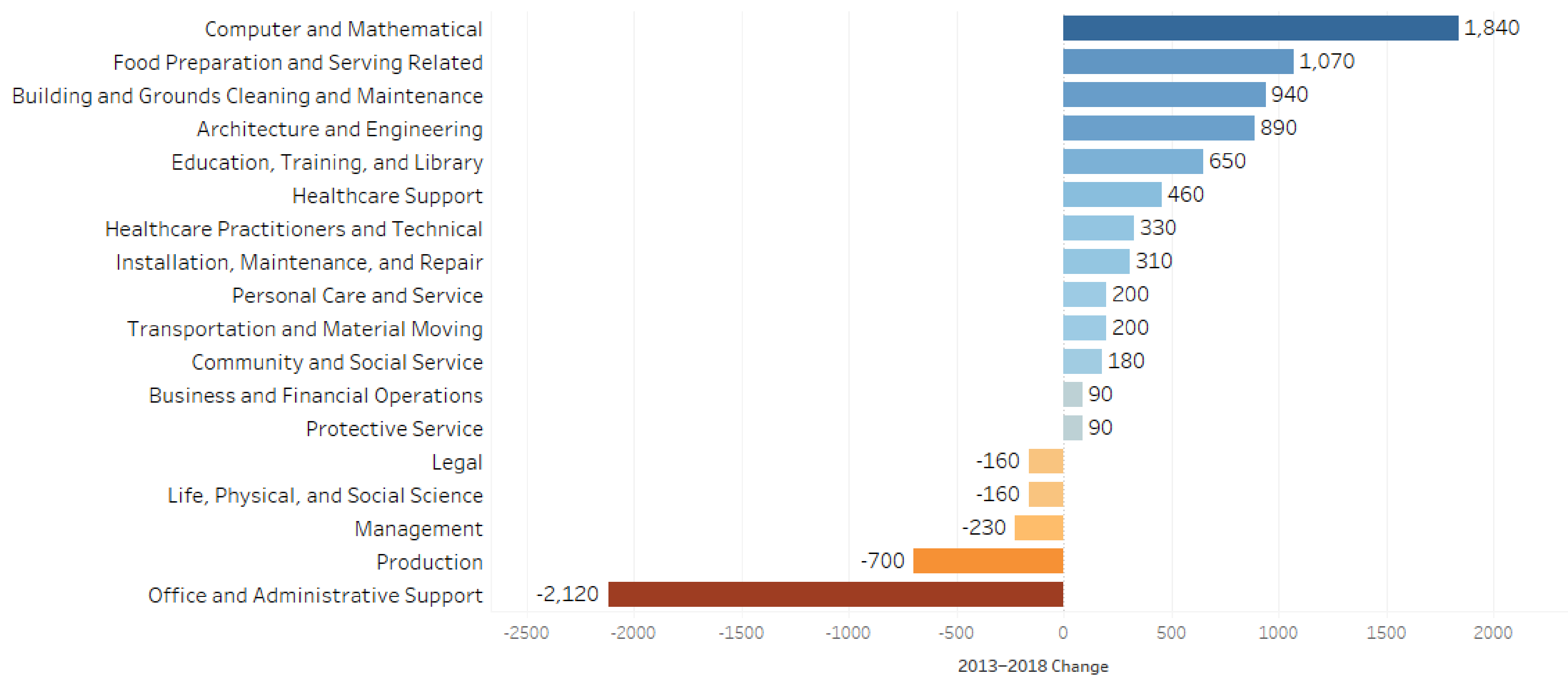
Source: Bureau of Labor Statistics, Garner Economics

Major Occupational Change

Jobs in *Computer and Mathematical Occupations* saw the most growth over the last five years increasing by 1,840 in the Southern Maryland Workforce Region, the smallest region available for this data (Figure 6.3, Table 6.3). The Southern Maryland Workforce Region consists of Calvert, Charles, and St. Mary's Counties. Other strong job gains were in the categories of *Food Preparation and Serving Related* (+ 1,070); *Building and Grounds Cleaning and Maintenance* (+ 940); *Architecture and Engineering* (+ 890); and *Education, Training, and Library* (+ 650).

Several categories experienced job losses, but *Office and Administrative Support* occupations had the largest loss of 2,120 jobs. Other occupational categories with sizable job losses include *Production* (-700) and *Management* (-230).

Figure 6.3
2013–2018 Employment Change by Occupational Group
Southern Maryland Workforce Region



Note: Forestry, Fishing & Hunting Occupations were omitted due to nondisclosure policies.

Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, Garner Economics

Table 6.3
Employment Change by Major Occupational Groups
Southern Maryland Workforce Region
(Ranked by Absolute Change)

Description	2013 Jobs	2018 Jobs	Job Change 2013–2018	% Change 2013–2018
Computer and Mathematical	4,610	6,450	1,840	39.9%
Food Preparation and Serving Related	11,600	12,670	1,070	9.2%
Building and Grounds Cleaning and Maintenance	2,220	3,160	940	42.3%
Architecture and Engineering	6,450	7,340	890	13.8%
Education, Training, and Library	12,860	13,510	650	5.1%
Healthcare Support	2,680	3,140	460	17.2%
Healthcare Practitioners and Technical	5,610	5,940	330	5.9%
Installation, Maintenance, and Repair	6,410	6,720	310	4.8%
Personal Care and Service	3,920	4,120	200	5.1%
Transportation and Material Moving	5,350	5,550	200	3.7%
Community and Social Service	1,440	1,620	180	12.5%
Business and Financial Operations	8,090	8,180	90	1.1%
Protective Service	2,000	2,090	90	4.5%
Arts, Design, Entertainment, Sports, and Media	860	920	60	7.0%
Construction and Extraction	5,360	5,370	10	0.2%
Sales and Related	12,980	12,940	-40	-0.3%
Life, Physical, and Social Science	810	650	-160	-19.8%
Legal	680	520	-160	-23.5%
Management	5,800	5,570	-230	-4.0%
Production	2,620	1,920	-700	-26.7%
Office and Administrative Support	16,970	14,850	-2,120	-12.5%
Total All Occupations	**119,380**	**125,130**	**5,750**	**4.8%**

Note: Forestry, Fishing & Hunting Occupations were omitted due to nondisclosure policies.

Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, Garner Economics

Occupational Earnings

A comparison of the same-occupation average annual earnings for the Charles County area to the national average wage revealed that a little over half of the pay levels are higher than national averages (Figure 6.4, Table 6.4).

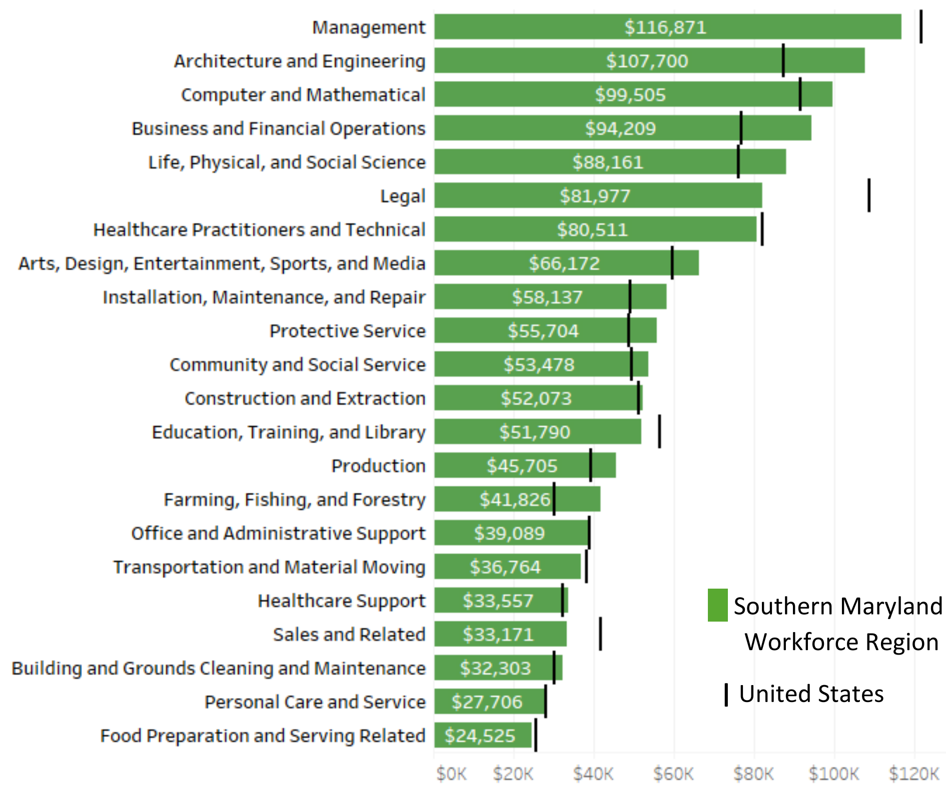
Occupations paying significantly higher than national rates in 2018 included:

- *Farming, Fishing, and Forestry* (27.9%)
- *Architecture and Engineering (18.9%)*
- *Business and Financial Operations* (18.4%)
- *Installation, Maintenance, and Repair* (15.8%)
- *Production* (14.3%)
- *Life, Physical, and Social Science* (13.6%)
- *Protective Service* (12.8%)

Sales and Related occupations in Southern Maryland pay 26% under national levels and *Legal* occupations are 32.6% under national averages.

Overall, the annual average wage for the Southern Maryland Workforce Region was $54,347 compared to the United States' annual average wage of $51,960. This is 4.4% higher than the national level.

Figure 6.4
2017 Average Hourly Occupational Earnings Comparison



Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, Garner Economics

Table 6.4
2018 Average Annual Occupational Earnings Comparison

SOC	Description	Regional	United States	Percent Difference
11-0000	Management	$116,871	$121,560	-4.0%
17-0000	Architecture and Engineering	$107,700	$87,370	18.9%
15-0000	Computer and Mathematical	$99,505	$91,530	8.0%
13-0000	Business and Financial Operations	$94,209	$76,910	18.4%
19-0000	Life, Physical, and Social Science	$88,161	$76,160	13.6%
23-0000	Legal	$81,977	$108,690	-32.6%
29-0000	Healthcare Practitioners and Technical	$80,511	$82,000	-1.8%
27-0000	Arts, Design, Entertainment, Sports, and Media	$66,172	$59,780	9.7%
49-0000	Installation, Maintenance, and Repair	$58,137	$48,960	15.8%
33-0000	Protective Service	$55,704	$48,580	12.8%
21-0000	Community and Social Service	$53,478	$49,280	7.8%
47-0000	Construction and Extraction	$52,073	$51,220	1.6%
25-0000	Education, Training, and Library	$51,790	$56,620	-9.3%
51-0000	Production	$45,705	$39,190	14.3%
45-0000	Farming, Fishing, and Forestry	$41,826	$30,140	27.9%
43-0000	Office and Administrative Support	$39,089	$38,990	0.3%
53-0000	Transportation and Material Moving	$36,764	$38,290	-4.2%
31-0000	Healthcare Support	$33,557	$32,380	3.5%
41-0000	Sales and Related	$33,171	$41,790	-26.0%
37-0000	Building and Grounds Cleaning and Maintenance	$32,303	$30,020	7.1%
39-0000	Personal Care and Service	$27,706	$28,090	-1.4%
35-0000	Food Preparation and Serving Related	$24,525	$25,580	-4.3%
11-0000	Management	$116,871	$121,560	-4.0%
17-0000	Architecture and Engineering	$107,700	$87,370	18.9%
	Total All Occupations	**$54,347**	**$51,960**	**4.4%**

Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, Garner Economics

Specialization, Competitiveness & Growth

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

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

Chart axis definitions:

- **Specialization**: Measured using location quotient (LQ). Reflects the level of relative concentration of a particular occupation/industry to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.
- **Industry Effect:** The portion of growth/decline attributed to a particular industry nationwide. For example, if hospital employment grew by 5% nationwide in 2011, we would expect to see the same percentage increase locally, assuming that the forces driving nationwide growth would have a similar local impact.
- **Local Effect:** The proportion of growth/decline not captured by the industry effect, indicating unique local performance. The local effect measures local activity outside the expected nationwide trend. A consistent positive local competitive effect signals superior local performance.

Chart quadrant label definitions:

At-Risk: Locally specialized and recent local job losses.

Competitive: Locally specialized and recent local job gains.

Declining: Not locally specialized and recent local job losses.

Emerging: Not locally specialized and recent local job gains.

- **Local Decline/National Growth:** Industry or occupation gains nationwide and local losses or gains below nationwide trend.
- **Local Growth/National Growth:** Industry or occupation gains nationwide and positive local gains or losses less than nationwide trend.
- **Local Growth/National Decline:** Industry or occupation losses nationwide and positive local gains or losses less than nationwide trend.
- **Local Decline/National Decline:** Industry or occupation losses nationwide and local losses or gains below nationwide trend.

Detailed industry and occupational information can be found in the Appendices.

Major Industry Sector Specialization & Growth

Table 6.5
Industry Specialization & Growth

Industry Sector	2013–2018 Employment Change	2018 Jobs	2018 Location Quotient
Competitive			
Construction	392	3,870	1.9
Government	197	4,372	2.1
Educational Services	188	5,369	1.5
Other Services	167	1,577	1.2
Accommodation & Food Services	131	5,157	1.3
Emerging			
Health Care & Social Assistance	447	5,234	0.9
Administrative & Support & Waste Management & Remediation	270	1,257	0.5
Transportation & Warehousing	96	1,428	0.8
Management of Companies & Enterprises	78	233	0.4
Manufacturing	16	621	0.2
Arts, Entertainment & Recreation	11	471	0.6
At-Risk			
Retail Trade	-687	7,630	1.7
Declining			
Real Estate, Rental & Leasing	-32	434	0.7
Information	-43	301	0.4
Finance & Insurance	-49	646	0.4
Professional, Scientific & Technical Services	-338	1,687	0.6

Note: Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying, Oil & Gas Extraction; Utilities; and *Wholesale Trade categories were omitted due to nondisclosure policies at BLS.*

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

Five industries sectors have a local specialization at 1 or above and experienced job growth in the past five years in Charles County. These comprise the *Competitve* category and are:

- *Construction* (LQ 1.9)
- *Government* (LQ 2.1)
- *Educational Services* (LQ 1.5)
- *Other Services* (LQ 1.2)
- *Accommodation & Food Services* (LQ 1.3)

Industries with local specialization below 1 but with job growth within the County over the past five years places them in the *Emerging* category. These include *Health Care & Social Assistance; Administrative, Support, Waste Management & Remediation*; *Transportation & Warehousing; Management of Companies*; *Manufacturing;* and *Arts, Entertainment & Recreation* (Table 6.5; Figure 6.5).

The *At-Risk* category includes industry sectors that had job growth and an LQ higher than 1. Only *Retail Trade* with a job loss of 687 and LQ of 1.7 lands in this category.

The remaining four sectors that had data available are classified as *Declining* due to job loss and low local specialization.

Source: Bureau of Labor Statistics, Garner Economics

Figure 6.5
Industry Specialization & Growth

Source: Bureau of Labor Statistics, Garner Economics

Occupational Specialization & Growth

Table 6.6
Occupational Specialization and Growth, 2013–2018

Description	2013–2018 Change	2018 Location Quotient	2018 Jobs
Competitive			
Computer and Mathematical	1,840	1.7	6,450
Food Preparation and Serving Related	1,070	1.1	12,670
Architecture and Engineering	890	3.3	7,340
Education, Training, and Library	650	1.8	13,510
Installation, Maintenance, and Repair	310	1.4	6,720
Business and Financial Operations	90	1.2	8,180
Construction and Extraction	10	1.0	5,370
Emerging			
Building and Grounds Cleaning and Maintenance	940	0.8	3,160
Healthcare Support	460	0.9	3,140
Healthcare Practitioners and Technical	330	0.8	5,940
Personal Care and Service	200	0.9	4,120
Transportation and Material Moving	200	0.6	5,550
Community and Social Service	180	0.9	1,620
Protective Service	90	0.7	2,090
Arts, Design, Entertainment, Sports, and Media	60	0.5	920
Declining			
Sales and Related	-40	1.0	12,940
Life, Physical, and Social Science	-160	0.6	650
Legal	-160	0.5	520
Management	-230	0.8	5,570
Production	-700	0.2	1,920
Office and Administrative Support	-2,120	0.8	14,850

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors. Occupational data was available at the regional level covering the Southern Maryland Workforce area including the counties of Calvert, Charles, and St. Mary.

Seven occupational groups have location quotients at 1 or more and experienced some employment growth recently and are considered *Competitive*:

- *Computer and Mathematical* (LQ 1.7)
- *Food Preparation and Serving Related* (LQ 1.1)
- *Architecture and Engineering* (LQ 3.3)
- *Education, Training, and Library* (LQ 1.8)
- *Installation, Maintenance, and Repair* (LQ 1.4)
- *Business and Financial Operations* (LQ 1.2)
- *Construction and Extraction* (LQ 1.0)

Eight occupational categories saw employment gains over the past five years but have concentrations (LQs) under 1. These *Emerging* sectors are:

- *Building, Grounds Cleaning, and Maintenance*
- *Healthcare Support*
- *Healthcare Practitioners and Technical*
- *Personal Care and Service*
- *Transportation and Material Moving*
- *Community and Social Service*
- *Protective Service*
- *Arts, Design, Entertainment, Sports, and Media*

There were no occupational groups considered *At-Risk* and six categories were considered *Declining* or having employment loss/no change along with local specialization under 1.

Source: Bureau of Labor Statistics, Garner Economics

Figure 6.7
Occupational Specialization & Growth
Occupational Groups with 2018 Employment of Approximately 1,000 and Above

Source: Bureau of Labor Statistics, Garner Economics

Chapter 7: Optimal Business Targets for Charles County

The optimal business sectors selection is based on the specific characteristics of the economy and assets of Charles County. These recommended targets are designed to assist the County and its economic development organization in prioritizing resources and focusing on sectors in which the County holds a competitive advantage and/or has significant growth potential. This approach will help policymakers prioritize the County's community and economic development strategy.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins by considering the types of business sectors that stakeholders of Charles County would like to see in the community (Figure 7.1). Feasibility includes what the area can reasonably achieve in the short- to mid-term based on current or planned locational assets and on an analytical review of the regional economy.

Using results from the previously completed COMPETITIVE REALITIES REPORT, a community survey, and field visits, business and industry sectors were verified, and one new business target was added to best match Charles County's unique competitive advantages. Garner Economics recommended four targets in 2015–2016 which are still part of the current economic development strategy. These were verified and renamed to address different audiences and national trends and are: **Federal Contracting, Tech & Professional Services, Entrepreneurship & Experiential Retail, Value-added Agribusiness**, and **Health Services.** Value-added Agribusiness is the new target added to this mix.

For each targeted business sector, the community's competitive advantages are presented, along with national trends and projections of the targets. In some cases, target sectors are flat or actually losing jobs nationally, but the particular set of economic development assets in Charles County position it to capture any growing demand.

For each target, a list of individual subsectors is provided with accompanying NAICS classifications. Also, each target profile contains a bulleted list of rationales that are presented and identified as appealing to the needs of **prospects (P)** or the **community (C)**. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

Figure 7.1:
Optimal Target
Screening Process

Optimal Targets

1. Federal Contracting
2. Tech & Professional Services
3. Entrepreneurship & Experiential Retail
4. Value-added Agribusiness
5. Health Services

FIGURE 7.2: OPTIMAL TARGETS FOR CHARLES COUNTY, MARYLAND

Federal Contracting	Tech & Professional Services	Entrepreneurship & Experiential Retail	Value-added Agribusiness	Health Services
VERIFIED ▸ SIMILAR SUBSECTORS, DIFFERENT AUDIENCES		*VERIFIED ▸ UPDATED*	*NEW TARGET*	*VERIFIED*
⬇	⬇	⬇	⬇	⬇
• Scientific Research and Development Services • Management, Scientific, and Technical Consulting Services • Engineering and Related Services • Facilities Support Services • Business Support Services • Electronic and Precision Equipment Repair and Maintenance • Navigational, Measuring, and Control Instrument Manufacturing • Computer Systems Design and Related Services	• Management of Companies and Enterprises • Architectural, Engineering, and Related Services • Accounting, Tax Preparation, Bookkeeping, and Payroll Services • Software Publishers • Computer Systems Design and Related Services • Data Processing, Hosting, and Related Services • Internet Publishing and Broadcasting and Web Search Portals • Office Administration and Business Support Services	• Co-Working and Remote Office Centers • Local or Unique/ Boutique Retail • Restaurants and Other Eating and Drinking Places • Specialty Food Stores	• Value-added Agriculture Operations • Hydroponics/ Greenhouse Crops • Aquaculture • Breweries, Distilleries, and Wineries • Grocery, Farm, and Specialty Product Wholesalers • Farm Machinery Manufacturing	• Offices of Physicians, Dentists, and Other Health Practitioners • Health Services Educational Institutions • Outpatient Care Centers • Medical and Diagnostic Laboratories • Home Health Care Services • Nursing and Residential Care Facilities

Target: Federal Contracting

A part of the Washington Metro, Charles County has the opportunity to serve many governmental agencies located in the District of Columbia, Baltimore, and throughout the region. As a lower-cost market, the County is well-positioned for growth among firms that support the federal government.

The Washington Metro is well established as the top location in the United States for doing business with the federal government in research & development, engineering, management consulting, cybersecurity, facilities management, and other sectors. Major federal and military operations in Charles County include the Naval Support Facility (NSF) Indian Head with multiple commands and a new Army Reserves Center. Joint Base Andrews is also located in the area, just to the north of Waldorf, and Naval Support Facility Dahlgren is across the Potomac River in Virginia via U.S. Highway 301.

The Velocity Center development by the College of Southern Maryland will provide space and supporting partnerships for innovations and collaborations with the Navy. Located outside the Navy base in Indian Head, this facility is designed to support technology transfers and boost entrepreneurial activity.

A 2019 impact study of Naval Support Facilities shows NSF Indian Head had $55 million in local contracts and NSF Dahlgren had $472 million in local contracts. These amounts represent 10% and 17% of the total contracts respectively. SAIC (Science Applications International Corporation) has a strong history of serving federal agencies and is one company already located in Charles County.

Several subsectors target the manufacture of technical equipment, such as electronic and precision equipment or navigational and measuring control instruments to support activity in the scientific R&D field associated with federal contracting opportunities.

Charles County offers better efficiencies with lower-cost labor and relatively more affordable cost of living to attract firms to locate outside the beltway. Talent exists in the County, and there is opportunity to retain existing residents that commute outside the County for work. In 2018, more than 50,000 residents commuted to jobs elsewhere.

Federal Contracting Rationales

- Centrally located for national, and international markets (P) (C)
- Proximity to Washington and Baltimore markets (P) (C)
- Proximity to regional and international airports (P)
- Presence of Indian Head and access to other military sites (P)
- Availability of managerial personnel (P)
- Availability of postsecondary vocational training (P)
- Within 1 hour of major university/college
- Affordable cost of labor (P)
- Opportunity to leverage presence of retired military, government, and contractor personnel (C)
- Opportunity to attract/retain large base of high-wage earners who presently out-commute (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Federal Contracting Rationales
(continued)

- Increasing employment and emerging specialization in the *Administrative & Support, Waste Management & Remediation Services* sector (P)
- Increasing employment and specialization in the *Computer & Mathematical; Architecture & Engineering*; as well as *the Installation, Maintenance & Repair* industries (P)
- Relatively affordable cost of living (P) (C)
- Good quality of life (P) (C)
- Abundant cultural and recreational opportunities (P) (C)
- 7,017 degrees and certificates granted in majors related to target (P)
- Historical national job growth of 18% for past decade (P)(C)
- National job growth forecast of 17% (P)(C)
- National average wage: $91,142 (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

The talent pipeline is developing via area schools including the College of Southern Maryland (CSM) located in Charles County. Within the region, colleges and universities have awarded more than 7,000 degrees and credentials (Table 7.3). Top degrees obtained in 2018 include *Business, Management and Marketing* (2,903 degrees); *Engineering* (1,931 degrees) and *Computer and Information Sciences* (1,269 degrees). The national trend toward "new collar jobs or those jobs that don't require a traditional four-year degree are present in this target. The presence of CSM and other community colleges in the area support a variety of options to earn credentials for "new collar" jobs such as cybersecurity.

Table 7.3: Regional Degree Completions in Majors Related to Target, 2018

Program/Major	Degrees Granted
Business, Management, Marketing, and Related Support Services	2,903
Engineering	1,931
Computer and Information Sciences and Support Services	1,269
Communication, Journalism, and Related Programs	519
Public Administration and Social Service Professions	200
Mechanic and Repair Technologies/Technicians	84
Homeland Security, Law Enforcement, Firefighting, and Related Protective Service	74
Engineering Technologies and Engineering-related Fields	37
Total	**7,017**

Graduates from the following schools are included: University of Maryland-College Park, Prince George's Community College, College of Southern Maryland, Strayer University-Maryland, Gallaudet University, Fortis College-Landover, DeVry University-Virginia, Divine Mercy University, CET-Alexandria, University of Phoenix-Washington DC, and Saint Michael College of Allied Health

Source: National Center for Education Statistics, Garner Economics

Table 7.4: Federal Contracting Target Subsectors

NAICS	Description	2018 National Employment	2008–2018 National Job Growth	2018–2028 National Job Growth Forecast	2018 National Average Annual Wage
5413	Architectural, Engineering, and Related Services	1,544,339	0.0%	9.9%	$87,555
5415	Computer Systems Design and Related Services	2,241,118	40.0%	22.3%	$109,911
5416	Management, Scientific, and Technical Consulting Services	1,774,811	38.8%	23.3%	$84,690
5417	Scientific Research and Development Services	684,896	7.3%	14.5%	$133,669
5612	Facilities Support Services	152,143	10.5%	16.7%	$50,434
5614	Business Support Services	970,485	7.1%	13.6%	$41,474
33451	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	404,455	-9.0%	-3.6%	$103,417
81121	Electronic and Precision Equipment Repair and Maintenance	127,971	-2.6%	1.6%	$53,857
	WEIGHTED AVERAGES/TOTALS	**7,900,218**	**18.2%**	**16.6%**	**$91,142**

Certain subsectors included in target matrix (Figure 7.2) have different naming than NAICS code subsector and the business activity falls under NAICS listed above.

Source: EMSI, Garner Economics

Importance of skills transferability:

At a time when most areas are near full employment, existing employment in high-demand occupations is key in marketing to targeted industries (Table 7.5). In addition to these needed positions for the Federal Contracting target family, there are other occupations that have similar skills to those listed in Table 7.5. Skills of the workforce have grown even more important for employers – both existing industry and relocating firms. A federal database (O*Net) provides crosswalks of skills that can be transferred to other jobs. A sample of several high-demand positions and transferability of their skills from other jobs is shown to the right.

Table 7.5: Employment in High-Demand Occupations
Southern Maryland, 2018

Description	2018 Jobs
Business Operations Specialists	6,280
Information & Record Clerks	3,590
Customer Service Representatives	1,590
Logisticians	1,380
Maintenance & Repair Worker	1,080
Electronics Engineers	900
Electrical and Electronics Engineering Technicians	640
Accountants & Auditors	500
Computer Hardware Engineers	490
Assemblers & Fabricators	240
Financial Analysts	220
Computer Programmers	180
Compliance Officers	170
Database Administrators	170
Office and Administrative Support Workers, All Other	90
Mechanical Engineers	90
Inspectors, Testers, Sorters, Samplers, and Weighers	80
Web Developers	50

Source: Maryland Department of Labor,
*Southern Maryland Workforce Region Data, O*Net, Garner Economics*

Skills Transferability for Sample
Federal Contracting Occupations

Accountants & Auditors

Multiple occupations including:

- Investment Fund Manager
- Survey Researcher
- Loan Interviewer & Clerk
- Energy Broker
- Retail Supervisor
- Fundraiser

Maintenance & Repair Workers

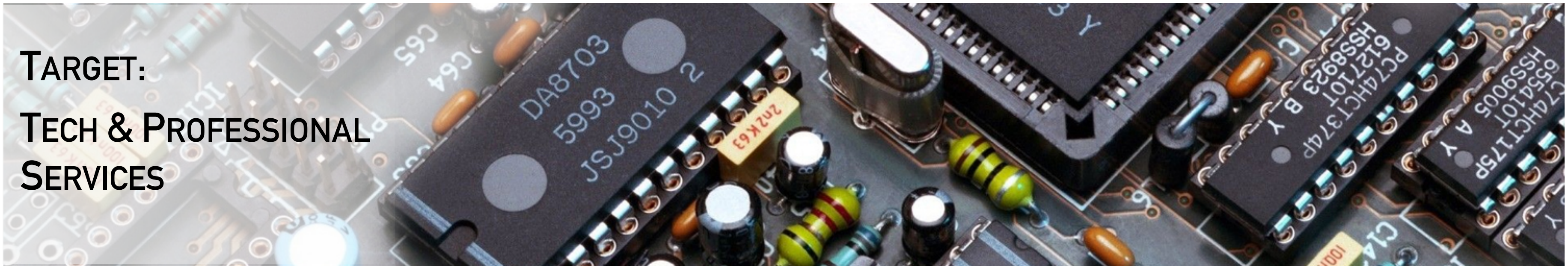
Multiple occupations including:

- Outdoor Power Equipment and Small Engine Mechanic
- Photographic Process Worker
- Electronic Equipment Installer
- Installation Helper
- Automotive Technician
- Molding and Casting Worker
- Print Binding and Finishing Worker

Source: EMSI, Garner Economics

Occupations with compatible index of 90 or above earning less than target occupation

Target: Tech & Professional Services



The *Tech & Professional Services* target group is very similar to the *Federal Contracting* target with a major difference—the audience. While the *Federal Contracting* target has specific customers in federal government and military activities and facilities, this target is aimed toward a broader target with private corporations. Both targets include consulting services, engineering services, IT, and business support services subcategories. However, *Tech & Professional Services* also incorporates functions such as accounting, data processing, data centers, and software publishers as well as office administration and business support services.

Once again, this target aims to capitalize on Charles County's skilled and educated workforce and interrupt commuting workers by providing quality jobs closer to home. There are a multitude of studies that describe a shift by many workers to jobs with less commuting, sometimes even with a slight pay cut, to achieve a higher quality of life. With digital transactions, virtual workplaces, and teleworking becoming the norm for many companies, lower-cost areas close to Washington are poised to attract smaller businesses and/or startups from this cluster.

Tech & Professional Services has a strong national outlook with an employment growth rate of 23% from 2008 to 2018 and a projected increase of an additional 17% in the coming decade. Computer systems design, application development, data processing and hosting, as well as internet publishing are all growing rapidly. The high wages paid by these industry sectors make them a particularly attractive target.

The County is poised to attract businesses that provide goods and services that support or complement the professional services economy in the Washington Metro. As a whole, the region is pulling in businesses—even the most coveted headquarters announcement (Amazon's HQ2) of the last decade is less than an hour away. In a booming metro, Charles County's proximity and relatively lower cost of labor have great appeal.

Tech & Professional Services Rationales

- Centrally located for national and international markets (P) (C)
- Proximity to Washington and Baltimore markets (P) (C)
- Proximity to international airports (P)
- Availability of managerial personnel (P)
- Availability of technicians and scientists (P)
- Availability of postsecondary vocational training (P)
- Within 1 hour of major university/college
- Affordable cost of labor (P)
- Opportunity to leverage presence of retired military, government, and contractor personnel (C)
- Opportunity to attract/retain large base of high-wage earners who presently out-commute (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Tech & Professional Services Rationales
(continued):

- Increasing employment and emerging specialization in the *Administrative & Support, Waste Management & Remediation Services* sector (P)
- Increasing employment and specialization in the *Computer & Mathematical; Architecture & Engineering*; as well as *the Installation, Maintenance & Repair* industries (P)
- Relatively affordable cost of living (P) (C)
- Good quality of life (P) (C)
- Abundant cultural and recreational opportunities (P) (C)
- 6,980 degrees and certificates granted in majors related to target (P)
- Historical national job growth of 23% for past decade (P)(C)
- National job growth forecast of 17% (P)(C)
- National average wage: $98,210 (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Within the region, colleges and universities have awarded more than 6,900 degrees and credentials (Table 7.6). Top degrees obtained in 2018 include *Business, Management and Marketing* (2,903 degrees); *Engineering* (1,931 degrees); and *Computer and Information Sciences* (1,269 degrees). The *Tech & Professional Services* target is also likely to utilize credentials outside the normal four-year degree particularly in fast-developing technology and application development.

Table 7.6: Regional Degree Completions in Majors Related to Target, 2018

Program/Major	Degrees Granted
Business, Management, Marketing, and Related Support Services	2,903
Engineering	1,931
Computer and Information Sciences and Support Services	1,269
Communication, Journalism, and Related Programs	519
Mathematics and Statistics	298
Engineering Technologies and Engineering-related Fields	37
Legal Professions and Studies	23
Total	**6,980**

Graduates from the following schools are included: University of Maryland-College Park, Prince George's Community College, College of Southern Maryland, Strayer University-Maryland, Gallaudet University, Fortis College-Landover, DeVry University-Virginia, Divine Mercy University, CET-Alexandria, University of Phoenix-Washington DC, and Saint Michael College of Allied Health

Source: National Center for Education Statistics, Garner Economics

Table 7.7: Tech & Professional Services Target Subsectors

NAICS	Description	2018 Employment	2008–2018 National Job Growth	2018–2028 National Job Growth Forecast	2018 National Average Annual Wage
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,180,557	6.2%	9.2%	$69,312
5413	Architectural, Engineering, and Related Services	1,544,339	0.0%	9.9%	$87,555
5415	Computer Systems Design and Related Services	2,241,118	40.0%	22.3%	$109,911
5416	Management, Scientific, and Technical Consulting Services	1,774,811	38.8%	23.3%	$84,690
5511	Management of Companies and Enterprises	2,311,127	21.9%	9.4%	$121,951
5611	Office Administrative Services	530,297	27.5%	23.6%	$84,973
5614	Business Support Services	970,485	7.1%	13.6%	$41,474
51121	Software Publishers	391,122	49.2%	22.6%	$163,085
51821	Data Processing, Hosting, and Related Services	329,857	24.6%	16.7%	$115,985
56111	Office Administrative Services	530,297	27.5%	23.6%	$84,973
519130	Internet Publishing and Broadcasting and Web Search Portals	246,481	178.0%	50.2%	$225,359
	WEIGHTED AVERAGES/TOTALS	**12,050,491**	**23.2%**	**17.0%**	**$98,210**

Certain subsectors included in target matrix (Figure 7.2) have different naming than NAICS code subsector and the business activity falls under NAICS listed above.

Source: EMSI, Garner Economics

Importance of skills transferability:

At a time when most areas are near full employment, existing employment in high-demand occupations is key in marketing to targeted industries (Table 7.5). In addition to these needed positions for the Tech and Professional Services target, there are other occupations that have similar skills to those listed in Table 7.5. Skills of the workforce have grown even more important for employers – both existing industry and relocating firms. A federal database (O*Net) provides crosswalks of skills that can be transferred to other jobs. A sample of several high-demand positions and transferability of their skills from other jobs is shown to the right.

Table 7.8: Employment in High-Demand Occupations
Southern Maryland, 2018

Description	2018 Jobs
General and Operations Managers	1,700
Computer Systems Analysts	1,230
Mechanical Engineers	950
Electronics Engineers, Except Computer	900
Network and Computer Systems Administrators	750
Software Developers, Systems Software	740
Electrical Engineers	640
Electrical and Electronics Engineering Technicians	640
Computer Occupations, All Other	620
Accountants & Auditor	500
Computer and Information Systems Managers	350
Software Developers, Applications	300
Computer Network Support Specialists	300
Architectural and Engineering Managers	280
Information Security Analysts	260
Financial Analysts	220
Computer Programmers	180
Database Administrators	170
Office and Administrative Support Workers, All Other	90
Web Developers	50

*Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, O*Net, Garner Economics*

Skills Transferability for Sample Tech & Professional Services Occupations

Computer Network Architect

Multiple occupations including:

- Remote Sensing Technician
- Web Developer
- Electrical Engineering Technologist
- Industrial Engineering Technologist/Technician
- Computer Network Support Specialist
- Security Management Specialist
- Logistics Analyst

Information Security Analyst

Multiple occupations including:

- Web Developer
- Compliance Manager
- Claims Examiners, Property & Casualty Insurance
- Clinical Data Manager
- Logistics Analyst
- Loan Interviewer and Clerk
- Computer User Support Specialist

Source: EMSI, Garner Economics

Occupations with compatible index of 90 or above earning less than target occupation

Target: Entrepreneurial & Experiential Retail

The *Entrepreneurial & Experiential Retail* target focuses on activities supporting the growth of startup businesses and creating a sense of place in Charles County with unique retail offerings. Entrepreneurial activity is the economic gardening approach to economic development that seeks to grow from within Charles County's existing residents and businesses. This can be startup companies but can also broaden its view attracting the mobile entrepreneur—the worker who can operate anywhere with a good internet connection. Among the 50,000 commuters who leave the County every day, many may be entrepreneurs-in-waiting, and others may be able and interested in working out of shared office space or co-working facilities.

A newer trend is the emergence of makerspaces that focus on collaboration and creation stocked with tools from a high-tech 3D printer to the more traditional woodworking tools. The Velocity Center development is an excellent addition to the entrepreneurial ecosystem of Charles County. The development includes a makerspace (accelerMake) and RocketPods office space.

Experiential Retail describes the growing trend in brick and mortar retail to enhance customer experience. With many traditional retail establishments suffering the impact of shifting e-commerce activity, retailers today look to have immersive, interactive, or technology-enhanced stores. Extreme examples feature a pool filled with sprinkles you can dive into (Museum of Ice Cream) and a full basketball court inside the Nike store in Soho. The more realistic version, for most communities, is featuring unique goods/services/activity—such as ax throwing or an exclusive environment worthy of Instagram selfies. Subtargets include specialty food stores, full-service restaurants and drinking places, used merchandise, and pet supply stores. Current projects like the Waldorf Urban Redevelopment Corridor and the Waldorf Station project along U.S. 301 will offer opportunity for new retail concepts. The design of Waldorf Station exudes greenspace, which will dovetail nicely into an experiential environment.

Entrepreneurial & Experiential Retail Rationales

- Proximity to Washington and Baltimore markets (P) (C)
- Local and regional traffic along U.S. Route 301 (P)
- High median household income level (P)
- Proximity to international airports (P)
- Availability of managerial personnel (P)
- Affordable cost of labor (P)
- Availability of postsecondary vocational training (P)
- High rate of employment growth in *Accommodation & Food Services* sector (P)
- Entrepreneurship opportunities for local residents (C)
- Opportunity to attract/retain large base of high-wage earners who presently out-commute (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Entrepreneurial &
Experiential Retail Rationales
(continued):

- Affordable cost of living (P) (C)
- Good quality of life (P) (C)
- Abundant cultural and recreational opportunities (P) (C)
- 9,080 degrees and certificates granted in majors related to target (P)
- Historical national job growth of 17% for past decade (P)(C)
- National job growth forecast of 10% (P)(C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

The workforce for this target is either self-employed or workers who are mostly retail- and customer service-oriented. A variety of backgrounds and training can work in this sector. Nationally this sector grew its employment 17% over the past decade and is projected to add 10% more from 2018 to 2028. Creating a more interesting and unique retail atmosphere would greatly enhance the County's quality of place. This, in turn, affects the ability to retain and attract talent.

Table 7.9: Regional Degree Completions in Majors Related to Target, 2018

Program	Degrees Granted
Business, Management, Marketing, and Related Support Services	2,903
Liberal Arts and Sciences, General Studies and Humanities	2,109
Social Sciences	1,517
Computer and Information Sciences and Support Services	1,269
Communication, Journalism, and Related Programs	519
Visual and Performing Arts	302
Parks, Recreation, Leisure and Fitness Studies	266
Family and Consumer Sciences/Human Sciences	174
Total	**9,080**

Graduates from the following schools are included: University of Maryland-College Park, Prince George's Community College, College of Southern Maryland, Strayer University-Maryland, Gallaudet University, Fortis College-Landover, DeVry University-Virginia, Divine Mercy University, CET-Alexandria, University of Phoenix-Washington DC, and Saint Michael College of Allied Health

Source: National Center for Education Statistics, Garner Economics

Table 7.10: Entrepreneurial & Experiential Retail Target Subsectors

NAICS	Description	2018 Employment	2008–2018 National Job Growth	2018–2028 National Job Growth Forecast	2018 National Average Annual Wage
4452	Specialty Food Stores	244,288	-1.8%	1.9%	$25,754
4481	Clothing Stores	1,073,340	-7.9%	-8.6%	$20,638
4539	Other Miscellaneous Store Retailers	395,400	13.4%	16.3%	$30,135
7224	Drinking Places (Alcoholic Beverages)	400,274	10.0%	-2.4%	$18,967
7225	Restaurants and Other Eating Places	10,696,706	22.4%	12.2%	$18,902
45112	Hobby, Toy, and Game Stores	170,272	10.7%	5.9%	$18,363
45322	Gift, Novelty, and Souvenir Stores	164,626	-22.2%	-21.6%	$20,195
45331	Used Merchandise Stores	219,949	31.9%	24.2%	$20,587
45391	Pet and Pet Supplies Stores	124,711	18.7%	17.4%	$24,000
53112	Lessors of Nonresidential Buildings (office spaces/co-working)	204,301	3.6%	3.4%	$67,794
56143	Business Service Centers	83,792	-15.1%	-10.4%	$37,405
	WEIGHTED AVERAGES/TOTALS	**13,777,657**	**16.7%**	**9.6%**	**$20,402**

Certain subsectors included in target matrix (Figure 7.2) have different naming than NAICS code subsector and the business activity falls under NAICS listed above.

Source: EMSI, Garner Economics

Table 7.11: Employment in High-Demand Occupations
Southern Maryland, 2018

Description	2018 Jobs
Retail Salespersons	4,660
Cashiers	4,410
Waiters and Waitresses	2,750
First-Line Supervisors of Retail Sales Workers	1,700
Combined Food Preparation and Serving Workers, Including Fast Food	1,690
Cooks, Restaurant	1,390
First-Line Supervisors of Food Preparation and Serving Workers	1,130
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	940
Dishwashers	910
Bartenders	740
Food Preparation Workers	580
Maids and Housekeeping Cleaners	540
Dining Room and Cafeteria Attendants and Bartender Helpers	500
Amusement and Recreation Attendants	450
First-Line Supervisors of Housekeeping and Janitorial Workers	260
Food Service Managers	190
Property, Real Estate, and Community Association Managers	90

Source: Maryland Department of Labor,
Southern Maryland Workforce Region Data, Garner Economics

Target: Value-added Agribusiness

Charles County has more than 41,000 acres in farmland with the average farm size of 107 acres, according to the 2017 Census of Agriculture. Opportunity exists to leverage natural assets in the County on a value added level—small farms producing for local and regional distribution. Aquaculture and extended growing season greenhouse crops and hydroponics are several subsectors of this target. A great variety of product is being grown throughout the County.

Changes in the 2018 Farm Bill and Maryland legislature have opened up hemp production with fabrics, paper, and cannabinoid or CBD that can be derived from hemp. The passing of medical cannabis legislation in Maryland and consideration of additional cannabis use will continue to build on this type of agribusiness. A company that obtained one of the first processing licenses in the state is located in Charles County. FGM Processing operates a 7,500 square foot cannabis extraction site in the County.

Other components of this target include grocery, farm, and specialty product wholesalers to process and sell farm goods that are not sold directly to consumers. Another subsector is the manufacture of farm and process equipment. With hemp processing being a fairly new trade, machinery to use in the high-touch farming and processing of this product will also be a growth industry.

Goods made with farm product is included in this target. Establishments such as breweries, distilleries, and wineries are agricultural and can also fit into the experiential retail target. Patuxent Brewing Company opened the first craft brewery in Charles County earlier in 2019. Blue Dyer Distilling Company preceded this operation making rum, whiskey, and gin.

This target looks to develop agribusiness in a value added fashion with a smaller footprint in farms and in processing facilities.

Value-added Agribusiness Rationales

- Centrally located for national, and international markets (P) (C)
- Proximity to Washington and Baltimore markets (P) (C)
- University of Maryland Extension Center location in Charles County (P)
- Availability of postsecondary vocational training (P)
- Within 1 hour of major university/college
- Affordable cost of labor (P)
- Affordable cost of living (P) (C)
- Good quality of life (P) (C)
- Abundant cultural and recreational opportunities (P) (C)
- Affordable cost of living (P) (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Value-added Agribusiness Rationales

(continued):

- 5,913 degrees and certificates granted in majors related to target (P)
- Historical national job growth of 4% for past decade (P)(C)
- National job growth forecast of 2% (P)(C)
- National average wage: $37,258 (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Talent for the Value-added Agribusiness will need a variety of skills. In the 45-minute drive-time there were 5,913 degrees or certificates awarded for degrees associated with Agribusiness. Top degrees obtained in 2018 include *Business, Management and Marketing* (2,903 degrees) and *Engineering* (1,931 degrees). The University of Maryland-College Park offers several programs related to this target including *Agriculture and Resource Economics, Institute of Applied Agriculture, Environmental Science and Technology,* and *Environmental Science and Policy.*

Table 7.12: Regional Degree Completions in Majors Related to Target, 2018

Program	Degrees Granted
Business, Management, Marketing, and Related Support Services	2,903
Engineering	1,931
Communication, Journalism, and Related Programs	519
Agriculture, Agriculture Operations and Related Sciences	244
Family and Consumer Sciences/Human Sciences	174
Mechanic and Repair Technologies/Technicians	84
Engineering Technologies and Engineering-related Fields	37
Personal and Culinary Services	21
Total	**5,913**

Graduates from the following schools are included: University of Maryland-College Park, Prince George's Community College, College of Southern Maryland, Strayer University-Maryland, Gallaudet University, Fortis College-Landover, DeVry University-Virginia, Divine Mercy University, CET-Alexandria, University of Phoenix-Washington DC, and Saint Michael College of Allied Health

Source: National Center for Education Statistics, Garner Economics

Table 7.13: Value-added Agribusiness Target Subsectors

NAICS	Description	2018 Employment	2008–2018 National Job Growth	2018–2028 National Job Growth Forecast	2018 National Average Annual Wage
112	Animal Production and Aquaculture	431,384	-4.8%	-4.6%	$34,049
1110	Crop Production	812,902	-0.5%	1.4%	$31,395
31212	Breweries	73,937	178.6%	32.5%	$45,890
31213	Wineries	67,544	62.8%	13.8%	$45,006
31214	Distilleries	15,026	109.8%	24.4%	$67,179
333111	Farm Machinery and Equipment Manufacturing	59,209	-5.0%	9.9%	$62,157
424590	Other Farm Product Raw Material Merchant Wholesalers	8,519	-10.6%	0.6%	$57,028
424910	Farm Supplies Merchant Wholesalers	118,476	7.1%	-1.8%	$61,705
	WEIGHTED AVERAGES/TOTALS	1,586,997	3.9%	2.0%	$37,258

Certain subsectors included in target matrix (Figure 7.2) have different naming than NAICS code subsector and the business activity falls under NAICS listed above.

Source: EMSI, Garner Economics

Importance of skills transferability:

At a time when most areas are near full employment, existing employment in high-demand occupations is key in marketing to targeted industries (Table 7.5). In addition to these needed positions for the Value-added Agribusiness target, there are other occupations that have similar skills to those listed in Table 7.5. Skills of the workforce have grown even more important for employers – both existing industry and relocating firms. A federal database (O*Net) provides crosswalks of skills that can be transferred to other jobs. A sample of several high-demand positions and transferability of their skills from other jobs is shown to the right.

Table 7.14: Employment in High-Demand Occupations
Southern Maryland, 2018

Description	2018 Jobs
Machinist	70
Counter & Rental Clerks	280
Chemical Engineer	130
Business Operations Specialists	6,280
Compliance Officers	170
Sales Representative, Wholesale & Manufacturing	210
Logisticians	1,380
Sales Engineers	30
Material Moving Workers	1,690
Food & Beverage Serving Workers	6,280
Food Processing Workers	160
Mechanical Engineers	90
Inspectors, Testers, Sorters, Samplers, and Weighers	80
Stock Clerks and Order Fillers	180
Production, Planning & Expediting Clerks	140

Source: Maryland Department of Labor,
*Southern Maryland Workforce Region Data, O*Net, Garner Economics*

Skills Transferability for Sample
Value added Agribusiness

Brew Master

Multiple occupations including:

- Chemical Processing Machine Setter, Operators
- Food Batchmaker
- Rolling Machine Setter, Operator & Tender
- Petroleum Pump System Operator

Machinists

Multiple occupations including:

- Machine Tool Setter (Metal & Plastic)
- Welder
- Printing Press Operator
- Maintenance & Repair Worker
- Automotive Technician & Mechanic
- Carpenter
- Plumber
- Heating and Air-Conditioning Mechanic and Installer

Source: EMSI, Garner Economics

Occupations with compatible index of 90 or above earning less than target occupation

Target: Health Services

MedStar Shah Medical Group recently announced the building of two ambulatory medical office buildings in Charles County and creating 80 new jobs. The target already represents a large and growing component of the Charles County economy.

The *Health Care & Social Assistance* sector represents 13% of the County's employment base, and this sector added nearly 450 jobs from 2013–2018. Occupational growth for the *Healthcare Support* category increased by 460 and the *Healthcare Practitioners* group grew by 300 between 2013 and 2018 for the Southern Maryland Workforce Region. With strong population growth and an aging population, this industry group should continue to grow.

The University of Maryland Charles Regional Medical Center is the fourth largest employer in the county with 747 workers serving local residents of Charles County. The hospital's association with the University of Maryland is an asset and can be leveraged to attract talent and attain a more regional reach. Additional subsectors included in this target are physician's offices, outpatient care facilities, medical and diagnostic laboratories, home health care, and nursing or residential care facilities.

University of Maryland-College Park's School of Public Health offers multiple degree programs and centers of research in Health Care that are also a great resource for this target in terms of talent supply and research activity.

Health Services Rationales

- Centrally located for regional markets (P) (C)
- University of Maryland Charles Regional Medical Center location in Charles County (P) (C)
- Availability of technicians and scientists (P)
- High rate of employment growth in *Health Care & Social Assistance* sector
- Availability of postsecondary vocational training (P)
- Within 1 hour of major university/college
- Affordable cost of labor (P)
- Cost of living (P) (C)
- Good quality of life (P) (C)
- Abundant cultural and recreational opportunities (P) (C)
- Affordable cost of living P) (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Health Services Rationales
(continued):

- 9,449 degrees and certificates granted in majors related to target (P)
- Historical national job growth of 24% for past decade (P)(C)
- National job growth forecast of 25% (P)(C)
- National average wage: $54,673 (C)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**

Table 7.15: Regional Degree Completions in Majors Related to Target, 2018

Program	Degrees Granted
Business, Management, Marketing, and Related Support Services	2,903
Social Sciences	1,517
Health Professions and Related Programs	1,388
Computer and Information Sciences and Support Services	1,269
Biological and Biomedical Sciences	656
Communication, Journalism, and Related Programs	519
Psychology	417
Parks, Recreation, Leisure and Fitness Studies	266
Public Administration and Social Service Professions	200
Family and Consumer Sciences/Human Sciences	174
Area, Ethnic, Cultural, Gender, and Group Studies	119
Personal and Culinary Services	21
Total	**9,449**

Graduates from the following schools are included: University of Maryland-College Park, Prince George's Community College, College of Southern Maryland, Strayer University-Maryland, Gallaudet University, Fortis College-Landover, DeVry University-Virginia, Divine Mercy University, CET-Alexandria, University of Phoenix-Washington DC, and Saint Michael College of Allied Health

Source: National Center for Education Statistics, Garner Economics

Table 7.16: Health Services Target Subsectors

NAICS	Description	2018 National Employment	2008–2018 National Job Growth	2018–2028 National Job Growth Forecast	2018 National Average Annual Wage
621111	Offices of Physicians (except Mental Health Specialists)	2,581,974	13.7%	20.0%	$91,049
621112	Offices of Physicians, Mental Health Specialists	67,883	12.0%	22.8%	$73,618
621210	Offices of Dentists	982,484	12.9%	17.6%	$54,284
6213	Offices of Other Health Practitioners	1,037,395	39.4%	27.7%	$43,177
6214	Outpatient Care Centers	957,414	71.7%	36.6%	$64,447
621511	Medical Laboratories	207,907	33.6%	26.6%	$63,111
621512	Diagnostic Imaging Centers	78,676	5.6%	23.7%	$64,951
62161	Home Health Care Services	1,505,970	47.0%	45.9%	$30,345
623110	Nursing Care Facilities (Skilled Nursing Facilities)	1,616,248	-0.4%	2.3%	$34,098
623311	Continuing Care Retirement Communities	492,979	39.9%	33.1%	$29,772
623312	Assisted Living Facilities for the Elderly	442,737	31.6%	32.0%	$26,088
	WEIGHTED AVERAGES/TOTALS	**9,971,666**	**23.6%**	**24.6%**	**$54,673**

Certain subsectors included in target matrix (Figure 7.2) have different naming than NAICS code subsector and the business activity falls under NAICS listed above.

Source: EMSI, Garner Economics

Importance of skills transferability:

At a time when most areas are near full employment, existing employment in high-demand occupations is key in marketing to targeted industries (Table 7.5). In addition to these needed positions for the Health Services target, there are other occupations that have similar skills to those listed in Table 7.5. Skills of the workforce have grown even more important for employers – both existing industry and relocating firms. A federal database (O*Net) provides crosswalks of skills that can be transferred to other jobs. A sample of several high-demand positions and transferability of their skills from other jobs is shown to the right.

Table 7.17: Employment in High-Demand Occupations Southern Maryland, 2018

Description	2018 Jobs
Family and General Practitioners	3,250
Home Health Aides	1,860
Registered Nurses	1,750
Nursing Assistants	1,410
Medical Assistants	550
Licensed Practical and Licensed Vocational Nurses	440
Radiologic Technologists	270
Radiologic Technicians	270
Pharmacy Technicians	260
Dental Assistants	250
Dentists, General	240
Dental Hygienists	220
Pharmacists	210
Physical Therapists	210
Medical and Clinical Laboratory Technologists	120
Clinical Laboratory Technicians	120
Physicians and Surgeons, All Other	90
Physician Assistants	90
Emergency Medical Technicians and Paramedics	80
Nurse Practitioners	50

*Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, O*Net, Garner Economics*

Skills Transferability for Sample Health Services Occupations

Clinical Laboratory Technologists

- Histotechnologist
- Cytotechnologist
- Quality Control Analyst
- Dental Assistant
- Radiologic Technologist
- Computer User Support Specialist
- Medical Assistant
- Environmental Compliance Inspector
- Licensed Practical & Licensed Vocational Nurse

Pharmacy Technicians

Multiple occupations including:

- Teller
- Pharmacy Aide
- Veterinary Assistant
- Nursing Assistant
- Home Health Aide
- Hotel Desk Clerk
- Skincare Specialist

Source: EMSI, Garner Economics

Occupations with compatible index of 90 or above earning less than target occupation

Chapter 8: Recommendations to Continue Success

As noted in the Executive Summary, the 2016 SHAPING THE ECONOMIC FUTURE strategy (Garner Economics' work for the EDD in 2015–16), offered observations, conclusions, and recommendations on what the County and the EDD needed to do to enhance the community's global competitiveness.

Four years later—again assessing Charles County from a site-selector perspective—the Garner Economics team found that the EDD, through effective leadership, continues to evolve into a high-performing, economic development organization, accomplishing its mission of and facilitating investment and job creation. Challenges still exist with the fundamental items that comprise a community's business climate, e.g., the local regulatory environment, tax environment, product suitable to attract and retain investment, and a skilled workforce.

In the initial SHAPING THE ECONOMIC FUTURE strategy, Garner Economics offered 18 recommendations for the EDD and community to implement that were related to their organization, or recommendations that a collective group of organizations or governments needed to take on to enhance the competitiveness of the region (see Chapter 3). Many of these recommendations can only be implemented based on policy decisions by the County's Board of Commissioners or policy changes within the County.

Given the progress made in executing the original strategy and external market forces that now impact the County, the following recommendations were developed to suggest ways to ensure that the County continues to be a place where the world's most innovative companies and talent want to locate and live. The recommendations also take into account feedback from the County's key stakeholders and address areas where the EDD needs either to tell its story better or more directly address issues of econonmic development concern.

FIGURE 8.1: 2016 RECOMMENDATIONS—PROGRESS TO DATE

Not started: 2	Started or In-progress: 9	Completed/Ongoing: 7
• Sustainable funding source for transformative projects • Community benchmarking visits	• Water, wastewater, and infrastructure improvements • Broadband access throughout CC • Improve the gateways • MD airport improvements • Ombudsman • Improve the permitting process • Incentive policy • Entrepreneurship promotion • Lead generation	• Reorganize the EDD • Define and promote the County's value proposition • Marketing toolkit • Earned media • Digital marketing • Consultant and broker relationships • Build business relationships locally

The "Refresh and Recalibrate" strategy is based on the assumption that the region as a whole must remain proactive in shaping its economic future. As with the earlier SHAPING THE ECONOMIC FUTURE report, there are actions in this refresh that the EDD can and should take independently, and there are more initiatives for which the EDD can only be a catalyst to fully transform the region's business climate and successfully carry out the refreshed strategy goals.

Whether by being a strong advocate for change or by taking an active role in pursuing such change, going forward, the EDD should continue to make the case with local and state partners and stakeholders for how new initiatives or the changes in policies will improve the County's business climate. It is imperative that the EDD convey how such changes will allow it and other economic development groups in the region to provide world-class economic development marketing and service delivery. And, how failing to do so will place the County at a disadvantage when competing against other locations to recruit and attract companies and talent. Inherent in this continued proactive approach will be the need for strong public and private leadership throughout the County and within all of its many organizations, jurisdictions, and municipalities.

Continuing to Enhance Charles County

Recommendations for action within this refresh are categorized in three areas of opportunity:

- Carryover items that still need to be implemented from the 2016 SHAPING THE ECONOMIC FUTURE strategy;
- EDD-Centric recommendations for continued success in economic development service delivery, including marketing and organizational; and,
- Community recommendations that reflect the global competitiveness of the region.

There are far fewer recommendations in this refresh than the original strategy; however, those recommendations from SHAPING THE ECONOMIC FUTURE in Figure 8.1 that are noted as "In Process" or "Ongoing" should continue and are not included in the recommendations list below.

FIGURE 8.1: RECOMMENDATION CATEGORIES

Carryover Initiatives

Recommendations offered in the 2016 strategy that are either in-process or ongoing

EDD Centric

Organizational adjustments that allow the EDD to work proactively in those areas that directly impact the economic growth the community desire

Community

Initiatives that address the County's overarching competitiveness and need action and buy-in from the entire community

I. Charles County-Centric

Strategy:

Continue to carry out initiatives in key economic development delivery service and product areas that support the County's desire to attract and grow more high-quality economic activities and to support the current and future residents of Charles County.

1. **"No product—No Project™"**

Garner Economics uses this mantra to reinforce the importance of having real estate inventory that meets the demands of a community's targeted industries. Having the "right" product is always paramount to achieving economic development success.

A key targeted business sector for Charles County is the office sector. According to CoStar, an aggregator of office, commercial, retail, and industrial properties by county, Charles County has a vacancy rate of combined Class A & B space of 6.2%, which equates to 120,000 sq. ft. available. The targeted industries noted will have a demand mostly in Class A space, of which Charles County has even less available space.

Given this continued gap, the County will need to continue to be proactive and incentivize private developers to create Class A office space on a speculative basis. This was offered as a recommendation in 2016. Without the efforts to induce or encourage the development of more office space, Charles County will be less apt to achieve its business attraction goals in the targeted sectors.

2. **Create a one-stop permitting office to streamline the permitting process and create an internal culture of "yes."**

This was a foundational recommendation made in the 2016 strategic plan based on the nearly unanimous feedback received from the County's business leaders. Also, as recommended in the 2016 Strategic Plan and referenced in the Commissioner President's white paper in 2019, an **ombudsman** position should be created and placed in the County Administrator's office to assist with issues related to commercial permitting. Within focus groups and through an electronic survey regarding the County's business climate that was circulated widely, business leaders opined about how difficult it is to navigate the permitting and regulatory process in Charles County.

Many states, regions, and communities tout their business climate as an incentive for businesses to invest in their geography. Companies looking for that ease of access or seamlessness to conduct business appreciate such efforts when considering their next location.

Neither the state of Maryland nor Charles County are considered a business-friendly environment. Businesses within the County point to the permitting process and other forms of the regulatory environment as onerous compared to other jurisdictions they have worked or invested in effectively. As such, they are either hesitant to expand their own businesses or are unwilling to recommended Charles County as a preferred business location.

According to the EDD, previous County policymakers did not consider streamlining the permitting process a priority. However, the current commission president has presented a white paper to the full Board of Commissioners recommending several initiatives to streamline and improve the permitting and approval process as recommended in the 2016 EDD Strategic Plan.

3. Being proactive and strategic to attract FDI

In recent months, the EDD has been much more proactive in its efforts to promote trade (exporting local products and services) and related foreign direct investment (FDI). As it relates to trade, the efforts have focused mostly on the continent of Africa. A sister-city agreement was recently entered into between Charles County and Matola, Mozambique.

Charles County should continue its global business development efforts proactively, but it needs to be strategic. Efforts to attract FDI should center around its list of targeted industry sectors. Trade initiatives should be focused on how best to assist Charles County businesses in selling their products and services abroad to those countries that have the highest demand for these goods and services. A Sister Cities agreement can indeed foster these trade and investment opportunities, if researched effectively to determine how both communities can benefit from each other.

II. EDD-Centric

Strategy:

Continue to share Charles County's business opportunity story in a more holistic way by creating the structure to do so.

1. **Transfer the tourism functions from the Department of Recreation, Parks, and Tourism (RPT) to the EDD.**

   The hospitality industry, which includes tourism promotion and conventions attraction, is a significant component of a community's economic development sector, whose activities draw economic impact to Charles County. Visitor attraction is also an effective tool within a community's talent attraction efforts. In more cases than not, talent will "test out" a location through a visit before committing to relocate to the area.

   Currently, Charles County's visitor promotion efforts are housed in the Department of Parks and Recreation. Typically, a department that includes parks and recreation programming tends to be more focused on the creation and maintenance of recreational infrastructure that has both residential and visitor-facing uses. Traditionally, parks and recreation departments are not focused on the selling or promoting of a place/destination.

Combining visitor promotion with more traditional economic development activities (recruitment, retention, and entrepreneurship), makes sense for Charles County for a multitude of reasons:

- Places leave the most lasting impressions, tangible or intangible, on human beings as individuals, whether they are deciding where a company stays or relocates or where they want to vacation.
- As information is more readily available and the competition to attract talent or visitors heightens, visitors and companies face more difficult decisions. The onset of digital and easily accessible information and data is a game changer in how decisions are made.
- More and more, companies are seeking to locate where the workforce and talent are, and visitors tend to seek options for their next vacations based on information they glean from the internet. How a community's brand attracts and retains those audiences is the destination challenge over the next decade.
- With a discernible and credible brand, communities can be more successful and effective in having a real dialogue about the community's assets, differentiating factors, and authentic character.
- A combined, unified brand that incorporates the value proposition for tourists, conventioneers, and new investors to a community (recruitment) works best in tandem and seamlessly.

Based on economies of scale and the mission and goals of the EDD and the RPT, Garner Economics recommends that the tourism promotion functions of the RPT (programming, budget, and staffing) be integrated into the management of the EDD. Tourism is economic development. Combining that wealth-building and place-based branding function within the service delivery of the EDD is a recipe for success.

2. Rebrand the name of the Charles County Economic Development Department and of the title of the department head.

As noted in recommendation #3 in the Charles County EDD section above, Charles County has a recent initiative to be more proactive in attracting FDI and in promoting trade. The County's economic development efforts are branded the "Economic Development Department." That title and the presumed functions the title exudes are archaic and a throwback to economic development practices of the 1950s.

Garner Economics recommends that the department be rebranded to "Global Business Investment," which is more attuned to today's global economy. Additionally, titles are important in the world of business development, especially on a global basis and with Asian and Western European business cultures. The department head of the EDD has the title of "director." To many business cultures, including some in the United States, this implies a mid- to low-level employee.

Status begets status in economic development. Garner Economics recommends a title change of the director to either "president" or "executive director." Our preference is president since executive director generally implies a not-for-profit organization and the functions of the EDD are business oriented.

3. Add full time positions for business retention and expansion (BRE), and business attraction.

In the 2016 final strategy report, Garner Economics offered a recommendation to enhance the staffing for the EDD to include a full-time position for both BRE and business attraction. Based on budget constraints, neither of these positions were filled. The Director of the EDD offered a reorganization strategy to the County Administrator at that time (December 2015) which included a reorganization strategy to: (1) enhance EDD's organizational efficiency, (2) position the EDD to effectively implement the Commissioners' goals and objectives for the County and the County's Strategic Economic Development Plan (CSEDP), and (3) address operational protocols and departmental functions. Specifically, these changes required: (a) position reclassifications and reorganization, (b) creating new positions, and (c) increasing the EDD' budget by adding new positions. We believed then that this reorganization was sound, with some additional enhancements offered by Garner Economics related to growing retail (based on a retail leakage analysis noted in the final report) and efforts to grow entrepreneurship in the County.

Since then, the EDD has made enhancements and modifications to its department, including a part time BRE consultant, and a full-time agriculture business development manager. Nevertheless, the County has a disproportionally higher number of jobs created by existing businesses rater than a balanced approach of growth from within, entrepreneurial, and, new business attraction. It is our recommendation that the County fund the BRE position from part-time to fulltime and create the business attraction manager position, for a total of 2 full time positions. This will allow the EDD and the County Commission to subscribe to an effective and holistic approach of a successful economic development strategy with equal efforts in retention, recruitment and entrepreneurship.

Chapter 9: What's Next?

Charles County is well on its way to leveraging its location and existing businesses to raise its visibility as a competitive place for high-quality businesses. However, the County needs to strengthen the product it has to offer—especially in relation to its office development—as well as to continue to make improvements to its economic development service delivery efforts.

In reviewing the progress made since the 2016 strategy, Garner Economics found that the EDD and County have made strong strides. This report summarizes ways to continue to enhance its efforts as well as to refine efforts along four target business sectors, as well as one new target.

Through this report, **SHAPING THE ECONOMIC FUTURE OF CHARLES COUNTY 2.0: REFRESH AND RECALIBRATE**, the EDD and County have an updated road map around which to finish a few of the initial strategy recommendations as well as make long-term structural investments and policy changes to ensure that the County can attract the types of activity it wants.

***

Garner Economics would like to thank the Charles County EDD staff and the stakeholders for their help and assistance during this process. Their feedback, compilation of data, and information—as well as their openness and willingness to explore various opportunities to strengthen operations—have contributed to the richness and rigor of this report.

APPENDIX A: 2019 Refresh Electronic Survey Results

Survey Respondents (n=104)

By Residence vs. Place of Work	2016	2019
• Live in Charles County*	96.7 %	80.8%
• Work in Charles County	66.7	72.1
• Live and Work in Charles County	64.5	58.7

Length of Residence in Charles County		
• 1–5 years	14.4 %	15.5%
• 6-–10 years	10.8	5.8
• 11–15 years	12.6	66.1
• More than 15 years	62.3	
• Do not live in Charles County		12.6

*Charles County ZIP codes include: 20601-4, 20607, 20611-13, 20616-17, 20622, 20625, 20632, 20637, 20640, 20643, 20645-46, 20658, 20661-62, 20664, 20675, 20677, 20682, 20693, and 20695.

1. What are several words or phrases that describe Charles County? (Select up to 3 responses.)

Response Option	# Rec'd
Growing	51
Close to Washington, DC	43
Diverse	38
Lacks a brand; not well-known	34
Suburban, bedroom community	34
Mixed support for growth/development	31
Beautiful/scenic	26
Other	16
Friendly, welcoming	10
Good schools	8

"Other" responses:

- Lacks quality of place amenities (3)
- Not business-friendly (2)
- Congested (2)
- Anti-growth (2)
- Transportation access
- Lack of leadership
- Sprawling
- Lack of professional level talent
- Disconnected
- Backward
- PG County south

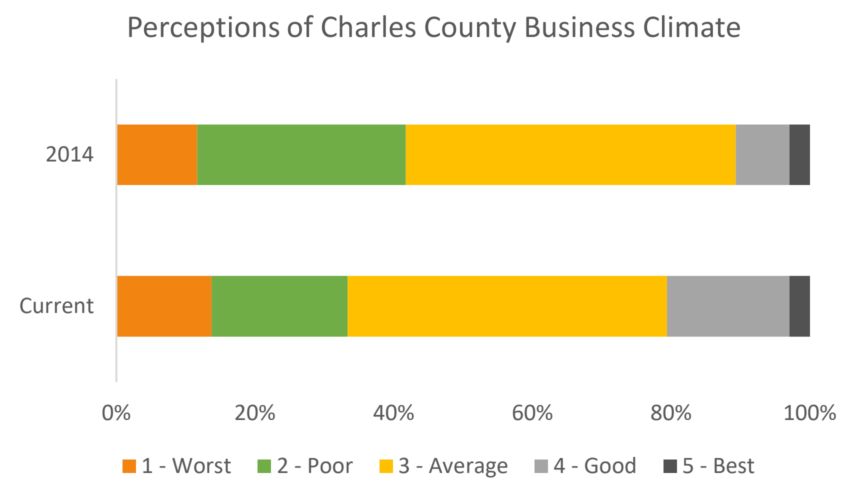
2. What do you think are some of the inhibitors Charles County has in its ability to attract, expand, or retain businesses and investment? (Choose up to 5 responses.)

Response Option	# Rec'd
Infrastructure (e.g., Transportation, Broadband, etc.)	59
Negative perceptions of County's business climate	41
Lack of incentives to entice companies	40
Zoning and permitting	35
Lack of shared vision	32
Lack of skilled workforce; too many out-commuters	31
Lack of amenities for residents	18
Other, please describe	16
Lack of cooperation/coordination with neighboring communities	8
Small retail market	7
Lack of available sites	3

"Other" responses:

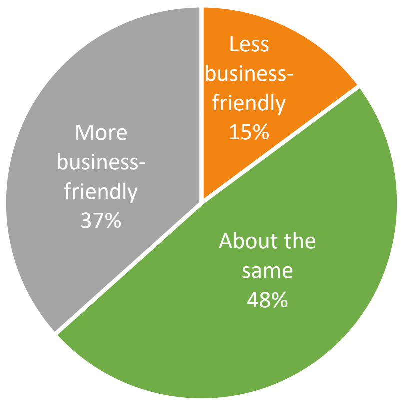
- None (2)
- No county vision for economic future; depend on developers to set direction (2)
- Too far away from DC (2)
- Cost of office space (2)
- Lack of quality-of-place amenities (2)
- Declining schools (2)
- Negative business climate
- Congestion
- Special interests
- Lack of brand in DC MSA
- Regulations for construction

3. On a scale of 1 to 5, with 5 being best, how would you have rated the business climate of the County 5 years ago? How would you rate it currently?



	2014	Current
1 - Worst	11.7%	13.7%
2 - Poor	30.1%	19.6%
3 - Average	47.6%	46.1%
4 - Good	7.8%	17.6%
5 - Best	2.9%	2.9%

4. Is the Board of County Commissioners more business-friendly in its policies or less today than in 2016?



Response Option	# Rec'd
Less business- friendly	15
About the same	49
More business-friendly	37

Comments

- It would seem they are more business friendly than their predecessors.
- I'll give new commissioners a shot; last four ruined the County.
- Too much rhetoric and not enough deeds.
- Previous group of commissioners swung the pendulum too far toward an anti-business/very environmentally friendly stance. The group before that was too far in the pro-business/pro-development arena. This board seems like it wants to appeal/embrace both. That's good.
- It's about finding a balance between protecting the citizens and allowing businesses to thrive. The Commission has allowed the door to unethical behavior.
- Business-friendly, but that has not translated down to the departments.
- They say they are open for business, but we are not seeing enough help on the small-business end.
- The current commission board has not taken any significant steps at encouraging homegrown, community-oriented development nor have they done any worse. The developmental policies that impact the business climate have essentially remained the same from the previous administration. The current board has maintained the less-than-sufficient status quo.
- Some indication of an improved attitude toward business development in first nine months, but improvement still needed
- The commissioners are more business-friendly, but a lot of current regs and policies from prior administrations are still in place. Staff needs to evaluate recurring hurdles facing businesses and put forth recommendations to remove obstacles. EDD should be capturing information on why businesses chose to locate elsewhere and why existing businesses left the County.
- The commissioners are business-friendly but need to get things going in the County, such as mixed used development along 301 and 210. We need Maryland Airport to expand and revive the dead Science and Tech Park dream. We need incentives for all businesses coming into the County, such as tax incentives and business development grants. We also need to require SLBE set aside jobs for contractors with offices in the county. DC and PG county have similar programs, and I've seen a flock of business move from Virginia and Montgomery County there.

5. What do businesses need that they can't find in the County? (Select up to 3 responses.)

Response Option	# Rec'd
Mass transit or strong transportation infrastructure	57
Quality of place amenities for millennials/younger workforce	46
Qualified and available workforce	39
Assistance in navigating permitting/zoning	32
Incentives or financing support	30
Broadband/High-speed internet access	31
Other	16
Class A office space	12
Assistance with starting a business	12

"Other" responses:

- Strategic marketing to companies (3)
- Tax breaks
- Affordable, workforce housing
- More DOD customers
- Replace septic system
- None

6. What hard or soft infrastructure is missing or unsatisfactory in Charles County? (Select up to 3 responses.)

Response Option	# Rec'd
Mass transit/light rail	51
Reliable transportation network	44
Sidewalks and bike paths	34
Aging infrastructure (roads, sewer, and water)	34
Workforce/resident amenities	32
Broadband	30
Amenities along the waterfront	22
Other, please describe	16
Diversity of housing options	15

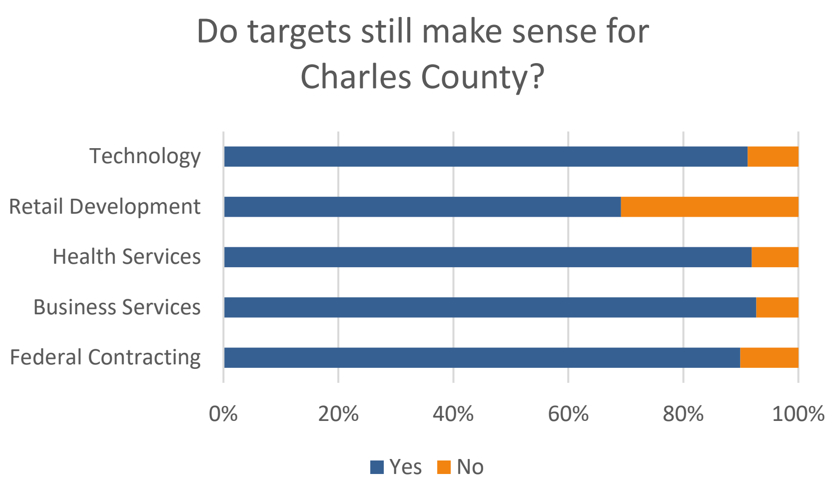
"Other" responses:

- Visitor Attractions (e.g., Wolftrap)
- EDD that supports existing business
- Stronger County Commission
- Crosswalks
- Regulations that give preference to county businesses for county contracts
- Lack of focus on north-south gridlock issues
- Community gathering place
- Make waterfront more user friendly on Pax River

7. Give some examples of local, unique, and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of Charles County.

- None or do not know (17)
- Rural Planning and Zoning Task Force (3)
- Saving its natural resources for ecotourism (2)
- Small Business Incentives (2)
- Farmers Market (2)
- Public private partnerships
- Building up the waterfront areas. Build marina, more restaurants, active areas so that we don't have to travel to DC for the amenities.
- Training to Charles County citizens
- Friendlier zoning & permitting process
- CSM/Navy alliance
- Workforce program offered by the employment office to assist small businesses assisting businesses with a paid employee for four months.
- Support for veteran-owned businesses
- Housing Incentives
- Festivals
- Backpack Giveaways
- Support and assistance for medical marijuana businesses
- EDD Outreach
- STEM Program at North Point
- Bike Trail
- Using CSM as a way to stimulate the local economy
- Velocity Center
- Investing in parks, recreation, and leisure activities for residents
- SLBE
- Easing the regulations on breweries/wineries/distilleries within Charles County
- Ag marketing person within ED
- Tri-County Council meetings
- Rural Zoning and Planning Task Force

8. Charles County's targeted business sectors list, as noted on its website, are below. Do these targets still make sense for Charles County?



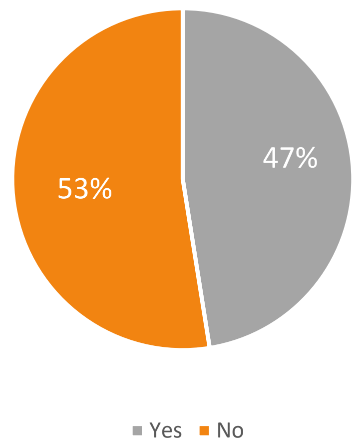
	Yes	No
Federal Contracting	89	10
Business Services	89	7
Health Services	91	8
Retail Development	65	29
Technology	93	9

What other businesses should be considered?

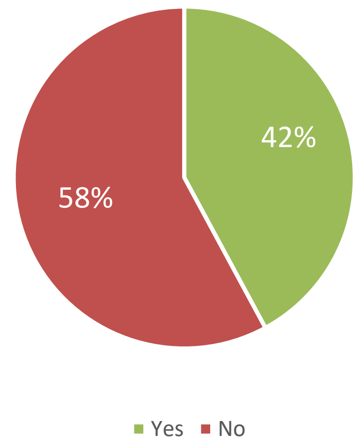
- Industrial/manufacturing (light, heavy, distribution) (7)
- Agriculture (7)
- Entertainment/Sports (6)
- High-End Retail (6)
- Hotel and Lodging/Tourism (4)
- Agritourism (3)
- Aerospace (2)
- Alternative Energy/Environmental Technologies (2)
- Professional Services (2)
- Marina and Boating Industries
- Transportation
- R&D
- Construction
- Human Resource Management
- Outdoor Recreation
- Federal Government
- Ecotourism
- Environmental/Climate Change
- Wineries/Distilleries
- Tourism—build waterfront venues
- Software, Computer Systems
- Warehouse, Fulfillment
- Technology

9. In 2016, the Charles County Economic Development Department (EDD) completed a comprehensive economic development Strategic Plan for the County to enhance the County's economic vitality.

Do you think the economy is better in Charles County today than it was in 2016?



10. Do you think the Charles County Economic Development Department is doing an effective job in working to enhance the economic vitality of Charles County?



11. Are there any other issues that should be examined when assessing Charles County's progress in executing the 2016 Strategic Plan?

- Assessment and support of quality of life factors and amenities (4)
- Mass transit, roadways (e.g., Indian Head and Bryans Road) (4)
- Permit and permit inspection process (4)
- Focus on sustainability of development (3)
- Leverage waterfront (2)
- Business funding and available capital (2)
- Recruiting larger companies that provide living wage (2)
- Focus on infrastructure
- Public private partnerships
- Incentive for business to come the County
- Work on environmental concerns by cleaning up the Pax River area waterfront; the historic properties that have such beautiful scenery could be tourist attractions if they had someone to build them
- Fairness and consistency in assessments
- Cultural aspects of community
- Focus on outdoor recreation and outdoor spaces
- Ecotourism opportunities
- Access to parks for residents and visitors
- Amend recent zoning (WCD) that restricted property rights on use or subdivision of land
- Need objective urban planners
- Aesthetics of the community
- Overreliance on Federal Opportunity Zones
- Establish a municipally owned and operated internet service in Indian Head
- Reduce real estate taxes
- More aggressive support for the expansion of Maryland Airport
- Reevaluate Hughesville Village Plan and rezone the Hughesville Industrial Park back to Industrial
- Provide more support to existing businesses to help them grow

Comments specifically related to the EDD and its functions

- Cross departmental cooperation
- Leadership and HR policies that seem to hinder performance
- Are resources being directed to the objectives noted in the plan?
- Organizational benchmarking for the EDD

Appendix B: Industry Details

Specialized industries are highlighted for location quotients greater than 1.20

NAICS	Description	2018 Jobs	2013–2018 Change	2018 Location Quotient	2018 Wages
11	NAICS 11 Agriculture				
111	NAICS 111 Crop production	6	-1	0.0	$24,335
113	NAICS 113 Forestry and logging	12	-4	0.7	$45,270
23	NAICS 23 Construction	3,870	392	1.8	$63,501
236	NAICS 236 Construction of buildings	716	318	1.6	$84,419
237	NAICS 237 Heavy and civil engineering construction	186	-543	0.5	$57,726
238	NAICS 238 Specialty trade contractors	2,968	616	2.3	$58,818
31	NAICS 31-33 Manufacturing	621	16	0.2	$52,151
311	NAICS 311 Food manufacturing	45	45	0.1	$25,470
312	NAICS 312 Beverage and tobacco product manufacturing	94	-1	1.2	$48,551
321	NAICS 321 Wood product manufacturing	29	-16	0.3	$49,566
323	NAICS 323 Printing and related support activities	138	-19	1.1	$49,067
327	NAICS 327 Nonmetallic mineral product manufacturing	112	-32	1.0	$67,287
332	NAICS 332 Fabricated metal product manufacturing	106	73	0.3	$54,872
334	NAICS 334 Computer and electronic product manufacturing	15	-3	0.1	$76,984
337	NAICS 337 Furniture and related product manufacturing	13	-3	0.1	$46,046
339	NAICS 339 Miscellaneous manufacturing	12	1	0.1	$33,042
42	NAICS 42 Wholesale				
423	NAICS 423 Merchant wholesalers, durable goods	288	44	0.3	$55,401
424	NAICS 424 Merchant wholesalers, nondurable goods	173	-102	0.3	$60,486
44	NAICS 44-45 Retail trade	7,630	-687	1.7	$28,181
441	NAICS 441 Motor vehicle and parts dealers	1,055	-241	1.9	$48,068
442	NAICS 442 Furniture and home furnishings stores	213	-33	1.6	$30,586
443	NAICS 443 Electronics and appliance stores	195	-109	1.4	$36,142
444	NAICS 444 Building material and garden supply stores	712	-43	1.9	$33,574

NAICS	Description	2018 Jobs	2013–2018 Change	2018 Location Quotient	2018 Wages
445	NAICS 445 Food and beverage stores	1,440	-123	1.6	$26,583
446	NAICS 446 Health and personal care stores	485	48	1.6	$32,181
447	NAICS 447 Gasoline stations	237	27	0.9	$22,932
448	NAICS 448 Clothing and clothing accessories stores	768	-16	2.0	$17,451
451	NAICS 451 Sports, hobby, music instrument, bookstores	293	-67	1.8	$18,050
452	NAICS 452 General merchandise stores	1,859	-172	2.1	$21,745
453	NAICS 453 Miscellaneous store retailers	316	33	1.3	$21,546
454	NAICS 454 Nonstore retailers	58	9	0.4	$27,924
48	NAICS 48-49 Transportation and warehousing	1,428	96	0.8	$39,627
484	NAICS 484 Truck transportation	168	-32	0.4	$39,922
485	NAICS 485 Transit and ground passenger transportation	650	110	3.1	$30,792
488	NAICS 488 Support activities for transportation	99	99	0.4	$39,858
491	NAICS 491 Postal service	226	119	1.3	$53,268
51	NAICS 51 Information	301	-43	0.4	$58,697
517	NAICS 517 Telecommunications	140	-29	0.7	$84,557
519	NAICS 519 Other information services	91	91	0.7	$36,744
52	NAICS 52 Finance and insurance	646	-49	0.4	$67,410
522	NAICS 522 Credit intermediation and related activities	445	-42	0.6	$68,498
524	NAICS 524 Insurance carriers and related activities	172	-17	0.3	$54,624
53	NAICS 53 Real estate and rental and leasing	434	-32	0.7	$42,404
531	NAICS 531 Real estate	340	340	0.7	$42,680
532	NAICS 532 Rental and leasing services	94	94	0.6	$41,406
54	NAICS 54 Professional and technical services	1,687	-338	0.6	$77,302
541	NAICS 541 Professional and technical services	1,687	-338	0.6	$77,302
55	NAICS 55 Management of companies and enterprises	233	78	0.4	$83,569
551	NAICS 551 Management of companies and enterprises	233	78	0.4	$83,569
56	NAICS 56 Administrative and waste services	1,257	270	0.5	$39,460
561	NAICS 561 Administrative and support services	1,140	256	0.5	$36,871
562	NAICS 562 Waste management and remediation services	117	15	0.9	$64,627

NAICS	Description	2018 Jobs	2013–2018 Change	2018 Location Quotient	2018 Wages
61	NAICS 61 Educational services	5,369	188	1.5	$47,827
611	NAICS 611 Educational services	5,369	188	1.5	$47,827
62	NAICS 62 Health care and social assistance	5,234	447	0.9	$46,524
621	NAICS 621 Ambulatory health care services	2,322	109	1.1	$60,292
622	NAICS 622 Hospitals	13	13	0.0	$60,183
623	NAICS 623 Nursing and residential care facilities	1,091	209	1.1	$31,624
71	NAICS 71 Arts, entertainment, and recreation	471	11	0.6	$13,208
712	NAICS 712 Museums, historical sites, zoos, and parks	4	-2	0.1	$64,457
72	NAICS 72 Accommodation and food services	5,157	131	1.3	$17,813
721	NAICS 721 Accommodation	251	-48	0.4	$19,304
722	NAICS 722 Food services and drinking places	4,906	179	1.5	$17,737
81	NAICS 81 Other services, except public administration	1,577	167	1.2	$35,772
811	NAICS 811 Repair and maintenance	584	31	1.5	$49,981
812	NAICS 812 Personal and laundry services	735	51	1.7	$27,595
813	NAICS 813 Membership associations and organizations	206	52	0.5	$29,700
814	NAICS 814 Private households	52	33	0.6	$15,894
92	NAICS 92 Public administration	4,372	197	2.1	$77,967
921	NAICS 921 Executive, legislative and general government	13	-1	0.0	$99,288
922	NAICS 922 Justice, public order, and safety activities	92	16	0.2	$38,245
924	NAICS 924 Administration of environmental programs	5	1	0.1	$86,058
926	NAICS 926 Administration of economic programs	180	-7	1.1	$57,835
928	NAICS 928 National security and international affairs	1,886	102	11.5	$105,773

Source: U.S. Bureau of Labor Statistics, Garner Economics

Appendix C: Occupation Details

Specialized occupational categories are highlighted for location quotients greater than 1.20. Table presents Southern Maryland Workforce Region.

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
11-0000	Management Occupations	5,570	-230	0.9	$116,871
11-2021	Marketing Managers	60	-50	0.3	$147,565
11-2022	Sales Managers	150	-30	0.5	$130,187
11-2031	Public Relations and Fundraising Managers	20	10	0.3	$122,852
11-3011	Administrative Services Managers	90	-90	0.4	$113,893
11-3021	Computer and Information Systems Managers	310	10	0.9	$146,089
11-3031	Financial Managers	320	-70	0.6	$133,394
11-3051	Industrial Production Managers	60	50	0.4	$108,840
11-3061	Purchasing Managers	110	10	1.9	$137,576
11-3071	Transportation, Storage, and Distribution Managers	30	-20	0.3	$120,059
11-3121	Human Resources Managers	60	0	0.5	$120,999
11-3131	Training and Development Managers	30	n/a	1.0	$117,353
11-9021	Construction Managers	300	120	1.3	$112,990
11-9031	Education Administrators, Preschool and Childcare Center/Program	80	n/a	1.9	$49,026
11-9032	Education Administrators, Elementary and Secondary School	440	-10	2.0	$103,142
11-9033	Education Administrators, Postsecondary	30	n/a	0.2	$124,434
11-9039	Education Administrators, All Other	120	-80	3.4	$125,430
11-9041	Architectural and Engineering Managers	280	160	1.7	$146,564
11-9051	Food Service Managers	190	60	1.0	$67,930
11-9061	Funeral Service Managers	10	n/a	1.4	$113,808
11-9111	Medical and Health Services Managers	270	0	0.9	$114,892
11-9131	Postmasters and Mail Superintendents	30	-10	2.6	$69,816
11-9141	Property, Real Estate, and Community Association Managers	90	-30	0.5	$72,760
11-9151	Social and Community Service Managers	100	60	0.8	$66,039
11-9199	Managers, All Other	580	-130	1.5	$136,621
11-1011	Chief Executives	30	-50	0.2	$210,371
11-1021	General and Operations Managers	1,700	-120	0.9	$111,315
11-1031	Legislators	20	-20	0.5	$44,407
13-1020	Buyers and Purchasing Agents	800	n/a	2.3	$86,704

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
13-0000	Business and Financial Operations Occupations	8,180	90	1.2	$94,209
13-1041	Compliance Officers, Except Ag, Construction, Health and Safety, and Transportation	170	20	0.7	$90,081
13-1051	Cost Estimators	240	40	1.3	$83,094
13-1071	Human Resources Specialists	320	0	0.6	$80,038
13-1081	Logisticians	1,380	190	9.5	$104,277
13-1111	Management Analysts	1,260	-340	2.2	$101,913
13-1121	Meeting, Convention, and Event Planners	30	0	0.3	$50,794
13-1131	Fundraisers	20	10	0.3	$60,523
13-1151	Training and Development Specialists	240	-20	1.0	$71,067
13-1161	Market Research Analysts and Marketing Specialists	120	-10	0.2	$66,522
13-1199	Business Operations Specialists, All Other	1,460	-120	1.6	$101,447
13-2011	Accountants and Auditors	500	-250	0.5	$82,885
13-2031	Budget Analysts	50	-20	1.1	$90,710
13-2051	Financial Analysts	220	0	0.8	$76,992
13-2071	Credit Counselors	20	n/a	0.7	$41,883
13-2099	Financial Specialists, All Other	660	0	6.0	$93,198
15-0000	Computer and Mathematical Occupations	6,450	1,840	1.7	$99,505
15-1111	Computer and Information Research Scientists	350	70	13.7	$114,830
15-1121	Computer Systems Analysts	1,230	410	2.5	$98,746
15-1122	Information Security Analysts	260	0	2.8	$102,672
15-1131	Computer Programmers	180	-40	0.9	$95,601
15-1132	Software Developers, Applications	300	-10	0.4	$103,371
15-1133	Software Developers, Systems Software	740	180	2.1	$111,537
15-1134	Web Developers	50	-30	0.5	$86,770
15-1141	Database Administrators	170	30	1.8	$96,110
15-1142	Network and Computer Systems Administrators	750	320	2.4	$103,134
15-1143	Computer Network Architects	200	90	1.5	$107,638
15-1152	Computer Network Support Specialists	300	150	1.9	$74,851
15-1199	Computer Occupations, All Other	620	230	1.9	$111,624
15-2021	Mathematicians	30	-10	13.6	$112,846
15-2031	Operations Research Analysts	780	450	8.8	$103,894
17-0000	Architecture and Engineering Occupations	7,340	890	3.4	$107,700
17-1011	Architects, Except Landscape and Naval	20	n/a	0.2	$79,662

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
17-1022	Surveyors	40	10	1.0	$76,327
17-2011	Aerospace Engineers	980	90	18.0	$116,559
17-2041	Chemical Engineers	130	-20	4.8	$103,164
17-2051	Civil Engineers	140	-60	0.5	$92,606
17-2061	Computer Hardware Engineers	490	230	9.5	$126,465
17-2071	Electrical Engineers	640	300	4.0	$113,035
17-2072	Electronics Engineers, Except Computer	900	-190	7.9	$124,328
17-2111	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	30	-10	1.3	$116,586
17-2112	Industrial Engineers	300	50	1.3	$108,194
17-2131	Materials Engineers	90	30	3.9	$120,543
17-2141	Mechanical Engineers	950	310	3.7	$106,208
17-2199	Engineers, All Other	860	50	7.1	$124,604
17-3011	Architectural and Civil Drafters	40	0	0.5	$49,116
17-3012	Electrical and Electronics Drafters	50	40	2.4	$73,787
17-3013	Mechanical Drafters	80	50	1.7	$64,060
17-3021	Aerospace Engineering and Operations Technicians	100	n/a	11.6	$70,883
17-3023	Electrical and Electronics Engineering Technicians	640	10	5.9	$83,942
17-3024	Electro-Mechanical Technicians	150	n/a	13.0	$77,106
17-3027	Mechanical Engineering Technicians	140	110	4.0	$67,995
17-3029	Engineering Technicians, Except Drafters, All Other	410	-40	5.8	$92,781
17-3031	Surveying and Mapping Technicians	40	-40	0.9	$56,369
19-0000	Life, Physical, and Social Science Occupations	650	-160	0.7	$88,161
19-1023	Zoologists and Wildlife Biologists	10	n/a	0.7	$42,866
19-1031	Conservation Scientists	20	10	1.1	$59,347
19-2012	Physicists	90	10	6.0	$105,728
19-2031	Chemists	110	10	1.5	$112,845
19-2041	Environmental Scientists and Specialists, Including Health	60	-10	0.9	$70,758
19-3031	Clinical, Counseling, and School Psychologists	100	-40	1.1	$80,798
19-3051	Urban and Regional Planners	50	-10	1.6	$74,354
19-3099	Social Scientists and Related Workers, All Other	20	n/a	0.7	$102,268
19-4099	Life, Physical, and Social Science Technicians, All Other	20	0	0.4	$62,203
21-0000	Community and Social Services Occupations	1,620	180	0.9	$53,478
21-1012	Educational, Guidance, School, and Vocational Counselors	630	130	2.6	$57,680

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
21-1018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	100	n/a	0.4	$50,705
21-1021	Child, Family, and School Social Workers	140	10	0.5	$54,133
21-1022	Healthcare Social Workers	150	40	1.0	$53,691
21-1023	Mental Health and Substance Abuse Social Workers	80	60	0.8	$41,985
21-1091	Health Educators	30	0	0.6	$56,140
21-1093	Social and Human Service Assistants	160	-10	0.5	$35,310
21-1094	Community Health Workers	20	-10	0.4	$52,708
21-1099	Community and Social Service Specialists, All Other	50	-60	0.6	$51,090
23-0000	Legal Occupations	520	-160	0.5	$81,977
23-1011	Lawyers	220	-10	0.4	$104,138
23-2099	Legal Support Workers, All Other	90	30	2.4	$81,173
25-0000	Education, Training, and Library Occupations	13,510	650	1.8	$51,790
25-2011	Preschool Teachers, Except Special Education	950	130	2.6	$30,477
25-2012	Kindergarten Teachers, Except Special Education	380	-10	3.4	$57,688
25-2021	Elementary School Teachers, Except Special Education	2,400	-150	2.0	$64,729
25-2022	Middle School Teachers, Except Special and Career/Technical Education	880	-270	1.7	$66,077
25-2031	Secondary School Teachers, Except Special and Career/Technical Ed	2,320	640	2.6	$66,239
25-2052	Special Education Teachers, Kindergarten and Elementary School	610	n/a	3.9	$60,049
25-2054	Special Education Teachers, Secondary School	370	120	3.1	$60,939
25-3011	Adult Basic and Secondary Education and Literacy Teachers and Instructors	50	n/a	1.0	$64,300
25-3021	Self-Enrichment Education Teachers	190	70	0.9	$40,145
25-3097	Teachers and Instructors, All Other, Except Substitute Teachers	460	n/a	1.7	$54,742
25-3098	Substitute Teachers	1,020	-110	2.0	$27,814
25-4021	Librarians	220	20	2.1	$56,839
25-4031	Library Technicians	160	-70	2.1	$36,425
25-9031	Instructional Coordinators	120	-110	0.9	$77,207
25-9041	Teacher Assistants	2,560	790	2.3	$27,312
25-9099	Education, Training, and Library Workers, All Other	30	-70	0.3	$47,761
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	920	60	0.6	$66,172
27-1023	Floral Designers	20	-10	0.5	$33,051
27-1024	Graphic Designers	110	10	0.6	$54,836
27-1026	Merchandise Displayers and Window Trimmers	50	30	0.5	$29,680
27-2022	Coaches and Scouts	180	80	0.9	$69,617
27-3031	Public Relations Specialists	90	10	0.4	$68,862

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
27-3041	Editors	20	-20	0.2	$56,456
27-3042	Technical Writers	130	10	3.0	$80,459
27-3091	Interpreters and Translators	10	-50	0.2	$65,783
27-4011	Audio and Video Equipment Technicians	20	n/a	0.3	$43,257
29-0000	Healthcare Practitioners and Technical Occupations	5,940	330	0.8	$80,511
29-1021	Dentists, General	240	130	2.5	$120,050
29-1031	Dietitians and Nutritionists	30	10	0.5	$65,454
29-1051	Pharmacists	210	-40	0.8	$118,797
29-1069	Physicians and Surgeons, All Other	90	-160	0.3	$237,869
29-1071	Physician Assistants	90	30	0.9	$120,977
29-1122	Occupational Therapists	100	30	0.9	$94,832
29-1123	Physical Therapists	210	-60	1.1	$95,805
29-1125	Recreational Therapists	20	n/a	1.2	$36,621
29-1126	Respiratory Therapists	70	20	0.6	$69,293
29-1127	Speech-Language Pathologists	120	-40	1.0	$84,576
29-1128	Exercise Physiologists	20	n/a	3.5	$41,835
29-1131	Veterinarians	30	-60	0.5	$99,750
29-1141	Registered Nurses	1,750	230	0.7	$68,857
29-1171	Nurse Practitioners	50	-20	0.3	$120,580
29-2010	Clinical Laboratory Technologists and Technicians	120	n/a	0.4	$52,981
29-2021	Dental Hygienists	220	100	1.2	$92,502
29-2031	Cardiovascular Technologists and Technicians	30	10	0.6	$68,735
29-2032	Diagnostic Medical Sonographers	80	40	1.3	$72,753
29-2033	Nuclear Medicine Technologists	10	-20	0.6	$83,546
29-2034	Radiologic Technologists and Technicians	270	120	1.5	$66,181
29-2041	Emergency Medical Technicians and Paramedics	80	n/a	0.4	$53,290
29-2052	Pharmacy Technicians	260	-160	0.7	$32,676
29-2053	Psychiatric Technicians	90	n/a	1.5	$33,119
29-2055	Surgical Technologists	30	n/a	0.3	$52,968
29-2061	Licensed Practical and Licensed Vocational Nurses	440	40	0.7	$56,272
29-2071	Medical Records and Health Information Technicians	140	60	0.8	$47,350
29-2099	Health Technologists and Technicians, All Other	250	130	2.3	$29,076
29-9011	Occupational Health and Safety Specialists	70	10	0.9	$88,749
29-9099	Healthcare Practitioners and Technical Workers, All Other	40	0	1.4	$35,288

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
31-0000	Healthcare Support Occupations	3,140	460	0.9	$33,557
31-1014	Nursing Assistants	1,410	140	1.1	$31,732
31-2021	Physical Therapist Assistants	70	n/a	0.9	$55,727
31-9091	Dental Assistants	250	50	0.9	$38,866
31-9092	Medical Assistants	550	170	1.0	$34,153
31-9093	Medical Equipment Preparers	10	n/a	0.2	$34,174
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	60	-20	0.8	$23,132
31-9097	Phlebotomists	50	0	0.5	$30,697
31-9099	Healthcare Support Workers, All Other	170	130	2.2	$38,125
33-0000	Protective Service Occupations	2,090	90	0.7	$55,704
33-1011	First-Line Supervisors of Correctional Officers	60	10	1.6	$76,826
33-1012	First-Line Supervisors of Police and Detectives	330	80	3.3	$94,148
33-1021	First-Line Supervisors of Fire Fighting and Prevention Workers	20	n/a	0.4	$75,427
33-1099	First-Line Supervisors of Protective Service Workers, All Other	40	20	0.6	$69,279
33-2011	Firefighters	90	-10	0.3	$56,228
33-3011	Bailiffs	80	60	5.0	$56,521
33-3012	Correctional Officers and Jailers	190	60	0.5	$52,523
33-3021	Detectives and Criminal Investigators	20	-20	0.2	$88,907
33-3051	Police and Sheriff's Patrol Officers	450	-110	0.8	$61,330
33-9032	Security Guards	510	30	0.5	$37,937
33-9092	Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	110	-20	0.9	$20,289
33-9099	Protective Service Workers, All Other	140	10	1.2	$27,335
35-0000	Food Preparation and Serving-Related Occupations	12,670	1,070	1.1	$24,525
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	1,130	30	1.4	$33,087
35-2011	Cooks, Fast Food	310	-500	0.7	$25,155
35-2012	Cooks, Institution and Cafeteria	240	90	0.7	$31,222
35-2014	Cooks, Restaurant	1,390	640	1.2	$27,188
35-2021	Food Preparation Workers	580	-270	0.8	$25,076
35-3011	Bartenders	740	480	1.4	$21,360
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	1,690	340	0.5	$24,073
35-3031	Waiters and Waitresses	2,750	520	1.3	$20,776
35-3041	Food Servers, Nonrestaurant	240	120	1.1	$25,197
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	500	150	1.3	$23,020
35-9021	Dishwashers	910	320	2.1	$23,048

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	940	380	2.6	$24,416
37-0000	Building and Grounds Cleaning and Maintenance Occupations	3,160	940	0.8	$32,303
37-1011	First-Line Supervisors of Housekeeping and Janitorial Workers	260	120	2.0	$52,961
37-1012	First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	150	70	1.7	$46,480
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,420	720	0.8	$30,876
37-2012	Maids and Housekeeping Cleaners	540	-40	0.7	$23,368
37-2021	Pest Control Workers	50	n/a	0.8	$34,801
37-3011	Landscaping and Groundskeeping Workers	680	120	0.9	$31,372
37-3019	Grounds Maintenance Workers, All Other	40	n/a	3.2	$27,424
39-0000	Personal Care and Service Occupations	4,120	200	0.9	$27,706
39-1021	First-Line Supervisors of Personal Service Workers	280	130	1.4	$40,186
39-2021	Nonfarm Animal Caretakers	180	-140	1.1	$25,119
39-3091	Amusement and Recreation Attendants	450	300	1.7	$21,627
39-4021	Funeral Attendants	40	n/a	1.3	$25,722
39-4031	Morticians, Undertakers, and Funeral Directors	20	n/a	0.9	$54,386
39-5012	Hairdressers, Hairstylists, and Cosmetologists	700	-220	2.2	$29,359
39-5093	Shampooers	130	10	11.1	$20,875
39-9011	Childcare Workers	510	-160	1.1	$23,113
39-9021	Personal Care Aides	790	0	0.4	$24,159
39-9031	Fitness Trainers and Aerobics Instructors	160	n/a	0.6	$45,629
39-9032	Recreation Workers	170	60	0.6	$28,594
39-9041	Residential Advisors	150	90	1.6	$29,666
41-0000	Sales and Related Occupations	12,940	-40	1.0	$33,171
41-1011	First-Line Supervisors of Retail Sales Workers	1,700	10	1.7	$45,706
41-1012	First-Line Supervisors of Non-Retail Sales Workers	90	20	0.4	$82,226
41-2011	Cashiers	4,410	-470	1.4	$23,927
41-2021	Counter and Rental Clerks	280	-200	0.8	$33,946
41-2022	Parts Salespersons	270	60	1.2	$31,260
41-2031	Retail Salespersons	4,660	430	1.2	$26,157
41-3021	Insurance Sales Agents	210	-70	0.6	$57,681
41-3041	Travel Agents	40	0	0.7	$40,621
41-3099	Sales Representatives, Services, All Other	460	180	0.5	$79,447
41-4011	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific	30	-40	0.1	$98,044
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific	180	-140	0.2	$59,015

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
41-9031	Sales Engineers	30	n/a	0.5	$146,423
43-0000	Office and Administrative Support Occupations	14,850	-2,120	0.8	$39,089
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1,480	380	1.2	$54,445
43-2011	Switchboard Operators, Including Answering Service	30	-40	0.5	$31,170
43-3011	Bill and Account Collectors	40	-40	0.2	$43,273
43-3021	Billing and Posting Clerks and Machine Operators	220	10	0.6	$39,951
43-3031	Bookkeeping, Accounting, and Auditing Clerks	840	80	0.6	$44,669
43-3051	Payroll and Timekeeping Clerks	50	-70	0.4	$49,464
43-3061	Procurement Clerks	90	30	1.6	$48,778
43-3071	Tellers	320	-180	0.8	$33,581
43-4031	Court, Municipal, and License Clerks	70	30	0.6	$47,269
43-4051	Customer Service Representatives	1,590	360	0.6	$34,891
43-4071	File Clerks	70	-30	0.7	$34,291
43-4081	Hotel, Motel, and Resort Desk Clerks	280	40	1.3	$23,187
43-4111	Interviewers, Except Eligibility and Loan	110	n/a	0.7	$34,536
43-4121	Library Assistants, Clerical	80	-20	1.1	$27,793
43-4151	Order Clerks	20	-20	0.1	$33,249
43-4161	Human Resources Assistants, Except Payroll and Timekeeping	200	60	1.9	$42,201
43-4171	Receptionists and Information Clerks	1,000	0	1.1	$33,009
43-4199	Information and Record Clerks, All Other	70	-50	0.5	$47,068
43-5031	Police, Fire, and Ambulance Dispatchers	80	10	1.0	$45,499
43-5032	Dispatchers, Except Police, Fire, and Ambulance	60	-60	0.4	$42,950
43-5051	Postal Service Clerks	130	40	1.9	$50,110
43-5052	Postal Service Mail Carriers	400	180	1.4	$47,208
43-5053	Postal Service Mail Sorters, Processors, and Processing Machine Operators	20	-20	0.2	$48,764
43-5061	Production, Planning, and Expediting Clerks	140	-60	0.5	$54,520
43-5071	Shipping, Receiving, and Traffic Clerks	180	-240	0.3	$31,394
43-5081	Stock Clerks and Order Fillers	1,870	-400	1.1	$28,571
43-5111	Weighers, Measurers, Checkers, and Samplers, Recordkeeping	20	-20	0.4	$38,838
43-6011	Executive Secretaries and Executive Administrative Assistants	420	-190	0.9	$64,042
43-6012	Legal Secretaries	70	n/a	0.5	$48,570
43-6013	Medical Secretaries	470	-80	0.9	$35,457
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2,600	-530	1.4	$38,502
43-9011	Computer Operators	20	-120	0.7	$87,774

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
43-9021	Data Entry Keyers	60	-260	0.4	$75,864
43-9051	Mail Clerks and Mail Machine Operators, Except Postal Service	80	-260	1.1	$69,080
43-9061	Office Clerks, General	2,900	-1,140	1.1	$72,094
43-9199	Office and Administrative Support Workers, All Other	180	-120	1.1	$87,484
47-0000	Construction and Extraction Occupations	5,370	10	1.1	$52,073
47-1011	First-Line Supervisors of Construction Trades and Extraction Work	780	350	1.5	$82,364
47-2021	Brickmasons and Blockmasons	140	80	2.6	$65,109
47-2031	Carpenters	760	120	1.2	$50,494
47-2051	Cement Masons and Concrete Finishers	70	0	0.4	$50,639
47-2061	Construction Laborers	790	20	0.9	$33,451
47-2073	Operating Engineers and Other Construction Equipment Operators	260	-150	0.8	$49,910
47-2111	Electricians	740	0	1.3	$56,161
47-2121	Glaziers	100	n/a	2.3	$49,638
47-2141	Painters, Construction and Maintenance	240	-130	1.2	$44,195
47-2152	Plumbers, Pipefitters, and Steamfitters	180	-210	0.5	$63,348
47-2221	Structural Iron and Steel Workers	50	-90	0.8	$43,188
47-3011	Helpers--Brickmasons, Blockmasons, Stonemasons, and Tile and Marble Setters	20	-20	1.0	$35,061
47-3019	Helpers, Construction Trades, All Other	60	n/a	2.7	$31,118
47-4011	Construction and Building Inspectors	160	n/a	1.8	$80,488
47-4090	Miscellaneous Construction and Related Workers	30	n/a	1.1	$36,361
49-0000	Installation, Maintenance, and Repair Occupations	6,720	310	1.4	$58,137
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	830	220	2.1	$67,687
49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	180	n/a	0.9	$57,460
49-3021	Automotive Body and Related Repairers	130	-40	1.1	$55,224
49-3023	Automotive Service Technicians and Mechanics	750	-360	1.4	$54,616
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	60	-90	0.3	$58,032
49-3053	Outdoor Power Equipment and Other Small Engine Mechanics	50	-20	1.8	$51,667
49-3093	Tire Repairers and Changers	180	50	1.9	$24,708
49-9012	Control and Valve Installers and Repairers, Except Mechanical Door	70	30	1.6	$67,436
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	460	40	1.7	$49,320
49-9041	Industrial Machinery Mechanics	70	-20	0.2	$67,271
49-9043	Maintenance Workers, Machinery	20	n/a	0.3	$42,342
49-9071	Maintenance and Repair Workers, General	1,080	-180	0.9	$45,839
49-9098	Helpers--Installation, Maintenance, and Repair Workers	340	90	3.8	$31,151

SOC	Description	2018 Jobs	2013–2018 Change	2018 LQ	Avg. Annual Wages
49-9099	Installation, Maintenance, and Repair Workers, All Other	120	-150	0.9	$49,372
51-0000	Production Occupations	1,920	-700	0.2	$45,705
51-1011	First-Line Supervisors of Production and Operating Workers	220	-50	0.4	$66,686
51-2028	Electrical, electronic, and electromechanical assemblers, except coil winders, tapers	30	n/a	0.1	$56,489
51-2041	Structural Metal Fabricators and Fitters	20	n/a	0.3	$59,989
51-2098	Assemblers and fabricators, all other, including team assemblers	180	n/a	0.2	$32,048
51-3011	Bakers	60	-40	0.4	$29,723
51-3021	Butchers and Meat Cutters	50	-120	0.4	$37,827
51-4041	Machinists	70	40	0.2	$60,480
51-4121	Welders, Cutters, Solderers, and Brazers	90	40	0.3	$49,911
51-5111	Prepress Technicians and Workers	30	n/a	1.2	$45,838
51-5112	Printing Press Operators	70	10	0.5	$48,993
51-6011	Laundry and Dry-Cleaning Workers	130	-150	0.7	$24,526
51-8031	Water and Wastewater Treatment Plant and System Operators	130	50	1.2	$41,153
51-8099	Plant and System Operators, All Other	30	10	2.9	$63,870
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	80	-60	0.2	$64,022
51-9071	Jewelers and Precious Stone and Metal Workers	10	n/a	0.5	$46,930
51-9196	Paper Goods Machine Setters, Operators, and Tenders	40	n/a	0.5	$26,467
51-9198	Helpers--Production Workers	70	-30	0.2	$27,055
51-9199	Production Workers, All Other	90	70	0.5	$31,967
53-0000	Transportation and Material Moving Occupations	5,550	200	0.6	$36,764
53-1048	First-line supervisors of transportation/material moving workers	300	n/a	0.9	$65,384
53-3022	Bus Drivers, School or Special Client	950	120	2.2	$36,228
53-3032	Heavy and Tractor-Trailer Truck Drivers	440	-130	0.3	$44,922
53-3033	Light Truck or Delivery Services Drivers	760	150	1.0	$34,868
53-3041	Taxi Drivers and Chauffeurs	100	-60	0.6	$28,590
53-6031	Automotive and Watercraft Service Attendants	160	20	1.7	$25,127
53-7032	Excavating and Loading Machine and Dragline Operators	120	80	3.1	$46,338
53-7051	Industrial Truck and Tractor Operators	30	-80	0.1	$42,527
53-7061	Cleaners of Vehicles and Equipment	260	-130	0.8	$24,517
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1,000	110	0.4	$30,276
53-7064	Packers and Packagers, Hand	100	-150	0.2	$25,228

Source: Maryland Department of Labor, Southern Maryland Workforce Region Data, Garner Economics