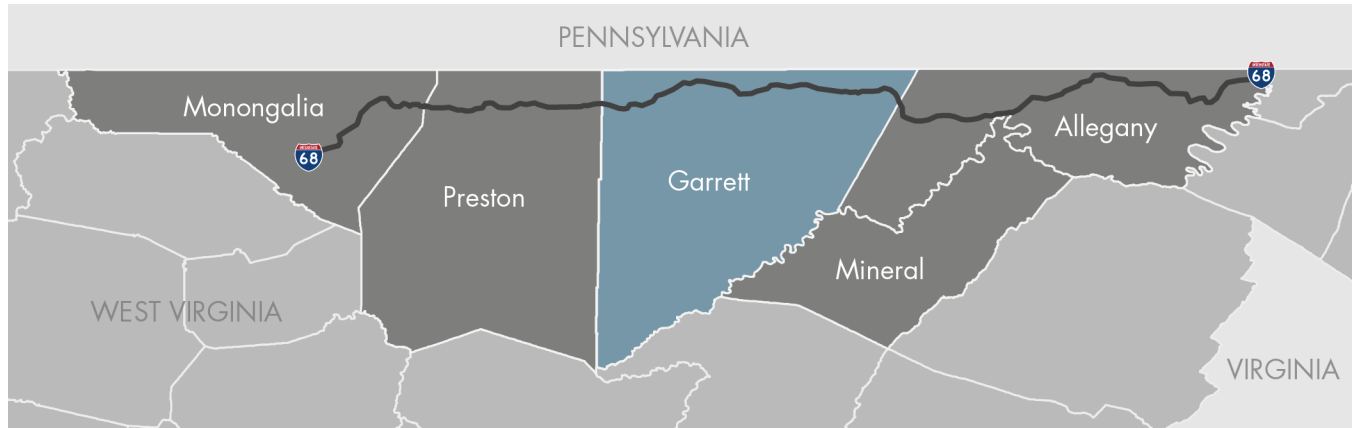


GARRETT COUNTY



Garrett County is the westernmost county in Maryland and the epicenter of outdoor recreation in the I-68 region. The county is home to Deep Creek Lake, Wisp Resort, Savage River State Forest, and the Adventure Sports Center International—the world’s only mountaintop whitewater recirculating course.

Garrett County is equidistant to many major markets by way of Interstate 68 and US 219, which allows for easy transportation of goods to a large portion of the US. The county boasts outstanding healthcare facilities, one of the best K-12 school systems in Maryland, and a higher education scholarship program for students graduating or earning their GED from a Garrett County high school.

Garrett County’s infrastructure can accommodate many types of industries, which can be housed at one of the many county-owned business parks or tracts of available land. The county also offers a low cost of living and a progressive business environment to top off its list of amenities.

STRATEGIC ASSETS & ADVANTAGES

- Optimal highway access via Interstate 68 and US 219)
- Home of Maryland’s largest freshwater lake, only four-season ski resort, and largest state forest
- Unique outdoor recreation assets, including the world’s only mountaintop whitewater recirculating course
- Strong medical facilities; affiliate of WVU Medicine
- Free 2-year tuition for local graduates at Garrett College
- Six community-owned business parks and a large supply of available land
- Ample infrastructure capacity
- Well-regarded school system and strong STEM programs

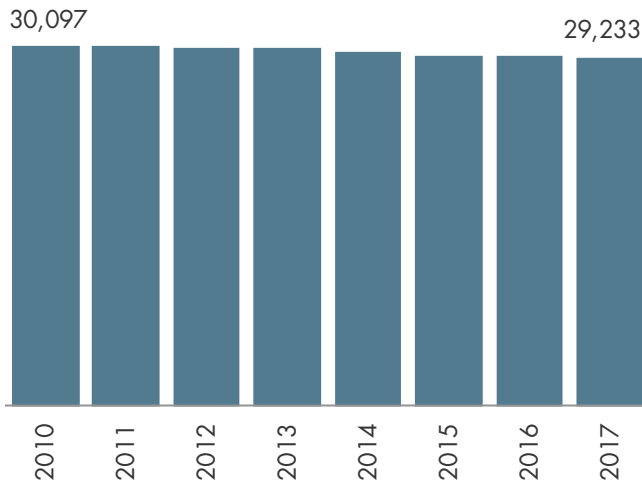
LABOR MARKET OVERVIEW

GEOGRAPHY	CIVILIAN LABOR FORCE	EMPLOYED	UNEMPLOYED	UNEMPLOYMENT RATE
GARRETT COUNTY	15,534	14,734	800	5.2%
I-68	126,672	120,769	5,904	4.7%
MARYLAND	3,219,455	3,086,246	133,209	4.1%

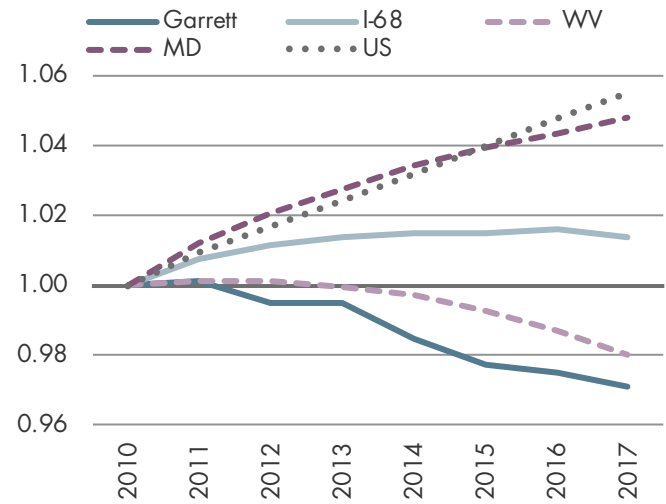
Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics (state and county labor market data); US Census Bureau, Current Population Survey (national labor market data), TIP Strategies

POPULATION

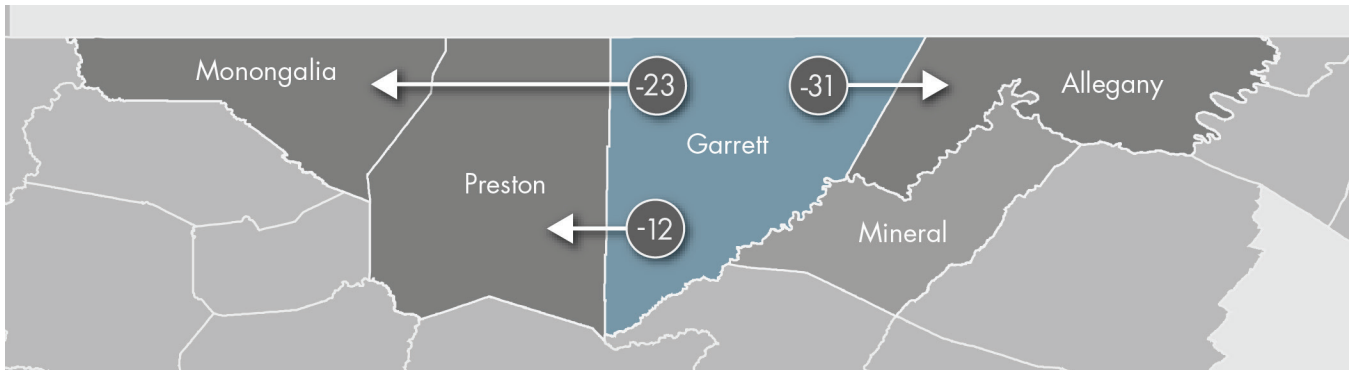
GARRETT POPULATION



COMPARATIVE POPULATION TRENDS



INTERREGIONAL COUNTY-TO-COUNTY MIGRATION FLOW MAP, BY NET FLOWS



LARGEST MIGRATION FLOWS BY COUNTY, TOP COUNTIES PLUS SUMMARY FLOWS

COUNTY	INBOUND	OUTBOUND	NET LOSS/GAIN
Preston, WV	52	64	-12
Monongalia, WV	5	28	-23
Allegany, MD	99	130	-31
Other Flows - Same State	105	92	13
Other Flows - Different State	252	337	-85
Other Flows - Foreign	5	5	0
Total Migration (US & Foreign)	518	656	-138

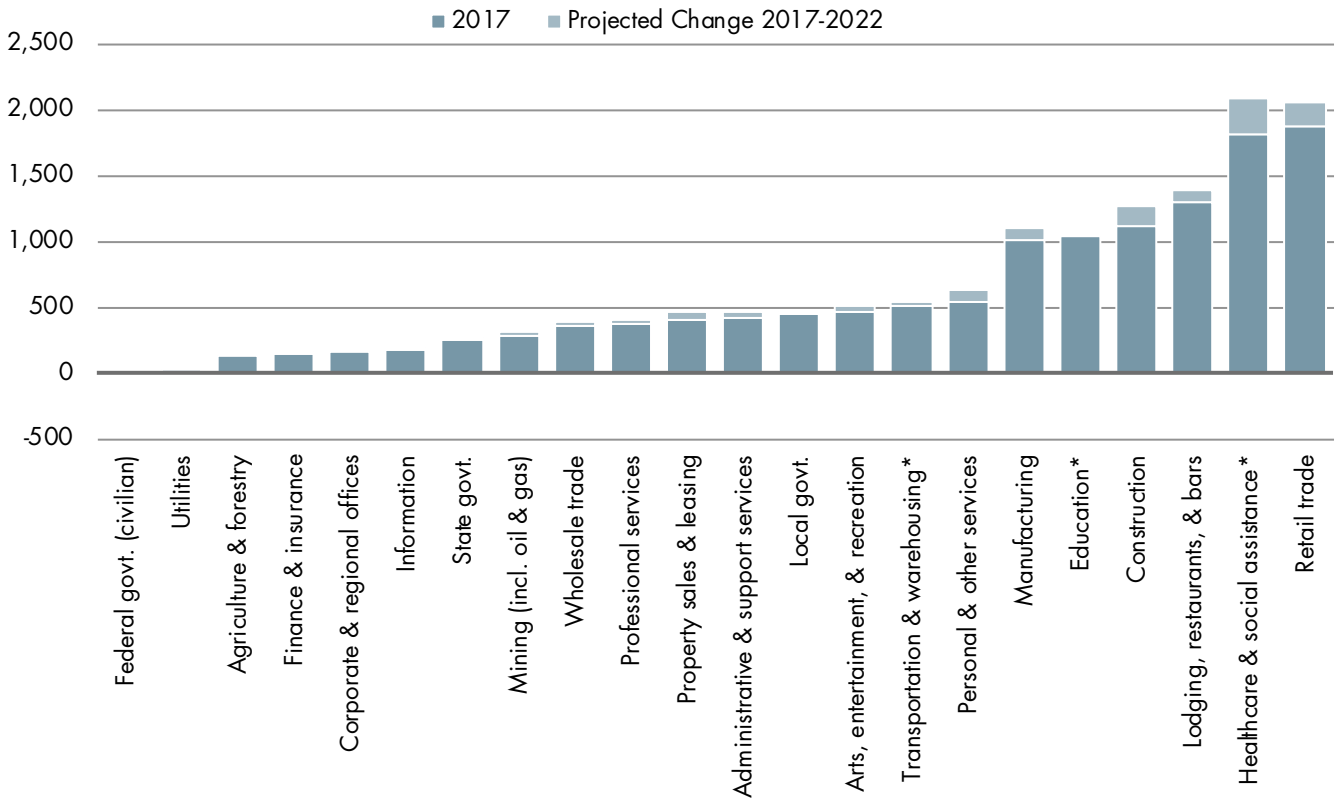
Sources: (top two figures US Census, Population Estimates program; (bottom two figures) Internal Revenue Service, County-to-County Migration data (accessed via Missouri Census Data Center)

Notes: Tax year 2014-2015. Analysis is limited to counties with at least 10 tax returns indicating a move into or out of the county. Inbound/outbound flows below this threshold have been shown as 5 for estimation. Circulation with I-86 counties shown in bold.

INDUSTRY TRENDS

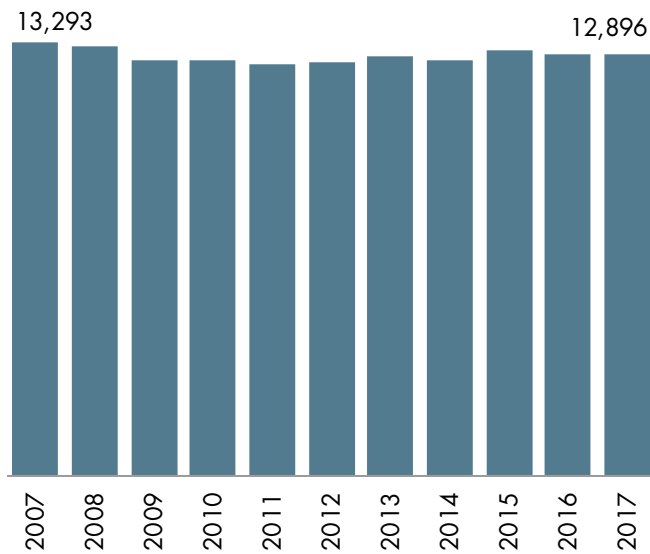
TOTAL EMPLOYMENT BY INDUSTRY

JOB BASE 2016 + PROJECTED 5-YEAR CHANGE



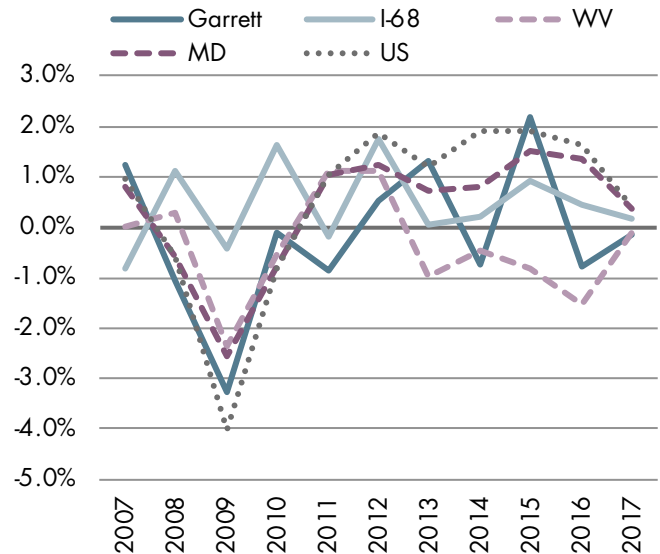
TOTAL COUNTY EMPLOYMENT

2007-2017



COMPARATIVE EMPLOYMENT TRENDS

PERCENT CHANGE FROM PRIOR YEAR, 2007-2017



*Education includes all public schools, colleges, & universities, and healthcare includes all public hospitals. Transportation and warehousing includes USPS. Excludes military and unclassified employment

Source: (all figures this page) EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed

ABOUT LOCATION QUOTIENTS (LQS)

Location quotient analysis is a statistical technique used to suggest areas of relative advantage based on a region’s employment base. LQs are calculated as an industry’s share of total local employment divided by the same industry’s share of employment at the national level:

$$\frac{\text{(local employment in industry x / total local employment -all industries)}}{\text{(national employment in industry x / total national employment-all industries)}}$$

If the local industry and national industry are perfectly proportional, the LQ will be 1.00. LQs greater than 1.25 are presumed to indicate a comparative advantage; those below 0.75 suggest areas of weakness but also point to opportunities for expansion or attraction.

INDUSTRY CONCENTRATION (LQ)

COMPARISON OF GARRETT COUNTY WITH SELECT GEGORAPHIES & US

NAICS Code & Description	Garrett	I-68	West Virginia	Maryland	US
21 Mining (incl. oil & gas)	5.65	2.04	6.65	0.10	1.00
71 Arts, entertainment, & recreation	2.11	0.70	0.63	1.06	1.00
53 Property sales & leasing	1.91	0.82	0.63	1.13	1.00
23 Construction	1.60	0.96	0.92	1.18	1.00
44-45 Retail trade	1.40	1.10	1.16	0.97	1.00
9029 State govt.	1.33	1.70	2.40	1.30	1.00
72 Lodging, restaurants, & bars	1.18	1.20	1.05	0.92	1.00
62 Healthcare & social assistance*	1.06	1.48	1.27	0.99	1.00
48-49 Transportation & warehousing*	1.02	0.76	0.89	0.90	1.00
31-33 Manufacturing	0.99	1.05	0.80	0.45	1.00
9039 Local govt.	0.98	0.77	1.09	0.88	1.00
61 Education*	0.86	1.41	1.00	1.10	1.00
81 Personal & other services	0.86	0.85	0.96	1.03	1.00
55 Corporate & regional offices	0.85	0.75	0.59	0.62	1.00
11 Agriculture & forestry	0.83	0.23	0.42	0.32	1.00
51 Information	0.73	0.76	0.69	0.74	1.00
42 Wholesale trade	0.72	0.48	0.76	0.79	1.00
22 Utilities	0.54	1.16	1.97	0.95	1.00
56 Administrative & support services	0.51	0.57	0.82	0.99	1.00
54 Professional services	0.45	0.57	0.59	1.45	1.00
52 Finance & insurance	0.30	0.44	0.67	0.86	1.00
901199 Federal govt. (civilian)	0.08	1.34	1.89	3.86	1.00

*Education includes all public schools, colleges, & universities, and healthcare includes all public hospitals. Transportation and warehousing includes USPS. Excludes military and unclassified employment.

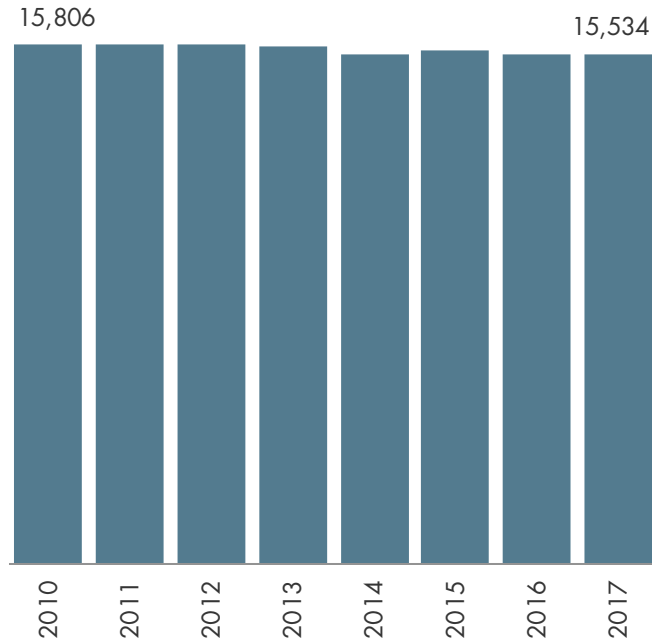
Source: EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Note: LQs greater than 1.25 are presumed to show competitive advantage and are highlighted.

WORKFORCE CHARACTERISTICS

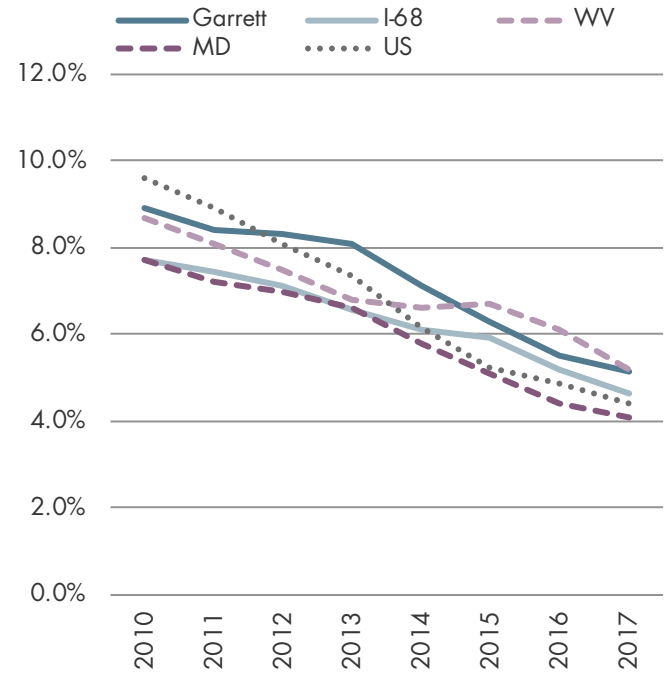
CIVILIAN LABOR FORCE

2010-2017



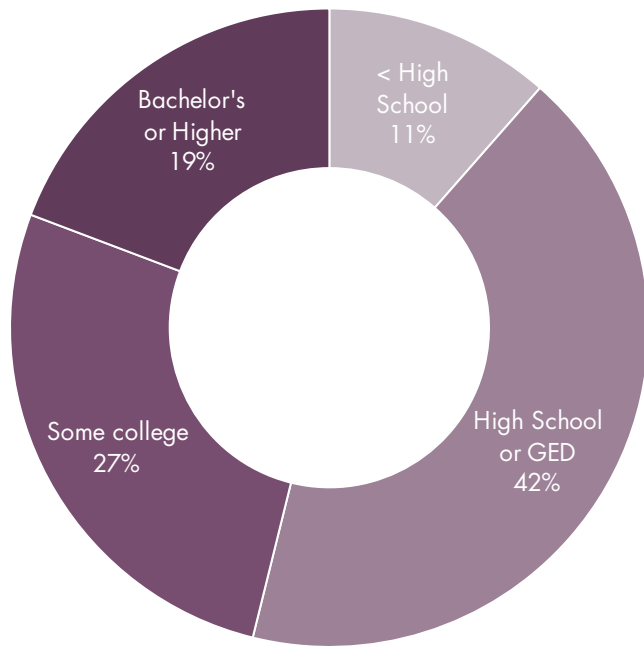
ANNUAL UNEMPLOYMENT RATES

SEASONALLY ADJUSTED, 2010-2017



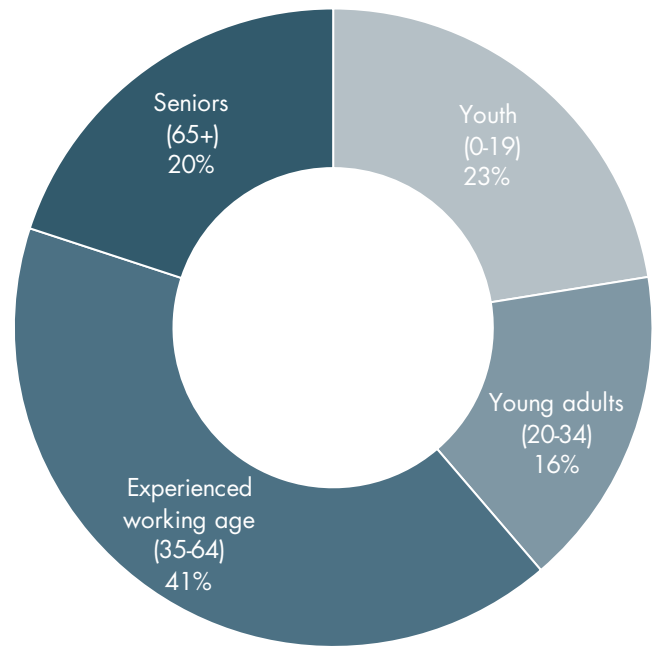
EDUCATIONAL ATTAINMENT

POPULATION 25+



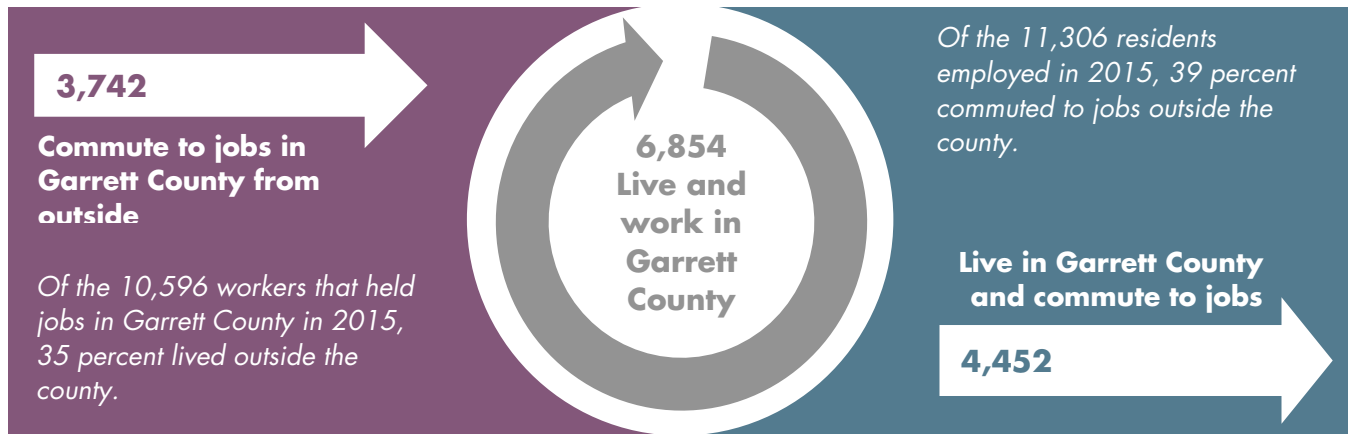
AGE DISTRIBUTION

TOTAL POPULATION



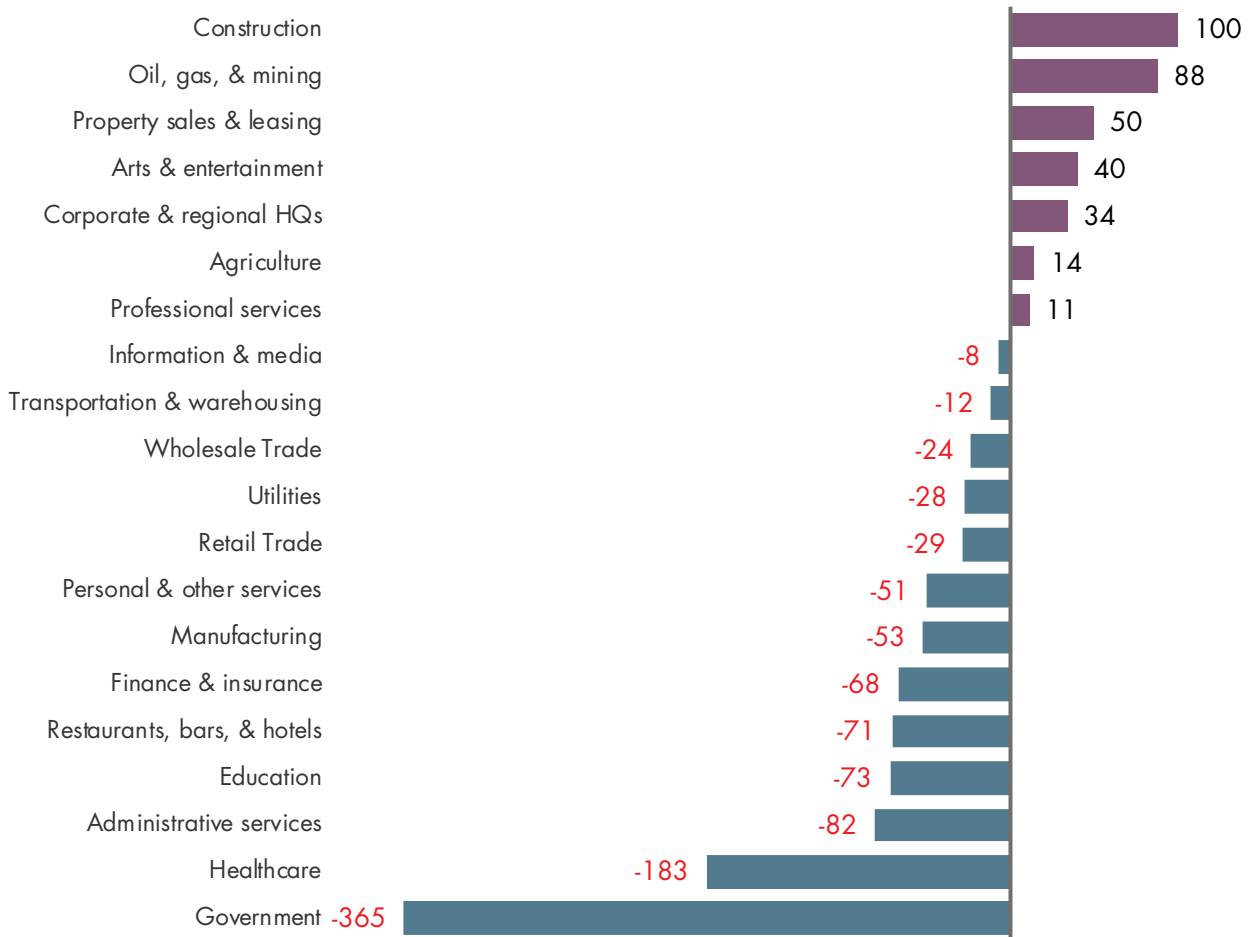
Source: (top two figures) US Bureau of Labor Statistics; (bottom two figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

INFLOW/OUTFLOW, 2015
FLOW OF WORKERS TO/FROM THE COUNTY



COMMUTER FLOWS BY INDUSTRY, 2015

- Net Inbound (net commuting into Garrett County)
- Net Outbound (net commuting out from Garrett County)



Source: (all figures this page): US Census Bureau, Local Employment Dynamics.
Note: (top figure) Overlay arrows are for illustrative purposes and do not indicate directionality of worker flow.

COMMUTER FLOWS BY COUNTY, 2015

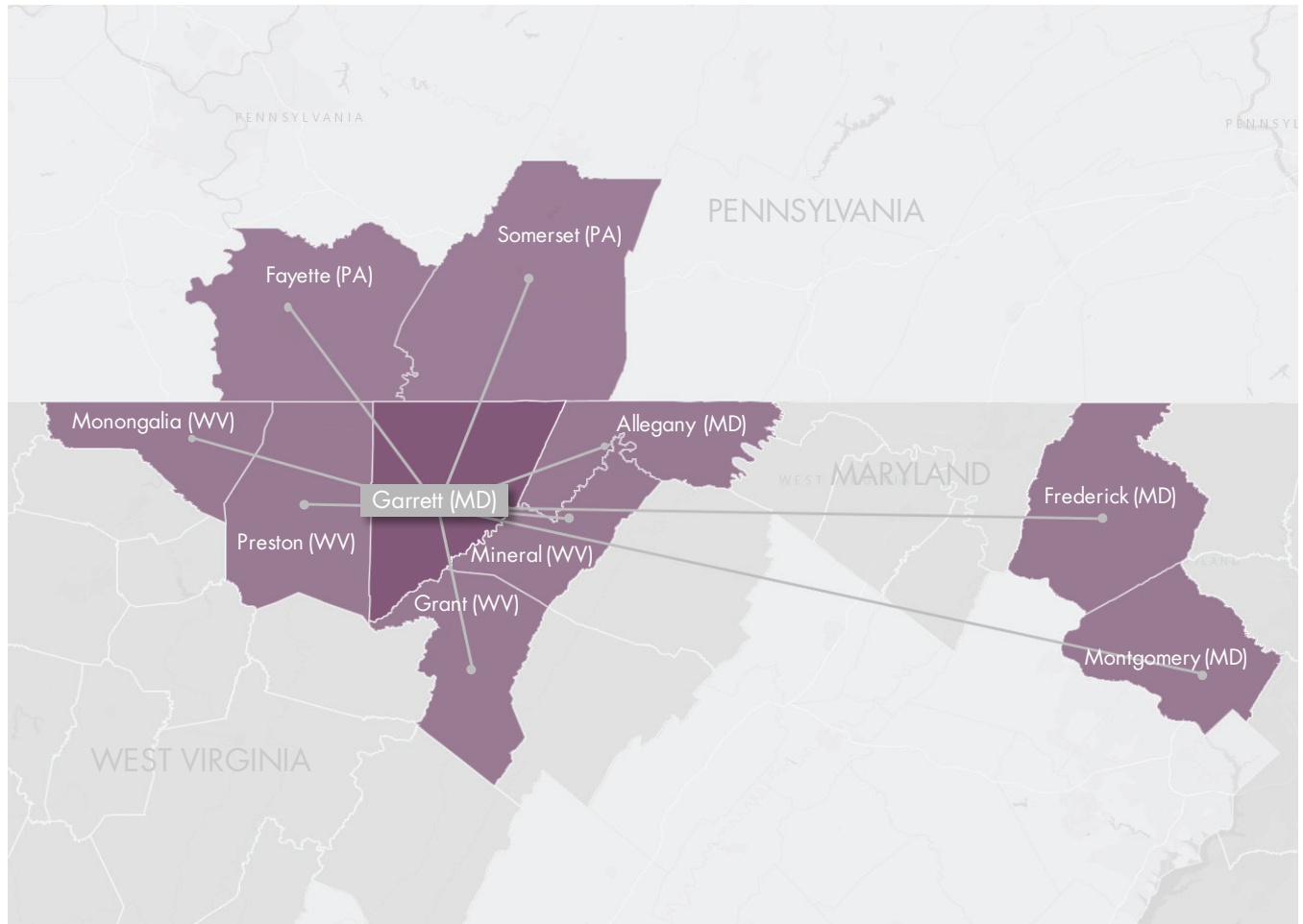
Where Garrett County workers live

County	Count	Share
1 Garrett County, MD	6,854	64.7%
2 Allegany County, MD	753	7.1%
3 Preston County, WV	739	7.0%
4 Somerset County, PA	589	5.6%
5 Mineral County, WV	227	2.1%
6 Grant County, WV	125	1.2%
7 Monongalia County, WV	96	0.9%
8 Fayette County, PA	93	0.9%
9 Montgomery County, MD	82	0.8%
10 Frederick County, MD	73	0.7%
All Other Locations	965	9.1%
Total	10,596	100.0%

Where employed Garrett County residents work

County	Count	Share
1 Garrett County, MD	6,854	60.6%
2 Allegany County, MD	1,272	11.3%
3 Washington County, MD	372	3.3%
4 Baltimore County, MD	225	2.0%
5 Preston County, WV	209	1.8%
6 Baltimore city, MD	208	1.8%
7 Mineral County, WV	193	1.7%
8 Frederick County, MD	192	1.7%
9 Montgomery County, MD	187	1.7%
10 Anne Arundel County, MD	179	1.6%
All Other Locations	1,415	12.5%
Total	11,306	100.0%

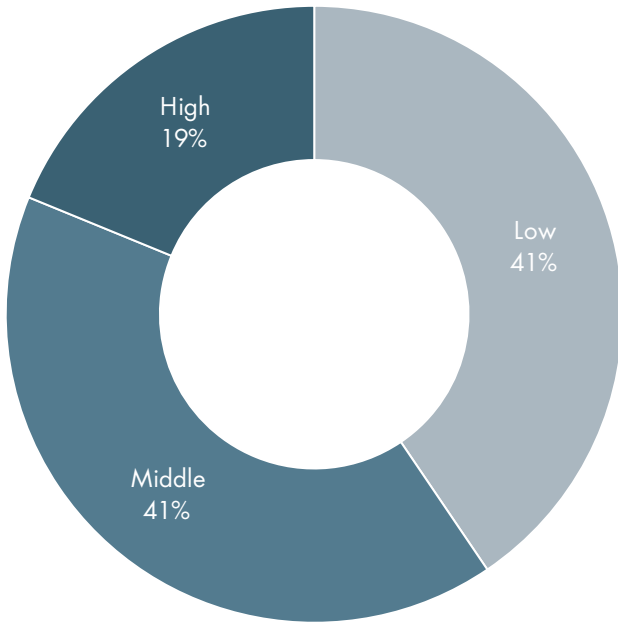
WHERE GARRETT WORKERS LIVE, 2015



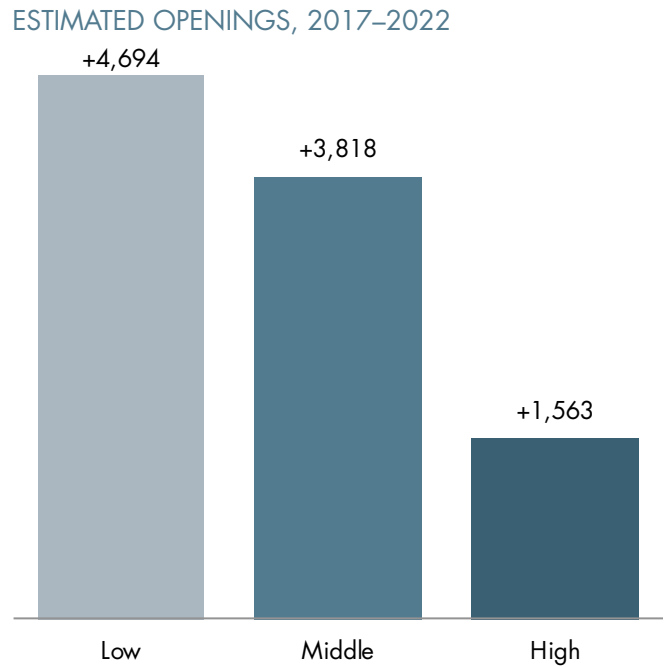
Source: (all figures this page) US Census Bureau, Local Employment Dynamics

DEMAND DRIVERS AND OCCUPATIONAL STRUCTURE

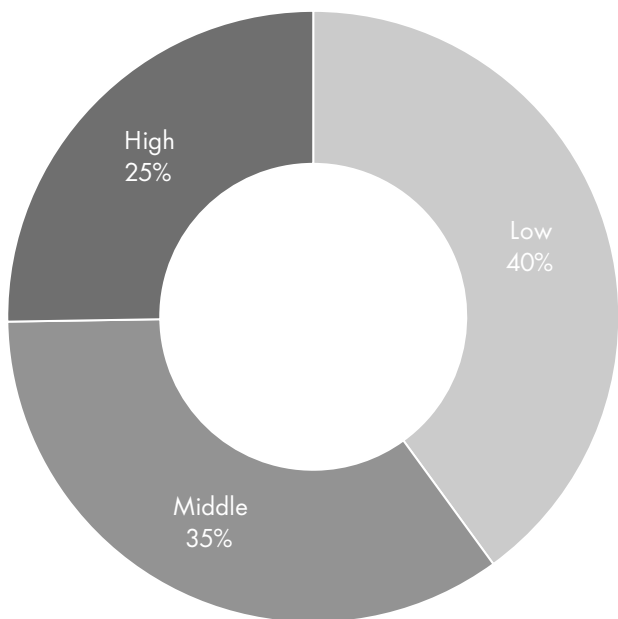
COUNTY EMPLOYMENT BY SKILL LEVEL
PERCENT OF TOTAL EMPLOYMENT, 2017



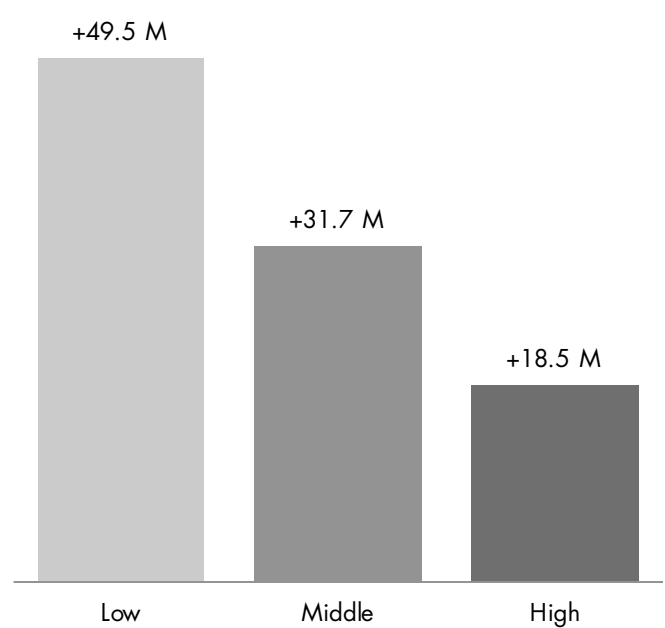
COUNTY OCCUPATIONAL CHANGES BY SKILL LEVEL
ESTIMATED OPENINGS, 2017-2022



US EMPLOYMENT BY SKILL LEVEL
PERCENT OF TOTAL EMPLOYMENT, 2017



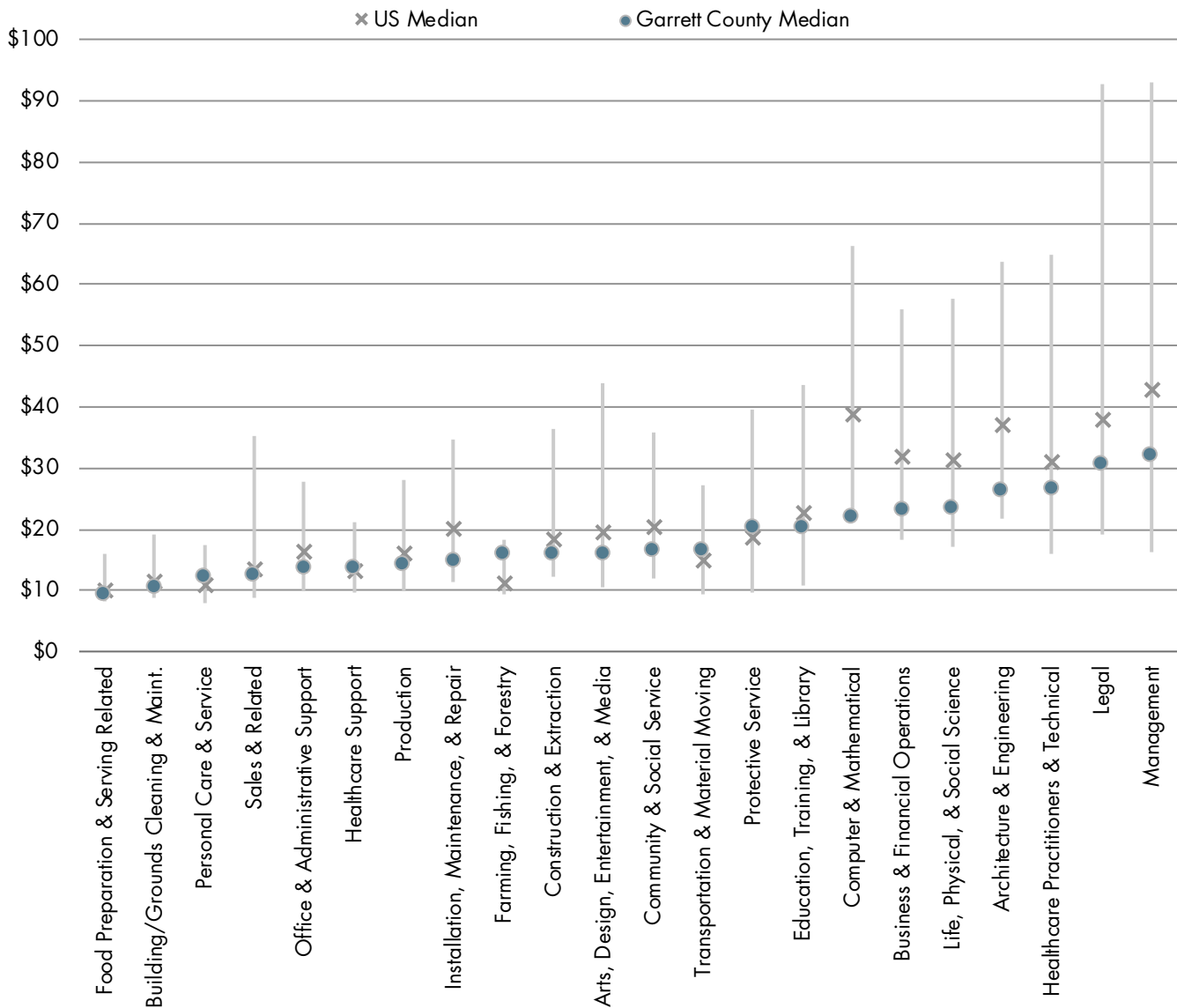
US OCCUPATIONAL CHANGES BY SKILL LEVEL
ESTIMATED OPENINGS, 2017-2022



Source: EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed

COMPARATIVE MEDIAN HOURLY WAGES BY MAJOR OCCUPATIONAL GROUP, 2017

Line = US wage range from the 10th to the 90th percentile



Source: (all figures this page) EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed
 Note: Comparative Median Hourly Wage figures exclude military occupations.

OCCUPATIONAL CONCENTRATION (LQ)

COMPARISON OF GARRETT COUNTY WITH SELECTED GEGORAPHIES & US

SOC Code & Description	Garrett County	I-68	West Virginia	Maryland	US
47 Construction & Extraction	1.69	1.03	1.30	1.04	1.00
49 Installation, Maintenance, & Repair	1.39	1.24	1.33	0.99	1.00
35 Food Preparation & Serving Related	1.32	1.17	1.02	0.90	1.00
31 Healthcare Support	1.28	1.30	1.13	0.98	1.00
37 Building/Grounds Cleaning & Maint.	1.20	0.94	1.00	0.98	1.00
45 Farming, Fishing, & Forestry	1.11	0.35	0.46	0.35	1.00
53 Transportation & Material Moving	1.10	0.85	1.09	0.90	1.00
41 Sales & Related	1.09	0.91	0.97	0.96	1.00
21 Community & Social Service	1.09	1.15	1.15	1.12	1.00
43 Office & Administrative Support	1.06	0.98	1.02	1.00	1.00
25 Education, Training, & Library	0.88	1.25	0.95	1.05	1.00
29 Healthcare Practitioners & Technical	0.88	1.62	1.43	1.10	1.00
11 Management	0.86	0.82	0.82	1.09	1.00
17 Architecture & Engineering	0.81	0.81	0.74	1.26	1.00
51 Production	0.79	0.90	0.88	0.49	1.00
33 Protective Service	0.73	1.20	0.99	1.17	1.00
19 Life, Physical, & Social Science	0.63	1.22	1.02	1.89	1.00
13 Business & Financial Operations	0.60	0.63	0.67	1.19	1.00
39 Personal Care & Service	0.59	0.94	1.04	0.95	1.00
23 Legal	0.59	0.83	1.01	1.22	1.00
27 Arts, Design, Entertainment, & Media	0.42	0.56	0.57	0.92	1.00
15 Computer & Mathematical	0.33	0.61	0.57	1.56	1.00

Source: EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

Note: Excludes military and unclassified employment. LQs greater than 1.25 are presumed to show competitive advantage and are highlighted.

OCCUPATIONAL STRENGTHS

HIGH-DEMAND OCCUPATIONS, RANKED BY # OF JOBS

SOC CODE	DESCRIPTION	2017 Jobs	DEMAND FACTORS			DEMOGRAPHICS		
			Projected Annual Openings (2017-2022)	New jobs	Replacement	Wage Premium over US	% 55-64 Years	% 65+ Years
LOW-SKILL (High school or less)								
41-2011	Cashiers	512	112	8%	92%	0.96	13%	5%
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	334	75	10%	90%	0.98	8%	4%
41-2031	Retail Salespersons	306	53	10%	90%	1.19	21%	11%
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	433	51	5%	95%	0.86	26%	8%
47-2061	Construction Laborers	232	31	13%	87%	1.09	14%	n/a
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	186	28	9%	91%	0.82	23%	10%
MIDDLE-SKILL (More than high school, less than four years)								
31-1014	Nursing Assistants	304	42	12%	88%	1.10	15%	5%
53-3032	Heavy & Tractor-Trailer Truck Drivers	344	41	5%	95%	0.91	22%	9%
49-9071	Maintenance & Repair Workers, General	238	28	12%	88%	0.73	21%	6%

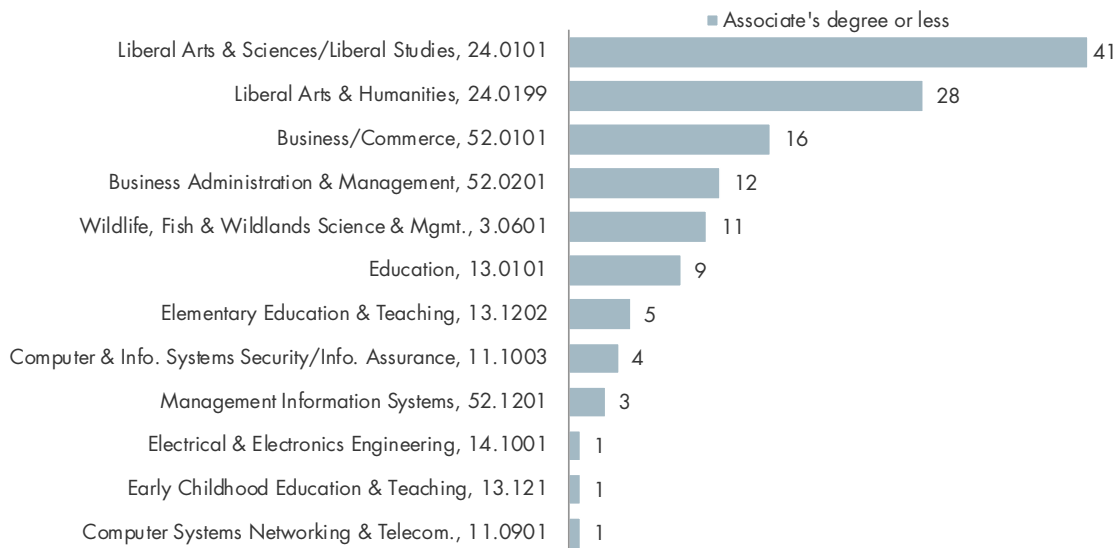
Source: EMSI 2017.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

Notes: Occupations with at least 50 jobs in Allegany County. Wage Premium: Hourly rates more than 10% above US are shaded. Wage premium = 10% or higher than US wages; %55+ = 20% or higher; %65+ = 10% or higher. Replacement demand is the share of open positions due to workers exiting the occupation (retirements, career change, dropping out of the labor force); new jobs are new positions that did not exist previously. Red arrows indicate that there are a high number of workers nearing retirement; over 20% of workers 55-64 year and over 10% of workers 65+ years.

EDUCATION & TRAINING

25 LARGEST FIELDS OF STUDY IN GARRETT COUNTY, 2016

RANKED BY TOTAL NUMBER OF COMPLETIONS



Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS).

Note: IPEDS data include only schools eligible to participate in federal financial aid programs. Figures shown include first and second majors.

STRATEGIC CONSIDERATIONS

The TIP consulting team developed strategic considerations below based on the input of various county stakeholders; a detailed analysis of demographic, economic, and market data; multiple community site visits and windshield tours; key findings from a review of relevant studies; and TIP Strategies' 20 years of experience working with communities across the country.

1.1. Business Retention & Expansion. Respond to the needs of existing businesses to help them stay and grow in Garrett County.

1.1.1. Support the continued successful operations of Beitzel, Wisp Resort, First United Corporation, and ClosetMaid, and other large employers to capitalize on their unique opportunities for economic development in Garrett County.

1.1.2. Work with the Chamber of Commerce and the MD Department of Commerce to expand the region's business visitation program.

1.1.3. Set goals to meet with a specific number of employers each quarter. Structure the employer visits to gain a qualitative understanding of the challenges faced by local businesses operating in Garrett County.

1.1.4. Prioritize business visits using employer size, growth rates, and lease expiration dates.

1.1.5. Increase networking among local entrepreneurs, business executives, HR managers, and other local leaders to build a supportive culture among the Garrett County business community.

1.2. Business Recruitment. Recruit new companies and investments into the community, focusing on target sectors that align with Garrett County's assets.

1.2.1. Convene a group of local company heads who are willing to tap into their networks and help Garrett County with recruitment.

1.2.2. Package and promote the story of Garrett County's potential as a destination for business growth and investment.

1.2.3. Focus the community's marketing and business recruitment efforts on target industries and companies that align well with local assets and opportunities.

1.2.4. Promote Garrett County as a great location for manufacturing firms seeking a relatively "out-of-the-way" location for production facilities. Certain businesses and industries require locations with large areas separated from residential uses.

1.2.5. Work with regional economic development partners to build relationships with commercial real estate brokers, site location consultants, and other business "influencers" in Morgantown, Pittsburgh, Baltimore, and Washington, DC.

1.2.6. Actively manage and influence the image of Garrett County portrayed through online and social media channels. As part of this strategy, ensure that Garrett County's entry on Wikipedia is regularly updated with accurate and positive information since this is often the first (and sometimes only) source of information people use to learn about a community. Also, work with local organizations to use Facebook, Twitter, and other social media tools to provide up-to-date information about local businesses, developments, upcoming events, and other relevant information.

- 1.3. Talent retention & attraction.** Focus on initiatives and projects that make Garrett County a destination for talent in support of the community’s science, engineering, and technical workforce needs.
 - 1.3.1.** Launch a Garrett County civic leadership program that brings together the area’s young professionals, emerging leaders, and existing business and community leaders to discuss local challenges and opportunities impacting the community. Connect this program to similar efforts across other I-68 communities.
 - 1.3.2.** Establish a county-wide young professionals group to encourage collaboration, networking, and relationship building among the area’s young adults.
 - 1.3.3.** Encourage county-wide investments in amenities and recreational infrastructure (e.g., parks, playgrounds, splash pads, hike/bike trails, dog runs) that will enhance Garrett County’s appeal as a place to live.
- 1.4. Small business development.** Strengthen the resources and support systems needed to encourage small business development, entrepreneurship, and innovation in Garrett County.
 - 1.4.1.** Expand access to capital for new and growing businesses in Garrett County. Work with local banks, financial services firms, and other professional services firms to pursue initiatives aimed at increasing the availability of capital for small businesses in the area.
 - 1.4.2.** Leverage the community’s pool of executives with second homes, highly skilled retirees, and business leaders to support the growth of local small businesses through business coaching, mentoring, and networking.
- 1.5. Sites & infrastructure.** Ensure that appropriate real estate options and infrastructure are available to support the growth of existing employers and recruitment of new businesses.
 - 1.5.1.** Support initiatives aimed at developing the community’s broadband internet infrastructure.
- 1.6. Tourism & visitor attraction.** Elevate the role of tourism in greater Garrett County to bring in more visitors, generate more spending for local businesses, and enhance the community’s image.
 - 1.6.1.** Promote the success of various Garrett County community events. Work with local organizations to better connect local businesses with visitors that come to the area during these events.
 - 1.6.2.** Bring together a group of leaders from Garrett County’s hospitality sector (tourist destinations, hotels, and restaurants) to identify opportunities to leverage the area’s visitor amenities to support broader economic development outcomes, including the attraction of businesses, talented workers, and capital investments.