Eastern Shore Economic Resiliency Toolkit

CAROLINE COUNTY ECONOMIC SYMPOSIUM

JUNE 2, 2022

- The Eastern Shore Economic Recovery Project is an effort that brings local economic and workforce development professionals together with data visualization specialist to create data-driven tools and educate local governments, businesses, and organizations on how to use the tools for economic recovery.
- The two-year project was launched in July 2020 in response to the COVID-19 pandemic and is delivering a suite of tools to assist decision makers in their recovery efforts. It is funded by the Economic Development Administration and managed by the Mid-Shore Regional Council and the Tri-County Council for the Lower Eastern Shore of Maryland.

Goals

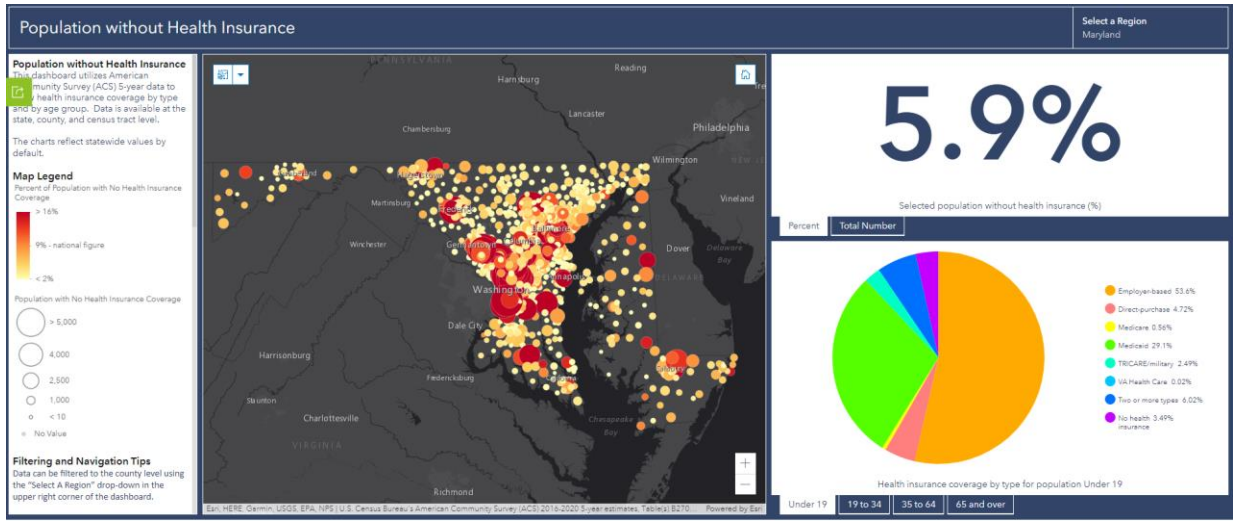
- Better understand and mitigate the economic impacts of COVID-19 on Maryland's Eastern Shore.
- Build data exploration tools to characterize the economic and cultural upheaval caused by the pandemic.
- Assist in the creation of data-driven strategies to help the region recover from the economic shock and build additional resiliency against future disruptions.
- Promote and educate economic and workforce partners on the value and usefulness of the data exploration tools

Data Driven Solutions

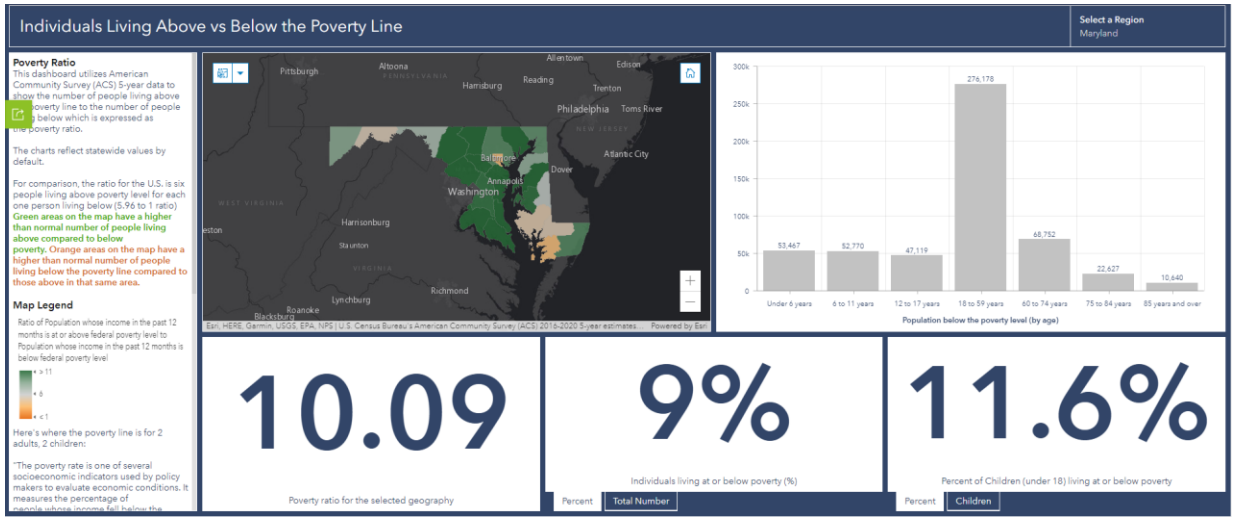
- Central website
  - Dashboards, Web mapping applications, and Infographics visualizing demographic and socioeconomic information about our communities
- Tax Revenue Dashboards
  - Suite of dashboards based on Maryland Comptroller sales and use tax data to highlight yearly, regional and market trends
- Business Sentiment Survey
  - Dashboard, Summary Report and Infographics aimed at engaging with local businesses to gain insight on a range of topics including workforce, wages, business conditions, barriers to success, and strategies for improvement.
- Tourism Dashboard
  - Dashboards visualizing trends within Maryland's tourism economy

www.recovery.delmarvaindex.org

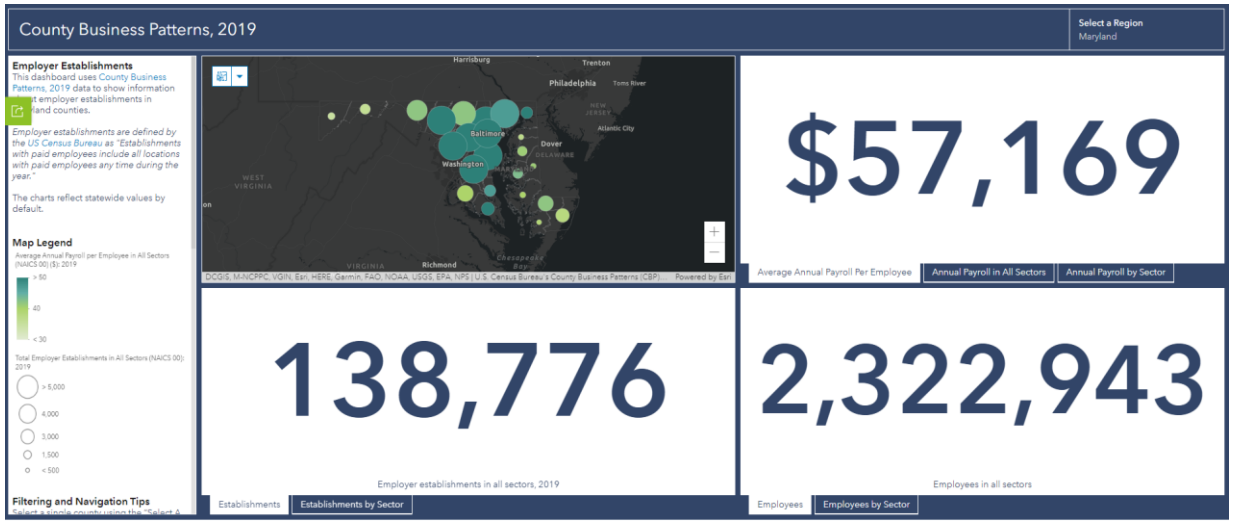
https://recovery.delmarvaindex.org/



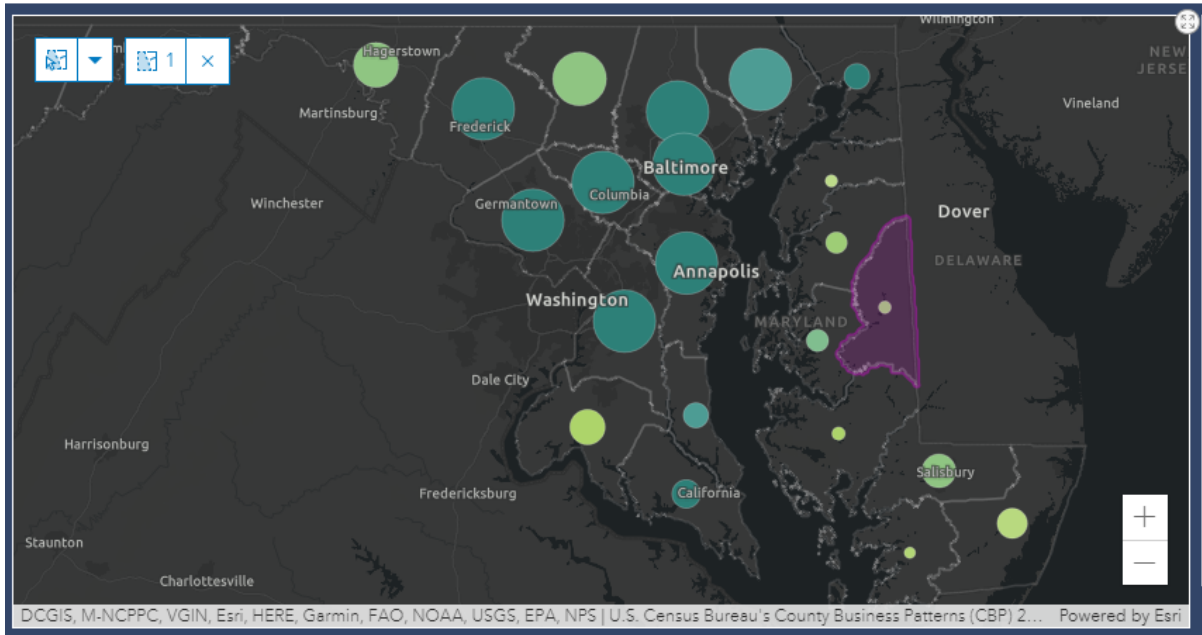
Population without Heath Insurance



Individuals Living Above vs Below the Poverty Line



County Business Patterns, 2019



$40,751

Avg Annual Payroll

Average Annual Payroll Per Employee | Annual Payroll in All Sectors | Annual Payroll by Sector

611

Establishments

Employer establishments in all sectors, 2019

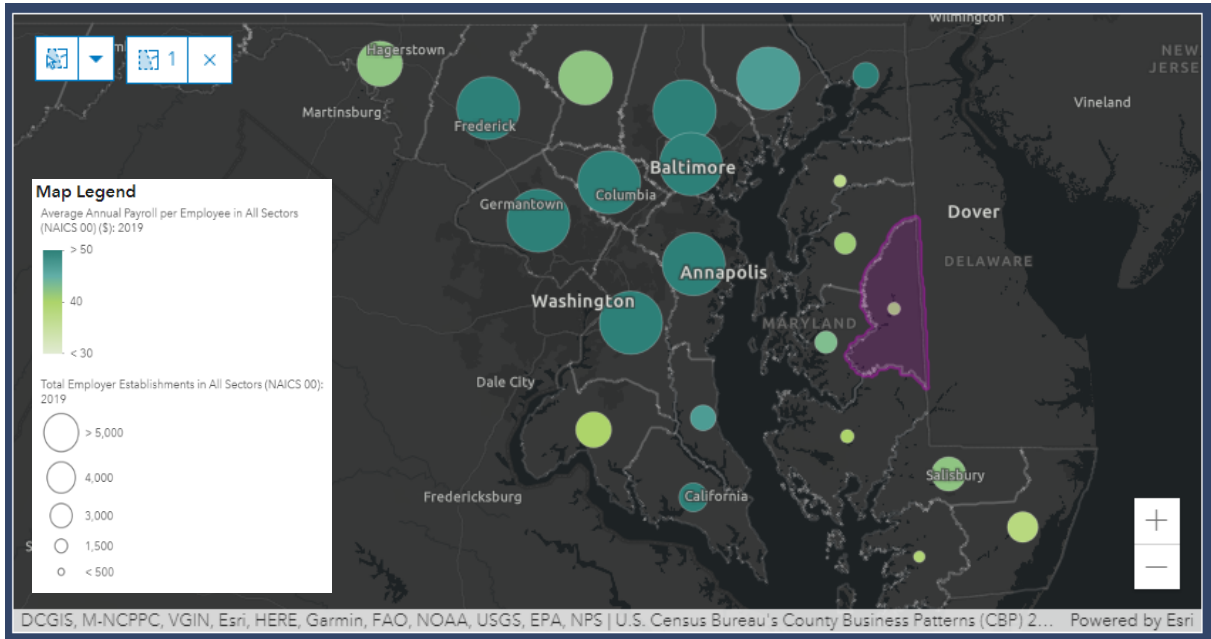
Establishments | Establishments by Sector

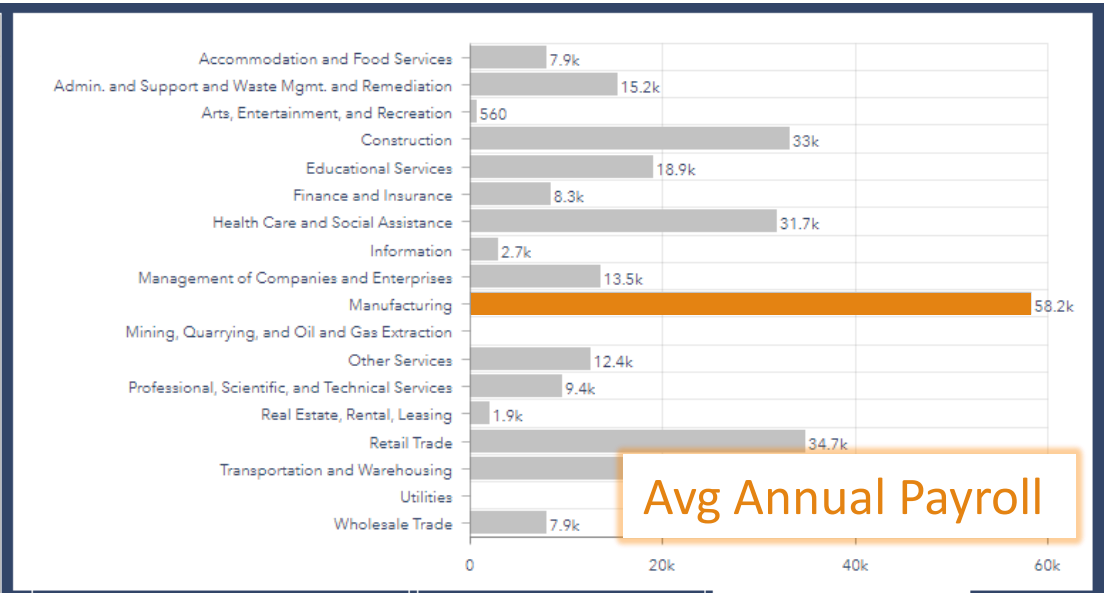
7,426

Employees

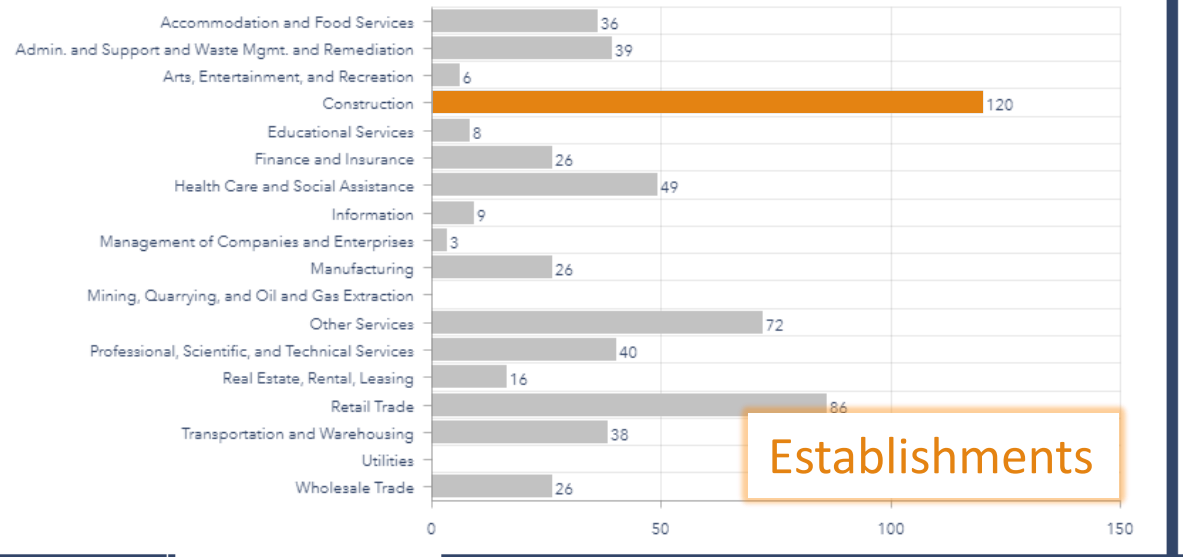
Employees in all sectors

Employees | Employees by Sector

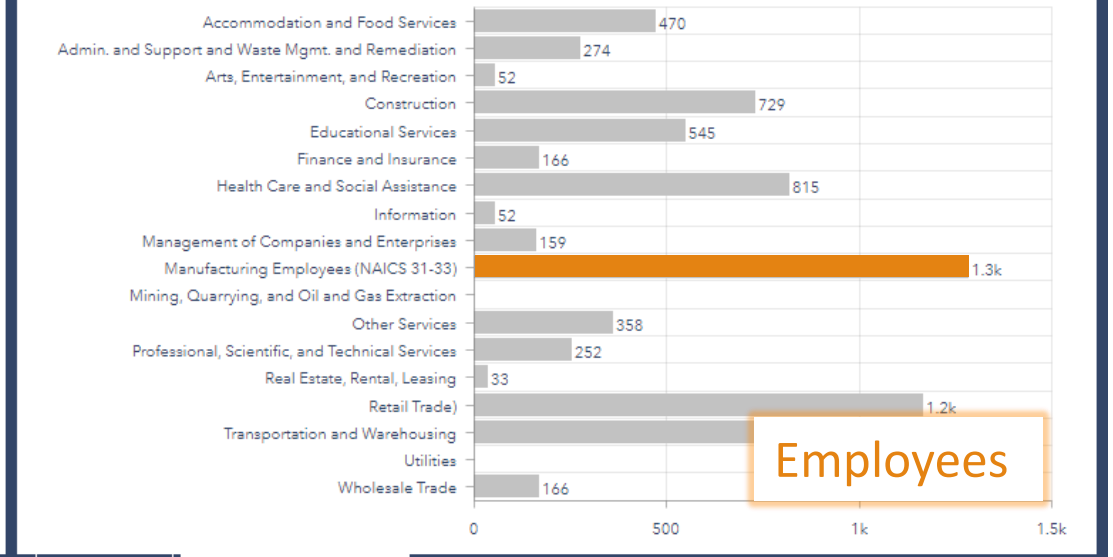




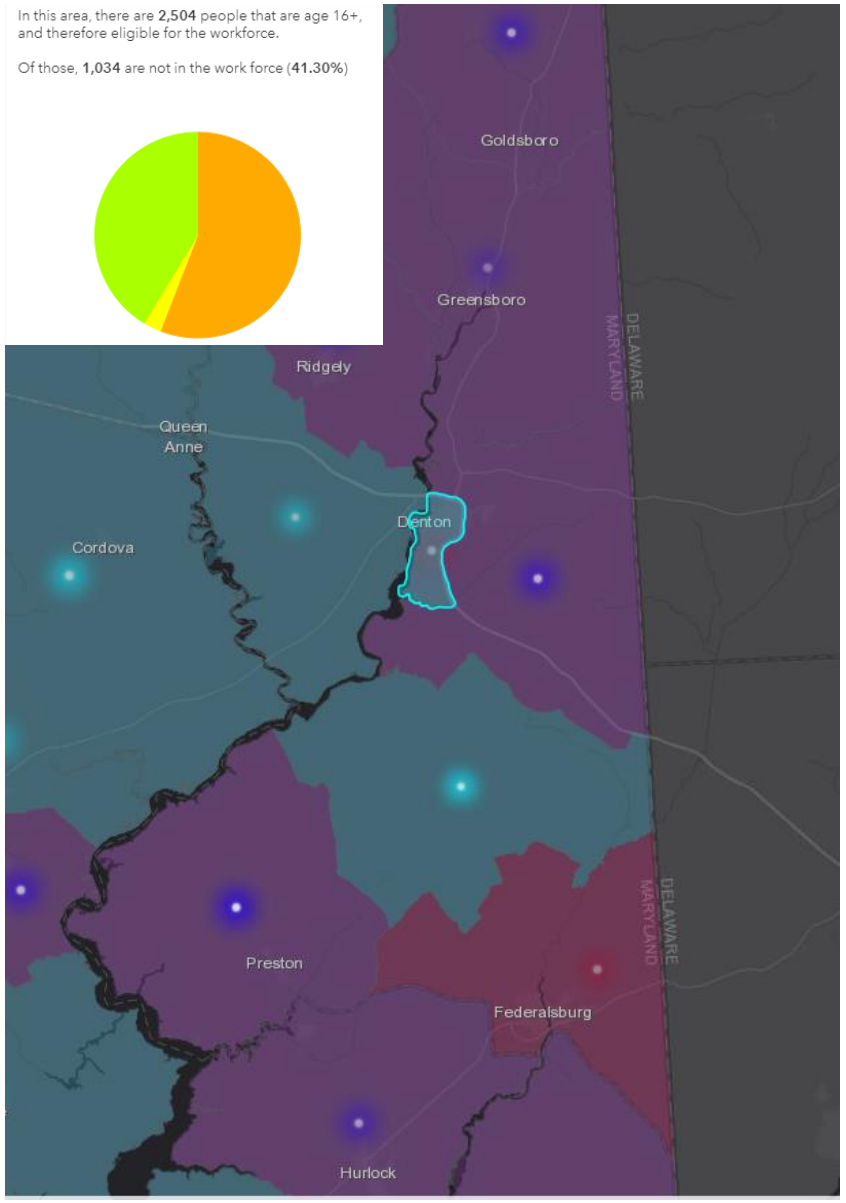
Average Annual Payroll Per Employee | Annual Payroll in All Sectors | Annual Payroll by Sector



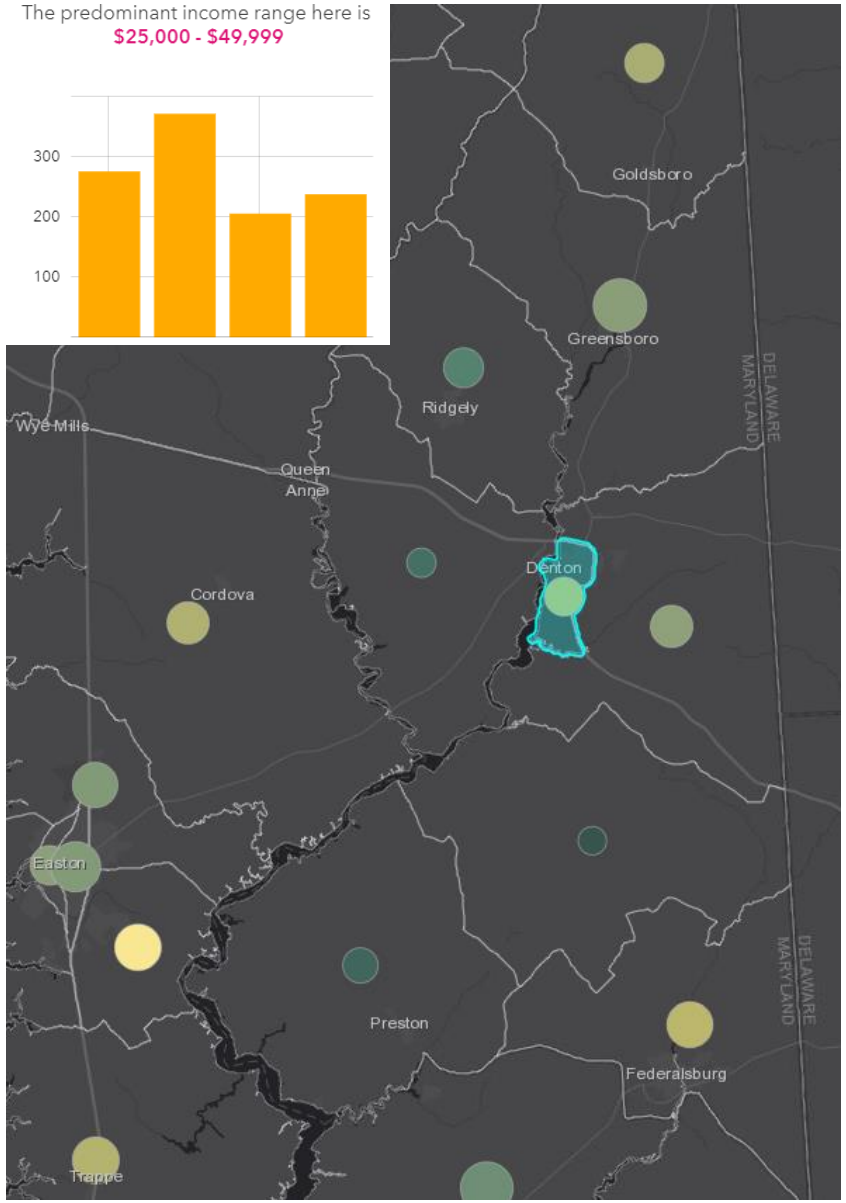
Establishments | Establishments by Sector



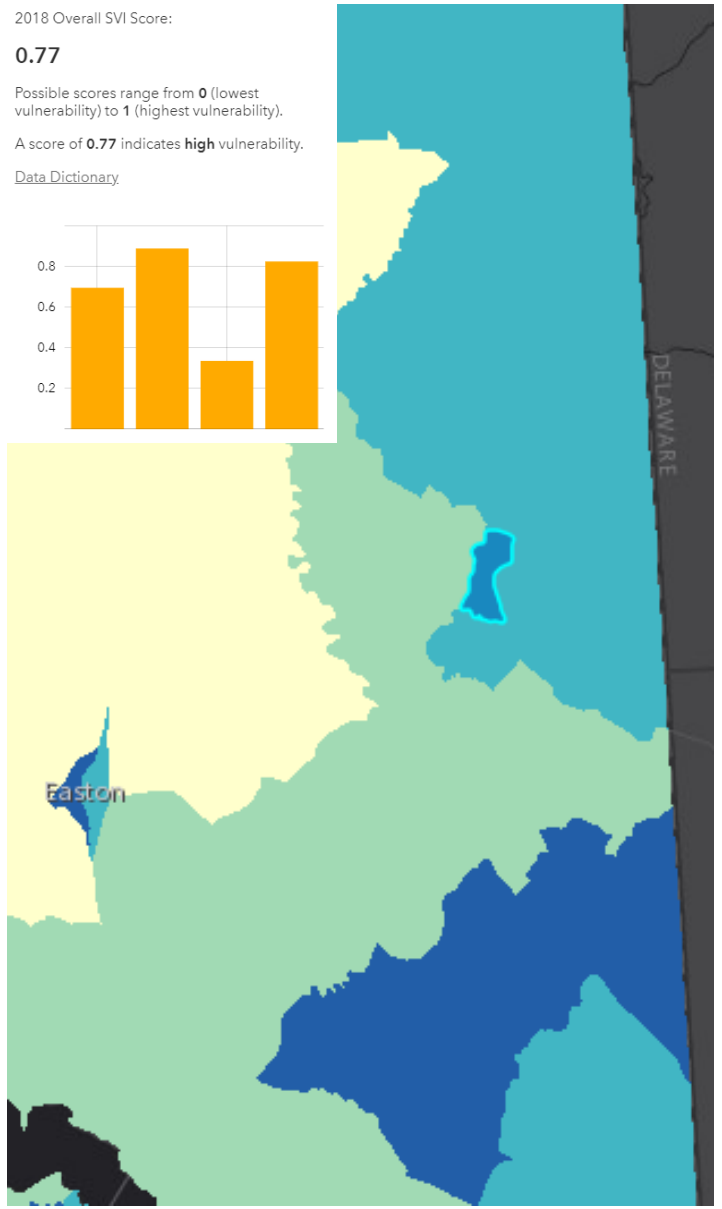
Employees | Employees by Sector



Predominant Income



Population Not in the Labor Force



Socially Vulnerable Populations

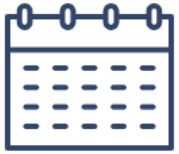
Maryland Tax Revenue Dashboards

A suite of dashboards developed to empower local leaders and decision makers with data about their local economy. Based on Maryland sales tax data, these dashboard highlight yearly, regional, and market trends. These powerful visualizations include a COVID-19 component and are one of the tools being used by local economic developers to answer questions about their region's economic health and the effectiveness of stimulus funding.

Quick View

Economic climate in a glance with scenario-driven KPIs.

Dashboard



Across Years

Find market trends with YOY comparison.

Dashboard

Across Boundaries

Use neighboring regions to gauge area performance.

Dashboard

Across Industries

Identify market opportunities, strains, and resiliencies.

Dashboard

Quick View

Economic climate in a glance with scenario-driven KPIs.

Dashboard

Maryland Estimated Revenue From Sales Tax Receipts, FY2021

Fiscal Year 2021 **Region** Caroline **Industry** All

Total Revenue

FYTD

$175M

-22,385,887 (-11.34%) YOY

% of Region's Revenue

FYTD

100.0%

0.00% YOY

Best Month April

FYTD

$35.1M

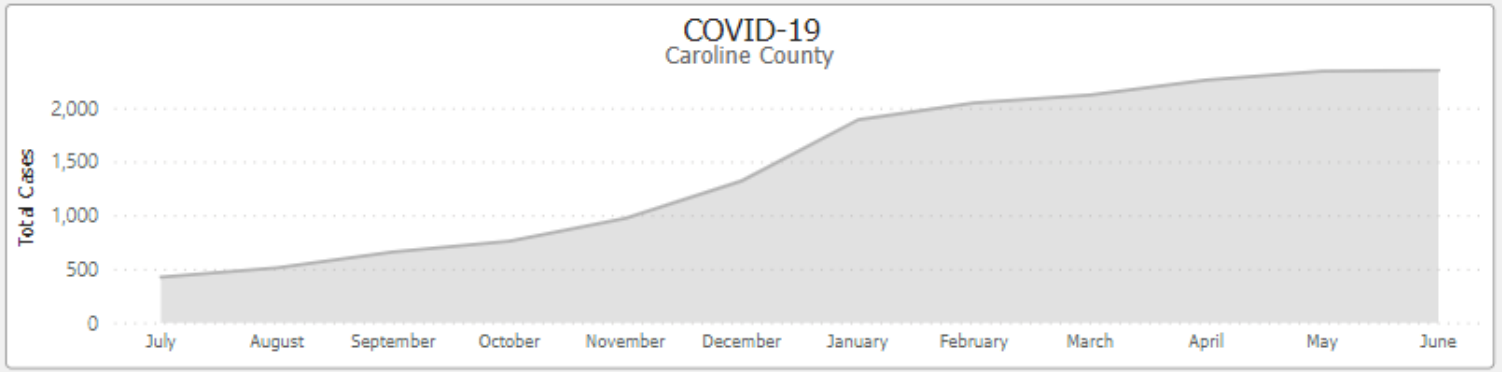
+20,659,667 (+142.89%) YOY

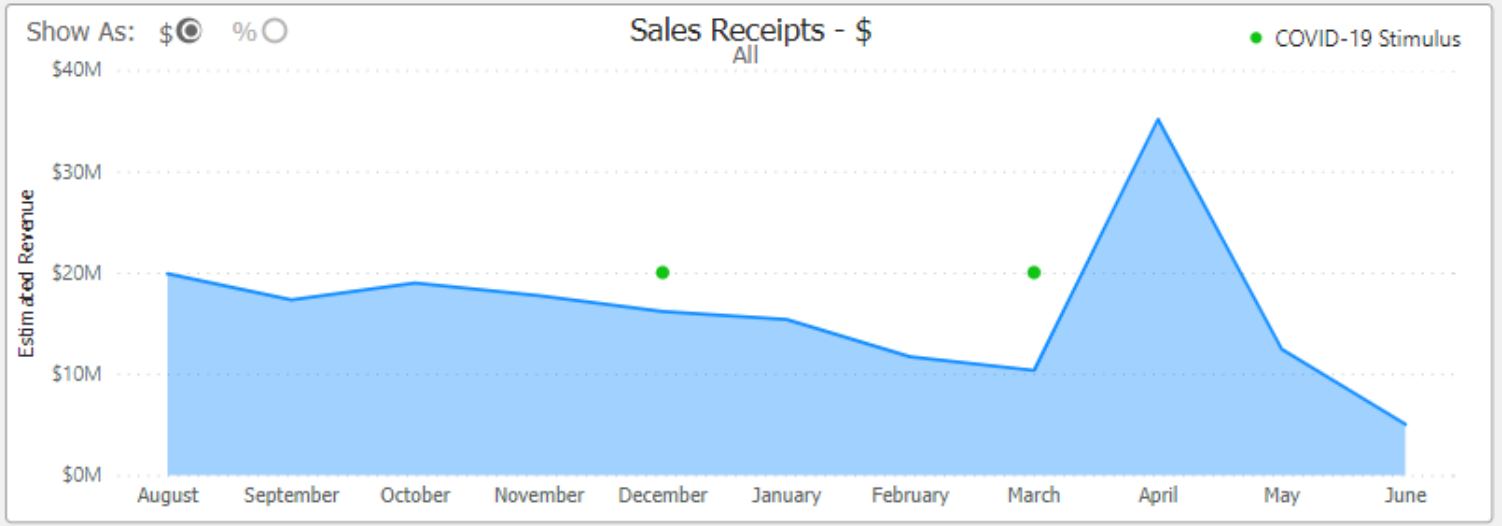
Worst Month March

FYTD

$10.3M

-3,745,523 (-26.60%) YOY





Across Years

Find market trends with YOY comparison.

Dashboard

Estimated Revenue From Maryland Sales Tax Receipts By Fiscal Year

Fiscal Year Multiple selections

- [x] 2021
- [x] 2020
- [x] 2019
- [ ] 2018
- [ ] 2017
- [ ] 2016

Region Caroline County

Industry All

Total Rever

$6

% of Region's Revenue

100.0%

FYTD

Best Month April

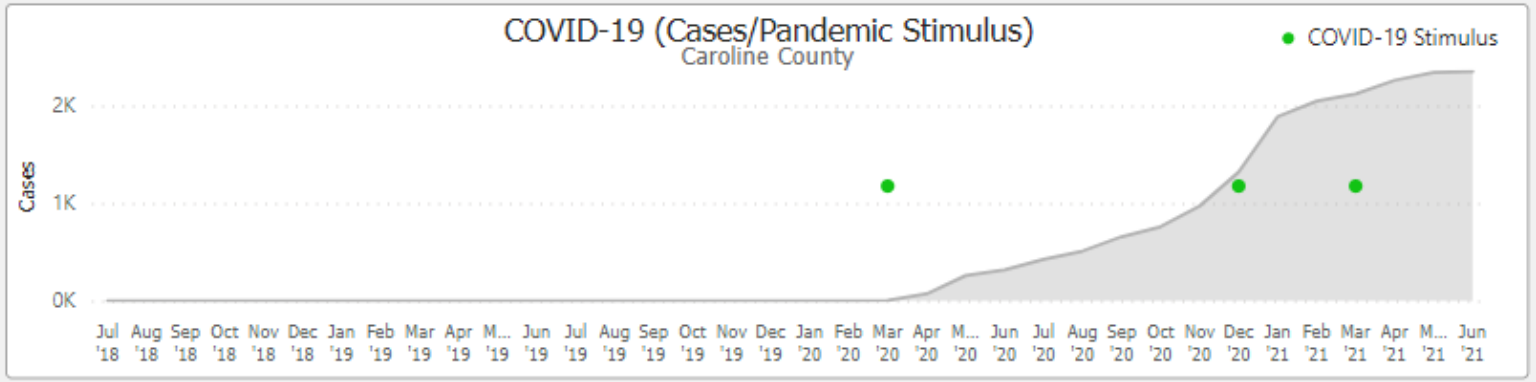
$69.4M

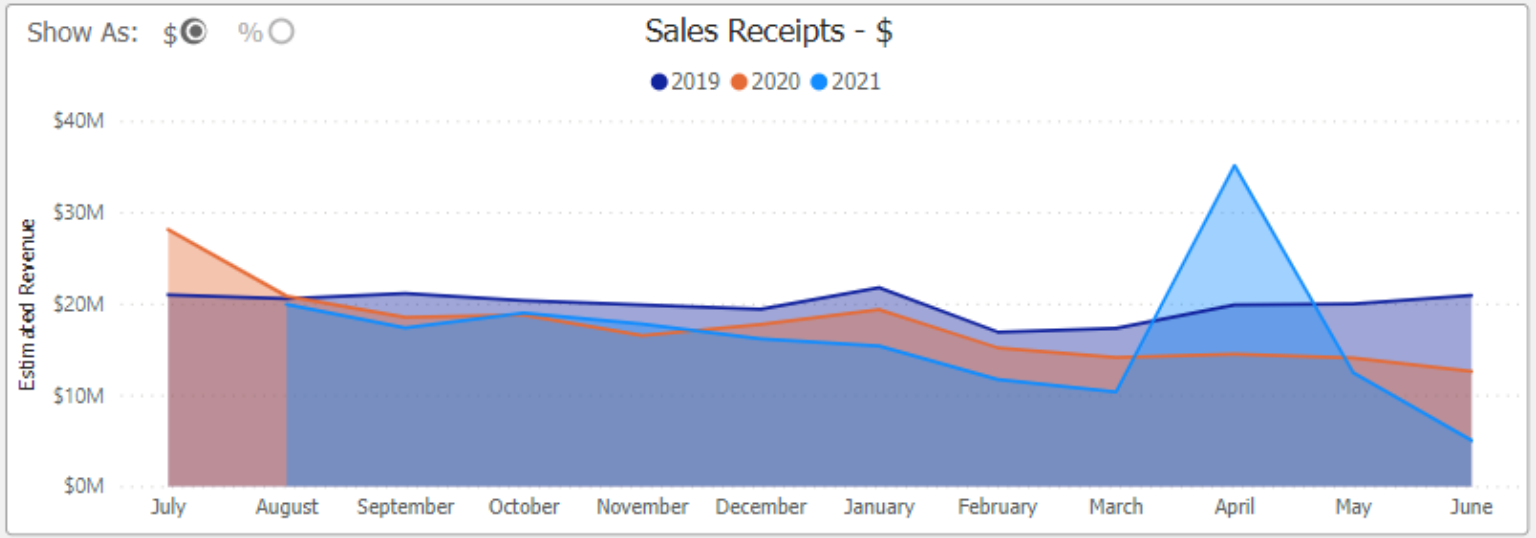
FYTD

Worst Month June

$33.4M

FYTD





Across Boundaries

Use neighboring regions to gauge area performance.

Dashboard

Estimated Revenue From Maryland Sales Tax Receipts By Region, FY 2021

Fiscal Year 2021

Region Multiple selections

- [x] Caroline
- [ ] Carroll
- [ ] Cecil
- [ ] Charles
- [x] Dorchester
- [ ] Frederick
- [ ] Garrett

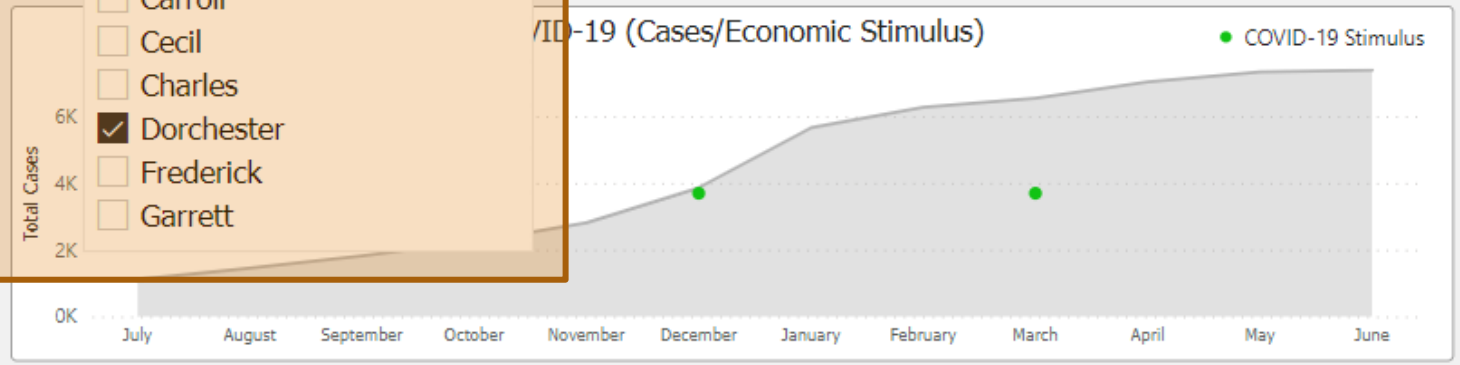
Industry All

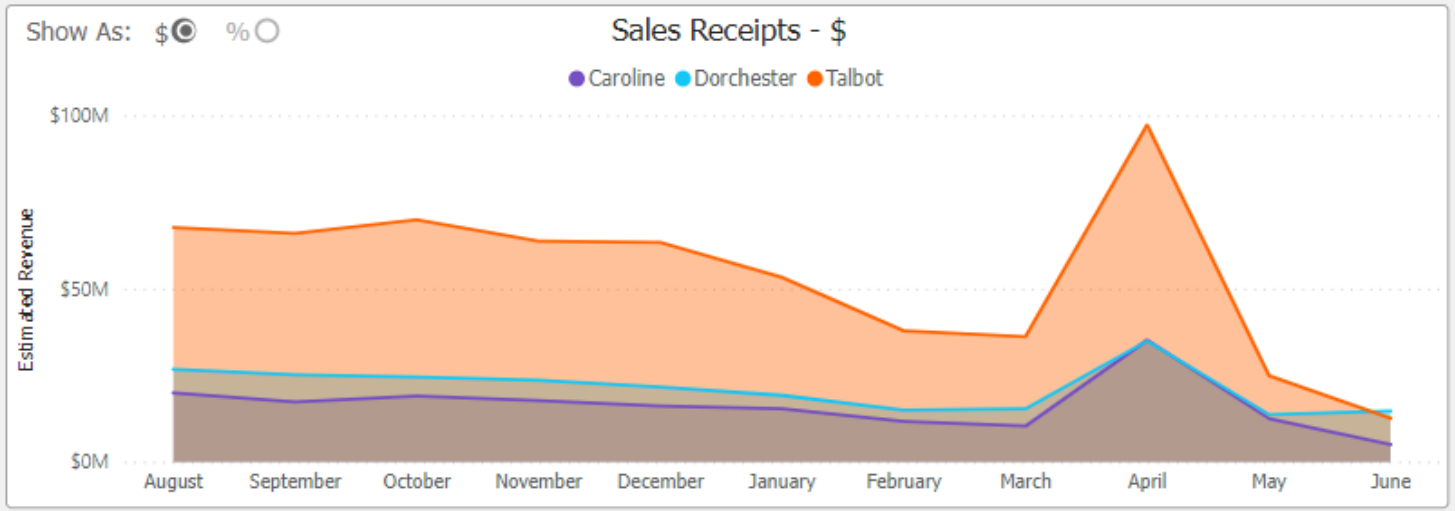
Total Revenue FYTD
$974.5M
($126,571,823.00) (-11.50%) YOY

% of Region's Revenue FYTD
100.0%
(0.00%) YOY

Best Month April FYTD
$167.3M
$97,430,915.17 (139.53%) YOY

Worst Month May FYTD
$51.0M
($19,359,328.67) (-28.37%) YOY





Across Industries

Identify market opportunities, strains, and resiliencies.

Dashboard

Estimated Revenue From Maryland Sales Tax Receipts By Industry, FY 2021

Fiscal Year 2021

Region Caroline

Industry Multiple selections

- [ ] Select all
- [x] Apparel
- [ ] Automotive
- [ ] Building and Contractors
- [x] Food and Beverage
- [ ] Furniture, Fixtures, and Appliance
- [x] General Merchandise

Total Revenue

FYTD

$112.0M

($14,278,343.17) (-11.30%) YOY

% of Region's Revenue

FYTD

64.0%

(-0.18%) YOY

Best Month: April

FYTD

$19.3M

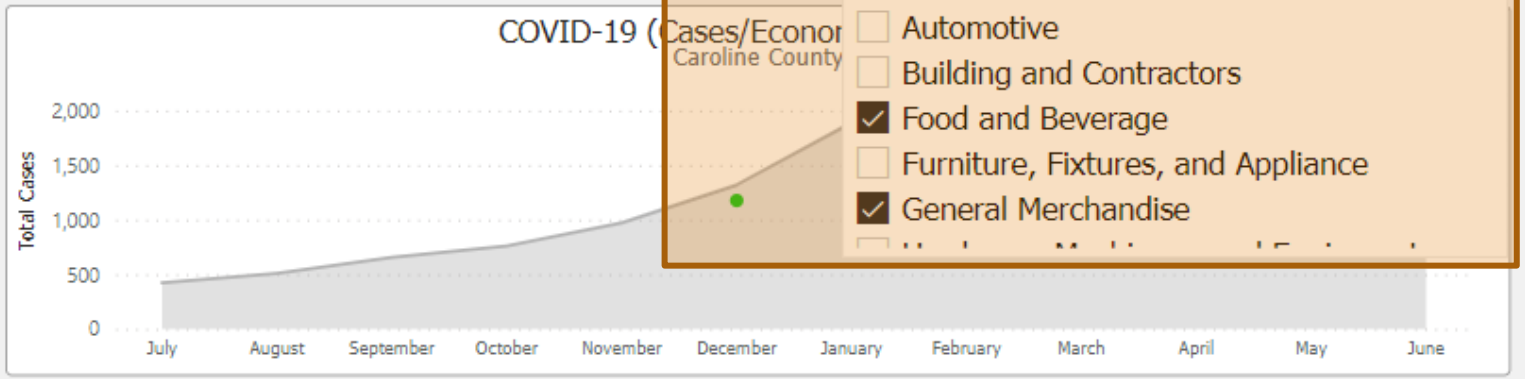
$8,836,764.00 (84.32%) YOY

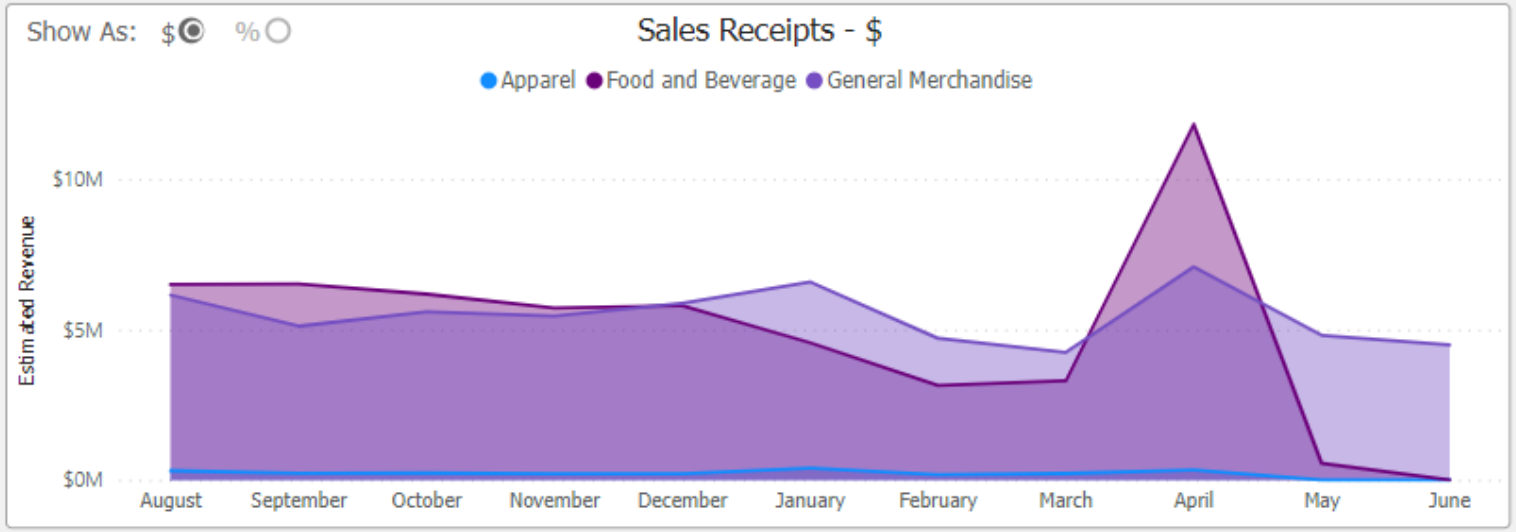
Worst Month: May

FYTD

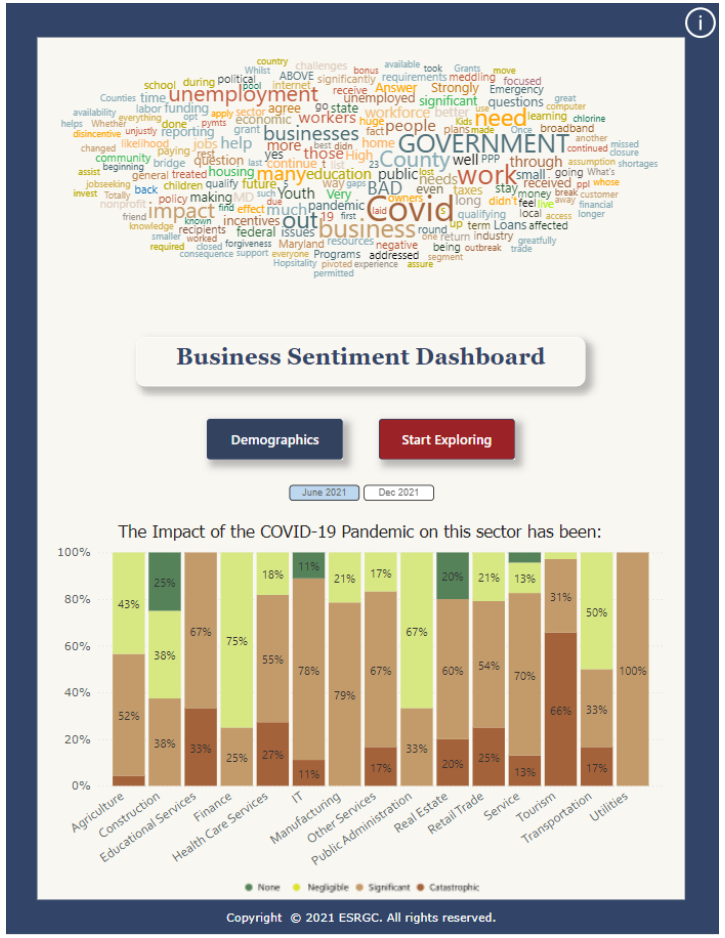
$5.4M

($3,541,760.83) (-42.42%) YOY





Business Sentiment Survey



- Goals of the survey
  - Track business sentiment locally and regionally
  - Identify vulnerable businesses
  - Identify challenges facing our region
  - Understand and address workforce issues
  - Assist in long-term planning and development of public policy
- Survey development: 50 question survey designed by BEACON based on committee goals and input.
- Administered by counties
  - Responses: June 2021 = 244; December 2021 = 388
- 3rd Survey is currently open until June 10!!

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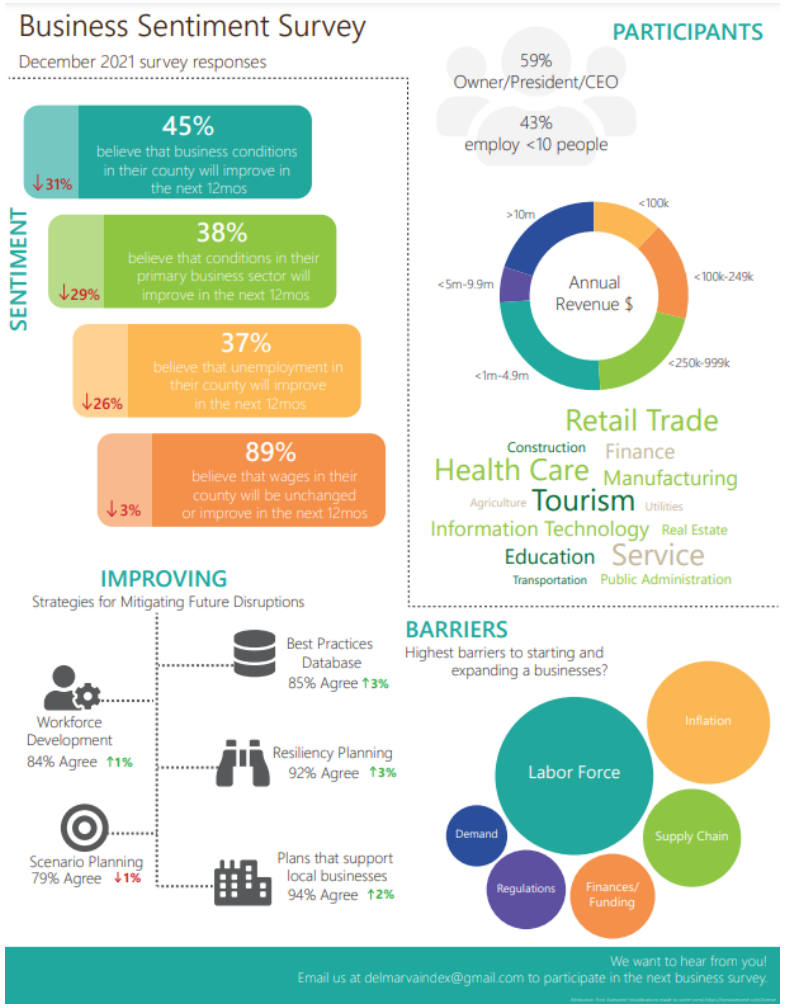
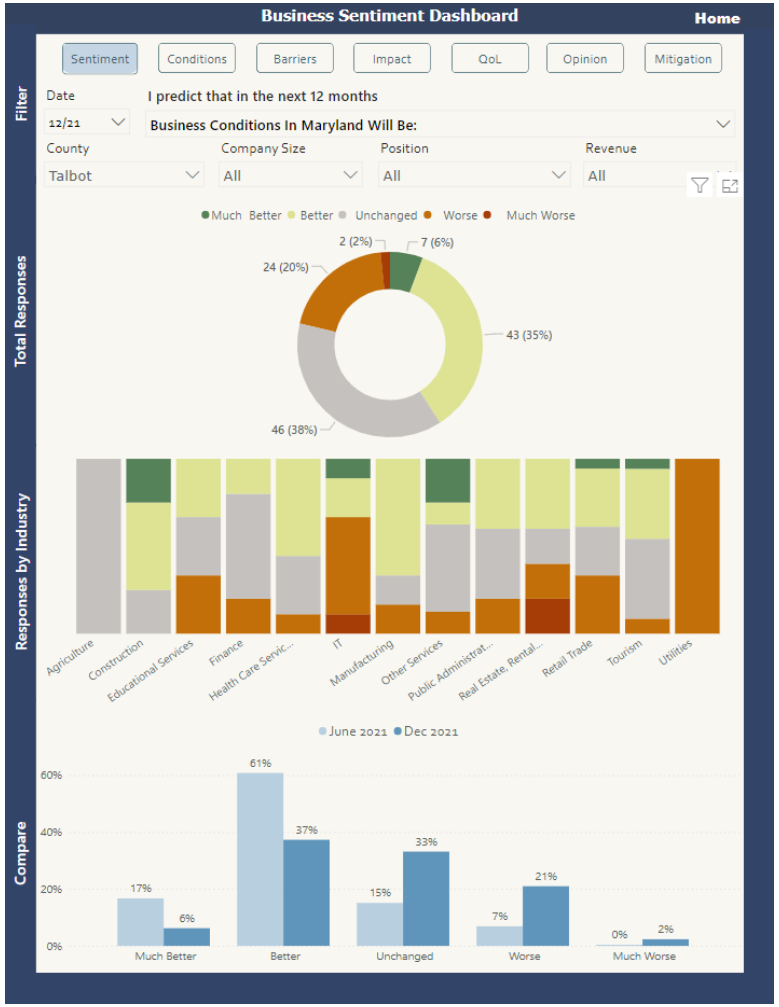


Infographic

Report



Dashboard

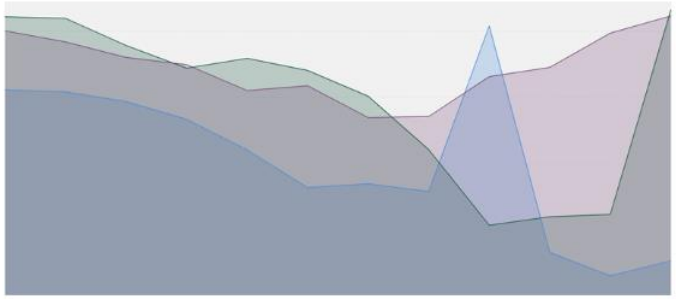
Let us know the conditions in your industry

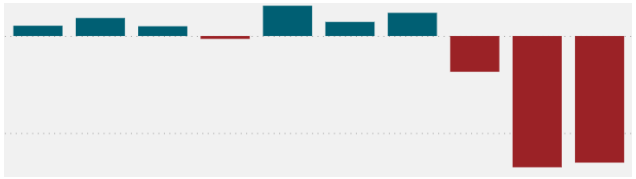
Please Participate in the Spring 2022 Eastern Shore Economic Resiliency Survey

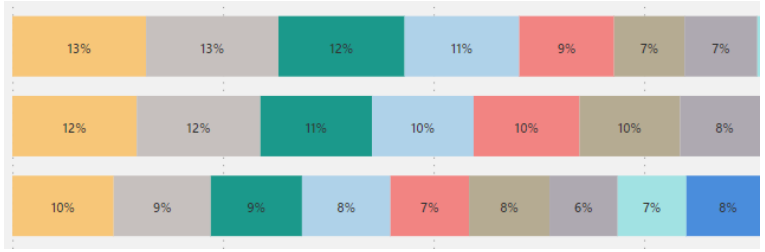
Survey closes 6/10/2022

Tourism Revenue Across Years

• 2021 • 2020 • 2019







Maryland Estimated Tourism Revenue Dashboard

Quick View | Across Years | Across Industries | Across Boundaries

Fiscal Year 2021 **Region** Maryland **Industry** All

Search

- Select all
- Airlines - Commercial
- Automobile, Bus and Truck Rentals
- General Merchandise
- Hotels, Motels Selling Food - W/BWL
- Hotels, Motels, Apartments, Cottages
- Recreation and Amusement Places

Tourism Revenue

FYTD

$4.90B

-31.30% YOY

% of Industry Revenue

FYTD

100.00%

0.00% YOY

Best Month March

FYTD

$815.76M

-5.46% YOY

Worst Month May

FYTD

$61.74M

-71.19% YOY

Tourism Reve

Airlines - Commercial | Automobile, Bus and ... | General Merchandise | Hotels, Motels

$0.3bn
$0.2bn
$0.1bn
$0.0bn

July August September October November December January February March April May June

Tourism Revenue by Industry, 2021

Delmarva Index

•Launched in 2019, a partnership between MSRC, TCCLES, and ESRGC with support from the RMC through the RMPIF

•An ongoing initiative to develop tools and resources custom built for the residents, businesses, and community organizations on the Delmarva Peninsula.

•Free and easy access to a curated repository of data, information, and tools relevant to the Eastern Shore.

Delmarva Index: Workforce Infographics

- Series of interactive infographics showcasing economic indicators as tools to interpret overall economic health of our communities
- Data is available at county, municipality, and commute areas.
- Data sources: ESRI, BLS, Census Bureau ACS
- Compare communities to each other as well as the state and nation.
- Commute areas offer comparative analysis for 10, 20, 40min commute distances from municipalities
- Many elements are interactive

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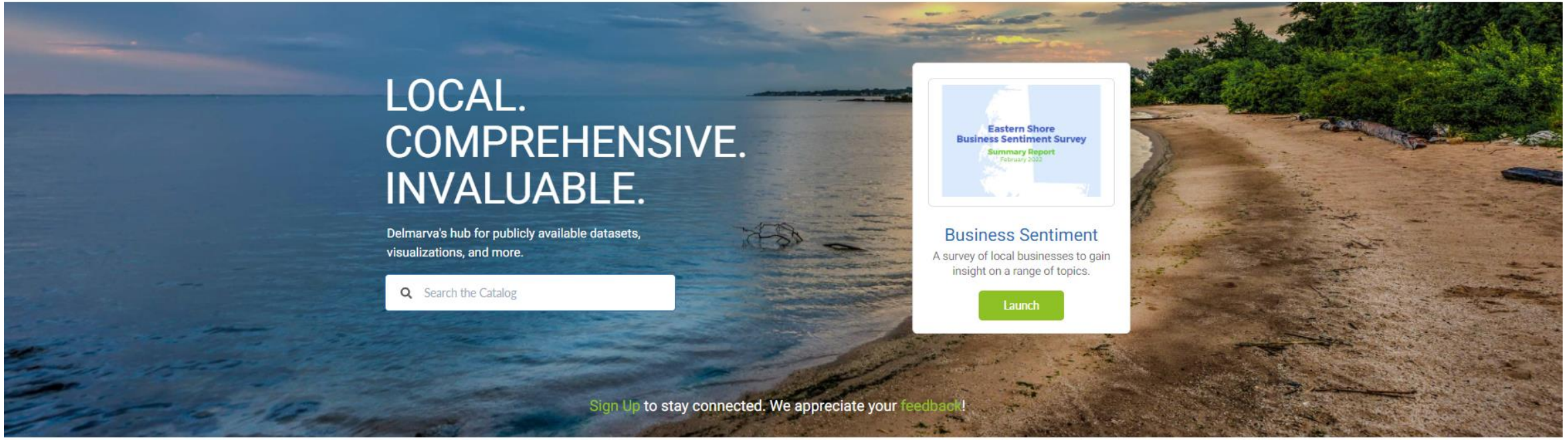
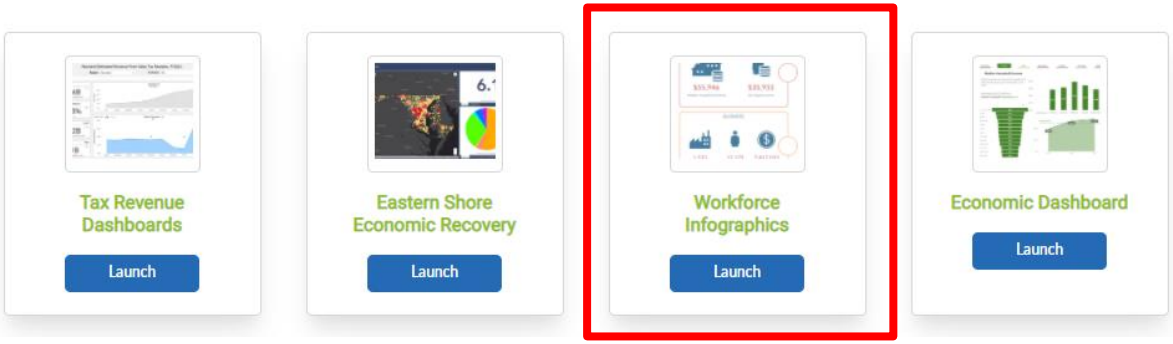


Popular Resources Helping Users



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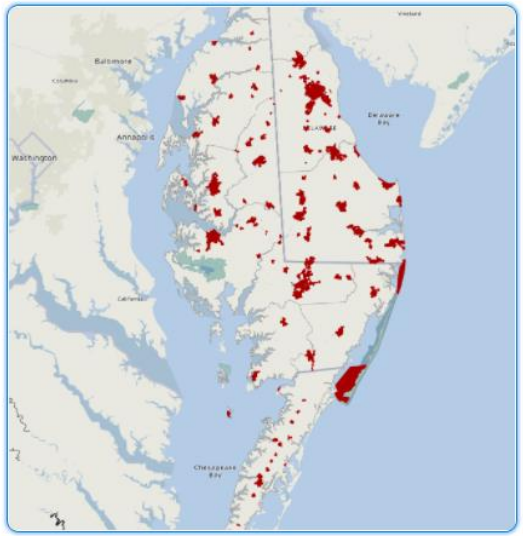
Delmarva Index
A Regional Resource

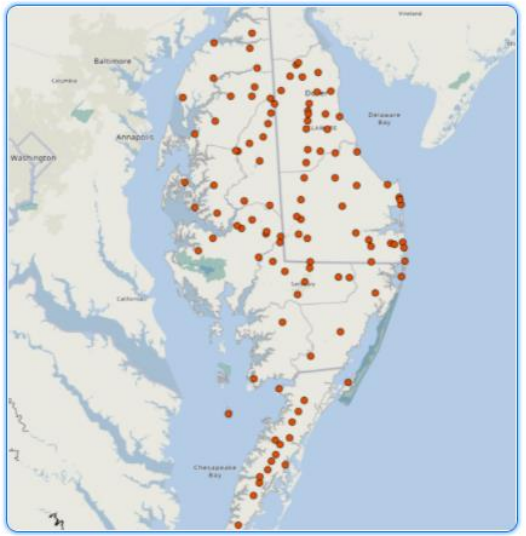
Delmarva Workforce Infographics

County

Municipality



Commute Areas



RMC Rural Maryland Council

RMPIF Rural Maryland Prosperity Investment Fund

MSRC Mid-Shore Regional Council

ESRGC

Tri-County Council for the Lower Eastern Shore of Maryland

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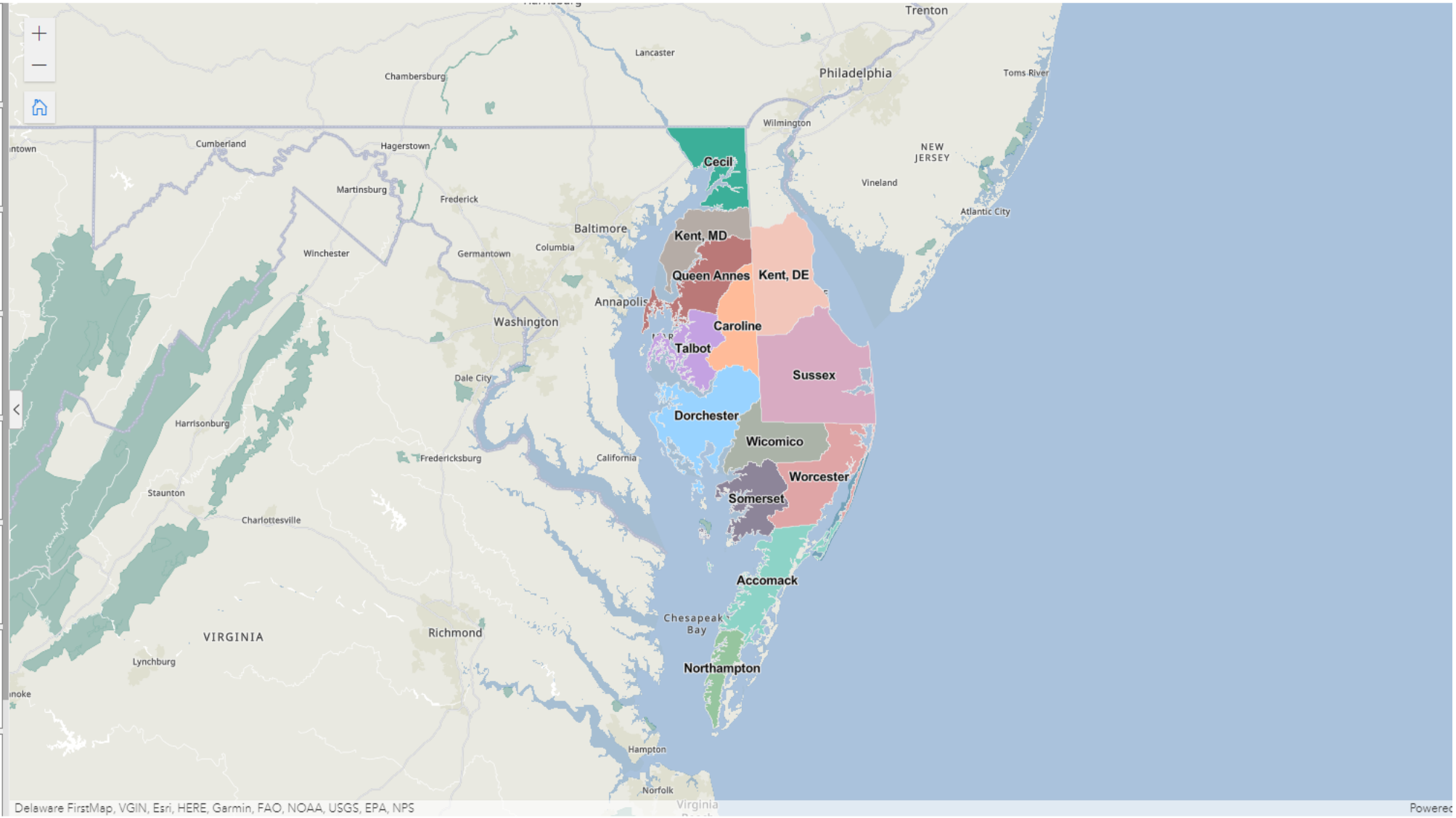
Delmarva Index
A Regional Resource

Kent, DE	Interactive	PDF
Sussex	Interactive	PDF
Caroline	Interactive	PDF
Cecil	Interactive	PDF
Dorchester	Interactive	PDF
Kent, MD	Interactive	PDF
Queen Annes	Interactive	PDF
Somerset	Interactive	PDF



RMC Rural Maryland Council
RMPIF Rural Maryland Prosperity Investment Fund
MSRC Mid-Shore Regional Council
ESRGC
Tri-County Council for the Lower Eastern Shore of Maryland

Workforce Overview

Caroline County

INCOME

$63,353
Median Household Income*

$31,189
Per Capita Income*

10.0%
One Year Weekly Wages Gain/Loss†

$918
Annual Average Weekly Pay†

$47,718
Average Annual Pay†

KEY FACTS

34,817
Population*

39.9
Median Age*

12,850
Households*

$50,920
Median Disposable Income*

BUSINESS

1,124
Total Businesses**

9,977
Total Employees**

4,170,837
Total Annual Sales ($000)**

HIGHEST EDUCATION ACHIEVED

19%
Bachelor's/Grad/Prof Degree*

25%
Some College*

40%
High School Diploma Only*

15%
No High School Diploma*

COMMUTERS

15%
Spend 7+ hours commuting to and from work per week*

83.7%
Drove Alone to Work¶

15,363
Workers Commute to Work Base¶

EMPLOYMENT

58%
White Collar*

29%
Blue Collar*

12%
Services*

4.3%
Projected Unemployment Rate*

65.0%
Labor Force Participation Rate¶

-6%
One-Year Employment Gain/Loss†

*ESRI 2021/2026 Esri Updated Forecasted Demographics
**ESRI 2021 US Business Locations & Summary data
†BLS 2020 Annual Average
¶Census Bureau, ACS 2019, Table S2301(LPR), S0801(Commute)
For more details about the data visit Delmarva Index

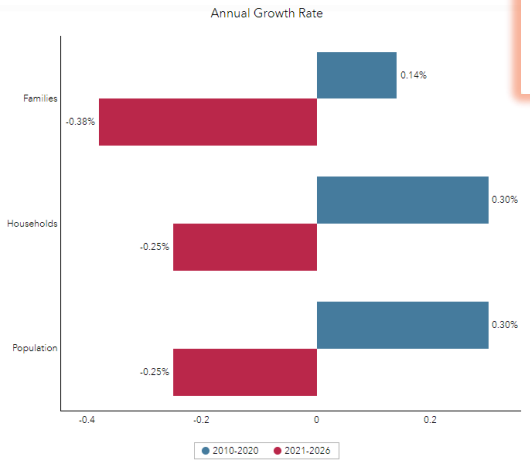
Note: Income, Business, and Commuter variables are based on the labor force population. Key Facts, Employment variables are based on total population and Education based on individuals 25+.

Households By Income

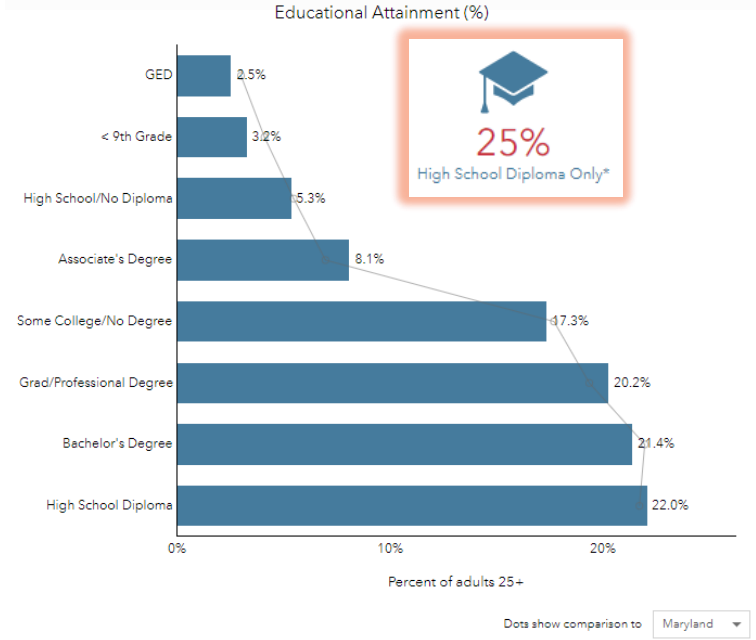
The largest group: $50,000 - $74,999 (17.9%)
The smallest group: $15,000 - $24,999 (6.3%)

Indicator ▲	Value	Diff
<$15,000	10.7%	+3.3%
$15,000 - $24,999	6.3%	+0.8%
$25,000 - $34,999	6.7%	+0.4%
$35,000 - $49,999	6.5%	-2.4%
$50,000 - $74,999	17.9%	+2.8%
$75,000 - $99,999	15%	+1.9%
$100,000 - $149,999	17.4%	-2%
$150,000 - $199,999	7.7%	-2.7%
$200,000+	11.8%	-2%

$77,414
Median Household Income*

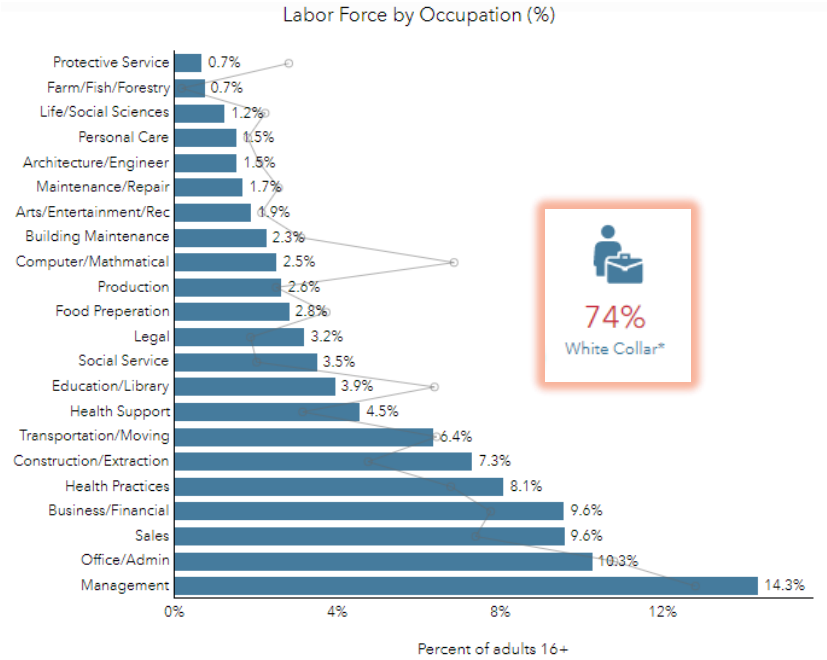


38,789
Population*



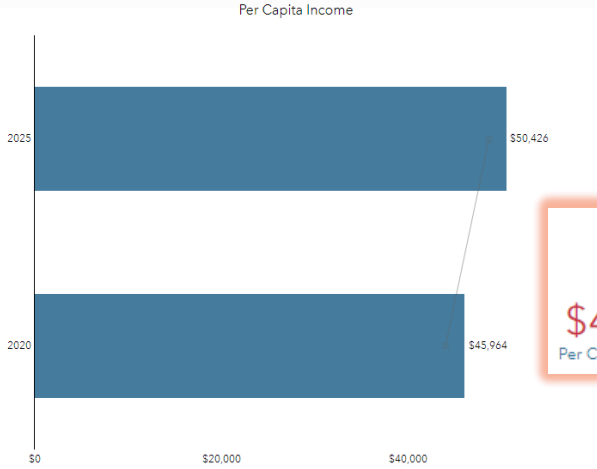
25%
High School Diploma Only*

Dots show comparison to Maryland



74%
White Collar*

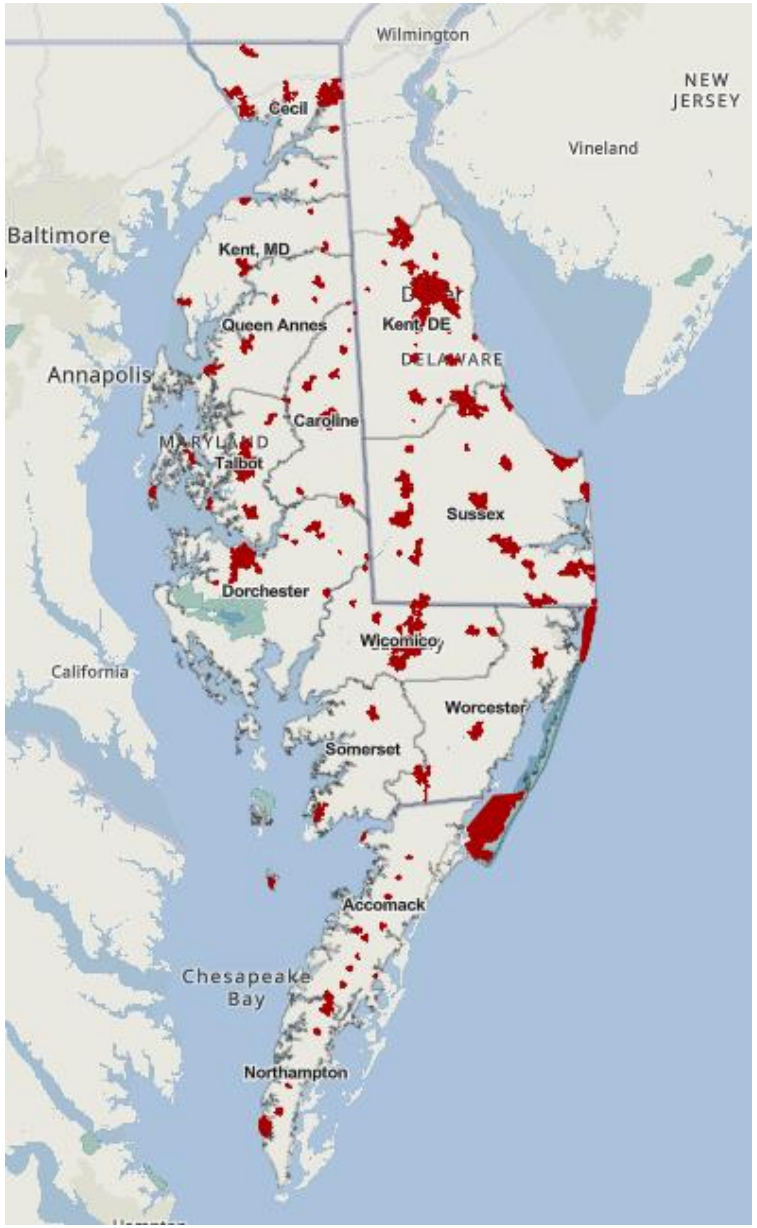
Dots show comparison to Maryland



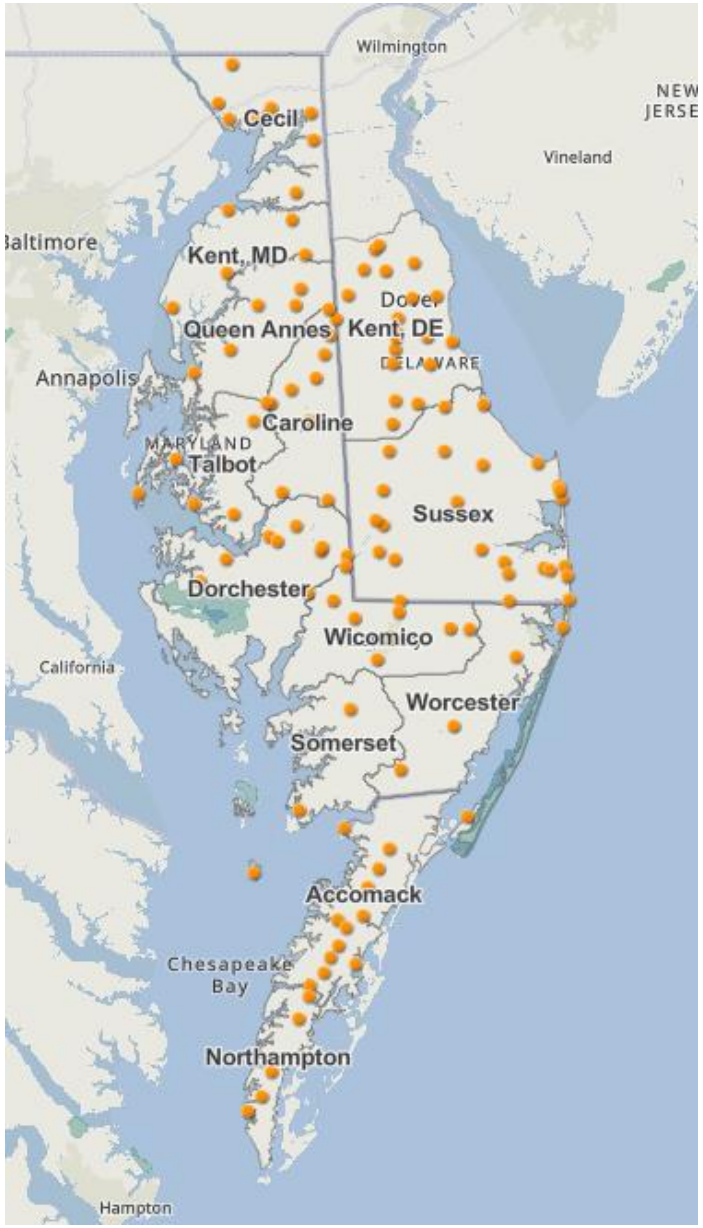
$45,964
Per Capita Income*

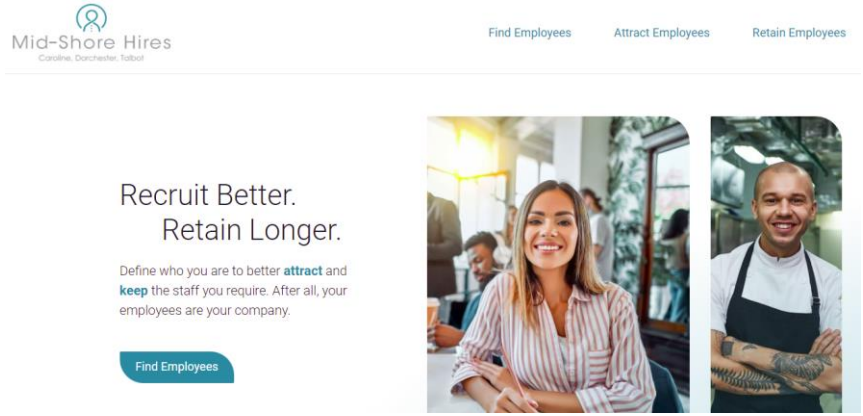
Dots show comparison to Maryland

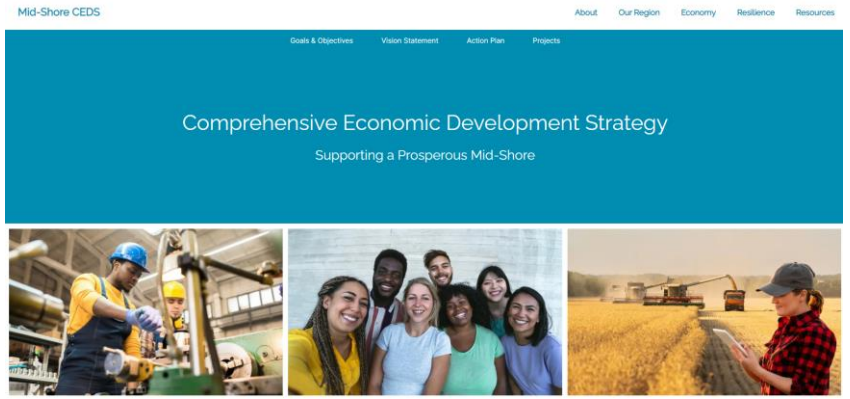
Municipalities

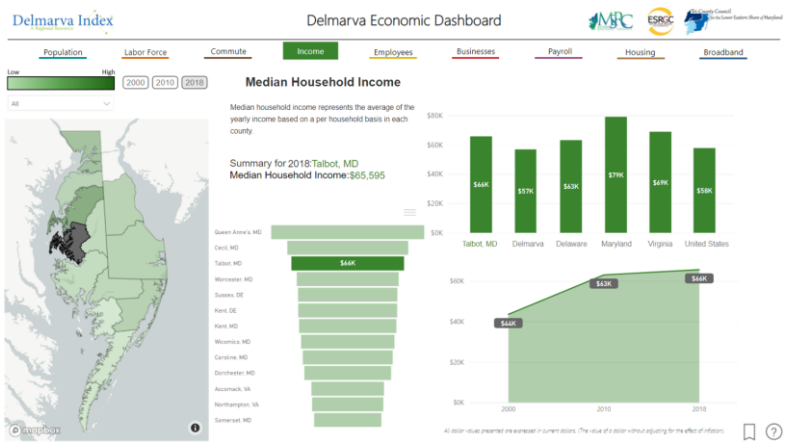


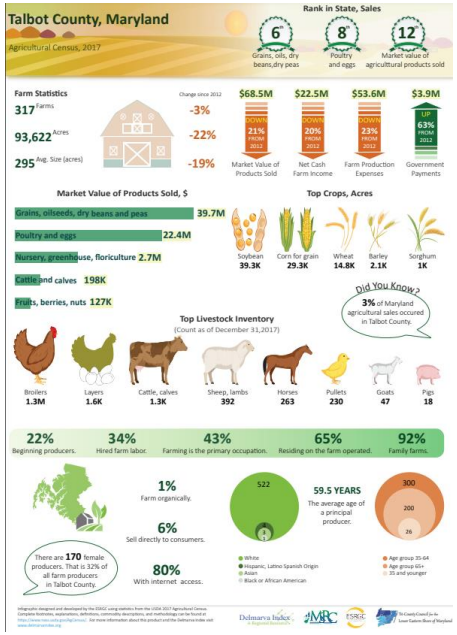
Commute Areas

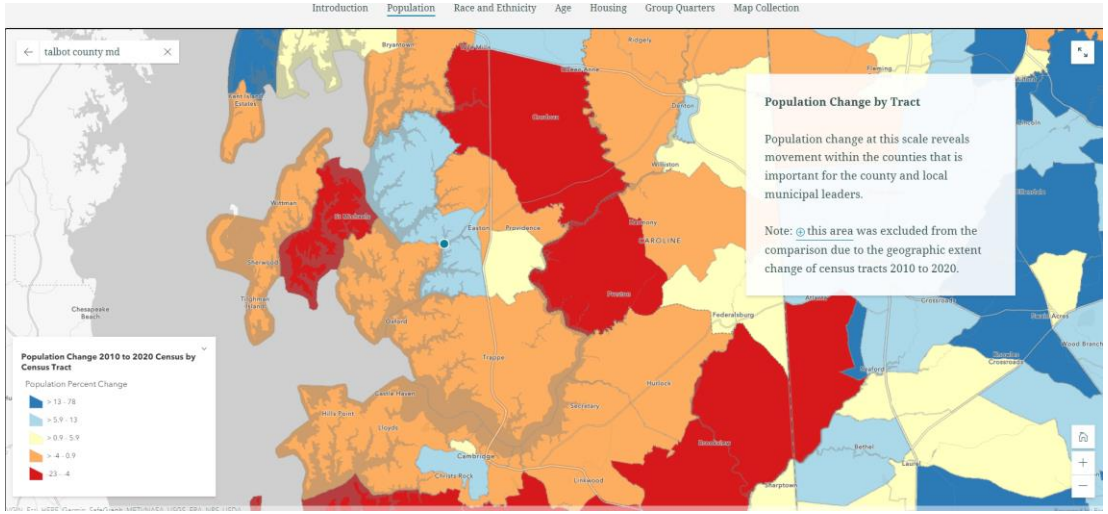












Tri-County Council for the Lower Eastern Shore of Maryland

MSRC MID-SHORE REGIONAL COUNCIL

Delmarva Index
A Regional Resource

RMC

ESRGC
EASTERN SHORE REGIONAL GIS COOPERATIVE

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Delmarva Index
A Regional Resource

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