



CHAPTER IV. LOCAL ECONOMY

A. ECONOMIC BASE

Economic activity is commonly categorized for analysis into business type and functions called sectors. Sector delineation varies, but this report data is based on the following sectors: farm; agricultural services; mining; construction; manufacturing; transportation, communications and utilities; wholesale trade; retail trade; finance, insurance and real estate (FIRE); services, federal civilian government; federal military; and state and local government. Through the use of location quotients based on employment figures it can be determined if a region has “specialization” in a sector. Specialization occurs when based on macro employment distribution, in this case national, the local jurisdiction employs more people than needed to meet local demands.

A local economy that employs a higher percent of one sector than the national percent generates activity that is used outside of the jurisdiction and thereby exports goods and imports payment for those goods. Employment that generates exports is often referred to as “base employment” that brings monetary assets into the community. However, employment that does not produce a level of goods and services sufficient to meet local demand creates a net import sector. A net import sector leaks monetary value to providers outside of the jurisdiction. Understanding the dynamics of base employment through location quotients provides guidance for targeted diversification of businesses to minimize leaking dollars to businesses outside the jurisdiction. Employment sectors with a location quotient of 1.00 meet local needs. A location quotient less than 1.00 is a net importer while quotients over 1.00 are net exporters.

1. Farm

Carroll County’s farming sector represents an area of specialization for Carroll County. This is common for rural counties that continue to have viable agricultural operations. **Exhibit 49** shows that the degree of specialization in farming increased from 1990 to 2000, and is expected to continue increasing as the national economic base moves from agriculture to other sectors. In contrast, Georgia is expected to continue a declining trend in agriculture share of employment. As a percent of employment, farm employment will continue to decline into the foreseeable future (**Exhibit 50**).

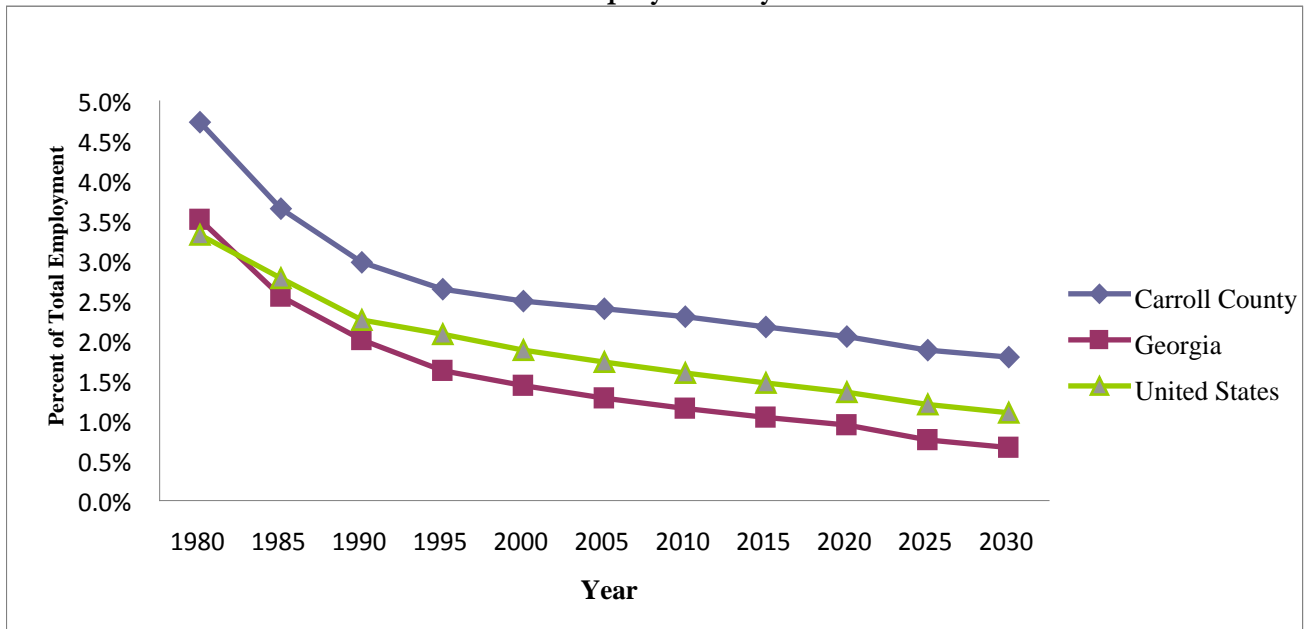
Exhibit 49: Farm Sector Location Quotients (1980-2020)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 1,240 | 26,180 | 1.425 | 96,559 | 2,747,311 | 1.057 | 3,798,000 | 114,231,182 |
| 1985 | 1,146 | 31,361 | 1.313 | 82,370 | 3,224,299 | 0.918 | 3,466,000 | 124,511,691 |
| 1990 | 1,060 | 35,550 | 1.319 | 74,286 | 3,690,605 | 0.890 | 3,153,000 | 139,426,897 |
| 1995 | 1,010 | 38,180 | 1.272 | 68,780 | 4,229,292 | 0.782 | 3,106,000 | 149,358,792 |
| 2000 | 1,030 | 41,240 | 1.326 | 69,546 | 4,840,483 | 0.763 | 3,131,696 | 166,323,450 |
| 2005 | 1,162 | 48,378 | 1.385 | 67,121 | 5,238,962 | 0.739 | 3,075,296 | 177,306,786 |
| 2010 | 1,264 | 54,914 | 1.441 | 64,740 | 5,625,704 | 0.720 | 3,003,267 | 187,986,707 |
| 2015 | 1,334 | 61,411 | 1.476 | 62,543 | 6,012,137 | 0.707 | 2,929,665 | 199,015,385 |
| 2020 | 1,416 | 68,974 | 1.513 | 60,511 | 6,389,771 | 0.698 | 2,854,502 | 210,360,566 |
| 2025 | 1,337 | 70,986 | 1.569 | 53,126 | 6,984,276 | 0.634 | 2,692,506 | 224,260,403 |
| 2030 | 1,367 | 76,157 | 1.635 | 49,386 | 7,447,829 | 0.604 | 2,597,286 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates.



Exhibit 50: Farm Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 51: Farm Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$15,026 | \$717,937 | \$1,256,531 | \$91,991,463 |
| 1995 | \$20,737 | \$910,341 | \$1,783,509 | \$126,914,210 |
| 2000 | \$24,179 | \$1,193,508 | \$1,649,623 | \$187,034,834 |
| 2005 | \$28,218 | \$1,392,855 | \$1,762,302 | \$199,810,399 |
| 2010 | \$31,738 | \$1,566,640 | \$1,848,444 | \$209,577,224 |
| 2015 | \$35,945 | \$1,774,315 | \$1,927,177 | \$218,504,044 |
| 2020 | \$40,152 | \$1,981,977 | \$2,000,898 | \$226,862,549 |
| 2025 | \$44,193 | \$2,204,396 | \$2,135,392 | \$267,290,006 |
| 2030 | \$48,241 | \$2,414,868 | \$2,232,508 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

2. Agricultural Services

Agricultural Support Services constitutes a small economic sector in terms of employment, but is vital to continued agricultural viability. Both the County and the State are projected to experience increased specialization in agriculture services, although both jurisdictions lag behind the nation (**Exhibit 52**). **Exhibit 53** indicates that as a percent of total employment the agricultural services sector has increased and is anticipated to increase into the future. However, agriculture service is a small employment sector and may comprise only 1% of Carroll County employment by 2030.

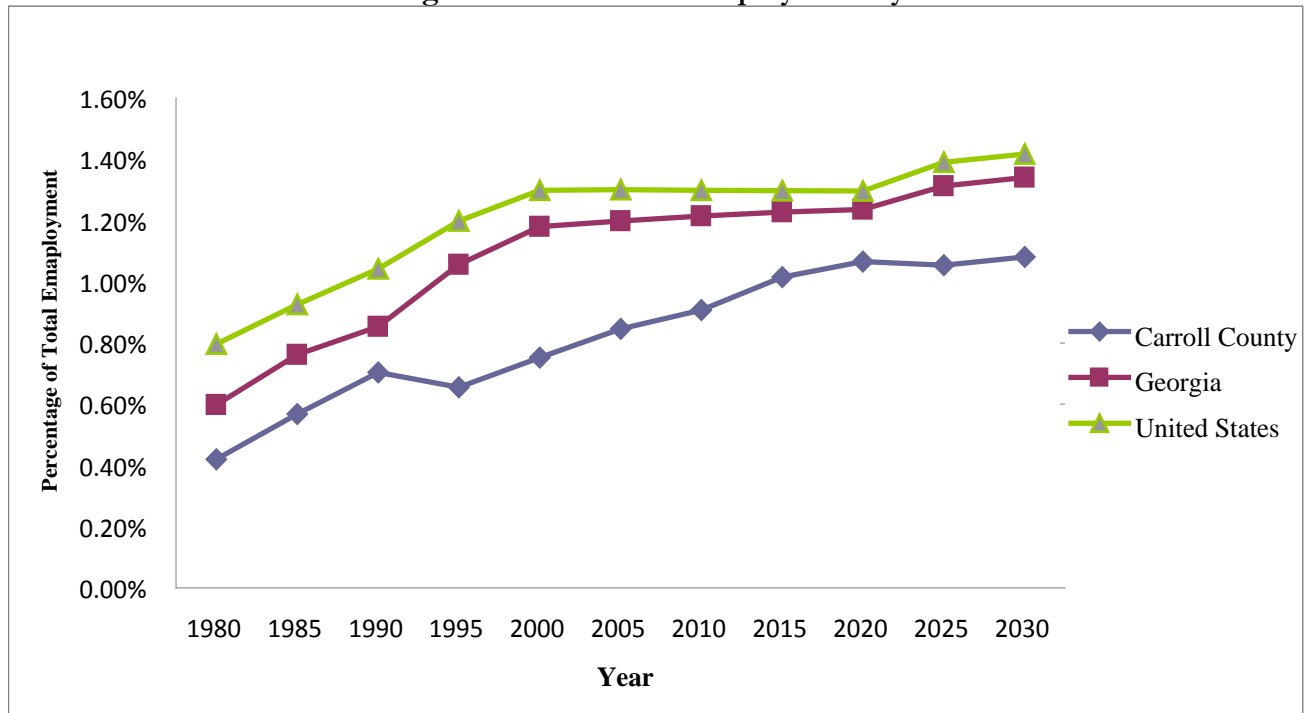


Exhibit 52: Agricultural Services Sector Location Quotients (1980-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 110 | 26,180 | 0.528 | 16,434 | 2,747,311 | 0.752 | 908,982 | 114,231,182 |
| 1985 | 178 | 31,361 | 0.613 | 24,573 | 3,224,299 | 0.823 | 1,152,316 | 124,511,691 |
| 1990 | 250 | 35,550 | 0.675 | 31,486 | 3,690,605 | 0.819 | 1,452,957 | 139,426,897 |
| 1995 | 250 | 38,180 | 0.547 | 44,651 | 4,229,292 | 0.881 | 1,789,107 | 149,358,792 |
| 2000 | 310 | 41,240 | 0.579 | 57,115 | 4,840,483 | 0.909 | 2,159,004 | 166,323,450 |
| 2005 | 409 | 48,378 | 0.650 | 62,770 | 5,238,962 | 0.922 | 2,305,172 | 177,306,786 |
| 2010 | 498 | 54,914 | 0.699 | 68,304 | 5,625,704 | 0.935 | 2,440,481 | 187,986,707 |
| 2015 | 623 | 61,411 | 0.782 | 73,749 | 6,012,137 | 0.946 | 2,580,785 | 199,015,385 |
| 2020 | 735 | 68,974 | 0.822 | 78,946 | 6,389,771 | 0.953 | 2,726,195 | 210,360,566 |
| 2025 | 748 | 70,986 | 0.758 | 91,670 | 6,984,276 | 0.944 | 3,116,559 | 224,260,403 |
| 2030 | 823 | 76,157 | 0.762 | 99,825 | 7,447,829 | 0.946 | 3,350,648 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc and Carroll Tomorrow. Update by PRISM Associates.

Exhibit 53: Agricultural Services Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc and Carroll Tomorrow. Update by PRISM Associates.



Exhibit 54: Agricultural Services Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$2,744 | \$717,937 | \$436,323 | \$91,991,463 |
| 1995 | * | \$910,341 | \$692,436 | \$126,914,210 |
| 2000 | * | \$1,193,508 | \$1,103,942 | \$187,034,834 |
| 2005 | | \$1,392,855 | \$1,179,348 | \$199,810,399 |
| 2010 | | \$1,566,640 | \$1,236,995 | \$209,577,224 |
| 2015 | | \$1,774,315 | \$1,289,684 | \$218,504,044 |
| 2020 | | \$1,981,977 | \$1,339,018 | \$226,862,549 |
| 2025 | | \$2,204,396 | \$1,616,197 | \$267,290,006 |
| 2030 | | \$2,414,868 | \$1,760,327 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Work, projections from 2020 through 2030 by PRISM Associates. * indicates years for which the BEA does not provide information to avoid disclosure of confidential information. Estimates are included in the total earnings. Due to the absence of this data, projections are not available.

3. Mining

Mining activities are highly mechanized and employ small numbers of people. Location quotients in **Exhibit 55** demonstrate that there is no regional specialization in mining activity for either Carroll County or Georgia. Mining is and will continue to be the smallest employment sector with less than 0.2% of the total employment in Carroll County (**Exhibit 56**).

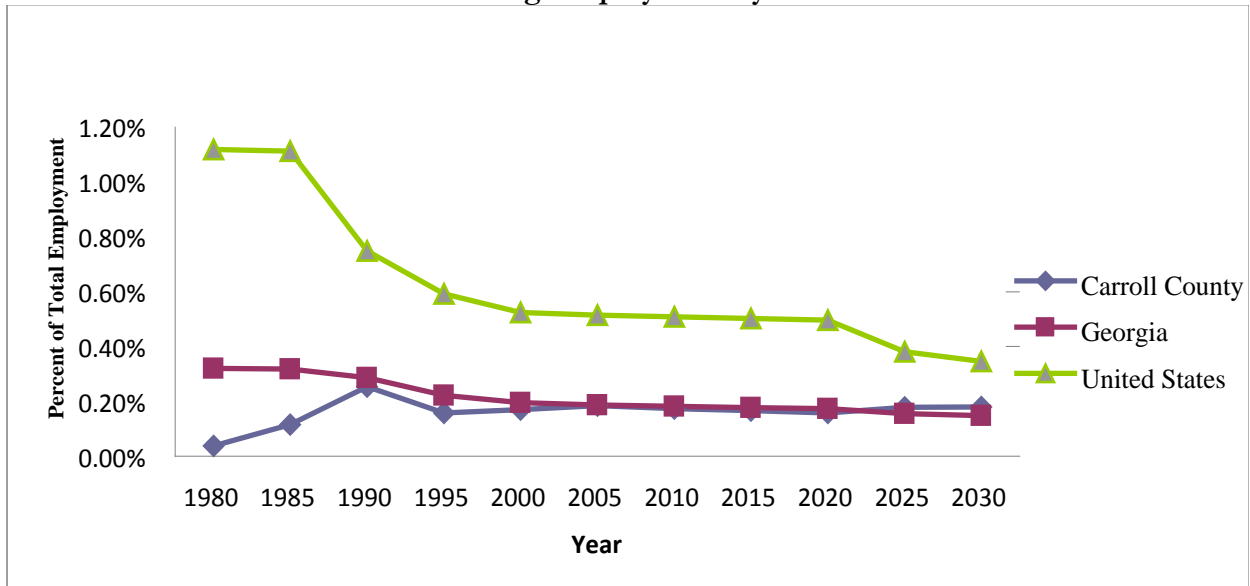
Exhibit 55: Mining Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 10 | 26,180 | 0.034 | 8,808 | 2,747,311 | 0.287 | 1,277,594 | 114,231,182 |
| 1985 | 36 | 31,361 | 0.103 | 10,239 | 3,224,299 | 0.285 | 1,385,001 | 124,511,691 |
| 1990 | 90 | 35,550 | 0.338 | 10,589 | 3,690,605 | 0.383 | 1,044,094 | 139,426,897 |
| 1995 | 60 | 38,180 | 0.266 | 9,412 | 4,229,292 | 0.376 | 883,863 | 149,358,792 |
| 2000 | 70 | 41,240 | 0.324 | 9,462 | 4,840,483 | 0.373 | 871,795 | 166,323,450 |
| 2005 | 89 | 48,378 | 0.357 | 9,794 | 5,238,962 | 0.363 | 913,230 | 177,306,786 |
| 2010 | 95 | 54,914 | 0.340 | 10,205 | 5,625,704 | 0.357 | 955,650 | 187,986,707 |
| 2015 | 102 | 61,411 | 0.331 | 10,638 | 6,012,137 | 0.353 | 998,956 | 199,015,385 |
| 2020 | 109 | 68,974 | 0.319 | 11,094 | 6,389,771 | 0.350 | 1,043,146 | 210,360,566 |
| 2025 | 126 | 70,986 | 0.467 | 10,856 | 6,984,276 | 0.408 | 854,527 | 224,260,403 |
| 2030 | 137 | 76,157 | 0.520 | 11,022 | 7,447,829 | 0.428 | 817,136 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 56: Mining Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 57: Mining Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$1,013 | \$717,937 | \$342,417 | \$91,991,463 |
| 1995 | * | \$910,341 | \$376,105 | \$126,914,210 |
| 2000 | * | \$1,193,508 | \$481,249 | \$187,034,834 |
| 2005 | | \$1,392,855 | \$514,121 | \$199,810,399 |
| 2010 | | \$1,566,640 | \$539,252 | \$209,577,224 |
| 2015 | | \$1,774,315 | \$562,221 | \$218,504,044 |
| 2020 | | \$1,981,977 | \$583,727 | \$226,862,549 |
| 2025 | | \$2,204,396 | \$650,465 | \$267,290,006 |
| 2030 | | \$2,414,868 | \$691,685 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates. * indicates years for which the BEA does not provide information to avoid disclosure of confidential information. Estimates are included in the total earnings. Due to the absence of this data, projections are not available.

4. Construction

Georgia and Carroll County have slight specialization in the construction industry demonstrated by the location quotients in **Exhibit 58**. Carroll County shows stronger specialization than Georgia. This reflects the burgeoning construction in metropolitan Atlanta. Construction employment as a percent of total employment is projected to decrease while total employment in this sector is projected to increase (**Exhibit 59**).

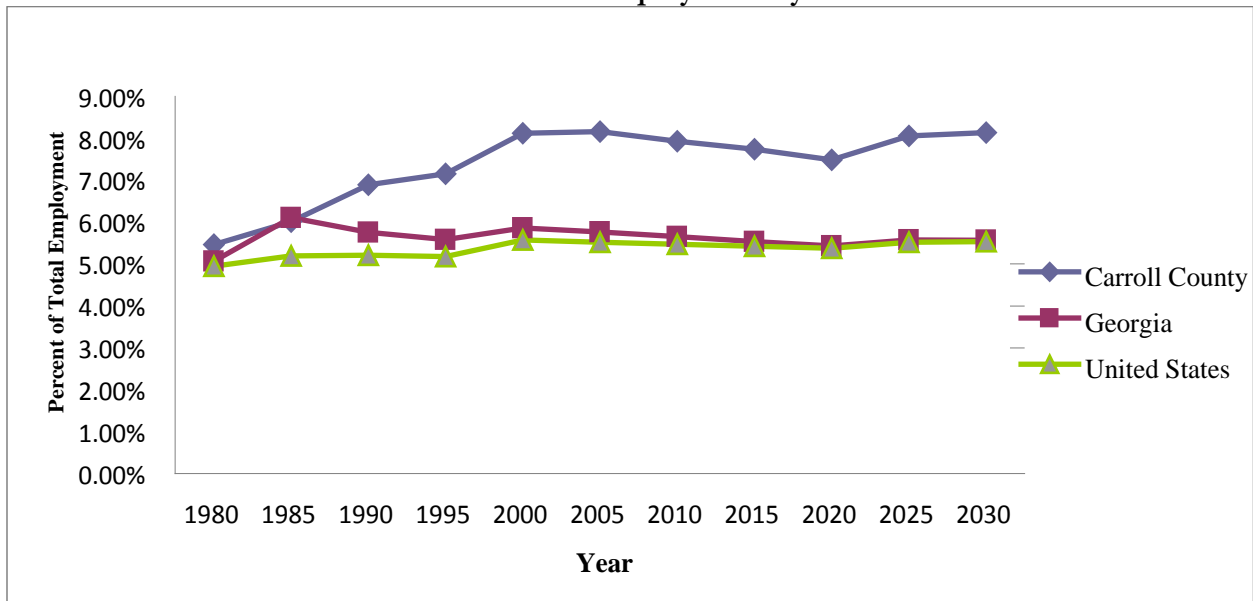


Exhibit 58: Construction Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 1,430 | 26,180 | 1.104 | 139,233 | 2,747,311 | 1.024 | 5,654,198 | 114,231,182 |
| 1985 | 1,885 | 31,361 | 1.158 | 196,914 | 3,224,299 | 1.176 | 6,465,524 | 124,511,691 |
| 1990 | 2,450 | 35,550 | 1.323 | 212,342 | 3,690,605 | 1.105 | 7,260,787 | 139,426,897 |
| 1995 | 2,730 | 38,180 | 1.381 | 236,158 | 4,229,292 | 1.079 | 7,731,499 | 149,358,792 |
| 2000 | 3,350 | 41,240 | 1.458 | 283,499 | 4,840,483 | 1.051 | 9,267,868 | 166,323,450 |
| 2005 | 3,949 | 48,378 | 1.478 | 301,977 | 5,238,962 | 1.044 | 9,791,426 | 177,306,786 |
| 2010 | 4,353 | 54,914 | 1.449 | 317,994 | 5,625,704 | 1.033 | 10,284,436 | 187,986,707 |
| 2015 | 4,752 | 61,411 | 1.427 | 332,881 | 6,012,137 | 1.021 | 10,790,084 | 199,015,385 |
| 2020 | 5,161 | 68,974 | 1.392 | 347,199 | 6,389,771 | 1.011 | 11,307,827 | 210,360,566 |
| 2025 | 5,719 | 70,986 | 1.461 | 389,540 | 6,984,276 | 1.011 | 12,369,468 | 224,260,403 |
| 2030 | 6,195 | 76,157 | 1.469 | 414,822 | 7,447,829 | 1.006 | 13,097,725 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 59: Construction Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 60: Construction Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$57,621 | \$717,937 | \$5,338,373 | \$91,991,463 |
| 1995 | \$70,991 | \$910,341 | \$6,690,996 | \$126,914,210 |
| 2000 | \$109,141 | \$1,193,508 | \$10,917,046 | \$187,034,834 |
| 2005 | \$28,218 | \$1,392,855 | \$11,662,744 | \$199,810,399 |
| 2010 | \$127,370 | \$1,566,640 | \$12,232,824 | \$209,577,224 |
| 2015 | \$143,262 | \$1,774,315 | \$12,753,874 | \$218,504,044 |
| 2020 | \$181,243 | \$1,981,977 | \$13,241,752 | \$226,862,549 |
| 2025 | \$178,783 | \$2,204,396 | \$15,712,754 | \$267,290,006 |
| 2030 | \$197,842 | \$2,414,868 | \$17,039,600 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates

5. Manufacturing

Carroll County is projected to continue its significant specialization in manufacturing activities, although the degree of specialization is expected to moderate over time (**Exhibit 61**). Within the nation, Georgia is slightly specialized in manufacturing. In the “Carroll County Profile of Target Business Clusters”, *Market Street Services, Inc.* notes that the highest specialization is in the metal industry. **Exhibit 62** shows that in Carroll County, the percent of employment in manufacturing far exceeded that of the State and nation. While manufacturing employment is projected to remain relatively consistent, it will decrease as a percentage of all employment.

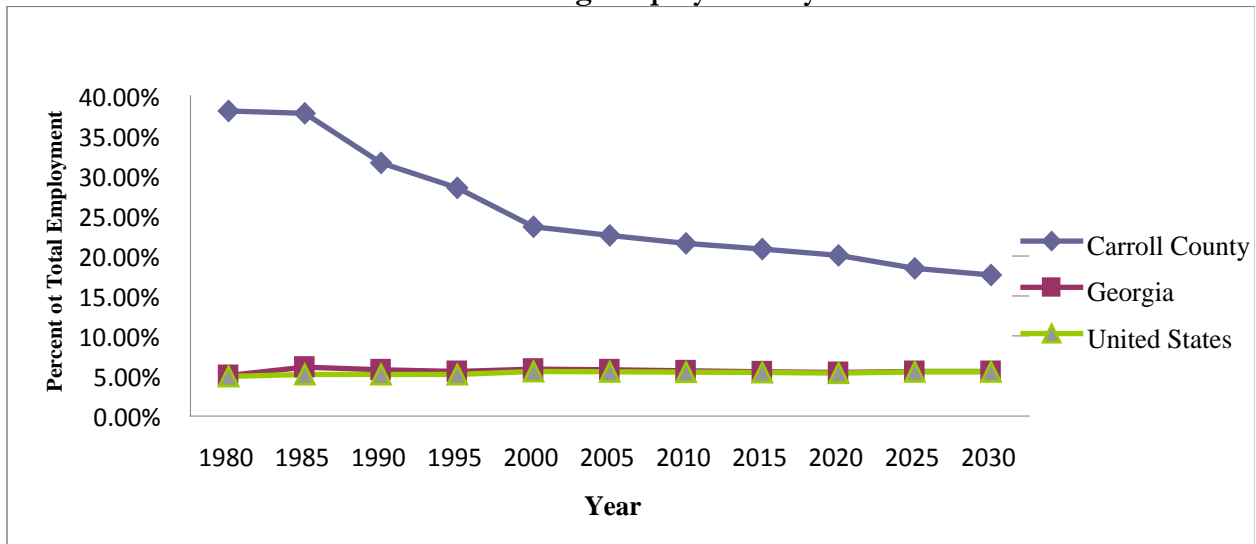
Exhibit 61: Manufacturing Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 9,970 | 26,180 | 7.694 | 139,233 | 2,747,311 | 1.024 | 5,654,198 | 114,231,182 |
| 1985 | 11,858 | 31,361 | 7.282 | 196,914 | 3,224,299 | 1.176 | 6,465,524 | 124,511,691 |
| 1990 | 11,230 | 35,550 | 6.066 | 212,342 | 3,690,605 | 1.105 | 7,260,787 | 139,426,897 |
| 1995 | 10,880 | 38,180 | 5.505 | 236,158 | 4,229,292 | 1.079 | 7,731,499 | 149,358,792 |
| 2000 | 9,750 | 41,240 | 4.243 | 283,499 | 4,840,483 | 1.051 | 9,267,868 | 166,323,450 |
| 2005 | 10,908 | 48,378 | 4.083 | 301,977 | 5,238,962 | 1.044 | 9,791,426 | 177,306,786 |
| 2010 | 11,838 | 54,914 | 3.940 | 317,994 | 5,625,704 | 1.033 | 10,284,436 | 187,986,707 |
| 2015 | 12,795 | 61,411 | 3.843 | 332,881 | 6,012,137 | 1.021 | 10,790,084 | 199,015,385 |
| 2020 | 13,836 | 68,974 | 3.732 | 347,199 | 6,389,771 | 1.011 | 11,307,827 | 210,360,566 |
| 2025 | 13,078 | 70,986 | 3.340 | 389,540 | 6,984,276 | 1.011 | 12,369,468 | 224,260,403 |
| 2030 | 13,404 | 76,157 | 3.178 | 414,822 | 7,447,829 | 1.006 | 13,097,725 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 62: Manufacturing Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 63: Manufacturing Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$274,071 | \$717,937 | \$16,240,724 | \$91,991,463 |
| 1995 | \$326,558 | \$910,341 | \$21,665,880 | \$126,914,210 |
| 2000 | \$349,215 | \$1,193,508 | \$27,638,545 | \$187,034,834 |
| 2005 | \$407,543 | \$1,392,855 | \$29,526,418 | \$199,810,399 |
| 2010 | \$458,392 | \$1,566,640 | \$30,969,683 | \$209,577,224 |
| 2015 | \$519,157 | \$1,774,315 | \$32,288,819 | \$218,504,044 |
| 2020 | \$579,917 | \$1,981,977 | \$33,523,973 | \$226,862,549 |
| 2025 | \$618,109 | \$2,204,396 | \$38,325,829 | \$267,290,006 |
| 2030 | \$668,535 | \$2,414,868 | \$41,055,357 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

6. Transportation, Communications & Utilities

Within the nation, Georgia has a degree of specialization in the transportation, communications and utilities industries (**Exhibit 64**). Carroll County does not exhibit specialization in these industries (**Exhibit 65**).

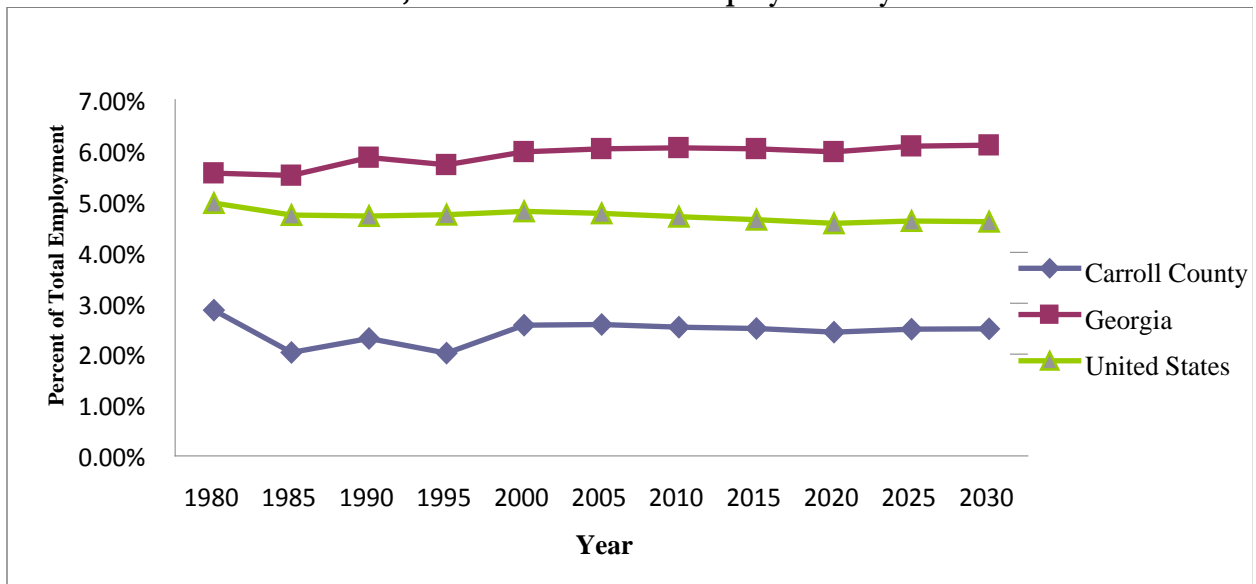


Exhibit 64: Trans., Comm. & Utilities Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 750 | 26,180 | 0.577 | 152,581 | 2,747,311 | 1.118 | 5,672,108 | 114,231,182 |
| 1985 | 638 | 31,361 | 0.430 | 177,746 | 3,224,299 | 1.164 | 5,894,887 | 124,511,691 |
| 1990 | 820 | 35,550 | 0.490 | 216,342 | 3,690,605 | 1.244 | 6,568,611 | 139,426,897 |
| 1995 | 770 | 38,180 | 0.426 | 241,887 | 4,229,292 | 1.207 | 7,076,213 | 149,358,792 |
| 2000 | 1060 | 41,240 | 0.535 | 289,253 | 4,840,483 | 1.243 | 7,994,497 | 166,323,450 |
| 2005 | 1250 | 48,378 | 0.542 | 316,153 | 5,238,962 | 1.267 | 8,445,760 | 177,306,786 |
| 2010 | 1388 | 54,914 | 0.538 | 340,455 | 5,625,704 | 1.287 | 8,839,047 | 187,986,707 |
| 2015 | 1537 | 61,411 | 0.540 | 362,618 | 6,012,137 | 1.300 | 9,229,926 | 199,015,385 |
| 2020 | 1675 | 68,974 | 0.531 | 381,543 | 6,389,771 | 1.306 | 9,616,329 | 210,360,566 |
| 2025 | 1766 | 70,986 | 0.539 | 424,811 | 6,984,276 | 1.319 | 10,345,188 | 224,260,403 |
| 2030 | 1900 | 76,157 | 0.543 | 454,693 | 7,447,829 | 1.328 | 10,873,395 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 65: Trans., Comm. & Utilities Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 66: Trans., Comm. & Utilities Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$23,802 | \$717,937 | \$8,121,923 | \$91,991,463 |
| 1995 | \$26,308 | \$910,341 | \$12,198,635 | \$126,914,210 |
| 2000 | \$46,813 | \$1,193,508 | \$18,682,979 | \$187,034,834 |
| 2005 | \$54,632 | \$1,392,855 | \$19,959,135 | \$199,810,399 |
| 2010 | \$61,448 | \$1,566,640 | \$20,934,747 | \$209,577,224 |
| 2015 | \$69,594 | \$1,774,315 | \$21,826,450 | \$218,504,044 |
| 2020 | \$77,739 | \$1,981,977 | \$22,661,384 | \$226,862,549 |
| 2025 | \$89,051 | \$2,204,396 | \$27,073,005 | \$267,290,006 |
| 2030 | \$98,444 | \$2,414,868 | \$29,398,926 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

7. Wholesale Trade

Exhibit 67 shows that Georgia has a regional specialization in the wholesale trade sector of the economy while Carroll County does not contribute the State’s prominence of this field. Projections indicate that as Georgia continues to specialize, Carroll County will contribute to the trend although wholesale trade in Carroll County will not be a significant employer relative to the manufacturing sector. **Exhibit 68** illustrates that only modest growth in this sector is projected for Carroll County.

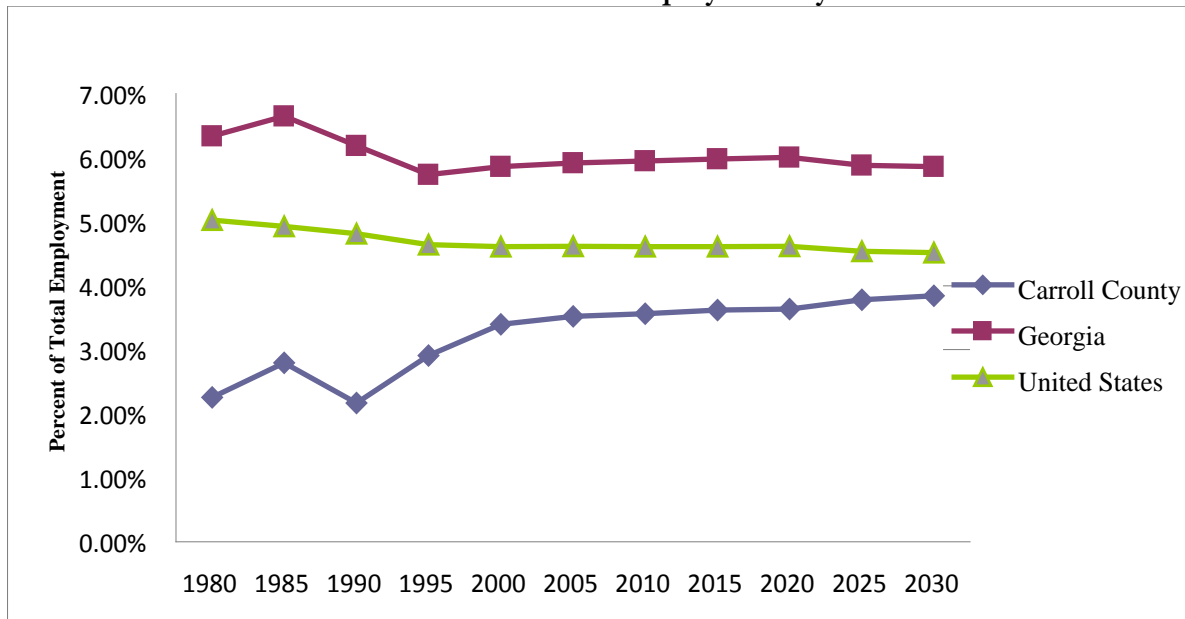
Exhibit 67: Wholesale Trade Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 590 | 26,180 | 0.448 | 174,084 | 2,747,311 | 1.261 | 5,741,685 | 114,231,182 |
| 1985 | 877 | 31,361 | 0.567 | 214,310 | 3,224,299 | 1.349 | 6,136,100 | 124,511,691 |
| 1990 | 770 | 35,550 | 0.450 | 228,213 | 3,690,605 | 1.285 | 6,711,500 | 139,426,897 |
| 1995 | 1,110 | 38,180 | 0.627 | 242,507 | 4,229,292 | 1.236 | 6,930,511 | 149,358,792 |
| 2000 | 1,400 | 41,240 | 0.737 | 283,542 | 4,840,483 | 1.271 | 7,664,629 | 166,323,450 |
| 2005 | 1,704 | 48,378 | 0.763 | 310,031 | 5,238,962 | 1.282 | 8,183,406 | 177,306,786 |
| 2010 | 1,957 | 54,914 | 0.773 | 334,712 | 5,625,704 | 1.290 | 8,668,602 | 187,986,707 |
| 2015 | 2,224 | 61,411 | 0.785 | 359,428 | 6,012,137 | 1.296 | 9,177,403 | 199,015,385 |
| 2020 | 2,506 | 68,974 | 0.787 | 383,515 | 6,389,771 | 1.300 | 9,710,598 | 210,360,566 |
| 2025 | 2,683 | 70,986 | 0.833 | 410,616 | 6,984,276 | 1.296 | 10,172,159 | 224,260,403 |
| 2030 | 2,927 | 76,157 | 0.851 | 436,509 | 7,447,829 | 1.298 | 10,674,936 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc and Carroll Tomorrow. Update by PRISM Associates



Exhibit 68: Wholesale Trade Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 69: Wholesale Trade Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$21,249 | \$717,937 | \$8,240,264 | \$91,991,463 |
| 1995 | \$31,043 | \$910,341 | \$10,436,625 | \$126,914,210 |
| 2000 | \$47,483 | \$1,193,508 | \$16,206,907 | \$187,034,834 |
| 2005 | \$55,414 | \$1,392,855 | \$17,313,933 | \$199,810,399 |
| 2010 | \$62,328 | \$1,566,640 | \$18,160,246 | \$209,577,224 |
| 2015 | \$70,590 | \$1,774,315 | \$18,933,771 | \$218,504,044 |
| 2020 | \$78,852 | \$1,981,977 | \$19,658,051 | \$226,862,549 |
| 2025 | \$90,530 | \$2,204,396 | \$23,164,398 | \$267,290,006 |
| 2030 | \$100,056 | \$2,414,868 | \$25,064,434 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

8. Retail Trade

Carroll County’s and Georgia’s retail trade sectors are comparable to that of the nation, therefore no significant specialization currently exists in the two jurisdictions (**Exhibit 70**). This indicates that local needs are being sufficiently met by local economic activity within Carroll County. However, Carroll County is projected to become increasingly specialized in this sector. Retail trade employment as a percent of total employment is projected to increase within the County. (**Exhibit 71**).

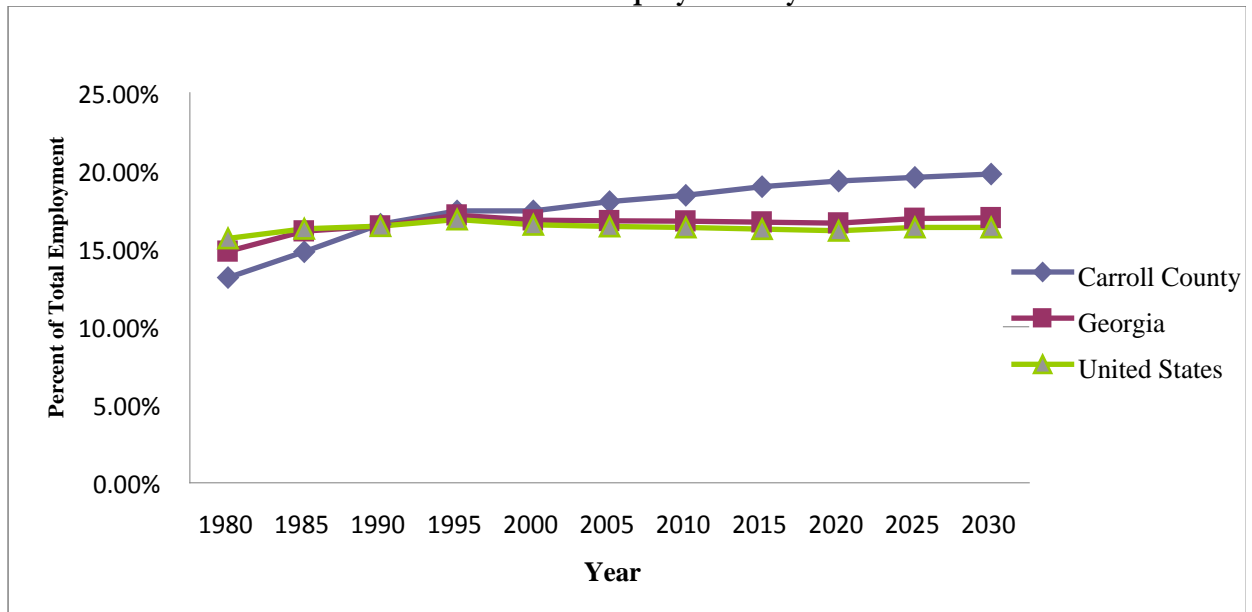


Exhibit 70: Retail Trade Sector Location Quotients (1980-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 3,440 | 26,180 | 0.839 | 407,627 | 2,747,311 | 0.948 | 17,883,900 | 114,231,182 |
| 1985 | 4,644 | 31,361 | 0.910 | 520,232 | 3,224,299 | 0.992 | 20,261,800 | 124,511,691 |
| 1990 | 5,890 | 35,550 | 1.008 | 606,608 | 3,690,605 | 1.000 | 22,920,508 | 139,426,897 |
| 1995 | 6,650 | 38,180 | 1.032 | 724,947 | 4,229,292 | 1.016 | 25,204,235 | 149,358,792 |
| 2000 | 7,190 | 41,250 | 1.055 | 814,714 | 4,840,483 | 1.018 | 27,487,436 | 166,323,450 |
| 2005 | 8,717 | 48,378 | 1.096 | 879,669 | 5,238,962 | 1.022 | 29,138,522 | 177,306,786 |
| 2010 | 10,118 | 54,914 | 1.127 | 943,043 | 5,625,704 | 1.025 | 30,744,072 | 187,986,707 |
| 2015 | 11,652 | 61,411 | 1.167 | 1,004,768 | 6,012,137 | 1.028 | 32,353,943 | 199,015,385 |
| 2020 | 13,345 | 68,974 | 1.198 | 1,063,098 | 6,389,771 | 1.031 | 33,959,691 | 210,360,566 |
| 2025 | 13,891 | 70,987 | 1.197 | 1,182,447 | 6,984,276 | 1.035 | 36,674,985 | 224,260,403 |
| 2030 | 15,077 | 76,158 | 1.210 | 1,264,165 | 7,447,829 | 1.038 | 38,677,668 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 71: Retail Trade Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 72: Retail Trade Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$70,489 | \$717,937 | \$8,467,542 | \$91,991,463 |
| 1995 | \$90,936 | \$910,341 | \$11,479,924 | \$126,914,210 |
| 2000 | \$120,478 | \$1,193,508 | \$16,409,688 | \$187,034,834 |
| 2005 | \$140,601 | \$1,392,855 | \$17,530,565 | \$199,810,399 |
| 2010 | \$158,144 | \$1,566,640 | \$18,387,467 | \$209,577,224 |
| 2015 | \$179,107 | \$1,774,315 | \$19,170,671 | \$218,504,044 |
| 2020 | \$200,070 | \$1,981,977 | \$19,904,012 | \$226,862,549 |
| 2025 | \$223,225 | \$2,204,396 | \$23,288,365 | \$267,290,006 |
| 2030 | \$244,752 | \$2,414,868 | \$25,133,675 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

9. Finance, Insurance & Real Estate (FIRE)

The FIRE sector does not represent a specialization for either the County or Georgia (Exhibit 73). Historic, current and projected location quotients for Carroll County range between 0.608 and 0.725 while Georgia’s range from 0.821 to 0.949. Projections suggest modest increase in FIRE sector employment in Georgia and a minor decline in Carroll County (Exhibit 74).

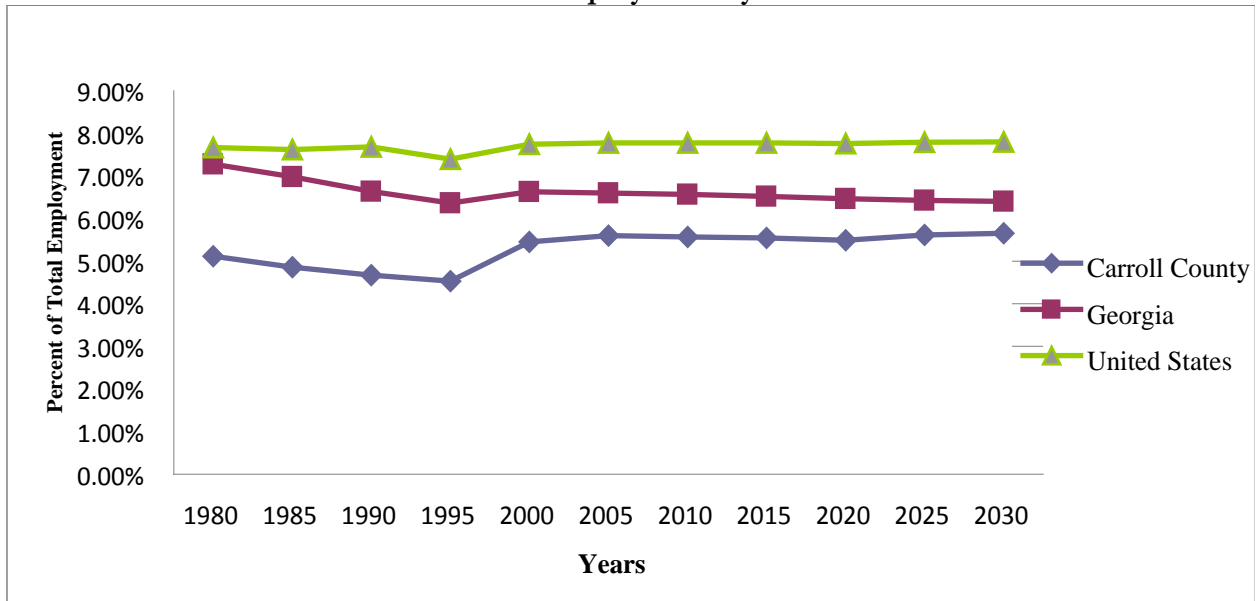
Exhibit 73: FIRE Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 1,340 | 26,180 | 0.668 | 199,886 | 2,747,311 | 0.949 | 8,756,005 | 114,231,182 |
| 1985 | 1,523 | 31,361 | 0.637 | 225,090 | 3,224,299 | 0.916 | 9,491,991 | 124,511,691 |
| 1990 | 1,660 | 35,550 | 0.608 | 244,947 | 3,690,605 | 0.864 | 10,712,601 | 139,426,897 |
| 1995 | 1,730 | 38,180 | 0.613 | 269,180 | 4,229,292 | 0.861 | 11,037,790 | 149,358,792 |
| 2000 | 2,250 | 41,250 | 0.705 | 320,807 | 4,840,483 | 0.856 | 12,876,552 | 166,323,450 |
| 2005 | 2,710 | 48,378 | 0.721 | 345,677 | 5,238,962 | 0.849 | 13,784,144 | 177,306,786 |
| 2010 | 3,060 | 54,914 | 0.716 | 369,400 | 5,625,704 | 0.844 | 14,622,396 | 187,986,707 |
| 2015 | 3,405 | 61,411 | 0.713 | 392,111 | 6,012,137 | 0.839 | 15,471,643 | 199,015,385 |
| 2020 | 3,786 | 68,974 | 0.707 | 413,052 | 6,389,771 | 0.833 | 16,327,918 | 210,360,566 |
| 2025 | 3,986 | 70,987 | 0.721 | 448,833 | 6,984,276 | 0.825 | 17,463,939 | 224,260,403 |
| 2030 | 4,306 | 76,158 | 0.725 | 476,819 | 7,447,829 | 0.821 | 18,443,815 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 74: FIRE Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 75: FIRE Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$23,892 | \$717,937 | \$5,729,450 | \$91,991,463 |
| 1995 | \$35,611 | \$910,341 | \$8,665,193 | \$126,914,210 |
| 2000 | \$44,342 | \$1,193,508 | \$14,493,039 | \$187,034,834 |
| 2005 | \$51,748 | \$1,392,855 | \$15,482,998 | \$199,810,399 |
| 2010 | \$58,205 | \$1,566,640 | \$16,239,814 | \$209,577,224 |
| 2015 | \$65,921 | \$1,774,315 | \$16,931,539 | \$218,504,044 |
| 2020 | \$73,636 | \$1,981,977 | \$17,579,227 | \$226,862,549 |
| 2025 | \$82,439 | \$2,204,396 | \$21,278,580 | \$267,290,006 |
| 2030 | \$90,428 | \$2,414,868 | \$23,201,037 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

10. Service

According to location quotient analysis of service sector employment (**Exhibit 76**), Georgia will gravitate towards service self-sufficiency. Carroll County is a net importer of services and it is anticipated that the amount of imports will slightly increase over the next 20 years. The global trend towards a service-based economy is reflected in the historic, current and projected growth in service industry employment (**Exhibit 77**). Service employment in Carroll County is expected to comprise 26% of total employment by 2030.

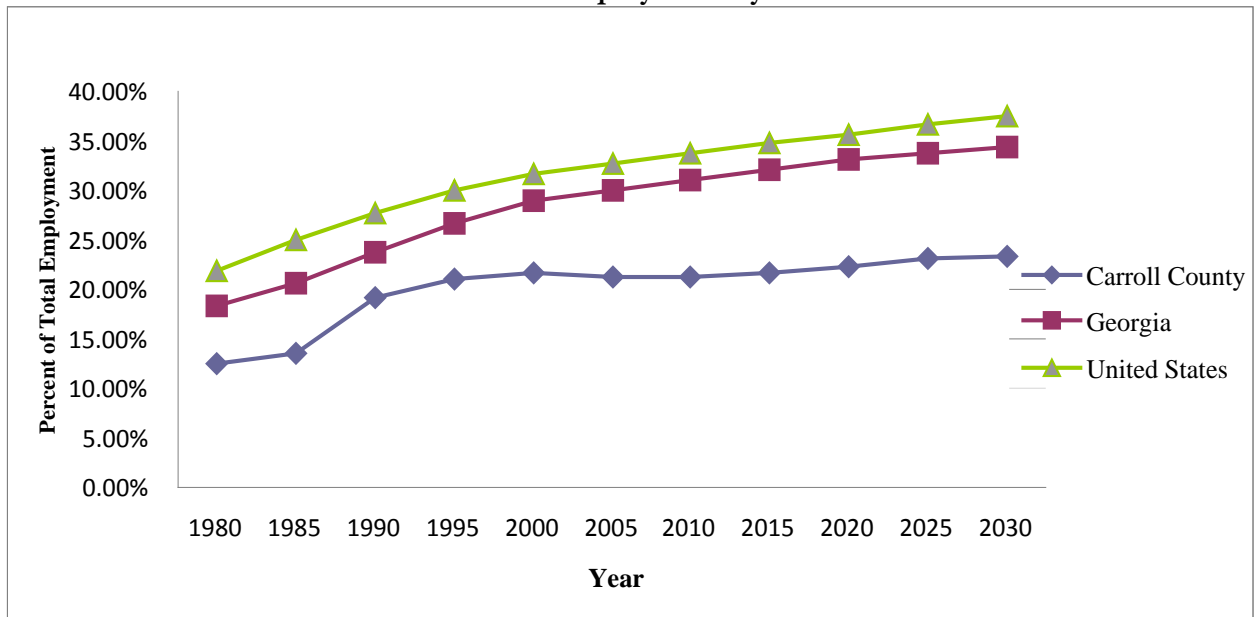


Exhibit 76: Service Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 3,260 | 26,180 | 0.569 | 502,840 | 2,747,311 | 0.836 | 24,999,605 | 114,231,182 |
| 1985 | 4,231 | 31,361 | 0.538 | 664,478 | 3,224,299 | 0.821 | 31,241,473 | 124,511,691 |
| 1990 | 6,830 | 35,550 | 0.692 | 876,598 | 3,690,605 | 0.856 | 38,709,648 | 139,426,897 |
| 1995 | 8,070 | 38,180 | 0.705 | 1,125,366 | 4,229,292 | 0.888 | 44,768,272 | 149,358,792 |
| 2000 | 8,960 | 41,240 | 0.686 | 1,397,841 | 4,840,483 | 0.912 | 52,669,141 | 166,323,450 |
| 2005 | 10,322 | 48,378 | 0.652 | 1,570,648 | 5,238,962 | 0.916 | 58,051,723 | 177,306,786 |
| 2010 | 11,684 | 54,914 | 0.631 | 1,744,107 | 5,625,704 | 0.919 | 63,428,235 | 187,986,707 |
| 2015 | 13,316 | 61,411 | 0.625 | 1,926,018 | 6,012,137 | 0.923 | 69,055,428 | 199,015,385 |
| 2020 | 15,306 | 68,974 | 0.623 | 2,112,872 | 6,389,771 | 0.929 | 74,913,490 | 210,360,566 |
| 2025 | 16,392 | 70,986 | 0.630 | 2,358,284 | 6,984,276 | 0.921 | 82,188,949 | 224,260,403 |
| 2030 | 17,849 | 76,157 | 0.627 | 2,565,035 | 7,447,829 | 0.921 | 88,452,582 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 77: Service Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 78: Service Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$119,147 | \$717,937 | \$20,057,280 | \$91,991,463 |
| 1995 | \$167,001 | \$910,341 | \$30,485,258 | \$126,914,210 |
| 2000 | \$241,885 | \$1,193,508 | \$50,924,609 | \$187,034,834 |
| 2005 | \$282,286 | \$1,392,855 | \$54,403,055 | \$199,810,399 |
| 2010 | \$317,507 | \$1,566,640 | \$57,062,302 | \$209,577,224 |
| 2015 | \$359,596 | \$1,774,315 | \$59,492,838 | \$218,504,044 |
| 2020 | \$401,682 | \$1,981,977 | \$61,768,636 | \$226,862,549 |
| 2025 | \$456,789 | \$2,204,396 | \$74,782,986 | \$267,290,006 |
| 2030 | \$503,518 | \$2,414,868 | \$81,543,233 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

11. Federal Civilian Government

While Georgia has a slight specialization in federal civilian fields, Carroll County is a net importer of services provided by the federal civilian workforce (**Exhibit 79**). Unless a local jurisdiction hosts federal installations, offices and functions with a regional, national or international mission, federal civilian employment is limited to local domestic administrative functions. **Exhibit 80** illustrates that Carroll County does not host federal civilian functions beyond those used directly by local populations. Total federal civilian employment is projected to fall as a percent of all employment.

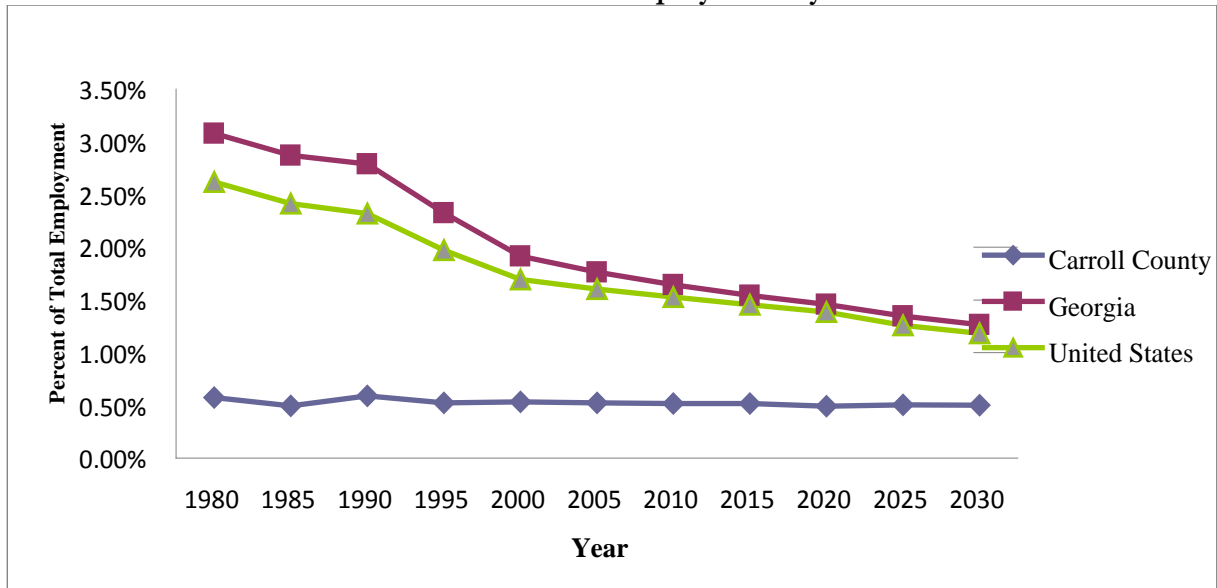
Exhibit 79: Federal Civilian Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 150 | 26,180 | 0.219 | 84,599 | 2,747,311 | 1.175 | 2,993,986 | 114,231,182 |
| 1985 | 155 | 31,361 | 0.205 | 92,561 | 3,224,299 | 1.188 | 3,007,999 | 124,511,691 |
| 1990 | 210 | 35,550 | 0.255 | 102,981 | 3,690,605 | 1.203 | 3,233,004 | 139,426,897 |
| 1995 | 200 | 38,180 | 0.266 | 98,336 | 4,229,292 | 1.179 | 2,946,001 | 149,358,792 |
| 2000 | 220 | 41,240 | 0.315 | 92,736 | 4,840,483 | 1.131 | 2,818,642 | 166,323,450 |
| 2005 | 254 | 48,378 | 0.327 | 92,421 | 5,238,962 | 1.100 | 2,844,642 | 177,306,786 |
| 2010 | 285 | 54,914 | 0.340 | 92,499 | 5,625,704 | 1.077 | 2,869,756 | 187,986,707 |
| 2015 | 318 | 61,411 | 0.356 | 92,773 | 6,012,137 | 1.061 | 2,894,092 | 199,015,385 |
| 2020 | 340 | 68,974 | 0.355 | 93,131 | 6,389,771 | 1.051 | 2,917,420 | 210,360,566 |
| 2025 | 358 | 70,986 | 0.400 | 94,217 | 6,984,276 | 1.071 | 2,824,296 | 224,260,403 |
| 2030 | 382 | 76,157 | 0.424 | 94,348 | 7,447,829 | 1.070 | 2,799,698 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 80: Federal Civilian Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 81: Federal Civilian Government Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$7,669 | \$717,937 | \$4,265,441 | \$91,991,463 |
| 1995 | \$9,194 | \$910,341 | \$5,258,562 | \$126,914,210 |
| 2000 | \$12,634 | \$1,193,508 | \$6,379,642 | \$187,034,834 |
| 2005 | \$14,744 | \$1,392,855 | \$6,815,409 | \$199,810,399 |
| 2010 | \$16,584 | \$1,566,640 | \$7,148,549 | \$209,577,224 |
| 2015 | \$18,782 | \$1,774,315 | \$7,453,037 | \$218,504,044 |
| 2020 | \$20,980 | \$1,981,977 | \$7,738,141 | \$226,862,549 |
| 2025 | \$23,378 | \$2,204,396 | \$8,662,105 | \$267,290,006 |
| 2030 | \$25,630 | \$2,414,868 | \$9,218,390 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.

12. Federal Military Government

Georgia has a slight specialization in military operations while Carroll County has relatively little (**Exhibit 82**). Similar to federal civilian employment, the regional, national and international mission of the military limits military employment to local reserves and military installations. Carroll County does not have a military operations base. Military employment as a percent of total employment is expected to decline (**Exhibit 83**).

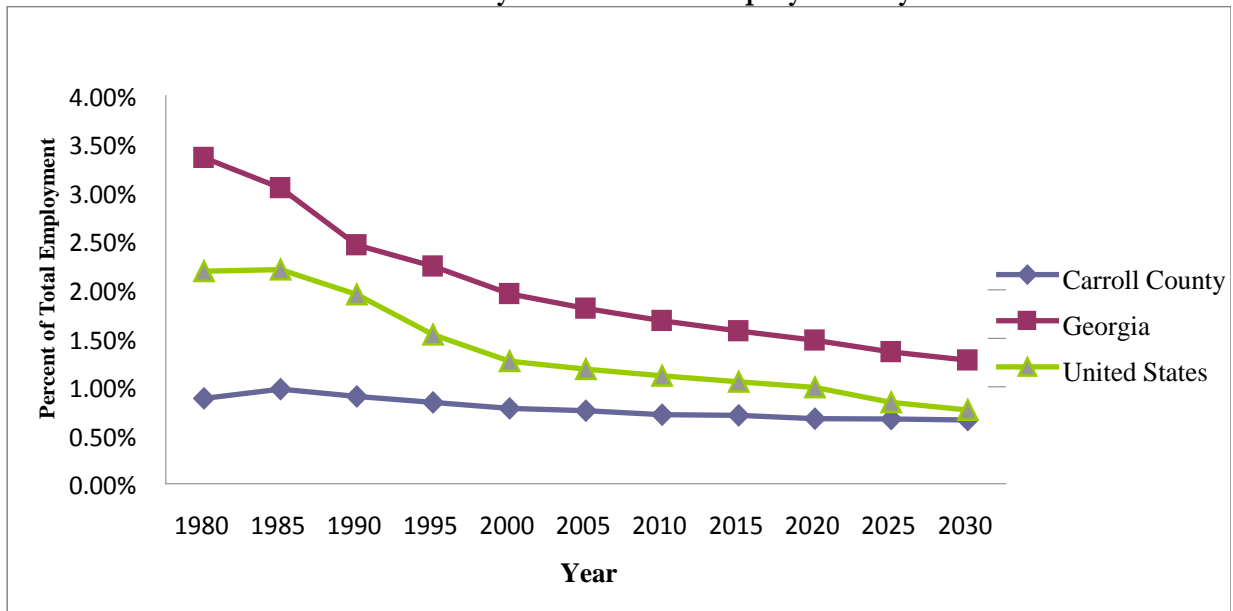


Exhibit 82: Federal Military Government Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 230 | 26180 | 0.401 | 92,295 | 2,747,311 | 1.534 | 2,501,014 | 114,231,182 |
| 1985 | 306 | 31,361 | 0.442 | 98,319 | 3,224,299 | 1.383 | 2,746,001 | 124,511,691 |
| 1990 | 320 | 35,550 | 0.462 | 90,745 | 3,690,605 | 1.261 | 2,717,996 | 139,426,897 |
| 1995 | 320 | 38,180 | 0.546 | 94,733 | 4,229,292 | 1.459 | 2,292,999 | 149,358,792 |
| 2000 | 320 | 41,240 | 0.615 | 94,779 | 4,840,483 | 1.553 | 2,097,248 | 166,323,450 |
| 2005 | 365 | 48,378 | 0.638 | 94,695 | 5,238,962 | 1.530 | 2,095,258 | 177,306,786 |
| 2010 | 391 | 54,914 | 0.639 | 94,604 | 5,625,704 | 1.510 | 2,093,407 | 187,986,707 |
| 2015 | 432 | 61,411 | 0.669 | 94,538 | 6,012,137 | 1.496 | 2,091,790 | 199,015,385 |
| 2020 | 463 | 68,974 | 0.676 | 94,475 | 6,389,771 | 1.488 | 2,090,372 | 210,360,566 |
| 2025 | 474 | 70986 | 0.796 | 94,775 | 6,984,276 | 1.617 | 1,881,888 | 224,260,403 |
| 2030 | 499 | 76157 | 0.863 | 94,859 | 7,447,829 | 1.675 | 1,797,686 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates

Exhibit 83: Federal Military Government Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates



Exhibit 84: Federal Military Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$3,206 | \$717,937 | \$2,512,476 | \$91,991,463 |
| 1995 | \$3,794 | \$910,341 | \$3,188,672 | \$126,914,210 |
| 2000 | \$4,401 | \$1,193,508 | \$3,874,950 | \$187,034,834 |
| 2005 | \$5,136 | \$1,392,855 | \$4,139,632 | \$199,810,399 |
| 2010 | \$5,777 | \$1,566,640 | \$4,341,979 | \$209,577,224 |
| 2015 | \$6,543 | \$1,774,315 | \$4,526,923 | \$218,504,044 |
| 2020 | \$7,308 | \$1,981,977 | \$4,700,093 | \$226,862,549 |
| 2025 | \$7,906 | \$2,204,396 | \$5,284,444 | \$267,290,006 |
| 2030 | \$8,591 | \$2,414,868 | \$5,631,100 | \$289,087,695 |

Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates

13. State and Local Government

In theory, Carroll County appears to be a net exporter of state and local government services; therefore the County has some degree of specialization as does Georgia (**Exhibit 85**). In practice, local government services are not exported from the County nor are state government services exported beyond the state boundary. Variations in Carroll County’s location quotient are likely due to state government employees that provide regional services. Some of this may be attributed to the University of West Georgia. State and local government employees are projected to constitute an increasing percentage of the total employment in Carroll County (**Exhibit 86**).

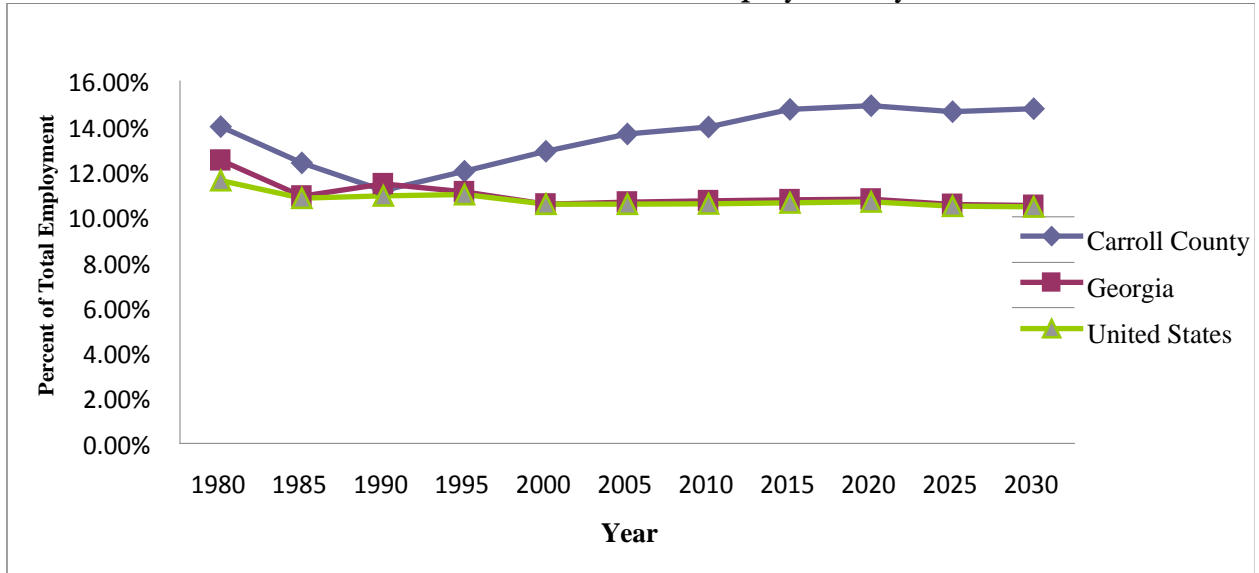
Exhibit 85: State and Local Government Sector Location Quotients (1990-2030)

| Year | Carroll County | | | Georgia | | | United States | |
|------|-------------------|------------------|-------------------|-------------------|------------------|-------------------|-------------------|------------------|
| | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment | Location Quotient | Sector Employment | Total Employment |
| 1980 | 3,660 | 26,180 | 1.204 | 343,553 | 2,747,311 | 1.077 | 13,263,000 | 114,231,182 |
| 1985 | 3,884 | 31,361 | 1.144 | 352,189 | 3,224,299 | 1.009 | 13,484,000 | 124,511,691 |
| 1990 | 3,970 | 35,550 | 1.021 | 422,991 | 3,690,605 | 1.048 | 15,245,000 | 139,426,897 |
| 1995 | 4,590 | 38,180 | 1.094 | 469,941 | 4,229,292 | 1.012 | 16,406,000 | 149,358,792 |
| 2000 | 5,320 | 41,240 | 1.221 | 511,618 | 4,840,483 | 1.001 | 17,566,102 | 166,323,450 |
| 2005 | 6,609 | 48,378 | 1.293 | 558,136 | 5,238,962 | 1.009 | 18,729,451 | 177,306,786 |
| 2010 | 7,675 | 54,914 | 1.320 | 602,719 | 5,625,704 | 1.012 | 19,898,851 | 187,986,707 |
| 2015 | 9,060 | 61,411 | 1.390 | 646,414 | 6,012,137 | 1.013 | 21,129,366 | 199,015,385 |
| 2020 | 10,281 | 68,974 | 1.398 | 688,975 | 6,389,771 | 1.012 | 22,423,397 | 210,360,566 |
| 2025 | 10,403 | 70,986 | 1.398 | 736,727 | 6,984,276 | 1.006 | 23,505,755 | 224,260,403 |
| 2030 | 11,261 | 76,157 | 1.416 | 781,928 | 7,447,829 | 1.005 | 24,692,569 | 236,478,674 |

Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates.



Exhibit 86: State and Local Government Employment by Percent



Source: Planning Works with data from Woods & Poole Economics, Inc. and Carroll Tomorrow. Update by PRISM Associates.

Exhibit 87: State and Local Government Sector Earnings (1990-2030)

In Thousands of Dollars

| Year | Carroll County | | Georgia | |
|------|-----------------|----------------|-----------------|----------------|
| | Sector Earnings | Total Earnings | Sector Earnings | Total Earnings |
| 1990 | \$98,008 | \$717,937 | \$10,982,719 | \$91,991,463 |
| 1995 | \$124,609 | \$910,341 | \$13,992,415 | \$126,914,210 |
| 2000 | \$183,334 | \$1,193,508 | \$18,272,615 | \$187,034,834 |
| 2005 | \$213,955 | \$1,392,855 | \$19,520,741 | \$199,810,399 |
| 2010 | \$240,651 | \$1,566,640 | \$20,474,924 | \$209,577,224 |
| 2015 | \$272,551 | \$1,774,315 | \$21,347,041 | \$218,504,044 |
| 2020 | \$304,450 | \$1,981,977 | \$22,163,636 | \$226,862,549 |
| 2025 | \$344,298 | \$2,204,396 | \$25,315,486 | \$267,290,006 |
| 2030 | \$379,031 | \$2,414,868 | \$27,117,426 | \$289,087,695 |

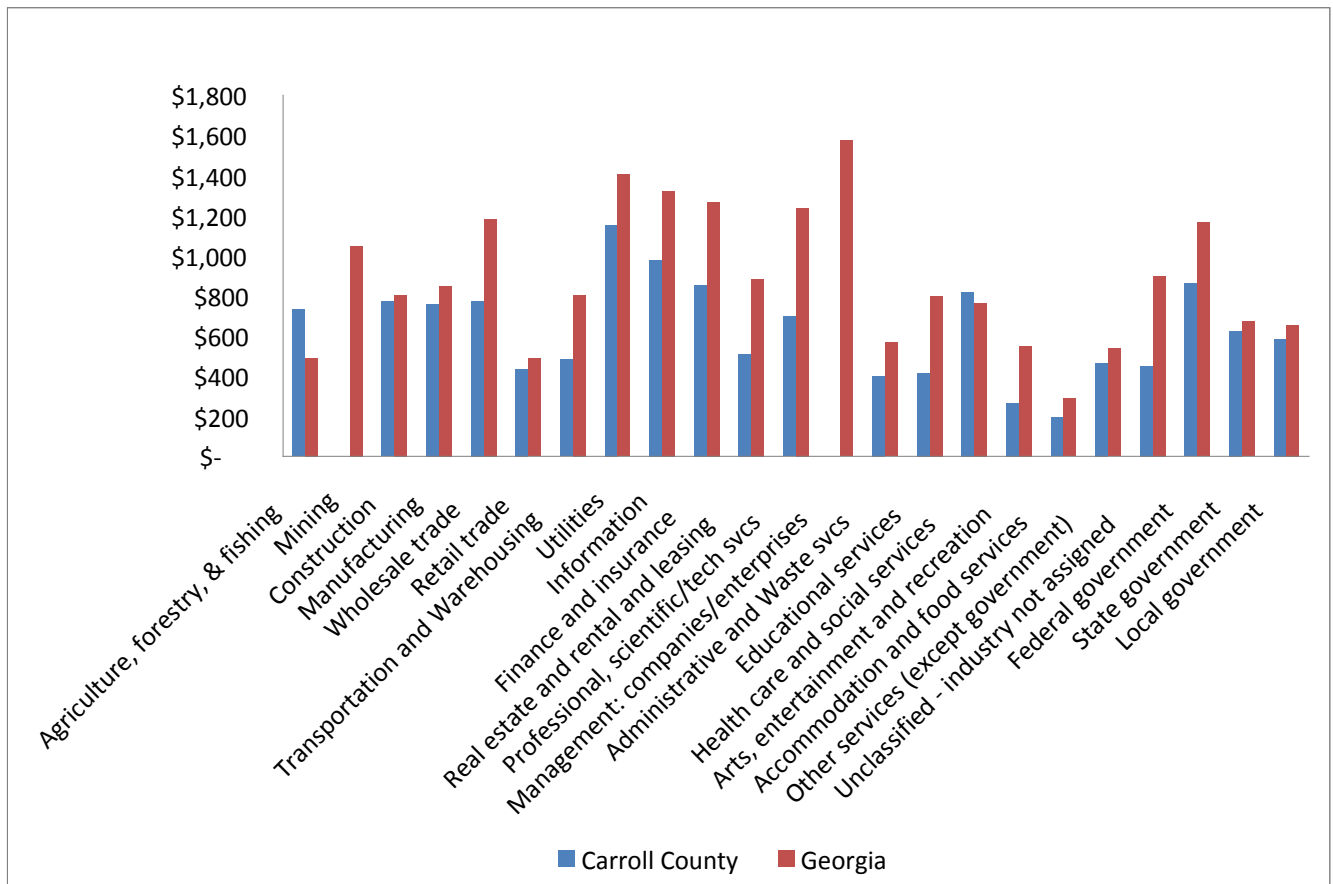
Source: 1990 – 2000 data from the Bureau of Economic Analysis; projections through 2020 by Planning Works, projections from 2020 through 2030 by PRISM Associates.



B. INCOME AND WAGES

Between 1989 and 1999, historical average weekly wages were lower in Carroll County than in the State for all employment sectors for which data are available (**Exhibit 88 & 89**). In 1999, the average weekly wages for all industries were 27.8% higher for Georgia than they were for Carroll County, \$629 and \$492 respectively. The most significant disparities occurred in wholesale trade and FIRE industries where Georgia’s wages were 75.8% and 74.4% higher than Carroll County’s. The smallest difference ranges between 12.5% and 12.9% in construction, manufacturing and state government.

Exhibit 88: 1999 Average Weekly Wage Rates by Sector



Source: Woods & Poole, Calculations by PRISM Associates



Exhibit 89: Average Weekly Wage Rates by Sector (1989-1999)

| Georgia: Average Weekly Wages | | | | | | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Sector | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 |
| All Industries | \$404 | \$424 | \$444 | \$471 | \$480 | \$488 | \$509 | \$531 | \$562 | \$598 | \$629 |
| Agriculture, Forestry, Fishing | \$267 | \$276 | \$285 | \$297 | \$304 | \$312 | \$322 | \$336 | \$347 | \$373 | \$390 |
| Mining | \$561 | \$589 | \$605 | NA | NA | \$698 | \$734 | \$741 | \$781 | \$832 | \$866 |
| Construction | NA | \$434 | \$439 | \$451 | \$461 | \$479 | \$508 | \$534 | \$556 | \$590 | \$623 |
| Manufacturing | NA | \$450 | \$473 | \$503 | \$511 | \$531 | \$555 | \$588 | \$620 | \$656 | \$684 |
| Transportation, Comm, Utilities | NA | \$603 | \$635 | \$689 | \$709 | \$720 | \$737 | \$769 | \$805 | \$842 | \$895 |
| Wholesale Trade | NA | \$603 | \$632 | \$669 | \$695 | \$711 | \$729 | \$762 | \$809 | \$873 | \$932 |
| Retail Trade | NA | \$236 | \$244 | \$255 | \$260 | \$267 | \$275 | \$286 | \$299 | \$318 | \$335 |
| Financial, Insurance & Real Estate | NA | \$544 | \$569 | \$627 | \$648 | \$648 | \$693 | \$741 | \$799 | \$872 | \$900 |
| Services | NA | \$414 | \$439 | \$464 | \$471 | \$475 | \$501 | \$519 | \$551 | \$580 | \$611 |
| Federal Government | NA | \$543 | \$584 | \$612 | \$651 | \$667 | \$666 | \$701 | \$774 | \$791 | \$808 |
| State Government | NA | \$451 | \$462 | \$460 | \$471 | NA | \$493 | \$517 | \$533 | \$561 | \$579 |
| Local Government | NA | \$387 | \$401 | \$401 | \$410 | \$420 | \$440 | \$461 | \$480 | \$506 | \$523 |
| Carroll County: Average Weekly Wages | | | | | | | | | | | |
| Sector | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 |
| All Industries | \$333 | \$353 | \$367 | \$375 | \$387 | \$392 | \$406 | \$429 | \$444 | \$471 | \$492 |
| Agriculture, Forestry, Fishing | \$246 | \$242 | \$243 | \$269 | \$268 | \$296 | NA | NA | NA | \$341 | NA |
| Mining | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| Construction | NA | \$388 | \$407 | \$412 | \$415 | \$428 | \$483 | \$508 | \$525 | \$548 | \$554 |
| Manufacturing | NA | \$389 | \$401 | \$408 | \$429 | \$444 | \$465 | \$504 | \$522 | \$563 | \$608 |
| Transportation, Comm, Utilities | NA | \$519 | \$520 | \$554 | \$542 | \$533 | \$570 | \$573 | \$637 | \$615 | \$625 |
| Wholesale Trade | NA | \$423 | \$447 | \$465 | \$466 | \$463 | \$455 | \$499 | \$521 | \$541 | \$530 |
| Retail Trade | NA | \$203 | \$213 | \$224 | \$226 | \$233 | \$229 | \$236 | \$239 | \$254 | \$268 |
| Financial, Insurance & Real Estate | NA | \$419 | \$430 | \$437 | \$469 | \$476 | \$495 | \$509 | \$542 | \$543 | \$516 |
| Services | NA | \$333 | \$355 | \$372 | \$389 | \$381 | \$406 | \$433 | \$446 | \$468 | \$483 |
| Federal Government | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA | NA |
| State Government | NA | NA | NA | NA | NA | NA | \$466 | \$495 | \$490 | \$504 | \$513 |
| Local Government | NA | NA | NA | NA | NA | NA | \$362 | \$383 | NA | NA | NA |

Source: U.S. Bureau of Labor Statistics

Historic data and projections indicate that, at the national, state and local levels, local reliance on transfer payments will increase as finances from wage and salaries will decrease (**Exhibit 91**). In Carroll County, transfer payments (social security, veterans benefits, welfare, food stamps, WIC, etc.) contribute approximately 15.7% of personal income in 2000, which is a higher percent than for Georgia and the nation. Reliance on transfer payments will increase as the “baby boom” generation retires and their personal income shifts from wages and salaries. The percent of income from dividends, interest and rent is anticipated to remain flat through 2020.



Exhibit 90: Sources of Personal Income (1980-2020)

| United States: Income by Type (%) | | | | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Category | 1980 | 1985 | 1990 | 1995 | 2000 | 2005 | 2010 | 2015 | 2020 |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |
| Wages & Salaries | 59.22% | 56.73% | 56.16% | 55.25% | 57.21% | 57.40% | 57.47% | 57.49% | 57.48% |
| Other Labor Income | 7.89% | 7.90% | 7.85% | 7.96% | 6.95% | 6.87% | 6.78% | 6.68% | 6.58% |
| Proprietors Income | 7.65% | 7.64% | 7.80% | 8.04% | 8.20% | 8.12% | 8.05% | 7.98% | 7.90% |
| Dividends, Interest, & Rent | 16.49% | 19.51% | 20.18% | 18.79% | 18.64% | 18.61% | 18.61% | 18.59% | 18.55% |
| Transfer Payments to Persons | 12.09% | 12.04% | 12.17% | 14.31% | 13.32% | 13.51% | 13.83% | 14.25% | 14.77% |
| Less: Social Ins. Contributions | 3.33% | 3.81% | 4.15% | 4.33% | 4.32% | 4.51% | 4.73% | 5.00% | 5.29% |
| Residence Adjustment | -0.02% | -0.02% | -0.02% | -0.01% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Georgia: Income by Type (%) | | | | | | | | | |
| Category | 1980 | 1985 | 1990 | 1995 | 2000 | 2005 | 2010 | 2015 | 2020 |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |
| Wages & Salaries | 64.10% | 62.15% | 60.36% | 59.07% | 61.06% | 61.09% | 61.00% | 60.88% | 60.72% |
| Other Labor Income | 8.41% | 8.72% | 8.68% | 8.63% | 7.74% | 7.62% | 7.49% | 7.35% | 7.22% |
| Proprietors Income | 6.51% | 6.97% | 7.11% | 7.96% | 8.21% | 8.11% | 8.02% | 7.94% | 7.84% |
| Dividends, Interest, & Rent | 13.05% | 15.79% | 17.34% | 16.31% | 16.13% | 15.98% | 15.87% | 15.78% | 15.73% |
| Transfer Payments to Persons | 11.72% | 10.73% | 10.94% | 12.62% | 11.48% | 11.55% | 11.74% | 12.05% | 12.48% |
| Less: Social Ins. Contributions | 3.54% | 4.10% | 4.33% | 4.45% | 4.47% | 4.65% | 4.88% | 5.14% | 5.44% |
| Residence Adjustment | -0.25% | -0.25% | -0.10% | -0.15% | -0.16% | 0.31% | 0.75% | 1.14% | 1.45% |
| Carroll County: Income by Type (%) | | | | | | | | | |
| Category | 1980 | 1985 | 1990 | 1995 | 2000 | 2005 | 2010 | 2015 | 2020 |
| Total | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |
| Wages & Salaries | 55.66% | 52.89% | 51.76% | 49.69% | 48.99% | 49.18% | 49.06% | 48.80% | 48.40% |
| Other Labor Income | 7.40% | 6.96% | 7.56% | 7.20% | 5.98% | 5.93% | 5.84% | 5.73% | 5.61% |
| Proprietors Income | 7.68% | 7.92% | 7.89% | 7.12% | 8.12% | 8.03% | 7.93% | 7.80% | 7.65% |
| Dividends, Interest, & Rent | 12.15% | 15.44% | 16.34% | 14.81% | 15.59% | 15.54% | 15.62% | 15.74% | 15.87% |
| Transfer Payments to Persons | 14.23% | 13.33% | 13.51% | 16.95% | 15.69% | 15.99% | 16.55% | 17.30% | 18.22% |
| Less: Social Ins. Contributions | 3.27% | 3.70% | 3.96% | 3.94% | 3.67% | 3.83% | 4.00% | 4.19% | 4.41% |
| Residence Adjustment | 6.17% | 7.16% | 6.90% | 8.17% | 9.30% | 9.16% | 9.00% | 8.83% | 8.66% |

Source: Woods & Poole



C. EMPLOYMENT AND LABOR FORCE

The most prominent feature of Carroll County’s labor force has been the large proportion of blue-collar manufacturing and assembly workers and small professional, clerical and technical work force. **Exhibit 91** and **Exhibit 92** compare the percentage of the labor force by occupation for Carroll County, Georgia, and the U.S.²⁹. This data highlights Carroll County’s strong manufacturing sector with greater local percentages of employees involved in “precision production, craft and repair” and “machine operators, assemblers and inspectors”.

Exhibit 91: Percent of Employment by Occupation (1990)

| Occupation Category | Carroll County | Georgia | U.S. |
|---|----------------|---------|---------|
| Executive, Administrative and Managerial (not Farm) | 8.1% | 12.3% | 12.3% |
| Professional and Technical Specialty | 10.3% | 12.4% | 14.1% |
| Technicians & Related Support | 2.7% | 3.6% | 3.7% |
| Sales | 11.2% | 12.3% | 11.8% |
| Clerical and Administrative Support | 12.9% | 16.0% | 16.3% |
| Private Household Services | 0.3% | 0.5% | 0.5% |
| Protective Services | 1.5% | 1.7% | 1.7% |
| Service Occupations (not Protective & Household) | 8.6% | 9.8% | 11.1% |
| Farming, Fishing and Forestry | 2.1% | 2.2% | 2.5% |
| Precision Production, Craft, and Repair | 15.6% | 11.9% | 11.3% |
| Machine Operators, Assemblers & Inspectors | 14.4% | 8.5% | 6.8% |
| Transportation & Material Moving | 5.9% | 4.6% | 4.1% |
| Handlers, Equipment Cleaners, Helpers & Laborers | 6.4% | 4.3% | 3.9% |
| Total | 100.0% | 100.0% | 100.00% |

Source: 1990 U.S. Census, www.census.gov

29 Changes were made to the occupation classifications for the 2000 Census to reflect changes in the Standard Occupational Classification (SOC). Because of these changes, data from the 1990 and 2000 censuses are not directly comparable.



Exhibit 92: Percent of Employment by Occupation (2000)

| Occupation Category | Carroll County | Georgia | U.S. |
|---|----------------|---------|--------|
| Management, Business, & Financial Operations (not Farm) | 9.9% | 13.6% | 12.9% |
| Professional and Related | 16.3% | 18.7% | 20.2% |
| Sales | 11.1% | 11.6% | 11.2% |
| Office and Administrative Support | 14.2% | 15.1% | 15.4% |
| Personal Care & Services | 2.6% | 2.5% | 2.8% |
| Protective Services | 2.0% | 2.0% | 2.0% |
| Service Occupations (not Protective & Personal Care) | 9.4% | 9.0% | 10.1% |
| Farming, Fishing and Forestry | 0.6% | 1.0% | 1.3% |
| Construction, Extraction, & Maintenance | 14.1% | 10.8% | 9.4% |
| Production | 11.9% | 9.0% | 8.5% |
| Transportation & Material Moving | 7.9% | 6.6% | 6.1% |
| Total | 100.0% | 100.0% | 100.0% |

Source: 2000 U.S. Census, www.census.gov

Non-farm employment comprises 98% of all employees in Carroll County while only 2% of the labor force is engaged in farming and agricultural related pursuits. The manufacturing sector, which employed 45.7% of the workforce in 1970, continues to be the largest employment base with 27.2% in 1997. Employment has slowly shifted from the manufacturing sector to the services (21.6%) and retail trade (18.6%) sectors. This has been a nationwide trend, although Carroll County has been making the transition more slowly than in other parts of the country. Private non-farm employment from 1990 to 1999 increased by only 4.8% as opposed to the State of Georgia, which increased 34.6%. Carroll Tomorrow and other economic development interests have focused on diversifying the economy by attracting high wage employers from multiple employment sectors to avoid high unemployment when a specific industry is negatively affected by economic shifts.

Exhibits 77, 78 and 79 illustrate declining labor force participation for men and women in Carroll County and Georgia between 1990 and 2000 and declining unemployment rates for the County, region, State and nation. Between the years 2000 and 2002 the civilian labor force increased from 45,100 to 46,580, while total employment increased more modestly from 43,230 to 43,930. This resulted in increased unemployment from 1,870 to 2,650 (from an unemployment rate of 4.2% to 5.7%).



Exhibit 93: Employment Status (1990)

| Category | Carroll County | Georgia | United States |
|--------------------------------|-----------------------|----------------|----------------------|
| Total Males and Females | | | |
| In Labor Force | 66.19% | 67.89% | 65.28% |
| Civilian Labor Force | 66.13% | 66.41% | 64.39% |
| Civilian Employed | 62.59% | 62.60% | 60.34% |
| Civilian Unemployed | 3.54% | 3.80% | 4.05% |
| In Armed Forces | 0.06% | 1.48% | 0.89% |
| Not in Labor Force | 33.81% | 32.11% | 34.72% |
| Total Males | | | |
| Male In Labor Force | 75.06% | 76.65% | 74.48% |
| Male Civilian Labor Force | 74.99% | 73.87% | 72.82% |
| Male Civilian Employed | 71.77% | 70.07% | 68.18% |
| Male Civilian Unemployed | 3.22% | 3.80% | 4.63% |
| Male In Armed Forces | 0.07% | 2.78% | 1.66% |
| Male Not in Labor Force | 24.94% | 23.35% | 25.52% |
| Total Females | | | |
| Female In Labor Force | 58.18% | 59.88% | 56.79% |
| Female Civilian Labor Force | 58.13% | 59.59% | 56.60% |
| Female Civilian Employed | 54.29% | 55.78% | 53.10% |
| Female Civilian Unemployed | 3.84% | 3.81% | 3.51% |
| Female In Armed Forces | 0.05% | 0.29% | 0.19% |
| Female Not in Labor Force | 41.82% | 40.12% | 43.21% |

Source: 1990 U.S. Census, www.census.gov



Exhibit 94: Employment Status (2000)

| Category | Carroll County | Georgia | U.S. |
|--------------------------------|----------------|---------|-------|
| Total Males and Females | | | |
| In Labor Force | 63.60% | 66.10% | 63.9% |
| Civilian Labor Force | 63.50% | 65.00% | 63.4% |
| Civilian Employed | 60.50% | 61.40% | 59.7% |
| Civilian Unemployed | 3.10% | 3.60% | 3.7% |
| In Armed Forces | 0.10% | 1.10% | 0.5% |
| Not in Labor Force | 36.40% | 33.90% | 36.1% |
| Total Males | | | |
| Male In Labor Force | 71.45% | 73.11% | 70.7% |
| Male Civilian Labor Force | 71.33% | 71.20% | 69.8% |
| Male Civilian Employed | 68.47% | 1.91% | 65.8% |
| Male Civilian Unemployed | 2.85% | 3.55% | 4.0% |
| Male In Armed Forces | 0.18% | 1.91% | 0.9% |
| Male Not in Labor Force | 28.55% | 26.89% | 29.3% |
| Total Females | | | |
| Female In Labor Force | 56.40% | 59.40% | 57.5% |
| Female Civilian Labor Force | 56.40% | 59.20% | 57.4% |
| Female Civilian Employed | 53.20% | 55.60% | 54.0% |
| Female Civilian Unemployed | 3.20% | 3.60% | 3.3% |
| Female In Armed Forces | 0.00% | 0.20% | 0.1% |
| Female Not in Labor Force | 43.60% | 40.60% | 42.5% |

Source: 2000 U.S. Census, www.census.gov

Exhibit 95: Annual Unemployment Rates (1900-2000)

| Year | Carroll | Coweta | Douglas | Fulton | Haralson | Heard | Cleburne* | Randolph* | Georgia | United States |
|------|---------|--------|---------|--------|----------|-------|-----------|-----------|---------|---------------|
| 1990 | 6.2% | 5.9% | 4.7% | 5.7% | 7.1% | 5.3% | 6.6% | 7.8% | 5.5% | 5.6% |
| 1991 | 5.6% | 5.5% | 4.7% | 5.3% | 9.6% | 7.2% | 7.2% | 9.7% | 5.0% | 6.8% |
| 1992 | 7.3% | 7.3% | 6.1% | 7.4% | 12.8% | 9.4% | 6.4% | 7.5% | 7.0% | 7.5% |
| 1993 | 5.9% | 5.3% | 4.6% | 6.4% | 9.5% | 7.4% | 6.9% | 9.7% | 5.8% | 6.9% |
| 1994 | 4.7% | 4.2% | 4.0% | 5.8% | 6.1% | 6.9% | 4.2% | 6.7% | 5.2% | 6.1% |
| 1995 | 5.2% | 4.1% | 3.6% | 5.4% | 7.9% | 5.9% | 5.9% | 8.1% | 4.9% | 5.6% |
| 1996 | 5.1% | 3.8% | 3.2% | 5.0% | 8.0% | 8.2% | 4.3% | 5.9% | 4.6% | 5.4% |
| 1997 | 5.0% | 4.0% | 3.1% | 4.6% | 6.9% | 6.3% | 3.6% | 4.7% | 4.5% | 4.9% |
| 1998 | 4.5% | 3.3% | 3.0% | 4.1% | 6.0% | 5.1% | 3.6% | 5.0% | 4.2% | 4.5% |
| 1999 | 4.5% | 2.8% | 2.9% | 3.9% | 4.9% | 6.6% | 4.3% | 6.0% | 4.0% | 4.2% |
| 2000 | 4.1% | 3.4% | 2.7% | 3.7% | 4.4% | 5.5% | 3.5% | 5.5% | 3.7% | 4.0% |

Source: Georgia Department of Community Affairs (www.georgiaplanning.com) & Real Estate Center – Texas A&M University (recenter.tamu.edu).

* These counties are located in Alabama

The County's concentration of jobs in the manufacturing sector suggests that the existing labor pool should have technical training rather than college degrees for the type of jobs available. The recent rise in education levels of Carroll County's citizens and commuting patterns suggest that there is a professional labor force residing in Carroll County that is occupying jobs elsewhere in the region. To what extent the enhancement of professional workers will lure companies that offer high paying professional jobs is not clear. Carroll County's transportation access, proximity to the Atlanta



metropolitan area, post-secondary education opportunities and affordable cost of living are powerful assets with which to recruit professional employers and clean industry.

Major employers are listed in **Exhibit 96**. Although three of the four organizations that hire 1,000 employees or more are from non-manufacturing sectors, there are at least 12 industrial operations that employ between 100 and 700 people.

Exhibit 96: Carroll County Major Employers

| Institution | Number of Employees |
|-----------------------------------|---------------------|
| Tanner Medical Center | 1,700 |
| Carroll County School System | 1,700 |
| Southwire Company | 1,600 |
| University of West Georgia | 1,000 |
| Gold Kist | 700 |
| Carrollton City School System | 532 |
| Carroll County | 527 |
| Carrollton City | 411 |
| OFS Brightwave | 400 |
| West Central Technical College | 378 |
| Trintex | 316 |
| Fresh Advantage | 300 |
| Flowers Baking Co. | 300 |
| Printpack, Inc. | 216 |
| Sugar Foods | 180 |
| Arch Aluminum | 150 |
| King Provision | 145 |
| Bremen Bowdon/Lamar Manufacturing | 140 |
| Sony Music | 135 |
| Wal-mart.com | 125 |
| City of Villa Rica | 123 |
| IKKA Technology | 100 |
| Janus International | 100 |

Source: Carroll Tomorrow

Carroll County residents also work outside Carroll County. **Exhibit 97** shows the place of employment for all County residents over the age of sixteen. While a majority work within the Atlanta Metropolitan Statistical Area, some work outside that area and 473 workers, just over one percent, work outside the State of Georgia, probably in Alabama. In order to reach their places of employment, a majority of workers drove, either alone or in a carpool, as shown in **Exhibit 98**.



Exhibit 97: Place of Employment, 2000

| Place of Employment | Workers | |
|--------------------------|---------|------------|
| | Number | Percentage |
| Carroll County | 24,611 | 61.9% |
| Atlanta | 1,839 | 4.6% |
| Remainder of Atlanta MSA | 11,018 | 27.7% |
| Outside the Atlanta MSA | 2,262 | 5.7% |

Source: 2000 U.S. Census, www.census.gov

Exhibit 98: Transportation to Work, 2000

| Means of Transportation | Workers | |
|-------------------------|---------|------------|
| | Number | Percentage |
| Drove Alone | 31,384 | 79.0% |
| Carpooled | 6,168 | 15.5% |
| Public Transportation | 111 | 0.3% |
| Motorcycle | 61 | 0.2% |
| Bicycle | 67 | 0.2% |
| Walked | 738 | 1.9% |
| Other Means | 290 | 0.7% |
| Worked At Home | 911 | 2.3% |

Source: 2000 U.S. Census, www.census.gov

D. LOCAL ECONOMIC ACTIVITY

1. Agriculture and Forestry

While the topography and lack of prime crop raising soils limit the County's production of crops, substantial dairy, livestock and poultry industries contribute significantly to the local economy. Although farm employment is low, agriculture contributes approximately \$40,000,000 annually to the local economy.³⁰ As of 1997, there were 702 active farms in Carroll County encompassing 77,944 acres or 24.3% of the county's land area. Total market value of agriculture products sold in 1997 was \$90,272,000 with 96.4% of the value being generated by livestock and poultry operations. Carroll County ranked first in beef production and fifth in broiler production throughout the State.

The Cotton Mill Farmers' Market in Carrollton provides local and regional farmers a venue to sell their wares directly to consumers. Direct marketing techniques such as farmers' markets, mail order, subscription farms, internet sales and on-site retail sales provide opportunities for small agricultural operations to capture a larger portion of the consumer food dollar by circumventing processors, packers, distributors and large retailers.

³⁰ Carroll County Economic Profile. Carroll County Chamber of Commerce. No Date.



Carroll County has 185,900 acres of forestland covering 58% of the land area. As growth pressures have increased, the pressure for development of timberlands also has increased.

Farming, forestry and animal husbandry activities are vital land uses that should not be viewed as mere holding zones for future urbanization or suburban development. While agricultural land uses do not contribute significantly to tax revenues per acre, they consume low levels of public services and typically generate greater revenues than costs. Studies throughout the state and nation reveal that agricultural land uses are net contributors to County fiscal stability, while low density residential development typically generates greater costs than revenues. The environmental and aesthetic benefits of agriculture and forestry land are difficult to quantify in monetary terms, yet are known economic development assets and contribute to the rural character and overall quality of life.

In response to the continued loss of agriculture, forestry and open space, an ad hoc Agriculture Preservation Committee consisting of American Farmland Trust, Carroll County Agriculture Extension, farmers and other agriculture interest groups was formed. This committee has been working closely with the Coordinated Planning Committee to ensure that the Comprehensive Plan update adequately addresses agricultural issues and provides sufficient policy guidance to establish a viable agriculture protection program. To this end, the committee is building grassroots support for the use of conservation easements and the establishment of a transferable development rights program within the County. Arising from this planning effort, it is anticipated that an Agricultural Advisory Board will serve a vital role in the land preservation decision-making process of the County. In addition, there are a number of efforts in neighboring jurisdictions to preserve land for agriculture, forestry, environmental protection and recreational purposes.

2. Commercial and Office Development Trends

As the local economy continues its slow shift to a service and retail based economy, additional office and retail space will be needed.³¹ Based on the existing population, there should be a significant demand for day-care and preschool facilities that enable single parents to participate in the workforce. If continued, the recent trend in health and business services employment will increase the need for office space. Health care office space tends to congregate near regional health centers and where a significant patient population exists, for instance near elderly care facilities.

3. Industrial Development Patterns

Although the manufacturing sector's dominance of the local economy is dwindling, it still remains the largest employment sector. The apparel and textiles industry has been hard hit by NAFTA and international markets. The food, rubber and plastics products gained employment. With easy access to rail and highway, the I-20 corridor between Villa Rica and Temple may be attractive as a transportation and distribution center provided urban level services are provided. As noted by Market Street Services, Inc., "There is an adequate supply of industrial land in the municipalities, but none in the unincorporated areas due to a lack of sewer." However, available sites within incorporated and unincorporated Carroll County are generally 20 acres or less, which severely limits the prospects for large industrial operations.

³¹ Carrollton's existing inventory of empty retail space should significantly reduce demands for new retail space.



Through the Carroll Tomorrow economic development program, a number of potential “target business clusters” were identified, which would benefit from Carroll County’s educational resources, existing economic structure, transportation options and proximity to the Atlanta metropolitan area. Among the identified businesses are software and internet services, warehousing and goods distribution, transportation equipment manufacturing and distribution, corporate transaction services, health care, and value-added manufacturing opportunities.

E. ECONOMIC DEVELOPMENT RESOURCES

Changes within the local economy are largely influenced by events external to the County, which may originate from regional, national and international events. However, recognition of the profound impacts of changes in the economy on the local quality of life has mobilized business and governmental leaders to develop and implement strategies to enhance and stabilize the local economic environment. Consequently, the citizens of Carroll County have created Chambers of Commerce, which seek to promote economic stability and diversification through various fiscal incentives, planning efforts, labor force enhancement, marketing and other activities.

In recent years, business, community and governmental leaders of Carroll County have been collaborating to develop a unified economic development vision and strategy. Through Carroll Tomorrow, these community stakeholders have developed a series of detailed studies of local strengths, weaknesses and opportunities that culminated into the Carroll Tomorrow – Economic Development Strategy. The goals, objectives and actions contained within this document have been incorporated into this plan.

1. Economic Development Agencies

The Carroll County Chamber of Commerce provides a wide range of economic development services including: business directories, community information dispersion, business education, tourism and convention planning, and marketing assistance. On July 16, 2002, the Chamber’s new 2,100 sq. ft. Stone Family Center for Economic Development facility was officially dedicated. The Center houses the Carroll County Economic Development Foundation, commonly known as Carroll Tomorrow.

Carroll Tomorrow, which operates with pledged revenues on a 4-year cycle, is a broad-based community effort focused on community planning, developing an entrepreneurial community, business recruiting, retention and expansion assistance. This cooperative effort between business, citizen, education and other community leaders developed the Carroll Tomorrow Economic Development Strategy, which establishes specific goals and actions to enhance the economic condition of the County. A profile of Target Business Clusters asserts that significant opportunities for Carroll County exist in six business sectors: software and internet services, distribution, transportation equipment, corporate transaction services, health care and value-added manufacturing. In addition to economic development, Carroll Tomorrow provides grass roots support and advocacy to enhance and preserve the community’s quality of life, workforce and education, infrastructure, community leadership, community design and other planning functions.

The Development Authority of Carroll County is a duly created body pursuant to the Development Authorities Law (O.C.G.A. § 36-62-1 et seq., as amended). The Authority was created to develop and promote trade, commerce, industry, and employment opportunities for the public good and the general welfare of the citizens of Carroll County. The Authority has the power to acquire, sell, or



dispose of any real and personal property as part of any project, expend for promotion of industry and trade within its area of operations, to construct, acquire, own, repair and equip projects located on land owned or leased by the Authority and to issue revenue bonds and use the proceeds for the purpose of financing a variety of economic development projects.

Carrollton Payroll Development Authority was created to promote the development of jobs and payrolls in industry, agriculture, commerce, and natural resources and to coordinate development, promotion, and expansion of economic development. While the Authority’s name specifically references Carrollton, its activities cover the entire County. The Authority was created in 1962 by an amendment to the State constitution.

2. Existing Economic Development Programs

Economic development programs available to Carroll County businesses are offered by the Georgia Department of Community Affairs (DCA), the Carroll County Chamber of Commerce and local institutions. The DCA is responsible for state administration of many incentive programs as well as providing technical assistance in the area of economic development to local governments, development authorities, and private for-profit entities. **Exhibit 99** provides a brief description of available DCA programs.

Exhibit 99: DCA Economic Development Programs

| Program Title | Program Description |
|--|--|
| The Redevelopment Fund Program | The Redevelopment Fund provides flexible financial assistance to local governments to assist them in implementing challenging economic and community development projects that cannot be undertaken with existing public sector grant and loan programs. |
| Employment Incentive Program | The Employment Incentive Program is a Community Development and Block Grant funded grant program designed to support local government projects intended to facilitate and enhance job creation and/or retention, principally for persons of low and moderate income. |
| Downtown Development Revolving Loan Fund (DD RLF) | The Downtown Development Revolving Loan Fund is designed to assist non-entitlement cities and counties in implementing quality downtown development projects. Loans may be used for a variety of public or private projects that involve infrastructure improvements, real estate development or redevelopment, and, in some cases, purchase or lease of equipment. |
| Appalachian Region Business Development Revolving Loan Fund | This program is funded by the Appalachian Regional Commission and is designed to make loans to private businesses through local development authorities. The program benefits the 37-county area of Appalachian Georgia by funding projects that lead to job creation or retention. |
| Appalachian Regional Commission Economic Development Grant Program | This program is funded by the Appalachian Regional Commission and is designed to provide matching grant funds to eligible applicants in support of economic development projects. |
| Georgia Job Tax Credit Program | The Job Tax Credit Program provides a tax credit on Georgia income taxes for eligible businesses that create new jobs in counties or "less-developed" census tract areas. |
| Business Retention & Expansion Process | The Business Retention and Expansion Process provides a process for local governments, chambers and/or development authorities to survey existing industries and identify the perceptions and potential problems of private sector firms concerning issues like future plans, international trade, labor and manpower, local government services, energy requirements, and community linkages. |



| Program Title | Program Description |
|---|---|
| CDBG Loan Guarantee Program (Section 108 Program) | The CDBG Loan Guarantee Program (Section 108 Program) is an economic and community development-financing tool authorized under Section 108 of Title I of the Housing and Community Development Act of 1974, as amended. The program is a method of assisting non-entitlement local governments with certain unique and large-scale economic development projects that cannot proceed without the loan guarantee. |
| Regional Assistance Program (RAP) | The Regional Assistance Program (RAP) is a collaborative effort of DCA and GEFA to support multi-county and regional collaboration in economic development. The RAP program provides grants to local governments and local government authorities for multi-county activities important to regional economic development. |
| Bond Allocation Program | For businesses and individuals seeking long-term, low-interest rate financing for the construction or improvements of manufacturing facilities, single and multi-family housing projects, exempt financing is available both at the state and local level. DCA is responsible for implementing a system for allocating the use of private-activity bonds, as permitted by federal law, in order to further the economic development of the state, to further the provision of safe, sanitary, and affordable housing, and otherwise to further the purposes of the laws of the state which provide for the issuance of such bonds. |
| Regional Economic Assistance Projects (REAP) | Regional Economic Assistance Projects (REAP) provide a mechanism for local and state governments and the private sector to cooperate on large-scale tourism-related projects with multiple uses that will create jobs and enhance the local tax base. Upon meeting the requirements of the REAP statute and the REAP Rules, a developer of a certified REAP project may apply to the Georgia Department of Revenue for a state license for the sale of malt beverages, wine, or distilled spirits by the drink for consumption on the premises only. House Bill 1482, signed by the Governor on April 20, 2002, broadened the eligibility criteria for the REAP program. Effective July 10, 2002, the Department updated the REAP rules and application manual accordingly. |
| Georgia Main Street/Better Hometown Program | The Main Street/Better Hometown Program is a self-help community development program designed to improve a downtown's quality of life and is modeled on the Main Street Four Point Approach (TM) to downtown revitalization. The Main Street/Better Hometown Program focuses on economic development through downtown revitalization, historic preservation and restoring a sense of place. |
| Georgia Academy for Economic Development | The Academy is a consortium of public and private economic development organizations providing economic development training throughout Georgia. These professionals serve as the Academy's program leaders and resource experts. |

Source: Georgia Department of Community Affairs. Taken verbatim from <http://www.dca.state.ga.us/economic/index.html>

The Carroll County Chamber of Commerce offers a wide variety of advertising, networking, promotional and training programs including, but not limited to: business directories, visitor and relocation information, site location assistance, seminars, a small business resource center, long distance phone discounts and low cost employee insurance plans.

The Chamber's Burson Center, a 24,400 square foot mixed-use incubator, facilitates local entrepreneurship and small business development by providing a variety of counseling, training, mentoring, financing and networking services in an entrepreneur friendly environment. The center offers a high-tech, mixed-use space with customized, furnished offices for each tenant, meeting and



conference rooms, a reference library, a common break area and 5,000 square feet of warehousing/light manufacturing space.

The University of West Georgia has a couple of entrepreneurship and small business incubator projects. The UWG's Small Business Development Center and the Center for New Business Ventures offer management training and technical assistance to small business owners in the region.

3. Non-Residential Sites Available

The cities of Villa Rica, Bowdon and Carrollton have a total of four (4) industrial parks with over 160 acres available, which can meet short-term industrial land demands. However, there are few available sites encompassing at least 50 acres, which are sought by the County's targeted business sectors. Within the unincorporated areas of Carroll County, the number of sites suitable for non-residential development is severely limited, primarily due to a lack of sewer service.³² While the County has zoned areas such as the Highway 61 corridor for commercial development, lack of centralized sewer service has allowed only small-scale uses. Recent County policy changes to allow community wastewater systems theoretically open many areas to larger scale non-residential development. However, most major employers will continue to seek sites with centralized municipal services. In addition, there are limited existing vacant structures suitable for business relocation or expansion.

4. Work Force Development

The local level of educational attainment within Carroll County has been frequently cited as the primary challenge facing the community. Despite the fact that there are academic and technical schools in the County, many companies have expressed difficulty in hiring qualified employees for entry-level positions, which often requires new employees to attend extensive training.³³ Retaining graduates, training the existing labor force and improving public school student performance have been identified as strategies to enhance the skills of the local populace.

The West Georgia Technical College (WGTC) is the primary source of workforce training in the County. Specialized workforce training and related services are provided through the Quick Start program, which is administered by the Georgia Department of Technical and Adult Education. This program offers training in numerous subject areas including, but not limited to: computer training, productivity enhancement, leadership, customer service and environmental safety.

F. ECONOMIC GROWTH PROJECTIONS

The conservative employment growth projections in this Plan Element are insufficient to maintain the existing jobs-housing balance. To increase employment opportunities, Carroll Tomorrow and this Plan are promoting a coordinated economic development program that includes the following emphases:

- Coordinated development of a large-scale business park by all local jurisdictions in the County using public and private investments;
- Ongoing work-force development efforts with WGTC and UWG; and

32 Carroll Tomorrow, Carroll County Community Capacity Assessment, October 13, 1999, pg. 16.

33 Carroll Tomorrow, Carroll County Profile of Target Business Clusters, March 6, 2000, pg. 15.



- Active participation in and use of available economic development programs (see **Exhibit 99**).