



Carroll County, Georgia

Comprehensive Plan Update 2018

IV. Local Economy

A. Economic Base³⁷

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 4-1** shows that the degree of specialization in farming increased from 1990 to 2010 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 4-2**).

³⁷ The data presented in this chapter has been verified by the local Chamber of Commerce as in line with current trends. It is recommended by the Chamber that a new study is conducted for the next Comprehensive Plan Update in 2028.



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-1: Farm 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	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

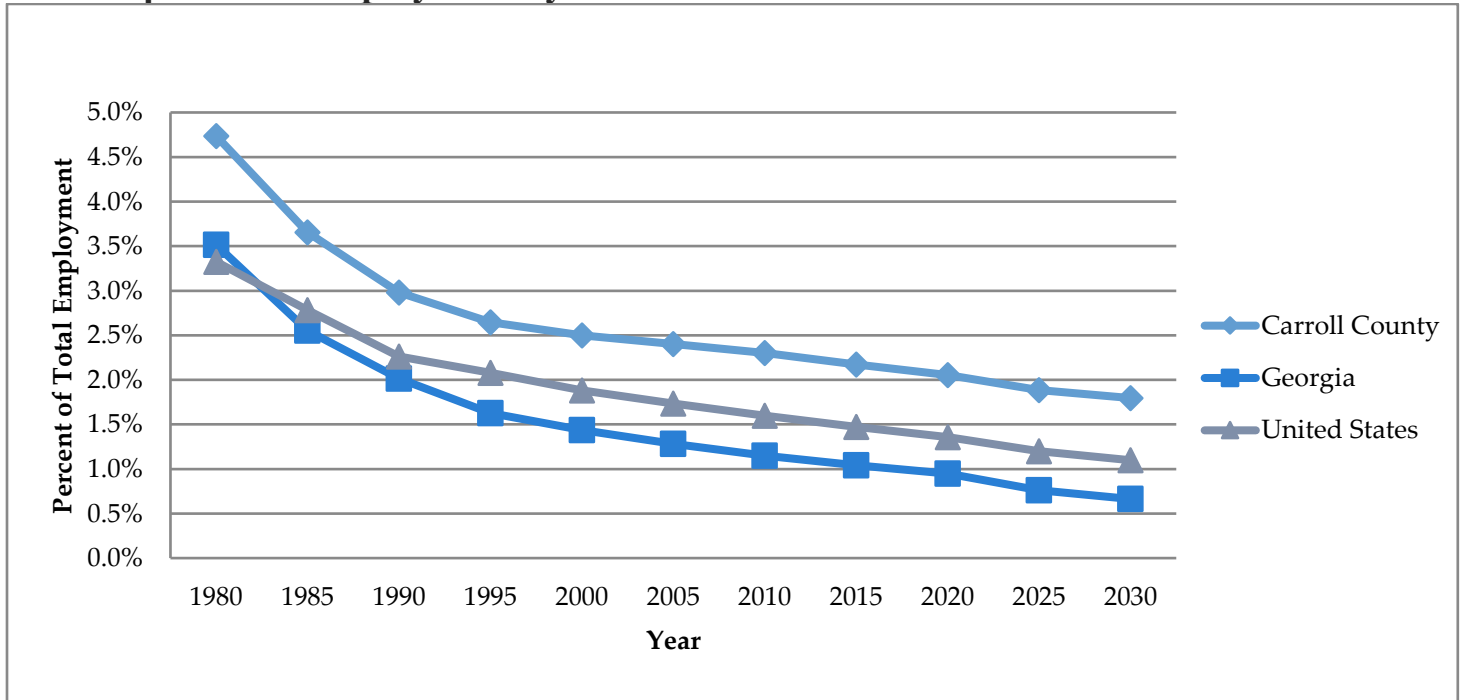
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-2: Farm Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-3: 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: Bureau of Economic Analysis; Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

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 4-4**). **Exhibit 4-5** 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 4-4: 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

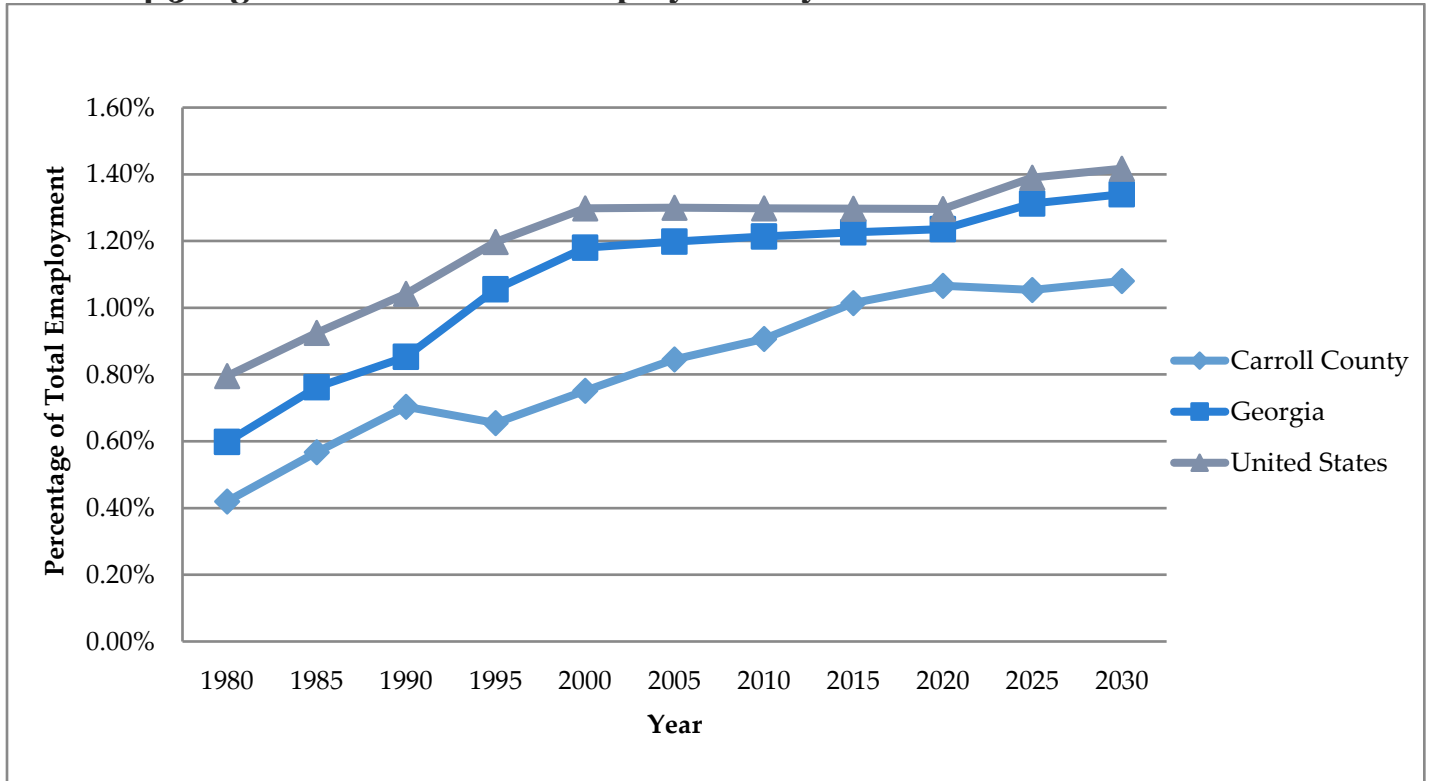
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-5: Agricultural Services Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-6: 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: Bureau of Economic Analysis; Carroll Tomorrow

3. Mining

Mining activities are highly mechanized and employ small numbers of people. Location quotients in **Exhibit 4-7** 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 4-8**).



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-7: 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

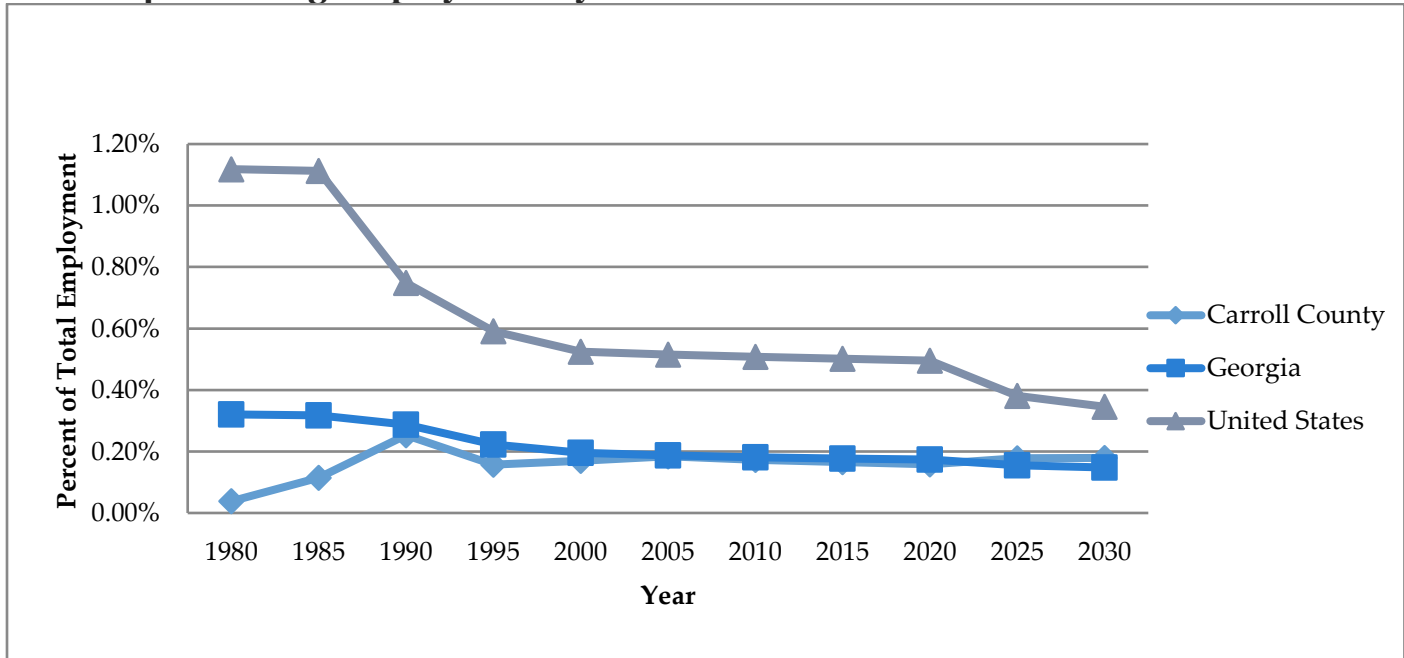
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-8: Mining Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-9: 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: Bureau of Economic Analysis; Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

4. Construction

Georgia and Carroll County have slight specialization in the construction industry demonstrated by the location quotients in **Exhibit 4-10**. 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 4-11**).

Exhibit 4-10: 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

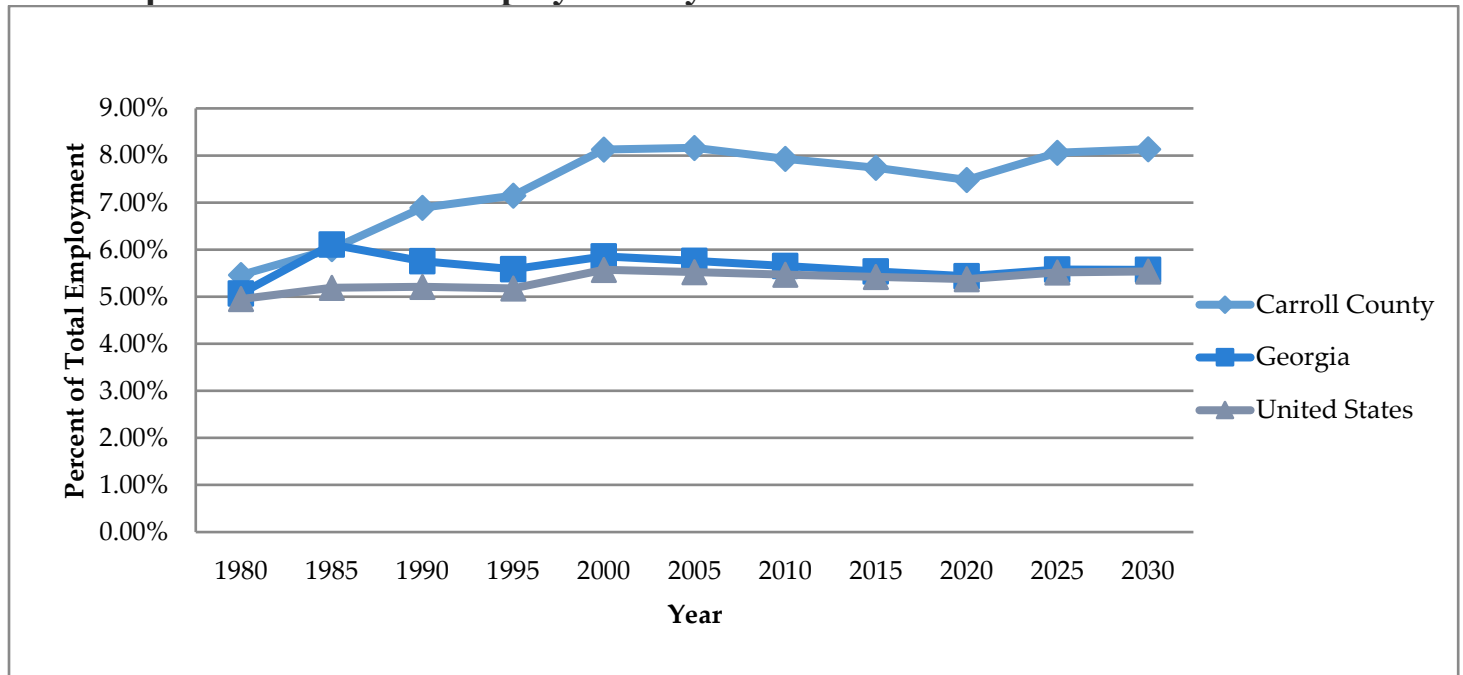
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-11: Construction Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-12: 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: Carroll Tomorrow

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 4-13**). 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 4-14** 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 4-13: 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



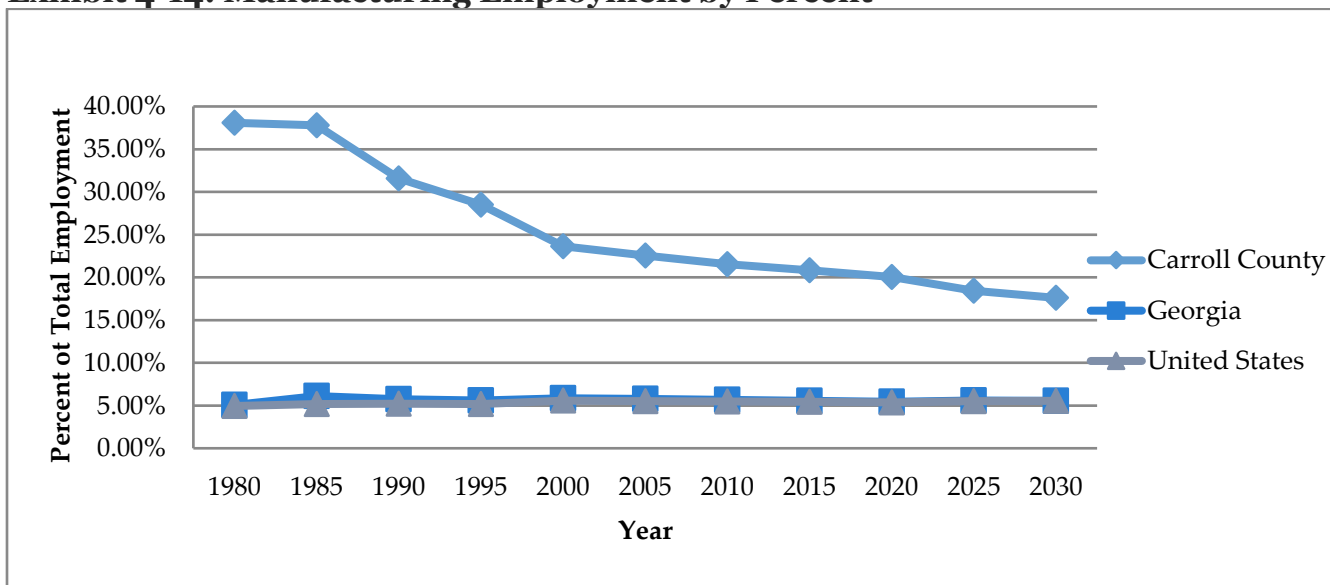
Carroll County, Georgia

Comprehensive Plan Update 2018

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: Carroll Tomorrow

Exhibit 4-14: Manufacturing Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-15: 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



Carroll County, Georgia

Comprehensive Plan Update 2018

2015	\$519,157	\$1774,315	\$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: Bureau of Economic Analysis; Carroll Tomorrow

6. Transportation, Communications & Utilities

Within the nation, Georgia has a degree of specialization in the transportation, communications and utilities industries (**Exhibit 4-16**). Carroll County does not exhibit specialization in these industries (**Exhibit 4-17**).

Exhibit 4-16: 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

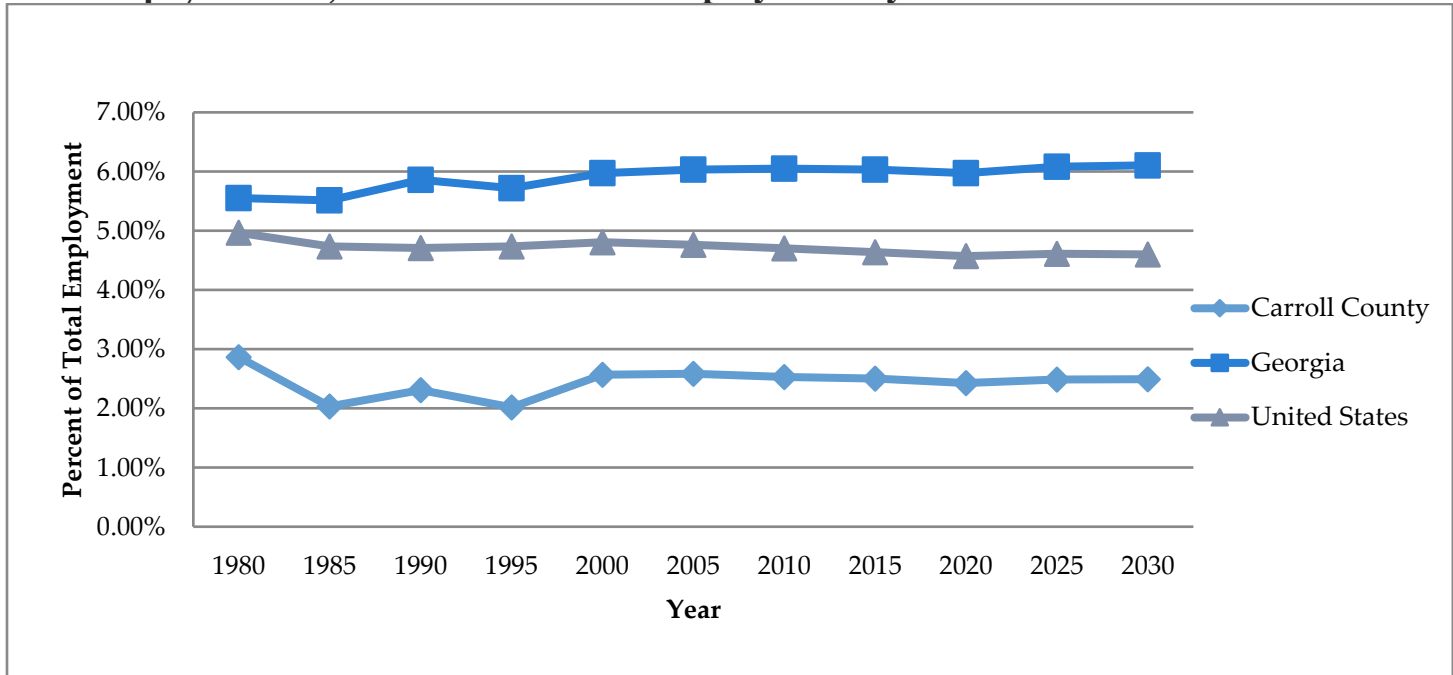
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-17: Trans., Comm. & Utilities Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-18: 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: Bureau of Economic Analysis; Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

7. Wholesale Trade

Exhibit 4-19 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 4-20** illustrates that only modest growth in this sector is projected for Carroll County.

Exhibit 4-19: 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

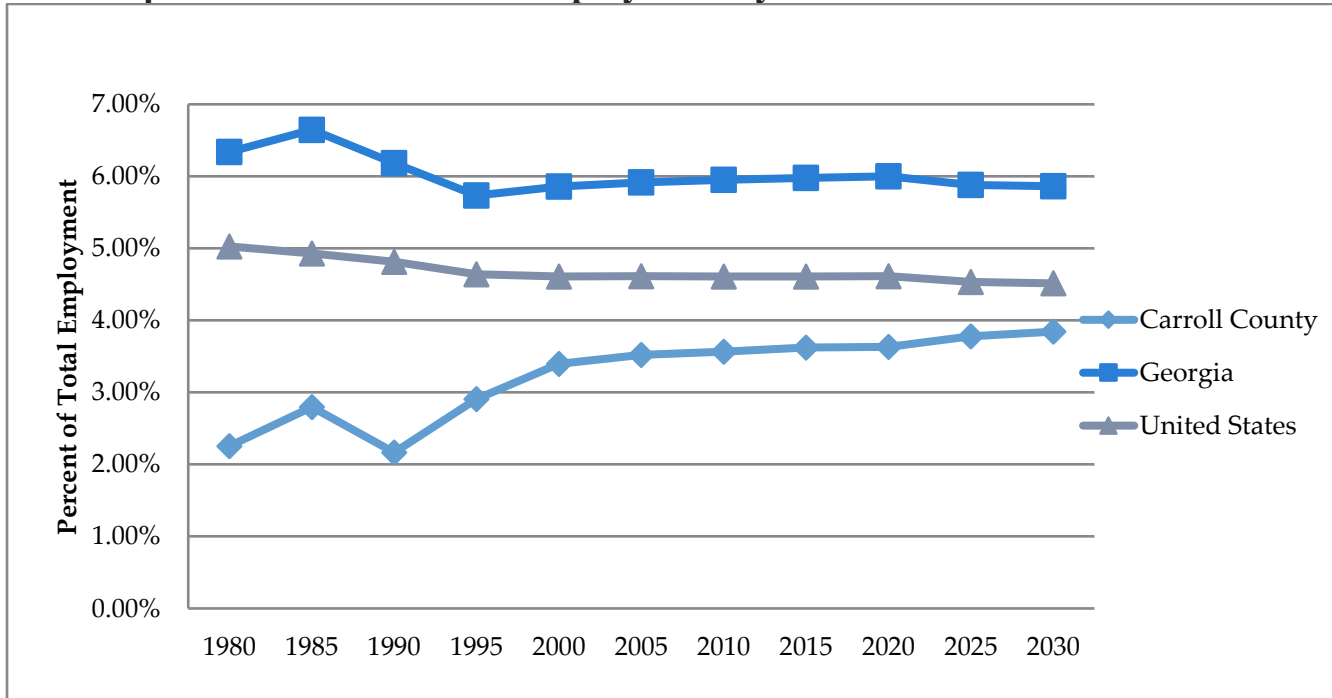
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-20: Wholesale Trade Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-21: 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: Bureau of Economic Analysis; Carroll Tomorrow

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 4-22**). 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 4-23**).



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-22: 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

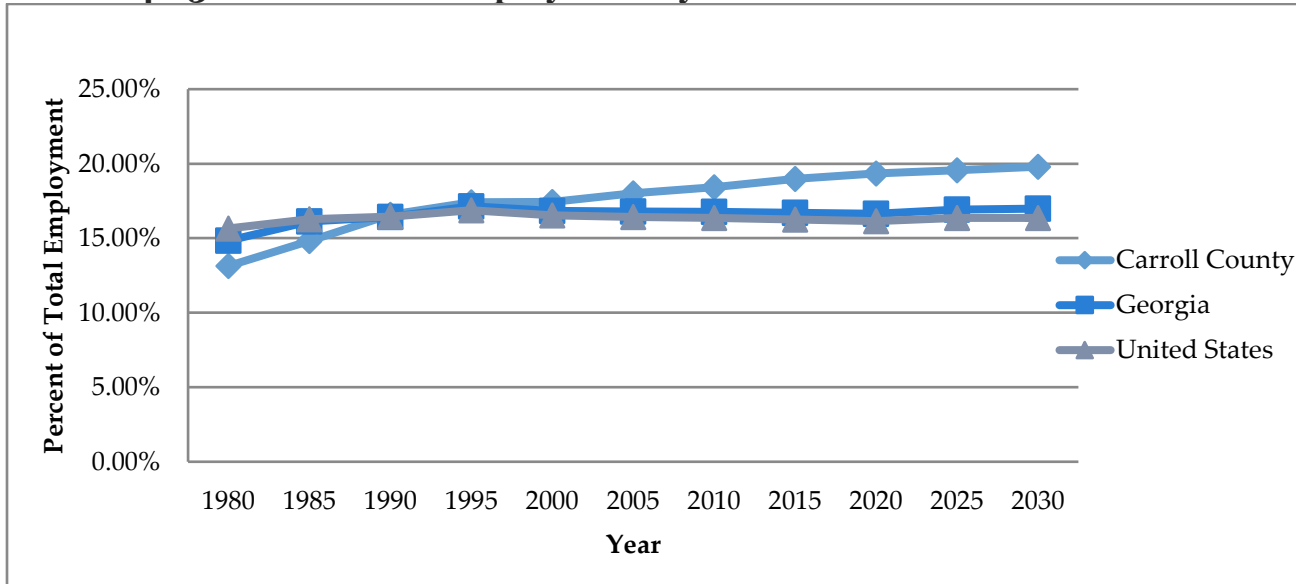
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-23: Retail Trade Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-24: 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: Bureau of Economic Analysis; Carroll Tomorrow

9. Finance, Insurance & Real Estate (FIRE)

The FIRE sector does not represent a specialization for either the County or Georgia (**Exhibit 4-25**). Historic, current and projected location quotients for Carroll County range between 0.608 and 0.725



Carroll County, Georgia

Comprehensive Plan Update 2018

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 4-26**).

Exhibit 4-25: 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

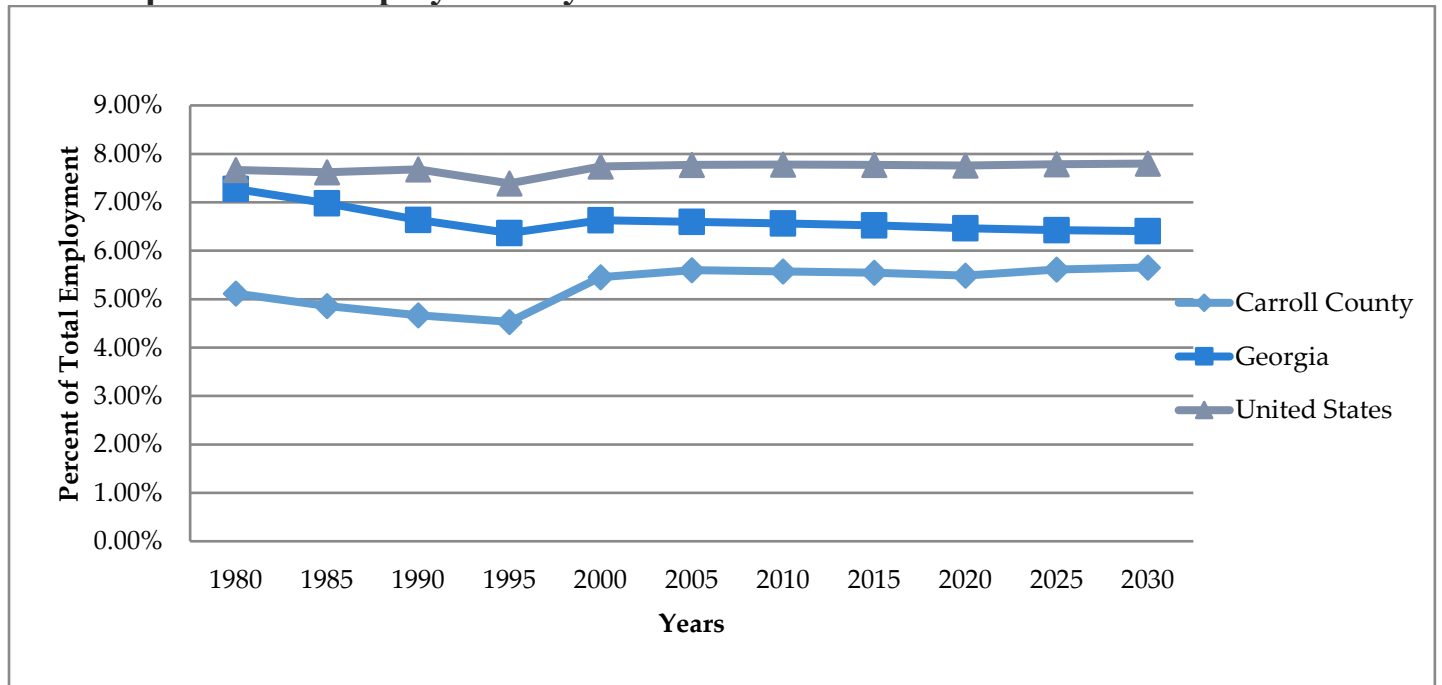
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-26: FIRE Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-27: 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: Bureau of Economic Analysis; Carroll Tomorrow

10. Service

According to location quotient analysis of service sector employment (**Exhibit 4-28**), 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 4-29**). Service employment in Carroll County is expected to comprise 26% of total employment by 2030.

Exhibit 4-28: 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



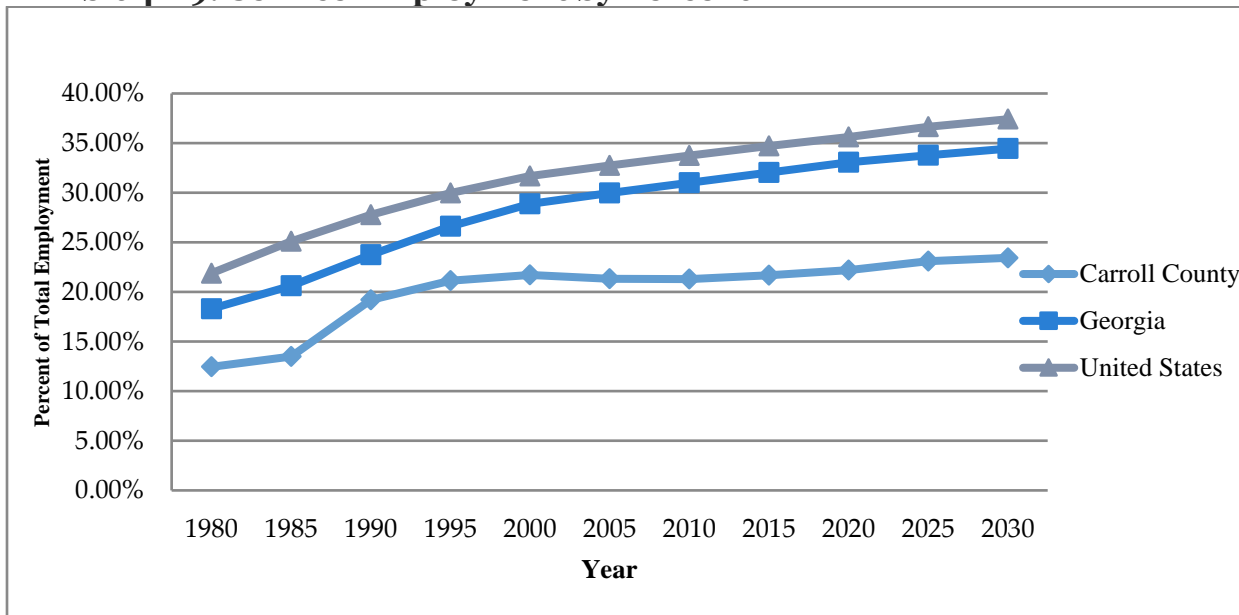
Carroll County, Georgia

Comprehensive Plan Update 2018

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: Carroll Tomorrow

Exhibit 4-29: Service Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-30: 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: Bureau of Economic Analysis; Carroll Tomorrow

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 4-31**). 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 4-32** 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.



Carroll County, Georgia

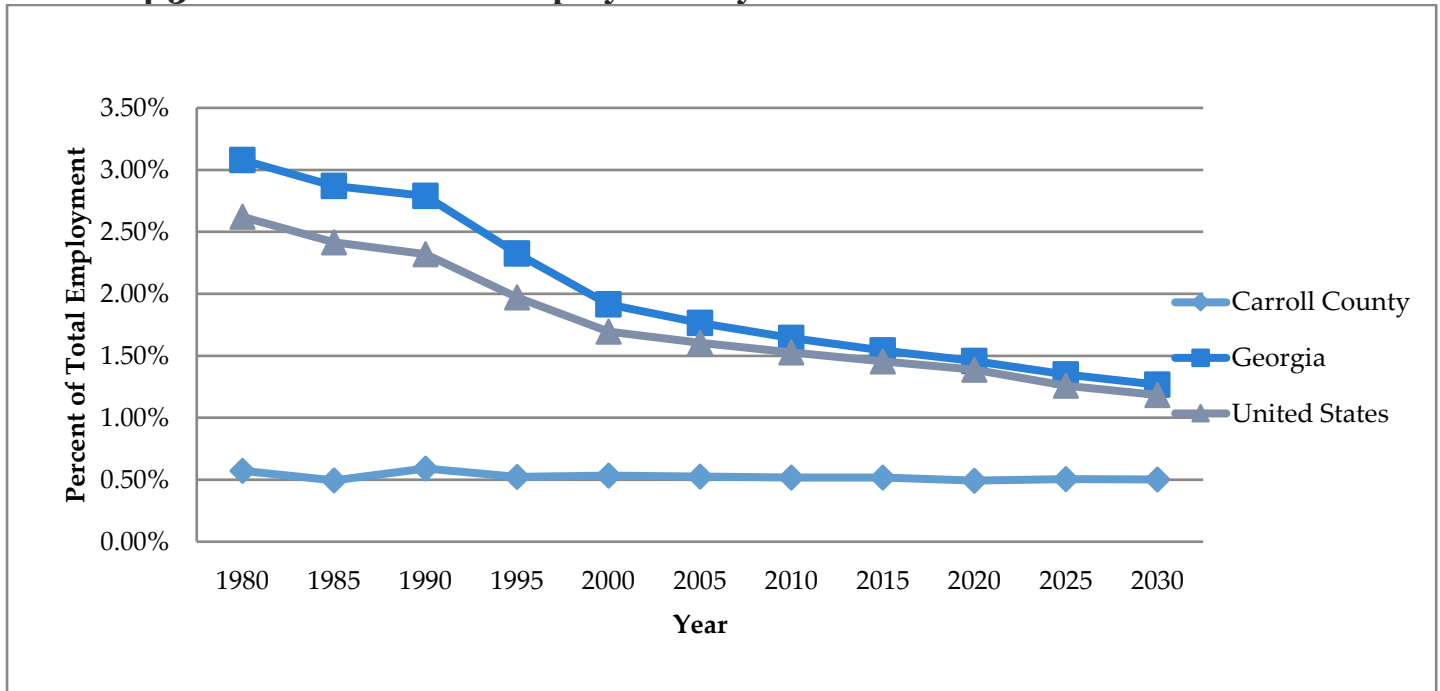
Comprehensive Plan Update 2018

Exhibit 4-31: 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: Carroll Tomorrow

Exhibit 4-32: Federal Civilian Employment by Percent



Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-33: 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: Bureau of Economic Analysis; Carroll Tomorrow

12. Federal Military Government

Georgia has a slight specialization in military operations while Carroll County has relatively little (**Exhibit 4-34**). 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 4-35**).



Carroll County, Georgia

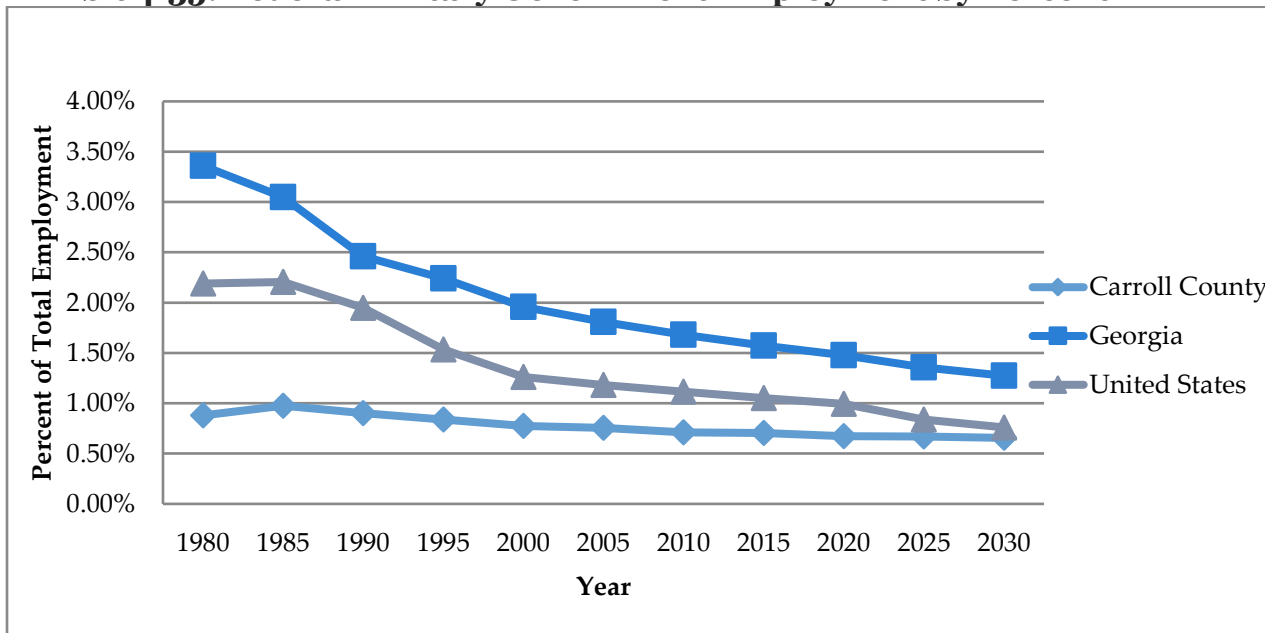
Comprehensive Plan Update 2018

Exhibit 4-34: 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	70,986	0.796	94,775	6,984,276	1.617	1,881,888	224,260,403
2030	499	76,157	0.863	94,859	7,447,829	1.675	1,797,686	236,478,674

Source: Carroll Tomorrow

Exhibit 4-35: Federal Military Government Employment by Percent





Carroll County, Georgia

Comprehensive Plan Update 2018

Source: Carroll Tomorrow

Exhibit 4-36: 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: Bureau of Economic Analysis; Carroll Tomorrow

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 4-37**). 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 4-38**).



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-37: 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		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

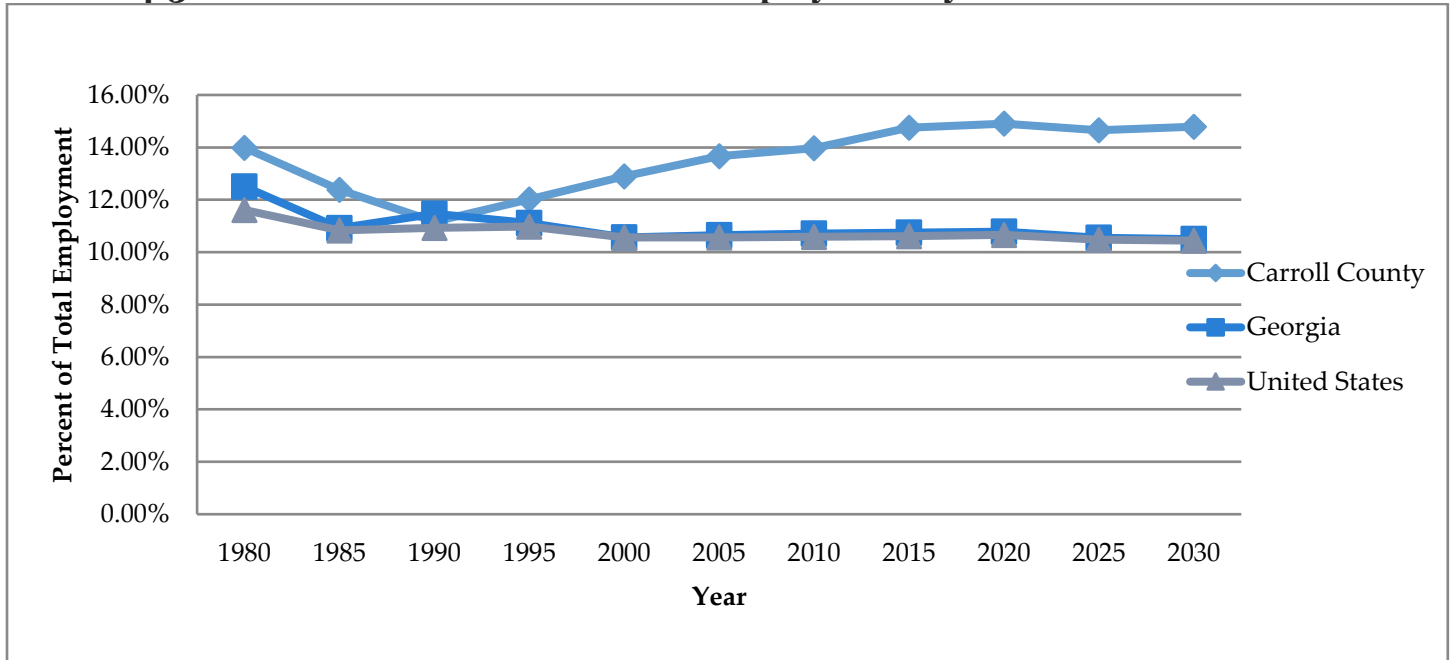
Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-38: State and Local Government Employment by Percent



Source: Carroll Tomorrow

Exhibit 4-39: 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: Bureau of Economic Analysis; Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018

B. Income and Wages

Exhibit 4-40 below demonstrates average weekly wages by sector from 1999 to 2017. The Carroll County labor force in 2017 includes 55,039 employees, of which 2,767 (5%) were unemployed at the end of 2017.

Exhibit 4-40: Carroll County Average Weekly Wage Rates by Sector (1990-2017)

Sector	1990	1995	2000	2005	2010	2015	2017
All Industries	\$353	\$367		\$804		\$758	\$813
Agriculture, Forestry, Fishing	\$242	\$243				\$631	\$696
Mining	*	*	*	*	*	*	*
Construction	\$388	\$407				\$944	\$1,031
Manufacturing	\$389	\$401				\$893	\$985
Transportation, Comm, Utilities	\$519	\$520				\$831	\$843
Wholesale Trade	\$423	\$447				\$914	\$992
Retail Trade	\$203	\$213				\$483	\$488
Financial, Insurance & Real Estate	\$419	\$430				\$750	\$841
Services	\$333	\$355				\$700	\$740
Federal Government	*	*	*	*	*	\$1,042	\$1,025
State Government	*	*	*	*	*	\$894	*
Local Government	*	*	*	*	*	\$715	\$750

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. 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 4-41: Total Number of Jobs (2007-2014)

2000	31,908
2007	39,933
2010	35,295
2012	37,098
2014	38,409



Carroll County, Georgia

Comprehensive Plan Update 2018

2016	53,600
------	--------

Source: Georgia Department of Labor

Exhibit 4-42: 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%



Carroll County, Georgia

Comprehensive Plan Update 2018

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%



Carroll County, Georgia

Comprehensive Plan Update 2018

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: U.S. Census Bureau

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 4-43** and **Exhibit 4-44** compare the percentage of the labor force by occupation for Carroll County, Georgia, and the U.S.³⁸ 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 4-43: Percent of Employment by Occupation (2010)

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%

38 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.



Carroll County, Georgia

Comprehensive Plan Update 2018

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: U.S. Census

Exhibit 4-44: Percent of Employment by Occupation (2010)

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: U.S. Census



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-45: Percent of Employment by Occupation (2016)

Occupation Category	Carroll County	Georgia	U.S.
Management, Business, Science, and Arts Occupations	26.4%	36.2%	37%
Service Occupations	18.5%	16.8%	18.1%
Sales and Office Occupations	23.1%	24.6%	23.8%
Natural Resources, Construction and Maintenance Operations	11.9%	9.1%	8.9%
Production, Transportation, and Material Moving Occupations	20.1%	13.2%	12.2%
Total	100.0%	100.0%	100.0%

Source: 2012-2016 American Community Survey

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. Although the groupings are slightly different for 2016, Carroll falls behind Georgia and the United States in professional jobs and remains ahead in production jobs.

Exhibit 4-46: 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%



Carroll County, Georgia

Comprehensive Plan Update 2018

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%
2005	5.5%									
2010	11.7%									
2015	6.7%									
2017	5.0%									

Source: Georgia Department of Community Affairs, Georgia Planning Association)

* 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 4-47**. Although three of the five organizations that hire 1,000 employees or more are from non-manufacturing sectors, there are at least 13 industrial operations that employ over 200 people.



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-47: Carroll County Major Employers

Institution	Number of Employees
Southwire	3,700
Tanner Health System	2,800
Carroll County School System	1,800
Decostar/Magna	1,350
University of West Georgia	1,350
Pilgrim's Pride	750
Carroll County Government	650
Greenway Health	600
Carrollton City School System	575
Printpack, Inc.	550
Flowers Baking Co.	525
Bremen Bowdon Investment	500
Sugar Foods	390
Janus International	360
Wal-mart.com	350
OFS Brightwave	350
Carrollton City	308
Colorado Premium	300
Aubrey Silvey	250
Die Tech	230

Source: Carroll Tomorrow



Carroll County, Georgia

Comprehensive Plan Update 2018



Carroll County residents also work outside Carroll County. **Exhibit 4-48 and 4-49** shows the place of employment for all County residents over the age of sixteen. Carroll continues to have a high number of workers who reside in the county at 61.9%. In order to reach their places of employment, a majority of workers drove, either alone or in a carpool, as shown in **Exhibit 4-50 and 4-51**. During the last 10-year period, more workers have worked from home, a trend that is likely

to continue.

Exhibit 4-48: Place of Employment, 2010

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: U.S. Census



Carroll County, Georgia

Comprehensive Plan Update 2018

Exhibit 4-49: Place of Employment, 2012-2016

Place of Employment	Workers	
	Number	Percentage
Carroll County	29,416	61.6%
Outside County of Residence	17,717	37.1%
Outside State of Residence	621	1.3%

Source: 2012-2016 American Community Survey

Exhibit 4-50: Transportation to Work, 2010

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: U.S. Census



Exhibit 4-51: Transportation to Work, 2012-2016

Means of Transportation	Workers	
	Number	Percentage
Drove Alone	39,015	81.7%
Carpooled	5,969	12.5%
Public Transportation	191	0.4%
Bicycle	48	0.1%
Walked	573	1.2%
Other Means	621	1.3%
Worked At Home	1,289	2.7%

Source: 2012-2016 American Community Survey

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.³⁹ 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.

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.

³⁹ Carroll County Economic Profile. Carroll County Chamber of Commerce. No Date.



Carroll County, Georgia

Comprehensive Plan Update 2018

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.⁴⁰ 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

⁴⁰ Carrollton's existing inventory of empty retail space should significantly reduce demands for new retail space.



Carroll County, Georgia

Comprehensive Plan Update 2018

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 transportation and distribution centers 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.

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 seeks 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 – Advantage Carroll 2020 Plan. 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 and the Carroll County Economic Development Foundation, commonly known as Carroll Tomorrow, the county economic development organization



Carroll County, Georgia

Comprehensive Plan Update 2018

(EDO), provide a wide range of economic development services including: business directories, community information dispersion, business education, workforce and leadership development, tourism and convention planning, and marketing assistance. Carroll Tomorrow provides long-range visioning with quarterly reporting to their corporate/public investors of economic, workforce and community development activities, and leadership and government cooperative programs.

Carroll Tomorrow, which operates with pledged private/public revenues on a 5-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 Advantage Carroll 2020 Plan, 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: advanced manufacturing, food processing, healthcare, construction, technology, and distribution and logistics.

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 Economic Development (DEcD), Georgia Department of Community Affairs (DCA), Carroll Tomorrow and the Carroll County Chamber of Commerce and local institutions. The DEcD promotes Georgia and its communities for prospective industrial and commercial development. The State of Georgia has been named the 'Best Place to Do Business' by Area Development magazine for five consecutive years. The DEcD and the Georgia Governor's Office



recommends development projects for funding via the DCA. Carroll County has been a consistent recipient for this funding over the last seventeen years, including location of Decostar, Printpack, Yachiyo, and Trident Seafoods, as well as expansions of Southwire and Sugar Foods. 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 4-55** provides a brief description of available DCA programs.

Exhibit 4-55: 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



Carroll County, Georgia

Comprehensive Plan Update 2018

Program Title	Program Description
	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.
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



Carroll County, Georgia

Comprehensive Plan Update 2018

Program Title	Program Description
	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 Burson Center, a 24,400 square foot mixed-use incubator owned and operated by Carroll Tomorrow, facilitates regional 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 warehousing/light manufacturing space. In 2018, the Center will open a high-tech Makerspace, the Tinker's Box, for invention and product proto-typing.

The University of West Georgia's-Small Business Development Center offers management training and technical assistance to small business owners in the six-county west Georgia 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 are almost at capacity. However, there are few available sites encompassing at



Carroll County, Georgia

Comprehensive Plan Update 2018

least 150 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.⁴¹ 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 continued to improve in recent years from increased secondary educational attainment to expanding cooperatives throughout the county. 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.⁴² Carroll County created the Carroll/Carrollton Education Collaborative (CCEC) in 2015, including the University of West Georgia, West Georgia Technical College, Carroll County Schools, Carrollton City Schools, Carroll County Chamber of Commerce to tackle many of the workforce education and development issues being expressed by the business community. Retaining graduates, training the existing labor force and improving public school student performance have been specific strategies in which 'to enroll, enlist or employ' the local populace well into the future.

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 Technical College System of Georgia. This program offers training in numerous subject areas including, but not limited to: industrial technology, computer training, productivity enhancement, leadership, customer service and environmental safety. WGTC is pursuing state funding support to build a new local campus in Carrollton by 2021.

F. Economic Growth Projections

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

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



Carroll County, Georgia

Comprehensive Plan Update 2018

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 promotion and development of Buffalo Creek Technology Park using public and private investments;
- Procure additional property for industrial development within access to transportation corridors and necessary infrastructure.
- Ongoing workforce development efforts with WGTC and UWG and the CCEC; and
- Active participation in and use of available economic development programs (see **Exhibit 4-55**).