



Queen  
Anne's  
County

MARYLAND

WHERE SHORE  
LIVING BEGINS

2025-2030

# Economic Development Strategy

PREPARED BY:

**emergent  
method**



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# Letter from the Director

**Dear Queen Anne's County business owners, community partners, residents and visitors,**

As Director of Economic and Tourism Development, I am excited to present this economic development strategy document that outlines a clear path forward over the next five years. This new plan reflects both the tremendous opportunities before us and our unwavering commitment to preserve the unique qualities that make Queen Anne's County- Where Shore Living Begins!

This strategic plan represents a carefully crafted approach, built upon the solid foundation laid by past initiatives and the work of so many of us. Through this process, the Economic Development Commission (EDC) has affirmed and refined its mission and vision, ensuring that all work aligns with our goals of fostering thoughtful, sustainable growth that enhances quality of life for everyone in our county. The EDC plays a critical role in leading and championing economic development while balancing and preserving the distinctive character that has long drawn people to our shores, and we are ready to get to work to make real progress in each of the five broad priority areas outlined in this document.

As we move forward, intentional collaboration will be crucial, creating a multiplier effect for each effort and investment in support of our community's growth and prosperity. Working together with county residents, businesses, and partners throughout the region, we can ensure that Queen Anne's County remains a place that values both economic and environmental sustainability, achieving balanced growth that respects our heritage, and safeguards the natural beauty that surrounds us.

In developing this plan, we engaged extensively with local stakeholders—business owners, industry leaders, and residents—and heard their shared commitment to a vision of Queen Anne's County as a vibrant, welcoming, and prosperous community. Each priority in this plan addresses fundamental needs, from modernized transportation to workforce housing, enhanced tourism, and support for local businesses, all of which are essential for strengthening our community.

As we embark on this journey, I invite each of you to join us. Together, we can realize a vision of economically and environmentally sustainable growth that respects our heritage and enhances the quality of life for all who call Queen Anne's County home. This is an exciting time, and with our community's continued support and collaboration, we are confident in our ability to achieve a future where Queen Anne's County's strengths are not only preserved but amplified.

With gratitude and optimism for the future,

**HEATHER TINELLI**

**Director of Economic and  
Tourism Development**

Queen Anne's County





# Executive Summary

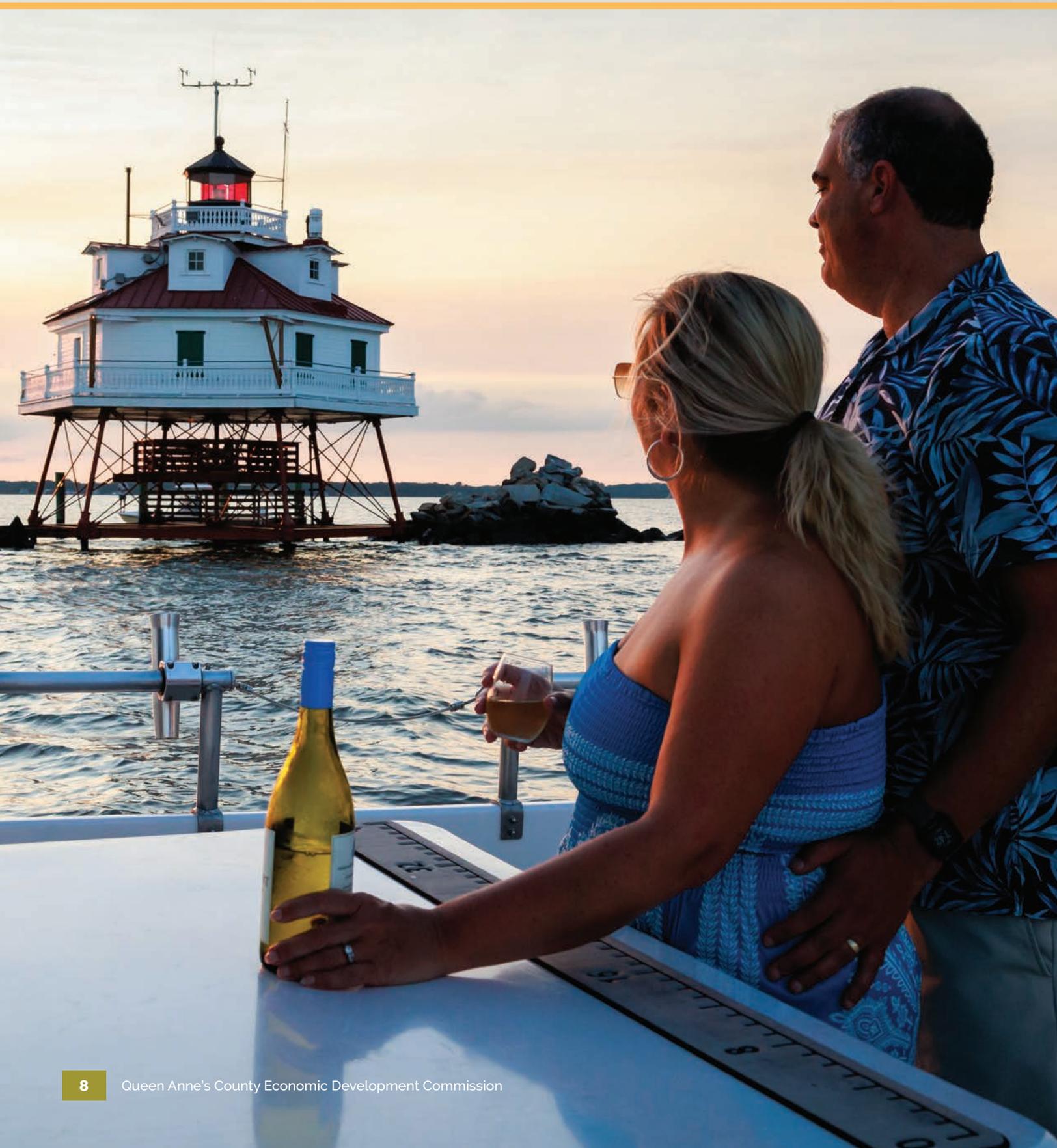
Queen Anne's County's Economic Development Commission has developed a strategic plan to guide its economic development efforts over the next five years.

The plan was developed for the Queen Anne's County Economic Development Commission, in close partnership with the Department of Economic and Tourism Development, to drive meaningful progress through a shared vision and coordinated implementation. The development of this plan was driven by extensive stakeholder engagement including one-on-one interviews with key stakeholders including business owners, industry leaders, residents, and representatives from the county, community listening sessions, and a community survey.

The five priority areas identified in the plan are the culmination of this collaborative effort, providing a roadmap for the county that preserves its unique character and small-town charm while fostering sustainable growth and enhancing the quality of life for residents and visitors alike. As we move forward, we are committed to strategies in support of the following priority areas:

- **Maintain a Sense of Community and Enhance Quality of Life:** Preserving the small-town charm and natural beauty that defines Queen Anne's County, while expanding access to foundational services and entertainment and family-friendly amenities. Investment of additional resources in the northern county will ensure all areas of the county are a great place to live, work, and play.
- **Champion the Increase of Quality, Accessible Workforce Housing:** Workforce housing is vital for economic growth and community stability. Through strong partnerships, educating the public on the importance of affordable housing, and efforts to reduce barriers to development, we aim to build a robust housing inventory that benefits businesses, residents, and young families alike.
- **Diversify and Expand Transportation Offerings To and Through the County:** Taking a holistic approach to transportation, we will prioritize connectivity through solutions like water-based transit, on-demand transportation, and bike trails. By collaborating with state and regional partners, we aim to reduce congestion, strengthening links between residential areas, schools, and business hubs, and ensuring reliable and robust transportation options.
- **Facilitate Business Growth and Attraction:** We are committed to fostering a thriving business environment by supporting local businesses, attracting new industries, and streamlining resources for entrepreneurs. Through strategic investments in workforce development, resource navigation, strategic partnerships, and the effective utilization of existing assets, we will drive sustainable economic growth for the county.
- **Elevate Tourism Throughout the County:** Queen Anne's County will leverage its agricultural, maritime, and cultural heritage to highlight its position as a premier tourism destination. Focused strategies will prioritize group travel, corporate events, sports tourism, and weddings, ensuring assets serve both locals and visitors.

As we move forward, the strategies identified within this plan will be used to guide the decision making and investment of resources and time in the coming years, in the pursuit of supporting an economically and demographically vibrant community, full of promise for current and future residents and businesses.



# Introduction

**The Queen Anne's County Economic Development Commission plays an integral role as an advisor to the County Commissioners, offering strategic guidance and informed recommendations on economic growth initiatives throughout the region. The commission, comprised of appointed members who represent the county's diverse industries and geography, provides thoughtful and intentional direction on policies that influence our community's development and prosperity.**

A community's strength and long-term success are deeply connected to its ability to create opportunities for residents and businesses. Queen Anne's County is fortunate to have a wealth of natural and economic resources: our picturesque landscape, vibrant agricultural sector, and unique small towns, all within close proximity to major metropolitan areas and cultural hubs. This combination of assets has made the county a destination for people to visit, work, and call home.

As we look toward the future, our focus remains on supporting sustainable growth that enhances the quality of life for all who live and work here. Maintaining this quality of life requires thoughtful planning and intentional investment in areas that will preserve the county's character and create a thriving economy for current and future generations.

The Economic Development Commission is dedicated to guiding and championing strategic growth that not only sustains but enhances what makes Queen Anne's County special. Achieving this vision requires a delicate balance: fostering economic development while maintaining the unique qualities that drew residents here in the first place. We believe this is not only possible, but essential for the future prosperity of the county.

This five-year strategic plan was shaped through a thorough review of available data and ongoing research, as well as meaningful engagement with community members and local stakeholders. One-on-one interviews and listening sessions with business owners, industry leaders, and residents highlighted consistent themes – a shared commitment to preserving the county's

distinctiveness, while also ensuring it reaches its full potential and a strong desire to see the county grow thoughtfully, expand opportunities, and become even more vibrant, without losing the qualities that make it such a special place.

The five priority areas identified in this plan are the culmination of this collaborative effort and represent a roadmap for targeted investment in the resources and strategies essential for the county's continued success. As we plan for the future, it is vital to recognize that the world around us is constantly evolving, and we must be proactive and strategic in our efforts in order to maintain the quality of life and economic strength we currently enjoy.

Each of these priority areas addresses foundational needs for our residents – such as workforce housing, modernized transportation options, support for existing businesses, and tailored approaches to attract new enterprises that complement our local economy. Additionally, they strengthen Queen Anne's County as a destination for visitors. Expanding and promoting tourism in a sustainable and intentional manner is a key component of this plan, ensuring that the "best-kept secret" of the Eastern Shore becomes a vibrant, welcoming place that shares its charm with others.

Queen Anne's County is truly one-of-a-kind. As we look ahead, we remain both optimistic and realistic. Success is not guaranteed, but through a shared commitment to these priorities, the Commission is confident we can build a future that both preserves and enhances the best aspects of shore living, creating a prosperous and dynamic community for residents and visitors alike.



# Acknowledgments

The creation of this strategic plan would not have been possible without the dedication and collaboration of the Queen Anne's County Economic and Tourism Development and the guidance of the Economic Development Commission.

We deeply appreciate the time and insights shared by the many individuals who participated in interviews, focus groups, and listening sessions. Your willingness to engage in this process and represent the interests of your unique communities has been invaluable. Thank you for your commitment and contribution to the future of our county.

## Queen Anne's County Economic and Tourism Development

**Heather Tinelli**  
Director

**Rebecca Clark**  
Economic Development Administrator

**April Plummer**  
Marketing Administrator

## Interview Participants

**Mike Clark**  
QAC Housing Authority

**Shelly Gross-Wade**  
Bay Crossing Consulting

**Linda Friday**  
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**Dave Harper**  
Chesapeake College

**Mary Jo McCulloch**  
Travel & Tourism Advisory Committee Member

**Nancy LaJoice**  
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**Lara Wilson**  
University of Maryland Medical System

**Mike Whitehill**  
Economic Development Incentive Fund  
Commission Member

**Nikki Neboshynsky**  
Tasty Toucan

## Queen Anne's County Economic Development Commission

**Heather Bacher (CHAIR)**  
Burke & Herbert Bank

**Shelly Gross-Wade (VICE-CHAIR)**  
Bay Crossing Consulting

**Lee Bridgman (SECRETARY)**  
University of Maryland Extension-QAC

**Ed Beres (TREASURER)**  
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**James Riley**  
Clean Systems LLC and Therapy Systems DME

**Brian DeMoss**  
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**Todd Wilhoit**  
Chesapeake Investment Planning

**Patricia Fox**  
Retired Professional Planner/Program & Project Manager



QUEEN ANNE'S COUNTY  
CHESAPEAKE HERITAGE  
— AND —  
VISITORS CENTER

# Mission, Vision, and Values

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**Our mission, vision, and values are the foundation of this strategic plan, guiding every decision and action we take. They represent our commitment to balanced economic growth, aspirations for the county's future, and the principles that shape how we serve our community.**

Together, these elements define who we are, what we stand for, and the impact we aim to achieve as we work to create a thriving, sustainable, and vibrant county for current and future generations.

## MISSION

To pursue economically and environmentally sustainable, balanced economic growth that protects the heritage of the county and improves the quality of life for businesses, residents, and visitors.

## VISION

We envision an economically and demographically vibrant community, full of promise for current and future residents and businesses, that is sensitive to the preservation of our environment, heritage, and rich culture.

## VALUES

### Accountability

We are dedicated to transparency and responsiveness, ensuring our actions reflect the needs and priorities of our residents and community. We lead with integrity, always striving to serve those who rely on us.

### Balance

We strive to thoughtfully address the unique needs of our diverse community, which includes residents, various industries, and countless visitors. Our goal is to create strategies and solutions that respect and support each of these groups, fostering harmony, preservation, and sustainable growth.

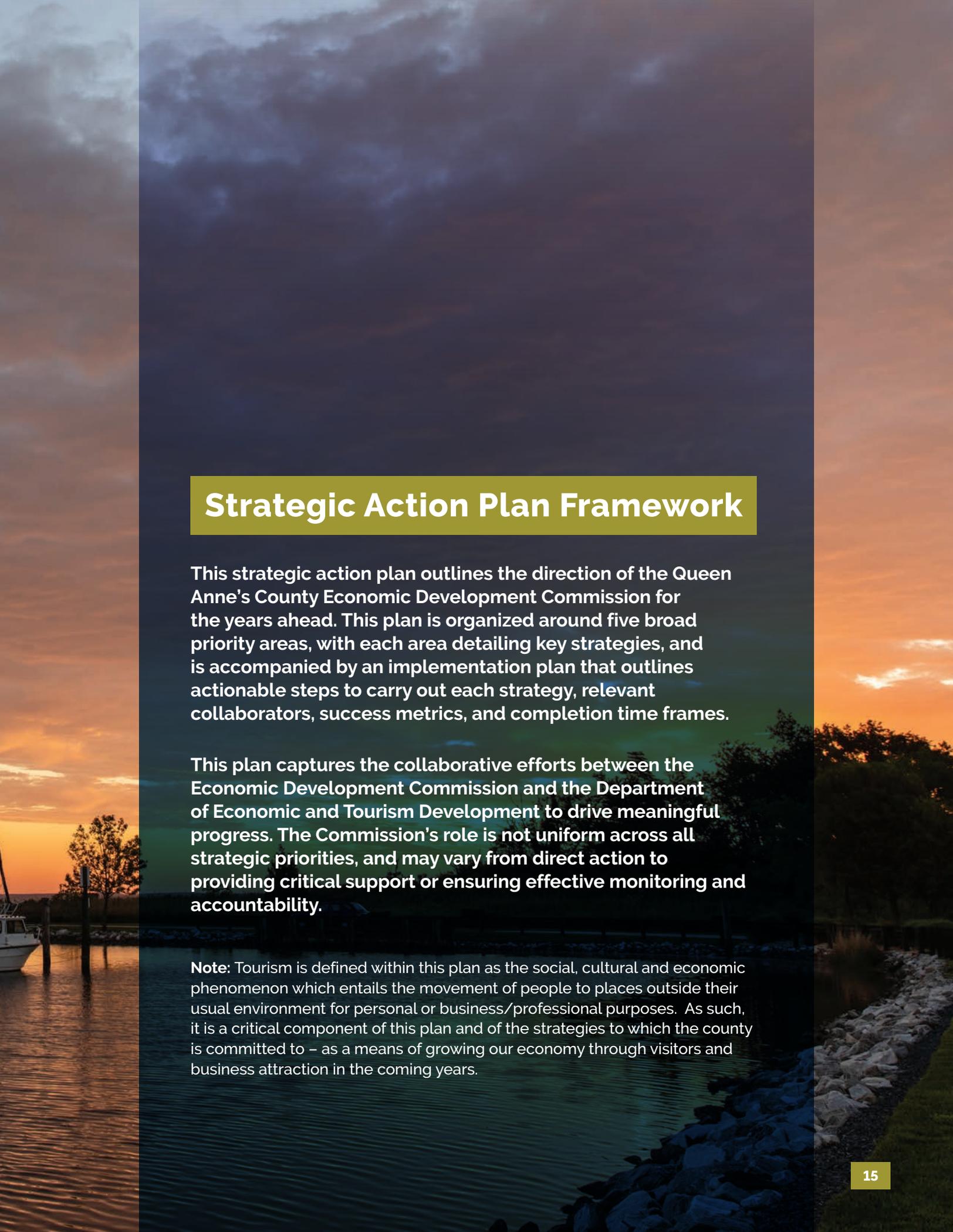
### Collaboration

We believe the best solutions emerge when everyone has a seat at the table. By bringing together diverse voices and working toward shared goals, we build stronger, more inclusive outcomes for our entire community.

### Community

Connection is at the core of everything we do. Our efforts are centered on serving and celebrating what makes our county unique, ensuring that our work enhances the quality of life for all who call this community home.





## Strategic Action Plan Framework

**This strategic action plan outlines the direction of the Queen Anne’s County Economic Development Commission for the years ahead. This plan is organized around five broad priority areas, with each area detailing key strategies, and is accompanied by an implementation plan that outlines actionable steps to carry out each strategy, relevant collaborators, success metrics, and completion time frames.**

**This plan captures the collaborative efforts between the Economic Development Commission and the Department of Economic and Tourism Development to drive meaningful progress. The Commission’s role is not uniform across all strategic priorities, and may vary from direct action to providing critical support or ensuring effective monitoring and accountability.**

**Note:** Tourism is defined within this plan as the social, cultural and economic phenomenon which entails the movement of people to places outside their usual environment for personal or business/professional purposes. As such, it is a critical component of this plan and of the strategies to which the county is committed to – as a means of growing our economy through visitors and business attraction in the coming years.





# Strategic Priorities



# Maintain a sense of community and enhance quality of life

**Preserving the unique character and sense of community that defines Queen Anne's County is a cornerstone of our strategic plan.**

As we continue to grow, it is essential that development complements—not diminishes—the qualities that make this county a truly special place to live, work, and play. Our proximity to major metropolitan areas such as Annapolis, Washington, D.C., Baltimore, Wilmington, and Philadelphia, and the ability to travel virtually anywhere on the East Coast within a day, offers unmatched convenience, but it is the charm of our small-town living and the beauty of our natural surroundings that attract families, retirees, businesses and their employees, and those seeking the distinctive lifestyle of the Eastern Shore.

The county's excellent outdoor amenities, well-maintained parks, expansive coastline, access to the water, and recreational opportunities are critical assets, not only for residents but also for the many visitors who choose to spend their time here. However, we realize that quality of life in any place is not related just to the amenities – but also to access to quality essential services. Our strategic plan emphasizes strengthening and expanding

access to these foundational services – including healthcare access across the county, access to child care services and quality education, and high-quality jobs. As we plan for the future, we remain committed to ensuring these resources continue to be a source of pride for our community and a draw for new families and businesses. Expanding our offerings—such as entertainment, family-friendly amenities, and foundational services in the northern part of the county—will further enhance the quality of life for all who call Queen Anne's County home.

Our approach ensures that enhancements support broader goals around tourism and business attraction, particularly those outlined in the 2022 Comprehensive Plan. By pursuing the addition of amenities that appeal to residents and visitors alike, and by maintaining the safety and upkeep of our shared spaces, we aim to create an environment that continues to reflect the best of what our community has to offer while welcoming new opportunities for growth and development.

## STRATEGIES

- Pursue attraction of privately owned entertainment and outdoor family-oriented amenities and offerings
- Leverage public-private partnerships to attract quality of life resources and services throughout the county in population centers, as well as into the North County
- Collaborate with the Department of Parks and Recreation to establish EDC member seats on the Bike and Pedestrian Committee and the Parks and Recreation Advisory Board
- Strategically recruit quality health care centers and medical service providers into the county
- Collaborate with the county's Division of Housing and Family Services to identify public-private partnership strategies for increasing the accessibility of child care providers
- Partner with local law enforcement to continue ensuring the highest levels of safety and accessibility for residents and visitors throughout the county



# Champion the increase of quality, accessible workforce housing

**People are the backbone of every industry, and no community can sustain or expand its economic vitality without ensuring access to quality, affordable housing.**

A robust inventory of accessible workforce housing is essential not only to support existing businesses but also to attract new companies and retain a strong, diverse workforce in Queen Anne's County. The availability of housing is a critical factor in enabling companies to recruit talent, grow their operations, and contribute to the county's economic development. As such, addressing housing needs is not just a community issue – it is an economic imperative.

Our efforts in this area will be centered around strong partnerships with county, state, and federal entities to support efforts addressing the broader housing challenges facing our region. We will work closely with the county's Department of Community Services and Division of Housing and Family Services to expand the availability of family housing and leverage state and federal funding to support these

developments. At the same time, we will collaborate with the Department of Planning and Zoning to reduce zoning barriers and streamline processes to encourage the growth of our housing inventory.

Additionally, educating the public on the critical role workforce housing plays in sustaining and expanding our economy is a priority. By fostering a deeper understanding of the importance of affordable housing, we can build support for this work and highlight how it will enhance our community's quality of life. Through these coordinated efforts, the commission aims to make progress toward a future where Queen Anne's County offers diverse housing options that attract young families, strengthen local industries, and ensure continued economic prosperity.

## STRATEGIES

- Work collaboratively with the county's Division of Housing and Family Services to identify and address gaps in the county-owned housing inventory
- Identify and promote opportunities to draw down on available state and federal funds to support the expansion of housing inventory
- Build and strengthen connections with private developers who prioritize the building of diverse housing types, with a focus on accessible housing and higher-density developments with integrated commercial offerings
- Research, identify, and consider implementation of new and emerging models to expand workforce housing, including alternative funding models
- Market to and attract early-career and working-age professionals and families to the county to strengthen and grow the county's workforce
- Work collaboratively with the Department of Planning and Zoning to reduce zoning types, zoning challenges, and financial barriers to workforce housing development
- Develop communications to educate the public on the economic importance of workforce housing and how it will positively impact Queen Anne's County



# Diversify and expand transportation offerings to and through the county

As Queen Anne's County continues to grow, the impact of increased traffic and congestion has become a significant concern for residents and businesses alike.

This concern goes beyond car traffic; it reflects a broader need to think holistically about transportation solutions that expand capacity both to and through the county. To support sustainable growth and economic development, we must invest in creative and diverse transportation solutions that allow people and goods to move smoothly throughout the county and beyond. Without reliable, accessible transportation options, even the most vibrant industries will struggle to thrive.

Our strategy looks beyond traditional infrastructure investments and embraces innovative approaches that leverage the county's unique resources. With over 400 miles of coastline and an extensive network of waterways, Queen Anne's County has an opportunity to expand its use of water-based transportation, building on recent progress with water

taxis and ferry services. Additionally, we recognize the need for intentional connections between residential areas, educational institutions, and business hubs, especially in our more rural parts of the county.

The commission is committed to working with regional and state partners to expand public transportation routes and pursue multi-modal options like bike trails that link neighborhoods and local amenities. We will also advocate for funding and policies that support smart growth and reduce the strain on our roads, particularly during peak travel seasons when congestion is at its highest. By adopting a broad and forward-thinking approach to transportation that increases capacity and modalities, we can reduce gridlock, improve quality of life for residents, and create a more connected and prosperous county for all.

## STRATEGIES

- Continue pursuing funding for a regional ferry and water taxi services to and through the county
- Expand connectivity of bike trails throughout the county, connecting neighborhoods and amenities
- Market and promote the new and growing trail systems throughout the county as a means of alternative transportation
- Work with regional and county entities to expand public transportation routes, including the exploration of bus routes connecting the business parks and community and technical colleges, and larger employers throughout the North County
- Collaborate with rideshare corporations to expand available transportation, leveraging private transportation networks to address transportation gaps
- Participate in the Chesapeake Bay Crossing Study (Tier 2 National Environmental Policy Act) to advocate for expanded current and future transportation capacity across the bay
- Work collaboratively with other regional, state, county, and federal entities to pursue funding for opportunities that leverage and improve traffic patterns to and through the county



# Facilitate business growth and attraction

**Supporting local businesses and attracting new industries is at the core of what we do.**

The commission and the Economic Development Department are dedicated to reducing barriers for existing companies while also paving the way for aspiring entrepreneurs to establish themselves in Queen Anne's County. This section of the plan focuses on strengthening our internal structures and resources to better serve our business community, ensuring that businesses of all sizes have the support they need to thrive.

We recognize that we must continually evolve to remain competitive – this includes evaluating our own operations to streamline processes, expanding our staffing resources to provide more dedicated support, and creating a clearer path for navigating the county's economic development offerings. Our goal is to ensure entrepreneurs and businesses can quickly access the guidance and tools they need to succeed – whether they are just starting out or looking to grow within the county.

Our commitment to advocating for new opportunities for business growth is equally important – opportunity

expansion involves promoting infill development to make better use of existing commercial spaces, as well as fostering a strong pipeline of skilled workers through partnerships in trades education and job training. Through existing assets and infrastructure, our county is well positioned to pursue growth in many key areas including manufacturing, hospitality, agriculture, and maritime. As we pursue growth across the county, we aim to fully leverage the unique potential of North County, an area with significant opportunities for progress while honoring preservation. By positioning Queen Anne's County as a central convener for our municipalities and a key resource for businesses, we can collectively pursue shared economic goals, support diverse business needs, and ultimately strengthen our local economy.

Through these efforts, we aim to create a more vibrant business environment that welcomes innovation, supports entrepreneurship, and drives sustainable economic growth across the county.



## STRATEGIES

- Centralize and streamline resource navigation and develop robust how-to guides for startups and new businesses
- Develop an internal structure for board and commission staffing, board development, and utilization, with specific outcome-related goals to increase utilization of board and commission expertise
- Conduct a comprehensive audit and comparative analysis of current county-level incentives compared to peer counties, right-sizing offerings to ensure competitiveness
- Expand the county-specific economic development incentive fund, supplemented through offerings of local financial institutions
- Support additional investment from the county in trades education and co-enrollment, partnering with Queen Anne's County schools, local businesses, and community and technical colleges to expand apprenticeship programs, building a stronger pipeline of talent
- Facilitate partnerships between community and technical colleges and employers to develop workforce training curricula and programs, preparing workers for changing industry needs
- Connect entrepreneurs to small business advising and supports through the local mentorship groups, SBCD, SBA, and MCE
- Advocate for infill and occupancy of current commercial space to promote responsible land use, with prioritization of target industries identified through the industry analysis study
- Explore creation of a county-based redevelopment authority to lead redevelopment efforts of existing physical assets throughout the county
- Work collaboratively with municipalities to develop and achieve municipal-level economic development goals
- Advocate for regulatory changes to streamline and support business activities, and to promote investments in enabling infrastructure to business growth
- Support the hiring of an agricultural specialist role to provide direct support to agritourism businesses, particularly through the planning and development stages
- Expand and diversify funding sources for marketing and business attraction efforts

# Elevate tourism throughout the county

**With its diverse landscapes, rich agricultural traditions, and deep-rooted maritime heritage, Queen Anne's County has a wealth of assets that make it a unique destination on the Eastern Shore.**

From picturesque small towns and vibrant cultural sites to stunning natural beauty and authentic agritourism experiences, the county offers something special for every type of visitor. However, with so many distinctive qualities, the challenge lies in creating a focused, cohesive strategy that allows us to fully leverage these strengths while developing new opportunities that attract more visitors and enrich the local community.

Over the next five years, our goal is to build and execute a comprehensive tourism plan that connects and enhances these assets, fosters collaboration, and positions Queen Anne's County as a distinctive

destination unlike any other. This effort will include implementing the recommendations of the recently completed Agritourism Study, while also exploring new ways to promote and celebrate the county's heritage. We will prioritize the development of assets that serve both locals and visitors alike, including an in-depth focus on preserving and sharing the county's rich cultural heritage, from the traditions of the watermen and maritime communities to agricultural and historical experiences that define our region. By expanding our tourism offerings and creating clear, strategic marketing and development initiatives, we can draw more visitors - encourage our residents - to experience the best of what we have to offer.

Recognizing the potential in specialized tourism markets, our strategies will also place a concentrated emphasis on group travel, corporate events, sports tourism, and the wedding market. As part of this strategy, we will complete an economic analysis of the wedding market's impact and future outlook, then integrate these findings to drive growth within this sector. Additionally, we are proud to be part of TEAM Maryland, the statewide initiative that collaboratively markets Maryland to the sports industry.

We see tourism as a way to boost visitor numbers and as a means to strengthen support for community initiatives and businesses. Investing in these diverse tourism offerings will create new amenities and experiences that benefit both residents and visitors, enhancing the quality of life for all. From enhancing existing resources like museums and cultural sites to identifying opportunities for new events and recreational activities, we aim to build a tourism system that supports sustainable growth and preserves the character of our county for future generations.





## STRATEGIES

- Build out agritourism resources and opportunities in line with the Agritourism Study
- Support the expansion of the number, quality, and accessibility of history-focused offerings throughout the county
- Develop product and marketing assets, including marketing toolkits, to support the increase of visitors to agritourism, history, and heritage-based destinations and tourism offerings
- Conduct an audit of the current wedding market economic impact and develop targeted marketing campaigns to highlight unique county assets
- Develop and implement a cohesive tourism development plan with marketing and positioning strategies
- Assist local museums with pursuit of funds to extend operating hours
- Collaborate with county entities to designate a portion of the forthcoming housing rental tax for tourism marketing efforts
- Identify opportunities to pursue sporting events or tournaments (youth, adult, travel), leveraging proximity to major sports teams and markets and existing outdoor infrastructure
- Support the hiring of a heritage tourism specialist role to support existing historic sites with resource development and marketing functions
- Market and attract new rental utilization of the newly renovated 4-H Park for large-scale events
- Evaluate the viability of development of a conference and event center tailored to small to mid-size events





## Implementation

To further guide the EDC and the Office of Economic and Tourism Development, an accompanying implementation plan has been developed. This plan details actionable steps within each strategy, along with collaborators, measurable metrics, and completion time frames.





# APPENDIX A: **Stakeholder Engagement**



## **Comprehensive stakeholder engagement efforts were a cornerstone of the strategic planning process.**

In coordination with the ETD, key individuals in the community were identified for one-on-one, confidential interviews, and additional community members and county stakeholders were invited to participate in in-person focus groups. The purpose of these interviews and focus groups was to gather direct input from the community to better understand the local economy, identify key needs of the business community, and gather general feedback on key priorities and areas of focus where the county is primed for growth. In addition to in-person stakeholder engagement, an online community survey was distributed to community partners and residents through the county's email list, website, and social media accounts. This survey was designed to gather feedback from a broader group on the county's strengths, weaknesses, and areas of opportunity or need.

### **Interviewees**

Fourteen interviews were conducted throughout June and July 2024. When possible, interviews took place in-person; others were conducted by Zoom, or in one case, by phone.

**Mike Clark**

QAC Housing Authority

**Shelly Gross-Wade**

Bay Crossing Consulting

**Linda Friday**

QAC Chamber

**Dave Harper**

Chesapeake College

**Mary Jo McCulloch**

Retired

**Nancy LaJoice**

Maryland Department of Commerce

**Amy Moredock**

QAC Planning and Zoning

**April Plummer**

QAC Economic & Tourism Development

**Heather Tinelli**

QAC Economic & Tourism Development

**Jesse Parks**

KRM Development Corporation

**Barry Waterman**

Coldwell Banker Waterman Realty

**Lara Wilson**

University of Maryland Medical System

**Mike Whitehill**

Retired

**Nikki Neboshynsky**

Tasty Toucan

## Focus Groups

Four in-person focus groups were conducted the week of June 17, 2024. Of these sessions, three were general sessions open to select invited community members, and one was held with the Economic Development Incentive Fund Commission. An additional in-person focus group was conducted on July 9 with invited members of the manufacturing industry.

## PARTICIPANTS

Focus groups were attended by members of the Economic Development Incentive Fund Commission, QAC business community, and manufacturing industry.

## FACILITATION QUESTIONS

1. What is your perception of Queen Anne's county economy today?
2. Would you say the county's economy is different from how it was 2 years ago? 5 years ago? 10 years ago? If so, in what manner?
3. When it comes to areas of economic growth in the county, what are 2-3 factors or recent activities that your organization/industry is particularly proud of and that make you excited for the future?
4. What key assets (infrastructure, geography, location, etc.) and resources in the county do you think most contribute to its economic growth and competitiveness? Are these assets being properly utilized?
5. What are the main differences between conditions (assets, geography, resources, demographics, workforce, etc.) in the county relative to the surrounding area/region?
6. Are there factors or conditions outside the county's control that directly impact economic growth in the county? Are those elements concentrated in any one industry or sector?
7. What is changing with local economic conditions that may influence future changes in industries within the county, or the county's overall economy?
8. Are there specific opportunities that you think will be important in growing the county's economy in the years to come?
9. Are there specific industries that you think the county is best positioned to attract and support in the future? How do these compare to the existing industries in the county?
10. What are some of the concerns and/or requests that businesses in Queen Anne's county mention or consistently highlight?
11. What are you most worried about when it comes to economic growth in the county? What are the major limiting factors? Do these differ when considering growth of current businesses versus attraction of new businesses?
12. How do you or does your organization currently interact with the county? With the EDC?
13. How well does the county, and the EDC, engage and align with its various stakeholders and partners?
14. Are there specific things that the county/EDC could and/or should do to better work with your organization to support the county's economy?
15. How are companies positioned to succeed in Queen Anne's county– policy/tax environment, assets, quality of life, resources, connectivity to workforce development programs and inventory of potential workforce?
16. What are the biggest threats to economic growth in the county that could create risks for new and existing businesses? What should be done to proactively address these threats/risks?
17. Where should Queen Anne's focus its efforts to ensure existing employers are positioned in both the short-term and long-term for success? In other words, what are the biggest obstacles that may constrain your company's ability to grow?
18. What downstream/complimentary opportunities exist to bring in more suppliers or companies that can aid in the growth of these industries (as well as the companies that comprise them)?





# APPENDIX B: Community Survey Report

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# Executive Summary

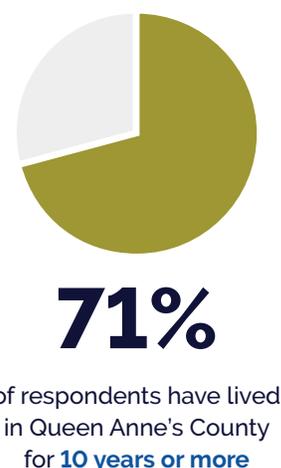
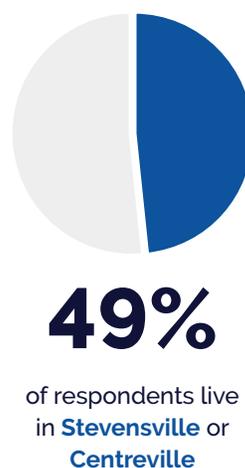
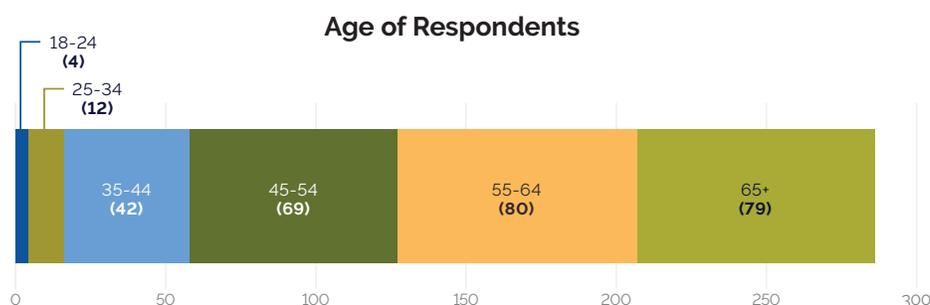
In 2024, Queen Anne’s County Department of Economic and Tourism Development (ETD) launched a strategic planning effort to develop the next strategic action plan for its advisory board – the Economic Development Commission (EDC). As part of this effort, a survey was conducted to gather feedback from the community about the ETD’s services, programs, operations, and future priorities. This survey launched on Thursday, May 30, and was open through Friday, June 28. Throughout this fielding period, reminder emails were sent to the residential and business community, social media posts were distributed to encourage participation, and flyers were posted in the ETD office. In total, 286 residents and business community members responded to the survey.



## DEMOGRAPHICS

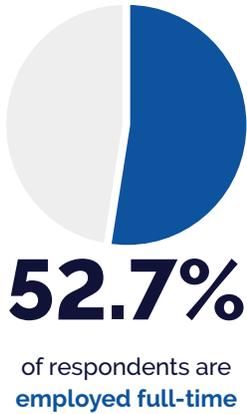
To begin, respondents were asked a series of demographic questions. First, they were asked to share where in the community they live. Stevensville is the best-represented with 70 respondents (24.5%), followed by Centreville (69 responses, 24.1%), Chester (35 responses, 12.2%), Queenstown (29 responses, 10.1%), Queen Anne (18 responses, 6.3%), Grasonville (17 responses, 5.9%), Sudlersville (8 responses, 2.8%), Church Hill (6 responses, 2.1%), Kingstown (6 responses, 2.1%), Millington (4 responses, 1.4%), Barclay (1 response, 0.3%), Kent Narrows (1 response, 0.3%), and Templeville (1 response, 0.3%). Further, 22 participants listed living in other incorporated areas (7.7%).

Participants were then asked for their age. Many are between 55-64 (80 responses, 28.0), followed by those 65 or older (79 responses, 27.6%), 45-54 (69 responses, 24.1%), 35-44 (42 responses, 14.7%), 25-34 (12 responses, 4.2%), and 18-24 (4 responses, 1.4%).

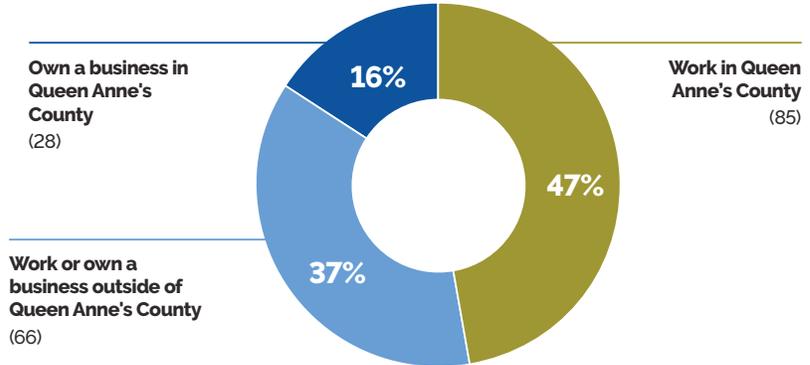


To gauge the connection participants have to Queen Anne's County, they were asked to list the length of time they have either lived or worked in the county. Just under one-third of respondents have lived in the county for 30 years or more (81 responses, 29.2%), followed by 20-29 years (60 responses, 21.7%), 10-19 years (56 responses, 20.2%), 5-9 years (33 responses, 11.9%), 3-5 years (26 responses, 9.4%), and 2 or fewer years (18 responses, 6.5%).

Most respondents are employed full-time (149 responses, 52.7%). Following this, respondents listed being retired (81 responses, 28.6%), self-employed (29 responses,



### Respondents' Working Location



10.2%), employed part-time (13 responses, 4.6%), not employed outside the home (6 responses, 2.1%), other (4 responses, 1.4%), and full-time students (1 responses, 0.4%). There were zero respondents who listed being unemployed. For further information regarding employment status, respondents were asked to specify their working location. Just under half work in Queen Anne's County (85 responses, 47.5%), followed by those who work or own a business outside of Queen Anne's County (66 responses, 36.9%) and those who own a business in Queen Anne's County (28 responses, 15.6%).

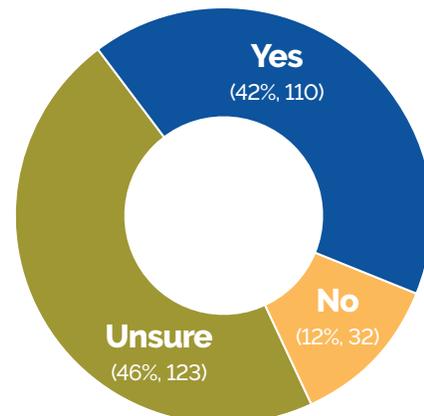
Regarding the mission, respondents were asked to rate how familiar they were with EDC's initiatives, programs, and services on a scale of 1-to-5 with a 1 indicating very unfamiliar and 5 indicating very familiar. With an average score of 2.1, residents and business community members are generally unfamiliar with the work of the EDC.

Variations in average familiarity score are present based on respondents' working location and business ownership status. On average, those that own a business in the county are the most familiar with the work of the EDC (2.5 average score), followed by those who work in the county (2.3 average score). Respondents who work or own a business outside of the county are the least familiar with the EDC's work (1.9 average score). Respondents were also asked to share if they believe the mission statement is still applicable for the EDC. A large portion of respondents selected unsure (123 responses, 46.4%), followed

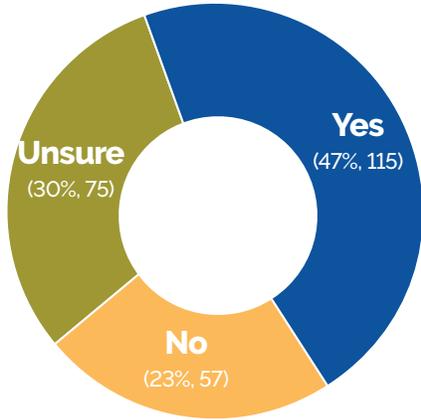
closely by those that selected yes (110 responses, 41.5%). As a follow-up to the previous question, respondents were asked to share any suggestions for changes to the current mission statement. The top three responses varied with some stating that the statement did not need to be changed (15 responses), some reporting that they would like to include a consideration to all stakeholder needs (10 responses), and finally, some reporting an interest in an elaboration and enforcement of sustainable economic development (7 responses).

Concerning the vision statement, participants were asked if they believed that the vision statement appropriately describes what the EDC is striving to achieve in the coming years. Most respondents selected yes (115 responses, 46.4%), followed by

### Is the mission statement still applicable for the EDC?



**Is the vision statement still applicable for the EDC?**



unsure (75 responses, 30.4%), and no (57 responses, 23.1%). Similar to the mission statement, respondents were asked to provide any suggestions for changes to the vision statement. The top three responses from respondents ranged from some emphasizing that the current focus on economic development is harmful to the environment (6 responses), that the vision statement should stay the same (11 responses), and that consistent development is harmful to the county and its residents (10 responses).

**STRATEGIC PLANNING**

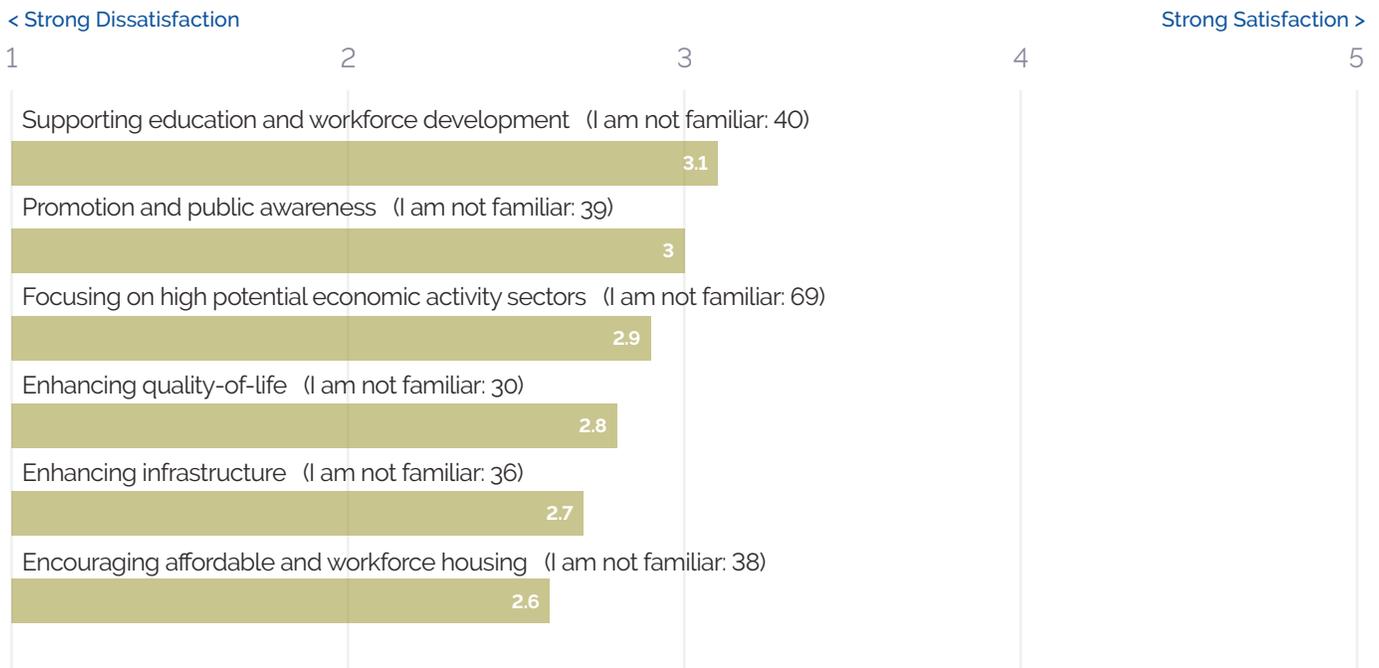
As part of the survey, participants were also asked about their opinions on the EDC's work related to

its previous strategic plan. To start, participants were asked to rate their satisfaction with the EDC's work in each of the six priority areas on a scale of 1-to-5 with a 1 indicating strong dissatisfaction and 5 indicating strong satisfaction, with the option to select "I am not familiar." In addition, respondents were given the opportunity to share any ideas they have for improvements in these priority areas via open-ended questions.

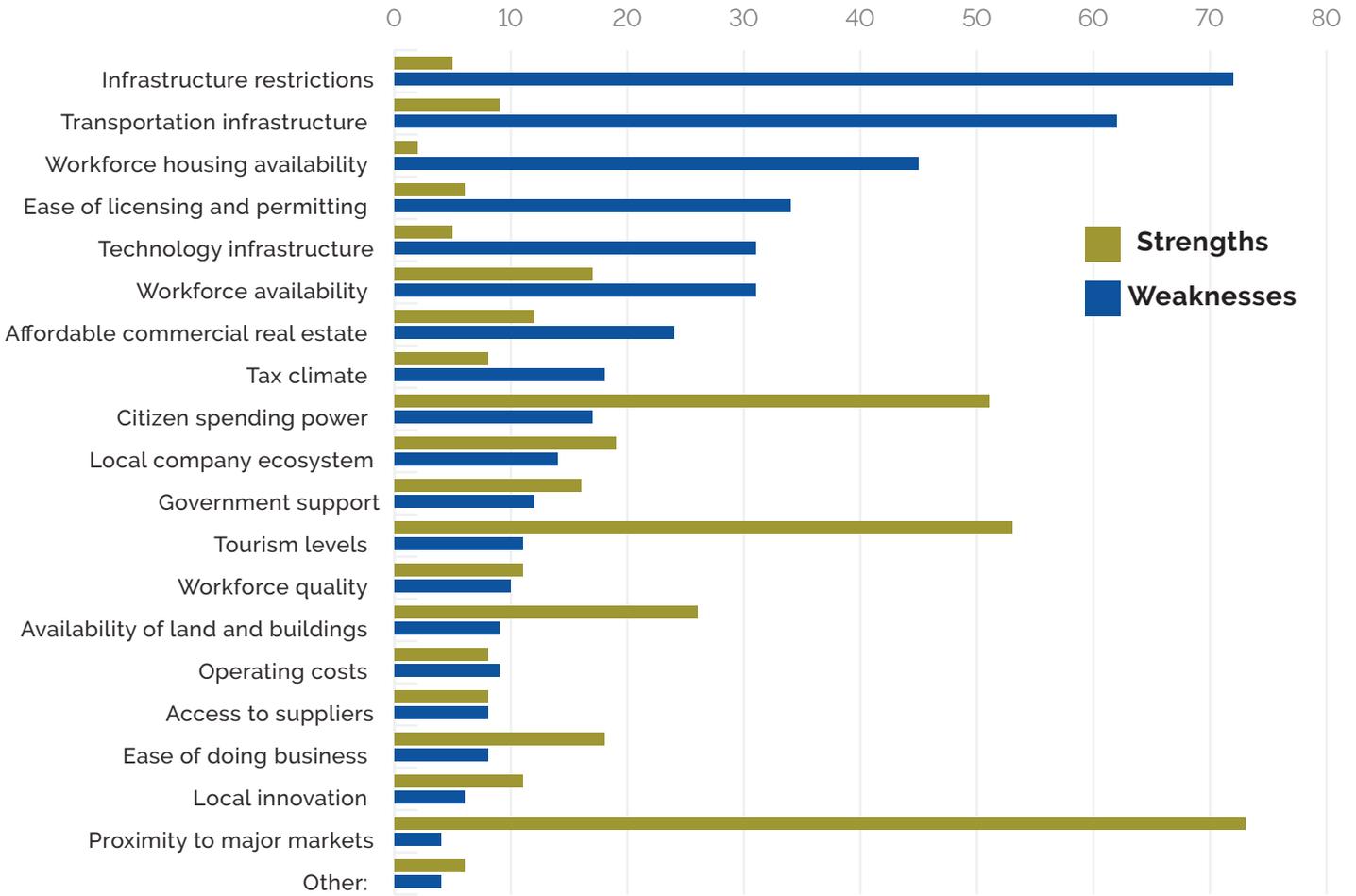
The priority area focusing on high potential economic activity sectors had an average satisfaction score of 2.9, with many respondents selecting "not familiar" (69 responses). Respondents were also asked if they had any specific ideas for how the EDC could improve this sector. The top responses varied with respondents interested in the reduction of new building developments to favor the enhancement of current infrastructure (16 responses), diversification of incoming businesses (8 responses), and an increase in available high-paying job sectors (6 responses).

The next priority area, supporting education and workforce development, had an average satisfaction rate of 3.1, with a total of 40 respondents selecting "not familiar." Similar to the previous questions, respondents were asked what ideas they have to enhance this particular sector. With diverse responses, there was a reported interest in increasing support for QAC schools and Chesapeake College (6 responses) and an interest in increasing job

**Satisfaction of EDC's Work in Six Priority Areas**



### Perceived Strengths and Weakness of Doing Business in the County



opportunities that do not require four-year degrees (4 responses).

The priority area, enhancing infrastructure, had an average score of 2.7 and a total of 36 respondents selecting “not familiar.” Respondents were prompted to offer any improvements they could think of that would benefit the sector. Responses ranged from some interested in an improvement to county resources like transportation (11 responses), some not seeing any need for improvements (2 responses), and some not seeing any current growth in the sector (2 responses).

The following priority area, promotion and public awareness, had an average score of 3.0 with a total of 39 respondents selecting “not familiar.” When questioned about any potential improvements, respondents answered with an interest in increasing awareness through the expansion of marketing and communication efforts (5 responses), hosting public conferences for residents to ask questions

(1 response), increasing public access to county meetings (1 response), and that the county’s involvement in this sector is satisfactory (1 response).

The next priority area, encouraging affordable and workforce housing, had an average score of 2.6 and a total of 38 respondents selecting “not familiar.” Similar to previous priority areas, respondents were asked to provide any ideas for improvements to the area. The top responses reported that there was a need to adjust the term “affordable housing” as it is not realistic of the current options (10 responses); however, some respondents reported that there was a need to deprioritize development of low-housing options (6 responses). Lastly, a respondent claimed a need to develop smart growth strategies (1 response).

The last priority area, enhancing quality-of-life, had an average score of 2.8 and a total of 30 respondents selecting “not familiar.” Consistent with previous questions, respondents were asked to report any improvements they could identify to enhance this

priority area. The top responses reported that there is an interest in developing resources within county limits (11 responses), decreasing the urban sprawl and new infrastructure development (5 responses), and offering more opportunities for all age groups (3 responses).

Respondents were then asked to rate the overall strength of the business environment in Queen Anne's County. Strength was rated on a scale of 1-to-5 with 1 indicating a poor business environment and 5 indicating an excellent business environment. With an average score of 3.0, respondents believe that Queen Anne's County has an average business environment.

Next, respondents were asked how they would rate the overall quality of life in Queen Anne's County on the same 1-to-5 scale. With an average score of 3.5, respondents find the overall quality of life to be above average. Newer residents, those that have lived in the county for 2 or fewer years, are the most satisfied with quality of life with an average score of 4.0, indicating that it is above average.

To understand the business community's utilization of EDC business incentives, respondents were asked to share any of the incentives they used. The two most popular answers were permitting support (5 responses) and arts and entertainment district tax credits (4 responses). Many respondents listed "other" as their choice and provided what those specific services were (13 responses). Of those who selected "other," most respondents reported that they have not used any of the listed incentives (6 responses). Following, respondents reported using the 2020 Small Business Assistance and Recovery Fund (1 response) and the 2021 Telework & Online Sales Relief Fund (1 response), having attended seminars (1 response), and the Entrepreneur Planning and programs (1 response). Respondents also reported

benefitting from higher taxes based off increase of house value (1 response) and remote work grant during Covid-19 (1 response). Lastly, a respondent reported being unsure of the department's ability to successfully execute the listed incentives (1 response).

Respondents believe that Queen Anne's County has an **average business environment**

To understand opinions on the county's overall business climate, respondents were asked to list the top three strengths and weaknesses of doing business in the county. The three most popular choices for strengths were: proximity to major markets (73 responses), tourism levels (53 responses), and citizen spending power (51 responses). The

top three weaknesses were: infrastructure restrictions (i.e. roads, internet, water, sewer) (72 responses), transportation infrastructure (62 responses), and workforce housing availability (45 responses). Lastly, participants were asked what they felt should be the main attraction when trying to recruit new businesses. The three most popular answers were: health care and social assistance (78 responses), agriculture, forestry, fishing and hunting (65 responses), and arts, entertainment, and recreation (65 responses).

### ADDITIONAL FEEDBACK

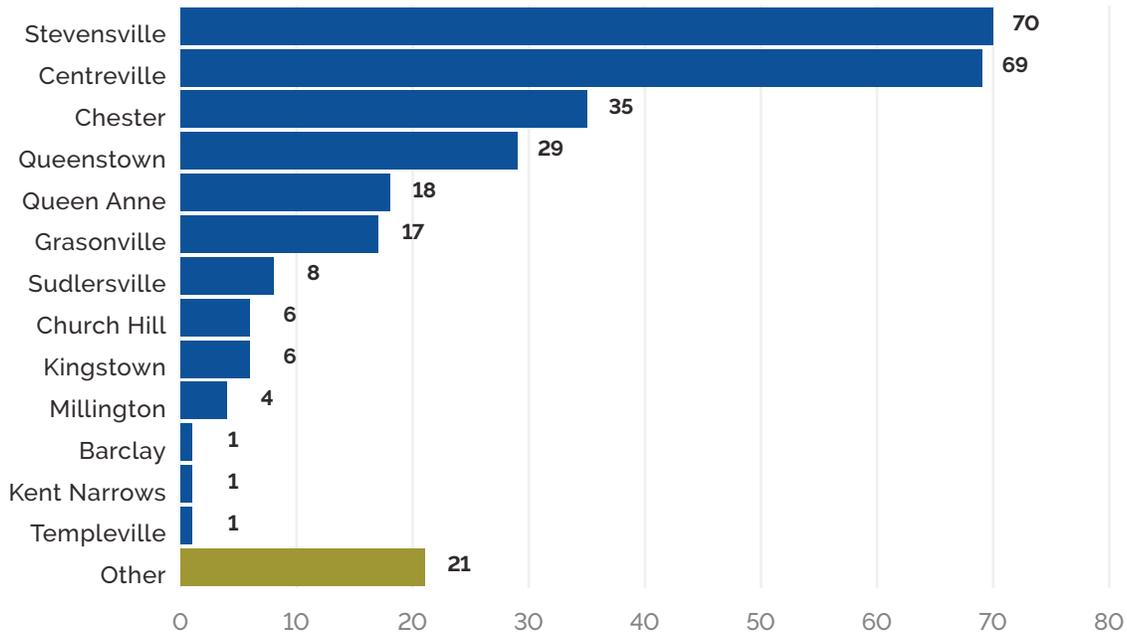
The last question in this survey asked participants to share any additional feedback or comments that could help in the strategic planning process. Many respondents felt that there is an overdevelopment issue within the county (8 responses). Respondents also detailed appreciation for the survey and satisfaction with the EDC (4 responses), an interest in encouraging a strong business community (2 responses), and that the current living conditions on Kent Island are subpar (2 responses).

The following section of this report contains an aggregated summary of all survey responses, listed in the order in which survey questions were asked.



# Survey Results

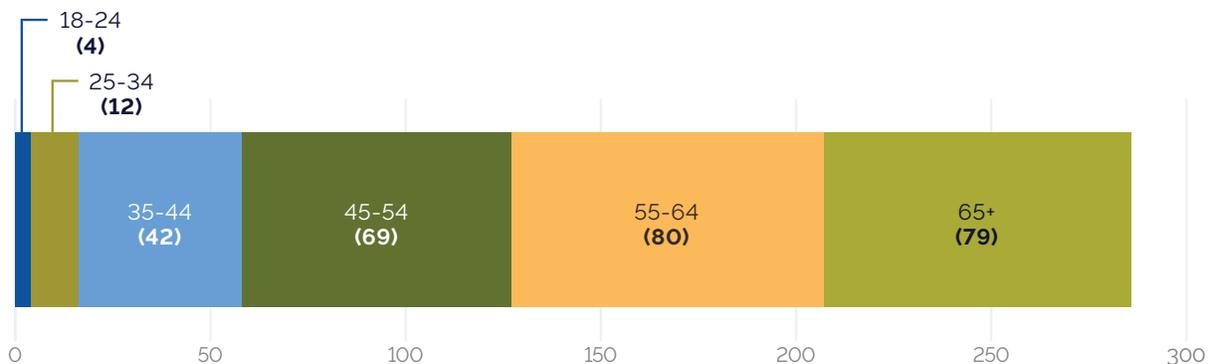
## Where in the county do you live?



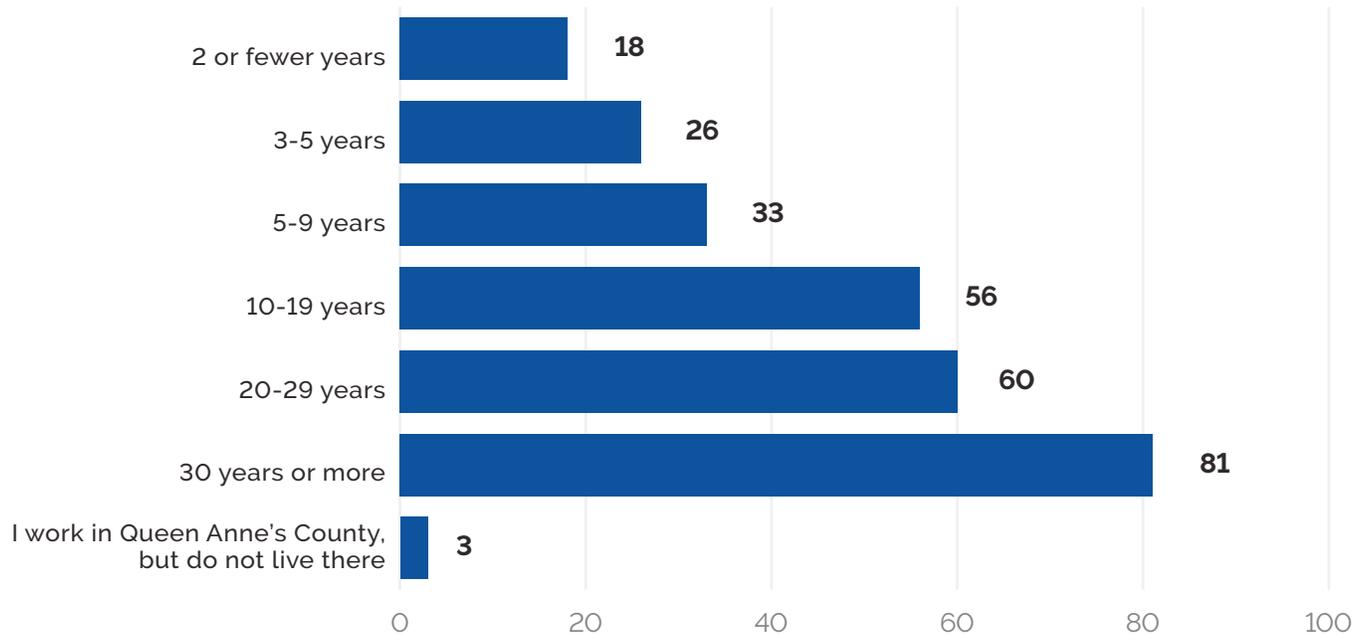
### Other:

- Crumpton (4 responses)
- Chestertown (2 responses)
- Goldsboro
- Kent County near Crumpton
- Kent Point
- Live in Howard County but own in Queen Anne's County
- Pondtown
- Work in-county
- Work in QAC – live elsewhere
- Wye Mills

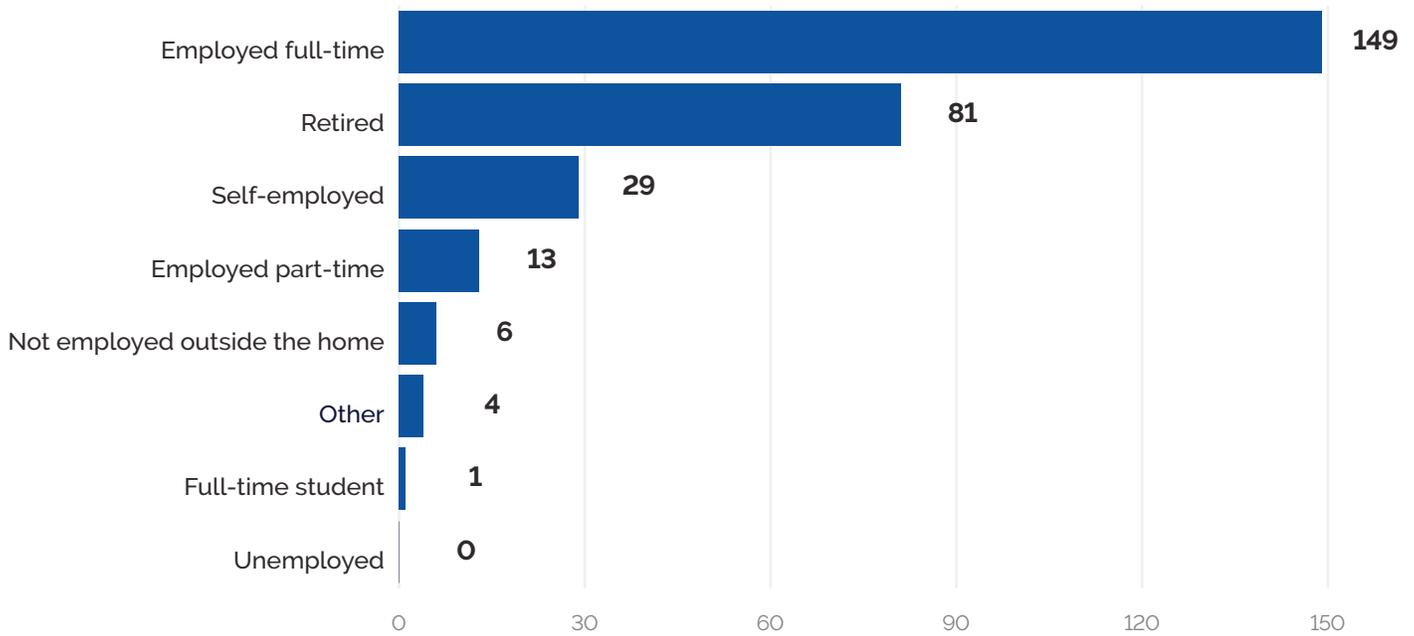
## How old are you?



## How long have you lived in Queen Anne's County?



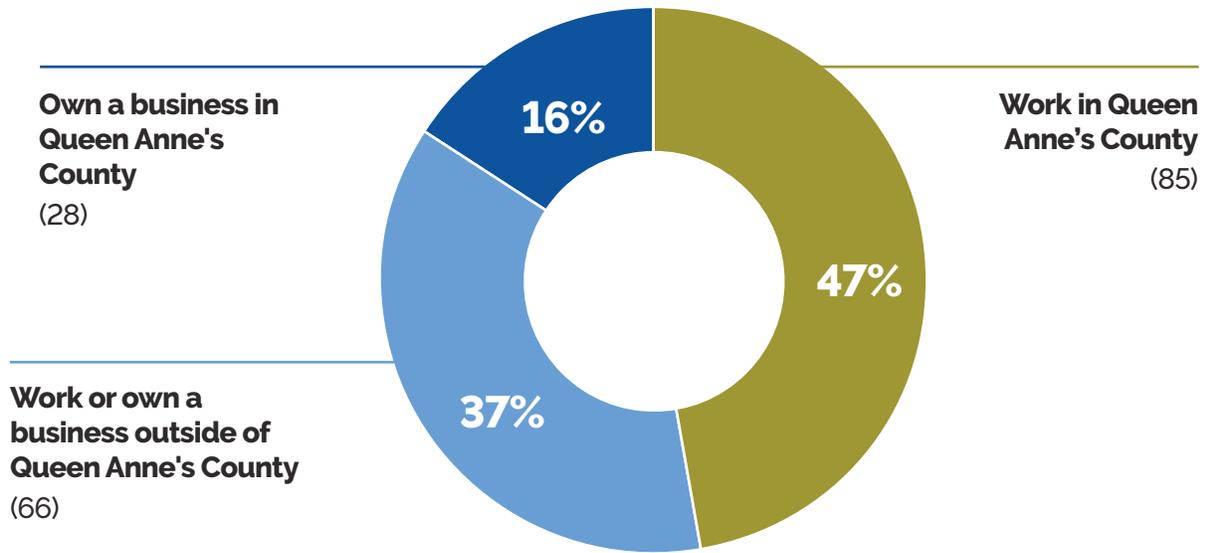
## Are you ...



**Other:**

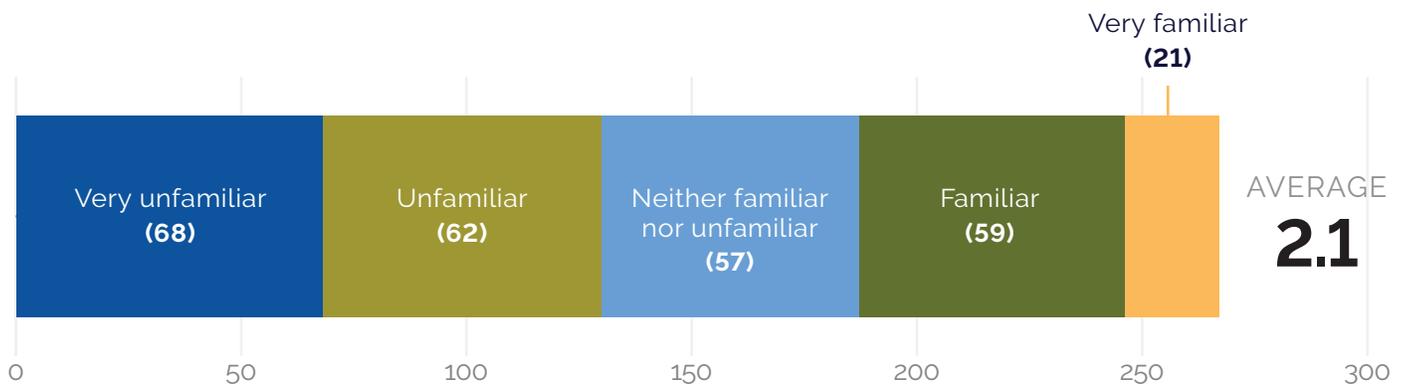
- Disabled Veteran
- Retired but working with non-profits
- Retired but working full-time
- Self-employed plus employed part-time

Do you ...

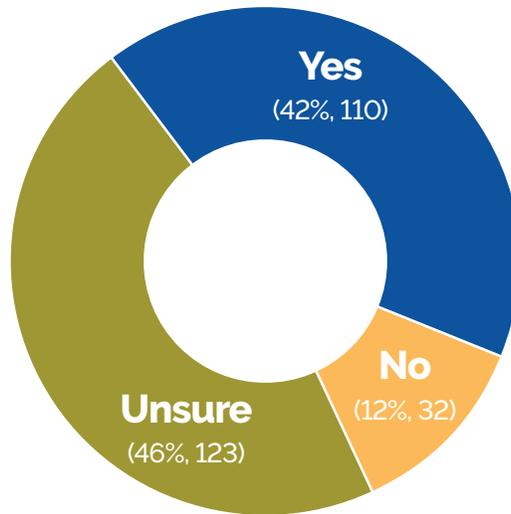


The EDC's current mission, written in 2015, is: "to collaborate with all stakeholders to pursue economically and environmentally sustainable balanced growth opportunities for business, tourism, and agriculture."

How familiar are you with the EDC's initiatives, programs, and services?



**Do you believe this mission statement, as written, is still applicable for the EDC?**

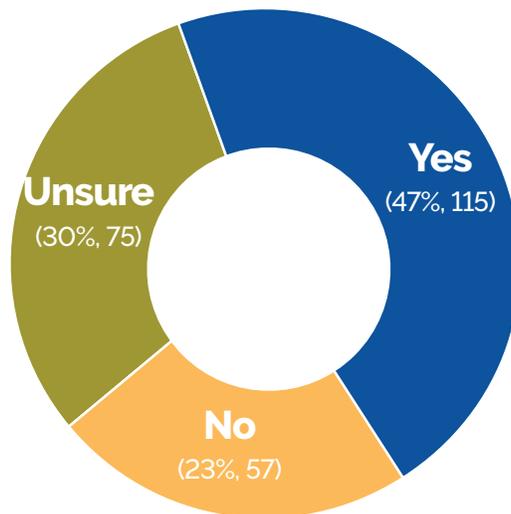


**Do you have any suggestions for changes to the current mission statement?**

- The mission statement does not need to be changed (15 responses)
- Consider all stakeholder needs, specifically residents (10 responses)
- Enforce and elaborate on sustainable economic development (7 responses)
- Ensure environmental protection remain despite development (5 responses)
- Reduce investing in urbanization of the area that leads to residential problems (4 responses)
- Include industries that represent the county's heritage (3 responses)

The EDC's current vision statement is to be "an economically and demographically vibrant community, full of promise for current and future residents and businesses, yet is uncompromisingly dedicated to the preservation of the environment, heritage and rich culture."

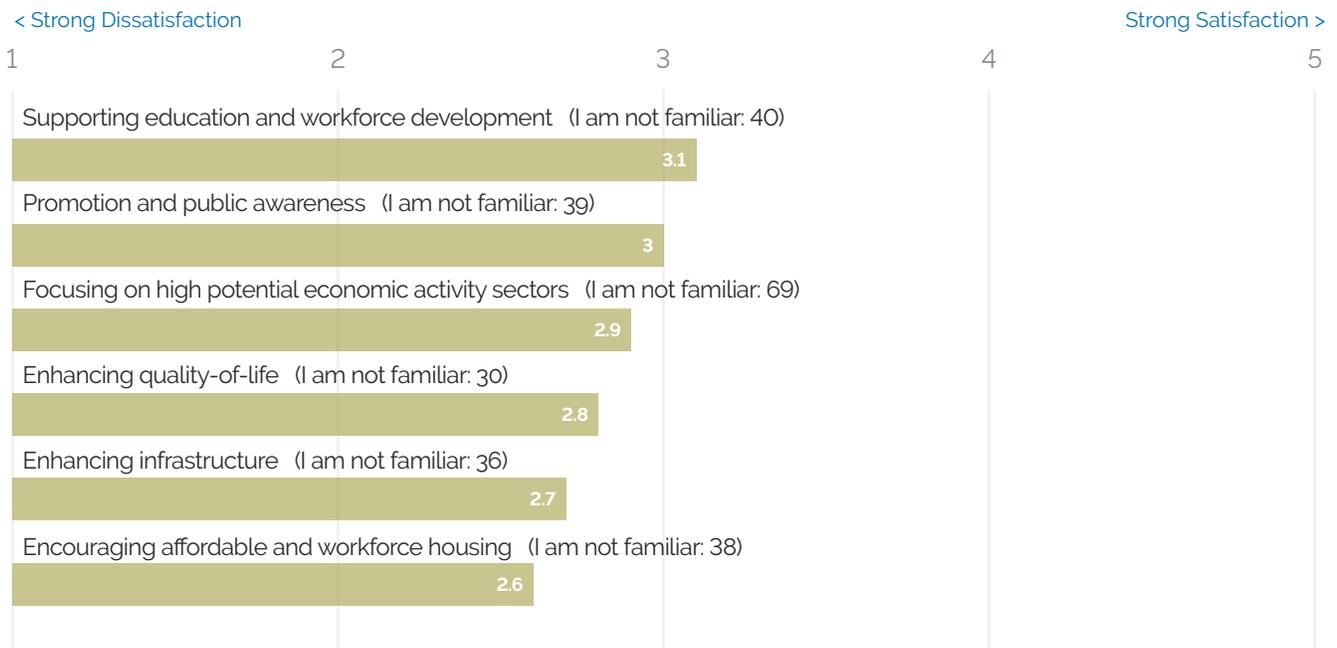
**Do you believe this vision statement, as written, appropriately describes what the EDC strives to achieve in the coming years?**



## Do you have any suggestions for changes to the current vision statement?

- The focus on economic development is hurting the environment (16 responses)
- Nothing needs to be changed (11 responses)
- The consistent development is hurting the county and its residents (10 responses)
- Update the statement to be more specific (9 responses)
- Emphasize the preservation of the county's heritage and community (8 responses)
- The government is not adhering to and acting on the vision (4 responses)
- Reduce restrictions to businesses to allow for responsible economic growth (4 responses)
- Establish consistent growth below the split (3 responses)

The previous strategic action plan for the Queen Anne's County Economic Development Commission was built around six priority areas. Please rate your satisfaction with the EDC's work in these areas. If you are not familiar with the function, please select "I am not familiar."



## FOCUSING ON HIGH POTENTIAL ECONOMIC ACTIVITY SECTORS

- Reduce new building developments in favor of enhancing current infrastructure (16 responses)
  - » Expand where in the county development takes place
  - » Visually pleasing and environmentally conscious
  - » Slow down the development process
- Diversify the incoming businesses to stimulate economy and preserve viability of local businesses (8 responses)
  - » Increase delivery and return options to and from the island
- Increase the available high-paying job sectors (6 responses)
- Prioritize new programs and opportunities to attract and keep businesses (6 responses)
  - » Zoning modifications
- Increase EDC engagement and communication (6 responses)
  - » Provide regular progress reports
  - » Adequate management
  - » Ability to adapt to environmental changes
- Proceed with new projects (3 responses)
- Be more specific with wordage and phrasing (3 responses)
- Develop outdoor attractions (2 responses)
- Unsure of any improvements (2 responses)

## SUPPORTING EDUCATION AND WORKFORCE DEVELOPMENT

- Increase support and relationship with QAC schools and Chesapeake College (6 responses)
- Increase job opportunities that do not require four-year degrees (4 responses)
- Prevent further development of campus-residential buildings (1 response)
- Proactively coordinate with the educational system (1 response)
- Drop common core from QACPS (1 response)
- Satisfied with the workforce development work the ETD is doing (1 response)

## ENHANCING INFRASTRUCTURE

- Improve county resources like transportation, roads, and wastewater treatment facilities (11 responses)
- No improvements necessary (2 responses)
- Not seeing any improvements or growth (2 responses)
- Bay Bridge additional span will negatively impact infrastructure (1 response)
- Increase the capability for economic development (1 response)
- Enhance older infrastructure before developing new buildings (1 response)
- Review existing communities' infrastructure (1 response)

## PROMOTION AND PUBLIC AWARENESS

- Increase awareness through expanded marketing and communications efforts (5 responses)
- Host a conference for the public to ask questions (1 response)
- Increase accessibility of meetings (1 response)
- The county already does a good job (1 response)

## ENCOURAGING AFFORDABLE AND WORKFORCE HOUSING

- Housing marketed as "affordable" is not accurate (10 responses)
  - » Create strategy to provide "affordable" housing options
- Deprioritize development of low-income housing (6 responses)

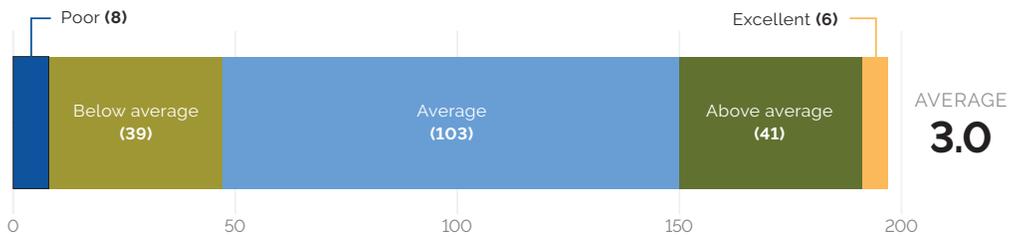
- » There are enough housing options

Develop smart growth strategies (1 response)

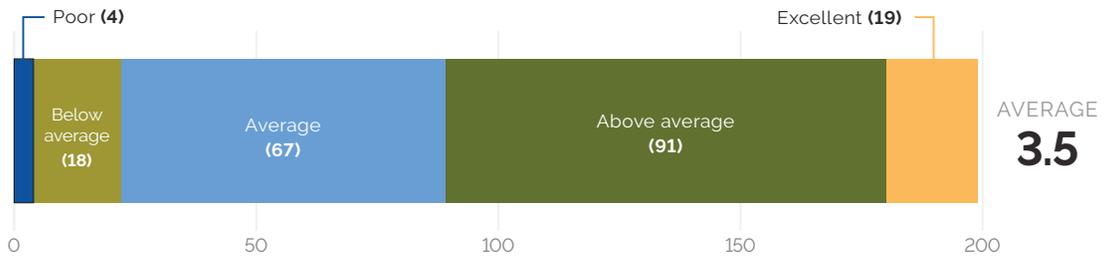
## ENHANCING QUALITY-OF-LIFE

- Develop resources within county limits (11 responses)
  - » Enhance current infrastructure
  - » Beautify outdoor resources
- Decrease urban sprawl and new infrastructure development (5 responses)
- Offer more opportunities for all age groups (3 responses)
  - » Recreational
  - » Seasonal

### How would you rate the overall strength of the business environment in Queen Anne's County?



### All things considered, how would you rate the overall quality of life in Queen Anne's County?

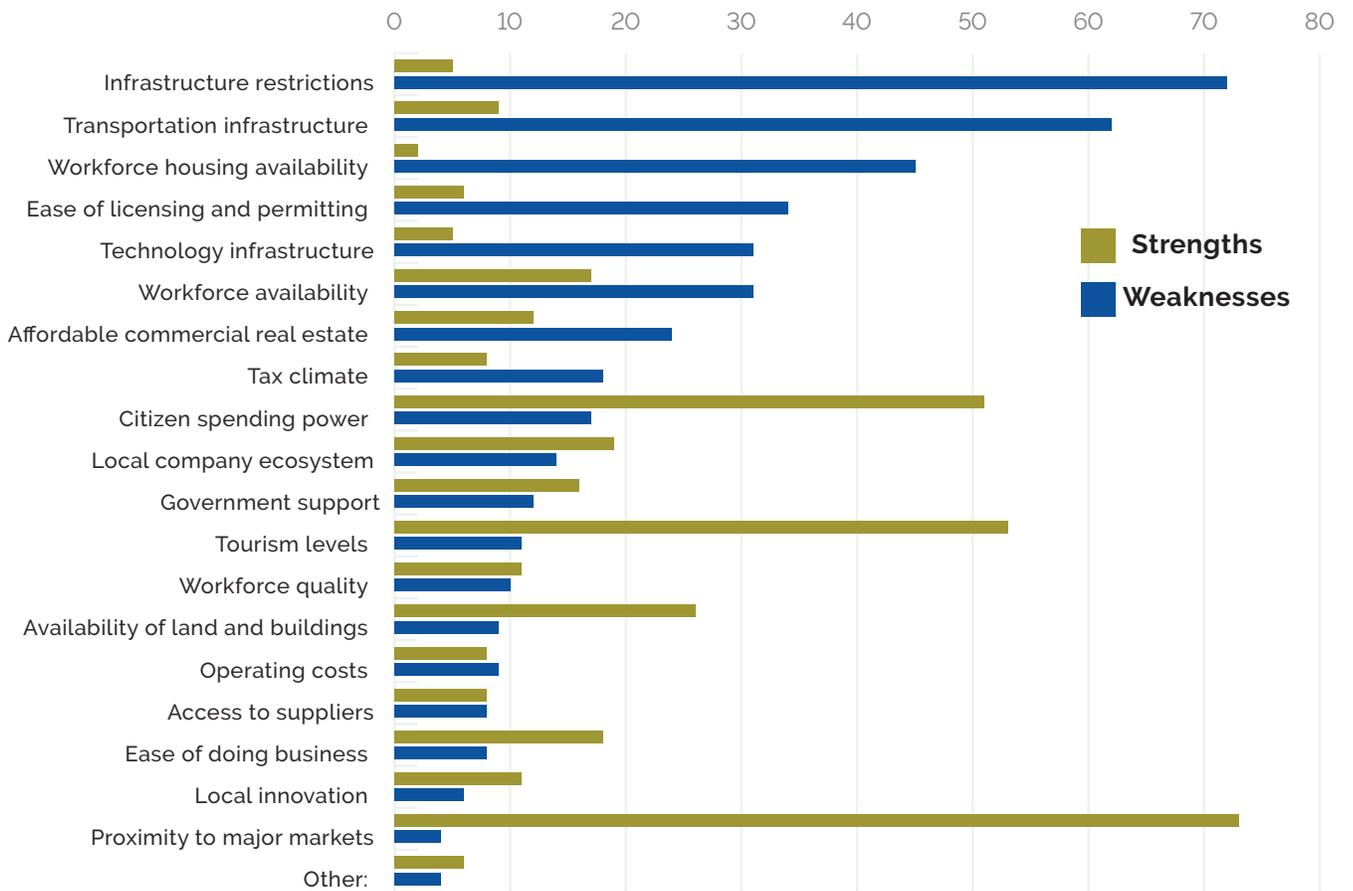


**Have you benefitted from or used any of the following business incentives developed or administered by the EDC? (select all that apply)**

<b>SERVICES</b>	<b>COUNT</b>
Permitting Support	5
Arts & Entertainment District Tax Credits	4
Upper Shore Micro Ag Grant	3
Commercial Property Tax Credit	2
Upper Shore Workforce Investment Board Incumbent Worker Training Fund (IWT)	1
Financing	1
Enterprise Zone Commercial Real Property Tax Credit	0
Enterprise Zone Income Tax Credit	0
Job Creation Tax Credit (JCTC)	0
Economic Development Incentive Fund (EDIF)	0
Site Selection Support	0
Other	13

- Other:
- Have not used any of the listed incentives (6 responses)
  - 2020 Small Business Assistance and Recovery Fund (1 response)
  - 2021 Telework & Online Sales Relief Fund (1 response)
  - Attended seminars (1 response)
  - Entrepreneur Planning and programs (1 response)
  - Higher taxes based off increase of house value (1 response)
  - Remote work grant during Covid-19 (1 response)
  - Unsure of department's ability to execute these incentives (1 response)

**What would you consider Queen Anne's top three strengths and weaknesses as a place to do business? (select up to three that apply)**



**Strengths**

- There are no strengths (2 responses)
- Reasonable and innovative growth (1 response)
- Funding for disabled entrepreneurs (1 response)
- Smart business owners (1 response)
- Quality of life (1 response)

Please provide any further details below:

- Kent Island has the finances to support quality retail but lacks available locations (2 responses)
- There are no strengths (2 responses)

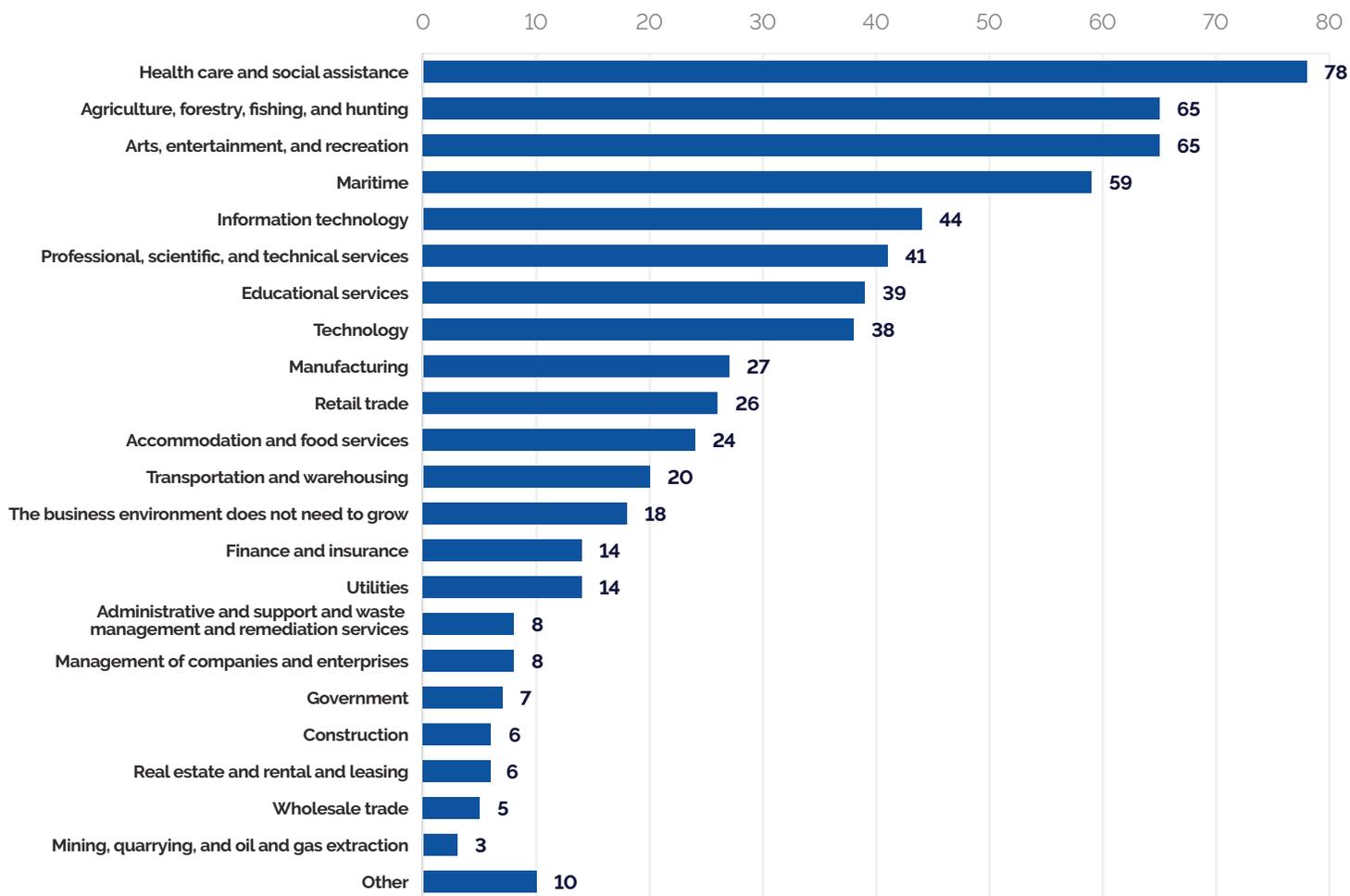
**Weaknesses**

- Dependence on outside resources (1 response)
- Support for new businesses (1 response)
- Healthcare (1 response)
- Traffic (1 response)

Please provide any further details below:

- County has over-prioritized adding new businesses which harms the environment and quality of life (3 responses)
- Process to secure permits is unfair and overcomplicated (3 responses)

**Which of the following industry sectors do you believe Queen Anne's County should focus on when attracting new companies? (select all that apply)**



- Other:
- Increase agritourism (3 responses)
  - Decrease impact on the land and environment (3 responses)
  - Increase number of medical staff (1 response)
  - Invest in a UPS store (1 response)
  - Invest in turf fields for sporting events (1 response)
  - Traffic control (1 response)

**Please provide the name(s) of any other specific industries you think would be a good fit for the commission's economic development efforts:**

- Healthcare (8 responses)
- Environmental and agricultural (7 responses)
- Arts and entertainment (6 responses)
- Information Technology (5 responses)
- Not interested in any more industry (3 responses)

**What 2-4 areas should the EDC invest in over the next 1-7 years to position Queen Anne's County for future economic success?**

- Amenities (15 responses)
- Infrastructure (12 responses)

- Housing (7 responses)
- Technology (7 responses)
- Invest in the county's small towns (6 responses)
- Resources for the younger population (4 responses)
- Communication (3 responses)
- Environmental protection (3 responses)
- Medical Services (3 responses)
- Trades (2 responses)
- Agriculture (2 responses)
- Higher education and workforce development (2 responses)
- Maritime (2 responses)
- Utilizing existing buildings (2 responses)

### **What are some specific ways that the EDC can better support you and/or the community at large?**

- Grow the business community (9 responses)
  - » Medical
  - » Technology
  - » Retail
- Limit development (7 responses)
- Preserve the current state of the county and its community (7 responses)
- Communication (5 responses)
- Infrastructure improvements (5 responses)
  - » Side walks
  - » Overpass
  - » Reliable broadband
- More options for younger residents (4 responses)
- Find new ways to increase the quality of life (3 responses)
- Housing options (3 responses)
- Assist small business owners (2 responses)
- Better zoning decisions (2 responses)
- Provide entertainment options (2 responses)
- The EDC does a great job (2 responses)

### **Please provide any additional feedback or comments that would be helpful to the strategic planning process.**

- Overdevelopment is a big problem (8 responses)
- Appreciate the survey and satisfied with the EDC (4 responses)
- Current living conditions on Kent Island are not enjoyable (2 responses)
- Encourage a stronger business community (2 responses)



# Survey Instrument

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# QUEEN ANNE'S COUNTY ECONOMIC & TOURISM DEVELOPMENT COMMUNITY SURVEY

Thank you for participating in this survey on behalf of **Queen Anne's County Department of Economic & Tourism Development (QACETD)**. This survey is being conducted as part of the strategic planning process for the department's Economic Development Commission's (EDC), the advisory board for QACETD. The survey is meant to gather information on how the EDC and the county's Department of Economic & Tourism Development can work to best meet the needs of those who live and work in the county in the coming years and to gather the public's perspectives on the priorities and investments that should guide the EDC.

Please be honest and forthcoming in your responses, which are anonymous. Your responses will go straight to the third-party consulting team working with the county and will only be reported in summary form. This survey should take about 10 minutes to complete. If you have any questions about the survey or would like to discuss your responses in greater detail with a member of the Queen Anne's County team, please contact Rebecca Clark at [rclark@qac.com](mailto:rclark@qac.com).

Thank you for taking part in this important effort.

1. Where in the county do you live?

- |                                      |                                       |                                     |                                       |   |
|--------------------------------------|---------------------------------------|-------------------------------------|---------------------------------------|---|
| <input type="checkbox"/> Barclay     | <input type="checkbox"/> Church Hill  | <input type="checkbox"/> Kingstown  | <input type="checkbox"/> Queenstown   | <input type="checkbox"/> Templeville                          |
| <input type="checkbox"/> Centreville | <input type="checkbox"/> Grasonville  | <input type="checkbox"/> Millington | <input type="checkbox"/> Stevensville | <input type="checkbox"/> Other unincorporated area            |
| <input type="checkbox"/> Chester     | <input type="checkbox"/> Kent Narrows | <input type="checkbox"/> Queen Anne | <input type="checkbox"/> Sudlersville | <input type="checkbox"/> I do not live in Queen Anne's County |

2. How old are you?

- |                                |                                |                                      |
|--------------------------------|--------------------------------|--------------------------------------|
| <input type="checkbox"/> 18-24 | <input type="checkbox"/> 35-44 | <input type="checkbox"/> 55-64       |
| <input type="checkbox"/> 25-34 | <input type="checkbox"/> 45-54 | <input type="checkbox"/> 65 or older |

3. How long have you lived in Queen Anne's County?

- |   |                                      |   |   |
|---|--------------------------------------|---|---|
| <input type="checkbox"/> 2 or fewer years | <input type="checkbox"/> 5-9 years   | <input type="checkbox"/> 20-29 years      | <input type="checkbox"/> I work in Queen Anne's |
| <input type="checkbox"/> 3-5 years        | <input type="checkbox"/> 10-19 years | <input type="checkbox"/> 30 years or more | County, but do not live there                   |

4. Are you...

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Employed full-time | <input type="checkbox"/> Not employed outside the home (homemakers, etc.) | <input type="checkbox"/> Full-time student – not working |
| <input type="checkbox"/> Employed part-time | <input type="checkbox"/> Retired  | <input type="checkbox"/> Unemployed                      |
| <input type="checkbox"/> Self-employed      | <input type="checkbox"/> Other (specify): _____                           |  |

*If Employed full-time, Employed part-time, or Self-employed is NOT selected above, skip to Question 6:*

5. Do you ...

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Work in Queen Anne's County | <input type="checkbox"/> Work or own a business outside of Queen Anne's County | <input type="checkbox"/> Own a business in Queen Anne's County |
|--|--|--|

## MISSION & VISION

6. The EDC's current mission, written in 2015, is: "To collaborate with all stakeholders to pursue economically and environmentally sustainable balanced growth opportunities for business, tourism, and agriculture."

How familiar are you with the EDC's initiatives, programs, and services?

- |  |                                     |  |                                   |  |
|--|-------------------------------------|--|-----------------------------------|--|
| <input type="checkbox"/> Very unfamiliar | <input type="checkbox"/> Unfamiliar | <input type="checkbox"/> Neither familiar nor unfamiliar | <input type="checkbox"/> Familiar | <input type="checkbox"/> Very familiar |
|--|-------------------------------------|--|-----------------------------------|--|

7. Do you believe this mission statement, as written, is still applicable for the EDC?

- |                              |                             |                                 |
|------------------------------|-----------------------------|---------------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Unsure |
|------------------------------|-----------------------------|---------------------------------|

8. Do you have any suggestions for changes to the current mission statement?
9. The EDC’s current vision statement is to be “An economically and demographically vibrant community, full of promise for current and future residents and businesses, yet is uncompromisingly dedicated to the preservation of the environment, heritage and rich culture.”
- Do you believe this vision statement, as written, appropriately describes what the EDC strives to achieve in the coming years?
- Yes       No       Unsure
10. Do you have any suggestions for changes to the current vision statement?

**STRATEGIC PLANNING**

11. The previous strategic action plan for the Queen Anne’s County Economic Development Commission was built around six priority areas. Please rate your satisfaction with the EDC’s work in these areas. If you are not familiar with the function, please select “I am not familiar.”

	HIGHLY DISSATISFIED	DISSATISFIED	NEUTRAL	SATISFIED	HIGHLY SATISFIED	I AM NOT FAMILIAR
<b>Focusing on High Potential Economic Activity Sectors</b>						
<b>Supporting Education and Workforce Development</b>						
<b>Enhancing Infrastructure</b>						
<b>Promotion and Public Awareness</b>						
<b>Encouraging Affordable and Workforce Housing</b>						
<b>Enhancing Quality-Of-Life</b>						

What specific ideas do you have for how the EDC can continue to improve in these areas?

	COMMENTS
<b>Focusing on High Potential Economic Activity Sectors</b>	
<b>Supporting Education and Workforce Development</b>	
<b>Enhancing Infrastructure</b>	
<b>Promotion and Public Awareness</b>	
<b>Encouraging Affordable and Workforce Housing</b>	
<b>Enhancing Quality-Of-Life</b>	

12. How would you rate the overall strength of the business environment in Queen Anne's County?

- Poor       Below average       Average       Above average       Excellent

13. All things considered, how would you rate the overall quality of life in Queen Anne's County?

- Poor       Below average       Average       Above average       Excellent

### ECONOMIC DEVELOPMENT

14. Have you benefitted from or used any of the following business incentives developed or administered by the EDC? (Select all that apply)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Arts & Entertainment District Tax Credits           | <input type="checkbox"/> Job Creation Tax Credit (JCTC)             | <input type="checkbox"/> Upper Shore Workforce Investment Board Incumbent Worker Training Fund (IWTF) |
| <input type="checkbox"/> Commercial Property Tax Credit                      | <input type="checkbox"/> Economic Development Incentive Fund (EDIF) | <input type="checkbox"/> Site Selection support   |
| <input type="checkbox"/> Enterprise Zone Commercial Real Property Tax Credit | <input type="checkbox"/> Economic Development Incentive Fund (EDIF) | <input type="checkbox"/> Financing  |
| <input type="checkbox"/> Enterprise Zone Income Tax Credit                   | <input type="checkbox"/> Upper Shore Micro Ag Grant                 | <input type="checkbox"/> Permitting Support   |
|  |   | <input type="checkbox"/> Other : _____  |
|  |   | <input type="checkbox"/> None of the above  |

15. What would you consider Queen Anne's top three strengths as a place to do business? (Select up to three that apply)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Access to suppliers                           | <input type="checkbox"/> Infrastructure restrictions (i.e. roads, internet, water, sewer) | <input type="checkbox"/> Technology infrastructure      |
| <input type="checkbox"/> Affordable commercial real estate             | <input type="checkbox"/> Local company ecosystem (presence of clusters or key players)    | <input type="checkbox"/> Tourism levels                 |
| <input type="checkbox"/> Availability of land and buildings            | <input type="checkbox"/> Local innovation   | <input type="checkbox"/> Transportation infrastructure  |
| <input type="checkbox"/> Citizen spending power                        | <input type="checkbox"/> Operating costs  | <input type="checkbox"/> Workforce availability         |
| <input type="checkbox"/> Ease of doing business                        | <input type="checkbox"/> Proximity to major markets                                       | <input type="checkbox"/> Workforce housing availability |
| <input type="checkbox"/> Ease of licensing and permitting              | <input type="checkbox"/> Tax climate  | <input type="checkbox"/> Workforce quality              |
| <input type="checkbox"/> Government support (includes local and state) |   | <input type="checkbox"/> Other: _____                   |

16. Please provide any further details below:

17. What would you consider Queen Anne's top three weaknesses as a place to do business? (Select up to three that apply)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Access to suppliers                           | <input type="checkbox"/> Infrastructure restrictions (i.e. roads, internet, water, sewer) | <input type="checkbox"/> Technology infrastructure      |
| <input type="checkbox"/> Affordable commercial real estate             | <input type="checkbox"/> Local company ecosystem (presence of clusters or key players)    | <input type="checkbox"/> Tourism levels                 |
| <input type="checkbox"/> Availability of land and buildings            | <input type="checkbox"/> Local innovation   | <input type="checkbox"/> Transportation infrastructure  |
| <input type="checkbox"/> Citizen spending power                        | <input type="checkbox"/> Operating costs  | <input type="checkbox"/> Workforce availability         |
| <input type="checkbox"/> Ease of doing business                        | <input type="checkbox"/> Proximity to major markets                                       | <input type="checkbox"/> Workforce housing availability |
| <input type="checkbox"/> Ease of licensing and permitting              | <input type="checkbox"/> Tax climate  | <input type="checkbox"/> Workforce quality              |
| <input type="checkbox"/> Government support (includes local and state) |   | <input type="checkbox"/> Other: _____                   |

18. Please provide any further details below:

19. Which of the following industry sectors do you believe Queen Anne’s County should focus on when attracting new companies?

(Select all that apply)

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Accommodation and Food Services  | <input type="checkbox"/> Health Care and Social Assistance                | <input type="checkbox"/> Retail Trade                                   |
| <input type="checkbox"/> Administrative and Support and Waste Management and Remediation Services | <input type="checkbox"/> Information Technology                           | <input type="checkbox"/> Technology                                     |
| <input type="checkbox"/> Agriculture, Forestry, Fishing and Hunting                               | <input type="checkbox"/> Management of Companies and Enterprises          | <input type="checkbox"/> Transportation and Warehousing                 |
| <input type="checkbox"/> Arts, Entertainment, and Recreation                                      | <input type="checkbox"/> Manufacturing                                    | <input type="checkbox"/> Utilities                                      |
| <input type="checkbox"/> Construction   | <input type="checkbox"/> Maritime   | <input type="checkbox"/> Wholesale Trade                                |
| <input type="checkbox"/> Educational Services   | <input type="checkbox"/> Mining, Quarrying, and Oil and Gas Extraction    | <input type="checkbox"/> Other: _____                                   |
| <input type="checkbox"/> Finance and Insurance  | <input type="checkbox"/> Professional, Scientific, and Technical Services | <input type="checkbox"/> The business environment does not need to grow |
| <input type="checkbox"/> Government   | <input type="checkbox"/> Real Estate and Rental and Leasing               |   |

20. Please provide additional details about why selected these industries:

21. What 2-4 areas should the EDC invest in over the next 1-7 years to position Queen Anne’s County for future economic success?

22. What are some specific ways that the EDC can better support you and/or the community at large?

**OPTIONAL:** If you would like to speak with a member of the EDC team about your business needs, please provide your contact information below and a member of their team will reach out to you:

**Name:** \_\_\_\_\_

**Business name:** \_\_\_\_\_

**Phone number:** \_\_\_\_\_

**Email address:** \_\_\_\_\_

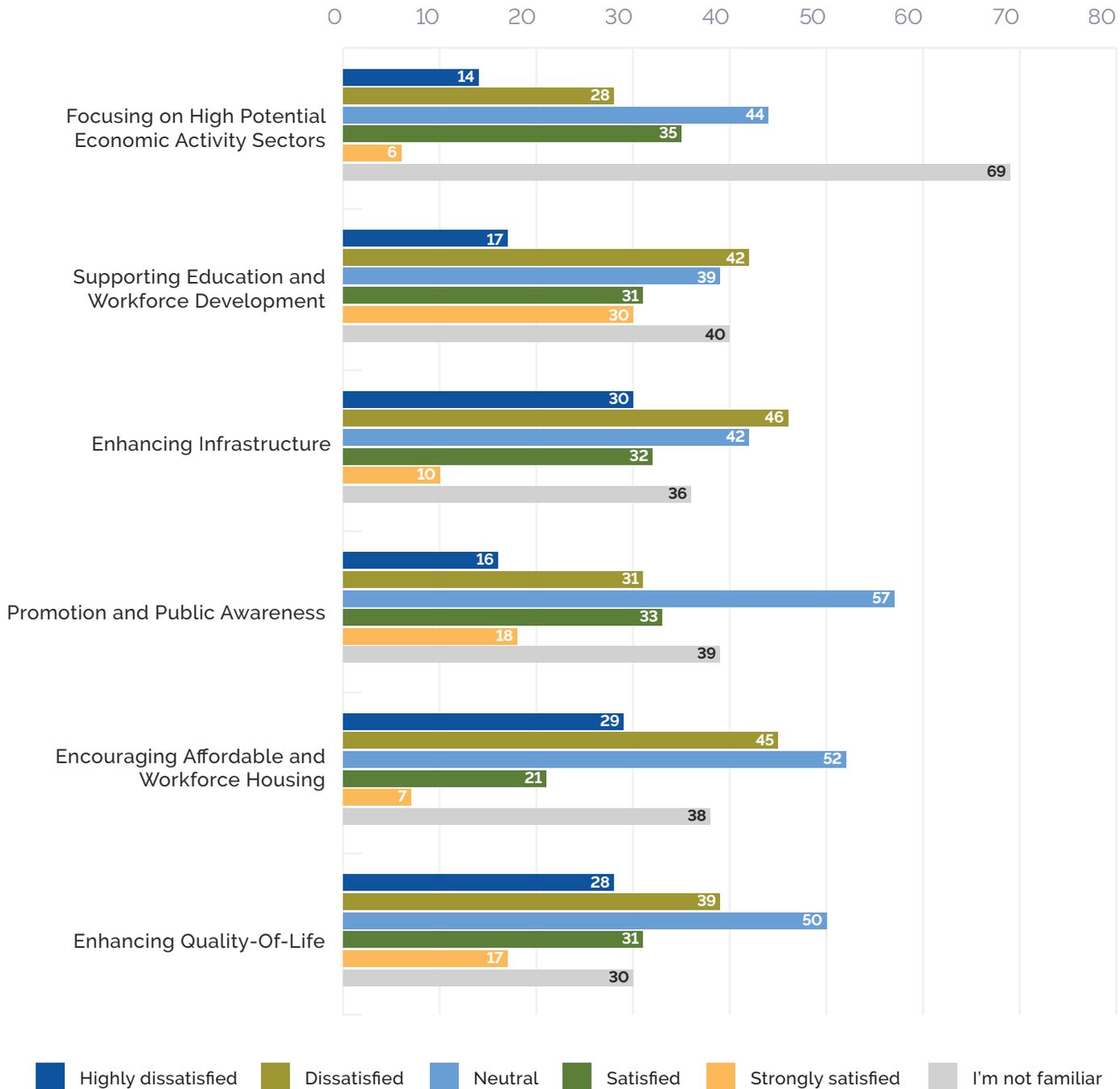
**ADDITIONAL FEEDBACK**

23. Please provide any additional feedback or comments that would be helpful to the strategic planning process.

**Thank you for your participation!**

# Additional Data

12. The previous strategic action plan for the Queen Anne's County Economic Development Commission was built around six priority areas. Please rate your satisfaction with the EDC's work in these areas. If you are not familiar with the function, please select "I am not familiar."



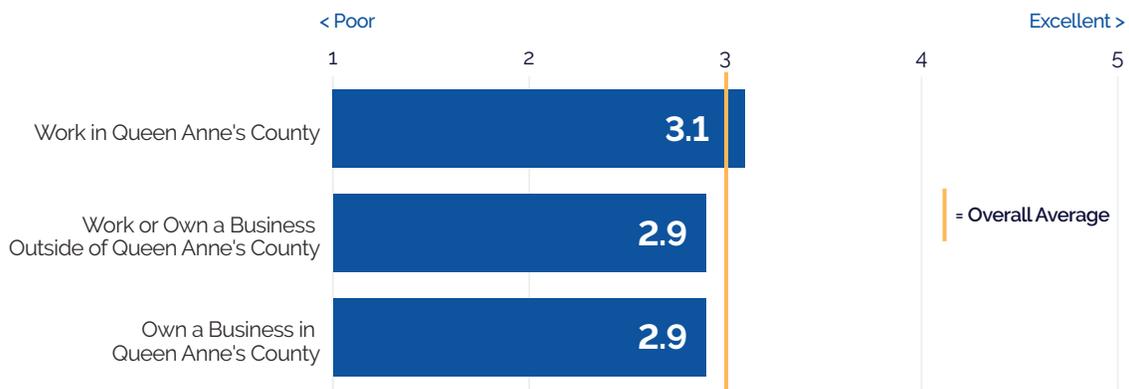
**How familiar are you with the EDC's initiatives, programs, and services?  
(BY WORKING LOCATION)**



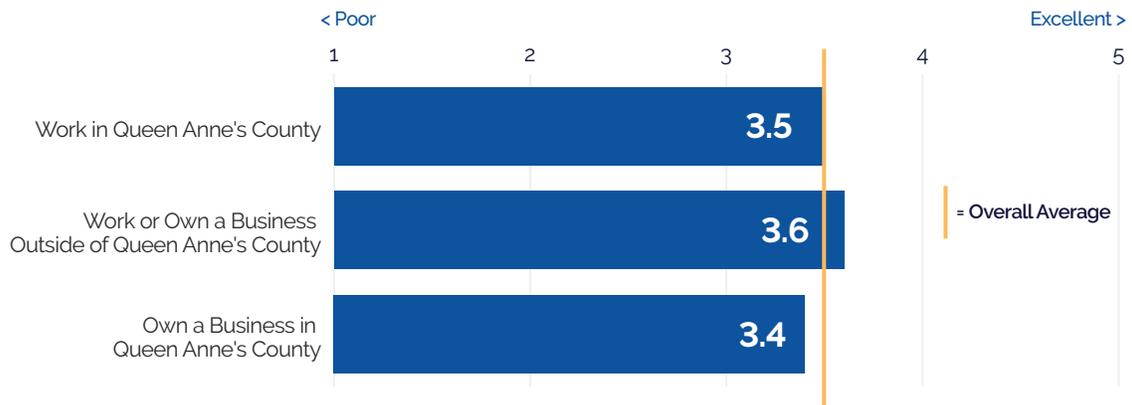
**The previous strategic action plan for the Queen Anne's County Economic Development Commission was built around six priority areas. Please rate your satisfaction with the EDC's work in these areas. (BY WORKING LOCATION)**



**How would you rate the overall strength of the business environment in Queen Anne's County? (BY WORKING LOCATION)**



**All things considered, how would you rate the overall quality of life in Queen Anne's County?  
(BY WORKING LOCATION)**







# APPENDIX C: Data Analysis

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# Introduction

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In early 2024, The Queen Anne's County Department of Economic and Tourism Development (ETD) engaged Emergent Method, an external consulting firm, in a five-year economic development strategic planning process. As part of this process, a comprehensive data request was fulfilled by the ETD, and extensive desk research on relevant economic, workforce, and community factors took place. This information was synthesized, analyzed, and summarized in this report. The historic, current, and forecasted data included will be leveraged in conjunction with the 2022 Comprehensive Plan and the Industry Competitiveness Analysis & Strategic Asset Evaluation to guide the development of the Economic Development Strategic Action Plan.

## DATA INPUTS

Local data sources were provided by the Department of Economic and Tourism Development which provided unique insights into the county's economic landscape. Data included land use and zoning data to understand available zones and sites, along with relevant zoning changes. Other relevant reports and analysis were shared to inform this data analysis including the Housing Strategy and Industry Competitiveness Analysis & Strategic Asset Evaluation Report. Regional and state-level economic trends served as an additional layer of input, contextualizing the factors of Queen Anne's County and its strengths. Federal data primarily were used to understand broader trends and patterns in the county.

## Executive Summary

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Employment in Queen Anne's County is primarily driven by Government and service or hospitality-oriented careers – Accommodation and Food Services and Retail Trade. The overall job market recovered rapidly after the COVID-19 pandemic and is projected to grow steadily in the future. Sectors and industries driving this projected growth include Government, Manufacturing, and Educational Services. Historical job growth was driven by Information, Management of Companies and Enterprises, and Transportation and Warehousing. These data are in line with the Industry Competitiveness Analysis & Strategic Asset Evaluation Report – the county is poised for growth in manufacturing and still maintains a low employment location quotient for Information employment creating additional room for growth. Looking closer at the labor force in the county, overall participation rates have been generally falling, at the same time, unemployment rates have been declining. A potential driver of this tight labor market is the county's aging population, the median age of the county has been steadily increasing over the past 10 years. Queen Anne's County residents tend to be highly educated with nearly half of the population having a college degree.

Beyond this, residents tend to be overeducated in comparison to job opportunities in the county. The commercial real estate landscape in the county is robust yet concentrated heavily in Kent Island. Changes to this landscape are anticipated given the review and refinement of zoning and subdivision regulations included in the county's 2022 comprehensive plan. With year-over-year increases in median home prices, housing affordability has become a prominent concern in the county. Increasing prices coupled with a significant decline in the available housing stock has led to a tight, and often inaccessible housing market. Median household wages in the county have been increasing at a steady pace, and are the highest on the Eastern Shore, but this ranking is matched by the highest cost of living index on the Eastern Shore.

## Industry Cluster Analysis

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A comprehensive Industry Competitiveness Analysis & Strategic Asset Evaluation Report was completed prior to this report. Through that effort, seven target industry sectors were identified for Queen Anne's County. These industries are Professional Services, Manufacturing and Wholesale Trade, Construction, Tourism and Hospitality, Healthcare, Transportation and Warehousing, and Agriculture. The data analyzed in this report supports these findings, further highlighting the opportunities available in these sectors and the county's positioning to pursue development in these sectors.

# Economic Diversity

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Economic diversity measures the degree to which a region – county, city, state, or country – relies on a broad mix of industries. Low levels of economic diversity are present when a region is predominantly dependent on a limited number of industries or economic activities. More economically diverse regions tend to be more stable and better positioned to support economic development.<sup>1</sup>

In 2023, there was a total on 18,347 jobs in Queen Anne's County. Over the past six years, the average annual growth rate in jobs was just under one percent (0.9%), however this number is skewed by the drop in employment in 2020 due to the COVID-19 pandemic. Looking instead at overall growth, the job market has grown by 2.5% since 2018, and it is projected to grow steadily in the future. Queen Anne's County jobs are dispersed across 20 distinct sectors, defined as follows:

- **Accommodation and Food Services:** This sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.
- **Administrative and Support and Waste Management and Remediation Services:** This sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households.
- **Agriculture, Forestry, Fishing and Hunting:** This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats. The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries
- **Arts, Entertainment, and Recreation:** This sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.
- **Construction:** This sector comprises establishments primarily engaged in the construction of buildings or engineering projects. Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector. Construction work done may include new work, additions, alterations, or maintenance and repairs.
- **Educational Services:** This sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and/or accommodation services to their students.
- **Finance and Insurance:** This sector comprises establishments primarily engaged in financial transactions and/or in facilitating financial transactions. Three principal types of activities are identified: Raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities; pooling of risk by underwriting insurance and annuities; and providing specialized services facilitating or supporting financial intermediation, insurance, and employee benefit programs.

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<sup>1</sup> <https://www.chmura.com/blog/chmura-economic-diversity#:~:text=Economic%20diversity%20measures%20the%20degree,broad%20mix%20of%20economic%20activities>

- **Health Care and Social Assistance:** This sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labor inputs of health practitioners or social workers with the requisite expertise.
- **Information:** This sector comprises establishments engaged in the following processes: producing and distributing information and cultural products, providing the means to transmit or distribute these products as well as data or communications, and processing data. The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; Web search portals, data processing industries, and the information services industries.
- **Management of Companies and Enterprises:** The Management of Companies and Enterprises sector comprises establishments that hold the securities of companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision making role of the company or enterprise.
- **Manufacturing:** This sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector.
- **Mining, Quarrying, and Oil and Gas Extraction:** The Mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.
- **Other Services (except Public Administration):** This sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.
- **Professional, Scientific, and Technical Services:** The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households.
- **Public Administration:** This sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area. These agencies also set policy, create laws, adjudicate civil and criminal legal cases, and provide for public safety and for national defense. In general, government establishments in the Public Administration sector oversee governmental programs and activities that are not performed by

private establishments. Establishments in this sector typically are engaged in the organization and financing of the production of public goods and services, most of which are provided for free or at prices that are not economically significant.

- **Real Estate and Rental and Leasing:** The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks. This sector also includes establishments primarily engaged in managing real estate for others, selling, renting and/or buying real estate for others, and appraising real estate.
- **Retail Trade:** This sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and nonstore retailers.
- **Transportation and Warehousing:** This sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.
- **Utilities:** This sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.
- **Wholesale Trade:** This sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing. The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale (i.e., goods sold to other wholesalers or retailers), (b) capital or durable nonconsumer goods, and (c) raw and intermediate materials and supplies used in production.

The largest sectors in terms of total jobs include Accommodation and Food Services, Government, and Retail Trade. These three sectors combined make up 43.8% of all jobs in the county. These sectors all have an employment concentration of 1.20 or higher – indicated a higher concentration of these jobs in Queen Anne’s County than the average countywide concentration. The remaining 17 sectors make up between 0.1% and 7.9% each of the total jobs in Queen Anne’s County.

Drilling down further to specific industries, the 18,347 jobs in Queen Anne’s County are spread across 442 industries. The industries with the highest number of jobs in Queen Anne’s County include Local Government and Restaurants, specifically Elementary and Secondary Schools (Local Government), Full-Service Restaurants, Colleges, Universities, and Professional Schools (Local Government), Limited-Service Restaurants, and Local Government (Excluding Education and Hospitals). In total, these industries accounted for 4,579 of the jobs in 2023, or 25% of all jobs in the county.

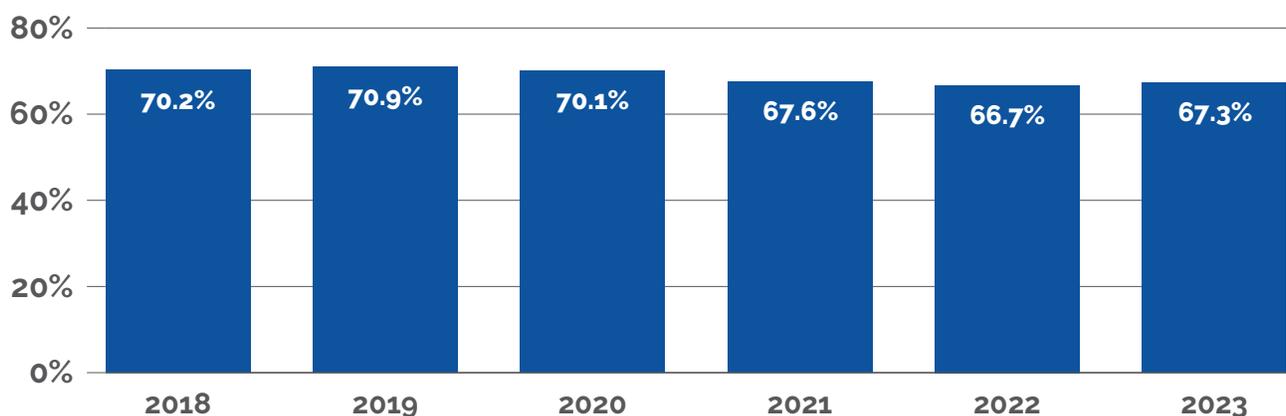
While there have been steady declines in Elementary and Secondary School and Full-Service Restaurants employment over the past 6 years, employment in Colleges, Universities, and Professional Schools and Limited-Service Restaurants has grown. These industries are defined as follows:

- **Elementary and Secondary Schools:** This industry comprises establishments primarily engaged in furnishing academic courses and associated course work that comprise a basic preparatory education. A basic preparatory education ordinarily constitutes kindergarten through 12th grade. This industry includes school boards and school districts.
- **Full-Service Restaurants:** This industry comprises establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. These establishments may provide this type of food service to patrons in combination with selling alcoholic beverages, providing carryout services, or presenting live nontheatrical entertainment.
- **Colleges, Universities, and Professional Schools:** This industry comprises establishments primarily engaged in furnishing academic courses and granting degrees at baccalaureate or graduate levels. The requirement for admission is at least a high school diploma or equivalent general academic training. Instruction may be provided in diverse settings, such as the establishment's or client's training facilities, educational institutions, the workplace, or the home, and through diverse means, such as correspondence, television, the Internet, or other electronic and distance-learning methods.
- **Limited-Service Restaurants:** This industry comprises establishments primarily engaged in providing food services (except snack and nonalcoholic beverage bars) where patrons generally order or select items and pay before eating. Food and drink may be consumed on premises, taken out, or delivered to the customer's location. Some establishments in this industry may provide these food services in combination with selling alcoholic beverages.

## Workforce and Occupational Diversity

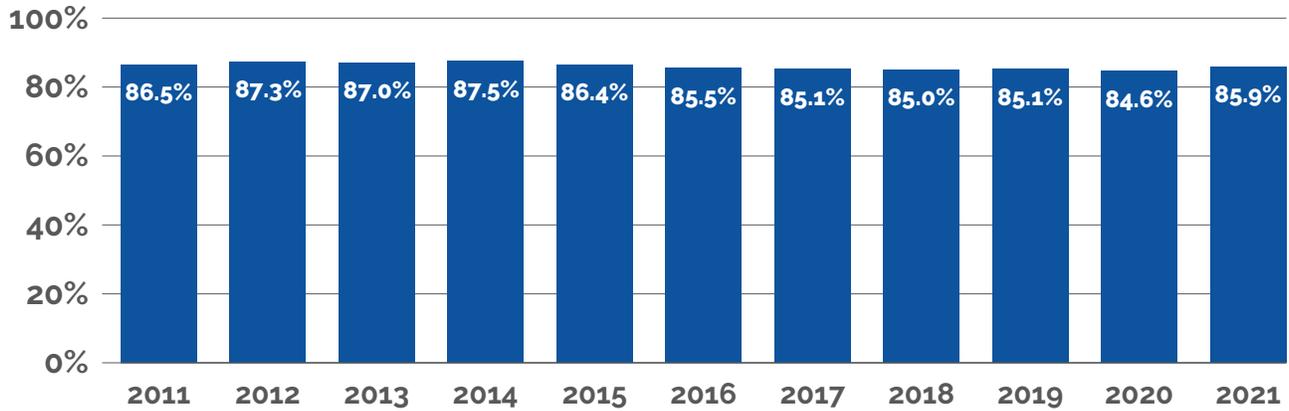
As of December 2023, the total population of Queen Anne's County was 52,041 people, and the labor force was 28,446. This represents a 67.3% participation rate of the eligible population in the labor force, a rate that has been generally declining over the past 5 years. As shown in the table below, the 2023 labor force participation was the lowest seen in Queen Anne's County over the past 5 years. Prime-age labor force participation has been steadier over a broader time period – this considers only the civilian population aged 25 to 54. Total jobs in the county have increased over this same time period, from 17,908 in 2018 to 18,347 in 2023.

### Labor Force Participation Rates (2018-2023)



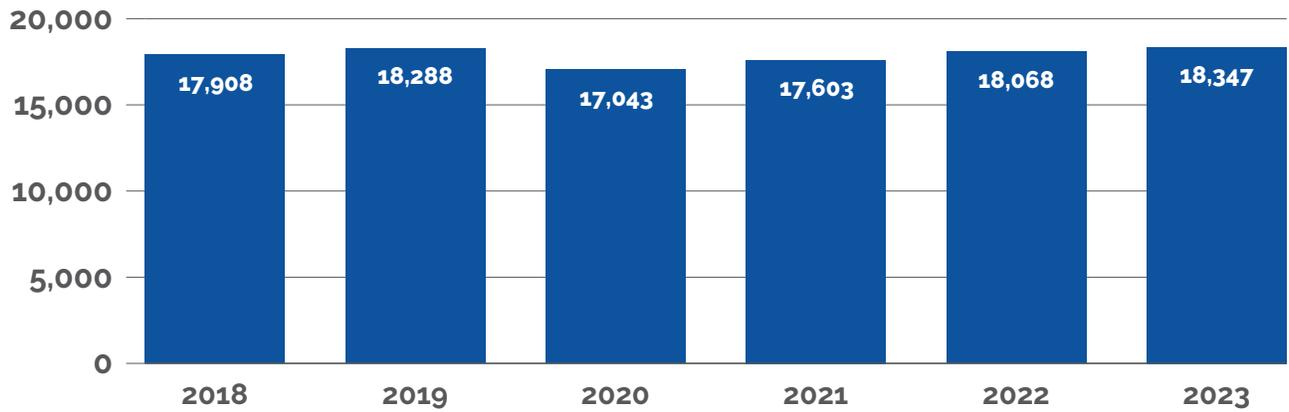
Source: Lightcast

## Prime Labor Force Participation Rates (2011-2021)



Source: US Census Bureau

## Total Jobs in Queen Anne's County (2018-2023)

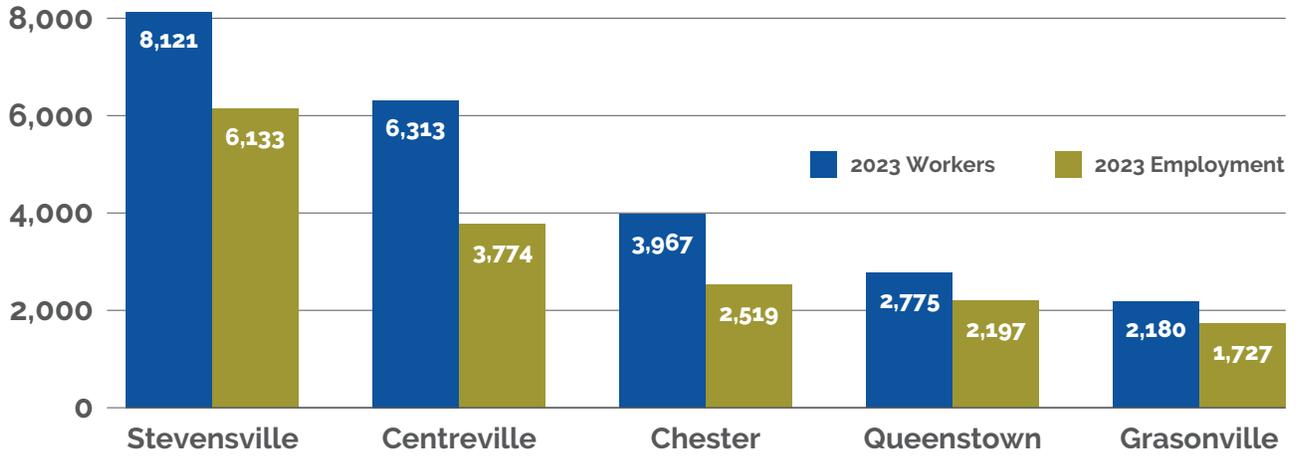


Source: Lightcast

# Place of Work vs. Place of Residence

Across most cities and unincorporated areas in the county, the available workforce outnumbers the available jobs in that city or area, indicating a significant portion of the workforce commutes outside of their city/area of residence for their job. While Centreville and Stevensville have the largest total number of residents commuting out, 2,539 and 1,988 respectively, Crumpton (88.5%) and Church Hill (61.8%) have the highest proportion of residents commuting out of the town.

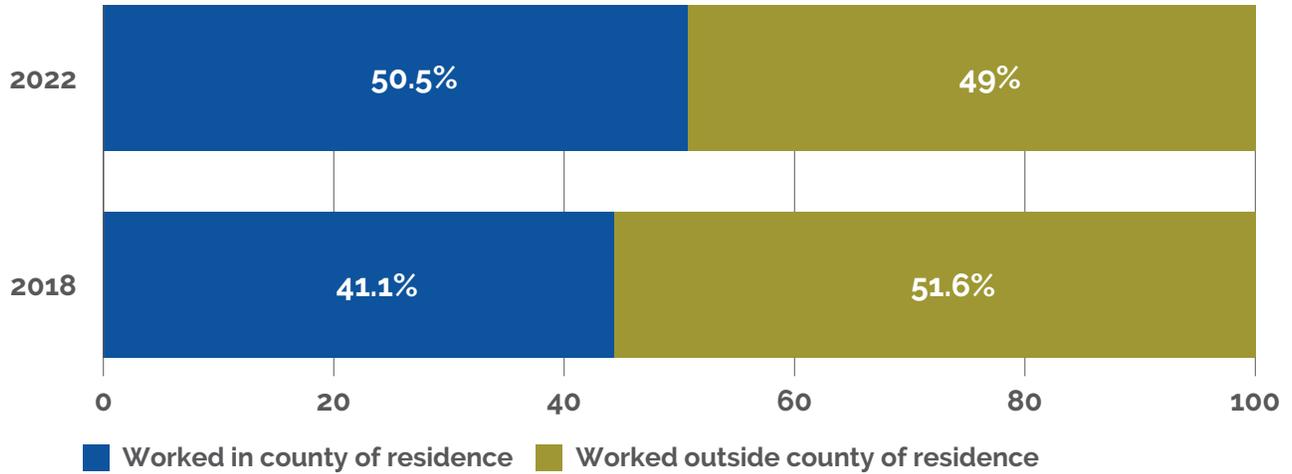
## Total Workers and Employment



Source: Lightcast

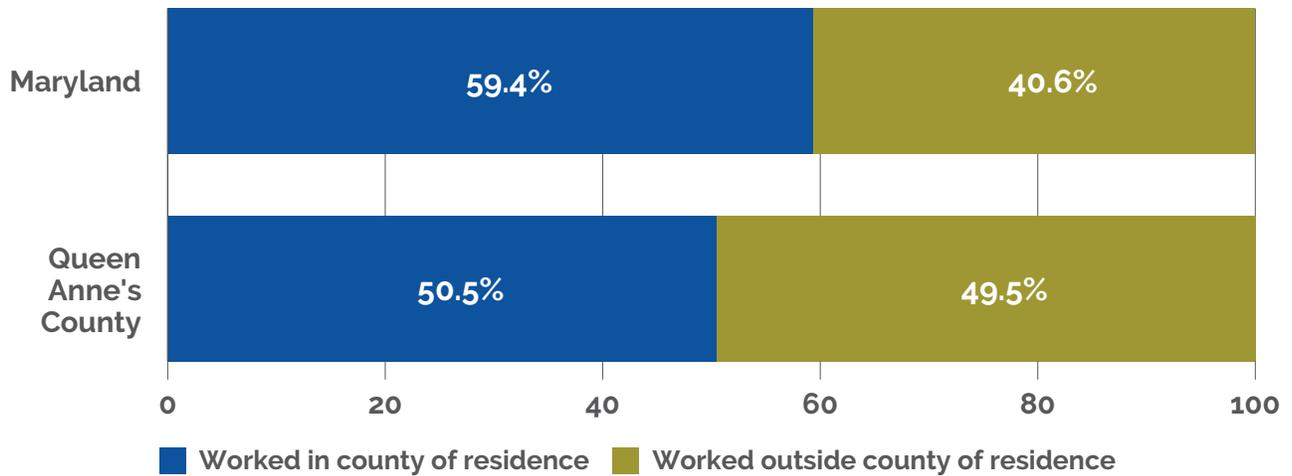
While many residents commute outside of their county of residence for work, that percentage has declined since 2018. When considering only those residents who work in the state of Maryland, Queen Anne's County has a much lower proportion of residents who work in the county in which they live when compared to all Maryland residents. Overtime, the portion of employees working in the county they live in has steadily increased. From 2013 to 2022, nearly 10% more of Queen Anne's County employees were working in the county.

## Working Locations, Queen Anne's County



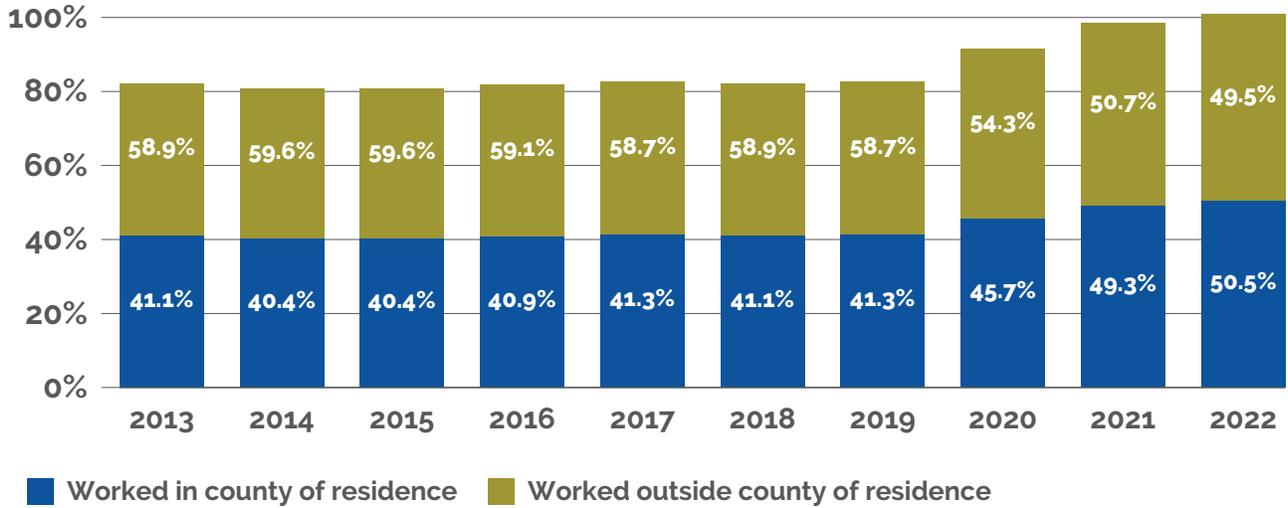
Source: US Census Bureau

## Working Locations within the State, Queen Anne's County vs. Maryland 2022



Source: US Census Bureau

## Working Locations, Queen Anne's County



Source: US Census Bureau

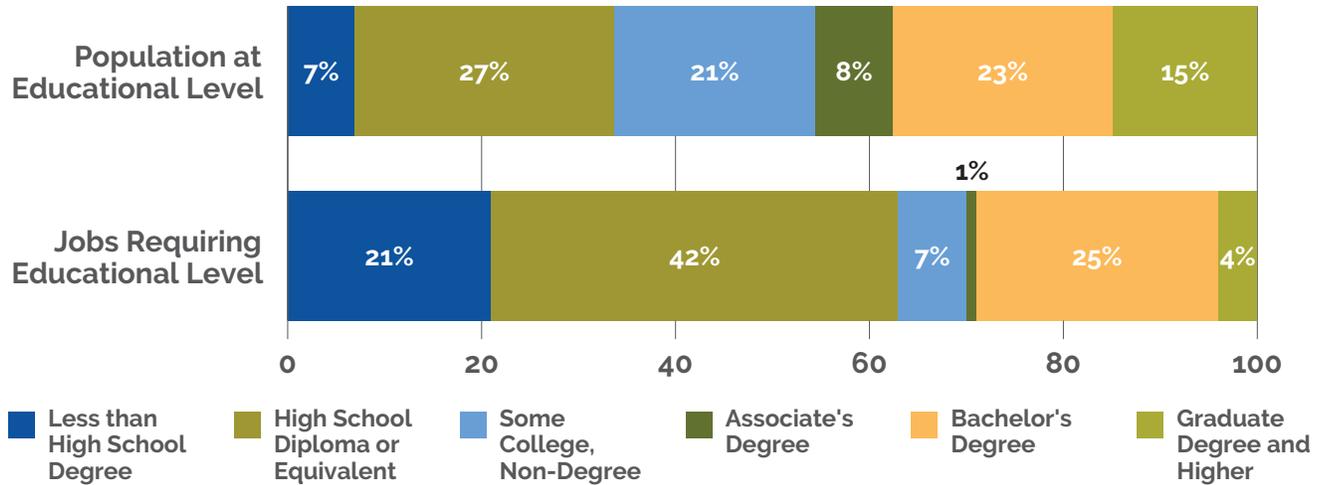
## Earnings

The median 2022 household income in Queen Anne's county was \$108,332 and the average household income was \$134,896. Significant variations in average income are present across different industries. The highest wages were seen in the utilities industry where the average 2023 wage was \$150,069. However, there were only 21 utility jobs in the county in 2023 and no new jobs were added in this industry between 2018 and 2023. The second highest paying industry, Wholesale Trade, did see moderate growth over that same time period with 91 jobs added bringing the 2023 total up to 1,060 jobs, with average earnings of \$118,020. This industry is also the largest contributor to the county's GRP – with \$345,057,412 in total economic activity wholesale trade accounts for 13.7% of the total GRP. Conversely, the lowest paying industries, on average, include Retail Trade, Arts, Entertainment, and Recreation and Accommodation and Food Services. Retail Trade and Accommodation and Food Services are some of the largest industries in terms of total jobs.

## Education

The majority (66.1%) of the Queen Anne's County population over the age of 25 has completed at least some college. Beyond this, 45.7% of the population has a college degree, and 37.7% have a Bachelor's degree or higher – this includes 23.0% who have obtained a Bachelor's degree, and 14.7% who have obtained a graduate degree or higher. Generally, the county population is overeducated compared to the job market in the county. In the county, 70.0% of jobs have no requirements for a college degree and 30.0% require either an associate's, Bachelor's, or Master's degree. These proportions are not in line with the educational attainment of county residents where 45.7% have a college degree and only 54.3% have no college degree.

## Working Locations within the State, Queen Anne's County vs. Maryland 2022

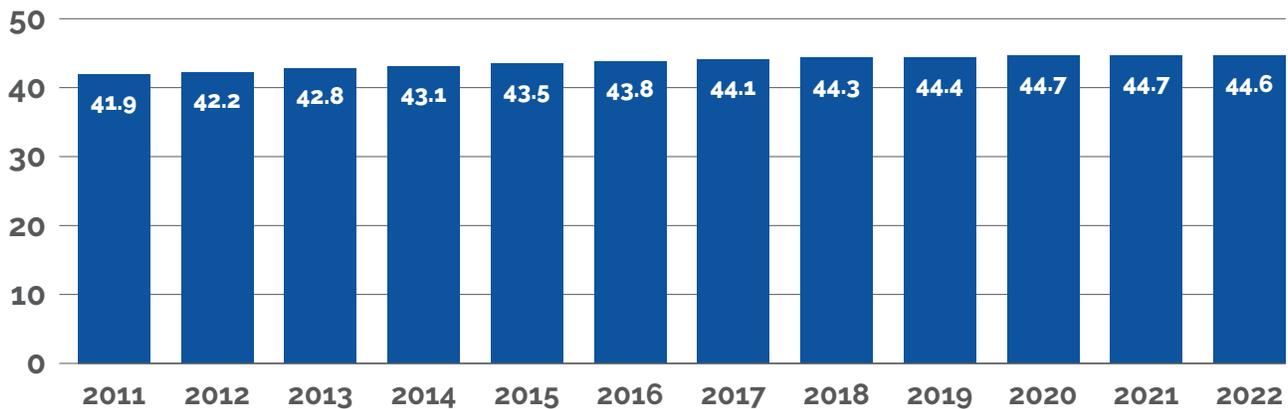


Source: US Census Bureau

## Aging Population

Queen Anne's County is faced with an aging population and a significant portion of residents who are nearing retirement age. Overtime, the median age in Queen Anne's County has been generally increasing, in 2022 it was 44.6. This is notably higher than the 2022 median age in Maryland which was 39.7.

### Median Age in Queen Anne's County (2011-2022)

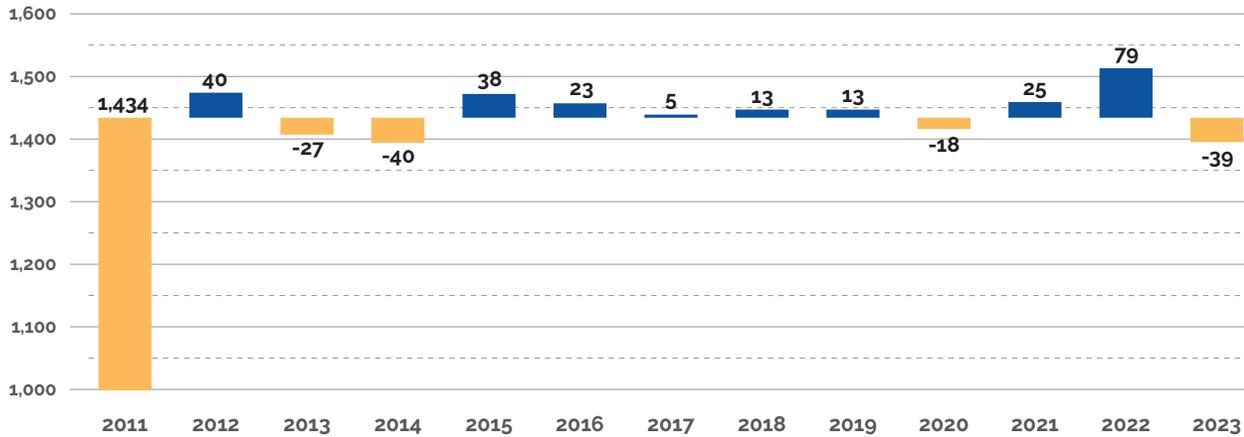


Source: US Census Bureau

# Employment Growth By Business Sector And Industry

As of 2023, Queen Anne's County was home to 1,546 employer establishments. Since 2011, the total number of employer establishments has fluctuated around an average of 1,480. An employer establishment is a physical location where a business conducts its activity.

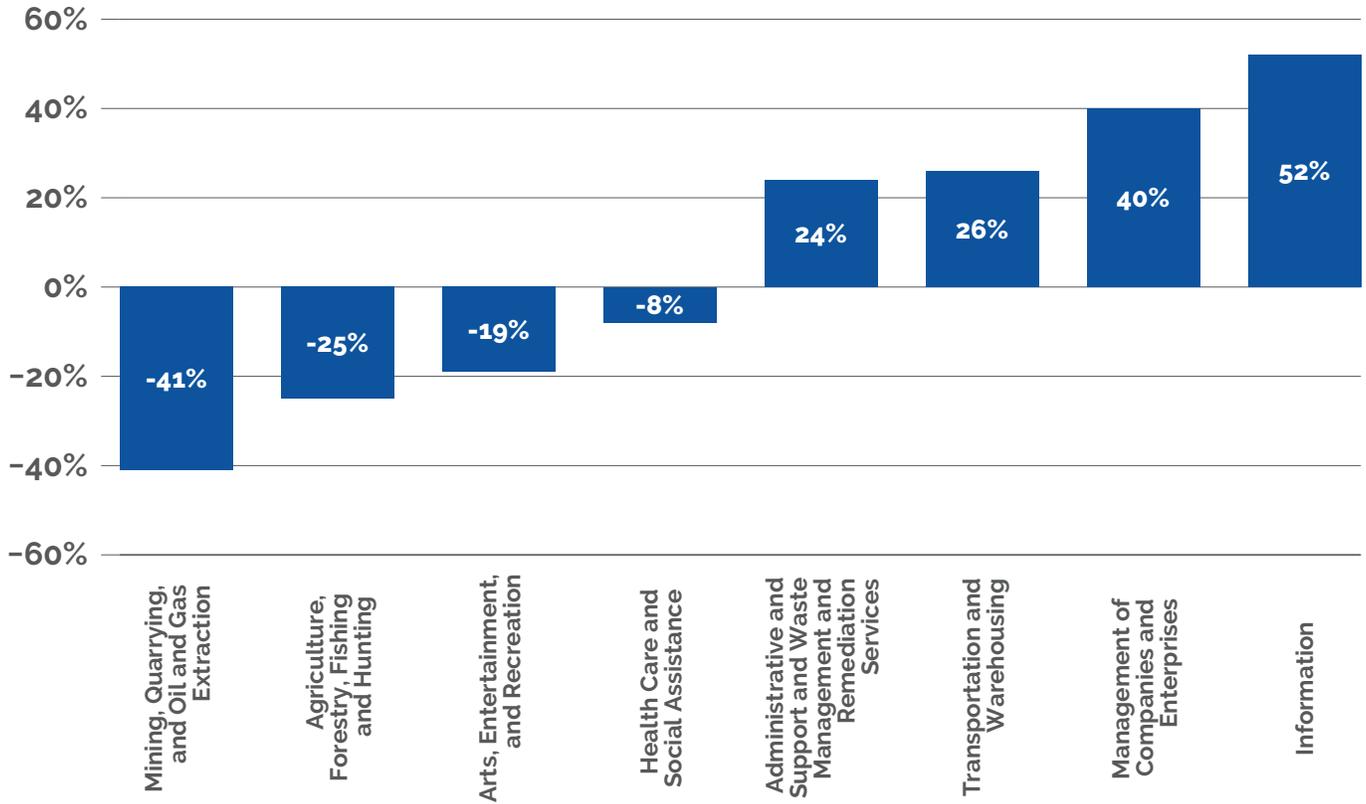
**Total Employer Establishments, Queen Anne's County (2011-2023)**



Source: Lightcast

The sectors with the highest historical 5-year growth rates in total jobs (2018 – 2023) include Information, Management of Companies and Enterprises, and Transportation and Warehousing. Information, despite being a small industry with only 44 jobs in the county in 2023, saw more than 50% growth in total jobs from the 2018 job total of 29. Based on data from the Bureau of Labor Statistics, the information sector in Queen Anne's County has an employment location quotient of 0.11, relative to the United States. This indicates a very low concentration of employment in this sector compared to countrywide averages. Company and Enterprise management was similar in size and growth with a 40% increase in total jobs, from approximately 10 jobs in 2018 to 14 in 2023. Another high growth sector, Transportation and Warehousing, saw a 26.1% Growth from 2018 to 2023, and an average annual growth rate in that time period of 5.0%.

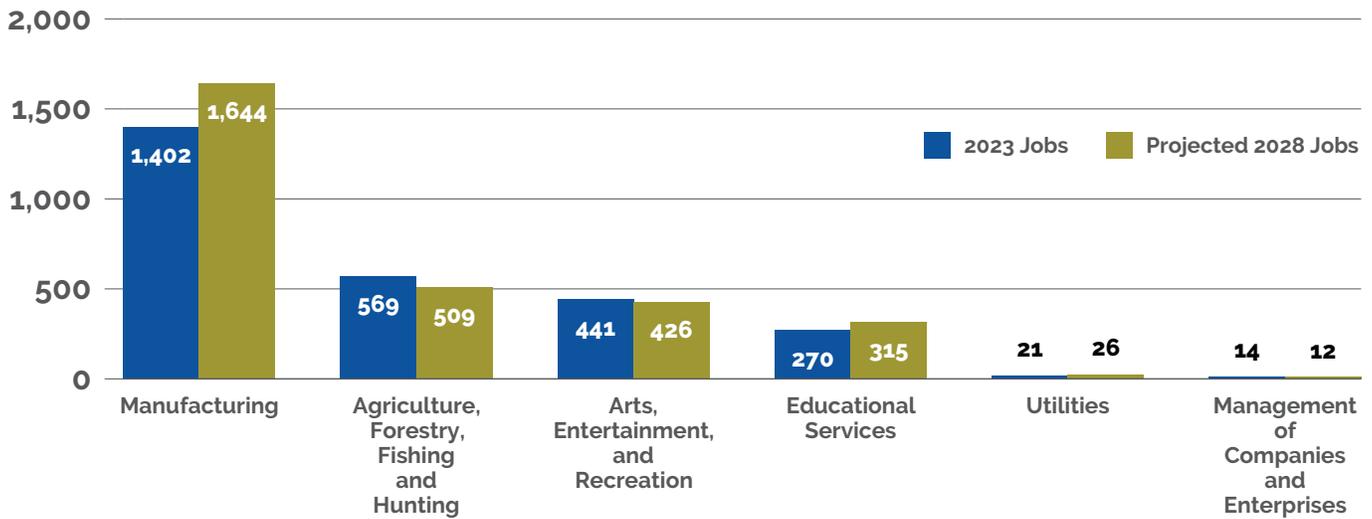
## Labor Force Participation Rates (2018-2023)



Source: Lightcast

Over the next five years, employment in Utilities (+23.8%), Manufacturing (+17.3%), and Educational Services (+16.7%) is expected to grow at the highest percentage. Conversely, percentage declines in employment are expected in Arts, Entertainment, and Recreation (-3.4%), Agriculture, Forestry, Fishing and Hunting (-10.5%), and Management of Companies and Enterprises (-14.3%). In terms of highest growth in additional jobs, Government (+285), Manufacturing (+242), and Administrative and Support, Waste Management and Remediation Services (+177), and Wholesale Trade (+172) have the highest number of additional projected employees.

## Total Workers and Employment



Source: Lightcast

Narrowing to specific industries, the highest projected growth rates for the next five years are in General Medical and Surgical Hospitals (+71.0%), Other Legal Services (+67.3%), Other Communications Equipment Manufacturing (+66.9%), Computer Facilities (+64.1%), Management Services (+63.0%), and Surgical Appliance and Supplies Manufacturing (+61.8%). The industries projected to add the highest number of employees include Colleges, Universities, and Professional School (+115), Landscaping Services (+67), and Wholesale Trade Agents and Brokers (+56).

## Commercial Business Analysis

### COMMERCIAL REAL ESTATE

There are over 20 zoning districts in Queen Anne's County, six of which are commercial zones. These include the Town Center, Urban Commercial, Airport Protection & Kent Island Gateway, Suburban Commercial, Kent Island Suburban Commercial, and Grasonville Neighborhood Commercial zoning districts. The county's zoning and subdivision regulations were updated in 2004 and have undergone many amendments in the past 20 years. In line with the 2022 Comprehensive Plan, it is expected that many additional changes will be made to the current zoning and subdivision regulations.

The department of Economic and Tourism Development also stewards multiple grants and incentives specific to commercial development. These include the Enterprise Zone Commercial Real Property Tax Credit – a credit for companies locating or expanding in within the Enterprise Zone, and the Commercial Property Tax Credit – offered to eligible businesses located outside of the Enterprise Zone.

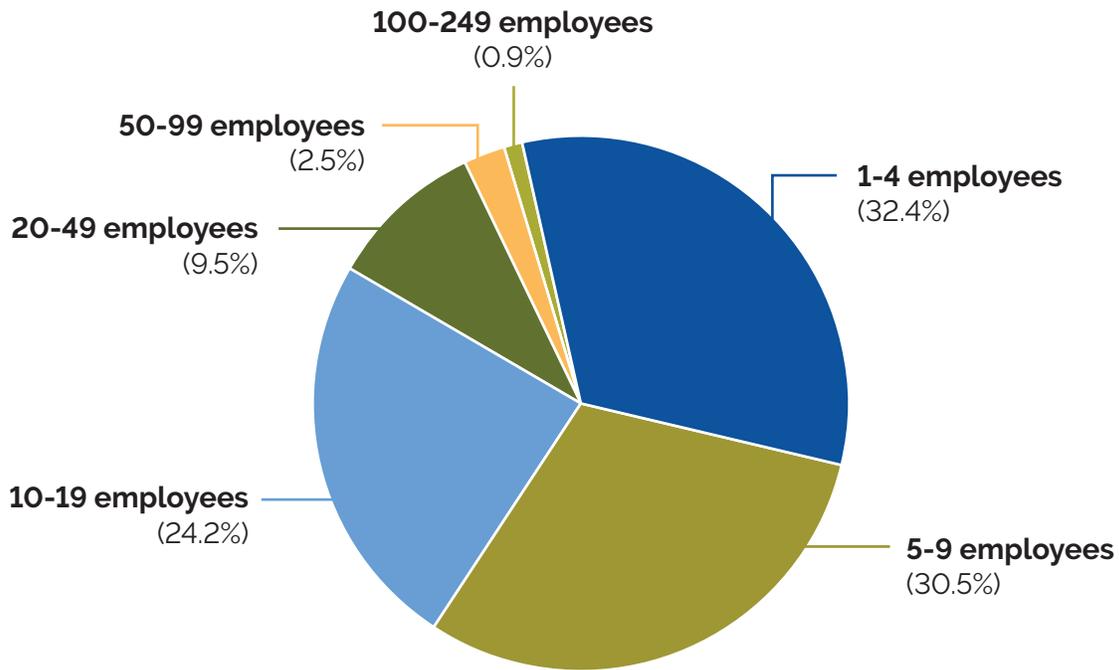
As of June 2024, 30 commercial properties are publicly available for lease in Queen Anne's County, along with 19 properties publicly available for sale. Many of these properties are concentrated in Kent Island, which is home to 16 properties available for lease, and 5 available for sale – nearly 50% of the active listings (42.3%).<sup>2</sup>

<sup>2</sup> <https://www.loopnet.com/search/commercial-real-estate/queen-annes-county-md/for-lease/?sk=g7e6500cbb52eb3e4f4b57aa4c977d79>

## SMALL BUSINESS AND ENTREPRENEURSHIP ANALYSIS

In 2024, Queen Anne's county was home to 2,114 small businesses. Small businesses range from sole proprietorships (1 employee) to business with 500 employees. Of these 2,114, a significant portion (87.1%) employed 19 or fewer employees. This proportion is very similar to that of the state of Maryland, where 86.5% of small businesses had 19 or fewer employees. The variation between employer establishments and small business counts is due to the high number of non-employer businesses.

### Small Business Sizes, Queen Anne's County



Source: Lightcast

The county stewards many business incentive programs, the following services are dedicated to supporting small businesses or entrepreneurs. This includes the Small Business Development Center (SBDC), a national free service for businesses and entrepreneurs that provides business consulting and training services, The Shore Mentor Program, and the Maryland Capital Enterprises (MCE) which offers small business resources and consulting. Additional support is available at the county level for entrepreneurs including a new program delivered by the ETD, the Minority Entrepreneurship Training Accelerator (META). This program will provide tailored support to five-minority owned businesses in the county that are looking to scale up from sole-proprietorship to larger businesses. While not a county specific resource, residents can leverage the Maryland Entrepreneur Hub and access robust supports like business resources, peer and mentorship groups, and connections to support organizations. Some of the resources offered include business counseling, navigation to loans, grants, and tax credits, event calendars, and promotions of available work spaces.

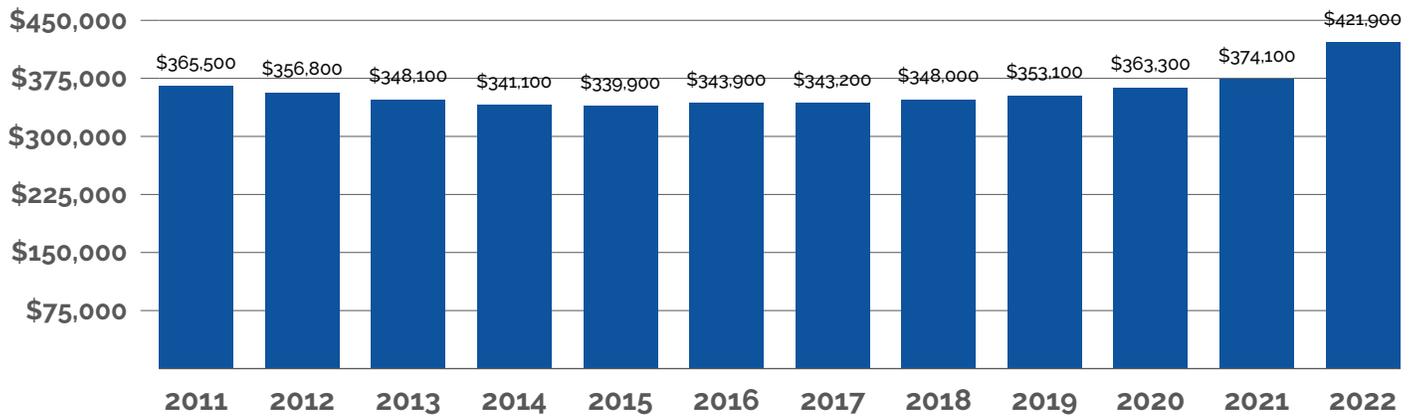
While there are a limited number of formal small business specific support opportunities offered by the county, the Department of Economic and Tourism Development is dedicated to scaling up the support offered. The department provides significant informal support to small businesses or entrepreneurs, helping them navigate the start-up process, and directing them to the appropriate resources or offices. They are continually providing education and information to the business community on relevant services and resources available at the county level, and beyond.

# Affordability and Income Inequality Analysis

## HOUSING

A key component of affordability is housing costs. Since 2019, median home prices in Queen Anne's County have been increasing each year. In 2022, the median home price was \$421,900, significantly higher than the median Maryland home price in 2022 of \$380,500.

Median Home Price in Queen Anne's County (2011-2022)



Source: US Census Bureau

A commonly used affordability measure is the Housing Affordability Index (HAI). This measure is calculated using the median home price, median family income, and the current interest rate. It also factors in the assumptions that homebuyers put down a 10% down payment and are subject to a 0.558% private mortgage insurance cost. HAI is calculated as follows:

$$\text{MONTHLY PAYMENT} = \text{P\&I} + ((\text{median home price} \times .9) \times .00558) + ((\text{county tax rate} \times \text{median home price}) / 12)$$

$$\text{P\&I} = \text{Median Home Price} \times .9 \times (\text{IR} / 12) / (1 - (1 / (1 + \text{IR} / 12))^{360})$$

$$\text{QUALIFYING INCOME} = \text{Monthly Payment} \times 3.33 \times 12$$

$$\text{HAI} = (\text{Median Family Income} / \text{Qualifying Income}) \times 100$$

Using the standard HAI inputs, a 6.6% (December 2023 average) interest rate<sup>3</sup>, the median home price of \$421,900, median family income of \$108,332, and county taxes of \$0.830 per \$100 assessed valuation, the HAI for Queen Anne's County is 103.31. The median home price in Queen Anne's County is significantly higher than the median price in Maryland of \$398,100, and the nationwide median price of \$320,900. This index means that the median family earns 103.1% of the income necessary to purchase a median-priced home, under traditional loan requirements.<sup>4</sup> This Index does not fully take into account the stock of available housing, nor does it communicate the ease with which a resident outside of the county could purchase a home in Queen Anne's County. It also assumed buyers are able to put down a 10% down payment, which is equivalent to \$42,190 for the median home in the county. Queen Anne's County has seen a very moderate increase in total housing units year-over-year with an average annual growth rate of 0.6% from 2018 to 2023, bringing the total housing units in 2023 up to 21,405 units.

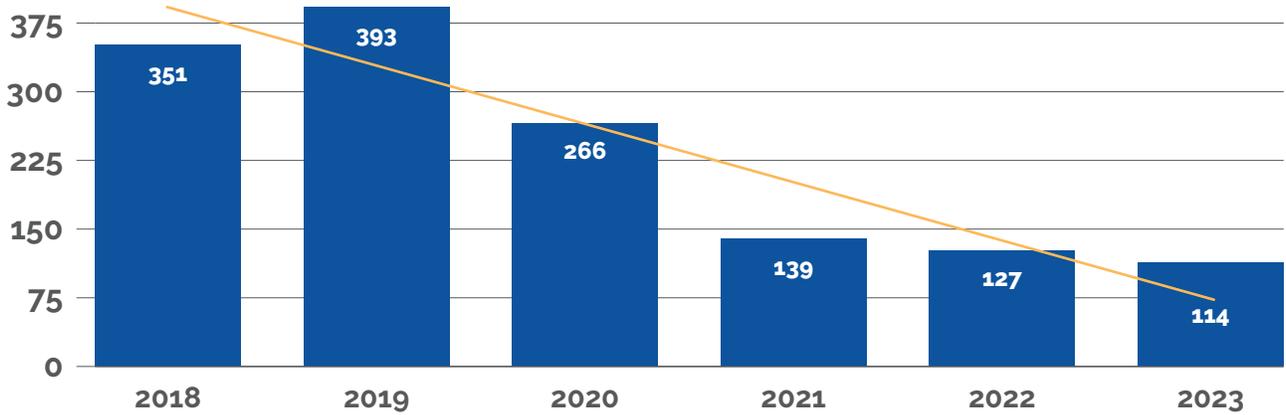
<sup>3</sup> Freddie Mac, 30-Year Fixed Rate Mortgage Average in the United States [MORTGAGE30US], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/MORTGAGE30US>, June 27, 2024.

<sup>4</sup> <https://www.atlantafed.org/center-for-housing-and-policy/data-and-tools/home-ownership-affordability-monitor>

Over a similar period, the portion of renter-occupied housing units increased at a much steeper rate. The average growth rate in renter occupancy was 4.1% from 2018 to 2022 and is approaching 20% (18.5%).

A general downward trend has been observed in the number of active home listings in the county. With a 6-year peak in 2019 of 393, the housing stock was at less than 50% of that value in 2023 – 11424 homes.<sup>5</sup>

### Average Annual Active Home Listings in Queen Anne's County (2018-2023)



Source: US Census Bureau

### EARNINGS

In early 2024, The Office of the Under Secretary for Economic Affairs released cost of living index estimates for all counties. Queen Anne's County has an estimated cost of living index of 104.6, meaning it is slightly above the national average cost index of 100. Cost of living varies significantly across the state of Maryland, the lowest index of 85.8 compared to the highest of 114.34. It is important to note that this estimated index is a county-wide value and the cost of living also varies across the county. The surrounding counties on the Eastern Shore of Kent, Caroline, and Talbot all have lower average costs with indexes of 98.0, 90.4, and 101.3, respectively.<sup>6</sup>

Average and median household incomes vary significantly across the surrounding counties, with Queen Anne's County consistently ranking at the higher end for both measures. To understand income differences across the state and nearby regions, data was gathered for counties and states frequently mentioned during stakeholder engagement discussions. Locations included in this comparison are Anne Arundel County, the District of Columbia, Prince George's County, Baltimore County, Kent County, Caroline County, Talbot County, Maryland, Delaware, and Virginia. Queen Annes's County had both the second highest average income and the second highest median income. Average and median incomes in Queen Anne's County are also higher than the Maryland, Delaware, and Virginia averages and medians. Anne Arundel county has the highest average income of \$116,009 and the District of Columbia had the highest median income of \$150,292. Kent County and Caroline County are the surrounding counties with the lowest earnings across both the average and median incomes.

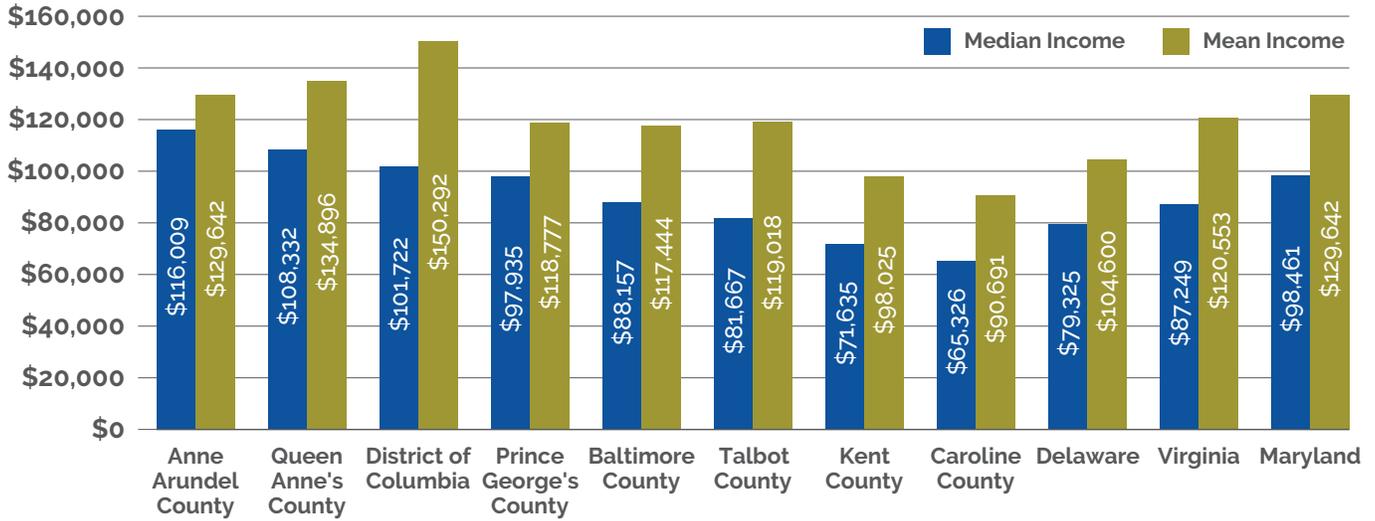
Anecdotal evidence from discussions with community members highlighted a perception of a more significant difference in wages between the Eastern and Western shores. Many community members who participated in interviews or focus groups stated a belief that Queen Anne's County faced challenges in competing with higher wages on the Western shore. While wages may be closer than many county residents know, there are many significant differences in the overall labor markets between Queen Anne's County and other nearby counties including the District of Columbia and Prince George's County. Queen Anne's has a smaller labor market, lower

<sup>5</sup> Realtor.com, Housing Inventory: Active Listing Count in Queen Anne's County, MD [ACTLISCOU24035], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/ACTLISCOU24035>, June 27, 2024.

<sup>6</sup> <https://www.commerce.gov/news/blog/2024/03/estimating-county-level-regional-price-parities-public-data>

unemployment, and lower cost of living than both of these counties, all of which contribute to the perception of labor markets and income disparities.

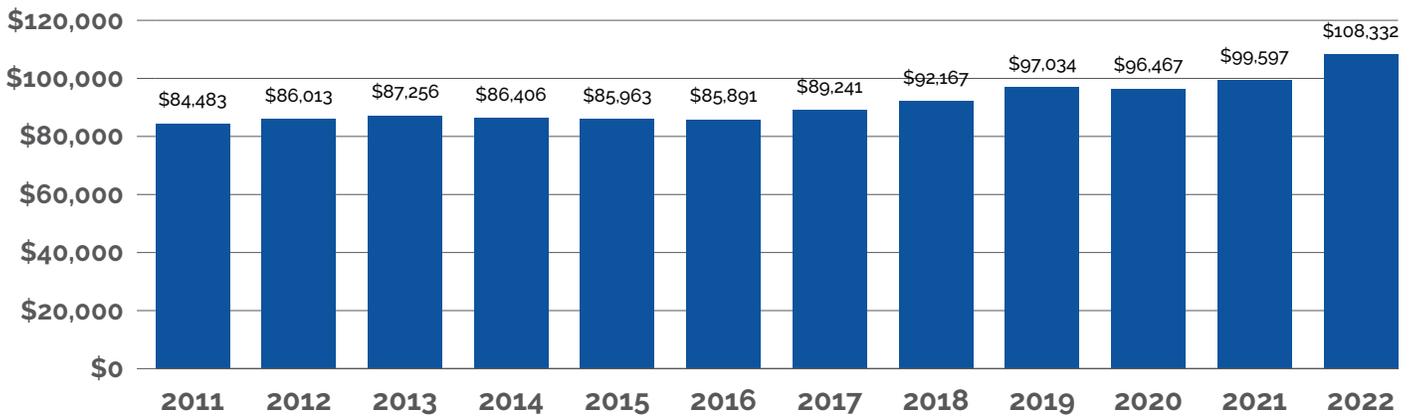
### 2022 Median and Mean Incomes



Source: US Census Bureau

Over time, there has been a general upward trend in median household earnings. While there was a noticeable dip in 2020, this is likely a result of the economic impacts of COVID-19 and was also a trend seen across the county. Earnings have since recovered to, and outgrown pre-COVID earnings.

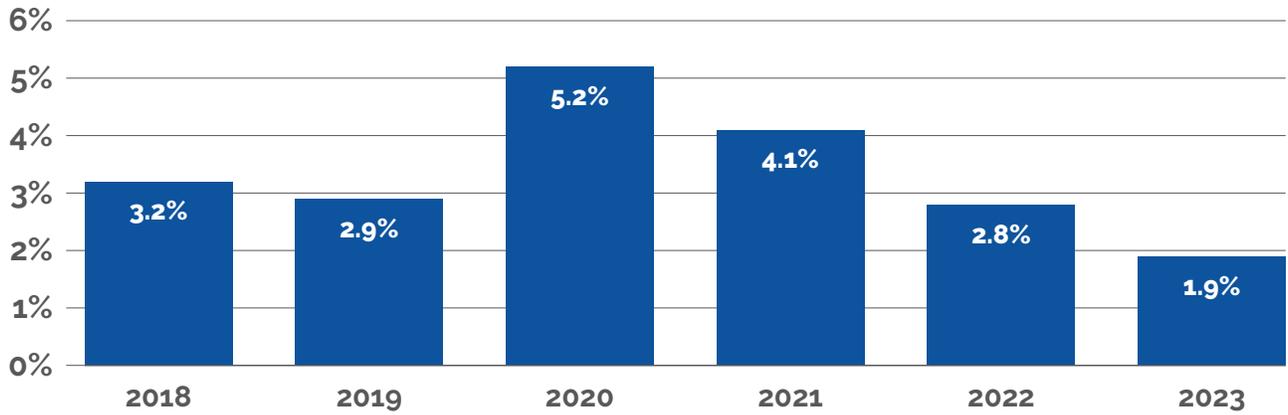
### Median Home Price in Queen Anne's County (2011-2022)



Source: US Census Bureau

Queen Anne's County unemployment in 2023 of 1.9% was very low, compared to both state- and country-wide rates. Unemployment was on a decline up until 2020, when it spiked due to COVID-19, but it has since fallen and is now lower than pre-COVID rates. The combination of low unemployment rates, steady labor force participation rates, and an aging population, had led to a very tight labor market. These factors have made hiring in the county a challenge and likely contribute to the high number of residents who commute outside of the county for work.

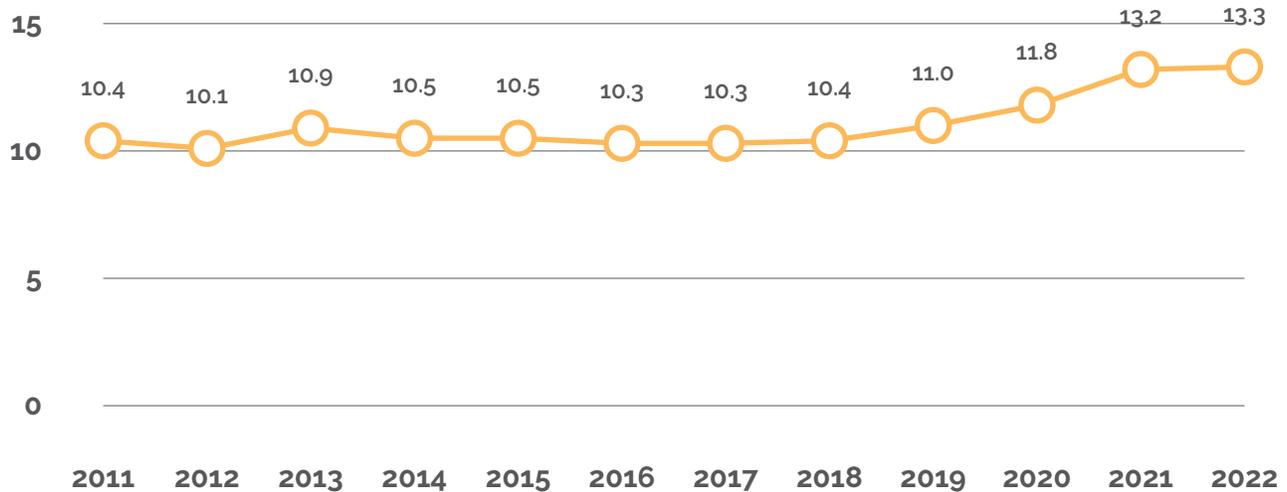
## Unemployment Rate in Queen Anne's County (2018-2023)



Source: FRED

The most common income inequality measure is the Gini index. This index compares the mean income for the highest quintile (top 20 percent) of earners to the lowest quintile (bottom 20 percent) and is evaluated on a scale of 0 to 100, with higher values indicating higher levels of income inequality. With a Gini coefficient of 13.3, there is a relatively equitable distribution of income in Queen Anne's County. However, this coefficient is increasing and has risen year-over-year for the past five years.

## Income Inequality in Queen Anne's County (2011-2022)



Source: FRED



**Queen  
Anne's  
County**

MARYLAND

WHERE SHORE  
LIVING BEGINS