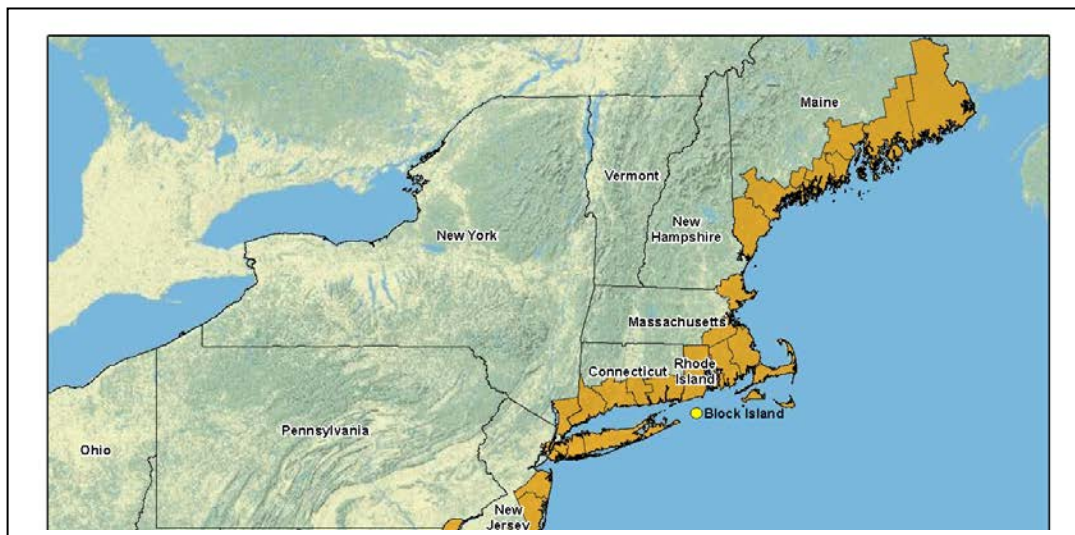




Atlantic Region Wind Energy Development: Recreation and Tourism Economic Baseline Development

Impacts of Offshore Wind on Tourism and Recreation Economies



U.S. Department of the Interior
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1. INTRODUCTION

The U.S. possess a large and accessible offshore wind energy resource, and the National Renewable Energy Laboratory estimates that U.S. offshore winds have a gross potential generating capacity four times greater than the nation's present electric capacity. Since Denmark's first offshore project in 1991, Europe has held the lead in offshore wind development. Today, just more than 600 MW of offshore wind energy is installed worldwide, all in shallow waters (<30 meters) off the coasts of Europe (BOEM, 2012). While the United States has no offshore wind generating capacity to date, the first U.S. offshore commercial wind lease was signed in 2010 by Secretary of the Interior Ken Salazar and Cape Wind Associates for a project in federal waters off Massachusetts.

There are potential environmental and socioeconomic impacts and benefits associated with the development of offshore wind facilities. This report presents the analytical methods and findings of BOEM's study on coastal tourism and recreation economies and offshore wind development along the eastern United States. The study began with a literature synthesis of existing analyses on the impacts on tourism and recreation economies associated with offshore wind development. This information was the basis for the development of metrics used to estimate the sensitivity of a given geographic area to offshore wind development. We created a scorecard of these metrics and used it to select 70 communities for further research. We collected physical, demographic, socioeconomic, and tourism industry data for these communities and then created narrative profiles and a geodatabase of the information. This data will be useful for policy-makers, community groups, and industry seeking to understand the relationship between coastal tourism and offshore wind development, as well as the potential geography-specific implications for offshore wind development along the eastern U.S. seaboard.

This report is organized into the following sections:

- *Literature Synthesis:* Section 2 describes ICF's literature review of international and national studies on the impacts associated with offshore wind development on tourism and recreation economies.
- *Data and Approach:* Section 3 describes the methodology for researching, calculating, and presenting the data. We explain how the relevant data fed into the analysis and how the metrics were used to identify sensitivities.
- *Findings:* Section 4 provides our findings from the community profiles.
- *Conclusion:* Section 5 summarizes the main findings.
- *Appendices:* Section 6 includes a list of the geographic areas studied, snapshots of the databases created by ICF, and other spreadsheets and diagrams referenced throughout this report.

2. LITERATURE SYNTHESIS

Coastal tourism and recreational economies are based on the natural setting and resources, public perception of the area and resources and, ultimately, the value people place on the use of these resources. Limiting access to or degrading the natural resources that draw tourists and recreational users will result in negative economic impacts on the tourism and recreation sectors. Possibly more importantly in the case of offshore wind development, a change in the public's perception of a location can also lead to economic impacts. These could be detrimental impacts, if negative perception leads tourists to avoid a destination with offshore wind facilities. Conversely, if the public has a positive perception of offshore wind, these facilities may provide a new source of coastal tourism and draw new visitors to coastal areas.

The purpose of the literature synthesis report (Appendix A) was to identify existing data and studies on the effects of offshore wind projects on tourism and recreational economies. The literature synthesis shows that very little information exists on these effects because few studies have measured the impacts on recreation and tourism resources from constructing or operating offshore wind facilities. The synthesis report does include studies that analyze the public's perception of offshore wind facilities and how those perceptions translate into effects on tourism and recreational uses. Finally, the literature synthesis presents studies on actual impacts from operating wind energy facilities, as well as studies on the anticipated impacts from future offshore wind development.

The literature discussed in this synthesis report focuses on the changes in recreational and tourism use patterns that occur with development of offshore wind projects. We have summarized our findings in the section below. For the full analysis, please refer to the Atlantic Region Wind Energy Development: Recreation and Tourism Economic Baseline Development Literature Synthesis Report in Appendix A.

2.1 ACTUAL IMPACTS FROM OPERATING WIND FACILITIES

Offshore wind facilities have been operating in Europe for 20 years, making European studies useful in evaluating potential future impacts in the U.S. Because recreational and tourism impacts are largely dependent on the public's perception of the wind facilities, Europe also provides the opportunity to look at how public perception has evolved from the early phases of introducing project plans, through construction, and throughout the years of operation. The following studies provide insight on the perception and impact on tourism and recreation from offshore wind facilities in Europe.

- A 2003 Danish poll with 700 responses on attitudes toward operating wind facilities showed that an overwhelming majority of respondents (80 percent) had positive attitudes toward the offshore wind facilities (Ladenburg et al., 2005).
- A 2005 study by Kuehn quantitatively reviewed public dialogue in local press and interviewed a small group (26 interviewees). The study suggested no decline in the tourism industry and reported that the price of vacation rental properties was not affected

(Kuehn, 2005). However, due to the small sample size (26 interviewees), it is difficult to extrapolate these findings to overall perceptions of offshore wind (Keuhn 2005).

- A 2008 Scottish survey by Riddington of 400 tourists found that 75 percent of respondents had a positive or neutral opinion of a wind facility's impact on a landscape, and that beach walkers had a more positive opinion than sunbathers (Riddington, 2008). The report also discusses the Scroby Sands offshore wind facility tourist information center which runs tours out to the wind facility. Following construction of the offshore wind project, Scroby Sands Information Centre had 30,000 visitors in the first six months, and 35,000 visitors the following year.
- A 2009 study by Ladenburg analyzed 1,082 responses to determine if differences in attitude towards offshore wind development were linked to the way a respondent used the beach. Respondents who frequently walk on beaches near offshore wind facilities tended to have a stronger opinion (negative or positive) than those who visited the beach less frequently; less frequent beach users tended to be more neutral (Ladenburg, 2009).
- A 2009 study by Ladenburg and Dubgaard analyzed 700 responses and found that demographic factors, including income, age, and education, along with the respondents' frequency of use, affect attitudes towards wind facilities. Ladenburg and Dubgaard concluded that offshore wind facilities may have a slightly negative impact on current recreational beach users but a more positive impact on new users (Ladenburg and Dubgaard, 2009).

2.2 ANTICIPATED IMPACTS FROM FUTURE OFFSHORE WIND DEVELOPMENT

Although there are numerous operating offshore wind facilities in Europe, the U.S. has no operational wind facilities to date. Thus, socioeconomic impact studies related to offshore wind in the U.S. have been limited to forecasting potential impacts and evaluating anticipated public opinion of wind facilities. Based on the literature review of European observations, ICF determined that anticipated impacts do not necessarily correspond with actual impacts. As deployment of U.S. offshore wind technology expands, the understanding of socioeconomic impacts will improve.

2.3 TYPOLOGY OF IMPACTS FROM OFFSHORE WIND DEVELOPMENT

The socioeconomic impacts evaluated in the current literature can be categorized into two groups: aesthetics, and recreational and tourism use and activities. The studies presented in the following two sections address both actual and anticipated impacts.

Aesthetics

Beaches regarded as undeveloped are important tourist destinations and are often valued for their remoteness (Peregrine Energy Group, 2008). These beaches may be particularly sensitive to offshore wind facilities as the presence of turbines on the marine horizon could result in changes to the viewshed. As described in the Cape Wind Final Environmental Impact Statement (MMS, 2009), construction activities in particular, including increased vessel traffic and noise, have the potential to change the aesthetics of coastal and offshore areas, and to affect recreational

activities and tourism. An operating wind facility on a marine horizon could change the nighttime and daylight viewsheds (depending on its distance from shore and the weather conditions); during the day, turbines are typically visible, while at night, light markers on turbines change the evening view (Kuehn, 2005). Overall effects depend on the number of turbines, the height and size of the turbines, their distance from shore, and the seasonal weather conditions.

Opponents of offshore wind development argue that turbines change or spoil the aesthetic character of a region and can disrupt a visitor's enjoyment of the site, which in turn impacts the tourism industry negatively. However, the following studies show that little to no impact has been found.

- A Scottish study on the effects of an onshore wind project on tourism found that, unless prompted, none of the respondents mentioned the wind facility when asked about negative/positive aspects of the area. Of the 1,810 participants, when asked directly about a wind facility, 12 percent said it spoiled the landscape, seven percent said it was an overall negative aspect, and 20 percent said it was an overall positive (MORI Scotland, 2003).
- Studies found that the Danish Horns Rev project was considered to have little to no impacts by the public following one year of operation (Ladenburg et al., 2005; Danish Energy Authority, 2006).
- A 2009 study presented 1,003 visitors at New Jersey's Atlantic City Boardwalk with visual simulations of a wind facility and asked them what disadvantages the images presented. Seventeen percent of respondents found offshore wind facility to be an eyesore, while 11 percent indicated it obstructed the ocean view. However, 16 percent of respondents said that there was no difference. Overall, 66 percent said that an offshore wind facility would have a positive effect on the city and the local environment (Schulman and Rivera, 2009).
- When asked about the potential effect of offshore wind facilities on a landscape, a 2010 study of 1,000 out-of-state tourists at Delaware beaches found that 20 percent of respondents were positive, 57 percent were neutral, and 23 percent were negative (Lilley et al., 2010).
- In a Delaware study, offshore wind polled more favorably than fossil fuel power plants, with 61 percent of tourists indicating that they would visit a beach with a fossil fuel plant nearby, while 74 percent would visit a beach near an offshore wind facility (Rock and Parsons, 2011).

Although most studies point to overall acceptance of offshore wind development, there remains a strong preference to site wind facilities as far offshore as possible to minimize the effects to the viewshed (Danish Energy Authority, 2006; Ladenburg et al., 2005; Firestone et al., 2008b) as studies show that the farther offshore a wind facility is sited, the higher the acceptance of the project (Lieberman, 2006).

- A 2010 study in Delaware found 25 percent of surveyed beachgoers would switch beaches if offshore wind turbines were sited 10 km offshore; 95 percent would return if wind facilities were sited 22 km offshore; and 99 percent would return if wind facilities were not visible from shore (Lilley et al., 2010).
- A survey of 370 tourists on French beaches in Languedoc Rousillon indicated that the impact of wind facility disamenity costs on tourist revenue would be zero if the wind facility were to be located 8 to 12 km from shore (Westerberg, 2010). Consistent with other studies, there is a strong willingness to pay to site wind facilities further offshore in order to minimize visual impacts.
- A 2011 study on offshore wind development found that the most significant visual impacts are likely to occur within 5 kilometers (km) of a wind facility, and that public perception improves as the facility is sited farther offshore (Ledec et al., 2011).

Recreation and Tourism Uses and Activities

Overall, studies indicate that offshore wind facilities would have minimal to no impact on beach use. Recreational and tourism uses and activities are identified in this section as general beach use and recreational uses (i.e., boating, fishing and diving, and wildlife viewing). Several studies have indicated that acceptance of the aesthetic change resulting from an offshore wind project is related to how an individual uses the beach and coastal resources. The following surveys have been conducted to gauge the expected effects of offshore wind development on beachgoers:

- A 2010 study of 1,000 out-of-state tourists on Delaware beaches found that, when questioned on how the development of an offshore wind facility would affect their future visits, respondents sampled on the boardwalk were 10 times more likely to continue visiting a beach with offshore wind turbines compared to those sampled on the beach (Lilley et al., 2010). The same study also found that respondents who would continue visiting a beach with an offshore wind facility put more value on vehicle access to the beach than those who would not continue to visit. These results may suggest that beaches with improvements such as boardwalks or ease of vehicle access may be less significantly impacted by changes in use patterns due to offshore wind facilities than unimproved, more pristine beaches.

Lilley et al. (2010) also reported that survey respondents with higher incomes said they would be less likely to visit a beach with an offshore wind facility. Families with older teenagers are 3.5 times more likely to visit the same beach with offshore wind, and younger respondents (under 30) were 9.2 times more likely to visit a Delaware beach with offshore wind (Lilley et al., 2010).

- In North Carolina, 89 percent of survey respondents would maintain planned beach trips if there were 100 wind turbines one mile offshore; five percent would not visit the beach; and six percent would take a trip to a different beach. On average, respondents would decrease the number of trips by one per year (14 trips instead of 15). Overall, 50 percent

of respondents believe that offshore wind facilities could have a positive impact on view (Landry et al., 2010).

Offshore wind development may also negatively impact existing coastal resources used for recreation.

- One German study found that the installation of offshore wind facilities may decrease wave power, with the potential to impact surfing conditions (Michel et al., 2007). This could potentially diminish the beach as a surfing destination and, consequently, impact the local surf-related economies.
- Minimal impact would be expected on smaller water craft that will be able to navigate through the wind facility. However, because sailboats do not have the same navigational flexibility as power-driven crafts, a wind facility could become an obstacle interfering with navigation under sail (RYA, 2004).
- The design and layout of the wind facility will determine the level of effects on recreational navigation and fishing within the wind facility. A 2006 survey of recreational and commercial fishers in the U.K. showed that, although commercial fishers were very concerned about safety and inability to maneuver within the wind facilities, recreational fishers saw the wind facilities as potentially generating better fishing conditions (Mackinson et al., 2006).

Vacation rental properties are another aspect of recreation and tourism and are directly impacted by property values. At the operating wind facility at Horns Rev, Denmark, tourist volume was reported as constant relative to pre-wind facility levels, and vacation property prices shifted with the national averages one year into operation of the wind facility (Kuehn, 2005). However, this was a qualitative study, and little other information is available regarding changes in property values associated with the presence of operating wind facilities in Europe.

U.S. studies have found that residents do not expect impacts to property values as a result of offshore wind development. A study of approximately 1,000 respondents assessed the potential impact of offshore wind on property rentals in New Jersey (Schulman and Rivera, 2009):

- 76 percent of the respondents indicated that a wind facility would not impact rental properties.
- 13 percent thought it would be harder to rent properties.
- 10 percent believed it would be easier to rent properties with an offshore wind facility in the vicinity.

Several studies have been conducted in the U.S., but they are based on perception rather than empirical evidence from an operating wind facility. A 2003 economic study (Haughton et al., 2003) of the Cape Wind project quantified expected loss of property values and tourist spending based on respondents' feedback. To project the loss of total property value due to the offshore wind facility, the authors asked homeowners to estimate the change in the value of their property. This estimate was then applied to all properties in the municipality to calculate an

anticipated total loss in property value. Given that this estimate is not based on any empirical data, quantitative assessments of loss of value due to the wind facility using these estimates did not yield reliable results. However, based on surveyed opinions, the authors anticipated a 4 percent reduction in value for inland homes and 11 percent for waterfront property (Haughton et al., 2003). Given the small sample sizes and the lack of empirical grounding, these estimates of valuation loss are not reliable.

Finally, some socioeconomic analyses have identified the potential for wind facility-based tourism (Kuehn, 2005; Mackinson et al., 2006). However, extensive research on this topic has yet to be conducted.

- The Scroby Sands offshore wind facility in the U.K. operates a tourist information center and runs tours out to the wind facility. Following construction of the offshore wind project, Scroby Sands Information Centre had 30,000 visitors in the first six months and 35,000 visitors the following year (Riddington et al., 2008).
- In a French study, Westerberg et al. (2010) suggest that recreational activities, such as boat tours through the wind facility and diving at turbine foundations that serve as artificial reefs, could compensate for potential visual effects.
- A German study of 3,500 beach visitors found that 35 percent of those questioned would be interested in seeing an information center on the offshore wind facility (NIT, 2000).
- In one Scottish study, 80 percent of the respondents would be interested in visiting a terrestrial wind facility visitor center for offshore facilities (MORI Scotland, 2002).
- A study of Delaware beachgoers found that 45 percent of respondents would likely take a tour boat to see an offshore wind facility (Lilly et al., 2010).
- A ferry company in Massachusetts, Hy-Line, is planning to run tourist trips to the Cape Wind project during construction and operation with the expectation that it will be a popular tourist destination (*Cape Cod Times*, 2011).

Several key findings were derived from the literature synthesis. First, impacts from offshore wind development can stem either from enhancement or degradation of natural resources or from public perception of offshore wind facilities. Impacts related to public perception, in particular, will evolve with increasing awareness of and exposure to offshore wind facilities. Second, the literature indicates that, although some impacts do occur, others are anticipated but are not realized. Further research will improve our understanding of the actual impacts from offshore wind development. Finally, socioeconomic impacts from offshore wind development can be categorized in two groups: aesthetics and recreational and tourism use and activities. Thus, sensitivity to impacts from offshore wind development depends on the presence of community assets in these categories. If sensitivity exists, the magnitude of the impacts depends on a variety of physical and socioeconomic factors.

3. DATA AND APPROACH

3.1 SCORECARD ANALYSIS

ICF conducted a scorecard analysis to identify the areas on the Atlantic seacoast that are most likely to experience impacts to tourism and recreational economies from offshore wind development. Scorecard analysis is a commonly used method to assist in the ranking or rating of a set of items according to multiple criteria or objectives. In this case, the scorecard analysis was designed to rank coastal areas by their exposure to impacts on tourism and recreational economies from offshore wind development. In our analysis, coastal areas were generally counties but, in some cases, included smaller geographies (more detail on this is provided below in section III, “Geographies for Analysis”).

Key Criteria

The first step of the scorecard analysis was to identify a set of criteria on which to rank and evaluate the coastal areas of interest. To develop the set of criteria for the scorecard analysis, we considered the potential for a coastal area to encounter socioeconomic impacts related to offshore wind development from each phase of wind facility development (i.e., planning, construction, and deconstruction). We considered both beneficial and detrimental impacts of offshore wind development. Because the offshore wind industry is still in an early stage of development in the U.S., we reviewed literature about existing international wind facility projects to develop a better understanding of actual impacts associated with wind facility construction and operation.

Informed by the literature review, we developed a set of criteria as the most informative indicators of a location’s sensitivity to offshore wind development. In addition to listing each criterion, we provide a brief justification for its inclusion. Specific metrics within each criterion were created to address the impacts associated with aesthetics and recreation (i.e., fishing, sailing, and other coastal activities). The term “geography” refers to each specific region; for counties, the data were extracted using county-level filters (i.e., FIPS codes). For hotspots, the data are presented for the municipal level (i.e., Zip Codes), where available.¹

- **Ocean recreation/tourism accounts for a large percentage of the location’s tourism economy.** Geographies with a large percentage of their tourism employment tied to ocean recreation and tourism² may be particularly sensitive to offshore wind development (Landry et al., 2010; Gabriel et al., 2009; Mackinson et al., 2006; Kuehn, 2005; MORI Scotland, 2003).
- **Ocean recreation/tourism accounts for a large percentage of the location’s marine economy.** Likewise, geographies with a large percentage of their *marine* economy³

¹ Data based on FIPS codes and Zip Codes were compiled from database sources such as the Bureau of Labor Statistics and the U.S. Census Bureau.

² Ocean recreation and tourism comprises tourism-related NAICS codes for sightseeing water transit, marinas, and boat rentals.

³ The marine economy comprises ocean-related NAICS codes for water transport (for all purposes), the fishing industry, and the boat/building industry.

employment tied to ocean recreation and tourism may be sensitive to offshore wind development (Landry et al., 2010; Schulman and Rivera, 2009; Gabriel et al., 2009; MMS, 2009; Mackinson et al., 2006; Kuehn, 2005; MORI Scotland, 2003).

- **Tourism accounts for a large percentage of the location's economy.** Because of the potential impact of offshore wind development on tourism, counties with significant employment in the tourism sector may be particularly sensitive to offshore wind development (Landry et al., 2010; Schulman and Rivera, 2009; Gabriel et al., 2009; Mackinson et al., 2006; Kuehn, 2005; MORI Scotland, 2003).
- **The location has a large number of establishments related to coastal/water recreation.** Coastal geographies with a large number of establishments related to coastal/water recreation may be sensitive to impacts from offshore wind development because of the potential for wind activity to affect coastal/water recreation (Farrugia et al., 2010; Danish Energy Authority, 2006; MMS, 2009; Gabriel et al., 2009; Mackinson et al., 2006; Maes et al., 2005; Kuehn, 2005; Mackinson et al., 2006).
- **The location has a high percentage of natural or historic/cultural areas.** Research indicates that users of coastal areas that are preserved natural or historic areas may be more sensitive to offshore wind development than users of developed coastal areas (Lilley et al., 2010; Jones and Eiser, 2010; Schulman and Rivera, 2009; Riddington, 2008; Kuehn, 2005).
- **The location has significant development along the coast.** Geographies with significant residential development along the coast may be particularly sensitive to impacts on viewsheds and changes to property values as a result of offshore wind development (Ladenburg and Moller, 2011, 2010; Ladenburg, 2009; Jones and Eiser, 2010; Hoen et al., 2009; Schulman and Rivera, 2009; Firestone and Kempton, 2007; Kuehn, 2005; Haughton et al., 2003).

Metrics, Scoring Factors, and Weights

ICF operationalized the selected criteria using specific metrics, scoring factors, and weighting factors. The term “metrics” refers to the data elements used to evaluate a given criterion. Each criterion is evaluated on three or four metrics. Metrics include economic (based on relevant industries), social, and spatial variables that have an impact on the vitality of the geography’s tourism and recreation sector or the amenity appeal of the location. Metrics can be continuous or categorized, as is explained below.

“Scoring factors” refers to the points awarded to a particular metric. Each metric is designed to provide a measure of the potential impact offshore wind development could have on a coastal geography. The metrics are designed so that there is a positive correlation between the assigned score and the potential for significant impacts (positive or negative) from offshore wind development. Because of the wide variety of data types across the metrics, we employed multiple approaches to scoring the data. Two approaches are used to “score” continuous measures (e.g., percent of a county’s economy related to a specific industry): a bin, and a decile-based approach. Both approaches were designed so that the scoring factors yield a range of 0 (or 1) to 10. An

important consideration we used in setting the scoring factors was the ability to create “separation” between the coastal geographies. In other words, the distribution of scores must be spread out enough to support the study’s objective of reducing the set of all geographies into a smaller set of the highest-ranked ones—which would not be possible if many areas earned the same final score. To do this, the distribution of the data was used to determine which of the two approaches was used. In instances where the data range was wide, we used the bin approach. The bin approach involved sorting raw data into 10 roughly equivalent groups labeled “bins” and indexing them from 0 (or 1) to 10 accordingly. For all other instances, the decile approach was used. For this approach, we ranked the geographies from highest to lowest based on the raw metric and then assigned a decile-based score (i.e., 1 for the lowest 10 percent of sectors, 2 for the next lowest 10 percent of sectors, and so on). The deciles approach was used for a majority of the metrics.

We then applied “weighting factors” of high, medium, or low to assign greater or lesser weight to metrics. The weighting factors represent our best judgment on the relative importance of each criterion. For example, we assigned a weight of 2 to metrics perceived to be of high importance; a weight of 1 to metrics perceived to be of medium importance; and a weight of 0.5 to metrics perceived to be of low importance. Thus, heavily-weighted metrics are counted as four times more important than those assigned a weight of low. Similarly, medium-weighted metrics are counted as twice as important as those assigned a weight of low.

The tables in Appendix B summarize the criteria, metrics, scoring factors, and weighting factors used in the analysis, along with justification for the weights assigned to each criterion and metric.

To score each coastal geography, each metric value was multiplied by its respective scoring factor, and weighted appropriately. The results were summed across all metrics to yield the location’s overall score. Because data were not available for the same number of metrics for all locations, the overall scores were then divided by the number of contributing metrics for each location, to provide an average per metric weighted score. Coastal geographies were then ranked by this average per metric weighted score, with the highest scores predicting the counties most sensitive to impacts from offshore wind development.

Geographies of Analysis

The list of geographies for analysis included coastal counties along the eastern seacoast as well as “hotspots” within these counties. ICF identified 125 geographies; through subsequent consultation with BOEM, the list was narrowed to 113 geographic areas. Appendix C presents the list of the 113 original geographies for analysis. Finally, we performed the scorecard analysis and obtained a list of 70 of the highest ranking geographies to analyze in the community profiles.

To identify the original 125 geographies, ICF refined a list of geographies provided by BOEM by including other inland counties that have a significant tourism volume. Tourism to inland counties could be impacted if the volume or character of marine tourism in the coastal county is positively or negatively affected by offshore wind development.

We also identified hotspots within the list of potentially impacted counties. Hotspots are locations within a county with unique economic, social, or physical characteristics that distinguish them from the county to which they belong. Hotspots allowed us to assess local-level sensitivity to wind facility development, which might not be accurately represented, if captured at all, in the county-level analysis. To identify hotspots, we conducted a visual survey using Google Maps and developed a list of communities within each county that were distinct from the surrounding county in terms of:

- Dependence on a specific type of tourism or marine activity,
- Presence of historic or tribal landmarks, and
- Reputation for natural landscapes.

After identifying approximately 20 hotspots, we conducted a preliminary scorecard analysis to determine if appropriate data were available at the sub-county level. To conduct a useful analysis, it was critical that comparable data exist across hotspots and counties for the scorecard to accurately evaluate the geography's sensitivity.

We concluded that much of the data used to analyze counties (e.g., from Bureau of Labor Statistics databases) were not available for hotspots, and datapoints for counties and hotspots were not fully compatible with each other. The data sources used to populate the scorecard analysis generally provided information down to the county level but did not provide enough granularity to evaluate hotspots. Thus, analysis at the hotspot level would have required significantly greater effort and resulted in reduced data accuracy. As a result, where data were not comparable, they were weighted accordingly to account for missing variables.

Although the scores are weighted to account for missing variables, one of the hotspots—Ocean City, Maryland—did not rank in the top 70 geographies (rank #83). After a manual review of the top-ranking 70 counties and the remaining 43 geographies, ICF proposed to BOEM to include Ocean City for further analysis instead of Glenn, Georgia (rank #70). Based on the level of effort required to collect the data and data availability, we determined that it was not feasible to conduct scorecard analysis for all hotspots. In particular, very small geographies and national/state parks could not be evaluated due to data limitations. Consequently, ICF worked with BOEM to identify four hotspots of particular tourist interest: Block Island, Rhode Island; Myrtle Beach, South Carolina; Ocean City, Maryland; and Rehoboth Beach, Delaware.

It should be noted that the list of sub-counties was not a comprehensive representation of sensitive sub-county coastal communities. Rather, the hotspot analysis was a demonstration that, given available data, sub-county-level analysis could identify local sensitivity that would not otherwise be captured in county-level analysis.

Data Sources

ICF relied on the following data sources for much of the scorecard analysis:

- *Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW)*. We obtained 2010 employment data for each relevant NAICS code and geography of

analysis (e.g. FIPS code for counties and zip code or MSA for hotspots). The QCEW provides files with extensive economic data organized by various geographic units and industry. In some instances, for the more granular NAICS codes and smaller geographies in particular, employment and/or establishment information was not reported. We do not believe this introduced any methodological issues because the number of observations in these instances was small, and thus the impact of the suppressed data was minor. Any lack of data did not influence the scoring of a location's sensitivity to wind energy development; the data points – or any other replacement metrics – were not included for those geographies where they were unavailable. Because the number of observations in these instances was small and the impact of the suppressed data was minor, we do not believe this introduced any methodological issues.

- *InfoUSA*. We used InfoUSA data to capture establishment-specific data on surf and diving-related establishments, water sports, and yacht clubs. InfoUSA is a data gathering company that has establishment-specific data (used mainly for marketing purposes). InfoUSA data are particularly useful for this type of analysis as they provide establishment-level information at the highly-granular Standard Industry Classification (SIC) level and complete geographic information (street address and latitude/longitude for GIS mapping purposes). The data were filtered by an InfoUSA representative using relevant SIC codes and keywords. We then performed a quality check to confirm the relevance of the resulting data set. We experienced limitations using the InfoUSA data due to data completeness issues and did not feel that the InfoUSA database accurately represented the volume of relevant establishments. Thus, we adjusted the scorecard weighting to reflect our data confidence concern.
- *U.S. Census Bureau 2009 County Business Patterns (CBP) and 2009 ZIP Code Business Patterns (ZBP)*. We utilized data from the CBP and ZBP databases to obtain establishment counts for each geography. The CBP and ZBP websites provide data tables for the total number of establishments by industry and a breakdown of these counts by establishment size. The NAICS establishment data classifies establishments by employment-size class using bins. We classified establishments that fall in the 1 – 4 and 5 – 9 employment-size class bins as “small.”
- *National Marine Fisheries Service*. We contacted the National Marine Fisheries Service, Fisheries Statistics Division to obtain county-level data on the number of annual (2010) anglers. The division completed a customized data run for the relevant coastal counties. Our scorecard weighting accounted for the fact that the data are not able to distinguish between coastal and inland fishing. Also sub-county results were not available.
- *U.S. Census Bureau Population and Economic Census*. Our GIS team used demographic data extracted from the U.S. Census records to calculate various spatially-related metrics such as housing and establishment density in the immediate coastal zone.
- *GIS Shapefiles*. We used shoreline data from BOEM and other public sources (ESRI, National Oceanic and Atmospheric Administration (NOAA), and Department of Homeland Security (DHS)) as appropriate. The choice of shoreline data was dictated by

the spatial resolutions available from the different sources. Data related to state and federal lands and historic areas were extracted from ESRI public-domain geodatabases and various state GIS agencies.

- *Other.* We used various location-specific visitation data captured through desk research, from sources that included state and local tourism boards, regional and local chambers of commerce, and other state government data sources.

Scorecard Data Template

The scorecard analysis relies on comparable data across all of the geographies of analysis for each scorecard metric. Data collection was a two-step process: first, we created the data collection template, which helped maintain a standard across all geographies; then, we populated the template.

We developed an Excel-based template to organize the scorecard data. The template consists of five worksheets for inputs and one worksheet for the calculated metrics. For all worksheets, the geographies of analysis are listed in rows, along with the respective state and the identifying Census code used to retrieve data for that location (i.e., county code, Zip Code, Metropolitan Statistical Area (MSA) code). Each of the five inputs worksheets corresponds to a unique data set (discussed above):

- North American Industry Classification System (NAICS) employment data;
- NAICS establishments data;
- InfoUSA data;
- Geographic information systems (GIS) queries; and
- Other.

NAICS inputs worksheet. The two “NAICS inputs” worksheets—employment and number of establishments by industry—contain individual tourism- and marine-related NAICS codes.

InfoUSA inputs worksheet. The worksheet titled “InfoUSA inputs” contains the number of surfing and diving establishments, fishing licenses, and yacht clubs along with establishment-specific data from InfoUSA. The final counts by establishment type for each geography were recorded in the corresponding cells in the “Info USA inputs” worksheet in the scorecard data template.

GIS inputs worksheet. The “GIS inputs” worksheet captures spatial data obtained through GIS queries, including the percentage of county perimeter that is coastline and establishment density with a half-mile buffer zone of the coast. Our GIS team calculated many of the spatially-related metrics in this worksheet.

Other inputs. The “Other inputs” worksheet includes population and visitation data, as well as information on parks and wildlife refuges, retrieved from a variety of location-specific sources.

Calculated metrics values. The final worksheet is titled “Calculated metrics values” and consists of one column for each scorecard metric. The column is self-populated using formulas that pull data from the inputs worksheets and calculate the values for the various metrics. For example, Metric 1b is the percentage of the tourism economy associated with the Marinas NAICS code. The formula pulls values from the “NAICS inputs – Employment” worksheet and divides the employment for the Marinas code by the total employment in the tourism sector.

After collecting all of the data and running the scorecard analysis, we determined that the data available for a few of the metrics were so limited that it warranted removal from our analysis. Specifically, no consistent or comparable data source across geographies exists for these three metrics: Total Visitation to Geography (3c), National/State Park Visitation (5d) and Historic/Cultural Area Visitation (5e). For some geographies, we found no data for these metrics and, for others, the data were not comparable across geographies because of the method or timeframe of data collection. While we recognize the importance of these metrics to the potential sensitivities of the geographies to offshore wind development, the poor data quality made it impossible to use these metrics in our analysis.

3.2 PROFILE METHODOLOGY

Based on the key criteria identified in ICF’s literature review of a location’s sensitivity to offshore wind energy development, ICF developed a template and authored profiles for each of the 70 counties and hotspots identified as the highest ranking geographies by ICF’s scorecard analysis. Many of the data sources for the profiles are identical to those used to complete the scorecard data template.

The purpose of the profiles is not to explicitly discuss the location’s sensitivity to offshore wind energy development. Instead, the profiles provide a broad background of each county’s ocean recreation and tourism economy. The narrative profiles provide information on which aspects of a location’s economy could be affected, which can be used to assess whether a county is more or less sensitive to offshore wind development. Although the purpose of the profiles is to provide a contextual background for understanding a location’s sensitivity to offshore wind energy development, ICF structured the profiles so that they can be used for other, non-wind energy issues that relate to a location’s coastal economy.

Profile Structure

Each profile contains seven sections with economic, social, and tourism-related information about the county, as well as an eighth section for references. The profiles for counties and hotspots, as well as a technical user’s guide for navigating the profiles, are included in Appendix E of this report.

Synopsis. Each profile begins with a two-paragraph synopsis of the county. The synopsis notes any unique characteristics of the county and summarizes important coastal or tourism-related statistics. Each of the characteristics and statistics mentioned in the synopsis is discussed later in the profile in greater detail.

Location. Section two highlights the geographical aspects of each county such as land area, nearby metropolitan areas, and highways and public transportation options. Counties close to and

with easy access to major metropolitan areas often cater to tourists seeking certain amenities, such as historical or national monuments, whereas remote counties, such as island counties that are accessible by plane or boat only, often cater to those seeking different amenities, such as sparsely-populated, isolated beaches.

Demographics. Section 3 includes tables with economic and social statistics from the U.S. Census Bureau. While the demographics of the tourist population are not captured here, ICF believes it is possible to make inferences about a county's tourist population based on the characteristics of the local population and its economic makeup. For example, the average home value in Nantucket County is over \$1 million and nearly 60 percent of all homes in that county are for seasonal or recreational use. These data suggest that Nantucket attracts a particularly wealthy tourist crowd.

Historical Context of the Economic Traditions. Whereas sections 2 and 3 provide a more general background of each county, sections 4, 5 and 7 focus specifically on the coastal and tourism environments in each county. Section 4, Historical Context of the Economic Traditions, discusses the county's history as it relates to modern development patterns, festivals and celebrations. Historical attractions greatly influence tourism. For example, a county that developed around a significant war or maritime history will likely attract tourists seeking different amenities than a beach resort county.

Coastal Amenities. Section 5 describes the nature of the county's coastline in the context of the three previous sections. This section states the length of the coastline and lists the shore-side amenities, including the beaches, national parks, wildlife refuges, yacht clubs, marinas, and other similar attractions.

General Economic Situation. The sixth section provides background information for section 7. The data provided in this section include the size of the economy (based on total number of business establishments), major employers (where available), and major industries in the county.

Coastal Tourism/Recreation Activity. The seventh section of each profile expands on the content in the previous six sections. The first half of this section contains much of the information that one might find in tourism brochures, chamber of commerce websites and other promotional materials; it discusses popular beach, park and ocean-side attractions and activities. These were included, in accordance with the findings from our literature review, based on whether or not ICF believed them to be indicative of a heightened sensitivity to offshore wind energy development. For example, those visiting less populated, remote beaches generally have more negative perceptions of offshore wind energy development than those visiting boardwalk beaches or other populated areas. Although some of the coastal activities and amenities discussed may not carry obvious implications regarding perceptions of wind energy development, they were included, where applicable, to offer a more holistic background of each county's ocean-side culture.

The second half of section 7 provides more data specific to the location's ocean and tourism economies. As a whole, section 7 provides an understanding of the role that ocean tourism – and specifically which aspects of ocean tourism – plays in the county's economy as a whole. It is

important to remember that offshore wind energy development could create a tourist activity draw, such as boat tours through the wind facility and diving at turbine foundations that serve as artificial reefs. Locations that already have boat tours and diving activities may see the presence of a wind facility as an asset by increasing tourism opportunities.

3.3 GEOGRAPHIC INFORMATION SYSTEM (GIS) DATABASE

To accompany the profiles of the 70 counties, the ICF GIS team created a geodatabase that includes amenities, attractions, and other coastal-specific data for all of the counties. The sources of information used by the ICF team and the structure of the database are described below.

Data Sources

To complete the database, ICF used sources that tied the relevant data to geographic locations. The data sources for the GIS included:

ESRI Maps and Data

- County locations and boundaries
- Detailed coastline
- Parks

GeoLytics

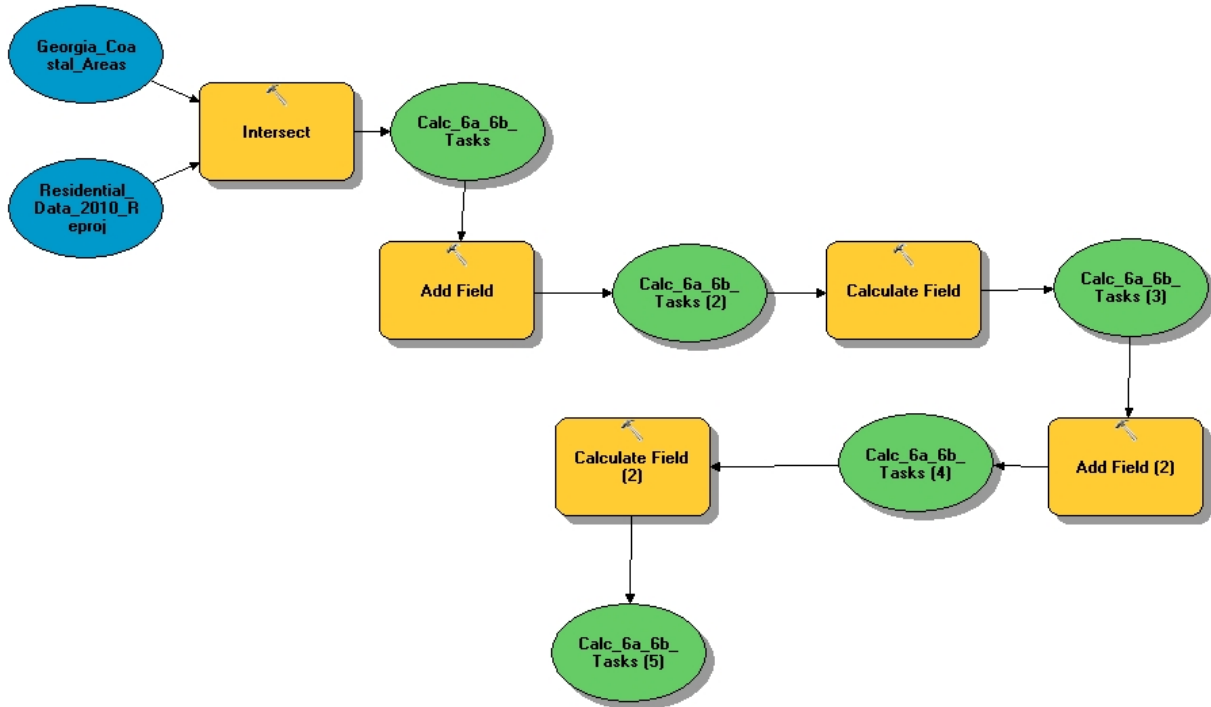
The GeoLytics data⁴ consist of commercially available census data extracted from the 2010 Census residential data. We converted the raw GeoLytics data following these four steps:

1. Calculated the percentage of a location's coastal area that is designated as a state park, national park, or preserve:
 - a. Selected parks that intersected shoreline within coastal counties.
 - b. Determined park area vs. county, then calculated a percentage.
2. Calculated the percentage of a county or location perimeter that is coastline.
 - a. Compared the perimeter of county and length of shoreline to arrive at a percentage.
3. Calculated residential density within one-half mile buffer of shoreline (Exhibit 1):
 - a. Created a one-half mile buffer of shore per location.
 - b. Intersected the county and buffer.
 - c. Performed a proportional overlay of the two to generate a residential density for each location.

⁴ <http://www.geolytics.com/>

4. Calculated the percentage of residential properties that could be second homes:
 - a. Extracted homes designated as second homes from Census data.
 - b. Compared second homes to total residential properties, and calculated a percentage.

Exhibit 1: Proportional Overlay Model



GIS Database Structure

All project-related spatial data are contained in an ESRI file geodatabase.⁵ The current file geodatabase tables are presented in Appendix D. The file geodatabase is a common data storage and management framework for ESRI ArcGIS combining spatial data with related data repository capabilities. Geodatabases allow storage, access, and management of GIS data in a central location in desktop, server, or mobile environments. The file geodatabase is suitable for single-user GIS data and offers performance and data management advantages over the more basic personal geodatabases. File geodatabases lack some features available in ESRI, a more advanced multiuser geodatabase architecture, but do not impose extensive software requirements. The increased software requirements for ESRI multiuser geodatabase architecture restrict flexibility in single-user use and data distribution making multiuser architecture impractical for the BOEM county profile geodatabase. The file geodatabase format, however,

⁵ See geodatabase, "BOEM_County_Profile_Data.gdb"

has two distinct disadvantages for the BOEM county profile database: lack of centralization and versioning.

During our initial analysis, data were collected and compiled using the scorecard analysis on Excel workbooks. To generate maps and spatial analyses, the data were imported into the ESRI file geodatabase format. However, the scorecard and underlying spatial data remain distinct and decentralized. Any changes in data must be carefully synchronized and quality controlled between the Excel data and the underlying spatial database to ensure that the spatial data analysis, maps and scorecards remain consistent. The process for generating this initial analysis is shown in Exhibit 2.

Exhibit 2: Initial Spatial Analysis Data Flow

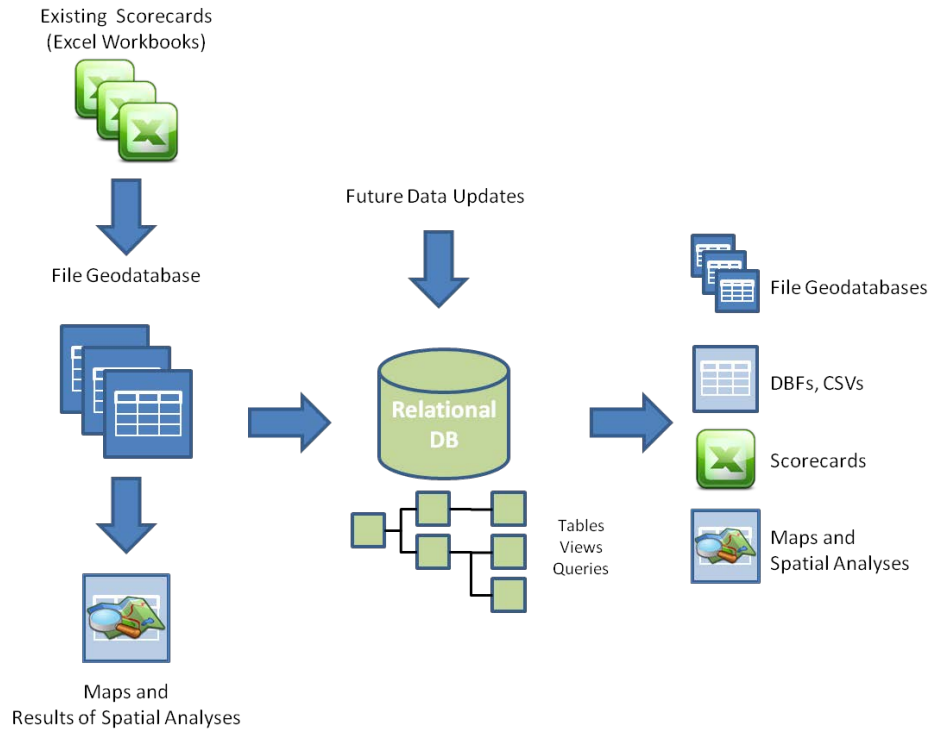


Because the BOEM county profile database is expected to evolve as new data become available and as additional data analyses are planned, building the geodatabase format to allow for more functionality was preferred. Thus, ICF created a centralized and relational database capable of receiving data updates and regenerating the data sets, as well as analyzing the data in multiple formats.

The file geodatabase format also does not allow versioning control. Versioning control allows for multi-user or simultaneous access, tracking of data updates, and refreshing of spatial maps and data analyses. In a file geodatabase, updates to the underlying data are possible but overwrite previous data. Overwriting previous data makes tracking of data changes and updates difficult and requires extensive quality control systems to ensure all maps and spatial analyses reflect the most recent data updates. Versioning allows maps and spatial analyses to be based on previous data or latest update and to track changes that are made. In addition, by allowing for versioning, the BOEM county profile database will allow for documentation of the current profile as the baseline and tracking subsequent changes.

To address these issues, ICF created a centralized and relational database capable of receiving data updates and regenerating the data sets and analyses in multiple formats, including file geodatabase data and updated Excel scorecard. The diagram shows the final database format, which allowed for easier updating, tracking, and refreshing of data for all types of analysis.

Exhibit 3: Relational Database Data Flow for Updated Analysis



4. FINDINGS

4.1 RANKED GEOGRAPHIES

Using scorecard analysis, ICF ranked the 113 geographies that were identified by the team as potentially sensitive communities. The rankings were based on the weighted scores for the metrics described in section “Metrics, Scoring Factors, and Weights” and listed in Appendix B. The rankings were not intended to create a definitive hierarchy among the geographies. Rather, they provide general insight about the geographies that would most likely be sensitive to impacts from offshore wind development. From the rankings, ICF generated a list of the top 70 highest ranking geographies, to be further analyzed in community profiles.

Every state that appeared in the original list of 113 geographies was also represented in the list of the top 70 geographies. Georgia had the fewest counties (three), while Maine and North Carolina had the largest number of counties on the list (nine each).

Although they did not rank in the top 70, Ocean City, Maryland (hotspot) and Colleton County, South Carolina were added to the list of geographies to be further analyzed in community profiles. They replaced Glynn County, Georgia and Penobscot County, Maine. ICF performed these substitutions because it was determined that Ocean City and Colleton County, which contains the resort town of Edisto Beach, demonstrated unique characteristics that warranted further analysis and might not have been captured in the quantitative data.

The top 70 geographies (and Ocean City and Colleton County) are presented in Exhibit 4.

Exhibit 4: Top Ranked Geographies

State	Location
Connecticut	Fairfield County
	Middlesex County
	New Haven County
	New London County
Delaware	Kent County
	New Castle County
	Rehoboth Beach (hotspot)
	Sussex County
Georgia	Camden County
	Chatham County
	<i>Glynn County*</i>

State	Location
Maine	Cumberland County
	Hancock County
	Knox County
	Lincoln County
	<i>Penobscot County</i> [^]
	Sagadahoc County
	Waldo County
	Washington County
	York County
Maryland	Anne Arundel County
	Calvert County
	<i>Ocean City (hotspot)</i> *
	Queen Anne's County
	Somerset County
	St. Mary's County
	Talbot County
	Worcester County
Massachusetts	Barnstable County
	Bristol County
	Dukes County
	Essex County
	Nantucket County
	Norfolk County
	Plymouth County
	Suffolk County
New Jersey	Atlantic County
	Cape May County
	Hudson County
	Monmouth County
	Ocean County
New York	Kings County
	Nassau County
	New York County
	Queens County
	Suffolk County
	Westchester County

State	Location
North Carolina	Brunswick County
	Carteret County
	Craven County
	Currituck County
	Dare County
	Hyde County
	New Hanover County
	Onslow County
	Pender County
Rhode Island	Block Island (hotspot)
	Bristol County
	Kent County
	Newport County
	Providence County
	Washington County
South Carolina	Beaufort County
	Charleston County
	<i>Colleton County</i> [^]
	Georgetown County
	Horry County
	Myrtle Beach (hotspot)
Virginia	Accomack County
	Northampton County
	Virginia Beach Independent City
	Westmoreland County

*Ocean City, Maryland was added to the list of geographies to be analyzed in a community profile. It replaced Glynn County, Georgia.

[^]Colleton County, Georgia was also added to the list, replacing Penobscot, Maine.

4.2 SUMMARY OF PROFILE FINDINGS

ICF collected quantitative and qualitative information for the 70 highest ranking coastal counties and hotspots (with Ocean City, Maryland replacing Glynn County, Georgia and Colleton County, South Carolina replacing Penobscot County, Maine) and compiled the information into community profiles. The profiles provide information on physical and socioeconomic conditions and may be used to identify potential sensitivities in the tourism and recreation sectors to impacts from offshore wind development. In particular, the profiles provide information related to four factors that could affect sensitivity to offshore wind development: (1) county geography; (2) stakeholders; (3) unique county attractions; and (4) tourism and recreation activities.

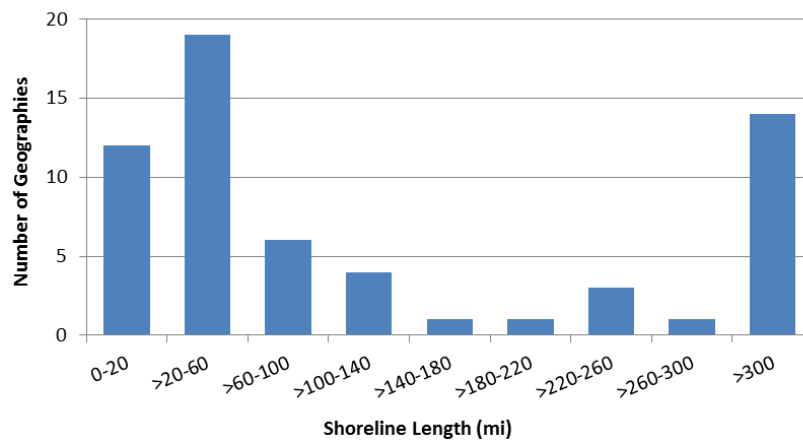
This section highlights patterns among the profiles. It also explains the relationship between each data point and the potential sensitivity that could result from the given physical or demographic

characteristic. These relationships were derived from ICF’s literature review and are a basis for the profile analyses.

County Geography

“County geography” refers to the nature and arrangement of the physical features in a county or hotspot (herein referred to as county). The profiles include information on two aspects of county geography: coastal attributes (e.g., length and accessibility of the shoreline), and land use. The profiles indicate that the 70 analyzed counties vary in terms of shore length (see Exhibit 5 below). Some counties have extensive coastlines. For example, both Somerset County, Maryland and Hancock County, Maine have approximately 1,100 miles of shoreline. Other counties—including Hudson County, New York and New Castle County, Delaware—have minimal coastal exposure (i.e., five miles or less). Of the counties for which data were available, about half have shorelines of less than 45 miles. Approximately one-fifth have shorelines that are longer than 500 miles. It is important to note that shoreline measurements include shoreline along creeks and rivers; consequently, these measurements might over-represent coastal exposure as it relates to offshore wind development.

Exhibit 5: Distribution of Shoreline Length (miles)



Source: Various location-specific sources.

Another coastal attribute included in the profile is shore accessibility. Some coastlines are easily accessible, while others are relatively inaccessible (e.g., the terrain is marshy or steep, transportation infrastructure is limited). Coastal attributes could affect the likelihood that a geography would be impacted by offshore wind development. For example, a longer and more accessible shoreline could increase a county’s sensitivity to visual impacts from an offshore wind facility.

In addition to coastal attributes, the profiles contain qualitative information about land use in each of the analyzed geographies. They describe the urban, rural, residential, or commercial character of the geographies and highlight major land-consuming industries (e.g., agriculture, military installations, manufacturing). Current types of land use could influence perceptions of

offshore wind development. For example, a geography with predominantly commercial land may be less impacted than a national park.

Stakeholders

There are two main categories of “stakeholders” that could influence a county’s sensitivity to impacts from offshore wind development: local population, and key employers. Local population includes year-round residents and seasonal populations.

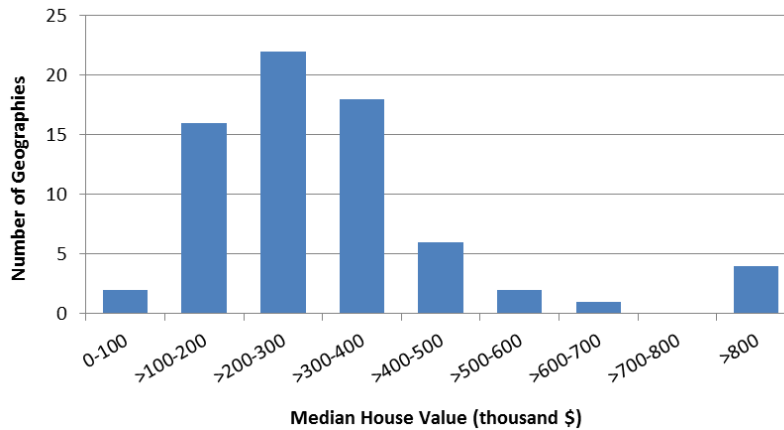
The profiles provide demographic information for the year-round population. Research indicates that demographic factors affect attitudes towards wind facilities (Ladenburg and Dubgaard, 2009). A few of the demographic measures included in the profiles are discussed below (i.e., population density, median age, poverty rates, unemployment rates, median house values).

Population density provides a measure of the number of people that could live within the viewshed, or area of impact, of an offshore wind facility. Population density varies significantly across the analyzed geographies, from a low of 9.5 people per square mile in Hyde County, North Carolina to a high of approximately 69,500 per square mile in New York County, New York. Half of the analyzed geographies have fewer than 400 people per square mile; the top five most densely populated counties have more than 12,000 people per square mile.

The profiles report the median age of the populations for each of the analyzed geographies. On average, the median age is 41 years. Median age ranges from a low of 25.7 years (Onslow County, North Carolina) to a high of 59.1 years (Rehoboth Beach, Delaware). The three geographies with the highest median ages are all hotspots: Rehoboth Beach, Delaware; Ocean City, Maryland; and Block Island, Rhode Island. ICF’s literature review found that the perception of offshore wind development correlates with age (Ladenburg and Dubgaard, 2009; Lilley et al, 2010). For example, a 2010 study indicated that younger respondents (under 30) in Delaware are about nine times more likely to visit a beach with an offshore wind facility than older respondents (Lilley et al., 2010).

Other socioeconomic indicators, including poverty rates, unemployment rates, and median house values, are presented in the profiles and provide additional details about the population in each county. The percentage of the population living in poverty ranges from 4.4 percent (Calvert County, Maryland) to 23 percent (Kings County, New York), with an average of 12.2 percent. This is lower than the national rate of 13.8 percent. According to the 2006 – 2010 American Community Survey, unemployment ranges from 2.2 percent (Nantucket County, Massachusetts) to 13.4 percent (Colleton County, South Carolina), with an average of 8.4 percent. Median house values for the analyzed geographies range from approximately \$90,000 to \$1 million, with a median of \$273,300 and an average of approximately \$321,600. Exhibit 6 below presents the distribution of median house values in the analyzed counties.

Exhibit 6: Distribution of Median House Value (Thousand \$)



Source: U.S. Census Bureau, 2010.

The socioeconomic conditions of a population could influence its perception of offshore wind development. For example, the population in a geography with high median house values could be more concerned about potential impacts on property values, while geographies with high unemployment rates could be more concerned with potential job creation impacts.

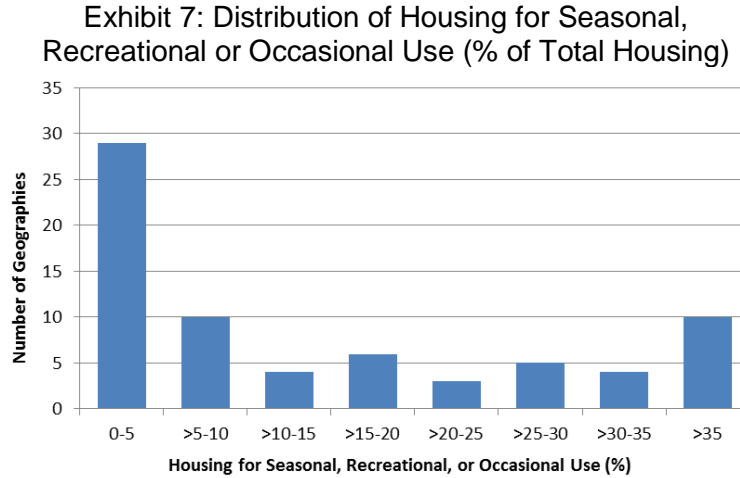
Where information is available, the profiles also provide information on current and past tribal communities in the area. In some of the coastal counties analyzed, there are no federally-recognized tribes.

In addition to year-round residents, the local population includes seasonal populations, which consist of tourists and seasonal residents (herein referred to as tourists). The profiles present information related to seasonal population change, including seasonal changes in tourism-related employment and the percentage of houses reported “for seasonal, recreational, or occasional use.” High values for these metrics would suggest that a county experiences seasonal influxes of tourists.

Seasonal (i.e., winter and summer) change in employment in leisure and hospitality industries can serve as a proxy for seasonal population change. In general, employment in leisure and hospitality industries increases from winter to summer, although the rate of change varies among geographies. Approximately one-quarter of geographies experience a minimal increase in leisure and hospitality employment (15 percent or less) between winter and summer. However, about one-fifth of geographies see an increase of more than 100 percent. Employment in leisure and hospitality industries decreases from winter to summer in only one county—Northampton County, Virginia. On average, employment in leisure and hospitality industries increases by 68 percent from winter to summer.

Another indicator of seasonal population change is the percentage of housing units that are described as “for seasonal, recreational, or occasional use” by the U.S. Census Bureau. On average, about 16 percent of the housing units in each county are described this way. Over half

of the geographies (39) have fewer than 10 percent of housing units for seasonal, recreational, or occasional use. In only five of the analyzed geographies are 50 percent or more of the housing units used seasonally or recreationally. Exhibit 7 below presents the distribution of the percent of seasonal, recreational, or occasional use houses in the analyzed geographies.



Source: U.S. Census Bureau, 2010.

Information about seasonal population change is important because tourists influence the character of a community and could affect its potential sensitivity to impacts of offshore wind development. For example, a large tourist base could increase a county’s sensitivity to impacts from offshore wind if tourists alter their travel patterns based on offshore wind facility locations. ICF’s literature review indicates that some tourists would be attracted by opportunities to view or tour offshore wind facilities (Kuehn, 2005; Mackinson et al., 2006; MORI Scotland, 2002; NIT, 2000; Westerberg et al., 2010), while other tourists might be deterred by alterations in the natural landscape and might choose a different destination to avoid the offshore wind facility and associated onshore operations (Landry et al., 2010; Lilley et al., 2010).

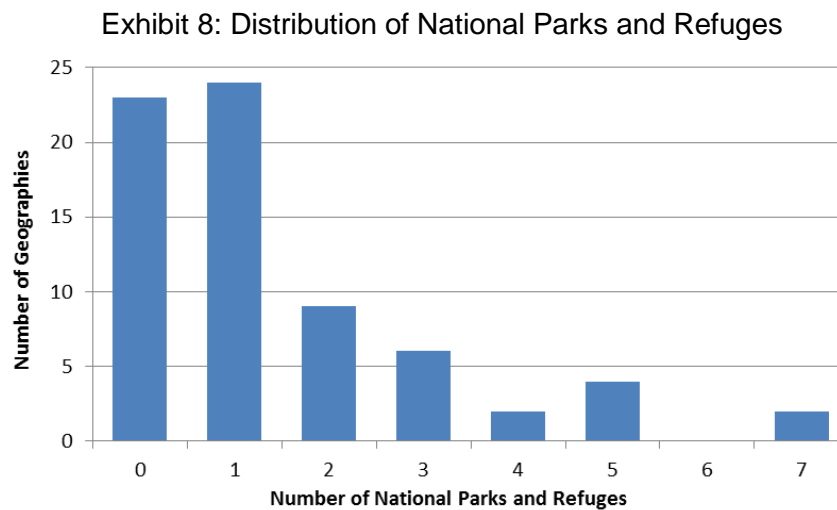
Alternatively, large seasonal population changes could mitigate the impacts of offshore wind development. According to research, the visual impacts of offshore wind facilities are lower during summer months due to reduced visibility. Thus, it is possible that summer tourists would be less affected by visual impacts than year-round residents or winter tourists. In this case, a county with a large seasonal population might be less affected by offshore wind development than a county with a more permanent population.

In addition to the local population, key employers are major stakeholders that could be affected by offshore wind development. The profiles list the principal employers for each of the geographies analyzed. County governments and school boards consistently rank as some of the top employers. Health care and defense sectors also appear frequently. For most of the geographies, tourism-related companies do not appear in the list of principal employers. However, tourism as an industry is reported as an important economic driver in many of the profiles.

Unique County Attractions

In the context of this analysis, “unique county attractions” include parks, historical sites, and tourism-related physical infrastructure (e.g., water parks, boardwalks).

The profiles report the presence of national parks and refuges in the analyzed geographies. Approximately two-thirds of the geographies have one or more national parks or wildlife refuges. The average is one national park or wildlife refuge per county. Many of the coastal wildlife refuges serve as important natural tourist attractions where visitors can observe wildlife and engage in outdoor sports. It is important to note, however, that the profiles do not consistently report the number of state or local parks which, in some cases, represent a significant portion of the location’s natural area. Exhibit 8 below presents the distribution of the number of national parks and refuges in the analyzed counties.



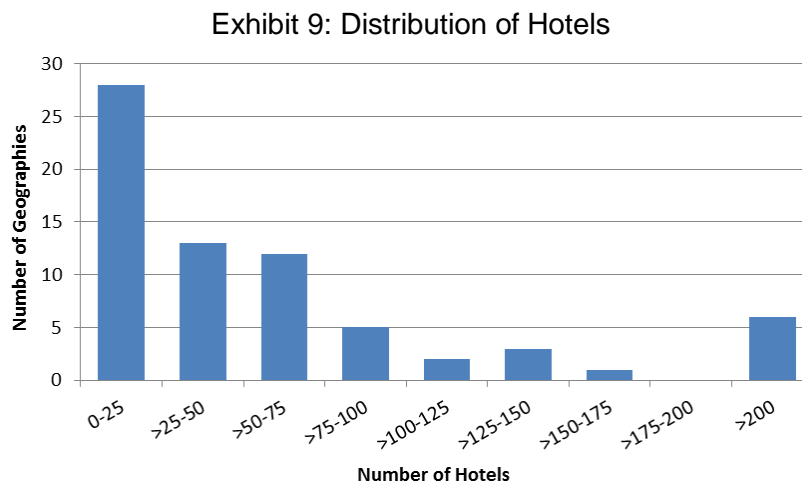
Source: National Park Foundation, 2012 and U.S. Fish and Wildlife Service, 2012.

The profiles also present information on regional history and historical sites. For many coastal communities, the regional history provides a foundation for community lifestyle, traditions, and events. This attracts both residents and tourists to the area. Historical landmarks also draw people to the area. Many of the profiles contain information on sites listed on the National Register of Historic Places, as well as historical sites preserved as national parks or monuments. Sites are located inland (e.g., historic architecture), on the coast (e.g., lighthouses), and offshore (e.g., shipwrecks). Research suggests that communities with historical areas could be more sensitive to impacts of offshore wind development. This could be especially true when historical sites are located within the viewshed or the areas of manufacturing and operations of offshore wind facilities. With respect to tourism, a county that preserves its historical sites and attracts tourists interested in “reliving” the region’s past could experience a change in tourism activity with the development of offshore wind facilities.

According to the profiles, geographies vary in terms of their tourism-related physical infrastructure. Some geographies offer minimal infrastructure. In these cases, any tourism to the

area might be focused on nature-based activities or community immersion. Other geographies are highly developed with tourism infrastructure and amenities (e.g., transportation networks, hotels, water parks, boardwalks, stadiums, marinas, yacht clubs, shopping, and dining venues). The extent and the nature of infrastructure development could be an indicator of a county's sensitivity to impacts from further development. For example, a highly developed coastline might be less affected by offshore wind development than an undeveloped area.

The number of hotels in a county can serve as an indicator of tourism-related infrastructure development, although it is not adjusted for county size. For the 70 analyzed geographies, the number of hotels ranges from 1 to 1,332, with half of the geographies having fewer than 36 hotels. See Exhibit 9 below for the distribution of the number of hotels in each county.



Source: U.S. Census Bureau, 2009.

Tourism and Recreation Activities

The “tourism and recreation activities” in a county could influence its sensitivity to impacts from offshore wind development. The profiles summarize the nature of recreation and identify some of the major community events. They also provide statistics on the size and significance of the tourism industry within each county.

Some counties provide a diversity of recreation options, while others offer a more focused selection. Several types of activities appear frequently in the profiles, including:

- Nature-based activities (e.g., birdwatching, kayaking, hiking);
- History-based activities (e.g., tours, museums) ;
- Cultural activities (e.g., festivals, community immersion, wine-tasting, dining);
- Sporting activities (e.g., surfing, hunting, fishing);
- Beach activities (e.g., shell collecting, sunbathing, swimming); and
- Boardwalk activities (e.g., arcade, amusement centers, shopping).

The profiles also provide information on annual festivals or events. Many of these events have a coastal or marine focus. For example, Carteret County, North Carolina offers the Big Rock Blue Marlin Tournament, a fishing competition with a \$1.6 million prize. Virginia Beach, Virginia hosts the North American Sand Soccer Championship as well as the North American Sandsculpting Championship and the Neptune Festival, which draws over 500,000 tourists to the shore.

Others events, however, center on cultural or historical traditions unrelated to the coast. As an example, Chatham County, Georgia is famous for its St. Patrick's Day Parade, one of the largest of its kind in the United States. It also hosts the Savannah Film and Jazz Festivals. Cape May County, New Jersey sponsors the Cape May Spring Festival, in which participants eat, drink, and shop in the county's small towns.

Geographies that host events focused on coastal and marine activities (e.g., fishing, water sports) might be more sensitive to impacts of offshore wind development, whether those impacts are positive or negative. Alternatively, geographies that draw crowds to events focused on other activities (e.g., music, food, onshore sports) might be less sensitive.

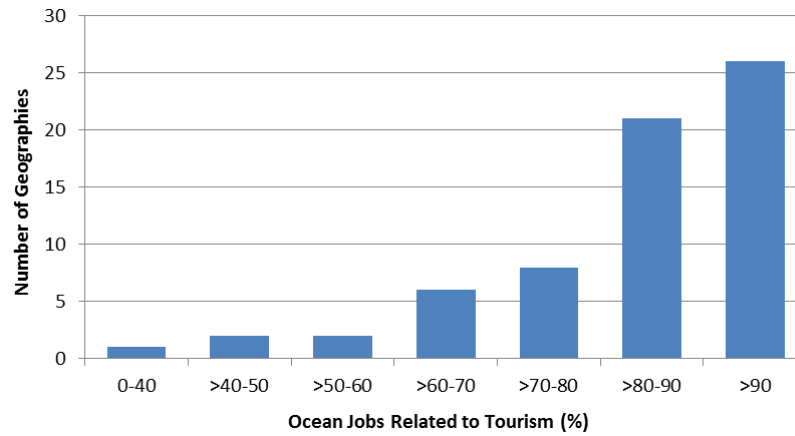
Finally, the profiles report several metrics for the size and significance of the tourism economy, including the amount of direct spending by tourists and the portion of ocean jobs that are related to tourism.

Information on annual direct spending in the tourism sector was available for 52 of the 70 analyzed geographies. The values ranged from approximately \$31 million (Hyde County, North Carolina) to over \$23 billion (New York County, New York) per year, with an average expenditure of \$1.96 billion per year. The sum of the annual tourism spending in the top three counties—New York County, New York; Worcester County, Maryland (home of the popular vacation resort, Ocean City); and Atlantic County, New Jersey (home of Atlantic City)—is approximately equal to the spending in all of the other counties combined. Excluding New York County, the spending in the top five counties—Worcester, Maryland; Atlantic County, New Jersey; Suffolk County, Massachusetts (home of the city of Boston); Queens County, New York; and Cape May County, New Jersey (home of the seaside resort, Ocean City)—represents over half of the tourism spending in all counties combined. It is important to note that these values do not provide any indication of the focus of tourism spending that would be sensitive to the impact of offshore wind development. For example, it is not possible to determine how much spending is related to coastal or marine activities.

The profiles also report the share of the ocean jobs that are connected to tourism (see Exhibit 10 below), which could be interpreted as the significance of tourism in the regional ocean economy. The share of ocean jobs related to tourism ranges from a low of 39.8 percent (Suffolk County, Massachusetts) to a high of 99.6 percent (Horry County, South Carolina). However, for three-quarters of the analyzed geographies, tourism-related jobs represent a significant portion of the jobs in the ocean economy (75 percent or more). On average, 84 percent of ocean jobs are connected to tourism. Although the ocean economy represents only a piece of the overall economy, this indicator is a useful measure of the county's sensitivity to impacts of offshore wind development because by defining the significance of the tourism industry as it relates to the

ocean economy only, it isolates the industries that would have the greatest exposure to offshore wind.

Exhibit 10: Distribution of Ocean Jobs Related to Tourism
(% of Total Ocean Jobs)



Source: National Oceanic and Atmospheric Administration, 2012.

5. CONCLUSION

This final report presents the analytical methods and findings of BOEM's study on coastal tourism and offshore wind development. The results of the study—the literature review, scorecard rankings, profiles, and data maps—provide information on the physical and socioeconomic conditions in 70 geographies along the eastern U.S. seaboard, with an emphasis on conditions related to coastal tourism and recreation.

According to ICF's literature review, socioeconomic impacts from offshore wind development can result from changes to the natural resources (e.g., altered fishing or surfing conditions) or from the public perception of offshore wind facilities (e.g., interest in facility tours, preference for undeveloped landscapes); they can be positive or negative. The literature also suggests that certain factors, such as age, income, and types of coastal recreation, can influence the magnitude of these impacts. ICF reviewed studies about potential and existing offshore wind projects and noted that anticipated impacts do not necessarily correspond with actual impacts. Information about socioeconomic impacts of offshore wind is limited, in part because the offshore wind energy projects in the U.S. are still in the development phase. Further research is necessary to better understand whether anticipated impacts do in fact become actual impacts. However, as wind energy projects become more common, it is likely that understanding of the beneficial and detrimental impacts of offshore wind will improve.

The findings of the literature review guided the development of the scorecard analysis methodology. ICF designed scorecard metrics to reflect the socioeconomic or physical conditions associated with potential sensitivity to impacts from offshore wind. ICF generated a list of counties and hotspots located along the eastern U.S. seaboard, collected data, and calculated scores for each geography based on the scorecard metrics. The highest ranking geographies were then described in narrative community profiles. Comparison of the profiles allows for identification of trends among the geographies. The profiles also facilitate identification of potential sensitivities to impacts from offshore wind development, related to four sensitivity factors: county geography, stakeholders, unique county attractions, and tourism and recreation activities. This information will be useful for policy-makers, community groups, and industry participants seeking to understand the relationship between coastal tourism and offshore wind development, as well as the potential geography-specific implications for offshore wind development along the eastern U.S. seaboard. The information can also be used to describe the expected effects a specific offshore wind development will have on the tourism and recreational economies in affected coastal areas.

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The Department of the Interior Mission



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The Bureau of Ocean Energy Management



The Bureau of Ocean Energy Management (BOEM) works to manage the exploration and development of the nation's offshore resources in a way that appropriately balances economic development, energy independence, and environmental protection through oil and gas leases, renewable energy development and environmental reviews and studies.

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Appendix A

Atlantic Region Wind Energy Development: Recreation and Tourism Economic Baseline Development, Literature Synthesis Report

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1 INTRODUCTION

1.1 ORGANIZATION OF THE SYNTHESIS REPORT

The purpose of this synthesis report is to identify existing data and studies on the effects of offshore wind projects on tourism and recreational economies. Because there are few studies measuring actual impacts on recreation and tourism associated with operating offshore wind facilities, this synthesis report also includes studies that analyze the public's perception of offshore wind facilities and how those perceptions may translate into effects on tourism and recreational uses.

The report is organized as follows:

- Section 1: Introduction
- Section 2: Change in Perceptions of Offshore Wind Facilities-Planning through Operational Phases
- Section 3: Visual (Aesthetics)
- Section 4: Recreation and Tourism Uses and Activities
- Section 5: Wind Facility-based Tourism
- Section 6: Tourism-related Property Values
- Section 7: Conclusion

1.2 INTRODUCTION

Recreation and tourism are major components of coastal economies along the U.S. Atlantic seacoast. There is widespread concern that the development of offshore wind facilities could change the character of the adjacent coastal areas sufficiently to cause tourists and recreational users to seek other areas or to not partake in coastal tourism altogether.

Coastal tourism and recreational economies are based on the natural setting and resources, public perception and, ultimately, the value people place on the use of these resources. Limiting access to or degradation of natural resources that draw tourists and recreational users will result in economic impacts on the tourism and recreation sectors. Possibly more importantly in the case of offshore wind development, a change in the public's perception of a location can also lead to economic impacts. Conversely, offshore wind facilities may provide a new source of coastal tourism and have the potential to draw new visitors to coastal areas.

To contextualize the potential impacts, Exhibit 1 presents a list of recreational uses and associated activities involved in coastal and marine recreation and tourism that could be affected by offshore wind development. Impacts to recreational and tourism economies will be felt as a result of limitations on these activities or choices made by consumers to not take advantage of these activities in a given area. The literature discussed in this synthesis report focuses on evaluating how changes in recreational and tourism use patterns occur with development of offshore wind projects.

Exhibit 1. Summary of Coastal Recreational and Tourism Uses and Activities

Recreational Use	Activities	
	Coastal	Offshore
General Beach Use	Sunbathing, swimming, walking, wildlife viewing, surfing	Not Applicable
Boating	Sailing, parasailing, motor boating, windsurfing, kite surfing, kayaking, jet skiing	
Fishing	From shore, fishing piers, near-shore boat-based	Deep sea fishing
Diving	Snorkeling	Snorkeling, diving
Wildlife Viewing	Birding, general wildlife viewing	Boat-based (whale watching)

Offshore wind facilities have been operating in Europe for 20 years, making European studies useful in evaluating potential future impacts in the U.S. Since recreational and tourism impacts are largely dependent on the public's perception of the wind facilities, Europe also provides the opportunity to look at how public perception evolves from the early phases of introducing project plans, through construction, and following years of operation.

Social impact studies related to offshore wind in the U.S. have been limited to forecasting potential impacts, as there are no operating offshore wind projects in the U.S. to date. These studies have surveyed recreational users and tourists to evaluate the anticipated reaction of these populations to offshore wind facility construction, operation, and decommissioning.

1.2.1 Construction, Operation, and Decommissioning Phases

The majority of evaluations of actual or potential impacts from offshore wind facilities on recreational and tourism activities have focused on the operational phase. However, the construction and decommissioning phases involve activities with potential to affect recreational uses, including:

- Increased vessel traffic (construction/support).
- Noise and visual/aesthetic effects on the marine viewshed from installation ships and cranes.
- Increased truck/vehicular traffic (equipment transportation to ports).

Impacts from the construction and decommissioning of a wind facility are addressed in relevant National Environment Policy Act (NEPA) decision making documents (or similar reviews outside the U.S.), but the documents include limited data on actual effects on recreation and tourism.

The operational phase involves new infrastructure in offshore waters. The infrastructure has the potential to directly interfere with recreational and tourism activities by limiting use of certain areas, and to indirectly interfere by changing local aesthetics, key factors in attracting tourists to a coastal area. However, no effect and potentially a positive effect on tourism and recreation have been demonstrated at operational facilities in Europe, including attraction of tourists to new

wind facilities. This synthesis report includes studies that investigate the potential and experienced effects of offshore wind facilities on the recreation and tourism economies.

The resulting effects on the recreation and tourism economy from the operational phase will stem from the following changes in aesthetics, offshore marine uses, and near-shore marine uses:

- **Visual (aesthetics)** - The presence of turbines on the marine horizon will result in changes to the viewshed. Overall effects depend on the number of turbines, the height and size of the turbines, their distance from shore, and the seasonal weather conditions.
- **Marine Uses (offshore)** - Navigation within the wind facility will be altered, thus affecting fishing, sailing, boating, and diving uses. Along with the loss of open water for marine uses, the turbines may act as artificial reefs, developing new ecosystems and attracting fish, thus enhancing some uses such as diving and fishing.
- **Marine Uses (near shore)** - Although the wind facility will not directly limit use of coastal and near-shore areas for tourism and recreational activities, the visual effects could result in changes to use of shoreline areas based on recreational users' perceptions of how the environment is altered. Also, depending on siting, wind facilities could affect wave energy coming onto a beach, thus altering wave-based activities (surfing and swimming).

Effects on natural resources would impact recreational activities and tourism that are based on these resources, such as wildlife viewing. Any impacts on natural resources will be site and project specific. The actual effects on natural resources are not addressed in this synthesis report except where there is literature discussing the direct or anticipated impacts on recreational and tourism economies.

2 CHANGE IN PERCEPTIONS OF OFFSHORE WIND FACILITIES – PLANNING THROUGH OPERATIONAL PHASES

A large part of the research on the potential effects of offshore wind facilities on recreational and tourism economies has focused on the public’s perception. This section provides an overview of surveys conducted to gauge support and attitudes for operational projects in Europe and proposed projects in the U.S.

2.1 EUROPEAN STUDIES – PERCEPTIONS OF OPERATIONAL WIND FACILITIES

Exhibit 2 presents an overview of survey-based studies performed to gauge attitudes toward offshore wind facilities in Europe. These survey-based studies are further discussed, along with non-survey-based studies, in following sections that examine different aspects of impacts on tourism and recreation.

Exhibit 2.
Surveys Conducted on Public Perceptions of Operating Offshore Wind Facilities in Europe

Author (Year)	Title	Location	Survey Sample Size
Ladenburg and Moller (2011)	Attitude and Acceptance of Offshore Wind Farms—The Influence of Travel Time and Wind Farm Attributes	Denmark	1,082
Ladenburg (2009)	Attitudes Towards Offshore Wind Farms—The Role of Beach Visits on Attitude and Demographic and Attitude Relations	Denmark	1,082
Ladenburg and Dubgaard (2009)	Preferences of Coastal Zone User Groups Regarding the Siting of Offshore Wind Farms	Denmark	Mail survey: <ul style="list-style-type: none"> • National - 362 • Horns Rev - 140 • Nysted - 170
Ladenburg (2008)	Visual Impact Assessment of Offshore Wind Farms and Prior Experience	Denmark	Mail survey: <ul style="list-style-type: none"> • National - 362 • Horns Rev - 140 • Nysted - 170
DONG Energy and Vattenfall (2006)	The Danish Offshore Wind Farm Demonstration Project: Horns Rev and Nysted Offshore Wind Farms Environmental Impact Assessment and Monitoring	Denmark	Interviews: <ul style="list-style-type: none"> • Horns Rev - 14 • Nysted - 12 Mail survey: <ul style="list-style-type: none"> • National - 362 • Horns Rev - 140 • Nysted - 170
Kuehn (2005)	Sociological Investigation of the Reception of Nysted Offshore Wind Farm	Denmark	26
Ladenburg et al. (2005)	Economic Valuation of the Visual Externalities of Off-Shore wind Farms	Denmark	Mail survey: <ul style="list-style-type: none"> • National - 362 • Horns Rev - 140 • Nysted - 170

Author (Year)	Title	Location	Survey Sample Size
Jones and Eiser (2010)	Understanding “Local” Opposition to Wind Development in the UK: How Big is a Backyard?	UK	428
Riddington et al (2008)	The Economic Impacts of Wind Farms on Scottish Tourism	Scotland (onshore wind project)	Internet survey - 700 In-person interview - 300
MORI Scotland (2003)	Public Attitudes to Wind Farms	Scotland (onshore wind project)	1,810
MORI Scotland (2002)	Tourist Attitudes Towards Wind Farms	Scotland (onshore wind project)	307
NIT*. (2000)	The Effect on Tourism of Onshore and Offshore Wind Farms in Schleswig-Holstein	Germany (planning stage)	General population – 2,000 Visitors - 446

*NIT = The Institute for Tourism and Recreational Research in Northern Europe

The paper “The Danish Offshore Wind Farm Demonstration Project: Horns Rev and Nysted Offshore Wind Farms Environmental Impact Assessment and Monitoring” (Dong Energy and Vatenfall, 2006) provides results of environmental studies (baseline and operational monitoring) conducted in conjunction with the environmental impact statement (EIS) for the Horns Rev and Nysted Wind facility projects. Study results on public acceptance are included in the report, although direct effects on tourism and recreational economies are not defined. The report includes results of a qualitative evaluation of public acceptance in 2003 published by Kuehn (2005), and the results of a poll conducted with 700 responses on attitudes toward the operating wind facilities. Respondents were from three populations: Nysted, Horns Rev, and a national group sampled throughout Denmark. The study results showed that an overwhelming majority of respondents (80 percent) had positive attitudes toward the offshore wind facilities. Support for Nysted was slightly lower, which was attributed to the wind facilities being closer to shore and more visible; impacts to tourism at Nysted were not evaluated. Respondents in both areas were generally in favor of building additional offshore wind projects.

Kuehn’s (2005) qualitative review of public dialogue in local press and interviews with a small group (12 interviewees in Nysted and 14 interviewees in Horns Rev) indicated no decline in the tourism industry, and the price of vacation rental properties was reportedly not affected. Before construction, public concern and opposition, particularly regarding aesthetics, were reportedly connected to the inability of respondents to visualize the wind facilities before they were built. Kuehn reported that one year after the project became operational, six pre-construction opponents accepted the project, indicating an increase in acceptance after residents became familiar with the aesthetic effects of offshore wind. However, due to the small sample size (26 interviewees), it is difficult to extrapolate these findings to overall perceptions of offshore wind (Keuhn 2005). These results are also discussed in a summary report prepared by the Danish Energy Authority (2006).

Ladenburg, along with various other authors, also published several papers between 2005 and 2011 on the public perception and attitudes toward offshore wind projects in Denmark, and the factors that influence these attitudes. These studies represent Danish populations living near operational large-scale offshore wind facilities. It should be noted that these papers are based on several analyses of the results of two surveys. One survey included 1,082 respondents and the

other more than 700 respondents. The publications are listed below and in Exhibit 2, and are further discussed in later sections of this report where relevant.

- Ladenburg and Moller (2011) reported that of 1,082 survey respondents, only 27 (2.5 percent) stated negative attitudes towards offshore wind facilities. In this paper, Ladenburg looked at the change in acceptance with distance from the respondents' residences to the nearest offshore wind facility. Results did not lead to a clear conclusion, likely due to the small number of respondents with a negative opinion.
- Ladenburg (2009) analyzed 1,082 responses to determine if differences in attitude towards offshore wind development were linked to the way a respondent used the beach. Respondents who frequently walk on beaches near offshore wind facilities tended to have a stronger negative or positive opinion than those who visited the beach less frequently; less frequent beach users tended to be more neutral.
- Ladenburg and Dubgaard (2009) analyzed 700 responses and found that demographic factors, including income, age, and education, along with the respondents' frequency of use, factor into attitudes towards wind facilities. Ladenburg concludes that offshore wind facilities may have a slightly negative impact on current recreational beach users, but a more positive impact on new users.
- Ladenburg (2008) compared perceptions of the Danish population as a whole versus the local populations living near the operating wind facilities at Horns Rev and Nysted (total sample size of 700). The Horns Rev sample had more positive attitudes towards offshore wind than the national and Nysted samples. A possible explanation for this finding is that Horns Rev is four miles further from shore than Nysted, indicating more acceptance of wind facilities located further from shore that have more limited visual impact.
- Ladenburg et al. (2005) reported the public's willingness to pay for siting offshore wind turbines further offshore to minimize visual impacts. This study found that 90 percent of the 700 Danish respondents viewed offshore wind facilities positively. Acceptance of offshore wind facilities was similar at Nysted and Horns Rev, but the authors reported a greater willingness to pay to site wind facilities farther offshore at Nysted compared to Horns Rev. This greater willingness to pay is attributed to the experience of respondents living near Nysted, which is closer and has greater visual impact than Horns Rev. The study did not include analysis of impacts on the recreational or tourism economies.

2.2 U.S. STUDIES – PERCEPTIONS OF WIND FACILITIES IN THE PLANNING STAGE

Exhibit 3 presents a list of the surveys conducted in the U.S. to gauge public opinion of proposed offshore wind projects. Results of these surveys are discussed under the appropriate factors in following sections.

Exhibit 3.
Studies of Effects of Potential Offshore Wind Facilities in the U.S. on Recreation and Tourism Economies

Author (Year)	Title	Location	Survey Sample Size
Krueger et al. (2011)	Valuing the Visual Disamenity of Offshore Wind Projects at Varying Distances from the Shore	Delaware	949
Lilley et al. (2010)	The Effect of Wind Power Installations on Coastal Tourism	Delaware	1,076
Firestone et al. (2008a)	Delaware Opinion on Offshore Wind Power	Delaware	955
Firestone et al. (2008b)	Public Acceptance of Offshore Wind Power Projects in the United States	Massachusetts Delaware	<ul style="list-style-type: none"> • Massachusetts-504 • Delaware-949
ESS Group (2007)	Appendix 3.23-B: Analysis of the Potential Socioeconomic Impacts of the Cape Wind Project on Recreational Fisheries Horseshoe Shoal, Nantucket Sound	Massachusetts	41
Firestone and Kempton (2007)	Public Opinion About Large Offshore Wind Power: Underlying Factors	Massachusetts	504
Battelle (2003)	Recreational Intercept Survey	Massachusetts	30
Houghton et al. (2003)	Blowing in the Wind: Offshore Wind and the Cape Cod Economy	Massachusetts	<ul style="list-style-type: none"> • Tourists-497 • Homeowners-501
Kempton et al. (2005)	The Offshore Wind Power Debate: Views from Cape Cod	Massachusetts	<ul style="list-style-type: none"> • Full interviews- 24 • Partial interviews- 12
Schulman and Rivera. (2009)	Survey of Residents and Visitors in Four Communities Along the Southern New Jersey Shore	New Jersey	<ul style="list-style-type: none"> • Atlantic City/Ventnor-491 • Brigantine-260 • Margate-252
Lieberman (2006)	New Jersey Shore Opinions About Off-Shore Wind Turbines	New Jersey (Monmouth, Ocean, Atlantic, Cape May)	4,026 (~1,000 in each county)
Landry et al. (2010)	Wind Turbines and Coastal Recreation Demand	North Carolina	361
Hagos (2007)	Impact of Offshore Wind Energy on Marine Fisheries in Rhode Island	Rhode Island	75

3 VISUAL (AESTHETICS)

As described in the Cape Wind Final Environmental Impact Statement (FEIS) (MMS, 2009), construction activities, including increased vessel traffic, noise, and construction activity on the marine horizon, have the potential to change the aesthetics of coastal and offshore areas, and to affect recreational activities and tourism. The construction phase can have varying durations, depending on the size of the project. For the projects being considered for the U.S. Atlantic seacoast, a lengthy construction phase on the order of several years is expected. Activities related to decommissioning of the wind facility would be similar to construction, with increased vessel traffic, cranes, and associated noise. As previously discussed, there is little information available on the impacts to the recreational and tourism industries from construction or decommissioning of an offshore wind facility. Due to this lack of available research, this section focuses only on impacts to aesthetics during wind facility operation, although research on this topic is also limited.

Beaches regarded as undeveloped are important tourist destinations and are often valued for their remoteness (Peregrine Energy Group Inc., 2008). An operating wind facility on a marine horizon could change the nighttime and daylight viewsheds (depending on its distance from shore and the weather conditions). During the day, turbines are typically visible, depending on distance from shore, and light markers on turbines at night change the evening view (Kuehn, 2005). A visual simulation of the Cape Wind project from the beach at Cotuit, Massachusetts is provided in Exhibit 4.

Exhibit 4.
Visual simulation of the Cape Wind project from the beach at Cotuit

Source: Cape Wind Associates



Opponents of offshore wind development argue that turbines change or spoil the aesthetic character of a region and can disrupt a visitor's enjoyment of the site, which in turn impacts the tourism industry negatively. However, several studies have found little to no impacts.

- The Horns Rev project enjoyed acceptance following one year of operation (Ladenburg et al., 2005; Danish Energy Authority, 2006).
- A Scottish study on effects of an onshore wind project on tourism found that no respondent mentioned the wind facility when asked without prompt about negative/positive aspects of the area; when asked directly about a wind facility, 12 percent said it spoiled the landscape, 20 percent said it was an overall positive aspect, and 7 percent said it was an overall negative (MORI Scotland, 2003).

However, even in Europe, where offshore wind facilities are becoming increasingly accepted, Gabriel et al. (2009) points out that opposition to offshore wind development is strong in certain locations. The authors cite the opposition and legal proceedings aimed at blocking wind development in the Wadden Sea as an example. Organized opposition was based on the expected visual effects on the marine horizon, including negative impacts on tourism in the area. Jones and Eiser (2010) also point out that concern for visual impacts is of primary importance for local acceptance in the U.K., and Ladenburg has found in Denmark that distance from the shoreline and visual effects are a major determinant to overall acceptance (Ladenburg and Moller, 2011, 2010; Ladenburg, 2009).

The following U.S. studies analyzed the potential impact of offshore wind development on visitor's perceptions of aesthetics:

- When asked about the effect of offshore wind facilities on a landscape, a 2010 study of 1,000 out-of-state tourists at Delaware beaches found that 20 percent of respondents were positive, 57 percent were neutral, and 23 percent were negative (Lilley et al., 2010).
- A 2009 study presented 1,003 visitors at New Jersey's Atlantic City Boardwalk with visual simulations of a wind facility and asked them what disadvantages the images presented. Seventeen percent of respondents found offshore wind facility to be an eyesore, while 11 percent indicated it obstructed the ocean view. However, 16 percent of respondents said that there was no difference. Overall, 66 percent said that an offshore wind facility would have a positive effect on the city and the local environment (Schulman and Rivera, 2009).
- A 2008 study of the visual impact of a proposed offshore wind facility off Delaware found that 100 percent of opponents and 41 percent of supporters considered the wind facility a visual disamenity. However, there was still high support for offshore wind development despite the visual effects. The study also reported that 84 percent of respondents would visit a new beach to see an offshore wind facility, and only 11 percent would switch beaches to avoid a view of offshore wind turbines (Firestone et al., 2008a).
- A 2005 study found that 16 percent of respondents opposed an offshore wind project on Cape Cod due to aesthetics, and that 72 percent of respondents expected negative impacts on aesthetics (Kempton et al., 2005).

- Haughton et al. (2003) poll of approximately 1,000 people found that approximately one-third of the respondents shown simulations of offshore wind facilities indicated that the wind facility “neither improved nor worsened the view” (32 percent of tourists and 28 percent of homeowners), and similar percentages (43 percent of tourists and 32 percent of homeowners) indicated that the wind facility in the visualization “worsens the view slightly.”

It is interesting to note that an expectation of a negative impact on aesthetics does not necessarily translate into opposition to offshore wind development, as evidenced by the findings of Kempton et al. (2005) and Firestone et al. (2008a).

A European study concluded that individuals who have been exposed to operating wind facilities are more accepting of them:

- Before construction and operations, a Danish study indicated that visitors’ reservations concerning offshore wind facilities were rooted in their inability to imagine what 110-meter-high wind turbines would look like before the project was built, but visitors accepted the wind turbines after construction (Kuehn, 2005).

Compared to other industrial coastline development, wind facilities are considered less of a visual disturbance than other coastal fixtures, such as landfill sites, industrial chimneys, derricks, or support installations (NIT, 2000). Offshore wind polled more favorably than fossil fuel power plants and, in a Delaware study, 61 percent of tourists indicated that they would visit a beach with a fossil fuel plant nearby, while 74 percent would visit a beach near an offshore wind facility (Rock and Parsons, 2010).

3.1.1 Distance to Wind Facility and Aesthetic Impact

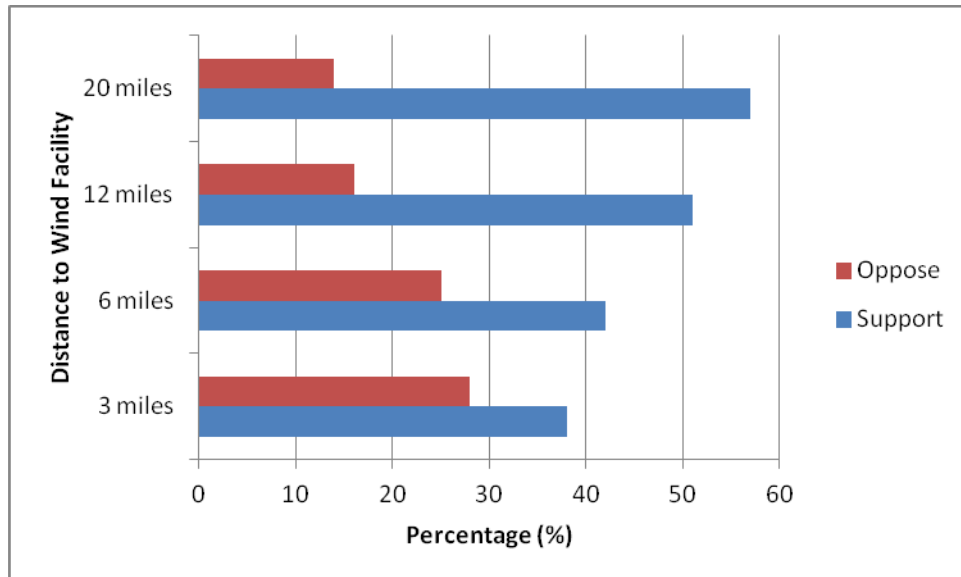
Although most studies point to overall acceptance of offshore wind development, there remains a strong preference to site wind facilities as far offshore as possible to minimize the effects to the viewshed (Ladenburg et al., 2005; Firestone et al., 2008b).

- A 2011 World Bank study on offshore wind development found that the most significant visual impacts are likely to occur within 5 kilometers (km) of a wind facility, and that public perception improves as the facility is sited farther offshore (Ledec et al., 2011).
- A 2010 study in Delaware found 25 percent of surveyed beachgoers would switch beaches if offshore wind turbines were sited 10 km offshore; 95 percent would return if wind facilities were sited 22 km offshore; and 99 percent would return if wind facilities were not visible from shore (Lilley et al., 2010).
- A 2008 study that estimated impacts of an offshore wind facility using written descriptions and photo-simulations of what an offshore wind facility would look like at varying distances (a choice survey), found that Delaware residents prefer that wind turbines be placed farther offshore. Ocean area residents have the greatest preference for wind turbines to be placed farther offshore, followed by Chesapeake Bay area residents and, lastly, inland residents (Firestone et al., 2008a).
- A choice survey of 370 tourists on French beaches in Languedoc Rousillon indicated that the impact of wind facility disamenity costs on tourist revenue would be zero if the wind

facility were to be located 8 to 12 km from shore (Westerberg et al, 2010). Consistent with other studies, there is a strong willingness to pay to site wind facilities further offshore in order to minimize visual impacts.

- A 2006 study in New Jersey reported increased acceptance of an offshore wind facility with distance of the project from shore. For a project sited three miles out from the coast, the difference between those in favor of the project (38 percent) versus those opposed to the project (28 percent) is relatively narrow. Positive perceptions increased at greater distances from shore: at 6 miles, 42 percent in favor versus 25 percent opposed; at 12 miles, 51 percent in favor versus 16 percent opposed; and at 20 miles, 57 percent in favor versus 14 percent opposed (see Exhibit 5 below) (Lieberman, 2006).

Exhibit 5.
Acceptance of Offshore Wind Facilities by Distance to Shore
Source: Lieberman, 2006



- A seven-year study by the Danish Energy Association reported that 40 percent of respondents preferred that future wind facilities be sited offshore where they would be out of sight (Danish Energy Authority, 2006).
- A 2005 study that estimated the visual externalities as a function of the size of wind facilities, number of wind facilities, and their distance from the coast found that visual disamenities can be reduced by extending the distance to the shore. The report found that there is a significant willingness to pay for having wind facilities located at distances where the visual disamenities are fairly small, specifically, up to 18 km from the shore (Ladenburg et al., 2005).

4 RECREATION AND TOURISM USES AND ACTIVITIES

Recreational and tourism uses and activities are identified in this section as general beach and recreational uses, which include boating, fishing and diving, and wildlife viewing.

As with other topic areas previously discussed, minimal literature on the impacts due to offshore wind project construction or decommissioning was available, and thus this section will focus on wind facility operation. When construction/decommissioning impacts are discussed, they are identified as such.

4.1 GENERAL BEACH USE

The majority of studies of the potential impact of offshore wind facilities on general beach use have been conducted in the U.S. These studies are not based on the public's actual experience with a wind facility, but rather on how the public perceives the prospective wind facility. Overall, both the U.S. and European studies indicate that offshore wind facilities would have minimal to no impact on beach use. The study authors have further analyzed the data to determine what factors influence a respondent's perception of offshore wind facilities, such as demographics, socioeconomic, or types of activities the respondents participate in at the beach (such as sunbathing and walking).

The following surveys have been conducted to gauge the expected effects of offshore wind development on beachgoers:

- A 2010 study of 1,000 out-of-state tourists on Delaware beaches found that when questioned on how the development of an offshore wind facility would affect beachgoers' future visits, respondents sampled on the boardwalk were 10 times more likely to continue visiting a beach with offshore wind turbines compared to those sampled on the beach (Lilley et al., 2010). The same study also found that respondents who would continue visiting a beach with an offshore wind facility put more value on vehicle access to the beach than those who would not continue to visit. These results may suggest that beaches with improvements such as boardwalks or ease of vehicle access may be less significantly impacted by changes in use patterns due to offshore wind facilities than unimproved, more pristine beaches.
- A Scottish survey of 400 tourists found that 75 percent of respondents had positive or neutral opinion of a wind facility's impact on a landscape, and that beach walkers had a more positive opinion than sunbathers (Riddington et al, 2008). Other research in Denmark has noted a connection between acceptance of offshore wind and the frequency that a person uses the beach (Ladenburg, 2009).
- In North Carolina, 89 percent of survey respondents would maintain planned beach trips if there were 100 wind turbines one mile offshore; 5 percent would not visit the beach; and 6 percent would take a trip to a different beach. On average, respondents would decrease the number of trips by one per year (14 trips instead of 15). Overall, 50 percent of respondents

believe that offshore wind facilities could have a positive impact on view (Landry et al., 2010).

- Lilley et al. (2010) reported that survey respondents with higher incomes said they would be less likely to visit a beach with an offshore wind facility. Families with older teenagers are 3.5 times more likely to visit the same beach with offshore wind, and younger respondents (under 30) were 9.2 times more likely to visit a Delaware beach with offshore wind (Lilley et al., 2010).

Offshore wind development may also impact existing coastal recreational area uses. One German study found that the installation of offshore wind facilities may decrease wave power with the potential to impact surfing conditions (Michel et al., 2007). This could potentially diminish the beach as a surfing destination and, consequently, impact the local surf-related economies.

Several studies have also indicated that acceptance of the aesthetic change due to the presence of an offshore wind project is related to how an individual uses the beach and coastal resources. Demographic factors related to acceptance of offshore wind include age, education, income, and view of facility during daily routine activities. Factors found not to be significant include home ownership, political leaning, gender, and whether it is possible to see the project from a home (Firestone and Kempton, 2007).

4.2 RECREATIONAL USES

4.2.1 Boating

No literature was found describing impacts to recreational boating from construction, operation, or decommissioning of offshore wind facilities. No impacts to use patterns are expected for boating outside the wind facility. Minimal impact would be expected on smaller water craft that will be able to navigate through the wind facility (see also the discussion on turbine layout in the Fishing section below). However, because vessels under sail do not have the same navigational flexibility as power-driven crafts, a wind facility could interfere with navigation under sail (RYA, 2004).

The Royal Yachting Association (RYA) has published several position papers on offshore wind as part of their consultation on planned projects in the U.K. (RYA, 2009 and 2004). They state that they support development of renewable energy, but that they want to ensure that the safety of recreational boaters is not compromised. The purpose of their input is to inform developers in the planning stages to minimize impacts to pleasure craft. Concerns identified include navigational safety, location (i.e., avoidance of popular cruising and racing areas), and decommissioning. No analyses of impacts to recreational boating are provided in these papers.

4.2.2 Fishing

The concern of recreational fishers is that an offshore wind facility would functionally limit their access to the area occupied by the turbines. In practice, smaller recreational vessels may be able to easily navigate within the wind facility, and the presence of the turbine foundations has the potential to enhance habitat and improve the fishing ground.

The design and layout of the wind facility will determine the level of effects on recreational navigation and fishing within the wind facility.

- The Cape Wind turbines would be spaced 629 by 1,000 meters (m) apart, which would allow maneuvering of recreational vessels and allow access for recreational fishing (MMS, 2009). The Cape Wind FEIS also asserts that the presence of the monopile foundations may act as artificial reefs and draw certain species, enhancing recreational fishing. Similar results have been documented for Gulf of Mexico oil rig platforms, and anglers reportedly prefer to fish near oil and gas structures (Hiatt and Milon, 2002).
- A 2006 survey of recreational and commercial fishers in the U.K. showed that although commercial fishers were very concerned about safety and inability to maneuver within the wind facilities, recreational fishers saw wind facilities as potentially generating better fishing conditions (Mackinson et al., 2006). The predicted minimal impact on offshore fishing and potential for new recreational fishing opportunities may prove beneficial or offset other impacts of offshore wind development on this sector of the recreational and tourism economy.

Another concern among marine vessel owners, and particularly charter fishing vessels, is the issue of insurance companies possibly identifying increased navigational risk and increasing vessel insurance premiums. For private recreational vessels it is highly unlikely that insurance companies would raise premiums, but this has not been explicitly discussed in the literature. Currently, insurance providers do not impose restrictions or higher premiums due to proximity of offshore wind facilities (Rhode Island CRMC, 2010). Experiences in Europe suggest that fishing vessel insurance companies may require restricted access to wind energy areas as conditions of policies (RWE Innogy, 2011). No information was found regarding the potential for increases in insurance premiums specific to commercial recreational vessels.

4.2.3 Diving and Wildlife Viewing

Minimal literature was found on the effects of an offshore wind facility on wildlife viewing, either below or above the water. During the construction phase, it is possible that wildlife will avoid the area due to activity and noise. During the operational phase, it is widely thought that the foundations will act as artificial reefs and produce enhanced habitat, especially for hard-ground communities and fish. Both diving and recreational fishing would likely benefit from this type of development (Farrugia et al., 2010; Danish Energy Authority, 2006; MMS, 2009; Maes et al., 2005).

5 WIND FACILITY-BASED TOURISM

The potential for wind facility-based tourism to contribute to the tourism economy is included in some socioeconomic analyses (Kuehn, 2005; Mackinson et al., 2006). However, extensive research on this topic has yet to be conducted.

- The Scroby Sands offshore wind facility in the U.K. operates a tourist information center and runs tours out to the wind facility. Following construction of the offshore wind project, Scroby Sands Information Centre had 30,000 visitors in the first six months, and 35,000 visitors the following year (Riddington et al, 2008). It could be anticipated that similar beneficial impacts to the tourism economy would result from operating wind facilities in the U.S.
- In a French study, Westerberg et al. (2010) suggests that potential visual effects may be compensated for by associating the wind facilities with recreational activities such as boat tours through the wind facility and diving at turbine foundations that serve as artificial reefs.
- A German study of 3,500 beach visitors found that 35 percent of those questioned said that they would be interested in seeing an information center on the offshore wind facility (NIT, 2000).
- In a Scottish study, 80 percent of the respondents would be interested in visiting a terrestrial wind facility visitor center (MORI Scotland, 2002).
- A study of Delaware beachgoers found that 45 percent of respondents would likely take a tour boat to see an offshore wind facility (Lilly et al., 2010).
- A ferry company in Massachusetts, Hy-Line, is planning to run tourist trips to the Cape Wind project during construction and operation with the expectation that it will be a popular tourist destination (Cape Cod Times, 2011).

6 TOURISM-RELATED PROPERTY VALUES

Along with the concern that aesthetics will impact recreational uses of coastal resources, there is also concern that the presence of an offshore wind facility will negatively impact property values within the viewshed of the project.

At the operating wind facility at Horns Rev, Denmark, tourist volume was reported constant relative to pre-wind facility levels, and vacation property prices moved with national averages one year into operation of the wind facility (Kuehn, 2005). However, this was a qualitative study, and little other information is available regarding changes in property values associated with the presence of operating wind facilities in Europe. Several studies have been conducted in the U.S., but they are based on perception rather than empirical evidence from an operating wind facility. Given the small sample sizes and the lack of empirical grounding, these estimates of valuation loss are not reliable.

A 2003 economic study (Haughton et al., 2003) of the Cape Wind project surveyed approximately 1,000 people and quantified loss of property values and tourist spending based on respondents' answers. Poll responses were taken after respondents were shown several visual simulations of the Cape Wind project. To estimate the loss of property value due to the offshore wind facility, the authors asked homeowners to estimate the change in the value of their property. This estimate was then applied to all property in the municipality to calculate an anticipated total loss in property value. Given that this estimate is not based on any empirical data, a quantitative assessment of loss of value due to the wind facility is not possible. However, based on surveyed opinions, the authors anticipated a 4 percent reduction in value for inland homes and 11 percent for waterfront property (Haughton et al., 2003). The same Haughton et al. (2003) study polled 45 Cape Cod realtors with the following results:

- Twenty-two (or 49 percent) of the realtors believed that an offshore wind project would negatively impact property values; and
- Seventeen (or 38 percent) believed that an offshore wind project would have no impact on property values or were unsure of the impact.

Several U.S. studies have explored public opinion on the effects on property values:

- A study of 955 respondents conducted in Delaware by Firestone et al. (2008a) found that 85 percent of opponents and 10 percent of supporters believed that an offshore wind project would negatively impact property values.
- A study on Cape Cod, of 504 respondents, found that 48 percent expected a negative impact on property values (Firestone and Kempton, 2007).
- A 2009 study of 7,000 single-family homes within proximity to 24 terrestrial wind facilities in the U.S. found no statistically significant effect of proximity or view of wind facilities on residential property values (Hoen et al., 2010). Because there are no existing offshore wind facilities in the U.S., it is hard to tell if this terrestrial project is representative of the impact of offshore wind development on property values; however, this study provides a much

larger sample and more complete empirical data on operating wind facilities than the previous studies based on no experience with wind farms.

Other U.S. studies have found that residents do not expect impacts to property values as a result of offshore wind development. A study of approximately 1,000 respondents assessed the potential impact of offshore wind on property rentals in New Jersey (Schulman and Rivera, 2009):

- 76 percent of the respondents indicated that a wind facility would not impact rental properties.
- 13 percent thought it would be harder to rent properties.
- 10 percent believed it will be easier to rent properties with an offshore wind facility in the vicinity.

As discussed above, calculation of loss of property value in the absence of operating offshore wind facilities in the U.S. to measure market response is not reliable. Thus, these studies are more appropriately viewed as opinion surveys.

7 CONCLUSION

Very little information was found directly or even indirectly pertaining to impacts on recreational and tourism economies. A summary paper prepared by the British Wind Energy Association (BWEA, 2006) entitled *The Impact of Wind Farms on the Tourist Industry in the UK* also notes that it is not feasible to draw any strong conclusions on the effects of wind facilities on tourism because causality cannot be established for an industry with such a multitude of influences. The BWEA paper is mostly focused on terrestrial wind, but also includes some offshore wind projects.

Available studies based on onshore wind facilities have been included in this synthesis report. However, these have limited applicability because of the different aesthetic experience associated with coastal and inland tourism and recreation. Placement of an offshore wind facility will always overlap with the concentrated recreational and tourism coastal economies along the U.S. eastern seaboard, but an onshore wind facility can be located to avoid tourist and recreational areas.

Studies of impacts from offshore oil and gas facilities are also not appropriate for comparison. Such facilities have a much smaller footprint, and they are also strongly associated with the potential for environmental pollution.

From the review of currently available studies discussed in this synthesis report, the following conclusions can be drawn:

- Very few studies are available of the impacts on tourism and recreation from operating offshore wind facilities in Europe. The available studies indicate little to no effects on the tourism and recreational economies.
- All U.S. studies on impacts of offshore wind facilities have been based on perception, with the majority of these studies indicating acceptance or slight disapproval of these facilities. Given that a European study showed that opinions became more positive when the offshore wind facility was operational, the U.S. studies could possibly be negatively biased.
- Studies clearly indicate that impact of an offshore wind facility on the aesthetics of coastal areas is the primary factor that could potentially affect recreational and tourism use. Residents, tourists, and recreational users are more accepting of wind facilities sited farther from shore.
- Little to no negative impact on recreational marine boating or fishing was found. In fact, a positive effect on recreational diving and fishing may result from the foundations acting as artificial reefs and attracting fish.
- There is potential for offshore wind facilities to provide a new wind facility-based tourism industry. Experience in Europe indicates that tourists are interested in visiting these facilities.

To estimate the impacts of offshore wind facilities on the tourism and recreational economies, studies should be conducted to measure the actual effects in the tourist areas adjacent to the operating wind facilities. Studies in the U.S. provide public opinion based on no experience with actual operating offshore wind facilities and cannot be relied on to estimate economic impacts. Neither can such be relied on to estimate any changes in the public's activity and use patterns or resulting economic impacts when they actually experience an offshore wind facility.

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Appendix B

Summary of Scorecard Criteria, Metrics, Weights, and Scoring for Selection of Counties for BOEM Socioeconomic Analysis

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
1	Ocean recreation/tourism accounts for a large percentage of the location's <u>tourism</u> economy (Impact on Recreation)	(a) Percent of tourism employment associated with Scenic and Sightseeing Transportation, Water NAICS Code (487210) <i>(Areas with a large percentage of their tourism employment tied to ocean tourism services may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile
		(b) Percent of tourism employment associated with Marinas NAICS Code (713930) <i>(Areas with a large percentage of their tourism employment tied to ocean tourism infrastructure may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile
		(c) Percent of tourism employment associated with Renting Pleasure Boats NAICS Code (532292) <i>(Areas with a large percentage of their tourism employment tied to ocean tourism activities may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
2	Ocean recreation/tourism accounts for a large percentage of the location's <u>marine</u> economy (Impact on Recreation)	(a) Percent of marine employment associated with Scenic and Sightseeing Transportation, Water NAICS Code (487210) <i>(Areas with a large percentage of their marine employment tied to ocean tourism services may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile
		(b) Percent of marine employment associated with Marinas NAICS Code (713930) <i>(Areas with a large percentage of their marine employment tied to ocean tourism infrastructure may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile
		(c) Percent of marine employment associated with Renting Pleasure Boats NAICS Code (532292) <i>(Areas with a large percentage of their marine employment tied to ocean tourism activities may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance, low data granularity.)</i>	10 to 1, based on industry ranking by decile

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
3	Tourism accounts for a large percentage of the location's economy (Impact on Recreation)	(a) Percent of employment associated with tourism economy <i>(Counties in which the tourism sector comprises a large percentage of the total economy may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance.)</i>	10 to 1, based on industry ranking by decile
		(b) Percent of employment associated with Hotels NAICS Code (7211) <i>(Counties in which the tourism sector comprises a large percentage of the total economy may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; high data confidence; medium data relevance.)</i>	10 to 1, based on industry ranking by decile
		(c) Visitation <i>(Counties with high levels of visitation may be particularly sensitive to offshore wind development.)</i>	Medium <i>(Relates directly to potential economic impacts of offshore wind facilities; low data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(d) Percentage of ocean recreation/tourism firms that are small <i>(Small businesses are particular vulnerable to economic shifts; thus, areas with significant small business concentrations are more sensitive to economic shifts.)</i>	Low <i>(May be related to vulnerability of tourism establishments; high data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
4	Location has a large number of establishments related to coastal/water recreation (Impact on Recreation)	(a) Percent of surf and diving-related retail establishments as a percentage of total establishments <i>(Areas with a large percentage of establishments tied to ocean tourism activities may be particularly sensitive to offshore wind development.)</i>	Low <i>(Relates directly to potential economic impacts of offshore wind facilities; medium data granularity; low data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(b) Number of yacht or sailing clubs as a percentage of total establishments <i>(Areas with a large percentage of establishments tied to ocean tourism activities may be particularly sensitive to offshore wind development.)</i>	Low <i>(Relates directly to potential economic impacts of offshore wind facilities; medium data granularity; low data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(c) Number of annual angler days (2010) <i>(Areas with a significant number of recreational anglers may be particularly sensitive to offshore wind development.)</i>	Low <i>(Relates directly to potential economic impacts of offshore wind facilities; low data granularity; medium data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
5	Location has a high percentage of natural and/or historic/cultural coastal areas (Visual Impacts)	(a) Percent of location's coastal area that is a designated national/state park/preserve <i>(Use patterns in coastal areas that are preserved natural areas or historic areas may be more sensitive to offshore wind development than use patterns in developed coastal areas.)</i>	High <i>(Relates to area's character that may indicate sensitivity to viewshed disruptions; high data confidence; high data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(b) Number of designated historic / cultural points of interest <i>(Use patterns in coastal areas that are preserved natural areas or historic areas may be more sensitive to offshore wind development than use patterns in developed coastal areas.)</i>	High <i>(Relates to area's character that may indicate sensitivity viewshed disruptions; high data confidence; high data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(c) Presence of tribal area <i>(Tribal areas may be particularly sensitive to offshore wind development because of their cultural significance.)</i>	Medium <i>(Relates to area's character that may indicate sensitivity to viewshed disruptions; high data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
		<p>(d) National/state park/preserve visitation</p> <p><i>(Use patterns in coastal areas that are preserved natural areas or historic areas may be more sensitive to offshore wind development than use patterns in developed coastal areas.)</i></p>	<p>High</p> <p><i>(Relates to area's character that may indicate sensitivity to viewshed disruptions; high data confidence; high data relevance.)</i></p>	<p>Scale TBD, with data sorted into 10 bins</p>
		<p>(e) Historic / cultural area visitation</p> <p><i>(Use patterns in coastal areas that are preserved natural areas or historic areas may be more sensitive to offshore wind development than use patterns in developed coastal areas.)</i></p>	<p>High</p> <p><i>(Relates to area's character that may indicate sensitivity to viewshed disruptions; high data confidence; high data relevance.)</i></p>	<p>Scale TBD, with data sorted into 10 bins</p>
		<p>(f) Percent of county/location perimeter that is coastline</p> <p><i>(Reflects significance of coastal access and views.)</i></p>	<p>Low</p> <p><i>(Relates to area's character; medium data confidence; low data relevance.)</i></p>	<p>Scale TBD, with data sorted into 10 bins</p>

Ref #	Criteria	Metric (Justification)	Weighting (Justification)	Scoring
6	Location has significant development along the coast (Visual Impacts/Property Values)	(a) Residential density within 1/2 mile of coast. <i>(Areas with significant residential development along the coast may be particularly sensitive to property value changes as a result of offshore wind development and associated impacts on viewsheds.)</i>	Low <i>(Relates to area's character, may identify locations with the most potential for impacted viewsheds for residents; high data confidence; low data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(b) Percent of residential properties that could be second homes or investment properties <i>(Residents of second homes are more likely to use their home for recreation; thus, areas with a high percentage of second homes may be particularly sensitive to property value changes as a result of offshore wind development and associated impacts on viewsheds.)</i>	Medium <i>(Relates to area's character; may identify locations with the most potential for impacted viewsheds for residents; high data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins
		(c) Establishment density within 1/2 mile of coast <i>(Areas with significant commercial activity along the coast may be particularly sensitive to impacts on viewsheds and changes to property values as a result of offshore wind development.)</i>	Medium <i>(Relates to area's character; may identify locations with the most potential for impacted viewsheds for residents; high data confidence; medium data relevance.)</i>	Scale TBD, with data sorted into 10 bins

Appendix C

List of Geographies for Potential Analysis

State	Location	Notes
Maine	Washington	Proposed for deepwater wind
	Hancock	Acadia National Park
	Waldo	
	Knox	Acadia National Park
	Lincoln	Proposed for deepwater wind
	Sagadahoc	
	Cumberland	
	Penobscot	Non-coastal, but could be affected by tourism activity
	Kennebec	Non-coastal, but could be affected by tourism activity
	York	Proposed for deepwater wind
Massachusetts	Barnstable	MA/RI Wind Energy Area (WEA) Cape Wind project lease Cape Cod National Seashore
	Dukes	MA/RI Wind Energy Area (WEA) Cape Wind project lease
	Nantucket	MA/RI Wind Energy Area (WEA) Cape Wind project lease
	Bristol	MA/RI Wind Energy Area (WEA)
	Plymouth	Cape Wind project lease – area not visible but traffic may be affected
	Norfolk	
	Suffolk	
	Essex	
Rhode Island	Providence	
	Bristol	
	Kent	
	Newport	MA/RI Wind Energy Area (WEA)
	Washington	MA/RI Wind Energy Area (WEA)
	<i>Block Island</i>	<i>Hotspot in Washington County</i> MA/RI Wind Energy Area (WEA)
Connecticut	New London	
	Middlesex	
	New Haven	
	Fairfield	

State	Location	Notes
New York	Suffolk	Area offshore being considered for leasing may be visible Fire Island National Seashore
	Nassau	
	Queens	
	Kings	
	Richmond	
	Westchester	
	New York	
	Bronx	
New Jersey	Cape May	Wind Energy Area (WEA) off coast
	Cumberland	
	Salem	
	Atlantic	Wind Energy Area (WEA) off coast
	Ocean	Wind Energy Area (WEA) off coast
	Monmouth	
	Middlesex	
	Union	
	Essex	
	Hudson	Proposal for deep offshore wind
Delaware	Sussex	Wind Energy Area (WEA) off coast Delaware Seashore State Park
	<i>Rehoboth Beach</i>	<i>Wind Energy Area (WEA) off coast Hotspot in Sussex County</i>
	Kent	
	New Castle	
Maryland	Worcester	Wind Energy Area (WEA) off coast Assateague Island National Seashore
	<i>Ocean City</i>	<i>Wind Energy Area (WEA) off coast Hotspot in Worcester County</i>
	Somerset	
	Wicomico	
	St. Mary's	
	Dorchester	
	Calvert	
	Talbot	
	Charles	
	Queen Anne's	
	Anne Arundel	

State	Location	Notes
Virginia	Accomack	Wind Energy Area (WEA) off coast
	Northampton	Wind Energy Area (WEA) off coast
	Virginia Beach	Wind Energy Area (WEA) off coast Back Bay National Wildlife Refuge
	Poquoson	
	Chesapeake	
	Suffolk	
	Isle of Wright	
	Norfolk	
	Portsmouth	
	Hampton	
	Newport News	
	Gloucester	
	Mathews	
	York	
	James City	
	Middlesex	
	Lancaster	
	Northumberland	
	Westmoreland	
	Essex	
Surry		
North Carolina	Currituck	Area offshore being considered for leasing
	Dare	Area offshore being considered for leasing Cape Hatteras National Seashore
	Hyde	
	Beaufort	
	Pamlico	
	Craven	
	Carteret	Area offshore being considered for leasing Cape Lookout National Seashore
	Onslow	Area offshore being considered for leasing
	Pender	
	New Hanover	Area offshore being considered for leasing
	Brunswick	Area offshore being considered for leasing
	Tyrell	
	Washington	
	Bertie	
	Chowan	
	Perquimans	
	Pesquotank	
Camden		

State	Location	Notes
South Carolina	Horry	Area offshore being considered for leasing (NC area may be visible)
	<i>Myrtle Beach</i>	<i>Hotspot in Horry County</i>
	Georgetown	Proposed pilot wind project in State waters
	Charleston	Francis Marion National forest
	Colleton	
	Beaufort	
	Jasper	
Georgia	Chatham	
	Bryan	
	Liberty	
	McIntosh	
	Glynn	
	Camden	

Appendix D

Geodatabase Tables and Data Structures

General County Profiles

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
County_Code*	Text(255)	Federal Information Processing Standard – County and State identification
State	Text(255)	
County	Text(255)	
Year_Round_Population_2010	Double	
Year_Round_Population_2000	Double	
Pct_Population_Change_2000_2010	Double	
Median_Age_Years	Double	
Pct_Female	Double	
Pct_Foreign_Born	Double	
Eth_White	Double	
Eth_Black_AfricanAmerican	Double	
Eth_Asian	Double	
Eth_HispanicLatino	Double	
Eth_AmericanIndian	Double	
Unemploy_Rate	Double	
Pct_Out_of_Labor_Force	Double	
Median_Household_Income	Double	
Pct_Pop_Below_Poverty_Line	Double	
edu_High_School_Diploma	Double	
Edu_Bachelor_Degree	Double	
Edu_Graduate_Prof_Degree	Double	
Population_Density	Double	
Housing_Density	Double	

Field	Data Type	Comments
Pct_Housing_Structures_Independent_Units	Double	
Pct_Occupied_Units	Double	
Pct_Seas_Rec_or_Occ_Use	Double	
Dollars_Median_House_Value	Double	
Business_Establishments	Double	
Pct_Small_Businesses	Double	
Pct_OceanRelated_Jobs_Related_Tourism	Double	

*- Indicates key field

General State Profiles

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
State	Text(255)	
State_abb	Text(255)	State abbreviation
GenPop_Year_Round_Population_2010	Double	
GenPop_YearRound_Population_2000	Double	
GenPop_Population_Change_pct__2000_2010	Double	
GenPop_Median_Age_Years	Double	
GenPop_Pct_Female	Double	
GenPop_Pct_Foreign_Born	Double	
Ethnicity_White	Double	
Ethnicity_Black_AfricanAmerican	Double	
Ethnicity_Asian	Double	
Ethnicity_HispanicLatino	Double	
Ethnicity_AmericanIndian	Double	
Econ_Unemploy_Rate	Double	
Econ_pct_Out_of_Labor_Force	Double	

Field	Data Type	Comments
Econ_Median_Household_Income	Double	
Econ_pct_of_Pop_Below_Poverty_Line	Double	
Edu_HighSchoolDiploma	Double	
Edu_Bachelor_Degree	Double	
Edu_Graduate_ProfDegree	Double	
Housing_Population_Density	Double	
Housing_Density	Double	
Pct_Housing_Structures_IndependentUnits	Double	
Pct_OccupiedUnits	Double	
Pct_Seasonal_Rec_or_Occ_Use	Double	
Dollars_Median_House_Value	Double	
Business_Establishments	Double	
Pct_Small_Businesses	Double	

*- Indicates key field

Spatial Data

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System
State	Text(255)	
Location_Name	Text(255)	
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
pct_coastal_area_designated_national_statepark_preserve	Double	
pct_county_perimeter_coastline	Double	

Field	Data Type	Comments
Residential_density_within_half_mile_coast_sqmi	Double	
Second_homes_or_investment_properties_pct_totalresidentialproper	Double	
Establishment_density_within_halfmile_coast	Double	

*- Indicates key field

Info USA Inputs

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System
State	Text(255)	
Location_Name	Text(255)	
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
Total_Num_establishments	Double	
Num_surf_divingrelated_establishments	Double	
Num_yacht_sailing_clubs	Double	
Num_fishingrelated_establishments	Double	
Num_watersportsrelated_establismments	Double	
TotalNum_oceanrelated_establishments	Double	
Angler_days_fishing	Double	

*- Indicates key field

Other Inputs

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System

Field	Data Type	Comments
State	Text(255)	
Location_Name	Text(255)	
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
Visitation	Double	
Summer_Employment	Double	
Winter_Employment	Double	
Population	Double	
Num_designated_historic_cultural_POI	Double	
Presence_tribalarea	Double	
National_state_park_preserve_visitation	Double	
Historic_cultural_area_visitation	Double	
Num_stateparks	Double	
Num_Alternative_stateparks	Double	
Num_national_parks	Double	
Num_wildlife_refuges	Double	
TotalNum_national_stateparks_wildlife_refuges	Double	

*- Indicates key field

NAICS Input Employment

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System
State	Text(255)	
Location_Name	Text(255)	

Field	Data Type	Comments
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
Employment__All_industries_NAICS	Double	
Employment_Tourism_NAICS_71	Double	
Employment_Tourism_NAICS_721	Double	
Employment_Tourism_NAICS_5615	Double	
Employment_Tourism_NAICS_487	Double	
Employment_Tourism_NAICS_532292	Double	
Employment_Marine_NAICS_483	Double	
Employment_Marine_NAICS_4872	Double	
Employment_Marine_NAICS_4883	Double	
Employment_Marine_NAICS_42446	Double	
Employment_Marine_NAICS_3366	Double	
Employment_Marine_NAICS_1141	Double	
Employment_Marine_NAICS_1125	Double	
Employment_Marine_NAICS_71393	Double	
Employment_Marine_NAICS_441222	Double	
Employment_Marine_NAICS_532292	Double	
Employment_Metrics_1_and_2_487210	Double	
Employment_Metrics_1_and_2_713930	Double	
Employment_Metrics_1_and_2_532292	Double	
Employment_Metric_3b_7211	Double	
Total_Tourism	Double	
Total_Marine	Double	

Field	Data Type	Comments
Total_Tourism_Marine	Double	
Total_Metrics_1and2	Double	

* - Indicates key field

NAICS Input Establishments

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System
State	Text(255)	
Location_Name	Text(255)	
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
Establishments_All_industries_NAICS	Double	
Establishments_Tourism_NAICS_71	Double	
Establishments_Tourism_NAICS_721	Double	
Establishments_Tourism_NAICS_5615	Double	
Establishments_Tourism_NAICS_487	Double	
Establishments_Tourism_NAICS_532292	Double	
Establishments_Small_Tourism_NAICS_71	Double	
Establishments_Small_Tourism_NAICS_721	Double	
Establishments_Small_Tourism_NAICS_5615	Double	
Establishments_Small_Tourism_NAICS_487	Double	
Establishments_Small_Tourism_NAICS_532292	Double	
Establishments_Marine_NAICS_483	Double	
Establishments_Marine_NAICS_4872	Double	
Establishments_Marine_NAICS_4883	Double	

Field	Data Type	Comments
Establishments_Marine_NAICS_42446	Double	
Establishments_Marine_NAICS_3366	Double	
Establishments_Marine_NAICS_1141	Double	
Establishments_Marine_NAICS_1125	Double	
Establishments_Marine_NAICS_71393	Double	
Establishments_Marine_NAICS_441222	Double	
Establishments_Marine_NAICS_441222	Double	
Establishments_Marine_NAICS_532292	Double	
Establishments_Small_Marine_NAICS_483	Double	
Establishments_Small_Marine_NAICS_4872	Double	
Establishments_Small_Marine_NAICS_4883	Double	
Establishments_Small_Marine_NAICS_42446	Double	
Establishments_Small_Marine_NAICS_3366	Double	
Establishments_Small_Marine_NAICS_1141	Double	
Establishments_Small_Marine_NAICS_1125	Double	
Establishments_Small_Marine_NAICS_71393	Double	
Establishments_Small_Marine_NAICS_441222	Double	
Establishments_Small_Marine_NAICS_532292	Double	
Establishments_Metrics_1_and_2_487210	Double	
Establishments_Metrics_1_and_2_713930	Double	
Establishments_Metrics_1_and_2_532292	Double	
Establishments_Metric3b_7211	Double	
Total_Tourism	Double	
Total_Tourism_Small	Double	
Total_Marine	Double	

Field	Data Type	Comments
Total_Marine_Small	Double	
Total_Tourims_and_Marine	Double	
Total_Tourism_and_Marine_Small	Double	
Total_Metrics_1and2	Double	

*- Indicates key field

Employment 2010

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
County_Code*	Text(255)	Federal Information Processing Standard – County and State identification
State	Text(255)	
County	Text(255)	
SummerEmployment_July_Marine_487210	Double	
SummerEmployment_July_Marine_713930	Double	
SummerEmployment_July_Marine_336612	Double	
SummerEmployment_July_Marine_441222	Double	
SummerEmployment_July_LandBased_532292	Double	
SummerEmployment_July_LandBased_72111	Double	
SummerEmployment_July_LandBased_7221	Double	
SummerEmployment_July_LandBased_7222	Double	
SummerEmployment_July_LandBased_713	Double	
SummerEmployment_July_GenTourism_561510	Double	
SummerEmployment_July_GenTourism_561520	Double	
SummerEmployment_July_GenTourism_487110	Double	
WinterEmployment_Jan_Marine_487210	Double	

Field	Data Type	Comments
WinterEmployment_Jan_Marine_713930	Double	
WinterEmployment_Jan_Marine_336612	Double	
WinterEmployment_Jan_Marine_441222	Double	
WinterEmployment_Jan_Landbased_532292	Double	
WinterEmployment_Jan_Landbased_72111	Double	
WinterEmployment_Jan_Landbased_7221	Double	
WinterEmployment_Jan_Landbased_7222	Double	
WinterEmployment_Jan_Landbased_713	Double	
WinterEmployment_Jan_GenTourism_561510	Double	
WinterEmployment_Jan_GenTourism_561520	Double	
WinterEmployment_Jan_GenTourism_487110	Double	
AvgEmployment_Marine_487210	Double	
AvgEmployment_Marine_713930	Double	
AvgEmployment_Marine_336612	Double	
AvgEmployment_Marine_441222	Double	
AvgEmployment_LandBased_532292	Double	
AvgEmployment_LandBased_72111	Double	
AvgEmployment_LandBased_7221	Double	
AvgEmployment_LandBased_7222	Double	
AvgEmployment_LandBased_713	Double	
AvgEmployment_GenTourism_561510	Double	
AvgEmployment_GenTourism_561520	Double	
AvgEmployment_GenTourism_487110	Double	

* - Indicates key field

Employment 2005

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
County_Code*	Text(255)	Federal Information Processing Standard – County and State identification
State	Text(255)	
County	Text(255)	
SummerEmployment_July_Marine_487210	Double	
SummerEmployment_July_Marine_713930	Double	
SummerEmployment_July_Marine_336612	Double	
SummerEmployment_July_Marine_441222	Double	
SummerEmployment_July_LandBased_532292	Double	
SummerEmployment_July_LandBased_72111	Double	
SummerEmployment_July_LandBased_7221	Double	
SummerEmployment_July_LandBased_7222	Double	
SummerEmployment_July_LandBased_713	Double	
SummerEmployment_July_GenTourism_561510	Double	
SummerEmployment_July_GenTourism_561520	Double	
SummerEmployment_July_GenTourism_487110	Double	
WinterEmployment_Jan_Marine_487210	Double	
WinterEmployment_Jan_Marine_713930	Double	
WinterEmployment_Jan_Marine_336612	Double	
WinterEmployment_Jan_Marine_441222	Double	
WinterEmployment_Jan_Landbased_532292	Double	
WinterEmployment_Jan_Landbased_72111	Double	
WinterEmployment_Jan_Landbased_7221	Double	
WinterEmployment_Jan_Landbased_7222	Double	

Field	Data Type	Comments
WinterEmployment_Jan_Landbased_713	Double	
WinterEmployment_Jan_GenTourism_561510	Double	
WinterEmployment_Jan_GenTourism_561520	Double	
WinterEmployment_Jan_GenTourism_487110	Double	
AvgEmployment_Marine_487210	Double	
AvgEmployment_Marine_713930	Double	
AvgEmployment_Marine_336612	Double	
AvgEmployment_Marine_441222	Double	
AvgEmployment_LandBased_532292	Double	
AvgEmployment_LandBased_72111	Double	
AvgEmployment_LandBased_7221	Double	
AvgEmployment_LandBased_7222	Double	
AvgEmployment_LandBased_713	Double	
AvgEmployment_GenTourism_561510	Double	
AvgEmployment_GenTourism_561520	Double	
AvgEmployment_GenTourism_487110	Double	

*- Indicates key field

Calculated Scorecard Metrics

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
ID	Double	ESRI System
State	Text(255)	
Location_Name	Text(255)	

Field	Data Type	Comments
Location_Code*	Text(255)	Federal Information Processing Standard – County and State identification
A_1a_Pct_tourism_employment_associated_Scenic_Sightseeing_Tra nsp	Double	
A_1b_pct_tourism_employment_associated_Marinas_NAICS_Code _71393	Double	
A_1c_pct_tourism_employment_associated_RentingPleasureBoats_ NAIC	Double	
A_1d_Pct_tourism_employment_associated_Codes_487210_713930 _53229	Double	
A_2a_pct_marine_employment_associated_Scenic_Sightseeing_Tra nspo	Double	
A_2b_pct_marine_employment_associated_with_Marinas_NAICS_71 3930	Double	
A_2c_pct_marine_employment_associated_RentingPleasureBoats_N AICS	Double	
A_2d_pct_marine_employment_associated_Codes_487210_713930 _532292	Double	
A_3a_pct_employment_associated_tourism_economy	Double	
A_3b_pct_employment_associated_Hotels_NAICS_7211	Double	
Visitation	Double	
A_3c_pct_increase_summer_employment_over_winter_employment	Double	
A_3d_pct_ocean_recreation_tourism_establishments_small	Double	
A_4a_pct_totalestablishments_surf_divingrelated	Double	
A_4b_pct_totalestablishments_yacht_sailingclubs	Double	
A_4c_pct_total_establishments_oceanrelated	Double	
A_4d_Angler_days_of_fishing	Double	

Field	Data Type	Comments
A_5a_pct_coastal_area_national_state_park_preserve	Double	
A_5b_num_designated_historic_cultural_POI	Double	
A_5c_Presence_tribalarea	Double	
National_statepark_preserve_visitation	Double	
Historic_cultural_area_visitation	Double	
A_5d_pct_countyperimeter_coastline	Double	
A_5e_num_national_state_parks_wildliferefuges	Double	
A_6a_Residential_density_halfmile_coast_sqmi	Double	
A_6b_pct_totalresidentialproperties_secondhomes_investmentproper	Double	
A_6c_Establishmentdensity_halfmile_coast	Double	

*- Indicates key field

Miscellaneous Data

Field	Data Type	Comments
OBJECTID	Object ID	ESRI System
County_Code*	Text(255)	Federal Information Processing Standard – County and State identification
State	Text(255)	
County	Text(255)	
Miles_shoreline	Double	
Num_National_Parks_Refuges	Double	
Protected_Land_Refuge_acres	Double	
Num_Public_Beaches	Double	
Num_Harbors	Double	
Num_Marinas_Boatyards	Double	
Num_YachtClubs	Double	

Field	Data Type	Comments
Largest_Employer	Text(255)	
Employees__Largest_Employer_	Text(255)	
Second_Largest_Employer	Text(255)	
Employees__2nd_Largest_Employer_	Text(255)	
Tour_Economy_Expenditures_or_Employment	Text(255)	
_Ocean_Economy_for_Tourism	Double	
LH_Establish	Double	
Average_LH_Employment	Double	
Winter_LH_Employment	Double	
Summer_LH__Employment	Double	
Difference_Winter_to_Summer	Double	
PCT__Increase_Winter_to_Summer	Double	
Average_Weekly_Wage_LH_Employ	Double	
Peak_Summer_Weekly_Wage__L_H_Employ_	Text(255)	
Num_Hotels	Double	
Num_BedandBreakfasts	Double	
Room_Tax_Revenue	Double	
Num_Campgrounds	Double	

*- Indicates key field

Appendix E

Socioeconomic and Coastal Tourism Profiles: Technical Assistance for Users and Community Profiles

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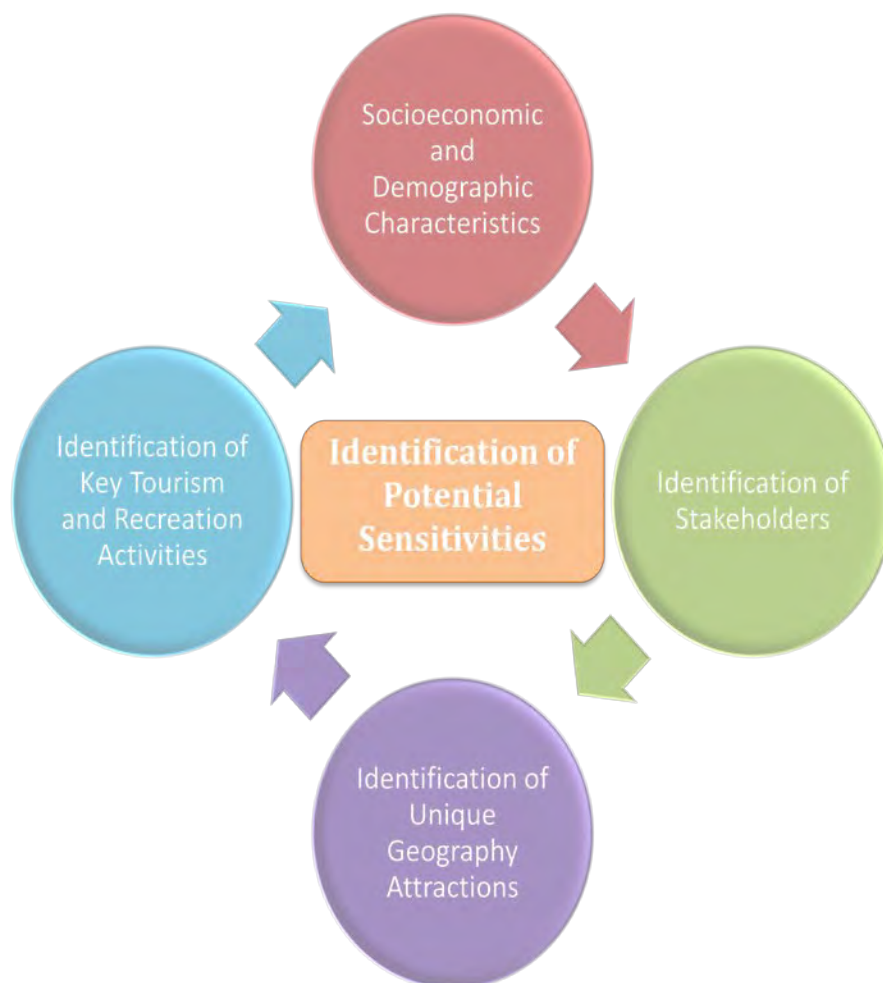
Section I – Technical Assistance for Users	1
1 Introduction.....	1
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3 Identification of Stakeholders	7
4 Identification of Unique Geography Attractions.....	9
5 Identification of Key Tourism and Recreation Activities.....	11
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Section I – Technical Assistance for Users

1 Introduction

This document provides technical assistance and structure for the information in the community profiles in Section II. The information from these profiles is used to further the discussion of siting and developing offshore wind facilities. The document outlines steps a decision maker should take when deciding where to site offshore wind facilities. The list of geographies analyzed includes coastal counties along the eastern seacoast as well as “hotspots” within these counties. The intent of the document is to help decision makers identify and assess potential sensitivities of a geography’s tourism and recreation economy in relation to offshore wind facility development.

The following flow chart depicts a standard approach for identifying impacts to the tourism and recreation sectors in relation to offshore wind development, using the information presented in the community profiles. The approach includes a discussion of characteristics related to the geography’s economics and demographics, stakeholders, unique attractions, and recreation and tourism opportunities, as outlined in the following exhibit.



The individual profiles include both qualitative and quantitative data. Quantitative data provide specific measurements about a geography as it relates to multiple characteristics. Distribution charts in each section provide context of how the quantitative characteristics of each geography compare to other geographies in the study area. Qualitative data provide descriptive information, such as local festivals and tourism events; this information cannot necessarily be compared, but it helps develop the overall picture of a geography's tourism.

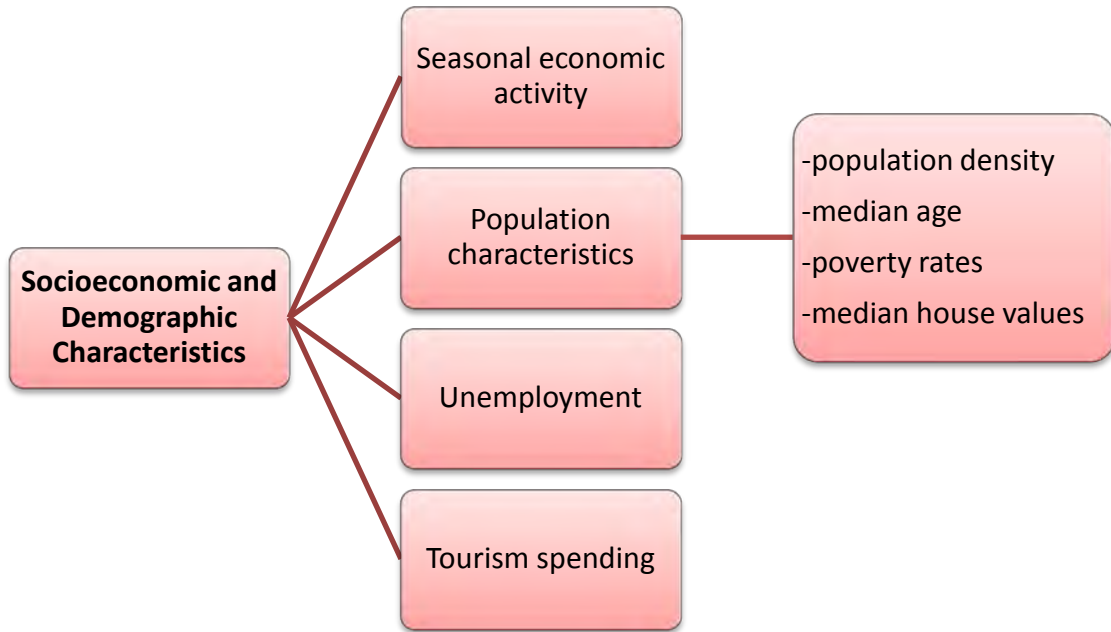
The following sections provide more detailed information on each of the characteristic categories: Socioeconomic and Demographic Characteristics; Identification of Stakeholders; Identification of Unique Geography Attractions; and Identification of Key Tourism and Recreation Activities.

Not all metrics were developed into distributions due to factors such as inconsistent data across geographies, primarily qualitative metrics or in comparable data. The metrics listed below had no distributions developed.

- Bed & Breakfasts
- Business Establishments
- Campgrounds
- Educational Degree
- Ethnicity
- Foreign Born
- Harbors
- Housing Density
- Housing Units that are Independent
- Marinas/Boatyards
- Median Age
- Occupied Housing Units
- Population Out of Labor Force
- Protected Land
- Public Beaches
- Room Tax Revenue
- Sex
- Yacht Clubs

2 Socioeconomic and Demographic Characteristics

The profiles provide information on the socioeconomic and demographic information for each geography. Examples of such information are presented in the following exhibit.



The characteristics listed in the above exhibit are some of the socioeconomic and demographic measures included in the profiles. Socioeconomic conditions of a geography’s population might influence perception of offshore wind development. For example, the population in a geography with high median house values may be concerned about potential impacts on property values, whereas geographies with high unemployment rates may be more concerned with potential impacts on job creation.

To provide a contextual background for each individual profile, the following exhibits display the distribution of quantitative socioeconomic and demographic characteristics across the entire study area:

Exhibit 1. Distribution of Population Change from 2000 to 2010 (%)

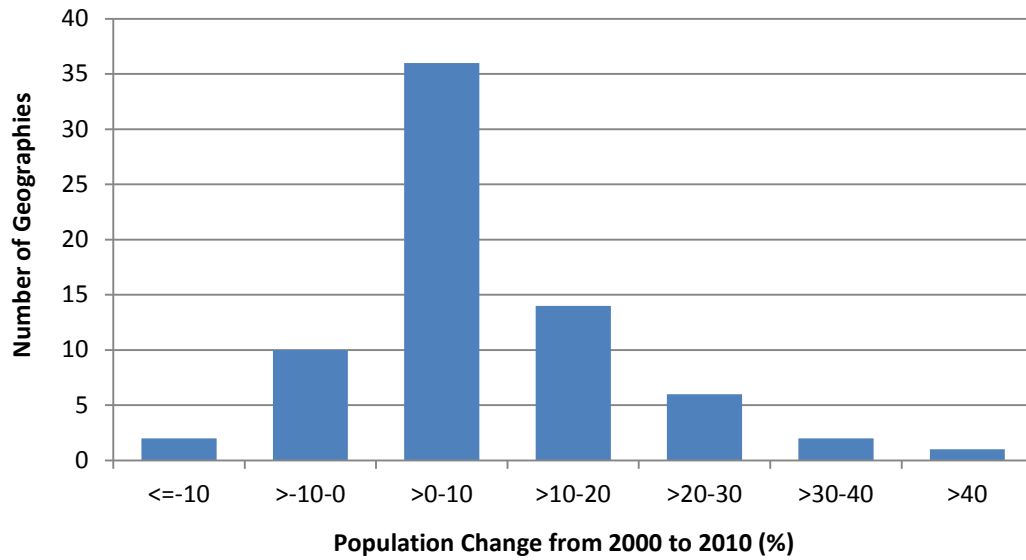


Exhibit 2. Distribution of Median Household Income (Thousand \$)

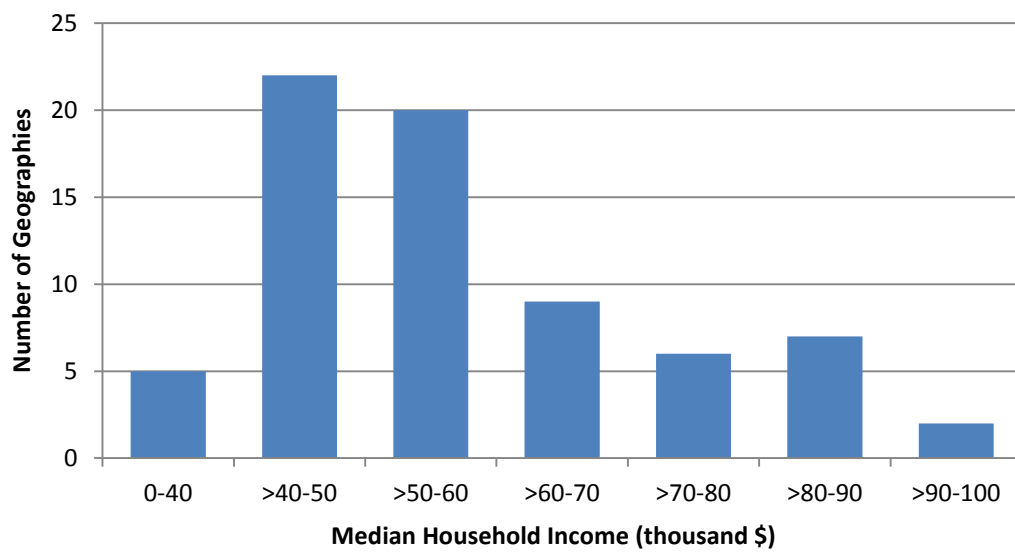


Exhibit 3. Distribution of Unemployment Rate (%)

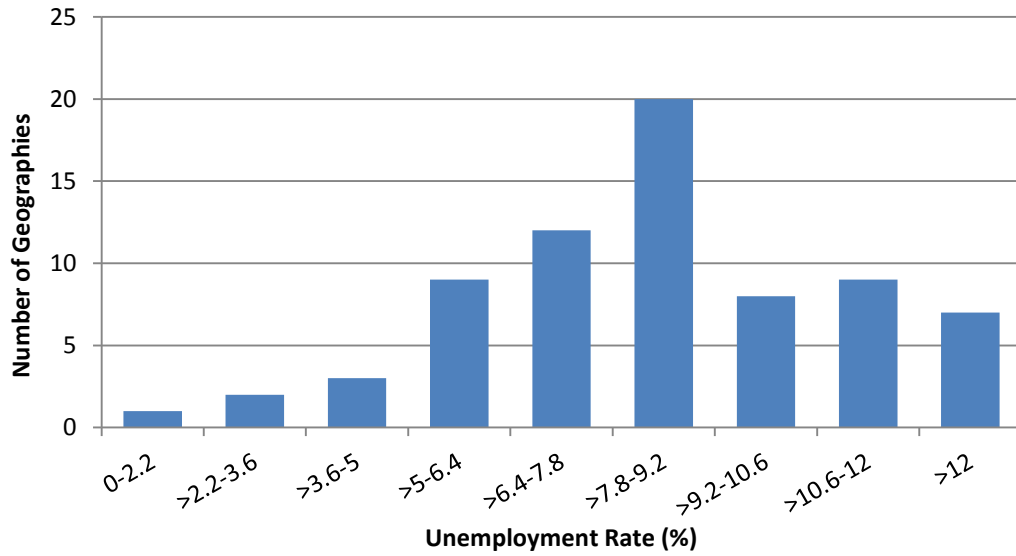


Exhibit 4. Distribution of Population Below Poverty Level (%)

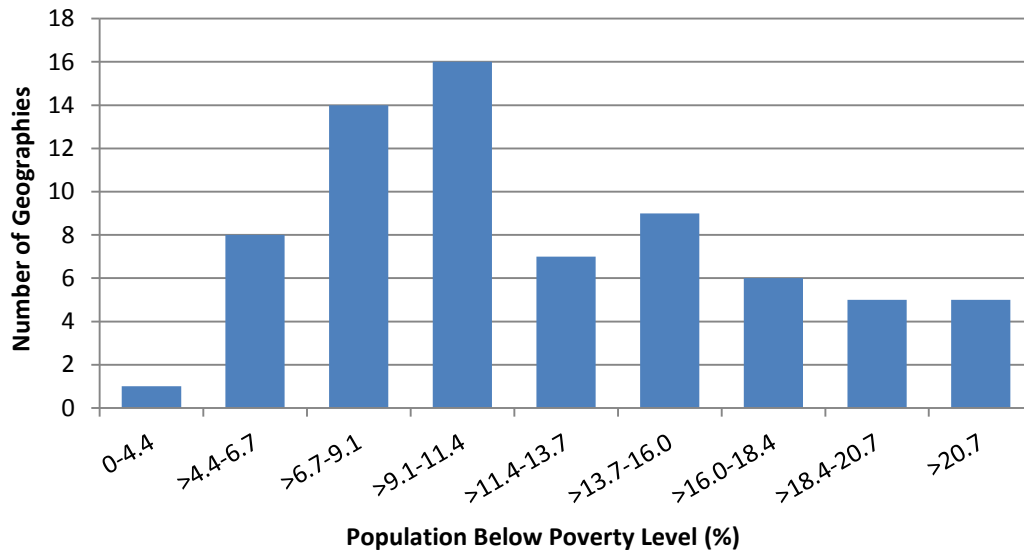


Exhibit 5. Distribution of Population Density (Persons/Sq. Mile)

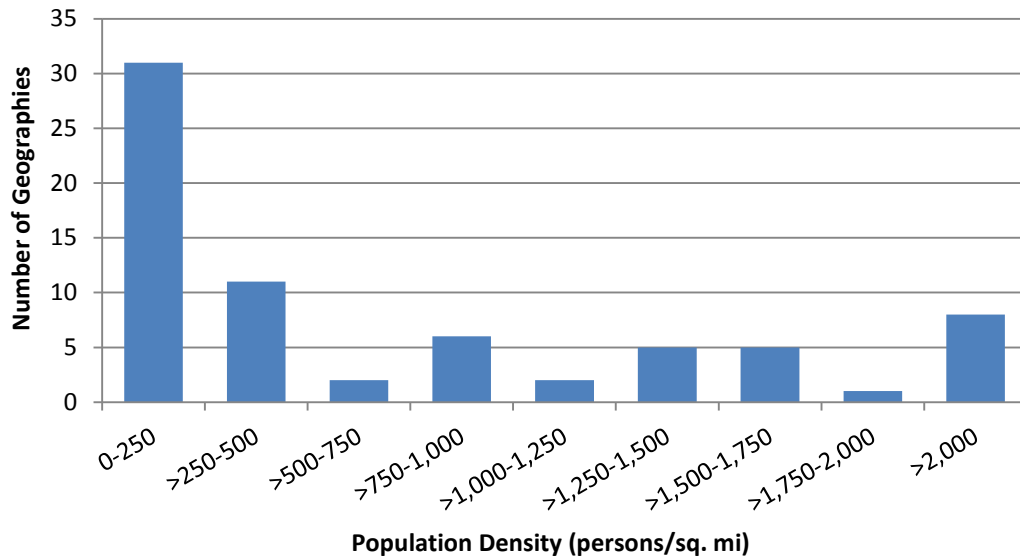


Exhibit 6. Distribution of Housing for Seasonal, Recreational, or Occasional Use (% of Total Housing)

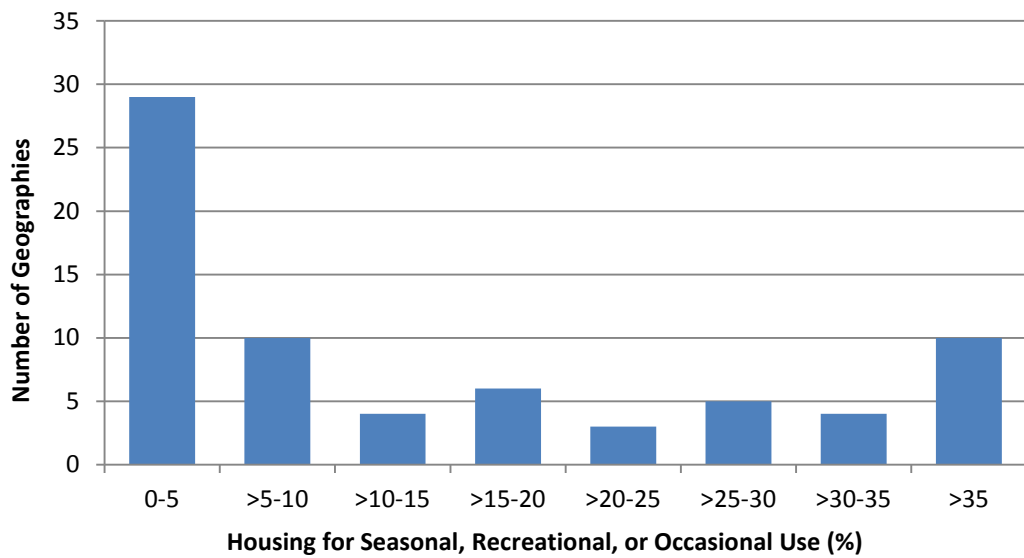
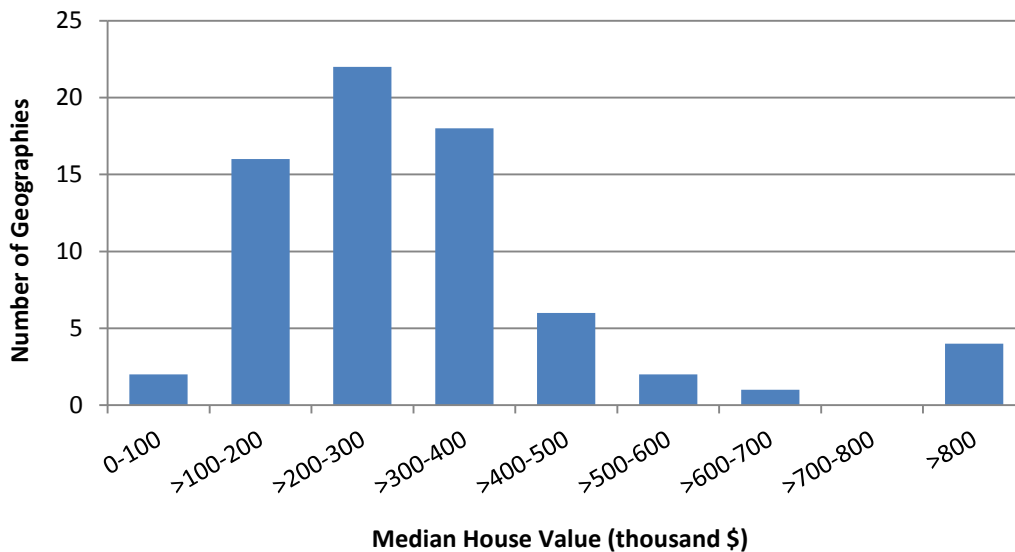
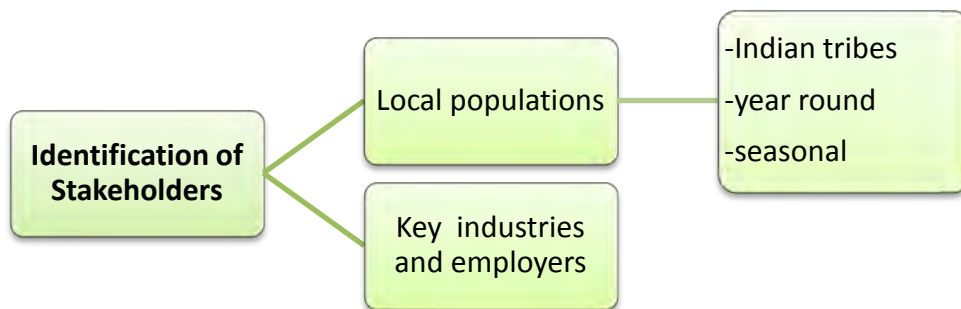


Exhibit 7. Distribution of Median House Value (Thousand \$)



3 Identification of Stakeholders

The profiles also provide information on local populations and economic institutions of a geography, which help identify relevant stakeholders for each geography. The exhibit below displays examples of potential stakeholders in a geography.



The local population includes year-round residents and seasonal populations. Where information is available, the profiles also provide information on past and current tribal communities in the area. Demographic information for the year-round population are included in the profile because these factors may affect the attitudes that local populations have towards wind facilities.

In addition to year-round residents, the local population includes seasonal populations that consist of tourists and seasonal residents (herein will be incorporated into the term tourists). Seasonal (i.e., winter and summer) change in employment in leisure and hospitality industries can serve as a proxy for a change in seasonal population. Each profile presents seasonal population data, including seasonal changes in tourism-related employment and the percentage of houses reported by the U.S. Census Bureau as serving a “seasonal, recreational, or occasional

use.” High values of these metrics suggest that a geography experiences seasonal influxes of tourists. Information about seasonal population change is important because tourists influence the character of a geography and may affect its potential sensitivity to impacts of offshore wind development. For example, a large tourist base could increase a geography’s sensitivity to impacts from offshore wind if tourists begin to alter their travel patterns due to the offshore wind facility locations.

In addition to the local population, key employers are major stakeholders that could be affected by offshore wind development. Each profile lists the principal employers and industries in each geography analyzed.

To provide a contextual background for each individual profile, the following figure displays the distribution of quantitative stakeholder characteristics across the entire study area. The only two sets of quantitative data that could be graphed in a distribution chart were the percentage of businesses that were small and the seasonal change in leisure/ hospitality employment. All other stakeholders data was qualitative.

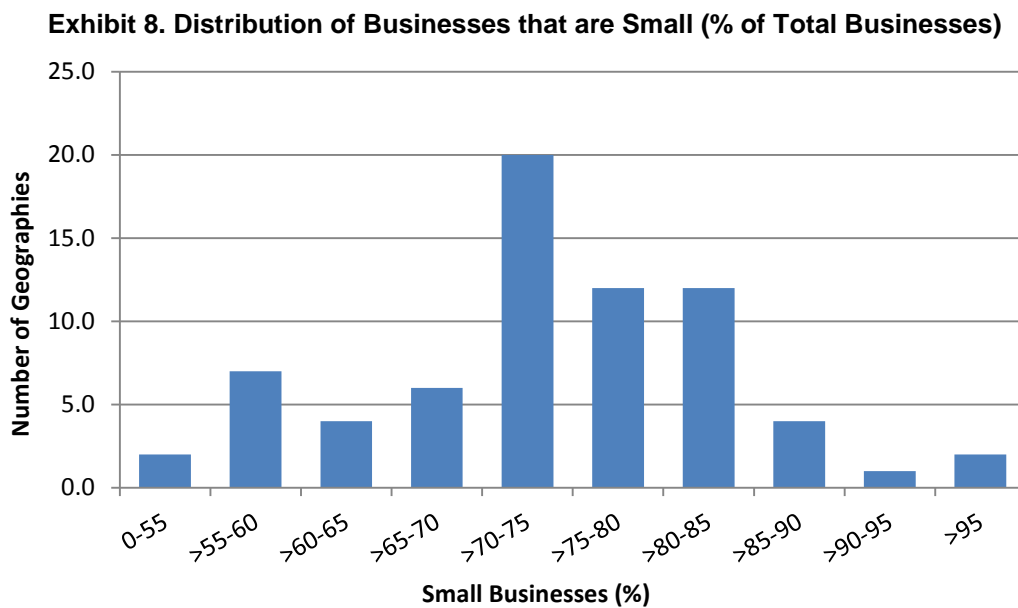
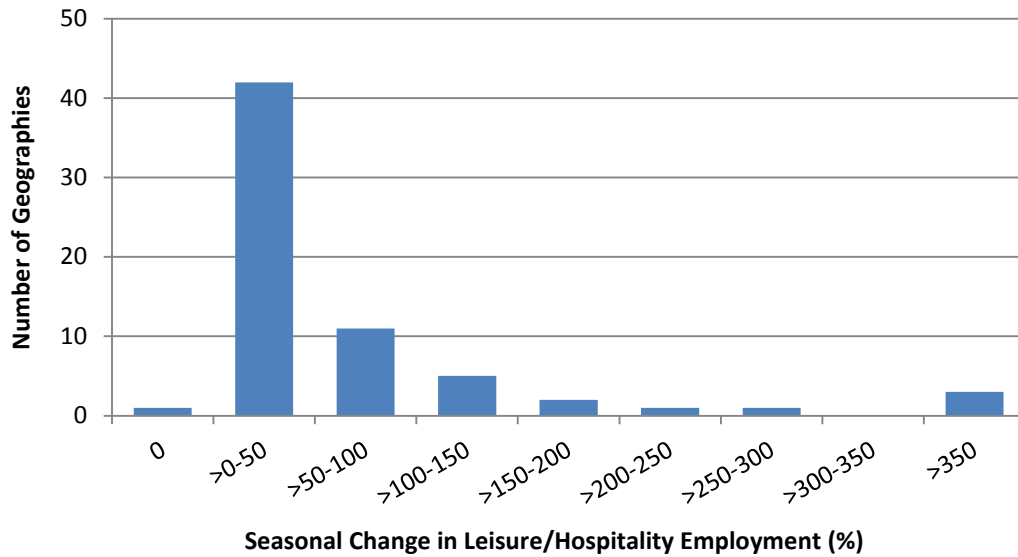
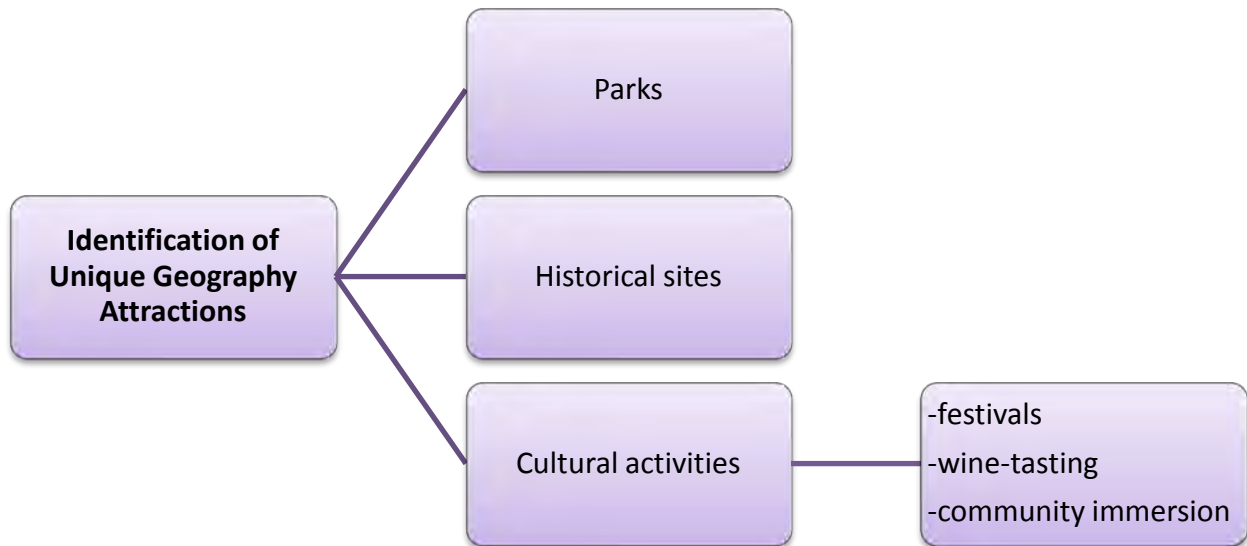


Exhibit 9. Distribution of Seasonal Change in Leisure/Hospitality Employment (% of Total Employment)



4 Identification of Unique Geography Attractions

Each profile provides a background about the unique events and tourist attractions specific to each geography. Some of the events and attractions listed may not be impacted by offshore wind development, but they were included to provide contextual background only. Examples of unique events and attractions are presented in the following chart.



The profiles report the presence of national parks and refuges in the analyzed geographies. Approximately two-thirds of the geographies have one or more national parks or wildlife refuges; the average being one national park or wildlife refuge per geography. Many of the coastal wildlife refuges serve as important natural tourist attractions where visitors observe wildlife and engage in outdoor sports.

The profiles also provide a qualitative background of the region's history and historical sites. For many communities, regional history provides the foundation for the community's lifestyle, traditions, and events, which attract both residents and tourists to the area. Historical landmarks also draw people to the area. Many of the profiles contain information about sites listed on the National Register of Historic Places and/or those preserved as national parks or monuments. Sites are located inland (e.g., historic architecture), on the coast (e.g., lighthouses), and offshore (e.g., shipwrecks).

The geographies vary in terms of their tourism-related physical infrastructure (e.g. boardwalks). Some geographies offer minimal infrastructure, in which case tourism might be focused on nature-based activities or community immersion. Other geographies have highly developed infrastructure and amenities (e.g., transportation networks, hotels, water parks, boardwalks, stadiums, marinas, yacht clubs, and shopping and dining venues). The extent and the nature of infrastructure development could be an indicator of a geography's sensitivity to impacts from further development.

To provide a contextual background for the individual profiles, the following figures display the distribution of quantitative characteristics associated with unique events and attractions across the entire study area.

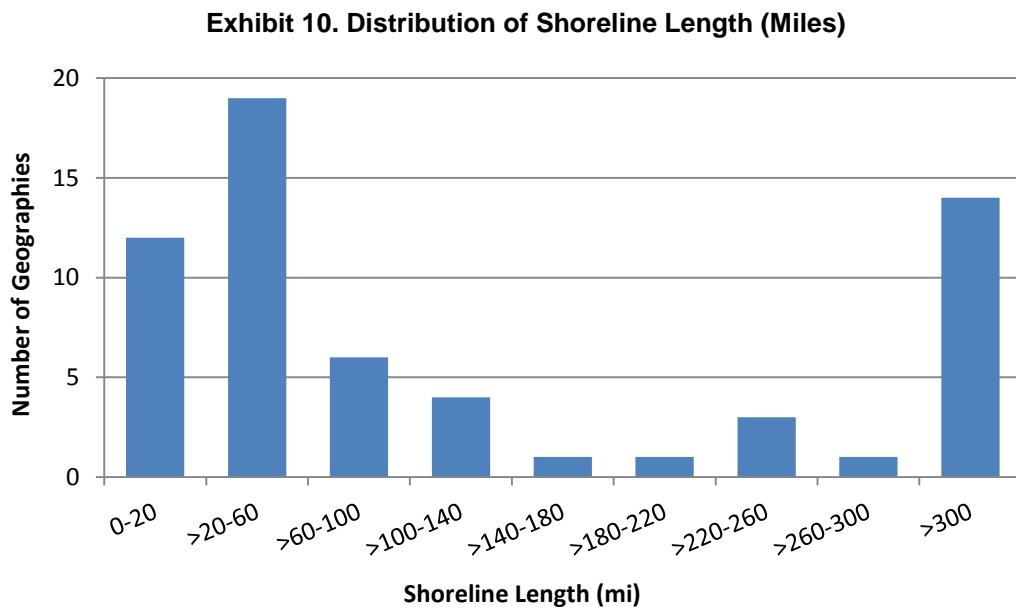
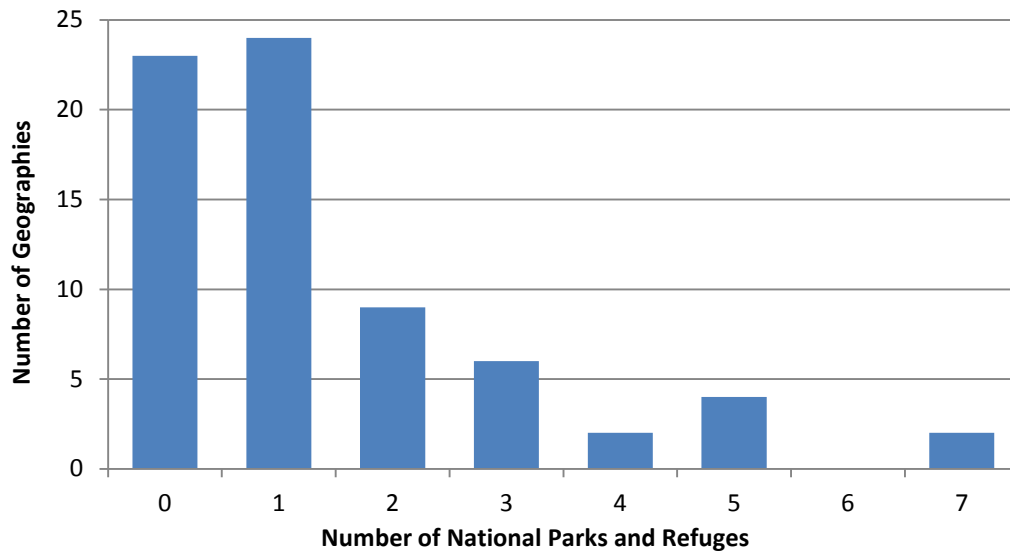
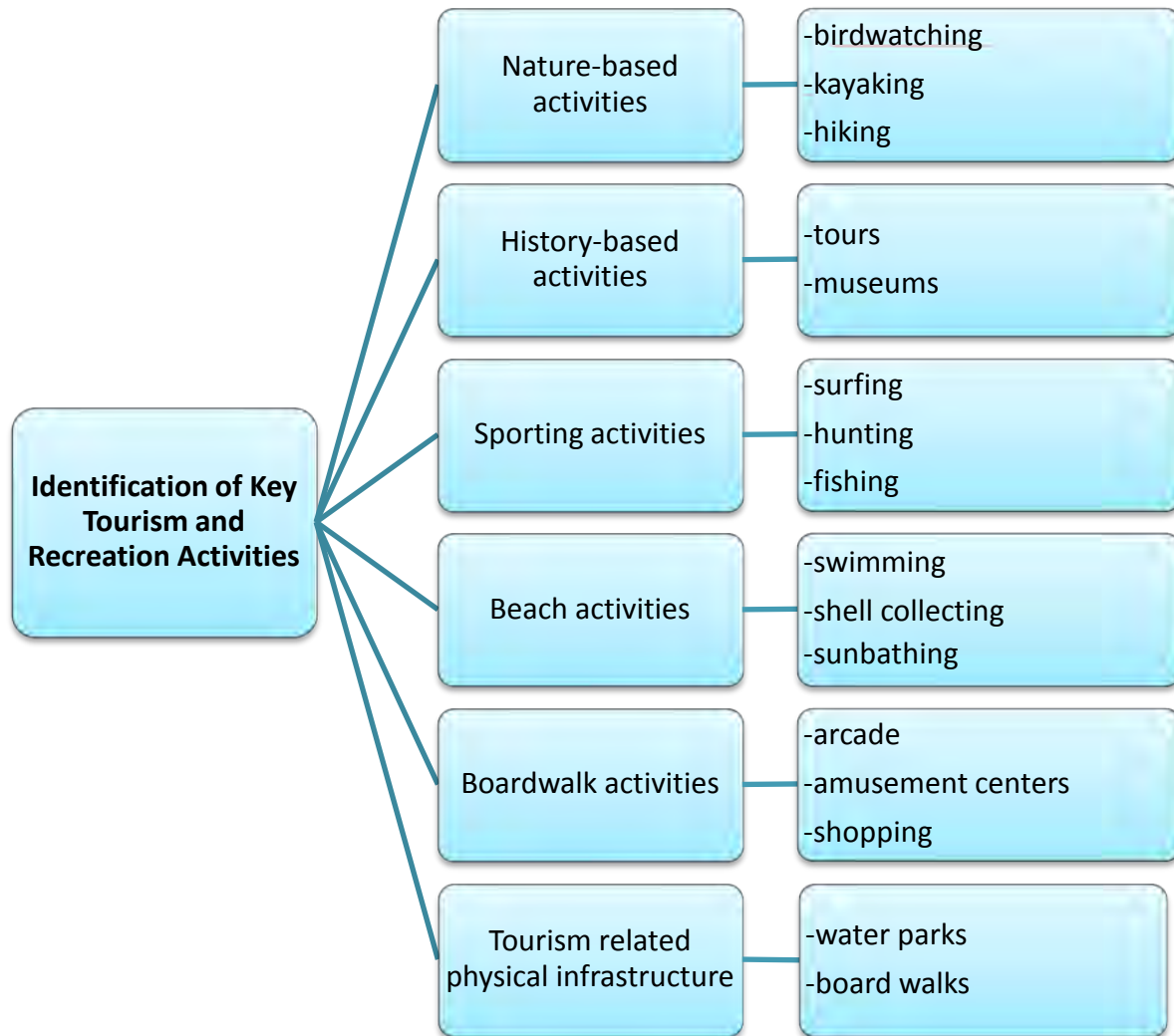


Exhibit 11. Distribution of Number of National Parks and Refuges



5 Identification of Key Tourism and Recreation Activities

Each profile provides information on the key tourism and recreation activities for each geography. Examples of these activities are displayed in the chart below.



The profiles summarize the nature of recreational activities and identify some of the major community events in each geography. Some geographies provide a diversity of recreational options, while others offer a more focused selection. The profiles provide information on annual festivals or events – many of which have a coastal or marine focus – as well as information on other cultural or historical traditions unrelated to the coast. Geographies that host events focused on coastal and marine activities (e.g., fishing, water sports) might be more sensitive to impacts of offshore wind development, both positive and negative. Alternatively, geographies that draw crowds to events focused on other activities (e.g., music, food, onshore sports) might be less sensitive.

Each profile also reports several metrics relating to the size and significance of the tourism economy, including the amount of direct spending by tourists, the portion of ocean jobs related to tourism, and the share of the ocean jobs that are connected to tourism. Although the ocean economy represents only a piece of the overall economy, this indicator is a useful measure of the geography’s sensitivity to impacts of offshore wind development. Statistics on the ocean-based tourism industry are particularly relevant.

To provide a contextual background for the individual profiles, the following figures contain the distribution of quantitative tourism and recreation characteristics across the entire study area.

Exhibit 12. Distribution of Number of Hotels

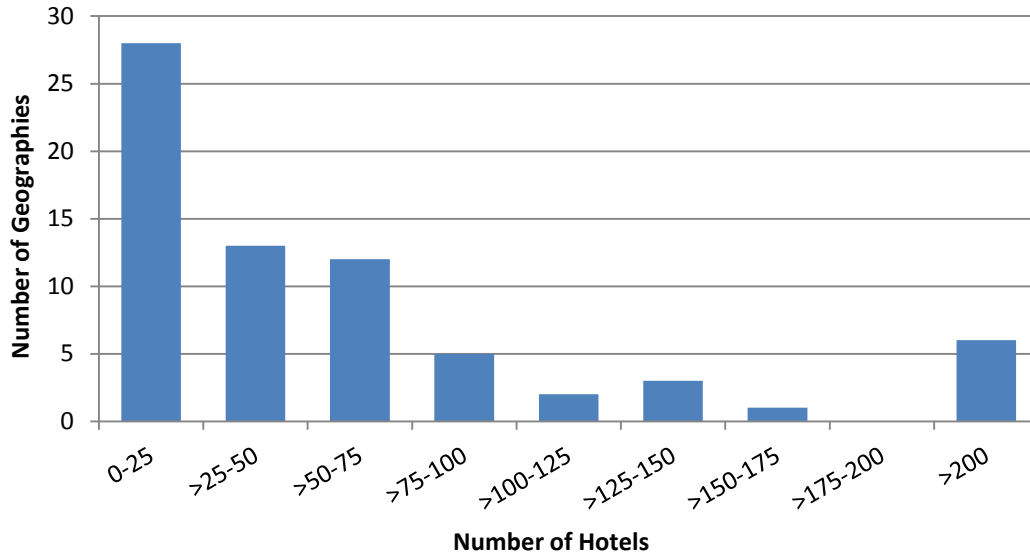


Exhibit 13. Distribution of Number of Leisure/Hospitality Establishments

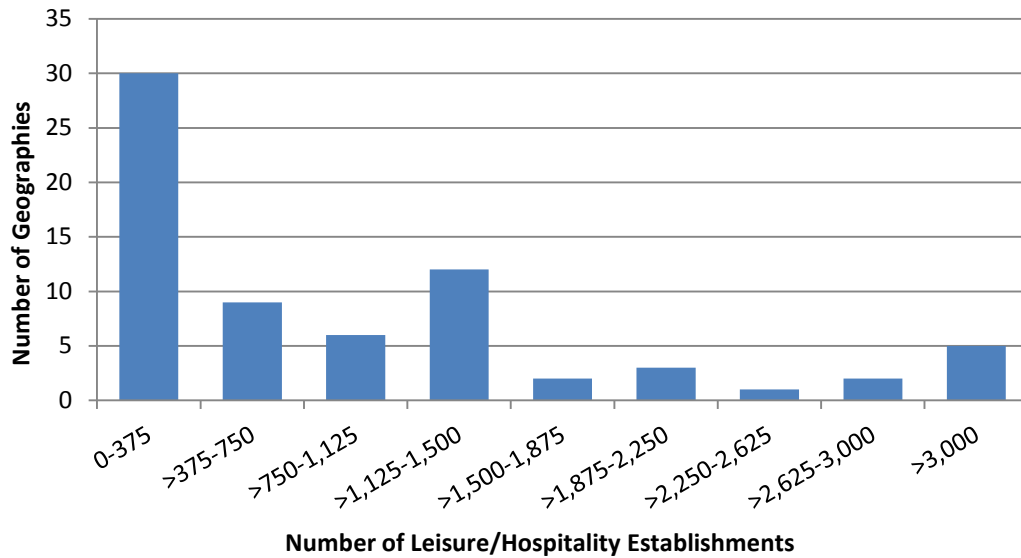


Exhibit 14. Distribution of Ocean Jobs Related to Tourism (% of Total Ocean Jobs)

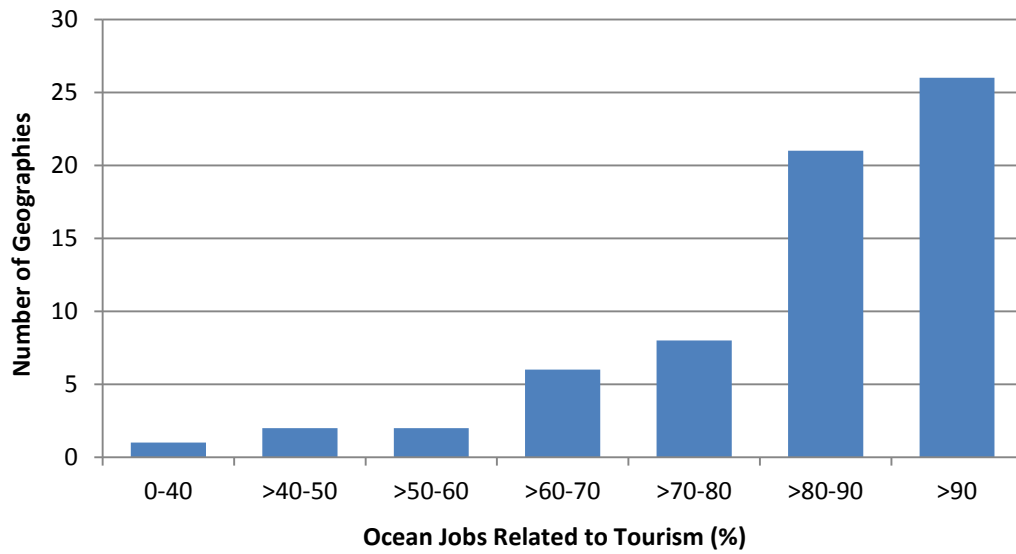


Exhibit 15. Distribution of Tourism Spending (Million \$)

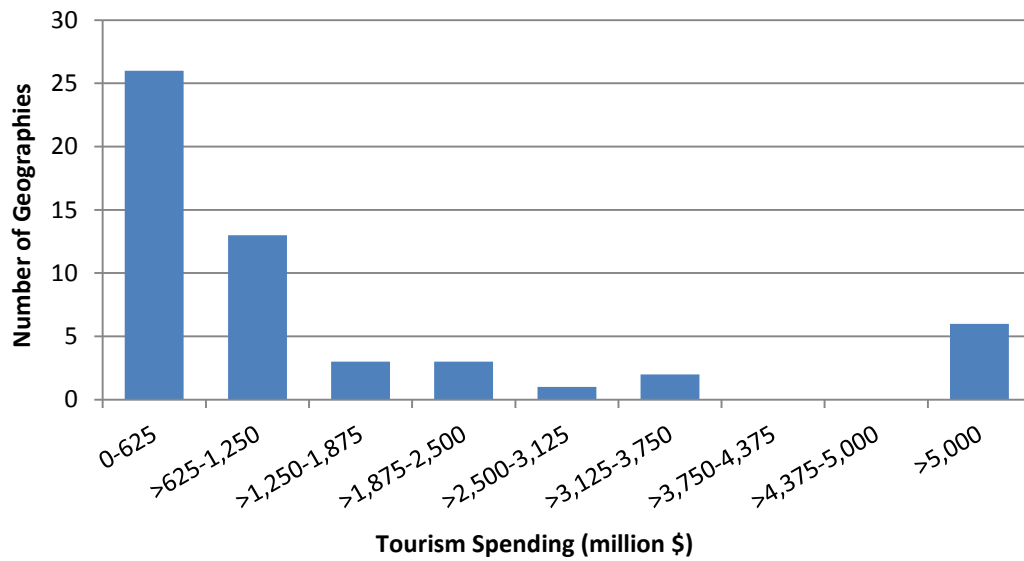


Exhibit 16. Distribution of Average Leisure/Hospitality Employment (Thousand Employees)

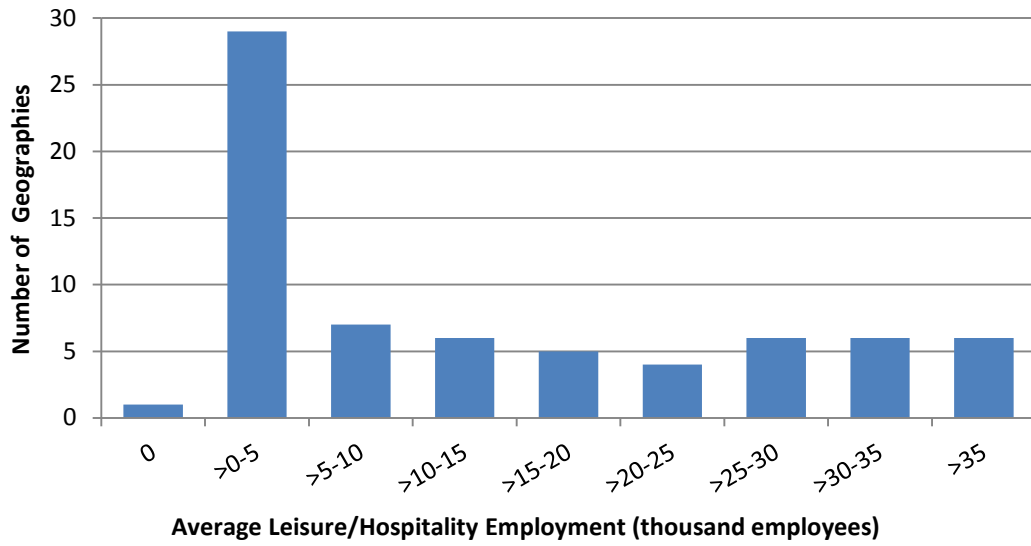
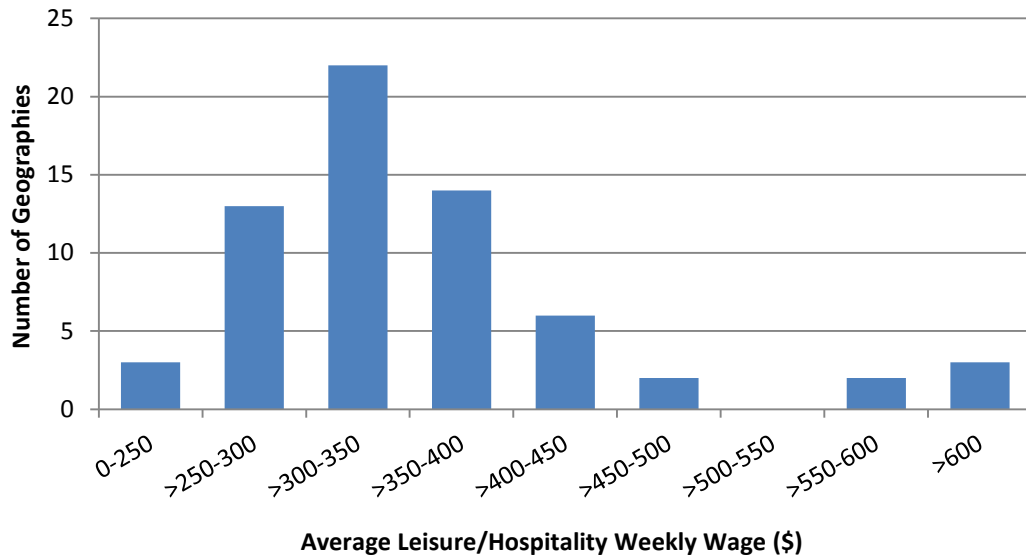


Exhibit 17. Distribution of Average Leisure/Hospitality Weekly Wage (\$)



Section II – Community Profiles

Fairfield County, Connecticut

1. Synopsis

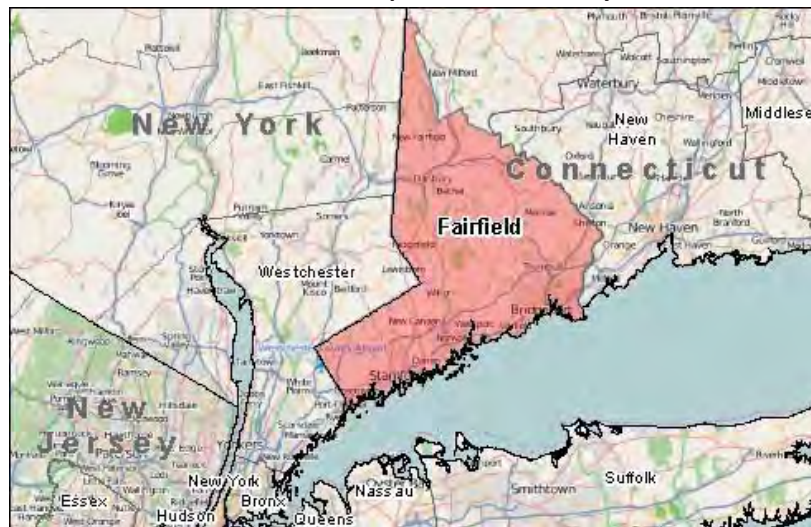
Fairfield County, Connecticut is the western-most county in Connecticut, and the inner-most on Long Island Sound. Fairfield County is one of the highest-income counties in the United States, with many of its residents commuting daily to New York City for work. Fairfield County is comprised of 23 towns with relatively high population and housing densities, the most populous being the City of Bridgeport. The County's population is just under one million people (U.S. Census Bureau, 2010a).

Tourism represents a sizable portion of the Fairfield County ocean economy. According to the National Oceanic and Atmospheric Administration, approximately 87.2 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 74.7 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 1,078 establishments dedicated to the ocean economy which employed 12,783 people (National Ocean Economics Program, 2012).

2. Location

Fairfield County, shown in Exhibit 1, is located in the southwest corner of Connecticut, approximately 40 miles northeast of New York City (Google, Inc., 2012). It has a land area of 837 square miles and includes over 30 miles of shoreline (U.S. Census Bureau, 2010a; Western Connecticut Visitors Bureau, 2012a). Fairfield County is bordered by New Haven County, Connecticut to the east, Westchester County, New York to the west, and the New York Counties of Suffolk and Nassau opposite the Long Island Sound to the south.

Exhibit 1. Map of Fairfield County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Fairfield County is most accessible by car and rail. Interstate-95 runs the length of southern Fairfield County and connects Fairfield to Boston, Massachusetts and New York City (Google, Inc., 2012). Amtrak's Regional Northeast Rail Line from Virginia to Massachusetts makes several stops in Fairfield

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

County; Metro North’s New Haven Rail Line has one stop in each of the coastal towns of Fairfield County, and runs express commuter trains to New York City and the city of New Haven (Amtrak, Inc., 2012; American Public Transportation Association, 2012). Fairfield County has one ferry line from Bridgeport, CT to Port Jefferson, NY. There are two smaller airports in the County, though the New York international airports are within an hour transit (American Public Transportation Association, 2012).

3. Demographics

Fairfield County has a year-round population of 895,030, an increase of just less than four percent since 2000 (U.S. Census Bureau, 2010a). The following three tables profile Fairfield County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has grown modestly over the past decade.

Exhibit 2. Population Profile

	Fairfield	Connecticut
Year-Round Population	916,8259	3,574,907
Population Change (2000-2010)	3.88%	4.95%
Median Age (years)	39.3	40
Percent Female	51.4%	51.3
Percent Foreign Born	20.1%	13.2%
<i>Ethnic Profile</i>		
White	74.8%	77.9%
Black/African American	10.8%	10.1%
Asian	4.6%	3.8%
Hispanic/Latino	16.9%	13.4%
American Indian	0.3%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Fairfield	Connecticut
Unemployment Rate	10.7%	10.5%
Percent Out of Labor Force	32.5%	32%
Median Household Income	\$74,831	\$64,032
Percent of Population Below Poverty Line	6.4%	10.1%
<i>Educational Attainment</i>		
High School Diploma	23.4%	28.2%
Bachelor’s Degree	24.7%	20.2%
Graduate/Professional Degree	18.9%	15.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Fairfield	Connecticut
Population Density (people/sq. mile)	1,467.2	738.1
Housing Density (structures/sq. mile)	578.1	307.3
Housing Structures that Are Independent Units	64.5%	75.4%
Occupied Units	92.9%	91.3%
Seasonal, Recreational, or Occasional Use	1.5%	2.0%
Median House Value	\$477,700	\$296,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to the settling of the Europeans to the area, Fairfield County was home to many small native Tribes. Today, the Golden Hill Paugussett Indian Nation is the lone Connecticut state-recognized tribe in the County. The Tribe has a one-quarter acre reservation in the town of Trumbull in Fairfield County, though it also has another larger reservation in New London County. The Tribe's Trumbull reservation is the oldest in the state and the smallest in the United States (Golden Hill Indian Tribe, 1999).

Dutch explorers were the first Europeans to Fairfield County in 1614, although the region was not settled until the following decade by English Puritans and Congregationalists. In the late 1960's and early 1970's, several corporations moved their headquarters out of New York City as part of a "decentralization trend," to such cities as Bridgeport and Stamford. This trend resulted in Fairfield County now being made up of four modest-sized cities, and several smaller suburban "commuter" towns. The short commute to New York City and the influx of corporate headquarters to Fairfield cities have positioned Fairfield County as one of the wealthiest in America (USGenNet, 2004).

Three larger festivals in Fairfield County include the Norwalk Oyster Festival, the Gathering of the Vibes, and the Festival of Lighthouses at the Maritime Aquarium. The Oyster Festival hosted by the city of Norwalk each September celebrates the historic importance of the oyster harvest to the region. The Gathering of the Vibes is a weekend-long waterfront concert, and well attended by all ages who camp through the weekend (Gathering of the Vibes, 2012; Norwalk Seaport Association, Inc., 2012; The Maritime Aquarium at Norwalk, 2012). Fairfield County lists several smaller parades and festivals throughout the summer months as well.

5. Coastal Amenities

Much of the thirty-mile coastline in Fairfield County is sand beach, and a destination for sunbathers, swimmers, and beach-walkers; the calm ocean within Long Island Sound is favorable to boaters but prevents any surfing (Western Connecticut Visitors Bureau, 2012a). The County has over 20 public beaches and several more private beaches. There are approximately five harbors, 25 marinas/boatyards, and 20 yacht clubs in Fairfield County (Western Connecticut Visitors Bureau, 2012b). The Weir Farm National Heritage Site is the sole national park in the County and there is no nationally-protected land in the County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Popular coastal attractions in Fairfield County include the Maritime Aquarium in Norwalk and some ten historic (inactive) lighthouses that once protected the rocky shores throughout the County (The Maritime Aquarium at Norwalk, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 27,291 business establishments in Fairfield County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County are Boehringer Ingelheim Corporation, Ceci Brothers Inc., and Danbury Hospital (Connecticut Department of Labor, 2012). According to the 2010 Census, approximately 74.7 percent of businesses in Fairfield County are small (U.S. Census Bureau, 2009).²

7. Coastal Tourism/Recreation Activity

Travel guides list fishing/fly-fishing and canoeing/kayaking as popular marsh, stream, and near-shore ocean activities. The numerous beaches listed on the Western Connecticut Visitor's Bureau website offer variation between "small, quiet" beaches and larger beaches with boardwalks, concessions, bathhouses, and beach volleyball and tennis courts. The areas nearer to wetlands and marshes offer bird and other wildlife viewing areas.

According to National Oceanic and Atmospheric Administration, an estimated 87.2 percent of the ocean-related jobs in Fairfield are related to tourism (National Oceanic and Atmospheric Administration, 2012). Moreover, according to the Connecticut Center for Economic Analysis, tourism expenditures in Fairfield County at the turn of the century reached just under \$1.5 billion per year (Cartensen, et. al., 2001).

U.S. Bureau of Labor Statistics data (Exhibit 5) show that leisure and hospitality employment in Fairfield County increases in summer months. There are 2,657 establishments dedicated to leisure and hospitality alone in Fairfield County; the average weekly wage for employees of these establishments is \$486. Leisure and hospitality employment in Fairfield County increased by 7,772 jobs, or 24.9 percent, between the winter and summer of 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, 1,078 establishments dedicated to the ocean economy in Fairfield County, employed 12,783 people. In 2000, there were 1,056 ocean-related establishments that employed 14,352 people. Whereas the number of ocean-related establishments increased by 2.1 percent between 2000 and 2009, employment decreased by 10.9 percent (National Ocean Economics Program, 2012).

There are approximately 75 hotels, 10 bed and breakfasts, and five campgrounds in Fairfield County (U.S. Census Bureau, 2009). 1.5 percent of all houses in Fairfield County are for seasonal, recreation, or occasional use (U.S. Census Bureau, 2010a).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics list the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 details each of Fairfield's tourist industries.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Fairfield County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change* ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	336	566	460	10%
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	117	215	171	-36.2%
Renting Pleasure Boats (532292)	0	0	0	-
Land-Based				
Hotel Employment (72111)	2,508	2,642	2,606	-2.3%
Restaurant Employment (7221 & 7222)	18,382	20,699	19,729	12.4
Amusement, Gambling, Other Recreation (713)	5,114	8,996	6,646	2.3
General Tourism				
Travel Agencies (561510)	463	492	482	-26.2
Tour Operators (561520)	312	368	341	-8.3
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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Middlesex County, Connecticut

1. Synopsis

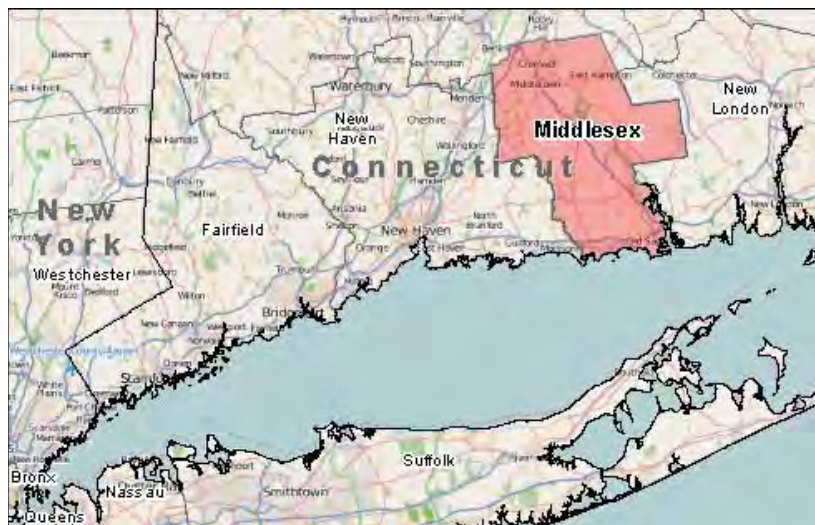
Middlesex County, Connecticut lies in central Connecticut along the northern shore of Long Island Sound. Middlesex County is comprised of 15 towns with very low population and housing densities, the most populous being Middletown, with a population of 47,438. The County's population of 165,676 people makes it one of the smallest in the state by that measure (U.S. Census Bureau, 2010a).

Tourism is an important aspect of Middlesex County's ocean economy. According to the National Oceanic and Atmospheric Administration, 88.3 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 74.4 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 207 ocean-related establishments employed 2,776 people in the County (National Ocean Economics Program, 2012).

2. Location

Middlesex County, shown in Exhibit 1, lies directly between Boston, Massachusetts and New York City: Boston is approximately 130 miles to the northeast and New York City is approximately 130 miles to the southwest (Google, Inc., 2012). The County has a land area of 439 square miles, but only three of its fifteen towns (62 square miles) are coastal, though a few others border the Connecticut River (U.S. Census Bureau, 2010a). Middlesex County is bordered by New Haven County to the west, New London County to the east, and the New York County of Suffolk opposite the Long Island Sound to the south.

Exhibit 1. Map of Middlesex County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Middlesex County is predominantly by car, as Interstate-95 runs along the coastal section of the County (Google, Inc., 2012). Amtrak's Northeast Regional Rail Line makes a stop in Old Saybrook along its routes to Boston, Massachusetts and New York City (Amtrak, Inc., 2012). The Connecticut Commuter Rail's Shore Line East runs commuter routes to New Haven, Bridgeport, Stamford, and New

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

York City as well, with stops in smaller towns en route (American Public Transportation Association, 2012). There are two small airports within County bounds, and it is approximately 50 miles to Bradley International Airport in Hartford (American Public Transportation Association, 2012; Google Inc., 2012). The Chester-Hadlyme Ferry is a seasonal ferry crossing the Connecticut River (American Public Transportation Association, 2012).

3. Demographics

Middlesex County has a year-round population of 165,676 (U.S. Census Bureau, 2010a). The following three tables profile Middlesex County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased by almost 7 percent over the past decade.

Exhibit 2. Population Profile

	Middlesex	Connecticut
Year-Round Population	165,676	3,574,097
Population Change (2000-2010)	6.84%	4.95%
Median Age (years)	43.1	40
Percent Female	51.2%	51.3%
Percent Foreign Born	7.8%	13.2%
<i>Ethnic Profile</i>		
White	89.2%	77.6%
Black/African American	4.7%	10.1%
Asian	2.6%	3.8%
Hispanic/Latino	4.7%	13.4%
American Indian	0.2%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Middlesex	Connecticut
Unemployment Rate	8.4%	10.5%
Percent Out of Labor Force	32%	32%
Median Household Income	\$69,566	\$64,032
Percent of Population Below Poverty Line	7.4%	10.1%
<i>Educational Attainment</i>		
High School Diploma	30.6%	28.2%
Bachelor's Degree	21.3%	20.2%
Graduate/Professional Degree	13.8%	15.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Middlesex	Connecticut
Population Density (people/sq. mile)	448.6	738.1
Housing Density (structures/sq. mile)	202.7	307.3
Housing Structures that Are Independent Units	76.5%	75.4%
Occupied Units	89.8%	91.3%
Seasonal, Recreational, or Occasional Use	5.4%	2.0%
Median House Value	\$307,400	\$296,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Though Dutch explorers first charted the Connecticut River in 1614, Middlesex County is understood to have been first settled in 1635 by the English along with neighboring Connecticut and Massachusetts colonies. Middlesex County flourished in the eighteenth century; the City of Middletown was the largest and most prosperous settlement in Connecticut as a result of its thriving Connecticut River port. When British-American trade relations strained in the years leading up to the War of 1812, Middletown's port suffered greatly. During the War, gun manufacturing was a prominent industry. In the years that followed, however, the center of business – including gun manufacturing – moved to the neighboring cities of Hartford and New Haven, and Middlesex County transitioned to become predominantly sparsely-populated suburban communities in the midst of several cities. The Middlesex County Chamber of Commerce notes the County's "wooded hills and picturesque villages" as well as its "historic towns, rolling farmlands, and scenic country roads" (City of Middletown, CT, 2012; Connecticut Living, 2012).

The west bank of the Connecticut River was once home to the Mattabesett Tribe and the Mohegans of the Algonquian Tribe—two rival peoples. Conflicts between the tribes and a smallpox outbreak reduced the populations of each of the tribes. There are no federally- or state-recognized native tribes living in Middlesex County today (Connecticut Living, 2012).

Middlesex County hosts two major marine-related festivals annually: the Lobster Festival hosted by the Chester Rotary Club in Chester occurs in September, and the Connecticut River Shad Bake hosted by the Essex Rotary Club in Essex happens every year in mid-summer (Connecticut River Valley, 2009).

5. Coastal Amenities

The rather small coastline in Middlesex County is comprised of both sandy, mostly public beaches, as well as some rocky and/or tidal shoreline. The County's three public beaches offer limited beach access for tourists who are unable to access private beaches (ConnQuest, 2012). The Steward B. McKinney National Wildlife Refuge is the sole national park in the County, which protects several miles of tidal land (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are three harbors, 10 marinas/boatyards, and two yacht clubs in the County (Connecticut Water Trails Association, 2011).

The Gillette Castle in Chester is Middlesex's most well-known historical attraction. Built in 1914, the Gillette Castle was once the home of actor William Gillette. In 1943, years after his death, the State of Connecticut claimed the property, and has since allowed visitors to the Gillette Castle State Park that sits atop a hill overlooking the Connecticut River. There are no major coastal landmarks in Middlesex County (State of Connecticut, Department of Energy & Environmental Protection, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 4,227 business establishments in Middlesex County in 2010. The largest employers in the County are the Connecticut Valley Hospital, Lee Company USA, and Middlesex Hospital (Connecticut Department of Labor, 2012). According to the 2009 Census, approximately 74.4 percent of businesses in Middlesex County are small (U.S. Census Bureau, 2009).²

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

7. Coastal Tourism/Recreation Activity

Middlesex County beaches are best suited for sunbathers, snorkelers, and beach walkers. The calm waters of Long Island Sound create the pleasant environment for boaters and prevent any surfing along the coast. Travel guides highlight both quiet undeveloped beaches as well as beaches with such amenities as concession stands, tennis courts, and the like. Because Middlesex County beaches are predominantly private, tourists visit only a few smaller beaches. The Stewart B. McKinney National Wildlife Refuge is a hotspot for on-shore wildlife viewing (U.S National Park Service, 2012).

Travel guides for Middlesex County highlight the historic small New England charm much more so than the beach or coastal amenities; it appears that tourism is directed toward the historic aspects of Middlesex County and less so on the coastal aspects.

According to National Oceanic and Atmospheric Administration, an estimated 88.3 percent of the ocean-related jobs in Middlesex are related to tourism (U.S. National Park Service, 2012). According to the Connecticut Center for Economic Analysis, tourism expenditures at the turn of the century in Middlesex County were just short of \$300 million per year (Connecticut Center for Economic Analysis, 2001). There are 495 establishments dedicated to leisure and hospitality alone in Middlesex County; the average weekly wage for employees of these establishments is \$394. Leisure and hospitality employment in Middlesex County increased by 2,123 jobs, or 37.1 percent, between winter and summer in 2010, which reflects the seasonal nature of the industry (U.S Bureau of Labor Statistics, 2010).

In 2009, 207 ocean-related establishments in Middlesex County employed 2,776 people. In 2000, there were 182 such establishments, and 2,730 people were employed in the sector. In the nine years between 2000 and 2009, the number of ocean-related establishments therefore increased by 13.7 percent, but the number of people employed by those establishments increased only by 1.7 percent (National Ocean Economics Program, 2012).

There are approximately 15 hotels, one bed and breakfast, and five campgrounds in Middlesex County (U.S. Census Bureau, 2009). 5.4 percent of all houses in Middlesex County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and recreation industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates the change in employment by season.

Exhibit 5. Middlesex County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	% Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	-
Marinas (713930)	207	353	353	8.3
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	62	90	77	-43.4
Renting Pleasure Boats (532292)	-	-	0	-
Land-Based				
Hotel Employment (72111)	641	832	722	-
Restaurant Employment (7221 & 7222)	3,605	3,059	4,025	9.6
Amusement, Gambling, Other Recreation (713)	776	1,459	1,054	14.2
General Tourism				
Travel Agencies (561510)	31	29	29	-
Tour Operators (561520)	0	0	0	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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New Haven County, Connecticut

1. Synopsis

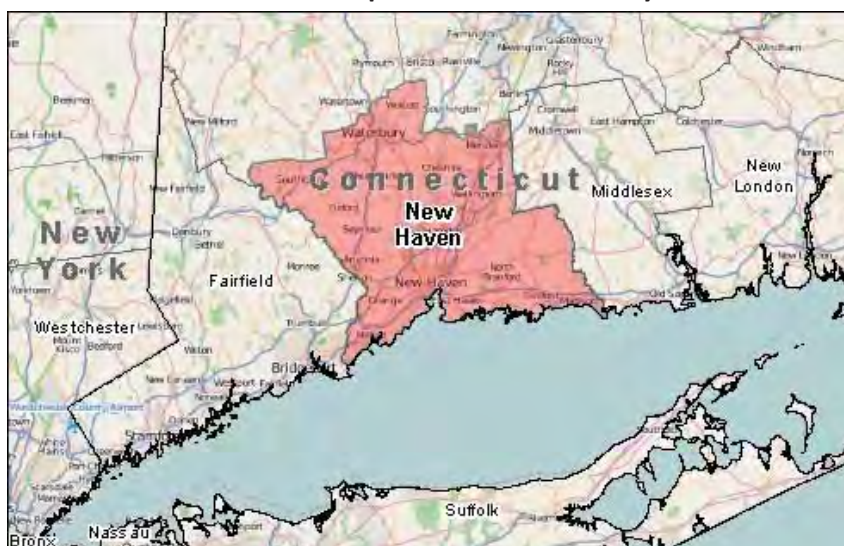
New Haven County, Connecticut lies in central Connecticut along the northern shore of Long Island Sound. New Haven County is comprised of 27 towns and cities with relatively high population and housing densities, the most populous city being New Haven, with a population of 129,779. The County's population of 862,477 people is the third largest in the state of Connecticut (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, approximately 85.8 percent of all ocean related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). U.S. Census Bureau data states that 64.2 percent of the ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 726 ocean-related establishments employed 8,860 people in the County (National Ocean Economics Program, 2012).

2. Location

New Haven County, shown in Exhibit 1, lies directly between Boston, Massachusetts and New York City: Boston is approximately 130 miles to the northeast and New York City is approximately 130 miles to the southwest (Google, Inc., 2012). It has a land area of 439 square miles, but only three of its fifteen towns (62 square miles) are coastal (U.S. Census Bureau, 2010a). New Haven County is bordered by Fairfield County to the west, Middlesex County to the east, and the New York County of Suffolk opposite the Long Island Sound to the south.

Exhibit 1. Map of New Haven County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to New Haven County is predominantly by car and rail. The southern portion of New Haven County is connected by both Interstate-95, as well as a regional and commuter rail network (Google, Inc., 2012). Amtrak's Northeast Regional Line, with a stop in the city of New Haven, routes as far north as Boston, Massachusetts, and as far south as Virginia Beach, Virginia, with stops that include New York City and Washington, D.C (Amtrak, Inc., 2012). The Connecticut Commuter Rail's Shore Line East route connects New Haven to the cities of New London, Bridgeport, Stamford, and New York. The Tweed New Haven Regional Airport serves predominantly private charters, though US Airways Express does provide

daily flights. Bradley International Airport is approximately 40 miles north of New Haven County. There are no ferries in New Haven County, though the City of New Haven is currently establishing a New Haven-Long Island route (American Public Transportation Association, 2012).

3. Demographics

New Haven County has a year-round population of 862,477 (U.S. Census Bureau, 2010a). The following three tables profile New Haven County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased modestly over the past decade.

Exhibit 2. Population Profile

	New Haven	Connecticut
Year-Round Population	862,477	3,574,097
Population Change (2000-2010)	4.67%	4.95%
Median Age (years)	39.2	40
Percent Female	51.9%	51.3%
Percent Foreign Born	11.4%	13.2%
<i>Ethnic Profile</i>		
White	74.8%	77.6%
Black/African American	12.7%	10.1%
Asian	3.5%	3.8%
Hispanic/Latino	15%	13.4%
American Indian	0.3%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	New Haven	Connecticut
Unemployment Rate	10.9%	10.5%
Percent Out of Labor Force	32.1%	32.0%
Median Household Income	\$57,056	\$64,032
Percent of Population Below Poverty Line	11.7%	10.1%
<i>Educational Attainment</i>		
High School Diploma	31.2%	28.2%
Bachelor's Degree	17.4%	20.2%
Graduate/Professional Degree	14.3%	15.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	New Haven	Connecticut
Population Density (people/sq. mile)	1,426.7	738.1
Housing Density (structures/sq. mile)	598.8	307.1
Housing Structures that Are Independent Units	60.3%	75.4%
Occupied Units	92.4%	91.3%
Seasonal, Recreational, or Occasional Use	1.2%	2.0%
Median House Value	\$273,300	\$296,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

There are currently no federally- or state-recognized native groups in New Haven County. In the early 1600's, however, the Quinnipiac Tribe lived, fished, and farmed on the banks of New Haven Harbor. The 1638 arrival of British merchants began the decline of the native population: the Quinnipiac sold much of their lands to the British colonists who agreed to protect the Tribe from the neighboring Pequot Tribe. Continued fighting and disease eventually diminished the population (City of New Haven, 2012; Connecticut Water Trails Association, 2011b).

New Haven County was first settled in the latter half of the 1630's by English Puritans coming from the newly-established Massachusetts Bay Colony. Although ultimately seeking more religious freedom, the colonists were also attracted to the region for the port capabilities around the city of New Haven. In the late 18th century New Haven County became a hub for manufacturing. As the center of arms manufacturing, war times were especially prosperous for New Haven County. In the mid-1900's, however, trade routes shifted toward Boston, Massachusetts, and the growth of New Haven County had reached its peak. Still, the city of New Haven maintains a large manufacturing industry, and the cities of New Haven, Stamford, and Bridgeport continue to support several rural suburbs within New Haven County (City of New Haven, 2012).

The Milford Oyster Festival is the largest one-day festival in the state of Connecticut, attracting over 50,000 people per year. There are also several smaller festivals dedicated to maritime, history, food, and music throughout the year in New Haven County, though none that rival the size of the Milford Oyster Festival (Milford Oyster Festival, CT, 2012).

5. Coastal Amenities

New Haven's coastline is in some locations urban, and in other locations undeveloped. The County has upwards of 20 public beaches and numerous private beaches, but no national parks, national wildlife refuges, or protected land (ConnQuest, 2012; U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are approximately 5 harbors, fifteen marinas/boatyards, and 5 yacht clubs in the County (Connecticut Water Trails Association, 2011a).

New Haven is home to the tall ship *Amistad* that docks in New Haven Harbor and visits ports worldwide. The *Amistad* is a "floating classroom, icon and monument to many souls that were broken or lost as a result of the transatlantic slave trade" (Connecticut Commission on Culture & Tourism, 2012). The Coastal Center at Milford Point, owned and operated by the Connecticut Audubon Society, is a popular beach- and river-side destination for outdoor enthusiasts (Connecticut Audubon Society, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 19,893 business establishments in New Haven County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County are: Yale University, Bozzuto's Incorporated, and Covidien (Connecticut Department of Labor, 2012). According to the 2009 Census, approximately 64.2 percent of ocean recreation and tourism establishments in New Haven County are small (U.S. Census Bureau, 2009).¹

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

7. Coastal Tourism/Recreation Activity

Consumer reports for some of the approximately 20 beaches in New Haven County range from remote beaches that are ideal for walking to more populous beaches with such amenities as camping, concessions, skate parks, and carousels. As a County within the calm waters of Long Island Sound, swimming and recreational boating are popular beach activities, though not in the industrial waters of New Haven Harbor. On-shore activities include sunbathing, fishing, biking, and hiking.

According to National Oceanic and Atmospheric Administration, approximately 85.8 percent of all ocean-related jobs in New Haven County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures—coastal and otherwise—exceeded \$901,000,000 in 2010 (Carstensen, et. al., 2001). There are 2,147 establishments dedicated to leisure and hospitality alone in New Haven County; the average weekly wage for employees of these establishments is \$331. Leisure and hospitality employment in New Haven County increased by 4,382 jobs, or by only 17.5 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, 726 ocean-related establishments in New Haven County employed 8,860 people. Ocean establishments and employment in the County was drastically lower than just nine years earlier. In 2000, 805 ocean-related establishments employed 11,675 people. Over this nine year period, the number of establishments decreased by 9.8 percent, and the number of people employed by those establishments decreased by 24.1 percent (National Ocean Economics Program, 2012).

There are approximately 75 hotels, 5 bed and breakfasts, and 5 campgrounds in New Haven County (U.S. Census Bureau, 2009). 1.2 percent of all houses in New Haven County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 illustrates the relative stability in tourism-related employment between seasons.

Exhibit 5. New Haven County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	0	0	0	-100% [#]
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	57	80	68	-22.7%
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	1,663	1,740	1,700	100% [^]
Restaurant Employment (7221 & 7222)	18,900	20,727	20,101	6.0%
Amusement, Gambling, Other Recreation (713)	3,088	5,689	3,953	-8.6%
General Tourism				
Travel Agencies (561510)	164	157	157	-38.2%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

[#] The employment figure for Marinas in 2005 was listed as 88.

[^] The employment figure for Hotel Employment in 2005 was listed as 0.

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New London County, Connecticut

1. Synopsis

New London County, Connecticut is the southwestern-most county in Connecticut at the entrance to the Long Island Sound. The County is comprised of 21 towns and cities with population densities that are roughly half of the state's averages. New London is well-known for the Foxwoods and Mohegan Sun Casinos, the two largest in the United States, as well as Mystic Village, a quaint area featuring a 18th century shopping village and an 19th century coastal seaport. The most populous city in New London County is Norwich, with a population of 40,493. The County's population is 274,055 people (U.S. Census Bureau, 2010a).

Tourism is not as important to the New London County ocean economy as it is to surrounding counties. According to the National Oceanic and Atmospheric Administration, only 41.4 percent of the ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). 73.3 percent of all ocean recreation and tourism-related businesses in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 489 ocean-related establishments employed 14,779 people (National Ocean Economics Program, 2012).

2. Location

New London County, shown in Exhibit 1, lies in southeast Connecticut approximately 40 miles from Providence, Rhode Island and approximately 100 miles from Boston, Massachusetts (Google, Inc., 2012). It has a land area of 771.66 square miles, with six of its 28 towns being coastal and six more lying along the Thames River (U.S. Census Bureau, 2010a). New London County is bordered by Middlesex County to the west, Washington County, Rhode Island to the east, and the New York County of Suffolk opposite the Long Island Sound to the south.

Exhibit 1. Map of New London County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

New London County is served by two major interstates—Interstate-95 and Interstate-395—that connect the County to cities that include Providence, Boston, and New York (Google, Inc., 2012). Amtrak’s Northeast Regional Line makes several stops within the County, and continues as far north as Boston, and as far south as Virginia Beach, and also stops in the cities of Stamford, Bridgeport, New York, and Washington, D.C (Amtrak, Inc., 2012). The Connecticut Commuter Rail’s Shore Line East route begins as far east as the city of New London, and continues west to New York City. The Groton-New London Airport serves predominantly private charters; Bradley International Airport is approximately an hour’s drive from New London County. Two ferry routes connect New London County to more remote areas: the high-speed Block Island Express Ferry runs only in summer months, and the Cross Sound Ferry to Orient Point, Long Island, runs year-round (American Public Transportation Association, 2012).

3. Demographics

New London County has a year-round population of 274,055 (U.S. Census Bureau, 2010a). The following three tables profile New London County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased modestly over the past decade.

Exhibit 2. Population Profile

	New London	Connecticut
Year-Round Population	274,055	3,574,097
Population Change (2000-2010)	5.78%	4.95%
Median Age (years)	40.5	40.0
Percent Female	50.1%	51.3%
Percent Foreign Born	8.3%	13.2%
<i>Ethnic Profile</i>		
White	82.2%	77.6%
Black/African American	5.8%	10.1%
Asian	4.2%	3.8%
Hispanic/Latino	8.5%	13.4%
American Indian	0.9%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	New London	Connecticut
Unemployment Rate	8.4%	10.5%
Percent Out of Labor Force	31.8%	32.0%
Median Household Income	\$62,349	\$64,032
Percent of Population Below Poverty Line	8.8%	10.1%
<i>Educational Attainment</i>		
High School Diploma	30.8%	28.2%
Bachelor’s Degree	15.7%	20.2%
Graduate/Professional Degree	14.5%	15.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	New London	Connecticut
Population Density (people/sq. mile)	412.2	738.1
Housing Density (structures/sq. mile)	182	307.3
Housing Structures that Are Independent Units	70.9%	75.4
Occupied Units	88.5%	91.3%
Seasonal, Recreation, or Occasional Use	4.8%	2.0%
Median House Value	\$289,000	\$296,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Mohegan Tribe and the Mashantucket Pequot Tribe are two federally-recognized native peoples that have lived in the County since the sixteenth century, and gained federal status in 1994 and 1983, respectively. The Mashantucket Pequot Tribe owns and operates Foxwoods Resort Casino—the world’s largest resort casino—and the Mohegan Tribe owns the Mohegan Sun Casino—the United States’ second largest casino (The Mashantucket Pequot Tribal Nation, 2012; The Mohegan Tribe, 2009).

John Winthrop Jr. founded the first English settlement in New London County in 1646, and its center – the City of New London –became a prominent naval base during the Revolutionary War. In the early decades of the 19th century, New London’s port was also the second busiest whaling port in the country, resulting in an influx of wealth that funded much of the present architecture. The combination of whaling becoming illegal and trade routes shifting to ports in Boston and New York City slowed the growth of the area as a whole. The modern-day New London offers a mix between historic colonial architecture in small towns, and densely-developed modern areas (The 1911 Classic Encyclopedia, 2006).

New London County has several major festivals, with most occurring in the summer months. Sailfest, organized by the New London Downtown Association, attracts over 300,000 people to the weekend-long event in July that celebrates Southeastern Connecticut’s culture and heritage (Downtown New London Association, 2009). The Sea Music Festival at Mystic Seaport is slated to have its 33rd annual event this June. The Festival attracts thousands of people to listen to “classical music traditions of the Golden Age of sail” (Mystic Seaport, 2012). Travel brochures, Chambers of Commerce, and other agencies list other events happening weekly in each of New London’s towns and cities.

5. Coastal Amenities

New London County has a lengthy, sand-beach coastline. The County has over 10 public beaches alongside other private beaches, but has no national parks or refuges, and no protected land (ConnQuest, 2012; U.S Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are approximately five harbors, 30 marinas/boatyards, and five yacht clubs in the County (Connecticut Water Trails Association, 2011).

Parts of the New London coast are industrial, whereas the more visited areas are remote, small-town areas. Not far from the industrial activity at the entrance to the Thames River, Mystic Country allows tourists to “step back into the 1700s.” The Olde Mistick Village is an 18th century shopping village with over 60 quaint shoppes built in a typical colonial New England fashion. Similarly, the Mystic Seaport houses the nation’s leading maritime museum—The Museum of America and the Sea—allowing visitors to walk through historic tall ships (Olde Mistick Village, 2012). The U.S.S. Nautilus Museum in Groton

houses the world's first nuclear-powered submarine (Submarine Force Library and Museum Association, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 5,878 business establishments in New London County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County are: Dominion Millstone Power Station, Foxwoods Resort Casino, and the Lawrence & Memorial Hospital (Connecticut Department of Labor, 2012). According to the 2010 Census, approximately 73.3 percent of businesses in New London County are small (U.S. Census Bureau, 2009).²

7. Coastal Tourism/Recreation Activity

New London's beaches are sheltered by the Long Island peninsula, and therefore see more calm conditions than many other beaches. As a result, boating is a popular water sport in New London County—both offshore and along the Thames River—however wave-based activities such as surfing cannot take place. Many beaches in New London County are populous and have amenities such as boardwalks, lockers, cafes and food courts, rides, and playgrounds. There are a few public beaches within New London County that are far more remote and quiet.

The majority of coastal tourism occurs in Mystic Village. The area attracts more history enthusiasts and those seeking a quiet, colonial village experience than it does beach-goers. The coast along the center of New London's shoreline is rather industrial, whereas points to the east and west are less developed and more secluded.

According to National Oceanic and Atmospheric Administration, only 41.4 percent of the ocean-related jobs in New London are related to tourism (National Oceanic and Atmospheric Administration, 2012). Direct tourism expenditures—coastal and otherwise—amounted to \$760,600,000 in 2010 (Carstensen, et. al., 2001). There are 824 establishments dedicated to leisure and hospitality alone in New London County; the average weekly wage for employees of these establishments is \$374. Leisure and hospitality employment in New London County increased by 3,209 jobs, or by 27.4 percent, between the winter and summer of 2010 (U.S. Bureau of Labor Statistics, 2010). These numbers suggest the importance of the summer, tourism, and marine-related tourism economy to New London County.

In 2009, 489 ocean-related establishments in New London County employed 14,779 people. Nine years earlier in 2000, 501 establishments employed 14,214 people. Therefore, between 2000 and 2009, the number of establishments in the County decreased by 2.4 percent, whereas the number of people employed increased by 4.0 percent (National Ocean Economics Program, 2012).

There are 60 hotels (including the two casinos), seven bed and breakfasts, and 16 campgrounds in New London County (U.S. Census Bureau, 2009). 4.8 percent of all houses in New London County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

The U.S. Bureau of Labor Statistics (Exhibit 5) lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry (U.S. Bureau of Labor Statistics, 2010). The employment data in Exhibit 5 further illustrates the increase in employment in summer months for the tourism industry.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. New London County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	7	79	40	100%
Marinas (713930)	174	314	244	-7.6%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	77	115	96	-36.8%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	0	0	0	-100%
Restaurant Employment (7221 & 7222)	4,676	5,415	8,700	20.2%
Amusement, Gambling, Other Recreation (713)	939	1,488	1,175	4.8%
General Tourism				
Travel Agencies (561510)	50	63	57	9.6%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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Kent County, Delaware

1. Synopsis

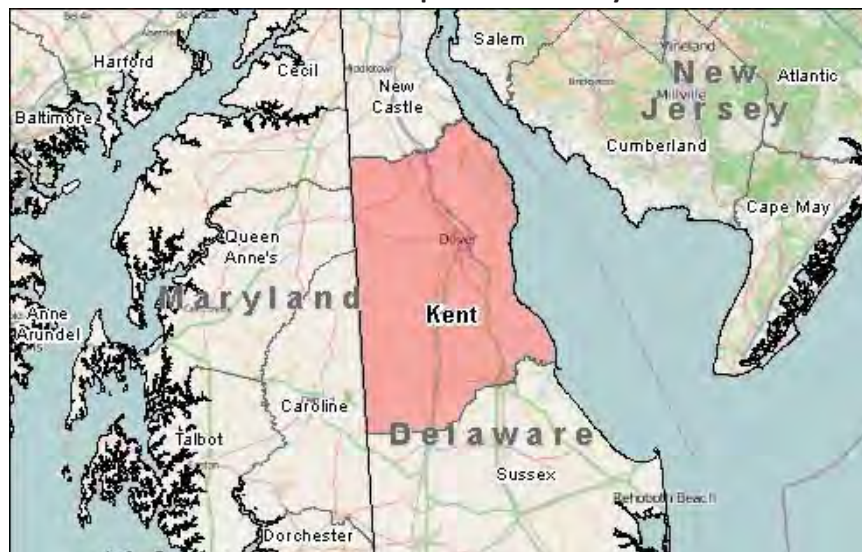
Kent County, Delaware is the southwestern-most county in Delaware at the entrance to the Long Island Sound. The County is comprised of 20 towns and cities with very low population and housing densities. The most populous city is the state's capital, Dover, with a population of 36,047. The County's population is 162,310 people (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, approximately 73 percent of all ocean-related jobs in Kent County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 61 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 148 establishments in the ocean economy employed just over 4,000 people (National Ocean Economics Program, 2012).

2. Location

Kent County, shown in Exhibit 1, lies in central Delaware along Delaware Bay. The County is approximately 100 miles to the east of Washington, D.C. (crossing the Chesapeake Bay), 100 miles southeast of Baltimore, Maryland, and 100 miles south of Philadelphia, Pennsylvania (Google, Inc., 2012). It has a land area of 800.12 square miles, and is bordered by Queen Anne's and Caroline Counties, Maryland to the west, New Castle County to the north, Sussex County to the south, and Cape May and Cumberland Counties, Maryland opposite the Delaware Bay to the east (U.S. Census Bureau, 2010a).

Exhibit 1. Map of Kent County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Kent County is almost exclusively by car. Delaware Route 1 runs the length of the County from North to South (Google, Inc., 2012). The County has several very small airports for small private planes,

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

some of which feature unpaved runways. There are no ferry landings and no passenger rail stations in Kent County (American Public Transportation Association, 2012).

3. Demographics

Kent County has a year-round population of 162,310 (U.S. Census Bureau, 2010a). The following three tables profile Kent County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased greatly over the past decade.

Exhibit 2. Population Profile

	Kent	Delaware
Year-Round Population	162,310	897,934
Population Change (2000-2010)	28.11%	14.59%
Median Age (years)	36.6	38.8
Percent Female	51.9%	51.6%
Percent Foreign Born	5.2%	8.2%
<i>Ethnic Profile</i>		
White	67.8%	68.9%
Black/African American	24%	21.4%
Asian	2%	3.2%
Hispanic/Latino	5.8%	8.2%
American Indian	0.6%	0.5%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Kent	Delaware
Unemployment Rate	10.4%	9.3%
Percent Out of Labor Force	37.7%	36.4%
Median Household Income	\$54,617	\$55,847
Percent of Population Below Poverty Line	11.2%	11.8%
<i>Educational Attainment</i>		
High School Diploma	34.1%	32.7%
Bachelor's Degree	12.5%	16.5%
Graduate/Professional Degree	8.6%	11.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Kent	Delaware
Population Density (people/sq. mile)	276.9	460.8
Housing Density (structures/sq. mile)	111.5	208.3
Housing Structures that Are Independent Units	87.1%	82.3%
Occupied Units	92.3%	80.9%
Seasonal, Recreational, or Occasional Use	0.7%	8.9%
Median House Value	\$207,500	\$242,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Two Native communities exist in Kent County today though neither have federal- or state-recognition. The Lenape Tribe, with large communities in Oklahoma, Wisconsin, and Canada are recognized by the Federal government, though the small self-identified Lenape Indian Tribe community in Cheswold, Delaware is not Federally recognized. Similarly, the present-day Native American communities throughout Kent County believe their ancestors to be the Mitsawockett peoples that once lived in the region that is now Kent County. This second group has increased its size by allowing others to marry into the Tribe. The group does not live on a reservation or have a government; they are integrated with modern-day culture (Lenape Indian Tribe of Delaware, 2010; Mitsawokett, 2012).

English settlers coming from northern colonies began to settle the Kent County area around 1670. William Penn received the land that would become Kent County and on August 24, 1682, the land became part of the Delaware Colony. William Penn built a courthouse in 1697 and built the rest of the town of Dover over the following decades. Dover was named the capitol of Delaware in 1777. Throughout the 18th century, Kent County remained a small grain farming region, and has remained sparsely and remotely populated since (USGenWeb, 2001).

Kent County's maritime history is limited, and therefore cultural attractions within the County are not centered on the marine environment. Well-known and historic attractions in Kent County include the Air Mobility Command Museum and the Dover International Speedway, both of which are in Dover (Air Mobility Command Museum, 2012; Dover Motorsports, Inc., 2012). The City of Dover celebrates its history as the first state capital in the nation each year through the Old Dover Days festival. The festival, which began in 1933, is one weekend in May that includes carnivals, parades, concerts, and exhibits throughout the city of Dover (Kent County & Greater Dover, Delaware Convention and Visitors Bureau, 2012).

5. Coastal Amenities

Kent County has 24 miles of almost entirely undeveloped coastline, with two access points to public beaches (East Coast Beaches USA, 2012). The Bombay Hook National Wildlife Refuge is one of two national wildlife refuges in the state, and accounts for 16,000 acres of protected wetlands and tidal waters (U.S. Fish and Wildlife Service, 2012). There is one marina, but no harbors or yacht clubs in Kent County (Cedar Creek Marina, 2011).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 3,169 business establishments in Kent County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County (including their respective number of employees) in 2010 were: Dover Air Force Base (4,450), Bayhealth-Kent General & Milford Memorial Hospital (2,860), and Dover Downs, Inc. (1,457) (Kent Economic Partnership, 2010).

7. Coastal Tourism/Recreation Activity

Kent County beaches are in remote locations and are relatively un-crowded, and therefore attract beachcombers, sunbathers, and swimmers. Paddleboard, recreational boating, and harbor cruises are common in areas off Kent County due to the calm waters of Delaware Bay. The coastal Bombay Hook National Wildlife Refuge allows for birdwatching and hiking, and offers several nature programs year-round.

According to National Oceanic and Atmospheric Administration, 73 percent of the ocean-related jobs in Kent are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 306

establishments dedicated to leisure and hospitality in the County; the average weekly wage for employees of these establishments is \$349. Leisure and hospitality employment in Kent County increased by 1,000 jobs (14.6 percent) between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). Approximately 61 percent of all ocean, recreation, and tourism establishments in Kent County are small (U.S. Census Bureau, 2009).²

In 2009, 148 ocean-related establishments in Kent County employed 4,006 people. Nine years earlier in 2000, there were only 133 establishments and 3,278 people employed in the sector. Therefore, between 2000 and 2009, the number of establishments in the ocean economy grew by 11.3 percent and the number of people employed grew by 22.2 percent (National Ocean Economics Program, 2012).

There are approximately 35 hotels and bed and breakfasts and 2 campgrounds in Kent County (U.S. Census Bureau, 2009). Less than 1 percent of all houses in Kent County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the amusement, gambling, and recreation industry, followed by the restaurant employment industry (U.S. Bureau of Labor Statistics, 2010).

Exhibit 5. Kent County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	-	-	-	-
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	0	0	0	-100% [#]
Restaurant Employment (7221 & 7222)	2,011	2,219	2,139	2.8
Amusement, Gambling, Other Recreation (713)	1,940	2,598	2,345	0.0
General Tourism				
Travel Agencies (561510)	21	20	25	100% [^]
Tour Operators (561520)	1	1	1	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Figure for hotel employment in 2005 was listed as 400.

[^] Figure for travel agencies in 2005 was listed as 0.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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New Castle County, Delaware

1. Synopsis

New Castle County, Delaware is the first county established in the first state in the country. It is the northern-most county in Delaware, where the Delaware Bay connects to the Delaware River, and is comprised of 15 towns and cities with above-average population and housing densities. The most populous city is the port city of Wilmington, with a population of 70,851. The County's population is 538,479 people (U.S. Census Bureau, 2010a).

The ocean tourism economy in New Castle County represents a sizable portion of the County's ocean economy. According to the National Oceanic and Atmospheric Administration, 84.6 percent of all ocean-related jobs in the County were related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 73.9 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, there were 365 ocean establishments that employed 5,791 people (National Ocean Economics Program, 2012).

2. Location

New Castle County, shown in Exhibit 1, lies at the intersection of Delaware, Maryland, Pennsylvania, and New Jersey. The center of the County is approximately 50 miles from Philadelphia, Pennsylvania, 75 miles to Baltimore, Maryland, and 100 miles from Washington, D.C. (Google, Inc., 2012). It has a land area of 493.51 square miles, and 5 miles of shoreline coastline which are considered to be ocean, the rest lying along the Delaware River (U.S. Census Bureau, 2010a).

Exhibit 1. Map of New Castle County



Source: ESRI, 2011 and OpenStreetMap, 2011.

New Castle County is easily accessible by car as it is located geographically between three major U.S. cities; several interstates run through the northern part of the County (Google, Inc., 2012). New Castle Airport in Wilmington, the largest in the County, is a small airport that is not served by any commercial airlines. Philadelphia International Airport, however, is only 20 miles from Wilmington. The Amtrak rail line that serves the entire northeast corridor stops in Wilmington and Newark; there is no commuter rail. New Castle County has one small non-car ferry—the Three Forts Ferry Crossing—that connects Fort

DuPont (mainland) to Fort Delaware (Pea Patch Island) and Fort Mott (mainland New Jersey); New Castle County has no commuter ferries (American Public Transportation Association, 2012).

3. Demographics

New Castle County has a year-round population of 862,477 (U.S. Census Bureau, 2010a). The following three tables profile New Castle County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased modestly over the past decade.

Exhibit 2. Population Profile

	New Castle	Delaware
Year-Round Population	538,479	897,934
Population Change (2000-2010)	7.64%	14.59%
Median Age (years)	37.2	38.8
Percent Female	51.6%	51.6%
Percent Foreign Born	9.6%	8.2%
<i>Ethnic Profile</i>		
White	65.5%	68.9%
Black/African American	23.7%	21.4%
Asian	4.3%	3.2%
Hispanic/Latino	8.7%	8.2%
American Indian	0.3%	0.5%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	New Castle	Delaware
Unemployment Rate	8.6%	9.3%
Percent Out of Labor Force	33.1%	36.4%
Median Household Income	\$59,959	\$55,847
Percent of Population Below Poverty Line	11.3%	11.8%
<i>Educational Attainment</i>		
High School Diploma	29.6%	32.7%
Bachelor's Degree	19.6%	16.5%
Graduate/Professional Degree	13.5%	11.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	New Castle	Delaware
Population Density (people/sq. mile)	1,263.2	460.8
Housing Density (structures/sq. mile)	510.2	208.3
Housing Structures that Are Independent Units	77.2%	82.3%
Occupied Units	93.2%	80.9%
Seasonal, Recreational, or Occasional Use	0.3%	8.9%
Median House Value	\$252,800	\$242,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Native American Tribe Lenni Lenape existed on the land that would become New Castle County for over 10,000 years. The fertile, river-side lands provided abundant marine life and land vegetation to the people, though disease and colonization pushed them out of the area. There are currently no state- or federally-recognized Native Tribes in the County (New Castle County, 2012).

Land within and around New Castle County was first settled by the Swedes following their 1638 expedition, and disputes between the Swedish and Dutch eventually resulted in the control of the land going to the Dutch West India Company in 1655, with other purchases from the Lenni Lenape Native American Tribe. On December 22, 1663, the Dutch transferred property along the Delaware River to England, and on November 11, 1674, part of this land was officially named New Castle County (New Castle County, 2012).

During and after the Revolutionary War, New Castle's strategic location and milling industries helped the economy flourish. Industrial growth in New Castle County was furthered by the 1837 completion of the Philadelphia, Wilmington & Baltimore Railroad, which connected outsiders to the area's markets. Its strategic location again played an important role during the American Civil War, when Wilmington became the largest ship manufacturer, the second largest gunpowder producer, and the third largest producer of carriages. The growth of suburbs was spurred by the first horsecar line, built in 1864; many wealthy industrialists built mansions in surrounding towns that, for the first time, were accessible to Wilmington. This growth pattern—sparsely populated suburbs surrounding the city of Wilmington—remains evident today in New Castle County (New Castle County, 2012).

New Castle County and Wilmington, Delaware have a strong arts and music community. Two of the larger music festivals in the area are the week-long DuPont Clifford Brown Jazz Festival and the three-day Riverfront Music Festival. Other popular festivals include a Greek and an Italian festival, a Civil War reenactment, and a horserace (Greater Wilmington Convention & Visitors Bureau, 2012a).

5. Coastal Amenities

New Castle's coastline is predominantly river, as only 5 miles of the coast are considered to border the Atlantic Ocean. The County has 2 public beaches, 5 marines and 1 yacht club. There are no national parks or wildlife refuges in the County, and no federally-protected land (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

New Castle County's historical coastal attractions are primarily located in the Wilmington area, though some do exist throughout the County. The Fort Delaware State Park on Pea Patch Island is one of the most popular attractions to the area, and features tours of Confederate prisoners' quarters, ramparts, and gun emplacements. The numerous museums in the region focus on the rich Civil War, colonial, and industrial history of Wilmington and New Castle County (Greater Wilmington Convention & Visitors Bureau, 2012b).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 15,879 business establishments in New Castle County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County (including the number of employees) are: DuPont (9,600), MBNA America Bank, N.A. (8,000), and Christiana Health Care System

(6,500) (New Castle County Chamber of Commerce, 2009). According to the 2009 Census, approximately 73.9 percent of businesses in New Castle County are small (U.S. Census Bureau, 2009).¹

7. Coastal Tourism/Recreation Activity

The New Castle coast runs along the western shore of the Delaware Bay and the tip of the Delaware River. The proximity to the Port of Wilmington, the Port of Philadelphia, and several chemical refineries creates an environment less suitable for activities such as swimming, near-shore boating, and other water-based entertainment. Still, the sand beaches and trails provide ample space for sunbathing and walking.

According to National Oceanic and Atmospheric Administration, 84.6 percent of the ocean-related jobs in New Castle are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 1,322 establishments dedicated to leisure and hospitality alone in New Castle County; the average weekly wage for employees of these establishments is \$383. Leisure and hospitality employment in New Castle County increased by 3,376 jobs, or by only 15.5 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, 365 ocean-related establishments in New Castle County employed 5,791 people. Nine years earlier in 2000, there were only 287 establishments and 5,047 jobs in the ocean sector. Between 2000 and 2009, the number of ocean-related establishments increased by 27.2 percent, and the number of ocean-related jobs increased by 14.7 percent (National Ocean Economics Program, 2012).

There are 57 hotels, one bed and breakfast, and two campgrounds in New Castle County. 0.3 percent of all houses in New Castle County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

The data in Exhibit 5 further illustrates the minor difference between winter and summer employment.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. New Castle County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	67	88	79	-2.5%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	0	0	0	0
Restaurant Employment (7221 & 7222)	15,009	16,397	16,008	4.7%
Amusement, Gambling, Other Recreation (713)	2,932	4,466	3,697	3.3%
General Tourism				
Travel Agencies (561510)	117	125	121	-20.9%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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Rehoboth Beach, Delaware

1. Synopsis

Rehoboth Beach, Delaware is a boardwalk beach town in Sussex County. Rehoboth Beach is a major tourist destination in summer months known for its lively atmosphere with abundant ocean and boardwalk-related activities. The town has come to be unofficially known as the “Nations Summer Capital” due to the high number of summer tourists from Washington, D.C. (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitor’s Center, 2012). Rehoboth Beach is a sparsely populated community with a year-round population of only 1,327 (U.S. Census Bureau, 2010a). According to the U.S. Census Bureau, 73.2 percent of all ocean recreation and tourism establishments are small (U.S. Census Bureau, 2009).¹ Rehoboth Beach is highly dependent on summer tourism.

2. Location

Rehoboth Beach, shown in Exhibit 1, lies in Sussex County along New Jersey’s northern Atlantic coast. The town has a total area of only 1.6 square miles (U.S. Census Bureau, 2010a). Rehoboth Beach is bordered by Henlopen Acres to the north, Dewey Beach to the south, Marshtown to the west, and the Atlantic Ocean to the east.

Exhibit 1. Map of Rehoboth Beach



Source: ESRI, 2011 and OpenStreetMap, 2011.

Rehoboth Beach is only accessible by car. Delaware Route 1, which connects to the northern and southern parts of the state, reaches the “Jersey Shore” in the town of Rehoboth Beach (Google, Inc., 2012). There are no airports, no ferry terminals, and railroads in Rehoboth Beach (American Public Transportation Association, 2012).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

3. Demographics

Rehoboth Beach has a year-round population of 1,327, an 11 percent decrease since 2000 (U.S. Census Bureau, 2010a). The following three tables profile Rehoboth Beach’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Rehoboth Beach has extremely high house values.

Exhibit 2. Population Profile

	Rehoboth Beach	Delaware
Year-Round Population	1,327	897,934
Population Change (2000-2010)	-11.24%	14.6%
Median Age (years)	59.1	38.8
Percent Female	48.4%	51.6%
Percent Foreign Born	7.3%	8.2%
<i>Ethnic Profile</i>		
White	97.3%	68.9%
Black/African American	1.1%	21.4%
Asian	0.7%	3.2%
Hispanic/Latino	3.6%	8.2%
American Indian	0.2%	0.5%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Rehoboth Beach	Delaware
Unemployment Rate	2.9%	9.3%
Percent Out of Labor Force	49.7%	36.4%
Median Household Income	\$66,250	\$55,847
Percent of Population Below Poverty Line	5.8%	11.8%
<i>Educational Attainment</i>		
High School Diploma	13.2%	32.7%
Bachelor’s Degree	32.5%	16.5%
Graduate/Professional Degree	31.6%	11.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Rehoboth Beach	Delaware
Population Density (people/sq. mile)	829.4	460.8
Housing Density (structures/sq. mile)	211.9	208.3
Housing Structures that Are Independent Units	57.8%	82.3%
Occupied Units	23.6%	80.9%
Properties for Seasonal, Rec. or Occasional Use	59.8%	8.9%
Median House Value	\$879,300	\$242,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

At the arrival of European colonists in the 17th century, the Lenape Native American Tribe of the Algonquin Nation lived in the present-day Rehoboth Beach. However, the population diminished as a result of war and disease, and additional pressure from European colonists pushed the Lenape north. No Lenape currently exist in Delaware (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012; Sussex County, Delaware, 2012).

Rehoboth Beach came to wealth in the mid-1600's when it was set up as an early whaling colony by Dutch explorers. Early settlers were also farmers, and part of the original William Penn colony. As whaling died out, the town remained a prominent fishing and farming community. Rehoboth's boardwalk was first built in 1873, and the combination of improved railroads and highways increased the number of tourists arriving each year. By mid 20th century, Rehoboth Beach became known as the "Nation's Summer Capital" for its large number of tourists arriving from Washington, D.C. (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012)

Rehoboth Beach's festivals are largely unrelated to the maritime environment. There are several small festivals, concerts, and exhibits throughout the year, but some of the more visited festivals include the Rehoboth Beach Chocolate Festival, the Rehoboth Beach Independent Film Festival, and the Sea Witch Halloween Festival. Though not related to maritime activity, these events attract beach-going tourists to the area (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012; Rehoboth.com, Inc., 2012).

5. Coastal Amenities

Rehoboth Beach is a 1.5-mile stretch of boardwalk beach along New Jersey's northern Atlantic shore. The beach is very populated and lined with several shops, amusement rides, restaurants, and bars. The town is comprised of only the one, 1.5-mile beach, and has no harbors, but two marinas and one yacht club (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012). There are no national parks, no national wildlife refuges, and no federally-protected land in the town (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Historical points of interest in Rehoboth Beach include the Indian River Lifesaving Station Museum, the Rehoboth Art League, and the Rehoboth Beach Museum. The Lifesaving Museum was built in 1879 and functioned as a U.S. Coast Guard watch station for potentially sinking ships; it has since been turned into a very popular museum. The Rehoboth Art League, just minutes from the downtown boardwalk area, is a collection of colonial buildings and beautiful gardens. The Rehoboth Beach Museum, located on the boardwalk, chronicles the history – predominantly the history in tourism – of Rehoboth Beach (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012)

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 904 business establishments in Rehoboth Beach in 2010 (U.S. Bureau of Labor Statistics, 2010). In 2010, Rehoboth Beach had a very low unemployment rate – roughly a third of that of the state of Delaware – but almost 50 percent of its population was out of the labor force (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

Rehoboth Beach is most well known for the mile-long boardwalk along its 1.5-mile beach. The often-crowded sandy beaches are ideal for sunbathing and swimming, whereas the boardwalk encourages walking, shopping, dining, and gaming on the various amusement rides. A search for activities on the

website for the Rehoboth Beach Chamber of Commerce yield the following groups of places and activities: baseball fields, basketball courts, biking rentals and locations, boat rentals and ramp locations, canoeing, clamming, dolphin watching, fishing, go-karts, golf, parasailing, parks, playgrounds, skateboarding, skimboarding, surfing, tennis, theatres, tours & trails, windsurfing, and waterslides. Based on such a diverse list, Rehoboth Beach is a very active area with numerous options for all types of recreation (Rehoboth Beach-Dewey Beach Chamber of Commerce & Visitors Center, 2012).

There are 232 establishments dedicated to leisure and hospitality alone in Rehoboth Beach. Of these, 24 are hotels and bed and breakfasts, but none are campgrounds (U.S. Bureau of Labor Statistics, 2010). According to the U.S. Census Bureau, 73.2 percent of all ocean recreation and tourism establishments are small (U.S. Census Bureau, 2009).²

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² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Sussex County, Delaware

1. Synopsis

Sussex County, Delaware is the southern-most county in Delaware with coastline along the Atlantic Ocean as well as the Delaware Bay. The county is well-known for both its remote beaches and its two destination boardwalk beaches, Rehoboth Beach and Bethany Beach. Sussex has 25 towns, all with low population and housing densities. The most populous city is Seaford, with a population of 6,928. The County's population is 197,145 people (U.S. Census Bureau, 2010a).

Tourism represents a major portion of Sussex County's ocean economy. According to the National Oceanic and Atmospheric Administration, approximately 96 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 76 percent of all ocean recreation and tourism establishments are small (U.S. Census Bureau, 2009).¹ In 2009, 385 ocean-related establishments in Sussex County employed 5,803 people (National Ocean Economics Program, 2012).

2. Location

Sussex County, shown in Exhibit 1, sits at the entrance to the Delaware Bay and Delaware River. It is the most remote of the three Delaware Counties, as it is approximately 100 miles from Baltimore, Maryland, 110 miles from Washington D.C., and 120 miles from Philadelphia, Pennsylvania. It has a land area of 1,195.65 square miles (U.S. Census Bureau, 2010a). Sussex County is bordered to the north by Kent County, to the west and south by the state of Maryland, to the northeast by the Delaware Bay, and to the east by the Atlantic Ocean.

Exhibit 1. Map of Sussex County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Sussex County is predominantly by car, via Delaware Routes 1, 13, and 113 that run north to south (Google, Inc., 2012). The few airports in the County service only private flights and do not offer commercial service. Similarly, no passenger rail runs through or stops in Sussex County. Sussex County

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

has two ferry terminals, though only one with a tourist focus. The Cape May-Lewes Ferry is a car/passenger ferry operated on a year-round basis by the Delaware River and Bay Authority; the ferry connects Lewes to Cape May, New Jersey across the Delaware Bay. The Woodland Ferry in Seaford is a short crossing over the narrow Nanticoke River (American Public Transportation Administration, 2012).

3. Demographics

Sussex County has a year-round population of 197,145 (U.S. Census Bureau, 2010a). The following three tables profile Sussex County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased faster than the rest of the state over the past decade. The average age in Sussex County is nearly seven years older than the state’s average, and a larger portion of the population is out of the labor force; this suggests that Sussex County may be a retirement community to many.

Exhibit 2. Population Profile

	Sussex	Delaware
Year-Round Population	197,145	897,934
Population Change (2000-2010)	25.86%	14.59%
Median Age (years)	45.4	38.8
Percent Female	51.2%	51.6%
Percent Foreign Born	6.8%	8.2%
<i>Ethnic Profile</i>		
White	79%	68.9%
Black/African American	12.7%	21.4%
Asian	1.0%	3.2%
Hispanic/Latino	8.6%	8.2%
American Indian	0.8%	0.5%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Sussex	Delaware
Unemployment Rate	10.5%	9.3%
Percent Out of Labor Force	44.1%	36.4%
Median Household Income	\$49,006	\$55,847
Percent of Population Below Poverty Line	13.8%	11.8%
<i>Educational Attainment</i>		
High School Diploma	39.3%	32.7%
Bachelor’s Degree	11.7%	16.5%
Graduate/Professional Degree	7.6%	11.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Sussex	Delaware
Population Density (people/sq. mile)	210.6	460.8
Housing Density (structures/sq. mile)	131.4	208.3
Housing Structures that Are Independent Units	89.2%	82.3%
Occupied Units	64.5%	80.9%
Rental Properties	28.3%	8.9%
Median House Value	\$243,700	\$242,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

At the time of the arrival of European colonists in the 17th century, several Native American Tribes of the Algonquin Nation lived in Sussex County, including the the Lenape, the Sikkonese, the Assateagues, and the Nanticoke. Some of these Tribes were forced north and west, while others were killed by colonists. The Nanticoke Indian Association of Millsboro, Delaware, however, remains to this day and is the only state-recognized peoples in the County (Nanticoke Indian Tribe, 2011; Sussex County, Delaware, 2012b).

Sussex County was the first settlement in Delaware, set up as a whaling colony by Dutch explorers in 1631. Several disputes and small wars occurred in the early 18th century regarding the border of Delaware, Maryland, and Pennsylvania, including the area that is now Sussex County. Finally, William Penn commissioned a team of two men, Charles Mason and Jeremiah Dixon, to survey the borders and eventually create what is now known as the Mason-Dixon Line (Sussex County, Delaware, 2012b).

Many festivals in Sussex County are located in the summer beachside communities of Bethany Beach and Rehoboth Beach, but are not necessarily focused on the maritime environment. Major festivals include the Bethany Beach Jazz Festival, the Rehoboth Beach Chocolate Festival, the Rehoboth Beach Independent Film Festival, and the Sea Witch Halloween Festival. Though not related to maritime activity, these events likely attract beach-going tourists (HomeAway.com, Inc., 2012; Rehoboth.com, Inc.).

5. Coastal Amenities

Sussex County has the entire 25 miles of Atlantic Ocean shoreline in Delaware, much of which is sand beach (Schell Brothers, LLC, 2012). The County has approximately 10 public beaches and several private beaches; the one national wildlife refuge—Prime Hook National Wildlife Refuge—includes 10,000 acres of protected land (U.S. Fish and Wildlife Service, 2012). There are three harbors, 15 marinas/boatyards, and five yacht clubs in the County.

Historical attractions in Sussex County include Native American, War, and maritime-related museums, parks, and monuments. The Nanticoke Indian Museum displays many artifacts dating back as far as 8000 B.C. Fort Miles, included on the National Register of Historic Places, was a U.S. fort built to protect the northern oil refineries and chemical plants from invasion by German U-Boats during World War II. The DiscoverSea Shipwreck Museum is a recent addition with the goal of “recovering and preserving our maritime heritage” (Bethany-Fenwick Area Chamber of Commerce, 2012; DiscoverSea Museum, 2011; Nanticoke Indian Tribe, 2011).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 5,408 business establishments in Sussex County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County are Beebe Medical Center, which

employs over 2,000 people, and Mountaire Farms and Bayhealth Medical Center, which each employ more than 1,000 people (Sussex County Council, 2012a). As recognized as a retirement community, Sussex County has a generally smaller labor force per person than the average county; the County also faces a higher unemployment rate than the state and the nation.

7. Coastal Tourism/Recreation Activity

Sussex County is best known for its two boardwalk beaches, Rehoboth Beach and Bethany Beach, but also offers several other beaches that range from developed to very remote and quiet. Dewey Beach is a popular destination for college students, and is the host of the national skimboarding championships each year. According to the County website, popular activities including swimming, sunbathing, volleyball, sailing, windsurfing, and boating. Alternatively, Fenwick Island and the beaches in Lewes are considered more remote, “unspoiled” locations where popular activities include swimming, beachcombing, kayaking, and sailing (Sussex County, Delaware, 2012a). Tourism brochures claim that some of the best sport fishing on the East Coast takes place in the waters near Lewes.

According to National Oceanic and Atmospheric Administration, 96 percent of the ocean-related jobs in Sussex are related to tourism (National Oceanic and Atmospheric Administration, 2012). The Delaware Economic Development Office concluded that in 2005, tourism accounted for 10,540 direct and indirect jobs and \$709 million of cumulative economic activity (The Gombach Group, 2012). There are 678 establishments dedicated to leisure and hospitality alone in Sussex County; the average weekly wage for employees of these establishments is \$320. Leisure and hospitality employment in Sussex County increased by 6,540 jobs, or by 86.1 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). Approximately 76 percent of all ocean recreation and tourism establishments in Sussex County are small (U.S. Census Bureau, 2009).²

In 2009, 385 ocean-related establishments in Sussex County employed 5,803 people. In 2000, there were only 300 of these establishments, and only 4,548 people were employed in the sector. Between 2000 and 2009, the number of ocean-related establishments increased by 28.3 percent, and the number employed in the sector similarly increased by 27.6 percent (National Ocean Economics Program, 2012).

There are 64 hotels, four bed and breakfasts, and 11 campgrounds in Sussex County (U.S. Census Bureau, 2009). 28.3 percent of all houses in Sussex County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the hotel industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates the importance of the summer season to Sussex County’s economy.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Sussex County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	8	45	21	100% [#]
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	138	168	159	-29.0%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	571	1,162	852	-5.3%
Restaurant Employment (7221 & 7222)	6,244	11,104	8,250	11.0
Amusement, Gambling, Other Recreation (713)	0	0	0	0
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Figure in 2005 for Scenic and Sightseeing Transportation, Water was listed as 0.

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Camden County, Georgia

1. Synopsis

One of Georgia's original counties, Camden County is located in the far southeast of the state. The County is best known for its history, moderate climate, Southern hospitality, and undeveloped landscapes. Cumberland Island, one of Georgia's barrier islands, provides 17 miles of nearly undeveloped beach (Jackson, 2012). Camden County is comprised of three incorporated cities and various other small communities and has a population of about 50,000 people (Camden County, 2012; U.S. Census Bureau, 2010). The presence of the U.S. military base at Kings Bay has a critical impact on the economy of Camden County. The Naval Submarine Base Kings Bay is the largest employer in Camden County; employment associated with the base has made Camden County one of the fastest growing counties in the state (Camden County Board of County Commissioners, 2012; Camden County, 2012).

Tourism represents a significant portion of the ocean economy in Camden. According to the National Oceanic and Atmospheric Administration, an estimated 87.6 percent of the ocean-related jobs in Camden are related to tourism (National Oceanic and Atmospheric Administration, 2012). The majority of these businesses are small: according to the U.S. Census Bureau, approximately 60 percent of ocean recreation and tourism-related businesses in Camden County are small (U.S. Census Bureau, 2009)¹. In 2009, 68 ocean-related establishments directly employed 621 people (National Ocean Economics Program, 2012).

2. Location

Camden County, shown in Exhibit 1, is located in the Southeast corner of the state, adjacent to Glynn County (to the north), Charlton County (to the southwest), and Brantley County (to the northwest) in Georgia and Nassau County, Florida (to the south) (Google, Inc., 2012). Camden County has a land area of 689 square miles (Camden County, 2012). Cumberland Island National Seashore forms the eastern coast of Camden County, with 17 miles of shoreline (Jackson, 2012).

Exhibit 1. Map of Camden County



¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Source: ESRI, 2011 and OpenStreetMap, 2011.

Several major highways cross Camden County, including Interstate 95, U.S. Highway 17, and three Georgia State Routes. Boat, rail, and plane infrastructure also exists (Google, Inc., 2012). There is no road access to Cumberland Island. Visitors reach the island by ferry or plane (Camden County, 2012).

3. Demographics

Camden County has a year-round population of 50,513 (U.S. Census Bureau, 2010). The following three tables profile Camden County's population. As Exhibit 2 shows, the population has grown by 15.7 percent in the past decade, which generally mirrors the state population growth over the same time period.

Exhibit 2. Population Profile

	Camden	Georgia
Year-Round Population	50,513	8,186,453
Population Change (2000-2010)	15.7%	18.3%
Median Age (Years)	31.3	35.2
Percent Female	49.4%	51.2%
Percent Foreign Born	2.3%	9.6%
<i>Ethnic Profile</i>		
White	74.4%	59.7%
Black/African American	19.4%	30.5%
Asian	1.4%	3.2%
Hispanic/Latino	5.1%	8.8%
American Indian	0.5%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Camden	Georgia
Unemployment Rate	9.5%	8.8%
Percent Out of Labor Force	31.8%	34.5%
Median Household Income	\$49,230	\$49,347
Percent of Pop. Below Poverty Line	15.3%	15.7%
<i>Educational Attainment</i>		
High School Diploma	33.4%	29.2%
Bachelor's Degree	12.1%	17.6%
Graduate/Professional Degree	8.3%	9.8%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Camden	Georgia
Population Density (people/sq. mile)	82.4	168.4
Housing Density (structures/sq. mile)	34.4	71.1
Housing Structures that are Independent Units	62.8%	66.1%
Occupied Units	85.5%	87.7%
Properties for Seasonal, Rec. or Occasional Use	2.9%	2.0%
Median House Value	\$161,900	\$162,400

4. Historical Context of the Economic Traditions

Camden County was founded on February 5, 1777 when the Georgia Constitution combined two colonial parishes with lands from the Muscogee tribe (ceded by the British in the American Revolution). The County was named after the earl of Camden, Charles Pratt, who supported the American colonies before the Revolution (Kissinger, 2012). Camden County was once home to several tribes, including the Creek Indians. The tribes and early settlers engaged in trade of deerskins and other items. However, when the deerskin trade declined, the Creeks experienced mounting pressure to sign over their land or convert to ranching and farming. The tension grew until the Creeks ceded, or were dispossessed of their land, and moved away from the area in the early 1800s (Saunt, 2002).

Through much of the 1800s, Camden County was home to thriving plantations that grew rice, cotton, corn, and other agricultural crops.

Following the Civil War, Camden County suffered from the loss of its plantation economy. Although parts of Camden County were abandoned, the County also welcomed new residents. A community of Shakers settled on an old plantation and Thomas Carnegie, of Carnegie Steel, purchased 90 percent of Cumberland Island and employed over 300 people to build an estate.

The timber and turpentine industry revived Camden County in the 1890s and later evolved to paper manufacturing in the mid-1900s. Camden County became a leading pulpwood producer and developed about 72 percent of its land as commercial forests.

Camden County's economy was also greatly impacted by the construction of Kings Bay Naval Submarine Base in 1978. As of 2012, U.S. military operations in the County employed almost 9,000 people. In response to the improved economy, the population of Camden grew, encouraging the College of Coastal Georgia to build a satellite campus in the County (Kissinger, 2012).

Several of the cities and towns in Camden County host local festivals. These include: the Crawfish Festival in Woodbine, the Rock Shrimp Festival in St. Marys, and the Kingsland Labor Day Catfish Festival, which attracts over 65,000 people over three days (Camden Happenings, 2012).

5. Coastal Amenities

On the eastern side of Camden County is Cumberland Island. This barrier island is known for its varied ecosystems, including forests, tidal creeks, salt marshes, and over 17 miles of beach (Jackson, 2012). Small portions of the island are privately owned, but over 9,800 acres of the island have been acquired by the U.S. National Park Service, preserved as part of the Cumberland Island National Seashore (U.S. National Park Service, 2012a). There are two marinas and two yacht clubs in the Camden County (U.S. Census Bureau, 2009).

Historically significant coastal attractions include: the ruins of the Carnegie estate—Dungeness—and the First African Baptist Church (U.S. National Park Service, 2012c).

6. General Economic Situation

The U.S. Census Bureau lists 844 business establishments in Camden County in 2009 (U.S. Census Bureau, 2009). The six largest employers in the County are: Naval Submarine Base (NSB) Kings Bay, Camden County Schools, Express Scripts, Lockheed Martin Space Systems, Southeast Georgia Health

System-Camden, and Camden County Government. The Naval Submarine Base (NSB) Kings Bay employs almost 9,000 people and the Camden County Schools employ about 1,200 (Camden County Board of County Commissioners, 2012). Due to employment associated with NSB Kings Bay, Camden County is one of the fastest growing counties in the State of Georgia (Camden County, 2012).

7. Coastal Tourism/Recreation Activity

Camden County provides many options for coastal recreation, including fishing, boating, camping, wildlife viewing, biking, hiking, and swimming. Charter boating is available off the coast. Because most of Cumberland Island is managed by the U.S. National Park Service, the island is largely undeveloped; there is no road access from the mainland. Many threatened and endangered species live on the island and visitors can observe a large variety of wildlife, including armadillos, wild horses, bobcats, dolphins, and lizards. Swimming is allowed anywhere in the park (U.S. National Park Service, 2012b; St. Marys Convention & Visitors Bureau, 2012). Because the U.S. National Park Service only allows 300 people on the island at a time, the beaches are never crowded (Jackson, 2012).

According to National Oceanic and Atmospheric Administration, an estimated 87.6 percent of the ocean-related jobs in Camden are related to tourism (National Oceanic and Atmospheric Administration, 2012). However, tourism in Camden County accounts for only about 3.4 percent of the total employment in the County. In 2008, direct tourist spending amounted to \$78.95 million and generated 830 jobs (U.S. Travel Association, 2009). Leisure and hospitality employment in Camden is steady throughout the year, increasing by only 0.71 percent from winter to summer. This is compared to a 10 percent increase in neighboring Glynn County. There are 120 establishments dedicated to leisure and hospitality in Camden County and the average weekly wage for employees of these establishments is \$272 (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, approximately 60 percent of ocean recreation and tourism-related businesses in Camden County are small (U.S. Census Bureau, 2009).²

In 2009, 68 establishments in the ocean economy directly employed 621 people in Camden. This reflects an increase from 2000, when 39 such establishments employed 513 people. These changes represent growth rates of 74.4 percent and 21.1 percent for establishments and employment in the ocean economy, respectively, between 2000 and 2009 (National Ocean Economics Program, 2012).

There are about 23 hotels and three bed and breakfasts in Camden County that generate nearly \$600,000 in room occupancy tax revenue (U.S. Census Bureau, 2009; Georgia Institute of Technology, 2005). There are two established campgrounds on Cumberland Island (U.S. National Park Service, 2012b). Almost three (2.9) percent of all housing units in Camden County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010). As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and recreation industry. By contrast, the hotel industry and the amusement, gambling, and recreation industry are considered to be focused on tourism-related activities, although local populations also support them.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Camden County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	^
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	0	0	0	^
Renting Pleasure Boats (532292)	0	0	0	^
Land-Based				
Hotel Employment (72111)	305	291	305	3.4%
Restaurant Employment (7221 & 7222)	1347	1360	1357	-4.0%
Amusement, Gambling, Other Recreation (713)	115	130	0	-100.0%
General Tourism				
Travel Agencies (561510)	-	-	-	^
Tour Operators (561520)	-	-	-	^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

^No percent change calculated because either 2010 or 2005 data unavailable.

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Chatham County, Georgia

1. Synopsis

One of the original counties in Georgia, Chatham County is located in the northernmost section of the state's Atlantic coast. The county has a relatively high population density of 622 people per square mile, with a total population of 265,128 (U.S. Census Bureau, 2010). The County's largest city and the State capital is Savannah, which draws tourists for its history, architecture, and creative arts (including filmmaking). Chatham's beaches, like Tybee Island, and opportunities for coastal recreation also draw crowds.

Tourism represents a significant portion of the ocean economy in Chatham. In 2009, 457 ocean-related establishments directly employed 9,661 people (National Ocean Economics Program, 2012). According to National Oceanic and Atmospheric Administration, an estimated 65.8 percent of the ocean-related jobs in Chatham are related to tourism (National Oceanic and Atmospheric Administration, 2012). According to the 2009 U.S. Census County Business Patterns Survey, approximately 45 percent of ocean recreation and tourism-related businesses in Chatham County are small (U.S. Census Bureau, 2009).¹

2. Location

Chatham County, shown in Exhibit 1, is located in the northernmost section of Georgia's Atlantic coast, adjacent to Jasper County (to the northeast), Bryan County (to the west), and Effingham County (to the northwest) (Clayton, 2011; Google, Inc., 2012). Chatham County has a land area of 426 square miles and more than 35 miles of shoreline (Google, Inc., 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Chatham County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Several major highways cross Chatham County, including Interstate 95, Interstate 16, Interstate 516, U.S. Route 80, U.S. Route 17, and five Georgia State Routes (Google, Inc., 2012). A local public transit bus system, called Chatham Area Transit, provides transit services to Savannah and neighboring areas

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

(Chatham Area Transit, 2012). Chatham County also has regional, national, and international travel options. There is bus (Greyhound), rail (Amtrak), boat (Georgia Port Authority), and plane (the Savannah-Hilton Head International Airport) infrastructure throughout the county (City of Savannah, 2012; Tybee Island, Georgia, 2012).

3. Demographics

Chatham County has a year-round population of 265,128 (U.S. Census Bureau, 2010). The following three tables profile Chatham County’s population. As Exhibit 2 shows, the demographic trends in the County generally mirror those of the State. The population of Chatham County has grown by 14.3 percent over the past decade, while the state population has grown by 18.3 percent.

Exhibit 2. Population Profile

	Chatham	Georgia
Year-Round Population	265,128	8,186,453
Population Change (2000-2010)	14.3%	18.3%
Median Age (Years)	34	35.2
Percent Female	51.8%	51.2%
Percent Foreign Born	5.8%	9.6%
<i>Ethnic Profile</i>		
White	52.8%	59.7%
Black/African American	40.1%	30.5%
Asian	2.4%	3.2%
Hispanic/Latino	5.4%	8.8%
American Indian	0.3%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Chatham	Georgia
Unemployment Rate	6.9%	8.8%
Percent Out of Labor Force	37.6%	34.5%
Median Household Income	\$44,928	\$49,347
Percent of Pop. Below Poverty Line	16.6%	15.7%
<i>Educational Attainment</i>		
High School Diploma	29.7%	29.2%
Bachelor's Degree	18.8%	17.6%
Graduate/Professional Degree	10.1%	9.8%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Chatham	Georgia
Population Density (people/sq. mile)	621.7	168.4
Housing Density (structures/sq. mile)	279.8	71.1
Housing Structures that are Independent Units	62.2%	66.1%
Occupied Units	86.4%	87.7%
Properties for Seasonal, Rec. or Occasional Use	2.4%	2.0%
Median House Value	\$177,100	\$162,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Chatham County was founded on February 5, 1777 when the Georgia Constitution combined the Christ Church and St. Philip parishes. The County was named after the earl of Chatham, William Pitt the Elder (Clayton, 2011).

Chatham County includes the site where British General James Oglethorpe landed in 1733 and was met by the Yamacraw tribe, then living in the area around present-day Savannah. Oglethorpe founded Savannah, the first planned city in the United States. Through the 1700s, the Creek and Cherokee tribes ceded land to the settlers (Georgia History, 2006; Savannah Area Chamber of Commerce, 2011b).

Beginning in the mid-1700s, Chatham County served as a through-point for the slave trade; it also served as a port for importing trade goods, such as cotton and naval provisions. The port in Savannah, in particular, was crucial for the British when they defended Chatham County during the American Revolution and for the Confederacy during the Civil War. At the end of the Civil War, General William Sherman occupied Chatham County when he finished his infamous march to the sea.

Chatham also developed a diversified set of industries, including cotton farming, paper manufacturing, ironworks, and turpentine production. Chatham County continues to be an important transportation and industrial center. Large companies, including International Paper and Kerr-McGee, are established in the region (Clayton, 2011; Savannah Area Chamber of Commerce, 2011b).

The tourism industry began to develop in the mid-1900s, when the Historic Savannah Foundation advocated to preserve the historic structures in Savannah. The preservation efforts were aided when the Savannah College of Art and Design occupied and renovated many historic buildings. The City became a popular setting for books and movies, which further encouraged the flow of visitors. More than 6.15 million people visited Savannah in 2008 and spent almost \$2 billion (Savannah Area Chamber of Commerce, 2011a).

Chatham County is also known for several festivals. These include: Mardi Gras Tybee; the Tybee Island Pirate Fest; the Tybee Island Beach Bum Parade; the Savannah Film Festival; the Savannah Jazz Festival; and the St. Patrick's Day parade in Savannah, which is the second-largest parade in the United States (Chatham County, 2012; Mardi Gras Tybee, 2012; Tybee Island, Georgia, 2012).

5. Coastal Amenities

Chatham County has shoreline along the Atlantic Ocean, three sounds, and a network of rivers. The county has 14 beaches, 10 marinas, and 10 yacht clubs (U.S. Census Bureau, 2009). There is one state park, one national park, and two national wildlife refuges in the county. The refuges include 16,053 acres of land (6,000 acres in the Savannah National Wildlife Refuge and 10,053 in the Wassaw National Wildlife Refuge) (Burke and Burke, 2008; U.S. National Park Service, 2012; U.S. Fish and Wildlife Service, 2012).

Historically significant coastal attractions include: the 1773 Tybee Lighthouse, Port of Savannah, Fort Pulaski National Monument, and Fort Screven (site of troop training during the Spanish-American War, World War I, and World War II) (Burke and Burke, 2008; Tybee Island, Georgia, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 7,058 business establishments in Chatham County in 2009 (U.S. Census Bureau, 2009). The five largest employers in the county are: Gulfstream Aerospace Corporation, Candler Hospital, Inc., Memorial Health University Medical, Savannah College of Art & Design, and Wal-Mart Associates, Inc. (Georgia Department of Community Affairs, 2006; Georgia Department of Labor, 2012).

7. Coastal Tourism/Recreation Activity

Rated one of the “best beaches for families” by Parents Magazine, Chatham County’s Tybee Island provides five miles of public beach for walking, biking, fishing, kayaking, surfing, swimming, and watching wildlife. Charter boats are available for deep-sea fishing and dolphin tours. Chatham County also has a Marine Science Center and several national landmarks, including the Fort Pulaski National Monument and the Tybee Island Lighthouse and Museum (Tybee Island, Georgia, 2012).

According to National Oceanic and Atmospheric Administration, an estimated 65.8 percent of the ocean-related jobs in Chatham are related to tourism (National Oceanic and Atmospheric Administration, 2012). Domestic travel in Chatham County accounted for about \$1.07 billion in direct spending and \$280 million in payroll in 2010. This supported 11,180 jobs (U.S. Travel Association, 2011). Data from the U.S. Bureau of Labor Statistics indicate that leisure and hospitality employment in Chatham varies seasonally, increasing by 9.0 percent from winter to summer. There are 923 establishments dedicated to leisure and hospitality in Chatham County and the average weekly wage for employees of these establishments is \$323 (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, approximately 45 percent of ocean recreation and tourism-related businesses in Chatham County are small (U.S. Census Bureau, 2009).²

In 2009, 457 establishments in the ocean economy directly employed 9,661 people in Chatham. This reflects a decrease from 2000, when 635 such establishments employed 15,153 people. The number of establishments and employment in the ocean economy decreased by 28.0 percent and 36.2 percent, respectively, between 2000 and 2009 (National Ocean Economics Program, 2012).

There are about 140 hotels and 13 bed and breakfasts in Chatham County that generated about \$14.6 million in room occupancy tax revenue in 2009 (Georgia Department of Community Affairs, 2010; U.S. Census Bureau, 2009). Chatham County has 10 campgrounds and slightly over two (2.4) percent of all housing units in Chatham County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2009; U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the county as the restaurant industry, followed by the hotel industry and the amusement, gambling, and recreation industry. The amusement, gambling, and recreation industry has developed significantly in the past five years, with employment increasing by 10.3 percent. It should be noted that the restaurant industry serves local populations in addition to the tourism industry. By contrast, the hotel industry and the amusement, gambling, and recreation industry are considered to be focused on tourism-related activities, although local populations also support them. Travel agencies and tour operators are also a notable presence in Chatham County.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Chatham County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	143	0	0%
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	46	0	0	0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	3,081	3,452	3,261	2.6%
Restaurant Employment (7221 & 7222)	11,541	12,335	12,116	4.1%
Amusement, Gambling, Other Recreation (713)	1,172	1,383	1,297	10.3%
General Tourism				
Travel Agencies (561510)	54	55	56	-**
Tour Operators (561520)	61	59	57	-12.3%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	163	0	0%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

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Cumberland County, Maine

1. Synopsis

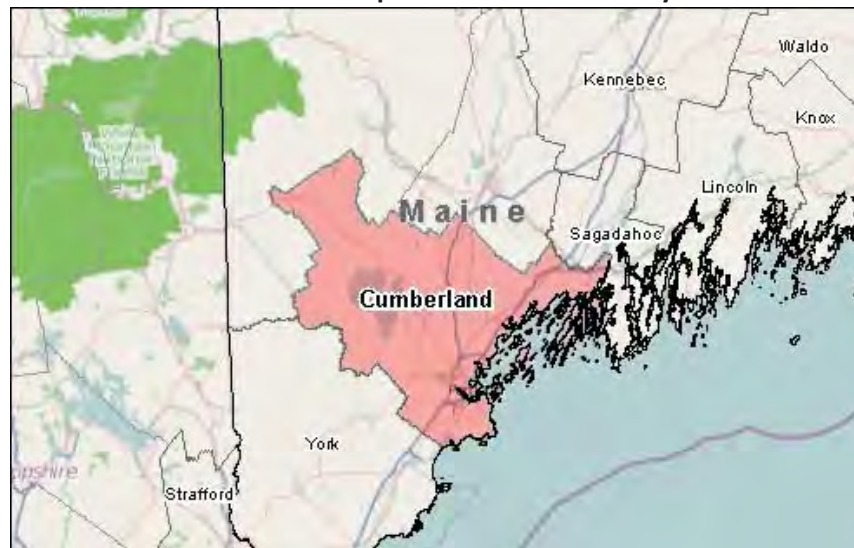
Cumberland County, Maine is in southern Maine, and much of its coastline sits within Casco Bay. The County is comprised of 28 towns and cities with denser population and housing landscapes compared to the state average, although still lower than the average densities along the east coast. Though the majority of Cumberland County's coastline is rocky and wooded, there are a few remote sand beaches, and the County has one large, active beach that is a major tourist attraction. The most populous city is Portland, which is also the largest in Maine, and has a population of 66,194. The County's population is 281,674 people (U.S. Census Bureau, 2010a).

Tourism is an important percentage of the ocean economy in Cumberland County. According to the National Oceanic and Atmospheric Administration, 89.2 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). 73.3 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 803 ocean-related establishments that directly employed 11,469 people in Cumberland County (National Ocean Economics Program, 2012).

2. Location

Cumberland County, shown in Exhibit 1, lies in southern Maine, approximately 75 miles from the Massachusetts border and just over 100 miles from Boston, Massachusetts (Google, Inc., 2012). It has a land area of 1,216.9 square miles, and 12 of its 28 towns lie along its coast. Cumberland County is bordered by York County to the south, Androscoggin and Sagadahoc Counties to the north, Oxford County to the west, and the Atlantic Ocean to the east.

Exhibit 1. Map of Cumberland County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Access to Cumberland County is predominantly by car. Interstates-95 and 295 connect Cumberland County to points north in Maine as well as points south, through Boston and down the east coast. U.S. Route 1 runs along the entire coast of Maine (Google, Inc., 2012). Portland International Jetport is the County's only major commercial airport, and it recently underwent a \$75 million renovation to upgrade one of its terminals to accommodate increased service and passengers (Portland International Jetport, 2010). Amtrak's Downeaster Rail Line runs as far north as Portland down to Boston's North Station, and makes five daily round trips (Amtrak, Inc., 2012). Casco Bay Lines offers year-round ferry service from Portland Harbor to several of the islands off the coast of Cumberland County (American Public Transportation Association, 2012).

3. Demographics

Cumberland County has a year-round population of 281,674 (U.S. Census Bureau, 2010a). The following three tables profile Cumberland County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the County is slightly wealthier and more densely populated than the average county in Maine.

Exhibit 2. Population Profile

	Cumberland	Maine
Year-Round Population	281,674	1,328,361
Population Change (2000-2010)	6.05%	4.19%
Median Age (years)	41.0	42.7
Percent Female	51.5%	51.1%
Percent Foreign Born	5.5%	3.3%
<i>Ethnic Profile</i>		
White	92.8%	95.2%
Black/African American	2.4%	1.2%
Asian	2.0%	1.0%
Hispanic/Latino	1.8%	1.3%
American Indian	0.3%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Cumberland	Maine
Unemployment Rate	6.4%	8.3%
Percent Out of Labor Force	29.8%	35.5%
Median Household Income	\$58,562	\$45,815
Percent of Population Below Poverty Line	10.4%	12.9%
<i>Educational Attainment</i>		
High School Diploma	25.6%	34.4%
Bachelor's Degree	25.3%	17.3%
Graduate/Professional Degree	14.9%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Cumberland	Maine
Population Density (people/sq. mile)	337.2	43.1
Housing Density (structures/sq. mile)	166.0	23.4
Housing Structures that Are Independent Units	73.1%	80.6%
Occupied Units	84.6%	75.5%
Properties for Seasonal, Rec. or Occasional Use	10.6%	16.4
Median House Value	\$248,400	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Abenaki people, an Algonquin speaking nation, inhabited the land prior to the arrival of the British in 1623. As the British settled a decade later, the native populations would slowly be forced out. The Portland area was first permanently settled by British colonists in 1633 as a trading and fishing village (Tolatsga, 1997). Over the next two centuries, the region would grow to become a large industrial, shipping, and trading center for northern areas. In the latter half of the 19th century, after the completion of the Grand Trunk Railway to Montreal, Portland became a hub for Canadian imports and the city economically thrived into the 20th century (The Canadian Encyclopedia, 2012). The area's Victorian architecture, particularly in downtown Portland, is the result of the Great Fire of 1866, when much of the city was burnt down and subsequently rebuilt (eNotes, 2012).

Portland's Old Port Festival kicks off the summer season and has been taking place for over 30 years. The festival features merchandise, some locally-made, food and drink, music, and dancing. The Yarmouth Clam Festival is a celebration of the local community. Locals, Maine residents, and out of state tourists come to the event for the music, races, and of course, the abundance of local Maine seafood. The Sidewalk Art Festival is the largest of its kind in New England, attracting 300 artists and over 40,000 visitors to wander the carless streets of the entire downtown area of Portland (Maine Info, 2012).

5. Coastal Amenities

Cumberland County has 1,289 miles of predominantly rocky coastline. Much of the coastline, included as part of the 1,289 miles, is from the several islands just off-shore of the County. The County has 13 public beaches, but no national parks or nationally-protected land. There is one harbor in the County, as well as 15 marinas/boatyards and three yacht clubs (State of Maine, Department of Conservation, 2006).

Attractions along Cumberland County's coastline focus on the importance of the early maritime trade to the region. The 86-foot tall Portland Observatory was built in 1807 to allow those on shore to identify approaching ships, allowing time to prepare a crew to quickly unload the merchandise. The Observatory is the only remaining historic maritime signal station in the U.S. Within the harbor are also two lighthouses built in that same time period, one that is said to be the "most-photographed lighthouse in Maine (Greater Portland Landmarks, 2012)."

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 10,858 business establishments in Cumberland County in 2010 (U.S. Bureau of Labor Statistics, 2010). As of 2001, the Maine Medical Center was one of ten employers that employed over 1,000 people (Southern Maine Regional Planning Commission, 2001). According to

the 2010 Census, approximately 73.3 percent of ocean recreation and tourism establishments in Cumberland County are small (U.S. Census Bureau, 2010a).²

7. Coastal Tourism/Recreation Activity

The shoreline in Cumberland County is rocky and wooded, but some sand beaches are scattered throughout the area. The majority of the beaches are small, quiet, sandy sections apart from populated areas; almost all are within either Casco or Saco Bay, and therefore have calmer waters. These beaches are therefore ideal for swimming, sunbathing, and beachcombing, given the lack of industrial or residential development. Old Orchard Beach, however, is a seven-mile stretch of white sand beach near shops, restaurants, carnival rides, and other busy attractions. While the surrounding development is not industrial, the beach and surrounding streets are far busier and in a more developed area.

According to National Oceanic and Atmospheric Administration, 89.2 percent of the ocean-related jobs in Cumberland are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 1,140 establishments dedicated to leisure and hospitality alone in Cumberland County; the average weekly wage for employees of these establishments is \$339. Between the winter and summer of 2010, leisure and hospitality employment in Cumberland County increased by 5,344 jobs, or by approximately 35 percent (U.S. Bureau of Labor Statistics, 2010).

In 2009, there were 803 ocean-related establishments in Cumberland County. Together, these establishments employed 11,439 people. In 2000, there were only 675 establishments and 11,231 people directly employed in the ocean economy: between 2000 and 2009, the number of ocean-related establishments increased by 19.0 percent and the number employed by those establishments increased by 2.1 percent.

According to the U.S. Census Bureau, there are 77 hotels, 17 bed and breakfasts, and 45 campgrounds in Cumberland County (U.S. Census Bureau, 2009). Additionally, 10.6 percent of all houses in Cumberland County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, although it should be noted that this industry serves local populations as well (U.S. Bureau of Labor Statistics, 2010).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Cumberland County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	-100% [#]
Marinas (713930)	257	464	377	-1.0%
Boat Building and Repair (336612)	0	125	119	-43.9%
Boat Dealers (441222)	71	120	98	-1.0%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	1,838	2,441	2,113	-7.5%
Restaurant Employment (7221 & 7222)	10,406	12,711	11,472	6.3%
Amusement, Gambling, Other Recreation (713)	1,958	2,749	2,183	-5.7%
General Tourism				
Travel Agencies (561510)	50	46	50	-62.4%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

[#] Figure for Scenic and Sightseeing Transportation, Water in 2005 was listed as 31.

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Hancock County, Maine

1. Synopsis

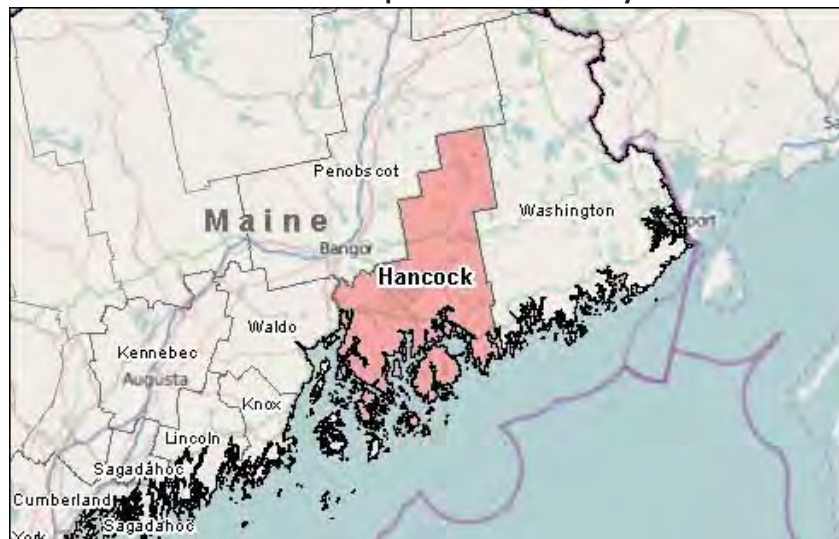
Hancock County, Maine is one of the northernmost counties in Maine. The County is comprised of 38 towns and cities, the largest being Ellsworth with a population of 7,741. Hancock County is known for its extensive 1,100-mile coastline with hundreds of islands, and several peninsulas and bays. The County's population is 54,418 people and is one of the most sparsely populated counties along the east coast (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 78.5 percent of all ocean-related employment in the County is related to tourism (National Oceanic and Atmospheric Administration, 2012). 94.6 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, the 405 ocean-related establishments in Hancock County employed 3,433 people (National Ocean Economics Program, 2012).

2. Location

Hancock County, shown in Exhibit 1, lies close to the U.S.-Canada border in northern Maine. Hancock County is approximately 90 miles from the capital, Augusta, 150 miles from Portland, and 250 miles to Boston, Massachusetts (Google, Inc., 2012). The County has a land area of 2,351 square miles, and 24 of its 38 towns are coastal, of which seven are islands (Hancock County Planning Commission, 2012; U.S. Census Bureau, 2010a). Hancock County is bordered by Washington, Penobscot, and Waldo Counties.

Exhibit 1. Map of Hancock County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Hancock County is most accessible by car. Though no interstate highways run through the County, its western border runs nears both I-95 and I-395. U.S. Route 1 runs along the entire length of Maine's coast, which includes the length of Hancock County (Google, Inc., 2012). The Hancock County-Bar Harbor Airport, the largest in the County, operates commercial flights through U.S. Airways, though only small planes to Logan International Airport in Boston. Ferries from Northeast Harbor run year-round to several destinations in the Cranberry Isles, and there is another ferry route between Isle au Haut and

Stonington, Maine. No ferries extend to Canada or Massachusetts (American Public Transportation Association, 2012).

3. Demographics

Hancock County has a year-round population of 54,418 (U.S. Census Bureau, 2010a). The following three tables profile Hancock County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Hancock County's population has decreased over the last ten years, making it one of the most sparsely populated counties on the east coast.

Exhibit 2. Population Profile

	Hancock	Maine
Year-Round Population	54,418	1,328,361
Population Change (2000-2010)	-0.68%	4.19%
Median Age (years)	46.3	42.7
Percent Female	51%	51.1%
Percent Foreign Born	2.3%	3.3%
<i>Ethnic Profile</i>		
White	96.9%	95.2%
Black/African American	0.4%	1.2%
Asian	0.8%	1.0%
Hispanic/Latino	1.1%	1.3%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Hancock	Maine
Unemployment Rate	7.4%	8.3%
Percent Out of Labor Force	34.5%	35.5%
Median Household Income	\$47,801	\$45,815
Percent of Population Below Poverty Line	12.3%	12.9%
<i>Educational Attainment</i>		
High School Diploma	31.8%	34.4%
Bachelor's Degree	19.5%	17.3%
Graduate/Professional Degree	10.6%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Hancock	Maine
Population Density (people/sq. mile)	34.3	43.1
Housing Density (structures/sq. mile)	25.3	23.4
Housing Structures that Are Independent Units	91.8%	80.6
Occupied Units	60.3%	80.6%
Properties for Seasonal, Rec. or Occasional Use	32.7%	16.4%
Median House Value	\$201,600	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Penobscot people were the original inhabitants of the area that now comprises Hancock County. Though relations with colonists were civil and trade was beneficial to both groups, eventually the Penobscot Tribe was forced to sell off much of its land. Today, the 560-member tribe still inhabits a small reservation in nearby Aroostook County. They are not federally recognized (Greg A. Hartford, 2012; Tolatsga, 1997).

Hancock County has been a long-time tourist destination. In the mid-1800's, artists from the Hudson River School painted the seascapes and landscapes of Bar Harbor and Mount Desert Island. When the paintings made their way to American cities, wealthy residents wanted to see the places in the paintings, and travelled north and boarded with local residents. Tourism increased over time and spurred development of the hotel industry. Eventually, the wealthier population built vacation cottages; today, a mix of cottages and hotels still dot the landscape of the County. Industrial activity has largely remained out of the area to this day (Greg A. Hartford, 2012; Hancock County Government, 2012).

The Winter Harbor Lobster Festival is popular to tourists and residents. The event takes place the second Saturday in August of every year; this coming year (2012) will be the 47th annual event. The Bucksport Bay Festival, approaching its 15th annual event in 2012, is a weekend of parades, food, music, and appearances by the U.S. Navy Frigate and the U.S. Coast Guard Cutter (Maine Info, 2012).

5. Coastal Amenities

The hundreds of islands, bays, and peninsulas make Hancock County's coastline of 1,700 miles the longest in the state (State of Maine, Department of Conservation, 2012). Much of this coastline is rocky and sometimes jagged cliffs unsuitable for recreation; still, the County has approximately 35 public beaches. There are four harbors, 11 marinas, and five yacht clubs in the County (HTL, Inc., 2012). Acadia National Park spans over 47,000 square acres of Mount Desert Island and the surrounding smaller islands nearest to Bar Harbor. There are no national wildlife refuges in the County.

Coastal attractions to Hancock County are predominantly nature-based. Whale watches out of Bar Harbor and nature watching within Acadia National Park—the second most visited park in the United States—are popular warm-weather activities in the County (Maine Resource Guide, 1998). Activities for the more adventurous include biking and hiking through some of the hundreds of trails, rock-climbing the natural cliffs, and canoeing and kayaking within the calm waters of the bay.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 2,129 business establishments in Hancock County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County are Jackson Laboratories, a genetics research laboratory that employs 1,300 people, and International Paper, a paper manufacturer that employing over 1,000 (Down East Resource Conservation & Development, 2009).

7. Coastal Tourism/Recreation Activity

Sand beaches in Hancock County are small and very remote. In general, the more populated areas feature rocky beaches, with some portions inaccessible by land due to the steep or rocky geographic features; still, there are a few sand beaches in locations throughout the County. Hancock County is therefore a sought after destination for nature enthusiasts, including land and sea -based wildlife, especially within the 47,000-acre Acadia National Park. Because of the protection afforded by the hundreds of islands and peninsulas, the waters are generally calmer along the County's shoreline.

According to National Oceanic and Atmospheric Administration, 78.5 percent of the ocean-related jobs in Hancock are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 380 establishments dedicated to leisure and hospitality alone in Hancock County; the average weekly wage for employees of these establishments is \$404. Between the winter and summer seasons in 2010, leisure and hospitality employment in Hancock County increased by 4,243 jobs, or by nearly 254 percent (U.S. Bureau of Labor Statistics, 2010). Approximately 94.6 percent of ocean, recreation and tourism establishments in Hancock County are small (U.S. Census Bureau, 2009).¹

In 2009, the 405 ocean-related establishments in Hancock County directly employed 3,433 people. In 2000, the 394 such establishments directly employed 3,786 people. Between 2000 and 2009, the number of establishments increased by 2.8 percent, but the number employed in the sector decreased by 9.3 percent.

There are approximately 58 hotels, 17 bed and breakfasts, and 45 campgrounds in Hancock County (U.S. Census Bureau, 2009). An additional 32.7 percent of all houses in Hancock County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

The Bureau of Labor Statistics data in Exhibit 5, below, illustrates the extreme fluctuations between winter and summer employment, as well as the declining tourism-related employment figures since 2005.

Exhibit 5. Hancock County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	7	109	49	-3.9%
Marinas (713930)	153	186	161	10.3%
Boat Building and Repair (336612)	354	393	389	100%#
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	0	48	0	0
Land-Based				
Hotel Employment (72111)	245	1,492	832	-8.4%
Restaurant Employment (7221 & 7222)	932	2,897	1,758	-4.6%
Amusement, Gambling, Other Recreation (713)	222	579	341	3.0%
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	0	0	0	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-100%^

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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Knox County, Maine

1. Synopsis

Knox County, Maine lies along Maine’s central coast. The County is comprised of 18 towns and cities, 12 of which are coastal, and four of those being islands. Knox has low population and housing densities, though still higher than the average densities in Maine; the most populous city is Rockland with a population of 7,297. The County’s population is 39,736 people (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 73.8 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). 90.2 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 300 ocean-related establishments in Knox County directly employed 2,342 people (National Ocean Economics Program, 2012).

2. Location

Knox County, shown in Exhibit 1, lies along the Penobscot Bay in central Maine, approximately 180 miles from Boston, Massachusetts and 140 miles to the Canadian border (Google, Inc., 2012). It has a total area of 1,142 square miles (U.S. Census Bureau, 2010a). Knox County is bordered by Lincoln County to the west, Waldo County to the north, and Hancock County to the east, along Penobscot Bay.

Exhibit 1. Map of Knox County



Source: ESRI, 2011 and OpenStreetMap, 2011.

U.S. Route 1, arguably Maine’s most scenic highway, spans the entire coast of Knox County en-route to the Massachusetts border to the south and the Canadian Border to the north. No interstate highways run through the County (Google, Inc., 2012). The Knox County Regional Airport offers charter and commercial flights (commercial flights only to Boston), and is one of the busiest in the state during summer months when tourists visit the summer communities within the County (Knox County Regional Airport, 2012). The nearest international airport is Boston’s Logan International Airport, approximately 180 miles south. Maine State Ferry Service operates lines from Rockland to Vinalhaven, North Haven, and Matinicus Island, and from Lincolnville to Isleboro. Services increase to these destinations in summer months (Maine Department of Transportation, 2010). The Maine Eastern Railroad operates

one route through mid-coast Maine; the Railroad uses restored vintage railcars, and advertises the scenery as opposed to the convenience of travel (Maine Eastern Railroad, 2012). There are no commuter rails or trains that access any major cities.

3. Demographics

Knox County has a year-round population of 39,736 (U.S. Census Bureau, 2010a). The following three tables profile Knox County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has largely remained the same over the past decade.

Exhibit 2. Population Profile

	Knox	Maine
Year-Round Population	39,736	1,328,361
Population Change (2000-2010)	0.3%	4.19%
Median Age (years)	46.2	42.7
Percent Female	50.5%	51.1%
Percent Foreign Born	2.0%	3.3%
<i>Ethnic Profile</i>		
White	97.1%	95.2%
Black/African American	0.5%	1.2%
Asian	0.5%	1.0%
Hispanic/Latino	0.8%	1.3%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Knox	Maine
Unemployment Rate	5.5%	8.3%
Percent Out of Labor Force	36.5%	35.5%
Median Household Income	\$44,439	\$45,815
Percent of Population Below Poverty Line	13.0%	12.9%
<i>Educational Attainment</i>		
High School Diploma	38%	34.4%
Bachelor's Degree	18.7%	17.3%
Graduate/Professional Degree	8.1%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Knox	Maine
Population Density (people/sq. mile)	108.8	43.1
Housing Density (structures/sq. mile)	65.0	23.4
Housing Structures that Are Independent Units	86.7%	80.6%
Occupied Units	72.7%	75.5%
Properties for Seasonal, Rec. or Occasional Use	20.3%	16.4%
Median House Value	\$203,800	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Thousands of years before colonists made their way to Knox County, the area was inhabited by the Penobscot peoples. Although relations were civil and trade was advantageous to both parties between the Penobscot peoples and the colonists, disease and land sales significantly reduced the tribe's population. Today, the Penobscot Indian Nation inhabits a 20-mile reservation in Aroostook County, however, they are not federally-recognized (Tolatsga, 1997).

During the 19th century, Knox County was a leading producer of lime and granite rock, and shipped the goods throughout the United States through the port in Rockland. Most of the other industries were marine-based, including fishing, lobstering, and shipbuilding. Today, the region remains a strong fishing and lobstering community, but has partly shifted toward become a service-based economy, catering to the influx of tourists in recent decades. In the case of Rockland, several boutiques, specialty stores, fine dining, and art galleries have opened within the last 20 years in its downtown waterfront area (Rockland Main Street, Inc., 2012).

Knox County's largest festival is the Maine Lobster Festival in Rockland, which will hold its 65th annual event in August 2012. The festival celebrates Rockland's biggest export, lobster, and attracts participants from all over the world. The festival includes arts, U.S. Navy ship tours, U.S. Coast Guard Station tours, and most importantly, over 20,000 pounds of famous Maine lobster (Maine Lobster Festival, 2012). The Gathering of the Fleet, sponsored by the Maine Windjammer Association each year between June and September. Knox County's fleet of over a dozen 19-century-style windjammers congregate each weekend for ceremonies, tours, parades and races, including the Great Schooner Race, North America's largest annual gathering of tall ships (The Maine Windjammer Association, 2012a).

5. Coastal Amenities

Knox County has over 600 miles of mostly rocky coastline. The County has 10 public beaches, one harbor, five marinas and boatyards, and two yacht clubs (Island Institute, 2012). The two wildlife refuges are the only national parks in the area, and together account for only 77 acres of protected land. Seal Island National Wildlife Refuge accounts for the majority, or 65 acres, and Franklin Island National Wildlife Refuge protects the remaining 12 acres (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Central Maine's impressive windjammer fleet, harbored mostly in Camden, Rockland, and Rockport attracts tourists for tours, excursions, or private charters (The Maine Windjammer Association, 2012b). Knox County's 12 historic lighthouses along the Penobscot Bay and the islands within the Bay are scenic landmarks of the maritime history, and the Maine Lighthouse Museum, the largest of its kind in the County, houses a large collection of Fresnel lighthouse lenses and memorabilia (The 1772 Foundation, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 1,723 business establishments in Knox County in 2010 (U.S. Bureau of Labor Statistics, 2010). Penn Bay Healthcare is the largest employer in the County and employs over 1,500 people (MaineHealth, 2012). In 2010, the County had one of the lowest unemployment rates in the country at 5.5% (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

Coastal tourism to Knox County focuses on the quiet, small town aspect of each town within the County, and much less so on the beaches. With towns lining the rocky shores of the Penobscot Bay, Knox County

is known for its several islands, 12 historic lighthouses, and small protected harbors bustling with fishing and lobster boats. Within and outside the two national wildlife refuges, nature enthusiasts enjoy birds such as osprey, bald eagles, and puffins, and animals including deer, moose, and harbor seals (U.S. National Park Service, 2012). Tourism guides claim that Knox County gives the “authentic Maine experience,” that being of small working harbors in quaint villages, and scenic views of rocky cliffs, historic lighthouses, and wooded hills (Maine Visitors Network, 2012).

In 2009, 300 ocean-related establishments in Knox County directly employed 2,342 people. In 2000, 208 ocean-related establishments in the County directly employed 2,292 people. Whereas the number of ocean-related establishments increased by 44.2 percent between 2000 and 2009, the number of people employed in the sector increased by 2.2 percent only (National Ocean Economics Program, 2012).

According to National Oceanic and Atmospheric Administration, 73.8 percent of the ocean-related jobs in Knox are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 231 establishments dedicated to leisure and hospitality alone in Knox County; the average weekly wage for employees of these establishments is \$370. Between the winter and summer of 2010, leisure and hospitality employment in Knox County increased by 1,398 jobs, or by approximately 95 percent (U.S. Bureau of Labor Statistics, 2010). Approximately 90.2 percent of ocean recreation and tourism establishments in Knox County are small (U.S. Census Bureau, 2009).¹

According to the U.S. Census, there are 24 hotels, 21 bed and breakfasts, and nine campgrounds in Knox County (U.S. Census Bureau, 2009). An additional 20 percent of all houses in Knox County are for seasonal, occupational, or occasional use (U.S. Census Bureau, 2012b).

As shown in Exhibit 5, the Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, which grows by over 700 jobs from winter to summer. The data in Exhibit 5 show the average decline of tourism-related employment over the last five years.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Knox County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	25	119	67	-15.2%
Marinas (713930)	141	177	155	-12.9%
Boat Building and Repair (336612)	223	204	212	-7.4%
Boat Dealers (441222)	32	43	36	100% [#]
Renting Pleasure Boats (532292)	-	-	0	-
Land-Based				
Hotel Employment (72111)	139	464	308	-23.4%
Restaurant Employment (7221 & 7222)	954	1,662	1,253	7.3%
Amusement, Gambling, Other Recreation (713)	203	283	237	-20.2%
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

BLS figure for Boat Dealers in 2005 was listed as 0.

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Lincoln County, Maine

1. Synopsis

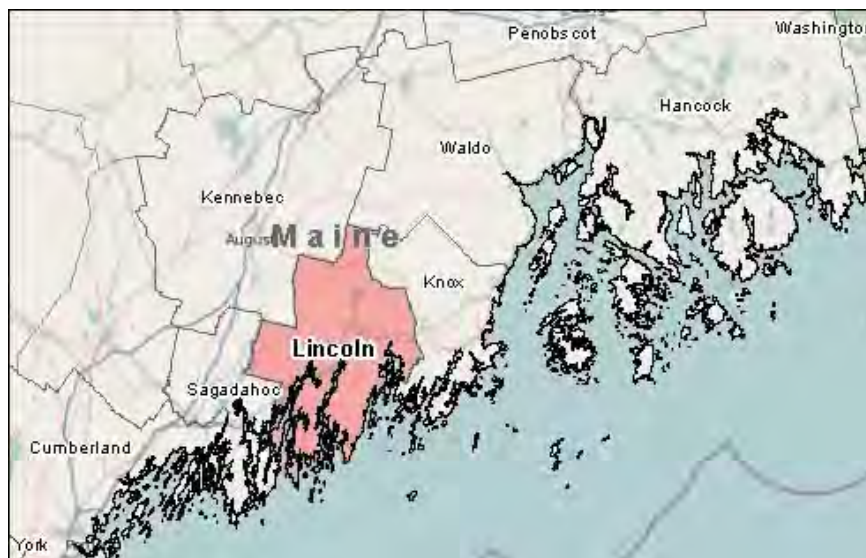
Lincoln County, Maine lies along Maine’s midcoast region. The County’s geography features three large “finger” peninsulas, each extending approximately 20 miles, surrounded by bays, coves, and rocky islands. Lincoln County has 19 towns, of which 16 are located on either the County’s coast or along one of the large bays. Though higher than Maine’s on average, the population and housing densities in Lincoln County are both very low. The most populous town is Waldoboro, with a population of 4,916. The County’s population is 34,457 people (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 73.7 percent of all ocean-related jobs in Lincoln County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Roughly 94 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 286 establishments directly employed 1,707 people (National Ocean Economics Program, 2012).

2. Location

Lincoln County, shown in Exhibit 1, has a total area of 699.8 square miles; nearly half of that area lies in the region known as the “finger peninsulas” (Google, Inc., 2012; U.S. Census Bureau, 2010a). Lincoln County is bordered by Sagadahoc County to the west, Kennebec and Waldo Counties to the north, Knox County to the west, and the Atlantic Ocean to the south.

Exhibit 1. Map of Lincoln County



Source: ESRI, 2011 and OpenStreetMap, 2011.

No major interstates run through Lincoln County. U.S. Route 1 runs north to south at the tip of each of the finger peninsulas, and one Maine State Highway run to the outer most point of each peninsula (Google, Inc., 2012). The Monhegan Boat Line operates a ferry between Port Clyde (Knox County) and Monhegan Island; Hardy Boat Cruises operates a seasonal ferry and seal watch between New Harbor and Monhegan Island. The Lincoln Regional Airport serves private non-commercial flights only. The nearest commercial airport is in Portland, Maine, approximately 60 miles south, and the nearest

international airport is in Boston, Massachusetts, approximately 160 miles south. No passenger railroads service the area (American Public Transportation Association, 2012).

3. Demographics

Lincoln County has a year-round population of 34,457 (U.S. Census Bureau, 2010a). The following three tables profile Lincoln County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Lincoln County's population, housing, and employment figures largely mirror those of the state's, though the County is only slightly older, more densely populated, and wealthier.

Exhibit 2. Population Profile

	Lincoln	Maine
Year-Round Population	34,457	1,328,361
Population Change (2000-2010)	2.5%	4.19%
Median Age (years)	48.1	42.7
Percent Female	51.0%	51.1%
Percent Foreign Born	1.8%	3.3%
<i>Ethnic Profile</i>		
White	97.6%	95.2%
Black/African American	0.3%	1.2%
Asian	0.5%	1.0%
Hispanic/Latino	0.8%	1.3%
American Indian	0.3%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Lincoln	Maine
Unemployment Rate	6.4%	8.3%
Percent Out of Labor Force	38.8%	35.5%
Median Household Income	\$48,315	\$45,815
Percent of Population Below Poverty Line	10.3%	12.9%
<i>Educational Attainment</i>		
High School Diploma	32.0%	34.4%
Bachelor's Degree	19.3%	17.3%
Graduate/Professional Degree	13.4%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Lincoln	Maine
Population Density (people/sq. mile)	75.6	43.1
Housing Density (structures/sq. mile)	51.5	23.4
Housing Structures that Are Independent Units	93.5%	80.6%
Occupied Units	64.5%	75.5%
Properties for Seasonal, Rec. or Occasional Use	28.7%	16.4%
Median House Value	\$206,200	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Penobscot Abenaki Native Americans were the original inhabitants of the area that is now Lincoln County. However, wars with neighboring tribes and English settlements spreading north pushed the tribe progressively northward, and eventually into Quebec, Canada. The Abenaki are no longer present in Lincoln County (Tolatsga, 1997).

Lincoln County was first settled in the mid to late 18th century. In the early years of the County, marine-based activities such as commercial fishing, lobstering, clamming, and eeling supplemented on-shore forestry and agriculture as the area's economic base. By the mid-19th century, the Megunticook River provided much of the power necessary for the areas' factories, which produced goods such as carriages, blinds, and most importantly, ships. In recent decades, nuclear power generation, service industries, and tourism have constituted a larger portion of the economy, though many of the former activities do still occur (Camden Downtown Business Group, 2009; Lincoln County Government, 2011).

The largest festival in the County is the Windjammer Days Festival, scheduled for its 50th annual event in June of 2012. The event is kicked off by a parade of 19th-century-style sailing ships from all over Maine's coast around Boothbay Harbor, and followed by live music and fireworks. The same windjammers participate in similar events in surrounding counties. The Fisherman's Festival in Boothbay, one weekend in April, celebrates the "time long tradition of local fishermen;" the 39th annual event will be held in 2012 (Boothbay Harbor Region Chamber of Commerce, 2012b).

5. Coastal Amenities

Lincoln County's coastline is 451 miles almost entirely covered by rocky and/or wooded terrain (Lincoln County Government, 2011). There are only two public beaches and only a handful of other small private areas along the coast that are sandy. The entire coastal area of Lincoln County is comprised of a series of peninsulas bordered by bays and coves. Only a small portion of the 451-mile coastline therefore has a direct view of the open-ocean. The County has very few marinas, boatyards, yacht clubs, and harbors, despite the several bays and coves within the peninsulas. There are no national parks or wildlife refuges in the County (U.S. National Park Service, 2012; U.S. Fish and Wildlife Service, 2012).

The tourism draw to Maine's midcoast, including Lincoln County, are the remote lighthouses, small harbors filled with lobster boats and fishermen, and the small, harbor-side village atmosphere. While many tourists come only for this "living attraction," many still visit other historic sites such as the two centuries-old forts in Damariscotta and a 28 building historic railway village in Boothbay, as well as more recent additions including the Maine State Aquarium in West Boothbay Harbor (Boothbay Harbor Region Chamber of Commerce, 2012a).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 1,421 business establishments in Lincoln County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in the County, Lincoln County Healthcare, employs approximately 1,200 people (MaineHealth, 2012). In 2010, Lincoln County's unemployment rate was significantly lower than the national average at 6.4% (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

Typical beaches activities (e.g., sunbathing, beachcombing, etc.) are limited to only two beaches in the County. Instead, coastal activities in Lincoln County are off-shore related, such as fishing, boating (including private, charters, or rentals), kayaking, and whale watching. The rocky shores also make for

excellent on-shore fishing and nature watching, including seals and puffins. Trails for biking and hiking are commonplace and a popular draw to tourists.

According to National Oceanic and Atmospheric Administration, 73.7 percent of the ocean-related jobs in Lincoln are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 197 establishments dedicated specifically to leisure and hospitality in Lincoln County; the average weekly wage for employees of these establishments is \$376. Between the winter and summer of 2010, leisure and hospitality employment in Lincoln County increased by 1,946 jobs, or by 242 percent (U.S. Bureau of Labor Statistics, 2010). In 2009, 286 ocean-related establishments directly employed 1,707 people in Lincoln County (National Ocean Economics Program, 2012). Approximately 94 percent of ocean recreation and tourism establishments in Lincoln County are small (U.S. Census Bureau, 2009).¹

According to the 2009 U.S. Census, there are 24 hotels, 20 bed and breakfasts, and six campgrounds in Lincoln County (U.S. Census Bureau, 2009). An additional 28.7 percent of all houses in Lincoln County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 shows a marked decline in tourism-related employment since 2005 in each industry where data were available.

Exhibit 5. Lincoln County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	59	25	-10.7%
Marinas (713930)	64	90	79	-27.5%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	11	14	12	-57.1%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	54	615	290	-10.2%
Restaurant Employment (7221 & 7222)	420	1,084	662	-24.6%
Amusement, Gambling, Other Recreation (713)	83	207	133	-15.8%
General Tourism				
Travel Agencies (561510)	9	0	8	100% [#]
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Travel Agencies in 2005 was listed as 0.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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Sagadahoc County, Maine

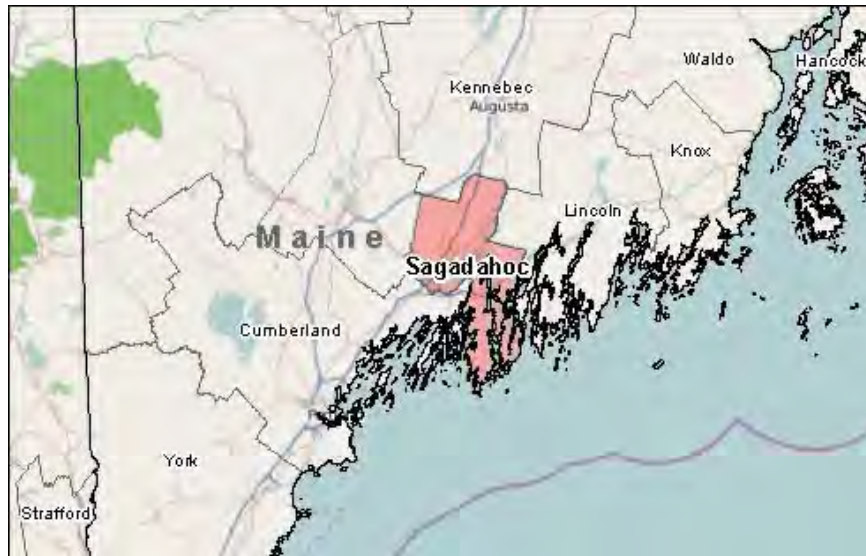
1. Synopsis

Sagadahoc County, Maine lies along the south-central coastline of Maine, just north of Casco Bay. The geographic features of the County are unique in that its coastline is comprised of several “finger peninsulas” that extend approximately 20 miles; between the finger peninsulas are coves, bays, and islands. The County is comprised of 10 towns and cities, the largest being Bath with a population of 8,514 as of the 2010 U.S. Census. The County’s population is 35,293 people (U.S. Census Bureau, 2010a). Roughly 81 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹

2. Location

Sagadahoc County, shown in Exhibit 1, lies just north of Casco Bay, and adjacent to the city of Brunswick (population 20,278) across the Kennebec River. It has a total area of 370.2 square miles, making it the smallest in Maine by that measure (U.S. Census Bureau, 2010a). Sagadahoc County is bordered by Cumberland (including the cities of Brunswick and Portland) and Androscoggin Counties to the west, Kennebec County to the north, Lincoln County to the west, and Casco Bay to the south.

Exhibit 1. Map of Sagadahoc County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Interstate 295 runs through the western interior of Sagadahoc County, U.S. Route 1 runs along the interior of the bays and extends the entire length of Maine’s coast, and Maine State Route 127 runs to the tip of one of the peninsulas, ending in Georgetown (Google, Inc., 2012). Amtrak’s Downeaster Rail Line has limited service to nearby Brunswick, but there are no stops within the County boundaries (Amtrak, Inc., 2012). There are also no major ferry routes that embark or disembark in the County. The three airports in Sagadahoc County serve private, non-commercial flights only; the nearest major airports include Portland International Jetport (approx. 40 miles), Bangor International Airport (approx.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

100 miles), and Boston’s Logan International Airport (approx. 150 miles) (American Public Transportation Association, 2012; Google, Inc., 2012).

3. Demographics

Sagadahoc County has a year-round population of 35,293 (U.S. Census Bureau, 2010a). The following three tables profile Sagadahoc County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has changed very minimally over the latest decade.

Exhibit 2. Population Profile

	Sagadahoc	Maine
Year-Round Population	35,293	1,328,361
Population Change (2000-2010)	0.22%	4.19%
Median Age (years)	44.1	42.7
Percent Female	51.6%	51.1%
Percent Foreign Born	2.5%	3.3%
<i>Ethnic Profile</i>		
White	96.2%	95.2%
Black/African American	0.7%	1.2%
Asian	0.8%	1.0%
Hispanic/Latino	1.3%	1.3%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Sagadahoc	Maine
Unemployment Rate	6.0%	8.3%
Percent Out of Labor Force	33.4%	35.5%
Median Household Income	\$55,891	\$45,815
Percent of Population Below Poverty Line	8.5%	12.9%
<i>Educational Attainment</i>		
High School Diploma	33.2%	34.4%
Bachelor’s Degree	19.7%	17.3%
Graduate/Professional Degree	11.5%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Sagadahoc	Maine
Population Density (people/sq. mile)	139.1	43.1
Housing Density (structures/sq. mile)	72.1	23.4
Housing Structures that Are Independent Units	85.5%	80.6%
Occupied Units	82.5%	75.5%
Properties for Seasonal, Rec. or Occasional Use	10.0%	16.4%
Median House Value	\$193,100	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Sagadahoc County was formerly inhabited by the Abaneki Tribe of the Algonquin Nation. The land was attacked and burned during King Phillip's War in 1676, and the native population began to decline. Eventually, land sales to colonists pushed the Abaneki north, where they still have two reservations in northern Maine, and seven in Canada. None of the nine groups are recognized by American or Canadian governments (Tolatsga, 1997).

Through land grants and purchases from Native Americans, Englishmen held the titles to the entire land area that is now Sagadahoc County by 1660. However, after the area was destroyed during King Phillip's War, the colonists abandoned the area and did not return until 1715. Industrialization came to the area in the early 19th century: steam power along the Kennebec River in 1818, the completion of the Maine Central Railroad in 1849, and the Knox and Lincoln Railroad in 1871 (Varney, 1886). However, the County's economy remained dependent on maritime activity, and still today exports focus on a mix between commercial fishing and ship building.

The County's roots are in ship building, thus many of the festivals focus on that aspect of the County's heritage. Bath Heritage Days, approaching its 40th annual event in July 2012, celebrates the town's history—a renowned shipbuilding center dating back to 1743—through carnivals, parade, barbeques, and arts (Bath Heritage Days, 2012).

5. Coastal Amenities

Despite Sagadahoc County's small area, the coastline is over 430 miles in length due to the extensive bays and coves spanning the large peninsulas (Island Institute, 2012). Because the coastline is comprised almost entirely of rocky, wooded, flats and cliffs, the County has only four public beaches. There are only a few marinas in the County, and no harbors and no yacht clubs. There is one national wildlife refuge in the County, the 10-acre Pond Island National Wildlife Refuge, but there are no national historic parks or sites (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The village of Bath was named a "Distinctive Destination" by the National Trust for Historic Preservation; tourism to the area is high in the summer for those with a taste for small boutique shops along narrow streets lined with 19th century brick buildings (Main Street Bath, 2012). The most visited attraction in the County, however, is the Maine Maritime Museum in Bath. The Museum includes original 19th century buildings, Victorian-era homes, an active waterfront, and New England's largest sculpture: a full-size representation of the Wyoming, the largest wooden sailing vessel ever built (Maine Maritime Museum, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 942 business establishments in Sagadahoc County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in the County is Bath Iron Works (a subsidiary of General Dynamics Corporation) that manufactures ships for the U.S. Navy, among other private clients. Sagadahoc County's economy has, for centuries, been dependent on shipbuilding and that tradition continues to this day (USM Muskie School of Public Service, Maine Statistical Analysis Center, 2009).

7. Coastal Tourism/Recreation Activity

Sagadahoc County's coastline is mostly rocky. Rocky coastlines provide ideal conditions for both on-shore fishing and off-shore fishing charters, which are favorite activities to locals and tourists alike. Seaside trails have been both naturally- and man-made and attract scores of hikers and nature enthusiasts; the Josephine Newman Sanctuary in Georgetown, which includes such features as mature

forest, cattail marsh, rocky coasts, tidal mud flats, and of course abundant wildlife, is one of the most popular and serene in the area.

While most of the coast is rocky, there are several sandy beaches that are remote and shielded by dunes and scrublands. These beaches offer only simple amenities such as restrooms, but they are ideal for sunbathing and beachcombing. Swimming is less common in Maine because of the generally colder waters. Some of the better spots for swimming and water activities are the natural sandbars and lagoons with shallower, warmer waters. The views from the beaches include rocky islands, lighthouses, and open sea (though open sea is only visible from beaches at the furthest points along the peninsulas).

There are 103 establishments dedicated to leisure and hospitality alone in Sagadahoc County; the average weekly wage for employees of these establishments is \$311. Between the winter and summer season in 2010, leisure and hospitality employment in Sagadahoc County increased by 747 jobs, or by over 75 percent (U.S. Bureau of Labor Statistics, 2010). Approximately 81.2 percent of all ocean recreation and tourism establishments in Sagadahoc County are small (U.S. Census Bureau, 2009).²

According to the 2010 U.S. Census, Sagadahoc County has only three hotels, seven bed and breakfasts, and two campgrounds (U.S. Census Bureau, 2009). Only 10 percent of all houses in Sagadahoc County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurants industry, despite the nearly 42 percent decline of the industry in the last five years (U.S. Bureau of Labor Statistics, 2010). Much data for Sagadahoc County were unavailable.

Exhibit 5. Sagadahoc County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	11	11	11	100% [#]
Renting Pleasure Boats (532292)	-	-	0	-
Land-Based				
Hotel Employment (72111)	0	242	132	-4.3%
Restaurant Employment (7221 & 7222)	439	649	530	-41.7%
Amusement, Gambling, Other Recreation (713)	49	206	119	7.2%
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

[#]Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

BLS figure for Boat Deals in 2005 was listed as 0.

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Waldo County, Maine

1. Synopsis

Waldo County, Maine lies in midcoast Maine as the inner-most county along the Penobscot Bay. The County is comprised of 25 towns and one city, each with very low population densities, although the County's population statistics mirror those of Maine's, on average. The most populated area is the city of Belfast, with a population of 6,668. The County's population is only 38,786 people (U.S. Census Bureau, 2010a).

Tourism represents a significant portion of the ocean economy in Waldo County. According to the National Oceanic and Atmospheric Administration, 83.3 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Roughly 89 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 89 ocean-related establishments directly employed 834 people (National Ocean Economics Program, 2012).

2. Location

Waldo County, shown in Exhibit 1, lies along the inner-most coast in the Penobscot Bay. It is also the northern-most county considered to be along "midcoast Maine." Nearby metropolitan areas include Bangor, approximately 20 miles north, and Portland, approximately 90 miles south (Google, Inc., 2012). The County has a land area of 852.7 square miles, and six of its municipalities are coastal (including the one island) (U. S. Census Bureau, 2010a). Waldo County is bordered by Knox and Lincoln Counties to the south, Kennebec County to the west, Penobscot County to the north, and Hancock County to the east.

Exhibit 1. Map of Waldo County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Interstate-95 traverses Waldo County for approximately one mile at its western-most location (Google, Inc., 2012). The Belfast Municipal Airport is a non-commercial airport only, and the Islesboro Airport, on the island of Islesboro, serves private charter flights to nearby mainland airports. Nearby international

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

airports include Bangor International Airport (as close as approx. 20 miles) and Portland International Jetport (approx. 90 miles) (American Public Transportation Association, 2012; Google, Inc., 2012). The Maine State Ferry Service operates a year-round ferry between Lincolnville and the island of Islesboro. There are no passenger rails in Waldo County (American Public Transportation Association, 2012).

3. Demographics

Waldo County has a year-round population of 38,786 (U.S. Census Bureau, 2010a). The following three tables profile Waldo County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased one and a half times as fast as Maine, on average. Other figures regarding Waldo County's population, economy, and housing structures largely mirror those of Maine's.

Exhibit 2. Population Profile

	Waldo	Maine
Year-Round Population	38,786	1,328,361
Population Change (2000-2010)	6.91%	4.19%
Median Age (years)	44.1	42.7
Percent Female	51.0%	51.1
Percent Foreign Born	1.3%	3.3%
<i>Ethnic Profile</i>		
White	97.1%	95.2%
Black/African American	0.4%	1.2%
Asian	0.4%	1.0
Hispanic/Latino	0.9%	1.3%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Waldo	Maine
Unemployment Rate	8.0%	8.3%
Percent Out of Labor Force	36.6%	35.5%
Median Household Income	\$40,753	\$45,815
Percent of Population Below Poverty Line	13.6%	12.9%
<i>Educational Attainment</i>		
High School Diploma	39.0%	34.4%
Bachelor's Degree	14.6%	17.3%
Graduate/Professional Degree	9.4%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Waldo	Maine
Population Density (people/sq. mile)	53.1	43.1
Housing Density (structures/sq. mile)	29.5	23.4
Housing Structures that Are Independent Units	90.9%	80.6%
Occupied Units	76.2%	75.5%
Properties for Seasonal, Rec. or Occasional Use	17.0%	16.4%
Median House Value	\$150,300	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Penobscot Tribe of the Abenaki Indians were the original inhabitants of the land that is now Waldo County. Although relations were mostly peaceful between the Abenaki and the colonists throughout the mid 17th century, land sales and wars with neighboring tribes eventually pushed the group north. Today, the Abenaki have two reservations in Northern Maine and seven in Canada; the groups are not recognized by either federal government (Tolatsga, 1997).

After villages were rebuilt following the devastation of the War of 1812, the seaport areas thrived. The city of Belfast became a major producer of wooden ships, using lumber that was shipped down the Kennebec River from the “lumber capital of North America,” in Bangor. Wooden ship construction faded, but did not entirely cease. Ship construction is still a major economic activity in Waldo County. The economy saw a great shift to seafood production at the turn of the 20th century, when the advent of refrigeration allowed local lobster, scallops, and fish to be exported to markets in Massachusetts and New York. Today, the economy represents a mix between the shipbuilding and seafood industries, with the recent addition of tourism (City of Bangor, Maine, 2012; Maine Office of Tourism, 2012).

Festivals in Waldo County honor both the maritime history, as well as the “typical” historic Maine community. The Belfast Harborfest is a weekend-long event with nautical activities, vendors, and the crowd favorite National Boatbuilding Challenge (Belfast Harbor Fest, 2012). The Belfast Arts Gallery Walk is a two month event that occurs every Friday evening in July and August, where artwork lines the streets and galleries of the downtown/harbor area of Belfast. The two-month event attracts many art enthusiasts to the area (Belfast Arts, 2011; Belfast Area Chamber of Commerce, 2012).

5. Coastal Amenities

Waldo County has 172 miles of coastline (State of Maine, Department of Conservation, 2012). The County has five public beaches, six harbors, two marinas/boatyards, and one yacht club (Maine Living, 2012). There are no national parks or national wildlife refuges and subsequently no nationally-protected land, but there are at least nine state parks, management areas, and preserves (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Waldo County’s most visited attraction is the Penobscot Marine Museum in Searsport. The Museum is the oldest maritime museum in the state of Maine, which displays marine art and artifacts, small crafts, ship models, and historic photography in seven exhibit buildings. The Museum pays tribute to the seafaring history of midcoast Maine. Other coastal attractions include smaller museums and, importantly, wooded and rocky areas for bird watching and other wildlife viewing (Penobscot Marine Museum, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 956 business establishments in Waldo County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County include Bank of America, Waldo County General Hospital, Creative Apparel, Penobscot-McCrum Frozen Foods, Duck Trap River Fish Farm, Robbins Lumber, and Matthews Brothers. The number of employees at each establishment was unavailable (Northern Maine Development Commission, 2010).

7. Coastal Tourism/Recreation Activity

Waldo County is along the inner-most shores of Penobscot Bay. Though mostly rocky, there are a few public beaches, the most popular being Lincolnville Beach, which is used for sunbathing, swimming, and wildlife searching, especially within the nearby rocky areas. Tourism brochures highlight the scenic

charter cruises through Penobscot Bay, whether the intent is for fishing, bird watching, guided wildlife watching, or simply to enjoy the scenery of Maine's rocky coast along the Bay. Sears Island, off the coast of Searsport, is the East Coast's largest uninhabited island and excellent for biking and walking along the many natural hiking trails, swimming along its shores, and even snowshoeing in the winter (Town of Searsport, 2011). Locals and tourists alike are constantly kayaking through the coves and along the shores. Waldo County fosters an active, nature-based coastal environment.

According to the National Oceanic and Atmospheric Administration, 83.3 percent of the ocean-related jobs in Waldo are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 108 establishments dedicated to leisure and hospitality alone in Waldo County; the average weekly wage for employees of these establishments is \$302. Between the winter and summer of 2010, leisure and hospitality employment in Waldo County increased by 834 jobs, or by almost 130 percent (U.S. Bureau of Labor Statistics, 2010). In 2009, 89 ocean-related establishments in the County directly employed only 834 people (National Ocean Economics Program, 2012). Approximately 89 percent of all ocean recreation and tourism establishments in Waldo County are small (U.S. Census Bureau, 2009).²

Waldo County has only nine hotels, four bed and breakfasts, and six campgrounds (U.S. Census Bureau, 2009). Only 17 percent of all houses in Waldo County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The restaurant industry has declined over the last five years, whereas the hotel industry and the amusement, gambling, and other recreation industry have increased by 20% and 34%, respectively.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Waldo County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	41	54	50	72.4%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	0	189	116	19.6%
Restaurant Employment (7221 & 7222)	482	830	614	-1.3%
Amusement, Gambling, Other Recreation (713)	57	165	103	33.8%
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	0	0	0	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

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Washington County, Maine

1. Synopsis

Washington County, Maine is the northernmost county along the Atlantic Coast in the United States. The County is one of the largest by land area along the eastern seaboard at 3,255 square miles, and has one of the lowest population densities at 12.8 people/square mile, well below even the Maine average. There are two cities and four towns in the County (MaineRec, 2012c). The County's population is 32,856 people (U.S. Census Bureau, 2010a).

Washington County's ocean tourism sector is small compared to surrounding counties and to national averages. According to the National Oceanic and Atmospheric Administration, only 59 percent of ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). 92.5 percent of all ocean recreation and tourism establishments are small (U.S. Census Bureau, 2009).¹ In 2009, the 113 ocean-related establishments in the County directly employed 946 people (National Ocean Economics Program, 2012).

2. Location

Washington County, shown in Exhibit 1, is the northeastern most point in the United States, being unofficially named the "sunrise county" because it is the first region in the United States to see the sunrise each day (Sunrise County Economic Council, 2012). The County shares a border with Canada, and is approximately 70 miles from some points within the County to Bangor, Maine, and over 300 miles to Boston, Massachusetts (Google, Inc., 2012). The County has 46 towns, of which only 17 are adjacent to the Atlantic Ocean or any of the several bays in the northeastern region of the County. Washington County is bordered by Hancock and Penobscot Counties to the west, Canada to the east and north, and the Atlantic Ocean to the south.

Exhibit 1. Map of Washington County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

No interstate highways run through Washington County, and in fact, very few major U.S. or Maine State Highways run through the County. U.S. Route 1 is the largest road through the County, which extends the length of the entire coast of Maine, and to the northern-most point in the state (Google, Inc., 2012). There is one ferry in the County which has a direct route between Eastport and Deer Island, New Brunswick, Canada. There are four municipal airports, though the nearest commercial air service is at the Hancock County-Bar Harbor Airport, approximately 60 miles south. No passenger railroads run through the County (American Public Transportation Association, 2012).

3. Demographics

Washington County has a year-round population of 32,856 (U.S. Census Bureau, 2010a). The following three tables profile Washington County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Washington County is more sparsely populated and less wealthy than the average county in Maine, and is facing a population on the decline.

Exhibit 2. Population Profile

	Washington	Maine
Year-Round Population	32,856	1,328,361
Population Change (2000-2010)	-3.2%	4.2%
Median Age (years)	46.1%	42.7%
Percent Female	50.7%	51.1%
Percent Foreign Born	4.0%	3.3%
<i>Ethnic Profile</i>		
White	92.1%	95.2%
Black/African American	0.4%	1.2%
Asian	0.5%	1.0%
Hispanic/Latino	1.4%	1.3%
American Indian	4.9%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Washington	Maine
Unemployment Rate	11.3%	8.3%
Percent Out of Labor Force	43.2%	35.5%
Median Household Income	\$33,707	\$45,815
Percent of Population Below Poverty Line	19.9%	12.9%
<i>Educational Attainment</i>		
High School Diploma	38.5%	34.4%
Bachelor's Degree	12.0%	17.3%
Graduate/Professional Degree	6.4%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Washington	Maine
Population Density (people/sq. mile)	12.8	43.1
Housing Density (structures/sq. mile)	9.0	23.4
Housing Structures that Are Independent Units	92.0%	80.6%
Occupied Units	62.2%	75.5%
Properties for Seasonal, Rec. or Occasional Use	27.5%	16.4%
Median House Value	\$102,300	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Passamaquoddy Tribe were the first people to live in northeastern North America. In the winters the population would spread inland to hunt, and in the summers they would congregate along the coast to fish. The Passamaquoddy have progressively moved north, dating back to the arrival of European colonists in the 16th century. Today, the Passamaquoddy live on the 37.5 square mile Indian Township Reservation in eastern Washington County. Though they do not have federal recognition, the State of Maine allows the Tribe to send one non-voting representative to the Maine House of Representatives (Passamaquoddy Tribe, 2011). The Passamaquoddy Tribe recently planned a \$120 million on-land wind farm on their reservation (Kiley, S, 2012).

The land that is now Washington County was first explored by the French at the turn of the 17th century, and by the English in the 1630s. The land was not actually settled until over a century later. The 1775 Battle of Machias, sometimes referred to as “The Lexington of the Seas,” was the first Revolutionary War Naval Battle, initiated when townspeople refused to provide the British with lumber for barracks, and won by the settlers. Today, the Margarett Days Festival celebrates the anniversary every year (Maine Historical Society, 2010; MaineRec, 2012a).

Washington County’s economy has relied on fishing, lobstering, and shipbuilding since its inception, and does still to this day. In the beginning, it was also an important port area nearest due to its proximity to Canada and Europe (northern Maine is the most direct route to Canada), but trade routes began flowing to New York and Boston, and northern Maine’s ports became obsolete. Northern Maine’s history of fishing, lobstering, and shipbuilding is evident in many of the villages’ daily functions as well as in their annual traditions (MaineRec, 2012a; Machias Bay Area Chamber of Commerce, 2012).

Three of the County’s important traditions include the Margarett Days Festival, The Machias Wild Blueberry Festival, and the Down East Spring Birding Festival. The Margarett Days Festival in Machias celebrates the anniversary of the First Naval Battle fought in the American Revolution in 1777. The Machias Wild Blueberry Festival happens in October of each year following the blueberry harvest; as the County produces 95% of the world’s blueberry crop, the harvest represents a major economic benchmark. The Down East Spring Birding Festival, held during the annual migration of birds returning to the area in May, encourages bird watchers to independently observe throughout the area’s national parks and refuges (Coastal Way Down East, 2009; MaineRec, 2012a; Machias Bay Area Chamber of Commerce, 2012).

5. Coastal Amenities

Washington County has 700 miles of coastline (MaineRec, 2012b). There are 17 public beaches, at least three marinas, but no yacht clubs. There are approximately 20 harbors in the County, but over 100 bays, coves, and inlets (MaineRec, 2012c). There are three national wildlife refuges that account for

29,816 acres of protected land and two international historic sites. These include: Moosehorn National Wildlife Refuge (20,016 acres); Maine Coastal Island National Wildlife Refuge (8,100 acres); Cross Island National Wildlife Refuge (1,700 acres); Roosevelt Campobello Island International Historic Site; and Saint Croix Island International Historic Site (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The two largest attractions to the County are the two International Historic Sites. The Roosevelt Campobello Island International Historic Site, southwest of the Bay of Fundy, was the summer retreat of U.S. President Franklin Delano Roosevelt prior to becoming President. The Saint Croix Island International Historic Site commemorates the site of the first settlement by European explorers (French) in North America (U.S. National Park Service, 2012). Other attractions are predominantly wildlife-based, including the three national wildlife refuges and the several state parks.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 871 business establishments in Washington County in 2010 (U.S. Bureau of Labor Statistics, 2010). Washington County currently has one of the highest unemployment rates in the state of Maine at 11.3%, and one of the highest percentages of the population out of the labor force at 43.2%. In general, Washington County is less wealthy than the average county in Maine (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

Washington County's coastline is comprised of several rock-lined bays and coves. The rocky coast and calm waters cater to ideal fishing, boating, and kayaking conditions. The bays, tidal areas, and wooded areas provide excellent habitats for birds, including the Puffin, as well as other on-shore animals, such as moose and deer. Wildlife viewing is one of Washington's biggest tourism draws, especially at the three national wildlife refuges and along the coastal Quoddy Loop Trail, among other undeveloped woodlands. The pebble-covered beaches in the County are better suited for walking and bird watching than they are for sunbathing and swimming (Down East & Acadia, 2012; Machias Bay Area Chamber of Commerce, 2012; Maine Tourism Association, 2012).

According to National Oceanic and Atmospheric Administration, approximately 59 percent of the ocean-related jobs in Washington are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 98 establishments dedicated to leisure and hospitality alone in Washington County; the average weekly wage for employees of these establishments is \$233. Between the winter and summer of 2010, leisure and hospitality employment in Washington County increased by only 314 jobs, or by approximately 63 percent (U.S. Bureau of Labor Statistics, 2010). 92.5 percent of all ocean recreation and tourism establishments in Washington County are small (U.S. Census Bureau, 2009).²

In 2009, 113 ocean-related establishments in the County directly employed 946 people. In 2000, 125 establishments directly employed 1,369 people. Between 2000 and 2009, the number of ocean-related establishments decreased by 9.6 percent and the number of people employed by those establishments decreased by 30.9 percent (National Ocean Economics Program, 2012).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

According to the U.S. Census, there are 13 hotels, two bed and breakfasts, and nine campgrounds in Washington County (U.S. Census Bureau, 2009). An additional 27.5 percent of all houses in Washington County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry. Since 2005, each industry where U.S. Bureau of Labor Statistics data were available has declined (U.S. Bureau of Labor Statistics, 2010). The majority of this data, however, were unavailable and conclusions cannot be made for several of the industries.

Exhibit 5. Washington County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	0	0	0	-100% [#]
Boat Dealers (441222)	41	44	42	-8.7%
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	42	65	56	-28.2%
Restaurant Employment (7221 & 7222)	417	622	507	-15.9%
Amusement, Gambling, Other Recreation (713)	0	0	0	0
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Bureau of Labor Statistics figure for Boat Building and Repair in 2005 was listed as 46.

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York County, Maine

1. Synopsis

York County, Maine is the southern-most county in Maine on the border with New Hampshire. The County is comprised of 29 towns and cities with low population and housing densities, although both are significantly higher than the average densities in Maine. The most populous city is Biddeford with a population of 21,277. The County's population is 197,131 people (U.S. Census Bureau, 2010a).

Tourism represents a large percentage of the York County ocean economy. According to the National Oceanic and Atmospheric Administration, 93.8 percent of all ocean-related jobs are related to tourism. 85.2 percent of all ocean recreation and tourism establishments in York County are small (U.S. Census Bureau, 2009).¹ In 2009, 568 ocean-related establishments in York County directly employed 6,932 people (National Ocean Economics Program, 2012).

2. Location

York County, shown in Exhibit 1, lies in southern Maine, just north of Portsmouth, New Hampshire, as close as 15 miles from Portland, Maine, and approximately 80 miles from Boston, Massachusetts (Google, Inc., 2012). It has a land area of 1,271.3 square miles (U.S. Census Bureau, 2010a). Only nine of its 29 towns lie along the coast. York County is bordered by New Hampshire to the south and west, Cumberland County, Maine to the north, and the Atlantic Ocean to the east.

Exhibit 1. Map of York County



Source: ESRI, 2011 and OpenStreetMap, 2011.

York County is very accessible by car: Interstate-95 runs the length of the County, and connects northern Maine to the entire eastern seaboard; U.S. Route 1 runs parallel along the entire length of I-95 in York County, and continues north to the northern-most point in the state (Google, Inc., 2012). Amtrak's Downeaster Rail Line, operates several daily routes between Boston, Massachusetts and Brunswick, Maine. Three of its 12 stops are in York County (Amtrak, Inc., 2012). There are several smaller airports within the County, but two international airports—Portsmouth International Airport at Pease (NH) and

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Portland International Jetport—lie just outside the County’s limits. Similarly, ferries operate from nearby Portland, Maine and Portsmouth, New Hampshire, but none with terminals within York County (American Public Transportation Association, 2012).

3. Demographics

York County has a year-round population of 197,131 (U.S. Census Bureau, 2010a). The following three tables profile York County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the data roughly mirror those of Maine, although the County is slightly wealthier and more densely populated. House values in York County are the highest in the state.

Exhibit 2. Population Profile

	York	Maine
Year-Round Population	197,131	1,328,361
Population Change (2000-2010)	5.6%	4.2%
Median Age (years)	43.0	42.7
Percent Female	51.3%	51.1%
Percent Foreign Born	3.1%	3.3%
<i>Ethnic Profile</i>		
White	96.4%	95.2%
Black/African American	0.6%	1.2%
Asian	1.1%	1.0%
Hispanic/Latino	1.3%	1.3%
American Indian	0.3%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	York	Maine
Unemployment Rate	8.6%	8.3%
Percent Out of Labor Force	32.4%	35.5%
Median Household Income	\$54,880	\$45,815
Percent of Population Below Poverty Line	10.2%	12.9%
<i>Educational Attainment</i>		
High School Diploma	33.5%	34.4%
Bachelor’s Degree	16.9%	17.3%
Graduate/Professional Degree	8.1%	9.5%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	York	Maine
Population Density (people/sq. mile)	199.0	43.1
Housing Density (structures/sq. mile)	106.8	23.4
Housing Structures that Are Independent Units	77.6%	80.6%
Occupied Units	76.6%	75.5%
Properties for Seasonal, Rec. or Occasional Use	17.6%	16.4%
Median House Value	\$233,300	\$176,200

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Abenaki Indian Tribe inhabited what is now York County prior to the arrival of European Colonists. Disease, wars with neighboring tribes, and pressures from colonists to sell their land forced the Tribe to move north. Though not federally-recognized, the Abenaki have three reservations in northern Maine and seven reservations in New Brunswick and Quebec, Canada (Tolatsga, 1997).

European Colonists first arrived in 1622, moving north from their original settlements in Massachusetts. The early economy in the area centered on shipbuilding and fishing. Tourism rose as an important industry in the early 20th century, after artists were attracted to the old villages and the sandy beaches. Increased visitation spurred the growth of seaside hotels and inns, and still today the accommodations built nearly a century ago remain as historical landmarks marking the rise of tourism. York County is now also a popular LGBT destination, especially in the village of Ogunquit (Ogunquit Chamber of Commerce, 2012; Town of Wells, Maine, 2012).

Festivals in York County include: the Kennebunk Old Home Week, a celebration of “century-old traditions” of family, artistry, and history of the Kennebunk area, and features local artists, a farmers market, and a lobster bake; OgunquitFest, which celebrates the fall seasons with events such as a classic car show, a craft bazaar, and wagon rides; and York Harvestfest, which this years’ 28th annual event will feature over 150 vendors and live music (Kennebunk Festivals Committee, 2011; Ogunquit Chamber of Commerce, 2012; The Greater York Chamber of Commerce, 2012).

5. Coastal Amenities

York County has 291 miles of coastline with over a hundred public beach access points (Island Institute, 2012). The York County coastline is a mix between sand beaches and long stretches of rocky and/or wooded shoreline. There are three harbors, eight marinas/boatyards, and four yacht clubs in the County. The Rachel Carson National Wildlife Refuge along the central coast in York County accounts for 7,600 acres of protected land; there are no other national parks in the County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

While picturesque villages in close proximity to sandy beaches are York County’s biggest tourist draw, other smaller museums and landmarks provide for daily activities. These include the County’s three lighthouses – the Cape Neddick Light Station, the Goat Island Lighthouse, and the Wood Island Lighthouse – and three of the more well-known museums – Ogunquit Heritage Museum, Saco Museum, and the Brick Store Museum in Kennebunk.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 5,492 business establishments in York County in 2010 (U.S. Bureau of Labor Statistics, 2010). The two largest employers in the County, each which employ over 1,000 people, are the Portsmouth Naval Shipyard and Pratt & Whitney, an airplane engine manufacturer (Pactsplan, 2012). Several businesses in York County are open in the summer months only.

7. Coastal Tourism/Recreation Activity

The York County coastline is a popular summer resort or vacation destination for families. The majority of beaches are quiet and undeveloped, except for Old Orchard Beach at the northern-most point in the County. Old Orchard Beach has a boardwalk with shops, carnival-type rides, nightlife, and other similar attractions. The majority of the beaches in the County, however, are more remote and far less populated. The several-mile-long stretches of sand beach are ideal for sunbathing, swimming, beachcombing, and walking, whereas the more rocky and wooded sections create ideal wildlife habitats

and attract nature enthusiasts. The combination of rocky cliffs and sandy beach along the York County coastline creates ideal fishing, boating, kayaking, and recreational surfing conditions.

According to National Oceanic and Atmospheric Administration, 93.8 percent of the ocean-related jobs in York are related to tourism (National Oceanic and Atmospheric Administration, 2012). The U.S. Census Bureau lists 871 establishments that are dedicated to leisure and hospitality alone in York County; the average weekly wage for employees of these establishments is \$333. Between the heights of the winter and summer seasons in 2010, leisure and hospitality employment in York County increased by 8,924 jobs, or by approximately 133 percent; many of the County's hotels and restaurants are closed in the winter offseason (U.S. Census Bureau, 2010b). 85.2 percent of all ocean recreation and tourism establishments in York County are small (U.S. Census Bureau, 2009).²

In 2009, 568 ocean-related establishments in the County directly employed 6,932 people. In 2000, 607 establishments employed 9,930 people. Between 2000 and 2009, the number of ocean-related establishments decreased by 6.4 percent and the number employed by these establishments decreased by 30.2 percent (National Ocean Economics Program, 2012).

There are 165 hotels, 35 bed and breakfasts, and 39 campgrounds in York County (U.S. Census Bureau, 2009). An additional 17.6 percent of all houses in York County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, although employment in the hotel industry and the amusement, gambling, and other recreation industry increases by a larger percent in summer months (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 illustrates this highly seasonal nature of the York County economy.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. York County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	37	16	100% [#]
Marinas (713930)	36	74	52	30.0%
Boat Building and Repair (336612)	19	17	16	-40.7%
Boat Dealers (441222)	18	22	20	5.3%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	998	3,185	1,979	0.2%
Restaurant Employment (7221 & 7222)	4,707	9,039	6,562	7.2%
Amusement, Gambling, Other Recreation (713)	518	1,824	976	1.8
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	11	12	100% [#]

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Bureau of Labor Statistics figures for Scenic and Sightseeing Transportation, Water and Tour Bus, Scenic, and Sightseeing, Operation in 2005 were listed as 0.

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Anne Arundel County, Maryland

1. Synopsis

Anne Arundel County is located along the western edge of the Chesapeake Bay in Maryland. The “land of pleasant living,” Anne Arundel County is known for its rich history and sailing-oriented waterfront, as well as its proximity to major urban centers like Baltimore and Washington, DC (Anne Arundel County, MD, 2008b). Anne Arundel County consists of two incorporated municipalities, Annapolis and Highland Beach, and a collection of smaller towns and communities without local government (Maryland State Archives, 2004). Anne Arundel has a population of almost 540,000 people and a high population and housing density (1,296 people and 512 housing units per square mile) (U.S. Census Bureau, 2010). Industrial and commercial development provides the County’s economic base.

Tourism represents a large portion of the ocean economy in Anne Arundel, although it is less significant in Anne Arundel than in neighboring coastal counties. According to the National Oceanic and Atmospheric Administration, an estimated 59.8 percent of the ocean-related jobs in Anne Arundel County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 59 percent of ocean recreation and tourism-related businesses in Anne Arundel County are small (U.S. Census Bureau, 2009).¹ In 2009, 892 ocean-related establishments directly employed 22,880 people (National Ocean Economics Program, 2012).

2. Location

Anne Arundel County, shown in Exhibit 1, is located along the western edge of the Chesapeake Bay. Anne Arundel shares a border with Baltimore, Calvert, Kent, Howard, Prince George’s, Queen Anne’s, and Talbot Counties (Google, Inc., 2012). The capital of Anne Arundel County, Annapolis, is located just 26 miles from Baltimore and 32 miles from Washington, DC (The Official Destination Marketing Organization, 2012a). The County has a land area of 415 square miles and 533 miles of shoreline along the Chesapeake Bay (Anne Arundel County, MD, 2008a; U.S. Census Bureau, 2010).

Exhibit 1. Map of Anne Arundel County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Anne Arundel County can be reached by car, rail, bus, and plane. Interstate Highway Routes 97, 695, 895, 195, and 595, as well as Maryland State Highway 100, cross various portions of the County (Google, Inc., 2012). Rail operators servicing Anne Arundel County include the Maryland Transit Administration, Maryland Area Regional Commuter, and Amtrak. Public and private bus operators also carry passengers throughout the County. The Baltimore-Washington International Thurgood Marshall Airport is located in Anne Arundel County; in 2005, about 19.74 million travelers passed through the airport (The Official Destination Marketing Organization, 2012a).

3. Demographics

Anne Arundel County has a year-round population of 537,656 (U.S. Census Bureau, 2010). The following three tables profile Anne Arundel County's population. As Exhibit 2 shows, the population has grown in the past decade at a rate of 9.8 percent, which mirrors the state population growth of 9.0 percent over the same time period.

Exhibit 2. Population Profile

	Anne Arundel	Maryland
Year-Round Population	537,656	5,296,486
Population Change (2000-2010)	9.8%	9.0%
Median Age (Years)	38.4	38
Percent Female	50.6%	51.6%
Percent Foreign Born	7.5%	13.2%
<i>Ethnic Profile</i>		
White	75.4%	58.2%
Black/African American	15.5%	29.4%
Asian	3.4%	5.5%
Hispanic/Latino	6.1%	8.2%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Anne Arundel	Maryland
Unemployment Rate	5.5%	6.6%
Percent Out of Labor Force	29.8%	30.4%
Median Household Income	\$83,456	\$70,647
Percent of Pop. Below Poverty Line	5.3%	8.6%
<i>Educational Attainment</i>		
High School Diploma	26.2%	26.3%
Bachelor's Degree	20.9%	19.7%
Graduate/Professional Degree	14.8%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Anne Arundel	Maryland
Population Density (people/sq. mile)	1,295.9	594.8
Housing Density (structures/sq. mile)	512.3	218.5
Housing Structures that are Independent Units	62.0%	51.6%
Occupied Units	93.8%	90.1%
Properties for Seasonal, Rec. or Occasional Use	1.4%	2.3%
Median House Value	\$370,100	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The first Europeans to settle in Anne Arundel County were Virginia Puritans offered religious freedom by Maryland Colony proprietor, Cecil Calvert, in 1649. The County was named after Lady Anne Arundel, Calvert's wife and a member of the Arundells family from Cornwall, England. In 1655, the Battle of the Severn took place in Anne Arundel County between forces loyal to the Commonwealth of England and those loyal to Calvert.

Due to its favorable climate and soil, Anne Arundel County developed a tobacco industry, with trade possible through the ports of London Town and Ann Arundell Towne. The rapid growth of the industry led to the introduction of slavery and subsequent soil depletion. Farmers were forced to relocate and the County's economy began to shift to non-agricultural industries. The remaining farmers shifted to other crops, including peas, beans, strawberries, and cantaloupes.

During the Civil War, Anne Arundel was occupied by Union troops. The war prompted industrialization, which continued during World War II and was further propelled by the suburbanization movement in the mid-1900s. Companies relocated to Anne Arundel and established employers, like Fort Severn Naval Academy and Fort George Meade, continued to expand. Commercial interests also found a home in Anne Arundel; the Harundale Mall, one of the United States' first enclosed shopping malls, opened in the mid-1900s. With Anne Arundel's proximity to major urban areas and well-developed transportation network, industrial and commercial development has been strong.

The recreation industry also began to develop in the late 1800s. Summer resorts opened along the shoreline, fed by rail lines carrying tourists from Baltimore and Washington, DC. Highland Beach was established in 1893 as an exclusive resort for African Americans and has been a destination for such influential people as Booker T. Washington and Mary Church Terrell (Anne Arundel County, MD, 2008a).

Anne Arundel County hosts several coastal-themed festivals. These include: the Annapolis Nautical Flea Market, Chesapeake Bay Blues Festival, Maryland Seafood Festival, and Lights on the Bay (Maryland Office of Tourism, 2012).

5. Coastal Amenities

Anne Arundel County has shoreline along the Chesapeake Bay and a network of creeks and rivers. The County has 5 beaches, 60 marinas, and 34 yacht clubs (U.S. Census Bureau, 2009). Anne Arundel's yacht clubs are landmarks, in themselves; they serve as gathering places for residents and tourists to take part in the County's annual boating events. From April through September, about 130 boat crews compete in the Wednesday Night Sailing Races, departing from the Annapolis Yacht Club. On Fridays, fifty boats race on the Severn River to the finish line at the Eastport Yacht Club. Some of Anne Arundel's eateries are

also famous; the Boatyard Bar and Grill has been named one of the “Top 12 Sailing Bars in the World” by Sail Magazine (The Official Destination Marketing Organization, 2012b).

There are no national parks or refuges and no federally-protected land (U.S. National Park Service, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 13,729 business establishments in Anne Arundel County in 2009 (U.S. Census Bureau, 2009). As of 2012, the largest employers in the County are Fort George G. Meade, with 55,365 employees, and Anne Arundel County Public Schools, with 14,000 employees (Anne Arundel Economic Development Corporation, 2012).

7. Coastal Tourism/Recreation Activity

Anne Arundel County is an excellent destination for sailors. Annapolis is dubbed “America’s Sailing Capital” by the Official Destination Marketing Organization for Annapolis & Anne Arundel County. Multiple times a week throughout the year, tourists can watch boat crews race down the Chesapeake Bay, while relaxing at waterfront restaurants and bars. Sailing enthusiasts can also enjoy the National Sailing Hall of Fame (The Official Destination Marketing Organization, 2012b).

The Marketing Organization also highlights Anne Arundel’s rich history and recommends a number of historic landmarks in Anne Arundel County. For example, visitors can tour the U.S. Naval Academy and other historic sites like the Maryland State House, which is the oldest state house continuously in use, and the homes of several signers of the Declaration of Independence. Because of the proximity of historic landmarks to the shore, Anne Arundel provides a unique opportunity for tourists to participate in both waterfront activities and historic site seeing (The Official Destination Marketing Organization, 2012a).

According to the National Oceanic and Atmospheric Administration, an estimated 59.8 percent of the ocean-related jobs in Anne Arundel County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism economy sales in Anne Arundel County reached \$3,218.7 million in 2010, with \$1,343.7 million in tourism labor income and 27,094 jobs supported by the tourism economy (Tourism Economics, 2011). There are 1,335 establishments dedicated to leisure and hospitality alone in Anne Arundel County; the average weekly wage for employees of these establishments is \$374. Leisure and hospitality employment in Anne Arundel County increased by 12.24 percent from winter to summer in 2010, which reflects the somewhat seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, approximately 59 percent of ocean recreation and tourism-related businesses in Anne Arundel County are small (U.S. Census Bureau, 2009).²

In 2009, 892 ocean-related establishments directly employed 22,880 people in Anne Arundel. This reflects an increase from 2000, when 591 such establishments employed 14,825 people. These changes represent growth of 50.1 percent and 54.3 percent for establishments and employment in the ocean economy, respectively, between 2000 and 2009 (National Ocean Economics Program, 2012).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

There are approximately 64 hotels, 8 bed and breakfasts, and three campgrounds in Anne Arundel County (U.S. Census Bureau, 2009). There are 10,440 rooms available in the Greater Annapolis community alone and, in 2011, visitor accommodations grossed \$13.8 million in hotel and motel tax revenue in Anne Arundel County (Maryland Association of Counties, 2011; The Official Destination Marketing Organization, 2012a). About 1.4 percent of all houses in Anne Arundel County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and recreation industry. The largest marine tourism-related employer is the marinas industry, which grew modestly from 2005 to 2010. The boat dealers industry has declined since 2005, but still has a significant presence in Anne Arundel County. According to U.S. Bureau of Labor Statistics data, the employment in the travel agencies and tour operators industries has dropped dramatically since 2005. The data in Exhibit 5 further illustrates the change in employment by season.

Exhibit 5. Anne Arundel County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	357	554	448	3.9%
Boat Building and Repair (336612)	0	69	0	0%
Boat Dealers (441222)	238	324	281	-49.8%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	2,236	2,332	2,289	-1.1%
Restaurant Employment (7221 & 7222)	18,917	20,351	19,754	10.1%
Amusement, Gambling, Other Recreation (713)	2,910	4,221	3,430	0.6%
General Tourism				
Travel Agencies (561510)	0	167	0	-100.0%
Tour Operators (561520)	0	0	0	-100.0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

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Calvert County, Maryland

1. Synopsis

Calvert County, Maryland is located on the western side of the Chesapeake Bay in Southern Maryland. Calvert County is known as the “Charm of the Chesapeake” for its high quality of life and proximity to major urban centers, Baltimore, Annapolis, and Washington, DC (Calvert County Department of Economic Development, 2006). Calvert County has two incorporated towns, Chesapeake Beach and North Beach, and numerous unincorporated areas, including seven “town centers.” Key industries in Calvert County include defense contracting, information technology, administrative services, and tourism (Calvert County Government, 2012).

Tourism represents a significant portion of the ocean economy in Calvert. In 2009, 148 ocean-related establishments directly employed 2,221 people (National Ocean Economics Program, 2012). According to National Oceanic and Atmospheric Administration, 98.1 percent of the ocean-related jobs in Calvert are related to tourism (National Oceanic and Atmospheric Administration, 2012). The majority—73.1 percent—of ocean recreation and tourism businesses in Calvert County are small (U.S. Census Bureau, 2009).¹

2. Location

Calvert County, shown in Exhibit 1, is located in a peninsula on the western edge of the Chesapeake Bay. It is bordered by the Chesapeake Bay on the east and the Patuxent River to the west. Adjacent counties include: Anne Arundel County (to the north), Prince George’s County (to the northwest), Charles County (to the west), Dorchester County (to the East), Talbot County (to the east), and St. Mary’s County (to the south) (Google, Inc., 2012). Calvert’s County seat, Prince Frederick, lies 35 miles from Washington, DC and 55 miles from Baltimore (Calvert County Government, 2012). Maryland’s smallest county, Calvert has a land area of 213 square miles (U.S Census Bureau, 2010). Its shoreline stretches 230 miles (Maryland Department of Business & Economic Development, 2012).

Exhibit 1. Map of Calvert County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Calvert County is accessible by car on Maryland Route 4, a main artery coming from Washington, DC, and by Maryland Route 2, from Annapolis. Routes 2 and 4 merge and travel together through much of Calvert County, together known as Solomons Island Road. Other major thoroughfares include Maryland Routes 231 and 250 (Google, Inc., 2012). Calvert County is served by three major airports, located in nearby Baltimore and Washington, DC. There is also a public bus system that operates in the County (Calvert County Department of Economic Development, 2006).

3. Demographics

Calvert County has a year-round population of 88,737 (U.S. Census Bureau, 2010). The following three tables profile Calvert County's population and demographics compared to the rest of the state. As Exhibit 2 shows, population growth in Calvert County (19.0 percent) has outpaced the state population growth (9.0 percent) in the past decade.

Exhibit 2. Population Profile

	Calvert	Maryland
Year-Round Population	88,737	5,296,486
Population Change (2000-2010)	19.0%	9.0%
Median Age (Years)	40.1	38
Percent Female	50.7%	48.2%
Percent Foreign Born	3.5%	51.6%
<i>Ethnic Profile</i>		
White	81.4%	58.2%
Black/African American	13.4%	29.4%
Asian	1.4%	5.5%
Hispanic/Latino	2.7%	8.2%
American Indian	0.4%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Calvert	Maryland
Unemployment Rate	4.4%	6.6%
Percent Out of Labor Force	28.7%	30.4%
Median Household Income	\$90,838	\$70,647
Percent of Pop. Below Poverty Line	4.4%	8.6%
<i>Educational Attainment</i>		
High School Diploma	33.6%	26.3%
Bachelor's Degree	17.1%	19.7%
Graduate/Professional Degree	11.9%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Calvert	Maryland
Population Density (people/sq. mile)	416.3	594.8
Housing Density (structures/sq. mile)	158.5	218.5
Housing Structures that are Independent Units	86.8%	51.6%
Occupied Units	91.4%	90.1%
Properties for Seasonal, Rec. or Occasional Use	3.8%	2.3%
Median House Value	\$392,900	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

One of the oldest counties in Maryland and in the United States, Calvert County was first settled by Europeans around 1650. It was established as Patuxent County in 1654 and renamed Calvert County in 1658 (Maryland State Archives, 2011). At the time of the Europeans' arrival, the Piscataway tribe inhabited the region along the Patuxent River, where they farmed corn and tobacco. The County's economy developed around the tobacco industry.

During the American Revolution, Calvert County was a center of battle between the British and American troops. It was also intimately involved in the Civil War, when differing loyalties tore at the County's unity. At the end of the Civil War, Calvert County was dramatically changed. The abolishment of slavery led to a decline in the labor-intensive tobacco industry. The County shifted toward a marine-based economy, including fishing and boat-building. The economy of Calvert County was further shaped by the introduction of the automobile, which facilitated inland development, and of the defense industry. During the World Wars, Calvert County became a training site for Navy and Marine personnel; the invasion of Normandy was simulated at the Cliffs of Calvert.

In addition to the thriving marine and defense economy, County has evolved into a resort community and exurban neighborhood of nearby urban centers, such as Washington, DC. Calvert County has also provided the setting for various movies and television programs. Its reputation for a high quality of life fuels the population and economic growth that continues today (Calvert County Government, 2012).

Calvert County hosts several annual festivals, including: the Patuxent River Appreciation Days, Celtic Festival of Southern Maryland, and Bay Harvestfest (Maryland Department of Business & Economic Development, 2012).

5. Coastal Amenities

The coastline of Calvert County is distinctive. Along the Chesapeake Bay, steep cliffs of clay and sand rise 125 to 135 feet and give way to woods; on the other side of the peninsula, rolling fields slip into the Patuxent River (Calvert County Government, 2012). The County has five public beaches and no national parks, national wildlife refuges, or protected land. Calvert County does house one state park, Calvert Cliffs State Park, which offers a two-mile hiking trail, as well as areas for fishing and picnicking. Another historically significant coastal landmark is the Cove Point Lighthouse, built in 1828 (Calvert County Department of Economic Development, 2006). There are approximately 12 marinas/boatyards, six yacht clubs, and one harbor in the County (U.S. Census Bureau, 2009).

6. General Economic Situation

The U.S. Census Bureau listed 1,741 business establishments in Calvert County in 2009 (U.S. Census Bureau, 2009). According to the County's 2011 Annual Financial Report, the five largest employers in the County are: Calvert County Public Schools, Calvert County Government, Calvert Memorial Hospital, Constellation Energy Group, and Wal-Mart (Calvert County Department of Finance & Budget, 2011).

7. Coastal Tourism/Recreation Activity

Coastal tourism in Calvert County is oriented toward the County's natural beauty, history, and luxury communities. The Calvert County Department of Economic Development website highlights the County's focus on providing "upscale" amenities to "serve the discerning visitor." Recreational activities available for tourists include walking, biking, birdwatching, fossil hunting, fishing, crabbing, boating, shopping, and visiting spas and wineries. For a taste of Calvert's history, tourists can visit museums like the Chesapeake Beach Railway Museum, Jefferson Patterson Park and Museum, Calvert Marine Museum, and Bayside History Museum and can tour historic buildings (Calvert County Department of Economic Development, 2006).

According to National Oceanic and Atmospheric Administration, 98.1 percent of the ocean-related jobs in Calvert are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism—coastal and otherwise—accounted for \$134.9 million in sales and \$70.2 million in labor income, while supporting 1,967 jobs (Tourism Economics, 2011). There are 179 establishments dedicated to leisure and hospitality alone in Calvert County; the average weekly wage for employees of these establishments is \$306. Leisure and hospitality employment in Calvert County increased by 558 jobs, or by only 20.9 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). According to the U.S. Census Bureau, 73.1 percent of ocean recreation and tourism businesses in Calvert County are small (U.S. Census Bureau, 2009).²

In 2009, 148 ocean-related establishments directly employed 2,221 people in Calvert. This reflects an increase from 2000, when 74 such establishments employed 1,001 people. These changes represent growth of 100.0 percent and 121.9 percent for establishments and employment in the ocean economy, respectively, between 2000 and 2009 (National Ocean Economics Program, 2012).

There are approximately seven hotels, two bed and breakfasts, and two campgrounds in Calvert County (U.S. Census Bureau, 2009). In 2011, the hotel tax generated \$815,416 in revenue for the County (Calvert County Department of Finance & Budget, 2011). About 3.8 percent of all houses in Calvert County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry and the marinas industry. It is important to note that many people who work in Calvert County live in surrounding counties.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Calvert County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	3	-50.0%
Marinas (713930)	79	111	100	-16.0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	0	0	0	-100.0%
Restaurant Employment (7221 & 7222)	2,135	2,539	2,347	11.7%
Amusement, Gambling, Other Recreation (713)	265	340	312	-12.1%
General Tourism				
Travel Agencies (561510)	-	-	-	- [^]
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Ocean City Town, Maryland

1. Synopsis

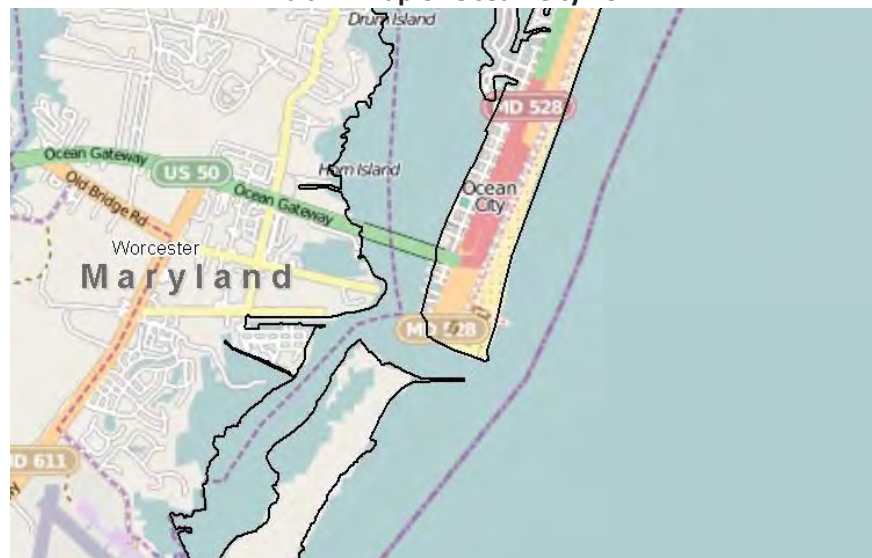
Ocean City, Maryland is a town in Worcester County, located between the Atlantic Ocean and the Assawoman Bay and Isle of Wight Bay. The town is well-known for its 10-mile stretch of free public beach, three-mile boardwalk, fishing culture, and abundance of recreation options. Ocean City is dense with people and housing, with 1,610 people and 6,829 housing units per square mile (U.S. Census Bureau, 2010). The town's economy depends on its tourism and fishing industries.

Tourism represents a significant portion of the ocean economy in Ocean City. According to the National Oceanic and Atmospheric Administration, 89.3 percent of the ocean-related jobs in Ocean City are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 71.5 percent of ocean recreation and tourism businesses in the City are small (U.S. Census Bureau, 2009).¹

2. Location

Ocean City Town, shown in Exhibit 1, is located in Worcester County, Maryland. It lies 150 miles from Philadelphia, Baltimore, and Washington, DC (Greater Ocean City Area Chamber of Commerce, 2012). The town is bordered by the Atlantic Ocean (to the east), the Assawoman Bay (to the northwest), and the Isle of Wight Bay (to the southwest) (Google, Inc., 2012). Ocean City's land area is 4.4 square miles. The City has a 10-mile shoreline (Greater Ocean City Area Chamber of Commerce, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Ocean City Town



Source: ESRI, 2011 and OpenStreetMap, 2011.

Ocean City Town is accessible by car on U.S. Route 50 and Maryland Route 90 (Google, Inc., 2012). Within Ocean City, a public tram carries passengers along the three-mile boardwalk and municipal buses travel the length of the Coastal Highway 24. To arrive by plane, tourists can fly to the Salisbury-Ocean City Regional Airport, which is served by USAir and located 30 minutes away by car. Alternatively, both

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

the Baltimore-Washington International Airport and Philadelphia Airport are located within a three-hour drive from Ocean City (Greater Ocean City Area Chamber of Commerce, 2012).

3. Demographics

Ocean City Town has a year-round population of 7,102 (U.S. Census Bureau, 2010). The following three tables profile Ocean City Town’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population in Ocean City Town has declined slightly (1 per cent) over the past decade. This contrasts with the State-wide population growth of 9 percent.

Exhibit 2. Population Profile

	Ocean City	Maryland
Year-Round Population	7,102	5,296,486
Population Change (2000-2010)	-1.0%	9.0%
Median Age (years)	54.2	38
Percent Female	48.6%	13.2%
Percent Foreign Born	7.7%	51.6%
<i>Ethnic Profile</i>		
White	92.2%	58.2%
Black/African American	2.7%	29.4%
Asian	1.3%	5.5%
Hispanic/Latino	5.9%	8.2%
American Indian	0.2%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Ocean City	Maryland
Unemployment Rate	6.7%	6.6%
Percent Out of Labor Force	49.9%	30.4%
Median Household Income	\$49,000	\$70,647
Percent of Population Below Poverty Line	11.3%	8.6%
<i>Educational Attainment</i>		
High School Diploma	27.1%	26.3%
Bachelor’s Degree	23.3%	19.7%
Graduate/Professional Degree	9.5%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Ocean City	Maryland
Population Density (people/sq. mile)	1,609.7	594.8
Housing Density (structures/sq. mile)	6,829.7	218.5
Housing Structures that Are Independent Units	10.2%	51.6%
Occupied Units	12.8%	90.1%
Properties for Seasonal, Rec. or Occasional Use	74.2%	2.3%
Median House Value	\$374,600	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The area of present-day Ocean City was settled by Virginians in the late 1600s. At the time of the Europeans arrival, the Assateague Indians inhabited the region. European authorities in Maryland made a treaty with the Assateagues in 1662 stating that land would be exchanged for goods and that no aggression was to occur, although this treaty was not fully abided. Eventually, through aggression and subsequent treaties that assigned reservation land to the tribe, the Assateague people were removed from the area.

In 1869, the land under present-day Ocean City was purchased by businessman Isaac Coffin, who constructed a beach-front cottage for visitors coming by stage coach and ferry. Visitors were drawn to the area by the ocean and the opportunity to fish, collect shells, and relax.

Other businessmen followed, segmenting the land into lots for the development of boarding houses and hotels. When the first hotel was constructed in 1875, visitors were arriving by rail. The train tracks were destroyed during a hurricane in 1933, which also separated Ocean City from neighboring Assateague Island. Despite the loss of the tracks, Ocean City continued to be a popular tourist destination. The construction of the Chesapeake Bay Bridge in 1952 made Ocean City more accessible to residents of the Baltimore and Washington, DC and, in the 1970s, over 10,000 condominium units were constructed to satisfy the growing tourist demand. In recent years, older buildings have been razed to make room for more parking, hotels, and condominiums. Hundreds of thousands of vacationers travel to Ocean City every year.

Ocean City has also developed into an important commercial and recreational fishing port. Most of the fishing today takes place offshore, although there are fisheries in the Assawoman Bay. Ocean City hosts several fishing tournaments each year, including the Mako Mania Shark Tournament in June, the Ocean City Tuna Tournament in July, and the world's largest billfish tournament, the White Marlin Open, in August. In recognition of its active fishing community, the city bills itself as the "White Marlin Capital of the World."

Caught between a developed shorefront and the pounding Atlantic waves, the beach has shrunk with time, prompting several beach replenishment projects (Greater Ocean City Area Chamber of Commerce, 2012; National Marine Fisheries Service, 2012; Ocean City Museum Society, Inc., 2012; Official Site of the Ocean City Maryland Convention and Visitors Bureau and Department of Tourism, 2011).

Ocean City hosts several events throughout the year, including: the White Marlin Festival and Crab Cookoff, Sunfest, and Winefest on the Beach (Official Site of the Ocean City Maryland Convention and Visitors Bureau and Department of Tourism, 2011).

5. Coastal Amenities

The Ocean City shoreline offers 10 miles of free public beach and a three-mile boardwalk. The beach is highly developed, bordered by hotels, condominiums, and businesses. In addition to the beach and boardwalk, Ocean City also offers its visitors entertainment in the form of museums, amusement parks, shopping, and restaurants (Greater Ocean City Area Chamber of Commerce, 2012).

There are no national parks or wildlife refuges in Ocean City, nor is there any federally protected land. Ocean City houses five yacht clubs and three main marinas with 75 percent of Ocean City's charter boats (Greater Ocean City Area Chamber of Commerce, 2012; National Marine Fisheries Service, 2012).

6. General Economic Situation

The U.S. Census Bureau listed 1,077 business establishments in Ocean City in 2009 (U.S. Census Bureau, 2009). The six major employers: Harrison Group (hotels), Phillips (seafood restaurants), Bayshore Development (hotels, amusements), OC Seacrets, Inc. (night club), KTG LLC (restaurants), and Clarion Resort Fountainbleu (hotels) (National Marine Fisheries Service, 2012).

7. Coastal Tourism/Recreation Activity

Ocean City is an ideal destination for tourists who enjoy fishing, swimming, and lounging on the beach, as well as tourist looking for an abundance of entertainment options. Ocean City provides visitors with recreation in many forms, including a laser tag arena, two amusement parks, 20 golf courses, a Ripley's Believe it or Not! Museum, and numerous shops and restaurants. For tourists who prefer nature-oriented activities, Ocean City offers parasailing trips and nature cruises, as well as kayaks and canoes for rent (Greater Ocean City Area Chamber of Commerce, 2012).

According to the National Oceanic and Atmospheric Administration, 89.3 percent of the ocean-related jobs in Ocean City are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism accounted for \$1,204.8 million in sales, \$290.7 million in labor income, and 9,489 total jobs in 2010 (Tourism Economics, 2010). There are 341 establishments dedicated to leisure and hospitality alone in Ocean City (U.S. Bureau of Labor Statistics, 2010). Approximately 71.5 percent of ocean recreation and tourism businesses in Ocean City are small (U.S. Census Bureau, 2009).²

Ocean City is located in Worcester County, where, in 2009, 463 ocean-related establishments directly employed 6,806 people. This reflects a marked increase from 2000, when 106 establishments employed 1,027 people. From 2000 to 2009, the number of ocean-related establishments grew by 336.8 percent and the employment associated with these establishments grew by 562.7 percent in the County (National Ocean Economics Program, 2012).

There are approximately 95 hotels, two bed and breakfasts, and eight campgrounds in Ocean City (Greater Ocean City Area Chamber of Commerce, 2012). In 2010, the hotel tax generated \$11,226,904 in revenue (Town of Ocean City, Maryland Finance Department, 2010). According to U.S. Census Bureau data, 74.2 percent of all houses in Ocean City are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

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² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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Queen Anne's County, Maryland

1. Synopsis

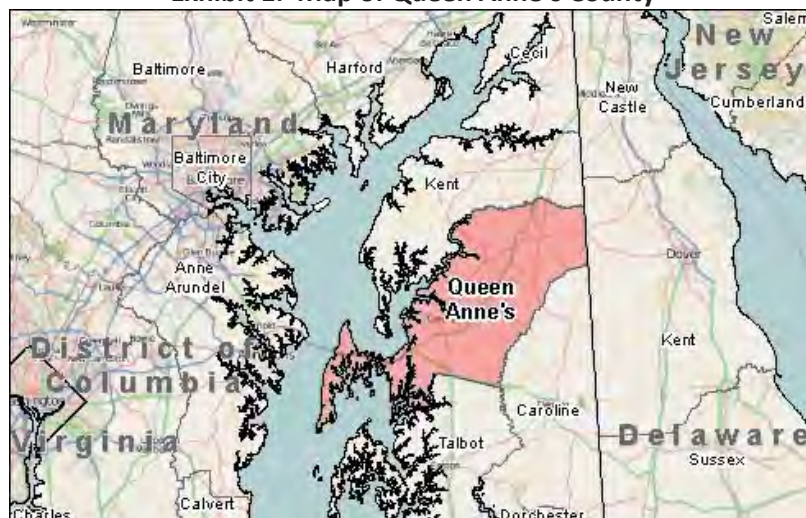
Queen Anne's County is located on the eastern side of the Chesapeake Bay in Maryland. The County is known for its scenic landscapes, relaxing waterfront, and commitment to its agricultural heritage. Queen Anne's County is comprised of eight incorporated towns and numerous unincorporated communities. The County is home to almost 48,000 people, with a population density less than the state average (U.S. Census Bureau, 2010). The County's largest industries include trade, transportation, utilities, and agriculture; Queen Anne's County ranks first in the state in the production of corn, soybeans, and wheat. Other major industries include professional services, as well as leisure and hospitality (Maryland Department of Business & Economic Development, 2012).

Tourism represents a significant portion of the ocean economy in Queen Anne's County. In 2009, 145 establishments in the ocean economy employed 2,395 people (National Ocean Economics Program, 2012). The National Oceanic and Atmospheric Administration reported that 89.3 percent of these ocean-related jobs were related to tourism (National Oceanic and Atmospheric Administration, 2012). According to the U.S. Census Bureau, approximately 62.2 percent of ocean recreation and tourism businesses in Queen Anne's County are small (U.S. Census Bureau, 2009).¹

2. Location

Queen Anne's County, shown in Exhibit 1, is located on the eastern side of the Chesapeake Bay in Maryland. Adjacent counties include Kent County (to the north), Talbot County (to the south), Caroline County (to the southeast), and Anne Arundel County (to the west) in Maryland and Kent County, Delaware (to the east) (Google, Inc., 2012). Queen Anne's County lies within a two-hour drive of major urban centers such as Philadelphia, Baltimore, and Washington, DC (Maryland Department of Business & Economic Development, 2012). It has a land area of 372 square miles and 414 miles of winding shoreline (Maryland Department of Business & Economic Development, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Queen Anne's County



¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Source: ESRI, 2011 and OpenStreetMap, 2011.

Queen Anne’s County is primarily accessible by car. It is served by several U.S. Routes 50 and 301, as well as Maryland Route 404. The Chesapeake Bay Bridge links the County to Anne Arundel County on the western shore of the Bay (Google, Inc., 2012). To reach Queen Anne’s by air travel, visitors can fly into Baltimore-Washington International, Ronald Reagan Washington National, Washington Dulles International, and Philadelphia International Airports, all located within a couple of hours by car (Maryland Department of Business & Economic Development, 2012).

3. Demographics

Queen Anne’s County has a year-round population of 47,798 (U.S Census Bureau, 2010). The following three tables profile Queen Anne’s County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, at 17.8 percent, population growth in Queen Anne’s County has outpaced the state population growth (9.0 percent) in the past decade.

Exhibit 2. Population Profile

	Queen Anne's	Maryland
Year-Round Population	47,798	5,296,486
Population Change (2000-2010)	17.8%	9.0%
Median Age (Years)	42.6	38
Percent Female	50.3%	13.2%
Percent Foreign Born	3.4%	51.6%
<i>Ethnic Profile</i>		
White	88.7%	58.2%
Black/African American	6.9%	29.4%
Asian	1.0%	5.5%
Hispanic/Latino	3.0%	8.2%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Queen Anne's	Maryland
Unemployment Rate	5.2%	6.6%
Percent Out of Labor Force	30.4%	30.4%
Median Household Income	\$81,096	\$70,647
Percent of Pop. Below Poverty Line	5.5%	8.6%
<i>Educational Attainment</i>		
High School Diploma	30.4%	26.3%
Bachelor's Degree	18.2%	19.7%
Graduate/Professional Degree	11.4%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Queen Anne's	Maryland
Population Density (people/sq. mile)	128.5	594.8
Housing Density (structures/sq. mile)	54.2	218.5
Housing Structures that are Independent Units	84.0%	51.6%
Occupied Units	89.5%	90.1%
Properties for Seasonal, Rec. or Occasional Use	4.1%	2.3%
Median House Value	\$375,700	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to settlement by Europeans, the Matapeake tribe lived in Queen Anne's County. In the early and mid-1600s, Europeans began exploring the Chesapeake Bay and forming settlements along the shore. The English established a trading post on Kent Island in Queen Anne's County in order to trade with the local tribe (Ruffner, 2012). The communities grew through the century until the population reached 3,000 in the early 1700s; Queen Anne's County was officially founded in 1706.

The economy shifted from tobacco to grain farming in the mid-1700s and was bolstered by the introduction of farming machinery and railroad infrastructure in the mid-1800s (Queen Anne's County, Maryland Tourism Office, 2012b). The County continues to be a primary agricultural producer in the mid-Atlantic. Queen Anne's County ranks first in the state in the production of corn, soybeans, and wheat (Queen Anne's County, Maryland Tourism Office, 2012a).

5. Coastal Amenities

Queen Anne's County offers 414 miles of scenic shoreline, with one public beach (Maryland Department of Business & Economic Development, 2012). There are no national parks or wildlife refuges, nor is there any federally protected land (U.S. National Park Service, 2012). However, Queen Anne's County has preserved about 70,000 acres through County preservation programs (Queen Anne's County, Maryland Tourism Office, 2012a). The County has approximately 10 marinas and boatyards and five yacht clubs (U.S. Census Bureau, 2009).

Historically significant coastal features include: the Waterman's Monument that recognizes the importance of the fishing industry to Queen Anne's history and the Kent Island tradeport, one of the first European settlements in the United States (Queen Anne's County, Maryland Tourism Office, 2012c).

6. General Economic Situation

The U.S. Census Bureau listed 1,403 business establishments in Queen Anne's County in 2009 (U.S. Census Bureau, 2009). According to the Maryland Department of Business and Economic Development, the five largest employers in the County in 2011 were: Chesapeake College, S.E.W. Friel, Paul Reed Smith Guitars, Safeway, and River Plantation Resort. As the largest employer, Chesapeake College employs 489 people, followed by S.E.W. Friel with 275 employees and Paul Reed Smith Guitars with 244 employees (Maryland Department of Business & Economic Development, 2012).

7. Coastal Tourism/Recreation Activity

Tourism in Queen Anne's County is oriented toward the County's natural beauty and rural, agricultural heritage. Visitors can partake in a variety of recreational activities, including: birdwatching, hiking, biking, kayaking, wine tasting, and antiques shopping. Historical tours transport visitors back in time to learn about the region's settlement and early tobacco industry.

Marinas in the area tend to be more functional than tourism-based. That said, tourists can observe the “old workboats putter out of fog-shrouded marinas at dawn.” Queen Anne’s County offers a tranquil, rural setting for vacationers (Maryland Office of Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, 89.3 percent of the ocean-related jobs in Queen Anne’s are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism—coastal and otherwise—accounted for \$106.1 million in sales and \$61.4 million in labor income, while supporting 1,621 jobs (Tourism Economics, 2011). There are 122 establishments dedicated to leisure and hospitality in Queen Anne’s County; the average weekly wage for employees of these establishments is \$330. Leisure and hospitality employment in Queen Anne’s County increased by 683 jobs, or by only 33.8 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). According to the U.S. Census Bureau, approximately 62.2 percent of ocean recreation and tourism businesses in Queen Anne’s County are small (U.S. Census Bureau, 2009).²

In 2009, 145 ocean-related establishments directly employed 2,395 people in Queen Anne’s County. This reflected an increase from 2000, when 58 establishments employed 1,196 people. From 2000 to 2009, the number of ocean-related establishments grew by 150.0 percent and the employment associated with these establishments grew by 100.3 percent (National Ocean Economics Program, 2012).

There are approximately seven hotels, nine bed and breakfasts, and three campgrounds in Queen Anne’s County (Queen Anne’s County, Maryland Tourism Office, 2012d; U.S. Census Bureau, 2009). In 2011, the hotel room occupancy tax generated \$441,123 in revenue for the County (Queen Anne’s County, Maryland Finance Office, 2011). About four percent of all houses in Queen Anne’s County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The water sightseeing, marinas, and hotel industries are also present in Queen Anne’s County. In fact, the employment in the marinas industry has grown by 89.3 percent since 2005.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Queen Anne’s County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	6	0	15	-**
Marinas (713930)	110	244	159	89.3%
Boat Building and Repair (336612)	-	-	-	-^
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	140	157	153	-**
Restaurant Employment (7221 & 7222)	1,454	1,867	1,697	7.7%
Amusement, Gambling, Other Recreation (713)	271	516	384	33.8%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Somerset County, Maryland

1. Synopsis

Somerset County is located along the eastern shore of the Chesapeake Bay in Maryland. Somerset is known for its undeveloped countryside and its rural traditions – it also has more historic buildings and sites per capita than any other county in Maryland. Somerset consists of two incorporated municipalities, Crisfield and Princess Anne, and numerous unincorporated areas (Somerset County Tourism, 2012). The County has a relatively small population of 26,470 people and a population density of about 83 people per square mile. Its housing density is similarly low, at 35 units per square mile (U.S. Census Bureau, 2010). The seafood and poultry processing and agricultural industries provide the County’s economic base (Maryland Department of Business & Economic Development, 2012).

Tourism represents a significant portion of the ocean economy in Somerset County. In 2009, 60 establishments in the ocean economy directly employed 508 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 75.6 percent of the ocean-related jobs in Somerset County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). All of the ocean recreation and tourism-related businesses (100 percent) in Somerset County are small (U.S. Census Bureau, 2009).¹

2. Location

Somerset County, shown in Exhibit 1, is Maryland’s southernmost county, located along the eastern shore of the Chesapeake Bay. Somerset shares a border with Wicomico County (to the north) and Worcester County (to the east) in Maryland and Accomack County, Virginia (to the south) (Google, Inc., 2012). It lies approximately 115 miles from Baltimore, 125 miles from Washington, DC, and 145 miles from Philadelphia (Maryland Department of Business & Economic Development, 2012). The County has a land area of 320 square miles (U.S. Census Bureau, 2010). There are 1,106 miles of shoreline (Maryland Department of Business & Economic Development, 2012).

Exhibit 1. Map of Somerset County



¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Source: ESRI, 2011 and OpenStreetMap, 2011.

Somerset County is primarily accessible by car on Interstate Highway Route 13 (Google, Inc., 2012). For those traveling by air, the Salisbury-Ocean City Wicomico Regional Airport is located 16 miles away from Somerset's County seat, Princess Anne (Maryland Department of Business & Economic Development, 2012).

3. Demographics

Somerset County has a year-round population of 26,470 (U.S. Census Bureau, 2010). The following three tables profile Somerset County's population. As Exhibit 2 shows, the population has grown by 7.0 percent in the past decade, which is a slightly lower rate than the state growth rate (9.0 percent).

Exhibit 2. Population Profile

	Somerset	Maryland
Year-Round Population	26,470	5,296,486
Population Change (2000-2010)	7.0%	9.0%
Median Age (Years)	36.5	38
Percent Female	46.6%	13.2%
Percent Foreign Born	3.9%	51.6%
<i>Ethnic Profile</i>		
White	53.5%	58.2%
Black/African American	42.3%	29.4%
Asian	0.7%	5.5%
Hispanic/Latino	3.3%	8.2%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Somerset	Maryland
Unemployment Rate	7.8%	6.6%
Percent Out of Labor Force	54.1%	30.4%
Median Household Income	\$42,443	\$70,647
Percent of Pop. Below Poverty Line	18.6%	8.6%
<i>Educational Attainment</i>		
High School Diploma	45.2%	26.3%
Bachelor's Degree	9.8%	19.7%
Graduate/Professional Degree	4.5%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Somerset	Maryland
Population Density (people/sq. mile)	82.8	594.8
Housing Density (structures/sq. mile)	34.8	218.5
Housing Structures that are Independent Units	70.4%	51.6%
Occupied Units	79.0%	90.1%
Properties for Seasonal, Rec. or Occasional Use	7.8%	2.3%
Median House Value	\$155,900	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The first European settlers arrived in present-day Somerset County in 1657, where they encountered the resident Nanticoke, Manokin, and Rockawakinmany tribes. Over time, the tribes' presence in the area diminished because of aggression, restrictive trading, and the development of plantations that consumed their subsistence farmland (Richardson, 2012).

Somerset County was officially founded in 1666 by Cecil Calvert, proprietor of Maryland County. It was named after his wife's sister, Lady Mary Somerset. The original land area was divided in 1742 and again in 1867 to form Worcester County and Wicomico County, respectively (Maryland State Archives, 2011).

Since that time, Somerset County has continued to develop its agricultural industry and has introduced related industries, like processing and canning, to its economy (Maryland Department of Business & Economic Development, 2012).

Somerset County organizes a variety of community events. These include: the Delmarva Birding Weekend, Somerset Strawberry Festival, J. Millard Tawes Crab and Clam Bake, 1812 Heritage Festival, Waterman's Folklife Festival, Terrapin Sands Fish Fry, and Native American Indian Heritage Festival and Pow-wow (Maryland Department of Business & Economic Development, 2012; Somerset County Tourism, 2012).

5. Coastal Amenities

Somerset County has 1,106 miles of shoreline along the Chesapeake Bay (Maryland Department of Business & Economic Development, 2012). Its landscape consists of fields, marshes, and slow tidal tributaries. Although there are no national parks or wildlife refuges, the State of Maryland has committed to preserving the Deal Island Wildlife Management Area in the northwest of the County, covering 13,000 acres (Somerset County Tourism, 2012). There is one public beach in Somerset County, one marina, and four yacht clubs (U.S. Census Bureau, 2009).

Somerset County is home to Smith Island, Maryland's only offshore island in the Chesapeake Bay accessible only by boat. Deal Island is another island destination in Somerset. For much of its history, it was known as "Devil's Island" because early settlers were shipwrecked on its shores; it is also famous for having served as a pirate's hideout. Today, Deal Island hosts several local festivals, including the Labor Day Skipjack Races and Land Festival (Somerset County Tourism, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 385 business establishments in Somerset County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the University of Maryland Eastern Shore (UMES), Sysco Eastern Maryland, McCreedy Memorial Hospital, Rubberset, and Somerset Community Services. As of 2011, the largest employer, UMES, had 929 employees, followed by Sysco Eastern Maryland, with 750 employees (Maryland Department of Business & Economic Development, 2012).

Within Somerset County, Smith Island is almost entirely dependent on crabbing, as soil erosion has reduced the inhabitants' ability to farm. On Deal Island, residents make a living through ship building, sail making, and fishing (Somerset County Tourism, 2012).

7. Coastal Tourism/Recreation Activity

Tourism in Somerset County consists primarily of nature-oriented activities. The Somerset County Commissioner dubs the County a “paradise for hunters, fishermen, photographers, kayakers, and nature lovers.” The County Tourism Office provides a list of suggested activities for tourists that includes birdwatching, boating (including cruises, ferries, kayaks, fishing, and charters), camping, cycling, golfing, hunting, shopping, and historic sightseeing (Somerset County Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 75.6 percent of the ocean-related jobs in Somerset County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, the tourism economy in Somerset County generated \$54.7 million in sales, with \$23.4 million in labor income and 850 jobs (Tourism Economics, 2011). There are 44 establishments dedicated to leisure and hospitality in Somerset County; the average weekly wage for employees of these establishments is \$192. Leisure and hospitality employment in Somerset County increased by 113 jobs, or 32.94 percent, from winter to summer in 2010, which reflects the somewhat seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 100 percent of ocean recreation and tourism-related businesses in Somerset County are small (U.S. Census Bureau, 2009).²

In 2009, 60 ocean-related establishments directly employed 508 people in Somerset County. This reflected a change from 2000, when 55 establishments employed 635 people. From 2000 to 2009, the number of ocean-related establishments grew by a modest 9.1 percent and the employment associated with these establishments decreased by 20.0 percent (National Ocean Economics Program, 2012).

There are approximately seven hotels, seven bed and breakfasts, and five campgrounds in Somerset County (U.S. Census Bureau, 2009). In the Fiscal Year ending in 2012, visitor accommodations grossed \$50,000 in room occupancy tax revenue (Maryland Association of Counties, 2012). About 7.8 percent of all houses in Somerset County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry; the data reflect the seasonal nature of this industry. The water sightseeing and the amusement, gambling, and other recreation industries have a small presence, as well.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Somerset County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	3	-50.0%
Marinas (713930)	0	0	0	- [^]
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	0	0	0	- ^{**}
Restaurant Employment (7221 & 7222)	321	425	401	36.9%
Amusement, Gambling, Other Recreation (713)	0	0	8	- ^{**}
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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St. Mary's County, Maryland

1. Synopsis

St. Mary's County, the oldest in Maryland, is located along the western shore of the Chesapeake Bay in Southern Maryland. St. Mary's County is a short drive to major urban centers like Annapolis, Baltimore, and Washington, DC (St. Mary's County Division of Tourism, 2012). It is comprised of one incorporated town, Leonardtown, and a collection of unincorporated areas. St. Mary's County is home to 105,151 people, with a population and housing density of 294 people and 116 units per square mile, respectively (U.S. Census Bureau, 2010). The County is known for its religious and military history and its prominence for advanced aerospace and maritime aviation technologies (Maryland Department of Business & Economic Development, 2012). St. Mary's is the fastest growing region in the state, in terms of technology-related jobs (St. Mary's County Division of Tourism, 2012).

Tourism represents a significant portion of the ocean economy in St. Mary's County. In 2009, 190 ocean-related establishments directly employed 2,744 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 96.9 percent of the ocean-related jobs in St. Mary's County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). The majority (65.96 percent) of ocean recreation and tourism-related establishments in the County are small (U.S. Census Bureau, 2009).¹

2. Location

St. Mary's County, shown in Exhibit 1, is located on St. Mary's Peninsula in Southern Maryland. The Chesapeake Bay and Patuxent River border the peninsula on the east; the Potomac and Wicomico Rivers lie on the peninsula's western side. Adjacent to St. Mary's County are Calvert County (to the northeast) and Charles County (to the northwest) (Google, Inc., 2012). It is located 70 miles from Annapolis, 80 miles from Baltimore, and 54 miles from Washington, DC (St. Mary's County Division of Tourism, 2012). The County covers 357 square miles of land, with a shoreline that is 536 miles long (Maryland Department of Business & Economic Development, 2012; U.S. Census Bureau, 2010).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 1. Map of St. Mary's County



Source: ESRI, 2011 and OpenStreetMap, 2011.

St. Mary's County is accessible by car, bus, and plane. Maryland State Route 5 enters the County from Charles County to the north (Google, Inc., 2012). The St. Mary's Transit system covers bus routes throughout the County and St. Mary's County Regional Airport is located only four miles from Leonardtown (St. Mary's County Department of Public Works and Transportation, 2012).

3. Demographics

St. Mary's County has a year-round population of 105,151 (U.S. Census Bureau, 2010). The following three tables profile St. Mary's County's population. As Exhibit 2 shows, at 22.0 percent, population growth in St. Mary's County has significantly outpaced the state growth rate (9.0 percent) in the past decade.

Exhibit 2. Population Profile

	St. Mary's	Maryland
Year-Round Population	105,151	5,296,486
Population Change (2000-2010)	22.0%	9.0%
Median Age (Years)	36	38
Percent Female	50.2%	51.2%
Percent Foreign Born	3.8%	11.6%
<i>Ethnic Profile</i>		
White	78.6%	58.2%
Black/African American	14.3%	29.4%
Asian	2.5%	5.5%
Hispanic/Latino	3.8%	8.2%
American Indian	0.4%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	St. Mary's	Maryland
Unemployment Rate	4.6%	6.6%
Percent Out of Labor Force	29.6%	30.4%
Median Household Income	\$80,053	\$70,647
Percent of Pop. Below Poverty Line	7.1%	8.6%
<i>Educational Attainment</i>		
High School Diploma	32.8%	26.3%
Bachelor's Degree	17.3%	19.7%
Graduate/Professional Degree	10.0%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	St. Mary's	Maryland
Population Density (people/sq. mile)	294.4	594.8
Housing Density (structures/sq. mile)	115.6	218.5
Housing Structures that are Independent Units	73.9%	51.6%
Occupied Units	91.1%	90.1%
Rental Properties	3.0%	2.3%
Median House Value	\$327,800	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

In 1634, the first English settlers arrived at St. Clement’s Island in St. Mary’s County. The day of their arrival is celebrated as Maryland Day. With its founding in 1637, St. Mary’s became Maryland’s first county (Maryland State Archives, 2012).

The first colonists of St. Mary’s County were interested in the fur trade but realized that this livelihood could not support the colony. The Yaocomaco Indians living in the area taught the English colonists how to grow tobacco. Thus, St. Mary’s original economy developed around the tobacco industry. Fishing, crabbing, and oyster harvesting were also important economic activities. However, the economy has diversified over time. St. Mary’s is now known for its innovative military and other technologies (Shoemaker, 2003).

St. Mary’s County has a unique and significant religious history. The County provided a haven for English settlers fleeing religious persecution. It houses a monument honoring the Maryland Toleration Act, granting religious freedom for any Christian sects in 1649. The first Catholic Mass in the original thirteen colonies took place in St. Mary’s County. Today, St. Mary’s is home to both Amish and Mennonite communities (Maryland Office of the Register of Wills, 2012).

The County was also the site of many important military events, including fighting in the Maryland Revolution of 1689, British raids in the War of 1812, and Union troop occupation and Confederate imprisonment during the Civil War. In 1943, the Patuxent Naval Air Station was constructed in St. Mary’s. The Station served as a center for aviation technology development and testing. It was here that the first astronauts in the United States learned to fly above the Bay (Shoemaker, 2003).

St. Mary’s County hosts several local festivals throughout the year. These include: the Potomac Jazz and Seafood Festival, the River Convert Series, the Riverside Winefest, the Crab Festival, and the Oyster

Festival, which includes a national oyster shucking competition (Maryland Department of Business & Economic Development, 2012; St. Mary's County Division of Tourism, 2012).

5. Coastal Amenities

St. Mary's County has 536 miles of shoreline along the Chesapeake Bay and the Patuxent, Potomac, and Wicomico Rivers (Maryland Department of Business & Economic Development, 2012). There are six public beaches, one harbor, six marinas, and five yacht clubs in the County (St. Mary's County Division of Tourism, 2012; U.S. Census Bureau, 2009). There are no national parks or wildlife refuges and no federally protected land (U.S. National Park Service, 2012), but there are five state parks and 22 county parks in the area (Maryland Department of Business & Economic Development, 2012).

St. Mary's coast is dotted with historic landmarks. These include: St. Clement's Island, where the first English settlers landed in Maryland; Sotterley Plantation; four lighthouses, including the oldest lighthouse on the Potomac River; and Maryland's only historic shipwreck dive preserve (Maryland Department of Business & Economic Development, 2012; St. Mary's County Division of Tourism, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 1,911 business establishments in St. Mary's County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Patuxent River Naval Air Station, DynCorp International, St. Mary's Hospital, Wyle, and BAE Systems. Three of these employers provide technical research, products, and services. As the largest employer, the Patuxent River Naval Air Station supports roughly 11,000 employees (Maryland Department of Business & Economic Development, 2012).

7. Coastal Tourism/Recreation Activity

Tourism in St. Mary's County consists primarily of historical and cultural sightseeing. The County's Tourism Office lists several key sites, such as St. Clement's Island and its museum, Historic St. Mary's City, Sotterley Plantation, Piney Point Lighthouse, and the Confederate Soldiers' Monument. For a bit of more recent history, tourists can go to the Patuxent River Naval Air Museum.

To experience the culture of St. Mary's County, the Tourism Office suggests walking around the old town squares, visiting the wineries, exploring the local art studios, and driving through the back roads to meet "friendly folks inspired by the history and landscapes that surround them." St. Mary's also offers several nature-oriented activities, including kayaking, buggy racing, biking, and camping (St. Mary's County Division of Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 96.9 percent of the ocean-related jobs in St. Mary's County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, the tourism economy in St. Mary's County generated \$125.0 million in sales, with \$60.0 million in labor income and 1,964 jobs (Tourism Economics, 2011). There are 208 establishments dedicated to leisure and hospitality in St. Mary's County; the average weekly wage for employees of these establishments is \$256. Leisure and hospitality employment in St. Mary's County increased by 365 jobs, or 11.72 percent, from winter to summer in 2010, which reflects the somewhat seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 65.96 percent of ocean recreation and tourism-related businesses in St. Mary's County are small (U.S. Census Bureau, 2009).²

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

In 2009, 190 ocean-related establishments directly employed 2,744 people in St. Mary's County. This reflected an increase from 2000, when 102 establishments employed 1,528 people. From 2000 to 2009, the number of ocean-related establishments grew by 86.3 percent and the employment associated with these establishments increased by 79.6 percent (National Ocean Economics Program, 2012).

There are approximately 14 hotels, 12 bed and breakfasts, and seven campgrounds in St. Mary's County (St. Mary's County Division of Tourism, 2012). In Fiscal Year 2012, visitor accommodations grossed about \$750,000 in room occupancy tax revenue (Maryland Association of Counties, 2012). Three percent of all houses in St. Mary's County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry and the hotel industry; the data reflect their seasonal nature. The industries related to marinas, boat dealers, and travel agencies are also present.

Exhibit 5. St. Mary's County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	29	51	42	-10.6%
Boat Building and Repair (336612)	-	-	-	-^
Boat Dealers (441222)	16	17	16	0%
Renting Pleasure Boats (532292)	-	-	-	-^
Land-Based				
Hotel Employment (72111)	160	168	163	-**
Restaurant Employment (7221 & 7222)	2,526	2,808	2,767	10.6%
Amusement, Gambling, Other Recreation (713)	210	294	245	-10.3%
General Tourism				
Travel Agencies (561510)	24	23	23	-8.0%
Tour Operators (561520)	-	-	-	-^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Talbot County, Maryland

1. Synopsis

Talbot County is located on the eastern shore of the Chesapeake Bay in Maryland. The County is known for its picturesque hamlets and its seafood, sailing, and waterfowl sporting activities. Talbot County is comprised of five incorporated towns and numerous unincorporated areas (Maryland Department of Business & Economic Development, 2012). Almost 38,000 people reside in Talbot, which has a population density of 141 people per square mile and a housing density of 73 units per square mile (U.S. Census Bureau, 2010). A diverse set of industries makes up Talbot's economy, including manufacturing, agriculture, professional services, and healthcare services (Maryland Department of Business & Economic Development, 2012).

Tourism represents a significant portion of the ocean economy in Talbot County. In 2009, 171 ocean-related establishments directly employed 2,269 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 95.5 percent of the ocean-related jobs in Talbot County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the 171 ocean recreation and tourism-related businesses in Talbot County, 65.7 percent of are small (U.S. Census Bureau, 2009).¹

2. Location

Talbot County is located on the eastern shore of the Chesapeake Bay in Maryland. Adjacent counties include Queen Anne's County (to the north), Caroline County (to the east), and Dorchester County (to the south) (Google, Inc., 2012). The County has 269 square miles of land and 605 miles of shoreline along the Chesapeake Bay and five river systems (Eye, Miles, Tred Avon, Choptank, and Tuckahoe) (Maryland Department of Business & Economic Development, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Talbot County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Talbot County is primarily accessible by car. U.S. Route 50 bisects the County, running from north to south. Routes 333, 33, 331, and 328 connect riders to other parts of the County (Google, Inc., 2012). Travel by plane and train is also possible; the County airport located in Easton offers charter service to Washington, DC and Baltimore, and shuttle service to Baltimore/Washington International Thurgood Marshall Airport and Amtrak (Maryland Department of Business & Economic Development, 2012).

3. Demographics

Talbot County has a year-round population of 37,782 (U.S. Census Bureau, 2010). The following three tables profile Talbot County's population. As Exhibit 2 shows, at 11.7 percent, population growth in Talbot County has outpaced the state growth rate of 9.0 percent in the past decade.

Exhibit 2. Population Profile

	Talbot	Maryland
Year-Round Population	37,782	5,296,486
Population Change (2000-2010)	11.7%	9.0%
Median Age (Years)	47.4	38
Percent Female	52.3%	13.2%
Percent Foreign Born	4.5%	51.6%
<i>Ethnic Profile</i>		
White	81.4%	58.2%
Black/African American	12.8%	29.4%
Asian	1.2%	5.5%
Hispanic/Latino	5.5%	8.2%
American Indian	0.2%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Talbot	Maryland
Unemployment Rate	6.1%	6.6%
Percent Out of Labor Force	37.0%	30.4%
Median Household Income	\$63,017	\$70,647
Percent of Pop. Below Poverty Line	6.1%	8.6%
<i>Educational Attainment</i>		
High School Diploma	27.7%	26.3%
Bachelor's Degree	17.1%	19.7%
Graduate/Professional Degree	15.6%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Talbot	Maryland
Population Density (people/sq. mile)	140.7	594.8
Housing Density (structures/sq. mile)	72.9	218.5
Housing Structures that are Independent Units	78.5%	51.6%
Occupied Units	82.5%	90.1%
Properties for Seasonal, Rec. or Occasional Use	9.6%	2.3%
Median House Value	\$352,400	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

English settlers arrived in the area of present-day Talbot County in the mid-1600s. Among the early settlers was a colony of Quakers. (The Quakers' Third Haven Meeting House in Easton is recognized as Maryland's earliest dated building and the nation's oldest religious building still in use (Talbot County Government, 2006b). Talbot County was officially founded in the 1660s and named after Lady Grace Talbot, the sister of Maryland Colony proprietor, Cecil Calvert (Maryland State Archives, 2011).

Before settlement by the Europeans, Talbot County was home to the Choptank tribe. The English colonial government established reservation land for the Choptank people in 1669; they retained the land until the State of Maryland sold it in 1822.

Talbot was the location of fighting during both the American Revolution and War of 1812 (Maryland State Archives, 2011).

From its early development, Talbot County has developed a tradition of diverse economic activity, including boat building, oystering and crabbing, visual arts, educational services, and medical services.

Talbot County hosts several annual festivals, including: the Waterfowl Festival, Waterman's Appreciation Day, Chesapeake Folk Festival, Tilghman Island Seafood Festival, St. Michael's Food and Wine Festival, and Tuckahoe Steam and Gas Show (Maryland Department of Business & Economic Development, 2012; Maryland Office of Tourism, 2012).

5. Coastal Amenities

Talbot County has over 600 miles of shoreline along the Chesapeake Bay and five rivers (Talbot County Chamber of Commerce, 2012). There is one public beach, one harbor, 12 marinas, and eight yacht clubs in the County (Talbot County Government, 2006b; U.S. Census Bureau, 2009). There are no national parks or wildlife refuges and no federally protected land (U.S. National Park Service, 2012).

Talbot County offers three historic port towns, including one on Tilghman Island, with three miles of coastal lowland (Talbot County Chamber of Commerce, 2012; The Talbot County Office of Tourism, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 1,556 business establishments in Talbot County in 2009 (U.S. Census Bureau, 2009). The five largest employers in the County in 2011, excluding government employers, were: Shore Health System, Shore Bancshares, Harim USA, William Hill Manor, and Walmart. Two of these companies provide medical services. As the largest employer, Shore Health System supports 2,100 jobs, followed by Shore Bancshares with 320 employees, and Harim USA, with 307 employees (Maryland Department of Business & Economic Development, 2012).

7. Coastal Tourism/Recreation Activity

Talbot County offers a low-key tourism experience. It has small towns and undeveloped coastal landscapes. For example, Tilghman Island offers three miles of lowland bordered by the Chesapeake Bay and Choptank River. The town of Oxford, with its historic homes, lies on the boat-filled Tred Avon River. St. Michaels has historic architecture, including shipbuilders' cottages and Victorian homes, complemented by "critically-acclaimed" restaurants, shopping, and spas. Easton is Talbot's largest town; with shopping and art galleries (The Talbot County Office of Tourism, 2012).

Activities in Talbot County include water sports, biking, golf, tennis, hunting, and skating. Boat rentals, sightseeing vessels, and fishing charters are available for exploring the Chesapeake Bay (Talbot County Chamber of Commerce, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 95.5 percent of the ocean-related jobs in Talbot County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, the tourism economy in Talbot County generated \$169.4 million in sales, with \$84.1 million in labor income and 2,367 jobs (Tourism Economics, 2011). There are 163 establishments dedicated to leisure and hospitality in Talbot County; the average weekly wage for employees of these establishments is \$349. Leisure and hospitality employment in Talbot County increased by 703 jobs, or 33.11 percent, from winter to summer in 2010, which reflects the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 65.7 percent of ocean recreation and tourism-related businesses in Talbot County are small (U.S. Census Bureau, 2009).²

In 2009, 171 ocean-related establishments directly employed 2,269 people in Talbot County. This reflected an increase from 2000, when 110 establishments employed 1,713 people. From 2000 to 2009, the number of ocean-related establishments grew by 55.5 percent and the employment associated with these establishments grew by 32.5 percent (National Ocean Economics Program, 2012).

There are approximately 17 hotels, 35 bed and breakfasts, and no campgrounds in Talbot County (U.S. Census Bureau, 2009). Visitor accommodations gross about \$975 thousand per year in room occupancy tax revenue (Maryland Association of Counties, 2012). About 9.6 percent of all houses in Talbot County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, which has grown by 10.3 percent since 2005. The amusement, gambling, and other recreation industry and the hotel industry also have a significant presence in the County; marinas and boat dealers also provide employment. The U.S. Bureau of Labor Statistics data reflect seasonal nature of these industries. The industries related to marinas, boat dealers, and travel agencies are also present.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Talbot County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	28	37	31	-**
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	29	50	41	5.1%
Renting Pleasure Boats (532292)	-	-	-	-^
Land-Based				
Hotel Employment (72111)	296	409	355	-22.5%
Restaurant Employment (7221 & 7222)	1,460	1,806	1,656	10.3%
Amusement, Gambling, Other Recreation (713)	155	320	228	-4.6%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Worcester County, Maryland

1. Synopsis

Worcester County is located in the southeasternmost corner of Maryland. The County is known for its seafood, many options for outdoor recreation, sandy beaches at Ocean City, and wild horses that roam Assateague Island. Worcester County is comprised of one incorporated city and three incorporated towns, as well as numerous unincorporated areas. Over 51,000 people call Worcester home; the County has a population density of 110 people per square mile and a housing density of 119 units per square mile (U.S. Census Bureau, 2010). Key industries in Worcester County include poultry processing and tourism (Maryland Department of Business & Economic Development, 2012).

Tourism represents a significant portion of the ocean economy in Worcester County. In 2009, 463 ocean-related establishments directly employed 6,806 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 99.1 percent of the ocean-related jobs in Worcester County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the 463 ocean recreation and tourism-related businesses in Worcester County, 71.4 percent are small (U.S. Census Bureau, 2009).¹

2. Location

Worcester County, see Exhibit 1, is located in the southeasternmost corner of Maryland. It lies 120 miles from Baltimore, 132 miles from Washington, DC, and 149 miles from Philadelphia (Maryland Department of Business & Economic Development, 2012). Adjacent counties include Somerset County (to the west) and Wicomico County (to the northwest) in Maryland; Accomack County, Virginia (to the south); and Sussex County, Delaware (to the north) (Google, Inc., 2012). The County has 475 square miles of land and 774 miles of shoreline along the Atlantic Ocean. Worcester includes all of Maryland's Atlantic coastline (Maryland Department of Business & Economic Development, 2012).

Exhibit 1. Map of Worcester County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Worcester County is primarily accessible by car. U.S. Route 50 spans the County's width, ending in Ocean City. Other U.S. routes cross Worcester, including Route 113, which bisects the County from north to south. Maryland Routes 90 and 12 provide links to other sections of the County. A small airport near Ocean City has limited service. Worcester County lies within a short drive of major urban centers like Pittsburgh, Philadelphia, Baltimore, and Washington, DC (Google, Inc., 2012).

3. Demographics

Worcester County has a year-round population of 51,454 (U.S. Census Bureau, 2010). The following three tables profile Worcester County's population. Exhibit 2 indicates that, at 10.6 percent, population growth in Worcester County generally mirrored that of the state (9.0 percent) over the past decade. However, as Exhibit 3 shows, the median income in Worcester County, \$55,487, is considerably lower than the state average of \$70,647.

Exhibit 2. Population Profile

	Worcester	Maryland
Year-Round Population	51,454	5,296,486
Population Change (2000-2010)	10.6%	9.0%
Median Age (Years)	48.1	38
Percent Female	51.3%	13.2%
Percent Foreign Born	4.3%	51.6%
<i>Ethnic Profile</i>		
White	82.0%	58.2%
Black/African American	13.6%	29.4%
Asian	1.1%	5.5%
Hispanic/Latino	3.2%	8.2%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Worcester	Maryland
Unemployment Rate	7.1%	6.6%
Percent Out of Labor Force	38.9%	30.4%
Median Household Income	\$55,487	\$70,647
Percent of Pop. Below Poverty Line	10.1%	8.6%
<i>Educational Attainment</i>		
High School Diploma	33.7%	26.3%
Bachelor's Degree	17.3%	19.7%
Graduate/Professional Degree	8.8%	15.9%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Worcester	Maryland
Population Density (people/sq. mile)	109.9	594.8
Housing Density (structures/sq. mile)	119.1	218.5
Housing Structures that are Independent Units	40.3%	51.6%
Occupied Units	39.9%	90.1%
Properties for Seasonal, Rec. or Occasional Use	49.5%	2.3%
Median House Value	\$289,100	\$321,400

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Worcester County, named in honor of the Earl of Worcester, was formed in 1742 from a portion of Somerset County. The first European residents of Worcester County were British and Irish immigrants. Quaker, Presbyterian, and Methodist communities influenced the County's development; in particular, the Quaker and Methodist influence encouraged a relatively large number of freed slaves to make Worcester County home.

Prior to becoming an established county, the area of present-day Worcester was inhabited by the Assateague tribe. In 1678, the State of Maryland produced a treaty ordering the tribe onto five reservations along the Pocomoke River. In the late 1600s, the largest Native American town in Maryland was located near present-day Snow Hill, Worcester. After years of tension between the Assateague and the European settlers, the Assateague eventually emigrated away from the region. Descendants now live in Ontario, Canada (Maryland State Archives, 2011).

In its early development, the economy of Worcester County depended primarily on tobacco farming. However, other counties were better suited to tobacco farming than Worcester, due to its sandy soil, and the County shifted to cultivation of wheat, corn, and livestock. Industrial activities like logging, iron smelting, and shipbuilding also contributed to Worcester's economy. With the introduction of steam-powered shipping and rail infrastructure, Worcester County was able to develop its seafood trade; subsequently, 20th-century automobiles and factory manufacturing facilitated the development of Worcester's truck farming and canning industries. The manufacturing focus evolved to poultry processing over time.

Tourism has also developed into an economic driver in Worcester County, which houses the popular tourist destination of Ocean City, as well as parts of the Assateague Island National Seashore and Chincoteague National Wildlife Refuge. Worcester County hosts several local festivals, including the Delmarva Birding Weekend and White Marlin Open (Maryland Department of Business & Economic Development, 2012).

5. Coastal Amenities

With 774 miles of shoreline, Worcester County encompasses all of Maryland's Atlantic coast (Maryland Department of Business & Economic Development, 2012). The County has three public beaches (including Ocean City's 10-mile long beach), five marinas, and eight yacht clubs (Maryland Office of Tourism, 2012; U.S. Census Bureau, 2009).

Worcester County includes popular coastal tourist destination Ocean City and parts of the Assateague Island National Seashore (almost 40,000 acres) and Chincoteague National Wildlife Refuge (420 acres in

Maryland) (U.S. National Park Service, 2012a). Assateague Island National Seashore alone attracts over 2 million visitors each year (U.S. National Park Service, 2012b).

6. General Economic Situation

The U.S. Census Bureau lists 2,178 business establishments in Worcester County in 2009 (U.S. Census Bureau, 2009). The five largest employers in the County are: Harrison Group, Atlantic General Hospital, Phillips Seafood Restaurants, Dough Roller, and O.C. Seacrets. As the largest employer, Harrison Group employs approximately 1,000 people (Maryland Department of Business & Economic Development, 2012).

7. Coastal Tourism/Recreation Activity

Worcester offers options for tourism both in natural settings, like Assateague Island, and urban environments, like Ocean City, for visitors who prefer a more developed destination.

Nature-oriented activities in Worcester County include birding, golfing, boating, camping, fishing, and hunting. According to the Maryland Department of Business and Economic Development, Worcester has the best birding in Maryland.

In Ocean City, tourists can find a myriad of options for recreation, including the boardwalk, amusement parks, a laser tag arena, restaurants, shops, and the sandy beach for sunbathers, joggers, and swimmers (Maryland Department of Business & Economic Development, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 99.1 percent of the ocean-related jobs in Worcester County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, the tourism economy in Worcester County generated \$1,204.8 million in sales, with \$290.7 million in labor income and 9,489 jobs (Tourism Economics, 2011). There are 468 establishments dedicated to leisure and hospitality in Worcester County; the average weekly wage for employees of these establishments is \$367. Leisure and hospitality employment in Worcester County increased by 8,661 jobs, or 188.04 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 71.4 percent of ocean recreation and tourism-related businesses in Worcester County are small (U.S. Census Bureau, 2009).²

In 2009, 463 ocean-related establishments directly employed 6,806 people in Worcester County. This reflected a marked increase from 2000, when 106 establishments employed 1,027 people. From 2000 to 2009, the number of ocean-related establishments grew by 336.8 percent and the employment associated with these establishments grew by 562.7 percent (National Ocean Economics Program, 2012).

The Worcester County Tourism Office lists two hotels, 11 bed and breakfasts, and seven campgrounds in the County (Worcester County Tourism, 2012). In Ocean City, however, there are about 130 hotels (Ocean City Maryland, 2012). Visitor accommodations gross about \$11.25 million per year in room occupancy tax revenue, \$11.23 million of which is generated in Ocean City (Maryland Association of

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Counties, 2012; Town of Ocean City Finance Department, 2010). Of all of the housing units in Worcester County, 49.5 percent are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and other recreation industry. The industries associated with water sightseeing and marinas also provide employment. The U.S. Bureau of Labor Statistics data reflect seasonal nature of these industries.

Exhibit 5. Worcester County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	25	12	0%
Marinas (713930)	0	279	154	-9.9%
Boat Building and Repair (336612)	-	-	-	- [^]
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	1,468	3,373	2,295	-2.3%
Restaurant Employment (7221 & 7222)	2,365	7,234	4,371	-5.5%
Amusement, Gambling, Other Recreation (713)	336	1,232	775	-11.0%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Barnstable County, Massachusetts

1. Synopsis

Barnstable County, Massachusetts is the entire land mass known as Cape Cod. The County is well-known for its miles of coastline with natural beaches that attract tourists in the summer months. Barnstable County is comprised of fifteen small towns with low population and housing densities, the most populous hub being the Town of Barnstable. The population of Barnstable County is relatively small, but swells in summer months with the influx of tourists. Barnstable County's economy is highly dependent on coastal tourism.

Tourism represents a significant portion of the ocean economy in Barnstable. According to the National Oceanic and Atmospheric Administration, 97 percent of all ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). The majority of these businesses are small: according to the U.S. Census Bureau, over 80 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 1,287 ocean-related establishments directly employed 14,240 people (National Ocean Economics Program, 2012).

2. Location

Barnstable County, shown in Exhibit 1, is a peninsula located in the Southeast corner of the state, approximately 60 miles south of Boston, Massachusetts, and approximately 60 miles east of Providence, Rhode Island (Google, Inc., 2011). Barnstable County has a land area of 393 square miles (U.S. Census Bureau, 2010a) and is bordered on the north, east and south by 550 miles of shoreline (Massachusetts Visitors Network, 2011). The western border fronts Plymouth County opposite the Cape Cod Canal.

Exhibit 1. Map of Barnstable County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Barnstable County is predominantly by car, although boat and plane infrastructure does exist. The two land access points to Barnstable County are the Sagamore Bridge and the Bourne Bridge, which both cross the Cape Cod Canal. Massachusetts Department of Transportation data states that traffic

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

crossing each bridge increases approximately 75 percent in summer months (Massachusetts Department of Transportation, Highway Division, 2011). Planes and ferries in Barnstable County predominantly serve Nantucket and Dukes Counties; the majority of flights at Barnstable Municipal Airport are between Barnstable and Nantucket Counties, and the overwhelming majority of ferries in Barnstable County serve Nantucket and Dukes County only (American Public Transportation Association, 2011). Some of the traffic in Barnstable County is, therefore, attributable to tourism in surrounding counties, although it is important to note that this traffic, at a minimum, supports the air and ferry businesses in Barnstable County.

3. Demographics

Barnstable County has a year-round population of just 216,000 (U.S. Census Bureau, 2010a); however, it is estimated that over five million tourists visit Barnstable County each year. The following three tables profile Barnstable County's population. As Exhibit 2 shows, the population has experienced a slight decline over the past decade.

Exhibit 2. Population Profile

	Barnstable	Massachusetts
Year-Round Population	215,888	6,547,629
Population Change (2000-2010)	-2.85%	3.13%
Median Age	45	39
Percent Female	52.0%	51.6
Percent Foreign Born	8.5%	15.0%
<i>Ethnic Profile</i>		
White	92.7%	82.5%
Black/African American	1.9%	7.8%
Asian	1.1%	6.0%
Hispanic/Latino	2.2%	9.6%
American Indian	0.6%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Barnstable	Massachusetts
Unemployment Rate	9.8%	10.2%
Percent Out of Labor Force	41.4	32.3%
Median Household Income	\$56,991	\$62,072
Percent of Population Below Poverty Line	8%	11.4%
<i>Educational Attainment</i>		
High School Diploma	27%	26.2%
Bachelor's Degree	22%	22.3%
Graduate/Professional Degree	8%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Barnstable	Massachusetts
Population Density (people/sq. mile)	549.3	809.8
Housing Density (structures/sq. mile)	407.9	334.4
Housing Structures that Are Independent Units	87%	51.7%
Occupied Units	67%	90.7%
Seasonal, Recreational, or Occasional Use	35.5%	4.1%
Median House Value	\$399,900	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Barnstable County was first settled in 1620 by European explorers (Cape Cod Plus, 2011). As the growing industrial revolution in the mid 1830s brought rapid urbanization and industrial development to much of Massachusetts, a lack of flowing water and a unique, isolated geography spared Barnstable County from similar growth. It was during this time that the County developed as a fishing and whaling hub, although the fishing industry has since declined, and the whaling industry is now non-existent. Nonetheless, Barnstable County never experienced the rapid growth that the surrounding areas did, and still today the County remains sparsely populated and the beaches “untouched.” This has positioned Barnstable County as a well-known beach vacation destination since the early 1900s.

The federally-recognized Wampanoag Indian Tribe is the lone Native population that currently lives in Barnstable County. The Wampanoag have lived in southeastern Massachusetts and Rhode Island for thousands of years. Between 1675 and 1676, it is estimated that approximately 40 percent of their population was killed by English settlers during the King Phillip’s War. Since then, the Wampanoag people have progressively decreased in population; only the small Mashpee Tribe of the Wampanoag remains in Barnstable County today (Sultzman, 2011).

Numerous local tourism boards and the Cape Cod Chamber of Commerce sponsor several historic maritime-related festivals throughout the summer months. Two important festivals include: the Cape Cod Maritime Days Festival, a two-week festival in May that celebrates the maritime history on Cape Cod; and the Bourne Scallop Festival, a weekend-long celebration in September (Cape Cod Chamber of Commerce, 2011).

5. Coastal Amenities

Much of the 550-mile coastline in Barnstable County is sand beach that is ideal for sunbathers, walkers, snorkelers, windsurfers, and surfers (although surfing and windsurfing only occur on the south- and west-facing beaches). The County has more than 150 public beaches and several more private beaches (Cape Cod Computer, Inc., retrieved October 2011). There are three national parks that account for 58,000 acres of protected land. These national parks (along with their acreage) are the following: Mashpee Wildlife Refuge (5,871); Monomoy Wildlife Refuge (7,604); and most notably, Cape Cod National Seashore (44,600). There are approximately 30 harbors, 40 marinas/boatyards, and 4 yacht clubs in the County (U.S. Fish and Wildlife Service, 2011; U.S. National Park Service, 2011).

Historically significant coastal attractions include the Pilgrim Monument in Provincetown, the Kennedy Compound in Hyannisport, and nearly 20 lighthouses that once guided fishermen on days of low-visibility and have since become iconic images of Cape Cod. The Woods Hole Oceanographic Institute in Falmouth is considered a world-renowned research facility (Cape Cod Chamber of Commerce, 2011).

6. General Economic Situation

The U.S. Census Bureau lists 9,194 business establishments in Barnstable County in 2009 (U.S. Census Bureau, 2009). The seven largest employers in the County are: Cape Cod Healthcare; Woods Hole Oceanographic Institute; Air National Guard; Nantucket Airlines; Ocean Edge Resort and Golf Club; Steamship Authority; and Woods Hole Martha's Vineyard. Cape Cod Healthcare employs more than 4,000 people and Woods Hole Oceanographic Institute employs more than 1,000. Four of these employers are travel-related and four are directly related to marine/coastal activities (Massachusetts Office of Labor and Workforce Development, 2011).

7. Coastal Tourism/Recreation Activity

Cape Cod travel guides list snorkeling, scuba diving, surfing, kite boarding, kayaking, and sailing and boating as popular water sports in Barnstable County; whale watching and deep-sea fishing are common charter activities. Many guides also list several equipment and boat rental or charter businesses for each activity. Because of the isolated nature of Barnstable beaches, sunbathing and walking are considered the ideal beach activities. The wildlife sanctuaries and national parks are hotspots for on-shore wildlife viewing.

According to National Oceanic and Atmospheric Administration, an estimated 97 percent of the ocean-related jobs in Barnstable are related to tourism (National Oceanic and Atmospheric Administration, 2011). Moreover, according to Cape Cod Chamber of Commerce and the Massachusetts Office of Travel and Tourism, tourism in Barnstable County accounts for more than 40 percent of the County's total economic activity, with an estimated \$813,000,000 in direct tourist expenditures (U.S. Travel Association, October 2011). Leisure and hospitality employment in Barnstable and surrounding counties is seasonal. There are 1,351 establishments dedicated to leisure and hospitality alone in Barnstable County; the average weekly wage for employees of these establishments is \$416 (rising to \$440 in peak summer months). Leisure and hospitality employment in Barnstable County increased by 16,339 jobs, or 145 percent, between winter and summer in 2010. This is compared to at least a 400 percent increase in Dukes and Nantucket Counties, and an approximate 30 percent increase in Plymouth County (U.S. Bureau of Labor Statistics, 2010). The Massachusetts Office of Travel and Tourism states that between 2004 and 2008, room occupancy tax collection consistently exceeded \$18 million per year at the state and local level (U.S. Travel Association, October 2011). According to the 2008 Census, approximately 81 percent of ocean, recreation, and tourism businesses in Barnstable County are small (U.S. Census Bureau, 2009).²

In 2009, 1,287 establishments in the ocean economy directly employed 14,240 people. In 2000, 1,061 such establishments employed 12,761 people. These changes represent growth rates of 21.3 percent and 3.5 percent of establishments and employment in the ocean economy, respectively, between 2000 and 2009 (National Ocean Economics Program, 2012).

There were approximately 207 hotels and 80 bed and breakfasts in Barnstable County that generated nearly \$200 million in revenue in 2010 and 25 campgrounds that generated over \$17 million in revenue (U.S. Census Bureau, 2009; Massachusetts Office of Travel and Tourism, 2011). 35.5 percent of all houses in Barnstable County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and recreation industry (U.S. Bureau of Labor Statistics, 2010). It should be noted that the restaurant industry serves local populations in addition to the tourism industry. By contrast, the hotel industry and the amusement, gambling, and recreation industry are considered to be focused on tourism-related activities, although local populations also support them.

Exhibit 5. Barnstable County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	% Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	239	88	100 [^]
Marinas (713930)	407	727	538	20
Boat Building and Repair (336612)	17	25	21	100 [^]
Boat Dealers (441222)	188	244	218	-22
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	1,451	4,627	2,781	-9
Restaurant Employment (7221 & 7222)	7,213	15,963	10,495	5
Amusement, Gambling, Other Recreation (713)	1,370	3,186	2,091	7
General Tourism				
Travel Agencies (561510)	20	22	20	-69
Tour Operators (561520)	6	22	13	-63
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	61	27	100 [^]

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

[^]BLS figure for "average annual employment" for the selected NAICS code in 2005 is 0, but BLS data also show that at least one firm related to that NAICS code did exist in 2005.

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Bristol County, Massachusetts

1. Synopsis

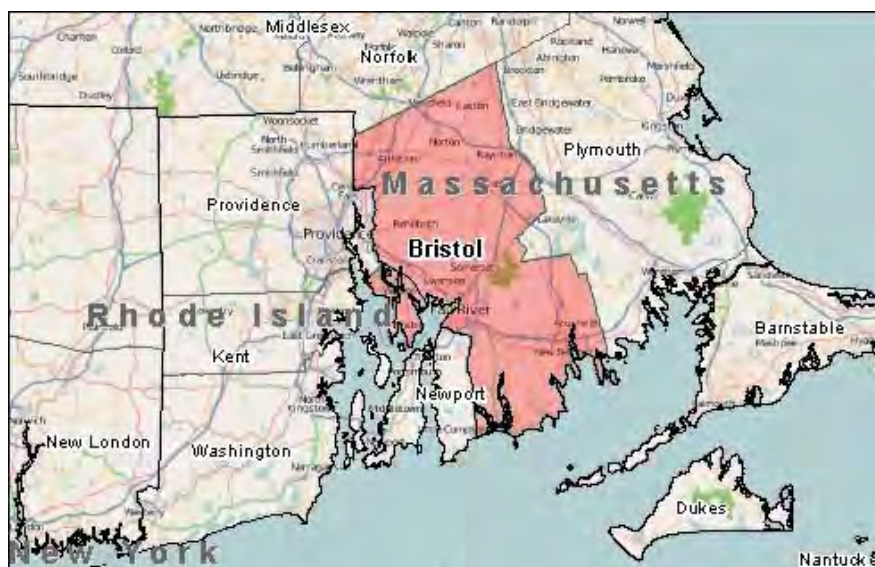
Bristol County, Massachusetts is the southwestern-most county in Massachusetts bordering the state of Rhode Island. The County is comprised of 20 towns and cities with an average population and housing densities. The most populous city is New Bedford, once one of the most important whaling ports in the world, with a population of 95,072. The County's population is 548,285 people (U.S. Census Bureau, 2010a).

Tourism in Bristol County is not a major driver of the ocean economy. According to the National Oceanic and Atmospheric Administration, only 40 percent of ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 65 percent of the ocean recreation and tourism establishments are small (U.S. Census Bureau, 2009).¹ In 2009, the 512 establishments in Bristol's ocean economy directly employed 6,471 people (National Ocean Economics Program, 2012).

2. Location

Bristol County, shown in Exhibit 1, lies in southwestern Massachusetts, less than ten miles from the County's border to Providence, Rhode Island and approximately 50 miles to Boston, Massachusetts (Google, Inc., 2012). It has a land area of 691.2 square miles (U.S. Census Bureau, 2010a), four of its 20 towns lie along the Atlantic Ocean, and three along Narragansett Bay. Bristol County is bordered by Rhode Island to the west, Plymouth County to the east, Norfolk County to the north, and the Atlantic Ocean (Buzzards Bay) to the south.

Exhibit 1. Map of Bristol County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Bristol County is predominantly by car: Interstate-195 connects Bristol County to Providence, Rhode Island and Cape Cod, Massachusetts; U.S. Route 24 is a direct 50-mile route to Boston,

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Massachusetts (Google, Inc., 2012). The New Bedford Airport operates the only commercial service in the County, with flights to Cape Cod, Nantucket, and Martha’s Vineyard only; Providence’s T.F. Green International Airport is approximately 30 miles from Bristol, and Boston’s Logan International Airport is approximately 50 miles (City of New Bedford, Massachusetts, 2012). The Massachusetts Bay Transportation Authority’s Providence/Stoughton Commuter Rail Line stops in Bristol County en-route to Providence, Rhode Island and Boston, Massachusetts (Massachusetts Bay Transportation Authority, 2012). There is one ferry route from Bristol County offering year-round service (with a limited schedule in the off season) to Cuttyhunk in Dukes County, Massachusetts (Cuttyhunk Ferry Company, 2012).

3. Demographics

Bristol County has a year-round population of 548,285 (U.S. Census Bureau, 2010a). The following three tables profile Bristol County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased only modestly over the past decade.

Exhibit 2. Population Profile

	Bristol	Massachusetts
Year-Round Population	548,285	6,547,629
Population Change (2000-2010)	2.54%	3.13%
Median Age (years)	39.8	39.1
Percent Female	51.6%	51.6%
Percent Foreign Born	12.0%	15.0%
<i>Ethnic Profile</i>		
White	88.4%	82.5%
Black/African American	3.3%	7.8%
Asian	1.9%	6.0%
Hispanic/Latino	6.0%	9.6%
American Indian	0.4%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Bristol	Massachusetts
Unemployment Rate	12.5%	10.2%
Percent Out of Labor Force	33.8%	32.3%
Median Household Income	\$51,319	\$62,072
Percent of Population Below Poverty Line	12.9%	11.4%
<i>Educational Attainment</i>		
High School Diploma	29.9%	26.2%
Bachelor’s Degree	17.1%	22.3%
Graduate/Professional Degree	8.1%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Bristol	Massachusetts
Population Density (people/sq. mile)	991.3	809.8
Housing Density (structures/sq. mile)	416.8	360.0
Housing Structures that Are Independent Units	57.9%	51.7%
Occupied Units	92.4%	89.7%
Properties for Seasonal, Rec. or Occasional Use	1.2%	36.6%
Median House Value	\$306,600	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Wampanoag Tribe were the only people to live in Bristol County before the 17th century. However, European explorers, coming from the nearby Plymouth Colony, arrived to New Bedford in 1652 and purchased land from the natives. The Wampanoag Tribe decreased over the years due to disease and disputes with colonists. Today, the Wampanoag are a federally-recognized tribe, although they own no land within Bristol County (Sultzman, 2011).

During the colonial years, Bristol County developed as a manufacturing hub, particularly in shipbuilding, metalsmithing, pottery, and textiles. Throughout the 18th century, the city of New Bedford became the world’s most important whaling port, and resulted in the massive influx of wealth, at one point being the “richest city in the world.” As the manufacturing industry weakened and the whaling industry left, factories and mills began closing. These unoccupied buildings still stand as reminders of the once flourishing times of the County. However, the employment opportunities during those years attracted scores of immigrants, and Bristol County still has a diverse ethnic composition. The many ethnic markets and restaurants in the County attract many nearby residents to the area (Southeastern Massachusetts Convention & Visitors Bureau, 2012).

Bristol County’s rich ethnic and maritime history is celebrated each year by numerous festivals throughout summer months. The annual Whaling City Festival in New Bedford, which is approaching its 43rd anniversary in 2012, includes flea market booths, carnival rides, food, and music. The festival celebrates the city of New Bedford’s importance during its years as the center of the whaling industry. The annual Feast of the Blessed Sacrament, which is approaching its 98th anniversary in 2012, is the largest Portuguese street festival in the United States. The weekend-long event has booths that serve Portuguese foods and drinks, and others that provide entertainment (Southeastern Massachusetts Convention & Visitors Bureau, 2012).

5. Coastal Amenities

Bristol’s coastline is along two bays: Narragansett Bay, which is sheltered by islands and rocky terrain, and Buzzard’s Bay, which is far less sheltered. The County has five public beaches, two harbors, approximately 20 marinas/boatyards, and five yacht clubs (Google, Inc., 2012). There are no nationally protected refuges in the County, although the New Bedford Whaling National Historical Park encompasses 34 acres over 14 city blocks (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The New Bedford Whaling Museum (a national park) is Bristol County’s most well known attraction, and highlights New Bedford’s prosperous years as the center of the whaling industry. Battleship Cove in Fall River is the world’s largest naval ship museum and attracts visitors aboard the decommissioned USS

Massachusetts, one of only eight remaining U.S. battleships (Southeastern Massachusetts Convention & Visitors Bureau, 2012).

6. General Economic Situation

The Bureau of Labor Statistics listed 12,828 business establishments in Bristol County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in Bristol County is St. Luke's Hospital, which employs over 5,000 people, and six other businesses employ over 1,000 people in the County. Six of the nine largest employers are medical or healthcare-related (Massachusetts Office of Labor and Workforce Development, 2012).

7. Coastal Tourism/Recreation Activity

Bristol County's small coastline is mostly private beach. While parts of the shore are rocky, approximately half is sand beach and caters to such activities as sunbathing and beachcombing. Horseneck Beach, the County's most-used public beach, has amenities such as a snack bar and rest houses with showers, and is a popular destination for residents of Providence, Rhode Island. The other beaches in the area are much smaller but offer similar amenities (Massachusetts Department of Conservation and Recreation, 2012).

According to National Oceanic and Atmospheric Administration, 40.3 percent of ocean-related jobs in Bristol are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures—coastal and otherwise—exceeded \$384 million in 2010 (Massachusetts Office of Travel and Tourism, 2011). There are 1,436 establishments dedicated to leisure and hospitality alone in Bristol County; the average weekly wage for employees of these establishments is \$295. Leisure and hospitality employment in Bristol County increased by 3,181 jobs, or by only 15.8 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). Approximately 65 percent of all ocean, recreation, and tourism establishments in Bristol County are small (U.S. Census Bureau, 2009).²

The ocean economy in Bristol County grew at a very fast rate between 2000 and 2009. In 2009, 512 ocean-related establishments employed 6,471 people. In 2000, only 356 establishments employed 4,536 people. Therefore, between 2000 and 2009, the number of ocean-related establishments increased by 43.8 percent and the number of people employed by those establishments increased by a nearly identical 42.7 percent (National Ocean Economics Program, 2012).

Bristol County has approximately 50 hotels and 5 bed and breakfasts that together raised \$3.6 million in local and state tax revenues, as well as approximately 5 campgrounds in Bristol County. Only 1.2 percent of all houses in Bristol County are for seasonal, occupational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and recreation industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further shows that Bristol County's marine and tourism economy does not greatly fluctuate with seasonal changes.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Bristol County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	185	321	241	66.2%
Boat Building and Repair (336612)	41	47	45	-37.5%
Boat Dealers (441222)	50	78	62	-53.4%
Renting Pleasure Boats (532292)	0	-	0	-
Land-Based				
Hotel Employment (72111)	994	1,135	1,059	100% [#]
Restaurant Employment (7221 & 7222)	15,894	16,865	16,412	1.2%
Amusement, Gambling, Other Recreation (713)	1,725	2,998	2,292	0.5%
General Tourism				
Travel Agencies (561510)	50	55	54	-44.3%
Tour Operators (561520)	0	0	23	-58.9%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Figure for hotel employment in 2005 was listed as 0.

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The County of Dukes County, Massachusetts

1. Synopsis

The County of Dukes County, Massachusetts is comprised of the island of Martha's Vineyard as well as the nearby Elizabeth Islands. The County is comprised of seven small towns, each one claiming some part of the 125-mile coastline. The County's year-round population is 16,535 people, but swells in summer months with the influx of vacation-home residents and other tourists. Dukes County is highly dependent on marine-based tourism.

Tourism represents a significant portion of Dukes County's ocean economy. The National Oceanic and Atmospheric Administration states that nearly 97 percent of ocean-related establishments in the County are for tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 85 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 165 ocean-related establishments employed 1,398 people (National Ocean Economics Program, 2012).

2. Location

The County of Dukes County, shown in Exhibit 1, consists of the island of Martha's Vineyard as well as the Elizabeth Islands to the northwest of Martha's Vineyard. It is positioned at the western edge of the Nantucket Sound, with Nantucket County (Nantucket Island) to the east, and Barnstable County (Cape Cod) and Buzzard's Bay to the north. The two islands, with a total land area of 491 square miles, are entirely surrounded by the Atlantic Ocean (U.S. Census Bureau, 2010a).

Exhibit 1. Map of The County of Dukes County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Dukes County is by boat and plane only. Several ferry routes, including one high speed ferry, depart from two locations in Barnstable County, one to Bristol County, another to Washington County, Rhode Island, and a final weekend service from New York City. These ferries service the towns of Cuttyhunk, Vineyard Haven, and Oak Bluffs in Dukes County (American Public Transportation Association, 2012). Martha's Vineyard Airport, owned by Dukes County, offers smaller commercial flights with limited service to Cape Cod, Nantucket, Boston, New York, and Washington D.C. The

overwhelming majority of flights to and from Martha’s Vineyard Airport service Barnstable County Airport (Martha’s Vineyard Airport, 2012).

3. Demographics

Dukes County has a year-round population of 16,535 (U.S. Census Bureau, 2010a). The following three tables profile Dukes County’s population and demographics compared to the rest of the State. As Exhibit 2 shows, the population has increased faster than that of the State’s over the past decade. As can be seen in Exhibit 4, the median house value in the County is double that of the state average.

Exhibit 2. Population Profile

	Dukes	Massachusetts
Year-Round Population	16,535	6,547,629
Population Change (2000-2010)	10.33%	3.13%
Median Age (years)	45.3	39.1
Percent Female	50.5%	51.6%
Percent Foreign Born	10.8%	15.0%
<i>Ethnic Profile</i>		
White	87.6%	82.5%
Black/African American	3.1%	7.8%
Asian	0.8%	6.0%
Hispanic/Latino	2.3%	9.6%
American Indian	1.1%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Dukes	Massachusetts
Unemployment Rate	5.9%	10.2%
Percent Out of Labor Force	33.0%	32.3%
Median Household Income	\$62,407	\$62,072
Percent of Population Below Poverty Line	8.6%	11.4%
<i>Educational Attainment</i>		
High School Diploma	28.1%	26.2%
Bachelor’s Degree	21.9%	22.3%
Graduate/Professional Degree	18.1%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Dukes	Massachusetts
Population Density (people/sq. mile)	160.2	809.8
Housing Density (structures/sq. mile)	166.5	360.0
Housing Structures that Are Independent Units	95.5%	51.7%
Occupied Units	42.9%	89.7%
Properties for Seasonal, Rec. or Occasional Use	53.8%	4.1%
Median House Value	\$681,300	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original inhabitants of Dukes County were the Wampanoag peoples, whose population exceeded 3,000 within the County alone at its height. As of 2000, the federally-recognized Gay Head or “Aquinnah” Tribe of the Wampanoag had 91 people living on their 483-acre reservation in Aquinnah, Dukes County (Sultzman, 2011).

Relations between Native Americans and European Colonists in Dukes County were more civil than surrounding areas following the early 17th Century arrival of the British. The British purchased land from the natives, and allowed their governments to remain in locations that remained theirs (Sultzman, 2011). The borders for “the County of Dukes County” were officially drawn and the County was recognized in 1695.

The whaling industry brought great wealth and prominence to the small population in Dukes County in the 19th Century. In 1872, the Old Colony Railroad connected Woods Hole, Massachusetts to the city of Boston, Massachusetts; the combination of a short ferry ride to the mainland and rail transportation direct to the city lead to an increase in summer residences by wealthy Boston residents. Martha’s Vineyard has been a remote tourist and summer-house destination since the mid-19th Century (U.S. GenWeb, 2012).

Dukes County has several festivals in the summer time. Considered some of the best fishing grounds on the east coast, many festivals are sport-fishing related. The Martha’s Vineyard annual Striped Bass and Bluefish Derby, which occurs one weekend in late summer, is nearing its seventieth anniversary. The Oak Bluffs Monster Shark Tournament is covered each year by the national sports television broadcaster ESPN. Finally, the island celebrates JawsFest each year to commemorate the 1975 Hollywood blockbuster “Jaws,” which was filmed throughout the island with several local actors (Martha’s Vineyard Chamber of Commerce, 2012).

5. Coastal Amenities

Dukes County’s 150-mile coastline is almost entirely remote sand beach. The County has approximately 15 large public beaches, but much of the island’s coast is private access only. There are approximately five harbors, two marinas and three yacht clubs in the County. Dukes County’s only nationally protected land is on Noman’s Land Island National Wildlife Refuge, which totals 628 square acres (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Other attractions to Dukes County include the five historic lighthouses, which offer tours in summer months, as well as the unique architecture of various locations throughout the island. The islands’ architecture includes 17th Century cape houses, houses built during the colonial era, Victorian style cottages (“gingerbread cottages”) in one small neighborhood, and importantly, the large, imposing houses that represent the influx of wealth that dates back to the whaling era. The towns in Dukes County are attractive for their “small town charm” (Martha’s Vineyard Chamber of Commerce, 2012).

6. General Economic Situation

The Bureau of Labor Statistics listed 1,034 business establishments in Dukes County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in the County is Stop & Shop Supermarkets, which employs over 200 people throughout the year. There are only four other businesses that employ over 100 people and they are healthcare, hotel, and government entities (Massachusetts Office of Labor and Workforce Development, 2012).

7. Coastal Tourism/Recreation Activity

Dukes County is predominantly visited for its beaches. The sandy dune beaches attract beachgoers looking for relaxation, swimming, beachcombing, and sunbathing. Surfing, diving, and boat- and shore-fishing are also very popular activities, depending on the location within the County. There are several wooded trails throughout the islands for biking and hiking, as well as several areas (including two wildlife refuges) for bird and nature watching (Martha's Vineyard Chamber of Commerce, 2012).

According to the National Oceanic and Atmospheric Administration, 96.9 percent of the ocean-related jobs in Dukes County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures exceeded \$112 million in 2010 (U.S. Travel Association, October 2011). There are 179 establishments dedicated to leisure and hospitality alone in Dukes County; the average weekly wage for employees of these establishments is \$577, well above the state and national average. Leisure and hospitality employment in Dukes County increased by 2,858 jobs, or by almost 400 percent, between winter and summer in 2010, again indicating the importance of seasonal tourism to the County's economy (U.S. Bureau of Labor Statistics, 2010). Approximately 85 percent of all ocean, recreation, and tourism businesses in Dukes County are small (U.S. Census Bureau, 2009).¹

In 2009, 165 establishments in the ocean economy employed 1,398 people. Though Dukes County is rather small and has a rather small economy, the number of establishments and jobs in 2009 had increased 129.2 percent and 60.1 percent, respectively, since 2000: in 2000, 72 ocean-related establishments employed 870 people (National Ocean Economics Program, 2012).

There are eight hotels, 16 bed and breakfasts, and 3 campgrounds in Dukes County. The eight hotels and 16 bed and breakfasts raised \$2.5 million in state and local room tax revenue (Massachusetts Office of Travel and Tourism, 2011; U.S. Census Bureau, 2009). More importantly, 53.8 percent of all houses in Dukes County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, which has grown five-fold over the recent decade (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates the importance of the summer tourist season to the Dukes County economy; January employment for marine-based activities is almost non-existent.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Dukes County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	0	100	48	26.3%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	0	42	12	-20.0%
Land-Based				
Hotel Employment (72111)	155	505	287	-3.4%
Restaurant Employment (7221 & 7222)	382	1,980	955	577.3%
Amusement, Gambling, Other Recreation (713)	116	778	304	16.0%
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

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Essex County, Massachusetts

1. Synopsis

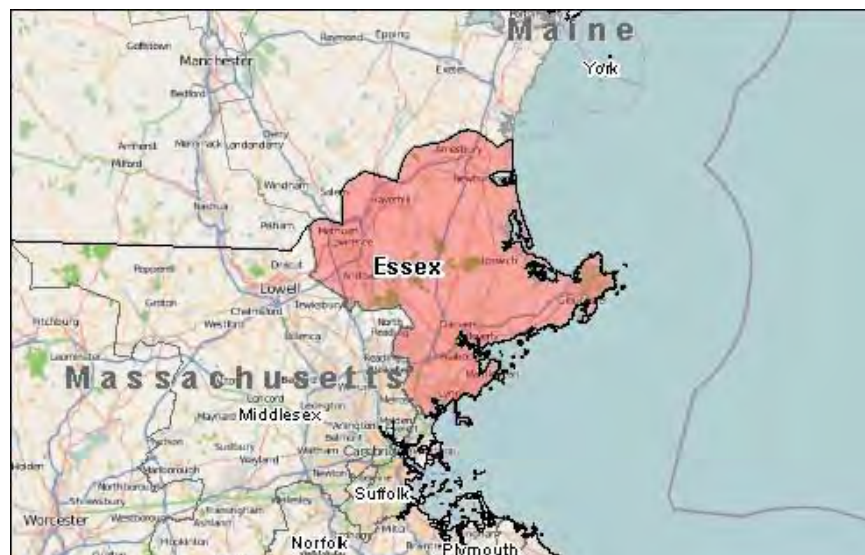
Essex County, Massachusetts is the region that makes up Massachusetts' "North Shore", comprised of 35 towns between Boston, Massachusetts and New Hampshire. The County has long been a major area for the commercial and sport fishing industry. The most populous city is Lynn, with a population of 90,329. The County's population is 743,159 people (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 85.2 percent of the ocean-related jobs in Essex County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 73 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 902 ocean-related establishments directly employed 11,307 people in the County (National Ocean Economics Program, 2012).

2. Location

Essex County, shown in Exhibit 1, is the northern-most county in Massachusetts, but it stretches as far south as approximately 10 miles north of Boston, Massachusetts (Google, Inc., 2012). It has a land area of 828.5 square miles, and sixteen of its 35 towns and cities border the Atlantic Ocean (U.S. Census Bureau, 2010a). Essex County is bordered by New Hampshire to the north, Suffolk County to the south, Middlesex County to the west, and the Atlantic Ocean to the east.

Exhibit 1. Map of Essex County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Essex County is most accessible by Interstate-95, which connects through Boston south to Florida and the Canadian border in the north (Google, Inc., 2012). There are no commercial airports in the County, though Boston's Logan International Airport is within 15 miles of Essex County's southwest border. Boston's Best Cruises operates a ferry between Salem and Boston, although this ferry only runs on weekends during the summer (American Public Transportation Association, 2012). The Massachusetts

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Bay Transportation Authority's (MBTA) Newbury/Rockport Rail Line stops in Salem with commuter routes to Boston and the South Shore (Massachusetts Bay Transportation Authority, 2012).

3. Demographics

Essex County has a year-round population of 743,159 (U.S. Census Bureau, 2010a). The following three tables profile Essex County's population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased modestly over the past decade. For most demographic factors, the County mirrors the State averages.

Exhibit 2. Population Profile

	Essex	Massachusetts
Year-Round Population	743,159	6,547,629
Population Change (2000-2010)	2.73%	3.13%
Median Age (years)	40.4	39.1
Percent Female	52.0%	51.6%
Percent Foreign Born	14.5%	15.0%
<i>Ethnic Profile</i>		
White	81.9%	82.5%
Black/African American	3.8%	7.8%
Asian	3.1%	6.0%
Hispanic/Latino	16.5%	9.6%
American Indian	0.4%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Essex	Massachusetts
Unemployment Rate	9.6%	10.2%
Percent Out of Labor Force	32.0%	32.3%
Median Household Income	\$61,789	\$62,072
Percent of Population Below Poverty Line	10.3%	11.4%
<i>Educational Attainment</i>		
High School Diploma	26.0%	26.2%
Bachelor's Degree	22.1%	22.3%
Graduate/Professional Degree	14.8%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Essex	Massachusetts
Population Density (people/sq. mile)	1,508.8	809.8
Housing Density (structures/sq. mile)	622.8	360.0
Housing Structures that Are Independent Units	57.3%	51.7%
Occupied Units	93.2%	89.7%
Properties for Seasonal, Rec. or Occasional Use	1.8%	36.6%
Median House Value	\$372,400	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Agawam Indian Tribe and the Pentucket Tribe of the Pennacook Indians inhabited what is now Essex County in the years leading up to the colonization by English settlers. Following the settlement of the area in 1623 by the Puritans coming from England, the natives and colonists had a friendly relationship and the natives sought protection by the British from neighboring tribes to the north (InterMarketing, 2012). By King Phillip's War in 1675, the natives had almost entirely assimilated to the new culture lived by the British colonizers. Today, no tribes exist in Essex County.

Throughout the 19th century, Essex County was home to major fishing and shipping ports, which brought great wealth to the area. For a time, Salem, Massachusetts was one of the country's most important port cities. Essex's immigrant population grew during this time, as many Portuguese and Italian families came to the area for the promise of the money to be made in fishing. Today, the restaurants and shops still represent a strong ethnic community (Cape Ann Chamber of Commerce, 2012).

At the turn of the 20th century, Essex County was quickly becoming a major manufacturing center. Lynn, Massachusetts is home to one of the two original General Electric plants. As a major supplier of jet engines during World War II, the plant still produces jet engines for commercial and government contractors. Following the war, manufacturing in Essex County declined, and many factories remain abandoned today, although some towns are currently addressing such vacancies with creative alternative uses for the buildings (InterMarketing, 2012; City of Gloucester, 2012; Destination Salem, 2012).

The Gloucester Waterfront Festival and the Gloucester Schooner Festival are popular events on Cape Ann, the rocky peninsula approximately 30 miles northeast of Boston. The Waterfront Festival has almost 200 vendors from all across the country that sell artwork, play music, or make food. The Schooner Festival is a weekend-long event where you can tour sailboats, watch parades of ships, and witness the Mayor's Race that is located just off the coast of Gloucester (City of Gloucester, 2012).

5. Coastal Amenities

Essex County has approximately 40 public beaches, three national parks and two national wildlife refuges that total 4,882 acres of nationally-protected land. The parks and refuges (and acres of protected land) are as follows: Parker River NWR (4,662), Thacher Island NWR (22), Salem Maritime National Historic Site (9), and Saugus Iron Works (9) (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are approximately 10 harbors, 35 marinas/boatyards, and 25 yacht clubs in the County.

Salem, Massachusetts has two important maritime attractions. The Peabody Essex Museum is an Asian Art and Culture and early American maritime trade and whaling museum, the oldest operating museum in the United States. The Salem Maritime National Historic Site (mentioned above), is the only remaining intact waterfront from the age of U.S. sail trade (Destination Salem, 2012). The Gloucester Fisherman's Memorial, built in 1925, honors the town's fishermen lost at sea between 1623 and 1923, and was added to the National Register of Historic Places in 1996. Gloucester, Massachusetts has lost over 10,000 fishermen to the sea; one of its many shipwrecks being depicted in the novel and Hollywood film "The Perfect Storm" (City of Gloucester, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 18,005 business establishments in Essex County in 2010 (U.S. Bureau of Labor Statistics, 2010). The two largest employers in the County are Alcatel Lucent, a global

telecommunications corporation and North Shore Children’s Hospital, which both employ over 5,000 people (Massachusetts Office of Labor and Workforce Development, 2012). Importantly, none of the twenty largest employers are related to tourism.

7. Coastal Tourism/Recreation Activity

Consumer reports and travel guides depict quiet, remote public beaches with small strips of shops and restaurants throughout Essex County. The County’s beaches foster activities such as sunbathing, beachcombing, boogie boarding and swimming, depending on the beach (some beaches are more calm while others have large waves and strong undertows). The Cape Ann Chamber of Commerce notes that Back Beach is a “renowned scuba diver’s paradise” for its mix of rocky formations and sand beach. Cape Ann’s most popular beach is Crane Beach in Essex – a remote beach separated by wetlands that has large sandbars during low tides. The two wildlife refuges are hotspots for on-shore wildlife viewing (Cape Ann Chamber of Commerce, 2012).

According to National Oceanic and Atmospheric Administration, 85.2 percent of the ocean-related jobs in Essex are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures—coastal and otherwise—approached \$700,000,000 in 2010 (U.S. Travel Association, 2012). There are 2,082 establishments dedicated to leisure and hospitality alone in Essex County; the average weekly wage for employees of these establishments is \$352. Leisure and hospitality employment in Essex County increased by 6,932 jobs (25.5 percent) between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). Approximately 73 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).

Between 2000 and 2009, the ocean economy in Essex County grew at a similar rate to the County’s economy in general. In 2009, 902 ocean-related establishments directly employed 11,307 people. In 2000, these figures were slightly smaller –812 establishments employed 11,075 people. The difference between 2000 and 2009 is characterized by an 11.1 percent increase in the number of establishments and a modest 2.1 percent increase in direct employment (National Ocean Economics Program, 2012).

According to the U.S. Census, there were 67 hotels, 21 bed and breakfasts, and 19 campgrounds in Essex County as of 2009 (U.S. Census Bureau, 2009). In total, the hotels and bed and breakfasts raised \$9.1 million in room tax revenues (Massachusetts Office of Travel and Tourism, 2011). Only 1.8 percent of all houses in Essex County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 illustrates the change in tourism and marine-related employment between winter and summer.

Exhibit 5. Essex County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	8	0	0	-100% [#]
Marinas (713930)	257	554	382	11.7%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	75	163	133	-21.3%
Renting Pleasure Boats (532292)	-	-	0	0
Land-Based				
Hotel Employment (72111)	0	1,708	1,546	-15.8%
Restaurant Employment (7221 & 7222)	19,606	22,710	21,190	7.5%
Amusement, Gambling, Other Recreation (713)	3,702	6,531	4,775	5.4%
General Tourism				
Travel Agencies (561510)	128	136	131	-34.5%
Tour Operators (561520)	86	97	98	10.1%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	4	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Figure for Scenic and Sightseeing Transportation, Water in 2005 was listed as 0.

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Nantucket County, Massachusetts

1. Synopsis

Nantucket County, Massachusetts is an island off the southern shores of Cape Cod, Massachusetts. Nantucket County, comprised only of the town of Nantucket, has 110 miles of shoreline and is considered one of the premiere summer beach destinations in the country. The County's year-round population is 10,172 people, but swells in summer months with the influx of tourists (U.S. Census Bureau, 2010a). Nantucket County's economy is almost entirely dependent on summer tourism.

Tourism represents nearly the entire economic base of the coastal economy in Nantucket County: according to the National Oceanic and Atmospheric Administration, 99.1 percent of the ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Roughly 90 percent of the ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 126 ocean-related establishments that employed 1,122 people (National Ocean Economics Program, 2012).

2. Location

Nantucket County, shown in Exhibit 1, is the land mass south of Nantucket Sound. Nantucket Island is approximately 30 miles south of Barnstable County (opposite Nantucket Sound) and 100 miles south of Boston, Massachusetts (Google, Inc., 2012). It has a land area of only 105.3 square miles (U.S. Census Bureau, 2010a). Dukes County lies to the west, Barnstable County to the north, and the Atlantic Ocean to the south and east.

Exhibit 1. Map of Nantucket County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As an island, Nantucket County is only accessible by water and air. Year-round ferries arrive to Nantucket Harbor from both Hyannis and Harwich Port, Massachusetts (Steamship Authority, 2012). The high speed ferry from Hyannis allows no cars aboard, but runs between Hyannis and Nantucket in

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

one hour (Hyline Cruises, 2012). Flights to and from Nantucket Memorial Airport operate year-round from Boston, Martha’s Vineyard, and Hyannis, Massachusetts, but other commercial flights to and from out of state airports are scheduled during the summer. A large majority of all flights are between Nantucket and Hyannis (Nantucket Memorial Airport, 2012).

3. Demographics

Nantucket County has a year-round population of 10,172 (U.S. Census Bureau, 2010a). The following three tables profile Nantucket County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, there is a great amount of wealth on the island.

Exhibit 2. Population Profile

	Nantucket	Massachusetts
Year-Round Population	10,172	6,547,629
Population Change (2000-2010)	6.85%	3.13%
Median Age (years)	39.4	39.1
Percent Female	48.8%	51.6%
Percent Foreign Born	14.8%	15.0%
<i>Ethnic Profile</i>		
White	87.6%	82.5%
Black/African American	6.8%	7.8%
Asian	1.2%	6.0%
Hispanic/Latino	9.4%	9.6%
American Indian	0.0%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Nantucket	Massachusetts
Unemployment Rate	2.2%	10.2%
Percent Out of Labor Force	23.7%	32.3%
Median Household Income	\$83,347	\$62,072
Percent of Population Below Poverty Line	7.2%	11.4%
<i>Educational Attainment</i>		
High School Diploma	27.1%	26.2%
Bachelor’s Degree	24.9%	22.3%
Graduate/Professional Degree	15.2%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Nantucket	Massachusetts
Population Density (people/sq. mile)	226.2	809.8
Housing Density (structures/sq. mile)	258.4	360.0
Housing Structures that Are Independent Units	91.5%	51.7%
Occupied Units	36.4%	89.7%
Properties for Seasonal, Rec. or Occasional Use	57.9%	36.6%
Median House Value	\$1,000,001	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Wampanoag Indian people were the only inhabitants of the island prior to 1641, the year the island was deeded by the English. While the Wampanoag people still exist in southeastern Massachusetts and have federal recognition, it is believed that the population on Nantucket Island was almost completely destroyed by a plague in 1763, and that the last Nantucket Wampanoag died in 1855 (Sultzman, 2011).

Nantucket was one of the largest whaling ports in the world throughout the eighteenth century, which brought great wealth to the island. However, the growth of railroads made mainland ports more attractive (such as nearby New Bedford, Massachusetts), and the rising silt within Nantucket Harbor prevented large ships from docking. For these reasons, the whaling industry in Nantucket began declining by 1850. This economic hardship caused many people to leave the island (Nantucket.net, 2012).

The depopulation in the 19th century left the island under-developed until the mid-20th century, at which time developers began purchasing buildings for restoration, seeing the potential for a desirable vacation destination for the wealthy population of the northeast United States. Today, Nantucket's "charm" is its colonial buildings and cobblestone streets (Nantucket.net, 2012).

Nantucket County's major festivals are smaller on average and attract niche crowds. Two of the larger and well-known events on the Island are the Boston Pops on Nantucket, which occurs each year on the grass by Jetties Beach, and the Nantucket Sandcastle Day, a competition on Jetties Beach that is judged by professional artists from the Nantucket Island School of Design. Whereas the Boston Pops on Nantucket attracts mostly an older crowd, the Nantucket Sandcastle Day attracts families and people of all ages (Nantucket Island Chamber of Commerce, 2012).

5. Coastal Amenities

The island of Nantucket is surrounded in all directions by 110 miles of shoreline, and 80 miles of beach, all of which are open to the public (Downing, 2007). The Nantucket Wildlife Refuge accounts for 24 acres of nationally-protected land and is the only national park/refuge on the island (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are two harbors, two yacht clubs, and just a few marinas in Nantucket County (Marinas.com, 2012).

Nantucket County's busiest area is the historic district along the harbor, with cobblestone streets and small shops geared towards tourists. The Nantucket Whaling Museum, which celebrates the island's importance during the whaling era, is located in this area and is a well-known tourist attraction. The Maria Mitchell Association, listed on the National Register of Historic Places, is an observatory, museum, and aquarium dating back to 1902. Nantucket also has three light houses listed on the National Register of Historic Places (Nantucket Island Chamber of Commerce, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 904 business establishments in Nantucket County in 2010 (U.S. Bureau of Labor Statistics, 2010). The Harbor House Hotel employs over 250 people and is the largest employer in the County. Only seven other employers on the island employ 100 people or more (Massachusetts Office of Labor and Workforce Development, 2011). According to the U.S. Census

Bureau, approximately 88.8 percent of businesses in Nantucket County are small (U.S. Census Bureau, 2009).²

7. Coastal Tourism/Recreation Activity

Nantucket Island is best-known for its remote, undeveloped sandy beaches. The island attracts beachgoers seeking to swim, sunbath, and beachcomb. South-facing beaches are enjoyed by many surfers, as the open ocean allows for large waves; the Nantucket Island Surf School is also located on the southern side of the island. Although the Nantucket National Wildlife Refuge is small as compared to many others, much of the island remains completely undeveloped and therefore serves a similar purpose for nature enthusiasts, and positions Nantucket County as a prime bird and wildlife viewing area.

According to the National Oceanic and Atmospheric Administration, 99.1 percent of the ocean-related jobs in Nantucket are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures on the island exceeded \$140,000,000 in 2010 (U.S. Travel Association, 2012). There were 147 establishments dedicated to leisure and hospitality alone in Nantucket County; the average weekly wage for employees of these establishments was \$611. Leisure and hospitality employment in Nantucket County increased by 2,596 jobs, or by 429 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, 126 establishments in the ocean economy employed 1,122 people. In 2000, 69 establishments employed 1,191 people. This change from 2000 to 2009 represent an increase 82.6 percent establishments, but a decrease of 5.8 percent jobs over the nine years (National Ocean Economics Program, 2012).

There are eight hotels, 21 bed and breakfasts, and one campground in Nantucket County (U.S. Census Bureau, 2009). State and local room tax revenue from hotels and inns alone was \$2.5 million in 2010 (Massachusetts Office of Travel and Tourism, 2011). 57.9 percent of all houses in Nantucket County are for seasonal, recreational, or occasional use, thus many tourists own a second home in the County or otherwise rent a house, rather than stay in the island's hotels (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates the nearly five-fold increase in employment between winter and summer seasons.

² Businesses are considered small when they have 50 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Nantucket County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	20	31	24	-25.0%
Renting Pleasure Boats (532292)	0	70	28	21.7%
Land-Based				
Hotel Employment (72111)	51	430	208	-36.0%
Restaurant Employment (7221 & 7222)	350	1,892	932	24.6%
Amusement, Gambling, Other Recreation (713)	133	584	321	19.3%
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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Norfolk County, Massachusetts

1. Synopsis

Norfolk County, Massachusetts is known as suburban Boston. The County is comprised of 28 towns and cities with high population and housing densities and has minimal coastline along Boston Harbor and Massachusetts Bay. The most populous city is Quincy with a population of 92,271. The County has a population of 670,850 people, and is the wealthiest in the Commonwealth of Massachusetts (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 85.0 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 66 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 430 ocean-related establishments that produced 7,333 direct jobs in Norfolk County (National Ocean Economics Program, 2012).

2. Location

Norfolk County, shown in Exhibit 1, stretches from the Rhode Island border in the southwest to Boston in the northeast. The County has a land area of 399.6 square miles, but only three of its 28 towns are coastal (U.S. Census Bureau, 2010a). Norfolk County is bordered by Suffolk County to the north, Plymouth County to the south, Worcester County to the west, and Boston Harbor, Massachusetts Bay, and the Atlantic Ocean to the east.

Exhibit 1. Map of Norfolk County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Norfolk County is accessible by car, rail, and ferry. Interstates-95, 93, and 495, as well as U.S. Routes 3, 24, and 128, run through the County either directly into Boston or are otherwise considered “outer-loops” of the city with access to points south and north of the city (Google, Inc., 2012). Amtrak’s Northeast Regional Rail Line, connecting Boston to Washington, D.C. with stops at major cities and suburbs between, makes one stop in Norfolk County (Amtrak, Inc., 2012). The Massachusetts Bay

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Transportation Authority’s Commuter Rail has three lines and several stops within the County that are direct to Boston, one of which connects to both Boston and Providence, Rhode Island (Massachusetts Bay Transportation Authority, 2012). Though small airports exist within the County, large commercial air service is as close as ten miles away at Boston’s Logan International Airport (American Public Transportation Association, 2012).

3. Demographics

Norfolk County has a year-round population of 670,850 (U.S. Census Bureau, 2010a). The following three tables profile Norfolk County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased at roughly the same rate as the state of Massachusetts and is on average wealthier than the state as a whole.

Exhibit 2. Population Profile

	Norfolk	Massachusetts
Year-Round Population	670,850	6,547,629
Population Change (2000-2010)	3.16%	3.13%
Median Age (years)	40.7	39.1
Percent Female	52.1%	51.6%
Percent Foreign Born	15%	15.0%
<i>Ethnic Profile</i>		
White	82.3%	82.5%
Black/African American	5.7%	7.8%
Asian	8.6%	6.0%
Hispanic/Latino	3.3%	9.6%
American Indian	0.2%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Norfolk	Massachusetts
Unemployment Rate	8.8%	10.2%
Percent Out of Labor Force	30.8%	32.3%
Median Household Income	\$80,440	\$62,072
Percent of Population Below Poverty Line	6.1%	11.4%
<i>Educational Attainment</i>		
High School Diploma	22.2%	26.2%
Bachelor’s Degree	26.8%	22.3%
Graduate/Professional Degree	21.6%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Norfolk	Massachusetts
Population Density (people/sq. mile)	1,693.6	809.8
Housing Density (structures/sq. mile)	682.5	360.0
Housing Structures that Are Independent Units	63.1%	51.7%
Occupied Units	95.4%	89.7%
Properties for Seasonal, Rec. or Occasional Use	0.6%	36.6%
Median House Value	\$408,100	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Wampanoag Indian people were the largest inhabitants of the area prior to the arrival of British Colonists in 1622. The Wampanoag currently have five tribes throughout southeastern Massachusetts, two which have federal recognition, and one reservation on Martha's Vineyard Island. No tribes are currently located in Norfolk County (Sultzman, 2011).

Norfolk County was settled by the European Colonists just two years after the first settlement in Plymouth. The Colonists moved north with the help of Native American guides, and set up colonies that would subsequently fail and be re-colonized. The growth of railroads in the mid-19th century allowed more efficient access to Boston, and as Boston grew, so too did Norfolk County. Pockets of the County grew based on varying capabilities; for example, Quincy became a major supplier of granite because of its abundant rock formations (Quincy Chamber of Commerce, 2012). Many towns are now bedroom communities to Boston.

Because of the limited coastline, maritime and ocean-related festivals are generally small in Norfolk County. Two major festivals, one of which celebrates the history of shipbuilders and sailors, are: the recently-begun Quincy Maritime Festival in Quincy and the South Shore Art Center Arts Festival in Cohasset (South Shore Art Center, 2012).

5. Coastal Amenities

Norfolk has minimal coastline along Massachusetts Bay. Still, the County has 10 public beaches, two harbors, and six yacht clubs (City of Quincy, MA, 2012). There are four national parks in the County: Adams National Historical Park, Frederick Law Olmstead National Heritage Site, the John F Kennedy National Heritage Site, and parts of the Boston Harbor Islands National Recreation Area. Protected area in the County includes parts of the 1,482-acre Boston Harbor Islands National Recreation Area; there are no wildlife refuges in Norfolk County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The most important historical maritime attraction in Norfolk County is the U.S. Naval Shipbuilding Museum, which is home to the former Cold War battleship USS Salem, is located in Quincy (United States Naval Shipbuilding Museum, 2012). The Cohasset Maritime Museum, originally built in 1750, similarly houses artifacts from the area's ocean-going history (Cohasset Historical Society, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 19,178 business establishments in Norfolk County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in the County is the Shaw Group, Inc., which employs over 5,000 people. None of the 17 largest employers are directly related to tourism (Massachusetts Office of Labor and Workforce Development, 2012). Approximately 65.7 percent of ocean, recreation, and tourism establishments in Norfolk County are small (U.S. Census Bureau, 2009).²

7. Coastal Tourism/Recreation Activity

The shoreline in Quincy and Weymouth consists of the industrial development characteristic of Boston Harbor. The small shoreline in Cohasset has several rocky cliffs, though quiet, recreational beaches do exist. The beaches along Boston Harbor are not ideal for swimming because of the industrial waters, but can be used for activities such as walking and sunbathing. The beaches outside the harbor—those in

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Cohasset—are cleaner, quieter, and are used, particularly in the summer months, for beach-going recreation.

According to National Oceanic and Atmospheric Administration, 85.0 percent of the ocean-related jobs in Norfolk are related to tourism (National Oceanic and Atmospheric Administration, 2012). Coastal and land-based tourism expenditures exceeded \$838,000,000 in 2010 (U.S. Travel Association, 2012). There were 1,811 establishments dedicated to leisure and hospitality alone in Norfolk County in 2010; the average weekly wage for employees of these establishments was \$447. Leisure and hospitality employment in the County increased by 3,917 jobs, or by only 13.2 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, there were 430 establishments in the ocean economy that employed 7,333 people in Norfolk County. In 2000, there were only 285 ocean-related establishments and 4,490 ocean-related jobs. In the nine years between 2000 and 2009, the number of ocean-related establishments increased by 50.9 percent, and the number of people employed in the sector increased by 63.3 percent (National Ocean Economics Program, 2012).

The U.S. Census Bureau listed 46 hotels, two bed and breakfasts, and three campgrounds in Norfolk County in 2009 (U.S. Census Bureau, 2009). Together, the 48 hotels and bed and breakfasts raised \$11.1 million in state and local room tax revenues (Massachusetts Office of Travel and Tourism, 2011). Less than one percent of all houses in the County are for seasonal, occupational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the restaurant industry as the largest tourism-related employer in the County, though it is worth noting that this industry is served by local populations as well (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates the relatively stable nature of employment throughout the seasons.

Exhibit 5. Norfolk County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	0	-
Marinas (713930)	0	83	54	-26.0%
Boat Building and Repair (336612)	0	0	0	-
Boat Dealers (441222)	53	73	63	-31.5
Renting Pleasure Boats (532292)	-	-	0	0
Land-Based				
Hotel Employment (72111)	1,544	1,553	1,506	-
Restaurant Employment (7221 & 7222)	19,490	21,678	20,677	10.0%
Amusement, Gambling, Other Recreation (713)	3,451	5,203	4,109	-0.5%
General Tourism				
Travel Agencies (561510)	216	212	218	-55.1%
Tour Operators (561520)	26	27	27	-77.3%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

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Plymouth County, Massachusetts

1. Synopsis

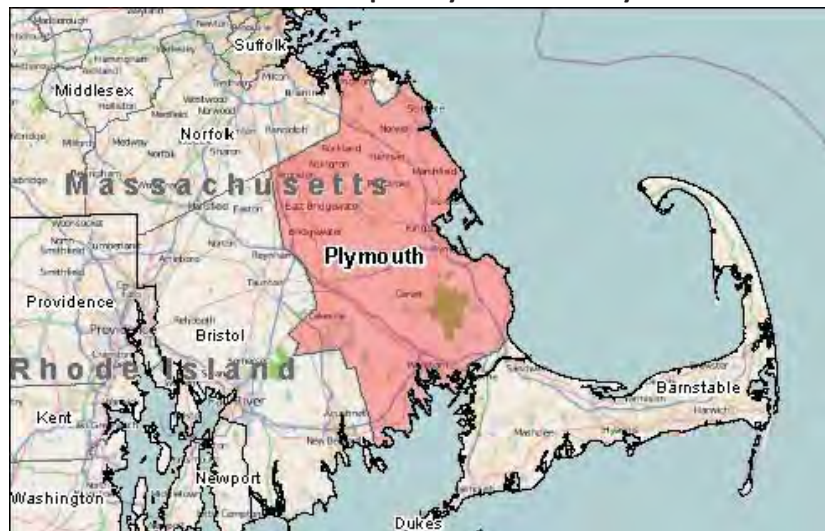
Plymouth County, Massachusetts is the site of the original settlement by the British colonists in 1620 in the town of Plymouth. The County occupies the entire area known to locals as the “south shore” – the region south of Boston and north of Cape Cod. The County is comprised of 27, mostly small, New England towns. 10 of these towns are situated along the coast in Buzzard’s Bay, Cape Cod Bay, or Massachusetts Bay. The County’s population and housing densities are slightly below average and the most populous city is Brockton, with a population of 93,810. The County’s population is 494,919 people (U.S. Census Bureau, 2010a).

Tourism represents a sizable portion of the ocean economy in Plymouth. According to the National Oceanic and Atmospheric Administration, 85.6 percent of the ocean-related jobs are in tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 71 percent of ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, there were 557 establishments and 7,477 jobs in the ocean economy in Plymouth (National Ocean Economics Program, 2012).

2. Location

Plymouth County, shown in Exhibit 1, lies in southeastern Massachusetts, approximately 40 miles to Boston, Massachusetts and 50 miles to Providence, Rhode Island (Google, Inc., 2012). It has a land area of 1,093.4 square miles and over 250 miles of shoreline (U.S. Census Bureau, 2010a). Plymouth County is bordered by Norfolk and Suffolk Counties to the north, Bristol County to the west, Barnstable County to the south, and Cape Cod Bay and Massachusetts Bay to the east.

Exhibit 1. Map of Plymouth County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Access to Plymouth County is predominantly by car and rail. U.S. Route 3 runs the length of Plymouth County, and connects Boston to Cape Cod. Interstate-495 and Interstate-195 also connect Cape Cod to points north and west, including Providence, through Plymouth County (Google, Inc., 2012). The Massachusetts Bay Transportation Authority operates the Old Colony Rail Line, beginning in the town of Plymouth and ending in Boston, will other stops in Plymouth County along the way (Massachusetts Bay

Transportation Authority, 2012). Several airports in the County serve charter clients only; Boston’s Logan International Airport and Providence’s T.F. Green International Airport or both approximately 50 miles from the center of Plymouth County (American Public Transportation Association, 2012). There is one summer-only ferry route that connects the town of Plymouth to Provincetown, Massachusetts (Waterfront Enterprises, Inc., 2011).

3. Demographics

Plymouth County has a year-round population of 494,919 (U.S. Census Bureau, 2010a). The following three tables profile Plymouth County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased modestly over the past decade.

Exhibit 2. Population Profile

	Plymouth	Massachusetts
Year-Round Population	494,919	6,547,629
Population Change (2000-2010)	4.67%	3.13%
Median Age (years)	41.1	39.1
Percent Female	51.4%	51.6%
Percent Foreign Born	7.9%	15.0%
<i>Ethnic Profile</i>		
White	85.5%	82.5%
Black/African American	7.2%	7.8%
Asian	1.2%	6.0%
Hispanic/Latino	3.2%	9.6%
American Indian	0.2%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Plymouth	Massachusetts
Unemployment Rate	11.5%	10.2%
Percent Out of Labor Force	31.1%	32.3%
Median Household Income	\$72,076	\$62,072
Percent of Population Below Poverty Line	8.0%	11.4%
<i>Educational Attainment</i>		
High School Diploma	30.1%	26.2%
Bachelor’s Degree	22.3%	22.3%
Graduate/Professional Degree	11.7%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Plymouth	Massachusetts
Population Density (people/sq. mile)	750.9	809.8
Housing Density (structures/sq. mile)	303.7	360.0
Housing Structures that Are Independent Units	77.1%	51.7%
Occupied Units	90.5%	89.7%
Properties for Seasonal, Rec. or Occasional Use	5.1%	36.6%
Median House Value	\$360,700	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to the arrival of the European colonists, the Wampanoag peoples inhabited the land throughout southern Massachusetts, Rhode Island, and Connecticut. The Patuxet Tribe of the Wampanoag was the group centered in what is now the town of Plymouth. The colonists made an agreement with Squanto—a Patuxet who had been taken from the land and enslaved years earlier by the Spanish—to act as their translator. Squanto would eventually prove to be a vital intermediary and support for cooperation between the natives and the colonists; this cooperation is the underlying theme celebrated every year at Thanksgiving. Currently, the Mashpee Tribe and Herring Pond Tribe of the Wampanoag reside in Plymouth County; only the Mashpee Tribe is federally-recognized. In November 2011, the Massachusetts legislature authorized the Mashpee Tribe of the Wampanoag people to build a casino in the Plymouth County town of Middleboro (Sultzman, 2011).

In the 19th century, Plymouth County was dependent on fishing, shipping, and later in the century, grew as a major shipbuilding and manufacturing hub; the world's largest manufacturer of rope was located in the town of Plymouth but went out of business due to competition from synthetic fiber ropes. Slowly, manufacturing in the County subsided and the area became economically dependent on the city of Boston and the smaller economy of the town of Plymouth. Although Plymouth County has easy access to Boston, some towns are still considered distant for a daily commute; the northern towns are suburbs of Boston where many of their residents work in the city, whereas the southern towns in the County are more economically dependent on tourism and a more localized economy (U.S. GenNet, 2012).

Plymouth County has several smaller festivals throughout the year. Some of the larger festivals include: the Plymouth Waterfront Festival in downtown Plymouth, which features over 200 local artists and crafters, food booths, and live entertainment; the Marshfield Fair, which attracts families and children of all ages to rides, games, food, and live shows; and the Annual Cranberry Harvest Celebration, which celebrates the County's harvest of the cranberry bogs – the County's major commercial crop (Destination Plymouth, 2012).

5. Coastal Amenities

Plymouth's coastline is 250 miles of mostly sand beach, much of which is separated by large sandy cliffs. The County has only a handful of public beaches, because much of the coastline is marked by private beaches within the private ocean-side neighborhoods. There are no national parks in the County, but the Massasoit National Wildlife Refuge protects 195 acres of coastline in the town of Plymouth (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). There are approximately 10 harbors, 11 marinas/boatyards, and 10 yacht clubs in the County (Destination Plymouth, 2012).

Historically significant attractions in Plymouth County include the Mayflower II, Plymouth Rock, and the Plimoth Plantation in Plymouth, which are landmarks and living-history museums commemorating the arrival of the Pilgrims in 1620 and subsequent growth of the first colony. World's End in Hingham is a 251-acre serene park designed by landscape architect Frederick Law Olmstead with wooded trails and open grasslands. Views from the park include the Boston skyline and the Historic Boston Harbor Islands (Destination Plymouth, 2012).

6. General Economic Situation

The Bureau of Labor Statistics listed 11,927 business establishments in Plymouth County in 2010 (U.S. Bureau of Labor Statistics, 2010). There are four hospitals, two education-related institutions, and two retail/manufacturing companies in the County that employ more than 1,000 people each (Massachusetts Office of Labor and Workforce Development, 2012).

7. Coastal Tourism/Recreation Activity

Plymouth County beaches are very remote, and almost all of them do not have amenities such as concessions, boardwalks, or bathroom facilities. Many beaches are separated from “development” by large cliffs, while others are beaches lined by summer cottages or year-round residences at sea level. Most of the beaches in Plymouth County are for neighborhood residents, or otherwise require a beach sticker that can be purchased by residents only. These remote beaches are ideal for sunbathing, beachcombing, and swimming. Because of the sheltered nature of the Cape Cod Bay, no surfing and minimal sailing occurs, although motorboat activities are common. Wildlife viewing is particularly common at the Massasoit National Wildlife Refuge and the ocean-side Ellisville Harbor State Park.

According to National Oceanic and Atmospheric Administration, 85.6 percent of the ocean-related jobs in Plymouth are related to tourism (National Oceanic and Atmospheric Administration, 2012). Coastal, historical, and other tourism expenditures exceeded \$5 million and accounted for 4,000 direct jobs in 2010 (U.S. Travel Association, 2012). There are 1,261 establishments dedicated to leisure and hospitality alone in Plymouth County; the average weekly wage for employees of these establishments is \$326. Leisure and hospitality employment in Plymouth County increased by 5,492 jobs, or by 30.5 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010). Approximately 71 percent of all ocean, recreation, and tourism establishments in Plymouth County are small (U.S. Census Bureau, 2009).¹

The ocean economy in Plymouth County grew at a faster rate than Plymouth’s economy in general. In 2009, 557 establishments in the ocean economy employed 7,477 people. Nine years earlier in 2000, there were only 239 ocean-related establishments that employed 4,040 people. In the nine years between 2000 and 2009, the number of ocean-related establishments therefore increased 133.1 percent and the number of jobs in the sector increased 85.1 percent (National Ocean Economics Program, 2012).

According to the U.S. Census Bureau, there are 30 hotels, three bed and breakfasts, and 20 campgrounds in Plymouth County (U.S. Census Bureau, 2009). The 33 hotels and bed and breakfasts raised \$3.4 million in state and local room tax revenue (Massachusetts Office of Travel and Tourism, 2011). 5.1 percent of all houses in Plymouth County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, Plymouth County’s employment is strengthened greatly by the restaurant industry. U.S. Bureau of Labor Statistics figures were not available for the hotel industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 – specifically regarding marinas, water transportation, and amusement and other recreation – illustrates the economic importance of the summer tourist season to the local economy.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Plymouth County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	65	24	100% [#]
Marinas (713930)	157	386	253	17.7%
Boat Building and Repair (336612)	41	35	36	100% [#]
Boat Dealers (441222)	102	131	113	-24.2%
Renting Pleasure Boats (532292)	-	-	0	0
Land-Based				
Hotel Employment (72111)	0	0	0	-
Restaurant Employment (7221 & 7222)	14,124	16,216	15,014	4.7%
Amusement, Gambling, Other Recreation (713)	2,089	4,516	3,143	-13.4%
General Tourism				
Travel Agencies (561510)	46	44	44	-38.0%
Tour Operators (561520)	0	0	0	-100% [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Figures for Scenic and Sightseeing Transportation, Water and Boat Building and Repair was listed as 0 in 2005.

[^] Figure for Tour Operators was listed as 16 in 2005.

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Suffolk County, Massachusetts

1. Synopsis

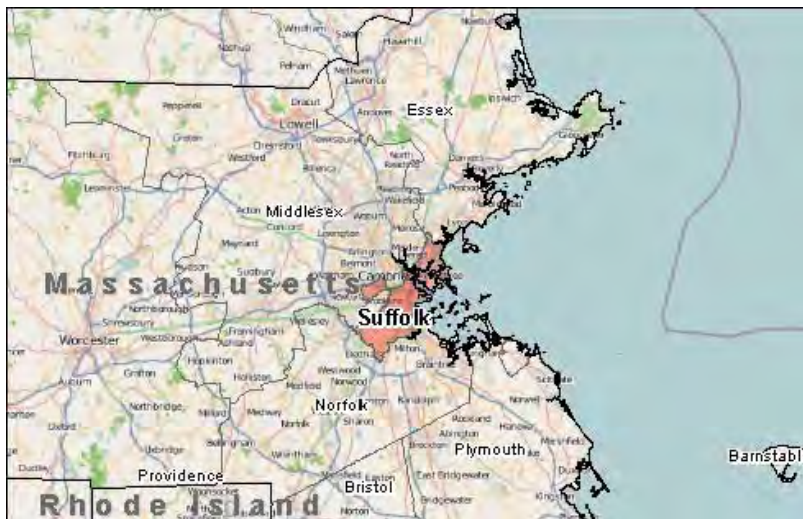
Suffolk County, Massachusetts is the economic center of Massachusetts. The County is comprised of three cities and only one town, all four with high population and housing densities. The most populous city is Boston, the 22nd largest city in the United States, with a population of 617,594. The County's population is 722,023 people (U.S. Census Bureau, 2010a).

Tourism as a percentage of the ocean economy in Suffolk is minor: according to the National Oceanic and Atmospheric Administration, 39.8 percent of ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). 60.9 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 726 ocean-related establishments which resulted in 15,738 jobs (National Ocean Economics Program, 2012).

2. Location

Suffolk County, shown in Exhibit 1, lies along the central coastline of Massachusetts in Boston Harbor and Massachusetts Bay. It has a total area of only 120.2 square miles, making it the smallest county by area in the Commonwealth of Massachusetts (U.S. Census Bureau, 2010a). All three of Suffolk's cities are coastal. Suffolk County is bordered by Norfolk to the southwest, Middlesex to the northwest, Plymouth to the southeast, and Boston Harbor and Massachusetts Bay to the east.

Exhibit 1. Map of Suffolk County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As a major northeast city, Suffolk County is easily accessible by land, air, rail, and water. Boston is at the center of several interstate highways that connect to all points north, west, and south. Boston's Logan International Airport is one of the northeast's largest, and offers daily non-stop flights to several surrounding cities. Rail within Suffolk County consists only of the "T," Boston's subway, and to points outside of the County includes both the commuter rail and Amtrak's Northeast Rail Line (American Public Transportation Association, 2012; Amtrak, Inc., 2012; Massachusetts Bay Transportation

¹ Business are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Authority, 2012). The Massachusetts Bay Transportation Authority owns and operates the T and the commuter rail, as well as commuter ferry routes that connect Quincy, Hingham, and Hull to Boston’s Wharf and Logan International Airport (Massachusetts Bay Transportation Authority, 2012). Non-commuter ferries include the Boston Harbor Islands ferry and the Provincetown High-Speed Ferry (American Public Transportation Association, 2012).

3. Demographics

Suffolk County has a year-round population of 722,023 (U.S. Census Bureau, 2010a). The following three tables profile Suffolk County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Suffolk County is, on average, younger, more ethnically diverse, and more densely populated than the average county in Massachusetts.

Exhibit 2. Population Profile

	Suffolk	Massachusetts
Year-Round Population	722,023	6,547,629
Population Change (2000-2010)	4.67%	3.13%
Median Age (years)	31.5	39.1
Percent Female	51.8%	51.6%
Percent Foreign Born	27.7%	15.0%
<i>Ethnic Profile</i>		
White	56%	82.5%
Black/African American	21.6%	7.8%
Asian	8.2%	6.0%
Hispanic/Latino	19.9%	9.6%
American Indian	0.4%	0.8%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Suffolk	Massachusetts
Unemployment Rate	13.2%	10.2%
Percent Out of Labor Force	31.4%	32.3%
Median Household Income	\$50,020	\$62,072
Percent of Population Below Poverty Line	22.8%	11.4%
<i>Educational Attainment</i>		
High School Diploma	25.7%	26.2%
Bachelor’s Degree	22.7%	22.3%
Graduate/Professional Degree	17.6%	16.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Suffolk	Massachusetts
Population Density (people/sq. mile)	12,415.7	809.8
Housing Density (structures/sq. mile)	5,426.0	360.0
Housing Structures that Are Independent Units	19.3%	51.7%
Occupied Units	92.8%	89.7%
Properties for Seasonal, Rec. or Occasional Use	1.0%	36.6%
Median House Value	\$384,500	\$334,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Native American population in Suffolk County predominantly lived on the islands within Boston Harbor. However, as other Wampanoag from surrounding areas were forced to live on the islands throughout the winter of 1675-1676 during the King Phillip's War, the Wampanoag population decreased due to starvation and disease. While the population was not entirely killed off at this time, much of the Tribe moved out of the area. Today, the Wampanoag has two Tribes with federal recognition, though neither in Suffolk County (U.S. National Park Service, 2012).

Suffolk County was first settled in 1630 by European Colonists, but it is best known for its importance during the Revolutionary War. The County was the location of such events as the Boston Massacre in 1770, the Boston Tea Party in 1773. The colonial influence in Suffolk County is still very much present through the area's brownstone colonial rowhouses (SearchBoston, 2012).

In the mid-twentieth century, the factories in Suffolk County became obsolete and the area faced a downturn. Revitalization efforts throughout the years resulted in mixed success, but during the economic boom of the 1970s, the city of Boston's Financial District grew with the construction of several high rises. Currently, Boston is considered a world leader in medical innovation, and is known as a center of research, manufacturing, finance, and biotechnology. Suffolk County has several world-renowned hospitals, colleges, and universities (SearchBoston, 2012).

Boston Harborfest, happening annually on the 4th of July, includes over 200 activities throughout Boston's historic downtown and waterfront districts to celebrate the colonial and maritime heritage of "the cradle of the American Revolution." The Boston Pops and Boston's fireworks on the 4th of July are broadcast nationally (Celebrate Boston, 2012).

5. Coastal Amenities

Suffolk has 45 miles of coastline along Boston Harbor. The County has approximately 10 public beaches, five marinas, and 20 yacht clubs all within its one harbor. There are three national parks—Boston National Historical Park, the African-American National Historical Site, and the Boston Harbor Islands—but there are no wildlife refuges and no nationally-protected wetlands or nature reserves (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Boston Harbor has a rich history dating back to the colonial era. The thirty-four Boston Harbor Islands are a popular attraction for all interests because of the diversity between each one; some of the islands house Civil War-era forts (Georges Island), whereas others offer campsites (Lovells and Bumpkin), sandy beaches (Spectacle), and plentiful wildlife (Grape). Faneuil Hall, a marketplace and meeting hall where several speeches by Samuel Adams and other revolutionaries encouraged independence from Great

Britain, attracts over 20 million visitors per year (U.S. National Park Service, 2012). Other, non-historical attractions include the New England Aquarium and a tour of the city via a Duck Boat.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 19,210 business establishments in Suffolk County in 2010 (U.S. Bureau of Labor Statistics, 2010). The two largest employers, both employing over 10,000 people, are Brigham and Women's Hospital and Massachusetts General Hospital. Of the eight largest employers in the County, four are hospitals and three are financial institutions (Massachusetts Office of Labor and Workforce Development, 2012). According to the 2010 Census, approximately 66.9 percent of businesses in Suffolk County are small (U.S. Census Bureau, 2009).²

7. Coastal Tourism/Recreation Activity

Beaches in Suffolk County are in urban areas and the waters are more industrial due to the nearby Port of Boston and the general pollution within Boston Harbor. Beaches such as Revere Beach are regarded for both their more remote location and easy accessibility via Boston's T. Because of the urban nature of the area, Suffolk's shoreline is not ideal for activities such as swimming, sunbathing, and beachcombing in most places, and is instead more often used for shipping/industrial activity, boating, and sailing. Downtown Boston at the Harborwalk at Rowes Wharf and Boston Harbor are locations for strolling along the public docks and taking harbor cruises.

According to National Oceanic and Atmospheric Administration, 39.8 percent of the ocean-related jobs in Suffolk are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures in the County amounted to \$6.4 billion in 2010 (U.S. Travel Association, 2012). There are 2,547 establishments dedicated to leisure and hospitality alone in Suffolk County; the average weekly wage for employees of these establishments is \$635, the highest wage for that industry in the Commonwealth of Massachusetts. Leisure and hospitality employment in Suffolk County increased by 3,138 jobs, or by a mere 5.7 percent, between winter and summer in 2010 (U.S. Bureau of Labor Statistics, 2010).

In 2009, 726 establishments in the ocean economy employed 15,738 people. In 2000, there were 785 establishments and 16,536 jobs; the number of establishments decreased 7.5 percent and the number employed similarly decreased 4.8 percent over the nine years between 2000 and 2009 (National Ocean Economics Program, 2012).

The U.S. Census Bureau lists 72 hotels, 8 bed and breakfasts, and 2 campgrounds within the County's limits (U.S. Census Bureau, 2009). According to the Massachusetts Office of Travel and Tourism, state and local room tax revenues amounted to \$91.2 million in 2010 (Massachusetts Office of Travel and Tourism, 2011). Only one percent of all houses in Suffolk County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2009).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, followed by the hotel industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further shows the stability in tourism-related employment between the winter and summer seasons.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Suffolk County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	252	759	476	5.5%
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	0	21	21	16.7%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	10,413	10,984	10,837	-#
Restaurant Employment (7221 & 7222)	29,360	31,666	31,283	18.0%
Amusement, Gambling, Other Recreation (713)	2,807	2,799	2,887	5.8%
General Tourism				
Travel Agencies (561510)	431	430	416	-23.1%
Tour Operators (561520)	1,085	1,143	1,111	14.2%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	230	461	374	9.4%

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2008 figure).

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Atlantic County, New Jersey

1. Synopsis

Atlantic County, New Jersey lies in the southern peninsula of New Jersey. The County is best known for its boardwalk along the beach in Atlantic City that is lined with casinos, amusement rides, restaurants, and vendors. The County is comprised of 23 townships, boroughs, and cities with lower population densities, on average, than the state of New Jersey (Atlantic County, New Jersey, County Government, 2012a). The most populous municipality is Egg Harbor Township, with a population of 43,323. The County's population is 274,549 people (U.S. Census Bureau, 2010a).

Tourism is a major part of Atlantic County's economic. According to the National Oceanic and Atmospheric Administration, an estimated 95.6 percent of the ocean-related jobs in Atlantic County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 72 percent of these establishments are small (U.S. Census Bureau, 2009).¹ In 2009, there were 665 ocean-related establishments and 9,687 ocean-related jobs in the County (National Ocean Economics Program, 2012).

2. Location

Atlantic County, shown in Exhibit 1, lies in southern New Jersey, approximately 45 miles southeast of Philadelphia, Pennsylvania, and just over 100 miles from the Newark-New York City area (Google, Inc., 2012). It has a total area of 671 square miles (U.S. Census Bureau, 2010a), five of its 23 municipalities front the Atlantic Ocean, and 10 more line the bays and wetlands sheltered by the outer peninsulas. Atlantic County is bordered by Cape May County to the south, Ocean County and Burlington Counties to the north, Cumberland, Salem, Gloucester, and Camden Counties to the west, and the Atlantic Ocean to the east.

Exhibit 1. Map of Atlantic County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Two major expressways provide easy access to Atlantic County: the Atlantic City Expressway is a direct highway between Philadelphia, Pennsylvania and Atlantic City, and the Garden State Parkway spans the length of the New Jersey Coastline, making a direct route to Newark, New Jersey and New York City (Google, Inc., 2012). The Atlantic City International Airport sits in the center of the County, although it is smaller and more expensive than the nearby Philadelphia and the New York City airports, it has daily service to Boston and Chicago, among other locations (American Association of Public Transportation, 2012). Amtrak’s Atlantic City line offers multiple trips per day between Philadelphia and Atlantic City, with four total stops in the County (Amtrak, Inc., 2012). There are no ferry lines that service Atlantic County.

3. Demographics

Atlantic County has a year-round population of 274,549 (U.S. Census Bureau, 2010a). The following three tables profile Atlantic County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, the population has increased at nearly twice the rate of New Jersey over the past decade.

Exhibit 2. Population Profile

	Atlantic	New Jersey
Year-Round Population	274,549	8,791,894
Population Change (2000-2010)	8.71%	4.49%
Median Age (years)	39.9	39.0
Percent Female	51.5%	51.3%
Percent Foreign Born	15.4%	20.3%
<i>Ethnic Profile</i>		
White	65.4%	68.6%
Black/African American	16.1%	13.7%
Asian	7.5%	8.3%
Hispanic/Latino	16.8%	17.7%
American Indian	0.4%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Atlantic	New Jersey
Unemployment Rate	12.6%	10.8%
Percent Out of Labor Force	34.0%	33.4%
Median Household Income	\$52,571	\$37,681
Percent of Population Below Poverty Line	14.3%	10.3%
<i>Educational Attainment</i>		
High School Diploma	35.6%	29.5%
Bachelor’s Degree	16.3%	22.1%
Graduate/Professional Degree	6.7%	13.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Atlantic	New Jersey
Population Density (people/sq. mile)	494.1	1,195.5
Housing Density (structures/sq. mile)	227.9	483.2
Housing Structures that Are Independent Units	68.2%	64.0%
Occupied Units	81.2%	89.2%
Properties for Seasonal, Rec. or Occasional Use	12.0%	3.8%
Median House Value	\$264,400	\$357,000

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Leni-Lenape Tribe—descendants of the Paleo-Indians that came from Siberia over 30,000 years ago—originally inhabited the land that would become Atlantic County. Early settlers, under the watch of William Penn, made efforts to engage in fair trades and purchased much of the land from the tribe. As more land purchases took place, the Lenape were forced north and west. Today, three federally-recognized Lenape Tribes are in Oklahoma and Wisconsin (Atlantic County, New Jersey, County Government, 2012b).

Southern New Jersey was explored in the 16th century by Dutch, French, Swedish, Finnish, and Portuguese ships, but the land that is modern-day Atlantic County was not settled by European colonists until 1693. Many of the first settlers were whalers, and the maritime industry comprised a major portion of the economic base of the region; shipbuilding was the County's largest industry. Today, much of Atlantic County's economic base is tourism, although the maritime industry is still relevant (Atlantic County, New Jersey, County Government, 2012b).

5. Coastal Amenities

Atlantic County has approximately 20 miles of shoreline. The County has only four public beaches, which total over 14 miles. There are nine harbors, 12 marinas/boatyards, and only one yacht club in the County (Atlantic County, New Jersey, County Government, 2012b). Atlantic County has the majority of the 46,000-acre Edwin B. Forsythe National Wildlife Refuge, which is also part within neighboring Ocean County. The Edwin B Forsythe National Wildlife Refuge is located in the tidal wetlands between mainland New Jersey and the peninsulas along the outer coast (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The Atlantic County Park in Estell Manor is the site of the ruins of the former Bethlehem Loading Company, one of the United State's largest producers of ammunition during World War I. Historic Gardner's Basin in Atlantic City includes a maritime park, the Atlantic City Aquarium, and a crafter's village with the intent to provide waterfront recreational access to the public and conduct marine education programs. While historic parks and attractions do exist, the draw to Atlantic County is the hustle and bustle of the Atlantic City boardwalk for most, and the more remote, secluded beaches for others (Atlantic, Cape May, and Cumberland County Governments, 2011).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 6,630 business establishments in Atlantic County in 2010 (U.S. Bureau of Labor Statistics, 2010). As of 2007, the largest employers in the County were AtlantiCare Health Systems, which employed 4,465 people in 2010, and Shore Memorial Hospital, which employed 1,677 people (The Press, 2007). Nonetheless, Atlantic County's largest economic engine is the gambling industry, centered in Atlantic City.

7. Coastal Tourism/Recreation Activity

Atlantic County is comprised of remote beaches and wetlands, as well as the well known night-life destination Atlantic City. The Atlantic City shoreline has miles of sand beach alongside its boardwalk lined with casinos, amusement rides, restaurants, and vendors. Walking along the boardwalk, shopping, and sunbathing on the beach are popular activities along the water in this area. The Atlantic City boardwalk has twelve 24-hour, seven day a week large casinos, full of restaurants, nightclubs, and game rooms, which is the largest casino resort area on the east coast. Consequently, a large majority of visitors to the Atlantic City boardwalk area only visit for gambling, nightlife, or similar purposes. Still, there are many that are attracted by the combination of casinos and beaches.

According to the New Jersey Top Ten Beaches voting contest, Brigantine Beach is the top beach in the County, and is advertised as a “beautiful, pristine hideaway for families seeking a safe, peaceful haven” (New Jersey’s Top 10 Beaches, 2012). The beaches north and south of the Atlantic City boardwalk are similarly remote, some attracting surfers and others attracting surf fishermen. The 46,000-acre National Wildlife Refuge and several of the state parks in the County attract bird watchers and wildlife enthusiasts from all over.

The Southern New Jersey Vacationer lists “The Jersey Atlantic Wind Farm,” a five turbine wind farm in Atlantic City, as the number 39 “101 Ways to Enjoy NJ’s Southern Shore” (Atlantic, Cape May, and Cumberland County Governments, 2011).

According to National Oceanic and Atmospheric Administration, 95.6 percent of the ocean-related jobs in Atlantic are related to tourism (National Oceanic and Atmospheric Administration, 2012). Tourism expenditures exceeded \$10.5 billion in Atlantic County in 2010, a large number likely attributable to the casino spending in Atlantic City (Vantage Strategy, 2010). There are 964 establishments dedicated to leisure and hospitality alone in Atlantic County; the average weekly wage for employees of these establishments is \$578. Between the winter and summer of 2010, leisure and hospitality employment in Atlantic County increased by 6,705 jobs, or by only 14.8% percent (U.S. Bureau of Labor Statistics, 2010). Approximately 72 percent of all ocean, recreation, and tourism establishments in Atlantic County are small (U.S. Census Bureau, 2009).²

In 2009 there were 665 ocean-related establishments in Atlantic County, which represents an increase of 30.7 percent over the 509 establishments in 2000. Employment saw a similarly large increase of 29.2 percent between 2000 and 2009: in 2009 there were 9,687 ocean-related jobs, whereas in 2000, there were only 7,496 (National Ocean Economics Program, 2012).

There are approximately 127 hotels (plus 12 additional casino hotels all in Atlantic City), three bed and breakfasts, and 13 campgrounds in Atlantic County (U.S. Census Bureau, 2009). A search of the Atlantic City Visitors and Conventions Bureau found 29 of the non-casino hotels, two of the bed and breakfasts, and none of the campgrounds in Atlantic County are in Atlantic City. An additional 12 percent of all houses in Atlantic County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry. Whereas most tourism-related industries have declined in the last

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

five years, the restaurant industry has increased by over 12 percent (Exhibit 5). The data in Exhibit 5 shows a relatively stable level of employment between winter and summer; this stability is likely attributable to year-round employment at the area's large casinos (U.S. Bureau of Labor Statistics, 2010).

Exhibit 5. Atlantic County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	19	0	-100% [#]
Marinas (713930)	62	174	141	-41.0%
Boat Building and Repair (336612)	0	0	0	-100% [^]
Boat Dealers (441222)	53	98	82	-31.7%
Renting Pleasure Boats (532292)	0	31	9	50.0%
Land-Based				
Hotel Employment (72111)	1,501	1,746	1,598	-23.7%
Restaurant Employment (7221 & 7222)	8,715	11,502	9,928	12.4%
Amusement, Gambling, Other Recreation (713)	1,118	2,012	1,613	-11.3%
General Tourism				
Travel Agencies (561510)	38	57	47	-39.0%
Tour Operators (561520)	20	20	20	66.7%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Scenic and Sightseeing Transportation, Water in 2005 was listed as 6.

[^] BLS figure for Boat Building and Repair in 2005 was listed as 371.

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Cape May County, New Jersey

1. Synopsis

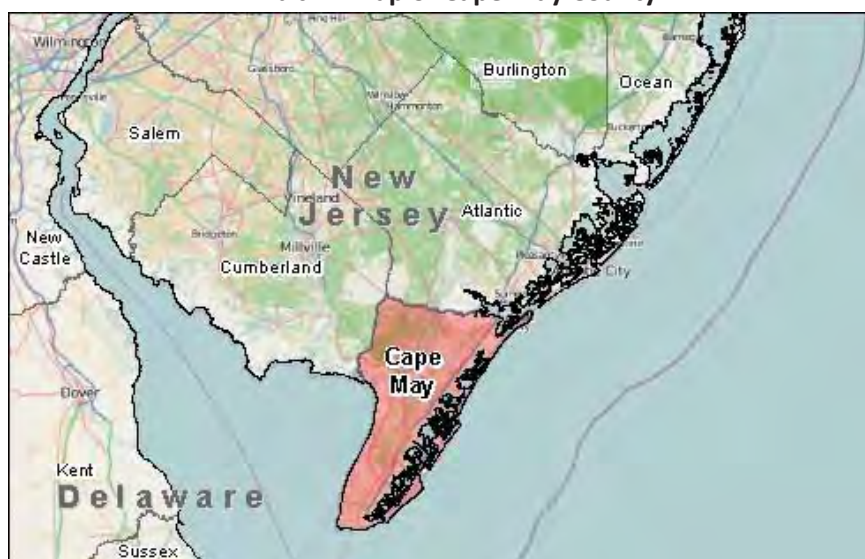
Cape May County, New Jersey is the southern-most county in New Jersey, and at the entrance to the Delaware Bay and the Delaware River. The County is considered one of the premiere remote beach destinations along the Mid-Atlantic Coast. The County is comprised of 16 cities and boroughs with below average population and housing densities. The largest city by population is Ocean City, with 11,701 people. The County has a population of 97,265 people (U.S. Census Bureau, 2010a). Cape May County's economy is highly dependent on summer tourism.

Tourism represents a sizable portion of the ocean economy. According to the National Oceanic and Atmospheric Administration, approximately 94.2 percent of all ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 88.7 percent of all ocean, recreation and tourism establishments are small (U.S. Census Bureau, 2009).¹ In 2009, there were 1,056 ocean-related establishments and 8,813 ocean-related jobs in the County (National Ocean Economics Program, 2012).

2. Location

Cape May County, shown in Exhibit 1, is the southern tip of New Jersey; its "cape" makes the outer peninsula of the Delaware Bay. It is approximately 85 miles to Philadelphia, Pennsylvania, 130 miles to Baltimore, Maryland (using ferry transportation), and 140 miles to Washington, D.C. (also using ferry transportation) (Google, Inc., 2012). The County has a land area of 620 square miles, and all but one of its 16 municipalities (Woodbine) border the Atlantic Ocean, the Delaware Bay, or the wetlands separating the mainland from the peninsula beach communities (U.S. Census Bureau, 2010a). Cape May County is bordered by Cumberland County and the Delaware Bay to the west, Atlantic County to the north, the Atlantic Ocean to the east, and Delaware across the Delaware Bay to the south.

Exhibit 1. Map of Cape May County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Cape May can be accessed by car via two major routes: Garden State Parkway, which spans the entire New Jersey Coast up to Newark, and New Jersey Route 55, which connects to Philadelphia, Pennsylvania (Google, Inc., 2012). The Cape May-Lewes Ferry operates a year-round passenger and car ferry across a 17-mile stretch of Delaware Bay to Maryland. The Cape May Airport serves private and charter flights only. The Atlantic City International Airport is the nearest commercial airport to Cape May, though the Philadelphia International Airport is the nearest major airport. There is no passenger rail to Cape May County (American Association of Public Transportation, 2012).

3. Demographics

Cape May County has a year-round population of 97,265 (U.S. Census Bureau, 2010a). The following three tables profile Cape May County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Cape May County's population has decreased over the past five years and is on average older than the state as a whole. Nearly 50 percent of the housing stock is for seasonal use.

Exhibit 2. Population Profile

	Cape May	New Jersey
Year-Round Population	97,265	8,791,894
Population Change (2000-2010)	-4.95%	4.49%
Median Age (years)	47.1	39.0
Percent Female	51.4%	51.3%
Percent Foreign Born	4.1%	20.3%
<i>Ethnic Profile</i>		
White	89.8%	68.6%
Black/African American	4.7%	13.7%
Asian	0.9%	8.3%
Hispanic/Latino	6.2%	17.7%
American Indian	0.2%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Cape May	New Jersey
Unemployment Rate	11.5%	10.8%
Percent Out of Labor Force	38.6%	33.4%
Median Household Income	\$53,392	\$37,681
Percent of Population Below Poverty Line	10.5%	10.3%
<i>Educational Attainment</i>		
High School Diploma	37.2%	29.5%
Bachelor's Degree	17.7%	22.1%
Graduate/Professional Degree	9.7%	13.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Cape May	New Jersey
Population Density (people/sq. mile)	386.9	1,195.5
Housing Density (structures/sq. mile)	391.1	483.2
Housing Structures that Are Independent Units	71.5%	64.0%
Occupied Units	41.5%	89.2%
Properties for Seasonal, Rec. or Occasional Use	49.7%	3.8%
Median House Value	\$337,300	\$357,000

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Leni-Lenape Tribe—descendants of the Paleo-Indians that came from Siberia over 30,000 years ago—originally inhabited the land that would become Cape May County. Early settlers, under the watch of William Penn, made efforts to engage in fair trade, and purchased much of the land from the Tribe. As more land purchases took place, the Lenape were forced to move north and west, and by the mid-18th century, there remained only a couple hundred Lenape peoples. Today, three federally-recognized Lenape Tribes exist in Oklahoma and Wisconsin; none remain in New Jersey (Cape May County Department of Tourism, 2012).

Cape May was originally explored between 1611 and 1614 by the Dutch explorer Cornelius Jacobsen May, but was not settled until several years later by the British colonists moving south from their colonies in New England. The habitants formed a stable fishing colony, but by the mid-18th century, vacationers from Philadelphia began populating the area, giving Cape May the title as the country’s oldest seaside resort. The 19th century ambience has remained in the area, and the importance of tourism has increased over the years. Today tourism accounts for approximately 65 percent of the economic base (Cape May County Department of Tourism, 2012; New Jersey Shore, 2012).

The Coast Guard Base in the borough of Cape May was once a naval base during World War II, and is now a Coast Guard boot camp and active search and rescue center. On several occasions throughout the tourist season, the base runs “Summer Sunset Parades.” The Cape May Spring Festival in April of each year celebrates the arrival of springtime, and encourages visitors to enjoy the sunshine by exploring the small towns, eating and drinking, and shopping throughout boutique shops (Cape May County Department of Tourism, 2012; New Jersey Shore, 2012).

5. Coastal Amenities

Cape May has 30 miles of shoreline. Cape May offers a diversity of coast options, including boardwalk beach, remote beach, or tidal wetlands. The County has 14 public beaches, six harbors, 32 marinas/boatyards, and six yacht clubs in the County (Cape May County Chamber of Commerce, 2012; The New Jersey Media Group, 2009). The Cape May National Wildlife Refuge encompasses 11,500 acres of grasslands, saltmarshes, and beachfront, and serves as a critical habitat for hundreds of thousands of migrating birds each year. Though this wildlife refuge is the only nationally-protected area in Cape May County, there are at least five more state-managed wildlife areas within the County’s limits (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Cape May County has two air and maritime war history museums, among the other museums that aim to preserve the historical nature of the region. The Naval Air Station Wildwood Aviation Museum and the Cape May Maritime Museum both celebrate the County’s past importance in each industry during war and in times of prosperity. Other attractions include villages and lighthouses, including the Cape

May Lighthouse, said to be the second oldest continually operating lighthouse in the United States (Cape May County Department of Tourism, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 3,869 business establishments in Cape May County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County in 2007 were Woodbine Developmental Center, a habilitation center for men with developmental diseases that employed 1,400 people, and Burdette Tomlin Memorial Hospital, which employed 1,080 people (The Press, 2007). Cape May's economy is highly dependent on commercial fishing, but even more so on summer tourism; during the summer season, tourists outnumber local residents by 9:1 (Jersey Personal Injury, 2011).

7. Coastal Tourism/Recreation Activity

Cape May has two boardwalk beaches (in Cape May and Wildwood), but the majority of the oceanfront property in the County is undeveloped, with few stores, beachside amenities, or amusement rides. The Travel Channel rated Ocean City's beach the Best Family Beach of 2005 and the Cape May Beach (one of the two boardwalk beaches) one of America's Top 10 Beaches in 2008, and Best Family Beach in 2012 (Travel Channel, 2012).

Activities at each beach depend on the type of beach being visited. The boardwalk beaches are busier, and visitors enjoy the shops, food, and rides, and walk along the boardwalk. While swimming and sunbathing do occur, it is not necessarily the principal draw to these beaches. The non-boardwalk beaches—which comprise the majority of the coastline in the County—are far more remote, and are ideal for sunbathing, swimming, and beachcombing. The outer waters nurture conditions suitable for surfing, sailing, and boating, whereas the inner wetlands provide ideal canoeing and kayaking conditions. Biking occurs throughout the County, whether through the small towns, along the boardwalks, or through trails within the nature preserves.

According to the National Oceanic and Atmospheric Administration, 94.2 percent of all ocean-related jobs in Cape May are related to tourism (National Oceanic and Atmospheric Administration, 2012). The New Jersey Office of Travel and Tourism estimates that in 2006, \$4.6 billion were generated by tourism, which accounts for 64 percent of the entire economic base (New Jersey Office of Travel and Tourism, 2012). There are 1,006 establishments dedicated to leisure and hospitality alone in Cape May County; the average weekly wage for employees of these establishments is \$381. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Cape May County increased by 15,364 jobs, or by over 350 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 88.7 percent of all ocean, recreation, and tourism establishments in Cape May County are small (U.S. Census Bureau, 2009).²

In 2009 there were 1,007 ocean-related establishments in Cape May County. As compared to the 1,056 establishments in the sector in 2000, the number of ocean-related establishments decreased by 4.6 percent in the nine years between 2000 and 2009. Employment grew by over 23 percent during this time, however: in 2009 there were 8,813 ocean-related jobs, as compared to 7,152 jobs in 2000 (National Ocean Economics Program, 2012).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

There are 211 hotels, 34 bed and breakfasts, and 32 campgrounds in Cape May County (U.S. Census Bureau, 2009). Roughly half of all houses in Cape May County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Where data were available, Exhibit 5 illustrates the extreme fluctuations in seasonal employment within each tourist-related industry.

Exhibit 5. Cape May County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	5	95	42	-25.0%
Marinas (713930)	86	354	218	11.8%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	56	127	96	100% [#]
Renting Pleasure Boats (532292)	0	0	55	3.8%
Land-Based				
Hotel Employment (72111)	666	3,389	1,840	-15.9%
Restaurant Employment (7221 & 7222)	2,484	10,980	5,651	12.0%
Amusement, Gambling, Other Recreation (713)	419	3,364	1,482	6.5%
General Tourism				
Travel Agencies (561510)	0	0	0	-100% [^]
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Boat Dealers was listed as 0 in 2005.

[^] BLS figure for Travel Agencies in 2005 was listed as 49.

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Hudson County, New Jersey

1. Synopsis

Hudson County, New Jersey is in northern New Jersey, across the Hudson River from Manhattan. The County is the smallest by land area in New Jersey, and is one of the most densely populated in the United States. Hudson County is comprised of only 12 municipalities, the largest of which is Jersey City with a population of 247,597. The County’s population is 634,266 people (U.S. Census Bureau, 2010a). The Hudson County waterfront is predominantly used for industrial, shipping, and transportation purposes.

Tourism represents a minor part of the ocean economy in Hudson County. According to the National Oceanic and Atmospheric Administration, 64.2 percent of the ocean-related jobs in the County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately three-quarters of ocean, recreation and tourism-related business in Hudson County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 1,226 ocean-related establishments and 15,978 ocean-related jobs in the County (National Ocean Economics Program, 2012).

2. Location

Hudson County, shown in Exhibit 1, sits along the Hudson River, and is comprised of several of the outer boroughs of the New York City area. The County has a total area of only 62 square miles, and seven of its 12 municipalities front the Hudson River (U.S. Census Bureau, 2010a). Hudson County is bordered by Essex County to the west, Richmond County to the south, Bergen County to the north, and the Hudson River and New York City to the east.

Exhibit 1. Map of Hudson County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As part of a major U.S. metropolitan area, Hudson County is easily accessible by car, rail, airplane, and ferry. Three major interstates run through the County, as well as several more U.S. and State Routes;

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

there is one tunnel and one bridge that cross the Hudson River into New York City (Google, Inc., 2012). Hudson County has a light rail that connects to neighboring Bergen County to the north, a subway system that connects to Manhattan, and a commuter rail that connects to both Newark and New York City (American Public Transportation Association, 2012). Amtrak has stations in nearby New York City and Newark, with routes to up and down the Atlantic Coast (Amtrak, Inc., 2012). Though no major airports are within the County's limits, Newark Liberty, LaGuardia, and John F. Kennedy Airports are all within 20 miles. There are several ferry terminals in the County, which service docks in New York City, as well as Ellis and Liberty Islands (American Public Transportation Association, 2012).

3. Demographics

Hudson County has a year-round population of 634,266 (U.S. Census Bureau, 2010a). The following three tables profile Hudson County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Hudson County's population has decreased drastically over the past five years. The population and, especially, the housing densities in Hudson County exceed those of the state. Hudson County is a more diverse population, and has more divided population by wealth than the average in New Jersey.

Exhibit 2. Population Profile

	Hudson	New Jersey
Year-Round Population	634,266	8,791,894
Population Change (2000-2010)	4.15%	4.49%
Median Age (years)	34.2	39.0
Percent Female	50.5%	51.3%
Percent Foreign Born	40.6%	20.3%
<i>Ethnic Profile</i>		
White	54.0%	68.6%
Black/African American	13.2%	13.7%
Asian	13.4%	8.3%
Hispanic/Latino	42.2%	17.7%
American Indian	0.6%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Hudson	New Jersey
Unemployment Rate	13.1%	10.8%
Percent Out of Labor Force	30.9%	33.4%
Median Household Income	\$54,817	\$37,681
Percent of Population Below Poverty Line	16.5%	10.3%
<i>Educational Attainment</i>		
High School Diploma	26.6%	29.5%
Bachelor's Degree	23.3%	22.1%
Graduate/Professional Degree	12.8%	13.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Hudson	New Jersey
Population Density (people/sq. mile)	13,731.4	1,195.5
Housing Density (structures/sq. mile)	5,852.7	483.2
Housing Structures that Are Independent Units	16.3%	64.0%
Occupied Units	91.2%	89.2%
Properties for Seasonal, Rec. or Occasional Use	0.5%	3.8%
Median House Value	\$383,900	\$357,000

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to the arrival of the European colonists in the 17th century, Hudson County was the territory of the Lenape Tribe, including the Hackensack, Tappan, Raritan, and Manhattan families. By the mid-1600's, relations became bitter between the Dutch colonists and the Lenape Tribe, and eventually led to what is considered one of the first genocides by colonists against Native populations in Kieft's War. The Dutch eventually purchased the remaining land from the Lenape, and gained full control of the area. By 1674, the Dutch had ceded control of the area to the English (Advameg, Inc., 2010; Hudson County Division of Tourism, 2012a).

In the late 19th and early 20th centuries, Hudson County saw great industrial, commercial, and residential growth that was fueled by the construction of ports and railroads, as well as the influx of immigrants. At this same time, millions of immigrants were entering the United States at Ellis Island, with many moving into Hudson County boroughs; the County became a common German and Irish immigrant destination. The area quickly grew into a manufacturing hub with the onslaught of a cheap workforce; North Hudson became known as the "embroidery capital of America." In the 1920's and 1930's, major infrastructure projects including several bridges and tunnels made the New York-New Jersey connection even quicker. Today, many residents within the County work in New York City, and alternatively, some living in New York City work in Hudson County (Hudson County Division of Tourism, 2012a).

Festivals and celebrations in Hudson County center on artistry. Several of the non-profit art organizations host events that promote arts and the area's professional artists, or otherwise celebrate its beauty. JC Fridays is a city-wide art celebration on the first Friday in March, with exhibits, shows, and other activities (Hudson County Division of Tourism, 2012b).

5. Coastal Amenities

Hudson County has no shoreline along the Atlantic Ocean, and has minimal shoreline along the Hudson River. Coastal areas of the County are densely developed by skyscrapers, residential buildings, port operations, or in the southern portions of the County, oil and chemical refineries; the County's coastline is almost entirely industrially developed. There are no beaches, harbors, or national parks in the County. There are six marinas and five yacht clubs in Hudson County. There are no national wildlife refuges, although the Hackensack Meadowlands Conservation and Wildlife Area is a 587-acre tract of land protects several federally and state listed species endangered or of concern (New Jersey Meadowlands Commission, 2012; U.S. National Park Service, 2012).

The Liberty State Park is visited by tourists and local residents. The Park provides a variety of recreational activities, including walking and biking along its paths, bird-watching in its fields, and fishing, boating, and kayaking through its calm tidal waters. The Liberty Science Center in the State Park provides a family-friendly educational environment regarding all aspects of science (New Jersey

Department of Environmental Protection, 2012). Although not in the County, Ellis Island and the Statue of Liberty (on Liberty Island) are nearby attractions that bring tourists to the area – several daily ferries to these tourist attractions leave from docks in Hudson County.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 12,732 business establishments in Hudson County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County (with the number of employees) are: United Parcel Services, Inc. (6,000), UBS Financial Services (5,572), and Bank of Tokyo Mitsubishi Trust (4,568) (The Press, 2007). Major industries of note in Hudson County include finance, the headquarters of packaged goods or retail companies, operations centers (including at port areas) of logistics companies, and oil refineries of some of the major oil distributors in the world.

7. Coastal Tourism/Recreation Activity

Coastal tourism and recreation is limited in Hudson County. The nearby Ellis Island and Statue of Liberty are major draws to the area; although the parks are located in New York, many tourists reach the parks by means of Hudson County ferries. Boating is one of the more common activities in the area – whether on a private yacht, chartered boat, or harbor cruise, the Hudson River is full of day and nighttime boating activity. Alternatively, some visitors enjoy taking “eco-cruises,” or nature-based cruises that include wildlife viewing and enjoyment of the natural scenery, through the Hackensack River and New Jersey Meadowlands area. The state of New Jersey is creating an 18-mile walkway along the shoreline, the Hudson River Waterfront Walkway, to provide unhindered access to the River (Hudson County, New Jersey, 2004).

According to the National Oceanic and Atmospheric Administration, only 64.2 percent of all ocean-related jobs in Hudson are related to tourism, a figure likely reduced by the County’s port and water taxi employment (National Oceanic and Atmospheric Administration, 2012). The New Jersey Office of Travel and Tourism estimates that visitors to the County spent a total of \$514 million in 2010, although much of this was likely spent at locations unrelated to the marine environment (New Jersey Office of Travel and Tourism, 2012). There are 1,404 establishments dedicated to leisure and hospitality alone in Hudson County; the average weekly wage for employees of these establishments is \$420. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Hudson County increased by only 385 jobs, or a mere 2.7 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that approximately three out of four ocean, recreation, and tourism establishments in Hudson County are small (U.S. Census Bureau, 2009).²

In 2009, 1,226 ocean-related establishments in Hudson County employed 15,978 people. Although the number of establishments increased at a rapid pace between 2000 and 2009, the number of people employed increased only modestly. In 2000, there were 922 ocean-related establishments and 15,875 people employed in the sector. Between 2000 and 2009, the number of ocean-related establishments increased by 30 percent, but the number of people employed in the ocean economy increased only 0.7 percent (National Ocean Economics Program, 2012).

There are 44 hotels, no bed and breakfasts, and only one campground in Hudson County (U.S. Census Bureau, 2009). According to the U.S. Census, less than one percent of all houses in the County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry. The data in Exhibit 5 further shows relatively stable tourism-related employment levels year-round, with only slight increases in summer months (U.S. Bureau of Labor Statistics, 2010).

Exhibit 5. Hudson County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	-100% [#]
Marinas (713930)	58	86	71	-20.2%
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	1,544	1,676	1,656	30.7%
Restaurant Employment (7221 & 7222)	9,354	9,900	9,906	15.6%
Amusement, Gambling, Other Recreation (713)	724	991	885	58.9%
General Tourism				
Travel Agencies (561510)	165	158	161	-14.4%
Tour Operators (561520)	6	11	9	-43.8%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Scenic and Sightseeing Transportation, Water was listed as 67 in 2005.

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Monmouth County, New Jersey

1. Synopsis

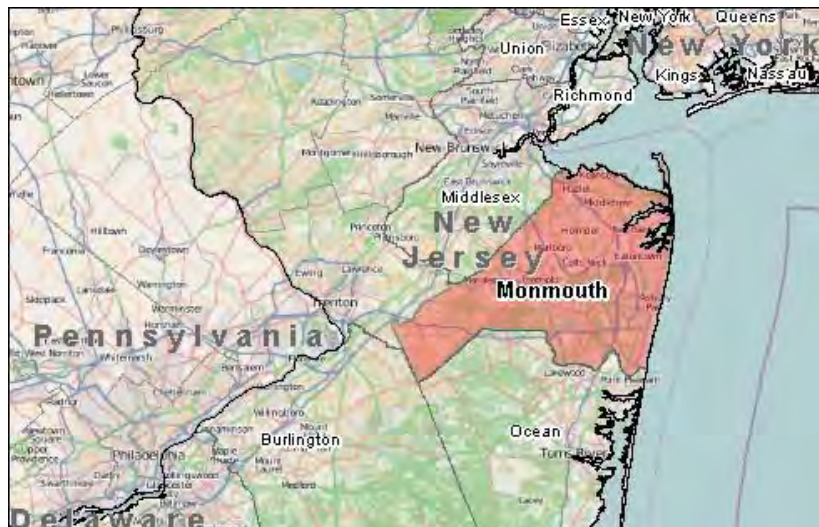
Monmouth County lies in central New Jersey, as the southern landmass along Lower Bay and Sandy Hook Bay. The County is comprised of 53 cities, townships, and boroughs, 23 of which are on the Atlantic Ocean, Sandy Hook Bay, or the Lower Bay. In most cases, Monmouth County’s coastal municipalities are much smaller and almost all chartered as cities, whereas the land-locked municipalities are much larger and almost all chartered as townships. The largest municipality by population is Middletown Township, with 11,701 residents; the County’s population is 630,380 people (U.S. Census Bureau, 2010a).

Tourism represents a significant portion of the ocean economy. According to the National Oceanic and Atmospheric Administration, 94.6 percent of all ocean-related jobs in Monmouth County are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 75 percent of all ocean, recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 1,029 ocean-related establishments in Monmouth County, an increase of 45.3 percent from 708 establishments in 2000 (National Ocean Economics Program, 2012).

2. Location

Monmouth County, shown in Exhibit 1, is the northern-most county in New Jersey along the Atlantic Ocean. It is approximately 50 miles to New York City and 75 miles to Philadelphia, Pennsylvania (Google, Inc., 2012). The County has a total area of 665 square miles (U.S. Census Bureau, 2010a). Monmouth County is bordered by Middlesex County to the west, Ocean County to the south, Richmond County, New Jersey and Kings County New York across the Lower Bay to the north, and the Atlantic Ocean to the east.

Exhibit 1. Map of Monmouth County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Monmouth County is accessible to New York, Trenton, and Philadelphia by major routes such as Interstate-195, Interstate-95, and Garden State Parkway (Google, Inc., 2012). Ferry lines from Monmouth County leave from two points within the County, with direct routes to several terminals in New York City and the City's outlying boroughs, and one indirect route to Martha's Vineyard, Massachusetts (American Public Transportation Association, 2012). There are no rail lines or major airports that service Monmouth County, though hubs for each (including three international airports) are in the nearby New York City metropolitan area.

3. Demographics

Monmouth County has a year-round population of 630,380 (U.S. Census Bureau, 2010a). The following three tables profile Monmouth County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Monmouth County's population has grown at roughly half the rate of the state of New Jersey's. The County is very wealthy and homes in the County are high-priced, on average.

Exhibit 2. Population Profile

	Monmouth	New Jersey
Year-Round Population	630,380	8,791,894
Population Change (2000-2010)	2.45%	4.49%
Median Age (years)	41.3	39.0
Percent Female	51.4%	51.3%
Percent Foreign Born	13.0%	20.3%
<i>Ethnic Profile</i>		
White	82.6%	68.6%
Black/African American	7.4%	13.7%
Asian	5.0%	8.3%
Hispanic/Latino	9.7%	17.7%
American Indian	0.2%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Monmouth	New Jersey
Unemployment Rate	8.7%	10.8%
Percent Out of Labor Force	33.1%	33.4%
Median Household Income	\$80,816	\$37,681
Percent of Population Below Poverty Line	6.6%	10.3%
<i>Educational Attainment</i>		
High School Diploma	26.3%	29.5%
Bachelor's Degree	25.5%	22.1%
Graduate/Professional Degree	15.4%	13.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Monmouth	New Jersey
Population Density (people/sq. mile)	1,344.7	1,195.5
Housing Density (structures/sq. mile)	551.2	483.2
Housing Structures that Are Independent Units	74.9%	64.0%
Occupied Units	90.5%	89.2%
Properties for Seasonal, Rec. or Occasional Use	4.3%	3.8%
Median House Value	\$424,800	\$357,000

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

As is the case in much of New Jersey, the Leni-Lenape Tribe originally lived on the land that would become Monmouth County. Early settlers engaged in fair trade and progressively purchased of the majority of the land from the Tribe. As more land purchases took place, the Lenape were forced to move north and west. Today, three federally-recognized Lenape Tribes exist in Oklahoma and Wisconsin; none remain in New Jersey (Monmouth County Life, 2011).

Monmouth County was first explored by the Dutch at the turn of the 17th century, but settled by the English around mid-century. The region was an important stronghold held by the British during the American Revolution, but the Battle of Monmouth in 1778 marked a turning point in the war, as General George Washington’s troops had fought the British to a standstill for the first time. The Monmouth County Historical Association houses a collection of documents regarding this battle. The colonial charm of Monmouth County is still evident in the area today (Our Monmouth, 2008).

The Seafood Festival in Belmar, which attracts scores of local residents as well as visitors, will celebrate its 26th annual event. The weekend-long event features chefs from the area’s 45+ restaurants cooking their favorite seafood recipes (The Borough of Belmar New Jersey, 2011). Other popular activities in the County include a jazz festival, a county fair, and periodic movies on the beaches and in the County’s parks (Monmouth County Life, 2012).

5. Coastal Amenities

Monmouth has 27 miles of shoreline along the Atlantic Ocean and 26 miles of coastline along Raritan Bay (Monmouth County, NJ, 2010). The County has 18 public beaches (though almost all require a permit), one harbor, 24 marinas & boatyards, and seven yacht clubs (GoKids, 2012; The New Jersey Media Group, 2012). The Gateway National Recreation Area is a 26,000 acre park in Sandy Hook (Monmouth County), Jamaica Bay (New York), and Staten Island (New York). The Sandy Hook peninsula is 1,665 acres and is home to over 300 species of birds. There are no National Wildlife Refuges, and no federally-protected land in the County, but several state parks, trails, and historic sites (U.S. Fish and Wildlife Service, 2012).

Sandy Hook, part of the Gateway National Recreation Area is the County’s most popular attraction, drawing over two million visitors per year (U.S. National Park Service, 2012). On the peninsula lie Fort Hancock and the Sandy Hook Lighthouse, both landmarks dating back to the 19th century. Fort Hancock was built to protect New York Harbor prior to and during World War II, and also housed some of the largest and most advanced anti-submarine and anti-aircraft artillery at the time. In the Highlands above Sandy Hook Harbor sits a brownstone double lighthouse – the Twin Lights – that was built in 1862 to prevent shipwrecks near land. Although not as well visited as Sandy Hook, the historic monument attracts thousands of history enthusiasts each year (U.S. National Park Service, 2012).

6. General Economic Situation

The largest employers in the County are Meridian Health Systems, which employs approximately 9,700 people, the U.S. Army Communications Electronics Command Fort Monmouth (CECOM), which employs 5,572 people, and the County of Monmouth, which employs 3,319 people (The Press, 2007).

7. Coastal Tourism/Recreation Activity

Monmouth County beaches are diverse and offer a range of amenities. Several of the County's beaches have boardwalks that range from active stretches with several music venues, bars, and shops such as in Asbury Park, to quieter boardwalks with no shops, such as in Bradley. Nonetheless, the coastline in the County is almost entirely white sand, an ideal environment for sunbathing, beachcombing, swimming, and beach fun. The Sandy Hook region of the Gateway National Recreation Area attracts more than two million visitors per year. Tourists enjoy the deactivated Fort Hancock and Sandy Hook Lighthouse, and access to nature areas and numerous recreation facilities. The remote, white-sand beaches attract those seeking activities such as swimming, picnicking, and sunbathing, and the waters within and outside the bay attract fishermen, scuba divers, surfers, and wind surfers. Sandy Hook and Monmouth County's Atlantic beaches are popular surfing destinations in the fall when the waves are ideal for the activity.

According to the National Oceanic and Atmospheric Administration, 94.6 percent of all ocean-related jobs in Monmouth are related to tourism (National Oceanic and Atmospheric Administration, 2012). The New Jersey Office of Travel and Tourism estimates that in 2010, tourism accounted for \$1.9 billion of economic activity (including direct and indirect expenditures) (New Jersey Office of Travel and Tourism, 2012). There are 1,981 establishments dedicated to leisure and hospitality alone in Monmouth County; the average weekly wage for employees of these establishments is \$348. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Monmouth County increased by 8,365 jobs, or 33 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that approximately 75 percent of all ocean, recreation, and tourism establishments in Monmouth County are small (U.S. Census Bureau, 2009).²

In 2009, 1,029 establishments in the ocean economy employed 10,502 people. In 2000, 708 ocean-related establishments employed 7,304 people; between 2000 and 2009, the number of ocean-related establishments therefore grew by 45.3 percent and the number of people employed by these establishments grew 43.8 percent (National Ocean Economics Program, 2012).

There are 67 hotels, 18 bed and breakfasts, and five campgrounds in Monmouth County (U.S. Census Bureau, 2009). According to the U.S. Census, just over four percent of all houses in Monmouth County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry. The data in Exhibit 5 further illustrates the relative stability of employment year-round; although employment increases in summer months, the change is not drastic.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Monmouth County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	80	130	104	477.8%
Marinas (713930)	93	172	135	-14.6%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	53	80	68	-43.3%
Renting Pleasure Boats (532292)	0	0	0	-100% [#]
Land-Based				
Hotel Employment (72111)	1,169	1,475	1,285	11.3%
Restaurant Employment (7221 & 7222)	15,517	19,008	17,079	9.2%
Amusement, Gambling, Other Recreation (713)	4,460	7,652	5,721	17.5%
General Tourism				
Travel Agencies (561510)	154	145	148	-23.7%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Boat Dealers was listed as 120 in 2005.

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Ocean County, New Jersey

1. Synopsis

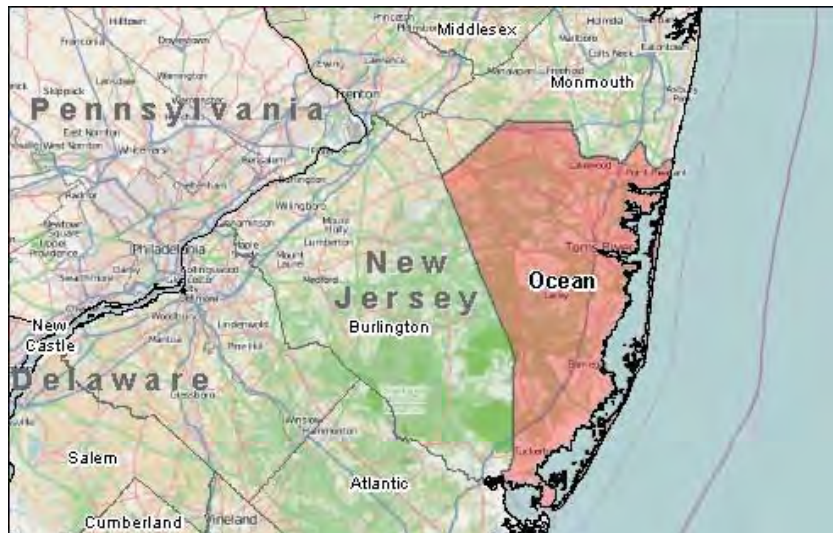
Ocean County, New Jersey is the county in the center of the Jersey Shore region, which offers a mix between remote beaches, popular boardwalk beaches, and wildlife viewing areas in forests, wetlands, and beaches. The County is comprised of 33 cities, townships, towns, and boroughs with population and housing densities that mirror the state of New Jersey's. The largest municipality by population is Jackson Township, with a population of 54,856 residents. The County's population is 576,567 people (U.S. Census Bureau, 2010a). Ocean County's economy is highly dependent on summer tourism.

Tourism represents a major portion of the ocean economy in the County, in particular. According to the National Oceanic and Atmospheric Administration, 96 percent of all ocean-related jobs in the county are related to tourism (National Oceanic and Atmospheric Administration, 2012). Over 80 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, there were 1,136 ocean-related establishments and 11,589 ocean-related jobs in Ocean County (National Ocean Economics Program, 2012).

2. Location

Ocean County, shown in Exhibit 1, is a central county along New Jersey's Atlantic Coast. It is approximately 30 miles east of Trenton, 50 miles east of Philadelphia, Pennsylvania, and 70 miles south of New York City (Google, Inc., 2012). The County has a land area of 916 square miles, and only four of the County's 33 municipalities do not border the Atlantic Ocean or one of the several bays and harbors separating the central land mass from the outer peninsula towns (U.S. Census Bureau, 2010a). Ocean County is bordered by Monmouth County to the north, Burlington County to the west, Atlantic County to the south, and the Atlantic Ocean to the east.

Exhibit 1. Map of Ocean County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Ocean County is most accessible by the Garden State Parkway, which runs north to south along the entire coast of New Jersey. Interstate-195, crosses through the most northern section of the County, which continues west to Trenton (Google, Inc., 2012). There are a few smaller airports in the County,

but none that offer commercial service; Trenton has two mid-sized airports that are between 30 and 40 miles from Ocean County, but the nearest international airport is in Philadelphia, or approximately 60 miles west (American Public Transportation Association, 2012). There are currently no rail or ferry routes that service Ocean County, though the County is considering a ferry service between Tuckerton and Beach Haven (across Little Egg Harbor) (Weaver, 2011).

3. Demographics

Ocean County has a year-round population of 576,567 (U.S. Census Bureau, 2010a). The following three tables profile Ocean County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Ocean County has grown drastically (nearly 13 percent), over the last decade.

Exhibit 2. Population Profile

	Ocean	New Jersey
Year-Round Population	576,567	8,791,894
Population Change (2000-2010)	12.9%	4.49%
Median Age (years)	42.6	39.0
Percent Female	52.1%	51.3%
Percent Foreign Born	7.8%	20.3%
<i>Ethnic Profile</i>		
White	91.0%	68.6%
Black/African American	3.2%	13.7%
Asian	1.7%	8.3%
Hispanic/Latino	8.3%	17.7%
American Indian	0.2%	0.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Ocean	New Jersey
Unemployment Rate	11.0%	10.8%
Percent Out of Labor Force	40.8%	33.4%
Median Household Income	\$57,128	\$37,681
Percent of Population Below Poverty Line	11.2%	10.3%
<i>Educational Attainment</i>		
High School Diploma	38.9%	29.5%
Bachelor's Degree	16.8%	22.1%
Graduate/Professional Degree	8.0%	13.3%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Ocean	New Jersey
Population Density (people/sq. mile)	917.0	1,195.5
Housing Density (structures/sq. mile)	442.2	483.2
Housing Structures that Are Independent Units	87.0%	64.0%
Occupied Units	79.5%	89.2%
Properties for Seasonal, Rec. or Occasional Use	4.3%	3.8%
Median House Value	\$294,100	\$357,000

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Leni-Lenape Tribe—descendents of the Paleo-Indians that came from Siberia over 30,000 years ago—originally inhabited the land that would become Ocean County. Early settlers engaged in trades with the Natives and purchased much of the land from the Tribe. As more land purchases took place, the Lenape were forced to move north and west, and by 1740, there remained only a couple hundred Lenape peoples in southern New Jersey. Today, three federally-recognized Lenape Tribes exist in Oklahoma and Wisconsin; none remain in New Jersey (Ocean County Cultural and Heritage Commission, 2008; Ocean County, New Jersey Government, 2009).

The first European to arrive in the area which now comprises the County was Dutch navigator Cornelius Hendrickson and his crew aboard the ship *Onrust*. In 1664, however, the Dutch surrendered the land to the British, and the area soon after grew as a colony under British rule until the Revolutionary War began in 1776. In the late 18th and early 19th century, the region was a strong fishing and whaling center, and with that came much wealth. The illegalization of whaling in 1820 forced the area to focus its efforts on fishing and, in part, on manufacturing. In the 1880s, the County experienced a building boom, in particular, of hotels meant to support the new summer visitors that arrived each year on new railroad connecting Ocean County to Philadelphia. Ocean County has been a tourist destination ever since (Ocean County Cultural and Heritage Commission, 2008; Ocean County, New Jersey Government, 2009).

Annual events that celebrate Ocean County’s maritime traditions include the Baymen’s Seafood and Music Festival, an event filled with all kinds of the region’s famous seafood, the Barnegat Bay Festival, and environmental festival about the maritime heritage, and the wooden boat festival, where nautical vendors compliment games, food, and boat rides (Barnegat Bay Partnership, 2010; The Tuckerton Seaport, 2006).

5. Coastal Amenities

Ocean County has 45 miles of shoreline along New Jersey’s southern coast (Ocean County, New Jersey Government, 2009). The County has 19 ocean-front beaches, six harbors, nearly 50 marinas & boatyards, and 27 yacht clubs (Ocean County Tourism, 1995). Ocean County shares a smaller portion of the 23,000-acre Edwin B. Forsythe National Wildlife Refuge with Atlantic County to the south. Though this wildlife refuge comprises the only nationally-protected area in Ocean County, there are several other state and county parks and wildlife refuges (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Attractions in Ocean County—aside from the numerous beaches, wildlife refuges, and parks—include several lighthouses and the Tuckerton Seaport, a working maritime village and museum. The village opened in May of 2000, and features 17 historic recreated buildings connected by a boardwalk (The Tuckerton Seaport, 2006). A major non-coastal attraction in the County is the Six Flags Great Adventure theme park, which features the one of the world’s tallest roller coaster (Six Flags Great Adventure, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 11,907 business establishments in Ocean County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employers in the County (with the number of employees) are as follows: Saint Barnabus Health Care Systems (4,703); Six Flags Theme Parks, Inc. (4,340); and Naval Warfare Center (3,288) (The Press, 2007).

7. Coastal Tourism/Recreation Activity

Ocean County's beaches are a mix between remote, undeveloped stretches and more populated, boardwalk beaches with shops, restaurants, and amusement rides. The boardwalk beaches are located on the central, more accessible areas of the barrier beaches, whereas the more remote beaches are less accessible. The majority of tourism to Ocean County is focused on these barrier beaches, as well as on the wooded, wetland, and shoreline wildlife areas. Activities at the beaches include sunbathing, swimming, beachcombing, and in the case of the beaches with boardwalks, shopping and walking along the boardwalk. The barrier beaches provide an excellent shelter to the bays and harbors between the beaches and the mainland, and thus varied and abundant wildlife can be seen.

The National Oceanic and Atmospheric Administration states that nearly 96 percent of all ocean-related jobs in Ocean County are related to tourism (National Oceanic and Atmospheric Administration, 2012). The New Jersey Office of Travel and Tourism estimates that in 2010, tourism accounted for over \$3.3 billion in direct and indirect spending in the County (New Jersey Office of Travel and Tourism, 2011). There are 1,350 establishments dedicated to leisure and hospitality alone in Ocean County; the average weekly wage for employees of these establishments is \$318. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Ocean County increased by 12,161 jobs, or by over 88 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that just over 80 percent of all ocean, recreation, and tourism establishments in Ocean County are small (U.S. Census Bureau, 2009).¹

In 2009, 1,136 ocean-related establishments in Ocean County employed 11,589 people. In 2000, 952 ocean-related establishments employed 9,664 people. In the nine years between 2000 and 2009, the number of ocean-related establishments and the number of people employed in the ocean sector therefore grew by approximately 20 percent (National Ocean Economics Program, 2012).

According to the 2010 U.S. Census, there are 84 hotels, six bed and breakfasts, and 11 campgrounds in Ocean County (U.S. Census Bureau, 2009). Only 4.3 percent of all houses in Ocean County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 further illustrates marked rise in tourism-related employment in summer months.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Ocean County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	68	43	10.3%
Marinas (713930)	217	439	343	-24.3%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	186	341	279	-22.1%
Renting Pleasure Boats (532292)	0	90	33	100% [#]
Land-Based				
Hotel Employment (72111)	616	1,374	904	17.1%
Restaurant Employment (7221 & 7222)	9,177	13,230	10,660	18.0
Amusement, Gambling, Other Recreation (713)	2,465	8,436	5,072	2.8%
General Tourism				
Travel Agencies (561510)	113	106	107	13.8
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Renting Pleasure Boats was listed as 0 in 2005.

[^] BLS figure for Travel Agencies in 2005 was listed as 49.

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Kings County, New York

1. Synopsis

Kings County, New York has the same boundaries as the City of Brooklyn, and thus has only one city. Brooklyn is just south of Manhattan, along the Upper Bay and the East River. The County is the most populous of the five New York City Boroughs, the most populous County in New York State, and the second-most densely populated county in the United States, after New York County. Kings County's population is 2,504,700 (U.S. Census Bureau, 2010a). Beach tourism in Kings County is almost non-existent, although other forms of coastal tourism do exist. Coney Island Beach – a lengthy beach and amusement park along the boardwalk – is Kings County's largest and most popular ocean-side attraction, and the Coney Island immediate area is highly dependent on the beach and amusement tourism.

A large percentage of Kings County's ocean economy is dedicated to tourism and recreation: according to the National Oceanic and Atmospheric Administration, approximately 89.4 percent of all ocean-related jobs are related to tourism and recreation (National Oceanic and Atmospheric Administration, 2012). 84.4 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 2,346 establishments in the ocean economy employed 16,910 people (National Ocean Economics Program, 2012).

2. Location

Kings County, shown in Exhibit 1, is the southwestern-most county on Long Island, south of Manhattan. The County has a total area of 96.9 square miles (U.S. Census Bureau, 2010a). Kings County is bordered Hudson County, New Jersey and Richmond County, New York adjacent to the Upper Bay to the west, Manhattan/New York County adjacent to the East River to the north, Queens County and the outer points of Long Island to the east, and the Lower New York Bay to the south.

Exhibit 1. Map of Kings County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As one of New York City's five major boroughs, the area is accessible by car, air, rail, and water. Four bridges and one tunnel connect the County to New York City and Richmond County (Staten Island);

Interstate-278 is the only interstate highway, though other major routes do pass through the County (Google, Inc., 2012). Only one ferry Route services the County, despite the high number of ferries in the area, and connects Brooklyn’s northwest region to E 34th Street in Manhattan. There are no airports within the County’s limits, although the John F. Kennedy International Airport lies just over the border in neighboring Nassau County. There are two other major international airports in the region as well. Rail service includes New York City’s subway, as well as the Amtrak stop at Penn Station in neighboring Manhattan (American Public Transportation Association, 2012; Amtrak, Inc., 2012).

3. Demographics

Kings County, better known as Brooklyn Borough, has a year-round population of 2,504,700 (U.S. Census Bureau, 2010a). The following three tables profile Brooklyn’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Kings County’s population is enormous; it is the most populous county in New York State, and the second most densely populated nationwide. Kings County is a diverse area with high real estate prices.

Exhibit 2. Population Profile

	Kings	New York
Year-Round Population	2,504,700	19,378,102
Population Change (2000-2010)	1.60%	2.12%
Median Age (years)	34.1%	38.0
Percent Female	52.8	51.6%
Percent Foreign Born	37.4%	21.7%
<i>Ethnic Profile</i>		
White	42.8%	65.7%
Black/African American	34.3%	15.9%
Asian	10.5%	7.3%
Hispanic/Latino	19.8%	17.6%
American Indian	0.5%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Kings	New York
Unemployment Rate	10.9%	9.9%
Percent Out of Labor Force	38.4%	36.5%
Median Household Income	\$46,671	\$54,148
Percent of Population Below Poverty Line	23.0%	14.9%
<i>Educational Attainment</i>		
High School Diploma	29.0%	27.7%
Bachelor’s Degree	17.9%	18.6%
Graduate/Professional Degree	10.7%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Kings	New York
Population Density (people/sq. mile)	35,369.1	411.2
Housing Density (structures/sq. mile)	14,124.4	172.1
Housing Structures that Are Independent Units	14.3%	49.4%
Occupied Units	91.7%	88.8%
Properties for Seasonal, Rec. or Occasional Use	0.4%	3.6%
Median House Value	\$562,400	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Dutch were the first Europeans to settle the area in 1624. At the time, the Lenape people—a seasonal-migratory group who had a successful fishing village in Brooklyn—inhabited the area. However, in 1664, a British conquest took control of the area from the Dutch. Brooklyn grew significantly in the first half of the 19th century – between 1800 and 1820, the County’s population tripled, and again doubled each of the following two decades. The County sustained growth with the building of rail links in 1878, and the completion of the Brooklyn Bridge, in 1883, which ensured its connection to Manhattan. In 1898, Brooklyn officially became one of the five boroughs of New York City (Brooklyn Tourism and Visitors Center, 2012).

As a major population hub, Brooklyn has several events and festivals throughout the year to celebrate the history, heritage, ethnicities, and livelihoods of the local population and area. The festivals range from smaller, block-party like celebrations to larger festivities in parks and city-owned property. One of the waterfront festivals is the Red Hook Waterfront Arts Festival, which is the annual kick off to summer that features dance, music, and poetry (New York City Department of Parks and Recreation, 2012).

5. Coastal Amenities

Brooklyn has only minimal coastline along the Atlantic Ocean; most of the County’s borders are on the East River or within the Upper or Lower New York Bay. The County has only two public beaches, six harbors, 10 marinas and boatyards, and six yacht clubs (New York City Department of Parks and Recreation, 2012). There are no state or national wildlife refuges, though the Jamaica Bay Wildlife Refuge is visible from the County’s shore, which the New York Parks Department claims to be “one of the best places” to see over 330 migrating bird species in New York City (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012; New York City Department of Parks and Recreation, 2012).

Popular local resident and tourist areas of interest within the County include: the New York Transit Museum, which chronicles the history of New York City’s subway system, Prospect Park, a 585-acre wooded and grassy park in central Brooklyn, and Coney Island, the only beachside amusement destination in the New York City boroughs (Luna Park at Coney Island, 2012; New York City Department of Parks and Recreation, 2012; New York City Transit Museum, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 46,445 business establishments in Brooklyn in 2010 (U.S. Bureau of Labor Statistics, 2010). Less than half of Brooklyn’s employed population works within the borough, thus economic conditions in the surrounding counties influence the situation within the County. Brooklyn has a large labor force in services, retail, and construction.

7. Coastal Tourism/Recreation Activity

Nearly all of Brooklyn's coastline is used for industrial purposes. However, the County has two connected beaches on the southern shore—Brighton Beach and the three-mile-long Coney Island Beach—and the separate (though close) Manhattan Beach. Bordering dense infrastructure, high populations, and major expressways, Coney Island is separated by its lengthy boardwalk and large amusement park, minor league baseball field, and the New York Aquarium. These beaches and boardwalk area are extremely crowded in the summer, but foster activities such as walking, playing volleyball and basketball, sunbathing, and swimming, despite the more industrial waters of the New York City area. The beaches are accessible by New York City's subway system, and are generally only visited by local populations.

According to the National Oceanic and Atmospheric Administration, 89.4 percent of all ocean-related jobs in Kings are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 4,582 establishments dedicated to leisure and hospitality alone in Brooklyn; the average weekly wage for employees of these establishments is \$398. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Brooklyn increased by 4,187 jobs, or by only 15 percent, indicating the year-round presence of the tourism economy (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 84.4 percent of all ocean, recreation, and tourism establishments in Kings County are small (U.S. Census Bureau, 2009).¹

In 2009, 2,346 establishments dedicated to the ocean economy in Kings County employed 16,910 people. Both the number of establishments and the number of people employed in the ocean economy grew by approximately 65 percent between 2000 and 2009. In comparison, in 2000, 1,429 establishments employed 10,254 people in the sector (National Ocean Economics Program, 2012).

According to the U.S. Census Bureau, there are 40 hotels, six bed and breakfasts, and seven campgrounds in Kings County (U.S. Census Bureau, 2009). Less than one half of a percent of all houses in Brooklyn are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, though this industry depends greatly on the local population as well (U.S. Census Bureau, 2010). Of particular interest is that the hotel industry, as compared to the size of the economy in Brooklyn, is not very large.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Kings County (Brooklyn) Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	61	48	200%
Marinas (713930)	0	0	0	0
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	-	-	-	-
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	808	830	836	100% [#]
Restaurant Employment (7221 & 7222)	20,897	23,060	22,510	32.8%
Amusement, Gambling, Other Recreation (713)	1,578	2,889	1,857	-1.1%
General Tourism				
Travel Agencies (561510)	414	475	453	0.2%
Tour Operators (561520)	75	72	77	-17.2%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	65	64	-5.9%

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Hotel Employment was listed as 0 in 2005.

[^] BLS figure for Travel Agencies in 2005 was listed as 49.

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Nassau County, New York

1. Synopsis

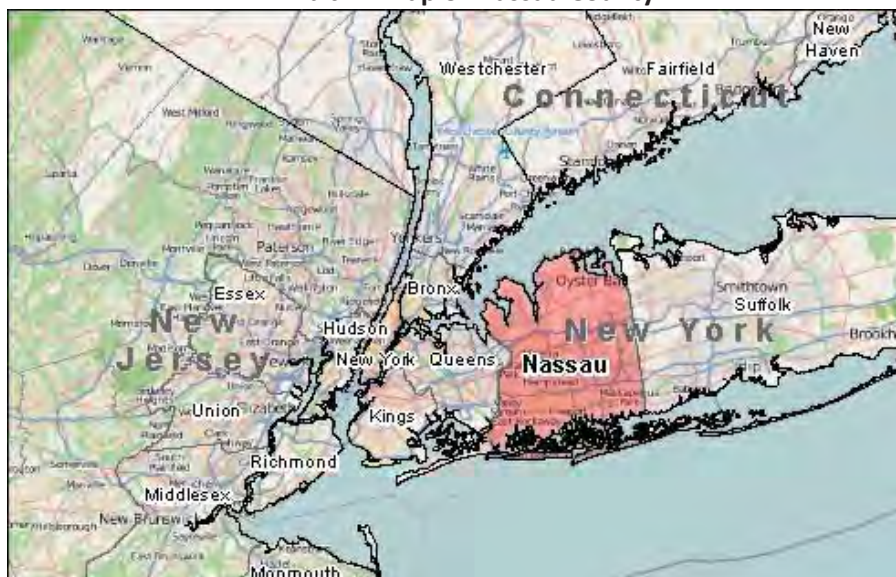
Nassau County, New York is the central county on Long Island Sound, just 20 miles to Manhattan. Its northern shore sits inside the Long Island Sound and its southern shore borders the open Atlantic Ocean. The County is densely populated, but much of its southern coast is comprised of sandy barrier beaches protecting national and state wildlife reserves. The County is comprised of two cities, three towns, and 64 incorporated areas. The County's population is 1,339,532 people (U.S. Census Bureau, 2010a).

Tourism represents a large percentage of the ocean economy in Nassau County. According to the National Oceanic and Atmospheric Administration, 92.3 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 74.2 percent of all ocean recreation tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 1,150 ocean-related establishments in Nassau County employed 12,374 people (National Ocean Economics Program, 2012).

2. Location

Nassau County, shown in Exhibit 1, is on Long Island, directly west of New York City. The County has a total area of 453 square miles, and the majority of its 69 municipalities are inland (U.S. Census Bureau, 2010a). Nassau County is bordered by Queens County to the west, Suffolk County to the east, Long Island Sound and the adjacent Fairfield County, Connecticut to the north, and the Atlantic Ocean to the south.

Exhibit 1. Map of Nassau County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Nassau County is somewhat less accessible than the five New York City boroughs, though still accessible by all modes of transportation. Interstate-495 and N.Y. Route 27 run east to west, to the tip of Long Island. Other major expressways run through the County as well (Google, Inc., 2012). Although no major airports are located in Nassau County, the John F. Kennedy International Airport is just over the border in Queens County, and two other NYC airports are in close proximity. Although neither regional rails or the New York City subway system run through Nassau County, the subway can be caught in Queens, and the Amtrak at Penn Station in Manhattan. The Long Island Rail Road has nearly 100 stops throughout Long Island, and connects to Penn Station in Manhattan. There are no ferries in Nassau, though there are several ferry routes in the area (American Public Transportation Association, 2012; Amtrak, Inc., 2012; Metropolitan Transportation Authority, 2012).

3. Demographics

Nassau County has a year-round population of 1,339,532 (U.S. Census Bureau, 2010a). The following three tables profile Nassau County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Nassau County is a densely populated county with a great amount of wealth.

Exhibit 2. Population Profile

	Nassau	New York
Year-Round Population	1,339,532	19,378,102
Population Change (2000-2010)	0.37%	2.12%
Median Age (years)	41.1	38.0
Percent Female	51.6%	51.6%
Percent Foreign Born	20.7%	21.7%
<i>Ethnic Profile</i>		
White	73.0%	65.7%
Black/African American	11.1%	15.9%
Asian	7.6%	7.3%
Hispanic/Latino	14.6%	17.6%
American Indian	0.2%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Nassau	New York
Unemployment Rate	8.8%	9.9%
Percent Out of Labor Force	34.7%	36.5%
Median Household Income	\$91,104	\$54,148
Percent of Population Below Poverty Line	7.6%	14.9%
<i>Educational Attainment</i>		
High School Diploma	24.9%	27.7%
Bachelor's Degree	22.8%	18.6%
Graduate/Professional Degree	18.5%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Nassau	New York
Population Density (people/sq. mile)	4,704.8	411.2
Housing Density (structures/sq. mile)	1,644.9	172.1
Housing Structures that Are Independent Units	79.1%	49.4%
Occupied Units	95.8%	88.8%
Properties for Seasonal, Rec. or Occasional Use	0.9%	3.6%
Median House Value	\$487,900	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original Native population of Nassau County were members of the Massapequa, Merioke and Rockaway Indian Tribes, and existed for over 9,000 years before the arrival of the Europeans in the 1640's. The Tribe was well-adapted to the area as fishers, farmers, and hunters of the plentiful deer population on the island. Diseases from the Europeans, land sales, and northward migration reduced the size of the tribe significantly (Nassau County, 2011). No tribes remain today in Nassau County.

The Dutch were the first Europeans to settle the area in the early 1620's. In the mid-17th century, the British took control of the area from the Dutch. The growth of surrounding counties, namely the five New York City boroughs, forced growth upon Nassau County; in the second half of the 20th century, Nassau County's population rose, as city dwellers sought a more suburban setting. The population rise was especially pronounced in the southern portions of the County. Nassau County now has notoriously high property taxes, and is one of the wealthiest counties in the United States (Nassau County, 2011).

Throughout the year, Nassau County villages host several festivals, including many that commemorate their heritages (many Irish), a handful that celebrate the arrival of spring, and others that celebrate the importance of the marine environment. The favorite and well-known festival is the Long Island Oyster Festival, hosted by the Oyster Bay Rotary Club. In 2011, the festival had 200,000 visitors to the two-day event in October (Rotary International, 2011).

5. Coastal Amenities

Nassau has 188 miles of shoreline (Nassau County Industrial Development Agency, 2009). On the northern coast of the County much of the shoreline is wooded and some of it is sand beach, whereas on the southern shore, the majority is sand beach or wetlands, and some of which is industrial. The County has 8 public beaches, three harbors, 28 marinas and boatyards, and 13 yacht clubs (Nassau County, 2011). The Oyster Bay National Wildlife Refuge accounts for 3,000 acres of nationally-protected land. There are also several wildlife sanctuaries and state parks in the wetlands along the southern coast. The County also has one national park – the Sagamore Hill National Historical Site (New York City Department of Parks and Recreation, 2012; U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Popular destinations in Nassau County include: Museum Row, a stretch of several of Long Island's more popular museums, including children's museums, firefighter's museums, and aviation museums; Old Bethpage Village Restoration, a recreated 19th century village; and Americana Manhasset, a village featuring over 60 international boutiques. The wildlife areas, historic mansions, and the national historic sites are also major tourist attractions (Nassau County Industrial Development Agency, 2009).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 47,087 business establishments in Nassau County in 2010 (U.S. Bureau of Labor Statistics, 2010). The North Shore-Long Island Jewish Health System, the largest employer in the County, employed 28,283 in 2004; Catholic Health Services, the second largest employer, employed roughly 13,500 in the same year (Newsday, 2004).

7. Coastal Tourism/Recreation Activity

Nassau County has miles of sandy beach, including the 6.5-mile Jones Beach State Park. The Jones Beach State Park offers amenities such as basketball courts, deck games, and shops along its 2-mile boardwalk, and hosts events such as free summer concerts and social dancing (New York State Office of Parks, Recreation & Historic Preservation). The Long Beach Boardwalk, built in 1907, is said to be the “quintessential surf town” by the Nassau County Industrial Development Agency (Nassau County Industrial Development Agency, 2009). Whether public or private, the majority of the beaches in Nassau County are large, white sand stretches, near to the population of New York City, yet separate enough to create a more peaceful environment. Popular activities on the County’s southern beaches include surfing, swimming, sunbathing, and beachcombing.

According to the National Oceanic and Atmospheric Administration, 92.3 percent of all ocean-related jobs in Nassau are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 4,022 establishments dedicated to leisure and hospitality alone in Nassau County; the average weekly wage for employees of these establishments is \$439. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Nassau County increased by 10,284 jobs, or by approximately 22 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 74.2 percent of all ocean, recreation, and tourism establishments in Nassau County are small (U.S. Census Bureau, 2009).²

In 2009, 1,150 ocean-related establishments in the County employed 12,374 people. In 2000, there were 1,194 establishments in the sector, and 12,755 direct jobs in the sector. In the nine years between 2000 and 2009, the number of ocean-related establishments decreased by 3.7 percent and the number of ocean-related direct jobs decreased by 3.0 percent (National Ocean Economics Program, 2012).

There are 66 hotels, one bed and breakfast, and six campgrounds in Nassau County (U.S. Census Bureau, 2009). According to the U.S. Census, less than one percent of all houses in Nassau County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Employment for the amusement, gambling, and other recreation industry in Exhibit 5 roughly doubles in summer months, whereas other tourism industries see smaller, but significant, increases.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Nassau County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	15	59	34	100% [#]
Marinas (713930)	169	325	340	23.2%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	95	124	109	-55.3%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	0	0	0	0
Restaurant Employment (7221 & 7222)	30,663	34,044	32,571	8.8%
Amusement, Gambling, Other Recreation (713)	5,084	9,740	6,993	-1.1%
General Tourism				
Travel Agencies (561510)	490	493	496	-31.7%
Tour Operators (561520)	156	176	168	-1.8%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Scenic and Sightseeing Transportation, Water was listed as 0 in 2005.

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New York County, New York

1. Synopsis

New York County, New York is located on the island of Manhattan, which is the County's only municipality. Manhattan is the most densely populated County in the United States, and one of the most densely populated regions in the world. The City is a hub for global business, and in particular, for finance, and therefore its high-priced real estate is supported by an intellectually-based economy, rather than a manufacturing one. The County's population is 1,585,873 people (U.S. Census Bureau, 2010a).

Tourism and recreation represents nearly the entire economic base of the ocean economy in New York County. According to the National Oceanic and Atmospheric Administration, 98.3 percent of ocean-related jobs in the County are related to tourism and recreation (National Oceanic and Atmospheric Administration, 2012). 74.2 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 7,279 ocean-related establishments employed 152,252 people in the County (National Ocean Economics Program, 2012).

2. Location

New York County, shown in Exhibit 1, sits on an island between New Jersey and southern New York. The County has a total area of only 33.8 square miles, and is bordered on all four sides by rivers and bays (U.S. Census Bureau, 2010a). New York County is bordered by Hudson County, New Jersey to the west, Bronx, Queens, and Kings Counties to the east, Westchester County to the north, and the Upper Bay to the south.

Exhibit 1. Map of New York County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As the economic center of the east coast of the United States, New York County is accessible by all means of transportation. Major interstates, such as I-95, run through or just outside the City's limits and provide access in all directions (Google, Inc., 2012). Three of the larger airports on the east coast are in the surrounding counties, though none are actually within the County itself. Manhattan is known for its excellent subway system, and is also known for Penn Station and Grand Central Station – major train hubs that serve routes to the north, south, east and west. Ferries to and from Manhattan and New York's

Harbor Islands—especially in lower Manhattan near Wall Street—run daily commuter routes for the City’s employees that live in surrounding counties (American Public Transportation Association, 2012).

3. Demographics

New York County has a year-round population of 1,339,532 (U.S. Census Bureau, 2010a). The following three tables profile New York County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, New York County is a densely populated county with a great amount of wealth.

Exhibit 2. Population Profile

	New York County	New York State
Year-Round Population	1,585,873	19,378,102
Population Change (2000-2010)	3.2%	2.12%
Median Age (years)	36.4%	38.0
Percent Female	53.1%	51.6%
Percent Foreign Born	28.6%	21.7%
<i>Ethnic Profile</i>		
White	57.4%	65.7%
Black/African American	15.6%	15.9%
Asian	11.3%	7.3%
Hispanic/Latino	25.4%	17.6%
American Indian	0.5%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	New York County	New York State
Unemployment Rate	9.2%	9.9%
Percent Out of Labor Force	32.9%	36.5%
Median Household Income	\$63,832	\$54,148
Percent of Population Below Poverty Line	22.1%	14.9%
<i>Educational Attainment</i>		
High School Diploma	13.1%	27.7%
Bachelor’s Degree	30.4%	18.6%
Graduate/Professional Degree	27.7%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	New York County	New York State
Population Density (people/sq. mile)	69,467.5	411.2
Housing Density (structures/sq. mile)	37,104.2	172.1
Housing Structures that Are Independent Units	1.5%	49.4%
Occupied Units	90.2%	88.8%
Properties for Seasonal, Rec. or Occasional Use	3.3%	3.6%
Median House Value	\$825,200	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original Native population of New York County was members of the Lenape Indian Tribe – a seasonal-migratory group who had a successful fishing village in Manhattan. The French explorers were the first Europeans to arrive in the territory in 1524, it was the Dutch who first settled the land in 1624 when they created a Dutch fur trading colony. The Dutch then purchased the land that is now considered Manhattan from the Lenape people, and named the area New Amsterdam. When the British conquered the region, they renamed the area New York (New York Journey, 2011).

The 19th and 20th centuries were a time of great growth for New York. The entrance to the United States at Ellis Island led many immigrants to make their home in New York, thus the City witnessed an influx of a low-cost labor force, ready to build a next-generation city. The 1883 opening of the Brooklyn Bridge and the opening of the New York City Subway in 1904 created a more cohesive and accessible city. Following the construction of several skyscrapers, New York City became the most populous city in the world in 1925 (Manhattan, 2012; New York Journey, 2011).

Festivals in the County are often ethnically or culturally-based—including Harlemfest, a tradition of the rich musical and cultural roots of that community—a result of the strong immigrant populations that exist in various parts of the area. Smaller river- or bay-side festivals exist, though none that attract the level of publicity that some of Manhattan’s other annual traditions receive, namely the ringing in of the New Year with the ball drop in Times Square.

5. Coastal Amenities

New York County’s coastline is along the Hudson River and the East River. Within the County there is only one harbor, three marines and boatyards, and one yacht club. The County has zero public beaches and zero wildlife refuges (New York City Department of Parks and Recreation, 2012; U.S. Fish and Wildlife Service, 2012). There are, however, several national parks in the County. They include: National Parks of New York Harbor; St. Paul’s Church National Historic Site; Federal Hall National Memorial; General Grant National Memorial; Governors Island National Monument; Hamilton Grange National Memorial; and the Theodore Roosevelt Birthplace (U.S. National Park Service, 2012).

The two most popular historic destinations in the waters surrounding Manhattan include Liberty Island—the home of the Statue of Liberty—and Ellis Island – home of the Ellis Island Immigration Museum. The streets and neighborhoods of Manhattan are full of additional cultural and historical artifacts, museum, and monuments, including the skyscrapers, such as the Empire State Building, built during the roaring twenties. The recently-built National September 11 Memorial and Museum has been a popular destination for visitors from throughout the country.

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 103,528 business establishments in New York County in 2010 (U.S. Bureau of Labor Statistics, 2010a). New York County, as well as the surrounding area, has a significant wealth divide; executive officers at some of the world’s largest and wealthiest firms work in New York City, whereas over 22% of the population is below the poverty line (Exhibit 3) (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

The coastline surrounding New York County is used almost entirely for industrial and transportation purposes. There are no beaches in the County, but the Port Authority of New York and New Jersey has several cargo docks, ferry terminals, and other industrial facilities. Consequently, tourism to New York

County is not geared around coastal amenities, except for the museums and historical landmarks in the Upper Bay.

According to the National Oceanic and Atmospheric Administration, 98.3 percent of all ocean-related jobs in New York are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 13,089 establishments dedicated to leisure and hospitality alone in New York County; the average weekly wage for employees of these establishments is \$788. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in New York County increased by 8,522 jobs, or by only 4 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 77.8 percent of all ocean recreation and tourism establishments in New York County are small (U.S. Census Bureau, 2009).¹

In 2009, 7,279 ocean-related establishments in Manhattan employed a total of 152,252 people. Between 2000 and 2009, the ocean industry had grown since 2000 at a rather fast pace. In 2000, there were 6,285 establishments in the sector, and 116,904 direct jobs at those establishments. Therefore, between 2000 and 2009, the number of establishments grew by 15.8 percent and the number of people employed by those establishments grew nearly twice as fast, or by 30.2 percent (National Ocean Economics Program, 2012).

There are 345 hotels, 19 bed and breakfast, and six campgrounds in New York County (U.S. Census Bureau, 2009). According to the U.S. Census, an additional 3.3 percent of all houses in New York County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry, which employs over 117,000 per year people on average (U.S. Bureau of Labor Statistics, 2010). Exhibit 5 further shows the relative stability of employment levels year-round in New York County.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. New York County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	675	0	-100% [#]
Marinas (713930)	0	30	23	100% [^]
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	35	50	40	-11.1%
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	35,700	36,978	37,255	8.1%
Restaurant Employment (7221 & 7222)	111,108	118,656	117,927	23.2%
Amusement, Gambling, Other Recreation (713)	15,290	15,749	15,622	14.7%
General Tourism				
Travel Agencies (561510)	3,625	3,720	3,705	-11.9%
Tour Operators (561520)	931	1,080	998	-11.6%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	395	0	519	26.3%

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Scenic and Sightseeing Transportation, Water was listed as 763 in 2005.

[^] BLS figure for Marinas was listed as 0 in 2005.

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Queens County, New York

1. Synopsis

Queens County, New York sits on Long Island, along the northern half of the East River, and at the most inner shores of the Long Island Sound. Queens is comprised of only one borough – Queens – and is one of five New York City boroughs, along with Manhattan (New York County), Brooklyn (Kings County), The Bronx (Bronx County), and Staten Island (Richmond County). As with each of the other four boroughs, Queens County is densely populated. The County’s population is 2,230,722 people. The County is the largest by land area and the second largest by population in New York City (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, roughly 72.4 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). 79.4 percent of all ocean recreation and tourism establishments in Queens County are small (U.S. Census Bureau, 2009).¹ In 2009, 964 establishments in Queens’ ocean economy employed a total of 8,570 people (National Ocean Economics Program, 2012).

2. Location

Queens County, shown in Exhibit 1, is on Long Island, west of the East River and the borough of Manhattan. The County has a total area of 178.3 square miles (U.S. Census Bureau, 2010a). Queens County is bordered by Kings County to the south, New York County to the west, Bronx County to the north, and Nassau County to the east.

Exhibit 1. Map of Queens County



Source: ESRI, 2011 and OpenStreetMap, 2011.

With its proximity to Manhattan, Queens is very accessible to points north, west, south, and east. Four interstate highways run through the County, all of which cross the East River to either Manhattan or the Bronx. There are three other bridges in the County, though two access islands within the East River only (Google, Inc., 2012). Rail within Queens County includes both the Long Island Railroad and the New York

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

City Subway system, and an Amtrak Station is in nearby Manhattan. LaGuardia Airport and John F. Kennedy International Airport are both located in Queens County, and Newark Liberty International Airport is just across the border in New Jersey. There are no ferries with landings in Queens County (American Public Transportation Association, 2012).

3. Demographics

Queens County has a year-round population of 2,230,722 (U.S. Census Bureau, 2010a). The following three tables profile Queens County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Queens County is statistically the most diverse county in the United States.

Exhibit 2. Population Profile

	Queens	New York
Year-Round Population	2,230,722	19,378,102
Population Change (2000-2010)	0.06%	2.12%
Median Age (years)	37.2	38.0
Percent Female	51.6%	51.6%
Percent Foreign Born	48.1%	21.7%
<i>Ethnic Profile</i>		
White	39.7%	65.7%
Black/African American	19.1%	15.9%
Asian	22.9%	7.3%
Hispanic/Latino	27.5%	17.6%
American Indian	0.7%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Queens	New York
Unemployment Rate	11.1%	9.9%
Percent Out of Labor Force	35.5%	36.5%
Median Household Income	\$53,054	\$54,148
Percent of Population Below Poverty Line	15.0%	14.9%
<i>Educational Attainment</i>		
High School Diploma	27.5%	27.7%
Bachelor's Degree	19.3%	18.6%
Graduate/Professional Degree	10.1%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Queens	New York
Population Density (people/sq. mile)	20,553.6	411.2
Housing Density (structures/sq. mile)	7,694.9	172.1
Housing Structures that Are Independent Units	18.6%	49.4%
Occupied Units	93.4%	88.8%
Properties for Seasonal, Rec. or Occasional Use	0.7%	3.6%
Median House Value	\$479,300	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original Native population of Nassau County was Lenape peoples of the Algonquin Tribe, and lived in the area for over 9,000 years before the arrival of the Europeans in the first half of the 17th century. The Tribe was well-adapted to the area, as fishers, farmers, and hunters of the plentiful deer population on the island. Diseases from the Europeans, land sales, and northward migration reduced the size of the tribe significantly. Today, descendents of the original tribe still live in neighboring Suffolk County (Queens Borough President, 2011).

The Dutch were the first Europeans to settle the area in the 1635. In the mid-17th century, the British took control of the area from the Dutch, however. The growth of Manhattan led to the growth of Queens; better access to the downtown area via new bridges and the New York City subway system allowed employees of firms located in Manhattan to live in Queens (Queens Borough President, 2011).

Flushing Meadows Corona Park is a common location for Queens' major annual events and festivals. From bike rides, to galas, to heritage festivals centered on dancing, music and food, the park hosts every type of activity. Because of the diversity of the community, many of the events in the park are ethnically-focused or culturally-focused, and organized by one of the County's many ethnic groups. Each year the park is also the host of the U.S. Open at the Billie Jean King National Tennis Center, a tennis tournament that is part of the professional circuit.

5. Coastal Amenities

The majority of Queens' coastline is industrial, though there are areas of wildlife havens and sand beaches along the southern shore. The County has one public beach – Rockaway Park – two Harbors, five marinas, and nine yacht clubs (New York City Department of Parks and Recreation, 2012). The Jamaica Bay Wildlife Refuge, part of the Gateway National Recreation Area, is the only wildlife refuge in the national park system, and contains 9,155 acres of salt marsh, upland field and woods, several fresh and brackish water ponds, and an open bay (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Far from Rockaway Park and the Jamaica Bay Wildlife Refuge, Fort Totten Park is a popular visitor destination. The Park houses a Civil War fortress amongst a relaxing, natural grassy field backdrop. The Park has a swimming pool, allows sunbathing on its lawns, and rents canoes for excursions along Long Island Sound. The park is also a favorite location for wildlife enthusiasts due to the high number of migrating waterfowl before their journey south for the winter (New York City Department of Parks and Recreation, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 42,420 business establishments in Queens County in 2010. Queens County's economy in 2010 roughly mirrored that of the state of New York's, though with slightly higher unemployment (U.S. Bureau of Labor Statistics, 2010).

7. Coastal Tourism/Recreation Activity

Whereas Queens County's northern coastline is entirely industrial, the southern coastline – the peninsula out to Rockaway and Breezy Points - has miles of public sandy beaches, lined by residential neighborhoods. The Rockaway Beach & Boardwalk is more than 170 acres of sand beach, and contains the City's only surfing areas (New York City Department of Parks and Recreation, 2012). Though this is the only public beach, a few sandy areas do exist on private property along the southern coast. Non-beach coastal activities in Queens include visiting parks and wildlife habitats, canoeing or kayaking

within Long Island Sound or in the bays of the Jamaica Bay Wildlife Refuge, and boating through the East River, in Long Island Sound, or in the open Atlantic Ocean.

According to the National Oceanic and Atmospheric Administration, 72.4 percent of all ocean-related jobs in Queens are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 4,518 establishments dedicated to leisure and hospitality alone in Queens County; the average weekly wage for employees of these establishments is \$449. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Queens County increased by 4,624 jobs, or by just 13 percent (U.S. Bureau of Labor Statistics, 2012). U.S. Census data states that 79.4 percent of all ocean, recreation, and tourism establishments in Queens County are small (U.S. Census Bureau, 2009).²

In 2009, 964 establishments in the ocean economy in Queens County employed 8,570 people. In 2000, there were 1,540 ocean-related establishments and 13,111 direct ocean-related jobs in the County. In the nine years between 2000 and 2009, the number of ocean-related establishments in the County decreased by 37.4 percent, and the number of people employed by those establishments decreased by 34.6 percent (National Ocean Economics Program, 2012).

There are 88 hotels, four bed and breakfasts, and six campgrounds in Queens County (U.S. Census Bureau, 2009). According to the U.S. Census, less than one percent of all houses in Queens County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Whereas employment in the restaurant industry does not drastically increase between winter and summer, employment in the amusement, gambling, and other recreation industry increases by almost 60 percent.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Queens County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	0	0	5	-16.7%
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	0	0	0	0
Renting Pleasure Boats (532292)	-	-	0	-
Land-Based				
Hotel Employment (72111)	0	0	0	0
Restaurant Employment (7221 & 7222)	24,703	26,176	25,890	19.7%
Amusement, Gambling, Other Recreation (713)	1,549	2,445	1,858	4.7%
General Tourism				
Travel Agencies (561510)	693	821	765	6.7%
Tour Operators (561520)	158	181	175	10.1%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-100% [#]

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Tour Bus, Scenic and Sightseeing, Operation was listed as 61 in 2005.

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<http://quickfacts.census.gov/qfd/states/25/25001.html>. Accessed March 2012.

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Suffolk County, New York

1. Synopsis

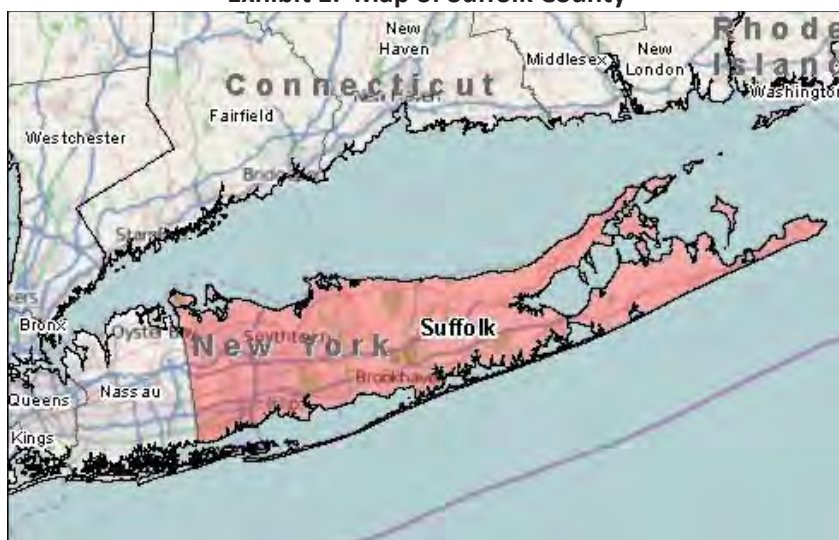
Suffolk County, New York is the outermost county on Long Island. It spans the length of the Connecticut coastline. Its northern shore sits inside the Long Island Sound, and its southern shore faces the open Atlantic Ocean. The County is slightly more densely populated than the average county along the eastern seaboard, but much more sparsely populated than the nearby boroughs of New York City, and become progressively less populated as one continues east. Suffolk County's coastline is predominantly white sand beach. The County has only 10 towns, with Brookhaven being the largest by area. The County's population is 1,493,350 people (U.S. Census Bureau, 2010a). The Fire Island National Seashore and the town of Southampton are two less-developed locations within the County that attract summer travelers.

According to the National Oceanic and Atmospheric Administration, an estimated 81.8 percent of all ocean-related jobs in Suffolk County are related to tourism and recreation (National Oceanic and Atmospheric Administration, 2012). 75.2 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 2,021 ocean-related establishments in the County's economy employed 23,825 people (National Ocean Economics Program, 2012).

2. Location

Suffolk County, shown in Exhibit 1, is on Long Island, directly west of New York City. The County has a total area of 2,373 square miles, and each of its 10 municipalities lies along the Long Island Sound, the County's eastern-most bays, or the Atlantic Ocean; Brookhaven has coastline along the Sound as well as the Atlantic Ocean (U.S. Census Bureau, 2010a). Suffolk County is bordered by Nassau County to the west, the Long Island Sound and the adjacent state of Connecticut to the north, and the Atlantic Ocean to the south.

Exhibit 1. Map of Suffolk County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Suffolk County is less accessible than the counties on Long Island to the west. Interstate-495 and N.Y. Route 27 span the entire length of Long Island from east to west, including Suffolk County, and provide a direct route to New York City (Google, Inc., 2012). A ferry is the best option for reaching the County

from the north, as landings in Bridgeport and New London, Connecticut provide service to Port Jefferson and Orient Point, respectively. There is also a ferry to Block Island, Rhode Island from Montauk, as well as the Bay Shore-Fire Island Ferry. No major airports are in Suffolk County, although the John F. Kennedy and LaGuardia Airports are nearby. The Long Island Railroad has nearly 100 stops throughout Long Island, and connects to Penn Station in Manhattan (American Public Transportation Association, 2012; Metropolitan Transportation Authority, 2012).

3. Demographics

Suffolk County has a year-round population of 1,493,350 (U.S. Census Bureau, 2010a). The following three tables profile Suffolk County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Suffolk County has a wealthier population compared to the rest of the state and has grown more than twice as fast as the statewide average over the last decade.

Exhibit 2. Population Profile

	Suffolk	New York
Year-Round Population	1,493,350	19,378,102
Population Change (2000-2010)	5.21%	2.12%
Median Age (years)	39.8	38.0
Percent Female	50.8%	51.6%
Percent Foreign Born	14.0%	21.7%
<i>Ethnic Profile</i>		
White	80.8%	65.7%
Black/African American	7.4%	15.9%
Asian	3.4%	7.3%
Hispanic/Latino	16.5%	17.6%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Suffolk	New York
Unemployment Rate	8.4%	9.9%
Percent Out of Labor Force	33.5%	36.5%
Median Household Income	\$81,551	\$54,148
Percent of Population Below Poverty Line	6.2%	14.9%
<i>Educational Attainment</i>		
High School Diploma	30.7%	27.7%
Bachelor’s Degree	17.8%	18.6%
Graduate/Professional Degree	14.5%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Suffolk	New York
Population Density (people/sq. mile)	1,637.4	411.2
Housing Density (structures/sq. mile)	624.9	172.1
Housing Structures that Are Independent Units	85.7%	49.4%
Occupied Units	87.7%	88.8%
Properties for Seasonal, Rec. or Occasional Use	8.2%	3.6%
Median House Value	\$424,200	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original population of Suffolk County was members of the Algonquin Tribe, and existed for over 9,000 years before the arrival of the Europeans in the 1640's. The Tribe was well-adapted to the area, becoming fishers, farmers, and hunters of the plentiful deer population on the island. Diseases from the Europeans, land sales, and northward migration reduced the size of the tribe significantly. Today, descendents of the original tribe still exist on reservations in Mastic and Southampton, both in Suffolk County (Long Island Convention & Visitors Bureau and Sports Commission, 2012).

The Dutch were the first Europeans to settle the area in the early 1620's, but in the mid-17th century, the British took control of the area from the Dutch. The growth of surrounding counties, namely the five New York City boroughs, forced growth upon Nassau County and subsequently Suffolk County. In the second half of the 20th century, Suffolk County's population rose as a result of a train system that allowed residents to reach the New York City boroughs for work. Around this same time, and for the similar reason of improved accessibility, tourism to the area's remote beaches increased. Today, many residents of the New York City boroughs have summer or vacation houses in eastern Long Island, or "the Hamptons" (Long Island Convention & Visitors Bureau and Sports Commission, 2012).

The Seafood Festival and Craft Fair at the Long Island Maritime Museum will celebrate its 21st annual even in August of 2012. The two day event features indoor and outdoor exhibits, and is intended the celebrate Long Island's rich maritime history (The Seafood Festival, 2012). In 2011, the festival hosted over 18,000 visitors. Other festivals in the County are much smaller, but many similarly celebrate the importance of the marine environment to the region.

5. Coastal Amenities

Suffolk has 980 miles of shoreline on its southern, western, and northern coast (Bicoy, 2010). The County has approximately 60 public beaches, nearly 20 harbors, 72 marinas and boatyards, and 38 yacht clubs (Long Island Convention & Visitors Bureau and Sports Commission, 2012). There are seven national parks and wildlife refuges that account for nearly 23,000 acres of protected land. They include (with the acres of protected land): Amagansett National Wildlife Refuge (36); Conscience Point National Park (60); Wertheim National Wildlife Refuge (2697); Seatuck National Wildlife Refuge (196); Target Rock National Wildlife Refuge (80); Elizabeth A Morton National Wildlife Refuge (187); and the Fire Island National Seashore (19,579) (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

The Montauk Point Lighthouse is a popular tourist attraction, as it was authorized by the Second Congress under President George Washington, and built in 1796. The Vanderbilt Museum offers a combination of mansion, marine and natural history museum, planetarium and park, and promotes the education and enjoyment of Long Island visitors and residents. The two historic districts – Yaphank and

Blydenburgh Farm and New Mill – are also popular destinations (Long Island Convention & Visitors Bureau and Sports Commission, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 47,573 business establishments in Suffolk County in 2010 (U.S. Bureau of Labor Statistics, 2010). The Suffolk County Government is the largest employer in the County, employing over 10,000 people (Suffolk County Government, 2012). Many of the residents in the western part of the County commute to New York City daily for work, thus the Suffolk County economy is largely dependent on that of New York City's.

7. Coastal Tourism/Recreation Activity

Suffolk County has 980 miles of coastline of which the majority is white sand beach (Bicoy, 2010). Suffolk County beaches provide ideal environments for sunbathing, swimming, and beachcombing. The northern beaches are protected by the Long Island Sound and thus have calmer waters. The southern beaches are predominantly barrier beaches, which means they are far more secluded, and also have waters more suitable for sportsmen and surfers due to the open ocean.

Suffolk County has two areas that are particular interest to tourists, both of which offer undeveloped sandy beaches along the coast. The Fire Island National Seashore has high dunes, forestland, and abundant wildlife, and therefore attracts beachgoers ranging from surfers to nature enthusiasts. Visitors to the area enjoy the wildlife, the natural, scenic views, or simply the ability to relax on a secluded beach (U.S. National Park Service, 2012). Southampton, a town along the southern “fork,” or the southern shore of the eastern tip of Long Island – and part of “The Hamptons” – is a summer resort for some of the most affluent northeast families, many of whom have seasonal houses on the area. As with much of the southern shore of Long Island, the beaches in Southampton are continuous stretches of white sand. The shops and attractions in Southampton cater to a wealthier crowd, including two of America's 10 best golf courses, as rated by Golf Digest magazine (Conde Nast, 2011).

According to the National Oceanic and Atmospheric Administration, 81.8 percent of all ocean-related jobs in Suffolk are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 4,115 establishments dedicated to leisure and hospitality alone in Suffolk County; the average weekly wage for employees of these establishments is \$399. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Suffolk County increased by 15,333 jobs, or by approximately 37 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 75.2 percent of all ocean, recreation, and tourism establishments in Suffolk County are small (U.S. Census Bureau, 2009).¹

In 2009, 2,021 establishments in the County's ocean economy directly employed 23,825 people. In 2000, 2,082 establishments employed 22,745 people. Although the number of establishments decreased by 2.9 percent from 2000 to 2009, the number of people employed in the sector increased by 4.8 percent (National Ocean Economics Program, 2012).

There are 131 hotels, 17 bed and breakfast, and eight campgrounds in Suffolk County (U.S. Census Bureau, 2009). According to the U.S. Census, an additional 8.2 percent of all houses in Suffolk County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Employment for the amusement, gambling, and other recreation industry as well as the marinas industry increases more than twofold between summer and winter, whereas other tourism industries see smaller, but still significant, increases.

Exhibit 5. Suffolk County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	16	100	0	0
Marinas (713930)	666	1,263	888	0.0%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	392	572	497	-19.4%
Renting Pleasure Boats (532292)	6	41	18	5.9%
Land-Based				
Hotel Employment (72111)	2,085	3,070	2,531	-13.0%
Restaurant Employment (7221 & 7222)	27,794	34,001	30,631	13.3%
Amusement, Gambling, Other Recreation (713)	5,329	12,534	8,018	6.7%
General Tourism				
Travel Agencies (561510)	413	427	422	-23.3%
Tour Operators (561520)	308	326	324	32.2%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	2	3	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

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Westchester County, New York

1. Synopsis

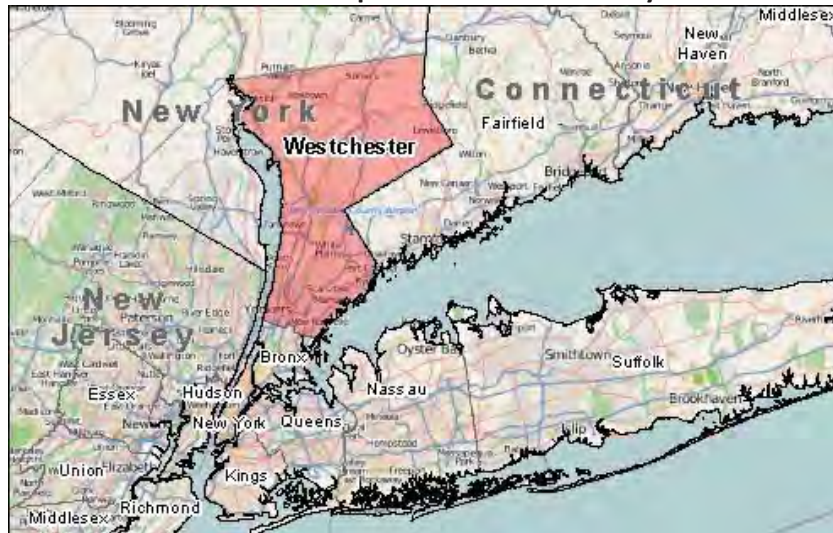
Westchester County, New York is just north of the five boroughs of New York City, and has an extensive border with the state of Connecticut. Westchester County's coastline is small compared the land area of the state, as only a small portion on the inner shores of the Long Island Sound have ocean shoreline. There are nearly 70 communities in the County, but only six are coastal; 13 more line the Hudson River, however. Westchester County is densely populated, although far less so than the counties to the south. The County's population is 949,113 people (U.S. Census Bureau, 2010a).

According to the National Oceanic and Atmospheric Administration, 83.4 percent of all ocean-related establishments are related to tourism (National Oceanic and Atmospheric Administration, 2012). 75.6 percent of all ocean recreation and tourism-related establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 364 establishments in the ocean economy directly employed 3,447 people (National Ocean Economics Program, 2012).

2. Location

Westchester County, shown in Exhibit 1, is one of the inner-most counties on Long Island Sound, and one of the most southern on the Hudson River. The County has a total area of 500 square miles (U.S. Census Bureau, 2010a). Westchester County is bordered by Putnam County to the north, Rockland County adjacent to the Hudson River to the west, the five boroughs (and counties) of New York City to the south, and Fairfield County, Connecticut and Long Island Sound to the east.

Exhibit 1. Map of Westchester County



Source: ESRI, 2011 and OpenStreetMap, 2011.

With its proximity to Manhattan, Westchester is easily accessible to points north, west, south, and east. Three interstate highways run through the County, and the Tappan Zee Bridge between Tarrytown, in Westchester County, and Nyack, in Rockland County (Google, Inc., 2012). The New York City Subway does not reach Westchester County but the Metro North Rail Commuter Line has three different routes,

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

connecting each area of the County to Grand Central Terminal in New York City to the south, points north in New York State, and points east in Connecticut (American Public Transportation Association, 2012). Amtrak also has two lines through Westchester County, from New York City (and points south) to northern New York State and eastern New England (Amtrak, Inc, 2012). The one ferry in the County crosses the Hudson River between Ossining and Haverstraw, and then connects to the Metro North Rail en route to Grand Central Terminal. There are no major airports in Westchester County, however, the three major New York City metropolitan area airports are reachable by public transportation (American Public Transportation Association, 2012).

3. Demographics

Westchester County has a year-round population of 949,113 (U.S. Census Bureau, 2010a). The following three tables profile Westchester County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Westchester County's population, economic, and housing profiles largely mirror that of the state, though the County is slightly more educated, wealthy, and more densely populated.

Exhibit 2. Population Profile

	Westchester	New York
Year-Round Population	949,113	19,378,102
Population Change (2000-2010)	2.78%	2.12%
Median Age (years)	40.0	38.0
Percent Female	51.9%	51.6%
Percent Foreign Born	24.3%	21.7%
<i>Ethnic Profile</i>		
White	68.1%	65.7%
Black/African American	14.6%	15.9%
Asian	5.4%	7.3%
Hispanic/Latino	21.8%	17.6%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Westchester	New York
Unemployment Rate	8.6%	9.9%
Percent Out of Labor Force	33.5%	36.5%
Median Household Income	\$77,415	\$54,148
Percent of Population Below Poverty Line	8.8%	14.9%
<i>Educational Attainment</i>		
High School Diploma	22.4%	27.7%
Bachelor's Degree	23.4%	18.6%
Graduate/Professional Degree	21.1%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Westchester	New York
Population Density (people/sq. mile)	2,204.7	411.2
Housing Density (structures/sq. mile)	861.4	172.1
Housing Structures that Are Independent Units	50.6%	49.4%
Occupied Units	93.6%	88.8%
Properties for Seasonal, Rec. or Occasional Use	0.9%	3.6%
Median House Value	\$556,900	\$309,900

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The original population of Westchester County was the Lenape peoples of the Algonquin Tribe, who resided in the area for over 9,000 years before the arrival of the Europeans in the first half of the 17th century. The Tribe was well-adapted to the area, becoming fishers, farmers, and hunters of the plentiful deer population on the island. Diseases, land sales, and northward migration reduced the size of the tribe significantly. Today, descendants of the original tribe still exist in nearby Suffolk County (Westchester County, 2010).

The Dutch were the first Europeans to settle the area in the 1620's and 1630's. English settlers arrived in the 1640's, and by 1664, the British gained control of the area from the Dutch. In the 18th century, residents of Westchester County supplemented their incomes through home-based "cottage industries," which led to more road use, and eventually, more road improvements. This led to the growth of taverns and other roadside restaurants and ferries, and eventually, encouraged more travel. By 1775, Westchester County was the wealthiest in the colony of New York (Westchester County, 2010).

Many festivals in Westchester County celebrate the Hudson River for both its beautiful scenery and important transportation means, including popular music and environmental festival Clearwater's Great Hudson River Revival, in June (Clearwater's Great Hudson River Revival, 2012).

5. Coastal Amenities

Westchester County's coastline lies along the inner-most section of Long Island Sound. The majority of this coastline is rocky and wooded bay-protected areas, though some smaller sandy beach areas exist. Similarly, the overwhelming majority of the shoreline is privatized; as there are only three public beaches within the County. There are five harbors, 16 marinas and boatyards, and 16 yacht clubs (Hudson Valley Web TV, 2012). There are no national wildlife refuges or national parks, and therefore no nationally-protected lands in the County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Westchester County was an important region during the American Revolutionary War, and thus has several remaining landmarks from the time period to this day. The majority of these are in the White Plains region, including Battle Park and Chatterton Hill, Washington's Headquarters Museum, and Patriots Park – which mark the location of historic battles and important houses of major U.S. generals. The wealth and prominence of Westchester County throughout the 18th and 19th centuries led to the construction of several castles, including the "Castle on the Hudson," Glenview Mansion, and the Rockefeller Estate; today, several of these are scenic attractions overlooking the Hudson River or Long Island Sound (Westchester County, 2011).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 31,590 business establishments in Westchester County in 2010 (U.S. Bureau of Labor Statistics, 2010). IBM Corporation, a multi-technology manufacturing firm, is the County's largest employer, and employs approximately 7,475 people; the County of Westchester employed 5,881 people in 2010 (LoHud, 2006).

7. Coastal Tourism/Recreation Activity

The three public beaches in Westchester County are sheltered by the shallow waters and rocky bays (Hudson Valley Web TV, 2012). Pelham Bay Park is three times the size of Manhattan's Central Park, and is the largest in the County. The park features two golf courses, the Bartow-Pell Mansion, snack bars, miles of trails through wooded forest, tennis and basketball courts, and a thirteen-mile shoreline along Long Island Sound, which includes the park's beach (New York City Department of Parks and Recreation, 2012). Rye Playland Park is an amusement park located beachside, similar to a boardwalk amusement park, although the park is partitioned off from the beach, and fees are paid at the park entrance, not at individual rides. There are separate fees for beach access and for access to the amusement park (Westchester County Parks Department, 2012). Glen Island Park, on a 105-acre island connected by a drawbridge, has a crescent-shaped beach on the park's southeastern shoreline. The park also has picnic pavilions, boat launches, and cannons, sculptures, and castles crafted during the 19th century (Westchester County, 2012). The calm, protected waters off Westchester County, however, are most suitable to boating, kayaking, and sailing, which has resulted in a high number of marinas and yacht clubs.

According to the National Oceanic and Atmospheric Administration, 83.4 percent of all ocean-related jobs in Westchester are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 2,920 establishments dedicated to leisure and hospitality alone in Westchester County; the average weekly wage for employees of these establishments is \$494. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Westchester County increased by 8,499 jobs, or by just short of 30 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 75.6 percent of all ocean, recreation, and tourism establishments in Westchester County are small (U.S. Census Bureau, 2009).²

In 2009, 364 ocean-related establishments in Westchester County directly employed 3,447 people. In 2000, there were 777 such establishments and 7,900 jobs. In the nine years between 2000 and 2009, Westchester County lost approximately 53.2 percent of its ocean-related establishments and 56.4 percent of its ocean-related jobs (National Ocean Economics Program, 2012).

There are 44 hotels, one bed and breakfast, and 12 campgrounds in Westchester County (U.S. Census Bureau, 2009). According to the U.S. Census, less than one percent of all houses in Westchester County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the county as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Whereas employment in the restaurant industry does not drastically increase between winter and summer, employment in the amusement, gambling, and other recreation industry more than doubles, indicating the that latter may

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

serve seasonal tourists, while the former is supported by the local population. Data for hotel employment in 2005 showed similar results to those of the restaurant industry.

Exhibit 5. Westchester County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	8	15	12	100% [#]
Marinas (713930)	181	494	272	27.1%
Boat Building and Repair (336612)	-	-	-	-
Boat Dealers (441222)	0	0	0	-100% [^]
Renting Pleasure Boats (532292)	0	0	3	-50.0%
Land-Based				
Hotel Employment (72111)	0	0	0	-100% [@]
Restaurant Employment (7221 & 7222)	17,071	18,286	17,901	14.5%
Amusement, Gambling, Other Recreation (713)	5,421	11,597	7,796	17.6%
General Tourism				
Travel Agencies (561510)	212	206	209	-35.3%
Tour Operators (561520)	48	50	47	-14.5%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Bureau of Labor Statistics figure for Tour Bus, Scenic and Sightseeing, Operation was listed as 0 in 2005.

[^] Bureau of Labor Statistics figure for Boat Dealers was listed as 65 in 2005.

[@] Bureau of Labor Statistics figure for Hotel Employment was listed as 2,606 in 2005.

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Brunswick County, North Carolina

1. Synopsis

Brunswick County is located in the southeasternmost corner of North Carolina. The County is known for its seafood, maritime history, and golf courses. It is located between Wilmington, North Carolina and Myrtle Beach, South Carolina (Intracoastal Realty Corporation, 2012). Over 107,000 people reside in Brunswick County; the County has a population density of 127 people per square mile and a housing density of 91 units per square mile (U.S. Census Bureau, 2010). Brunswick County ranks as one of the fastest growing counties in the United States (Intracoastal Realty Corporation, 2012).

Tourism represents a significant portion of the ocean economy in Brunswick County. In 2009, 215 ocean-related establishments directly employed 2,629 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 82.4 percent of the ocean-related jobs in Brunswick County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the 215 ocean recreation and tourism-related businesses in Brunswick County, 66.3 percent of are small (U.S. Census Bureau, 2009).¹

2. Location

Brunswick County is located in the southeasternmost corner of North Carolina. It lies about 150 miles from Raleigh, North Carolina and Charleston, South Carolina. Adjacent counties include Pender County (to the northeast), New Hanover County (to the east), and Columbus County (to the northwest) in North Carolina and Horry County, South Carolina (to the southwest) (Google, Inc., 2012). The County has 845 square miles of land and 45 miles of shoreline along the Atlantic Ocean (Intracoastal Realty Corporation, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Brunswick County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Brunswick County is primarily accessible by car. Several U.S. Highways cross Brunswick, including Routes 17, 74, and 76. Numerous North Carolina State Routes also pass through various portions of the County; they include Routes 87, 130, 133, 179, 211, and 904 (Google, Inc., 2012). Plane infrastructure also exists: Brunswick County Airport has two airports, the Brunswick County Airport and Ocean Isle Airport. Larger airports are also proximate, with the Wilmington International Airport 37 miles away and the Myrtle Beach International Airport 40 miles away (Brunswick County Tourism Development Authority, 2010).

3. Demographics

Brunswick County has a year-round population of 107,431 (U.S. Census Bureau, 2010). The following three tables profile Brunswick County’s population. As Exhibit 2 shows, the population of Brunswick County has grown significantly over the past decade (46.9 percent), greatly exceeding the population growth of the State (18.5 percent).

Exhibit 2. Population Profile

	Brunswick	North Carolina
Year-Round Population	107,431	8,049,313
Population Change (2000-2010) (%)	46.9%	18.5%
Median Age (Years)	47.4	37.4
Percent Female (%)	51.0%	7.4%
Percent Foreign Born (%)	3.9%	51.3%
<i>Ethnic Profile</i>		
White (%)	83.0%	68.5%
Black/African American (%)	11.4%	21.5%
Asian (%)	0.5%	2.2%
Hispanic/Latino (%)	5.2%	8.4%
American Indian (%)	0.7%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Brunswick	North Carolina
Unemployment Rate (%)	9.6%	8.8%
Percent Out of Labor Force (%)	42.4%	35.1%
Median Household Income (\$)	\$45,806	\$45,570
Percent of Pop. Below Poverty Line (%)	13.5%	15.5%
<i>Educational Attainment</i>		
High School Diploma (%)	30.9%	27.5%
Bachelor's Degree (%)	15.9%	17.6%
Graduate/Professional Degree (%)	7.6%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Brunswick	North Carolina
Population Density (people/sq. mile)	126.8	196.1
Housing Density (structures/sq. mile)	91.5	87.0
Housing Structures that are Independent Units (%)	61.6%	65.1%
Occupied Units (%)	59.8%	86.5%
Properties for Seasonal, Rec. or Occasional Use (%)	30.9%	4.4%
Median House Value (\$)	\$190,500	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Before settlement by Europeans, the area of present-day Brunswick County was inhabited by the Cape Fear Indian tribe, relatives of the Waccamaw and Choctaw tribes.

The County of Brunswick was founded in 1764 when portions of Bladen County and New Hanover County were combined. It was named after the port of Brunswick Town, whose name honored England's King George I, Duke of Brunswick (Brunswick County, North Carolina, 2011).

Brunswick has a rich military history. It was the center of confrontations between British and American troops leading up to and during the American Revolution. In 1765, the Royal Navy seized ships in Brunswick County to force compliance with the Stamp Act. Brunswick's "Sons of Liberty" resisted. During the Revolution, the colonists tried to defend the port at Cape Fear but eventually had to retreat. During the Civil War, Cape Fear in Brunswick County witnessed blockades and battle that consumed the Southern coastline.

After the U.S. Army Corp of Engineers dredged the Intracoastal Waterway in the 1930s, North Carolina's barrier islands became popular sites for residential development.

The islands and numerous inlets of Brunswick County also harbored infamous pirates like Blackbeard and Stede Bonnet, the "Gentleman Pirate" (Brunswick County Chamber of Commerce, 2011).

Brunswick County hosts several events each year, including: the U.S. Open King Mackerel Tournament; the North Carolina Oyster Festival, which draws about 45,000 people each year; and the North Carolina 4th of July Festival in Southport, which attracts over 50,000 people (Brunswick County Tourism Development Authority, 2010).

5. Coastal Amenities

Brunswick County sports 45 miles of sandy coastline, much of which has been developed into residential communities (Intracoastal Realty Corporation, 2012). The County has 16 public beaches, eight marinas, and six yacht clubs (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). There are no national parks or wildlife refuges and no federally protected land (U.S. National Park Service, 2012). However, the Nature Conservancy preserves the Green Swamp (17,000 acres), one of the largest wetlands in the nation (Brunswick County Tourism Development Authority, 2010; The Nature Preservancy, 2012).

Historically significant coastal landmarks in Brunswick County include the Brunswick Town/Fort Anderson State Historic Site, where European settlements formed a successful community in 1726 and later defended it against an attack by Spanish privateers in 1748 (Brunswick County Tourism Development Authority, 2010).

6. General Economic Situation

The U.S. Census Bureau lists 2,321 business establishments in Brunswick County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Brunswick County Board of Education and the County Government, both with over 1000 employees (Brunswick County Economic Development Commission, 2012).

7. Coastal Tourism/Recreation Activity

Brunswick County offers a "down-home country charm and a laid-back coastal lifestyle," according to real estate guides. Brunswick's coast is dappled with barrier islands, described as "pristine and

uncrowded.” There are a variety of ways to enjoy the outdoors in Brunswick. Tourists can parasail, swim, stroll the beach, watch dolphins, fish from the piers or from charter boats, visit the lighthouses, take guided tours of the islands, or golf on one of Brunswick’s 17 championship courses, which earn the County the title “North Carolina’s Golf Coast.” There are also indoor activities that highlight the County’s maritime culture, such as visiting the Museum of Coastal Carolina and the North Carolina Maritime Museum at Southport.

Tourism brochures also note Brunswick’s distinctive cuisine. Calabash, in Brunswick, dubs itself the “Seafood Capital of the World,” famous for its seafood stew (Brunswick County Tourism Development Authority, 2010; Intracoastal Realty Corporation, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 82.4 percent of the ocean-related jobs in Brunswick County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$395.38 million in Brunswick County, generating \$73.63 million in payroll income and supporting 4,600 jobs (North Carolina Department of Commerce, 2010). There are 309 establishments dedicated to leisure and hospitality in Brunswick County; the average weekly wage for employees of these establishments is \$294. Leisure and hospitality employment in Brunswick County increased by 1,683 jobs, or 44.86 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 66.3 percent of ocean recreation and tourism-related businesses in Brunswick County are small (U.S. Census Bureau, 2009).²

In 2009, 215 ocean-related establishments directly employed 2,629 people in Brunswick County. This reflected an increase from 2000, when 188 establishments employed 1,954 people. From 2000 to 2009, the number of ocean-related establishments grew by a moderate 14.4 percent and the employment associated with these establishments grew by 34.5 percent (National Ocean Economics Program, 2012).

There are 27 hotels, four bed and breakfasts, and two campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In 2010, visitor accommodations grossed \$992,280 in lodging tax revenue, which includes taxes on campgrounds (County of Brunswick Board of County Commissioners, 2011). Of all of the housing units in Brunswick County, 30.9 percent are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The industries associated with marinas, boat dealers, and pleasure boat rentals also provide employment. The U.S. Bureau of Labor Statistics data reflect seasonal nature of these industries.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Brunswick County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	28	44	0	-100.0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	21	26	22	-42.1%
Renting Pleasure Boats (532292)	0	14	8	-**
Land-Based				
Hotel Employment (72111)	0	0	0	-100.0%
Restaurant Employment (7221 & 7222)	2,308	3,418	2,917	20.3%
Amusement, Gambling, Other Recreation (713)	1,115	1,476	1,317	8.0%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	0	0	0	-^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Carteret County, North Carolina

1. Synopsis

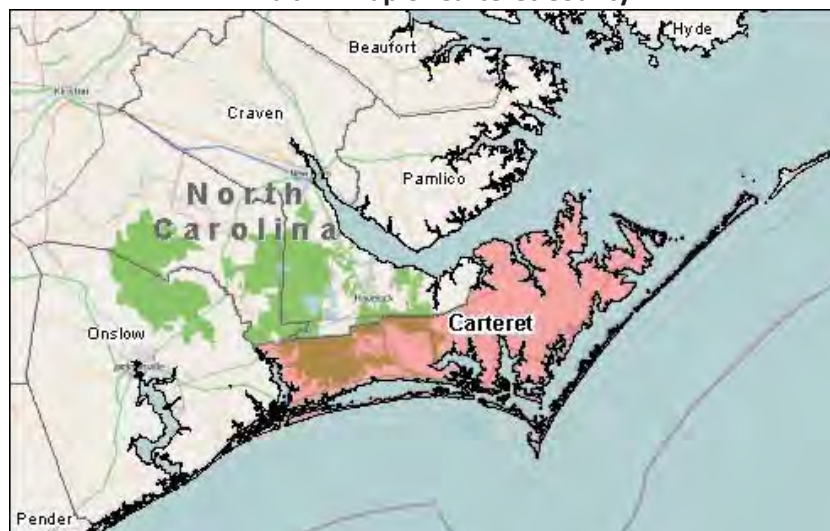
Carteret County is located on the coast of North Carolina. It is considered part of the Crystal Coast, an 85-mile long section of the North Carolina shoreline with protected beaches (Crystal Coast Tourism Authority, 2012). The County is known for its family-friendly beaches and its world-acclaimed shipwreck diving. It is comprised of 11 cities and towns and numerous unincorporated communities. Almost 66,500 people reside in Carteret County; the County has a population density of 131 people per square mile and a housing density of 95 units per square mile (U.S. Census Bureau, 2010). Tourism is a major contributor to the County's economy, along with sport fishing, manufacturing, and construction.

Tourism represents a significant portion of the ocean economy in Carteret County. In 2009, 294 ocean-related establishments directly employed 3,497 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 91.3 percent of the ocean-related jobs in Carteret County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the nearly 300 ocean recreation and tourism-related establishment in Carteret County, 71.9 percent are small (U.S. Census Bureau, 2009).¹

2. Location

Carteret County, as shown in Exhibit 1, is considered part of North Carolina's Crystal Coast, or Southern Outer Banks, an 85-mile long section of the North Carolina shoreline with protected beaches (Crystal Coast Tourism Authority, 2012; Carteret County Chamber of Commerce, 2012). Adjacent counties include Craven County (to the north), Pamlico County (to the north), Hyde County (to the northeast), Onslow County (to the southwest), and Jones County (to the northwest) (Google, Inc., 2012). The County has 506 square miles of land and 75 miles of shoreline (Carteret County, North Carolina Board of Commissioners, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Carteret County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Carteret County is accessible by car, on North Carolina Routes 58 and 24 and U.S. Highway 70. Air travel to Carteret is also possible through the Beaufort-Morehead City Airport. Rail and port infrastructure also exists (Google, Inc., 2012).

3. Demographics

Carteret County has a year-round population of 66,469 (U.S. Census Bureau, 2010). The following three tables profile Carteret County's population. As Exhibit 2 shows, the demographics of Carteret County are similar to those of the rest of the State. Over the past decade, the population of Carteret County grew by 11.9 percent. This rate generally mirrors that of the State population growth, at 18.5 percent.

Exhibit 2. Population Profile

	Carteret	North Carolina
Year-Round Population	66,469	8,049,313
Population Change (2000-2010) (%)	11.9%	18.5%
Median Age (Years)	45.8	37.4
Percent Female (%)	50.6%	7.4%
Percent Foreign Born (%)	3.6%	51.3%
<i>Ethnic Profile</i>		
White (%)	89.3%	68.5%
Black/African American (%)	6.1%	21.5%
Asian (%)	0.9%	2.2%
Hispanic/Latino (%)	3.4%	8.4%
American Indian (%)	0.5%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Carteret	North Carolina
Unemployment Rate (%)	8.6%	8.8%
Percent Out of Labor Force (%)	38.3%	35.1%
Median Household Income (\$)	\$46,155	\$45,570
Percent of Pop. Below Poverty Line (%)	12.2%	15.5%
<i>Educational Attainment</i>		
High School Diploma (%)	29.1%	27.5%
Bachelor's Degree (%)	15.6%	17.6%
Graduate/Professional Degree (%)	8.3%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Carteret	North Carolina
Population Density (people/sq. mile)	131.3	196.1
Housing Density (structures/sq. mile)	95.2	87.0
Housing Structures that are Independent Units (%)	55.9%	65.1%
Occupied Units (%)	59.9%	86.5%
Properties for Seasonal, Rec. or Occasional Use (%)	32.0%	4.4%
Median House Value (\$)	\$207,500	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Spanish colonists arrived on the North Carolina coast in the 1500s but their settlement did not endure. When they abandoned the community, they also left horses brought from Spain. The wild herds now roam the Shackleford Banks of Carteret County.

Before settlement by Europeans, present-day Carteret County was inhabited by the Coree, or Neuse River, tribe. By the early 1700s, the Coree population had diminished to about 125 people due to infectious disease and warfare.

Carteret County was founded in 1722 and named after the Carteret family, which included Sir George Carteret, a colonial proprietor, and Sir John Carteret, the Earl of Granville. Carteret County was the birthplace of the first male child of English parents born in North Carolina.

Carteret's early economy developed around the production of tar, pitch, resin, and turpentine. Trade of fish, tobacco, lumber, and deer skins also contributed to the local economy.

In the mid-1800s, the Governor of North Carolina, John Motley Morehead, envisioned a railroad town in Carteret County that would be "the New York City of the South." Although it developed differently than he imagined, Morehead City is now Carteret County's largest town. It celebrated its 150th birthday in 2007 with the tagline, "A bit of heaven since 1857."

Carteret County was intimately involved in Civil War battle. Confederate troops attacked the Cape Lookout Lighthouse and seized Carteret's Fort Macon in 1861, although they surrendered during the Union bombardment in 1862. Fort Macon State Park is now a destination for tourists to learn about the County's military history (Carteret County Chamber of Commerce, 2012).

Carteret County hosts several annual maritime festivals. These include: the Big Rock Blue Marlin Tournament and the North Carolina Seafood Festival (Crystal Coast Tourism Authority, 2012).

5. Coastal Amenities

Carteret County sports 75 miles of shoreline (Carteret County, North Carolina Board of Commissioners, 2012). There are seven public beaches, 22 marinas, and 15 yacht clubs (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). Federally protected areas in Carteret County include the Cape Lookout National Seashore (28,243 acres), Cedar Island National Wildlife Refuge (14,480 acres), and part of the Croatan National Forest (159,886 acres extended across Carteret, Craven, and Jones Counties) (U.S. National Park Service, 2012).

Carteret County has two historically significant coastal landmarks, the Cape Lookout Lighthouse, which is the County's most recognizable landmark, and Fort Macon State Park, which is North Carolina's most visited state park. The area offshore Carteret County, known as the "Graveyard of the Atlantic," is another significant tourist attraction with more than 2,000 sunken ships, including the historic German U-boat 352 (Carteret County Chamber of Commerce, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 2,049 business establishments in Carteret County in 2009 (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). According to the County's 2011 Annual Financial Report, the largest employers in the County are: the Carteret County Public Schools and Carteret General Hospital, each with over 1,000 employees (Carteret County, North Carolina Finance Department, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Carteret County centers on the “shimmering waters” and the Crystal Coast beaches, dubbed “the best in the world” by Carteret’s Chamber of Commerce. Visitors can enjoy the Atlantic Ocean by swimming with sharks, surfing the waves, boating from one of Carteret’s many marinas, kayaking, or fishing in the warm Gulf Stream waters. Sport fishing in Carteret is an \$11 million industry and the County hosts the Big Rock Blue Marlin Tournament every summer with a \$1.6 million prize. Visitors can also explore the “Graveyard of the Atlantic,” where over 2,000 ships have sunk over the years. Carteret’s coast is considered one of the world’s most acclaimed shipwreck diving destinations.

On the beaches, tourists can stroll, collect shells, fly kites, and relax. They can also take ferries to the Cape Lookout National Seashore or watch the wild ponies on the Shackleford Banks.

To learn more about the County’s coast, visitors can tour the North Carolina Aquarium and the Core Sound Waterfowl Museum on Harkers Island, which highlights Carteret’s tradition of decoy carving. A visit to Fort Macon State Park affords tourists the chance to relive Carteret’s Civil War history through reenactments. Tourists can also take a walking, bus, or carriage tour of the County’s Old Burying Ground (Carteret County Chamber of Commerce, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 91.3 percent of the ocean-related jobs in Carteret County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$271.30 million in Carteret County, generating \$48.65 million in payroll income and supporting 2,990 jobs (North Carolina Department of Commerce, 2010). There are 285 establishments dedicated to leisure and hospitality in Carteret County; the average weekly wage for employees of these establishments is \$280. Leisure and hospitality employment in Carteret County increased by 2,196 jobs, or 67.67 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 71.9 percent of ocean recreation and tourism-related businesses in Carteret County are small (U.S. Census Bureau, 2009).²

In 2009, 294 ocean-related establishments directly employed 3,497 people in Carteret County. These data reflect a decrease in employment from 2000, when 293 establishments employed 4,149 people. From 2000 to 2009, employment by the ocean-related establishments declined by 15.7 percent (National Ocean Economics Program, 2012).

There are 31 hotels, 11 bed and breakfasts, and four campgrounds in the County (U.S. Census Bureau, 2009). In 2010, visitor accommodations grossed \$4,247,017 in lodging tax revenue, which includes taxes on campgrounds (Carteret County, North Carolina Board of Commissioners, 2012). Of all of the housing units in Carteret County, 32.0 percent are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The industries associated with marinas, boat dealers, pleasure boat rentals, and travel agencies

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

also provide employment. The U.S. Bureau of Labor Statistics data reflect seasonal nature of these industries.

Exhibit 5. Carteret County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	-100.0%
Marinas (713930)	117	173	143	-19.2%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	54	67	58	-42.6%
Renting Pleasure Boats (532292)	0	64	28	-**
Land-Based				
Hotel Employment (72111)	0	0	0	-100.0%
Restaurant Employment (7221 & 7222)	2,241	3,729	2,919	5.8%
Amusement, Gambling, Other Recreation (713)	430	832	610	-7.9%
General Tourism				
Travel Agencies (561510)	0	0	4	-20.0%
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Craven County, North Carolina

1. Synopsis

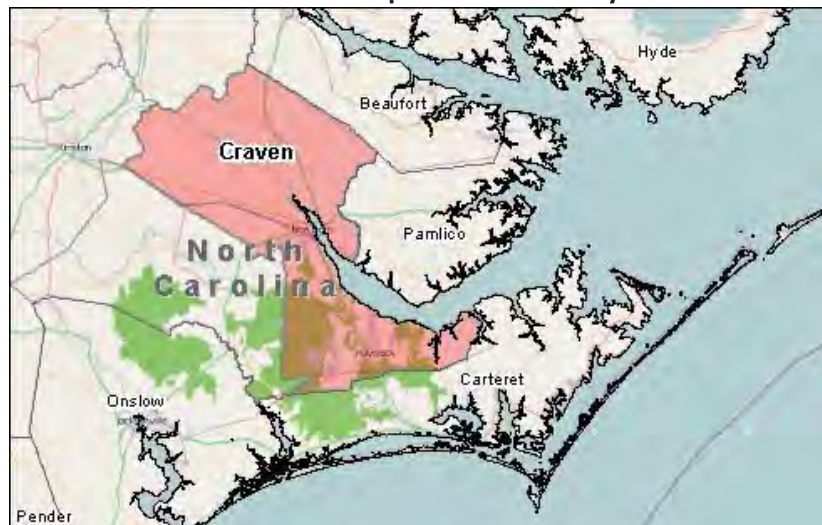
Craven County is located along the coast of North Carolina. The County is known for its colonial and Civil War history. About 103,500 people reside in Craven County, which has a population density of 146 people per square mile and a housing density of 63 units per square mile (U.S. Census Bureau, 2010). The Government, including local, state, and federal levels, is the primary employer in Craven County.

Tourism represents a large portion of the ocean economy in Craven County. In 2009, 152 ocean-related establishments directly employed 3,240 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 85.0 percent of the ocean-related jobs in Craven County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the 152 ocean recreation and tourism-related establishments in Craven County, 67.7 percent are considered small (U.S. Census Bureau, 2009).¹

2. Location

Craven County is located at the confluence of the Neuse and Trent Rivers along the coast of North Carolina. Adjacent counties include Beaufort County (to the northeast), Pamlico County (to the east), Carteret County (to the southeast), Jones County (to the southwest), Lenoir County (to the west), and Pitt County (to the northwest) (Google, Inc., 2012). The County has 709 square miles of land and miles of shoreline along the Trent and Neuse Rivers (U.S. Census Bureau, 2010).

Exhibit 1. Map of Craven County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Craven County is easily accessible by car on Highways 70 and 17. The County provides public transportation through CARTS, a system that operates van and bus routes through Craven and neighboring counties. Plane infrastructure also exists, with the Coastal Carolina Regional Airport located at New Bern (Craven County Government, 2011; Google, Inc., 2012).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

3. Demographics

Craven County has a year-round population of 103,505 (U.S. Census Bureau, 2010). The following three tables profile Craven County's population. As Exhibit 2 shows, the population of Craven County has grown by 13.2 percent over the past decade, which is slightly lower than the growth rate of the State population (18.5 percent).

Exhibit 2. Population Profile

	Craven	North Carolina
Year-Round Population	103,505	8,049,313
Population Change (2000-2010) (%)	13.2%	18.5%
Median Age (Years)	36.2	37.4
Percent Female (%)	50.3%	7.4%
Percent Foreign Born (%)	4.7%	51.3%
<i>Ethnic Profile</i>		
White (%)	70.0%	68.5%
Black/African American (%)	22.4%	21.5%
Asian (%)	2.0%	2.2%
Hispanic/Latino (%)	6.1%	8.4%
American Indian (%)	0.5%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Craven	North Carolina
Unemployment Rate (%)	9.5%	8.8%
Percent Out of Labor Force (%)	38.0%	35.1%
Median Household Income (\$)	\$44,599	\$45,570
Percent of Pop. Below Poverty Line (%)	16.0%	15.5%
<i>Educational Attainment</i>		
High School Diploma (%)	28.4%	27.5%
Bachelor's Degree (%)	14.2%	17.6%
Graduate/Professional Degree (%)	7.1%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Craven	North Carolina
Population Density (people/sq. mile)	146.0	196.1
Housing Density (structures/sq. mile)	63.5	87.0
Housing Structures that are Independent Units (%)	63.3%	65.1%
Occupied Units (%)	89.5%	86.5%
Properties for Seasonal, Rec. or Occasional Use (%)	1.6%	4.4%
Median House Value (\$)	\$151,500	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Craven County was formed in 1712 with land for the former Bath County. It was named after the Earl of Craven, one of the original proprietors of North Carolina. The County Seat, New Bern, was North Carolina's first capitol and remained the State capitol until 1794. Tryon Palace, the residence of North

Carolina's Royal Governor William Tryon, was built in Craven. Following the American Revolution, it was used by four State governors and visited by George Washington.

New Bern became a prominent river port in the 1700s; its commercial importance grew further with the introduction of the railroad in the 1800s.

Craven County was a site of battle during the Civil War. Union troops occupied New Bern for much of the war; due to the Union occupation, it did not suffer the damage that surrounding areas did.

Craven's military significance continued into the 1900s, when the Marine Corps established the Cherry Point Air Station. The Station brought a surge of new residents to the area. As military personnel began to retire, Craven County became a popular retirement destination due to its climate, cost of living, and quality of life (Craven County Government, 2011; Martin, 2011).

Craven County hosts several festivals, including the Civil War Days, RiverFest, MUMfest, and "Life's a Beach" Reverse Drawing (North Carolina Coast Host, 2012).

5. Coastal Amenities

Craven County has one public beach, seven marinas, and five yacht clubs (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). The County covers part of the federally protected Croatan National Forest (159,886 acres extended across Craven, Craven, and Jones Counties) (Google, Inc., 2012; U.S. Department of Agriculture, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 2,306 business establishments in Craven County in 2009 (U.S. Census Bureau, 2009). According to the County's 2011 Annual Financial Report, the five largest employers in the County are: the U.S. Department of Defense, CarolinaEast Health Systems, Craven County Schools, State of North Carolina, and BSH Home Appliances. As the largest employer, the U.S. Department of Defense supports 5,408 jobs, followed by the CarolinaEast Health Systems, with 2,100 employees, and the Craven County Schools, with 1,917 employees (Craven County, North Carolina Finance Department, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Craven County focuses primarily on the region's history. A county guide recommends visiting historic sites like Tryon Palace, the residence of Royal Governor William Tryon, Foscue Plantation, and the New Bern Civil War Battlefield. Heritage tours provide a more structured introduction to the County's past. For a taste of more recent history, tourists can visit the Birthplace of Pepsi Store and Soda Fountain.

Tourists in Craven County can also enjoy the County's abundant natural resources. The County houses part of the Croatan National Forest. It boasts 40 miles of navigable rivers, as well as many lakes. Outdoor activities in Craven include camping, biking, hiking, kayaking, and golfing (Craven County Government, 2011).

According to the National Oceanic and Atmospheric Administration, an estimated 85.0 percent of the ocean-related jobs in Craven County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$108.29 million in Craven County, generating \$20.51 million in payroll income and supporting 1,030 jobs (North Carolina Department of

Commerce, 2010). There are 220 establishments dedicated to leisure and hospitality in Craven County; the average weekly wage for employees of these establishments is \$243. Leisure and hospitality employment in Craven County increased by 498 jobs, or 13.43 percent, from winter to summer in 2010, reflecting the somewhat seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 67.7 percent of ocean recreation and tourism-related businesses in Craven County are small (U.S. Census Bureau, 2009).²

In 2009, 152 ocean-related establishments directly employed 3,240 people in Craven County. This reflected only slight change from 2000, when 152 establishments employed 3,240 people. From 2000 to 2009, the number of ocean-related establishments grew by a modest 1.3 percent and the employment associated with these establishments decreased by 12.6 percent (National Ocean Economics Program, 2012).

There are 23 hotels, seven bed and breakfasts, and three campgrounds in the County (U.S. Census Bureau, 2009). In the Fiscal Year ending in 2011, the occupancy tax generated \$464,875 for the Craven County Tourism Development Authority Fund (Craven County, North Carolina Finance Department, 2011). Only 1.60 percent of the housing units in Craven County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry and the hotel industry. The industries associated with marinas and travel agencies also provide employment. The U.S. Bureau of Labor Statistics data reflect the somewhat seasonal nature of these industries.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Craven County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	- [^]
Marinas (713930)	10	13	11	83.3%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	0	0	0	-100.0%
Renting Pleasure Boats (532292)	-	-	-	- [^]
Land-Based				
Hotel Employment (72111)	247	279	273	-22.4%
Restaurant Employment (7221 & 7222)	2,952	3,330	3,191	11.5%
Amusement, Gambling, Other Recreation (713)	434	520	465	19.2%
General Tourism				
Travel Agencies (561510)	9	9	9	- ^{**}
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Currituck County, North Carolina

1. Synopsis

Currituck County is located in the northeasternmost corner of North Carolina. The County is known for its wide, sandy beaches and its many options for outdoor recreation. Almost 24,000 people call Currituck home; the County has a population density of 90 people per square mile and a housing density of 55 units per square mile (U. S. Census Bureau, 2010). Tourism provides the economic base in Currituck County.

Tourism represents a significant portion of the ocean economy in Currituck County. In 2009, 65 ocean-related establishments directly employed 451 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 93.1 percent of the ocean-related jobs in Currituck County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). The majority –76.7 percent—of the ocean recreation and tourism-related establishments in Currituck County are small (U.S. Census Bureau, 2009).¹

2. Location

Currituck County is located in the northeasternmost corner of North Carolina. Adjacent counties include Chesapeake County (to the north) and Virginia Beach County (to the north) in Virginia and Dare County (to the southeast) and Camden County (to the west) in North Carolina (Google, Inc., 2012). The County has 262 square miles of land and almost 20 miles of shoreline (Currituck County Department of Travel and Tourism, 2012; U. S. Census Bureau, 2010).

Exhibit 1. Map of Currituck County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Currituck County is accessible by car on U.S. Routes 168 and 158 and North Carolina Routes 12 and 615. The closest major airport is in Norfolk, Virginia, although Currituck County also has a regional airport

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

(Google, Inc., 2012). The Currituck County Ferry provides boat transportation across the Currituck Sound (Currituck County, 2012b).

3. Demographics

Currituck County has a year-round population of 23,547 (U. S. Census Bureau, 2010). The following three tables profile Currituck County’s population. As Exhibit 2 shows, at 29.5 percent, the population growth in Currituck County has outpaced the state population growth of 18.5 percent over the past decade.

Exhibit 2. Population Profile

	Currituck	North Carolina
Year-Round Population	23,547	8,049,313
Population Change (2000-2010) (%)	29.5%	18.5%
Median Age (Years)	41.3	37.4
Percent Female (%)	50.4%	7.4%
Percent Foreign Born (%)	3.2%	51.3%
<i>Ethnic Profile</i>		
White (%)	90.3%	68.5%
Black/African American (%)	5.8%	21.5%
Asian (%)	0.6%	2.2%
Hispanic/Latino (%)	3.0%	8.4%
American Indian (%)	0.5%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Currituck	North Carolina
Unemployment Rate (%)	8.9%	8.8%
Percent Out of Labor Force (%)	30.3%	35.1%
Median Household Income (\$)	\$55,376	\$45,570
Percent of Pop. Below Poverty Line (%)	8.5%	15.5%
<i>Educational Attainment</i>		
High School Diploma (%)	33.7%	27.5%
Bachelor’s Degree (%)	12.2%	17.6%
Graduate/Professional Degree (%)	5.1%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Currituck	North Carolina
Population Density (people/sq. mile)	89.9	196.1
Housing Density (structures/sq. mile)	55.2	87.0
Housing Structures that are Independent Units (%)	79.0%	65.1%
Occupied Units (%)	61.4%	86.5%
Properties for Seasonal, Rec. or Occasional Use (%)	31.8%	4.4%
Median House Value (\$)	\$240,000	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

One of the first areas settled by Europeans in the United States, Currituck County was officially founded in 1668. Its name derives from an Algonquin term meaning, “Land of the Wild Goose,” an appropriate

title given Currituck position in the Atlantic Flyway; thousands of migratory birds pass through Currituck's marshes and mud flats each year.

Prior to settlement by Europeans, the Yeopim and Pasquotank tribes lived in the area of present-day Currituck. As English and French settlers arrived in the area, the Yeopim and Paquotank moved away from the area.

By the early 1800s, Currituck County was already a well-known fishing community. In 1859, the opening of the Albemarle Chesapeake Waterway allowed vessels to travel from Florida to Maine through Currituck County. The County developed marinas and restaurants along the Waterway. Within half a century, Currituck had developed into a popular tourist destination among wealthy businessmen; it was considered a "sportsman's paradise" for its abundant wildlife and its many hunting clubs (Currituck County, 2012a; Martin, 2011).

Currituck County hosts several annual festivals, including the Currituck County Resource Fair, Corolla Seafood Festival, and Currituck Wildlife Festival (Martin, 2011).

5. Coastal Amenities

Currituck County has almost 20 miles of coastline along the Atlantic Ocean and Currituck Sound, as well as six public beaches, one marina, and two yacht clubs (Coastal Travel Guide, 2012; Currituck County Department of Travel and Tourism, 2012; U.S. Census Bureau, 2009). The County includes two wildlife refuges: Currituck National Wildlife Refuge (8,501 acres) and part of Mackay Island National Wildlife Refuge (8,219 acres on Knotts Island) (Currituck County Department of Travel and Tourism, 2012; U.S. Department of the Interior, 2008).

Currituck County has several important historical landmarks. These include: the County Courthouse and Jail; the Whalehead Club, one of Currituck's original hunt clubs; and the Currituck Beach Lighthouse, which has guided ships through the County's shipwreck-prone coastal waters (Currituck County Department of Travel and Tourism, 2011).

6. General Economic Situation

The U.S. Census Bureau lists 594 business establishments in Currituck County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Currituck County Board Of Education, Currituck County, AAR Airlift Group, and Food Lion LLC. As the largest employer, the Currituck County Board Of Education supports over 500 jobs (Currituck County Finance Department, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Currituck County is focused on outdoor sporting activities, such as hunting and fishing. Currituck's two wildlife refuges provide opportunities for birding, hiking, kayaking, and watching the coast's wild mustangs. Visitors can also relax and swim on the Currituck Outer Banks sandy beaches. Vineyards and golf courses offer tourists an alternative to the beach (Currituck County Department of Travel and Tourism, 2011).

According to the National Oceanic and Atmospheric Administration, an estimated 93.1 percent of the ocean-related jobs in Currituck County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$117.12 million in Currituck County, generating \$21.84 million in payroll income and supporting 1,380 jobs (North Carolina Department of Commerce, 2010). There are 87 establishments dedicated to leisure and hospitality in Currituck County;

the average weekly wage for employees of these establishments is \$327. Leisure and hospitality employment in Currituck County increased by 527 jobs, or 106.46 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 76.7 percent of ocean recreation and tourism-related businesses in Currituck County are small (U.S. Census Bureau, 2009).²

In 2009, 65 ocean-related establishments directly employed 451 people in Currituck County. These numbers reflect a slight change from 2000, when 63 establishments employed 489 people. From 2000 to 2009, the number of ocean-related establishments grew by a modest 3.2 percent and the employment associated with these establishments decreased by 7.8 percent (National Ocean Economics Program, 2012).

There are five hotels, five bed and breakfasts, and one campground in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In 2011, visitor accommodations grossed \$9,442,002 in lodging tax revenue, which includes taxes on campgrounds (Currituck County Finance Department, 2011). Approximately 31.8 percent of the housing units in Currituck County are for seasonal, recreational, or occasional use (U. S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The U.S. Bureau of Labor Statistics data reflect the seasonal nature of these industries.

Exhibit 5. Currituck County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	- [^]
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	-	-	-	- [^]
Boat Dealers (441222)	-	-	-	- [^]
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	-	-	-	- [^]
Restaurant Employment (7221 & 7222)	235	724	511	9.9%
Amusement, Gambling, Other Recreation (713)	118	228	184	-22.7%
General Tourism				
Travel Agencies (561510)	-	-	-	- [^]
Tour Operators (561520)	0	0	0	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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Dare County, North Carolina

1. Synopsis

Dare County is located on the Atlantic coast of North Carolina. The County is known for its beaches and its colonial history. Dare includes the site of “The Lost Colony,” the first permanent European settlement in the United States, whose disappearance has remained an unsolved mystery (The Outer Banks Visitors Bureau, 2012b). Dare County is comprised of six cities and towns and numerous unincorporated communities. Almost 34,000 people reside in Dare County; the County has a population density of 89 people per square mile and a housing density of 87 units per square mile (U.S. Census Bureau, 2010). Dare County’s economy depends on its tourism industry.

Tourism represents a significant portion of the ocean economy in Dare County. In 2009, 269 ocean-related establishments directly employed 3,746 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 89.7 percent of the ocean-related jobs in Dare County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). The majority—80.0 percent—of ocean recreation and tourism-related establishments in Dare County are small (U.S. Census Bureau, 2009).¹

2. Location

Dare County, shown in Exhibit 1, is located on the Atlantic coast of North Carolina. Adjacent counties include Currituck County (to the north), Hyde County (to the southwest), and Tyrrell County (to the west) (Google, Inc., 2012). Dare is the largest county in North Carolina by total land area, although much of the area is water. The County has 383 square miles of land and over 100 miles of shoreline (The Outer Banks Visitors Bureau, 2012a; U.S. Census Bureau, 2010).

Exhibit 1. Map of Dare County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Dare County is accessible by car, boat, and plane. U.S. Routes 158 and 64 crisscross through Dare (Google, Inc., 2012). North Carolina Department of Transportation operates a ferry through the waters off the coast of the Outer Banks. Dare County has a regional airport with charter flights. The closest major airport is Norfolk International Airport, located about 80 miles away in Norfolk, Virginia (The Outer Banks Visitors Bureau, 2012b).

3. Demographics

Dare County has a year-round population of 33,920 (U.S. Census Bureau, 2010). The following three tables profile Dare County's population. As Exhibit 2 shows, at 13.2 percent growth, the population in Dare County has increased, although at a rate less than the state population growth rate of 18.5 percent, over the past decade.

Exhibit 2. Population Profile

	Dare	North Carolina
Year-Round Population	33,920	8,049,313
Population Change (2000-2010)	13.2%	18.5%
Median Age (Years)	43.6	37.4
Percent Female	50.0%	7.4%
Percent Foreign Born	5.2%	51.3%
<i>Ethnic Profile</i>		
White	92.3%	68.5%
Black/African American	2.5%	21.5%
Asian	0.6%	2.2%
Hispanic/Latino	6.5%	8.4%
American Indian	0.4%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Dare	North Carolina
Unemployment Rate	6.5%	8.8%
Percent Out of Labor Force	30.2%	35.1%
Median Household Income	\$53,889	\$45,570
Percent of Pop. Below Poverty Line	10.5%	15.5%
<i>Educational Attainment</i>		
High School Diploma	27.2%	27.5%
Bachelor's Degree	21.9%	17.6%
Graduate/Professional Degree	10.2%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Dare	North Carolina
Population Density (people/sq. mile)	88.5	196.1
Housing Density (structures/sq. mile)	87.4	87.0
Housing Structures that are Independent Units	82.0%	65.1%
Occupied Units	42.8%	86.5%
Properties for Seasonal, Rec. or Occasional Use	44.0%	4.4%
Median House Value	\$342,100	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

In 1587, a group of 117 English settlers arrived at Roanoke Island in present-day Dare County and established America's first permanent European settlement. Among the settlers were the parents of Virginia Dare, the first child born in the Americas to English parents and the namesake of Dare County. The settlement was abandoned within a few years and the fate of its inhabitants remains a mysterious. Roanoke settlement is known today as "The Lost Colony."

When Europeans arrived in present-day Dare County, the Croatan and larger Roanoke tribes were living in the area. The Croatan and Roanoke assisted the settlers and several of the tribes' leaders visited England. However, the introduction of infectious disease diminished the Croatan population until, in early 1600s, the tribe became extinct.

Up until the American Revolution, the coast was alternately ruled by colonial proprietors, pirates, and the English crown. Through the 1800s and early 1900s, the coast was ravaged both by shipwrecks, including the sinking of the USS Monitor in 1862, and war. The Union troops invaded the coast during the Civil War, capturing Fort Hatteras. In both World War I and World War II, German submarines patrolled the waters off the coast of the Outer Banks. The coast focused on industries like ship building.

Since the mid-1900s, the Outer Banks has developed into a popular tourist destination both for domestic and international travelers. Tourism has replaced other industries as a primary economic driver of the region (Martin, 2011).

Dare County hosts several annual events, including the Dare Day Festival, Annual Hang Gliding Spectacular, and Outer Banks Taste of the Beach (Dare County Government, 2012a; The Outer Banks Visitors Bureau, 2012b).

5. Coastal Amenities

Dare County has over 100 miles of shoreline along the Atlantic Ocean, East Lake, Albemarle Sound, Croatan Sound, and Pamlico Sound (Outer Banks Visitors Bureau, 2012a). The County has two public beaches, 10 marinas, and 13 yacht clubs (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). There are five national protected areas in Dare County: the Pea Island National Wildlife Refuge (6,000 acres), Wright Brothers National Memorial, Fort Raleigh National Historic Site, part of Alligator River National Wildlife Refuge (152,000 acres in Dare and Hyde Counties), and part of Cape Hatteras National Seashore (30,000 acres in Dare and Hyde Counties) (Martin, 2011; The Outer Banks Visitors Bureau, 2012b; U.S. Fish and Wildlife Service, 2012).

There are two famous lighthouses in Dare County: the Cape Hatteras Lighthouse and the Bodie Island Lighthouse (The Outer Banks Visitors Bureau, 2012b).

6. General Economic Situation

The U.S. Census Bureau lists 1,893 business establishments in Dare County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Dare County Schools, which employed 784 in 2011, and the Dare County Government, which employed 739 people (Dare County, North Carolina Department of Finance, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Dare County centers on the region's history. The County claims to be "America's Birthplace," having been the site of the first permanent European settlement in the nation. History buffs can choose among many sites to explore, including the landing point of the settlers of "The Lost Colony," Fort Raleigh National Historic Site, and the sands of Kitty Hawk, where the Wright Brothers made their first flight. Outdoor recreation also represents an important part of Dare's tourism. Activities include swimming, beach strolling, fishing, birdwatching, and windsurfing (The Outer Banks Visitors Bureau, 2012b).

According to the National Oceanic and Atmospheric Administration, an estimated 89.7 percent of the ocean-related jobs in Dare County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$834.29 million in Dare County, generating \$172.00 million in payroll income and supporting 11,260 jobs (North Carolina Department of Commerce, 2010). There are 381 establishments dedicated to leisure and hospitality in Dare County; the average weekly wage for employees of these establishments is \$359. Leisure and hospitality employment in Dare County increased by 4,057 jobs, or 146.89 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 80 percent of ocean recreation and tourism-related businesses in Dare County are small (U.S. Census Bureau, 2009).²

In 2009, 269 ocean-related establishments directly employed 3,746 people in Dare County. These numbers reflected a decrease from 2000, when 299 establishments employed 3,881 people. From 2000 to 2009, the number of ocean-related establishments decreased by 10.0 percent and the employment associated with these establishments decreased by 3.5 percent (National Ocean Economics Program, 2012).

There are 24 hotels, five bed and breakfasts, and four campgrounds in the County (U.S. Census Bureau, 2009). In 2010-2011, visitor accommodations grossed \$7,138,147 in occupancy tax revenue, which includes taxes on campgrounds (Dare County, North Carolina Department of Finance, 2011). Approximately 44.0 percent of the housing units in Dare County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The U.S. Bureau of Labor Statistics data reflect the seasonal nature of these industries.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Dare County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	127	68	21.4%
Marinas (713930)	20	33	26	-40.9%
Boat Building and Repair (336612)	246	227	223	-56.2%
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	0	153	66	-**
Land-Based				
Hotel Employment (72111)	685	1138	914	33.2%
Restaurant Employment (7221 & 7222)	1738	4603	3197	-5.5%
Amusement, Gambling, Other Recreation (713)	141	375	245	-27.7%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

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Hyde County, North Carolina

1. Synopsis

Hyde County is located in the northeast of North Carolina. The County is known for having expanses of wildlife refuges and for being the resting place of Blackbeard the Pirate. Hyde County consists of five inhabited townships and a sixth township occupied by the Mattamuskeet National Wildlife Refuge (Hyde County Office of Tourism, 2012). About 5,800 people reside in Hyde County; the County has a population density of 10 people per square mile and a housing density of 6 units per square mile (U.S. Census Bureau, 2010). The mainland's economy depends on agriculture and commercial fishing, while the economy of Hyde's Ocracoke Island depends on tourism.

Tourism represents a large portion of the ocean economy in Hyde County, although it is less significant in Hyde County than in neighboring coastal counties. In 2009, 32 ocean-related establishments directly employed 335 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 66.6 percent of the ocean-related jobs in Hyde County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Of the 32 ocean recreation and tourism-related businesses in Hyde County, 85.0 percent are small (U.S. Census Bureau, 2009).¹

2. Location

Hyde County, shown in Exhibit 1, is located in the northeast of North Carolina. Adjacent counties include Tyrrell County (to the north), Dare County (to the northeast), Carteret County (to the southwest), Beaufort County (to the west), and Washington County (to the northwest). Pamlico Sound lies to the east, the Atlantic Ocean to the south (Google, Inc., 2012). The County has 613 square miles of land and 17 miles of Atlantic shoreline (Greater Hyde County Chamber of Commerce, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Hyde County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Hyde County is primarily accessible by car. North Carolina (NC) Route 94 runs from the north into the center of the County. NC Route 45 and U.S. Route 264 wrap through the County from the northwestern corner to the eastern side. Plane infrastructure also exists. Hyde County has two regional airports, one of which lies on Ocracoke Island (Google, Inc., 2012). The Island is only accessible by plane or ferry. The County operates public buses and ferries (Hyde County Office of Tourism, 2012).

3. Demographics

Hyde County has a year-round population of 5,810 (U.S. Census Bureau, 2010). The following three tables profile Hyde County’s population. As Exhibit 2 shows, the population has declined by 0.3 percent in Hyde County over the past decade. The state population grew by 18.5 percent over the same time period.

Exhibit 2. Population Profile

	Hyde	North Carolina
Year-Round Population	5,810	8,049,313
Population Change (2000-2010) (%)	-0.3%	18.5%
Median Age (Years)	41.2	37.4
Percent Female (%)	44.5%	51.3%
Percent Foreign Born (%)	4.6%	7.4%
<i>Ethnic Profile</i>		
White (%)	64.0%	68.5%
Black/African American (%)	31.6%	21.5%
Asian (%)	0.3%	2.2%
Hispanic/Latino (%)	7.1%	8.4%
American Indian (%)	0.5%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Hyde	North Carolina
Unemployment Rate	4.8%	8.8%
Percent Out of Labor Force	56.3%	35.1%
Median Household Income	\$38,265	\$45,570
Percent of Pop. Below Poverty Line	20.4%	15.5%
<i>Educational Attainment</i>		
High School Diploma	37.0%	27.5%
Bachelor's Degree	9.8%	17.6%
Graduate/Professional Degree	1.9%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Hyde	North Carolina
Population Density (people/sq. mile)	9.5	196.1
Housing Density (structures/sq. mile)	5.5	87.0
Housing Structures that are Independent Units	75.6%	65.1%
Occupied Units	63.3%	86.5%
Properties for Seasonal, Rec. or Occasional Use	15.6%	4.4%
Median House Value	\$95,600	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Europeans first arrived in Hyde County in 1585 and met the Algonkian tribe. During the 1600s and 1700s, the rich soil and abundant wildlife attracted settlers from surrounding areas. Hyde County was formed as Wickham Precinct within the former Bath County on December 3, 1705. It was renamed Hyde Precinct in 1712 in honor of the Governor of North Carolina, Edward Hyde, and became Hyde County when Bath County was abolished in 1739. Over the years, Hyde County's boundaries have changed more than any other county in North Carolina.

Conflicts developed between the resident tribes and the settlers, leading to the Tuscaora War of 1711. After the war, the Algonkians were assigned the Mattamuskeet Reservation, but by 1761, they had sold the reservation land and moved away from the area.

In the 1800s, Hyde County's mainland developed a plantation agriculture economy. However, the farms were raided during the Civil War, following which Hyde became the center of a growing timber industry. The mill communities thrived through 1930s, when the coast's supply of timber dwindled.

In the 1900s, Hyde County also housed the largest pumping plant in the world. The plant was used to drain a portion of Lake Mattamuskeet, North Carolina's largest lake, to create farmland. When the costs of drainage outweighed the benefits, the area was sold to the Federal Government, which established the Mattamuskeet National Wildlife Refuge. The Refuge continues to attract tourists and sportsmen (the U.S. Fish and Wildlife Service permits licensed individuals to hunt, fish, and crab in the Refuge).

Hyde County's Ocracoke Island was once home to the infamous pirate Blackbeard. It is now a popular tourist destination, known for its beaches, wildlife, and island lore. Residents of Ocracoke rely on tourism to make a living (Greater Hyde County Chamber of Commerce, 2012; Hyde County Office of Tourism, 2012).

Agriculture and commercial fishing provide the economic base for the County mainland.

Hyde County hosts several annual events, including the Mattamuskeet NWR Refuge Tour, Ocracoke Festival, and Independence Day Festival in which the infamous Blackbeard the Pirate makes an appearance (Greater Hyde County Chamber of Commerce, 2012; Hyde County Office of Tourism, 2012).

5. Coastal Amenities

Hyde County has shoreline along the Pamlico Sound, Aliggator and Pungo Rivers, and the Atlantic Ocean. Ocracoke Island in Hyde County boasts 17 miles of Atlantic shoreline (Greater Hyde County Chamber of Commerce, 2012). There are about two public beaches, five marinas, and three yacht clubs in the County (Hyde County Office of Tourism, 2012; U.S. Census Bureau, 2009). Hyde has five national

protected areas: Mattamuskeet National Wildlife Refuge (50,180 acres), Swanquarter National Wildlife Refuge (16,411 acres), and parts of Pocosin Lakes National Wildlife Refuge (113,674 acres in Hyde, Tyrrell, and Washington Counties), Alligator River National Wildlife Refuge (152,000 acres in Hyde and Dare Counties), and Cape Hatteras National Seashore (30,350 acres in Hyde and Dare Counties) (Hyde County Office of Tourism, 2012; U.S. National Park Service, 2012).

North Carolina's oldest lighthouse, the Ocracoke Lighthouse, is located in Hyde County (Hyde County Office of Tourism, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 159 business establishments in Hyde County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the State Of North Carolina Department Of Correction and the Hyde County Board Of Education, both of which employ between 100 and 249 people (North Carolina Department of Commerce, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Hyde County centers on outdoor recreation, including birdwatching, hunting, biking, and fishing. Visitors can explore the numerous parks and wildlife refuges on the mainland. Ocracoke Island is famous for its beach, which is accessible only by plane and ferry.

Hyde County also attracts tourists interested in coastal history; it has over 200 buildings on the National Register of Historic Places. The County offers various walking, riding, biking, and boating historic tours (Hyde County Office of Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 66.6 percent of the ocean-related jobs in Hyde County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$30.90 million in Hyde County, generating \$5.92 million in payroll income and supporting 390 jobs (North Carolina Department of Commerce, 2010). There are 36 establishments dedicated to leisure and hospitality in Hyde County; the average weekly wage for employees of these establishments is \$337. Leisure and hospitality employment in Hyde County increased by 358 jobs, or 175.49 percent, from winter to summer in 2010, reflecting the seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 85.0 percent of ocean recreation and tourism-related businesses in Hyde County are small (U.S. Census Bureau, 2009).²

In 2009, 32 ocean-related establishments directly employed 335 people in Hyde County. These numbers reflect a decrease from 2000, when 55 establishments employed 540 people. From 2000 to 2009, the number of ocean-related establishments decreased by 41.8 percent and the employment associated with these establishments decreased by 38.0 percent (National Ocean Economics Program, 2012).

There are approximately 15 hotels, 10 bed and breakfasts, and nine campgrounds in the County (Hyde County Office of Tourism, 2012; U.S. Census Bureau, 2009). In 2011, visitor accommodations grossed \$399,467 in Ocracoke occupancy tax revenue, which includes taxes on campgrounds (Hyde County

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Finance Department, 2011). Approximately 15.6 percent of the housing units in Hyde County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry. The U.S. Bureau of Labor Statistics data reflect the seasonal nature of the industry.

Exhibit 5. Hyde County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	-	-	-	^
Boat Dealers (441222)	-	-	-	^
Renting Pleasure Boats (532292)	-	-	-	^
Land-Based				
Hotel Employment (72111)	0	0	0	0%
Restaurant Employment (7221 & 7222)	0	260	170	-11.9%
Amusement, Gambling, Other Recreation (713)	0	121	0	0%
General Tourism				
Travel Agencies (561510)	-	-	-	^
Tour Operators (561520)	-	-	-	^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

^No percent change calculated because either 2010 or 2005 data unavailable.

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New Hanover County, North Carolina

1. Synopsis

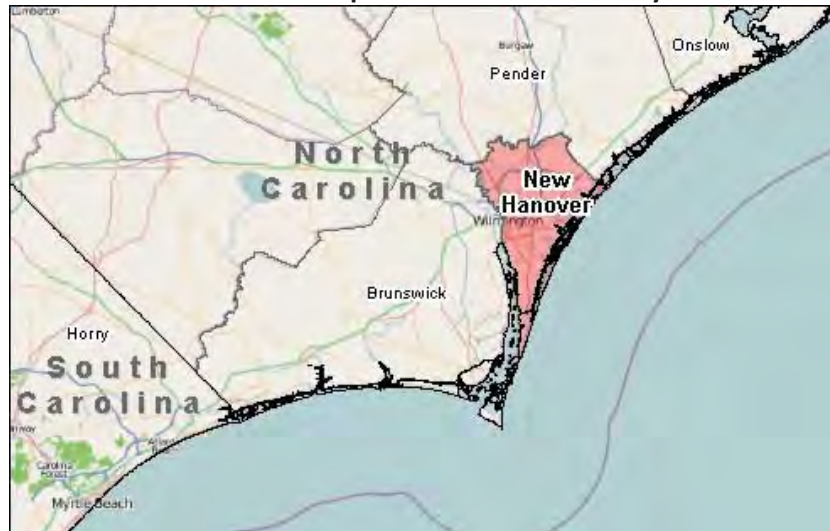
New Hanover County is located in the southeast of North Carolina. The County is known for its beaches, including Carolina Beach, Kure Beach, and Wrightsville Beach. New Hanover is comprised of five townships. The County is the second smallest in the State by land area but one of the most populous, with a population of 202,667, a population density of 1,058 people per square mile, and a housing density of 530 units per square mile (U.S. Census Bureau, 2010). Retail, tourism, filmmaking, light manufacturing, health care, and education are some of the key industries in New Hanover.

Tourism represents a significant portion of the ocean economy in New Hanover County. In 2009, 464 ocean-related establishments directly employed 9,603 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 92.0 percent of the ocean-related jobs in New Hanover County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). More than half—65.3 percent—of the ocean recreation and tourism-related businesses in New Hanover County are small (U.S. Bureau of Statistics, 2009).¹

2. Location

New Hanover County, shown in Exhibit 1, is located in the southeast of North Carolina. Adjacent counties include Pender County to the north and Brunswick County to the west (Google, Inc., 2012). The County has 199 square miles of land and 31 miles of shoreline along the Atlantic Ocean (North Carolina Visitors Network, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of New Hanover County



Source: ESRI, 2011 and OpenStreetMap, 2011.

New Hanover County is accessible by car and plane. New Hanover is crisscrossed by numerous highways: U.S. Routes 17, 74, 76, 117, and 421, Interstates I-20, I-40, and I-140, and North Carolina State

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Highways 132 and 133. Wilmington International Airport is located in New Hanover County. Water transport is also possible through the North Carolina Ports Authority in Wilmington (Google, Inc., 2012).

3. Demographics

New Hanover County has a year-round population of 202,667 (U.S. Census Bureau, 2010). The following three tables profile New Hanover County's population. As Exhibit 2 shows, at 26.4 percent, the population growth in New Hanover County has outpaced State population growth (18.5 percent) over the past decade.

Exhibit 2. Population Profile

	New Hanover	North Carolina
Year-Round Population	202,667	8,049,313
Population Change (2000-2010)	26.4%	18.5%
Median Age (Years)	37.3	37.4
Percent Female	51.5%	51.3%
Percent Foreign Born	5.3%	7.4%
<i>Ethnic Profile</i>		
White	79.1%	68.5%
Black/African American	14.8%	21.5%
Asian	1.2%	2.2%
Hispanic/Latino	5.3%	8.4%
American Indian	0.5%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	New Hanover	North Carolina
Unemployment Rate	7.7%	8.8%
Percent Out of Labor Force	33.3%	35.1%
Median Household Income	\$48,553	\$45,570
Percent of Pop. Below Poverty Line	15.4%	15.5%
<i>Educational Attainment</i>		
High School Diploma	22.5%	27.5%
Bachelor's Degree	24.2%	17.6%
Graduate/Professional Degree	11.9%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	New Hanover	North Carolina
Population Density (people/sq. mile)	1,058.1	196.1
Housing Density (structures/sq. mile)	529.6	87.0
Housing Structures that are Independent Units	62.4%	65.1%
Occupied Units	84.8%	86.5%
Properties for Seasonal, Rec. or Occasional Use	6.6%	4.4%
Median House Value	\$227,800	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to European settlement, the area of present-day New Hanover County was inhabited by the Cape Fear Indian tribe. The tribe sold a tract of land to English settlers in the mid-1600s. After a brief attempt to establish a community, the settlers left the area within months. Several other groups attempted to establish settlements in the region. It was not until the 1726 that colonists relocating from South Carolina were able to establish a successful community.

New Hanover was founded in 1729 as a precinct of former Bath County and was named after King George I of the House of Hanover in Great Britain. In 1739, Bath County was abolished and the precincts became counties. From its founding until 1875, the borders of New Hanover County changed many times, when new land was merged or sections were separated to form other counties.

As New Hanover grew, it developed industries around its major economic assets: soil and forest. Important industries in the County were naval activities, agriculture, and shipbuilding. Wilmington, New Hanover's County Seat, developed into a coastal trading port for the colonies. However, with the introduction of the railroads, transportation by land became easier than traffic in the coastal flats and the shallow river around Wilmington. New Hanover grew into a bustling trading center, with its population reaching 7,000 by 1790 and 22,000 by 1860.

New Hanover County was greatly impacted by the Civil War. Slaves made up half of the County's population before the War. Wilmington, the County Seat, was considered a Confederate stronghold and became a strategic focal point for both sides. New Hanover was the site of some of the final battles in the Civil War, including the Second Battle of Fort Fisher and the Battle of Wilmington. The County was also the site of the Wilmington Insurrection of 1898 and the introduction of the Jim Crow laws.

After the Civil War, New Hanover was demilitarized and the economy refocused on agriculture and port industries, including shipbuilding. In the late 1900s, New Hanover served as the setting for several television series and movies. The tourism associated with filmmaking has led to the naming of Wilmington, the "Hollywood of the East." Today, retail, tourism, light manufacturing, health care, education, and filmmaking are some of the key industries in New Hanover.

New Hanover County hosts several annual events, including the Cape Fear Marlin Tournament at Wrightsville Beach, Old Wilmington by Candlelight, Countdown on Cape Fear, and North Carolina Azalea Festival, which draws over 300,000 tourists each year (Martin, 2011; McGeachy, 2009).

5. Coastal Amenities

New Hanover County has 31 miles of shoreline, with nearly 100 beach access points on three public beaches, 13 marinas, and 11 yacht clubs (North Carolina Visitors Network, 2012; U.S. Census Bureau, 2009). There are no national parks in the County, although there are two state parks and one state reserve. The Masonboro Island Coastal Reserve is located on Masonboro Island, the largest undisturbed barrier island in southern North Carolina. Most of the island (87 percent) is marsh and tidal flat. It is only accessible by boat (Google, Inc., 2012; N.C. Division of Parks and Recreation, 2012; The North Carolina Coastal Reserve & National Estuarine Research Reserve, 2007).

New Hanover County has several historically significant landmarks, including Fort Fisher State Historic Site and the U.S.S. North Carolina memorial at Wilmington (Martin, 2011).

6. General Economic Situation

The U.S. Census Bureau lists 6,736 business establishments in New Hanover County in 2009 (U.S. Bureau of Statistics, 2009). The largest employers in the County are: the New Hanover Regional Medical Center, the New Hanover County School System, and the University of North Carolina, all of which employ over 1,000 people (North Carolina Department of Commerce, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in New Hanover County centers on its sandy, uncrowded beaches. Carolina Beach, Kure Beach, and Wrightsville Beach ranked as some of the County's top tourist attractions. New Hanover's beaches are ideal for sunbathing and collecting shells. Tourists who enjoy water sports can surf and fish: charter boats are available for deep-sea fishing. For those who enjoy more a developed environment, New Hanover offers a boardwalk, piers, an amusement park, and numerous art galleries and shops. The County website describes its "relaxed atmosphere, scenic beaches, charming downtown and rich culture and history."

Tourists can also enjoy the historic port town, with its preserved architecture and its carriage tours. They can also visit the U.S.S. North Carolina, a restored World War II memorial, and North Carolina's oldest history museum (North Carolina Visitors Network, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 92.0 percent of the ocean-related jobs in New Hanover County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$400.88 million in New Hanover County, generating \$91.62 million in payroll income and supporting 5,040 jobs (North Carolina Department of Commerce, 2010). There are 752 establishments dedicated to leisure and hospitality in New Hanover County; the average weekly wage for employees of these establishments is \$277. Leisure and hospitality employment in New Hanover County increased by 2,366 jobs, or 18.34 percent, from winter to summer in 2010, reflecting the somewhat seasonal nature of the industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 65.3 percent of ocean recreation and tourism-related businesses in New Hanover County are small (U.S. Bureau of Statistics, 2009).²

In 2009, 464 ocean-related establishments directly employed 9,603 people in New Hanover County. These numbers reflected an increase from 2000, when 418 establishments employed 8,182 people. From 2000 to 2009, the number of ocean-related establishments grew by 11.0 percent and the employment associated with these establishments grew by 17.4 percent (National Ocean Economics Program, 2012).

There are 66 hotels, eight bed and breakfasts, and three campgrounds in the County (Coastal Travel Guide, 2012; U.S. Bureau of Statistics, 2009). In 2011, visitor accommodations grossed \$3,630,298 in lodging tax revenue, which includes taxes on campgrounds (New Hanover County Finance Department, 2011). Approximately 6.6 percent of the housing units in New Hanover County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry. The U.S. Bureau of Labor Statistics data reflect the seasonal nature of the industry.

Exhibit 5. New Hanover County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	0	0	0	-100.0%
Boat Building and Repair (336612)	13	12	10	-**
Boat Dealers (441222)	81	88	81	-60.3%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	1,291	1,765	1,559	14.5%
Restaurant Employment (7221 & 7222)	9,554	11,040	10,362	2.5%
Amusement, Gambling, Other Recreation (713)	1,166	1,567	1,350	-9.0%
General Tourism				
Travel Agencies (561510)	13	13	13	-43.5%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

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Onslow County, North Carolina

1. Synopsis

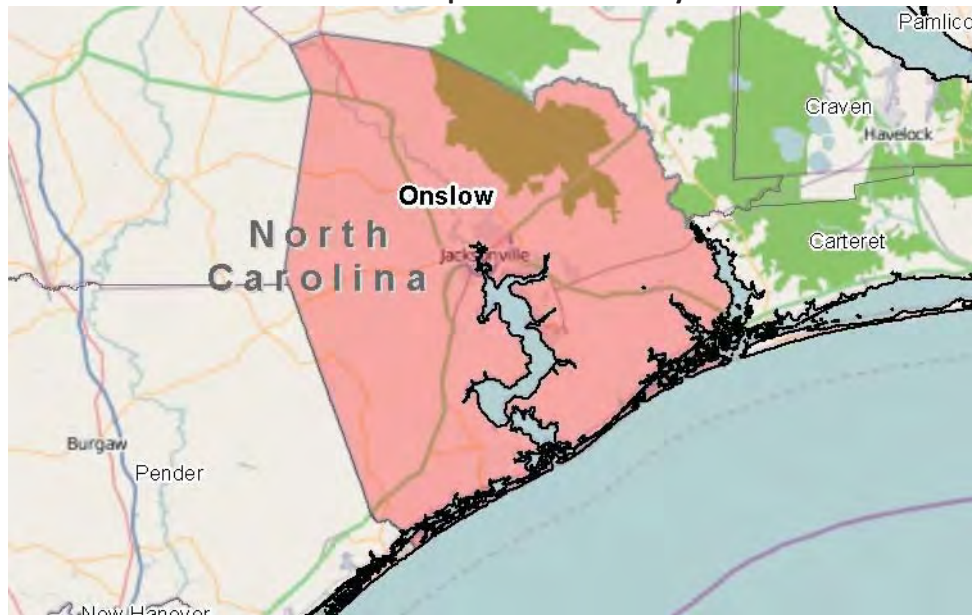
Onslow County is located on the Atlantic coast of North Carolina. The County is known for its abundant wildlife and undeveloped landscapes; it is also known for being the site of the Camp Lejeune Marine Corps Base. Onslow is comprised of five townships. Almost 178,000 people reside in Onslow County, with most of the population surrounding the City of Jacksonville. Onslow has a population density of 233 people per square mile and a housing density of 89 units per square mile (U.S. Census Bureau, 2010). Onslow’s economy depends on agriculture, commercial fishing, and tourism.

Tourism represents a significant portion of the ocean economy in Onslow County. In 2009, 250 ocean-related establishments directly employed 5,360 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 96.8 percent of the ocean-related jobs in Onslow County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately half—54.4 percent—of ocean recreation and tourism-related businesses in Onslow County are small (U.S. Census Bureau, 2009).¹

2. Location

Onslow County, shown in Exhibit 1, is located on the southeastern Atlantic coast of North Carolina. It lies approximately 120 miles from Raleigh and 50 miles from Wilmington. Adjacent counties include Jones County (to the north), Carteret County (to the east), Pender County (to the southwest), and Duplin County (to the northwest) (Google, Inc., 2012). The County has 767 square miles of land and over 30 miles of shoreline along the Atlantic Ocean and New River (Onslow County, 2011b).

Exhibit 1. Map of Onslow County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Onslow County is accessible by car on U.S. Highways 17, 258, and 24 (Google, Inc., 2012). Tourists can travel by air to Onslow through the Albert J. Ellis Airport, served by two commercial airlines (Onslow County, 2011a).

3. Demographics

Onslow County has a year-round population of 177,772 (U.S. Census Bureau, 2010). The following three tables profile Onslow County’s population. As Exhibit 2 shows, the demographics of Onslow County generally mirror those of the State. The population of Onslow County grew by 18.2 percent over the past decade, which matches the populations of the North Carolina, at 18.5 percent.

Exhibit 2. Population Profile

	Onslow	North Carolina
Year-Round Population	177,772	8,049,313
Population Change (2000-2010)	18.2%	18.5%
Median Age (Years)	25.7	37.4
Percent Female	46.4%	51.3%
Percent Foreign Born	4.6%	7.4%
<i>Ethnic Profile</i>		
White	74.0%	68.5%
Black/African American	15.6%	21.5%
Asian	1.9%	2.2%
Hispanic/Latino	10.1%	8.4%
American Indian	0.7%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Onslow	North Carolina
Unemployment Rate	9.4%	8.8%
Percent Out of Labor Force	28.0%	35.1%
Median Household Income	\$43,561	\$45,570
Percent of Pop. Below Poverty Line	13.8%	15.5%
<i>Educational Attainment</i>		
High School Diploma	30.7%	27.5%
Bachelor's Degree	12.5%	17.6%
Graduate/Professional Degree	5.2%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Onslow	North Carolina
Population Density (people/sq. mile)	233.1	196.1
Housing Density (structures/sq. mile)	89.4	87.0
Housing Structures that are Independent Units	57.8%	65.1%
Occupied Units	88.1%	86.5%
Properties for Seasonal, Rec. or Occasional Use	5.7%	4.4%
Median House Value	\$137,400	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Onslow's first European settlers, three Englishmen, arrived in 1705. They were joined by a French settler in 1711. In the following 18 years, 35 more families settled in the area. The County was formed in 1734 and named in honor of Sir Arthur Onslow, Speaker of the British House of Commons.

Prior to settlement by Europeans, Southeastern North Carolina was inhabited by the Tuscarora tribe. Most of the Tuscarora people left the area following the Tuscarora War of 1711.

In the 1700s and 1800s, Onslow County consisted of a group of agricultural and maritime communities. Settlers took advantage of the abundance of pine and produced lumber and turpentine, encouraging the development of a shipbuilding industry. After the Civil War, the lumber industry remained strong. Today, the 78,000-acre Hoffman Forest is an impressive feature of Onslow's natural landscape.

The recreation industry began to contribute to the local economy in the years between World Wars I and II. Many gun clubs were established in Onslow, attracting tourists from out of state. However, after World War II, the recreation industry declined. It was replaced by the introduction of several military bases. Camp Davis Army Training Base at Holly Ridge and Camp Lejeune Marine Corps Base were established in the 1940s. Camp Davis at Holly Ridge has since closed, but Camp Lejeune covers one third of the County's acreage and houses over 43,000 marines and sailors.

Today, Onslow County remains an agricultural producer, with tobacco, corn, soybeans, and poultry among its major crops. Commercial fishing and tourism also contribute to the local economy (Martin, 2011; Onslow County, 2011; Onslow County, North Carolina, 2009).

Onslow County hosts several annual events. They include: the Heritage Day in Richlands, Annual Sneads Ferry Memorial Day Parade, Camp Lejeune Fireworks Display, Sneads Ferry Shrimp Festival, Kuumba Festival, and Friendly City by the Sea Speckled Trout Tournament (Onslow County Tourism, 2009).

5. Coastal Amenities

Onslow County has over 30 miles of river and ocean beaches (Onslow County, 2011b). The County is largely rural. There are eight public beaches, three marinas, and six yacht clubs in Onslow (Coastal Travel Guide, 2012; Onslow County Tourism, 2009; U.S. Census Bureau, 2009). There are no natural parks or wildlife refuges and no federally protected lands. However, the Hofmann Forest, owned by the North Carolina State University, protects about 78,000 acres of land (Google, Inc., 2012; NC State University, 2012). The Hammocks Beach State Park is also a protected site and serves as a sea turtle nesting area (North Carolina Visitors Network, 2012; Onslow County Tourism, 2009).

6. General Economic Situation

The U.S. Census Bureau lists 2,639 business establishments in Onslow County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the U.S. Department of Defense and the Onslow County Board Of Education, both of which employ over 1,000 people (North Carolina Department of Commerce, 2011).

7. Coastal Tourism/Recreation Activity

Onslow County is ideal for people who enjoy nature-oriented tourism. The Onslow County Government cites its "scenic terrain, shoreline, and seascape." Recreational activities in Onslow include biking,

camping, fishing, golfing, horseback riding, crab hunting, and boating. Charters are available for dolphin watching and off-shore fishing.

For those interested in military history, Onslow offers the Montford Point Marines Museum, the Onslow Vietnam Veterans Memorial, and the Beirut Memorial (Onslow County Tourism, 2009).

According to the National Oceanic and Atmospheric Administration, an estimated 96.8 percent of the ocean-related jobs in Onslow County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$180.30 million in Onslow County, generating \$33.79 million in payroll income and supporting 1,640 jobs (North Carolina Department of Commerce, 2010). There are 363 establishments dedicated to leisure and hospitality in Onslow County; the average weekly wage for employees of these establishments is \$268. Leisure and hospitality employment in Onslow County increased by 584 jobs, or 8.63 percent, from winter to summer in 2010, indicating that employment in the tourism industry is relatively steady throughout the year (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 54.4 percent of ocean recreation and tourism-related businesses in Onslow County are small (U.S. Census Bureau, 2009).²

In 2009, 250 ocean-related establishments directly employed 5,360 people in Onslow County. These numbers reflected an increase from 2000, when 235 establishments employed 4,359 people. From 2000 to 2009, the number of ocean-related establishments grew by a modest 6.4 percent and the employment associated with these establishments grew by 23.0 percent (National Ocean Economics Program, 2012).

There are 27 hotels, two bed and breakfasts, and five campgrounds in the County (Onslow County Tourism, 2009; U.S. Census Bureau, 2009). In 2010, occupancy taxes, privilege license, and register of deeds stamps grossed \$ 1,686,760 (Onslow County Board of Commissioners, 2011). Approximately 5.7 percent of the housing units in Onslow County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry. The industries associated with marinas and boat dealers also provide employment.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Onslow County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	- [^]
Marinas (713930)	11	19	17	- ^{**}
Boat Building and Repair (336612)	-	-	-	- [^]
Boat Dealers (441222)	17	0	18	-21.7%
Renting Pleasure Boats (532292)	-	-	-	- [^]
Land-Based				
Hotel Employment (72111)	0	0	0	0%
Restaurant Employment (7221 & 7222)	5,377	5,764	5,583	13.4%
Amusement, Gambling, Other Recreation (713)	300	299	301	- ^{**}
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

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Pender County, North Carolina

1. Synopsis

Pender County is located on the southeastern Atlantic coast of North Carolina. The County is known for its colonial and military history. Pender is comprised of 10 townships, with seven cities and towns and a collection of unincorporated communities. About 52,000 people reside in Pender County, making it much less densely populated than the state as a whole (U.S. Census Bureau, 2010). Pender’s economy depends on clothing manufacturing and agriculture.

Tourism represents a significant portion of the ocean economy in Pender County. In 2009, 55 ocean-related establishments directly employed 534 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 94.8 percent of the ocean-related jobs in Pender County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Almost all—92.3 percent—of the ocean recreation and tourism-related businesses in Pender County are small (U.S. Census Bureau, 2009).¹

2. Location

Pender County, shown in Exhibit 1, is located on the southeastern Atlantic coast of North Carolina. It lies less than 30 miles from Wilmington in New Hanover County. Adjacent counties include Duplin County (to the north), Onslow County (to the northeast), New Hanover County (to the south), Brunswick County (to the south-southwest), Columbus County (to the southwest), Bladen County (to the west), and Sampson County (to the northwest) (Google, Inc., 2012). The County has 867 square miles of land and about 15 miles of shoreline along the Atlantic Ocean (Pender County, North Carolina, 2009; U.S. Census Bureau, 2010).

Exhibit 1. Map of Pender County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Pender County is accessible by car on Interstate 40, U.S. Route 17, and North Carolina Route 132. For visitors traveling by air, the nearest airport is Wilmington International Airport in neighboring New Hanover County. The North Carolina Ports Authority, for water transport, is also in Wilmington, New Hanover, about 30 miles from Pender County (Google, Inc., 2012; Pender County, North Carolina, 2009).

3. Demographics

Pender County has a year-round population of 52,217 (U.S. Census Bureau, 2010). The following three tables profile Pender County’s population. As Exhibit 2 shows, at 27.1 percent, the population growth in Pender County has outpaced State population growth (18.5 percent) in the past decade.

Exhibit 2. Population Profile

	Pender	North Carolina
Year-Round Population	52,217	8,049,313
Population Change (2000-2010)	27.1%	18.5%
Median Age (Years)	41.1	37.4
Percent Female	50.0%	51.3%
Percent Foreign Born	4.4%	7.4%
<i>Ethnic Profile</i>		
White	76.1%	68.5%
Black/African American	17.8%	21.5%
Asian	0.4%	2.2%
Hispanic/Latino	6.1%	8.4%
American Indian	0.6%	1.3%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Pender	North Carolina
Unemployment Rate	7.9%	8.8%
Percent Out of Labor Force	40.1%	35.1%
Median Household Income	\$44,338	\$45,570
Percent of Pop. Below Poverty Line	14.8%	15.5%
<i>Educational Attainment</i>		
High School Diploma	35.7%	27.5%
Bachelor's Degree	12.6%	17.6%
Graduate/Professional Degree	5.2%	8.7%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Pender	North Carolina
Population Density (people/sq. mile)	60.0	196.1
Housing Density (structures/sq. mile)	30.7	87.0
Housing Structures that are Independent Units	62.9%	65.1%
Occupied Units	76.1%	86.5%
Properties for Seasonal, Rec. or Occasional Use	14.1%	4.4%
Median House Value	\$147,200	\$154,500

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to European settlement, the area of present-day Pender County was inhabited by the Burgaw tribe. English, Welsh, and German immigrants settled in the area in the 1600s. Over time, a plantation economy developed in the area.

Present-day Pender was the site of significant action in the American Revolution. The first Revolutionary War battle in North Carolina took place at Moore's Creek Bridge in February 1776. Although it only lasted for three minutes, this battle was considered an important Patriot victory, earning the title, "the Lexington and Concord of the South." Historians suggest that the Battle of Moore's Creek Bridge led to the end of British authority in North Carolina.

Pender County was officially founded in 1875, formed from a portion of New Hanover County. The County was named after William D. Pender, the youngest Confederate general that died at the Battle of Gettysburg.

During the Great Depression, Pender County was the site of an experimental planned community, called the Penderlea Homesteads. The Federal Government acquired the community under the New Deal and many of the homesteaders left the area, but the structures remain as historical landmarks in Pender.

After World War II, the U.S. Navy selected Pender as a test region for rocket development. The Kellet Corporation and John Hopkins University tested rockets and missiles on Topsail Island. These tests provided a foundation for the U.S. NASA program. Today, Pender's economy depends on clothes manufacturing and agriculture. Blueberries, strawberries, tobacco, soybeans, and livestock rank among Pender's key crops (Martin, 2011; Pender County, North Carolina, 2009; Pender County Tourism, 2012).

Several annual events take place in Pender County, including the Pender County Spring Festival, North Carolina Blueberry Festival, North Carolina Spot Festival, Dolphin Dip, and Battle of Moores Creek Anniversary event (Pender County Tourism, 2012). The sea turtle releases are also regular events. Two or three times a year, volunteers return sea turtles to the ocean after the animals have recovered from injury and illness at Pender's "Turtle Hospital." Hundreds of spectators gather to watch the event (Pender County Government, 2012).

5. Coastal Amenities

Pender County has about 15 miles of shoreline along the Atlantic Ocean (Pender County, North Carolina, 2009). There are two public beaches, two marinas, and three yacht clubs in the County (U.S. Census Bureau, 2009). Pender County has one national park, the Moores Creek National Battlefield (88 acres). There are also over 70,000 acres of state-owned protected land in a preserve called the Holly Shelter Game Land (Pender County Tourism, 2012).

Pender has several distinctive coastal features, including the Cape Fear River, Topsail Island, and Roan Island. These islands are popular tourist destinations (Martin, 2011).

6. General Economic Situation

The U.S. Census Bureau lists 900 business establishments in Pender County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: Pender County Board Of Education, Pender County Government, and the North Carolina State Department of Correction. As the largest employer, the Pender County Board of Education employs over 1,000 people (North Carolina Department of Commerce, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Pender County involves outdoor recreation both on the coast and inland, as well as historical sightseeing. Visitors to Pender's coast can swim, fish, dive, walk the piers, and enjoy the local seafood. Charters are available for tourists who wish to explore the waters. Inland activities include hunting, kayaking, camping, horseback riding, and visiting local farms and vineyards.

Tourists interested in the region's history can visit the Missiles and More Museum, Moores Creek National Battlefield, and Penderlea Homestead Museum (Pender County Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 94.8 percent of the ocean-related jobs in Pender County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$72.83 million in Pender County, generating \$12.31 million in payroll income and supporting 710 jobs (North Carolina Department of Commerce, 2010). There are 91 establishments dedicated to leisure and hospitality in Pender County; the average weekly wage for employees of these establishments is \$265. Leisure and hospitality employment in Pender County increased by 481 jobs, or 69.41 percent, from winter to summer in 2010, reflecting the seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 92.3 percent of ocean recreation and tourism-related businesses in Pender County are small (U.S. Census Bureau, 2009).²

In 2009, 55 ocean-related establishments directly employed 534 people in Pender County. These numbers reflected a change from 2000, when 61 establishments employed 435 people. From 2000 to 2009, the number of ocean-related establishments decreased by 9.8 percent and the number of people employed by these establishments grew by 22.8 percent (National Ocean Economics Program, 2012).

There are 10 hotels, three bed and breakfasts, and six campgrounds in the County (Pender County Tourism, 2012). The North Carolina Department of State Treasurer reports no occupancy tax revenue for years 2008 to 2011 (North Carolina Department of State Treasurer, 2012). Approximately 14.1 percent of the housing units in Pender County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry and the hotel industry. Summer employment in these industries is roughly double that of winter employment, indicating the importance of seasonal visitors.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Pender County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	^
Marinas (713930)	0	3	0	0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	-	-	-	^
Renting Pleasure Boats (532292)	-	-	-	^
Land-Based				
Hotel Employment (72111)	35	100	68	- **
Restaurant Employment (7221 & 7222)	490	841	691	-6.6%
Amusement, Gambling, Other Recreation (713)	70	133	111	-19.6%
General Tourism				
Travel Agencies (561510)	-	-	-	^
Tour Operators (561520)	-	-	-	^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

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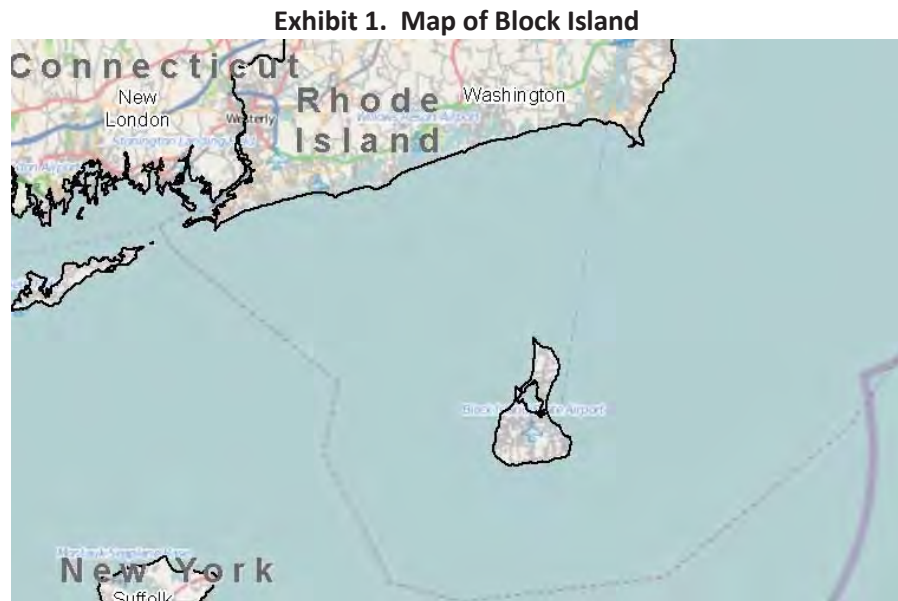
Block Island, Rhode Island

1. Synopsis

Block Island, Rhode Island is the more common name of the town of New Shoreham. It is an island with a very low population density, and is almost entirely surrounded by sandy, undeveloped beach. The island's year-round population is 1,051, but swells in summer months with the influx of tourists; the majority of tourism to the island is day-trips only, although some choose to stay for longer periods (U.S. Census Bureau, 2010a). 100 percent of all ocean recreation and tourism establishments on the island are small (U.S. Census Bureau, 2009).¹ Summer tourism is highly important to the Block Island economy.

2. Location

Block Island, shown in Exhibit 1, is an island approximately 13 miles offshore the southern coast of Rhode Island, and just slightly further east from the tip of the Long Island peninsula. The island has a total area of only 9.7 square miles (U.S. Census Bureau, 2010a).



Source: ESRI, 2011 and OpenStreetMap, 2011.

There are no bridges to Block Island; it is only accessible by ferry and air. The Block Island airport has daily commercial flights to and from Westerly (Washington County) on New England Airlines. The ferry terminal at the New Shoreham waterfront can be reached from New London, CT, Montauk on Long Island, NY, Newport, RI, and Point Judith, RI (Washington County). Cars are permitted on the island via ferry (American Public Transportation Association, 2012).

3. Demographics

Block Island has a year-round population of 1,051 (U.S. Census Bureau, 2010a). The following three tables profile Block Island's population and demographics compared to the rest of the state. As Exhibit 2 shows, Block Island has predominantly seasonal extremely high-priced homes.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 2. Population Profile

	Block Island	Rhode Island
Year-Round Population	1,051	1,052,567
Population Change (2000-2010)	4.06%	0.41%
Median Age (years)	50.2	49.6
Percent Female	48.8%	51.7%
Percent Foreign Born	3.9%	12.6%
<i>Ethnic Profile</i>		
White	96.7%	81.4%
Black/African American	0.7%	5.7%
Asian	0.5%	2.9%
Hispanic/Latino	2.9%	12.4%
American Indian	0.1%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Block Island	Rhode Island
Unemployment Rate	2.5%	10.9%
Percent Out of Labor Force	23.7%	35.4%
Median Household Income	\$75,417	\$52,254
Percent of Population Below Poverty Line	11.2%	14.0%
<i>Educational Attainment</i>		
High School Diploma	19.9%	27.2%
Bachelor's Degree	37.5%	18.1%
Graduate/Professional Degree	10.9%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Block Island	Rhode Island
Population Density (people/sq. mile)	108.0	1,018.1
Housing Density (structures/sq. mile)	172.9	448.2
Housing Structures that Are Independent Units	88.5%	59.5%
Occupied Units	26.4%	86.8%
Properties for Seasonal, Rec. or Occasional Use	69.3%	3.7%
Median House Value	\$1,000,000+	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Niantic Native American Tribe, which eventually merged with the nearby Narragansett Tribe, lived on Block Island as early as 1300 BC. In 1662, the tribe's population numbered around 1,200, but by 1774, it has diminished to about 50. In the face of war with neighboring tribes and pressure from Europeans, the tribe eventually left the area (Block Island Tourism Council, 2012).

Block Island was chartered by the Dutch explorer Adrian Block, who named the island for himself. The English colonists did not arrive to the Island until 1661, when the land was considered part of the Massachusetts Bay Colony. The Island was occupied during parts of the War of 1812 by the British Navy

as a haven for several of the fleet's ships. In 1972, the Block Island Conservancy was founded, and has aimed to preserve the island natural beauty, the Old Harbor District, and the wildlife areas, which are the Island's main draws (Block Island Tourism Council, 2012).

Block Island's most popular tourist draws is Block Island Race Week, a competitive week-long sailing event. Some of Block Island's other events include the Block Island Music Festival, the 15K Run Around the Block, and the Lion's Club Clam Bake. The Music Festival is a week-long event, free of charge, the features new "undiscovered" musical talent; the 15K Run Around the Block is an annual race, which will run its 37th race in 2012, around the streets of the island. The Clam Bake is slated to host its 15th annual event in September of 2012 (Block Island Tourism Council, 2012).

5. Coastal Amenities

Block Island's coastline is almost entirely undeveloped sand beach. There are very few businesses outside of the New Shoreham waterfront district, and there are only 172 housing structures per square mile. Block Island is, therefore, quiet, remote, and ideal for sunbathing, walking, and beachcombing. On the Island, there are 10 public beaches, two harbors, and two marinas, but no yacht clubs. The Block Island National Wildlife Refuge protects 127 acres of the Island, or approximately 43 percent of the entire island (U.S. National Park Service, 2012).

Visitors to Block Island are, in almost all cases, there to enjoy the beach only. However, the Island has several art galleries, and over 50 small gift, jewelry, and clothing shops, and restaurants along the New Shoreham waterfront. The Island's two lighthouses are less attractions than they are picturesque additions to the scenic, secluded vistas throughout the Island.

6. General Economic Situation

The Bureau of Labor Statistics listed only 179 business establishments in Block Island in 2010 (U.S. Bureau of Labor Statistics, 2010). The two largest employers are the Town of New Shoreham and the 1661 Inn & Hotel. Both the town of New Shoreham and the 1661 Inn & Hotel employ approximately 100 workers (Rhode Island Economic Development Corporation, 2011).

7. Coastal Tourism/Recreation Activity

The Block Island landscape creates ideal beach conditions: sea grass-covered dunes, continuous stretches of sandy beaches, and wooded lands separating the beaches from development. Beach activities include swimming, surfing, snorkeling, and parasailing, whereas kayaking is common both along the beaches and through the tidal zones. On-shore activities include hiking, horseback riding, and bicycling through some of the 32 miles of hiking trails in the wooded and sandy areas and high atop the 250-foot-high coastal cliffs. As 43 percent of the Island is protected wildlife refuge, wildlife viewing is another major attraction to the Island. Fishing, sailing, and boating are popular activities encouraged by several equipment rental locations in New Shoreham (Block Island Tourism Council, 2012).

Direct and indirect tourism expenditures in 2010 were worth over \$259 million. Direct and indirect employment from the tourism industry was estimated to be 2,159. 58 of the 179 establishments on the Island are dedicated to leisure and hospitality alone (Rhode Island Economic Development Corporation, 2011). U.S. Census data states that 100 percent of all ocean recreation and tourism establishments in Block Island are small (U.S. Census Bureau, 2009).²

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

There are 17 hotels and bed and breakfasts, and no campgrounds on the Island (U.S. Census Bureau, 2009). An additional 69 percent of all houses in Block Island are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

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Bristol County, Rhode Island

1. Synopsis

Bristol County, Rhode Island is one of the northern-most counties in Narragansett Bay. Views along Bristol County's shoreline include some of the Bay's islands, coves, and peninsulas, but the "open" Atlantic Ocean can only be seen from high atop hilltops. The County's population and housing densities are roughly twice those of the average in the state, but the County but is not considered dense. The largest city is Bristol, with a population of 22,954. The County's population is only 49,875 people (U.S. Census Bureau, 2010a).

Tourism represents a small to medium percentage of the ocean economy in Bristol. According to the National Oceanic and Atmospheric Administration, 71 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 65 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009). In 2009, 160 ocean-related establishments directly employed 2,145 people in the County (National Ocean Economics Program, 2012).

2. Location

Bristol County, shown in Exhibit 1, is along the northeast shores of Narragansett Bay. The County has a total area of only 45 square miles, making it the smallest by area in the state of Rhode Island (U.S. Census Bureau, 2010a). Bristol County is just 15 miles to the southeast of Providence, and approximately 60 miles south of Boston, Massachusetts (Google, Inc., 2012). Bristol County is bordered by Massachusetts to the east and north, Newport County to the south, and Providence and Kent Counties to the west.

Exhibit 1. Map of Bristol County



Source: ESRI, 2011 and OpenStreetMap, 2011.

There are no major highways within the County, although Interstate 195, which connects Providence to Cape Cod, Massachusetts, runs close to the County's northeast border, and U.S. Route 24 is just south of the City of Bristol across the Mount Hope Bridge (Google, Inc., 2012). There are no ferries, railroads, or airports in Bristol County. However, the T.F. Green Memorial State Airport and the Providence Railroad Station (which is served by Amtrak's Northeast Regional Line and the Massachusetts Bay Transportation

Authority's Commuter Rail to Boston) are in neighboring Providence County (Amtrak, Inc., 2012; American Public Transportation Association, 2012; Massachusetts Bay Transportation Authority, 2012).

3. Demographics

Bristol County has a year-round population of 49,875 (U.S. Census Bureau, 2010a). The following three tables profile Bristol County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Bristol County's population has decreased in the last ten years, whereas the state of Rhode Island's population has remained unchanged.

Exhibit 2. Population Profile

	Bristol	Rhode Island
Year-Round Population	49,875	1,052,567
Population Change (2000-2010)	-1.53%	0.41%
Median Age (years)	42.9	49.6
Percent Female	52.0%	51.7%
Percent Foreign Born	8.5%	12.6%
<i>Ethnic Profile</i>		
White	95.7%	81.4%
Black/African American	0.8%	5.7%
Asian	1.4%	2.9%
Hispanic/Latino	2.0%	12.4%
American Indian	0.2%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Bristol	Rhode Island
Unemployment Rate	7.5%	10.9%
Percent Out of Labor Force	33.3%	35.4%
Median Household Income	\$68,014	\$52,254
Percent of Population Below Poverty Line	7.8%	14.0%
<i>Educational Attainment</i>		
High School Diploma	23.0%	27.2%
Bachelor's Degree	23.7%	18.1%
Graduate/Professional Degree	16.9%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Bristol	Rhode Island
Population Density (people/sq. mile)	2,064	1,018.1
Housing Density (structures/sq. mile)	863	448.2
Housing Structures that Are Independent Units	70.2%	59.5%
Occupied Units	91.8%	86.8%
Properties for Seasonal, Rec. or Occasional Use	2.6%	3.7%
Median House Value	\$363,100	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Wampanoag people were the original inhabitants of the area, and had lived in southeastern Massachusetts and Rhode Island for thousands of years prior to the arrival of European colonists. Between 1675 and 1676, it is estimated that approximately 40 percent of their population was killed by English settlers during the King Phillip's War. The first battle of King Philip's War was fought in the City of Bristol in 1675. Since that arrival of the colonists, the Wampanoag people have progressively decreased in population; only five tribes remain in eastern Massachusetts and Maine (Sultzman, 2011; Town of Bristol, 2012).

Bristol County was first settled in the late 1600's, after the King Philip's War. Early industry centered around trade, with the Narragansett Bay providing a strong center for regional trade. In the 19th century, Bristol County grew as a major manufacturing center of northeast, including textiles, bricks, and ships. The manufacturing industry was helped by a local, readily-available labor force, supported by waves of Portuguese and Italian immigrants. More recently, Bristol County has become a suburban community for employees working in nearby Providence, and has increasingly attracted an affluent population. Major industries in the County still include boat building, manufacturing, and tourism. Prominent ethnic communities in Bristol County have remained since the 19th century, including those of Portuguese and Italian descent (Town of Bristol, 2012).

The Warren Quahog Festival, slated for its 29th annual event in 2012, showcases a variety of fresh-cooked seafood, chowders, clam cakes, and of course, stuffed quahogs. Arts and crafts vendors and live musical entertainment are also draws to the festival. Bristol County is also known to have the country's oldest Fourth of July Celebration; 2012 will mark the County's 227th annual event (Discover Newport; 2012).

5. Coastal Amenities

Bristol County has approximately 35 miles of coastline along the inner portion of Narragansett Bay (Allard Cox, M. (ed.), 2004). Bristol County's coastline is mostly private, much of which is wooded or rocky. Bristol County is an attractive boat haven because of the protection afforded by the Narragansett Bay; waters within the Bay are generally calm. The County has four public beaches, four marinas, and only one yacht club and one harbor, though several coves exist along the shoreline (Visit Rhode Island, 2012). There are no national parks, no national wildlife refuges, and consequently there is no federally-protected land in the County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012). However, the County has several state and local parks that honor the early entrepreneurs (via their mansions or former properties that have become grasslands and museums), or that commemorate the early maritime and Revolutionary War history by the County's waterfront parks.

The Herreshoff Marine Museum is one of the County's most popular tourist draws. The museum is dedicated to the history of the Herreshoff Manufacturing Company, yachting, and the America's Cup race. The Herreshoff Manufacturing Company produced eight America's Cup winners. Today, the museum is on the former company's grounds and has a collection of over 60 boats. The Bristol Waterfront, listed on the National Register of Historic Places, is a small town center with Victorian architecture and small shops. The 464-acre Colt State Park attracts nature enthusiasts, where many enjoy picnics, bike rides, and walks through the rocky beaches and wooded areas (Rhode Island Department of Environmental Management Parks and Recreations Division, 2009).

6. General Economic Situation

The Bureau of Labor Statistics listed 1,249 business establishments in Bristol County in 2010 (U.S. Bureau of Labor Statistics, 2010). The largest employer in the County is Roger Williams University, which employed over 1,450 people in 2010 (Rhode Island Economic Development Corporation, 2011). In recent years, Bristol has maintained a lower unemployment rate than both the state of Rhode Island and the country as a whole. Bristol County remains a more affluent area than the state of Rhode Island, though less so than neighboring Newport County (U.S. Census Bureau, 2010a).

7. Coastal Tourism/Recreation Activity

Bristol County's coastline is mostly situated in private, residential areas. While small pockets of sandy beaches exist, the majority of the coastline is comprised of wooded or rocky shore. There are four public beaches in the County; the most well-known and visited is Barrington Town Beach, a four acre stretch of sandy beach that is suitable for walking, swimming, and sunbathing. The overwhelming majority of the coastline, however, cannot serve similar purposes. Boating, kayaking, and sailing are very popular maritime activities in the region due to the calm waters in the Narragansett Bay.

According to the National Oceanic and Atmospheric Administration, 71 percent of all ocean-related jobs in Bristol are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 159 establishments dedicated to leisure and hospitality alone in Bristol County; the average weekly wage for employees of these establishments is \$300. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Bristol County increased by only 454 jobs, though this increase represents a 28 percent change (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that only 65 percent of the ocean, recreation, and tourism establishments in Bristol County are small (U.S. Census Bureau, 2009).¹

In 2009, 160 ocean-related establishments directly employed 2,145 people. Between 2000 and 2009, the number of establishments rose 23.1 percent over the 130 establishments listed in 2000. The number of people directly employed in the ocean economy, however, decreased 3.7 percent from 2000, when there were 2,228 direct jobs (National Ocean Economics Program, 2012).

U.S. Census data from 2009 lists only one hotel in the County, and no bed and breakfasts or campgrounds. Additionally, 2.6 percent of all houses in Bristol County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, data from the U.S. Bureau of Labor Statistics were limited. Trends for available employment data suggest that marinas in the County have increased (possibly in size or in numbers of marinas) in the last five years, whereas restaurant employment has decreased or remained the same.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Bristol County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	55	113	83	33.9%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	0	0	0	-100% [#]
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	0	0	0	0
Restaurant Employment (7221 & 7222)	1,239	1,435	1,334	-1.2%
Amusement, Gambling, Other Recreation (713)	0	0	0	0
General Tourism				
Travel Agencies (561510)	-	-	-	-
Tour Operators (561520)	-	-	-	-
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Tour Bus, Scenic and Sightseeing, Operation was listed as 65 in 2005.

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Kent County, Rhode Island

1. Synopsis

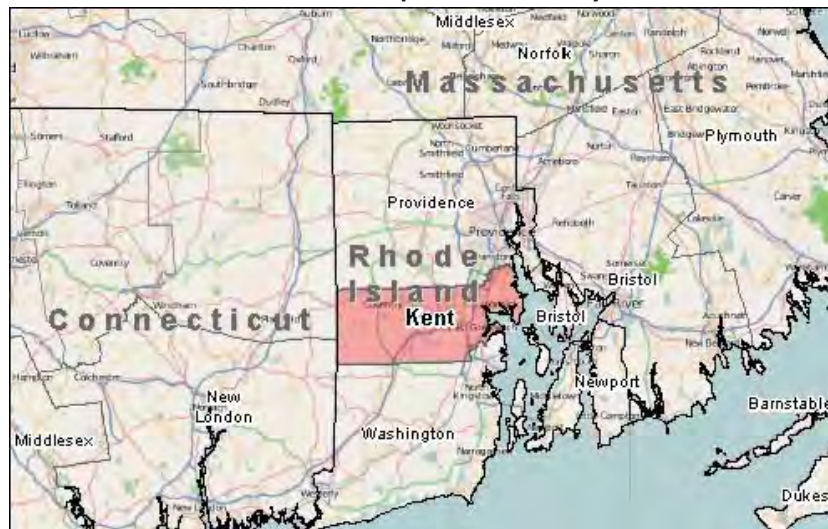
Kent County, Rhode Island is located along Narragansett Bay, however it has minimal shoreline. The County has only five municipalities, the largest being Warwick with a population of 86,672. Warwick is the second largest city in Rhode Island, behind the capital of Providence in neighboring Providence County, and comprises almost Kent County's entire coastline. Warwick County's population density roughly mirrors that of the state, at 986 people per square mile. The County's population is 166,158 people (U.S. Census Bureau, 2010a).

Tourism is an important source of the ocean economy in Kent County, as it represents over 98 percent of the economic base of the ocean economy (National Oceanic and Atmospheric Administration, 2012). According to the U.S. Census Bureau, 54.6 percent of ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 317 ocean-related establishments and 5,595 ocean-related jobs in Kent County (National Ocean Economics Program, 2012).

2. Location

Kent County, shown in Exhibit 1, is on the western shores of the Narragansett Bay. The County has a total area of 188 square miles (U.S. Census Bureau, 2010a). Kent County is bordered by Washington County to the south, Providence County to the north, Bristol County to the east of the Narragansett Bay, and Connecticut to the west. The Atlantic Ocean outside of the Narragansett Bay is not visible from Kent County at sea level.

Exhibit 1. Map of Kent County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Interstates 295 and 95 run north - south through Kent County, and thus provide direct routes to Providence, Boston, and points south along the coast (Google, Inc., 2012). Within Kent County is T.F. Green Memorial State Airport. It is one of New England's largest and provides daily service to major U.S.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

cities as well as a few international locations (American Public Transportation Association, 2012). The Massachusetts Bay Transportation Authority has a commuter rail that ends at the T.F. Green Airport, and continues to Boston through Providence (Massachusetts Bay Transportation Authority, 2012). The nearest Amtrak Station is in Providence (Amtrak, Inc., 2012). There is one ferry from Kent County – the Seastreak Providence Airport to Martha’s Vineyard Ferry is a high-speed ferry direct to Martha’s Vineyard Island (Seastreak, LLC, 2012).

3. Demographics

Kent County has a year-round population of 166,158 (U.S. Census Bureau, 2010a). The following three tables profile Kent County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Kent County has seen its population decline minimally over the latest decade; in most other attributes, it mirrors the state as a whole.

Exhibit 2. Population Profile

	Kent	Rhode Island
Year-Round Population	166,158	1,052,567
Population Change (2000-2010)	-0.6%	0.41%
Median Age (years)	42.7	49.6
Percent Female	51.9%	51.7%
Percent Foreign Born	5.2%	12.6%
<i>Ethnic Profile</i>		
White	93.4%	81.4%
Black/African American	1.4%	5.7%
Asian	2.0%	2.9%
Hispanic/Latino	3.2%	12.4%
American Indian	0.3%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Kent	Rhode Island
Unemployment Rate	12.3%	10.9%
Percent Out of Labor Force	32.4%	35.4%
Median Household Income	\$53,954	\$52,254
Percent of Population Below Poverty Line	10.8%	14.0%
<i>Educational Attainment</i>		
High School Diploma	30.7%	27.2%
Bachelor’s Degree	17.2%	18.1%
Graduate/Professional Degree	10.1%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Kent	Rhode Island
Population Density (people/sq. mile)	985.9	1,018.1
Housing Density (structures/sq. mile)	437.3	448.2
Housing Structures that Are Independent Units	73.4%	59.5%
Occupied Units	93.1%	86.8%
Properties for Seasonal, Rec. or Occasional Use	1.2%	3.7%
Median House Value	\$246,600	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Land to the west of Narragansett Bay in Rhode Island was originally inhabited by the Narragansett Indian peoples of the Algonquin Tribe. Between 1616 and 1619, the diseases carried by European colonists killed thousands of Algonquians in New England but left the Narragansett population largely intact and helped them become one of the strongest tribes in the region. After defeats in a series of war, the remaining Narragansett people joined other neighboring tribes. Descendents of the tribe are part of the Narragansett Indian Tribe of Rhode Island in Charlestown, which regained federal recognition in 1983 (Rhode Island Sea Grant, 2012).

Part of the land that eventually would become Kent County was first purchased in 1642 by Samuel Gorton, an early English settler to the northeast. Kent County was a minor fishing and manufacturing community, but was dependent on nearby Providence for its economic base. Many of Kent County's residents lived – and many still do live – in Kent County but commute to Providence for employment (Warwick, Rhode Island Digital History Project, 2012).

5. Coastal Amenities

Kent County has approximately 45 miles of coastline, almost half of which is along Greenwich Bay. The coastline is mostly privately-owned, along smaller neighborhoods and golf courses. Much of the shore is comprised of narrow, pebble beaches or wooded shoreline. There are, however, a handful of sandy beaches in remote locations or otherwise made public as part of state or local parks. The County has six public beaches, no harbors (though there are several coves), 12 marinas, and four yacht clubs (Allard, 2004). There are no national parks or wildlife refuges in the County, though there are several coastal and landlocked parks and wildlife management areas (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Tourism attractions to Kent County vary in type. Three popular attractions include the New England Wireless and Steam Museum, the North-South Trail, and Warwick Light. The New England Wireless and Steam Museum is an electrical and mechanical engineering museum built in 1964 and the North-South Trail is a 77 mile-long hiking trail that runs the length of Rhode Island's coast. Warwick Light, listed on the National Register of Historic Places, is a lighthouse the City of Warwick that was originally built in 1826 (South County Tourism Council, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 4,292 business establishments in Kent County in 2010 (U.S. Bureau of Labor Statistics, 2010). The County's three largest employers (and number of employees) are: Kent County Memorial Hospital (1,850), Amgen Inc., (900), and Chelo's Restaurant (730) (Rhode Island Economic Development Corporation, 2011).

7. Coastal Tourism/Recreation Activity

Kent County's coastline has minimal acres of sandy beach. While these beaches are suitable for sunbathing, swimming, and beachcombing, they are often not the attraction that brings visitors to the area. The beaches are remote and offer very few amenities, if any at all. Kent's coastline is instead used for more scenic purposes – with views of the Narragansett Bay and the islands and historic parks and monuments on those islands within the bay – as well as the natural parks on-shore, and its several coastal and inland golf and country clubs. The rocky shores create a diverse environment for wildlife, and attract many fishermen to the area. The County's approximately 10 marinas suggest a significant presence of yachting and sailing activity. In East Greenwich Cove, there are a few waterfront restaurants and bars that attract a small nightlife crowd in summer months.

According to the National Oceanic and Atmospheric Administration, over 98 percent of all ocean-related jobs in Kent are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 549 establishments dedicated to leisure and hospitality alone in Kent County; the average weekly wage for employees of these establishments is \$311. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Kent County increased by only 790 jobs, or roughly a 10 percent increase (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that only 54.6 percent of all ocean recreation and tourism establishments in Kent County are small (U.S. Census Bureau, 2009).²

In 2009, there were 317 establishments dedicated to the ocean economy in Kent County. This represents an increase of 15.7 percent over the 274 establishments in the ocean economy in 2000. Employment in the sector saw a similar increase. There were 5,595 people directly employed in the ocean economy in 2009, compared to the 4,637 employed in 2000. Between 2000 and 2009, employment in the ocean economy grew by 20.7 percent.

There are 25 hotels, no bed and breakfasts, and only three campgrounds in Kent County. According to the U.S. Census, 1.2 percent of all houses in Kent County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data available in Exhibit 5 show illustrate the sharp increase in tourism-related employment in summer months, though in total, employment only increases by approximately 10 percent across the entire tourism sector.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Kent County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	-
Marinas (713930)	74	115	91	18.2%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	32	52	39	100% [#]
Renting Pleasure Boats (532292)	-	-	-	-
Land-Based				
Hotel Employment (72111)	0	839	0	-100% [^]
Restaurant Employment (7221 & 7222)	6,004	6,459	6,187	-6.7%
Amusement, Gambling, Other Recreation (713)	548	931	731	2.2%
General Tourism				
Travel Agencies (561510)	58	54	58	-10.8%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Boat Dealers was listed as 0 in 2005.

[^] BLS figure for Hotel Employment was listed as 779 in 2005.

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Newport County, Rhode Island

1. Synopsis

Newport County, Rhode Island is comprised of several towns within various island and peninsulas in Narragansett Bay. Newport County is recognized worldwide as a sailing and yachting center, and on more than one occasion, has played host to some of the most prestigious sailing races. Consequently, Newport County attracts a relatively affluent crowd. Newport County has only six towns and cities, the largest being Newport, with a population of 24,672 residents. The County's population is 82,888 (U.S. Census Bureau, 2010a).

Tourism represents an important percentage of the ocean economy. According to the National Oceanic and Atmospheric Administration, 74.8 percent of all ocean-related jobs in Newport County are related to tourism (National Oceanic and Atmospheric Administration, 2012). 72.6 percent of all ocean recreation and tourism-related businesses in the County are small (U.S. Census Bureau, 2009).¹ In 2009, 462 ocean-related establishments and 7,616 ocean-related jobs (National Ocean Economics Program, 2012).

2. Location

Newport County, shown in Exhibit 1, sits on the eastern shores of Narragansett Bay, with three larger and several small, uninhabited islands sitting within the bay. The County has a total area of 314 square miles (U.S. Census Bureau, 2010a). Newport County is bordered by Washington and Kent Counties adjacent to the Narragansett Bay to the west, Bristol County to the north, and Massachusetts to the east. The uninterrupted Atlantic Ocean sits directly south.

Exhibit 1. Map of Newport County



Source: ESRI, 2011 and OpenStreetMap, 2011.

No major interstate highways run through Newport County, though U.S. Route 24 offers a direct, major route to Boston, Massachusetts (Google, Inc., 2012). There are no commuter railroad stations in Newport County, though a dinner train does provide one loop around Aquidneck Island (Newport Dinner

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Train, 2012). The ferry dock in the City of Newport services Block Island and Point Judith, both in Washington County, Rhode Island. The nearby T.F. Green Airport in Providence is a major airport with regional, national, and international flight service (American Public Transportation Association, 2012).

3. Demographics

Newport County has a year-round population of 82,888 (U.S. Census Bureau, 2010a). The following three tables profile Newport County's population and demographics compared to the rest of the state. As Exhibit 2 shows, Newport County's population has decreased rather drastically over the last decade.

Exhibit 2. Population Profile

	Newport	Rhode Island
Year-Round Population	82,888	1,052,567
Population Change (2000-2010)	-2.98%	0.41%
Median Age (years)	43.2	49.6
Percent Female	51.2%	51.7%
Percent Foreign Born	6.2%	12.6%
<i>Ethnic Profile</i>		
White	90.2%	81.4%
Black/African American	3.5%	5.7%
Asian	1.6%	2.9%
Hispanic/Latino	4.2%	12.4%
American Indian	0.4%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Newport	Rhode Island
Unemployment Rate	6.2%	10.9%
Percent Out of Labor Force	29.9%	35.4%
Median Household Income	\$75,397	\$52,254
Percent of Population Below Poverty Line	5.8%	14.0%
<i>Educational Attainment</i>		
High School Diploma	24.1%	27.2%
Bachelor's Degree	24.8%	18.1%
Graduate/Professional Degree	17.7%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Newport	Rhode Island
Population Density (people/sq. mile)	809.6	1,018.1
Housing Density (structures/sq. mile)	408.2	448.2
Housing Structures that Are Independent Units	70.4%	59.5%
Occupied Units	83.5%	86.8%
Properties for Seasonal, Rec. or Occasional Use	10.0%	3.7%
Median House Value	\$388,800	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The Wampanoag people were the original inhabitants of the area, and had lived in southeastern Massachusetts and Rhode Island for thousands of years prior to the arrival of European colonists. Between 1675 and 1676, it is estimated that approximately 40 percent of the Wampanoag population was killed by English settlers during the King Phillip's War. Since that arrival of the colonists, the Wampanoag people have progressively decreased in population; only five tribes remain in eastern Massachusetts and Maine (Allard, 2004; Sultzman, 2011).

Newport County was first settled in the mid-1600's, just before King Philip's War. Early industry in the 18th century centered on trade, and Newport quickly rose to fame as a wealthy port area. The City of Newport was a major manufacturer of sperm whale oil, which made Newport one of the richest cities in the country. In the late 20th century, there was an influx of tourism to the area, and when the Preservation Society of Newport County opened the famed Newport Mansions to the public, tourism to the County increased drastically (City of Newport, Rhode Island, 2012).

The annual Newport Kite Festival, held at Ocean Drive State Park, is a weekend-long attraction for children and families that dates back to 1992 (Discover Newport, 2012; The Newport Kite Festival, 2012). The Black Ships Festival, which is to celebrate its 28th year in 2012, is a tradition that emphasizes both Japanese Art and Culture, and celebrates the signing of the Treat of Kanagawa in 1854, which ended Japanese isolation and allowed the two countries to become trading partners. The festival is also celebrated in Newport's sister city, Shimoda. In 2012, Newport will be an official host port for the Tall Ships Challenge Series in July. The Tall Ships often travel around the world's ports and harbors and attract a large following when residents and visitors are able to see into the 19th century maritime life. Newport is also the home to two well known annual music festivals: the Newport Folk Festival and the Newport Jazz Festival (Discover Newport, 2012).

5. Coastal Amenities

Newport County has approximately 175 miles of coastline scattered amongst the several peninsulas and islands that comprise the County. An overwhelming percentage of the coastline is rocky and wooded, but some of the southern-facing shoreline has very remote public and private sand or pebble beaches. The County has 18 public beaches, four harbors (and several more coves), 13 marinas, and three yacht clubs. Two of the three harbors, two of the three yacht clubs, and a large majority of the marinas in the County are located in the City of Newport (Allard, 2004). There is one national wildlife refuge – the Sachuest Point National Wildlife Refuge – that accounts for 242 acres of protected land along the County's southern shoreline (U.S. Fish and Wildlife Refuge, 2012). The Touro Synagogue is the County's only national park and is the oldest synagogue in the U.S (U.S. National Park Service, 2012).

The coastline is also fairly remote and lined only by smaller neighborhoods, except along the City of Newport's western coast, where a large amount of yachting, maritime trade, and industrial activity occurs. Newport County, especially in the City of Newport, is a well-known sailing and boating center, and thus attracts a very affluent population to its waters and waterfront areas (Allard, 2004).

Newport County's most well-known attractions are the Newport Mansions in the Bellevue Avenue Historic District, all built between 1750 and 1902 (The Preservation Society of Newport County, 2012). Fort Adams State Park located on Newport Harbor offers a wide range of activities including salt water bathing, fishing, boating, soccer, rugby, and picnicking and is the site of the Newport Jazz Festival and Newport Folk Festival (Allard, 2004). Newport County also has several historical landmarks to commemorate the American Revolutionary War. Fort Hamilton is a fortress on the smaller Rose Island,

used as a barracks during the War, and used as a U.S. Naval Torpedo Station in the late 19th century, and as munitions storage during World War I and World War II. The Fort Barton Woods and Revolutionary War Redoubt is now a town-owned park with several trails amongst the historic landmarks. The Christopher Columbus Statue and Monument commemorates the discovery of the New World (Allard, 2004; Discover Newport, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 2,725 business establishments in Newport County in 2010 (U.S. Bureau of Labor Statistics, 2010). The three largest employers in the County (and their respective number of employees) are: Raytheon (1,395), Newport Hospital (919), and the Newport Harbor Corporation (900) (Rhode Island Economic Development Corporation, 2011).

7. Coastal Tourism/Recreation Activity

The larger public beaches in Newport County include Second Beach and Easton Beach on Aquidneck Island, and South Shore Beach, Sakonnet Point Beach, and Fogland Beach on the mainland. These tracts of land are either white sand or pebble beaches, and many are remote. Beaches near Sakonnet Point Beach are very secluded, and some are sandy, ideal for sunbathing, walking, and swimming with an undisturbed view of the Atlantic Ocean (Allard, 2004; Discover Newport, 2012).

Newport's major coastal tourism draw, however, is the boating and yachting that is well-known to the area. Several maritime races for different boat classes and ages occur throughout summer months, and attract a generally wealthier population. Newport's historic downtown area is characterized by cobblestone streets, small boutiques, and high-end stores.

According to the National Oceanic and Atmospheric Administration, 74.8 percent of all ocean-related jobs in Newport are related to tourism (National Oceanic and Atmospheric Administration, 2012). Direct and indirect tourism expenditures exceeded an estimated \$790 million, which accounted for over 8,100 jobs. There are 447 establishments dedicated to leisure and hospitality alone in Newport County; the average weekly wage for employees of these establishments is \$384. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Newport County increased by 4,578 jobs, or by over 82 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 72.6 percent of all ocean recreation and tourism establishments in Newport County are small (U.S. Census Bureau, 2009).²

The ocean economy in Newport County employed 7,616 people at 462 establishments in 2009. In 2000, there were fewer establishments, or 406 establishments, but more direct jobs, or 7,771 jobs. Between 2000 and 2009, the number of establishments grew by 13.8 percent, but the number employed decreased by 2.0 percent (National Ocean Economics Program, 2012).

According to the U.S. Census, there are 33 hotels, 27 bed and breakfasts, and only one campground in Newport County (U.S. Census Bureau, 2009). An additional 10 percent of houses in Newport County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). Each of Newport’s tourism-related industries grow tremendously in summer months.

Exhibit 5. Newport County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	43	164	114	100% [#]
Marinas (713930)	153	431	275	10.0%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	-	208	0	-100% [^]
Renting Pleasure Boats (532292)	0	0	0	-100% [@]
Land-Based				
Hotel Employment (72111)	990	1,626	1,309	4.4%
Restaurant Employment (7221 & 7222)	2,971	5,118	3,950	4.9%
Amusement, Gambling, Other Recreation (713)	552	1,292	868	-6.2%
General Tourism				
Travel Agencies (561510)	0	0	0	0
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	0

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Scenic and Sightseeing Transportation, Water was listed as 0 in 2005.

[^] BLS figure for Boat Dealers was listed as 135 in 2005.

[@] BLS figure for Renting Pleasure Boats was listed as 3 in 2005.

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Providence County, Rhode Island

1. Synopsis

Providence County, Rhode Island is the northernmost shoreline along the Narragansett Bay and northernmost county in Rhode Island. Providence has 13 municipalities and an additional 17 villages within those municipalities. Providence County is the 97th most populous county in the United States. The County seat, largest City in the state, and the state capital is the City of Providence, which has a population of 178,042. The County's population is 626,667 people (U.S. Census Bureau, 2010a).

Tourism represents a significant portion of the ocean economy in Providence County. According to the National Oceanic and Atmospheric Administration, 96.3 percent of all ocean-related jobs are in tourism (National Oceanic and Atmospheric Administration). Approximately 70 percent of all ocean recreation and tourism establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 496 ocean-related establishments and 7,175 ocean-related jobs in the County (National Ocean Economics Program, 2012).

2. Location

Providence County, shown in Exhibit 1, comprises roughly the northern half of the state of Rhode Island. The County has a total area of 436 square miles (U.S. Census Bureau, 2010a). Providence County is bordered by Massachusetts to the north and east, Connecticut to the west, and Kent County, Bristol County, and Narragansett Bay to the south.

Exhibit 1. Map of Providence County



Source: ESRI, 2011 and OpenStreetMap, 2011.

As the state capital and the center of economic activity in Rhode Island, Providence is very accessible. Interstate highways include I-295, I-95, and I-195, among other major State and U.S. routes (Google, Inc., 2012). The T.F. Green Memorial State Airport is listed on most travel sites as being in Providence, though it is actually just over the border in neighboring Kent County. T.F. Green Airport has daily flights

¹ Establishments are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

to domestic and international destinations (American Public Transportation Association, 2012). Amtrak’s Northeast Regional Rail makes a stop in the City of Providence en route to Boston, New York, and Washington, D.C., among other locations (Amtrak, Inc., 2012). The Massachusetts Bay Transportation Authority provides one commuter rail service between Providence and Boston with multiple trips per day (Massachusetts Bay Transportation Authority, 2012). There are no ferries within the County, though the nearby Seastreak high-speed ferry services Martha’s Vineyard from nearby Providence Airport (American Public Transportation Association, 2012).

3. Demographics

Providence County has a year-round population of 626,667 (U.S. Census Bureau, 2010a). The following three tables profile Providence County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, Providence County is slightly more diverse, more densely populated, and less wealthy than the average county in Rhode Island.

Exhibit 2. Population Profile

	Providence	Rhode Island
Year-Round Population	626,667	1,052,567
Population Change (2000-2010)	0.81%	0.41%
Median Age (years)	37.0	49.6
Percent Female	51.7%	51.7%
Percent Foreign Born	17.5%	12.6%
<i>Ethnic Profile</i>		
White	73.4%	81.4%
Black/African American	8.5%	5.7%
Asian	3.7%	2.9%
Hispanic/Latino	18.8%	12.4%
American Indian	0.7%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Providence	Rhode Island
Unemployment Rate	11.9%	10.9%
Percent Out of Labor Force	37.4%	35.4%
Median Household Income	\$45,915	\$52,254
Percent of Population Below Poverty Line	17.6%	14.0%
<i>Educational Attainment</i>		
High School Diploma	28.2%	27.2%
Bachelor’s Degree	15.2%	18.1%
Graduate/Professional Degree	10.3%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Providence	Rhode Island
Population Density (people/sq. mile)	1,530.3	1,018.1
Housing Density (structures/sq. mile)	646.7	448.2
Housing Structures that Are Independent Units	47.9%	59.5%
Occupied Units	91.3%	86.8%
Properties for Seasonal, Rec. or Occasional Use	0.6%	3.7%
Median House Value	\$258,000	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Providence County was both a Wampanoag and Narragansett Tribal area, which were both Algonquian-speaking peoples; the western portions of the County were Narragansett, and the eastern portions were Wampanoag. Between 1675 and 1676, it is estimated that approximately 40 percent of the Wampanoag population was killed by the English settlers during the King Phillip's War. Since that time, the Wampanoag people have progressively decreased in population; only five tribes remain in eastern Massachusetts and Maine. Similarly, the Narragansett were either killed or forced to sell their lands. The majority of the few remaining Narragansett people by mid 17th century joined other neighboring tribes, while only some remained as part of the tribe. Currently, descendents of the Narragansett Tribe are part of the Narragansett Indian Tribe of Rhode Island in Charlestown, which regained federal recognition in 1983 (Conley and Campbell, 2012).

Providence County was first settled in the 1630's by Roger Williams. By the mid-1700's, frustration with British rule was mounting due to the high taxes levied against Providence's strong maritime, fishing, and agricultural industries. After the war, the City of Providence became the country's ninth largest city, and the economy shifted to manufacturing – including goods such as machinery, tools, silverware, and textiles – which attracted immigrants from Ireland, Germany, and Sweden, among others. By the 20th century, Providence County had some of the largest factories in the country (Conley and Campbell, 2012).

A popular event in the City of Providence is WaterFire, an annual event of 100 bonfires burning above the surface of the three rivers in the city. It is considered a public art installation, a performance, and an urban festival. The public – which averages over 40,000 people each year – is invited to stroll the riverfront while taking in the sights of the fires and sounds of the music (The Providence Warwick Convention & Visitors Bureau, 2011).

5. Coastal Amenities

Providence County has approximately 25 miles of shoreline at the northern tip of the Narragansett Bay, of which there is no view of the Atlantic Ocean from sea level (Allard, 2004). Providence County's coastline is almost entirely used for industrial purposes, particularly by ProvPort, Inc. – the port authority of the Port of Providence. Other coastal amenities includes parks, golf courses, and the East Bay Bicycle Path. The few beaches in the County are better suited for scenic walks only, as the industrial waters of the inner bay provide for poor swimming and ocean-recreation activities. There are six marinas/boatyards, and three yacht clubs, but there are no harbors and no public ocean-front beaches (Rhode Island Marinas, 2012). The Roger Williams National Memorial is the only national park in the County; there are no national wildlife refuges (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Some of the historical and popular attractions include the Roger Williams Park, Waterplace Park, and the First Baptist Church of Providence. The Roger Williams Park attracts visitors from all over New England, particularly for its well-regarded zoo, but also for the Roger Williams National Memorial, an urban park dedicated to the co-founder of Rhode Island. Waterplace Park is a recently-built park along the Woonasquatucket River with cobblestone walkways and Venice-style pedestrian bridges. The First Baptist Church of Providence is a tribute to the first Baptist Church built in the United States (The Providence Warwick Convention & Visitors Bureau, 2011).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 15,869 business establishments in Providence County in 2010 (U.S. Bureau of Labor Statistics, 2010). The Rhode Island State Government is the County's largest employer, which employed over 14,900 in 2010. Lifespan – a medical company that employed 10,882 people – and the Roman Catholic Diocese of Rhode Island – which employed 6,200 people – were the next largest employers. The two largest industries are education and health services, and trade, transportation, and utilities, which together account for approximately 36 percent of the economy. The Port of Providence is New England's second largest deepwater seaport (Rhode Island Economic Development Council, 2011).

7. Coastal Tourism/Recreation Activity

Coastal recreation is minimal in Providence County. There just a few beaches that are used for walking only, due to their rocky surfaces and industrial waters. There are several parks that line the Bay in the County, including Sabin Point Park, Crescent Park, Bold Point Park, and India Point Park, which are typically grass-surface parks with monuments of various reasons. The East Bay Bicycle Path extends for several miles along the eastern shore of the County (The Providence Warwick Convention & Visitors Bureau, 2011).

According to the National Oceanic and Atmospheric Administration, 96.3 percent of all ocean-related jobs in Providence are related to tourism (National Oceanic and Atmospheric Administration, 2012). There are 1,733 establishments dedicated to leisure and hospitality alone in Providence County; the average weekly wage for employees of these establishments is \$334. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Providence County increased by 1,774 jobs, or by eight percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 70 percent of all ocean recreation and tourism establishments in Providence County are small (U.S. Census Bureau, 2009).²

The ocean economy grew at a very fast rate between 2000 and 2009. In 2009, there were 496 establishments related to the ocean economy, and 7,175 direct jobs in the County. In 2000, there were only 404 establishments, and 5,804 direct jobs. Between 2000 and 2009, ocean-related establishments grew by 22.3 percent and ocean-related jobs grew by 23.6 percent (National Ocean Economics Program, 2012).

There are 25 hotels, two bed and breakfasts, and six campgrounds in Providence County (U.S. Census Bureau, 2009). According to the U.S. Census, less than one percent of all houses in Providence County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the County as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). The data in Exhibit 5 illustrate a relatively stable level of employment year-round in Providence County.

Exhibit 5. Providence County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0
Marinas (713930)	9	24	19	-9.5%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	0	0	0	-100% [#]
Renting Pleasure Boats (532292)	0	0	0	0
Land-Based				
Hotel Employment (72111)	1,054	1,064	1,075	6.4%
Restaurant Employment (7221 & 7222)	15,845	17,295	16,414	0.3%
Amusement, Gambling, Other Recreation (713)	2,218	3,290	16,414	5.1%
General Tourism				
Travel Agencies (561510)	117	122	120	-36.8%
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	0	0	0	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] BLS figure for Boat Dealers was listed as 21 in 2005.

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Washington County, Rhode Island

1. Synopsis

Washington County, Rhode Island is the southern-most county in Rhode Island and includes Block Island, roughly 13 miles from the shoreline. The County has nine incorporated towns and an additional 18 unincorporated villages. The County's population is 126,979 people, and is the least densely populated in the state (U.S. Census Bureau, 2010a). The County's southern shoreline, and nearly the entire shoreline around Block Island is undeveloped sand beach. Washington County, and particularly Block Island, is highly dependent on summer tourism.

According to the National Oceanic and Atmospheric Administration, an estimated 62.4 percent of all ocean-related jobs are related to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 85.4 percent of the ocean recreation and tourism-related establishments in the County are small (U.S. Census Bureau, 2009).¹ In 2009, there were 469 establishments dedicated to the ocean economy and 7,500 direct jobs in that sector (National Ocean Economics Program, 2012).

2. Location

Washington County, shown in Exhibit 1, is Rhode Island's most southern county. It has roughly half of its shoreline along Narragansett Bay, and the other half along the open Atlantic Ocean. Washington County includes Block Island, a land mass of only 9.7 square miles that is 13 miles off the southern shore of Rhode Island. The County has a total area of 563 square miles (U.S. Census Bureau, 2010a). Washington County is bordered by Connecticut to the west, Kent County to the north, Newport County adjacent to Narragansett Bay to the east, and the Atlantic Ocean to the south.

Exhibit 1. Map of Washington County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Certain parts of Washington County are more accessible than others. U.S. Route 1 runs along the entire coast (including the north-south portion along the Narragansett Bay), and Interstate-95 runs through the northwest corner of the County; other lesser routes connect various parts of the County (Google, Inc.,

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

2012). There are two Amtrak Stations in Washington County along the rail’s Northeast Regional Line: one in Westerly and one in Kingstown (Amtrak, Inc., 2012). The Block Island Airport only serves private charters and one commercial airline – New England Airlines, with service to Westerly, RI only. The nearest major airport, T.F. Green Memorial Airport, is just north of the County’s border in Kent County. Ferries to Block Island arrive from New London, CT, Montauk on Long Island, NY, Newport, RI, and Point Judith, RI (Washington County) (American Public Transportation Association, 2012).

3. Demographics

Washington County has a year-round population of 126,979 (U.S. Census Bureau, 2010a). The following three tables profile Washington County’s population and demographics compared to the rest of the state. As Exhibit 2 shows, despite its low population, Washington County grew at a faster rate than the rest of Rhode Island.

Exhibit 2. Population Profile

	Washington	Rhode Island
Year-Round Population	126,979	1,052,567
Population Change (2000-2010)	2.78%	0.41%
Median Age (years)	42.3	49.6
Percent Female	51.4%	51.7%
Percent Foreign Born	4.1%	12.6%
<i>Ethnic Profile</i>		
White	93.8%	81.4%
Black/African American	1.2%	5.7%
Asian	1.6%	2.9%
Hispanic/Latino	2.4%	12.4%
American Indian	0.9%	0.6%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Washington	Rhode Island
Unemployment Rate	8.4%	10.9%
Percent Out of Labor Force	33.2%	35.4%
Median Household Income	\$70,161	\$52,254
Percent of Population Below Poverty Line	8.7%	14.0%
<i>Educational Attainment</i>		
High School Diploma	21.7%	27.2%
Bachelor’s Degree	25.9%	18.1%
Graduate/Professional Degree	18.0%	12.2%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Washington	Rhode Island
Population Density (people/sq. mile)	385.7	1,018.1
Housing Density (structures/sq. mile)	188.9	448.2
Housing Structures that Are Independent Units	81.9%	59.5%
Occupied Units	79.1%	86.8%
Properties for Seasonal, Rec. or Occasional Use	16.0%	3.7%
Median House Value	\$351,100	\$279,300

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Washington County was home to the Narragansett Tribe, which was an Algonquian-speaking nation. Throughout the mid-17th century, the Narragansett population declined as a result of conflict and forced land sales. Many of the Narragansett people joined other neighboring tribes by the latter half of the century, though some remained as part of the tribe. Currently, descendants of the Narragansett Tribe are part of the Narragansett Indian Tribe of Rhode Island in Charlestown, which regained Federal recognition in 1983 (Native American Art, 2010).

Roger Williams settled in the area that would become Washington County in the early 1930s, first in the north but progressively spread south to the more wilderness regions. Manufacturing began in the County in the late 18th century driven by plentiful waterpower along the rivers and grew more prominent in the early 19th century. Early production included textiles, iron, leather tanneries, and shoes. However, as manufacturing moved to the southern United States in the mid-20th century, and many mills were closed down. Today, many of Washington County's towns are "bedroom communities" to Providence. Coastal tourism is a major part of the economy of the southern towns (Town of Narragansett, 2012; Town of North Kingstown, 2012).

Events in Washington County are both marine and art based. The Wickford Art Festival in Seaside Wickford Village is a two day festival featuring over 250 artists, that that South County Tourism Council claims to be ranked as the number one fine arts festival in New England. Two important week-long events in the County are the Block Island Race Week in the middle of June, and the Americas Cup World Series Races, the following week. During the Americas Cup World Series Races, Rhode Island Bay Cruises offers sightseeing cruises to explore the 45 catamarans in the races (South County Tourism Council, 2012).

5. Coastal Amenities

Washington County has over 100 miles of coastline, including the 20 miles of coastline on Block Island (Block Island Chamber of Commerce, 2012; Google, Inc., 2012). The southern shore of Washington County is almost entirely uninterrupted stretches of sandy beach. There are nearly 50 public beaches in the County, as well as several more remote, private beaches. The County has only four harbors (although several more coves), 16 marinas and boatyards, and six yacht clubs (Google, Inc., 2012; Rhode Island Visitors Network, 2012). There are four national wildlife refuges that include (with the number of acres of protected land): Ninigret National Wildlife Refuge (900); Block Island National Wildlife Refuge (127); Trustum Pond National Wildlife Refuge (800); and the John H. Chafee National Wildlife Refuge (317). There are no national parks in the County (U.S. Fish and Wildlife Service, 2012; U.S. National Park Service, 2012).

Washington County has several museums, historical landmarks, and lighthouses of note. The Westerly Armory Museum was deemed an “American treasure” by Congress in 2003 and houses a collection of military and community artifacts. Smith’s Castle, built in 1938, was once the trading post of Rhode Island founder Roger Williams. Within Washington County, including Block Island, there are six historic lighthouses that are not necessarily museum-like attractions, but nonetheless attract visitors for their addition to the scenery of the coast (South County Tourism Council, 2012).

6. General Economic Situation

The U.S. Bureau of Labor Statistics listed 3,811 business establishments in Washington County in 2010 (U.S. Bureau of Labor Statistics, 2010). The County’s largest employer is General Dynamics Electric Boat – a submarine manufacturer in North Kingstown that employs 2,200 people. The University of Rhode Island employs over 2,100 people, and APC Schneider Electric – an electric computing and data manufacturing company – employs over 1,200 (Rhode Island Economic Development Council, 2011).

7. Coastal Tourism/Recreation Activity

The coast within the Narragansett Bay is ideal for kayaking, sailing, and harbor cruises. The southern coast, characterized by sandy stretches of beach with views of the open Atlantic Ocean are more suitable for sunbathing, beachcombing, swimming, and surfing. The beaches along the southern shore are generally more remote and less developed. The coast in Block Island is extremely remote and undeveloped, and mixes lengthy stretches of sandy beach with high cliffs, wildlife refuges, and wetlands.

According to the National Oceanic and Atmospheric Administration, 62.4 percent of all ocean-related jobs in Washington are related to tourism (National Oceanic and Atmospheric Administration, 2012). It is estimated that in 2010, direct and indirect tourism expenditures in the County exceed \$751 million, and accounted for over 5,700 direct and indirect jobs. There are 574 establishments dedicated to leisure and hospitality alone in Washington County; the average weekly wage for employees of these establishments is \$330. Between the height of the winter and summer seasons in 2010, leisure and hospitality employment in Washington County increased by 5,285 jobs, or by approximately 96 percent (U.S. Bureau of Labor Statistics, 2010). U.S. Census data states that 85.4 percent of all ocean, recreation, and tourism establishments in Washington County are small (U.S. Census Bureau, 2009).²

In 2009, there were 469 establishments in the ocean economy in Washington County. As compared to the 427 establishments listed in 2009, there was a 9.8 percent increase in ocean establishments between 2000 and 2009. Employment in the sector grew at a much faster rate. There were 7,500 people directly employed in the sector in 2009, a 26.3 percent increase over the 5,938 people employed in 2000.

There are 33 hotels, 17 bed and breakfasts, and 11 campgrounds in Washington County (U.S. Census Bureau, 2009). According to the U.S. Census, an additional 16 percent of all houses in Washington County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010b).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest tourism-related employer in the county as the restaurant industry (U.S. Bureau of Labor Statistics, 2010). As illustrated in Exhibit 5, employment in almost every tourism-related industry is dependent on the summer tourist season.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Washington County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	August	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	23	14	100% [#]
Marinas (713930)	128	297	199	30.9%
Boat Building and Repair (336612)	0	0	0	0
Boat Dealers (441222)	49	60	54	-19.4%
Renting Pleasure Boats (532292)	0	0	0	-100% [^]
Land-Based				
Hotel Employment (72111)	112	824	410	1.5%
Restaurant Employment (7221 & 7222)	3,785	6,592	4,860	5.7%
Amusement, Gambling, Other Recreation (713)	933	1,983	1,277	11.9%
General Tourism				
Travel Agencies (561510)	22	19	20	-23.1
Tour Operators (561520)	0	0	0	0
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-

Source: U.S. Bureau of Labor Statistics, 2010.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[#] Bureau of Labor Statistics figure for Scenic and Sightseeing Transportation, Water was listed as 0 in 2005.

[^] Bureau of Labor Statistics figure for Renting Pleasure Boats was listed as 6 in 2005.

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Beaufort County, South Carolina

1. Synopsis

Beaufort County is located on the southeastern Atlantic coast of South Carolina. The County is known for its many islands, warm climate, history, and Gullah culture. Beaufort is comprised of six cities and town and a collection of unincorporated communities. Approximately 162,000 people reside in Beaufort County, which has a population density of 282 people per square mile and a housing density of 161 units per square mile (U.S. Census Bureau, 2010). Since the 1970s, Beaufort has developed rapidly, with several well-known resort communities.

Tourism represents a significant portion of the ocean economy in Beaufort County. In 2009, 540 ocean-related establishments directly employed 9,420 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 98.60 percent of the ocean-related jobs in Beaufort County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Over half—61.11 percent—of the ocean recreation and tourism-related businesses in Beaufort County are small (U.S. Census Bureau, 2009).¹

2. Location

Beaufort County, shown in Exhibit 1, is located in the southeastern corner of South Carolina. Adjacent counties include Colleton County (to the north), Jasper County (to the west), and Hampton County (to the northwest) (Google, Inc., 2012). The County has 576 square miles of land and over 30 miles of shoreline along the Atlantic Ocean, Port Royal Sound, and a network of rivers (Google, Inc., 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Beaufort County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Beaufort County is accessible by car, bus, train, and plane. U.S. Route 278 bisects Beaufort's southern half, while U.S. Route 21 passes through the northern half. South Carolina Highway 170 crosses the

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Broad River Bridge and connects the northern and southern portions of the County (Google, Inc., 2012). The County also operates a bus service. Amtrak train service runs through Yemassee (25 miles from Beaufort) and visitors arriving by plane can travel through the Hilton Head Island Airport or Beaufort County Airport (Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2012).

3. Demographics

Beaufort County has a year-round population of 162,233 (U.S. Census Bureau, 2010). The following three tables profile Beaufort County's population. As Exhibit 2 shows, at 34.1 percent, the rate of population growth in Beaufort County almost doubled the rate of State population growth (15.3 percent) in the past decade.

Exhibit 2. Population Profile

	Beaufort	South Carolina
Year-Round Population	162,233	4,012,012
Population Change (2000-2010)	34.1%	15.3%
Median Age (Years)	40.6	37.9
Percent Female	50.6%	51.4%
Percent Foreign Born	9.6%	4.7%
<i>Ethnic Profile</i>		
White	71.9%	66.2%
Black/African American	19.3%	27.9%
Asian	1.2%	1.3%
Hispanic/Latino	12.1%	5.1%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Beaufort	South Carolina
Unemployment Rate	7.3%	10.8%
Percent Out of Labor Force	38.3%	35.6%
Median Household Income	\$55,286	\$43,939
Percent of Pop. Below Poverty Line	10.5%	15.3%
<i>Educational Attainment</i>		
High School Diploma	24.2%	30.5%
Bachelor's Degree	23.2%	15.6%
Graduate/Professional Degree	14.1%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Beaufort	South Carolina
Population Density (people/sq. mile)	281.5	153.9
Housing Density (structures/sq. mile)	161.4	71.1
Housing Structures that are Independent Units	60.3%	62.2%
Occupied Units	71.2%	84.3%
Properties for Seasonal, Rec. or Occasional Use	16.0%	5.3%
Median House Value	\$290,900	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

In 1514, Beaufort County was the site of the second landing of Europeans on the North American continent. When the Spanish and French explorers first arrived in present-day Beaufort, they encountered the Cherokee, Catawba, and Yemassee tribes, among others. The French settled around Port Royal in 1562, forming the first Protestant settlement in the United States. However, the French settlers eventually returned to France in the first ship built in America to cross the Atlantic Ocean.

After the departure of the French, Spanish settlers relocated from Florida and built Fort San Felipe on Parris Island in 1566. The fort was located on the present-day Parris Island golf course. English explorers sent by Queen Elizabeth in 1587 challenged the Spanish at Fort San Felipe. The Spanish abandoned the fort.

In 1663, English King Charles II granted the land around present-day Beaufort to colonial proprietors. English immigrants established the first permanent European settlement in South Carolina in 1670. The settlement developed into a plantation community and trade of the major crops, rice, indigo, and cotton, brought great wealth to Beaufort. The plantation economy led to the introduction of slavery and, by 1720, slaves formed the majority of the population.

Conflicts arose between the local tribes and the settlers, such as the Yemassee War of 1715. This war was the last time that the settlements were seriously threatened by the tribes' forces.

In 1769, Beaufort County was founded and named after one of the colonial proprietors, Henry Somerset, Duke of Beaufort. Soon after, the American Revolution began. South Carolina witnessed more battles, lost more men, and contributed more money to the colonial forces than any other colony.

Leading up to the Civil War, the Ordinance of Secession was drafted in Beaufort County. Union troops occupied Beaufort's ports for most of the war, saving the area from property damage. However, the plantation economy was lost. After the Civil War, the South's first school for freed slaves, the Penn Center, was established in Beaufort County and the Gullah, or Sea Island Creole, culture began to flourish.

In the late 1800s, Beaufort's economy depended on agriculture, lumbering, and commercial fishing. The area was slow to modernize; it was not until 1960 that many smaller communities received electricity. However, after the mid-1900s, Beaufort and Hilton Head, in particular, began to develop quickly into a resort destination. Today, development continues at a rapid pace in Beaufort, especially in the area around U.S. Highway 278 (Beaufort Area History, 2004; Beaufort County, South Carolina, 2008; Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2010; Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2012).

Beaufort County hosts several annual events, including the Soft Shell Crab Festival, Original Gullah Festival, Water Festival, Shrimp Festival, and Heritage Days at Penn Center (Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2012).

5. Coastal Amenities

Beaufort County has over 30 miles of shoreline along the Atlantic Ocean, the Port Royal Sound, and a network of rivers. It is located on one of the largest natural harbors on the Atlantic coast. Its coast consists of hundreds of barrier and sea islands, many of which are privately owned (Google, Inc., 2012).

In addition to the islands, expanses of nature preserve distinguish the landscape. The marshlands and maritime forests provide habitat for a variety of wildlife. Beaufort has two federally protected areas, Pinckney Island National Wildlife Refuge and part of Ernest F. Hollings ACE Basin National Wildlife Refuge. Beaufort also houses the Hunting Island State Park (5,000 acres) (U.S. Fish and Wildlife Service, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 4,813 business establishments in Beaufort County in 2009 (U.S. Census Bureau, 2009). The top civilian employers in the area around the City of Beaufort are: the Beaufort County School District, the Civilian Department of Defense, and Wal-Mart Associates, and the County of Beaufort. There are also three military installations in Beaufort (City of Beaufort Economic Development, 2012).

7. Coastal Tourism/Recreation Activity

Beaufort County is known for its many islands, warm climate, history, and Gullah culture. Beaufort County boasts over 200 islands, many of which are undeveloped. On the islands, tourists can birdwatch, hike, bicycle, boat, golf, fish, and dine on fresh seafood. On Parris Island, visitors can attend a graduation ceremony for the Marine Corps Recruit Depot; the ceremonies take place several times per month throughout the year.

There are many historic sites to visit in Beaufort, including: the site of the Spanish Fort San Felipe; the Milton Maxcy House, where the Ordinance of Secession was drafted; and Dr. Martin Luther King's retreat, where he began to pen his "I Have a Dream" speech.

The Gullah, or Sea Island Creole, culture is unique to the Lowcountry of South Carolina and Georgia. It is a strong presence in Beaufort. The culture is famous for its storytelling, cuisine, music, language, and crafts, including the traditional sweetgrass basket (Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 98.60 percent of the ocean-related jobs in Beaufort County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$956.89 million in Beaufort County, generating \$192.81 million in payroll income and supporting 11,880 jobs (South Carolina Department of Parks, Recreation and Tourism, 2011). There are 543 establishments dedicated to leisure and hospitality in Beaufort County; the average weekly wage for employees of these establishments is \$367. Leisure and hospitality employment in Beaufort County increased by 2,736 jobs, or 25.47 percent, from winter to summer in 2010, reflecting the seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 61.11 percent of ocean recreation and tourism-related businesses in Beaufort County are small (U.S. Census Bureau, 2009).²

In 2009, 540 ocean-related establishments directly employed 9,420 people in Beaufort County. These numbers reflected an increase from 2000, when 331 establishments employed 6,298 people. From 2000 to 2009, the number of ocean-related establishments grew by 63.1 percent and the number of

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

people employed by these establishments grew by 49.6 percent (National Ocean Economics Program, 2012).

There are 55 hotels, seven bed and breakfasts, and five campgrounds in the County (Beaufort Regional Chamber of Commerce Visitor and Convention Bureau, 2012; U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed \$4,770,817 in lodging tax revenue, which includes taxes on campgrounds (South Carolina State Treasurer's Office, 2011). Approximately 16.0 percent of the housing units in Beaufort County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and other recreation industry. Since 2005, each of these industries has experienced a modest decline in employment. The U.S. Bureau of Labor Statistics data reflect the seasonal nature of the industries.

Exhibit 5. Beaufort County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	13	83	53	-13.1%
Marinas (713930)	91	104	97	94.0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	64	82	79	-20.2%
Renting Pleasure Boats (532292)	42	159	86	17.8%
Land-Based				
Hotel Employment (72111)	1,907	2,563	2,260	-5.4%
Restaurant Employment (7221 & 7222)	6,095	8,107	7,228	-1.0%
Amusement, Gambling, Other Recreation (713)	1,672	1,861	1,760	-3.4%
Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
General Tourism				
Travel Agencies (561510)	21	22	22	-46.3%
Tour Operators (561520)	13	21	16	14.3%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Charleston County, South Carolina

1. Synopsis

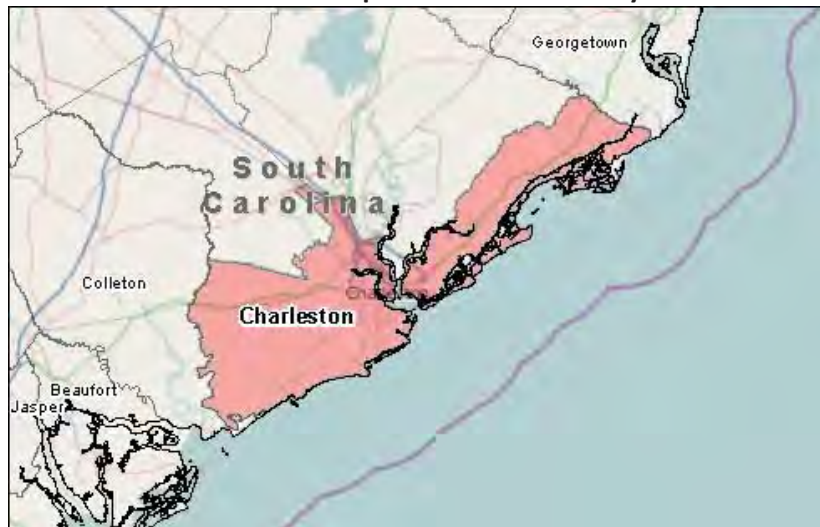
Charleston County is located in the center of South Carolina’s Atlantic coast. The County is known for its historic role as an important Atlantic port as well as its many islands and beaches. Charleston is comprised of four cities, eleven towns, and a collection of unincorporated communities. With approximately 350,000 residents, Charleston County is the third most populous county in South Carolina; Charleston has a population density of 382 people per square mile and a housing density of 186 units per square mile (U.S. Census Bureau, 2010). Manufacturing, military operations, port activity, and tourism provide the economic base for Charleston County.

Tourism represents a large portion of the ocean economy in Charleston County. In 2009, 1,037 ocean-related establishments directly employed 22,968 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 84.80 percent of the ocean-related jobs in Charleston County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately half—55.1 percent—of the ocean recreation and tourism-related businesses in Charleston County are small (U.S. Census Bureau, 2009).¹

2. Location

Charleston County, shown in Exhibit 1, is located in the center of South Carolina’s Atlantic coast. Adjacent counties include Berkeley County (to the north), Georgetown County (to the northeast), Colleton County (to the west), and Dorchester County (to the northwest) (Google, Inc., 2012). The County has 916 square miles of land and nearly 100 miles of shoreline along the Atlantic Ocean (Charleston County Government, 2008; U.S. Census Bureau, 2010).

Exhibit 1. Map of Charleston County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Charleston County is accessible by car, bus, plane, boat, and train. Major highways serving Charleston County include U.S. Route 17b and Interstates I-26 and I-526 (Google, Inc., 2012). The County provides

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

public bus service and Greyhound Bus operates a route through Charleston. For visitors traveling by air, Charleston County offers three airports: the Charleston International Airport, Charleston Executive Airport, which is open for public use but has no commercial service, and Mount Pleasant Regional Airport, which provides facilities for private aircraft. The South Carolina State Port Authority is located in Charleston, as is a station served by Amtrak rail (Things to Do in Charleston, 2011).

3. Demographics

Charleston County has a year-round population of 350,209 (U.S. Census Bureau, 2010). The following three tables profile Charleston County's population. As Exhibit 2 shows, except for population and housing density, the demographics of Charleston County generally mirror those of the State. The population in Charleston County grew by 13.0 percent over the past decade. This rate is similar to that of State population growth (15.3 percent).

Exhibit 2. Population Profile

	Charleston	South Carolina
Year-Round Population	350,209	4,012,012
Population Change (2000-2010)	13.0%	15.3%
Median Age (Years)	35.9	37.9
Percent Female	51.5%	51.4%
Percent Foreign Born	5.6%	4.7%
<i>Ethnic Profile</i>		
White	64.2%	66.2%
Black/African American	29.8%	27.9%
Asian	1.3%	1.3%
Hispanic/Latino	5.4%	5.1%
American Indian	0.3%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Charleston	South Carolina
Unemployment Rate	7.9%	10.8%
Percent Out of Labor Force	33.5%	35.6%
Median Household Income	\$48,433	\$43,939
Percent of Pop. Below Poverty Line	16.5%	15.3%
<i>Educational Attainment</i>		
High School Diploma	23.5%	30.5%
Bachelor's Degree	24.1%	15.6%
Graduate/Professional Degree	13.4%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Charleston	South Carolina
Population Density (people/sq. mile)	382.3	153.9
Housing Density (structures/sq. mile)	185.6	71.1
Housing Structures that are Independent Units	58.3%	62.2%
Occupied Units	84.9%	84.3%
Properties for Seasonal, Rec. or Occasional Use	4.4%	5.3%
Median House Value	\$242,100	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

English settlers arrived in the area of present-day Charleston County in 1670 and established the community of Charles Town on the bank of the Ashley River. The settlement was relocated to a peninsula between the Ashley and Cooper Rivers and renamed Charleston. It served as the economic and political capital of South Carolina through 1790.

The boundaries and political authority of Charleston County changed many times since the land was first settled. The County as it is today was formed in 1800, comprised of six former parishes, and was reduced slightly in 1878 and 1897, when portions of the County were separated to form Berkeley County and Dorchester County, respectively.

In addition to the original English settlers, French settlers and African slaves also lived in the area, as did several Native American tribes. The local economy developed around plantation agriculture (major crops included indigo, rice, and cotton) and trade with the tribes and with England. As a result of trade, Charleston became one of the most important ports on the Atlantic.

Charleston County witnessed fighting in the American Revolution—the bombardment of Fort Moultrie, made of palmetto wood, led to the image of a palmetto tree being selected for the State flag—and in the Civil War with the April 1861 attack on Fort Sumter marked the beginning of the war. Charleston County suffered extensive damage in the Civil War, which was worsened by a major earthquake soon after the War.

Through the late 1800s and early 1900s, Charleston’s economy recovered due to the development of the manufacturing, defense, and railroad industries. According to the County website, Charleston began the “manufacturing center of South Carolina.” Today, manufacturing, military operations, port activity, and tourism provide the economic base for Charleston County (Charleston County Government, 2008; Charleston County Government, 2011; Charleston County, South Carolina, 2008; Coastal Guide, 2011).

Charleston County hosts several annual events. They include: the Lowcountry Oyster Festival, Lowcountry Blues Bash, Festival of Houses and Gardens by Historic Charleston Foundation, Lowcountry Shrimp Festival and Blessing of the Fleet, and Lowcountry Cajun Festival (South Carolina’s Information Highway, 2012b).

5. Coastal Amenities

Charleston County has nearly 100 miles of shoreline (Charleston County Government, 2008). There are five public beaches, three harbors, 16 marinas, and 23 yacht clubs in the County (Charleston Area Convention and Visitors Bureau, 2012; Google, Inc., 2012; U.S. Census Bureau, 2010). There are also three full national parks and wildlife refuges. Charleston County includes expanses of federally protected

land, including the Cape Romain National Wildlife Refuge (64,000 acres), Charles Pinckney National Historic Site, Fort Moultrie National Monument, Fort Sumter National Monument, and parts of the Ernest F. Hollings ACE Basin National Wildlife Refuge (11,815 acres in Beaufort, Charleston, Colleton, and Hampton Counties) and Francis Marion National Forest (258,816 acres in Charleston and Berkeley Counties) (Things to Do in Charleston, 2011; South Carolina's Information Highway, 2012a; South Carolina's Information Highway, 2012c; South Carolina Department of Natural Resources, 2007; U.S. Fish and Wildlife Service, 2012).

There several historically significant landmarks on Charleston's coast, including the Fort Moultrie National Monument, Fort Sumter National Monument, and Morris Island Lighthouse (Charleston Area Convention and Visitors Bureau, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 11,764 business establishments in Charleston County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Joint Base Charleston, Medical University of South Carolina (MUSC), and Charleston County School District. As the largest employer, the Joint Base Charleston supports about 22,000 jobs, followed by the MUSC, with 11,000 employees (Charleston County Department of Economic Development, 2010).

7. Coastal Tourism/Recreation Activity

Tourism in Charleston County focuses on the County's history and natural landscapes. The County has been a hub of social, political, and economic activity since colonial times. It houses quite a few historical landmarks, including plantations, stately homes, and military forts. In addition to its historical significance, Charleston offers a large variety of options for nature-oriented recreation. Tourists can hike through the nature preserves, swim or lounge on miles of beach, and explore the many sea islands, some of which are popular tourist destinations, while others remain undeveloped and remote. Visitors can also enjoy the outdoors by kayaking, biking, horseback riding, fishing, and golfing (Charleston Area Convention and Visitors Bureau, 2012; Charleston County Government, 2008).

According to the National Oceanic and Atmospheric Administration, an estimated 84.80 percent of the ocean-related jobs in Charleston County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$1.62 billion in Charleston County, generating \$341.88 million in payroll income and supporting 19,500 jobs (South Carolina Department of Parks, Recreation and Tourism, 2011). There are 1,246 establishments dedicated to leisure and hospitality in Charleston County; the average weekly wage for employees of these establishments is \$343. Leisure and hospitality employment in Charleston County increased by 4,287 jobs, or 16.66 percent, from winter to summer in 2010 (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 55.1 percent of ocean recreation and tourism-related businesses in Charleston County are small (U.S. Census Bureau, 2009).²

In 2009, 1,037 ocean-related establishments directly employed 22,968 people in Charleston County. These numbers reflected an increase from 2000, when 436 establishments employed 9,117 people. From 2000 to 2009, the number of ocean-related establishments grew markedly by 137.8 percent and

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

the number of people employed by these establishments grew by 151.9 percent (National Ocean Economics Program, 2012).

There are 111 hotels, 21 bed and breakfasts, and five campgrounds in the County (U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed \$8,808,750 in lodging tax revenue, which includes taxes on campgrounds (South Carolina State Treasurer's Office, 2011). Approximately 4.4 percent of the housing units in Charleston County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and other recreation industry.

Exhibit 5. Charleston County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	67	167	139	24.1%
Marinas (713930)	116	163	138	-7.4%
Boat Building and Repair (336612)	29	25	28	-88.4%
Boat Dealers (441222)	423	558	499	-1.8%
Renting Pleasure Boats (532292)	12	49	28	**
Land-Based				
Hotel Employment (72111)	4,607	5,892	5,320	-2.8%
Restaurant Employment (7221 & 7222)	16,919	19,076	18,358	3.6%
Amusement, Gambling, Other Recreation (713)	1,887	2,316	2,079	25.2%
General Tourism				
Travel Agencies (561510)	62	68	67	42.6%
Tour Operators (561520)	70	87	81	-19.8%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	148	211	190	-2.6%

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

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Colleton County, South Carolina

1. Synopsis

Colleton County is located along South Carolina’s Atlantic coast. The County is known for its natural landscapes and its family-friendly Edisto Beach. Colleton is comprised of 10 cities and towns. Approximately 39,000 people reside in Colleton County, which has a population density of 37 people per square mile and a housing density of 19 units per square mile (U.S. Census Bureau, 2010). The County’s economy depends on manufacturing.

Tourism represents a large portion of the ocean economy in Colleton County. In 2009, 16 ocean-related establishments directly employed 104 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 84.60 percent of the ocean-related jobs in Colleton County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Over half—62.1 percent—of the ocean recreation and tourism-related businesses in Colleton County are small (U.S. Census Bureau, 2009).¹

2. Location

Colleton County, shown in Exhibit 1, is located along South Carolina’s Atlantic coast. Adjacent counties include Orangeburg County (to the north), Dorchester County (to the northeast), Charleston County (to the east), Beaufort County (to the south), Hampton County (to the west), Allendale County (to the west), and Bamberg County (to the northwest) (Google, Inc., 2012). The County has 1,056 square miles of land and approximately 15 miles of shoreline along the Atlantic Ocean (Google, Inc., 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Colleton County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Colleton County is primarily accessible by car. Interstate I-95 bisects the County from north to south. Many other highways cross the County, including Interstates I-226 and I-16, U.S. Routes 17 and 21, and

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

South Carolina Routes 63, 64, and 303. Plane infrastructure also exists; the Lowcountry Regional Airport is located in Walterboro in the center of the County (Google, Inc., 2012).

3. Demographics

Colleton County has a year-round population of 38,892 (U.S. Census Bureau, 2010). The following three tables profile Colleton County's population. As Exhibit 2 shows, at 1.6 percent growth, the population has not changed substantially over the past decade. In contrast, the State population has grown by 15.3 percent over the same time period.

Exhibit 2. Population Profile

	Colleton	South Carolina
Year-Round Population	38,892	4,012,012
Population Change (2000-2010)	1.6%	15.3%
Median Age (Years)	40.7	37.9
Percent Female	51.8%	51.4%
Percent Foreign Born	2.2%	4.7%
<i>Ethnic Profile</i>		
White	57.0%	66.2%
Black/African American	39.0%	27.9%
Asian	0.3%	1.3%
Hispanic/Latino	2.8%	5.1%
American Indian	0.8%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Colleton	South Carolina
Unemployment Rate	13.4%	10.8%
Percent Out of Labor Force	42.9%	35.6%
Median Household Income	\$33,263	\$43,939
Percent of Pop. Below Poverty Line	21.3%	15.3%
<i>Educational Attainment</i>		
High School Diploma	39.1%	30.5%
Bachelor's Degree	9.5%	15.6%
Graduate/Professional Degree	4.2%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Colleton	South Carolina
Population Density (people/sq. mile)	36.8	153.9
Housing Density (structures/sq. mile)	18.8	71.1
Housing Structures that are Independent Units	54.8%	62.2%
Occupied Units	76.0%	84.3%
Properties for Seasonal, Rec. or Occasional Use	7.2%	5.3%
Median House Value	\$90,000	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Willtown, the first European settlement in present-day Colleton County, was established on the Edisto River in 1682. In the same year, Colleton County was formed as one of the first three proprietary counties in South Carolina. The County was named after Sir John Colleton, one of the eight proprietors of the Province of Carolina. Its borders and authority changed multiples times before 1920, when the County assumed its present size.

Willtown developed into an important center for regional trade until the 1740s, after which it suffered several waves of malaria and plundering by British troops during the American Revolution. Willtown did not return to prominence as a trade center, but it did become a popular seasonal residential community.

Another town, Jacksonborough, was first settled by the English in 1701; it had been the site of a Native American community named Pon Pon. In the American Revolution, the General Assembly met in Jacksonborough while Charleston was under siege; the town became the Provisional Capital of South Carolina during that time.

In the mid-1800s, the regional economy depended on rice production and trade. The rice crop cultivated on Colleton plantations earned the title, "Carolina Gold." However, by the early 1900s, rice production in Colleton had declined due to the end of slavery, the mechanization of rice production in other states, and various floods and hurricanes (Colleton County SCGen Web, 2012; Colleton County, South Carolina, 2008).

Edisto Beach, a community in Colleton County, began attracting residents in the early 1900s. The town, located on Edisto Island, was accessible only by riding across the marsh at low tide. Many of the homes were damaged by hurricanes in the mid-1900s, but the community witnessed a new wave of tourist interest in the late 1900s (Edisto Beach Condos, LLC., 2008).

Today, manufacturing provides the economic base for the County.

Colleton County hosts several annual events, including the Colleton County Rice Festival, Edisto Beach King Mackerel Tournament, and Edisto Marina Billfish Tournament (Colleton County South Carolina Economic Alliance, Inc., 2010a; Edisto Chamber of Commerce, 2012).

5. Coastal Amenities

Colleton County has approximately 15 miles of shoreline along the Atlantic Ocean (Google, Inc., 2012). There is one public beach with 38 access points, three marinas, and one yacht club (Coastal Travel Guide, 2012; Town of Edisto Beach, SC, 2012; U.S. Census Bureau, 2009). The County also includes part of one natural refuge, the Ernest F. Hollings ACE Basin National Wildlife Refuge, which has 350,000 acres spanning Beaufort, Charleston, Hampton, and Colleton Counties. Edisto State Park is also located in Colleton County; it covers 1,255 acres of forest, marsh, and beach (Colleton County South Carolina Economic Alliance, Inc., 2010a).

Colleton County's public beach is located in the Town of Edisto Beach, a popular tourist destination known for being un-commercialized and family-friendly (Colleton County South Carolina Economic Alliance, Inc., 2010a).

6. General Economic Situation

The U.S. Census Bureau lists 790 business establishments in Colleton County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County include: the Colleton County Government, Colleton County School District, and Wal-Mart (South Carolina Department of Commerce, 2012).

7. Coastal Tourism/Recreation Activity

Tourism in Colleton County is oriented toward outdoor recreation in the County's forests, marshes, and undeveloped coast. The Colleton County Economic Alliance website lists several options for nature-oriented activities, including hunting, fishing, boating, and shrimping (Colleton County South Carolina Economic Alliance, Inc., 2010b).

The Town of Edisto Beach, located at the mouth of the Edisto River, offers one of "the few remaining family-oriented, gently develop beaches on the eastern coastline," according to the Town's website. The beach is an ideal destination for tourists who enjoy boating, fishing, crabbing, shrimping, birdwatching, and beachcombing (Town of Edisto Beach, SC, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 84.60 percent of the ocean-related jobs in Colleton County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$89.43 million in Colleton County, generating \$17.11 million in payroll income and supporting 990 jobs (South Carolina Department of Parks, Recreation and Tourism, 2011). There are 75 establishments dedicated to leisure and hospitality in Colleton County; the average weekly wage for employees of these establishments is \$280. Leisure and hospitality employment in Colleton County increased by 154 jobs, or 14.86 percent, from winter to summer in 2010 (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 62.1 percent of ocean recreation and tourism-related businesses in Colleton County are small (U.S. Census Bureau, 2009).²

In 2009, 16 ocean-related establishments directly employed 104 people in Colleton County. These numbers suggest that the ocean-related industries have not changed dramatically from 2000, when 15 establishments employed 116 people. From 2000 to 2009, the number of ocean-related establishments decreased by 6.7 percent and the number of people employed by these establishments decreased by 10.3 percent (National Ocean Economics Program, 2012).

There are 17 hotels, one bed and breakfast, and three campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed \$532,830 in lodging tax revenue, which includes taxes on campgrounds (South Carolina State Treasurer's Office, 2011). Approximately 7.2 percent of the housing units in Colleton County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Colleton County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	- [^]
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	-	-	-	- [^]
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	0	0	0	-100.0%
Restaurant Employment (7221 & 7222)	724	867	806	-9.5%
Amusement, Gambling, Other Recreation (713)	0	0	0	0%
General Tourism				
Travel Agencies (561510)	-	-	-	- [^]
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Georgetown County, South Carolina

1. Synopsis

Georgetown County is located along South Carolina’s Atlantic coast. The County is known for its history and its beaches. Georgetown is comprised of four cities and towns and a collection of unincorporated communities. Approximately 60,000 people reside in Georgetown County, which has a population density of roughly half that of the State of South Carolina (U.S. Census Bureau, 2010). The County’s economy depends on the wood products, advanced metals manufacturing, and tourism industries.

Tourism represents a significant portion of the ocean economy in Georgetown County. In 2009, 199 ocean-related establishments directly employed 3,147 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 97.90 percent of the ocean-related jobs in Georgetown County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Over half—61.73 percent—of the ocean recreation and tourism-related businesses in Georgetown County are small (U.S. Census Bureau, 2009).¹

2. Location

Georgetown County, shown in Exhibit 1, is located along South Carolina’s Atlantic coast. The County lies about 35 miles from Myrtle Beach, 60 miles from Charleston, and 120 miles from Columbia. Adjacent counties include Williamsburg County (to the west), Horry County (to the north), Berkeley County (to the southwest), and Charleston County (to the southwest) (Google, Inc., 2012). The County has 814 square miles of land and approximately 40 miles of shoreline along the Atlantic Ocean (Google, Inc., 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Georgetown County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Georgetown County is accessible by boat, rail, plane, and car. The Georgetown Harbor lies within 14 miles of the open sea and is the site of the International Port of Georgetown. The County is served by

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

the CSX Railroad. For air travel, Georgetown has easy access to several major airports, including the Myrtle Beach International Airport, within a 30-minute drive to the north, and the Charleston International Airport, 60 miles to the south. Georgetown also has its own Georgetown County Airport (Georgetown County Economic Development Commission, 2011a). Key highways that run through Georgetown County include U.S. Routes 17, 701, and 521 (Google, Inc., 2012).

3. Demographics

Georgetown County has a year-round population of 60,158 (U.S. Census Bureau, 2010). The following three tables profile Georgetown County's population. As Exhibit 2 shows, at 7.8 percent growth, the population has increased over the past decade, but at a pace that is roughly half that of the State's growth (15.3 percent). By other measures, however, Georgetown mirrors South Carolina as a whole.

Exhibit 2. Population Profile

	Georgetown	South Carolina
Year-Round Population	60,158	4,012,012
Population Change (2000-2010)	7.8%	15.3%
Median Age (Years)	45.4	37.9
Percent Female	52.4%	51.4%
Percent Foreign Born	3.0%	4.7%
<i>Ethnic Profile</i>		
White	63.2%	66.2%
Black/African American	33.6%	27.9%
Asian	0.5%	1.3%
Hispanic/Latino	3.1%	5.1%
American Indian	0.2%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Georgetown	South Carolina
Unemployment Rate	12.1%	10.8%
Percent Out of Labor Force	45.3%	35.6%
Median Household Income	\$42,666	\$43,939
Percent of Pop. Below Poverty Line	19.7%	15.3%
<i>Educational Attainment</i>		
High School Diploma	32.5%	30.5%
Bachelor's Degree	9.6%	15.6%
Graduate/Professional Degree	8.1%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Georgetown	South Carolina
Population Density (people/sq. mile)	73.9	153.9
Housing Density (structures/sq. mile)	41.4	71.1
Housing Structures that are Independent Units	60.1%	62.2%
Occupied Units	72.8%	84.3%
Properties for Seasonal, Rec. or Occasional Use	15.2%	5.3%
Median House Value	\$174,700	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

The first European settlers in present-day Georgetown County were Spanish adventurers seeking gold. They arrived in 1526 but soon left the area. English and French settlers arrived in the mid-1600s and established posts to trade with the local Native American tribes. As the European settlers developed the marshland, however, the tribes were pushed from the area.

Georgetown County was founded in 1729, by which point Georgetown had become an active port with trade ships traveling inland along the rivers and across the Atlantic to Europe. The merchant ships made easy targets for pirates who hid among the barrier islands off the coast. The famous pirate ship, the “Jolly Roger,” carried over 2,000 pirates along the coast to raid trade ships laden with goods.

One of Georgetown’s early industries was production of naval stores, including pitch, turpentine, rosin, and timber. However, market demand from England encouraged a shift in the local industry, from naval stores to indigo. Residents cleared land for indigo plantations, which brought great wealth to the region. Towards the end of the 1700s, indigo became less profitable due to competition from suppliers in India and the East Indies, and Georgetown farmers shifted their focus to rice production. For a century, rice sustained the Georgetown economy and residents of Georgetown became accustomed to fine living. The tradition of luxury contributed to the rise of America’s first resorts, including Pawley’s Island and Litchfield Beach. Today, these areas boast the historic homes of wealthy plantation owners.

After the Civil War, the emancipation of the plantation slaves, as well as several destructive hurricanes, resulted in the decline of the rice industry. The region turned instead to tourism, hosting the rich and powerful who were attracted to its hunting preserves.

Again in the 1900s, Georgetown’s economy witnessed a revitalization of the lumber and turpentine industry. The largest paper mill in the world was built in the 1930s and the paper industry, with its cultivated forests, continues to be an important contributor to Georgetown’s economy. In the mid-1900s, steel mills were opened in Georgetown, which still operate today. The introduction of rail and highway infrastructure also encouraged the development of Georgetown’s tourism industry by making the resort communities more accessible (Coastal Guide, 2004; Georgetown County Museum, 2007; Georgetown County, South Carolina, 2008).

Georgetown County hosts several annual events. They include: the Pawleys Island Festival of Music and Art, Annual Plantation Tours, Winyah Bay Heritage Festival, and Georgetown Wooden Boat Festival (South Carolina’s Information Highway, 2012).

5. Coastal Amenities

Georgetown County has approximately 40 miles of shoreline along the Atlantic Ocean (Google, Inc., 2012). Most of the beachfront has been developed—the County has 35 miles of beaches, although a few coastal areas are being preserved as habitat for migratory birds (Georgetown County Economic Development Commission, 2011b). Preserved lands include the Huntington Beach State Park and Tom Yawkey Wildlife Center Heritage Preserve (Georgetown County Tourism Management Commission, 2012; South Carolina Department of Natural Resources, 2007). Georgetown County also includes part of the Waccamaw National Wildlife Refuge, a federally protected area whose total area is 22,931 acres (U.S. Fish and Wildlife Service, 2012). There are three public beaches, eight marinas, and seven yacht clubs in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009).

6. General Economic Situation

The U.S. Census Bureau lists 1,837 business establishments in Georgetown County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Georgetown Hospital Systems, Georgetown County Department of Education, International Paper Company, and Georgetown County Government. As the largest employer, the Georgetown Hospital System supports 1,600 employees (Georgetown County Economic Development Commission, 2011a).

7. Coastal Tourism/Recreation Activity

Tourism in Georgetown County has many dimensions. Tourists can tour the downtown of the Port of Georgetown, with its many historic landmarks and venues for shopping and dining. They can explore the undeveloped rivers and marshes of inland Georgetown County. The rivers provide an ideal environment for boating and fishing. Alternatively, the barrier islands and “Grand Strand” beaches allow visitors to enjoy the sun and surf of South Carolina’s coast. The coast has long been a destination for tourists and most of the coast is now developed. In addition to its beaches, visitors can golf on Georgetown’s coastal courses, many of which are located on former plantation estates (Georgetown County Tourism Management Commission, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 97.90 percent of the ocean-related jobs in Georgetown County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$258.53 million in Georgetown County, generating \$49.32 million in payroll income and supporting 2,900 jobs (South Carolina Department of Parks, Recreation and Tourism, 2011). There are 208 establishments dedicated to leisure and hospitality in Georgetown County; the average weekly wage for employees of these establishments is \$314. Leisure and hospitality employment in Georgetown County increased by 1,336 jobs, or 43.53 percent, from winter to summer in 2010, reflecting the somewhat seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 61.73 percent of ocean recreation and tourism-related businesses in Georgetown County are small (U.S. Census Bureau, 2009).²

In 2009, 199 ocean-related establishments directly employed 3,147 people in Georgetown County. These numbers reflected an increase from 2000, when 123 establishments employed 2,181 people. From 2000 to 2009, the number of ocean-related establishments grew by 61.8 percent and the number

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

of people employed by these establishments grew by 44.3 percent (National Ocean Economics Program, 2012).

There are 15 hotels, five bed and breakfasts, and two campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed \$1,262,833 in lodging tax revenue, which includes taxes on campgrounds (South Carolina State Treasurer's Office, 2011). Approximately 15.2 percent of the housing units in Georgetown County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the amusement, gambling, and other recreation industry and the hotel industry. The industries associated with water sightseeing, marinas, and boat dealers also provide employment in Georgetown. The data indicate that employment levels have not changed substantially since 2005, but for most industries employment increases in the summer months, indicating the importance of seasonal visitors.

Exhibit 5. Georgetown County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	4	11	8	-**
Marinas (713930)	47	90	71	-**
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	16	21	19	-**
Renting Pleasure Boats (532292)	-	-	-	-^
Land-Based				
Hotel Employment (72111)	318	467	397	-2.2%
Restaurant Employment (7221 & 7222)	1,929	2,874	2,424	-5.3%
Amusement, Gambling, Other Recreation (713)	743	571	650	4.7%
General Tourism				
Travel Agencies (561510)	0	0	0	0%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Horry County, South Carolina

1. Synopsis

Horry County is located on the northeasternmost portion of South Carolina’s Atlantic Coast. The County is known for its seaside resort communities and “Grand Strand” beaches. Horry is comprised of three major cities—Conway, Myrtle Beach, and North Myrtle Beach—as well as six smaller cities and towns and numerous unincorporated areas. Approximately 269,000 people reside in Horry County, which has a population density and a housing density above the State average (U.S. Census Bureau, 2010). The County’s economy depends on tourism, retail, and construction.

Tourism represents a significant portion of the ocean economy in Horry County. In 2009, 808 ocean-related establishments directly employed 21,008 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 99.60 percent of the ocean-related jobs in Horry County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Just over half—55.98 percent—of the ocean recreation and tourism-related businesses in Horry County are small (U.S. Census Bureau, 2009).¹

2. Location

Horry County, shown in Exhibit 1, is located on the northeasternmost portion of South Carolina’s Atlantic Coast. Adjacent counties include Georgetown County (to the southwest), Marion County (to the west), and Dillon County (to the northwest) in South Carolina and Columbus County (to the northeast) and Brunswick County (to the east) in North Carolina (Google, Inc., 2012). The County has 1,134 square miles of land and 35 miles of shoreline along the Atlantic Ocean (Titus, 2009; U.S. Census Bureau, 2010).

Exhibit 1. Map of Horry County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Horry County is accessible by car, plane, and bus. Numerous major roadways serve Horry County, including six U.S. Highways and 12 South Carolina State Highways. Tourists traveling by plane can land at the Myrtle Beach International Airport (Google, Inc., 2012). The Grand Strand Airport-North Myrtle

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Beach provides facilities for private aircraft. Other airports available for public use include the Conway-Horry Airport and Loris-Twin Cities Airport (Horry County Department of Airports, 2010). The County operates a bus system with 15 regional routes (Waccamaw Regional Transportation Authority, 2012).

3. Demographics

Horry County has a year-round population of 269,291 (U.S. Census Bureau, 2010). The following three tables profile Horry County's population. As Exhibit 2 shows, at 37.0 percent, population growth in Horry County more than doubled the State population growth (15.3 percent) over the past decade.

Exhibit 2. Population Profile

	Horry	South Carolina
Year-Round Population	269,291	4,012,012
Population Change (2000-2010)	37.0%	15.3%
Median Age (Years)	41.1	37.9
Percent Female	51.1%	51.4%
Percent Foreign Born	6.7%	4.7%
<i>Ethnic Profile</i>		
White	79.9%	66.2%
Black/African American	13.4%	27.9%
Asian	1.0%	1.3%
Hispanic/Latino	6.2%	5.1%
American Indian	0.5%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Horry	South Carolina
Unemployment Rate	8.6%	10.8%
Percent Out of Labor Force	37.0%	35.6%
Median Household Income	\$43,142	\$43,939
Percent of Pop. Below Poverty Line	16.1%	15.3%
<i>Educational Attainment</i>		
High School Diploma	34.2%	30.5%
Bachelor's Degree	14.2%	15.6%
Graduate/Professional Degree	7.6%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Horry	South Carolina
Population Density (people/sq. mile)	237.5	153.9
Housing Density (structures/sq. mile)	164.0	71.1
Housing Structures that are Independent Units	45.6%	62.2%
Occupied Units	60.3%	84.3%
Properties for Seasonal, Rec. or Occasional Use	26.8%	5.3%
Median House Value	\$170,100	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to European settlement, Horry County was inhabited by the Waccamaw and Chicora tribes. Conflict with the European settlers led to war in the mid-1700s and eventually drove the Waccamaw out of South Carolina to their present-day home near Wilmington, North Carolina. Descendants of the Chicora tribe still live in present-day Conway in Horry County (Waccamaw Siouan Tribe, 2011).

After King Charles II of England granted the Carolinas to colonial proprietors in 1663, surveyors were sent to South Carolina to establish townships. Kingston Township in Horry County was one of those original settlements. Kingston was settled by fur traders and adventurers, as well as immigrants seeking religious freedom. Other communities developed along the coast, with an economy based on fur trading, fishing, farming, and naval stores production. In the 1700s and early 1800s, farmers produced indigo and cotton on coastal plantations. The naval stores industry also grew, taking advantage of the abundant natural resources to produce pitch, tar, and turpentine. However, these resources were eventually depleted and the naval stores industry declined in the late 1800s. The economy shifted to tobacco farming in the 1890s.

Horry County was created with its present boundaries in 1785. It was named Horry District in 1801 and renamed Horry County in 1868.

In both the American Revolution and Civil War, Horry County was torn by divided loyalties. Several Revolutionary battles were fought in Horry—the County was named in honor of Revolutionary War hero Peter Horry who helped to drive British troops out of the area. Kingston Township, one of Horry's original settlements, was renamed Conway after another Revolutionary War figure, Robert Conway. During the Civil War, Horry experienced tension between residents that subscribed to three different philosophical camps: the Secessionists, Unionists, and Cooperationists. It also sent about 90 percent of its white male population to war.

After the Civil War, Horry County recovered economically with the introduction of rail infrastructure, which facilitated trade of cash crops. The introduction of rail infrastructure also coincided with the construction of Horry's first coastal hotel in present-day Myrtle Beach. Myrtle Beach developed into a popular family resort in the early 1900s, known for quaint seaside cottages and small hotels. The automobile, introduced in the early 1900s, and the region's electrification further encouraged coastal development. After destruction by Hurricane Hazel in the 1950s, the Grand Strand area was rebuilt, this time with large hotels and golf courses. Today, Myrtle Beach is the fourth fastest growing area in the nation, attracting millions of tourists each year.

Horry County also felt the impact of World Wars I and II. German submarines patrolled the waters off the Atlantic coast during both wars. The Federal Government constructed the Intracoastal Waterway to provide safe passage for U.S. ships. Land around the Waterway in Horry County was also used as a bombing range and pilot training area. During World War II, German prisoners of war were held at Myrtle Beach (Brosky, 2012; Horry County Board of Architectural Review, 2012; Horry County Historical Society, 2011).

Today, Horry County's economy depends on tourism, retail, and construction (Brosky, 2012; Clemson Institute for Economic and Community Development, 2008).

Horry County hosts several annual events. They include: Fish and Grits Festival, Blue Crab Festival, Bluegrass on the Waccamaw Festival, South Carolina State Bluegrass Festival, and Beach, Boogie, and BBQ Festival (South Carolina's Information Highway, 2012).

5. Coastal Amenities

Horry County has 35 miles of shoreline along the Atlantic Ocean that, together with the Georgetown County shoreline, forms South Carolina's "Grand Strand" (Titus, 2009). The Grand Strand, including Horry's Myrtle Beach, is a popular tourist and retirement destination. There are 10 public beaches, nine marinas, and 12 yacht clubs in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). Horry County's landscape is diverse. Beyond the beaches lie rivers, forests, and swamps (Brosky, 2012). Horry includes part of the federally protected Waccamaw National Wildlife Refuge, whose total area is 22,931 acres, as well as two heritage preserves and Myrtle Beach State Park (Coastal Travel Guide, 2012; U.S. Fish and Wildlife Service, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 8,418 business establishments in Horry County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Horry County, which supported 4,870 employees in 2011, School District and Wal-Mart, which supported 2,061 (Horry County Finance Department, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Horry County is centered on its shorefront, with sandy beaches, large hotels, amusement parks, and golf courses, including the historic Pine Lakes International Country Club known as "The Granddaddy." Myrtle Beach, in particular, is a popular coastal destination in Horry County.

In addition to its beachfront attractions, Horry offers visitors urban entertainment, including art galleries, history museums, theater, and shopping. The Carolina Bays and Waccamaw River attract those interested in nature-oriented tourism (Horry County Board of Architectural Review, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 99.60 percent of the ocean-related jobs in Horry County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$3.09 billion in Horry County, generating \$612.14 million in payroll income and supporting 36,580 jobs (South Carolina Department of Parks, Recreation and Tourism, 2011). Horry County hosts about 12 million visitors per year (Horry County Board of Architectural Review, 2012). There are 1,288 establishments dedicated to leisure and hospitality in Horry County; the average weekly wage for employees of these establishments is \$331. Leisure and hospitality employment in Horry County increased by 13,164 jobs, or 52.32 percent, from winter to summer in 2010, reflecting the seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 55.98 percent of ocean recreation and tourism-related businesses in Horry County are small (U.S. Census Bureau, 2009).²

In 2009, 808 ocean-related establishments directly employed 21,008 people in Horry County. These numbers reflected a change from 2000, when 1,008 establishments employed 17,126 people. From 2000 to 2009, the number of ocean-related establishments decreased by 19.8 percent; however, the number of people employed by these establishments grew by 22.7 percent (National Ocean Economics Program, 2012).

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

There are 208 hotels, five bed and breakfasts, and eight campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed \$13,538,412 in lodging tax revenue, which includes taxes on campgrounds (South Carolina State Treasurer's Office, 2011). Horry County receives about 12 million visitors each year. Approximately 26.8 percent of the housing units in Horry County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry and the amusement, gambling, and other recreation industry. The industries associated with water sightseeing, marinas, pleasure boat rentals, travel agencies, and tour operators also provide employment. The data reflect the seasonal nature of these industries.

Exhibit 5. Horry County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	10	57	32	-13.5%
Marinas (713930)	46	67	57	-9.5%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	0	0	0	-100.0%
Renting Pleasure Boats (532292)	57	195	103	39.2%
Land-Based				
Hotel Employment (72111)	6,254	9,655	7,983	9.7%
Restaurant Employment (7221 & 7222)	13,329	20,162	16,725	3.8%
Amusement, Gambling, Other Recreation (713)	4,435	2,991	3,699	-11.4%
General Tourism				
Travel Agencies (561510)	0	64	59	-47.3%
Tour Operators (561520)	0	3	3	-83.3%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Myrtle Beach City, South Carolina

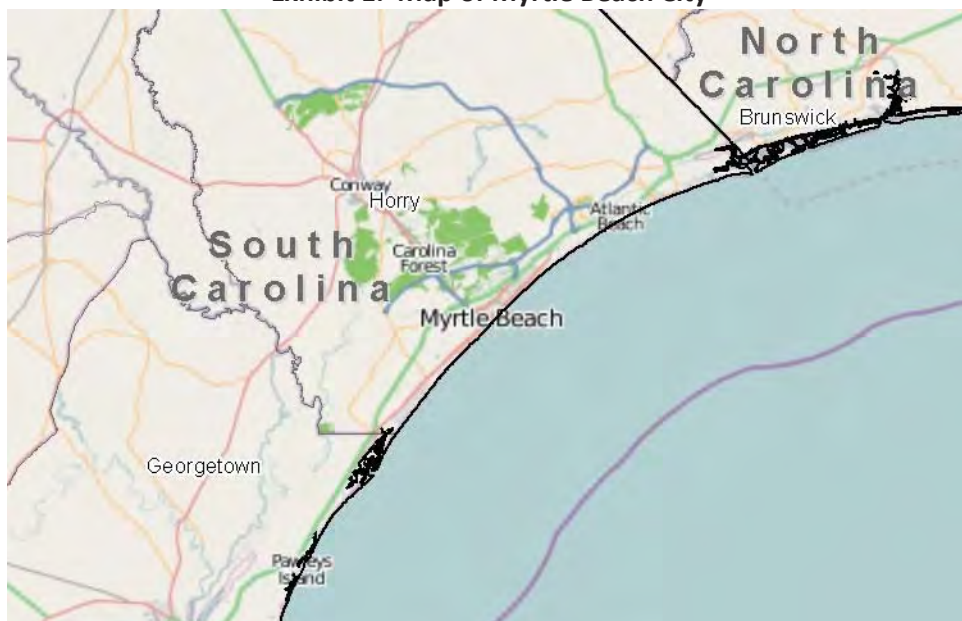
1. Synopsis

Myrtle Beach is a city located in Horry County on the northeastern portion South Carolina's Atlantic coast. Myrtle Beach City is known for its oceanfront resorts. About 27,000 people reside in Myrtle Beach, which has a population density of 1,162 people per square mile and a housing density of 998 units per square mile (U.S. Census Bureau, 2010). The tourism, hospitality, and health services sectors provide the economic base in Myrtle Beach. According to the 2009 U.S. Census County Business Patterns Survey, approximately 56.0 percent of ocean recreation and tourism-related businesses in Myrtle Beach are small (U.S. Census Bureau, 2009).¹

2. Location

Myrtle Beach City, shown in Exhibit 1, is a city located in Horry County on the northeastern portion South Carolina's Atlantic coast (Google, Inc., 2012). Myrtle Beach has 23 square miles of land and 60 miles of shoreline along the Atlantic Ocean (Myrtle Beach Area Conventions and Visitors Bureau, 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Myrtle Beach City



Source: ESRI, 2011 and OpenStreetMap, 2011.

Myrtle Beach is accessible by car, plane, and rail. Two major highways, U.S. Routes 17 and 501, serve the City (Google, Inc., 2012). The Myrtle Beach International Airport provides an entry point for those traveling by air; over 750,000 passengers travel through the airport each year (Horry County Department of Airports, 2006; Myrtle Beach Area Conventions and Visitors Bureau, 2012). Carolina Southern Railroad also services the Myrtle Beach area (Carolina Southern Railroad, 2012).

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

3. Demographics

Myrtle Beach has a year-round population of 27,109 (U.S. Census Bureau, 2010). The following three tables profile Myrtle Beach’s population. As Exhibit 2 shows, with the exception of housing density, the demographics of Myrtle Beach generally mirror those of the State of South Carolina. The population in Myrtle Beach grew by 19.1 percent over the past decade; the population of South Carolina grew by 15.3 percent over the same time period.

Exhibit 2. Population Profile

	Myrtle Beach	South Carolina
Year-Round Population	27,109	4,012,012
Population Change (2000-2010)	19.1%	15.3%
Median Age (years)	39.2	37.9
Percent Female	49.2%	51.4%
Percent Foreign Born	16.3%	4.7%
<i>Ethnic Profile</i>		
White	72.3%	66.2%
Black/African American	13.9%	27.9%
Asian	1.5%	1.3%
Hispanic/Latino	13.7%	5.1%
American Indian	0.7%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Myrtle Beach	South Carolina
Unemployment Rate	7.8%	10.8%
Percent Out of Labor Force	31.0%	35.6%
Median Household Income	\$37,669	\$43,939
Percent of Population Below Poverty Line	21.4%	15.3%
<i>Educational Attainment</i>		
High School Diploma	34.6%	30.5%
Bachelor’s Degree	17.0%	15.6%
Graduate/Professional Degree	8.0%	8.6%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Myrtle Beach	South Carolina
Population Density (people/sq. mile)	1,162.3	153.9
Housing Density (structures/sq. mile)	997.5	71.1
Housing Structures that Are Independent Units	30.4%	62.2%
Occupied Units	58.9%	84.3%
Properties for Seasonal, Rec. or Occasional Use	3.5%	5.3%
Median House Value	\$171,400	\$134,100

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to European settlement, the Waccamaw tribe lived in the area around present-day Myrtle Beach.

The first European settlers established a community in the area in the late 1700s. A plantation economy developed based on production of indigo and tobacco. However, the sandy soil made farming challenging. The shoreline itself was not inhabited, although some of the early land grants included the coast and barrier islands; it was considered remote from society.

In 1900, the Conway and Seashore Railroad began operating, carrying timber from the forested coast to customers inland. A community was established along the coast and timber and rail employees would travel to the beach on weekends. The end of the railroad was dubbed “New Town;” the railroad developer imagined it as a beach resort. The idea was realized by his son, who opened the Seaside Inn in 1901. New Town was incorporated in 1957 and named Myrtle Beach, after the local Southern Wax Myrtle plant.

Myrtle Beach was separated from mainland South Carolina when the Intracoastal Waterway was created in 1936. Due to this separation, the development has been unequal on the two sides of the Waterway, with the eastern side becoming more highly developed.

The U.S. Army Air Corps established a military base in Myrtle Beach in 1940. Commercial flight shared the runway beginning in 1976. Since 1993, the base has been a commercial airport, named Myrtle Beach International Airport.

Today, Myrtle Beach is a popular tourist destination. National Geographic ranked the new Myrtle Beach Boardwalk as the third best boardwalk in the nation. Myrtle Beach is also the site of a growing retirement community. The tourism, hospitality, and health services sectors provide the economic base in Myrtle Beach (Brosky, 2012; City of Myrtle Beach, 2010; Myrtle Beach Area Conventions and Visitors Bureau, 2012).

Myrtle Beach hosts several annual events, including the Canadian-American Days Festival, Sun Fun Festival, Beach Boogie & BBQ Festival, and Grand Strand Fishing Rodeo (Myrtle Beach Area Conventions and Visitors Bureau, 2012).

5. Coastal Amenities

Myrtle Beach has 60 miles of shoreline (Myrtle Beach Area Conventions and Visitors Bureau, 2012). The coast is highly developed, with a long stretch of public beach. According to the 2009 U.S. Census County Business Patterns Survey, the Myrtle Beach-Conway-North Myrtle Beach Metropolitan Statistical Area has nine marinas and two yacht clubs (U.S. Census Bureau, 2009). There are no national parks or wildlife refuges and no federally protected land in the area (Google, Inc., 2012).

6. General Economic Situation

The U.S. Census Bureau lists 8,418 business establishments in Myrtle Beach in 2009 (U.S. Census Bureau, 2009). The largest employers in the Myrtle Beach Metropolitan Statistical Area are: the Horry County School District, Wal-Mart, the Grand Strand Regional Medical Center, and Coastal Carolina University (Myrtle Beach Regional Economic Development Corporation, 2011).. However, half of all employment in the area is supported by the tourism and retail sectors. Thus, the region depends on a healthy consumer base (Myrtle Beach Regional Economic Development Corporation, 2012).

7. Coastal Tourism/Recreation Activity

Myrtle Beach is ideal for tourists who seek a destination with oceanfront resorts, amusement parks, water sports, golf courses, and sandy beaches. The coast is highly developed, with a multitude of lodging

and entertainment options. Tourists can take part in urban activities like shopping and dining, as well as coastal activities like deepsea fishing, scuba diving, windsurfing, swimming, and sunbathing (Myrtle Beach Area Conventions and Visitors Bureau, 2012).

There are 1,410 establishments dedicated to leisure and hospitality in the Myrtle Beach-Conway-North Myrtle Beach Metropolitan Statistical Area, with an annual average employment of 27,867 people (U.S. Census Bureau, 2009). Myrtle Beach is part of the “Grand Strand,” a stretch of beach that includes the shoreline of Horry County and Georgetown County. Tourism in the Grand Strand has an economic impact of about \$6.5 billion and supports approximately 74,600 jobs in the Grand Strand local area, with about 14.6 million visitors each summer (South Carolina Department of Parks, Recreation and Tourism, 2012). According to the 2009 U.S. Census County Business Patterns Survey, approximately 56.0 percent of ocean recreation and tourism-related businesses in Myrtle Beach are small (U.S. Census Bureau, 2009).²

In the larger area of Horry County, 808 ocean-related establishments directly employed 21,008 people in 2009. These numbers reflected a change from 2000, when 1,008 establishments employed 17,126 people. From 2000 to 2009, the number of ocean-related establishments decreased by 19.8 percent; however, the number of people employed by these establishments grew by 22.7 percent (National Ocean Economics Program, 2012).

There are over 425 hotels, two bed and breakfasts, and 12 campgrounds in Myrtle Beach (Myrtle Beach Area Conventions and Visitors Bureau, 2012; U.S. Census Bureau, 2009). In 2011, the State of South Carolina collected \$7,419,900 in accommodations taxes from the accommodations and tourism industry in the City of Myrtle Beach; of that total, \$6,728,035 was allocated back to the City. The change in the City’s net assets due to local accommodations tax revenue was \$2,064,510 in the same year (City of Myrtle Beach Finance Department, 2011).. Approximately 3.5 percent of the housing units in Myrtle Beach are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

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Accomack County, Virginia

1. Synopsis

Accomack County is located on the Delmarva Peninsula at Virginia's northern border. Together with Northampton County, it is known as Virginia's Eastern Shore. The County is known for its rural lifestyle, fresh produce and seafood, and undeveloped beaches. Accomack is comprised of 14 towns with a total population of about 33,000 people (U.S. Census Bureau, 2010). The County's economy depends on poultry processing industry and the health care sector.

Tourism represents a large portion of the ocean economy in Accomack County. In 2009, 117 ocean-related establishments directly employed 1,108 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 89.90 percent of the ocean-related jobs in Accomack County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). The majority—81.82 percent—of the ocean recreation and tourism-related businesses in Accomack County are small (U.S. Census Bureau, 2009).¹

2. Location

Accomack County, shown in Exhibit 1, is located on the Delmarva Peninsula at Virginia's northern border. Adjacent counties include Somerset, Worcester, Northampton, Middlesex, Lancaster, and Northumberland Counties (Google, Inc., 2012). The County has 450 square miles of land and a length of approximately 40 miles, with shoreline on both the Chesapeake Bay and Atlantic Ocean (Google, Inc., 2012; U.S. Census Bureau, 2010).

Exhibit 1. Map of Accomack County



Source: ESRI, 2011 and OpenStreetMap, 2011.

Accomack County is accessible by car, bus, plane, and train. U.S. Route 13 and Virginia Route 316 bisect Accomack from north to south. Other highways, such as Virginia Route 180, cross the County from east to west (Google, Inc., 2012). The Accomack-Northampton Transportation District Commission operates public bus routes through the Delmarva Peninsula. Greyhound Bus also has a station on the Peninsula

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

(Virginia Department of Rail and Public Transportation, 2011). The Accomack County Airport provides aircraft facilities for public use. Accomack County is served by the Eastern Shore Railroad with interchanges with the Norfolk Southern Rail (Virginia Tech, 2007).

3. Demographics

Accomack County has a year-round population of 33,164 (U.S. Census Bureau, 2010). The following three tables profile Accomack County's population. As Exhibit 2 shows, the population in Accomack County has declined significantly over the past decade, with a decrease of 13.4 percent. This contrasts with the State population growth of 13 percent over the same time period.

Exhibit 2. Population Profile

	Accomack	Virginia
Year-Round Population	33,164	7,078,515
Population Change (2000-2010)	-13.4%	13.0%
Median Age (Years)	44.7	37.4
Percent Female	51.3%	50.9%
Percent Foreign Born	6.0%	10.8%
<i>Ethnic Profile</i>		
White	65.3%	68.6%
Black/African American	28.1%	19.4%
Asian	0.6%	5.5%
Hispanic/Latino	8.6%	7.9%
American Indian	0.4%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Accomack	Virginia
Unemployment Rate	9.2%	7.9%
Percent Out of Labor Force	40.0%	33.3%
Median Household Income	\$41,372	\$61,090
Percent of Pop. Below Poverty Line	15.6%	10.7%
<i>Educational Attainment</i>		
High School Diploma	37.9%	25.3%
Bachelor's Degree	10.3%	19.9%
Graduate/Professional Degree	7.7%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Accomack	Virginia
Population Density (people/sq. mile)	73.8	202.6
Housing Density (structures/sq. mile)	46.7	85.2
Housing Structures that are Independent Units	71.8%	62.6%
Occupied Units	65.7%	89.7%
Properties for Seasonal, Rec. or Occasional Use	23.0%	2.4%
Median House Value	\$149,800	\$256,600

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

English explorers first landed in present-day Accomack County in 1603 and encountered the Accawmacke tribe. The Accawmacke chief, Debedeavon, allied with the English and granted them tracts of land. One of the original eight shires of Virginia, Accomac shire was founded in 1634, renamed by the English as Northampton in 1642. When Northampton was split in 1663, the northern section reverted to the original name, Accomac, derived from the Native American word for “on the other side.”

Accomack attracted settlers with its flat land and fertile soil. Its economy developed around the production of agricultural crops, such as vegetables and grains. Residents also harvested oysters, clams, crabs, and fish from the tidal flats along the shore. The farmers and watermen traded their products with markets in nearby Baltimore, Philadelphia, and Norfolk, easily accessible through the Bay and along the Atlantic coast.

As a result of the coastal trade, communities grew along Accomack’s waterfront. The introduction of rail infrastructure in the late 1800s enabled inland trade as well. The railroads brought greater prosperity to area. Accomack became a top producer of potatoes in Virginia in the early 1900s, along with its neighbor, Northampton County. The two counties were some of the most prosperous agricultural communities in the United States (Eastern Shore of Virginia Tourism, 2012).

Today, Accomack remains a largely rural area, with the largest number of employees in the manufacturing, health care, and retail sectors. Poultry processing, in particular, is the County’s primary industry, followed by vegetable and melon farming. These industries are subject to economic swings given rising feed costs and land use competition with other agricultural products. The growth of the health care sector, encouraged by the immigration of retirees to the area, helps to provide a buffer against economic volatility. The largest growing industry, however, is tourism centered on the County’s coastline (Virginia Tech, 2007).

Accomack County hosts several annual events, including the Easter Decoy and Art Festival on Chincoteague Island, Daffodil Festival, Hog Bash, Blueberry Festival, and Harborfest at Onancock (Eastern Shore of Virginia Tourism, 2012).

5. Coastal Amenities

Accomack County has a length of approximately 40 miles, with shoreline on both the Atlantic Ocean (to the east) and the Chesapeake Bay (to the west) (Google, Inc., 2012). The western coastline traces the Chesapeake Bay and its many tributaries; the eastern side borders the Atlantic Ocean, with numerous barrier islands, bays, and inlets (Google, Inc., 2012). The area is made up primarily of farmland, marshes, and small towns (Virginia Tech, 2007). There are eight public beaches and one yacht club in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). The County also maintains 28 public boating access sites (Accomack County, 2012). Several national parks and refuges are located in Accomack County: Wallops Island National Wildlife Refuge (373 acres) and parts of Assateague Island National Seashore (39,630 acres in Worcester County, Maryland and Accomack County, Virginia), Chincoteague National Wildlife Refuge (14,000 acres), and Martin National Wildlife Refuge (4,548 acres in Somerset County, Maryland and Accomack County, Virginia) (Coastal Travel Guide, 2012; Eastern Shore of Virginia Tourism, 2012; U.S. National Park Service, 2012; U.S. Fish and Wildlife Service, 2012).

Tangier Island is a distinct coastal landmark in Accomack County. Accessible only by boat, it is a working waterman’s village, with undeveloped beaches, in the Chesapeake Bay (Eastern Shore of Virginia Tourism, 2012).

6. General Economic Situation

The U.S. Census Bureau lists 818 business establishments in Accomack County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: Perdue Farms and Tyson's Foods, both of which employ over 1,000 people (Accomack County Central Accounting Office, 2011).

7. Coastal Tourism/Recreation Activity

Tourism in Accomack County focuses on several key areas: nature tourism, agri-tourism, and beach and recreational resorts. The County Government describes Accomack as a "prime destination for those looking for quiet villages, hunting, fishing, beaches, and friendly welcoming people." Accomack is a largely rural area, offering tourists nature refuges and many undeveloped islands and beaches to explore (Accomack County, 2012). Visitors can cross a bridge to Chincoteague Island in the Atlantic or take a boat to the Chesapeake's Tangier Island, a car-free community with a simple lifestyle. Visitors can stay in local bed and breakfasts and observe the watermen working in the Bay, in an experience described as "stepping back in time." In addition to its exploring its quiet coastline, tourists can enjoy other outdoor activities, including wine touring, biking, horseback riding, birdwatching, and golfing. They can also visit Accomack's local farms for fresh pick-your-own produce (Eastern Shore of Virginia Tourism, 2012).

According to the National Oceanic and Atmospheric Administration, an estimated 89.90 percent of the ocean-related jobs in Accomack County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$145.08 million in Accomack County, generating \$31.39 million in payroll income and supporting 1,850 jobs (Virginia Tourism Corporation, 2011). There are 116 establishments dedicated to leisure and hospitality in Accomack County; the average weekly wage for employees of these establishments is \$258. Leisure and hospitality employment in Accomack County increased by 628 jobs, or 64.94 percent, from winter to summer in 2010, reflecting the seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 81.82 percent of ocean recreation and tourism-related businesses in Accomack County are small (U.S. Census Bureau, 2009).²

In 2009, 117 ocean-related establishments directly employed 1,108 people in Accomack County. These numbers reflect an increase from 2000, when 67 establishments employed 714 people. From 2000 to 2009, the number of ocean-related establishments grew by 74.6 percent and the number of people employed by these establishments grew by 55.2 percent (National Ocean Economics Program, 2012).

There are 20 hotels, nine bed and breakfasts, and eight campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In 2011, visitor accommodations gross \$4 34,054 in hotel and motel room tax revenue (Accomack County Central Accounting Office, 2011). Approximately 23.0 percent of the housing units in Accomack County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry. The industries associated with

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

marinas and boat dealers also provide employment. The data reflect the seasonal nature of these industries.

Exhibit 5. Accomack County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	0	10	7	-**
Boat Building and Repair (336612)	-	-	-	-^
Boat Dealers (441222)	18	10	0	-100.0%
Renting Pleasure Boats (532292)	0	0	0	0%
Land-Based				
Hotel Employment (72111)	185	271	222	4.2%
Restaurant Employment (7221 & 7222)	388	1,001	798	-8.0%
Amusement, Gambling, Other Recreation (713)	0	0	0	-100.0%
General Tourism				
Travel Agencies (561510)	-	-	-	-^
Tour Operators (561520)	-	-	-	-^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	-^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

^No percent change calculated because either 2010 or 2005 data unavailable.

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Northampton County, Virginia

1. Synopsis

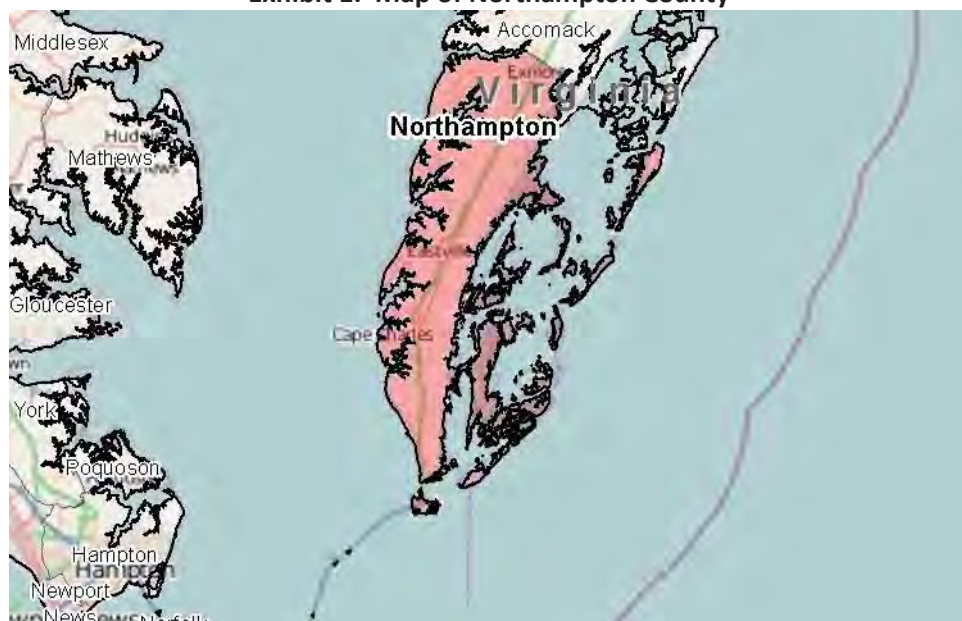
Northampton County is located on the southern end of the Delmarva Peninsula in Virginia. Together with Accomack County, it is known as Virginia's Eastern Shore. The County is known for its undeveloped coastal landscapes, including its many barrier islands. Northampton is comprised of five incorporated towns and has a total population of about 12,400 people. The County has a population density of 59 people per square mile and a housing density of 35 units per square mile (Northampton County Chamber, 2007; U.S. Census Bureau, 2010). The County's economy depends on tourism, retail, poultry processing, and agriculture.

Tourism represents a large portion of the ocean economy in Northampton County, although tourism is less significant in Northampton County than in neighboring coastal counties. In 2009, 59 ocean-related establishments directly employed 608 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 60.9 percent of the ocean-related jobs in Northampton County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 60 percent of ocean recreation and tourism-related businesses in Northampton County are small (U.S. Census Bureau, 2009).¹

2. Location

Northampton County, shown in Exhibit 1, is located on the southern end of the Delmarva Peninsula in Virginia. Adjacent counties include Accomack County (to the north) and Virginia Beach (to the south) (Google, Inc., 2012). The County has 357 square miles of land and over 100 miles of shoreline on the Chesapeake Bay and Atlantic Ocean (Eastern Shore of Virginia Chamber of Commerce, 2012; Google, Inc., 2012).

Exhibit 1. Map of Northampton County



¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Source: ESRI, 2011 and OpenStreetMap, 2011.

Northampton County is primarily accessible by car. U.S. Route 13 and Virginia Route 600 bisect Northampton from north to south (Google, Inc., 2012). The Chesapeake Bay Bridge connects Northampton County to Virginia Beach on Virginia’s mainland, spanning a distance of 17.5 miles. The Eastern Shore Railroad operates tracks in Northampton County (Northampton County Chamber, 2007). Bus and plane infrastructure also exists. The Northampton-Northampton Transportation District Commission operates public bus routes through the Delmarva Peninsula. Greyhound Bus also has a station on the Peninsula (Virginia Department of Rail and Public Transportation, 2011). The nearest major airport is Norfolk International (Google, Inc., 2012).

3. Demographics

Northampton County has a year-round population of 12,389 (U.S. Census Bureau, 2010). The following three tables profile Northampton County’s population. As Exhibit 2 shows, the population in Northampton County has declined over the past decade.

Exhibit 2. Population Profile

	Northampton	Virginia
Year-Round Population	12,389	7,078,515
Population Change (2000-2010)	-5.4%	13.0%
Median Age (Years)	47.8	37.4
Percent Female	52.1%	50.9%
Percent Foreign Born	6.0%	10.8%
<i>Ethnic Profile</i>		
White	57.9%	68.6%
Black/African American	36.5%	19.4%
Asian	0.7%	5.5%
Hispanic/Latino	7.1%	7.9%
American Indian	0.2%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Northampton	Virginia
Unemployment Rate	5.6%	7.9%
Percent Out of Labor Force	41.7%	33.3%
Median Household Income	\$35,760	\$61,090
Percent of Pop. Below Poverty Line	18.6%	10.7%
<i>Educational Attainment</i>		
High School Diploma	36.0%	25.3%
Bachelor's Degree	11.8%	19.9%
Graduate/Professional Degree	7.0%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Northampton	Virginia
Population Density (people/sq. mile)	58.5	202.6
Housing Density (structures/sq. mile)	34.5	85.2
Housing Structures that are Independent Units	81.1%	62.6%
Occupied Units	72.9%	89.7%
Properties for Seasonal, Rec. or Occasional Use	13.8%	2.4%
Median House Value	\$199,600	\$256,600

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Northampton County was first settled by Europeans in the early 1600s. The Accawmacke tribe, led by Chief Debedeavon, lived in the area at that time. Debedeavon allied with the English settlers and granted the settlers tracts of land (Northampton County Chamber of Commerce, 2007).

Present-day Northampton County was part of one of the original eight shires of Virginia, founded in 1634, and renamed Northampton in 1642. The shire of Northampton was split in 1663 and the southern portion became today's Northampton County.

Northampton attracted settlers with its flat land and fertile soil. Its economy developed around the production of agricultural crops, such as vegetables and grains. Residents also harvested oysters, clams, crabs, and fish from the tidal flats along the shore. The farmers and watermen traded their products with markets in nearby Baltimore, Philadelphia, and Norfolk, easily accessible through the Bay and along the Atlantic coast.

As a result of coastal trade, communities grew along Northampton's waterfront. The introduction of rail infrastructure in the late 1800s enabled inland trade as well and brought greater prosperity to area. Northampton became a top producer of potatoes in Virginia in the early 1900s, along with its neighbor, Accomack County. The two counties were some of the most prosperous agricultural communities in the United States (Eastern Shore of Virginia Chamber of Commerce, 2012; Eastern Shore of Virginia Tourism, 2012; Town of Cape Charles, 2011).

Northampton County has a reputation as a home for free African Americans during the era of slavery. Free blacks resided in Northampton as early as 1662 (Go Delmarva, 2012).

Today, Northampton remains a largely rural area. Tourism and retail are important to the local economy; the most common occupation in the Eastern Shore in 2010 was "cashier," reflecting high employment in these sectors. The second and third most common occupations are "meat, poultry, and fish cutters and trimmers" and "farmworkers and laborers." This reflects the contribution of the poultry processing and agricultural industries to Northampton County and the neighboring Accomack County (Northampton County Chamber, 2007).

Northampton County hosts several annual events, including the Lower Chesapeake Bay Black Drum Classic Fishing Tournament, Seafood Festival, Oyster Festival, Pirate and Wenches Ball, and Birding and Wildlife Festival (Northampton County Chamber, 2007; Town of Cape Charles, 2011).

5. Coastal Amenities

Northampton County is 35 miles long and has over 100 miles of shoreline on both the Chesapeake Bay (to the west) and the Atlantic Ocean (to the east) (Coastal Travel Guide, 2012; Google, Inc., 2012). The western coastline traces the Chesapeake Bay and its many tributaries; the eastern side borders the Atlantic Ocean, with numerous barrier islands, bays, and inlets. There are three public beaches and two marinas in the County (Northampton County Chamber of Commerce, 2007; U.S. Census Bureau, 2010). The County also includes two national parks—the Eastern Shore of Virginia National Wildlife Refuge (1,200 acres) and Fisherman Island National Wildlife Refuge (1,850 acres)—as well as state parks—Savage Neck Natural Area Preserve (298 acres) and Kiptopeke State Park (640 acres) (Eastern Shore of Virginia Chamber of Commerce, 2012; Northampton County Chamber of Commerce, 2007; Virginia Department of Conservation and Recreation, 2011).

6. General Economic Situation

The U.S. Census Bureau lists 338 business establishments in Northampton County in 2009 (U.S. Census Bureau, 2009). The largest employers in the County are: the Riverside Regional Medical Center and Northampton County Schools (Eastern Shore of Virginia Chamber of Commerce, 2012).

7. Coastal Tourism/Recreation Activity

Northampton County tourism focuses on the region's undeveloped coastal landscapes, including its wildlife refuges, beaches, and barrier islands, which have been designated as a United Nations International Biosphere Reserve. The barrier islands on Virginia's Eastern Shore represent the longest expanse of coastal wilderness on the nation's east coast. Tourists can enjoy the islands by hiking, birdwatching, swimming, and fishing. Eco-tour guides and boat captains are available to travel between the islands (Northampton County Chamber of Commerce, 2007).

According to the National Oceanic and Atmospheric Administration, an estimated 60.9 percent of the ocean-related jobs in Northampton County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$63.26 million in Northampton County, generating \$12.59 million in payroll income and supporting 750 jobs (Virginia Tourism Corporation, 2011). There are 43 establishments dedicated to leisure and hospitality in Northampton County, which provide seasonal employment. In 2010, the leisure and hospitality industry in Northampton County supported 382 jobs in the winter and no jobs in the summer, reflecting the seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, 60.0 percent of ocean recreation and tourism-related businesses in Northampton County are small (U.S. Census Bureau, 2009).²

In 2009, 59 ocean-related establishments directly employed 608 people in Northampton County. These numbers reflect a modest increase from 2000, when 48 establishments employed 597 people. From 2000 to 2009, the number of ocean-related establishments grew by 22.9 percent and the number of people employed by these establishments grew by 1.8 percent (National Ocean Economics Program, 2012).

There are nine hotels, five bed and breakfasts, and two campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). In Fiscal Year 2010-2011, visitor accommodations grossed

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

\$234,610 in lodging tax revenue (Northampton County Finance Department, 2011). Approximately 13.80 percent of the housing units in Northampton County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the hotel industry. The data reflect the seasonal nature of these industries.

Exhibit 5. Northampton County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	0	0	0	0%
Marinas (713930)	0	0	0	- [^]
Boat Building and Repair (336612)	-	-	-	- [^]
Boat Dealers (441222)	0	0	0	0%
Renting Pleasure Boats (532292)	-	-	-	- [^]
Land-Based				
Hotel Employment (72111)	63	89	77	- ^{**}
Restaurant Employment (7221 & 7222)	251	338	178	-48.4%
Amusement, Gambling, Other Recreation (713)	41	0	0	0%
General Tourism				
Travel Agencies (561510)	-	-	-	- [^]
Tour Operators (561520)	-	-	-	- [^]
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

**Percent change not calculated because a value of zero reported for 2005.

[^]No percent change calculated because either 2010 or 2005 data unavailable.

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Virginia Beach City, Virginia

1. Synopsis

Virginia Beach is an independent city located in the Hampton Roads area of southeastern Virginia. The City is known for being the landing site of the first English settlers and for its family-friendly beach. With a population of about 438,000 people, Virginia Beach ranks as the most populous city in Virginia. The City has a population density of 1,759 people per square mile and a housing density of 714 units per square mile (U.S. Census Bureau, 2010). The City's economy depends on real estate, defense, agribusiness, and tourism.

Tourism represents a significant portion of the ocean economy in Virginia Beach City. In 2009, 1,119 ocean-related establishments directly employed 19,382 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 96.70 percent of the ocean-related jobs in Virginia Beach City are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately half—56.98 percent—of the ocean recreation and tourism-related businesses in Virginia Beach City are small (U.S. Census Bureau, 2009).¹

2. Location

Virginia Beach, shown in Exhibit 1, is located in the Hampton Roads area of southeastern Virginia. It lies about 100 miles from Richmond and 200 miles from Washington, DC (Virginia Beach Convention and Visitors Bureau, 2012). Virginia Beach is adjacent to Chesapeake County (to the west), Norfolk County (to the northwest), and Northampton County (to the northeast) (Google, Inc., 2012). The City has 248 square miles of land and 38 miles of shoreline on the Chesapeake Bay and Atlantic Ocean (Virginia Beach Economic Development, 2011a).

Exhibit 1. Map of Virginia Beach City



Source: ESRI, 2011 and OpenStreetMap, 2011.

Virginia Beach is accessible by car, plane, bus, boat, and train. The Virginia Beach Convention and Visitors Bureau claims that “all roads lead to Virginia Beach” (Virginia Beach Convention and Visitors

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Bureau, 2012). Interstates I-664, I-64, and I-264 lead to the City, as do U.S. Routes 460, 58, 17, and 13 (Google, Inc., 2012). The famous 17.5-mile Chesapeake Bay Bridge Tunnel connects Virginia Beach to Virginia’s Eastern Shore. Visitors traveling by plane can arrive at Norfolk International Airport, which lies 20 minutes away from the oceanfront. Greyhound Bus services Virginia Beach and Amtrak trains arrive in neighboring Newport News. The Intracoastal Waterway begins in the Hampton Roads area, connecting Virginia Beach to other cities along the coast (Virginia Beach Convention and Visitors Bureau, 2012).

3. Demographics

Virginia Beach has a year-round population of 437,994 (U.S. Census Bureau, 2010). The following three tables profile Virginia Beach City’s population. As Exhibit 2 shows, the population in Virginia Beach has grown modestly (3 percent) over the past decade. This growth is less than the State-wide increase of 13.0 percent.

Exhibit 2. Population Profile

	Virginia Beach	Virginia
Year-Round Population	437,994	7,078,515
Population Change (2000-2010)	3.0%	13.0%
Median Age (years)	34.9	37.4
Percent Female	51.0%	50.9%
Percent Foreign Born	8.9%	10.8%
<i>Ethnic Profile</i>		
White	67.7%	68.6%
Black/African American	19.6%	19.4%
Asian	6.1%	5.5%
Hispanic/Latino	6.6%	7.9%
American Indian	0.4%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Virginia Beach	Virginia
Unemployment Rate	5.3%	7.9%
Percent Out of Labor Force	27.4%	33.3%
Median Household Income	\$64,618	\$61,090
Percent of Population Below Poverty Line	6.8%	10.7%
<i>Educational Attainment</i>		
High School Diploma	24.6%	25.3%
Bachelor’s Degree	21.0%	19.9%
Graduate/Professional Degree	10.9%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Virginia Beach	Virginia
Population Density (people/sq. mile)	1,758.9	202.6
Housing Density (structures/sq. mile)	714.3	85.2
Housing Structures that Are Independent Units	56.2%	62.6%
Occupied Units	92.8%	89.7%

Properties for Seasonal, Rec. or Occasional Use	2.0%	2.4%
Median House Value	\$277,400	\$256,600

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Prior to European settlement, the Chesepioc tribe lived in the area of present-day Virginia Beach. The area was politically dominated by the Powhatan Confederacy, based in the Virginia Peninsula, although the Chesepians defied the Confederacy's leadership. The Powhatan Confederacy defeated the Chesepians in the early 1600s. There is no further mention of the tribe in historical documents after 1627.

English settlers, members of the Virginia Company of London, first landed in the Americas at the point where the Chesapeake Bay and the Atlantic Ocean meet in the early 1607. They named the area Cape Henry, in honor of Henry Frederick, Prince of Wales. The Englishmen soon left the area and created the nation's first European settlement at Jamestown.

One of the area's first permanent settlers was Adam Thoroughgood. Thoroughgood first traveled to Virginia as an indentured servant and later became a prominent community leader.

Virginia Beach began as a small resort in the late 1800s. Its development was facilitated by the introduction of rail infrastructure and electricity in the area. The Princess Anne Hotel opened on the oceanfront in 1890. The Oceanfront Boardwalk was constructed in 1888 and was the site of performances by popular artists throughout the 1900s. The Virginia Beach Boulevard, constructed in 1922, provided automobile access to the shorefront from the City of Norfolk. The area attracted tourists for its coastal views, casinos, and family-friendly beaches.

Virginia Beach became an independent city in 1952 and was consolidated with Princess Anne County in 1963 (City of Virginia Beach, 2011; Princess Anne County/Virginia Beach Historical Society, 2001; VABeach.com, 2012; Virginia Beach Economic Development, 2011b).

In addition to tourism, Virginia Beach developed around the agribusiness industry. Over 172 farms now exist in Virginia Beach. Farmers trade their products in the City's markets.

There is also a strong military presence in Virginia Beach. The U.S. Navy sited a major fighter jet base, the Naval Air Station Oceana, in the City. However, residential development constrains the base and the Federal Government has proposed its closure. The U.S. Navy's Training Support Center Hampton Road and U.S. Army's Fort Story are also located in the City.

Today, real estate, tourism, agribusiness, and defense provide the economic base for Virginia Beach (Virginia Beach Economic Development, 2011a).

Virginia Beach hosts several annual events. They include: the East Coast Surfing Championships, North American Sand Soccer Championship, Pungo Strawberry Festival, American Music Festival with live music on the oceanfront, North American Sand Sculpting Championship, and Neptune Festival, which draws over 500,000 tourists to the shore (City of Virginia Beach, 2011; Virginia Beach Convention and Visitors Bureau, 2012).

5. Coastal Amenities

Virginia Beach City has 38 miles of coastline with about six public beaches. The Guinness Book of Records cites Virginia Beach as having the longest pleasure beach in the world (Coastal Travel Guide, 2012; Virginia Beach Economic Development, 2011a). There are also nine marinas and 13 yacht clubs in the City (U.S. Census Bureau, 2009). The City houses 255 local parks, which cover 4,500 acres, as well as several state parks and one national wildlife refuge, the Back Bay National Wildlife Refuge (10,000 acres) (Virginia Beach Economic Development, 2011a).

The Virginia Beach coast also includes several man-made landmarks. Some landmarks are reminders of the City's history, such as the lighthouses at Cape Henry and Adam Thoroughgood House, one of the oldest surviving colonial homes in the state. Other landmarks represent the City's modern development, including the Virginia Beach Amphitheater, where artists like Aerosmith and Kenny Chesney perform, and the Chesapeake Bay Bridge-Tunnel, the longest bridge-tunnel complex in the world (City of Virginia Beach, 2011; Virginia Beach Economic Development, 2011a; Virginia Beach Economic Development, 2011b).

6. General Economic Situation

The U.S. Census Bureau lists 10,906 business establishments in Virginia Beach City in 2009 (U.S. Census Bureau, 2009). The largest employers in the City are: the Sentara Medical Group, with 4,600 employees, and Science Applications International Corporation, with 2,500 employees (Virginia Beach Economic Development, 2011a).

7. Coastal Tourism/Recreation Activity

Tourism in Virginia Beach has many dimensions. The shorefront is a main attraction. The Guinness Book of World Records lists Virginia as having the longest pleasure beach in the world (Coastal Travel Guide, 2012). Tourists can enjoy the world's longest pleasure beach by walking the three-mile boardwalk, swimming, and lounging. The coastal waters offer the opportunity to surf, fish, paraglide, and sail. The Virginia Aquarium & Marine Science Center is another coastal attraction (Virginia Beach Economic Development, 2011a).

Visitors interested in American history can explore the area's historic sites, including colonial homes, churches, and plantations. For those interested in military history, the Military Aviation Museum houses one of the nation's largest historic military aircraft collections (Virginia Beach Economic Development, 2011a).

Virginia Beach's wildlife preserves allow visitors to immerse themselves in nature. Nature-oriented activities including hiking and birdwatching. Meanwhile, the City's downtown provides numerous options for urban entertainment, with modern sports facilities, concert halls, convention centers, art galleries, shopping venues, and restaurants (Virginia Beach Economic Development, 2011a).

According to the National Oceanic and Atmospheric Administration, an estimated 96.70 percent of the ocean-related jobs in Virginia Beach City are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$1.13 billion in Virginia Beach City, generating \$211.30 million in payroll income and supporting 11,560 jobs (Virginia Tourism Corporation, 2011). There are 1,266 establishments dedicated to leisure and hospitality in Virginia Beach City; the average weekly wage for employees of these establishments is \$296. Leisure and hospitality employment in Virginia Beach City increased by 7,285 jobs, or 32.23 percent, from winter to summer in 2010, reflecting the somewhat seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics,

2010). According to the 2009 U.S. Census City Business Patterns Survey, 56.98 percent of ocean recreation and tourism-related businesses in Virginia Beach City are small (U.S. Census Bureau, 2009).²

In 2009, 1,119 ocean-related establishments directly employed 19,382 people in Virginia Beach City. These numbers reflect an increase from 2000, when 661 establishments employed 13,761 people. From 2000 to 2009, the number of ocean-related establishments grew by 69.3 percent and the number of people employed by these establishments grew by 40.9 percent (National Ocean Economics Program, 2012).

There are 114 hotels, three bed and breakfasts, and five campgrounds in the City (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). Visitor accommodations gross approximately \$275 million in lodging sales per year (Virginia Beach Economic Development, 2011a). Approximately 2.0 percent of the housing units in Virginia Beach City are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the City as the restaurant industry, followed by the hotel industry and amusement, gambling, and other recreation industry. For most tourism-related industries, summer employment is double that of winter, indicating the importance of seasonal visitors. The industries associated with water sightseeing, boat dealers, pleasure boat rentals, and travel agencies also provide employment.

Exhibit 5. Virginia Beach City Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	16	36	25	-35.9%
Marinas (713930)	0	0	0	0%
Boat Building and Repair (336612)	0	0	0	0%
Boat Dealers (441222)	68	102	88	-47.6%
Renting Pleasure Boats (532292)	0	126	57	-57.1%
Land-Based				
Hotel Employment (72111)	24	4,916	3848	9.8%
Restaurant Employment (7221 & 7222)	15,919	18,807	17,369	0.7%
Amusement, Gambling, Other Recreation (713)	1,877	3,710	2,478	-0.6%
General Tourism				
Travel Agencies (561510)	266	0	240	-35.7%
Tour Operators (561520)	0	0	0	0%
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	- [^]

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

[^]No percent change calculated because either 2010 or 2005 data unavailable.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

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Westmoreland County, Virginia

1. Synopsis

Westmoreland County is located on the peninsula between the Potomac and Rappahannock Rivers on the border of Virginia and Maryland. It comprises part of the area known as Virginia's Northern Neck. The County is known for being the birthplace of George Washington, James Monroe, and Robert E. Lee; it is also known for the gambling activity in the Town of Colonial Beach. About 17,500 people reside in Westmoreland County, and the County is less than half as densely populated as the rest of the state (U.S. Census Bureau, 2010). The County's economy depends on dairy agriculture and tourism.

Tourism represents a significant portion of the ocean economy in Westmoreland County. In 2009, 48 ocean-related establishments directly employed 527 people (National Ocean Economics Program, 2012). According to the National Oceanic and Atmospheric Administration, an estimated 61.50 percent of the ocean-related jobs in Westmoreland County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). Approximately 86.67 percent of ocean recreation and tourism-related businesses in Westmoreland County are small (U.S. Census Bureau, 2009).¹

2. Location

Westmoreland County, shown in Exhibit 1, is located on the peninsula between the Potomac and Rappahannock Rivers on the border of Virginia and Maryland. It comprises part of the area known as Virginia's Northern Neck. It lies 65 miles from Richmond and 100 miles from Washington, DC (Virginia Economic Development Partnership, 2012). Adjacent counties include Charles County (to the north) and St. Mary's County (to the northeast) in Maryland and Northumberland County (to the southeast), Richmond County (to the south), Essex County (to the southwest), and King George County (to the northwest) in Virginia (Google, Inc., 2012). The County has 236 square miles of land and 250 miles of shoreline along the Potomac and Rappahannock Rivers (Virginia Economic Development Partnership, 2012; Westmoreland County Government, 2008).

Exhibit 1. Map of Westmoreland County



Source: ESRI, 2011 and OpenStreetMap, 2011.

¹ Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Westmoreland County is primarily accessible by car on Virginia Routes 3, 202, and 205. Route 3 runs the length of the County (Google, Inc., 2012). Bus infrastructure also exists. Bay Transit operates public transit routes between Westmoreland and neighboring counties (Virginia Department of Rail and Public Transportation, 2011).

3. Demographics

Westmoreland County has a year-round population of 17,454 (U.S. Census Bureau, 2010). The following three tables profile Westmoreland County's population. As Exhibit 2 shows, at 4.4 percent growth, the population in Westmoreland County has increased more slowly over the past decade than the state as a whole. The State population grew at a rate of 13 percent.

Exhibit 2. Population Profile

	Westmoreland	Virginia
Year-Round Population	17,454	7,078,515
Population Change (2000-2010)	4.4%	13.0%
Median Age (Years)	46.6	37.4
Percent Female	51.2%	50.9%
Percent Foreign Born	4.0%	10.8%
<i>Ethnic Profile</i>		
White	65.9%	68.6%
Black/African American	28.0%	19.4%
Asian	0.6%	5.5%
Hispanic/Latino	5.7%	7.9%
American Indian	0.4%	0.4%

Source: U.S. Census Bureau, 2010.

Exhibit 3. Economic and Education Profile

	Westmoreland	Virginia
Unemployment Rate	8.2%	7.9%
Percent Out of Labor Force	38.4%	33.3%
Median Household Income	\$52,990	\$61,090
Percent of Pop. Below Poverty Line	9.7%	10.7%
<i>Educational Attainment</i>		
High School Diploma	35.3%	25.3%
Bachelor's Degree	8.5%	19.9%
Graduate/Professional Degree	7.5%	14.0%

Source: U.S. Census Bureau, 2010.

Exhibit 4. Housing Profile

	Westmoreland	Virginia
Population Density (people/sq. mile)	76.1	202.6
Housing Density (structures/sq. mile)	46.3	85.2
Housing Structures that are Independent Units	86.6%	62.6%
Occupied Units	68.8%	89.7%
Properties for Seasonal, Rec. or Occasional Use	20.2%	2.4%
Median House Value	\$202,300	\$256,600

Source: U.S. Census Bureau, 2010.

4. Historical Context of the Economic Traditions

Westmoreland County was established in 1653. At that time, its boundaries encompassed many present-day counties in Northern Virginia. A plantation economy developed in the area, enabled by the labor of indentured servants from England. When they were released from duty, the indentured servants settled in Westmoreland or moved to the frontier. Thus, in the 1600s and 1700s, Westmoreland was home to many poor immigrants.

Westmoreland played an important role in the American Revolution. In 1766, Richard Henry Lee wrote the Leedstown Resolves, the predecessor of the Declaration of Independence. The Resolves were signed in Westmoreland. George Washington was also born in Westmoreland.

Beginning in 1791, Westmoreland was home to freed slaves. The emancipation of almost 500 slaves by Robert Carter II in 1791 was the largest number ever freed by an individual in the United States and the largest emancipation in North American history before the Civil War.

During the Civil War, Westmoreland found itself at the border between the Union and Confederacy. Confederate Robert E. Lee was born in Westmoreland and turned down the offer to lead the Union troops, stating that he would not invade his homeland.

The nation's first regularly scheduled steamboat stops were located in Westmoreland. The Colonial Beach Improvement Company built a steamboat wharf at Colonial Beach in 1893. With the second largest beachfront in the state, Colonial Beach became a popular summer resort, popular for swimming and fishing. Visitors traveled from Washington, DC by boat. With the introduction of the automobile, more distant beaches became accessible, including those on the Eastern Shore, and Colonial Beach lost some of its tourist base. However, when gambling became legal in Maryland, Colonial Beach designed a new tourist attraction: pier casinos that extended into Maryland waters. The piers have since been destroyed by hurricanes. As nearby urban centers like Washington, DC expand, Westmoreland serves as a destination for vacations and second homes.

In addition to tourism, the County's economy depends on dairy agriculture (Town of Colonial Beach, 2012; Westmoreland County Government, 2008).

5. Coastal Amenities

Westmoreland County has about 250 miles of shoreline along the Potomac and Rappahannock Rivers. There are two public beaches, eight marinas, and one yacht club in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009; Westmoreland County Government, 2008). Westmoreland County includes two federally protected areas: the George Washington Birthplace National Monument (538

acres) and the Mothershead Unit of the Rappahannock River Valley National Wildlife Refuge (8,191 acres across all units) (U.S. Fish and Wildlife Service, 2012; Westmoreland County Government, 2008).

6. General Economic Situation

The U.S. Census Bureau lists 347 business establishments in Westmoreland County in 2009 (U.S. Census Bureau, 2009). As of 2011, the largest employers in the County were: the Westmoreland County School Board, Potomac Supply Corporation, and Carry on Trailer Corporation (Virginia Employment Commission, 2012).

7. Coastal Tourism/Recreation Activity

Tourism in Westmoreland County focuses on its history and rural landscapes. Tourists can visit the birthplaces of George Washington, James Monroe, and Robert E. Lee, as well as the gathering place of 115 Patriots who laid the foundation for the American Revolution by signing the Leedstown Resolves. Five Civil War battlefields are located in Westmoreland. The County website also describes the “pristine beauty” of the local farms, vineyards, and shoreline. Outdoor recreation activities include berry picking, wine tasting, boating, fishing, hiking, and cycling (Virginia Economic Development Partnership, 2012; Westmoreland County Government, 2008; Westmoreland County Tourism Council, 2010).

According to the National Oceanic and Atmospheric Administration, an estimated 61.50 percent of the ocean-related jobs in Westmoreland County are connected to tourism (National Oceanic and Atmospheric Administration, 2012). During 2010, domestic travelers spent \$51.12 million in Westmoreland County, generating \$11.93 million in payroll income and supporting 690 jobs (Virginia Tourism Corporation, 2011). There are 41 establishments dedicated to leisure and hospitality in Westmoreland County; the average weekly wage for employees of these establishments is \$299. Leisure and hospitality employment in Westmoreland County increased by 161 jobs, or 43.40 percent, from winter to summer in 2010, reflecting the somewhat seasonal nature of the tourism industry (U.S. Bureau of Labor Statistics, 2010). According to the 2009 U.S. Census County Business Patterns Survey, approximately 86.67 percent of ocean recreation and tourism-related businesses in Westmoreland County are small (U.S. Census Bureau, 2009).²

In 2009, 48 ocean-related establishments directly employed 527 people in Westmoreland County. These numbers indicate that the ocean economy in Westmoreland has not changed significantly from 2000, when 48 establishments employed 505 people. From 2000 to 2009, the number of ocean-related establishments did not change and the number of people employed by these establishments grew by 4.4 percent (National Ocean Economics Program, 2012).

There are six hotels, one bed and breakfast, and two campgrounds in the County (Coastal Travel Guide, 2012; U.S. Census Bureau, 2009). Westmoreland has chosen not to institute a lodging tax (Westmoreland County Government, 2008). Approximately 20.2 percent of the housing units in Westmoreland County are for seasonal, recreational, or occasional use (U.S. Census Bureau, 2010).

As shown in Exhibit 5, the U.S. Bureau of Labor Statistics lists the largest land tourism-related employer in the County as the restaurant industry, followed by the marinas industry. The data reflect the seasonal nature of these industries.

² Businesses are considered small when they have 9 or fewer employees. This figure does not include sole proprietors.

Exhibit 5. Westmoreland County Employment by Industry, 2010

Industry (NAICS Code)	Employment			
	January	July	Average	Change ('05-'10)
Marine				
Scenic and Sightseeing Transportation, Water (487210)	-	-	-	^
Marinas (713930)	37	65	45	0%
Boat Building and Repair (336612)	-	-	-	^
Boat Dealers (441222)	-	-	-	^
Renting Pleasure Boats (532292)	-	-	-	^
Land-Based				
Hotel Employment (72111)	0	18	0	-100.0%
Restaurant Employment (7221 & 7222)	232	328	281	-3.1%
Amusement, Gambling, Other Recreation (713)	0	0	0	0%
General Tourism				
Travel Agencies (561510)	-	-	-	^
Tour Operators (561520)	-	-	-	^
Tour Bus, Scenic, and Sightseeing, Operation (487110)	-	-	-	^

Source: U.S. Bureau of Labor Statistics, 2010, 2005.

*Percent change calculated as follows: (2010 figure minus 2005 figure) divided by (2005 figure).

^No percent change calculated because either 2010 or 2005 data unavailable.

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