

Executive Summary

When charting the course for the Middle Georgia Economic Development District for the next five, ten, and twenty years, regional leaders focused on one adjective: **THRIVING**. In times where it seems overly difficult for a community to simply survive, the goal must be to aim higher. Middle Georgia seeks to be a diverse region of opportunity, where people *want* to live, learn, work, and play. This guiding vision drives the Middle Georgia Comprehensive Economic Development Strategy (CEDS) toward the end goal of increasing economic prosperity for all within the region.

Certainly, there are challenges in the Middle Georgia region. Economically, the region lags behind most other regions in terms of the well-being of its residents; many individuals find themselves out of work and without the necessary skills to obtain employment. Middle Georgia also tends to fall behind others in innovation. The leading edge of industry is too often found elsewhere, with Middle Georgia struggling to catch up. However, many of the resources necessary to undertake a regional transformation are already in place. A number of industries are poised to see significant growth in Middle Georgia, and a renewed focus on fostering entrepreneurship in the region has the potential to drive new growth and development.

The greatest need over the next five years is to support projects which increase the region's capacity for continued growth and adequately position Middle Georgia to capitalize on growing trends in the national market. For Middle Georgia, these regional priorities include:

Sustaining Robins Air Force Base and the Defense Industry
Connecting a Skilled Workforce with Quality Jobs
Developing the Freight and Logistics Industry
Investing in Infrastructure
Enhancing the Regional Aerospace Industry
Capitalizing on our Natural and Cultural Resources
Investing in Communities

While this represents a broad and ambitious scope of work, if incremental progress is achieved within each of these areas, the region can expect to see significant economic benefit in the future. These benefits would include a more resilient and diverse economy, a populace that enjoys a much higher quality of life, greater inflow of outside spending and investment in the community, and a higher caliber workforce for regional employers. These projects each require significant collaboration and communication among community partners, but if accomplished, would bring us one step closer to a **THRIVING MIDDLE GEORGIA**.

About the 2017 – 2022 CEDS

The Comprehensive Economic Development Strategy (CEDS) for the Middle Georgia Economic Development District is updated every five years as required under regulations from the U.S. Economic Development Administration (EDA). This plan, which is built upon numerous local plans and economic development initiatives, provides a broad regional framework to shape public sector support for growing economic prosperity at a regional level. This CEDS is prepared to meet the requirements of EDA for funding through the Public Works and Economic Adjustment Assistance programs. It is also a requirement for continued designation of the Middle Georgia Economic Development District, which consists of 11 counties and 20 cities in the central part of Georgia. The boundaries of the Economic Development District are coterminous with the boundaries of the Middle Georgia Regional Commission, which provides economic and community development staff for the region, while also serving as the Area Agency on Aging and state Service Delivery Region for the same 11 counties.

CEDS Strategy Committee

The governing Council of the Middle Georgia Regional Commission was designated as the Strategy Committee for updates to the CEDS. This body includes both local elected officials and private sector representatives from each county, as well as several statewide appointees. The members of the Regional Commission Council, as of adoption of this plan, are listed below:

Baldwin County	Crawford County	Houston County	Jones County	Macon-Bibb County	Monroe County
<i>Johnny Westmoreland</i>	<i>Paul Chapman</i>	<i>Tommy Stalnaker</i>	<i>Chris Weidner</i>	<i>Robert A.B. Reichert</i>	<i>Greg Tapley</i>
<i>Richard Mullins</i>	<i>Becky Smith</i>	<i>John Harley</i>	<i>Stephen Tingen</i>	<i>Bert Bivens</i>	<i>Eric Wilson</i>
<i>Bill Millians</i>	<i>Charlie Westberry</i>	<i>George Slappey</i>	<i>Jimmy Roberts</i>	<i>Isaac Culver</i>	<i>Richard Bazemore</i>
<i>Derek Williams</i>	<i>Brent Lowe</i>	<i>Randy Toms</i>	<i>Francis Adams</i>	<i>Lonnie Miley</i>	<i>Melvin Lawrence</i>
<i>Denese Shinholster</i>	<i>Robert Ray</i>	<i>Clifford Holmes</i>	<i>Frank Duke</i>	<i>Robby Fountain</i>	<i>Edd Norris</i>
Peach County	Pulaski County	Putnam County	Twiggs County	Wilkinson County	Statewide Appointees
<i>Martin Moseley</i>	<i>M.A. "Butch" Hall, Chair</i>	<i>Alan Foster</i>	<i>Ken Fowler</i>	<i>Mark Dupree</i>	<i>James Vaughn</i>
<i>Barbara Williams</i>	<i>Henry Cravey</i>	<i>Walter Rucker</i>	<i>Charles Williams</i>	<i>Charles Brack</i>	<i>Nancy Nash</i>
<i>James Khoury</i>	<i>Lee Slade</i>	<i>Bill Sharp</i>	<i>Shannon Hart</i>	<i>Marty Dominy</i>	<i>Charles Sims</i>
<i>James Richardson</i>	<i>Tim Young</i>	<i>Billy Webster</i>	<i>Kathryn Epps</i>	<i>C.L. Brooks</i>	
<i>Carolyn Biggs</i>	<i>James Colson</i>	<i>Gary Sanders</i>	<i>Jimmy Smith</i>	<i>Emma Bacon</i>	

Public and Stakeholder Involvement

The Middle Georgia Regional Commission actively sought input from economic development practitioners throughout the planning process. Several regional stakeholder meetings were held which were open to representatives of the CEDS Strategy Committee, as well as staff-level experts from the various local governments of the region. Through stakeholder meetings and direct interviews, the following agencies also participated in the planning process:

<i>City of Centerville Economic Development</i>	<i>Georgia Department of Economic Development</i>
<i>City of Forsyth Economic Development</i>	<i>Georgia Department of Community Affairs</i>
<i>City of Hawkinsville Economic Development</i>	<i>Georgia Department of Labor</i>
<i>City of Perry Economic Development</i>	<i>Houston County Development Authority</i>
<i>Central Georgia Technical College</i>	<i>Macon-Bibb County Industrial Authority</i>
<i>Crawford County Development Authority</i>	<i>Macon-Bibb Planning and Zoning</i>
<i>Development Authority of Monroe County</i>	<i>Macon Economic Development Commission</i>
<i>Development Authority of the City of Jeffersonville and Twiggs County</i>	<i>Peach County Development Authority</i>
<i>Development Authority of Jones County</i>	<i>Perry Area Convention and Visitors Bureau</i>
<i>Development Authority of the City of Milledgeville and Baldwin County</i>	<i>Putnam Development Authority</i>
<i>Development Authority of Wilkinson County</i>	<i>Warner Robins Development Authority</i>
<i>Eatonton-Putnam Chamber of Commerce</i>	<i>Warner Robins Convention and Visitors Bureau</i>
<i>Fort Valley Downtown Development Authority</i>	<i>Wilkinson County Board of Commissioners</i>

Middle Georgia Regional Commission staff also sought out opinions of stakeholders throughout the process of updating numerous local comprehensive plans in the lead up to the required CEDS update. The comprehensive plan steering committees of each respective local government in the region also provided useful insight into the economic development challenges of their local communities and were instrumental in completing this plan. A number of goals, objectives, and implementation activities were also derived from the 2016 Regional Plan, which also contained an active group of stakeholders.

A draft of this plan will be distributed for public comment and review on August 11, 2017, prior to final plan adoption by the CEDS Strategy Committee in September 2017. Any comments received will be noted in the final plan.

Strategic Direction

In early May 2016, hundreds of leaders from the Middle Georgia area gathered to celebrate the grand opening of the Kumho Tire Georgia plant. It was the largest manufacturing plant to open its doors in Macon in over 40 years. In his prepared remarks, Georgia Governor Nathan Deal acknowledged, “A lot of us have been waiting for this day for a long time, and we are glad it is finally here.” This simple quote speaks to the truth that attaining economic prosperity for any state or region is quite the long-term proposition.



Figure 1 - The grand opening ceremony for the Kumho Tire in Macon on May 2, 2016. Kumho Tire was the largest employer to open in Middle Georgia since the 2012-2017 CEDS was adopted.

The regional vision statement speaks in this broadest sense about what kind of place Middle Georgia wants to be, even if that day is a long time coming. The goals and objectives of this section provides more concrete medium- and long-range pursuits to aid in attainment of the regional vision. The action plan provides the most specific short-term steps that can lead toward incremental gains in the region’s economic prosperity.

Regional Vision

A thriving Middle Georgia, united by regional pride and mutual respect, where cooperation and collaboration expand the region’s economic prosperity, provide an exceptional education for all of its residents, and ensure that every Middle Georgian has a high quality of life through the provision of effective local government services and the preservation of natural and cultural assets. In short, a diverse region of opportunity where people want to live, learn, work, and play.

Goals and Objectives

The stakeholder engagement process in the CEDS and related plans over the past 18 months have provided a number of goals, listed below, as related to economic development. These goals all come naturally out of the broader vision for economic prosperity. Following out of each goal are a handful of more specific objectives that are related to obtainment of the goals.

- ❖ **Improve utility infrastructure quality and capacity.**
 - Ensure adequate capacity of water, sewer, electric, and natural gas services.
 - Invest in maintenance and upkeep of county and municipal utility systems.
 - Extend service to present and future industrial sites.
 - Ensure adequate waste disposal and recycling capacity, with expansion if needed.

- ❖ **Enhance telecommunications access throughout the region.**
 - Expand service areas of high-speed internet providers, especially in rural areas and for significant community facilities and major employers.
 - Increase competition and consumer choice in telecommunications market.
 - Improve reliability of cellular phone service in rural communities.

- ❖ **Improve transportation connectivity within and through the Middle Georgia region.**
 - Improve east-west transportation and shipping routes.
 - Provide additional access to efficient public transportation.
 - Secure an inland port within the Middle Georgia region.
 - Enhance aerospace assets, including Middle Georgia Regional Airport.
 - Enhance rail accessibility for industrial parks and stimulate growth of Middle Georgia in national rail and freight transportation networks.

- ❖ **Diversify economy at regional and sub-regional levels.**
 - Reduce broad regional overreliance on defense sector, including support of growth in commercial aerospace and high-tech sectors.
 - Increase job opportunities in rural communities transitioning away from agriculture, forestry, and mining.
 - Invest in regional high-growth sectors, including healthcare, logistics, and tourism.
 - Assist workers displaced due to decline in coal industry jobs.

- ❖ **Reduce skills gap between job seekers and job openings.**
 - Implement additional apprenticeships, internships, and co-ops with employers.
 - Expand role of College and Career Academies in workforce development.
 - Enhance soft skills training for prospective workers.
 - Retain talented young professionals in the Middle Georgia region.
 - Leverage resources of Robins Air Force Base, including large retiree pool.
 - Attract and create higher-paying jobs for the region.

- ❖ **Increase private sector jobs and investment in Middle Georgia.**
 - Effectively recruit new industry into the region.
 - Provide technical assistance to existing businesses and industries.
 - Actively strengthen supply networks and the existing regional economic base.

- ❖ **Revitalize downtowns, commercial corridors, and blighted neighborhoods.**
 - Clean up and redevelop former industrial and brownfield sites.
 - Undertake active code enforcement of blighted properties, particularly on major transportation thoroughfares.
 - Utilize film and tourism industries to promote effective reuse and cleanup of older and blighted properties.

- ❖ **Enhance regional collaboration among all partners to address goals and objectives.**
 - Effectively use a variety of forums and initiatives to support collaboration.

The State of Middle Georgia: Data and SWOT Analysis

A requirement of the CEDS (and a good practice for most planning documents) is a brief summary or analysis of key data and statistics. The following sections examine both hard data and stakeholder insights regarding the Middle Georgia economy. Through this section, the CEDS will seek to accurately describe the current state of Middle Georgia and how it got to this point.

Summary Background: Geographic and Historical Context

Middle Georgia's history has been greatly defined by its strategic location in relation to the State of Georgia and the Eastern Seaboard. Middle Georgia stretches across the Fall Line, which roughly bisects the district running from east to west. As is typical throughout the nation, the intersection of the Fall Line with major bodies of water served as a natural crossroads where people came together and communities were created. In the case of Middle Georgia, this truly dates back over 17,000 years of continuous settlement, going back to the earliest settlements of Native Americans.

More recently, the City of Milledgeville became the first major settlement along the banks of the Oconee River and was designated as the state capital in 1804. Other towns and cities, including Macon, emerged throughout the antebellum period with agriculture (particularly cotton) and the movement of agricultural products as primary drivers of the economy. Again, it was the region's geography—providing it with rich soils and effective transportation access that allowed it to grow throughout much of the late 1800s and early 1900s. In the more rural portions of the region, cotton remained the most significant crop until the boll weevil infestation forced many farmers to abandon growing cotton.



Figure 2 – Georgia's Old State Capitol in Milledgeville



Figure 3 – Downtown Macon in the early 1900s.

In the years that followed, a variety of other industries took hold throughout the region. Dairy farming and timbering grew into major industries, particularly in the rolling forested hills of Putnam and Monroe counties. Kaolin mining became the dominant industry along the eastern stretches of the Fall Line, particularly in Twiggs and Wilkinson counties—among the few places in the United States where Kaolin can still be found. Farming continued throughout the southern parts of the region, where Fort Valley became the peach capital of the world, and manufacturing began to take hold throughout Macon.

The region's largest current employer arrived in the small town of Wellston in 1941 following regional lobbying to bring an army air depot to Middle Georgia. When World War II began shortly thereafter, the Warner Robins Army Air Depot rapidly grew, with the neighboring town itself changing its name to honor General Augustine Warner Robins, the father of logistics in the modern U.S. Air Force. The City of Warner Robins and many neighboring communities throughout the area grew rapidly in the post-war era to support the base and to take advantage of employment opportunities.

In more recent years, these same sectors of the economy have remained major contributors to employment and well-being throughout Middle Georgia; however, significant challenges have emerged as the region's economy changes for the 21st Century. Jobs have declined in the traditionally large sectors due to factors such as globalization, automation, and shifting of resources and opportunities to other parts of the country. Agriculture and kaolin mining have both been on steady declines for quite some time. The manufacturing sector has generally followed a downward trend, marked by major plant closures like Brown and Williamson in 2004 and Rheem Manufacturing in 2009. Likewise, Central State Hospital began closing in 2010, and Plant Brant, a major coal-fired power plant on Lake Sinclair closed in 2015. There are most certainly significant opportunities for new business in Middle Georgia as a result of these many changes. However, our competition for these gains is now global in nature.

The region does face challenges, with many areas experiencing high rates of poverty and unemployment. Economic recovery in Middle Georgia from the Great Recession has lagged conspicuously behind the pace of recovery at both the state and national levels. Meanwhile, some areas that are doing relatively well lack economic diversity—placing them at high risk for future economic downturns. With this in mind, the time is right for investment to take advantage of changing global market trends to grow Middle Georgia's economic prosperity.



*Figure 4 – Plant Branch, prior to demolition of the smokestack.
Photo Credit: Milledgeville Union Recorder (2014).*

Summary Background: Statistical Overview

Much of the changing historical context of the regional economy has led to new challenges and necessary adaptations; a variety of these challenges remain today. An analysis of demographic data in Middle Georgia reveals a region that often struggles with persistently high rates of poverty and unemployment, particularly when compared to the state and nation at-large. Many parts of the region's public education system are also lagging behind other regions, resulting in Middle Georgia's failure to be on the cutting edge of the latest innovative technologies and practices. While there are certainly opportunities to be seized, there is a clear and present need for concentrated economic and community development, given many of the statistical indicators seen in Middle Georgia presently.

Demographic Trends

As of 2015, the 11 counties of Middle Georgia, had a population of just under 500,000 individuals. This represents an ongoing trend of modest growth that is expected to continue through the first half of the 21st Century, adding a little over 100,000 people by 2050. Table 1 provides additional projections of county and regional population. The majority of this growth is projected to occur in the primarily urban and suburban counties of Houston, Jones, and Monroe. The more rural counties are generally expected to remain fairly steady in population, with some experiencing a slight decline. The population is also expected to age, as illustrated by Table 2. As the aging of the regional populace continues, more and more employees will begin to near the age of retirement, which may drain the supply of qualified and skilled workers. Interestingly, a number of Middle Georgia counties are projected to age at a slower rate than the nation and state at-large; however, a number of these counties already have a significantly older population than the state or nation. This means that the aging workforce is still a challenge Middle Georgia will need to confront.

Socioeconomically, the region is exceptionally diverse. The Georgia Department of Community Affairs ranks each county in the state on an annual basis by their relative levels of economic well-being and distress. This range in Middle Georgia goes from the 15th most distressed county to the 16th most prosperous county out of 159 counties in the state. Table 3 lists the relative standing of each county as ranked for the state's determination of job tax credit eligibility. Over the past 45 years, wages throughout Middle Georgia have steadily grown; however, Middle Georgia has stayed somewhat behind the rest of the state and nation throughout this entire period, with the gap accelerating since approximately 1990. Table 4 indicates this rate of growth. Today, average wages throughout the region are approximately \$11,000 less than the national average.

Not unrelated from the lower wage rates in the region, median household incomes are also considerably lower throughout Middle Georgia compared to the State of Georgia or the nation as a whole. Three counties have income and poverty rates comparable to the national average: Houston, Jones, and Monroe. These are the same counties that are expected to see the greatest

population growth in the years ahead. As Table 5 shows, approximately one in five Middle Georgians are living below the federal poverty level, which illustrates the need to grow economic prosperity throughout the region. Statistically, the region has seen modest improvement in the past few years, with over half the counties in Middle Georgia now having a poverty rate below that of the state average. However, poverty remains highly concentrated in certain parts of the region, making alleviation of poverty an essential focus of economic development.

Education and Labor Force

Within the 11 counties of the Middle Georgia region, Macon-Bibb County serves as the largest employment hub for the region, as over 46,000 individuals regularly commute into Macon-Bibb County to reach their primary jobs. Houston County, the region's other urban county also has a significant number of jobs, including the region's largest employer, Robins Air Force Base. Table 6 shows the commuting patterns of each county in the region, including the daily inflow and outflow of workers. The American Community Survey contains a five-year average of labor force participation and unemployment, which can be found in Table 7. Middle Georgia maintains an unemployment rate higher than the remainder of the state or nation, although this gap has been gradually decreasing in recent years. Middle Georgia recovered more slowly than many other parts of the nation following the Great Recession and continues to be somewhat behind, albeit with slightly more parity as of late. As of the most recent snapshot in June 2017, Middle Georgia had an unemployment rate of 5.5 percent, compared to 4.8 percent for the state and 4.4 percent for the nation. It is also worth noting that the region's labor force participation rate also remains below that of the state and nation, with the rate declining at every level in recent years.

Participation in the labor force and unemployment rate also have a strong correlation with educational attainment, suggesting that those with a higher level of education are more likely to participate in the labor force and be actively employed. Many studies have also shown that these individuals will likely earn higher incomes throughout the course of their careers. With this in mind, Tables 8 and 9 show information about the educational attainment of the Middle Georgia populace. As the data indicate, the region is behind the remainder of the state and nation in terms of educational attainment. For example, only 28.5 percent of Middle Georgia residents over the age of 25 have either a 2-year or 4-year degree; however, 37.8 percent of Americans at-large hold the same. Likewise, 15.2 percent of regional residents over the age of 25 lack a high school diploma, or equivalent, compared to only 13.2 percent of all Americans. These data may speak to challenges within the local education system, but may also be the product of brain drain, with highly-educated individuals deciding to leave the region for what they consider to be greener pastures.

Table 10 illustrates that graduation rates of students across the region have shown improvement and now rival the statewide average. As of 2016, only seven of the region's 20 traditional high schools fall below the state graduate rate, including 8 of the 11 school systems that are outperforming the state in high school graduation rates. Unfortunately, Table 11 indicates that

some of these students may not be leaving high school adequately prepared. Statewide, 28 percent of Georgia high school graduates in the technical college system or university system require remediation. However, in Middle Georgia, several high schools have more than half of their students typically needing remediation at the next level, including a remediation rate of nearly 80 percent of college-bound graduates from Northeast High School in Macon-Bibb County. As such, the improving graduation rates should be interpreted with a bit of caution. If students are simply being passed through the school system without learning necessary skills, they will remain poorly suited for the workforce.

Looking in the long term, literacy remains a concern for the region. Only three school systems (Houston, Jones, and Monroe) outperform the state on measures of third-grade reading level, as seen in Table 12. Not surprisingly, these counties tend to score the highest on economic well-being and are projected to attract the greatest number of new residents in upcoming years. Rates of illiteracy also typically exceed the state and national averages among the adult population, as seen in Table 13. Overall, this lack of reading skills can have negative impacts on the workforce and will make it harder to break the cycle of persistent intergenerational poverty.

Housing

Housing serves as a chief indicator of a community's economic vitality and quality of life. As the Middle Georgia region's population grows and as its economy develops, its housing stock must be maintained, grown, and redeveloped to ensure residents of the region have the shelter necessary to prosper. The measures housing success must include is not only quantity of housing but also its quality, availability, affordability, and placement. The challenge of the community is to create the environment that will spur positive housing development in order to meet the community's needs. According to the 2015 American Community Survey, as shown in Table 14, the vast majority of homes in Middle Georgia are single-family stick-built units. This is similar to the national average, but the region has relatively fewer apartments and multi-family units. Instead, in many of Middle Georgia's less populous and more rural counties, manufactured homes form a high percentage of the available housing stock, including nearly 40 percent of all homes in Twiggs County.

Housing is generally affordable in Middle Georgia, as median home values typically fall below the state and national medians. Table 15 includes more data on this topic. However, the lower medians come at the expense of a "missing middle" according to many local economic developers and stakeholders. These types of homes are attractive units that typically characterize a moderately-dense walkable neighborhood with affordable but non-subsidized units for students, young professionals, and the working class. The demand seemingly exists for these types of homes within Middle Georgia, but it currently appears that the supply has not yet found ways to meet demands.

Housing condition is generally good in Middle Georgia (Table 16), although a lack of home internet access remains a challenge (Table 17). This is especially relevant in rural communities.

Industry Cluster Analysis

Across the region, total employment has increased since 2001. Employment briefly peaked in 2008, followed by a decline in the ensuing recession. In 2015, employment finally surpassed its pre-recession peak; however, the region has experienced a number of employment changes in the past 15 years. This has occurred both within the various employment types, as well as within the major industries of the region. Data obtained from the Bureau of Economic Analysis tracks these changes and can be found in Table 18.

In terms of employment type, traditional wage and salary employment has held relatively steady in the past 15 years. Nearly all new growth in employment has come from an increase in the number of proprietors. This represents a tremendous opportunity for small businesses to play an increasingly significant role in the marketplace. To effectively harness these opportunities, local and regional infrastructure to support investments in entrepreneurship will be required. This includes educational opportunities that focus on business development, as well as small business incubators and makerspaces where individuals can experiment with new technologies and ideas.

Among private sector employment, the construction and manufacturing sectors have shed the greatest number of jobs since 2001. The manufacturing sector has seen employment decline by over 30 percent since 2001. While this trend was perpetuated in the recent recession, manufacturing job losses throughout the region preceded the recession by many years. Economic recovery has slowly reversed this trend to some extent, but a significant gap still remains between employment in 2001 and today. Construction jobs also make up a large number of lost jobs since 2001 but have also begun to rebound. The information sector, which includes media and publishing, has seen a decline, particularly in urban areas. In the rural areas, the farming, forestry, and mining sectors have been hard hit.

Fortunately, many of the jobs lost within the region have been offset in some other sector of the economy. The healthcare and social assistance sector has added the greatest number of jobs since 2001, with over 9,000 new employees, which is likely in response to national trends of an aging populace. With two major hospitals, Navicent Health and Coliseum Medical Center, as well as several smaller hospitals around the region, Middle Georgia can serve as a hub for those outside of the region's 11 counties. In addition, the transportation and logistics sector is a prime area for growth due to the region's strategic geographic position within the transportation system of the state. This sector has experienced the greatest percentage-based job creation, with over 200 percent growth in employment since 2001. Tables 19 and 20 provide a more in-depth cluster analysis of the Middle Georgia region, with additional data on job growth in recent years.

Table 21 shows the projected occupation growth that Middle Georgia will likely see in the next seven years. Given the aforementioned trends, the healthcare and service occupations are expected to see growth, as is the transportation and logistics industry.

Innovation

A final important measure for the Middle Georgia region is its capacity for innovation. Tables 22 and 23 provide an overview of the region's innovation index, both on a county-by-county basis, as well as on a regional basis. In each comparison, the region sees significant room for improvement, ranking at the bottom 15th percentile of all economic development districts in the nation. While this ranking is good for eighth among Georgia's economic development districts, this represents a very low bar, with several Georgia districts having among the lowest innovation capacities in the nation.

Regional innovation capacity is based on several factors, including human capital and knowledge creation, business dynamics, business profiles, employment and productivity, and economic well-being. Middle Georgia fairs moderately well in human capital measures, particularly related to patents, universities, and creation of STEM degrees. However, it tends to lag behind in other measures.

Most notable among the region's deficiencies is its low index score for business dynamics. Most significantly, this involves a lack of venture capital flowing through the region and a lack of "churn" among businesses that can lead to creative new establishments. In other words, businesses in Middle Georgia tend to be stagnant, with a lack of entrepreneurial activities that can lead to improvements among businesses practices.

Another significant weakness for the region's innovation index is the compensation component of economic well-being. Growth in earnings and income has been exceptionally slow in Middle Georgia compared to other regions among both proprietors, as well as in traditional wage and salary employment. Middle Georgia is the 11th slowest region in the nation for per capita personal income growth among all 384 economic development districts. This stagnation of wages, combined with high poverty and unemployment greatly depresses regional innovation.

Middle Georgia is also challenged by a lack of diversity in major economic clusters. Most notably, this involves overreliance on the defense industry, but also includes significant clusters to the region like nonmetal mining (typically kaolin), forestry, paper, and wood products. Even more challenging, these are sectors that have typically not been growing in recent years, resulting in lower levels of employment and productivity per worker. Notably, Middle Georgia is among the slowest growing regions in the nation in the measure of change in GDP per worker. This stagnation represents another challenge to improving the region's capacity for innovation.

Taken together, the innovation statistics show a clear need to be forward-thinking in creative ways to support regional entrepreneurship and grow economic prosperity. While many factors may be beyond the control of regional decision-makers. The advantages of Middle Georgia's higher education system can lead the way in making effective changes.

Reference Plans for Further Reading

While data tables for the above statistics can be found in the appendix of this plan, several other planning resources are available to provide additional in-depth statistical insight on the current trends, economic opportunities, and financial impacts within the region. Some were drafted by Middle Georgia Regional Commission staff, and others were produced by outside consultants.

- ❖ Middle Georgia Regionally Important Resources Plan (2010)
- ❖ Middle Georgia Freight and Logistics Study (2015)
- ❖ Plan for ... A Thriving Middle Georgia (2016)
- ❖ Region 6 Workforce Development Plan (2016)
- ❖ Middle Georgia... Growing Strong report (2016)
- ❖ Diamond in the Rough (2017)
- ❖ Robins Air Force Base Economic Impact Statement (annual)
- ❖ Various local comprehensive plans (2007-2017)

Strengths

The Middle Georgia region has a variety of strengths, generally including its transportation infrastructure, natural and cultural resources, and institutions of higher education. The lists below were developed in consultation with regional stakeholders who noted several high points; this list is not meant to be all inclusive. The concept of strengths generally includes features that are beneficial to the region, and that typically, can be influenced to some extent by local governments. In other words, these are the things that make Middle Georgia a good place to live and do business.

Transportation

- ❖ Ample Roadway, Interstate, and Railway Infrastructure
- ❖ Strategic Location with Air and Sea Access
- ❖ Middle Georgia Regional Airport

Utilities

- ❖ Water Supply (Especially for Macon Water Authority)



Figure 5 – Javors Lucas Lake, reservoir for the Macon Water Authority

Higher Education

- ❖ Numerous Colleges and Universities
- ❖ Central Georgia Technical College

Natural and Cultural Resources

- ❖ Ocmulgee National Monument
- ❖ Georgia National Fairground
- ❖ National Forests, State Parks, and Wildlife Refuges
- ❖ Abundant Rivers and Lakes
- ❖ Plentiful Land for Future Development
- ❖ Numerous Local Community Festivals
- ❖ Rich Musical, Artistic, and Historical Heritage
- ❖ Museum of Aviation
- ❖ Agribusiness



Figure 6 – High Falls State Park is one of many beautiful and natural sites throughout the region, attracting scores of visitors

Major Employers

- ❖ Robins Air Force Base
- ❖ Hospitals / Healthcare Industry



Figure 7 – Navicent Health in Macon is the second largest hospital in Georgia, and the region's only level I trauma center

Weaknesses

With strengths for the region, naturally, weaknesses are also present. Some of these factors may draw business away from Middle Georgia, but generally, these are areas where local leaders have some ability to enact positive change. Transportation systems sometimes have gaps and congestion. Utility systems are sometimes prone to failure. Among the most significant weaknesses is the lack of high-speed internet accessibility across the region. Similarly, the presence of a skills gap in the workforce is a major issue. These are not all inclusive of the potential weaknesses and challenges facing the region but mostly cover the largest challenges.

One additional challenge is an occasional lack of statistical data. Because so many measures are collected annually or over several years, and often come with a lag, it may be difficult to see the quick-moving changes in the regional economy (for good or for bad). While the full extent of this challenge is unknown, it is also worth mentioning as a potential weakness, though there is little can be done by the region itself.

Transportation Gaps

- ❖ Congestion in East-West Transportation
- ❖ Congested North-South Connection to Atlanta
- ❖ Industrial Sites Lacking Infrastructure (Especially Rail)
- ❖ Few Options for RAFB Access
- ❖ Public Transportation
- ❖ Community Gateways Need Aesthetic Improvements

Utilities

- ❖ Quality, Reliability, and Availability of Rural Utility Services
- ❖ Insufficient Natural Gas Availability
- ❖ Poor Telecommunications Infrastructure, Especially in Rural Areas

Labor and Employment

- ❖ Improvement Needed in K-12 Public Education
- ❖ Education Systems Perceived to be Working in Silos
- ❖ Skills Gap Between Workers and Jobs Available
- ❖ Low Retention of College Graduates

Regionalism

- ❖ Often in Competition with Atlanta Region
- ❖ Lack of Regional Cooperation in Middle Georgia

Opportunities

Opportunities for Middle Georgia are based on the occurrence of events, activities, or initiatives that have happened recently, are happening now, or could happen in the very near future. Generally, these are positive developments that can potentially spur now job growth, new lines of business, or improvements to quality of life within the region. More often than not, the region may not have internal control over what happens, or that level of control may be limited to smaller influencing activities. Nevertheless, the opportunities for the region can be significant for their end impact on Middle Georgia. Once again, this list was compiled with the assistance of local stakeholders, and discusses some of the major regional opportunities, but does not represent an all-inclusive list. Among the most significant opportunities for the region are the aerospace and logistics industries.



Figure 8 – The Griswoldville Park is among the largest unoccupied industrial sites in the region, but currently lacks a much-needed rail spur that could attract new industry.



Figure 9 – Leaders in Middle Georgia piece together the region with a focus on local strengths and assets.

Aerospace

- ❖ Runway Extension at Middle Georgia Regional Airport
- ❖ Commercial Flights from Middle Georgia Regional Airport
- ❖ Flight Training Programs at Macon Downtown Airport
- ❖ Unmanned Aerial Vehicles (UAVs or Drones)

Surface Transportation

- ❖ Improvements to I-75/I-16 Interchange
- ❖ Leverage Fall Line Freeway and Import-Export Highway
- ❖ Reduce Atlanta Traffic by Sending Through Middle Georgia Instead
- ❖ Savannah Harbor Expansion Project
- ❖ Network Georgia Inland Port Initiative
- ❖ Rail Connection to Atlanta, Other Hub Cities in Georgia and Southeast
- ❖ Transportation Sales Tax Funding Opportunity



Figure 10 – GDOT Renderings of Proposed Improvements to the I-75/I-16 Interchange. Improvements can be expected to improve transportation efficiency, including the movement of freight through the region.

Emerging Economic Sectors

- ❖ Film Industry in Georgia
- ❖ Ecotourism, particularly from Ocmulgee National Park and Preserve Initiative
- ❖ Cybersecurity and Communication Logistics Industries

Workforce Development

- ❖ Small Business Incubators
- ❖ College and Career Academies
- ❖ Dual Enrollment and Move on When Ready
- ❖ Business Education Partnership
- ❖ The Leader in Me Program

Robins Air Force Base

- ❖ Mercer Engineering Research Center (MERC)
- ❖ BRAC – Potential to Gain Jobs and Missions



Figure 11 – The FireStarter Fab Lab in Warner Robins is connected to the Houston County Career Academy and serves a dual purpose of educating students in technical and mechanical skills while also allowing local entrepreneurs to experiment with concepts and designs.

Threats

Lastly, with opportunities for the region, also come threats. Similar to the opportunities, these threats may not be easily controlled by leaders within the region, but they still pose a challenge in the future for recruitment of new businesses and industries. Perceptions of run-down or blighted neighborhoods or perceptions of high crime can drive companies away. There are also many threats to the workforce: the persistence of a skills gap, drug usage (which makes it harder for businesses to find employees), and a loss of talented individuals to retirement or other parts of the state. Finally, base realignment and closure may be another significant threat in the future.

Blight

- ❖ Pockets of Blight and Run-Down Neighborhoods
- ❖ Contaminated Brownfield Sites
- ❖ Perceptions of Crime

Transportation

- ❖ Lack of Public Transportation Access

Workforce

- ❖ Skills Gap Between Workers and Jobs Available
- ❖ Drug Use and Addiction
- ❖ Generally Aging Workforce
- ❖ Brain Drain

Utilities

- ❖ Unsatisfactory Access to Broadband
- ❖ Loss of Capacity for Solid Waste Disposal and Recycling

Economic Diversity

- ❖ Lack of Economic Diversity in Many Communities
- ❖ Potential Loss of Anchor Employers

Regionalism

- ❖ Erosion of Cooperation and Trust Among Communities

Defense Industry Realignment

- ❖ Loss of Defense Contracts to Out-Of-Region Industries
- ❖ BRAC – Potential to Lose Missions and Jobs



Figure 12 – Blighted structures can be very hard to abate, but they can leave a negative impression on industrial prospects or tourists in the community.



Figure 13 – Kaolin mining has been an economic driver in Twiggs and Wilkinson counties, but job losses can have a significant negative impact.

A Special Note on Economic Resiliency

As noted by the U.S. Economic Development Administration, “regional economic prosperity is linked to an area’s ability to prevent, withstand, and quickly recover from major disruptions to its economic base.” While this emphasis has come to the federal regulatory level relatively recently, it has been a topic of interest throughout Middle Georgia for quite some time, particularly in terms of withstanding and avoiding economic threats from recessions and losses of major employers. A challenge for the region is remaining focused on these issues and building leadership capacity to take actions that may be politically challenging.

Further Discussion of Threats

The regional SWOT analysis identified a number of threats to economic growth and development throughout the region. These threats build the base of concerns regarding the region’s resiliency and mainly contain long-range concerns that can have continual incremental impacts to the ability to recruit and retain business and industry. Also included are the potential events that can cause sudden and paralyzing shocks through the economy. The majority of this CEDS focuses on the first category of threats—including both ways to incrementally address concerns like rural infrastructure while taking advantage of other opportunities in the meantime and despite the region’s potential threats. The following subsections will focus more in depth on the sudden shocks that may be harder to anticipate but can still have even larger adverse impacts.

It should also briefly be noted that the stakeholders of the CEDS Strategy Committee did not explicitly mention natural disasters as a threat, though they obviously are within every community. Every community within Middle Georgia prepares a Pre-Disaster Mitigation Plan every five years discussing the threats posed by a variety of natural and manmade disasters. Commonly addressed topics are flooding, drought, tornados, thunderstorm winds, lighting, winter storms, and hazardous material spills. These plans can give additional information about disaster mitigation and response. However, few of these disasters would cripple the regional or local economies for an extended length of time. The exception, of course, would be catastrophic flooding or tornado events, which, though disruptive, are fairly uncommon.

Avoiding and Mitigating Economic Disruptions

In terms of potential economic disruptions, the types of shocks and strategies for mitigation will tend to vary across the region, with one major exception: Base Realignment and Closure (BRAC). Robins Air Force Base is by far the region’s largest employer and is the largest single-site industrial complex in the entire state. In 2016, RAFB projections showed a \$2.86 billion economic impact by the base on the State of Georgia, including a direct federal payroll of \$1.32 billion annually. Currently, RAFB employs 21,462 individuals, approximately three-quarters of whom are civilians. Based on 2016 data and using an employment multiplier developed by Mercer University with the Middle Georgia Regional Commission, an additional 1.53 jobs are impacted in the region for each job lost or gained at Robins Air Force Base. In total, this accounts for a significant portion of



Figure 14 – An unmanned RQ-4 Global Hawk arrived at Robins AFB in May 2017 for paint work. RAFB was the first air logistics complex to receive a Global Hawk aircraft. Maintenance, repair, and overhaul (MRO) work is among the most significant activities to occur on Robins Air Force Base.



Figure 15 – An overview of the encroachment area near RAFB.

employment and economic activity in the region. For example, 20 percent of all employed persons in Houston County, and 8 percent of all employed persons in Middle Georgia work directly at Robins Air Force Base. Considering indirect jobs, those percentages rise to 52 and 20 percent, respectively of all jobs tied to RAFB, either directly or indirectly. As such, BRAC represents a massive threat to the communities of Middle Georgia but can be an opportunity if Middle Georgia once again gains missions as RAFB did in 2005.

The first priority of the Middle Georgia community is to avoid being considered for realignment or closure at all. In the mid-1990s, RAFB was on the BRAC list for evaluation twice, including, at one time, being recommended for realignment by the Secretary of Defense. The region responded by creating the Robins 21st Century Partnership to defend the base and region during the BRAC process. These efforts proved successful in allowing the base to survive in 1993 and 1995 while thriving during the 2005 BRAC. The region continues its focus on continual improvement to make RAFB an ever more attractive location for the United States Air Force.

In 2012 and 2013, the Middle Georgia Regional Commission worked with the Robins 21st Century Partnership to conduct a series of readiness analyses of the Middle Georgia community compared to other installations across the country on the factors considered by previous BRAC commissions. While these studies have been kept confidential, so as to not publicly disclose the region's weaknesses related to BRAC, the region remains focused on making improvements where needed. One very public instance of this has been the purchase of properties with non-compatible uses within the Robins Air Force Base encroachment zone. Under the leadership of the Central Georgia Joint Development Authority (CGJDA), the density of residential properties within the runway's Accident Potential Zones has been reduced to an acceptable level. Further, the CGJDA is now working with RAFB and Georgia Power to install solar panels capable of generating 139 megawatts of electricity which will be supplied to RAFB.

There is also an imperative for economic diversification within the region so that if the worst-case scenario were to ever occur, Middle Georgia would be better poised to mitigate the economic damage. This doesn't mean reducing the number of employees in the defense sector, but rather increasing employment in other parts of the economy. The commercial aerospace sector, for example, would be an ideal match for the region given the skill sets of workers already present due to RAFB. Similarly, the development of small business incubators, fab labs, and makerspaces can provide an infusion of entrepreneurship at the regional level that can lead to new job creation and industry diversification.

The defense industry presents the greatest need for diversification at the regional level, although smaller communities also need new jobs and opportunities to help diversify their economies. This is particularly beneficial when the new jobs created are in externally-traded sectors, such as manufacturing, instead of local service sectors. Aside from manufacturing and logistics, the film and tourism industries present opportunities for rural communities to capitalize on their rustic charm.

It is imperative for communities to focus on quality of life as an important part of their economic resiliency programs. More and more, the trend among younger workers has been to identify places where they want to live and seek jobs there, rather than moving for work opportunities. Projections from the Georgia Chamber predict that the majority of population growth will be clustered in the Atlanta metropolitan area over the next 15 years, with rural Georgia seeing the slowest rates of growth, including many counties with negative population growth. This is driven significantly by the living preferences of those born since 1981. If the Middle Georgia communities are able to focus on attracting young people, then the odds increase that companies will follow the talented workforce into these attractive communities. This would help to mitigate future job losses also while creating a more resilient and economically prosperous community.

While the region certainly hopes that major economic shocks can be avoided, Middle Georgia has in the past had to focus on economic recovery. Surely, the region has not suffered its last loss of a major employer. With this in mind, several principles should guide future recovery efforts.



Figure 16 – In 2015, MGRC launched the Middle Georgia Regional Leadership Champions program with the aim of building regional leadership capacity to handle significant regional challenges, like the loss of major employers in the aerospace and defense sector. The first cohort set a strategic direction of focusing on economic prosperity, education, and quality of life.

First, regional cooperation must be an overarching priority to address the challenges associated with major economic disruptions. Commuting patterns generally do not abide by the boundaries of counties and cities unless some other inhibiting factor coincides with it. In other words, citizens of Middle Georgia will frequently engage in some variety of economic activity in a location other than their place of residence: commuting to work, purchasing goods, or obtaining services. For this reason, there exists mutual benefit to cooperation with the end goal of securing regional wins rather than fighting against the efforts of neighboring communities.



Figure 17 - The 2017 MGRLC cohort in action learning about the principles of collective action



Figure 18 – When Macon-Bibb County was struck by the Mother’s Day tornado in 2008, they applied for a disaster recovery grant to help revitalize the downtown housing market rather than limiting themselves to the tornado’s path of destruction. Today, numerous new apartments, homes, and businesses are growing in the downtown area.

Second, economic developers should pursue innovative reuse of vacant properties when a major employer leaves or relocates. While the notion of creativity may not be universally recognized as a virtue in economic development, it’s necessary for recovery in many instances. If one widget manufacturer finds economic benefit in leaving their current location, the single-handed pursuit of new widget manufacturers may prove fruitless for the community. While this is not always practical, it underscores the overall theory that disaster is an opportunity to rebuild better, rather than rebuilding the same.

Finally, the region should actively pursue outside assistance in economic adjustment activities. Middle Georgia currently has a number of active federal grants to enhance the economic and workforce assets of the region in response to job losses throughout the region. This includes a grant through the Department of Defense Office of Economic Adjustment and a Department of Labor National Emergency Grant. These types of programs can be immensely helpful in not only providing rapid response to displaced workers but also in pursuing creative strategies for long-term stabilization and diversification. Taken together with active local efforts, communities can start to see gradual improvements.



Figure 19 - The Department of Defense OEA model of Organize, Plan, Implement has helped Middle Georgia address challenges resulting from the loss of defense contracts and associated jobs in the region.

Economic Prosperity Action Plan

The action plan of the CEDS details the highest priority projects, both large and small, which are essential for continued work toward economic prosperity within the region. Many of the regional priorities are listed, along with several localized priorities within each county. Each of these action items should be realistically accomplishable by the Middle Georgia Regional Commission or a local government of the region, provided that requisite support and cooperation are present from partner entities, such as boards of education or private businesses.

Middle Georgia Regional Activities

Sustaining Robins Air Force Base and the Defense Industry:

- ❖ Support mission and activities of 21st Century Partnership
- ❖ Continue to address encroachment of non-compatible uses near RAFB
- ❖ Enhance RAFB value to Department of Defense with energy security project
- ❖ Preserve attainment of regional air quality standards
- ❖ Address weaknesses identified in the Middle Georgia Readiness Analysis

Sustaining the defense industry of Middle Georgia, particularly as centered around Robins Air Force Base is essential the continued economic viability of many parts of the region. With over 21,000 employees, RAFB is by far the region's largest employer, and the loss of those jobs and contract opportunities would be the biggest threat facing the region. Local and regional economic development entities have recognized this, and have focused intensely on making RAFB the most attractive installation that it can be in the eyes of Department of Defense officials. While this work has been notable in recent years, particularly in the areas of air quality and encroachment. The momentum of these successes can carry through the next couple years as the Central Georgia Joint Development Authority works on a solar project to provide energy security and energy resiliency to RAFB without increasing pollutants in the air. With this said, more work remains to support RAFB and to address areas of concern for the base relating to potential future base realignments or closures.

Connecting a Skilled Workforce with Quality Jobs:

- ❖ Develop fab labs, makerspaces, and small business incubators
- ❖ Support development of college and career academies
- ❖ Create apprenticeship, internship, co-op, and work study opportunities
- ❖ Support transitioning veterans and the activities of the VECTR Center
- ❖ Retain talented workers and college graduates in Middle Georgia
- ❖ Teach soft skills to students and prospective employees
- ❖ Train toward the growing professions
- ❖ Recruit a portfolio of sustainable and high-paying jobs to the region



Figure 20 - The Georgia Veterans Education Career Transition Resource (VECTR) Center opened just over a year ago in Warner Robins and serves the entire State of Georgia. The VECTR Center is a tremendous asset in helping skilled veterans transition back into the workforce and secure good jobs in their local communities, including Middle Georgia.

Currently, the region is experiencing a significant disconnect between the workforce available to fill jobs and the jobs that need someone to fill them. Most commonly referred to as a skills gap, this leads to negative conditions for business growth, as well as continued unemployment for many individuals. Further, as the workforce

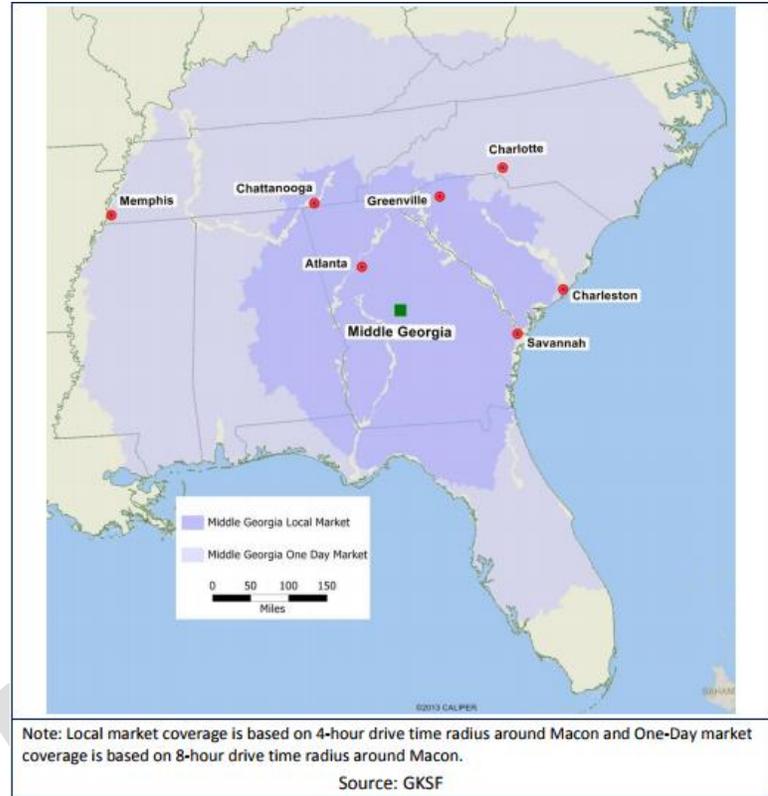
continues to age and skilled workers begin to retire, companies in Middle Georgia can expect this gap to only grow at an accelerated pace. Ultimately, the process of connecting skilled workers with quality jobs requires give and take from both the public and private sectors. Public support for fab labs, makerspaces, and college and career academies provide individuals with safe learning spaces to learn technical skills, even as students in the K-12 education system. Students who graduate with technical competencies will find themselves more likely to land lucrative jobs. Employers can also bear their share of the burden by making additional apprenticeship and internship opportunities available to young prospective workers. While this is an initial cost for many businesses, if done successfully, it becomes a worthwhile long-term investment. Finally, if the region can focus new industry recruitment on employers who bend the pay scale of the region up with quality, sustainable jobs, then increased wages can help retain skilled individuals within the region, provided they also have a satisfactory quality of life in their communities.

Developing the Freight and Logistics Industry:

- ❖ Improve major freight corridors
- ❖ Create truck bypasses as needed
- ❖ Develop an inland port with GPA under Network Georgia initiative
- ❖ Ensure rail accessibility of industrial sites
- ❖ Improve local roads, as needed, to handle freight traffic

Another major project for the Middle Georgia region is taking advantage of the opportunity to grow the freight and logistics industry within the region. In 2015, the Middle Georgia Regional Commission, with the support of local economic development entities, commissioned a study of the logistics capacity of the region. Given the region's strategic location, expansion of the freight and logistics industry had long been thought of as an opportunity. The study backed up this thinking of regional leaders, concluding:

The Middle Georgia region is poised to take advantage of macro-economic and freight industry trends, and achieve above-average growth in logistics activity ... To further highlight Middle Georgia's favorable position, the Georgia Ports Authority (GPA) is considering an "inland port" location in Middle Georgia ... This would substantially elevate the region's viability as a regional freight distribution center, adding the intermodal rail mode as an additional transportation option connecting domestic and international supply-chains ... Those that do operate in the Middle Georgia region endorse its capabilities ...



A number of the next steps for supporting this industry include continuing regional transportation improvements to support the flow of freight. In addition, the region has the opportunity to work with the Georgia Ports Authority to create an inland port in the region as part of their freight transportation system. This step would only further logistics growth in Middle Georgia.

Figure 21 - The local and one-day markets for the Middle Georgia region
Photo Credit: Middle Georgia Freight and Logistics Plan (2015)

Investing in Infrastructure:

- ❖ Expand broadband internet access
- ❖ Provide adequate water, sewer, electrical, and natural gas capacity for industry
- ❖ Provide reliable, quality community utility services, especially water and sewer services
- ❖ Ensure adequate solid waste disposal and recycling capacity

Beyond the region's transportation infrastructure, a number of utility services also need attention from local governments and private service providers. The greatest need is for broadband internet access, especially in rural communities. Currently, the low density of population in many communities does not make it cost effective for private entities to supply high speed internet access throughout rural areas. This does not make high-speed internet any less of a need for the residents or businesses who may be too isolated for reliable, quality internet access. Internet and wireless communications are an even greater need for rural communities with technologies from telemedicine to e-commerce revolutionizing access to goods and services (both essential and enviable), provided that the technology is available to support it. This is an

area in which substantial outside assistance is needed in many communities to make service provision economical and feasible. As these opportunities become available, local governments will likely be seeking them out and pursuing them with ever-increasing vigor.

Similarly, many communities lack the density to support the water or sewer improvements that are necessary to attract new investments in industry or business. Like internet access, this is also a quality of life issue, with residents lacking access to reliable and quality services. Fortunately, a number of funding streams have already been made available for local governments to enhance services like water and sewer. Applying for those grants and loans is a continued priority for many communities, especially in low-income neighborhoods.



Figure 22 - Turning dirt on critical water line repairs in the City of Jeffersonville. In many small cities and counties like Jeffersonville, maintenance and upkeep of public utility systems is an essential yet costly endeavor.

Enhancing the Regional Aerospace Industry:

- ❖ Extend the Middle Georgia Regional Airport runway
- ❖ Upgrade and enhance other local and regional airports
- ❖ Coordinate cooperation between RAFB and MGRA for overflow work
- ❖ Provide flight training programs at higher education facilities
- ❖ Expand MRO work done in Middle Georgia, especially commercial aviation work

Much as the freight and logistics industry represents a key area for potential economic growth, so too does the aerospace industry. Due to the presence of Robins Air Force Base, a large number of employees exist in the region who are skilled in aircraft maintenance, repair, and overhaul work. This work is heavily slanted toward defense contracts, which makes the economy more



Figure 23 - The Middle Georgia Regional Airport is a hub for aerospace industry in the region. As seen above, there is also ample land area for expansion of industrial opportunities.

susceptible to major changes in private investment and employment as defense funding ebbs and flows. Adding additional lines of commercial aircraft work would enhance the region's economic resiliency in a quite natural context. Currently, the Middle Georgia Regional Airport is the largest airport in the region and has the largest concentration of aerospace industries surrounding it. Investments to extend the runway at the airport and

explore strategic opportunities for further industrial development can have significant benefits to the local and regional economies. With agreements in place between the Middle Georgia Regional Airport and RAFB to support each other to increase efficiency of maintenance, repair, and overhaul (MRO) work, this remains a key area of focus for regional investment.

Capitalizing on our Natural and Cultural Resources:

- ❖ Support the Ocmulgee National Park and Preserve Initiative
- ❖ Expand trails and greenways throughout the region
- ❖ Effectively market cultural and heritage assets, such as festivals and historic sites
- ❖ Support the tourist draws of the Georgia National Fairground and Museum of Aviation
- ❖ Leverage Camera Ready and Georgia Grown programs

Outside of the industrial sectors of the economy, Middle Georgia sees significant opportunities for tourism to drive businesses of the region. One of the identified assets for the region, as compared to more urbanized parts of the nation, is Middle Georgia's abundance of land and natural resources. Many people like short trips to more natural areas for hiking and biking or to experience the local culture of small towns. As Middle Georgia has these assets, the challenge which follows is to adequately conserve, support, enhance, and market these opportunities. The analysis of the Ocmulgee National Monument as a potential national park was entitled *Diamond in the Rough*, likely referring to the seemingly unknown gem in the heart of the region that is home to 17,000 years of continuous human habitation. This study, completed by the National Parks Conservation Association, projects that the creation of a new national park at Ocmulgee would generate over 1.1 million new visitors per year, generate over \$200 million in new economic activity annually, and support nearly 3,000 additional jobs.

While this represents the asset with what may be the largest potential for growth, a number of additional opportunities for new heritage tourism and eco-tourism exist all across the region, with programs such as Georgia Grown and assets like the Museum of Aviation, Georgia National Fairground, Rock Eagle, and the Hawkinsville Harness Racing Facility. In addition, Middle Georgia is home to state parks, national forests, and wildlife refuges. With actions to support these resources and further develop the tourism industry, Middle Georgia could see significant economic gains in this direction.

Investing in Communities:

- ❖ Provide quality, affordable housing for the workforce
- ❖ Provide quality, affordable student housing, including for the VECTR Center
- ❖ Remediate blight in the community
- ❖ Redevelop downtown areas
- ❖ Clean up and redevelop brownfield sites
- ❖ Improve community entrances and gateways



Figure 24 - Festival Park in Fort Valley was once a contaminated former industrial site that today has been redeveloped into a central focal point of the community

Last, but not least among regional projects is the need to invest in the local communities of the region. Particularly, this includes the assurance of high quality and appropriate housing that suits the needs of a diverse population. It also means cleaning up blighted areas of the community to highlight our regional pride in the assets and people of Middle Georgia. These actions show the southern hospitality that makes Middle Georgia a warm and welcoming region, and a place where people will want to live and bring along their businesses.



Figure 25 – Downtown living is a growing trend, especially among young professionals. Macon-Bibb County is one community that has invested heavily in downtown redevelopment to attract new businesses and residents.

Special Projects: Baldwin County

Baldwin County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Baldwin County, the City of Milledgeville, Development Authority of Milledgeville-Baldwin County, Milledgeville-Baldwin County Chamber of Commerce, Milledgeville-Baldwin County Convention and Visitors Bureau, Milledgeville Main Street, Milledgeville Downtown Development Authority, Central State Hospital Local Redevelopment Authority, Sinclair Water Authority, Fall Line Regional Development Authority, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Develop and enhance Fall Line Industrial Park with Wilkinson County
- ❖ Enhance Milledgeville-Baldwin County industrial property
- ❖ Make improvements to Baldwin County Airport
- ❖ Develop and construct a convention/conference center
- ❖ Redevelop Central State Hospital property
- ❖ Create and market county-wide vision

Special Projects: Crawford County

Crawford County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Crawford County, the City of Roberta, Development Authority of Crawford County, Roberta-Crawford County Chamber of Commerce, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Construct new speculative building
- ❖ Expand current industrial park for more available land
- ❖ Establish small business development program
- ❖ Establish downtown development authority and/or Main Street program

Special Projects: Houston County

Houston County and each of its cities collaboratively identified several unique projects to undertake within the county and respective cities. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Houston County, the City of Centerville, the City of Perry, the City of Warner Robins, Robins Air Force Base, Georgia VECTR Center, Houston County Development Authority, Warner Robins Development Authority, Robins Regional Chamber of Commerce, Warner Robins Convention and Visitors Bureau, Warner Robins Redevelopment Agency, Perry Area Chamber of Commerce, Perry Convention and Visitors

Bureau, Perry Main Street, Perry Downtown Development Authority, Perry-Houston County Airport Authority, Houston County Hospital Authority, I-75 Corridor Council, Joint Development Authority of Peach County and the City of Warner Robins, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide:

- ❖ Continue development of publicly-owned industrial sites
- ❖ Support economic development efforts to diversify the local economy
- ❖ Support and coordinate efforts to identify, purchase, and develop future industrial sites
- ❖ Expand public transportation opportunities countywide
- ❖ Continue widening of Hwy 96 to Interstate 16
- ❖ Support development and marketing of I-75 Corridor

City of Centerville:

- ❖ Develop Center Park and develop and market Town Center
- ❖ Become a GICH (Georgia Initiative for Community Housing) community in 2018
- ❖ Work with Houston Co. Development Auth. to enhance and expand industrial inventory

City of Perry:

- ❖ Develop and market smaller commercial buildings (~10,000 sf).
- ❖ Enhance downtown as viable commercial center with additional public infrastructure
- ❖ Enhance downtown with quality infill development and redevelopment projects
- ❖ Ensure adequate water, sewer, and natural gas capacity for customers
- ❖ Expand wastewater and natural gas infrastructure for airport and surrounding properties
- ❖ Enhance Perry-Houston County Airport and support its continued growth
- ❖ Maintain current or expand new Opportunity Zone
- ❖ Work with Houston Co. Development Auth. to enhance and expand industrial inventory

City of Warner Robins:

- ❖ Construct Warner Robins Welcome Center
- ❖ Redevelop Warner Robins TAD, including streetscape improvements
- ❖ Create Warner Robins Town Center with multifamily, light industrial, office, retail and entertainment district, and attract developers for a Hotel and Conference Center
- ❖ Market and enhance Donald Walker Business Park
- ❖ Launch Fiber City with 1Gbps+ open broadband network
- ❖ Increase workforce and student housing to support colleges and RAFB
- ❖ Partner with VECTR Center to support mixed use development in surrounding area
- ❖ Increase capital for business growth among small and medium business enterprises, as well as women-owned, minority-owned, and veteran-owned businesses
- ❖ Develop encroachment property on north end of RAFB for industrial use
- ❖ Coordinate with RAFB and DoD to develop city-owned land on north end of RAFB
- ❖ Extend sewer service to Houston County Rail Site on AE Harris Road
- ❖ Support development of I-75 Corridor with Peach County and I-75 Corridor Council

Special Projects: Jones County

Jones County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Jones County, the City of Gray, Jones County Development Authority, Main Street Gray, Downtown Development Authority of Gray, Gray-Jones County Chamber of Commerce, Jones County People Looking Ahead Now, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Complete improvements to Griswoldville Industrial Park, including rail spur and sewer
- ❖ Secure GRAD certification of Griswoldville Park
- ❖ Increase industrial site advertising
- ❖ Improve downtown business corridor

Special Projects: Macon-Bibb County

Macon-Bibb County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Macon-Bibb County, Macon-Bibb County Industrial Authority, Macon Economic Development Commission, Macon Chamber of Commerce, Macon-Bibb County Urban Development Authority, NewTown Macon, Macon Arts Alliance, Main Street Macon, Macon-Bibb County Convention and Visitors Bureau, Macon Water Authority, Ocmulgee National Monument, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Implement comprehensive workforce development program
- ❖ Implement business retention and expansion program
- ❖ Continue development of south Macon-Bibb industrial district
- ❖ Make improvements at Middle Georgia Regional Airport
- ❖ Redevelop brownfield sites in downtown industrial district
- ❖ Enhance redevelopment of Second Street Corridor
- ❖ Redevelop the Ocmulgee Crossings TAD area
- ❖ Transportation improvements in Ocmulgee East Industrial Park

Special Projects: Monroe County

Monroe County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Monroe County, the City of Culloden, the City of Forsyth, Development Authority of Monroe County, Forsyth-Monroe Chamber of Commerce, Forsyth Convention and Visitors Bureau, Forsyth Main Street, Downtown Development Authority of Forsyth, Georgia Public

Safety Training Center, State Offices South at Tift College, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Target light manufacturing and warehouse/distribution businesses
- ❖ Pursue public safety businesses and industries to complement existing employers
- ❖ Market Meridian 75 Logistics Center
- ❖ Support entrepreneurial business opportunities
- ❖ Improve electrical capacity of Monroe County Industrial Park
- ❖ Support education system in their initiatives to increase the skilled workforce

Special Projects: Peach County

Peach County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Peach County, the City of Byron, the City of Fort Valley, Development Authority of Peach County, Peach Regional Chamber of Commerce, Byron Convention and Visitors Bureau, Byron Main Street, Byron Downtown Development Authority, Byron Development Authority, Fort Valley Main Street, Fort Valley Downtown Development Authority, I-75 Corridor Council, Joint Development Authority of Peach County and the City of Warner Robins, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Support development of I-75 Corridor with Houston County and I-75 Corridor Council
- ❖ Fill spec building in South Peach Industrial Park
- ❖ Undertake improvements to John A. Demons Industrial Park
- ❖ Pursue professional, managerial, and high-tech jobs
- ❖ Revitalize downtown areas and capitalize on public parks and plazas
- ❖ Address substandard housing concentrations
- ❖ Improve lodging options and recruit a conference center to Fort Valley

Special Projects: Pulaski County

Pulaski County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Pulaski County, the City of Hawkinsville, Pulaski County-Hawkinsville Development Authority, Hawkinsville-Pulaski County Chamber of Commerce, Hawkinsville Downtown Development Authority, Hawkinsville Main Street, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Focus on retention of young adults in community
- ❖ Develop coordinated marketing and branding campaign for city and county
- ❖ Revitalize downtown Hawkinsville and clean up abandoned sites

- ❖ Attract micro-industry to Hawkinsville
- ❖ Expand and improve Hawkinsville-Pulaski County Airport

Special Projects: Putnam County

Putnam County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Putnam County, the City of Eatonton, Putnam Development Authority, Eatonton Downtown Development Authority, Eatonton Main Street, Eatonton-Putnam Chamber of Commerce, Eatonton-Putnam Water and Sewer Authority, Sinclair Water Authority, Lake Oconee Area Development Authority, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Upgrade infrastructure in South Industrial Park
- ❖ Obtain GRAD certification of 121-acre site in South Industrial Park
- ❖ Implement CIDs, BIDs, or TADs to aid development efforts
- ❖ Develop arts and heritage tourism program
- ❖ Promote support network for retirees
- ❖ Increase presence of retail industry
- ❖ Support construction and homebuilding industry in Putnam County

Special Projects: Twiggs County

Twiggs County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Twiggs County, the City of Danville, the City of Jeffersonville, Development Authority of the City of Jeffersonville and Twiggs County, Downtown Development Authority of the City of Jeffersonville, Twiggs County Chamber of Commerce, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Further develop publicly-owned industrial parks and sites
- ❖ Acquire additional industrial property
- ❖ Continue improvements to Jeffersonville water and wastewater systems
- ❖ Pursue quality of life enhancements, especially related to housing, healthcare, and retail
- ❖ Support downtown development in Jeffersonville
- ❖ Further workforce development activities through collaboration with board of education
- ❖ Support business recruitment and retention

Special Projects: Wilkinson County

Wilkinson County has identified several unique projects to undertake within the county. The county also seeks to accomplish and support the regional goals and projects that have the

potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Wilkinson County, the City of Allentown, the City of Gordon, the City of Irwinton, the City of Ivey, the City of McIntyre, the City of Toombsboro, Development Authority of Wilkinson County, Wilkinson County Chamber of Commerce, Gordon Better Hometown, Fall Line Regional Development Authority, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

- ❖ Develop and enhance Fall Line Industrial Park with Baldwin County
- ❖ Support development of Balls Ferry State Park
- ❖ Ensure adequate utility infrastructure for potential industries
- ❖ Market publicly-owned industrial sites
- ❖ Develop additional entertainment options

Evaluation Strategies

A last component required of the CEDS is a strategy on how to evaluate the successfulness of economic development efforts undertaken throughout the region. A variety of proposed measures of success are described below—some of which concrete statistical measures and others of which are more abstract measures of capacity.

Statistical Measures

There are several useful statistical measures for evaluating the impact of economic development initiatives in the Middle Georgia region. The first and most obvious measurements are the short-term numbers of jobs created or retained and private investment in the community. Frequently, positive trends of new investment and new jobs are indicators of a growing regional economy and of successful economic development efforts. These statistics can be viewed on an annual basis and can most effectively illustrate the small wins of economic development.

In the longer run, the combination of repetitive small wins can show a broader collective impact on some of the key statistical trends noted earlier in background section of the CEDS. While data may be difficult to discern from one year to the next, over the five-year planning life of this CEDS, the region can look to see improvement in these areas. Specifically, a reduction in poverty, lower rates of unemployment, and greater levels of educational attainment will highlight an increase in regional economic prosperity. If Middle Georgia's efforts are successful, the region should see a more diverse base of employment with higher average wages, and the region should rate better in regard to regional innovation.

Measuring Capacity

While the above statistical measures are beneficial in providing hard data, that perspective does not always reflect success in its entirety. Communities can sometimes get lucky with prospects despite poor planning, but in other instances, the best laid plans can fall through due to circumstances beyond their control. For this reason, it is also helpful to measure capacity for future growth as an indicator of successful efforts in the field of economic development. Most significantly, this includes an analysis of the resources available for future growth, such as available industrial sites or buildings, especially those that have the Georgia Ready for Accelerated Development (GRAD) designation. Industrial parks throughout the region lack the infrastructure to support immediate development, but companies may be ready to move quickly once their ideal location is found. The addition of a rail spur or road, utility services, and completed environmental studies are real successes for many Middle Georgia communities, especially in rural parts of the region; business support services can be another measure of success.

Beyond this is the willingness, by either public or private entities, to invest locally in capacity building for economic growth. The ability to take these actions varies greatly from one community to the next, but the commitment of local match is a precursor to nearly all large-scale economic development projects. The extent to which grants are awarded within the Middle Georgia region, including the leveraging of local funds, is another prime indicator of success. This is not to say that spending money itself is a success, but if properly directed as part of a well-developed strategy with local support, it can be an extremely beneficial and even necessary precursor to future growth.

A Final Word on Evaluation

The preceding measures can all be helpful tools to determine if the investment of EDA is having a positive impact on Middle Georgia. The answer to that question over the next five years will likely be a resounding “yes.” However, as the statistical measures from the beginning of this strategy noted, Middle Georgia is behind many other parts of the state and the nation. While the general economic improvement of the last five years is a welcomed trend in Middle Georgia and across the nation, continued improvement alone cannot be the sole measure of economic prosperity within Middle Georgia. The strongest case for progress that can be proved is if the statistical measures begin to close their gaps in performance between Middle Georgia and other regions of the country in the years ahead. This is the region’s most ambitious goal: not only to survive in the years ahead, but also to thrive.

Appendix – Data Tables

Table 1 -- Projected Population Change (2010 - 2050)

County	2010	2015	2020	2025	2030	2040	2050	Avg Annual Prct Change
Baldwin	45,700	45,460	46,760	48,080	49,330	51,230	52,410	0.37%
Crawford	12,610	12,390	13,150	13,950	14,760	16,320	17,770	1.02%
Houston	140,750	150,030	157,890	166,120	174,410	189,640	203,090	1.11%
Jones	28,630	28,490	30,850	33,400	36,080	41,530	47,080	1.61%
Macon-Bibb	155,590	153,720	155,230	156,170	157,860	158,030	155,810	0.00%
Monroe	26,470	27,100	29,160	31,370	33,670	38,270	42,840	1.55%
Peach	27,750	26,720	27,810	28,930	30,040	31,930	33,440	0.51%
Pulaski	11,920	11,400	11,550	11,710	11,840	11,940	11,870	-0.01%
Putnam	21,200	21,350	22,150	22,960	23,720	24,900	25,640	0.52%
Twiggs	8,960	8,390	8,420	8,450	8,460	8,360	8,140	-0.23%
Wilkinson	9,520	9,150	9,210	9,260	9,290	9,230	9,030	-0.13%
Region	489,100	494,200	512,180	530,400	549,460	581,380	607,120	0.60%
Georgia	9,713,450	10,214,860	10,880,530	11,594,580	12,339,170	13,814,540	15,276,950	1.43%
United States	309,346,810	321,420,590	336,382,530	352,314,550	368,644,060	399,418,770	428,118,940	0.96%

Source: Woods & Poole Economics, 2017

Table 2 -- Projected Median Age (2010 - 2050)

County	2010	2015	2020	2025	2030	2040	2050
Baldwin	33.54	34.59	34.23	33.92	35.61	36.64	36.80
Crawford	41.64	43.96	44.29	43.93	43.20	43.67	43.09
Houston	34.48	35.20	36.10	36.95	37.95	39.24	40.18
Jones	38.84	40.35	41.06	41.62	41.13	42.16	43.60
Macon-Bibb	35.58	35.95	36.31	36.89	37.92	38.72	38.60
Monroe	41.38	43.07	43.84	43.74	43.34	44.35	44.71
Peach	33.34	36.18	37.49	38.39	39.49	39.64	38.39
Pulaski	41.19	43.39	43.65	43.52	43.75	44.73	45.21
Putnam	43.61	45.70	46.92	46.86	46.90	47.49	46.92
Twiggs	45.16	47.20	47.21	45.84	45.03	44.62	43.36
Wilkinson	41.08	42.67	41.38	40.83	39.87	38.46	37.89
Georgia	35.40	36.30	36.78	36.95	37.46	38.57	39.39
United States	37.20	37.80	38.30	38.74	39.28	40.00	40.24

Source: Woods & Poole Economics, 2017

Table 3 -- Job Tax Rankings

County	Tax Credit Ranking
Baldwin	15
Crawford	108
Houston	137
Jones	136
Macon-Bibb	91
Monroe	144
Peach	73
Pulaski	87
Putnam	101
Twiggs	39
Wilkinson	79

Source: GA DCA 2017 Rankings

Note: Counties ranked from 1 (most economically distressed in state) to 159 (least economically distressed in state).

Table 4 -- Wages (non-adjusted) and Wage and Salary Employment by County (1970 - 2015)

County	Description	1970	1980	1990	2000	2010	2015	Avg Annual Prct Change
Baldwin	Wage & salary employment	11,733	15,696	19,455	19,976	16,835	16,656	0.93%
	Avg. wages and salaries	\$ 4,869	\$ 10,942	\$ 17,750	\$ 24,130	\$ 31,064	\$ 33,973	13.28%
Crawford	Wage & salary employment	1,133	1,144	1,240	1,644	1,435	1,523	0.76%
	Avg. wages and salaries	\$ 3,355	\$ 7,592	\$ 12,603	\$ 20,409	\$ 29,664	\$ 34,051	20.33%
Houston	Wage & salary employment	38,594	37,018	44,838	52,181	64,686	63,858	1.45%
	Avg. wages and salaries	\$ 7,585	\$ 14,195	\$ 21,374	\$ 31,405	\$ 44,300	\$ 46,144	11.30%
Jones	Wage & salary employment	2,110	2,140	2,872	3,602	3,977	4,948	2.99%
	Avg. wages and salaries	\$ 3,978	\$ 9,171	\$ 15,713	\$ 23,262	\$ 30,972	\$ 33,628	16.56%
Macon-Bibb	Wage & salary employment	60,006	67,868	84,055	96,641	85,675	90,130	1.12%
	Avg. wages and salaries	\$ 5,481	\$ 11,907	\$ 21,035	\$ 29,721	\$ 38,149	\$ 42,459	14.99%
Monroe	Wage & salary employment	4,164	6,750	6,031	5,539	6,735	8,074	2.09%
	Avg. wages and salaries	\$ 3,907	\$ 11,948	\$ 16,562	\$ 25,078	\$ 36,468	\$ 37,751	19.25%
Peach	Wage & salary employment	4,887	6,728	7,848	9,075	8,405	9,645	2.16%
	Avg. wages and salaries	\$ 4,247	\$ 10,709	\$ 19,148	\$ 26,811	\$ 33,053	\$ 37,787	17.55%
Pulaski	Wage & salary employment	2,775	2,521	2,801	3,499	3,126	3,238	0.37%
	Avg. wages and salaries	\$ 3,513	\$ 8,141	\$ 14,067	\$ 24,046	\$ 31,037	\$ 33,907	19.23%
Putnam	Wage & salary employment	3,030	4,172	4,932	6,926	6,655	5,721	1.97%
	Avg. wages and salaries	\$ 4,003	\$ 11,243	\$ 17,531	\$ 25,465	\$ 30,026	\$ 32,094	15.59%
Twiggs	Wage & salary employment	2,042	2,224	2,163	1,913	1,234	1,213	-0.90%
	Avg. wages and salaries	\$ 5,842	\$ 14,315	\$ 26,633	\$ 35,278	\$ 33,293	\$ 36,132	11.52%
Wilkinson	Wage & salary employment	2,674	3,346	3,672	3,568	3,120	3,360	0.57%
	Avg. wages and salaries	\$ 5,424	\$ 13,342	\$ 24,350	\$ 32,658	\$ 43,290	\$ 48,574	17.68%
Regional	Wage & salary employment	133,148	149,607	179,907	204,564	201,883	208,366	1.26%
	Avg. wage per job	\$ 5,830	\$ 12,233	\$ 20,319	\$ 29,023	\$ 38,762	\$ 41,884	13.74%
Georgia	Wage & salary employment	1,849,605	2,377,591	3,182,256	4,132,965	4,032,763	4,440,645	3.11%
	Avg. wage per job	\$ 5,890	\$ 12,497	\$ 21,900	\$ 34,316	\$ 44,924	\$ 50,519	16.84%
United States	Wage & salary employment	78,793,000	97,646,000	116,544,000	137,610,000	135,526,000	147,634,000	1.94%
	Avg. wage per job	\$ 6,922	\$ 13,999	\$ 23,423	\$ 35,054	\$ 46,994	\$ 53,162	14.84%

Source: Bureau of Economic Analysis, 2015

Table 5 -- Poverty (last 12 months)

County	Individuals Below Poverty Level	Households Receiving Food Stamps/SNAP	Median Household Income
Baldwin	31.4%	16.3%	\$32,460
Crawford	17.2%	19.5%	\$41,825
Houston	17.2%	14.0%	\$53,270
Jones	16.8%	16.3%	\$51,857
Macon-Bibb	27.4%	23.2%	\$36,519
Monroe	13.6%	15.1%	\$48,744
Peach	21.9%	24.5%	\$41,588
Pulaski	19.2%	21.9%	\$38,750
Putnam	16.4%	16.0%	\$44,299
Twiggs	27.7%	18.7%	\$30,468
Wilkinson	17.7%	14.3%	\$38,485
Georgia	18.4%	15.5%	\$49,620
United States	15.5%	13.2%	\$53,889

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

County	Commute within County	Commute out of County	Commute into County
Baldwin	6,013	8,104	7,901
Crawford	568	4,232	870
Houston	20,913	26,113	19,025
Jones	1,727	9,130	2,672
Macon-Bibb	31,546	21,721	46,609
Monroe	1,903	7,764	5,856
Peach	2,098	6,922	6,208
Pulaski	883	2,166	1,729
Putnam	2,054	5,061	2,921
Twiggs	401	2,965	3,001
Wilkinson	892	2,564	2,087

Source: U.S. Census Bureau, Center for Economic Studies, 2014

County	Prct in Labor Force	Unemployment Rate
Baldwin	47.5%	8.4%
Crawford	54.0%	11.0%
Houston	56.0%	9.7%
Jones	60.0%	9.5%
Macon-Bibb	57.3%	12.4%
Monroe	55.7%	10.5%
Peach	59.9%	11.3%
Pulaski	44.3%	7.4%
Putnam	53.7%	6.3%
Twiggs	39.5%	6.7%
Wilkinson	47.6%	7.3%
Region	55.1%	10.3%
Georgia	63.0%	9.7%
United States	63.7%	8.3%

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

County	Less than 9th Grade	Some HS, No Diploma	HS Grad (or equivalent)	Some College No Degree	Associate's Degree	Bachelor's Degree	Graduate/ Prof. Degree
Baldwin	4.8%	12.6%	39.0%	19.6%	6.2%	9.2%	8.6%
Crawford	7.6%	14.1%	35.6%	24.4%	5.4%	8.4%	4.4%
Houston	3.3%	7.2%	30.0%	26.1%	10.1%	14.3%	9.1%
Jones	3.2%	10.1%	37.3%	22.0%	7.7%	12.2%	7.5%
Macon-Bibb	4.7%	12.1%	32.6%	21.1%	5.7%	14.5%	9.3%
Monroe	4.4%	13.9%	35.4%	19.6%	5.4%	12.2%	9.1%
Peach	5.9%	9.0%	30.1%	27.5%	6.5%	13.2%	7.7%
Pulaski	7.4%	11.7%	43.6%	16.3%	8.9%	6.2%	5.9%
Putnam	6.0%	9.5%	39.0%	19.1%	8.9%	12.4%	5.1%
Twiggs	10.6%	21.0%	38.7%	15.3%	4.6%	6.0%	3.8%
Wilkinson	6.2%	12.6%	51.2%	16.4%	6.2%	3.9%	3.5%
Region	4.6%	10.6%	33.9%	22.4%	7.4%	12.8%	8.3%
Georgia	5.4%	9.2%	28.4%	21.0%	7.2%	18.1%	10.7%
United States	5.7%	7.6%	27.8%	21.1%	8.1%	18.5%	11.2%

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

County	Less than HS Grad	HS Grad (or equivalent)	Some College or Associate's	Bachelor's or Higher
Baldwin	9.1%	22.7%	62.1%	6.0%
Crawford	25.8%	21.6%	45.1%	7.5%
Houston	13.5%	36.7%	43.6%	6.2%
Jones	18.9%	40.7%	38.6%	1.8%
Macon-Bibb	17.6%	35.2%	41.4%	5.8%
Monroe	25.7%	31.8%	32.7%	9.7%
Peach	8.7%	23.3%	63.0%	5.0%
Pulaski	21.9%	41.6%	34.0%	2.5%
Putnam	17.4%	46.7%	30.8%	5.1%
Twiggs	28.8%	46.3%	24.7%	0.2%
Wilkinson	13.1%	42.5%	40.3%	4.1%
Region	15.1%	33.1%	46.1%	5.7%
Georgia	17.6%	31.0%	43.5%	7.9%
United States	14.4%	29.7%	46.1%	9.8%

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

Table 10 -- 4-Year Graduation Rate by School and District (2016)		
System Name	School Name	Graduation Rate
Baldwin County	Baldwin High School	86.1%
Crawford County	Crawford County High School	70.3%
Houston County	Veterans High School	90.8%
	Houston County High School	93.0%
	Perry High School	90.2%
	Northside High School	82.4%
	Warner Robins High School	85.9%
	<i>All Houston County Schools</i>	86.7%
Jones County	Jones County High School	85.9%
Macon-Bibb County	Howard High School	83.8%
	Central High School	74.5%
	Westside High School	67.3%
	Rutland High School	72.6%
	Northeast High School	73.7%
	Southwest High School	68.1%
	<i>All Macon-Bibb County Schools</i>	71.6%
Monroe County	Mary Persons High School	88.0%
Peach County	Peach County High School	91.0%
Pulaski County	Hawkinsville High School	74.4%
Putnam County	Putnam County High School	91.8%
Twiggs County	Twiggs County High School	80.0%
Wilkinson County	Wilkinson County High School	94.2%
Statewide	All Public Schools	79.4%

Source: Georgia Dept of Education, 2016 College and Career Ready Performance Index (CCRPI)

<i>Table 11 -- College Readiness (2016)</i>			
System Name	School Name	Prct Requiring Remediation	Prct Earning College Credit
Baldwin County	Baldwin High School	50.0%	55.3%
Crawford County	Crawford County High School	26.7%	30.3%
Houston County	Veterans High School	13.7%	73.9%
	Houston County High School	12.7%	81.9%
	Perry High School	23.6%	70.8%
	Northside High School	36.6%	66.5%
	Warner Robins High School	26.3%	61.4%
	<i>All Houston County Schools</i>	21.4%	70.7%
Jones County	Jones County High School	30.6%	51.2%
Macon-Bibb County	Howard High School	26.9%	67.9%
	Central High School	36.3%	67.9%
	Westside High School	62.2%	49.7%
	Rutland High School	46.7%	72.3%
	Northeast High School	79.9%	36.2%
	Southwest High School	55.6%	37.8%
	<i>All Macon-Bibb County Schools</i>	47.8%	57.9%
Monroe County	Mary Persons High School	21.9%	56.4%
Peach County	Peach County High School	24.5%	100.0%
Pulaski County	Hawkinsville High School	23.4%	72.3%
Putnam County	Putnam County High School	47.9%	69.9%
Twiggs County	Twiggs County High School	53.0%	82.0%
Wilkinson County	Wilkinson County High School	52.8%	63.7%
Statewide	All Public Schools	28.0%	64.8%

Source: Georgia Dept of Education, 2016 College and Career Ready Performance Index (CCRPI)

Table 12 -- 3rd Grade Reading Level

County	Percent of 3rd Grade Students Exceeding Reading Standards
Baldwin County	35.4%
Crawford County	48.9%
Houston County	55.0%
Jones County	52.3%
Macon-Bibb County	34.9%
Monroe County	63.2%
Peach County	33.8%
Pulaski County	39.6%
Putnam County	46.8%
Twiggs County	21.5%
Wilkinson County	37.8%
Georgia	51.0%

Source: Georgia Dept of Education, 2016 CCRPI

Note: Georgia Dept. of Education 3rd Grade reading standard equals a Lexile measure of 650 or above.

Table 13 -- Literacy Rate by County

County	Est. Population Age 16 and Over	Percent Lacking Basic Prose Literacy Skills
Baldwin	30,172	20%
Crawford	9,545	20%
Houston	88,076	13%
Jones	19,299	21%
Macon-Bibb	111,853	20%
Monroe	17,520	16%
Peach	17,915	21%
Pulaski	6,825	19%
Putnam	15,147	19%
Twiggs	7,966	25%
Wilkinson	7,727	23%
Georgia	6,365,942	17%
United States	216,000,000	14%

Source: U.S. Dept of Education, 2003 National Assessment of Adult Literacy

Table 14 -- Housing Stock By Type

County	Single Family		Multi-Family		Manufactured Homes		Total
	%	Count	%	Count	%	Count	
Baldwin	57.8%	9,235	21.3%	3,403	20.9%	3,339	15,978
Crawford	59.8%	2,714	3.4%	154	36.8%	1,670	4,538
Houston	76.7%	41,242	15.6%	8,388	7.6%	4,087	53,771
Jones	76.4%	7,889	4.3%	444	19.2%	1,983	10,326
Macon-Bibb	69.6%	39,749	27.4%	15,648	2.7%	1,542	57,111
Monroe	72.9%	6,985	9.2%	881	17.9%	1,715	9,581
Peach	70.7%	7,028	14.8%	1,471	14.5%	1,441	9,941
Pulaski	70.1%	2,767	6.7%	264	23.1%	912	3,947
Putnam	66.9%	5,661	4.6%	389	28.4%	2,403	8,462
Twiggs	57.1%	1,726	3.2%	97	39.7%	1,200	3,022
Wilkinson	64.6%	2,140	5.0%	166	30.3%	1,004	3,313
Region	70.6%	127,136	17.4%	31,307	11.8%	21,296	179,990
Georgia	71.7%	2,562,818	19.7%	704,149	8.6%	307,395	3,574,362
United States	68.9%	80,562,224	25.4%	29,699,281	5.9%	6,898,652	116,926,305

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

Table 15 -- Housing Cost

County	Median Home Value	Median Monthly Gross Rent
Baldwin	\$101,700	\$673
Crawford	\$85,800	\$701
Houston	\$132,400	\$850
Jones	\$129,300	\$819
Macon-Bibb	\$118,700	\$743
Monroe	\$153,300	\$729
Peach	\$124,600	\$687
Pulaski	\$100,700	\$625
Putnam	\$155,100	\$660
Twiggs	\$56,900	\$531
Wilkinson	\$71,500	\$571
Georgia	\$148,100	\$879
United States	\$178,600	\$928

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

County	Housing Units Lacking Complete Plumbing		Housing Units Lacking Complete Kitchen Facilities		No Telephone Service Available		Total
	%	Count	%	Count	%	Count	
Baldwin	0.5%	80	0.5%	80	2.3%	367	15,978
Crawford	0.0%	0	0.0%	0	10.4%	472	4,538
Houston	0.3%	161	0.4%	215	2.2%	1,183	53,771
Jones	0.6%	62	0.4%	41	2.6%	268	10,326
Macon-Bibb	0.5%	286	0.9%	514	3.1%	1,770	57,111
Monroe	0.9%	86	0.9%	86	2.1%	201	9,581
Peach	0.1%	10	0.2%	20	2.6%	258	9,941
Pulaski	2.2%	87	1.2%	47	3.7%	146	3,947
Putnam	0.0%	0	0.1%	8	1.3%	110	8,462
Twiggs	2.2%	66	1.5%	45	3.8%	115	3,022
Wilkinson	0.5%	17	0.5%	17	2.3%	76	3,313
Region	0.5%	855	0.6%	1,074	2.8%	4,968	179,990
Georgia	0.4%	14,297	0.7%	25,021	3.1%	110,805	3,574,362
United States	0.4%	467,705	0.9%	1,052,337	2.5%	2,923,158	116,926,305

Source: U.S. Census Bureau, 2011-2015 ACS 5-Year Estimates

County	Prct Individuals with Any High Speed Home Internet Access	Prct Individuals with Home Internet Usage (Last 30 Days)
Baldwin	75.4%	69.7%
Crawford	67.4%	60.1%
Houston	85.1%	81.0%
Jones	76.1%	70.2%
Macon-Bibb	78.2%	73.4%
Monroe	76.0%	70.0%
Peach	74.9%	68.1%
Pulaski	67.7%	60.8%
Putnam	73.4%	66.9%
Twiggs	58.9%	50.2%
Wilkinson	64.6%	56.8%
Georgia	81.8%	77.3%
United States	83.0%	78.7%

Source: ESRI 2017 Estimates, Electronics and Internet Market Potential

Table 18 -- Regional Employment by Type and Industry Sector (2001 - 2015)

Description	2001	2003	2005	2007	2009	2011	2013	2015
Total employment	237,892	244,269	256,450	265,552	259,993	259,285	263,828	267,073
By type								
Wage and salary employment	202,121	204,316	208,803	212,213	204,844	199,973	203,000	208,366
Proprietors employment	35,771	39,953	47,647	53,339	55,149	59,312	60,828	58,707
Farm proprietors employment	2,204	1,898	1,837	1,743	1,711	1,699	1,640	1,406
Nonfarm proprietors employment	33,567	38,055	45,810	51,596	53,438	57,613	59,188	57,301
By industry								
Farm employment	3,012	2,688	2,785	2,502	2,511	2,421	2,368	2,570
Nonfarm employment	234,880	241,581	253,665	263,050	257,482	256,864	261,460	264,503
Private nonfarm employment	181,708	186,366	197,648	205,364	199,836	200,078	207,295	211,012
Forestry, fishing, and related activities	354	354	335	303	384	289	114	170
Mining	1,237	1,048	1,003	1,137	1,020	1,165	1,185	1,176
Utilities	174	171	173	188	294	233	(D)	(D)
Construction	12,460	13,061	14,366	15,028	12,562	10,957	9,880	10,593
Manufacturing	24,185	21,299	20,142	19,059	16,549	15,008	15,096	16,574
Wholesale trade	5,209	1,500	1,709	5,536	5,187	4,669	3,979	4,022
Retail trade	27,676	28,318	28,723	29,403	27,984	29,661	30,008	30,366
Transportation and warehousing	1,248	5,658	2,652	2,672	3,265	3,472	3,555	3,786
Information	3,494	3,431	3,366	3,049	2,487	2,399	2,268	2,542
Finance and insurance	10,668	11,126	11,709	12,552	13,800	14,412	14,677	14,767
Real estate and rental and leasing	6,410	6,618	7,932	8,974	8,498	8,471	8,734	8,215
Professional, scientific, & technical services	8,554	9,495	10,652	11,274	11,488	10,414	10,884	11,205
Management of companies and enterprises	1,466	1,594	1,810	2,055	2,063	2,464	2,516	2,629
Administrative & waste management services	10,584	11,633	14,951	14,911	14,285	14,764	16,467	16,491
Educational services	4,054	4,516	4,646	4,550	4,592	4,643	4,774	4,843
Health care and social assistance	18,578	22,688	23,540	25,882	26,088	26,359	27,816	27,444
Arts, entertainment, and recreation	2,597	2,349	2,699	2,855	2,920	3,016	3,195	3,257
Accommodation and food services	14,591	16,290	17,004	17,862	17,575	17,861	18,861	20,069
Other services, except public administration	12,835	14,143	14,247	15,139	15,759	17,648	18,359	18,041
Government and government enterprises	53,172	55,215	56,017	57,686	57,646	56,786	54,165	53,491
Federal, civilian	14,227	14,605	14,616	15,650	16,366	18,350	16,998	16,173
Military	6,448	7,194	7,006	6,364	5,467	5,349	5,168	4,728
State and local	32,497	33,416	34,395	35,672	35,813	33,087	31,983	32,583
State government	12,337	12,342	12,535	12,685	12,400	10,405	9,750	10,407
Local government	20,160	21,074	21,860	22,987	23,413	22,682	22,233	22,176

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.

Source: Bureau of Economic Analysis, 2017

<i>Table 19 -- Middle Georgia County Traded Clusters</i>				
Cluster	2015 Employment	Actual Change in Employment (1998-2015)	Expected Change in Employment (1998-2015)	Over/Under Performance in Job Growth
Insurance Services	7,153	2,817	(128)	2,945
Business Services	6,414	505	3,622	(3,117)
Distribution and Electronic Commerce	6,235	2,245	916	1,329
Food Processing and Manufacturing	2,660	310	159	151
Education and Knowledge Creation	2,445	49	1,527	(1,478)
Hospitality / Tourism	2,148	(404)	418	(822)
Automotive	1,820	(465)	(699)	234
Livestock Processing	1,770	1,345	(2)	1,347
Construction Products & Services	1,608	113	17	96
Paper and Packaging	1,545	(310)	(708)	398
Transportation and Logistics	1,534	482	108	374
Financial Services	1,204	(1,225)	(977)	(248)
Vulcanized and Fired Materials	1,090	(1,380)	(1,000)	(380)
Wood Products	1,020	(784)	(551)	(233)
Power Generation & Transmission	900	770	(5)	775
Production Tech. & Heavy Machinery	840	(1,425)	(480)	(945)
Nonmetal Mining	825	(470)	(225)	(245)
Aerospace Vehicles and Defense	820	(1,780)	(657)	(1,123)
Recreational and Small Electric Goods	790	(1,225)	(977)	(248)
Textile Manufacturing	547	(2,515)	(2,176)	(339)
Marketing, Design, and Publishing	534	(448)	214	(662)
Communications Equip. & Services	490	320	(29)	349
Forestry	460	(50)	(51)	1
Plastics	409	(145)	(132)	(13)
Downstream Chemical Products	400	95	(85)	180
Information Tech & Analytic Instruments	294	264	(10)	274
Performing Arts	275	113	17	96
Upstream Chemical Products	255	105	(33)	138
Printing Services	251	(235)	(225)	(10)
Furniture	223	(1,812)	(987)	(825)
Downstream Metal Products	210	(150)	(95)	(55)

Source: US Cluster Mapping Project, Harvard Business School and US Economic Development Administration

Table 20 -- Middle Georgia Local Clusters

Cluster	2015 Employment	Actual Change in Employment (1998-2015)	Expected Change in Employment (1998-2015)	Over/Under Performance in Job Growth
Local Health Services	29,517	626	9,208	(8,582)
Local Hospitality Establishments	18,136	4,821	5,745	(924)
Local Commercial Services	9,252	(334)	1,640	(1,974)
Local Real Estate, Construction, and Development	9,072	(2,041)	991	(3,032)
Local Retailing of Clothing and General Merchandise	7,825	1,484	1,522	(38)
Local Motor Vehicle Products and Services	7,631	(347)	429	(776)
Local Food and Beverage Processing and Distribution	5,585	(1,065)	214	(1,279)
Local Community and Civic Organizations	5,558	952	1,789	(837)
Local Personal Service (Non-Medical)	3,735	250	1,276	(1,026)
Local Financial Services	3,179	(394)	535	(929)
Local Logistical Services	3,010	1,078	360	718
Local Household Goods and Services	2,824	179	45	134
Local Entertainment and Media	2,539	(280)	(512)	232
Local Education and Training	2,001	161	802	(641)
Local Utilities	1,937	(1,157)	(670)	(487)
Local Industrial Products and Services	708	(179)	(72)	(107)

Source: US Cluster Mapping Project, Harvard Business School and US Economic Development Administration

SOC	Occupation	2014 Estimated Employment	2024 Projected Employment	Total 2012-2024 Employment Change
00	Total All	201,090	214,860	13,770
11	Management	11,180	11,590	410
13	Business and Financial Operations	12,470	12,650	180
15	Computer and Mathematical	3,560	4,000	440
17	Architecture and Engineering	4,520	4,480	(40)
19	Life, Physical, and Social Science	520	500	(20)
21	Community and Social Services	2,800	3,000	200
23	Legal	690	710	20
25	Education, Training, and Library	13,240	14,510	1,270
27	Arts, Design, Entertainment, Sports, and Media	1,580	1,660	80
29	Healthcare Practitioners and Technical	11,790	13,880	2,090
31	Healthcare Support	6,320	7,740	1,420
33	Protective Service	5,190	5,370	180
35	Food Preparation and Serving Related	17,940	18,870	930
37	Building and Grounds Cleaning and Maintenance	6,460	6,700	240
39	Personal Care and Service	6,490	7,210	720
41	Sales and Related	21,250	23,410	2,160
43	Office and Administrative Support	29,720	31,700	1,980
45	Farming, Fishing, and Forestry	1,930	2,020	90
47	Construction and Extraction	8,250	8,120	(130)
49	Installation, Maintenance, and Repair	10,730	10,860	130
51	Production	13,200	13,910	710
53	Transportation and Material Moving	10,640	11,380	740

Source: Georgia Dept. of Labor, Workforce Statistics & Economic Research, Projection Unit, 2017

Table 22 -- Innovation (by Middle Georgia County)

County	National Rank (out of 3,110 Counties)	Headline Innovation Index	Human Capital & Knowledge Creation	Business Dynamics	Business Profile	Employment & Productivity	Economic Well-Being
Baldwin	2,614	72.7	93.4	51.1	66.3	78.6	69.4
Crawford	2,252	76.8	69.0	70.6	60.3	86.3	109.0
Houston	1,018	90.0	124.5	48.8	81.7	91.7	115.2
Jones	2,272	76.6	84.7	39.6	74.7	89.7	99.4
Macon-Bibb	1,850	81.4	108.5	42.9	85.0	90.3	70.5
Monroe	1,850	81.4	92.9	49.1	76.9	90.4	104.9
Peach	1,712	82.7	131.4	44.7	76.2	85.0	67.8
Pulaski	3,001	65.1	78.2	40.2	62.7	71.7	74.3
Putnam	2,364	75.8	90.7	54.8	89.4	65.5	92.2
Twiggs	2,884	68.2	60.5	39.1	76.1	87.6	67.2
Wilkinson	2,625	72.6	65.5	46.0	87.0	82.0	83.2

Source: Indiana Business Research Center, StatsAmerica, Innovation Index 2.0, 2017

Table 23 -- Innovation (by Georgia Regional Commission/Economic Development District)

Regional Commission	National Rank (of 384 EDDs)	Headline Innovation Index	Human Capital & Knowledge Creation	Business Dynamics	Business Profile	Employment & Productivity	Economic Well-Being
Northwest Georgia	264	90.9	88.8	60.8	111.1	99.1	90.7
Georgia Mountains	57	111.8	115.9	79.6	116.0	126.7	115.0
Atlanta	20	122.7	153.7	134.5	114.8	109.7	92.2
Three Rivers	155	99.8	101.2	86.8	101.7	111.2	84.5
Northeast Georgia	121	103.0	114.3	83.1	109.1	108.3	91.7
Middle Georgia	327	84.1	104.5	44.6	100.4	88.6	76.8
Central Savannah River Area	348	82.5	92.1	44.4	92.1	94.8	83.2
River Valley	282	88.8	108.9	69.9	96.9	83.7	85.7
Heart of Georgia-Altamaha	382	73.7	73.9	37.3	106.5	77.1	70.3
Southwest Georgia	383	73.5	75.1	39.2	95.2	80.7	74.2
Southern Georgia	361	79.7	76.4	61.2	92.7	85.0	81.5
Coastal	202	96.0	121.2	58.2	90.2	107.4	95.6

Source: Indiana Business Research Center, StatsAmerica, Innovation Index 2.0, 2017