

# **Metro Region Economic Development Assessment 2017**

Prepared with the assistance of the  
**North Central Wisconsin  
Regional Planning Commission**

## Metro Region Participating Communities

Village of Kronenwetter

Village of Marathon City

City of Mosinee

Town of Rib Mountain

Village of Rothschild

City of Schofield

City of Wausau

Village of Weston

With support from:

Marathon County Economic Development Corporation



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## Executive Summary

The discussion for a regional economic strategy started when metro region community leaders came together to discuss economic development issues at the invitation of the Marathon County Economic Development Corporation (MCDEVCO). Slow population growth, labor shortages, low wages, and other issues were discussed. None of the local communities or the County has a formal economic development strategy beyond the existing economic development sections from their individual comprehensive plans and other similar plans. The conclusion was that dealing with these challenges as individual communities was difficult and collaboration might be the best approach.

The Metro Region Economic Development Assessment is the first step in creating a formal regional economic development strategy for the communities of Kronenwetter, Marathon City, Mosinee, Rib Mountain, Rothschild, Schofield, Wausau and Weston. Combined, these communities are the urbanized core of Marathon County. The purpose of this assessment is to provide a background for a future regional economic strategy. This assessment combines community demographic, labor force, and local economy data to provide an illustration of the larger area trends within the metro region.

The metro region was identified as a crucial economic hub in the 2016 North Central Wisconsin Region Comprehensive Economic Development Strategy (CEDS). The consequences of the economic successes or failures of the metro region have implications beyond Marathon County. The metro region is the only metropolitan area in the North Central Wisconsin Region. It is a major job center with about 57,000 jobs, or nearly 30 percent of total jobs in the ten county region. Furthermore, the metro region is a regional shopping and services center, serving many rural communities in North Central Wisconsin.

Overall the metro region population growth has slowed since the 2000s. The population will continue to grow, but at a much slower rate. Over the next ten years the percentage of the population in Marathon County that is 65 and older will increase from 16 to 20 percent. The percentage of population that is of prime working age, 20 to 65, will decrease from 58 percent of the population to 53 percent. This will have many implications for school districts, housing, community services, and the labor force.

The interconnectedness of community labor forces, industries and their supply chains, and markets means that the economic successes or failures of one community affect the entire region. For example, only 3 percent of the Village of Kronenwetter's labor force works in Kronenwetter, while 28 percent work in the City of Wausau. Therefore a major business closure in Wausau could have a large impact on Weston, Rib Mountain or anyone else whose livelihoods

depend on that business. That business might also be a major supplier of other metro region businesses and the loss of the business might mean higher production costs for other businesses throughout the metro region. Furthermore, there have been reports of developers attempting to play metro region communities against each other, vying for larger incentive packages, which do not benefit metro region residents or businesses.

The metro region is still recovering from the economic recession. As of 2016, the region had 500 fewer jobs than 2006. While the region is expected to reach pre-recession job levels by 2018, the local economy is projected to have slower job growth compared to the State and the Nation.

Between 2010 and 2014, the number of jobs held by metro region residents decreased by 605 from 41,618 in 2010. Simultaneously, unemployment rates dropped from 2010 from 7.7 percent to 7.6 percent in 2014, as labor force participation rates also dropped. Within the metro region, the Labor Force Participation Rate was at 71.3 percent, higher than the County rate (70.2%), the State (67.4%), and the Nation (63.9%) in 2014, but a decrease from 73.1 percent in 2000. Labor Force Participation Rates are expected to continue decreasing as the population continues to age. Decreased participation rates mean that, despite slight growths in population, the aging of the population will lead to fewer people in the labor force creating labor shortages. Given the number of jobs in Marathon County projected for 2026, and the projected available work force, based on commuting patterns, Marathon County is expected to have a labor force shortage of roughly 4,000 workers.

Over the next decade, roughly 22,000 job openings are expected in the metro region. Job openings are calculated by the Bureau of Labor Statistics and are the equivalent to the minimum number of people that will need to be trained to fill a position due to new jobs, retirements, career changes and advancements, and deaths. On the County level, most of these job openings (63%) are being driven by retirements and it is presumably true at the metro region level as well.

The economic development assessment examined the local economic clusters. A cluster analysis allows economic developers to pursue strategies for groups of businesses that are already established in the region. Manufacturing is still the dominate industry in terms of jobs and contributions to the overall economy. Over the next ten years, manufacturing will continue to be the largest employer, but by 2026 the health care industry is expected to surpass manufacturing in terms of total jobs. Since the recession, the number of manufacturing jobs has decreased by over 2,000 and another 500 jobs are expected to be lost by 2026 in this industry. Many of these losses have been in the paper and wood products subindustries, which has faced falling paper sales with digitization and intense foreign competition.

However, although some manufacturing subindustries struggle, others are growing. This is particularly true for Technology Production and Machinery Technology industry cluster, which

includes companies such as Greenheck Fan Corporation, and Industrial Service & Machine. An industry cluster is a group of interconnected businesses that typically purchase supplies from one another, or benefits in some way from being in close proximity to one another, such as sharing similarly skilled labor pools. An industry cluster analysis can be used to identify unique strengths of a region and can offer guidance on economic development strategies to pursue.

Other prominent and growing industry clusters in the metro region include the Downstream Metal Products cluster, which encompasses Wausau Window and Wall Systems, and the Food Processing and Manufacturing cluster, which is comprised of establishments such as the Marathon Cheese Corporation and Kraft Foods. The Business cluster is also expected to grow and is highly concentrated in the area. This includes a number of regional management offices, engineering and consulting services, among other specialties.

In addition to the Wood Products cluster and the Paper and Packaging cluster, other crucial clusters have been declining. The insurance cluster has seen jobs decrease by 31.2 percent over the past 10 years and is expected to lose another 500 jobs during the next ten years. These clusters, Wood Products, Paper and Packaging, and Insurance, have been vital to the region because of their high job multiplier effect, which means that there are many other jobs in the region that are dependent on these cluster's success.

A supply chain gap analysis for those industry clusters shows which industries and establishments could be successfully attracted to the region because of regional demand and increase regional prosperity. For example, the Technology Production and Machinery Technology industry cluster is the premier cluster in the metro region. This cluster imported over 215 million dollars of supplies and services into the region, a proportion of which could potentially be produced in the metro region. Goods purchased from subindustries such as oil refinery or steel mills are not likely to be produced here in the near future. However, the cluster imports millions of dollars of purchases from motor and generator manufacturing, machine shops, and other related subindustries which already exist within the metro region.

Facing the issues of a low-growth population, transitioning industries, labor shortages, and low wages will be difficult. Together, the metro region municipalities are much better equipped to solve these issues by pooling resources and cooperating with each other, rather than competing against each other. There is strength in numbers, and working together the metro region can compete with the other regions in the State and Nation.





## Introduction

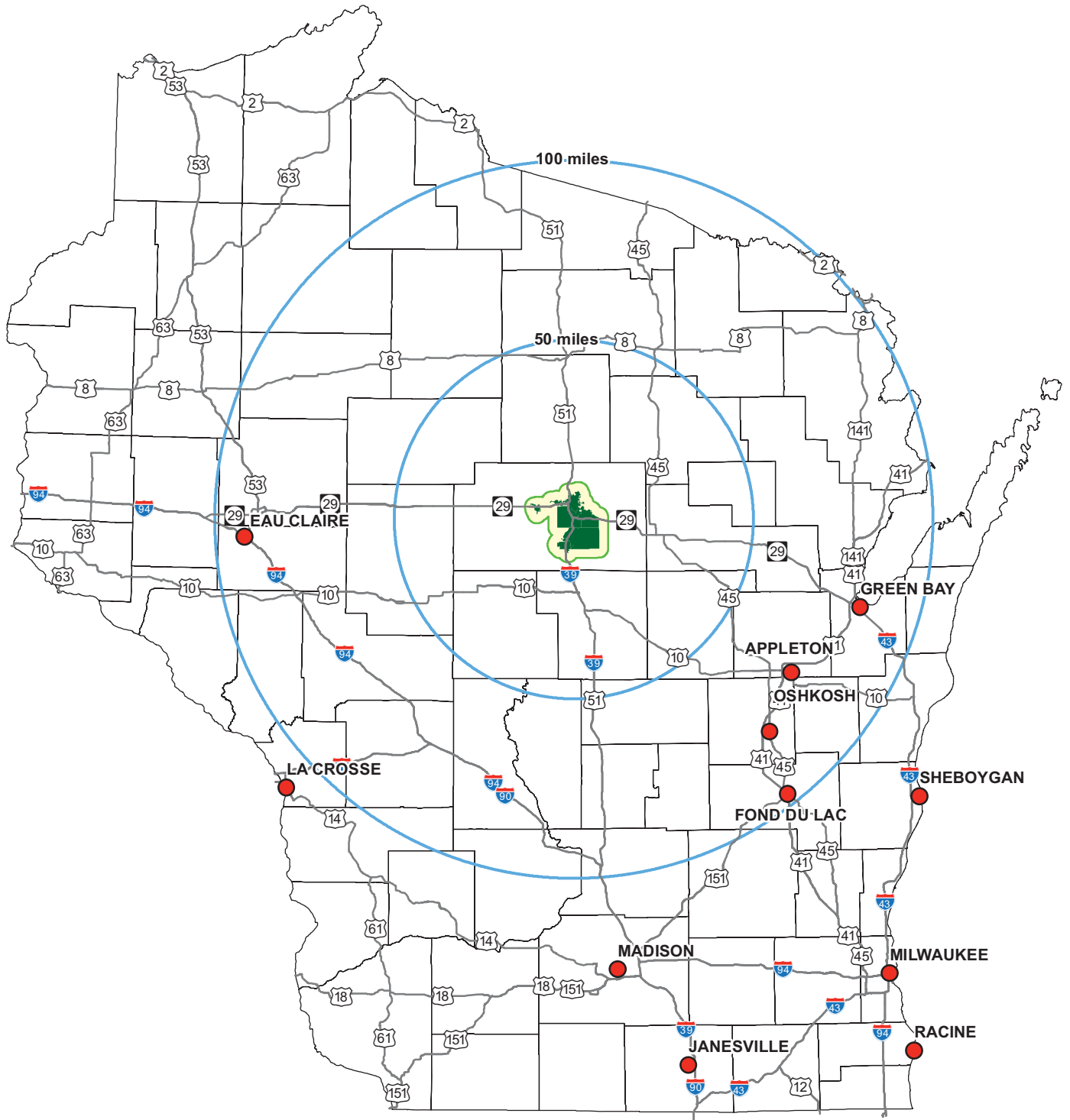
If the individual communities of the Metro Region expect to compete regionally, nationally, and globally, collaboration is critical. The City of Wausau is the region's largest community, with roughly 39,000 people. Individually, the city has difficulty competing with other medium size cities to grow its economic base. Simultaneously, the city is also competing with the abilities, resources, and amenities of other smaller communities in the region. However, combined the metro region has over 80,000 people and can compete with mid-market communities to grow and diversify the economic base.

Collaboration between communities requires a strategy that focuses on the unique strengths of the entire region, promotes partnership, directs resources, and most importantly, provides a vision. This will ultimately advance the regional economy beyond the capabilities of individual communities and raise the quality of life of the region's residents, as well as its labor shed. Together the core communities can strengthen the region's economic position in the state and nation to bolster its role as the economic hub of north central Wisconsin.

A strategy with specific action items and timelines should clarify the roles of MCDEVCO and participating communities, reduce the replication of efforts, allocate resources appropriately, and allow the region to decide how to best direct and generate economic development within its borders. Despite substantial resources dedicated to economic development, neither Marathon County nor the Wausau metro region has an economic development strategy. This leaves MCDEVCO and local communities unaware or unsure of what their responsibilities are in the regional economic development process. This can lead to the duplication of efforts or to inaction in times of economic transitions and upheavals.

While each community in Marathon County is important to the overall economy of the region, the focus of this effort is on the urban core where the highest percentage of people and jobs are located. For purposes of this study, the metro region includes the communities of Kronenwetter, Marathon City, Mosinee, Rib Mountain, Rothschild, Schofield, Wausau, and Weston. Combined, this region has a population of 80,959 in 2015 and 57,337 jobs in 2014, which is about 60 percent of the population and 83 percent of all jobs in Marathon County.

See Map 1: Planning Context.



 Study Area



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## Project Overview

The Economic Development Assessment is meant to provide a comprehensive overview and analysis of the area's economic conditions as the first step in formulating a regional economic development strategy. This effort was completed for MCDECO on behalf of the eight communities that make up the metro region. The North Central Wisconsin Regional Planning Commission staffed the effort.

The first chapter of this assessment focuses on the backgrounds of the principal communities and the metro region's economic history. The second chapter examines the area's demographics and housing trends. The third chapter concentrates on the residential labor force, including changes in the labor force participation rates, unemployment, median wages, employment by industry, and local commutes patterns.

The fourth and fifth chapters examine the economic conditions of the metro region. Chapter Four, the core of this effort, is an economic analysis of industries located within the metro region and includes location quotient, supply gap and cluster analysis. The fifth chapter is a summary of local infrastructure and transportation systems.

The sixth chapter identifies the various existing goals from each community and combines them into some themes. While, chapter seven refines these themes and incorporates the thoughts expressed during the planning process into an "initial" strategy framework and identifies some next steps. Combined these chapters are meant to serve as the foundation for a regional economic development strategy.

## Data Sources

The collection of data for this assessment started with each community's comprehensive plan. These community comprehensive plans were put together in 2005 and 2006 as a part of a county-wide effort. The exceptions to these plans were Kronenwetter, which completed its plan in 2009, and Rothschild, whose comprehensive plan was recently updated and adopted in 2016. Wausau, Weston and Marathon City are also undergoing comprehensive plan updates but were not completed at the time this assessment was compiled. Issues have been pulled from these draft plans when deemed relevant.

National, state and county level data was collected to update the comprehensive plans and economic analysis. Data sources include the U.S. Census, the American Community Survey (2014), the Bureau of Labor Statistics, the Wisconsin Department of Administration, the Department of Workforce Development, Economic Modeling Specialists International, the Applied Population Laboratory, and the UW-Extension Division for Business and Entrepreneurship.

Note that when possible, trends are analyzed for the principal communities of this assessment and then combined for the metro region. However, when data was not available for the minor civil level or the data could only be obtained in the aggregate for individual municipalities, the county level data was used as a substitute. In chapter four, metro region zip codes, rather than minor civil divisions, were utilized to analyze industries due to data set limitations.

### Next Phase

The intent of the Economic Development Assessment effort is to lay the ground work for a full Metro Region Economic Development Strategy. This initial effort relies on existing comprehensive and other related community plans, along with updated data and analysis. Some discussion of existing goals is included, but a full strategy is envisioned as part of the next step, the Economic Development Strategy. That effort will include a detailed overall strategy and local tasks to spur economic development.

## Chapter 1: Community Background and Economic History

This chapter provides a brief background on each of the eight principal communities that are part of this effort, as well as an economic history of the metro region. This study mainly focuses on the communities of Kronenwetter, Marathon City, Mosinee, Rib Mountain, Rothschild, Schofield, Wausau, and Weston.

These communities vary widely in terms of land, population, housing, and growth projections. However, these communities' fortunes have long been intertwined. Each community's development originated from lumber production and saw mills in the 1800s, which is common in Wisconsin. Yet, as Wisconsin and the rest of Marathon County transitioned from lumbering to agriculture, the metro region became a manufacturing and business service center, led by the Wausau Group, which invested throughout the metro region in the first half of the twentieth century. To this day, the majority of these communities continue to depend on industries in which the Wausau Group invested. Furthermore, later chapters explore the extent to which residents' economic livelihoods increasingly lie in another Wausau metro region community. A cluster analysis in Chapter Four explores how businesses in the region are connected by their supply chains.

Today, the metro area is facing several challenges. Several of the communities are landlocked and must look for redevelopment opportunities for growth. Furthermore, with the end of the economic recession, a number of industries are transitioning in the region, especially wood product manufacturing. Strategies are needed to minimize potential hardships that transitions will bring to the region and to maximize economic opportunities that can come from the region's diverse workforce and local businesses. Additionally, employers are facing labor shortage across the region.

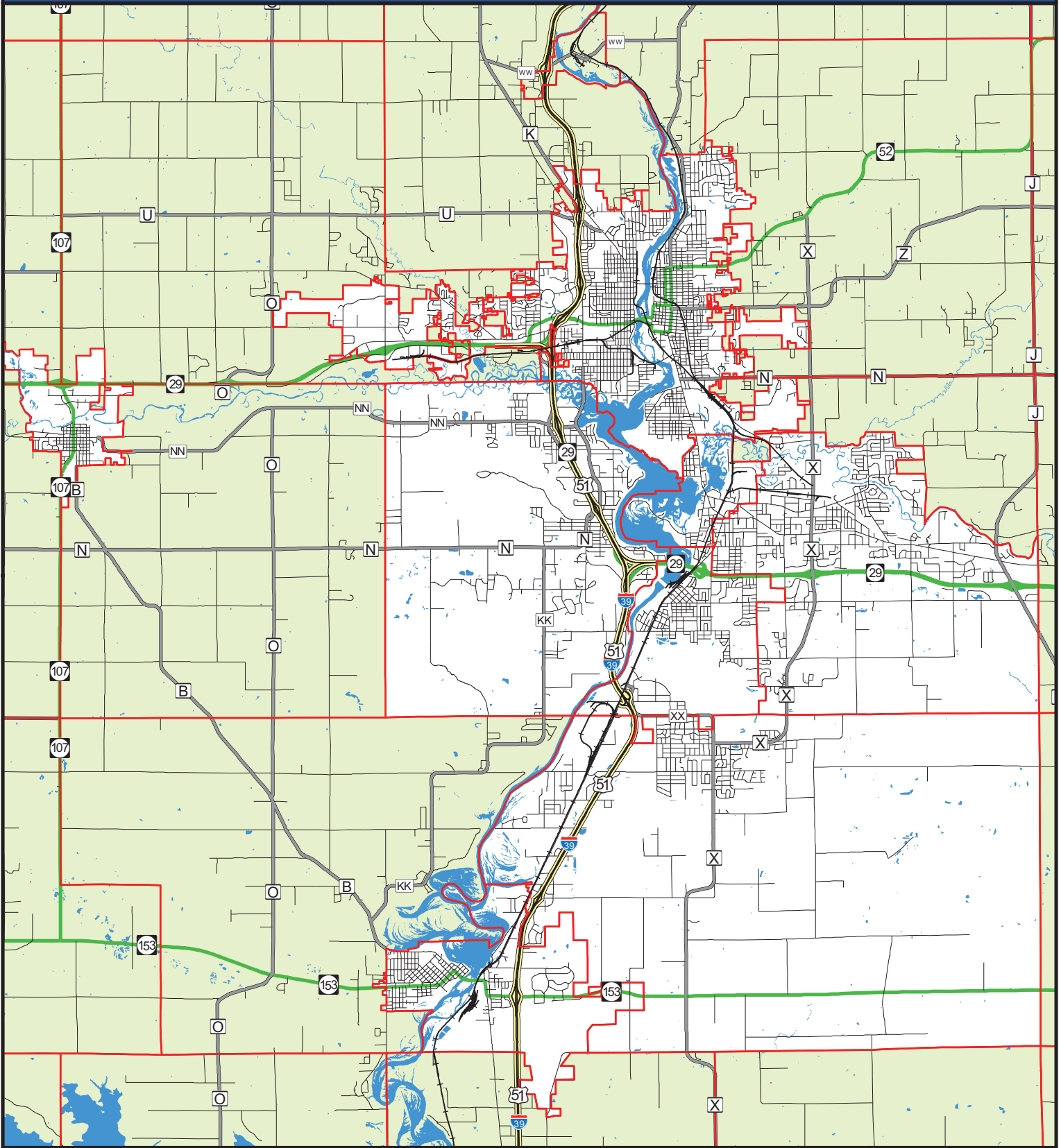
See Map 2: Metro Region Area.

### Community Overview

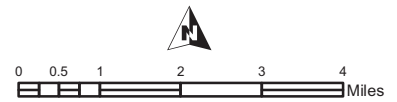
#### *Village of Kronenwetter*

The Village of Kronenwetter is located in the south-central portion of Marathon County, bordered by the Villages of Weston and Rothschild and the City of Mosinee. In 2015, the population was estimated to be 7,525. By area, the Village is the largest in the State of Wisconsin.

The community developed around the saw mill which was built in the mid-1800s at Bull Junior Creek. Over time the Town of Kronenwetter saw many changes as the surrounding areas urbanized. Portions of the Town were annexed by the City of Mosinee and the Village of Rothschild. In response to increasing development pressure, and to maintain Kronenwetter as a viable community, in October 2002 the western portion of Kronenwetter voted to incorporate as



- Minor Civil Divisions
- US Highway
- State Highways
- County Highways
- Local Roads
- Railroad
- Water



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the Village of Kronenwetter. Shortly thereafter, the remaining portions of the Town were annexed into the Village, and the Town was dissolved.

Land use in the Village of Kronenwetter is primarily classified as forest, undeveloped, and agricultural in terms of acreage. However, there are more residential parcels in the Village than parcels in all other land use classes combined. Kronenwetter is mostly a bedroom community, with only 3 percent of its resident workforce working in the community. At the same time, it had the highest household income among the eight communities, at roughly \$88,000. The population is expected to grow through 2040, according to the Wisconsin Department of Administration 2013 projections.

In the 2009 Village Comprehensive Plan, Kronenwetter identified several economic strengths and weaknesses. Some of its strengths were a well-educated population, a young labor force, low land costs, and low property taxes compared to surrounding communities. At the same time, lack of financial resources for development assistance and truck access for future business growth were identified as weaknesses.

#### *Village of Marathon City*

The Village of Marathon City is located in the west central portion of Marathon County. It lies roughly 12 miles to the west of the city of Wausau on State Highway 29 and is not actually bordered by any of the other principal communities in this study. In 2015, the population was 1,530.

The Village incorporated in 1858. In 1870, Henry Fricke built a successful gristmill and saw mill that became the industrial center for the Village and fostered its growth. This business evolved into the Menzner Sawmill and Lumberyard, still operating in Marathon City. When lumbering declined as the primary economic activity, Marathon City became a service center for surrounding farmers. Manufacturing, particularly cheese production, is the primary employer.

In the 2005 Comprehensive Plan, downtown redevelopment and diversification of the local economy were identified as the primary economic development issues in the Village. Recently, the Village has been interested in annexation for residential and economic development purposes.

#### *City of Mosinee*

The City of Mosinee is a small, older city, with a traditional downtown commercial core surrounded by residential neighborhoods. Newer development occurred on the east side of the Wisconsin River in portions of the City that were annexed from the Town of Kronenwetter in the early 1990s. The City is situated in the southern most portion of the metro region and had an estimated population of 4,021 in 2015.

Historically, the City's economy was based on the paper mill and to a lesser extent the downtown commercial area. While the paper mill remains a major part of the City's economic base, the Central Wisconsin Airport is now a primary economic generator. In addition, the



Central Wisconsin Business Parks provides a significant amount of employment in the City and manufacturing remains important to the city. Recently, the city redeveloped its downtown and at least 18 businesses had updated their facades in 2006.

Several barriers to growth were identified in the 2006 Comprehensive Plan including high bedrock, wetlands, and flood plains which makes certain lots expensive to develop. There is little raw land therefore left to be developed. Additionally, the Central Wisconsin Business Park was nearly built out in 2006. However, several areas were being identified for redevelopment, including properties along the Old Highway 51.

#### *Town of Rib Mountain*

The Town of Rib Mountain is located on the western edge of the Wausau urban area, between Wausau and the Village of Marathon City. In 2015, it had a population of 6,900 and grew rapidly during the second half of the 21<sup>st</sup> century, but population has slowed since the 2000 U.S. Census.

The Town's economy is dominated by commercial and service type business, most of which are located in the eastern part of the Town, near Rib Mountain Drive. However, portions of the Western half of the Town remain fairly rural, with Rib Mountain, one of the highest elevations in the state, dominating the landscape. Manufacturing plays a much less prominent role in the Town's economy compared to surrounding communities.

One issue identified in the 2005 Comprehensive Plan was the challenge of locating redevelopment funding. Given the limited supply of vacant land for new commercial or industrial development, community leaders anticipated redevelopment to be more prevalent in the future.

#### *Village of Rothschild*

The Village is located south of the City of Schofield, to the west of the Village of Weston, and north of the Village of Kronenwetter. It is situated east of the Wisconsin River and is bisected by Cedar Creek. As such, wetlands and floodplains pose a challenge for development and the Village is "landlocked" by surrounding incorporated communities, with the exception of Rib Mountain to the west. Furthermore, the Village has identified several vacant properties that are in need of revitalization.

The Village of Rothschild was originally a part of the Town of Weston until it incorporated as a village in 1917. The Village started as a direct result of the Marathon Paper Mills, started in 1909. This location was chosen because it offered a good site for a dam and hydroelectric plant, adjacent to the paper mill. In 2015, the Village of Rothschild had a population of 5,302.

Given recent changes to the state's shared revenue program and the decrease in tax revenues from the recent recession, the Village identified difficulty in prioritizing funding economic development needs as an issue in the 2015 Comprehensive Plan.



### *City of Schofield*

The City of Schofield is located in the middle of the metro region, at the confluence of the Eau Claire and Wisconsin Rivers. In 2015, the City had a population of 2,212 and the City is fully developed, with little vacant land remaining, as well as landlocked by surrounding municipalities.

The community started in 1851 when Dr. William Scholfield arrived and laid out a village nearby the existing dam and sawmill on the Eau Claire River. With the Wisconsin Valley Railroad running through the Village on its way to Wausau in 1874, Schofield became a prime location for industrial activity. Schofield became a city in 1951 and the City's economy continues to rely primarily on manufacturing. However, little vacant land remained in the City's 800 plus acre industrial park in 2006. Therefore, most new industrial development will occur through redevelopment or expansion of existing industrial properties.

The City identified access management on Grand Avenue/Business 51 and appearance as economic development issues in the 2006 Comprehensive Plan. Access in and out of the industrial park was difficult due to a high amount of truck traffic on Ross Avenue and conflicts with residential traffic in the area. At the same time, Grand Avenue continues to be in need of access management and streetscape appearance improvements.

### *City of Wausau*

The City was chartered by the State of Wisconsin in 1872. It lies in the north-east corner of Marathon County and is located on the Wisconsin River which divides the community east and west. The City grew rapidly during the lumbering era of the late 1800s and the early 1900s. Population growth trailed off during the 1950s and the following decade. By 1980, the population had started to decrease. However, during this decade the City annexed large parts of Rib Mountain and Stettin which contained thousands of residents. While Wausau remains the most populous community in this assessment, the City's population has grown little since the 1980s.

The City had several opportunities for development including the redevelopment of existing obsolete properties as well as new "green field" development on the City's edge or in areas that may be annexed in the future. The City recently began renovating the riverfront, which is a long-term endeavor given the size of property contamination, the need to relocate existing business and the consolidation of adequately sized parcels.

### *Village of Weston*

The Village of Weston occupies much of the southeast portion of the metro region. The Village incorporated in 1996 from the south western portion of the Town of Weston. The Village is the second largest in the metro region in terms of population and in 2015 it had a population of 15,276. The Village enjoys a fairly diverse economic base. The local economy includes a significant amount of retail, commercial, institutional and industrial development. Overall the Village is expected to continue growing steadily through 2040.

The Village has recently announced the planning for the Southeast Quadrant, a 300-acre tract of land located in the southeast quadrant of the State Highway 29 – Camp Phillips Road (County Road X) interchange. This multi-use area is envisioned to emerge as a significant component of the community's economic base.

## Economic History

The production of lumber dominated the economy in Wausau during the 19<sup>th</sup> century with the lumber mills at the Stevens Mill in Big Bull Falls (Mosinee) and the Martin Mill on the Eau Claire River (Schofield). The lumber businesses provided the foundation for the lumber barons' attempts to construct railroads and create other business.

The Wisconsin Valley Railroad arrived in the City of Wausau in 1874, which had been incorporated only two years prior. The Milwaukee, Lake Shore & Western (later the Chicago and Northwestern Railroad) went through Wausau on the way to Marshfield by 1880. The arrival of railroads and growth of the lumber business led to population growth and made the area a prime location for other industrial pursuits.

Across Wisconsin communities had prospered from their lumber mills. Yet as the forests were cleared, many communities transitioned to agriculture and Marathon County thrived from its agricultural pursuits. However, Wausau remained a lumber operations center mainly due to the contributions of the Wausau Group.

The Wausau Group was a collection of leaders in the lumber industry which began informally meeting in 1901. The group created a new role for Wausau, transitioning it from a lumber milling center into a managerial center for various lumber-related businesses. Men in the Wausau Group were responsible for shifting from lumber production into the creation of paper mills and built the Wausau Paper Mills Company in 1899 at Brokaw. This meant that resources that once left the area as unprocessed goods were shipped as finished products, providing employment opportunities and adding value in forest products. The group supported the founding of the Wausau Sulphate Fibre Company, a wood pulp and paper operation, located at Mosinee. A third mill was built in 1909 at Rothschild, known as the Marathon Paper Mills Company, with the construction of a 450-foot dam across the river that would create Lake Wausau, a flowage on the Wisconsin River. As these industries grew, so did industries such as supporting manufacturers, transportation, communications, public utilities, government trade, finance, insurance and real estate.

Concern about safety hazards in the paper mills led to the Wausau Group's entry into the insurance business, with the creation of what is known today as the Wausau Insurance Company. This business continues to be a major business in the metro region. With leadership and interlocking directorates in the local banking industry and the street railway company, as well as leadership of local civic and social groups and arts and culture, the Wausau Group was

responsible for carrying the City of Wausau and Marathon County into the mid-twentieth century.

In the second half of the twentieth century, Wausau continued to build on the diversified economic foundation created by the Wausau Group. The local control provided by the Wausau Group was clearly important in maintaining the economy of the area, although some have noted that this control prevented the influx of “new blood” or “innovative ideas”. Nonetheless, there are lessons in economic development to note in this history. While today’s economic strategy will need input of multiple communities and perspectives, our region’s economic success was built on a regional vision that emphasized diversified industries and was not bound to any political boundaries.

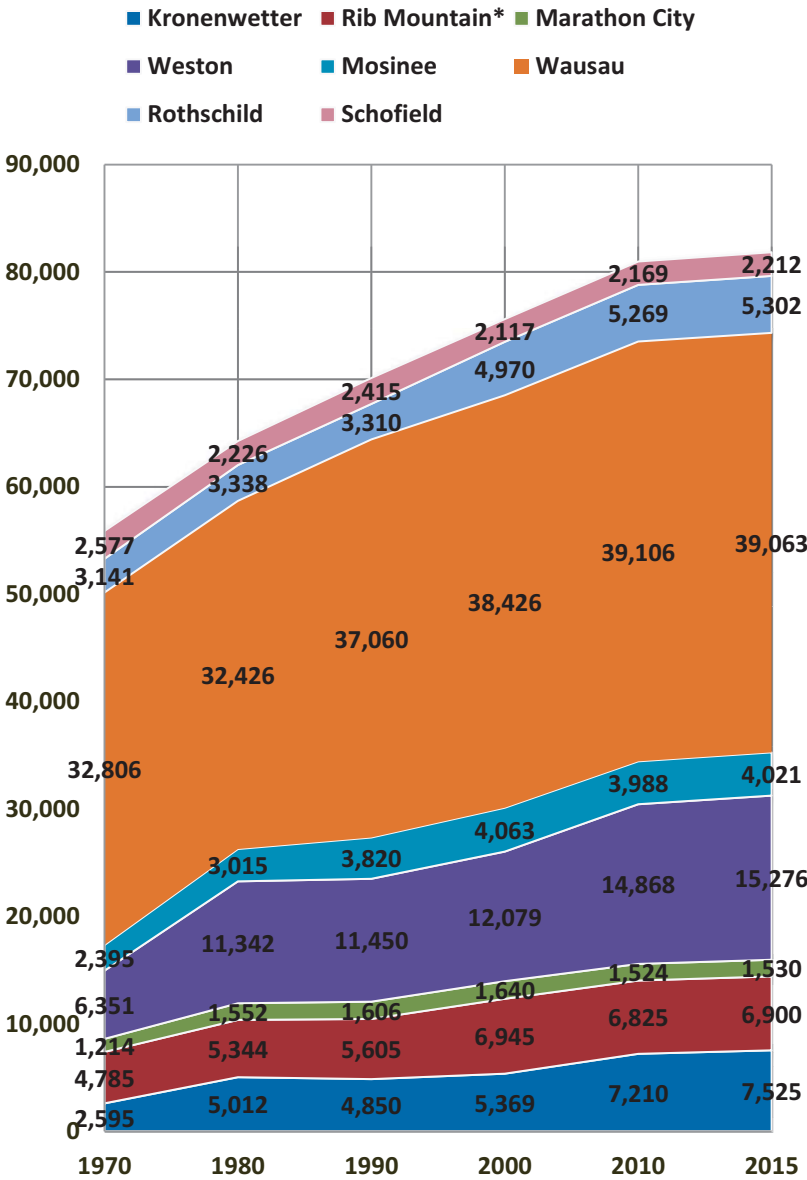
By 2000, the economic foundation retained the same base, but with some diversification. Wood and paper products were still leading industries, but manufacturing industry had evolved as well to include many other subindustries. Major employers were manufacturing, health care, and the insurance industry. The metro region fared well compared to many other metropolitan statistical areas in terms of job loss in the 2001 recession, which many have contributed to the diversification of the region’s industries.

More recently, there have been shifts in the metro region economy and there were many jobs losses in the 2008 recession. As more and more institutions and businesses choose to go “paperless” and there is more competition from foreign paper mills, the metro region is seeing job losses in the paper mill industry. Manufacturing remains the highest employer in the area, but the industry is shifting and net losses are expected and many workers will need to be retrained. Insurance and management services continue to be major players in the area’s economy. At the same time, there have been large gains in employment made by the health care sector.

## Chapter 2: Demographics and Housing

This chapter is a review of the socio-economic trends necessary to understand the strengths, weaknesses, issues, and opportunities in the metro region. It focuses on the metro region's demographics and housing trends, which include population trends, net migration, population projections, age, household composition, incomes, poverty, housing units, the condition of housing stock, and affordability.

**Metro Area Population Growth, 1970-2015**



Generally the data in this chapter and the next chapter on the residential labor force are from the 2000 and 2010 U.S. Census and the 2014 American Community Survey (ACS), which was the latest data available from the U.S. Census when this information was collected. Data from 2015 and 2016 are utilized when available from other sources. When possible, trends are analyzed for the principal communities of this assessment and then combined for the metro region. However when data was not available for the minor civil level or data could only be obtained in the aggregate for individual municipalities, the county level data was used as a substitute.

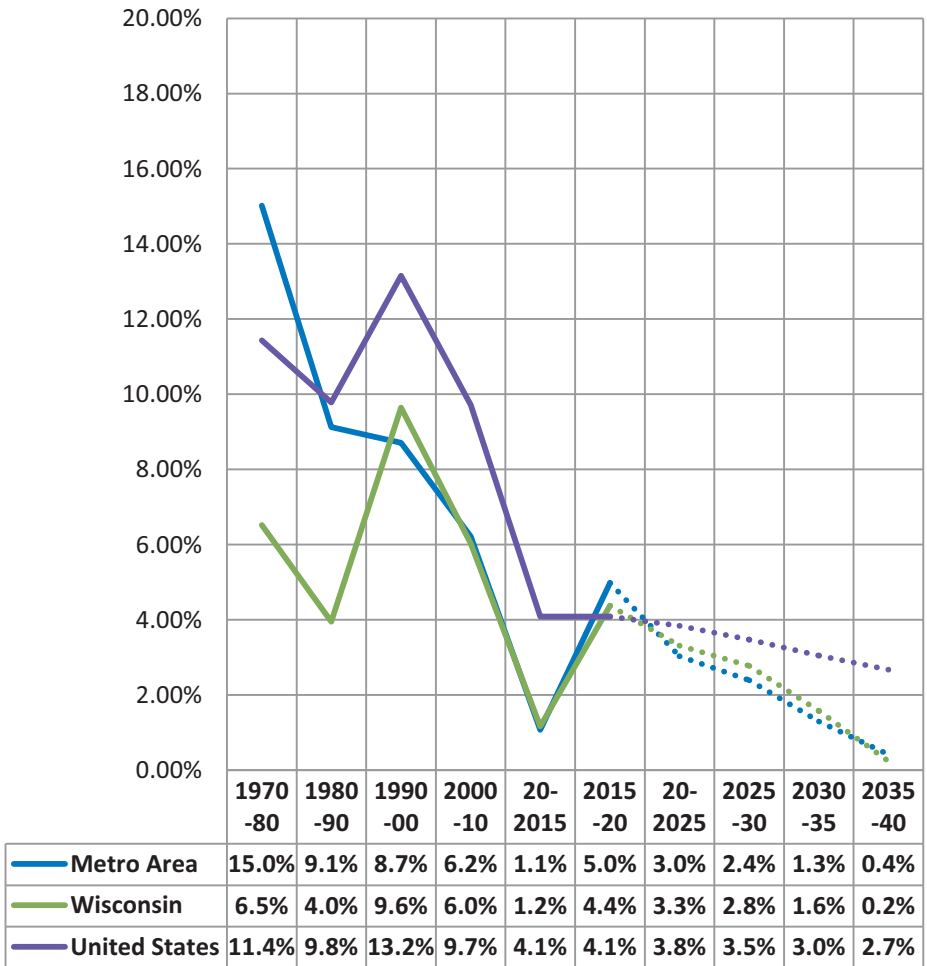
### Demographics

#### *Population Trends and Projections*

While the population grew rapidly in the 1970s, the population growth has since slowed in the metro region to levels below both the state and the nation. In the 1970s, the metro region became a job center and had a growth rate of 15.0

percent, compared to the state’s 6.5 percent and the nation’s 11.4 percent. The population increased from 55,864 to 64,255 persons. As Figure 2.1 illustrates, many of the workers moving to the area did not settle in Wausau, but choose to live in outlying areas such Weston, Rib Mountain, and Kronenwetter.

**FIGURE 2.2  
Population Percentage Change,  
1970-2040**



Source: U.S. Census and WDOA 2013

metro region’s growth (7.1%) was slightly above the state’s increase (6.0 percent). Compared to the state, the nation grew 3.7 percentage points more. Since 2010, the population growth has stagnated in both the metro region and in the state as a whole. According to the Wisconsin Department of Administration (WDOA) population estimates, the metro region increased 1.1 percent and the state 1.2 percent from 2010 to 2015. The nation grew at 4.1 percent. For the state, the depressed growth originates from an aging population and lower net migration. These factors are also true for the metro region, as displayed in Figure 2.2.

In the 1980s, Wisconsin’s population growth slowed as Wisconsinites left the state in search of job opportunities. However the metro region population increased 9.1 percent while state only grew at 4.0 percent and the nation increased 9.8. Much of the growth here was seen in the City of Wausau was due to an influx of refugees resettled in the area as well as annexations.

During the 1990s the population increased steadily, growing 8.7 percent in the metro region. This population growth was lower than the state (9.6%) and the nation’s (13.2%) population growth.

In 2015, the WDOA estimated the population of the metro region to be 81,829. In the first decade of the new millennium, the

**Wisconsin MSAs**

The metro region, along with the rest of Marathon County comprises the Wausau Metropolitan Statistical Region. A metropolitan statistical region, or MSA, is a geographic entity delineated by the Office of Management and Budget. A metro area contains a core urban area of 50,000 or more population and consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core. There are 12 MSAs in the state of Wisconsin, along with three others that share areas in Minnesota and Illinois. As displayed below, the Wausau MSA is the third smallest in terms of population. In terms of population growth, the Wausau MSA had the fifth largest percent increase from 2000 to 2011, with 6.7 percent. The largest percent increase during this time was the Madison MSA with 14.4 percent while Sheboygan had the smallest increase, 2.1 percent.

**Metro Statistical Areas by Size**

- Milwaukee/Waukesha, West Allis MSA:** 1,562,000
- Madison MSA:** 576,467
- Green Bay MSA:** 309,469
- Fox River Valley:** 227,403
- Racine:** 195,388
- Oshkosh-Neenah:** 167,669
- Eau Claire MSA:** 162,657
- Janesville MSA:** 160,092
- La Crosse MSA:** 134,488
- Wausau MSA:** 134,400
- Sheboygan MSA:** 115,149
- Fond du Lac MSA:** 102,079

*Net Migration*

The components of population change are twofold: 1) the natural population change of births and deaths and 2) net migration. The population change in Marathon County mirrors Wisconsin. According to the Wisconsin Department of Workforce Development, from 2010 to 2015, the county had a 2.0 percent increase due to natural population change. Net migration is the difference between the population moving into the region and the population moving out of the region. During the same period of time, Marathon County saw a net decrease in migration equaling -1.1 percent, while the state saw a -.8 percent decrease.

*Population Projections*

Over the next thirty years, from 2010 to 2040, 55.2 percent of the growth in Marathon County will be in the metro region. The County will grow 14.0 percent, from 134,063 to 152,790. The metro region will grow 13.9 percent, increasing by 10,346 persons. The state will have a similar growth rate of 14.1 percent during the same time period. The United States will greatly outpace the growth in Wisconsin, at 23.1 percent. Slower population growth rates in Wisconsin, as well as the metro region, will have negative consequences for job creation in the state, as discussed in the trends section this chapter. Population growth rates are displayed in Figure 2.2.

*Age*

Overall the population of Wisconsin is aging. Populations age due to retirees migrating into amenity rich areas to enjoy their retirement, young adults migrating out of a region to pursue educational and career opportunities or other life experiences, or both. According to the Office of Economic Advisors, the Baby Boomer generation is fueling the aging of Wisconsin. Wisconsin experienced a 10 percent increase in its senior population between 2000 and 2010. At the same time, Wisconsin traditionally has been an exporter of young adults in their twenties.

In 1990, Wisconsin’s median age was a tenth of a year higher than the national median while the County’s median age was lower by a tenth of a year, as displayed in Table 2.1. The Village of Weston’s median age was a whole 2 years lower than the nation, while Wausau’s was 1.3 years higher.

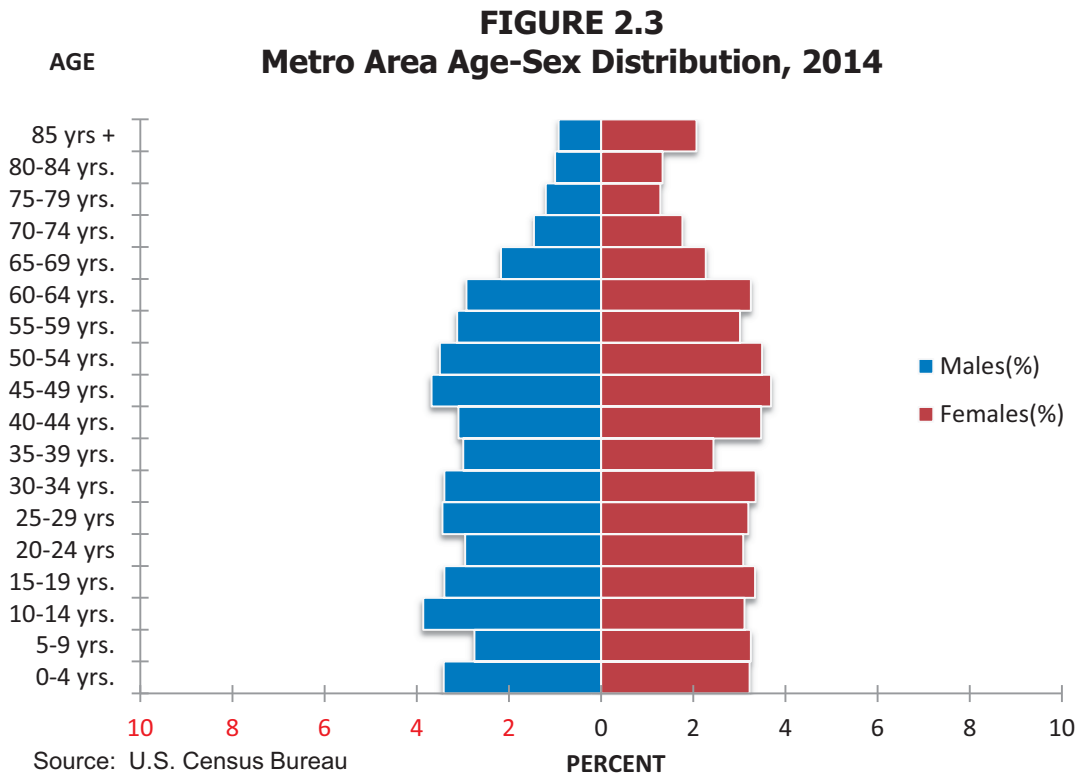
In 2010, Marathon’s County’s median age was 2.2 years higher than the national average. However, within the metro region, Wausau and Weston had median ages below the national median. The growth in Wausau’s median age was significantly lower than the increase in the state and the nation, only increasing .3 of a year during the past ten years.

Figure 2.3 displays an age pyramid for the metro region. In 2014, 23.8 percent of the population was under the age of 18 in the metro region, compared to 23.0 percent for the state and 23.5 percent for the country. Roughly 60.7 percent of the population in the Wausau metro was working age adults, ages 18 to 64, compared to the state with 61.0 percent and the county at 62.8 percent. 15.5 percent of the population in the metro region was 65 years of age or older. This was slightly higher than the county (15.1%). The metro region had 1.1 percentage points more than the state and 1.8 percentage points more than the nation.

Table 2.1: Median Age

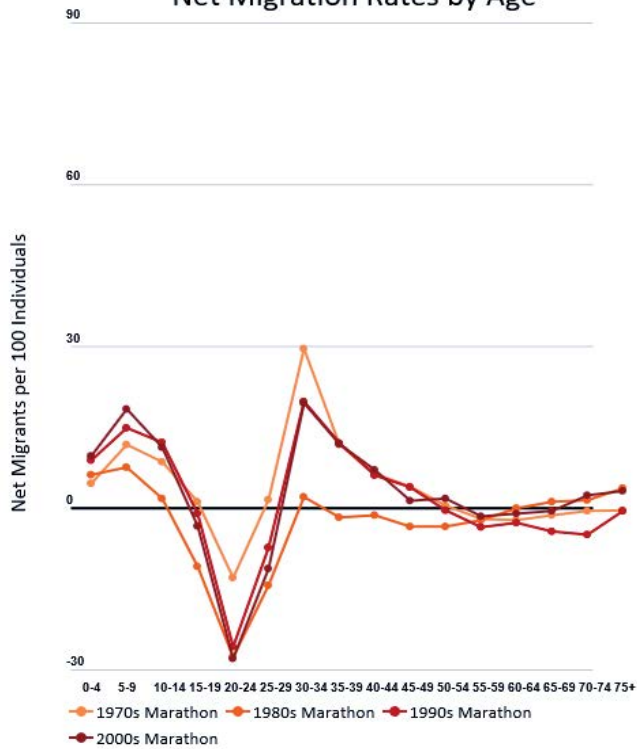
Minor/Major Civil Division	1990	2000	2010	1990-2010 % Change
Kronenwetter	30.6	35.7	37.3	21.9%
Marathon City	31	35.8	43.2	39.4%
Mosinee	33.1	35.1	39.1	18.1%
Rib Mountain	33.5	38.0	45.0	34.3%
Rothschild	33.3	38.4	41.8	25.5%
Schofield	34.5	37.1	39.1	13.3%
Wausau	34.1	36.5	36.8	7.9%
Weston	30.8	32.2	35.6	15.6%
Marathon County	32.7	36.3	39.4	20.5%
Wisconsin	32.9	36.0	38.5	17.0%
United States	32.8	35.3	37.2	13.4%

Source: U.S. Census





**FIGURE 2.4**  
**Net Migration Rates by Age**



*Winkler, Richelle, Ken Johnson, Cheng Cheng, Jim Beaudoin, Paul Voss, and Katherine Curtis. Age-Specific Net Migration Estimates for US Counties, 1950-2010. Applied Population Laboratory, University of Wisconsin- Madison, 2013. Web.*

chart indicates that individuals move back into the area in their early and late 30s. In the 2000s, there were 31.4 positive net migrants between the ages of 30 and 39. Furthermore, there were 8.5 adults between the ages of 40-49 in positive net migration per 100 individuals. The chart also indicates that these individuals are bringing their children with them.

*Household Composition*

Generally household sizes have been decreasing across the nation, increasing the number of households despite slowing population growth. This is due to an aging population, more single person households, young adults delaying parenthood, families having fewer children and even divorce rates.

In 2014, there were 33,217 households in the metro region, which was 62 percent of the households in the county. This was a .5 percent increase from 2010. 20,852 households, or 61.8 percent, were family households. 29.6 percent

The migration of millennials from rural regions has been a common concern for communities in recent years. In the metro region, 12.7 percent of the population was between the ages of 20 and 29 in 2014. This is slightly less than the Wisconsin average of 13.2 and 1.2 percentage points less than the nation. However, this not a new trend, despite the recent attention focused on the issue.

Figure 2.4 shows the net migration by age for the past four decades for Marathon County. Young adults have left the area in greater numbers than any other age group for decades. In fact, more adults between the ages of 20 and 29 left the area in the 1950s (55.7 per 100 individuals) than any decade since. In the 2000s, there were negative 39.1 net migrants between the ages of 20 and 29 per 100 individuals in the county. However, the

**Wisconsin MSAs-  
Per Capita Personal Income**

The Wausau MSA had the sixth highest per capita personal income out of the twelve Wisconsin MSAs with \$42,941. The MSA with the highest per capita personal income was Madison with \$49,969. The MSA with the lowest per capita personal income was the Janesville-Beloit MSA at \$38,713.



of households had related children under the age of 18. The 10,342 households, or 31.1 percent, or households were single person households. 3,775 households had someone 65 years or older in the household.

Table 2.2 displays the average number of persons per household. Marathon County has slightly more persons per household than the state and the country. Within the metro region, the number of persons ranges from 2.2 in the City of Schofield to 2.7 in the Village of Kronenwetter.

*Household Income*

The median household income in Marathon County was \$53,779 in 2014. This exceeded both the state and the nation medians. There was a large disparity in median incomes between house-owners, \$64,822, and renters, \$28,135. Table 2.3 displays household incomes for each of the principal communities. The median incomes in these communities range from \$70,750 in Rib Mountain to \$40,464 in Wausau.

**Table 2.3: Median Household Income by Tenure, 2014**

<i>Major/Minor Civil Divisions</i>	<i>Overall</i>	<i>Owner</i>	<i>Renter</i>
Kronenwetter	\$ 78,004	\$ 88,684	\$ 52,594
Marathon City	\$ 58,281	\$ 70,147	\$ 20,568
Mosinee	\$ 55,568	\$ 66,302	\$ 24,406
Rib Mountain	\$ 70,750	\$ 74,509	\$ 52,380
Rothschild	\$ 54,042	\$ 70,332	\$ 41,346
Schofield	\$ 45,236	\$ 54,432	\$ 37,176
Wausau	\$ 40,464	\$ 55,154	\$ 23,414
Weston	\$ 50,657	\$ 67,113	\$ 27,907
Marathon County	\$ 53,779	\$ 64,822	\$ 28,135
Wisconsin	\$ 52,738	\$ 67,186	\$ 30,207
United States	\$ 53,482	\$ 68,142	\$ 33,219

Source: 2014 ACS Five Year Estimates

From 2000 to 2014, the real median household income fell across the nation. In Marathon County, the median household income was \$45,165 in 2000 and \$58,051 in 2010. When adjusted for inflation, the median household income fell \$4,272 from \$62,091 in 2000 to \$53,779 in 2014.

*Per Capita Income*

The per capita income in Marathon County was \$28,555 which was again higher than state and nation. In 2000, the per capita income was \$20,703 which had the same buying power as \$28,462 in 2014. The 2014 county per capita income was a .3 percent increase from 2000. Table 2.4 shows the per capita incomes for each principal community.

**Table 2.4: Per Capita Income, 2014**

<i>Major/Minor Civil Divisions</i>	<i>Income</i>
Kronenwetter	\$ 30,803
Marathon City	\$ 28,140
Mosinee	\$ 28,135
Rib Mountain	\$ 40,449
Rothschild	\$ 28,174
Schofield	\$ 28,334
Wausau	\$ 24,459
Weston	\$ 26,021
Marathon County	\$ 28,555
Wisconsin	\$ 27,907
United States	\$ 27,723

Source: 2014 ACS Five Year Estimates

*Poverty*

In 2014, Marathon County, 11.4 percent of all persons was below the poverty levels. This is lower than the state (13.3%) and the nation (15.6%). Within in the metro region, most municipalities had poverty levels well below the county, ranging from 3.5 percent in Rib Mountain to 7.4 in Rothschild. The two

exceptions to this were Wausau which had a poverty rate of 20.2 percent and Weston which had 14.9 percent.

Within Marathon County, 7.9 percent of families were in poverty. Among all children under 18 years of age, 18.2 percent were in poverty. For working age adults, ages 18 to 64, 9.8 percent were in poverty while only 7.4 percent of adults 65 or older were in poverty. 7.3 percent worked full-time, year-round while 42.7 percent worked part-time, year-round.

## Housing

### Housing Units

The metro region experienced a 14.0 percent growth rate in housing units from 2000 to 2010. Weston saw the greatest increase, growing 32.4 percent. However since the 2008 economic downturn, there has been a significant drop in housing growth in the county and the metro region. In 2014, there were 36,343 housing units in the metro region, an increase of just .1 percent since 2010. Table 2.5 displays the number of housing units in each municipality in the years of 2000, 2010, and 2014.

**Table 2.5: Housing Units Change**

<i>Minor/Major Civil Division</i>	<i>2000</i>	<i>2010</i>	<i>2014</i>	<i>2000-2010 % Change</i>	<i>2010-2014 % Change</i>
Kronenwetter	1,953	2,810	2,883	30.5%	2.6%
Marathon City	659	680	689	3.2%	1.3%
Mosinee	1,711	1,791	1,774	4.7%	-0.9%
Rib Mountain*	2,769	2,761	2,664	-0.3%	-3.5%
Rothschild	1,988	2,332	2,476	17.3%	6.2%
Schofield	1,022	1,099	1,124	7.5%	2.3%
Wausau	16,668	18,154	18,345	8.9%	1.1%
Weston	4,806	6,364	6,388	32.4%	0.4%
<b>Metro Region</b>	<b>31,576</b>	<b>35,991</b>	<b>36,343</b>	<b>14.0</b>	<b>1.0%</b>
Marathon County	50,360	57,734	58,040	14.6%	0.5%
Wisconsin	2,321,144	2,624,358	2,635,602	13.1%	0.4%
United States	115,904,641	131,704,730	132,741,033	13.6%	0.8%

Source: Census & 2014 ACS Five Year Estimates

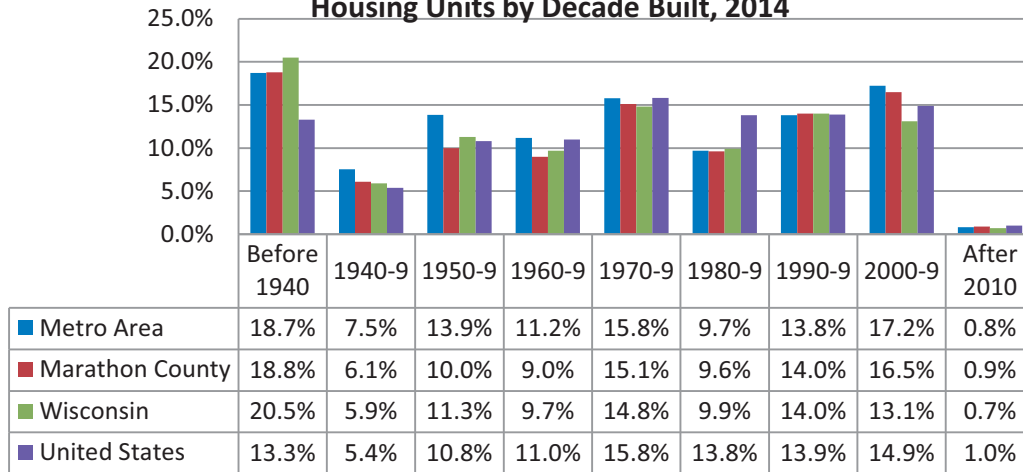
\* Note that in 2000 an error was detected in the data, where 2000 was reported higher than actual

### Housing Stock

The housing stock in Wisconsin is older than the nation as a whole. While 13.3 percent of the country’s housing was built before 1940, 20.5 percent of Wisconsin’s housing was built during this time. Comparatively, housing units in the metro region are slightly newer than Wisconsin. Only 18.7 percent of units in the metro region were built before 1940, and the area saw more of

**FIGURE 2.5**

**Housing Units by Decade Built, 2014**



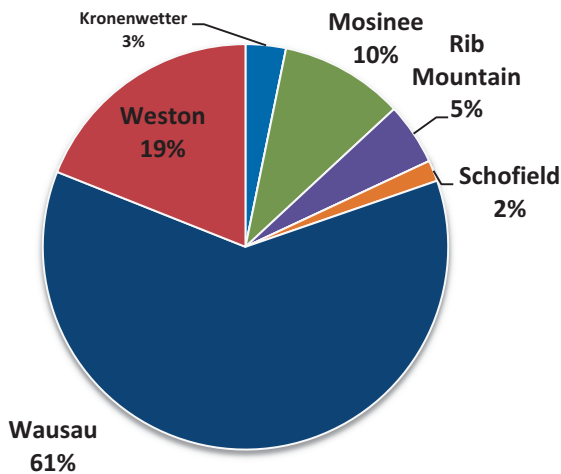
its housing stock (17.2%) in the first decade of the millennium than the state (14.9%), as shown in Figure 2.5. Figure 2.6 shows where housing units have been built since 2010.

The age of housing can indicate the need for repairs, among other things. As the housing stock ages, structural rehabilitation may be needed, such as basic landscape improvements, roofing and insulation, siding, and adaptations to make a residence handicapped accessible. Older homes are more likely to be energy inefficient as well, costing more to heat and cool.

*Housing Types*

A majority of housing units, 67.5 percent, in the United States were single-family 2014. This is true for Wisconsin, which has 71.0 percent single-family housing and for the County which has 77.1 percent. Within the metro region, 68.7 percent were single-family housing as illustrated in

**FIGURE 2.6**  
**Housing Units Built Since 2010**



**FIGURE 2.7**  
**Housing Units by Type, Metro Region 2014**

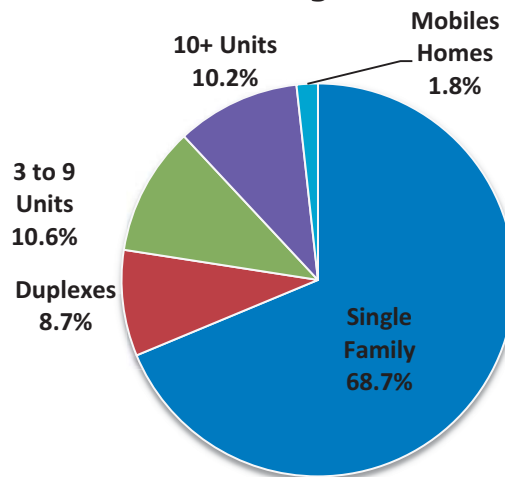


Figure 2.7. However, when these percentages are examined, Rib Mountain has 94.3 percent single family houses, followed by Marathon City (81.0%) and Mosinee (80.8%). Schofield, Wausau, and Weston all have single-family rates below the national rates.

There are 10,374 multi-family units in the metro region, comprising 28.5 percent of the housing stock. Wausau has the most multi-family units with 35.1 percent while Rib Mountain has the least with 5.2 percent. Marathon City has the highest percentage of mobile homes, at 5.8 percent. Rothschild has the least with 0.0 percent.

**Table 2.6: Vacancy Rates**

<i>Minor Civil Division</i>	<i>2000</i>	<i>2010</i>	<i>2014</i>
Kronenwetter	2.1%	5.6%	8.9%
Marathon City	4.1%	6.2%	7.8%
Mosinee	4.4%	7.3%	7.8%
Rib Mountain	2.6%	4.0%	5.0%
Rothschild	3.3%	5.7%	6.2%
Schofield	5.6%	9.6%	8.7%
Wausau	6.0%	9.2%	9.7%
Weston	4.9%	9.3%	8.0%

*Source: U.S. Census, 2014 ACS Five Year Estimates*

*Vacancy Rates*

Vacancy rates have been increasing across the country. This may be due to foreclosures and the rise in second homeownership. Vacancy rates in Wisconsin are slightly higher, at 13.0 percent in 2014, than the national average (12.5%). Vacancy rates due to seasonal use tend to be particularly high in rural areas that are considered vacation destinations and lower in urban and agricultural communities.

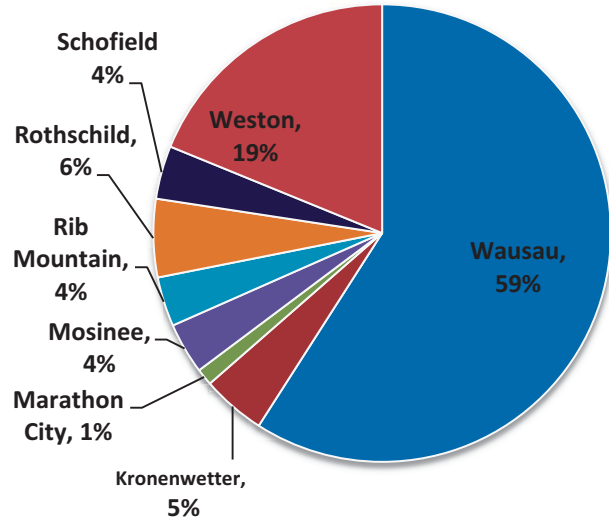
Vacancy rates in the metro region are lower than the Wisconsin average, as displayed in Table 2.6. In 2014, Wausau had the highest vacancy rate at 9.7 percent while Rib Mountain had 5.0 percent vacancy. Of the vacancy housing units, only a small percentage was for seasonal use. The majority of the vacant units in the metro region were for sale, rent, or “other”.

Homeowner vacancy rates and rental vacancies were low in 2014. To ensure that renters and homeowners are not mismatched in affordability and preferences, the Housing and Urban Development Department suggests that a 5 percent vacancy rate in either market is ideal. The metro region ranged in homeowner vacancy rates from 0.0 percent in Schofield to 4.0 percent in Rib Mountain. For rents, the vacancy rates ranged from 0.0 percent in Marathon City, Mosinee, and Rib Mountain to 6.6 percent in Weston. This is a result of the 2008 recession which slowed new construction, created a larger pool of renters due to foreclosures and lower wages, and put many homeowners who would like to sell underwater.

*Tenure*

In Wisconsin, 67.7 percent of occupied housing units were homeowner-occupied while 32.3 percent were renter-occupied in 2014. In the metro region, 66.1 percent of occupied housing units were homeowner-occupied while 33.9 percent of units were rented. Rib Mountain had the highest percentage of housing units occupied by homeowners at 84.1 percent, while Schofield had the highest percentage of renters at 42.2 percent, followed closely by Wausau at 41.1 percent. Figure 2.8 shows where rental units are located by percentage in the principal communities.

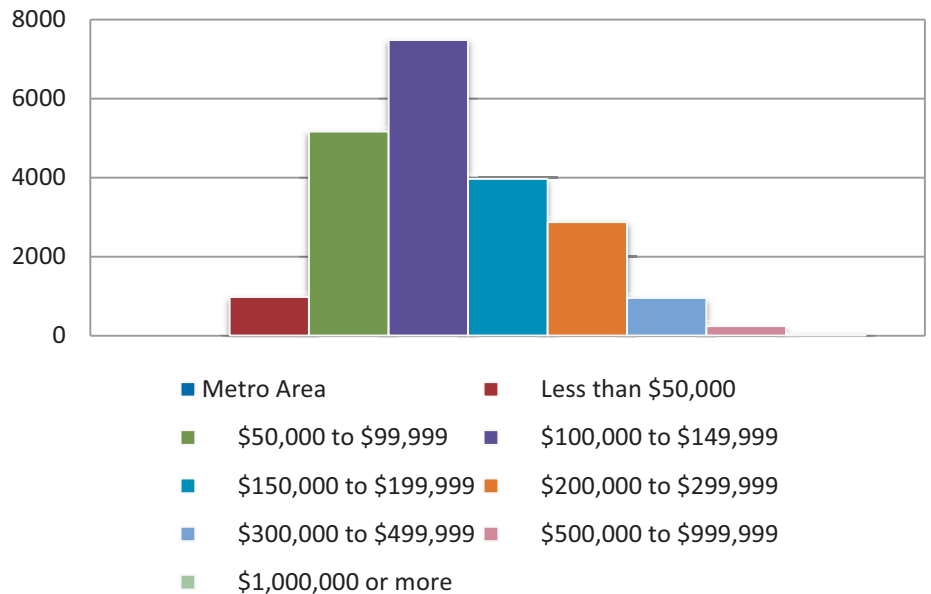
**FIGURE 2.8  
Rental Units by Location**



*Housing Values*

The median home value in Marathon County was \$142,000, which was considerably less than the state median of \$165,900 and the county median of \$175,700. Within the metro region, median values ranged from \$102,700 in Schofield to \$176,100 in Rib Mountain. Figure 2.9 displays the distribution of housing values in the metro region, which appear to skew to the right and resemble the county trend.

**FIGURE 2.9  
Housing Values in Metro Area, 2014**



*Affordability*

There were 13,738 households with a mortgage in the metro region in 2014. Within the county, the median monthly housing costs for a homeowner with a mortgage were \$1,287 per month. Within the metro region, monthly housing costs ranged from \$980 in Schofield to \$1,516 in Kronenwetter. Housing is considered to be affordable when all housing costs, including mortgages or rent, utilities, insurance, etc., is thirty percent of a

household’s income. When a household pays more than this percentage, they are considered to be “cost burdened”. In the metro region, 3,627 homeowners, 26.4 percent, with a mortgage were cost burdened. This was less than the county (27.5%), the state (31.0%), and the nation (34.2%).

There were 7,866 homeowner households without a mortgage. The median monthly housing cost for this population was \$481 in Marathon County. Within the metro region, median costs ranged from \$411 in Schofield to \$540 in Rib Mountain. 10.9 percent of these households are cost burdened.

The gross median rent was \$690 in Marathon County, and ranged from \$653 in both Marathon City and Wausau to \$925 in Kronenwetter. Of the 11,079 renters in the metro region, 48.7 percent were cost burdened. This is similar to the Wisconsin rate of 48.2 percent and 3.6 percentage points less the nation. While gross median rent is considerably less than the monthly housing costs of a household with a mortgage, generally renters have lower incomes, creating a high percentage of renter households who are cost burdened.

*Housing Units Projections*

**Table 2.7: Total Housing Units Needed**

<i>Minor Civil Division</i>	<i>2015</i>	<i>2020</i>	<i>2025</i>	<i>2030</i>	<i>2035</i>	<i>2040</i>
Kronenwetter	2,967	3,249	3,510	3,757	3,979	4,158
Marathon City	647	659	663	665	662	651
Rothschild	2,387	2,491	2,572	2,639	2,688	2,709
Weston	6,709	7,312	7,856	8,375	8,827	9,187
Mosinee	1,837	1,903	1,950	1,989	2,013	2,015
Schofield	1,110	1,139	1,151	1,160	1,161	1,149
Wausau	18,512	19,152	19,596	19,916	20,064	20,003
Rib Mountain	2,817	2,907	2,971	3,018	3,044	3,038

*Source: U.S. Census, WDOA 2013, NCWRPC*

Along with the population projections, the WDOA also released projected household sizes in 2013. A simple calculation can be made from

these numbers to estimate the number of housing units that will be needed in the future, by taking the projected population and dividing by the projected number of persons per household. Table 2.7 displays the number of housing units needed when vacancy rates are taken into account.

**Trends and Issues**

**Slowing Population**

A growing population is a sign of economic vitality and is essential to increasing the quality of life in a region. The labor force is directly tied to the population-as the population increases, there is a greater number of consumers and workers in the region. More consumers increase demand creating a need for more workers. A greater number of workers increase productivity and generate higher revenues. With greater revenues, workers share a greater slice of the economic

pie and therefore demand more goods. The cyclical nature of this results in more workers being hired to meet demand, decreasing unemployment and resulting in more productivity.

Without adding more workers to the labor force, unless worker productivity is greatly increased, the Gross Regional Product flat lines. This results in stagnant wages and sluggish consumer demand. Low consumer demands results in lower employment rates.

As the population ages and more people leave the labor force, as is the trend in Wisconsin and the metro region, there will be greater dependence on transfer payments to retirees to stimulate the economy. However, the real rate of growth of Social Security payments has been less than the growth of real earnings, meaning that there is little chance of increased demand from this population segment. Furthermore, this population's demand will be slanted towards healthcare and social services, and not towards industries that have traditionally sustained the metro region.

Slow economic growth implications are that there is no growing pie to divide and living standards stagnate. Unemployment increases as companies need fewer workers due to lack of demand. Slower growth also results in a smaller tax base for governments which generally plan their spending and debt financing on the assumption of growth. As government revenues are stagnant in real terms, new construction and maintenance of public infrastructure will be more burdensome to users who also have stagnant or decreasing real incomes.

Slower growth rates have been worrisome for state policy makers as well as the within the metro region for some time. Wisconsin's population growth rates have been slower than the nations since the 1970s, and the metro region's growth rate has been slower since the 1980s. Furthermore, the state and metro region are projected to trail the nation approximately 9 percentage points in population growth from 2010 to 2040. The growth rates in the state, county and the metro region have been slower due to more people migrating from the area rather than to it.

### **Meeting Changing Preferences**

Communities will face the challenge of meeting the needs and preferences of the population as it changes. An aging population requires increased medical services and facilities. At the same time, this population segment usually has housing preferences and needs that are different than the rest of the population. Preferences in housing range from smaller one story houses with little maintenance to full-fledged retirement communities. At the same time, there will be an increased need for assisted living facilities as well as nursing homes. Furthermore, Baby Boomers are indicating preferences for walkable communities as they look for places to retire. As driving becomes more difficult for older adults, serious efforts need to be made to ensure alternative transportation infrastructure and services.

At the same time, young adults are seeking alternative infrastructure when choosing communities as well. As discussed earlier in this chapter young adults have been leaving the area for decades, while adults in their 30s move to the area. This decades old trend is unlikely to change. However, it is important to note that younger adults are signaling different preferences compared to past generations at this stage of life that will have implications for public infrastructure and economic development as they move back into the area. According to the University of Wisconsin-Extension, millennials ranked the importance of walkability, convenience of public transportation, shorter distances to shopping, entertainment, family, friends, work, schools, parks and recreational areas higher than previous generations, along with the quality of local public schools. They also placed lower importance on the space between neighbors.



## Chapter 3: Metro Region Labor Force

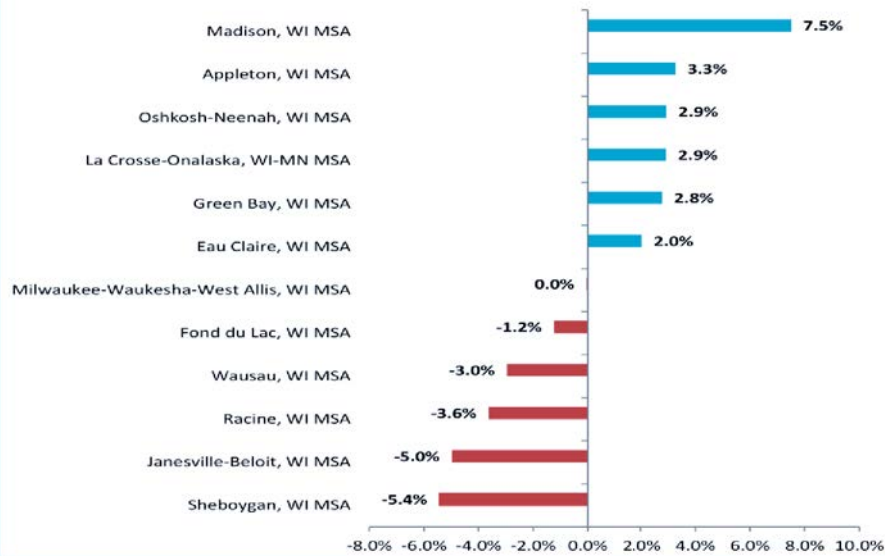
The purpose of this chapter is to analyze the metro region resident labor force. This includes changes in resident employment, labor force participation rates, unemployment, education, employment by industry, median wages by industry, and commutes and destinations.

### Resident Employment

According to the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program there were 41,013 residents of the Metro Region were employed both inside and outside of the region in 2014. The LEDH program utilizes the Quarterly Census of Employment and Wages, which only counts filled jobs, part and full time, temporary or permanent, by the place of work. Workers holding more than one job are likely counted twice as it is a count of jobs. Major exclusions from this census included self-employed workers, most agricultural workers on small farms, all members of the Armed Forces, and elected officials in most states, most employees of railroads, some domestic workers, student workers, and employees of certain small nonprofit organization.

From 2010 to 2014, the number of jobs held by residents decreased by 605 from 41,618 in 2010. However, from 2000 to 2014, the number of jobs decreased by 247, declining at -.6 percent. Simultaneously, unemployment rates dropped from 2010 from 7.7 percent to 7.6 percent in 2014, as labor force participation rates also dropped.

**Non-Farm Employment Job Recovery, 2006-2015**



### Wisconsin MSAs

Only seven out of the 12 Wisconsin MSAs have recovered all the jobs lost since 2006. The Madison has seen 7.5 percent growth in employment since 2006. Appleton, Oshkosh-Neenah, La Crosse-Onalaska, Green Bay, and Eau Claire have all seen job growth rates around 2 to 3 percent. The Milwaukee-Waukesha-West Allis MSA recovered all of its jobs in 2015. Wausau had three percent fewer jobs in 2015 than it did in 2006. However, Wausau also has reached unemployment levels seen before the recession, indicating that there are fewer people in the labor force.

The Labor Force Participation Rate (LFPR) is an important metric of economic vitality. It measures the share of population 16 years or older that is employed, actively seek work, or laid off. A high LFPR is a sign that a region is reaching its economic potential, because more workers denote higher productivity and therefore, a higher gross regional product and a higher quality of life.

Within the metro region, the LFPR was at 71.3 percent, higher than the county rate (70.2%), the state (67.4%), and the nation (63.9%) in 2014. This is a decrease from 73.1 percent in 2000. The state’s LFPR was 5.5 percentage points lower than the LFPR peak in 1997.

### Education

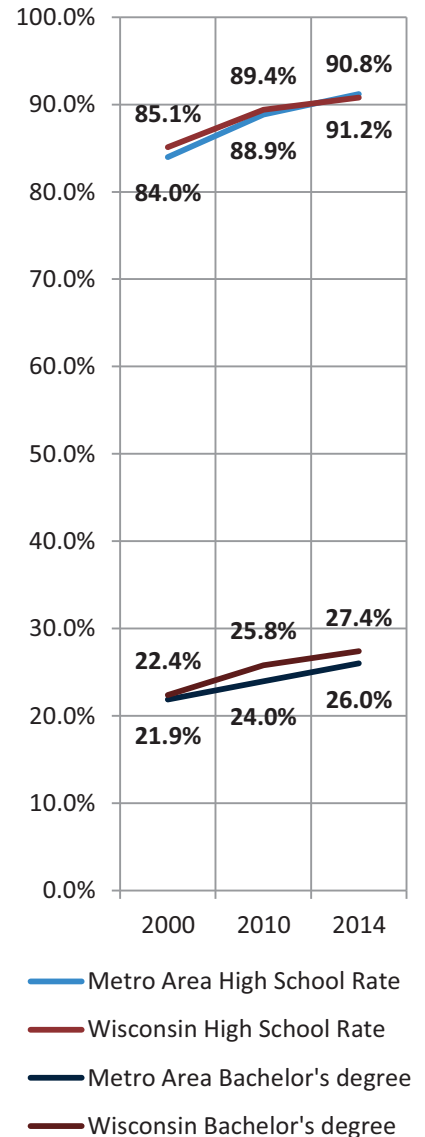
Education levels have been improving for residents in the area, as seen in Figure 3.1. In 2014, 91.2 percent of the population in the metro region had a high school education or higher, an increase of 7.2 percentage points from 2000. This was also .4 percentage points higher than the state and 4.9 percentage points higher than the nation’s rate.

In terms of higher education, 26.0 percent of the metro region’s population had a Bachelor’s degree or higher, an increase of 4.1 percentage points from 2000. The area is still behind the state at 27.4 percent as well as the nation at 29.3 percent. These educational figures only include adults over the age of 25. Figure 3.2 displays the education levels by for varying degrees in 2014.

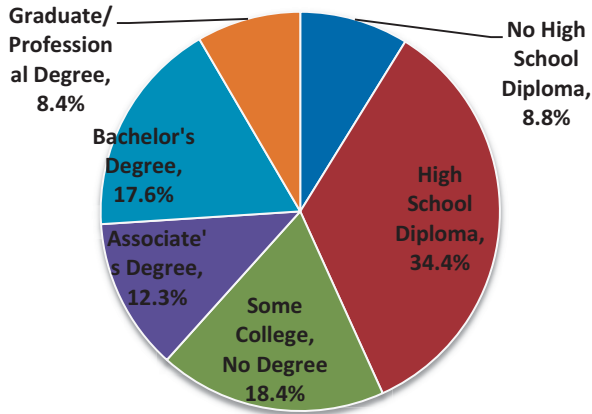
The metro region also has six post-secondary education institutions. This includes the North Central Technical College, which had 3,426 students enrolled in 2015. In 2015, 1,820 students completed their programs. 76% of these students worked in the Northcentral Technical College District, which includes Marathon County. The school offered courses in over 185 associate degree, technical diploma and certificates in 2016. Figure 3.3 shows the top six programs at the college by number of graduates.

In 2016, there were 978 students enrolled at UW-Marathon County, a two year college. The school has 14 departments and students can begin over 250 majors before transferring to a four year institution.

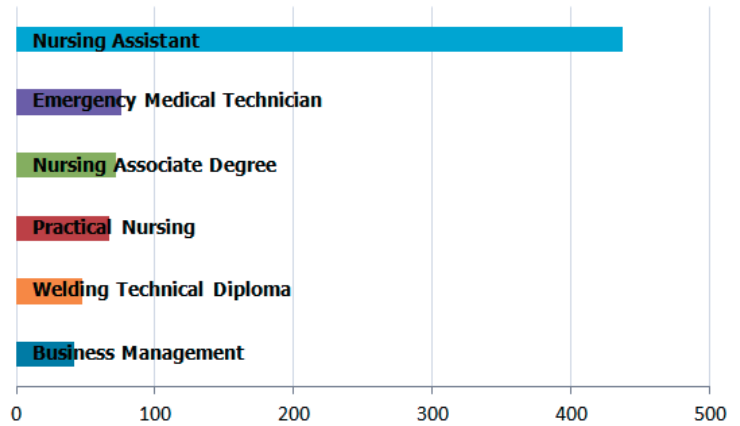
**FIGURE 3.1**  
**Educational Attainment**



**FIGURE 3.2**  
**Educational Attainment, 2014**



**FIGURE 3.3**  
**Top 6 Programs by # of Graduates**  
**NORTHCENTRAL TECHNICAL COLLEGE, 2015**



Median Salary

The median wage for Marathon County was \$41,223 in 2014 for full time year-round workers. This was \$2,017 lower than the state and \$2,955 lower than the national median. Generally the median wages by industry are lower than the state medians, with exceptions of 2 out of 13 industries: the Finance and Insurance, and Real Estate and Rental and Leasing and the Other Services Industries.

**Table 3.1: Median Earnings for Full time, Year Round Employees**

Industry	United States	Wisconsin	Marathon County	Marathon % of State Median	Marathon % of National Median
Total:	\$44,178	\$43,240	\$41,223	95.3%	93.3%
Agriculture, forestry, fishing and hunting, and mining:	\$40,967	\$30,601	\$25,746	84.1%	62.8%
Construction	\$42,365	\$47,471	\$47,190	99.4%	111.4%
Manufacturing	\$47,236	\$45,209	\$41,693	92.2%	88.3%
Wholesale trade	\$46,920	\$46,108	\$41,994	91.1%	89.5%
Retail trade	\$33,170	\$33,565	\$32,223	96.0%	97.1%
Transportation and warehousing, and utilities:	\$50,884	\$51,360	\$47,412	92.3%	93.2%
Information	\$57,217	\$49,532	\$41,101	83.0%	71.8%
Finance and insurance, and real estate and rental and leasing:	\$51,593	\$48,416	\$49,338	101.9%	95.6%
Professional, scientific, management, administrative/ waste management services:	\$54,064	\$48,341	\$44,614	92.3%	82.5%
Educational services, and health care and social assistance:	\$44,293	\$43,931	\$43,068	98.0%	97.2%
Arts, entertainment, and recreation, and accommodation and food services:	\$26,515	\$25,176	\$22,022	87.5%	83.1%
Other services except public administration	\$33,587	\$35,554	\$35,829	100.8%	106.7%
Public administration	\$55,274	\$52,830	\$51,153	96.8%	92.5%

Source: 2014 ACS Five Estimates

When comparing surrounding counties, Marathon County had the third highest median salary out of eight. When comparing individual industries, Marathon County had the highest median salary in the Retail Trade industry and the Finance and Insurance, and Real Estate and Rental and Leasing industry. The county was second in Educational Services, and Health Care and Social Assistance industry, but was fifth in the Manufacturing industry, as displayed in Table 3.2.

**Table 3.2 Median Earnings in Surrounding Counties**

<i>Industry</i>	<i>Clark</i>	<i>Langlade</i>	<i>Lincoln</i>	<i>Marathon</i>	<i>Portage</i>	<i>Shawano</i>	<i>Taylor</i>	<i>Waupaca</i>	<i>Wood</i>
<b>Total:</b>	\$35,527	\$36,514	\$39,453	\$41,223	\$42,071	\$37,388	\$35,869	\$41,792	\$40,740
Agriculture, forestry, fishing and hunting, and mining:	\$29,978	\$32,195	\$37,500	\$25,746	\$34,375	\$25,570	\$30,072	\$27,241	\$32,686
Construction	\$41,759	\$39,609	\$42,950	\$47,190	\$50,740	\$41,553	\$40,045	\$46,393	\$49,054
Manufacturing	\$36,510	\$37,213	\$42,643	\$41,693	\$45,380	\$41,608	\$36,012	\$48,015	\$46,539
Wholesale trade	\$36,806	\$39,000	\$38,952	\$41,994	\$44,194	\$38,017	\$35,250	\$51,607	\$40,605
Retail trade	\$29,360	\$30,598	\$29,560	\$32,223	\$30,541	\$27,054	\$30,188	\$31,111	\$29,638
Transportation and warehousing, and utilities:	\$42,849	\$47,778	\$43,199	\$47,412	\$51,458	\$47,243	\$44,663	\$47,191	\$40,789
Information	\$47,188	\$36,380	\$35,096	\$41,101	\$40,897	\$58,224	\$36,806	\$41,071	\$35,855
Finance and insurance, and real estate and rental and leasing:	\$33,177	\$33,472	\$41,875	\$49,338	\$44,971	\$33,207	\$38,929	\$40,571	\$39,464
Professional, scientific, and management, and administrative and waste management services:	\$36,382	\$40,347	\$37,500	\$44,614	\$45,960	\$37,500	\$41,033	\$35,556	\$36,549
Educational services, and health care and social assistance:	\$35,744	\$35,891	\$38,798	\$43,068	\$43,707	\$39,671	\$37,344	\$35,991	\$42,977
Arts, entertainment, and recreation, and accommodation and food services:	\$20,670	\$25,000	\$21,510	\$22,022	\$20,815	\$29,767	\$27,434	\$24,114	\$24,907
Other services except public administration	\$28,026	\$41,154	\$36,058	\$35,829	\$40,034	\$38,229	\$26,339	\$36,367	\$30,053
Public administration	\$45,929	\$53,578	\$48,229	\$51,153	\$53,669	\$44,750	\$46,161	\$46,791	\$50,307

Source: 2014 ACS Five Year Estimates

### Resident Employment by Industry

The Educational Services, and Health Care and Social Assistance Industry was the largest employer of metro residents, employing roughly one in five workers. This sector has been steadily growing, adding 975 jobs since 2000. While the average salary of industry could not be obtained for the metro region, in the county the median salary of this industry was \$43,068.

The Manufacturing Industry was the second largest employer, comprising 18.8 percent of jobs. The median county salary in this industry was \$41,693. Despite experiencing a slight increase in the number of jobs in 2010, this industry lost 1,903 jobs from 2000 to 2014, a decrease of 19.8 percent.

The third largest employer of metro region residents was the Retail Trade Industry, which employed 14.6 percent labor force, 5,988 people. After the 2008 recession, the percentage of

jobs in this industry subsided by 2.7 percentage points but has since made a recovery to prerecession levels.

From 2000 to 2014, the fastest growing three industries were the Professional, Scientific, and Management, Administrative and Waste Management Services industry, the Arts, Entertainment, and Recreation, and Accommodation and Food Services industry, and the Public Administration industry. The Professional, Scientific, and Management, Administrative and Waste Management Services industry increased jobs by 27.2 percent, adding 562 jobs with a median salary of \$44,614. This industry was followed closely the Arts, Entertainment, and Recreation, and Accommodation and Food Services industry which grew 26.5 percent, adding 722 jobs with an average salary of \$22,022. Lastly, the Public Administration expanded 18.3 percent for a net increase of 159 jobs. This industry had an average salary of \$51,153.

**Table 3.3: Resident Employment by Industry for Metro Region, QCEW**

<i>Industry</i>	<i>2000</i>	<i>2010</i>	<i>2014</i>
Agriculture, forestry, fishing and hunting, and mining	0.7%	0.5%	0.7%
Construction	4.6%	4.3%	3.6%
Manufacturing	23.3%	23.5%	18.8%
Wholesale trade	3.2%	3.3%	3.4%
Retail trade	14.6%	11.9%	14.6%
Transportation and warehousing, and utilities	4.4%	4.2%	4.4%
Information	1.8%	1.9%	1.3%
Finance and insurance, and real estate and rental and leasing	9.7%	8.6%	9.6%
Professional, scientific, and man., administrative and waste man. services	5.0%	6.1%	6.4%
Educational services, and health care and social assistance	20.2%	21.9%	22.7%
Arts, entertainment, and recreation, and accommodation and food services	6.6%	8.1%	8.4%
Other services, except public administration	3.9%	3.6%	3.5%
Public administration	2.1%	2.1%	2.5%
Source: 2014 ACS Five Year Estimates			

During the same period, the Information Industry, the Construction Industry, and the Manufacturing Industry experienced the greatest decline in jobs. The Information Industry decreased 28.2 percent, shedding 210 jobs with a median salary of \$47,190. The Construction Industry declined by 22.2 percent, shrinking by 421 jobs with a median salary of \$39,051. Lastly, the Manufacturing Industry had the greatest net loss of jobs, 1,903, declining 19.8 percent.

### Commutes and Employment Destinations

Only 26.3 percent of residents within the metro region work within the minor civil divisions in which they live. This figure would be considerably lower if Wausau was removed from the equation, as 45 percent of its residents both live and work within its political boundaries. Of the 11,004 people in the Wausau area that work in their place of residence, 78.0 percent live in Wausau. Figure 3.4 shows the percentage of working residents that work in their community of residence for each principal community.

**FIGURE 3.4:**  
**Percentage of Working Residents Employed in Respective Resident Community**

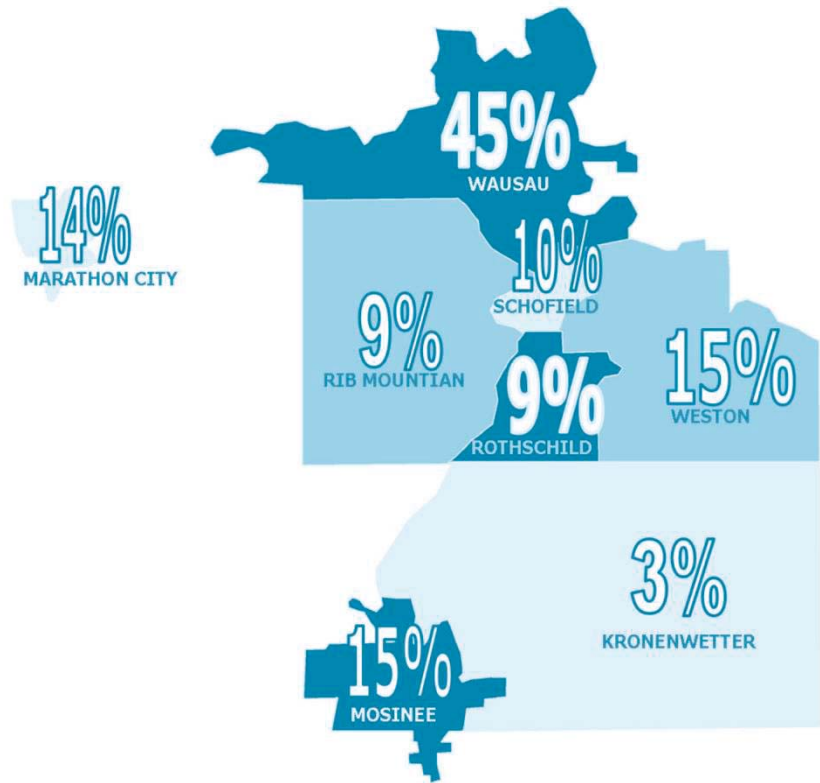


Table 3.4 displays the total number of jobs within each of the communities in the metro region. The table also displays the number of workers that flow from other municipalities to work, the residents that leave the community to work, and the residents that both live and work in the community. The average commute times in the metro region range from 14.3 minutes in Rib Mountain to 22.2 minutes in Kronenwetter.

**Table 3.4: Jobs and Worker Commuter Patterns, 2014**

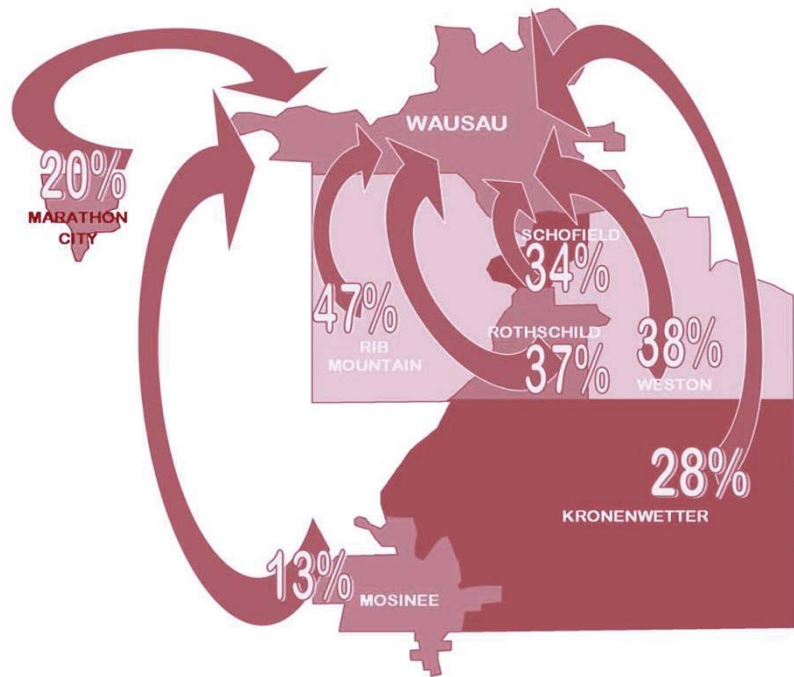
	<b>Total Jobs</b>	<b>Inflow</b>	<b>Outflow</b>	<b>Work and Live</b>
<b>Kronenwetter</b>	1,043	917	4,032	126
<b>Marathon City</b>	2,130	1,977	932	153
<b>Mosinee</b>	2,641	2,278	2,015	363
<b>Rib Mountain</b>	3,479	3,189	3,376	290
<b>Rothschild</b>	3,448	3,227	2,370	221
<b>Schofield</b>	4,023	3,915	992	108
<b>Wausau</b>	32,688	24,106	10,383	8,582
<b>Weston</b>	7,885	6,724	6,804	1,161
<b>Metro region</b>	<b>57,337</b>	n/a	n/a	n/a



**FIGURE 3.5:**  
**Percentage of Working Residents**  
**Employed in the City of Wausau**

Beyond the metro region, the largest importer of Marathon county workers is Wood County (4,312), followed by Portage (1,050) and Lincoln County (951), as displayed in Table 3.8.

The metro region is job center. Even if all of the resident labor force of the metro region worked in this area, 15,429 workers from outside of the area would need to be imported. Within the Wausau city limits, 20.7 percent, or almost 7,000 workers come from the surrounding communities in the metro region. Figure 3.5 displays the percentage of each principal community's resident labor force that works in the City of Wausau.



**Table 3.8: Commuting Patterns for Marathon County, Wisconsin**

People who live in Marathon Co., work in:		People who work in Marathon Co., live in:	
<i>Residence</i>	<i>Estimated # of Workers</i>	<i>Residence</i>	<i>Estimated # of Workers</i>
Marathon	58,747	Marathon	58,747
Wood	4,312	Lincoln	3,396
Portage	1,050	Wood	1,869
Lincoln	951	Portage	1,642
Clark	798	Clark	1,389
Taylor	468	Shawano	1,096
Shawano	467	Langlade	644
Langlade	309	Taylor	512
Oneida	148	Oneida	205
Dane	88	Eau Claire	114
Elsewhere	1,214	Elsewhere	1,335

Source: Wisconsin Department of Workforce Development, 2014

## Trends and Issues

### Labor Shed Patterns and Regional Strategies

The commuting patterns of the metro region residents speak to the interconnectedness of the principal communities in this assessment. Very few residents work where they live. But the majority works in the metro region as evidenced by average commute times. Because municipalities are dependent on each other for their workforces, the economic successes and misfortunes of one community greatly affects the whole metro region. When large industries decline, not only do workers at plants lose income, so do the resident-servicing businesses where the workers spend their income.

### Declining Residential Jobs and Labor Force

From 2000 to 2014, the number of employed residents in the metro region declined -.6 percent as more residents left the labor force, decreasing the Labor Force Participation Rate. The LFPR is still higher in the metro region compared to the state and the nation. Declines in the labor force can be contributed to several trends, including increasing Baby Boomer retirement, more young adults delaying entry into the labor force to pursue educational opportunities, and more controversially, an increase in the long term unemployed who are counted in the labor force once they actively stop searching for work. Given that many of these trends are expected to continue, the LFPR will continue to decline at a faster pace than population growth, leading to a labor shortage, which is discussed further in Chapter 4.

### Education and Workforce Development

A common concern found in the North Central Wisconsin Workforce Development Board was that employers were having a difficult time finding the quality and quantity of workers needed.

As the LFPR shrinks and the Baby Boomers leave the workforce, businesses will continue to have a difficult time finding the quantity and the quality of talent that they need.

Nationally, businesses have already started investing in labor saving technologies to mitigate this problem. As these technologies are implemented, businesses will need a more educated workforce but will also need fewer workers.

In terms of higher education, the county is behind the state averages. Driver industry jobs in the North Central region, including those in manufacturing, healthcare and finance and insurance, as well as many industries, are indicating that they need a more skilled labor force, as evidenced by initiatives such as the Heavy Metal Tour and upcoming college recruitment weekends. As a result, there is a need to increase the number of technical and associate degrees in the workforce.

Efforts to work with secondary and technical schools in the county and region to tailor technology classes to the needs of metro region industries have already started. Also while many schools have moved the focus of education to the sciences and technology, a push to incorporate “soft skills” could also be beneficial, as employers are citing this issue as a problem.



The metro region also imports a large percent of workers to fill jobs from other communities. Workers are not bound to work in their municipality of residence and many workers will travel for a good job. As a result, it would be advantageous to work with the surrounding regions for workforce development. Exploring the workforce needs of surrounding industries and job centers as well as within the metro region is essential to metro region residents in the labor force.

**Lower Median Wages for Workers**

While the median household income was higher than the state and national averages, the median wage for a full-time, year-round worker was 95.3 percent of the state median and only 93.3 percent of the national median. Furthermore, many of the surrounding counties have higher wages in key industries, such as manufacturing as well as accommodation and food services. While employers have difficulty finding workers, this should be noted as well. Efforts should be made to identify what benefits are preferred by employees to decrease high turnover rates.

**Workforce Housing Affordability**

For urban areas, it has not been an uncommon experience for urban areas to see low income households become concentrated in certain communities. This leads to a disproportionate burden on these communities to provide services for low income households while having fewer resources.

Housing and zoning is one of the ways low income households can be concentrated. For decades many communities have opposed multifamily units, believing that these units will lower adjacent property values. This forces many low wage workers to seek rental or other affordable housing options in places other than the communities that they work in. For example, Wausau and Weston have the greatest amount of multifamily and rental units in the metro region. As renter households also tend to have lower incomes, these communities also have the highest rates of poverty and median incomes much lower than surrounding communities.

As presented in the commuter section of this chapter, a great majority of workers within the metro region do not work where they live. While acknowledging that there are many preferences at play when making housing choices, many of these workers likely would have preferred to find housing closer to their place of work but were unable to do so.

Earnings	Kronenwetter		Marathon City		Mosinee		Rib Mountain		Rothschild		Schofield		Wausau		Weston	
	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#
<b>\$1,250 per month or less</b>	25%	261	16%	343	26.1%	689	51%	1,758	27%	938	11%	455	23%	7,420	24%	1,916
<b>\$1,251 to \$3,333 per month</b>	38%	392	59%	1,261	26.6%	703	33%	1,134	20%	683	26%	1,054	38%	12,487	40%	3,102
<b>More than \$3,333 per month</b>	37%	390	26%	550	47.3%	1,249	16%	552	53%	1,824	63%	2,514	39%	12,781	36%	2,827

Source: U.S. Census, On the Map, 2014

Table 3.9 shows earnings for workers by month for each municipality for 2014. In Rib Mountain, 51 percent of jobs (1,758 workers) within the town boundaries earn \$1,250 per month or less. Yet, as shown in Table 3.10, only 25.4 percent of working Rib Mountain residents (792 residents) earn \$1,250 or less per month. Rib Mountain has some of the highest monthly housing costs and only 4 percent of the rental market in the metro region. By contrast in Weston, 24 percent of workers (1,916 workers) earn \$1,250 or less per month while 26.9 percent of Weston residents (2,143 residents) earn \$1,250 or less per month. Weston has 19 percent of the rental market in the metro region and 37 percent of its housing stock is rental.

Earnings	Kronenwetter		Marathon City		Mosinee		Rib Mountain		Rothschild		Schofield		Wausau		Weston	
	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#
<b>\$1,250 per month or less</b>	24%	1,002	29%	309	25.4%	604	25%	792	28%	718	27%	292	28%	5,329	27%	2,143
<b>\$1,251 to \$3,333 per month</b>	34%	1,401	36%	385	56.8%	790	30%	948	36%	938	47%	512	39%	7,434	36%	2,891
<b>More than \$3,333 per month</b>	42%	1,759	36%	391	20.7%	493	44%	1,379	36%	935	27%	297	33%	6,183	37%	2,931

Source: U.S. Census, On the Map, 2014

While traditionally communities have not considered housing to be a workforce issue, employers are starting to realize the difficulty of attracting a workforce in a community without the housing stock available to meet their workers housing preferences.

## Chapter 4: Metro Region Economic Analysis

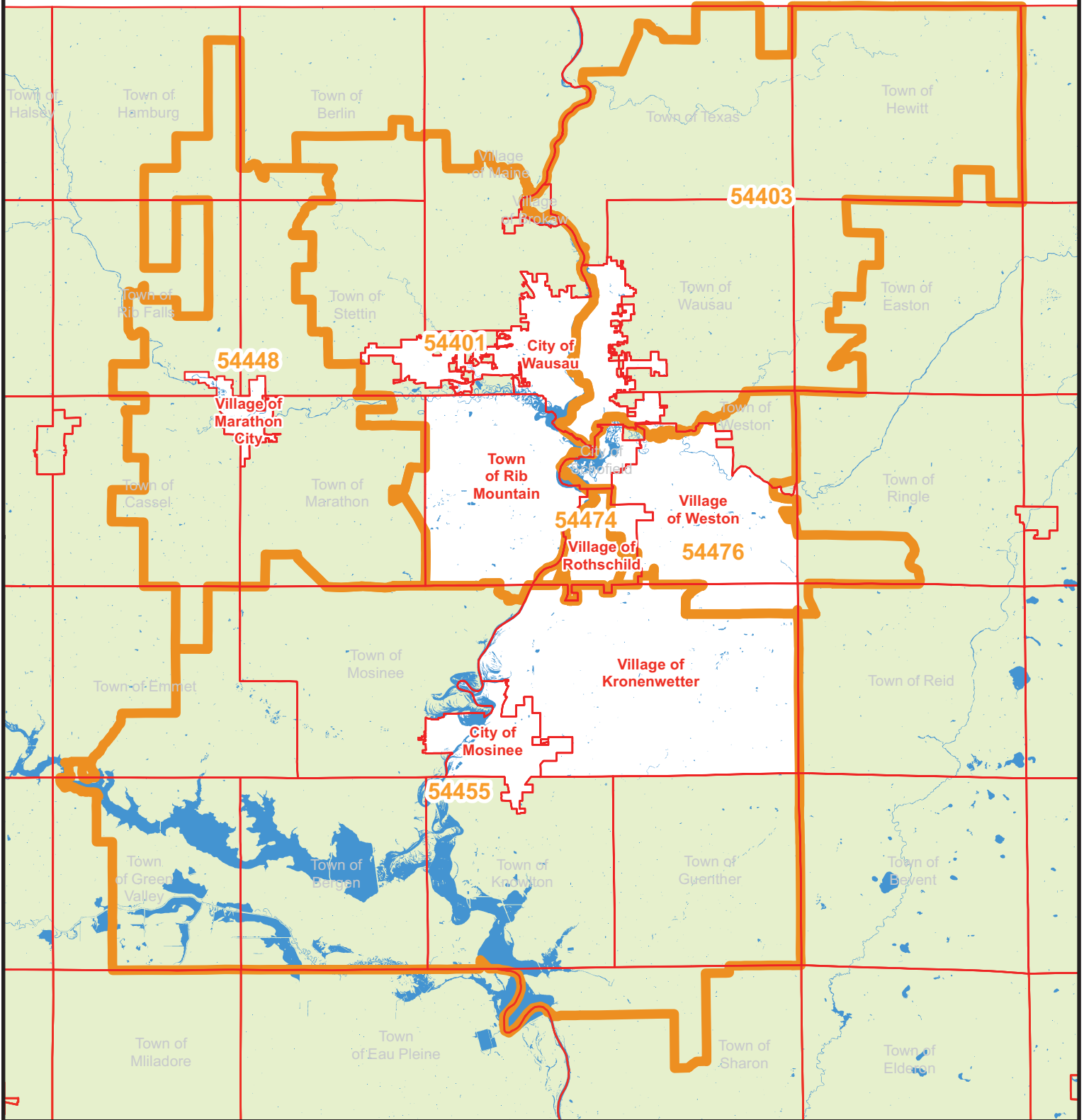
The purpose of this chapter is to assess past and current employment and industry data as well as projections for the metro region. Unlike the previous chapter which looked at the resident labor force of the metro region, this chapter focuses on jobs and industries actually located in the boundaries of the metro region. This chapter works to identify regional economic trends by examining past job and industry trends, job projections and job openings, and the Gross Regional Product. Additionally, this assessment utilizes industry location quotient analysis, consumer and industry gap analysis, and cluster analysis techniques.

### Data

The data for this chapter comes mainly from the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program as well as EMSI's labor market dataset (2016.3 Class of Worker), which provides historical, unsuppressed and up-to-date data from a number of federal departments to project industry and occupational trends. Data from EMSI starts in the year 2001. For consistency, when speaking about current and past trends, the year 2014 is used to match the data in previous chapters. When talking about future projections, 2016 is used as the base year and five and ten year increments are utilized. Additionally, projections for job openings were derived from the Bureau of Labor Statistics.

While the U.S. Census Longitudinal Employer-Household Dynamics program allows us to gather data at the municipal level, EMSI does not have this feature for smaller communities. Therefore, when using EMSI data, metro region six zip codes are used. The areas in the zip codes are slightly larger than the metro region's actual political boundaries, which accounts for some of the agricultural and mining activities discussed in this chapter, as shown in Map 3. Using the boundaries of the Wausau Metropolitan Statistical Area (MSA) was an option for this assessment; however, the zip codes provided a closer approximation to the principal communities in this study.

The zip code boundaries are considerably larger than the metro region boundaries. However in 2014 LEHD estimated that there were 57,337 jobs in the metro region boundaries and EMSI estimated that there were 59,971 jobs in the zip code boundaries. This is a difference of 2,600 jobs, meaning that most of the economic activity discussed in this chapter does indeed occur in the metro region boundaries.



Legend

- Minor Civil Divisions
- ZIP Code Boundaries
- Water



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Wisconsin Regional  
Planning Commission

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## Local Employment

### *Total Metro Region Employment*

According to the U.S. Census Longitudinal Employer-Household Dynamics within the Metro Region, there were 57,337 jobs in 2014. This included both primary and second jobs, but not non-QCEW jobs. Jobs within the metro region did increase 5.4 percent since 2010. However, jobs only increased 3.3 percent since 2001, as the economy had to catch-up on jobs lost during the recession. In Wisconsin, the number of jobs decreased .7 percent while the nation increased 3.4 percent.

### *Employment by Sector*

Changes in employment by industry are shown in Table 4.1. Within the metro region, the largest employer was the Manufacturing industry which employed 21.4 percent of area labor force in 2014. This industry was followed by the Educational Services industry and Health Care and Social Assistance industry as the second and third largest employers. It employed 15.7 percent of the labor force or 9,424 workers. The third largest industry was Retail Trade, which had 7,226 workers, or 12.0 percent.

From 2000 to 2014, the three fastest growing industries were the Educational Services, and Health Care and Social Assistance industry, the Agriculture, Forestry, Fishing and Hunting, and Mining industry, and the Professional, Scientific, and Management, and Administrative and Waste Management Services industry. The Educational Services, and Health Care and Social Assistance industry grew 92.9 percent, adding 4,539 jobs. This was followed by the Agriculture, Forestry, Fishing and Hunting, and Mining industry which grew 48.8 percent, which equated to 218 jobs. Lastly, the Professional, Scientific, and Management, and Administrative and Waste Management Services industries grew 34.1 percent, adding 1,155 jobs.

**Table 4.1: Metro Region Proportion of Workforce by Industry**

<b>Industry</b>	<b>2000</b>	<b>2010</b>	<b>2014</b>
Agriculture, forestry, fishing and hunting, and mining	0.8%	1.0%	1.1%
Construction	3.8%	2.7%	2.9%
Manufacturing	26.4%	21.4%	21.4%
Wholesale trade	6.1%	6.5%	6.1%
Retail trade	13.6%	11.8%	12.0%
Transportation and warehousing, and utilities	4.4%	3.9%	3.8%
Information	1.3%	0.9%	0.7%
Finance and insurance, and real estate and rental and leasing	7.5%	8.3%	7.1%
Professional, scientific, and management, and waste management services	5.8%	7.1%	7.6%
Educational services, and health care and social assistance	8.4%	13.6%	15.7%
Arts, entertainment, and recreation, and accommodation and food services	7.9%	8.6%	8.6%
Other services, except public administration	3.1%	2.9%	2.5%
Public administration	10.8%	11.2%	10.5%

Source: Emsi 2014, NCWRPC

In the metro region the industries that saw the greatest declines during this period were the Information industry, Construction industry, and the “Other Services, Except Public Administration” industry. The Information industry declined 46.8 percent, losing 359 workers. The Construction industry lost 443 workers, or 20.3 percent. The “Other Services” Industry decreased by 19.5 percent, which was 356 jobs. Overall, the Manufacturing industry saw the largest losses, shredding 2,461 jobs.

**Table 4.2: Metro Region Employment Projections by Industry**

<i>Industry</i>	<i>2016 Jobs</i>	<i>2026 Jobs</i>	<i>2016 - 2026 Net Change</i>	<i>2016 - 2026 % Change</i>	<i>2016 Location Quotient</i>
Crop and Animal Production	612	682	70	11.4%	1.12
Mining, Quarrying, and Oil and Gas Extraction	96	139	43	44.8%	0.36
Utilities	317	240	-77	-24.3%	1.30
Construction	2,074	2,332	258	12.4%	0.71
Manufacturing	13,368	12,851	-517	-3.9%	2.51
Wholesale Trade	3,681	3,638	-43	-1.2%	1.43
Retail Trade	7,075	7,444	369	5.2%	1.02
Transportation and Warehousing	1,990	1,847	-143	-7.2%	0.98
Information	381	281	-100	-26.2%	0.31
Finance and Insurance	3,856	3,946	90	2.3%	1.52
Real Estate and Rental and Leasing	450	514	64	14.2%	0.49
Professional, Scientific, and Technical Services	1,883	2,219	336	17.8%	0.49
Management of Companies and Enterprises	1,451	1,775	324	22.3%	1.48
Administrative and Support and Waste Management and Remediation Services	1,760	2,166	406	23.1%	0.45
Educational Services	191	226	35	18.3%	0.16
Health Care and Social Assistance	9,540	12,426	2,886	30.3%	1.16
Arts, Entertainment, and Recreation	795	927	132	16.6%	0.82
Accommodation and Food Services	4,361	4,934	573	13.1%	0.76
Other Services (except Public Administration)	1,481	1,396	-85	-5.7%	0.79
Government	6,335	6,406	71	1.1%	0.69
<b>Total</b>	<b>61,696</b>	<b>66,391</b>	<b>4,695</b>	<b>7.6%</b>	

Source: Emsi, 2016

*Employment Projections by Sector*

Employment projections were made using shift-share analysis. While a location quotient analysis provides a snapshot of the economy at a given time, shift-share analysis introduces trend analysis (change over a period of time). This is an analysis technique that examines economic change and incorporates a “what-if” component. The theory behind shift-share is that local economic trends can be determined to be “up “or “down” relative to national trends, called the National Growth Component. It also identifies if the growth is in fast or slow growing industries or sectors, called the Industrial Mix; and finally, it identifies how competitive an area is for

attracting different economic sectors, called the Competitive Share. Both models use the same employment data.

The industrial mix effect represents the share of regional industry growth explained by the growth of the specific industry at the national level. The national growth effect explains how much the regional industry's growth is explained by the overall growth in the national economy. The regional competitiveness effect explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses, because the growth cannot be explained by national trends in that industry or the economy as a whole. As a result of the national growth, the metro region should continue to grow as well.

The metro region is expected to continue to add jobs during the next 10 years, but at a slower pace than the state and the nation. By 2026, the metro region is expected to increase 8 percent from 2016. Based on National Growth Effect (6,330), an Industry Mix Effect (-960), and the Competitive Effect (-513) the region would expect to add 4,695 jobs in this industry over the next ten year time period based on a shift share analysis. Net changes in jobs by industry can be seen in Table 4.2. By comparison, Wisconsin jobs are expected to grow 9 percent and the nation is expected to grow 10 percent.

In terms of net jobs added, the Health Care and Social Assistance sector, the Accommodation and Food Services sector, and Administrative and Support and Waste Management and Remediation Services sector are projected to have the most growth. In the Health Care and Social Assistance sector, 2,886 jobs are expected to be added. In the Accommodation and Food Services industry roughly 573 jobs will be added to in the hotel and motel subindustries. The Administrative and Support and Waste Management and Remediation Services sector will add 406 jobs.

Within the Health Care and Social Assistance Industry gains in employment will be diverse, especially compared to other industries. Employment will significantly increase in the Ambulatory Health Care Services subindustry which includes the Offices of Physicians, Dentists and Other Health Practitioners, Outpatient Care Centers, Medical and Diagnostic Laboratories, Home Health Care and Services. Hospitals, Nursing and Residential Care Facilities, and Social Assistance are also expected to make gains.

The Mining, Quarrying, and Oil and Gas Extraction industry is expected to be the fastest growing industry, increasing jobs by 44.8 percent, which equates to 43 jobs. While jobs in Dimension Stone Mining and Quarrying are expected to drop a third, the gains will be made in the Crushed and Broken Granite Mining and Quarrying subsector.

The Manufacturing, Transportation and Warehousing, and Information industries are expected to shed the most jobs. Manufacturing will lose 517 jobs, shrinking 7.6 percent. Most of the jobs lost in this industry are expected to be in the Millwork subindustries and the Pulp Mills. Transportation and Warehousing will drop about 143 jobs, mostly in General Freight Trucking, Long Distance subindustry. This equates a 7.2 percent decrease. Lastly, the Information industry will lose 26.2 percent which designates this industry as the fastest declining industry. The



information industry is made up of media type jobs, such as radio broadcaster and newspaper journalist. Jobs lost in this sector will be in the Wired Telecommunication Carriers subindustry.

*Job Openings*

While the metro region will grow by 4,695 jobs, between 2016 and 2026, there will be 22,108 job openings in the metro region. This was calculated by the Bureau of Labor Statistics and are generally considered to be conservative estimates, as it equates to the minimum number of workers that will need to be trained for these openings due to new positions, retirements, and workers otherwise permanently leaving the occupation, due to deaths and career changes. It does not account for workers who leave the metro region to work in another region. A table of all occupational job openings greater than 100 can be found in Appendix A.

Of the occupations with ten or more expected job openings over the next ten years, 34 percent will require a high school degree for typical entry level education, while 32 percent will require no formal education, according to EMSI data, which, in some cases, seems to underestimate the level of education required by today’s employers. Many of these jobs are retail and service positions, including retail salespersons (820 openings), cashiers (706 openings), combined food preparation and serving workers, including fast food (650 openings), waiters and waitresses (432 openings), bartenders (287 openings), and cooks (182 openings). Unfortunately many of these openings are not living wage jobs.

Among the 4,300 job openings that require an advanced degree, Bachelor’s degree or higher, the occupations with the most openings were registered nurses (741 openings), general and operations managers (285 openings), accountants and auditors (272 openings), elementary school teachers, except special education (129 openings) and medical and health service managers (124 openings).

**Wisconsin MSAs-Manufacturing Jobs**

Manufacturing is a vital part of economies across the state. However, most of the MSAs have not recovered the manufacturing jobs lost during the Great Recession. The Milwaukee-Waukesha-West Allis MSA has lost the most manufacturing jobs over all since 2006, shedding 12,200 jobs. Janesville-Beloit MSA saw the greatest percentage decline, at -34.2 percent. The Wausau MSA lost 9.5 percent of its manufacturing jobs since 2006. The Appleton MSA, or the Fox River Valley, was the only MSA to have regained all of its Manufacturing jobs by 2015, after losing 12.3 percent between 2006 and 2010.

MSA Manufacturing Jobs, 2006-2015			
Area	2015	2006-2015 Net Change	2006-2015 % Change
Appleton, WI MSA	24,000	500	2.1%
Fond du Lac, WI MSA	10,700	-200	-1.8%
Green Bay, WI MSA	29,500	-900	-3.0%
Racine, WI MSA	18,600	-600	-3.1%
Oshkosh-Neenah, WI MSA	22,400	-1,100	-4.7%
Madison, WI MSA	33,500	-2,500	-6.9%
Eau Claire, WI MSA	10,500	-1,000	-8.7%
Milwaukee-Waukesha-West Allis, WI MSA	121,000	-12,200	-9.2%
Wausau, WI MSA	16,200	-1,700	-9.5%
Sheboygan, WI MSA	20,600	-2,600	-11.2%
La Crosse-Onalaska, WI-MN MSA	8,400	-1,300	-13.4%
Janesville-Beloit, WI MSA	9,600	-5,000	-34.2%



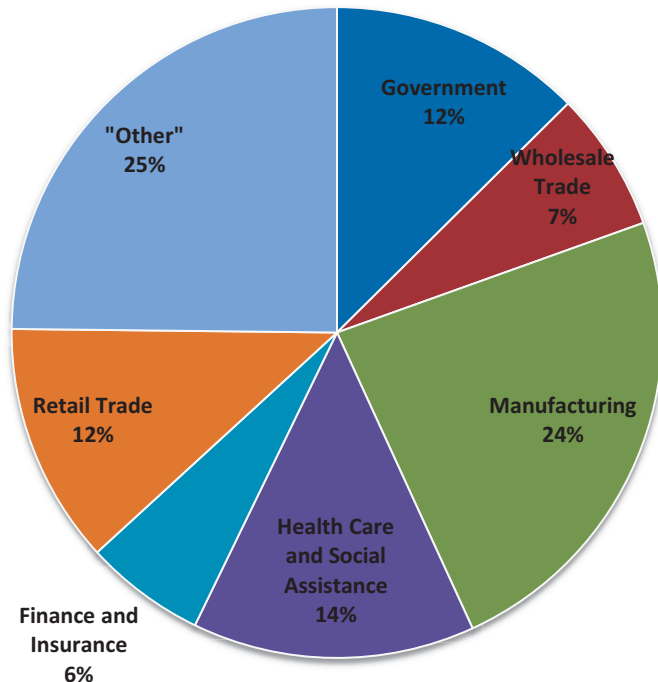
Among occupations associated with the manufacturing industry, there are expected to be roughly 5,000 openings. This is only for occupations with at least 100 jobs in the manufacturing industry in 2016. This equaled 38 occupations according to EMSI. The 5,000 openings also capture openings for occupations that work in multiple industries. For example, the occupation titled “laborers and freight, stock and material movers, hand” had 456 positions in the manufacturing industry, but 1,567 in the overall economy.

The manufacturing associated occupations with the most openings were laborers and freight, stock and material movers, hand (524 openings), office clerks (493 openings), customer service representatives (379 openings), team assemblers (343 openings), and general and operations managers (343 openings). With the exception of general and operations managers, none of those positions were living wage jobs (Living hourly wages for 2 working adults and 2 children is \$15.78 per hour in Marathon County).

Among living wage jobs, there will be 178 openings for welders, cutters, solderers, and brazers, 158 openings for machinists, 130 openings for computer-controlled machine tool operating workers, 110 openings for packaging and filing machine operators and tenders, and 87 openings industrial machinery mechanics. According to EMSI, the majority of these jobs required no education beyond a high school degree or experience. However, based on anecdotal evidence,

many employers are seeking individuals trained at the technical college or through apprenticeships. Furthermore, roughly two hundred engineers in various fields, including mechanical and industrial, will be needed.

**FIGURE 4.1**  
**Marathon County Industries**  
**with the Most Employees 55+**



*Industries with high percentage of workers over 55\**

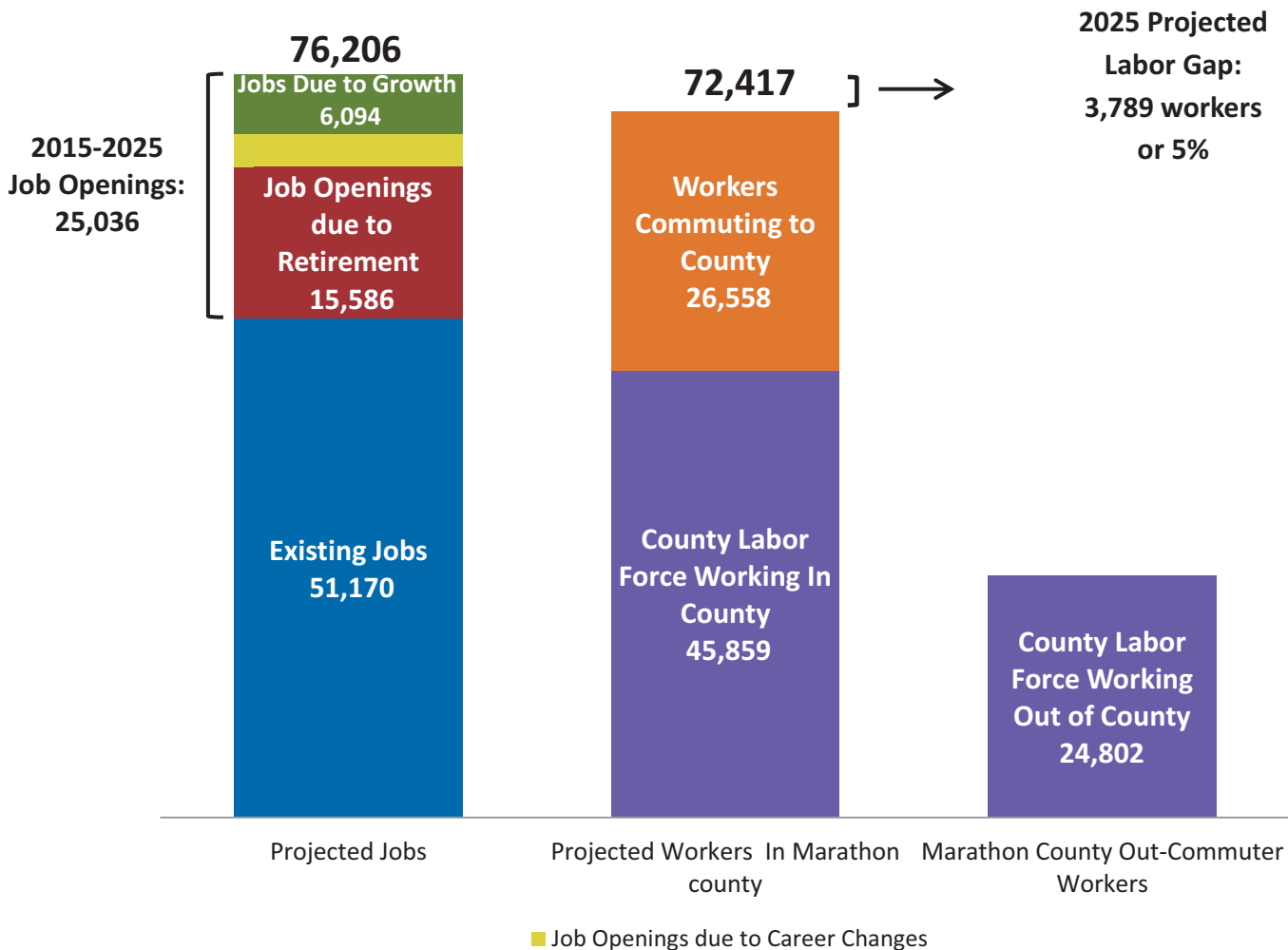
At the county level, the majority (63%) of job openings are being driven by retirements, while only 23 percent were driven by new jobs added to the economy. While worker age cohorts were not available at the zip code level used in this assessment, it is reasonable

to assume that applies to the metro region as well.

According to the Bureau of Labor Statistics, the LFPR drops swiftly after workers reach this age and demographers expect the Baby Boomers will begin to leave the labor force in unprecedented numbers, although the exodus does appear to have been delayed due to the 2008 recession. In 2016, the youngest Baby Boomer will turn 52 years old. In 2014, 22.6 percent of the employees within Marathon County were over the age of 55 years old. Figure 4.1 presents industries that have a high number of workers near retirement.

*Labor Shortage*

**FIGURE 4.2: Marathon County Projected Labor Gap**



In 2025, Marathon County is projected to have 76,000 jobs, and a total of 25,000 job openings from 2015 to 2025, as shown in the first bar in Figure 4.2. If the metro area population projections are accurate, the Labor Force Participation Rate continues to decline at the same

rate was seen in the previous decade (5.21% decrease) and worker commuting patterns remain relatively stable, Marathon County should expect a labor shortage of 4,000 workers by 2025.

## Local Economy

### *Gross Regional Product (GRP)*

The total Gross Regional Product (GRP) in 2014 was over 5 billion dollars in the metro region. GRP, similar to GDP, is a measure of the final market value of all goods and services produced in a region. This figure is the sum of earnings, property income, and taxes on production. By industry, Manufacturing was the highest grossing industry, producing over 1.1 billion dollars, or 22 percent of the area's GRP. The Finance and Insurance industry was second, producing over 617 million dollars, or 12 percent of the GRP. This was followed by the Health Care and Social Assistance industry which generated roughly \$490 million in revenues.

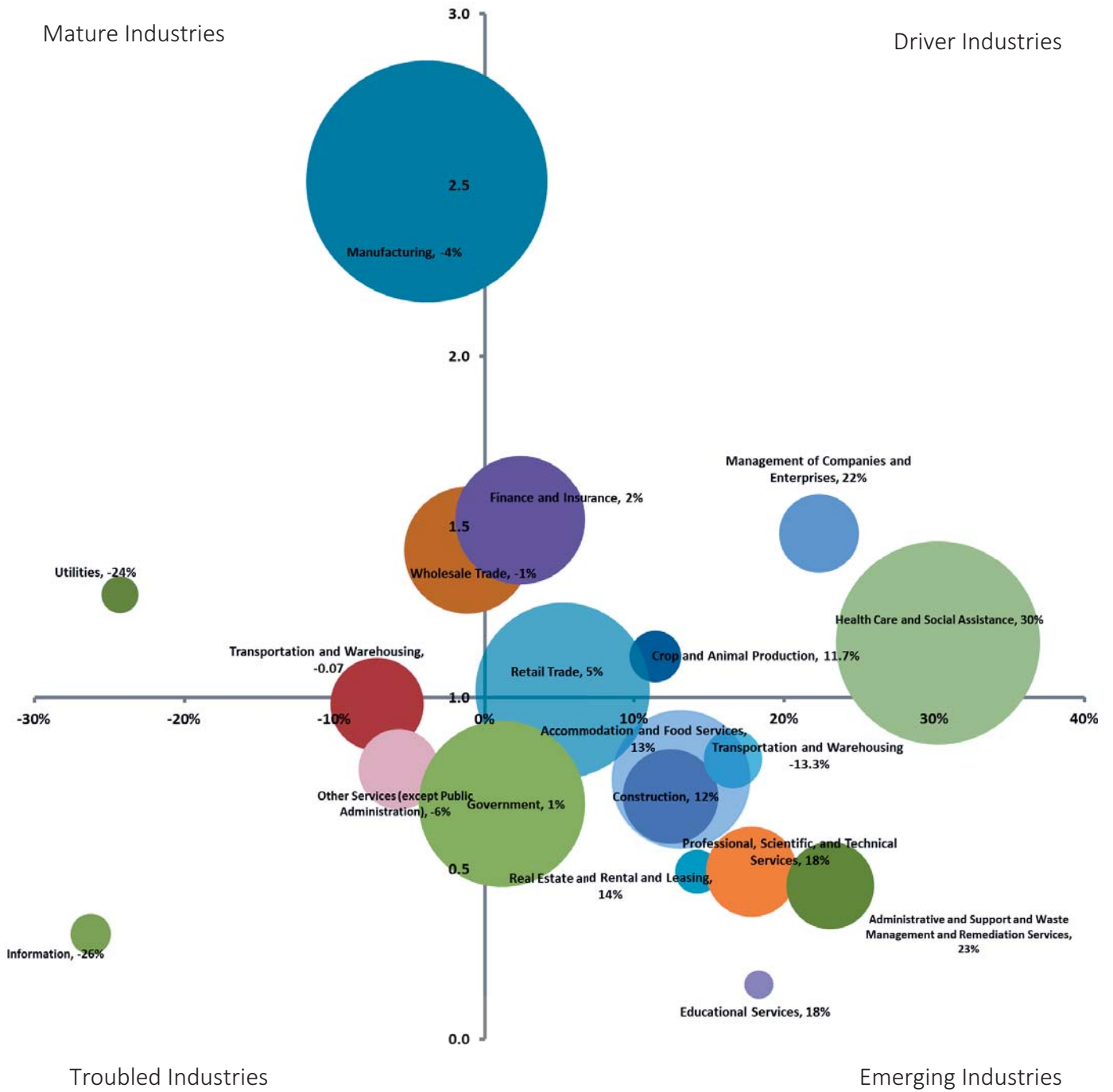
### *Location Quotient Analysis*

A location quotient is a way of quantifying how concentrated an industry is in a region compared to the nation. It can reveal what makes a particular region unique as well as its economic strengths and weaknesses. The location quotient model uses employment information for both a particular region and the nation and compares their ratios of employment to total employment. Based on this information, each industry sector is assigned a numeric value called a location quotient which in turn is used identify export industries.

Export industries are the drivers of the local economy. An industry with a location quotient value greater than one and a relatively large number of jobs is likely considered to be an export industry. The export industry sales bring new money into the regional economy, rather than simply circulating money that is already in the region, as retail or restaurants usually do. The health of exporting industries is vital because their multiplier effect creates jobs in other dependent industries in the local economy.

Import industries have location quotients lower than one. While import industries are less concentrated and are not major drivers of the local economy, they are important for economic diversity. Additionally, identifying import industries can reveal where there may be gaps in demand. Generally, a LQ smaller than .75 indicates that the region is importing goods from that particular sector.

**FIGURE 4.2: Metro Region Location Quotient Quadrant Analysis, 2016-2026**



\*All data for this analysis is in Table 4.2.

The relative strength of a regional industry can be determined using a quadrant analysis. By examining the size and change over time of a industry location quotient value and the number of jobs, *mature, driver, troubled, and emerging industries* can be categorized. Policy makers and economic developers should be aware of large export industries projected to decline in terms of employment, or *mature industries*, as the situation indicates trouble for the entire community. Furthermore, importing industries growing in employment, or “emerging economies,” should be examined for opportunities.

Figure 4.1 displays a quadrant analysis for the metro region from 2016 to 2026. The location quotient of an industry can be determined by its position on the vertical axis and the projected percentage change from 2016 to 2026 on the horizontal axis. The size of each bubble in the figure represents the size of the labor force in each respective industry.

*Driver Industries:*

The driver industries are located in the first quadrant in Figure 4.1, or the upper right corner. Driver industries have above average job concentration, most likely produce enough goods to export, and are expected to increase, defining the region’s economy. Ideally, all of the industries would be in this quadrant. The Management of Companies and Enterprises, the Health Care and Social Assistance, and Crop and Animal Production, and Retail industries are expected to be the driver industries between 2016 and 2026.

The Management of Companies and Enterprises location quotient is expected to increase 15.2 percent by 2026. Jobs in this industry will increase 22 percent, or by 324 jobs, and will be in the Corporate, Subsidiary and Regional Managing Offices Subindustry.

The Health Care and Social Assistance industry has a location quotient of 1.2 and it is expected to increase to 1.3 in 2026. This industry employed 9,540 people in 2014 and had an average annual wage of \$66,493. This is a large industry in terms of jobs for the region; however, the location quotient is small due to high concentrations around the country.

Crop and Animal Production is expected to increase its location quotient 11.7 percent. There were 612 jobs in this industry in 2016. Jobs in this industry are expected to increase in mostly in the Support Activities for Agriculture and Forestry Subindustry and Animal Production and Aquaculture Subindustry. The average earnings per job are \$36,344 which is below the metro region’s overall average annual earnings of \$53,748.

Finance and Insurance is expected to see a 2 percent increase in jobs from 2016 to 2026. Along with Manufacturing, Finance and Insurance is an industry with a long history in the region. While some aspects of the industry are expected to grow jobs, the insurance subindustries, specifically direct property and casualty insurance, are expected to see major declines in jobs.

Lastly, the Retail Trade is a driver economy as well, with a location quotient of 1.02 in 2016 and an expected increase of .2 percent. There were 7,075 people employed in this industry and jobs had average annual earnings of \$30,220.

*Mature Industries:*

Mature industries are located in the second quadrant in Figure 4.2, or in the upper left corner. Mature industries have above average concentration but are declining, possibly affecting the export base and indicating trouble for the economy. There are four maturing industries in the metro region: Manufacturing, Wholesale Trade, and Utilities.

The Manufacturing Industry had the highest location quotient out of all the industries but is expected to decrease .6 percent. However, it is important to note that while some subindustries are declining, others are rising but not enough to produce a net gain in jobs in this industry. The Wood Product Manufacturing, Paper Manufacturing, and Electrical Equipment, Appliance, and Component Manufacturing subindustries are expected to lose the most jobs over the next ten years. The Primary Metal Manufacturing, Fabricated Metal Manufacturing, and Machinery Manufacturing subindustries are expected to increase.

*Troubled Industries:*

Troubled industries are located in the lower left corner, or the third quadrant in Figure 4.2. A troubled industry is less important to the regional economy due to low specialization and is declining, potentially impacting diversity. The Transportation and Warehousing, Information, and Other Services industries will be considered troubled economies over the next decade.

In the Transportation and Warehousing Industry, the location quotient is expected to decrease from 1.0 to .9, a 13.3 percent decrease. This industry is expected to lose 143 jobs, mostly in the General Freight Trucking, Long-Distance subindustry. This industry has average annual earnings of \$46,424.

Wholesale Trade will experience a 7.4 percent decrease while Utilities is expected to have the largest percent decrease in location quotient, 21.4 percent. Each of these industries has higher annual earnings higher than the overall metro region wages.

The Information Industry's location quotient will decrease 26.8 percent, losing 100 jobs. The average annual wage is \$62,633. The Other Services and the Government Industries will decrease 11.2 and 1.2 percent respectively.

*Emerging Industries:*

Emerging industries are located in the lower right corner, or the fourth quadrant in Figure 4.2. An emerging economy is not yet concentrated in the region, but becoming more so with strong potential. There are eight emerging industries. This includes the Real Estate and Rental and Leasing industry, the Government industry, and the Administrative and Support and Waste Management and Remediation Services industry. These industries will increase 7.8 and 9.1 percent respectively.

Top Exporting Subindustries

**FIGURE 4.3**  
**Top Subindustries Quadrant Analysis**

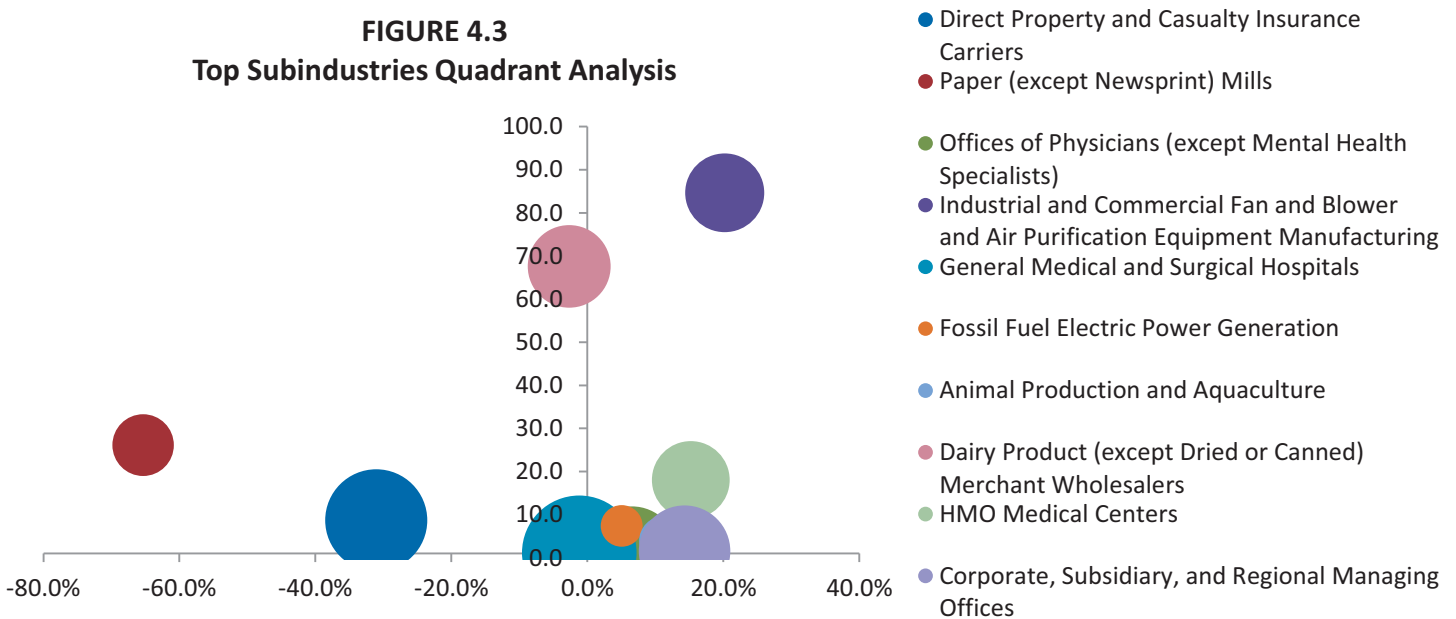


Figure 4.3 displays a quadrant analysis for the subindustries in the metro region with the highest contributions to GRP, excluding government subindustries. This analysis illustrates the metro region’s history while also showing the possible future direction of the economy.

The Direct Property and Casualty Insurance Carriers subindustry generated 354 million dollars in 2014. It employed 1,807 people and had a location quotient of 8.68. Over the next ten years, the location quotient is expected to decrease 31.1 percent and lose 607 jobs. This is a mature subindustry and one that has been prominent in the region since the early part of the 20<sup>th</sup> century.

Other mature economies included the Paper (except Newsprint) Mills, which are another legacy of the early twentieth century. Dairy Product (except Dried or Canned) Merchant Wholesalers

**MSAs Most Concentrated Occupations by LQ, 2 014**

<b>Appleton MSA</b>	Plasterers and Stucco Masons	10.10
<b>Eau Claire MSA</b>	Telemarketers	8.53
<b>Fond du La MSA</b>	Food Batchmakers	5.71
<b>Green Bay MSA</b>	Paper Goods Machine Setters/Operators/Tenders	17.93
<b>Janesville-Beloit MSA</b>	Computer Operators	5.38
<b>La Crosse-Onalaska, WI-MN MSA</b>	Family and General Practitioners	4.58
<b>Madison, WI MSA</b>	Animal Scientists	25.02
<b>Milwaukee-Waukesha-West Allis MSA</b>	Computer Numerically Controlled Machine Tool Programmers, M&P	4.68
<b>Oshkosh-Neenah MSA</b>	Paper Goods Machine Setters/Operators/Tenders	25.98
<b>Racine MSA</b>	Multiple Machine Tool Setters/Operators/Tenders, M&P	9.22
<b>Sheboygan, WI MSA</b>	Molding/Coremaking/Casting Machine Setters/Operators/Tenders, M&P	18.84
<b>Wausau, WI MSA</b>	Woodworking Machine Setters/Operators/Tenders, Except Sawing	8.37

**Wisconsin MSAs-Occupations**

The adjacent table displays the most concentrated occupations when compared to the nation in each Wisconsin MSA and displays the occupation’s location quotient (LQ) score. In the Wausau MSA, the occupation with the highest LQ was Woodworking Machine Setters/Operators/Tenders, Except Sawing.



shows the prominence of agriculture in the region.

While the paper and wood product manufacturing are becoming less prominent, machinery manufacturing is growing in strength. The Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing subindustry was the premier driving economy. This subindustry generated 132 million dollars in revenues in 2014. It employed 1,083 people and is expected to add 383 jobs over the next ten years.

Other driving subindustries included Offices of Physicians, Fossil Fuel Electric Power Generation, Animal Production and Aquaculture, HMO Medical Centers, and Corporate, Subsidiary, and Regional Managing Offices.

### *Business Start-ups and Closures*

According to the UW-Extension Division for Business and Entrepreneurship, in 2000, there were 4.7 thousand businesses in Marathon County. 79.7 percent of those businesses were residential, or headquartered in Marathon County. 8.6 percent of businesses were noncommercial, meaning that they were institutional, meaning they were payrolled locations like schools. By 2014, there were 7.6 thousand businesses, and 82.2 percent were headquartered in Marathon County. 7.0 percent were institutional. The net increase in businesses is a positive sign for Marathon County, not only because it brought an increase of jobs and revenues, but because more businesses were headquartered in the region. This gives more stability to the jobs and revenues located in the region.

Businesses that grew the most over this fifteen year time period were “size one businesses”, or businesses that employed two to nine people. The percentage of these businesses grew 7.6 points. Self-Employed businesses grew .2 percentage points, while size two businesses (10 to 99 employees) grew 4.2 percentage points. Size three businesses (100 to 499) increased 3.2 points while size four businesses (500+) decreased 15.1 percentage points.

While jobs have generally been increasing in the metro region, there is a large amount of movement between job positions in the county as well. In 2014, there were 8.1 thousand people hired or promoted in the county while 6 thousand people quit, retired or lost their jobs.

From 2000 to 2014, sales increased by 2 billion dollars, from 19 to 21 billion dollars. At the same time, the sales per businesses decreased from 4.2 to 2.8 million dollars, most likely due to the rise in small businesses. Productivity decreased per employee by 6.7 percent, from 254 thousand dollars in sales to 238 thousand.

### **Economic Opportunities**

A needs-based economic development strategy, or a “gap” analysis, identifies demands and deficiencies in the local economy and attracts new investment or industries to fill those gaps. While every supply demand cannot be met in-region, by looking at the amount spent by industries on components of its supply chain met outside of metro region, potential opportunities for growth can be identified.



In 2014, metro region industries and consumers spent 11.3 billion dollars. The largest demand, excluding government subindustries, were for the Animal Production and Aquaculture subindustry (406 million dollars). This was followed by Corporate, Subsidiary, and Regional Managing Offices (248 million dollars) and Petroleum Refineries (216 million dollars). A complete list of regional demands for subindustries can be found in Appendix B. Further expansions of subindustries can be obtained from NCWRPC upon request.

**Gap Analysis-Industry Supply Chain**

A gap analysis can look specifically at demands made by industries for their supply chains for production. In 2014, there was 5.8 billion dollars in demand by industries in the metro region for their supply chains. Only 25 percent of the total demand was met by the region. Table 4.3

**Table 4.3: Industries with High Purchases in Supply Chain**

<i>Purchases from</i>	<i>In-region Purchases</i>	<i>Imported Purchases</i>	<i>Total Purchases</i>
Manufacturing	\$299,511,391	\$1,574,804,447	\$1,874,315,837
Finance and Insurance	\$191,742,055	\$440,736,746	\$632,478,801
Crop and Animal Production	\$40,477,457	\$418,935,204	\$459,412,661
Wholesale Trade	\$74,401,456	\$317,315,524	\$391,716,980
Real Estate and Rental and Leasing	\$116,749,500	\$241,243,595	\$357,993,095
Professional, Scientific, and Technical Services	\$103,981,425	\$229,273,838	\$333,255,263
Transportation and Warehousing	\$82,103,342	\$213,140,853	\$295,244,195
Management of Companies and Enterprises	\$24,226,071	\$236,723,706	\$260,949,777
Administrative, Support, Waste Management & Remediation Services	\$64,422,713	\$156,717,057	\$221,139,770
Information	\$40,668,689	\$123,531,280	\$164,199,969

Source: Emsi, 2016

displays the purchases from the industries with the most sales in the region.

**Manufacturing Industry Purchases**

The greatest amount of supply chain purchases by metro region businesses were from the manufacturing industry. Yet, in-region manufacturing companies only supplied 16 percent of the sales made by this industry to the metro region. This includes 84 million dollars in purchases from the Cheese Manufacturing subindustry, 30 million dollars from the Paper (except Newsprint) Mills, and 20 million dollars from the other Aluminum Rolling, Drawing, and Extruding subindustry.

At the same time, metro region businesses bought 1.6 billion dollars from manufacturing businesses outside of the metro region for their supply chains. This included 140 million dollars from the Petroleum Refineries subindustry, 98 million from the Iron and Steel Mills and Ferroalloy Manufacturing subindustry, and 62 million from Paper Board Mills.

While the metro region is unlikely to become a hub for oil refineries or steel production in the near future, there may be other opportunities expand subindustries already in the region. For example, 59 million dollars in supplies were bought from sawmills not in the metro region, while only 2 million dollars in supplies were bought from sawmill industries in the region.

More data on industry purchases can be found in Appendix C. Subindustries with some purchases already made in the metro region and large amounts of imports would be a logical place to begin exploring opportunities for local businesses to supply other local businesses in the region, and therefore expand production. Further expansions of subindustries can be obtained from NCWRPC upon request.

### ***Industry Cluster Analysis and Cluster Key Strengths***

An industry cluster is a group of interconnected businesses that typically purchase supplies from one another, or benefit in some way from being in close proximity to one another, such as sharing similarly skilled labor pools. Clusters can foster innovation through collaboration or completion and lead to the development of supporting associations and institutions, or even specialized infrastructure which can reduce costs.

From an economic development strategy perspective, clusters are another tool used to understand the uniqueness and strengths of businesses already in a region, rather than trying to emulate another region's success. Identifying clusters in the region is the first step to organizing a strategy around a group of businesses, rather than one or two strong businesses. The concerns and needs of clusters can lead to more concrete strategies, such as targeting other supply chain businesses for startup or relocation or identifying labor training needs. One local example in the region, based on a similar concept, is the Heavy Metal Manufacturers group. This group meets regularly and has created strategies to educate local youth on future employment opportunities.

Industry clusters have been identified by algorithms created by several economic research institutions. The algorithms to identify clusters are based on a range of linkages including supply chains, shared labor occupation, and the proximity of business establishments.

EMSI uses the Purdue model of cluster identification to find businesses in the metro region that would fit into those clusters. It is not a perfect model, as there are some clusters identified in our region which only have one establishment. Nonetheless, there were 52 clusters identified in the metro region, out of a possible 70 clusters identified by the Purdue algorithms, which are listed in Appendix D.

The regional clusters were ranked based on five factors: the average earnings per job, local job growth, local job growth compared to the nation, the cluster's location quotient, and GRP. For the metro region study, each factor was weighted equally. The top 11 clusters and their subindustries are identified in Table 4.5. Production Technology and Heavy Machinery was the highest ranking cluster and is discussed below in greater detail.

**Table 4.5: Top Cluster Rankings**

<b>Production Technology and Heavy Machinery</b>		Score	72
NAICS	Industry	Jobs	Score
333120	Construction Machinery Manufacturing	122	35
333241	Food Product Machinery Manufacturing	183	45
333249	Other Industrial Machinery Manufacturing	243	41
333318	Other Commercial and Service Industry Machinery Manufacturing	251	46
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	1,083	100
333922	Conveyor and Conveying Equipment Manufacturing	27	32
333995	Fluid Power Cylinder and Actuator Manufacturing	181	40
336510	Railroad Rolling Stock Manufacturing	25	39
<b>Business Services</b>		Score	71
NAICS	Industry	Jobs	Score
485310	Taxi Service	49	24
541310	Architectural Services	52	32
541330	Engineering Services	357	43
541511	Custom Computer Programming Services	54	36
541512	Computer Systems Design Services	108	32
541611	Administrative Management and General Management Consulting Services	119	37
541990	All Other Professional, Scientific, and Technical Services	10	21
551114	Corporate, Subsidiary, and Regional Managing Offices	1,451	88
<b>Electric Power Generation and Transmission</b>		Score	65
NAICS	Industry	Jobs	Score
221112	Fossil Fuel Electric Power Generation	303	65
<b>Local Education and Training</b>		Score	60
NAICS	Industry	Jobs	Score
611110	Elementary and Secondary Schools	17	22
611610	Fine Arts Schools	25	23
624310	Vocational Rehabilitation Services	75	27
903611	Elementary and Secondary Schools (Local Government)	2,782	62
<b>Upstream Chemical Products</b>		Score	59
NAICS	Industry	Jobs	Score
325194	Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing	53	59
<b>Downstream Metal Products</b>		Score	58
NAICS	Industry	Jobs	Score
332312	Fabricated Structural Metal Manufacturing	403	55
332321	Metal Window and Door Manufacturing	1,058	65
332439	Other Metal Container Manufacturing	113	46
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	371	46
<b>Food Processing and Manufacturing</b>		Score	58

NAICS	Industry	Jobs	Score
311119	Other Animal Food Manufacturing	13	33
311513	Cheese Manufacturing	631	60
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	109	47
<b>Local Government Services</b>		<b>Score</b>	<b>58</b>
NAICS	Industry	Jobs	Score
903999	Local Government, Excluding Education and Hospitals	2,248	58
<b>Insurance Services</b>		<b>Score</b>	<b>55</b>
NAICS	Industry	Jobs	Score
524114	Direct Health and Medical Insurance Carriers	432	27
524126	Direct Property and Casualty Insurance Carriers	1,807	61
<b>Nonmetal Mining</b>		<b>Score</b>	<b>51</b>
NAICS	Industry	Jobs	Score
212311	Dimension Stone Mining and Quarrying	27	51
<b>Local Food and Beverage Processing and Distribution</b>		<b>Score</b>	<b>50</b>
NAICS	Industry	Jobs	Score
311811	Retail Bakeries	50	25
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	1,190	84
424490	Other Grocery and Related Products Merchant Wholesalers	329	35
424810	Beer and Ale Merchant Wholesalers	114	26
445110	Supermarkets and Other Grocery (except Convenience) Stores	902	19
445210	Meat Markets	62	28
445291	Baked Goods Stores	39	28
445299	All Other Specialty Food Stores	11	20
454210	Vending Machine Operators	12	24
454390	Other Direct Selling Establishments	57	26

Source: EMSI 2016

*Production Technology and Heavy Machinery Cluster*

The highest ranking cluster was the Production Technology and Heavy Machinery Cluster, which scored high in each of the five qualities used to rank the clusters: regional job growth, competitive job growth, GRP, Regional specialization, and earnings per worker. The Production Technology and Heavy Machinery Cluster did well in each of the five categories. The average earnings per job were \$71,000 in 2016. From 2006 to 2016, this cluster experienced a 12.6 percent increase in jobs, compared to a 6.6 percent decrease for the nation. The projected growth is 19.9 percent in the metro region from 2016 to 2026, compared to 5.5 percent for the nation. As for regional specialization, there were 2,115 jobs in the metro region, which was 1,484 percent above the national averages. The cluster had a gross regional product of 211 million dollars, or 4.2 percent of the metro region GRP.

Within the county, there were 16 payrolled locations in 2015 in this cluster and eight different subindustries, as displayed in Table 4.6. Businesses in the metro region include the Greenheck Fan Corporation, Industrial Service & Machine, Inc., Roland Machinery Company, and

Hayseensandiacre. The Greenheck Fan Corporation is a part of the Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing subindustry. Founded in 1947, it has several locations in Schofield, including development and testing facilities. It is a leading supplier of air movement and control equipment that includes fans, dampers, louvers, kitchen ventilation hoods, and energy recovery and make-up air unit.

**Table 4.6: Production Technology and Heavy Machinery Cluster Subindustries**

NAICS	Description	2016 Jobs	2016 LQ	2026 LQ	2014 GRP
333120	Construction Machinery Manufacturing	122	4.22	0.32	\$12,284,149
333241	Food Product Machinery Manufacturing	183	23.32	10.41	\$19,028,072
333249	Other Industrial Machinery Manufacturing	243	9.96	12.09	\$16,400,232
333318	Other Commercial and Service Industry Machinery Manufacturing	251	9.66	18.10	\$14,263,362
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	1,083	84.65	101.75	\$132,393,302
333922	Conveyor and Conveying Equipment Manufacturing	27	2.05	2.85	\$2,498,785
333995	Fluid Power Cylinder and Actuator Manufacturing	181	23.94	22.85	\$14,289,843
336510	Railroad Rolling Stock Manufacturing	25	1.95	0.12	\$119,840
Total:		2,115	-	-	-
Source: EMSI, 2016					

*Production Technology and Heavy Machinery Cluster: Business recruitment*

Like most of the clusters in the metro region, the metro region is competitive in terms of jobs in the Production Technology and Heavy Machinery Cluster because the average earnings per job are lower than other regions. What makes attracting more businesses in this cluster desirable to the metro region is that these jobs have average earnings that are higher than the metro region’s average earnings per job. Attracting more businesses in this cluster to the metro region effectively would raise the quality of life.

For example, the New York-Newark-Jersey City, NY-NJ-PA Metropolitan Statistical Area (MSA) had 239 payrolled business locations in 2015 in this cluster but lost 28 of these locations during the past five years. High payrolled business location losses indicate that these businesses are discontented with that particular region and are willing to relocate. The New York-Newark-Jersey City, NY-NJ-PA MSA had average earnings of \$94,939 per job, possibly making the Wausau statistical region an attractive option for these businesses due to reduced labor costs (\$71,421 average earnings per job).

In the Minneapolis-St. Paul-Bloomington, MN-WI MSA, there were 131 payrolled locations and there were 10 payrolled business locations lost. Labor costs in the metro region were 76 percent of costs in this MSA. The top businesses in the Minneapolis-St. Paul-Bloomington, MN-WI MSA

included Donaldson Company, GE Water & Process Tech, Proto Labs Inc, Loram Maintenance of Way Inc., Film Tec Corp, Daikin Applied America, Amano McGann Inc., Gea Processing, and Tolomatic Inc.

*Production Technology and Heavy Machinery Cluster: Workforce Availability*

This cluster employs workers from 45 different occupations—from welders, office clerks, engineers, managers and janitors. The metro region has a higher concentration of these jobs in this cluster compared to the nation with a 1.42 location quotient for the cluster. The occupations within this cluster experienced 9.0 percent job growth between 2011 and 2016, which is an indicator that the regional talent pool is increasing.

The cluster analysis identified ten key occupations in this cluster: Welders, Cutters, Solderers, and Brazers; First-line supervisors of Production and Operating Workers; Team Assemblers; Machinists; Welding, Soldering and Brazing Machine Setters, Operators, and Tenders; Mechanical Engineers; Laborers and Freight, Stock, and Material Movers, Hand; Inspectors, Testers, Sorters, Samplers, and Weighers; Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products; and General and Operations Managers.

Over 63 percent of the jobs in this cluster usually require a high school education, and about ten percent typically do not require any formal education, according to occupational data on EMSI. However, it is likely that many of the jobs here do require a post-secondary education certificate, apprenticeship, or on the job training. The cluster employed roughly 70 engineers in various fields, including mechanical, industrial, and electrical.

*Production Technology and Heavy Machinery Cluster: Supply Chain Requirements*

The cluster had 254 million dollars in production supplies and services. 15 percent of this supply chain was met in-region. Six subindustries within the metro region each supply over 1 million dollars in supplies: Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing (\$4.9 million); Motor and Generator Manufacturing (\$1.8 million); Fabricated Structural Metal Manufacturing (\$1.8 million); Corporate, Subsidiary, and Regional Managing Offices(\$1.4 million); Industrial Machinery and Equipment Merchant Wholesalers (\$1.1 million); Other Motor Vehicle Parts Manufacturing (\$1.1 million); and Metal Window and Door Manufacturing (\$1.1 million).

The ten largest imported purchases for the cluster come from the subindustries listed in Table 4.7. Some of the subindustries listed here have no business locations in the area but it is possible that an argument could be made to attract these industries. Another strategy may be to expand the existing businesses that are already contributing to the supply chain.

Table 4.7 Top Cluster Import Purchases

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
331420	Copper Rolling, Drawing, Extruding, and Alloying	\$0	0.0%	\$17,610,645	100.0%	\$17,610,645
331110	Iron and Steel Mills and Ferroalloy Manufacturing	\$0	0.0%	\$13,148,028	100.0%	\$13,148,028
551114	Corporate, Subsidiary, and Regional Managing Offices	\$1,383,399	9.5%	\$13,133,924	90.5%	\$14,517,323
425120	Wholesale Trade Agents and Brokers	\$486,881	7.7%	\$5,836,253	92.3%	\$6,323,135
332710	Machine Shops	\$397,608	7.2%	\$5,121,098	92.8%	\$5,518,706
324110	Petroleum Refineries	\$0	0.0%	\$4,558,691	100.0%	\$4,558,691
335312	Motor and Generator Manufacturing	\$1,838,912	30.3%	\$4,238,706	69.7%	\$6,077,618
325510	Paint and Coating Manufacturing	\$450,456	10.2%	\$3,964,493	89.8%	\$4,414,949
333912	Air and Gas Compressor Manufacturing	\$41,878	1.2%	\$3,592,413	98.8%	\$3,634,292
313210	Broadwoven Fabric Mills	\$0	0.0%	\$3,047,345	100.0%	\$3,047,345

Source: EMSI, 2016

The subindustries in Table 4.8 already exist in the metro region and supply this cluster with at least \$500,000 worth of materials and services. At the same time the cluster purchases at least \$1,000,000 from the same subindustries outside of the metro region. Upon further investigation these subindustries could possibly have the potential to increase their share of this cluster’s supply chain. Furthermore, many of these subindustries are in the metro region’s top clusters.

Table 4.8: In Region Cluster Supply Chain

NAICS	Subindustry	In-Region Supplies Met	Imported
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	\$4,932,201	\$2,020,888
335312	Motor and Generator Manufacturing	\$1,838,912	\$4,238,706
332312	Fabricated Structural Metal Manufacturing	\$1,757,458	\$999,737
551114	Corporate, Subsidiary, and Regional Managing Offices	\$1,383,399	\$13,133,924
332322	Sheet Metal Work Manufacturing	\$629,452	\$1,602,133
336390	Other Motor Vehicle Parts Manufacturing	\$1,073,535	\$1,405,552

Source: EMSI, 2016

### Crucial Regional Clusters

The next section explores several other regional clusters. These clusters were selected not based on their cluster ranking scores, but due to the number of cluster establishments in the region, the cluster’s total number of jobs, regional growth, multiplier effects, and the potential to identify supply chain gaps. Looking into the supply chains of the Local Government Services cluster or the Local Educational institution, which were ranked as top clusters, would likely be unproductive to identifying possible economic strategies even though they are important to the overall economy. Furthermore, some of the top ranking clusters only had one establishment identified in the metro region. As the purpose of cluster analysis is to move away from single business strategies to business group strategies, examining these single-business clusters would be less productive.



*Business Services Cluster*

Subindustries:

*Corporate, Subsidiary, and Regional Managing Offices*

*Engineering Services*

*Administrative Management and General Management Consulting Services*

*Custom Computer Programming Services*

*Architectural Services*

*Taxi Service*

*All Other Profession, Scientific, and Technical Services*

This cluster was the second highest scoring cluster. From 2006 to 2016 the number of jobs increased from 1,250 to 2,201, an increase of 76.1 percent, compared to 35.4 percent for the nation. However, this cluster is not highly concentrated with an average of 13 percent fewer jobs in this cluster than the nation. The cluster had a GRP of 146 million dollars in 2014. Nonetheless, 82 percent of the regional demand for the services that this cluster provides is met from outside of the region.

There were 91 payrolled business locations in the county for this cluster in eight different subindustries. The cluster employs software developers, office clerks, general and operations managers, customer service representatives, and bookkeeping, accounting, and audition clerks. Businesses included Human Service Center, Wausau Financial Systems, Inc., All American Taxi, Becher-Hoppe Associates, Inc., and Central Wisconsin Engineers. Wausau Financial Systems, Inc, for example, provides payment and receivables processing solutions.

*Downstream Metal Products Cluster*

Subindustries:

*Metal Window and Door Manufacturing*

*Fabricated Structural Metal Manufacturing*

*All Other Miscellaneous Fabricated Metal Product Manufacturing*

*Other Metal Container Manufacturing*

There were 2,000 jobs in this cluster in 2016, which was 1,806 percent above the national average. The average earnings per job were \$62,000 dollars. Over the past ten years, the number of jobs in this sector has increased 21.0 percent, while the nation declined 16.5 percent. Jobs are projected to grow 9.5 percent in this cluster over the next ten years.

There were 21 payrolled business locations in Marathon County. This included Wausau Window & Wall Systems, Sterling Building Systems, and Schuette Metals Inc. Founded in 1956, Wausau Window and Wall Systems engineers commercial window and curtain wall systems. Downstream Metal Products is also linked to the Production Technology Cluster.



*Food Processing and Manufacturing Cluster*

Subindustries:

*Cheese Manufacturing*

*Dry, condensed, and Evaporated Dairy Product Manufacturing*

*Other Animal Food Manufacturing*

The Food Processing and Manufacturing cluster is made up of three subindustries: Cheese Manufacturing; Dry, Condensed, and Evaporated Dairy Product Manufacturing; and Other Animal Food Manufacturing. The cluster employed 750 people and 12 payrolled locations in the county. This included the Marathon Cheese Corporation, Kraft Foods, Foremost Farms USA, Bletsoe's Cheese Inc. and Heartfelt Cooperative Services. Founded in 1952, Marathon Cheese Corporation is located in Marathon City, and manufactures cheese packaging products for cheese slices, chunks, shreds, waxed items and custom packaging solutions.

This cluster employs 753 workers, which is 1,723 percent above the national average. From 2006 to 2016, jobs increased by 10.4 percent, which was lower than the national growth rate of 15.5 percent. Earnings were \$70,811 per job in 2016 while the GRP was 83 million dollars.

This cluster purchased over 687 million dollars in supplies and services for production. 161 million dollars' worth was purchased in-region. Some of the largest purchases came from Cheese Manufacturing and Dry, Condensed, and Evaporated Dairy Product Manufacturing, which are part of the cluster. 48 million dollars of supplies were purchased from establishments outside of the region in these subindustries.

Also of note is that the Food Processing and Manufacturing cluster is connected to the Biopharma cluster, another (average) cluster in the metro region. This includes Dietary Pro Labs, which is a dietary supplements contract manufacturer in Wausau and Pura Med Bio Science Inc., which focuses on developing and marketing non-prescription medicinal and healthcare products, including migraine medication.

*Insurance Cluster*

Subindustries:

*Direct Property and Casualty Insurance Carriers*

*Direct Health and Medical Insurance Carriers*

The Insurance Services Cluster had 2,240 jobs in 2016 in the metro region. It scored well in regional specialization, 501 percent more jobs than the national average. However, the cluster did not score well on jobs growth or regional competitiveness. From 2006 to 2016, the cluster jobs decreased 31.3 percent while the nation increased 3.0 percent. The cluster is projected to lose roughly 500 jobs over the next ten years. The cluster had 424 million in GRP.

There were 15 payrolled business locations in the county in 2016. This cluster employed roughly 300 insurance claims and policy processing clerks, 300 customer service representatives, 100 claims adjusters, examiners, and investigators, and 100 software developers.

*Paper and Packaging Cluster*

Subindustries:

*Paper (except Newsprint) Mills*

*Corrugated and Solid Fiber Box Manufacturing*

*Folding Paperboard Box Manufacturing*

*Paper Bag and Coated and Treated Paper Manufacturing*

*All Other Converted Paper Product Manufacturing*

In 2016, there were 1,407 jobs in this cluster. This is 1,160 percent above the national average. Since 2006, the cluster lost over 600 jobs and the cluster is projected to lose another 400 jobs by 2016. The average earnings per job were \$78,000 and contributed 200 billion dollars to the GRP. The decline of this industry is troubling, as the cluster has a jobs multiplier effect of 2. This means that for every job added to this cluster, a total of one other job in the local economy is supported.

There were a total of nine payrolled establishments in this cluster in 2015. This included the Wausau Paper Corp., Domtar Paper Company, Expera Specialty Solutions, Wausau Coated Products, and Green Bay Packaging Inc. Located in Rothschild, the Domtar Paper Company has an annual paper production capacity of 131,000 short tons. The mill was originally opened in 1909 and is a legacy of the Wausau Group. It became a part of Domtar in 2007.

The cluster purchased over 500 million dollars in supplies and services in 2016. Sixteen percent of purchases were in-region. Some of the largest in-region purchases were from within the subindustry cluster, as well as Corporate, Subsidiary, and Regional Managing Companies, Fossil Fuel Electric Power Generation, Engineering Services, Industrial Machinery and Equipment Merchant Wholesales, and Metal Coating, Engraving, and Allied Service. The other 84 percent of the supply chain is purchased from subindustries outside of the region. Some the largest subindustry suppliers to this cluster is Paperboard Mills, Pulp Mills, Paper (except Newsprint) Mills, Sawmills, Paper Bag and Coated and Treated Paper Manufacturing, and Corrugated and Solid Fiber Box Manufacturing.

*Wood Products Cluster*

Subindustries:

*Other Millwork (including Flooring)*

*Prefabricated Wood Building Manufacturing*

*All Other Miscellaneous Wood Product Manufacturing*

*Wood Window and Door Manufacturing*

*Sawmills*

*Wood Container and Pallet Manufacturing*

The Wood Products Cluster was not a top cluster in the region despite its history in the region and its status as a major employer. This was mainly due to local growth and regional competitiveness. The cluster employed 1,902 workers in the metro region in 2016. This was 1,546 percent more jobs than the national average. However, from 2006 to 2016, this cluster lost 1,575 jobs, a decrease of over 45 percent. By comparison, the national jobs declined by nearly 26 percent. From 2016 to 2026, the cluster is projected to lose another 950 jobs.

In Marathon County, there were 29 payrolled locations in 2016. This includes Kolbe & Kolbe Millwork Company Inc., Menzer Lumber & Supply Company, Imperial Industries Inc., MBX Packaging Specialists, and American Wood Fibers. Kolbe & Kolbe Millwork Company Inc. is located in Wausau and was founded in 1946. The company offers an extensive line of wood, aluminum clad and vinyl windows and doors.

The cluster purchased over 246 million dollars in supplies and services in 2016. Twenty percent of purchases were in-region. Some of the largest purchases were within the subindustry cluster, as well as Metal Window and Door Manufacturing and Hardware Manufacturing. The other eighty percent of the supply chain is purchased from subindustries outside of the region. Some of the largest subindustry suppliers to this cluster were Sawmills, Wood Preservation, Truss Manufacturing, Machine Shops, sheet Metal Work Manufacturing, Reconstituted Wood Product Manufacturing, Cut Stock, Resawing Lumber, and Planing, and Unlaminated Plastics Film and Sheet subindustries.

#### *Local Health Services Cluster*

Lastly, the Local Health Services Cluster was not a top cluster either, which was mainly due to low regional specialization. While there were 26 subindustries in this cluster located in the metro region and 267 payrolled business locations in 2015, the number of jobs in this cluster was only 15 percent above the national average and only 2 percent above average for the county. While healthcare is the second largest employer in the region, with 7,915 jobs in 2016, regional specialization is relatively low due to the high growth of this industry around the county. Nonetheless, the region will grow faster than the nation over the next ten years, with jobs increasing over 26 percent, compared to 18 percent for the nation. Top regional businesses included Aspirus Wausau Hospital, St. Claire's Ministry Hospital, Marshfield Clinic, and Mountain View Care Center.

#### *Local Financial Services*

Subindustries:

*Third Party Administration of Insurance and Pension Funds*

*Commercial Banking*

*Credit Unions*

*Insurance Agencies and Brokerages*

In 2016, there were 1,210 jobs in this cluster. From 2006 to 2016, the cluster experienced a 40 percent increase in jobs, compared to 7 percent for the nation. Over the next ten years, the

cluster is expected to grow another 37 percent. The average earnings per job was \$64,189 in 2016, which was below the national average. However, this cluster had a relatively low concentration of jobs, 12 percent more than the national averages, with accounts for its score as an average cluster.

The county had 166 payrolled locations for this cluster in 2016. This included Wisconsin Physician Services (WPS Health Insurance), Nationwide Indemnity, the Peoples State Bank and American Family Insurance.

#### *Financial Services*

Subindustries:

*Securities Brokerage*

*Consumer Lending*

*Sales Financing*

*All Other Non-depository Credit Intermediation*

*Investment Advice*

*Saving Institutions*

From 2006 to 2016, this cluster lost 49 jobs, decreasing 13 percent, compared to the nation which had a 6 percent decrease. In 2016, there were 341 jobs in this cluster which was 12 percent below the national average. This sector is expected to add 133 jobs over the next ten years, increasing 39 percent. The average earnings per job were \$66,710, which was well below the national average.

There were 43 payrolled locations in the county in 2016, including Aqua Finance Incorporated, UBS Financial Services, United FCS, Midwest Professional Planners, BMO Private Bank. Aqua Finance provides financing to a variety of different industries including water, home improvement, and HVAC.

### **Key Trends Based on Economic Assessment**

#### **Metro Region as a Job Center**

Since the early 1900s, the metro area has been a manufacturing and business services hub. In the 1970s, the population swelled as the metro region offered many job opportunities. Today, the area continues to be a job center. There are 28 percent more jobs than there are metro region residents in the labor force. However, with major road improvements the labor shed to the metro area is large, with workers traveling far distances to reach their jobs. The result of this means that the metro region can not only look inside its own boundaries or even limit itself to the county when pursuing educational and training strategies.

## **Manufacturing Industries Transitioning**

Manufacturing is and will continue to be a major employer in the metro region. However, there will be turbulence as the industry transitions. Wood Product Manufacturing, particularly paper mill and paperboard mills are expected to struggle, along with Electrical Equipment Manufacturing and Motor Vehicle Part Manufacturing. At the same time, machinery manufacturing, particularly the Commercial and Service Industry Machine Manufacturing subindustry and the Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing subindustry, along with the Fabricated Metal Product Manufacturing subindustry, are expected to grow.

The manufacturing industry is expected to lose over 500 jobs. However, of the 22,000 job openings expected in the metro region over the next ten years, 5,000 of those openings will be for occupations associated with the manufacturing industry. With the region's largest share of workers 55 years and older, many of the manufacturing industry's openings will be the result of retirements. Unfortunately the number of jobs lost with retirements could not be tabulated and we are unable to know how many workers will need to be retrained with the loss of jobs.

Another concern for the manufacturing industry is that the openings that the industry will have over the next ten years are not the well-paying positions that America has come to associate with manufacturing. For example, over 34 percent of the occupations associated with the manufacturing industry pay less than a living wage, or \$15.78 which is the living wage for two working adults with two children. Over the next ten years, the greatest number (85 jobs) of Technology Production and Machinery cluster jobs added will be team assemblers, who have median hourly earnings of \$13.69 dollars per hour.

## **Health Care and Social Assistance Industry Growing**

The Health Care and Social Assistance Industry added over 9,000 jobs in the metro region since 2001. This was the most jobs added to an industry overall. The location quotient of this industry will remain low as the health care industry grows rapidly due to the aging population across the country. However, the growth in this industry is not limited to a few subindustries and is quite diversified. Furthermore, the industry had an average annual earnings of \$66,493 which is \$12,745 dollars more than the metro region average earnings. This industry will continue to grow for the near future, as the aging of the Baby Boomer ages and requires more medical attention.

## **Lower Wages**

The average annual earnings in the metro region were \$53,700 which was considerably less than the Wisconsin average of \$57,400 and the national average of \$65,200. This can be a strategic advantage for the region. The low cost of labor could potentially lure businesses into the area. By selectively recruiting and expanding industries and subindustries with above average earnings, the metro region could raise its quality of life not only for workers in those industries, but for the employees who provide residential services for these workers.

### Labor Force Attraction and Retention

Over the next ten years, there will be 22,000 job openings in the metro region, due to new jobs, retirements, and career transitions. Many of these openings are in the service industry and 53 percent have occupation median hourly wages less than the living wage of \$15.78. Presumably, this will be similar to communities across Wisconsin; however, as noted in chapter 3, several of the surrounding counties have higher wages when compared to Marathon County. It will presumably be harder to fill these positions as the labor shortage grows and workers can demand a higher wage in other fields.

One of the issues that was raised at a metro group meeting was the mismatch of goals between the priorities of municipalities and existing businesses. Municipalities expand their tax base by attracting new businesses. Additionally residents benefit from an expanded job market. However, as anecdotal evidence suggests, local businesses are already having difficulty hiring workers and retaining them. A lack of a readily available workforce could lead to the relocation of metro region establishments. This issue should be examined further in the second step of this process, a regional economic development strategy, to see if this conflict of interests could be remedied or lessened.

## Chapter 5: Infrastructure and Transportation

Adequate public and private infrastructure and transportation systems are essential for community businesses to grow and thrive. These structures and facilities include the transportation network or roads, rail and other means of moving people and goods, as well as the public and private utility systems for water and sewer, power, and telecommunications. The availability of industrial and business park space as well as sites for redevelopment are also identified in this chapter.

### Highway Network

#### *USH51/STH 29*

The Metro Region is conveniently located on USH 51/STH 29 which provides interstate access to the south (I-39) and northern access to Merrill via USH 51 expressway. STH 29 provides convenient expressway access to the east to Green Bay and west to Eau Claire and the Twin Cities. All of these roads that make up the freeway system through the Wausau area are classified as principal arterials.

#### *USH 51/I-39*

USH 51/39 is designed as a freeway through Marathon County. I-39 South provides access to I-94 East, connecting the Wausau area to the Madison, Milwaukee, and Chicago metropolitan areas and beyond.

#### *Business 51*

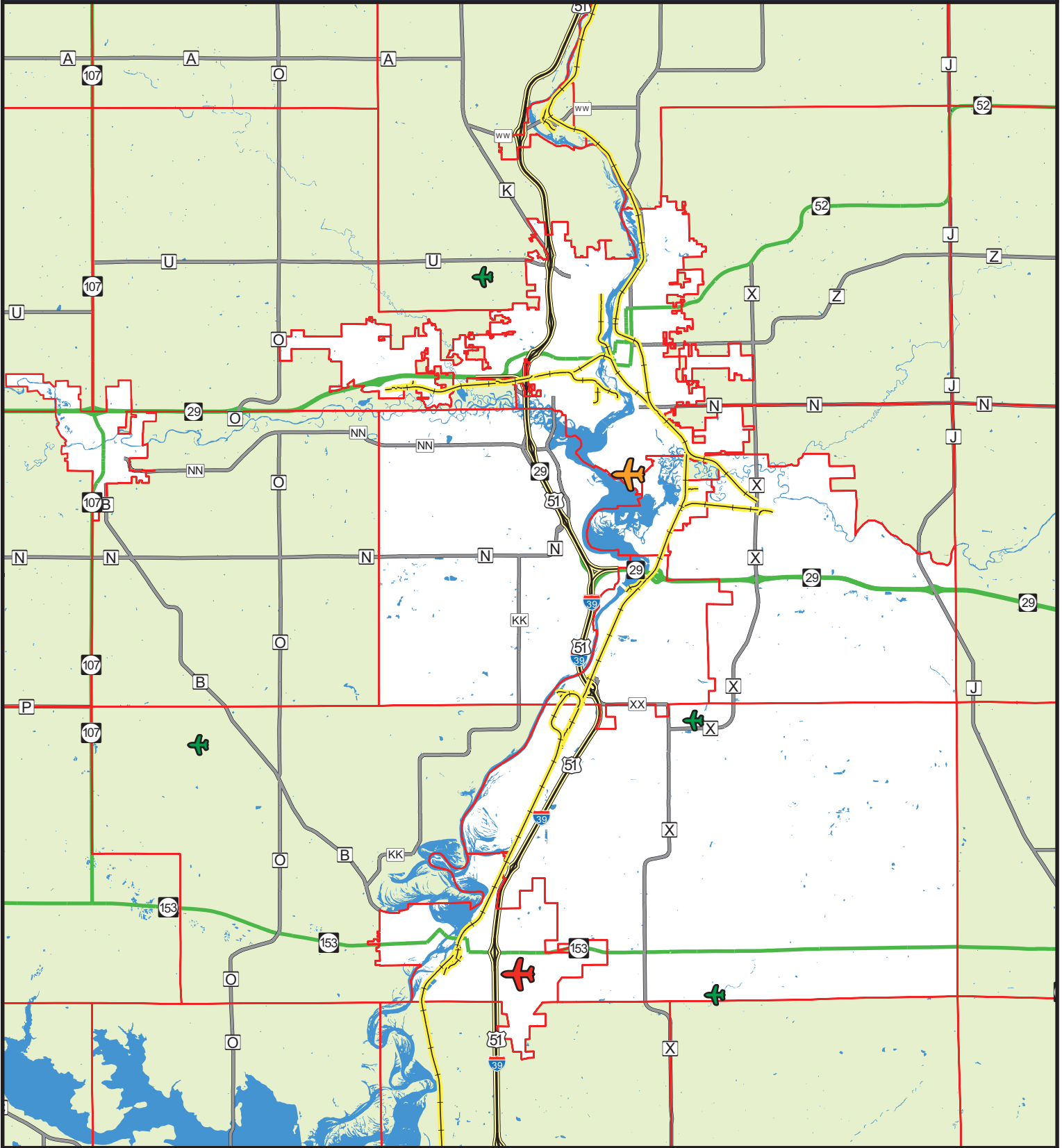
Business 51 is also a principal arterial providing north and south access through Wausau. Before the construction of new USH 51, Business 51 was the main highway through the metropolitan area. Business 51 still serves as a major north-south route.

#### *STH 52*

STH 52 is also a principal arterial. From west to east, STH 52 starts at the USH 51/STH 29 interchange, follows Stewart Avenue across the river via the one-way pair of Washington Street (eastbound) or Scott Street (westbound).

#### *Roadway Improvements*

A major effort by the state is underway, which seeks to upgrade State Highway 29 to a freeway beyond the Metro Region. The Wisconsin Department of Transportation is currently designing and conducting environmental studies to preserve right-of-way and functionality. This includes plans for future interchanges, overpasses and local road modifications. The purpose of this is to maintain a safe and efficient state highway as a part of the State Highway network.



- Minor Civil Divisions
- US Highway
- State Highways
- County Highways
- Railroad
- Water
- ✈ Commercial Service
- ✈ Large General Aviation
- ✈ Grass Strip (Private)





## Air Service

The metro region is home to two major airports, the Central Wisconsin Airport (CWA) in Mosinee and the Wausau Municipal Airport located in Wausau.

The Central Wisconsin Airport is an Air Carrier/Air Cargo class airport, meaning that it is designed to accommodate virtually all aircraft up to, and in some cases including, wide body jets and large military transports. The airport is one of nine airports in Wisconsin that provide schedule commercial air passenger service on a year-round basis and Delta, United, and American Airlines provide 14 flights per day with connections to Minneapolis, Chicago, and Detroit. The airport is accessible on I-39. There are two concrete runways, five instrumental landing procedures for all weather operations, an air traffic control tower, and all the other amenities of a modern airport.

The Wausau Municipal Airport is a local, private airport located in the City of Wausau. It provides general aviation services and is fully equipped to receive large corporate jets, charters, and privately owned aircraft. US 51/Grand Avenue is the primary access route to the airport. The airport has two paved runways and instrumental approaches. Air charter, flight instruction, aircraft rental, scenic rides, as well as aviation line services such as refueling, transportation, lodging and catering are some of the services available.

## Freight Rail

Marathon County has about 65 miles of active rail lines. The primary rail operators in Marathon County are Canadian National (CN) railroad and Union Pacific railroad. The only active rail line through the metro region runs along the Wisconsin River and I-39/USH 51 corridor through Marathon County. The tracks are owned and operated by the CN railroad.

## Available Business Parks/Space

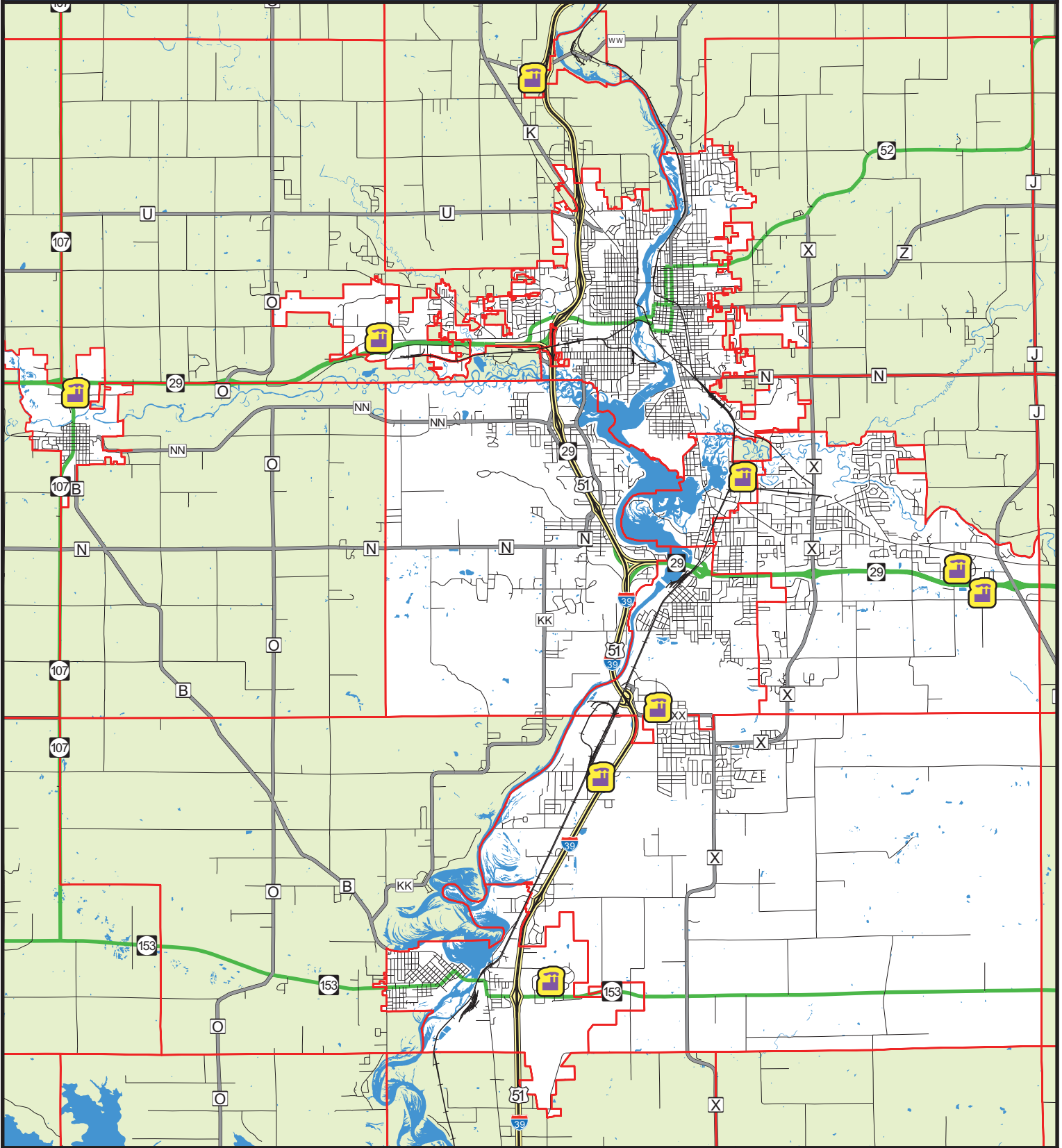
There are 5 industrial and business parks located in Wausau, Mosinee, Kronenwetter, Rothschild, and Weston. These are located along the Highway 51 and Highway 29 Corridors.

See Map 4: Metro Region Business & Industrial Parks.

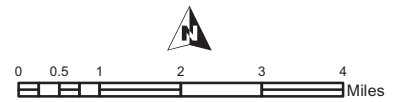
## Services (Sewer/Water, Electrical, Broadband)

### *Sewer*

The cities of Mosinee, Schofield, and Wausau as well as the villages of Kronenwetter, Rothschild, and Weston are a part of the Wausau Area Sewer Service Area, which is currently being updated. The sewer service area also extends beyond the principal communities in this study in some cases but does not reach every property within the metro region due to environmental concerns in rural Rothschild, Kronenwetter, and Rib Mountain.



- Minor Civil Divisions
  - US Highway
  - State Highways
  - County Highways
  - Local Roads
  - Railroad
  - Water
-  Industrial Park



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Wisconsin Regional  
Planning Commission

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In the Metro region, wastewater treatment facilities appear to be in good repair, with adequate capacity to serve expected development within their respective areas. Local wastewater collection systems (pipe network and lift stations) are also generally in good condition, as of 2009. Sewer pipes and mains are typically replaced and upgraded in conjunction with road reconstruction or in response to known problems.

Village of Marathon City sewer service area encompasses the area within the Village boundaries as well. The Marathon City wastewater treatment facility was rebuilt in 1999 and had ample capacity to serve anticipated future development in the service area as of 2006. The wastewater collection system is generally in good condition, although some pipes are very old.

### *Water*

All of the municipalities in the Metro regions provide public water service within their boundaries and occasionally slightly beyond. Multiple wells are needed to meet the demand for water in most communities, and existing wells sufficiently meet current needs. Groundwater is plentiful beneath most of Marathon County.

The Village of Marathon City distributes water to properties within its municipal boundary. The Village currently has three wells with adequate capacity to meet the needs of existing and anticipated development. The Village's water distribution system is in good working condition.

### *Energy*

Most electricity in Wisconsin is produced by coal-fired and nuclear powered generating plants, although several newer power plants are fueled by natural gas. The Wisconsin Public Service Corporation (WPS) is the primary supplier of electric power in Marathon County, as well as natural gas. WPS is based in Green Bay and serves nearly the entire County. WPS currently operates three power plants all located in the villages of Kronenwetter and Rothschild. These plants provide up to 896 megawatts of coal-fire capacity. Weston 4, which began operating in 2008 uses clean coal technology, and is one of the cleanest power plants of its kind in the country.

### *Telecommunications and Broadband*

Private companies; such as T-Mobile, Verizon, AT&T, Cellcom, TDS, and Charter; provide telecommunication services in Marathon County. The currently available means of connecting to the internet are via cable modem, digital subscriber line (DSL), fixed wireless service, mobile or cellular wireless, and satellite-based internet service. These options provide a range of services and costs to residents and businesses but are not all available in every part of the county. The Broadband Gap Analysis 2009 study identified several means of increasing internet access and speed in the future including fourth generation (4G) technologies like Long Term Evolution (LTC) and Worldwide Interoperability for Microwave Access (WiMAX), broadband over power line

(BPL), and fiber to the home or premise. The cost of these options is often a limiting factor in implementation.

Broadband coverage is available in both fixed and mobile types. Fixed broadband includes all wireline and fixed wireless technologies. Fixed broadband at speeds greater 25 mbps can be found in and near the metro region. Mobile broadband service is typically used via smartphones. Mobile broadband coverage in Marathon County has slower download speeds than fixed, with most of the County at speeds of 768 kbps to 10mbps.

## Chapter 6: Economic Development Goals

As part of the assessment process the local community comprehensive plans were reviewed to identify existing economic development goals among the different communities. These goals were examined and then categorized into “themes” to lay the foundation for potential regional goals. In all, eleven themes were identified which could serve as the starting point for goals and objectives for the regional economic strategy. The chapter concludes with the beginning of the regional economic development framework.

### Theme A: Diversify the Local Economy

Seven communities had goals or objectives that were categorized as “diversify the local economy”. These goals and objectives ranged from maintaining goods and services in the downtown areas, to bringing in more commercial and industrial businesses suited to the needs and desires of the community, to increasing tourism.

**Table 6.1: Diversify the Local Economy**

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Marathon City	Goal	2005	Diversify the local economy
Mosinee	Goal	2006	Diversify the local economy
Rib Mountain	Goal	2005	Maintain a diverse mix of goods and services that serve the Town and the surrounding region.
Rothschild	Objective 1.1	2006, 2016	To diversify the local economy to create a more regional employment and market base.
Kronenwetter	Objective 1.2	2009	Commercial establishments that are desired by the community and which will improve the quality of life of Village residents will be prioritized.
Weston	Objective 1.3	2016	Increase the number of retailers, restaurants, and service providers within the village.
Weston	Objective 1.4	2016	Increase visitors and tourists to the village.
Wausau	Objective 1.9	2005	Support economic revitalization of downtown by encouraging diverse economic activity, including government and professional offices; insurance and financial services; convention, lodging, food/beverage, and entertainment; education and training; retail trade; and high-density residential uses.
Rib Mountain	Objective 2.2	2005	To proactively identify the type and amount of commercial development needed in Rib Mountain to serve local needs.
Weston	Objective 2.2	2006	To work with developers and/or conduct a market study to determine what retail and commercial businesses might be suitable for the Village.

### Theme B: Revitalize Older Industrial and Commercial Areas

Five communities specifically sought to revitalize older industrial and commercial areas. This included the attraction of new businesses to declining areas as well as increasing aesthetic appeal and infrastructure improvements.

**Table 6.2: Revitalize Older Industrial and Commercial Areas**

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Rib Mountain	Goal	2005	Revitalize older industrial and commercial areas
Mosinee	Goal	2005	Revitalize older industrial and commercial areas

Rothschild	Goal	2006, 2016	Revitalize older industrial and commercial areas
Schofield	Goal	2006	Encourage revitalization of older commercial areas
Mosinee	Objective 1.1	2006	To identify under-utilized commercial and/or industrial properties in the City and encourage their revitalization (i.e., along Old Highway 51).
Rib Mountain	Objective 1.1	2005	To identify commercial and/or industrial properties that should be targeted for redevelopment.
Schofield	Objective 1.2	2006	To encourage redevelopment and enhancements to existing businesses in the industrial park.
Mosinee	Objective 1.3	2006	To ensure that public infrastructure (water, sewer, roads/access) is adequate to support redevelopment of existing commercial and industrial properties.
Weston	Objective 1.3	2006	To ensure that public infrastructure (e.g., water, sewer, roads/access) is adequate to support redevelopment of existing commercial and industrial properties.
Rothschild	Objective 2.1	2006, 2016	To encourage redevelopment of older commercial areas.
Schofield	Objective 2.1	2006	To identify under-utilized commercial properties that could benefit from redevelopment, such as the mobile home park on Business 51.
Rothschild	Objective 2.2	2006, 2016	To identify under-utilized commercial and/or industrial properties that could benefit from revitalization.
Schofield	Objective 2.2	2006	To encourage existing business and new development along Business 51 to make site improvements to take advantage of their waterfront locations along the Wisconsin River and/or Eau Claire flowage.
Rothschild	Objective 2.3	2006, 2016	To ensure that public infrastructure (water, sewer, roads/access) is adequate to support redevelopment of existing commercial and industrial properties.
Schofield	Objective 2.3	2006	To encourage access management and aesthetic improvements along Business 51.
Wausau	Objective 1.10	2005	Identify issues and opportunities facing key industry groups and take actions to enable them to continue operation and to expand in the City of Wausau

### Theme C: Support Local Industrial Development

Four communities prioritized the growth of the manufacturing industry in their boundaries. This included revitalization with improvement infrastructure and the attraction of new businesses.

Table 6.3: Support Local Industrial Development

Community	Level	Year	Text
Weston 2006	Goal	2006	Strengthen the viability of the local manufacturing economy
Schofield	Goal	2006	Support local industrial development
Rothschild 2006, 2016	Goal 2	2006, 2016	Revitalize older industrial and commercial areas
Kronenwetter 2009	Objective 1.1	2009	The Village industrial economic development activities will focus on light industrial, warehousing and assembly.
Weston	Objective 1.2	2006	To use CIP process to ensure that Village infrastructure (roads, water, sewer) is adequate to support industrial growth.
Schofield 2006	Objective 1.1	2006	To improve access to the City's industrial park.
Schofield 2006	Objective 1.2	2006	To encourage redevelopment and enhancements to existing businesses in the industrial park.
Schofield 2006	Objective 1.3	2006	To establish development standards to improve the appearance and attractiveness of the industrial park.

### Theme D: Job Creation and Business Attraction/Development

Four communities specifically mentioned job creation, business attraction, or encouragement of entrepreneurship. While some goals and objectives focused on traditional economic development pursuits, others alluded to improvements in the quality of life to lure businesses into the area.

**Table 6.4: Job Creation and Business Attraction/Development**

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Wausau	<i>Goal 1</i>	2005	To improve the economic well-being of Wausau through efforts that involve jobs creation, job retention, tax base enhancements, and other quality of life initiatives.
Wausau	<i>Objective 1.1</i>	2016	Stimulate community and economic growth and development, supporting business expansion and retention in competitive sectors.
Wausau	<i>Objective 1.1</i>	2005	Encourage the incubation of new local firms and support entrepreneurs with technical, collaborative, and administrative services through the Wausau Business Development Center.
Wausau	<i>Objective 1.2</i>	2016	Cultivate a professional lifestyle environment that attracts and retains professionals and business, developing quality public infrastructure and municipal services which support business expansion and diversification and improves quality of life.
Wausau	<i>Objective 1.2</i>	2005	To use the CIP process to ensure that City infrastructure (roads, water, and sewer) is adequate to support industrial growth.
Wausau	<i>Objective 1.2</i>	2016	Cultivate a professional lifestyle environment that attracts and retains professionals and business, developing quality public infrastructure and municipal services which support business expansion and diversification and improves quality of life.
Rothschild	<i>Objective 1.3</i>	2006, 2016	To consider establishing a Village Economic Development Committee to recruit businesses and services to locate in Rothschild.
Wausau	<i>Objective 1.4</i>	2016	Develop an entrepreneur environment that supports and encourages entrepreneurs and business growth.
Wausau	<i>Objective 1.7</i>	2005	Promote the City of Wausau as an ideal location for establishing new residential, commercial, and industrial development projects because of its low cost of living, extensive infrastructure and services, and high quality of life for employees and business owners. Marketing tools, including the City's economic development web site, trade publications, newsletters to real estate site selectors, and attendance at trade shows should be utilized.
Marathon City	<i>Objective 1.1</i>	2005	To attract new businesses using incentives like the TID.
Marathon City	<i>Objective 2.2</i>	2005	To attract new employers to the area that can take advantage of existing business products or services.
Marathon City	<i>Objective 2.3</i>	2005	To promote the new business park and family-friendly atmosphere of Marathon City to outside businesses and corporations.
Marathon City	<i>Objective 2.1</i>	2005	To attract new businesses using incentives like the TID.
Rothschild	<i>Objective 2.4</i>	2016	Identify and prioritize public infrastructure improvements needed to foster new commercial and industrial development.
Rib Mountain	<i>Objective 3.1</i>	2005	To continue to maintain and support regional-oriented commercial development along Rib Mountain Drive.

### Theme E: Job and Business Retention

Four communities also included job and business retention as a part of their comprehensive plan. This also included traditional strategies to identify struggling businesses or businesses that need assistance to expand. At the same time, improvements in the quality of life again were considered a priority for retaining businesses and their employees.

**Table 6.5: Jobs and Business Retention**

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Wausau	<i>Goal 1</i>	2005	To improve the economic well-being of Wausau through efforts that involve jobs creation, job retention, tax base enhancements, and other quality of life initiatives.
Weston	<i>Objective 1.1</i>	2016	Help existing Weston businesses expand employment and increase sales.
Wausau	<i>Objective 1.1</i>	2016	Stimulate community and economic growth and development, supporting business expansion and retention in competitive sectors.
Wausau	<i>Objective 1.10</i>	2005	Identify issues and opportunities facing key industry groups and take actions to enable them to continue operation and to expand in the City of Wausau
Mosinee	<i>Objective 1.2</i>	2006	To proactively explore funding opportunities to provide support and assistance to established businesses to help them remain and expand in Mosinee.



Weston	Objective 1.2	2006	To proactively explore opportunities to provide support and assistance to help established businesses remain and expand in Rib Mountain.
Weston	Objective 1.2	2016	Support family-supporting jobs to increase Village household incomes.
Weston	Objective 1.3	2006	To ensure that public infrastructure (e.g., water, sewer, and roads/access) is adequate to support redevelopment of existing commercial and industrial properties.
Wausau	Objective 1.6	2005	Provide an environment that encourages expansion and retention of existing businesses through networking and making resources available to foster growth. Economic Development staff should remain as networked in the community as possible, making personal visits to local businesses on a regular basis.
Marathon City	Objective 1.3	2005	Retain current businesses or aid in expansion efforts.
Rothschild	Objective 2.3	2006, 2016	To ensure that public infrastructure (water, sewer, and roads/access) is adequate to support redevelopment of existing commercial and industrial properties.
Mosinee	Objective 3.3	2006	To continue to work with the BID board to provide support and assistance to downtown property owners to help them improve their properties and grow their businesses.
Marathon City	Objective 1.3	2005	Retain current businesses or aid in expansion efforts.

### Theme F: Appropriate Location of Businesses and Industry

Four communities had goals or objectives that were categorized as “appropriate location of businesses and industry”. Most of these goals and objectives referred to ensuring that commercial and industrial businesses development was sustainable, located in areas that corresponded to their land use plans, could access the transportation system, and made use of existing public infrastructure.

Table 6.6 Appropriate Location of Business and Industry

Community	Level	Year	Text
Kronenwetter	Goal	2009	The Village will develop an economic development strategy and master plan to help guide development to appropriate locations.
Rib Mountain	Goal	2005	Encourage new commercial development in appropriate locations
Rothschild	Goal	2006, 2016	Encourage economic development that is sustainable and promotes a high quality of life.
Kronenwetter	Objective 2.1	2009	The Village will work to maximize development in all tax increment districts.
Kronenwetter	Objective 2.2	2009	The Village will promote redevelopment of the Old Highway 51 corridor.
Kronenwetter	Objective 2.3	2009	The Village will support economic development along corridors in compliance with their Master Land Use Plan.
Rib Mountain	Objective 2.1	2005	To identify locations where new commercial development should be directed and encouraged.
Rib Mountain	Objective 3.2	2005	To identify locations to encourage neighborhood-oriented commercial nodes.
Weston	Objective 1.1	2006	To identify locations appropriate for manufacturing uses and ensure they are properly zoned to encourage such use.
Weston	Objective 2.1	2006	To identify potential locations for retail and commercial development and ensure they are properly zoned to encourage those uses.
Weston	Objective 2.2	2006	To work with developers and/or conduct a market study to determine what retail and commercial businesses might be suitable for the Village.

### Theme G: Economic Development Strategy and Master Plan-Local and Regional

Three communities had goals or objectives that were categorized as “Economic Development Strategy and Master Plan-Local and Regional”. These goals and objectives differed from creating the local economic development plans to collaborating with the county and other regional partners. There was also a desire in Wausau to ensure that efforts were not duplicated.



**Table 6.7: Economic Development Strategy and Master Plan-Local and Regional**

Community	Level	Year	Text
Kronenwetter	Goal 1	2009	The Village will develop an economic development strategy and master plan to help guide development to appropriate locations.
Wausau	Objective 1.1	2005	Initiate a program with Marathon County to prepare a Countywide economic development plan.
Rothschild	Objective 1.2	2006, 2016	To integrate growth in Rothschild with the economic development strategy for Central Wisconsin.
Wausau	Objective 1.3	2016	Collaborate with our regional municipalities, corporate partners, and local nonprofits and foundations to develop and commit to a shared economic vision of our region

### Theme H: Tax Bases Enhancements

Three communities identified tax base enhancements either as a way to attract new businesses or to fund public infrastructure improvements.

**Table 6.8: Tax Base Enhancements**

Community	Level	Year	Text
Wausau	Goal 1	2006	To improve the economic well-being of Wausau through efforts that involve jobs creation, job retention, tax base enhancements, and other quality of life initiatives.
Marathon City	Objective 1.1	2005	To attract new businesses using incentives like the TID.
Wausau	Objective 1.2	2006	Create tax increment finance districts to provide some of the financial assistance needed to pursue the City's economic development goals.
Wausau	Objective 1.4	2006	Work to reduce the city's property tax rate to ensure it is not a barrier to new development, business activities, or property ownership.
Marathon City	Objective 2.1	2005	To attract new businesses using incentives like the TID.
Rothschild	Objective 2.5	2016	To continue to implement- Pavilion Market place Redevelopment Plan and Corresponding plan for Tax Incremental Finance District No. 2 to finance public infrastructure improvements, property acquisition , etc. to foster redevelopment of older businesses.

### Theme I: Increase Development in the Downtown

Three communities sought to retain and attract businesses in their downtowns. Other priorities were downtown diversity and façade improvements.

**Table 6.9 Increase development in the downtown**

Community	Level	Year	Text
Marathon City	Goal	2005	Increase development in the downtown
Mosinee	Goal	2006	Maintain business vitality in downtown to provide a mix of goods and services for the City and surrounding area.
Marathon City	Objective 1.2	2005	Redevelop existing business facades to increase the appeal of the downtown area.
Marathon City	Objective 1.4	2005	To determine what business entities are lacking in the downtown and recruit accordingly (e.g. drug store).
Wausau	Objective 1.9	2016	Support economic revitalization of downtown by encouraging diverse economic activity, including government and professional offices; insurance and financial services; convention, lodging, food/beverage, and entertainment; education and training; retail trade; and high-density residential uses.
Mosinee	Objective 3.1	2006	To continue to support the efforts of the Downtown Business Improvement District (BID) to enhance the downtown central business district.

Mosinee	<i>Objective 3.2</i>	2006	To continue to work with the BID to encourage new businesses to locate downtown.
Mosinee	<i>Objective 3.3</i>	2006	To continue to work with the BID board to provide support and assistance to downtown property owners to help them improve their properties and grow their businesses.

### Theme J: Improve and utilize relationships to increase economic development

Two communities signaled that improving relationships for economic development was a priority for them. These communities included surrounding communities, the county, economic development corporations, local educational institutions, and the WisDOT as actors that they would like to improve relationships with.

Table 6.10: Improve and utilize relationships to increase economic development

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Wausau	<i>Objective 1.2</i>	2005	Encourage Marathon County government leaders to partner with the city on some Wausau's economic development as an industrial park should be identified, if possible, within the long-term growth area on the City's east side. An industrial park in the vicinity of the Eastern Arterial (Cth X) would have good transportation linkages.
Wausau	<i>Objective 1.5</i>	2005	Coordinate economic development activities between the City of Wausau, Marathon County, and other communities within the urban area to assure there is not a duplication of economic development services and to minimize the creation of competing publicly-funded economic development activities.
Wausau	<i>Objective 1.8</i>	2005	Maintain existing and create new private/public partnerships to demonstrate the community's commitment to, and support for, economic expansion.
Kronenwetter	<i>Objective 3.1</i>	2009	The Village will continue to work with the Wisconsin Department of Transportation to increase access to I-39.
Kronenwetter	<i>Objective 3.2</i>	2009	The Village will work with surrounding communities and Marathon County to utilize the CWA expansion as an opportunity to attract additional business and industry near the airport.
Kronenwetter	<i>Objective 3.4</i>	2009	The Village will promote its quality work force and school systems.

### Theme K: Encourage Full Development of Business/Industrial Park

Two communities had goals or objectives that were categorized as “Encourage full development of Business/Industrial Park”. These goals and objectives ranged from simply filling the business/industrial park, to helping business overcoming barriers, to actively seeking appropriate business for the park through media and marketing.

Table 6.11: Encourage Full Development of Business/Industrial Park

<i>Community</i>	<i>Level</i>	<i>Year</i>	<i>Text</i>
Mosinee	<i>Goal</i>	Year	Encourage full development of Business/Industrial Park
Kronenwetter	<i>Objective 2.1</i>	2009	The Village will work to maximize development in all tax increment districts.
Mosinee	<i>Objective 2.1</i>	2006	To work with potential new businesses to overcome barriers to develop on lots with physical constraints (e.g., high bedrock) in the business park.
Mosinee	<i>Objective 2.2</i>	2006	To proactively seek potential new businesses and market remaining undeveloped land in the business park.
Kronenwetter	<i>Objective 3.2</i>	2009	The Village will utilize local media and marketing to promote business opportunities in the Village.

## Framework

The themes from above can be refined into more succinct themes. Combined with the economic analysis and the planning discussion, the beginnings of a framework can be outlined. Also included with the framework are some potential tasks identified from the economic analysis. This becomes the end point of this effort and the starting point for the Economic Development Strategy.

### Framework:

#### I. Retain and Expand Existing Area Businesses

- Create programs that focus on supporting local sectors having location quotients (LQ) greater than one, such as Manufacturing with a 2.5 LQ. (See Figure 4.2 and Table 4.2.)
- Further breaking down this sector there are three subindustries with extremely high LQs and employ over 1,000 persons. These are Ventilation, Heating and Air-Conditioning Equipment Manufacturing; Wood Products Manufacturing; and Structural Metals Manufacturing.
- Further examination identifies five subindustries with extremely high LQs, although lesser levels of employment. These are: Hardware Manufacturing; Aluminum Production and Processing; Dairy Product Manufacturing; Coating and Heat Treating Activities; and Commercial and Service Industry Machinery Manufacturing.

#### II. Support New Business Creation

- Expand entrepreneurial capacity in the area. Only one incubator currently serves the area, identify location for additional space and services.
- Develop a start-up program targeted to fill gaps identified in the industry cluster analysis.
- Develop a start-up program targeted to fill gaps identified in the supply chain analysis.

#### III. Attract Impactful New Businesses

- Pursue businesses that present opportunity as part of the supply chain, such as Manufacturing. (See Table 4.3 and Appendix D.)
- Further breaking down this sector there are numerous subindustry opportunities. Those with low “in region purchases” have potential, such as Machine Shops (3327).

- Expand existing industry clusters with high skill high wage demands. Focus efforts on those businesses that complement and support existing area businesses, such as Technology and Heavy Machinery. (See Table 4.5.)
- Develop targeted recruitment efforts to reach these firms to relocate to area.

#### IV. Educate & Train Workforce

- Develop training programs in areas of high need - these are the most critical as the workforce retires and area firms need to replace those positions, such as Nurses and Maintenance and Repair Workers. (See Appendix A)

#### V. Develop a formal structure for Collaboration

- Build off of the Municipalities Agreement and establish a formal program to work together in various economic development efforts, such as:

Establish a joint marketing program where all communities pool resources to market the area.

Identify and propose a reorganization and expansion of existing economic development organizations to better serve the needs of the area

#### VI. Improve Metro Region Livability

- Increase Community Quality of Life to Attract People
- Develop Needed Infrastructure for Business to Prosper
- Encourage Needed Housing Options for all segments of the population

## Chapter 7: Next Steps

Over the course of this planning effort a variety of information was gathered starting with community comprehensive plans and economic data collected from numerous state and federal sources. That data was analyzed and is presented in the previous chapters. In addition, as part of the process there has been discussion related to this information. This chapter captures some of the issues and opportunities discussed.

### Issues & Opportunities

During the planning process the metro group has identified several issues and opportunities that they would like to see addressed in the next phase.

One problem or issue was the general public demand for additional big box retail and restaurant chains in the area. The group discussed the issue of food service and retail services having difficulty filling positions at these stores and restaurants. Furthermore, these are usually not living wage jobs.

Another issue was the conflict of interests between municipal economic development goals and the needs of employers. If there is already a labor shortage which will become worse in the near future, municipalities bringing in new businesses to increase their tax base will hurt the businesses that are already in the area. While there does not seem to be a simple solution to this issue, one way to mitigate the problem would be for municipal economic development strategies to add more focus on recruiting more workers to the area in addition to business attraction.

There was also a call for Marathon County and MCDEVCO to clarify their roles in economic development in the county. As the second step of this process progresses, the regional economic development strategy, appropriate roles may become clearer as solid strategies and objectives are formulated.

There was a lengthy discussion related to the existing structure and assistance of local economic development organizations. As an example, Sheboygan County Economic Development Corporation's organizational structure was seen as a successful model. SCEDC has four professional staff that work on the three identified priority areas, including: attraction marketing, business development and workforce development. The SCEDC recently completed a strategic plan to set goals and priorities of the organization. Some comments suggested this could be a model that MCDEVCO or Marathon County could emulate.

Some of the areas identified for regional cooperation were a regional marketing strategy, entrepreneurial development, and creating a program for further development of broadband. There are a number of areas both in the metro region and Marathon County where internet providers have deemed it too expensive to extend broadband infrastructure. Because of the potential of this issue to not only impede future business attraction, but also business expansions and retention, as well as population attraction and retention, this issue should be aggressively resolved.

Another issue is the lack of business incubator space. It was noted that Vilas County has multiple business incubators, while Marathon County only has one. Assistance to start-ups and business counseling is important. A feasibility study could be done to assess area needs and potential funding for another incubator building/programs.

Developing a targeted business recruitment strategy based on the economic assessment was discussed. A strategy would involve prioritizing specific metro regional industry clusters, identifying complementary subindustries, and researching those subindustry firms located outside of our region with the final result being a targeted recruitment prospect list.

A workforce recruitment strategy based on the economic assessment and occupational needs of the existing business community was also discussed. Ideas mentioned included targeting specific educational institutions or areas with recent layoffs to recruit specific occupations to our region. Also mentioned were using various financial incentives, such as scholarships for students who pledged to work in the metro region for a certain length of time or housing assistance to those relocating to the area.

As well as discussion there was a brief five question survey provided to the communities. Not all, but most, responded to the survey. Some of the comments from those surveys are listed below:

A question was asked related to the various activities each undertaken related to economic development. A variety of tasks were mentioned, such as infrastructure, marketing, community events, recruitment, TIF, small business loans, attending various retail conferences, and maintaining a website/social media.

Another question related to time spent of economic activities. Of those that responded only two communities devote about 1 FTE toward these activities, while others only spend a few hours to a day or two per week.

“What are you not doing” was another question. There were a variety of tasks mentioned, but the main task not being completed was targeted marketing. General marketing and completing retention/expansion visits was also mentioned.

A question was asked related to the various organizations the communities work with related to economic development. The responses included: WEDC, DOA, MCDEVCO, Centergy, Chamber, Wausau CVB, WEDA, NCWRPC, and local partners. One mentioned the International Council of Shopping Centers.

Finally, the last question asked “what are some joint opportunities for economic development in the area.” Several items were mentioned, they are: Marketing, Targeted Business Recruiting, Joint TIF planning, Housing Study, Corridor Planning, Community Level Supply Chain Analysis, Workforce Analysis, Entrepreneurial Center in South Metro, Business Retention/Expansion visits, Metro Region Retail Study, and Shared Regional Economic Development Strategy. An economic impact study of Granite Peak on the community was also mentioned.

## Conclusion

The Economic Development Assessment Study was intended to be just the beginning of a much larger effort. The overall goal is to develop a Metro Region Economic Development Strategy, as well as various implementation tasks, that are supported by the area communities.

The steps to move forward are identified below.

Step One - Solidify commitment from the group to move forward together to prepare a Targeted Business Recruitment Strategy and a Workforce Recruitment Strategy as part of an overall Metro Region Strategy. These two efforts are further defined below:

- Targeted Business Recruitment:

Develop a targeted business recruitment strategy based on the economic assessment. This strategy will involve prioritizing specific metro regional industry clusters, identifying complementary subindustries, and researching those subindustry firms located outside of our region. The final result will be a targeted recruitment prospect list. Jointly the metro region can begin communication with these firms related to expansion or relocation to the area.

- Workforce Recruitment:

Develop a workforce recruitment strategy based on the economic assessment and occupational needs of the existing business community. This strategy will identify highest need occupations and outline specific programs for attraction, such as targeting educational institutions or areas with recent layoffs to recruit specific occupations to our region. The strategy will also include potential financial incentives. These might include scholarships to students who pledge to work in the metro region for a certain time period or housing subsidies for those relocating to the area.

Step Two - Identify and secure funding to engage a consultant(s) to complete the projects. MCDEVCO has already begun work on this step.

Step Three - Designate a working group to prepare and conduct a Request for Proposal (RFP) process for these projects. Timelines for each effort may be different. The full Metro Region group would provide oversight to these efforts.

Step Four - Select a highly skilled consultant to prepare the Metro Region Economic Development Targeted Business Recruitment and Workforce Recruitment Strategies. Consultant(s) will use the Metro Region Economic Development Assessment study as the foundation for developing these strategies. NCWRPC will continue to provide data and other assistance to these efforts.

Step Five - Work with the consultant(s) to complete the Strategies. The strategies are anticipated to include an overall joint work plan, as well as specific community level work items.

Step Six - Implementation. Together and individually set in motion the strategies to grow the Metro Region for the next decade.



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Appendix A: Metro Region Occupations with at Least 100 Openings, 2016-2026

SOC	Description	2016 Jobs	2026 Jobs	2016 - 2026 Openings	Annual Openings	Regional Completions (2015)	Median Hourly Earnings
41-2031	Retail Salespersons	2,017	2,088	820	82	0	\$9.73
29-1141	Registered Nurses	1,407	1,763	741	74	69	\$29.85
41-2011	Cashiers	1,373	1,461	706	71	0	\$9.18
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	1,363	1,538	650	65	0	\$8.94
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1,567	1,577	524	52	0	\$13.65
31-1014	Nursing Assistants	1,017	1,259	505	51	423	\$12.70
43-9061	Office Clerks, General	2,006	2,020	493	49	9	\$13.96
35-3031	Waiters and Waitresses	697	772	432	43	0	\$9.09
39-9021	Personal Care Aides	1,231	1,546	431	43	1	\$11.12
43-4051	Customer Service Representatives	1,095	1,178	379	38	0	\$14.82
43-5081	Stock Clerks and Order Fillers	906	959	366	37	0	\$9.54
51-2092	Team Assemblers	1,167	1,146	343	34	0	\$13.69
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	968	1,081	319	32	0	\$11.13
43-4171	Receptionists and Information Clerks	596	706	289	29	9	\$13.19
35-3011	Bartenders	590	644	287	29	0	\$9.42
11-1021	General and Operations Managers	819	883	285	29	55	\$36.27
13-2011	Accountants and Auditors	422	558	272	27	37	\$30.17
53-3032	Heavy and Tractor-Trailer Truck Drivers	1,428	1,295	247	25	0	\$17.25
49-9071	Maintenance and Repair Workers, General	755	771	240	24	0	\$20.51
37-2012	Maids and Housekeeping Cleaners	597	667	221	22	0	\$9.67
31-9092	Medical Assistants	286	413	203	20	71	\$15.55
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	792	799	194	19	0	\$26.92
35-2014	Cooks, Restaurant	379	449	182	18	0	\$10.53
43-1011	First-Line Supervisors of Office and Administrative Support Workers	688	757	181	18	118	\$22.76
51-4121	Welders, Cutters, Solderers, and Brazers	459	495	178	18	460	\$17.86
53-7064	Packers and Packagers, Hand	572	584	173	17	0	\$12.48
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	370	417	165	17	0	\$11.48
47-2111	Electricians	266	374	161	16	7	\$27.61
51-4041	Machinists	389	420	158	16	47	\$17.39
51-9198	Helpers--Production Workers	444	408	151	15	0	\$11.54
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	171	188	146	15	0	\$9.02
31-9091	Dental Assistants	204	286	145	15	17	\$17.01
41-1011	First-Line Supervisors of Retail Sales Workers	387	432	139	14	0	\$17.77
29-2061	Licensed Practical and Licensed Vocational Nurses	148	230	138	14	67	\$19.24
51-1011	First-Line Supervisors of Production and Operating Workers	680	644	130	13	171	\$21.78
25-2021	Elementary School Teachers, Except Special Education	521	532	129	13	0	\$26.10
25-9041	Teacher Assistants	456	471	126	13	0	\$12.45
49-3023	Automotive Service Technicians and Mechanics	303	342	126	13	41	\$19.33

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51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	223	269	125	13	47	\$18.16
11-9111	Medical and Health Services Managers	226	284	124	12	0	\$41.36
43-9041	Insurance Claims and Policy Processing Clerks	366	328	123	12	9	\$16.56
43-3071	Tellers	215	240	115	12	0	\$12.17
53-7051	Industrial Truck and Tractor Operators	432	402	115	12	0	\$13.97
13-1031	Claims Adjusters, Examiners, and Investigators	266	268	114	11	0	\$29.41
53-3033	Light Truck or Delivery Services Drivers	542	556	111	11	0	\$14.85
43-6013	Medical Secretaries	209	293	111	11	46	\$17.76
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	329	400	110	11	7	\$15.96
51-9111	Packaging and Filling Machine Operators and Tenders	288	283	110	11	0	\$18.97
25-3098	Substitute Teachers	464	480	106	11	0	\$12.24
29-2021	Dental Hygienists	212	276	105	11	30	\$28.52
45-2092	Farmworkers and Laborers, Crop, Nursery, and Greenhouse	299	319	104	10	0	\$10.30
31-1011	Home Health Aides	43	126	104	10	1	\$9.70
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	301	318	103	10	0	\$18.06
43-3021	Billing and Posting Clerks	205	258	102	10	13	\$16.85
35-2021	Food Preparation Workers	266	290	101	10	0	\$9.28
49-9041	Industrial Machinery Mechanics	224	233	87	9	8	\$25.56

Appendix B: Regional Demand for Industry

NAICS	Demand for	Demand met In-region	% Demand met In-region	Demand met by Imports	% Demand met by Imports	Total Demand
9011	Federal Government, Civilian	\$10,190,339	0.9%	\$1,065,777,255	99.1%	\$1,075,967,594
9029	State Government, Excluding Education and Hospitals	\$18,012,111	3.9%	\$438,150,221	96.1%	\$456,162,332
1120	Animal Production and Aquaculture	\$35,014,314	8.6%	\$371,033,393	91.4%	\$406,047,708
9039	Local Government, Excluding Education and Hospitals	\$362,996,841	100.0%	\$0	0.0%	\$362,996,841
5242	Agencies, Brokerages, and Other Insurance Related Activities	\$59,752,017	21.3%	\$220,820,245	78.7%	\$280,572,262
5511	Management of Companies and Enterprises	\$24,404,506	9.3%	\$238,670,303	90.7%	\$263,074,809
5241	Insurance Carriers	\$136,360,069	54.6%	\$113,506,087	45.4%	\$249,866,157
3241	Petroleum and Coal Products Manufacturing	\$1,645,026	0.7%	\$228,523,544	99.3%	\$230,168,570
6221	General Medical and Surgical Hospitals	\$215,109,873	99.9%	\$117,259	0.1%	\$215,227,132
3115	Dairy Product Manufacturing	\$104,164,614	52.2%	\$95,207,212	47.8%	\$199,371,826
9036	Education and Hospitals (Local Government)	\$174,038,767	91.7%	\$15,728,793	8.3%	\$189,767,560
5311	Lessors of Real Estate	\$85,736,533	45.9%	\$101,034,965	54.1%	\$186,771,498
7225	Restaurants and Other Eating Places	\$117,983,147	63.6%	\$67,524,426	36.4%	\$185,507,573
5221	Depository Credit Intermediation	\$48,924,608	34.6%	\$92,383,621	65.4%	\$141,308,229
6211	Offices of Physicians	\$108,585,433	77.9%	\$30,793,240	22.1%	\$139,378,673
3221	Pulp, Paper, and Paperboard Mills	\$32,431,467	24.6%	\$99,174,293	75.4%	\$131,605,760
4251	Wholesale Electronic Markets and Agents and Brokers	\$9,115,079	7.5%	\$113,175,142	92.5%	\$122,290,221
5171	Wired Telecommunications Carriers	\$47,816,815	41.7%	\$66,723,635	58.3%	\$114,540,450
4841	General Freight Trucking	\$45,709,727	40.9%	\$65,937,692	59.1%	\$111,647,419
5239	Other Financial Investment Activities	\$9,620,397	9.5%	\$91,189,897	90.5%	\$100,810,294
3313	Alumina and Aluminum Production and Processing	\$20,293,327	20.2%	\$80,353,663	79.8%	\$100,646,990
3311	Iron and Steel Mills and Ferroalloy Manufacturing	\$0	0.0%	\$98,795,574	100.0%	\$98,795,574
2211	Electric Power Generation, Transmission and Distribution	\$25,235,490	25.8%	\$72,650,745	74.2%	\$97,886,235
2382	Building Equipment Contractors	\$63,213,029	64.7%	\$34,501,769	35.3%	\$97,714,798
5415	Computer Systems Design and Related Services	\$11,595,521	12.2%	\$83,600,189	87.8%	\$95,195,711
5313	Activities Related to Real Estate	\$17,944,148	19.8%	\$72,702,596	80.2%	\$90,646,744
5411	Legal Services	\$37,473,362	44.2%	\$47,277,985	55.8%	\$84,751,347
3251	Basic Chemical Manufacturing	\$4,929,480	5.9%	\$78,560,135	94.1%	\$83,489,615
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	\$1,766,343	2.1%	\$80,517,692	97.9%	\$82,284,035
3361	Motor Vehicle Manufacturing	\$0	0.0%	\$81,164,001	100.0%	\$81,164,001
5413	Architectural, Engineering, and Related Services	\$39,442,338	51.8%	\$36,757,177	48.2%	\$76,199,515
3261	Plastics Product Manufacturing	\$1,487,486	2.0%	\$73,630,634	98.0%	\$75,118,120
3222	Converted Paper Product Manufacturing	\$12,284,158	16.8%	\$60,730,079	83.2%	\$73,014,237
3254	Pharmaceutical and Medicine Manufacturing	\$2,150,172	3.1%	\$66,926,403	96.9%	\$69,076,574
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	\$4,064,113	5.9%	\$64,427,425	94.1%	\$68,491,539
3211	Sawmills and Wood Preservation	\$2,415,693	3.5%	\$65,725,685	96.5%	\$68,141,378
5416	Management, Scientific, and Technical Consulting Services	\$13,755,462	20.9%	\$52,159,627	79.1%	\$65,915,089
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$36,100,433	55.7%	\$28,683,740	44.3%	\$64,784,172
7211	Traveler Accommodation	\$24,347,812	37.9%	\$39,944,392	62.1%	\$64,292,204

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3363	Motor Vehicle Parts Manufacturing	\$15,661,801	25.0%	\$46,957,132	75.0%	\$62,618,933
5312	Offices of Real Estate Agents and Brokers	\$18,450,054	29.9%	\$43,271,322	70.1%	\$61,721,376
4411	Automobile Dealers	\$38,041,638	66.3%	\$19,306,169	33.7%	\$57,347,807
6113	Colleges, Universities, and Professional Schools	\$5,793,254	10.1%	\$51,494,914	89.9%	\$57,288,168
5617	Services to Buildings and Dwellings	\$21,719,174	38.0%	\$35,498,875	62.0%	\$57,218,049
4244	Grocery and Related Product Merchant Wholesalers	\$9,616,638	17.0%	\$46,915,156	83.0%	\$56,531,793
4451	Grocery Stores	\$37,630,898	66.6%	\$18,880,802	33.4%	\$56,511,699
5613	Employment Services	\$18,101,223	32.4%	\$37,847,596	67.6%	\$55,948,819
3323	Architectural and Structural Metals Manufacturing	\$20,642,285	38.1%	\$33,497,501	61.9%	\$54,139,786
5417	Scientific Research and Development Services	\$1,406,701	2.6%	\$52,265,521	97.4%	\$53,672,222
5172	Wireless Telecommunications Carriers (except Satellite)	\$2,271,392	4.4%	\$49,808,398	95.6%	\$52,079,790
5231	Securities and Commodity Contracts Intermediation and Brokerage	\$7,854,138	15.8%	\$41,813,785	84.2%	\$49,667,923
2212	Natural Gas Distribution	\$0	0.0%	\$49,463,286	100.0%	\$49,463,286
1110	Crop Production	\$2,182,246	4.4%	\$47,106,348	95.6%	\$49,288,595
5259	Other Investment Pools and Funds	\$11,094,277	22.7%	\$37,767,690	77.3%	\$48,861,967
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	\$24,853,112	53.7%	\$21,434,963	46.3%	\$46,288,075
4821	Rail Transportation	\$2,418,303	5.3%	\$42,819,744	94.7%	\$45,238,047
3116	Animal Slaughtering and Processing	\$141,290	0.3%	\$44,672,078	99.7%	\$44,813,368
2362	Nonresidential Building Construction	\$20,518,651	46.3%	\$23,781,718	53.7%	\$44,300,369
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$499,659	1.1%	\$43,083,081	98.9%	\$43,582,740
4811	Scheduled Air Transportation	\$3,581,342	8.3%	\$39,639,475	91.7%	\$43,220,817
5419	Other Professional, Scientific, and Technical Services	\$10,755,588	25.1%	\$32,027,368	74.9%	\$42,782,956
3111	Animal Food Manufacturing	\$1,619,750	3.9%	\$40,382,966	96.1%	\$42,002,715
4529	Other General Merchandise Stores	\$34,893,932	83.3%	\$6,984,434	16.7%	\$41,878,365
4842	Specialized Freight Trucking	\$17,223,091	43.1%	\$22,771,592	56.9%	\$39,994,682
5418	Advertising, Public Relations, and Related Services	\$5,130,752	12.8%	\$34,828,377	87.2%	\$39,959,129
5222	Nondepository Credit Intermediation	\$8,974,878	22.6%	\$30,780,718	77.4%	\$39,755,596
2361	Residential Building Construction	\$17,190,625	43.7%	\$22,137,656	56.3%	\$39,328,281
3219	Other Wood Product Manufacturing	\$22,366,979	57.1%	\$16,793,353	42.9%	\$39,160,331
3121	Beverage Manufacturing	\$848,951	2.2%	\$37,676,926	97.8%	\$38,525,877
4461	Health and Personal Care Stores	\$16,713,736	44.3%	\$21,027,449	55.7%	\$37,741,185
5112	Software Publishers	\$102,248	0.3%	\$37,636,245	99.7%	\$37,738,493
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	\$778,784	2.1%	\$36,838,483	97.9%	\$37,617,266
4931	Warehousing and Storage	\$5,507,105	14.8%	\$31,688,271	85.2%	\$37,195,375
6231	Nursing Care Facilities (Skilled Nursing Facilities)	\$25,545,383	68.9%	\$11,527,319	31.1%	\$37,072,702
2383	Building Finishing Contractors	\$15,978,767	43.3%	\$20,937,135	56.7%	\$36,915,902
2389	Other Specialty Trade Contractors	\$12,893,283	35.7%	\$23,211,891	64.3%	\$36,105,175
3314	Nonferrous Metal (except Aluminum) Production and Processing	\$0	0.0%	\$35,298,328	100.0%	\$35,298,328
3339	Other General Purpose Machinery Manufacturing	\$1,610,563	4.7%	\$32,996,562	95.3%	\$34,607,125
8111	Automotive Repair and Maintenance	\$21,090,099	61.0%	\$13,498,394	39.0%	\$34,588,493
2381	Foundation, Structure, and Building Exterior Contractors	\$9,928,111	29.3%	\$24,012,682	70.7%	\$33,940,793
8131	Religious Organizations	\$20,306,019	60.0%	\$13,541,458	40.0%	\$33,847,477
5111	Newspaper, Periodical, Book, and Directory Publishers	\$9,842,872	29.1%	\$23,929,194	70.9%	\$33,772,066
3344	Semiconductor and Other Electronic Component Manufacturing	\$0	0.0%	\$33,624,228	100.0%	\$33,624,228

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6214	Outpatient Care Centers	\$23,819,751	71.7%	\$9,416,341	28.3%	\$33,236,092
5191	Other Information Services	\$209,153	0.6%	\$32,866,546	99.4%	\$33,075,698
3391	Medical Equipment and Supplies Manufacturing	\$442,659	1.3%	\$32,588,767	98.7%	\$33,031,426
4441	Building Material and Supplies Dealers	\$24,075,966	73.2%	\$8,819,689	26.8%	\$32,895,655
2131	Support Activities for Mining	\$0	0.0%	\$32,814,832	100.0%	\$32,814,832
6241	Individual and Family Services	\$22,499,629	70.0%	\$9,641,376	30.0%	\$32,141,005
6212	Offices of Dentists	\$27,831,585	87.9%	\$3,848,329	12.1%	\$31,679,914
3119	Other Food Manufacturing	\$2,139,619	6.8%	\$29,310,862	93.2%	\$31,450,481
5182	Data Processing, Hosting, and Related Services	\$1,157,107	3.7%	\$30,252,145	96.3%	\$31,409,252
3255	Paint, Coating, and Adhesive Manufacturing	\$2,250,668	7.4%	\$28,341,645	92.6%	\$30,592,313
4242	Drugs and Druggists' Sundries Merchant Wholesalers	\$62,448	0.2%	\$30,504,618	99.8%	\$30,567,066
3329	Other Fabricated Metal Product Manufacturing	\$6,467,540	21.2%	\$24,002,769	78.8%	\$30,470,309
3273	Cement and Concrete Product Manufacturing	\$9,364,654	31.7%	\$20,131,015	68.3%	\$29,495,669
3112	Grain and Oilseed Milling	\$0	0.0%	\$29,044,175	100.0%	\$29,044,175
4239	Miscellaneous Durable Goods Merchant Wholesalers	\$5,776,739	19.9%	\$23,231,397	80.1%	\$29,008,136
5614	Business Support Services	\$4,353,451	15.0%	\$24,617,134	85.0%	\$28,970,585
2123	Nonmetallic Mineral Mining and Quarrying	\$4,526,131	15.8%	\$24,105,559	84.2%	\$28,631,690
6213	Offices of Other Health Practitioners	\$19,363,368	68.1%	\$9,068,344	31.9%	\$28,431,712
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$7,260,394	26.8%	\$19,872,895	73.2%	\$27,133,289
4521	Department Stores	\$20,978,529	77.6%	\$6,071,370	22.4%	\$27,049,899
5121	Motion Picture and Video Industries	\$1,825,086	6.8%	\$25,051,330	93.2%	\$26,876,416
2371	Utility System Construction	\$3,885,056	14.6%	\$22,694,678	85.4%	\$26,579,734
3364	Aerospace Product and Parts Manufacturing	\$0	0.0%	\$26,518,985	100.0%	\$26,518,985
4921	Couriers and Express Delivery Services	\$18,080,641	68.3%	\$8,398,784	31.7%	\$26,479,426
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	\$1,121,165	4.3%	\$25,036,772	95.7%	\$26,157,936
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	\$44,838	0.2%	\$25,909,717	99.8%	\$25,954,555
3399	Other Miscellaneous Manufacturing	\$1,261,079	4.9%	\$24,476,426	95.1%	\$25,737,505
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	\$3,516,990	13.7%	\$22,198,341	86.3%	\$25,715,332
2111	Oil and Gas Extraction	\$468,026	1.9%	\$24,660,367	98.1%	\$25,128,393
9012	Federal Government, Military	\$0	0.0%	\$24,941,432	100.0%	\$24,941,432
3231	Printing and Related Support Activities	\$706,215	2.8%	\$24,176,811	97.2%	\$24,883,026
3331	Agriculture, Construction, and Mining Machinery Manufacturing	\$832,530	3.3%	\$24,027,332	96.7%	\$24,859,862
7139	Other Amusement and Recreation Industries	\$13,706,121	55.6%	\$10,941,771	44.4%	\$24,647,893
6216	Home Health Care Services	\$8,792,367	36.1%	\$15,561,778	63.9%	\$24,354,145
3353	Electrical Equipment Manufacturing	\$3,364,763	13.9%	\$20,810,259	86.1%	\$24,175,022
5151	Radio and Television Broadcasting	\$15,628,033	64.7%	\$8,520,538	35.3%	\$24,148,571
2121	Coal Mining	\$0	0.0%	\$23,899,982	100.0%	\$23,899,982
3312	Steel Product Manufacturing from Purchased Steel	\$0	0.0%	\$23,489,029	100.0%	\$23,489,029
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	\$8,081,380	34.5%	\$15,314,403	65.5%	\$23,395,782
3315	Foundries	\$0	0.0%	\$23,210,513	100.0%	\$23,210,513
8121	Personal Care Services	\$13,118,313	57.2%	\$9,816,814	42.8%	\$22,935,127
3279	Other Nonmetallic Mineral Product Manufacturing	\$7,353,685	32.3%	\$15,423,693	67.7%	\$22,777,378
3328	Coating, Engraving, Heat Treating, and Allied Activities	\$4,702,081	21.0%	\$17,643,598	79.0%	\$22,345,678
3118	Bakeries and Tortilla Manufacturing	\$236,424	1.1%	\$21,779,457	98.9%	\$22,015,881
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers	\$0	0.0%	\$21,752,321	100.0%	\$21,752,321



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	and Filaments Manufacturing					
6215	Medical and Diagnostic Laboratories	\$12,200,630	56.2%	\$9,494,273	43.8%	\$21,694,903
4481	Clothing Stores	\$10,026,507	46.7%	\$11,434,051	53.3%	\$21,460,558
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	\$6,889,522	33.0%	\$13,997,834	67.0%	\$20,887,355
4541	Electronic Shopping and Mail-Order Houses	\$350,390	1.7%	\$20,211,800	98.3%	\$20,562,190
4431	Electronics and Appliance Stores	\$10,971,308	53.5%	\$9,531,411	46.5%	\$20,502,719
6111	Elementary and Secondary Schools	\$4,243,524	20.7%	\$16,253,459	79.3%	\$20,496,983
3321	Forging and Stamping	\$4,847,131	24.2%	\$15,183,211	75.8%	\$20,030,342
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	\$6,398,046	32.5%	\$13,298,005	67.5%	\$19,696,051
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	\$256,226	1.3%	\$19,280,794	98.7%	\$19,537,020
3324	Boiler, Tank, and Shipping Container Manufacturing	\$8,841,365	45.7%	\$10,520,534	54.3%	\$19,361,899
5321	Automotive Equipment Rental and Leasing	\$8,694,098	45.3%	\$10,487,578	54.7%	\$19,181,676
3259	Other Chemical Product and Preparation Manufacturing	\$0	0.0%	\$18,916,182	100.0%	\$18,916,182
1133	Logging	\$1,668,655	9.2%	\$16,544,098	90.8%	\$18,212,753
5223	Activities Related to Credit Intermediation	\$206,365	1.1%	\$17,921,947	98.9%	\$18,128,312
8129	Other Personal Services	\$5,728,027	32.1%	\$12,123,510	67.9%	\$17,851,536
5619	Other Support Services	\$4,414,822	25.4%	\$12,945,727	74.6%	\$17,360,549
5615	Travel Arrangement and Reservation Services	\$3,926,054	22.7%	\$13,381,355	77.3%	\$17,307,409
5611	Office Administrative Services	\$1,168,448	6.8%	\$16,097,194	93.2%	\$17,265,642
3341	Computer and Peripheral Equipment Manufacturing	\$91,176	0.5%	\$17,000,033	99.5%	\$17,091,208
4471	Gasoline Stations	\$6,198,431	36.6%	\$10,750,556	63.4%	\$16,948,988
5616	Investigation and Security Services	\$5,869,435	34.7%	\$11,049,766	65.3%	\$16,919,201
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	\$7,951,701	47.1%	\$8,931,986	52.9%	\$16,883,687
4233	Lumber and Other Construction Materials Merchant Wholesalers	\$11,608,289	70.0%	\$4,968,058	30.0%	\$16,576,347
2373	Highway, Street, and Bridge Construction	\$8,147,258	49.4%	\$8,353,239	50.6%	\$16,500,497
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	\$8,125,678	49.4%	\$8,311,571	50.6%	\$16,437,250
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	\$0	0.0%	\$16,055,172	100.0%	\$16,055,172
3359	Other Electrical Equipment and Component Manufacturing	\$130,997	0.8%	\$15,800,745	99.2%	\$15,931,742
4413	Automotive Parts, Accessories, and Tire Stores	\$11,031,788	70.3%	\$4,662,614	29.7%	\$15,694,402
4539	Other Miscellaneous Store Retailers	\$10,729,815	68.4%	\$4,951,949	31.6%	\$15,681,764
3332	Industrial Machinery Manufacturing	\$2,867,675	18.5%	\$12,626,689	81.5%	\$15,494,364
8139	Business, Professional, Labor, Political, and Similar Organizations	\$4,825,373	31.7%	\$10,414,272	68.3%	\$15,239,645
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	\$131,286	0.9%	\$14,716,183	99.1%	\$14,847,470
4246	Chemical and Allied Products Merchant Wholesalers	\$3,378,287	22.9%	\$11,382,452	77.1%	\$14,760,739
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	\$132,748	0.9%	\$14,414,246	99.1%	\$14,546,994
6244	Child Day Care Services	\$11,351,322	81.7%	\$2,546,735	18.3%	\$13,898,057
4885	Freight Transportation Arrangement	\$1,413,062	10.4%	\$12,173,917	89.6%	\$13,586,978
4543	Direct Selling Establishments	\$7,182,601	53.0%	\$6,358,342	47.0%	\$13,540,943
9026	Education and Hospitals (State Government)	\$1,877,861	14.2%	\$11,367,775	85.8%	\$13,245,636
5152	Cable and Other Subscription Programming	\$0	0.0%	\$13,024,033	100.0%	\$13,024,033
3335	Metalworking Machinery Manufacturing	\$813,647	6.3%	\$12,158,919	93.7%	\$12,972,566
3262	Rubber Product Manufacturing	\$48,313	0.4%	\$12,663,220	99.6%	\$12,711,533

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3362	Motor Vehicle Body and Trailer Manufacturing	\$0	0.0%	\$12,663,723	100.0%	\$12,663,723
3132	Fabric Mills	\$0	0.0%	\$12,450,710	100.0%	\$12,450,710
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	\$887,618	7.2%	\$11,506,486	92.8%	\$12,394,105
6219	Other Ambulatory Health Care Services	\$4,074,171	33.3%	\$8,176,887	66.7%	\$12,251,057
5251	Insurance and Employee Benefit Funds	\$0	0.0%	\$12,084,284	100.0%	\$12,084,284
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	\$5,547,996	46.6%	\$6,346,716	53.4%	\$11,894,711
7112	Spectator Sports	\$741,436	6.4%	\$10,803,186	93.6%	\$11,544,621
4511	Sporting Goods, Hobby, and Musical Instrument Stores	\$7,719,074	66.9%	\$3,816,995	33.1%	\$11,536,069
7223	Special Food Services	\$2,088,759	18.1%	\$9,430,445	81.9%	\$11,519,204
5414	Specialized Design Services	\$964,038	8.7%	\$10,060,195	91.3%	\$11,024,232
4241	Paper and Paper Product Merchant Wholesalers	\$747,383	6.8%	\$10,177,330	93.2%	\$10,924,713
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	\$2,134,467	19.7%	\$8,704,449	80.3%	\$10,838,917
4247	Petroleum and Petroleum Products Merchant Wholesalers	\$651,653	6.3%	\$9,742,780	93.7%	\$10,394,433
3342	Communications Equipment Manufacturing	\$71,708	0.7%	\$10,248,526	99.3%	\$10,320,234
5621	Waste Collection	\$3,930,080	38.6%	\$6,255,710	61.4%	\$10,185,790
7132	Gambling Industries	\$535,498	5.3%	\$9,555,413	94.7%	\$10,090,911
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	\$3,830,000	38.0%	\$6,241,485	62.0%	\$10,071,485
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	\$0	0.0%	\$9,881,844	100.0%	\$9,881,844
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	\$0	0.0%	\$9,617,068	100.0%	\$9,617,068
3122	Tobacco Manufacturing	\$0	0.0%	\$9,492,102	100.0%	\$9,492,102
4232	Furniture and Home Furnishing Merchant Wholesalers	\$147,350	1.6%	\$9,254,349	98.4%	\$9,401,700
5629	Remediation and Other Waste Management Services	\$6,663,921	73.0%	\$2,467,156	27.0%	\$9,131,077
3113	Sugar and Confectionery Product Manufacturing	\$132,093	1.5%	\$8,654,230	98.5%	\$8,786,323
3272	Glass and Glass Product Manufacturing	\$4,631,868	53.0%	\$4,111,082	47.0%	\$8,742,949
4881	Support Activities for Air Transportation	\$768,127	9.0%	\$7,756,370	91.0%	\$8,524,496
7115	Independent Artists, Writers, and Performers	\$1,676,227	19.7%	\$6,842,642	80.3%	\$8,518,869
4532	Office Supplies, Stationery, and Gift Stores	\$6,533,468	77.1%	\$1,937,502	22.9%	\$8,470,970
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	\$729,592	8.7%	\$7,689,471	91.3%	\$8,419,063
5612	Facilities Support Services	\$0	0.0%	\$8,339,262	100.0%	\$8,339,262
4421	Furniture Stores	\$6,986,474	87.2%	\$1,026,614	12.8%	\$8,013,088
8123	Drycleaning and Laundry Services	\$2,558,190	32.9%	\$5,222,580	67.1%	\$7,780,769
5622	Waste Treatment and Disposal	\$1,668,476	21.5%	\$6,085,206	78.5%	\$7,753,682
5322	Consumer Goods Rental	\$3,095,463	40.4%	\$4,571,585	59.6%	\$7,667,048
3372	Office Furniture (including Fixtures) Manufacturing	\$677,426	8.9%	\$6,972,130	91.1%	\$7,649,556
1151	Support Activities for Crop Production	\$2,516,847	33.0%	\$5,119,285	67.0%	\$7,636,132
3366	Ship and Boat Building	\$0	0.0%	\$7,447,319	100.0%	\$7,447,319
8133	Social Advocacy Organizations	\$2,261,705	31.1%	\$5,000,002	68.9%	\$7,261,707
6116	Other Schools and Instruction	\$1,796,032	25.2%	\$5,336,456	74.8%	\$7,132,488
4883	Support Activities for Water Transportation	\$0	0.0%	\$7,105,881	100.0%	\$7,105,881
2379	Other Heavy and Civil Engineering Construction	\$5,027,842	70.8%	\$2,074,573	29.2%	\$7,102,414
3152	Cut and Sew Apparel Manufacturing	\$116,112	1.6%	\$6,939,305	98.4%	\$7,055,417
4422	Home Furnishings Stores	\$4,565,964	64.9%	\$2,469,416	35.1%	\$7,035,381
5179	Other Telecommunications	\$736,800	11.0%	\$5,968,595	89.0%	\$6,705,395



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8132	Grantmaking and Giving Services	\$4,686,879	69.9%	\$2,016,739	30.1%	\$6,703,618
7131	Amusement Parks and Arcades	\$24,302	0.4%	\$6,649,255	99.6%	\$6,673,557
7111	Performing Arts Companies	\$444,027	6.8%	\$6,055,473	93.2%	\$6,499,500
4452	Specialty Food Stores	\$3,127,275	48.6%	\$3,312,656	51.4%	\$6,439,931
7113	Promoters of Performing Arts, Sports, and Similar Events	\$1,438,087	22.8%	\$4,880,379	77.2%	\$6,318,466
3333	Commercial and Service Industry Machinery Manufacturing	\$1,110,354	17.7%	\$5,170,404	82.3%	\$6,280,758
2122	Metal Ore Mining	\$0	0.0%	\$6,195,846	100.0%	\$6,195,846
3352	Household Appliance Manufacturing	\$36,709	0.6%	\$6,138,888	99.4%	\$6,175,597
3369	Other Transportation Equipment Manufacturing	\$2,382,830	38.9%	\$3,742,757	61.1%	\$6,125,587
3325	Hardware Manufacturing	\$3,936,129	65.8%	\$2,046,878	34.2%	\$5,983,007
4853	Taxi and Limousine Service	\$882,152	14.8%	\$5,066,409	85.2%	\$5,948,560
4832	Inland Water Transportation	\$0	0.0%	\$5,734,765	100.0%	\$5,734,765
4483	Jewelry, Luggage, and Leather Goods Stores	\$4,993,394	87.6%	\$705,981	12.4%	\$5,699,375
4412	Other Motor Vehicle Dealers	\$4,221,235	74.5%	\$1,443,866	25.5%	\$5,665,101
4245	Farm Product Raw Material Merchant Wholesalers	\$1,054,796	18.8%	\$4,542,258	81.2%	\$5,597,054
8114	Personal and Household Goods Repair and Maintenance	\$3,726,695	67.2%	\$1,820,862	32.8%	\$5,547,556
4812	Nonscheduled Air Transportation	\$576,970	11.0%	\$4,675,729	89.0%	\$5,252,698
3326	Spring and Wire Product Manufacturing	\$980,754	19.2%	\$4,127,001	80.8%	\$5,107,754
6117	Educational Support Services	\$322,962	6.5%	\$4,672,799	93.5%	\$4,995,762
4533	Used Merchandise Stores	\$4,782,425	99.7%	\$13,354	0.3%	\$4,795,778
3133	Textile and Fabric Finishing and Fabric Coating Mills	\$0	0.0%	\$4,782,589	100.0%	\$4,782,589
3365	Railroad Rolling Stock Manufacturing	\$253,853	5.3%	\$4,501,300	94.7%	\$4,755,153
6243	Vocational Rehabilitation Services	\$2,362,237	49.9%	\$2,369,619	50.1%	\$4,731,856
8112	Electronic and Precision Equipment Repair and Maintenance	\$1,956,785	42.2%	\$2,679,876	57.8%	\$4,636,662
8122	Death Care Services	\$2,897,258	63.0%	\$1,700,384	37.0%	\$4,597,642
8134	Civic and Social Organizations	\$4,202,555	91.9%	\$370,073	8.1%	\$4,572,628
7121	Museums, Historical Sites, and Similar Institutions	\$93,859	2.1%	\$4,437,334	97.9%	\$4,531,193
4442	Lawn and Garden Equipment and Supplies Stores	\$240,587	5.4%	\$4,182,233	94.6%	\$4,422,819
2372	Land Subdivision	\$617,591	14.6%	\$3,614,555	85.4%	\$4,232,146
4884	Support Activities for Road Transportation	\$437,237	10.4%	\$3,753,293	89.6%	\$4,190,530
7224	Drinking Places (Alcoholic Beverages)	\$3,480,169	83.3%	\$697,568	16.7%	\$4,177,737
6115	Technical and Trade Schools	\$961,334	23.1%	\$3,201,317	76.9%	\$4,162,650
3141	Textile Furnishings Mills	\$207,520	5.0%	\$3,931,748	95.0%	\$4,139,269
6114	Business Schools and Computer and Management Training	\$1,673,216	40.6%	\$2,444,185	59.4%	\$4,117,401
8141	Private Households	\$1,171,391	28.6%	\$2,921,432	71.4%	\$4,092,823
4482	Shoe Stores	\$1,707,653	44.3%	\$2,146,767	55.7%	\$3,854,420
5122	Sound Recording Industries	\$483,189	12.8%	\$3,290,550	87.2%	\$3,773,739
4854	School and Employee Bus Transportation	\$1,032,876	27.4%	\$2,736,993	72.6%	\$3,769,869
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	\$94,561	2.5%	\$3,671,693	97.5%	\$3,766,253
3117	Seafood Product Preparation and Packaging	\$0	0.0%	\$3,765,468	100.0%	\$3,765,468
6222	Psychiatric and Substance Abuse Hospitals	\$0	0.0%	\$3,571,762	100.0%	\$3,571,762
3274	Lime and Gypsum Product Manufacturing	\$0	0.0%	\$3,504,304	100.0%	\$3,504,304
4453	Beer, Wine, and Liquor Stores	\$213,321	6.1%	\$3,261,267	93.9%	\$3,474,588
3351	Electric Lighting Equipment Manufacturing	\$29,989	1.0%	\$3,094,505	99.0%	\$3,124,494
6239	Other Residential Care Facilities	\$1,181,988	38.8%	\$1,863,843	61.2%	\$3,045,831

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6242	Community Food and Housing, and Emergency and Other Relief Services	\$619,958	20.8%	\$2,360,230	79.2%	\$2,980,188
3131	Fiber, Yarn, and Thread Mills	\$0	0.0%	\$2,940,343	100.0%	\$2,940,343
2213	Water, Sewage and Other Systems	\$663,469	22.9%	\$2,237,459	77.1%	\$2,900,928
3149	Other Textile Product Mills	\$326,148	11.4%	\$2,542,082	88.6%	\$2,868,230
4859	Other Transit and Ground Passenger Transportation	\$446,099	15.7%	\$2,395,927	84.3%	\$2,842,026
3322	Cutlery and Handtool Manufacturing	\$0	0.0%	\$2,822,846	100.0%	\$2,822,846
5323	General Rental Centers	\$897,406	32.1%	\$1,902,024	67.9%	\$2,799,430
3379	Other Furniture Related Product Manufacturing	\$503,680	18.6%	\$2,203,965	81.4%	\$2,707,645
4922	Local Messengers and Local Delivery	\$1,630,071	65.2%	\$871,430	34.8%	\$2,501,502
1131	Timber Tract Operations	\$239,892	9.9%	\$2,177,601	90.1%	\$2,417,493
7212	RV (Recreational Vehicle) Parks and Recreational Camps	\$262,077	11.3%	\$2,055,719	88.7%	\$2,317,795
5211	Monetary Authorities-Central Bank	\$0	0.0%	\$2,206,526	100.0%	\$2,206,526
3271	Clay Product and Refractory Manufacturing	\$0	0.0%	\$2,151,906	100.0%	\$2,151,906
4512	Book Stores and News Dealers	\$1,803,891	85.6%	\$303,180	14.4%	\$2,107,071
4531	Florists	\$1,717,683	88.1%	\$232,374	11.9%	\$1,950,058
4882	Support Activities for Rail Transportation	\$286,379	17.1%	\$1,386,035	82.9%	\$1,672,413
4851	Urban Transit Systems	\$0	0.0%	\$1,666,881	100.0%	\$1,666,881
6112	Junior Colleges	\$0	0.0%	\$1,649,673	100.0%	\$1,649,673
4542	Vending Machine Operators	\$1,327,516	92.1%	\$114,459	7.9%	\$1,441,974
1152	Support Activities for Animal Production	\$253,131	18.3%	\$1,130,308	81.7%	\$1,383,439
4862	Pipeline Transportation of Natural Gas	\$0	0.0%	\$1,339,528	100.0%	\$1,339,528
1141	Fishing	\$255,316	19.6%	\$1,046,810	80.4%	\$1,302,126
7213	Rooming and Boarding Houses	\$351,597	27.2%	\$942,634	72.8%	\$1,294,231
3343	Audio and Video Equipment Manufacturing	\$0	0.0%	\$1,233,563	100.0%	\$1,233,563
4889	Other Support Activities for Transportation	\$486,258	40.2%	\$723,742	59.8%	\$1,210,000
3169	Other Leather and Allied Product Manufacturing	\$0	0.0%	\$1,112,506	100.0%	\$1,112,506
3162	Footwear Manufacturing	\$211,768	19.5%	\$875,372	80.5%	\$1,087,140
5232	Securities and Commodity Exchanges	\$60,766	6.0%	\$944,756	94.0%	\$1,005,522
3346	Manufacturing and Reproducing Magnetic and Optical Media	\$0	0.0%	\$869,045	100.0%	\$869,045
4855	Charter Bus Industry	\$841,280	97.2%	\$24,101	2.8%	\$865,381
5174	Satellite Telecommunications	\$0	0.0%	\$841,970	100.0%	\$841,970
3159	Apparel Accessories and Other Apparel Manufacturing	\$24,603	3.3%	\$731,524	96.7%	\$756,127
1132	Forest Nurseries and Gathering of Forest Products	\$157,691	21.1%	\$589,016	78.9%	\$746,706
4872	Scenic and Sightseeing Transportation, Water	\$80,581	11.7%	\$605,859	88.3%	\$686,440
3151	Apparel Knitting Mills	\$29,380	4.3%	\$648,826	95.7%	\$678,206
4852	Interurban and Rural Bus Transportation	\$0	0.0%	\$638,618	100.0%	\$638,618
1153	Support Activities for Forestry	\$0	0.0%	\$626,873	100.0%	\$626,873
3161	Leather and Hide Tanning and Finishing	\$7,172	1.4%	\$509,337	98.6%	\$516,509
4871	Scenic and Sightseeing Transportation, Land	\$0	0.0%	\$471,459	100.0%	\$471,459
4861	Pipeline Transportation of Crude Oil	\$0	0.0%	\$446,063	100.0%	\$446,063
4869	Other Pipeline Transportation	\$0	0.0%	\$310,133	100.0%	\$310,133
4911	Postal Service	\$0	0.0%	\$163,151	100.0%	\$163,151
1142	Hunting and Trapping	\$42,995	30.9%	\$96,276	69.1%	\$139,271
4879	Scenic and Sightseeing Transportation, Other	\$0	0.0%	\$125,940	100.0%	\$125,940
<b>Totals:</b>		\$3,136,699,492	27.9%	\$8,125,590,055	72.1%	\$11,262,289,547

Source: Emsi, 2016.3

### Appendix C: Metro Region Subindustry Supply Chain Purchases, 2014

*\*This table is purchases made from subindustries, both inside and outside of the metro region, by metro region industries.*

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
1120	Animal Production and Aquaculture	\$34,468,140	8.6%	\$364,484,157	91.4%	\$398,952,297
5242	Agencies, Brokerages, and Other Insurance Related Activities	\$59,282,207	21.3%	\$219,438,818	78.7%	\$278,721,025
5511	Management of Companies and Enterprises	\$24,226,071	9.3%	\$236,723,706	90.7%	\$260,949,777
9036	Education and Hospitals (Local Government)	\$174,038,767	91.7%	\$15,728,793	8.3%	\$189,767,560
3115	Dairy Product Manufacturing	\$99,122,274	54.5%	\$82,704,124	45.5%	\$181,826,398
5311	Lessors of Real Estate	\$73,153,238	47.0%	\$82,333,133	53.0%	\$155,486,371
5241	Insurance Carriers	\$87,835,888	57.4%	\$65,149,356	42.6%	\$152,985,243
3241	Petroleum and Coal Products Manufacturing	\$1,504,356	1.0%	\$150,352,805	99.0%	\$151,857,161
3221	Pulp, Paper, and Paperboard Mills	\$29,553,966	23.4%	\$96,797,056	76.6%	\$126,351,022
3313	Alumina and Aluminum Production and Processing	\$20,285,849	20.2%	\$80,259,687	79.8%	\$100,545,536
3311	Iron and Steel Mills and Ferroalloy Manufacturing	\$0	0.0%	\$98,282,834	100.0%	\$98,282,834
4841	General Freight Trucking	\$35,085,007	41.8%	\$48,868,961	58.2%	\$83,953,969
3251	Basic Chemical Manufacturing	\$4,634,334	5.8%	\$74,937,156	94.2%	\$79,571,490
4251	Wholesale Electronic Markets and Agents and Brokers	\$6,069,082	7.7%	\$72,752,470	92.3%	\$78,821,551
5313	Activities Related to Real Estate	\$14,877,351	19.9%	\$59,961,063	80.1%	\$74,838,414
5221	Depository Credit Intermediation	\$27,227,173	37.1%	\$46,230,340	62.9%	\$73,457,512
3222	Converted Paper Product Manufacturing	\$12,102,041	17.5%	\$57,249,679	82.5%	\$69,351,720
3211	Sawmills and Wood Preservation	\$2,412,305	3.5%	\$65,585,784	96.5%	\$67,998,089
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	\$3,981,223	5.9%	\$62,989,004	94.1%	\$66,970,227
3261	Plastics Product Manufacturing	\$1,310,695	2.0%	\$64,575,714	98.0%	\$65,886,409
5416	Management, Scientific, and Technical Consulting Services	\$13,013,170	21.1%	\$48,791,048	78.9%	\$61,804,218
5239	Other Financial Investment Activities	\$5,320,505	9.7%	\$49,767,289	90.3%	\$55,087,794
3363	Motor Vehicle Parts Manufacturing	\$13,944,040	25.4%	\$40,886,763	74.6%	\$54,830,803
5613	Employment Services	\$17,675,450	32.5%	\$36,661,487	67.5%	\$54,336,938
5411	Legal Services	\$25,230,524	46.5%	\$29,010,500	53.5%	\$54,241,024
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	\$1,175,282	2.2%	\$51,857,894	97.8%	\$53,033,176
5312	Offices of Real Estate Agents and Brokers	\$15,953,159	30.5%	\$36,329,485	69.5%	\$52,282,644
3323	Architectural and Structural Metals Manufacturing	\$19,858,478	38.3%	\$32,032,831	61.7%	\$51,891,309
5617	Services to Buildings and Dwellings	\$19,272,278	38.6%	\$30,716,294	61.4%	\$49,988,572
2211	Electric Power Generation, Transmission and Distribution	\$13,086,680	26.2%	\$36,856,000	73.8%	\$49,942,681
5413	Architectural, Engineering, and Related Services	\$25,529,268	53.6%	\$22,069,709	46.4%	\$47,598,978
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$499,304	1.1%	\$43,049,163	98.9%	\$43,548,467
7225	Restaurants and Other Eating Places	\$30,389,146	70.4%	\$12,783,334	29.6%	\$43,172,480
5415	Computer Systems Design and Related Services	\$5,744,956	13.4%	\$36,999,024	86.6%	\$42,743,980
5171	Wired Telecommunications Carriers	\$19,188,959	45.6%	\$22,934,027	54.4%	\$42,122,987

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5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	\$22,787,225	54.3%	\$19,200,174	45.7%	\$41,987,399
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$24,004,976	57.5%	\$17,744,579	42.5%	\$41,749,555
4821	Rail Transportation	\$2,195,592	5.4%	\$38,614,679	94.6%	\$40,810,271
5418	Advertising, Public Relations, and Related Services	\$5,076,643	12.9%	\$34,369,732	87.1%	\$39,446,375
4931	Warehousing and Storage	\$5,453,402	14.8%	\$31,338,099	85.2%	\$36,791,501
4244	Grocery and Related Product Merchant Wholesalers	\$6,378,601	17.5%	\$30,027,229	82.5%	\$36,405,831
3219	Other Wood Product Manufacturing	\$21,245,798	59.2%	\$14,621,938	40.8%	\$35,867,735
3111	Animal Food Manufacturing	\$1,578,631	4.5%	\$33,467,937	95.5%	\$35,046,568
3314	Nonferrous Metal (except Aluminum) Production and Processing	\$0	0.0%	\$34,889,106	100.0%	\$34,889,106
2212	Natural Gas Distribution	\$0	0.0%	\$33,241,109	100.0%	\$33,241,109
9039	Local Government, Excluding Education and Hospitals	\$32,307,440	100.0%	\$0	0.0%	\$32,307,440
5419	Other Professional, Scientific, and Technical Services	\$5,618,652	17.8%	\$26,032,496	82.2%	\$31,651,148
3344	Semiconductor and Other Electronic Component Manufacturing	\$0	0.0%	\$30,519,067	100.0%	\$30,519,067
5231	Securities and Commodity Contracts Intermediation and Brokerage	\$5,045,516	16.7%	\$25,160,432	83.3%	\$30,205,948
4842	Specialized Freight Trucking	\$13,204,133	44.0%	\$16,835,311	56.0%	\$30,039,444
1110	Crop Production	\$1,350,676	4.5%	\$28,449,629	95.5%	\$29,800,305
3255	Paint, Coating, and Adhesive Manufacturing	\$2,204,128	7.5%	\$27,172,099	92.5%	\$29,376,227
3273	Cement and Concrete Product Manufacturing	\$9,083,625	31.7%	\$19,599,368	68.3%	\$28,682,993
5614	Business Support Services	\$4,028,111	15.1%	\$22,638,902	84.9%	\$26,667,013
2123	Nonmetallic Mineral Mining and Quarrying	\$4,162,906	15.8%	\$22,259,037	84.2%	\$26,421,943
3329	Other Fabricated Metal Product Manufacturing	\$5,576,857	21.2%	\$20,689,468	78.8%	\$26,266,325
4921	Couriers and Express Delivery Services	\$17,774,748	68.4%	\$8,203,036	31.6%	\$25,977,784
2382	Building Equipment Contractors	\$18,079,100	71.9%	\$7,063,467	28.1%	\$25,142,567
9012	Federal Government, Military	\$0	0.0%	\$24,941,432	100.0%	\$24,941,432
5182	Data Processing, Hosting, and Related Services	\$915,007	3.8%	\$23,411,280	96.2%	\$24,326,287
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	\$518,193	2.1%	\$23,704,340	97.9%	\$24,222,534
3254	Pharmaceutical and Medicine Manufacturing	\$460,329	2.0%	\$23,102,637	98.0%	\$23,562,966
5191	Other Information Services	\$139,151	0.6%	\$23,410,955	99.4%	\$23,550,106
9029	State Government, Excluding Education and Hospitals	\$989,844	4.2%	\$22,446,134	95.8%	\$23,435,978
5222	Nondepository Credit Intermediation	\$5,545,233	23.7%	\$17,846,154	76.3%	\$23,391,387
3312	Steel Product Manufacturing from Purchased Steel	\$0	0.0%	\$23,271,558	100.0%	\$23,271,558
3112	Grain and Oilseed Milling	\$0	0.0%	\$23,063,774	100.0%	\$23,063,774
3315	Foundries	\$0	0.0%	\$22,561,443	100.0%	\$22,561,443
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	\$7,781,931	34.7%	\$14,612,435	65.3%	\$22,394,366
3328	Coating, Engraving, Heat Treating, and Allied Activities	\$4,688,656	21.0%	\$17,586,822	79.0%	\$22,275,478
3279	Other Nonmetallic Mineral Product Manufacturing	\$6,671,296	31.4%	\$14,601,212	68.6%	\$21,272,508
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing	\$0	0.0%	\$20,985,419	100.0%	\$20,985,419



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2121	Coal Mining	\$0	0.0%	\$20,782,572	100.0%	\$20,782,572
3231	Printing and Related Support Activities	\$603,235	2.9%	\$20,159,322	97.1%	\$20,762,558
4811	Scheduled Air Transportation	\$1,841,753	8.9%	\$18,912,411	91.1%	\$20,754,165
3391	Medical Equipment and Supplies Manufacturing	\$333,517	1.6%	\$20,021,502	98.4%	\$20,355,019
3353	Electrical Equipment Manufacturing	\$3,154,699	15.5%	\$17,189,285	84.5%	\$20,343,984
4242	Drugs and Druggists' Sundries Merchant Wholesalers	\$41,611	0.2%	\$19,672,251	99.8%	\$19,713,862
3339	Other General Purpose Machinery Manufacturing	\$1,327,121	6.8%	\$18,308,852	93.2%	\$19,635,973
3321	Forging and Stamping	\$4,578,253	23.8%	\$14,630,449	76.2%	\$19,208,701
4239	Miscellaneous Durable Goods Merchant Wholesalers	\$3,840,686	20.6%	\$14,832,249	79.4%	\$18,672,935
9011	Federal Government, Civilian	\$7,611,313	41.3%	\$10,817,895	58.7%	\$18,429,208
5151	Radio and Television Broadcasting	\$12,152,109	66.6%	\$6,086,376	33.4%	\$18,238,485
1133	Logging	\$1,667,810	9.2%	\$16,535,120	90.8%	\$18,202,929
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$4,824,291	27.6%	\$12,646,236	72.4%	\$17,470,527
3259	Other Chemical Product and Preparation Manufacturing	\$0	0.0%	\$17,150,720	100.0%	\$17,150,720
5611	Office Administrative Services	\$1,149,270	6.8%	\$15,782,763	93.2%	\$16,932,033
5111	Newspaper, Periodical, Book, and Directory Publishers	\$6,535,815	38.9%	\$10,268,573	61.1%	\$16,804,388
5619	Other Support Services	\$4,259,954	25.6%	\$12,397,449	74.4%	\$16,657,402
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	\$2,338,311	14.1%	\$14,214,473	85.9%	\$16,552,783
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	\$5,778,408	36.7%	\$9,948,524	63.3%	\$15,726,932
3324	Boiler, Tank, and Shipping Container Manufacturing	\$6,390,825	40.9%	\$9,233,218	59.1%	\$15,624,042
5172	Wireless Telecommunications Carriers (except Satellite)	\$751,796	4.9%	\$14,626,089	95.1%	\$15,377,885
7211	Traveler Accommodation	\$6,426,093	42.8%	\$8,600,854	57.2%	\$15,026,947
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	\$130,266	0.9%	\$14,152,171	99.1%	\$14,282,437
3116	Animal Slaughtering and Processing	\$52,568	0.4%	\$14,098,116	99.6%	\$14,150,684
5616	Investigation and Security Services	\$4,892,367	35.7%	\$8,828,443	64.3%	\$13,720,810
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	\$0	0.0%	\$13,651,574	100.0%	\$13,651,574
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	\$4,581,082	34.1%	\$8,868,167	65.9%	\$13,449,248
6215	Medical and Diagnostic Laboratories	\$8,062,637	60.4%	\$5,296,679	39.6%	\$13,359,316
9026	Education and Hospitals (State Government)	\$1,877,861	14.2%	\$11,367,775	85.8%	\$13,245,636
3359	Other Electrical Equipment and Component Manufacturing	\$81,872	0.6%	\$12,639,865	99.4%	\$12,721,737
4885	Freight Transportation Arrangement	\$1,309,016	10.5%	\$11,163,457	89.5%	\$12,472,473
5615	Travel Arrangement and Reservation Services	\$2,889,933	23.4%	\$9,452,471	76.6%	\$12,342,404
8111	Automotive Repair and Maintenance	\$7,820,738	66.0%	\$4,023,014	34.0%	\$11,843,752
3119	Other Food Manufacturing	\$732,101	6.3%	\$10,865,644	93.7%	\$11,597,745
2362	Nonresidential Building Construction	\$5,899,102	52.2%	\$5,393,595	47.8%	\$11,292,697
3399	Other Miscellaneous Manufacturing	\$687,429	6.1%	\$10,574,467	93.9%	\$11,261,896
3132	Fabric Mills	\$0	0.0%	\$11,133,711	100.0%	\$11,133,711
4248	Beer, Wine, and Distilled Alcoholic Beverage	\$5,244,909	48.2%	\$5,627,195	51.8%	\$10,872,104

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	Merchant Wholesalers					
4411	Automobile Dealers	\$7,854,579	72.8%	\$2,933,538	27.2%	\$10,788,117
4233	Lumber and Other Construction Materials Merchant Wholesalers	\$7,634,663	71.6%	\$3,034,574	28.4%	\$10,669,237
5223	Activities Related to Credit Intermediation	\$124,830	1.2%	\$10,442,118	98.8%	\$10,566,948
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	\$3,754,840	38.1%	\$6,091,791	61.9%	\$9,846,631
2361	Residential Building Construction	\$4,841,171	49.2%	\$4,989,073	50.8%	\$9,830,244
5414	Specialized Design Services	\$858,194	8.9%	\$8,814,026	91.1%	\$9,672,220
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	\$87,212	0.9%	\$9,463,618	99.1%	\$9,550,830
4246	Chemical and Allied Products Merchant Wholesalers	\$2,246,871	23.6%	\$7,256,786	76.4%	\$9,503,657
2111	Oil and Gas Extraction	\$186,631	2.0%	\$9,282,152	98.0%	\$9,468,783
3262	Rubber Product Manufacturing	\$26,173	0.3%	\$9,276,121	99.7%	\$9,302,294
3332	Industrial Machinery Manufacturing	\$1,891,234	20.4%	\$7,361,768	79.6%	\$9,253,002
2389	Other Specialty Trade Contractors	\$3,702,407	40.4%	\$5,456,745	59.6%	\$9,159,152
2383	Building Finishing Contractors	\$4,354,980	49.0%	\$4,533,964	51.0%	\$8,888,944
5621	Waste Collection	\$3,308,664	39.4%	\$5,081,961	60.6%	\$8,390,625
5612	Facilities Support Services	\$0	0.0%	\$8,208,568	100.0%	\$8,208,568
8139	Business, Professional, Labor, Political, and Similar Organizations	\$2,691,301	33.8%	\$5,282,430	66.2%	\$7,973,731
2381	Foundation, Structure, and Building Exterior Contractors	\$2,616,144	33.1%	\$5,286,624	66.9%	\$7,902,768
6113	Colleges, Universities, and Professional Schools	\$902,065	11.5%	\$6,957,029	88.5%	\$7,859,094
4881	Support Activities for Air Transportation	\$709,698	9.1%	\$7,114,991	90.9%	\$7,824,689
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	\$3,689,695	48.2%	\$3,970,399	51.8%	\$7,660,094
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	\$17,277	0.2%	\$7,573,789	99.8%	\$7,591,065
5121	Motion Picture and Video Industries	\$552,518	7.3%	\$6,991,273	92.7%	\$7,543,792
5629	Remediation and Other Waste Management Services	\$5,543,266	73.8%	\$1,971,384	26.2%	\$7,514,650
3272	Glass and Glass Product Manufacturing	\$4,013,413	53.6%	\$3,471,593	46.4%	\$7,485,007
5152	Cable and Other Subscription Programming	\$0	0.0%	\$7,355,622	100.0%	\$7,355,622
3335	Metalworking Machinery Manufacturing	\$468,028	6.4%	\$6,860,060	93.6%	\$7,328,088
5321	Automotive Equipment Rental and Leasing	\$3,492,367	49.2%	\$3,598,934	50.8%	\$7,091,301
7115	Independent Artists, Writers, and Performers	\$1,421,555	20.1%	\$5,638,127	79.9%	\$7,059,682
4241	Paper and Paper Product Merchant Wholesalers	\$496,046	7.0%	\$6,541,178	93.0%	\$7,037,224
3121	Beverage Manufacturing	\$128,765	1.9%	\$6,723,927	98.1%	\$6,852,692
4247	Petroleum and Petroleum Products Merchant Wholesalers	\$433,473	6.5%	\$6,256,712	93.5%	\$6,690,185
4883	Support Activities for Water Transportation	\$0	0.0%	\$6,523,260	100.0%	\$6,523,260
1151	Support Activities for Crop Production	\$2,121,991	33.2%	\$4,269,805	66.8%	\$6,391,796
5622	Waste Treatment and Disposal	\$1,403,420	22.0%	\$4,977,336	78.0%	\$6,380,756
2371	Utility System Construction	\$1,064,866	16.9%	\$5,245,151	83.1%	\$6,310,018
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	\$695,120	11.2%	\$5,520,823	88.8%	\$6,215,944
3364	Aerospace Product and Parts Manufacturing	\$0	0.0%	\$6,192,173	100.0%	\$6,192,173

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4232	Furniture and Home Furnishing Merchant Wholesalers	\$97,934	1.6%	\$5,950,652	98.4%	\$6,048,586
6219	Other Ambulatory Health Care Services	\$2,153,324	36.1%	\$3,808,282	63.9%	\$5,961,606
3331	Agriculture, Construction, and Mining Machinery Manufacturing	\$245,549	4.1%	\$5,713,187	95.9%	\$5,958,737
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	\$0	0.0%	\$5,705,533	100.0%	\$5,705,533
4461	Health and Personal Care Stores	\$2,826,351	49.6%	\$2,866,494	50.4%	\$5,692,845
8123	Drycleaning and Laundry Services	\$1,949,721	34.3%	\$3,731,066	65.7%	\$5,680,787
3325	Hardware Manufacturing	\$3,642,223	66.1%	\$1,863,819	33.9%	\$5,506,042
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	\$363,532	6.6%	\$5,128,765	93.4%	\$5,492,297
7112	Spectator Sports	\$368,733	6.9%	\$4,950,864	93.1%	\$5,319,598
5259	Other Investment Pools and Funds	\$1,322,581	25.1%	\$3,944,848	74.9%	\$5,267,429
5112	Software Publishers	\$16,472	0.3%	\$5,238,273	99.7%	\$5,254,745
4441	Building Material and Supplies Dealers	\$4,020,570	81.3%	\$925,677	18.7%	\$4,946,247
3326	Spring and Wire Product Manufacturing	\$936,296	19.3%	\$3,919,160	80.7%	\$4,855,455
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	\$425,489	9.2%	\$4,184,949	90.8%	\$4,610,438
2122	Metal Ore Mining	\$0	0.0%	\$4,386,212	100.0%	\$4,386,212
3133	Textile and Fabric Finishing and Fabric Coating Mills	\$0	0.0%	\$4,382,888	100.0%	\$4,382,888
8112	Electronic and Precision Equipment Repair and Maintenance	\$1,827,787	42.6%	\$2,462,896	57.4%	\$4,290,682
3342	Communications Equipment Manufacturing	\$45,337	1.1%	\$4,120,278	98.9%	\$4,165,615
2373	Highway, Street, and Bridge Construction	\$2,294,764	55.2%	\$1,862,093	44.8%	\$4,156,857
5417	Scientific Research and Development Services	\$122,791	3.0%	\$3,987,129	97.0%	\$4,109,921
8114	Personal and Household Goods Repair and Maintenance	\$2,820,197	69.6%	\$1,231,057	30.4%	\$4,051,255
4884	Support Activities for Road Transportation	\$404,961	10.5%	\$3,441,035	89.5%	\$3,845,996
4245	Farm Product Raw Material Merchant Wholesalers	\$698,536	19.4%	\$2,894,523	80.6%	\$3,593,059
3118	Bakeries and Tortilla Manufacturing	\$44,626	1.3%	\$3,460,779	98.7%	\$3,505,405
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	\$55,867	1.6%	\$3,392,546	98.4%	\$3,448,413
3274	Lime and Gypsum Product Manufacturing	\$0	0.0%	\$3,425,121	100.0%	\$3,425,121
4832	Inland Water Transportation	\$0	0.0%	\$3,402,560	100.0%	\$3,402,560
8129	Other Personal Services	\$1,232,094	37.0%	\$2,098,117	63.0%	\$3,330,210
7139	Other Amusement and Recreation Industries	\$2,057,851	62.6%	\$1,228,992	37.4%	\$3,286,843
3361	Motor Vehicle Manufacturing	\$0	0.0%	\$3,243,181	100.0%	\$3,243,181
4481	Clothing Stores	\$1,677,557	52.3%	\$1,532,090	47.7%	\$3,209,647
4431	Electronics and Appliance Stores	\$1,851,896	60.0%	\$1,236,269	40.0%	\$3,088,165
4541	Electronic Shopping and Mail-Order Houses	\$58,603	1.9%	\$3,019,046	98.1%	\$3,077,649
4413	Automotive Parts, Accessories, and Tire Stores	\$2,204,300	74.6%	\$751,625	25.4%	\$2,955,924
3366	Ship and Boat Building	\$0	0.0%	\$2,902,913	100.0%	\$2,902,913
3333	Commercial and Service Industry Machinery Manufacturing	\$575,289	20.0%	\$2,295,447	80.0%	\$2,870,736
4451	Grocery Stores	\$2,137,705	74.9%	\$715,949	25.1%	\$2,853,654
3341	Computer and Peripheral Equipment Manufacturing	\$27,772	1.0%	\$2,824,321	99.0%	\$2,852,093
3131	Fiber, Yarn, and Thread Mills	\$0	0.0%	\$2,664,561	100.0%	\$2,664,561
3369	Other Transportation Equipment Manufacturing	\$1,152,556	43.3%	\$1,508,279	56.7%	\$2,660,835



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3113	Sugar and Confectionery Product Manufacturing	\$42,216	1.6%	\$2,599,189	98.4%	\$2,641,405
5179	Other Telecommunications	\$311,502	12.1%	\$2,258,559	87.9%	\$2,570,060
4471	Gasoline Stations	\$1,040,894	41.0%	\$1,499,880	59.0%	\$2,540,774
4812	Nonscheduled Air Transportation	\$295,186	11.7%	\$2,220,707	88.3%	\$2,515,893
4853	Taxi and Limousine Service	\$402,702	16.4%	\$2,059,474	83.6%	\$2,462,176
4922	Local Messengers and Local Delivery	\$1,602,334	65.3%	\$851,511	34.7%	\$2,453,844
1131	Timber Tract Operations	\$239,732	9.9%	\$2,176,079	90.1%	\$2,415,811
8134	Civic and Social Organizations	\$2,302,882	96.2%	\$89,885	3.8%	\$2,392,767
4539	Other Miscellaneous Store Retailers	\$1,794,689	76.5%	\$552,840	23.5%	\$2,347,529
6221	General Medical and Surgical Hospitals	\$2,305,426	99.6%	\$9,791	0.4%	\$2,315,217
3117	Seafood Product Preparation and Packaging	\$0	0.0%	\$2,283,545	100.0%	\$2,283,545
3365	Railroad Rolling Stock Manufacturing	\$121,505	5.6%	\$2,059,461	94.4%	\$2,180,965
3351	Electric Lighting Equipment Manufacturing	\$21,251	1.0%	\$2,016,801	99.0%	\$2,038,052
4543	Direct Selling Establishments	\$1,209,958	59.4%	\$826,593	40.6%	\$2,036,551
4529	Other General Merchandise Stores	\$1,864,765	92.2%	\$158,077	7.8%	\$2,022,842
3372	Office Furniture (including Fixtures) Manufacturing	\$147,101	7.5%	\$1,825,702	92.5%	\$1,972,803
7223	Special Food Services	\$400,148	21.4%	\$1,467,848	78.6%	\$1,867,996
2131	Support Activities for Mining	\$0	0.0%	\$1,832,977	100.0%	\$1,832,977
4511	Sporting Goods, Hobby, and Musical Instrument Stores	\$1,282,573	74.1%	\$448,273	25.9%	\$1,730,846
5322	Consumer Goods Rental	\$767,334	44.5%	\$955,372	55.5%	\$1,722,706
2379	Other Heavy and Civil Engineering Construction	\$1,325,775	78.3%	\$368,142	21.7%	\$1,693,917
7113	Promoters of Performing Arts, Sports, and Similar Events	\$424,196	25.7%	\$1,228,224	74.3%	\$1,652,420
4854	School and Employee Bus Transportation	\$472,056	30.2%	\$1,090,645	69.8%	\$1,562,701
4882	Support Activities for Rail Transportation	\$265,236	17.3%	\$1,269,676	82.7%	\$1,534,911
3271	Clay Product and Refractory Manufacturing	\$0	0.0%	\$1,405,560	100.0%	\$1,405,560
3362	Motor Vehicle Body and Trailer Manufacturing	\$0	0.0%	\$1,392,354	100.0%	\$1,392,354
3149	Other Textile Product Mills	\$164,323	12.1%	\$1,194,759	87.9%	\$1,359,082
3322	Cutlery and Handtool Manufacturing	\$0	0.0%	\$1,336,150	100.0%	\$1,336,150
4521	Department Stores	\$1,056,446	80.9%	\$250,009	19.1%	\$1,306,455
5251	Insurance and Employee Benefit Funds	\$0	0.0%	\$1,305,788	100.0%	\$1,305,788
4532	Office Supplies, Stationery, and Gift Stores	\$1,039,122	81.4%	\$236,760	18.6%	\$1,275,882
3352	Household Appliance Manufacturing	\$7,090	0.6%	\$1,211,876	99.4%	\$1,218,966
4421	Furniture Stores	\$1,158,426	96.2%	\$45,322	3.8%	\$1,203,747
4859	Other Transit and Ground Passenger Transportation	\$208,000	17.4%	\$988,062	82.6%	\$1,196,063
1152	Support Activities for Animal Production	\$213,992	18.5%	\$944,751	81.5%	\$1,158,743
6116	Other Schools and Instruction	\$326,866	28.5%	\$818,948	71.5%	\$1,145,815
4889	Other Support Activities for Transportation	\$450,176	40.5%	\$660,104	59.5%	\$1,110,280
1141	Fishing	\$220,463	20.0%	\$882,177	80.0%	\$1,102,639
4862	Pipeline Transportation of Natural Gas	\$0	0.0%	\$1,081,658	100.0%	\$1,081,658
4412	Other Motor Vehicle Dealers	\$864,091	81.2%	\$200,710	18.8%	\$1,064,801
2213	Water, Sewage and Other Systems	\$262,523	24.8%	\$795,136	75.2%	\$1,057,659
4422	Home Furnishings Stores	\$756,692	72.1%	\$293,045	27.9%	\$1,049,737
2372	Land Subdivision	\$173,848	17.1%	\$844,581	82.9%	\$1,018,429

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7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	\$27,968	2.8%	\$957,062	97.2%	\$985,029
6211	Offices of Physicians	\$856,130	88.7%	\$109,373	11.3%	\$965,504
3152	Cut and Sew Apparel Manufacturing	\$16,888	1.9%	\$881,667	98.1%	\$898,555
5211	Monetary Authorities-Central Bank	\$0	0.0%	\$892,989	100.0%	\$892,989
4483	Jewelry, Luggage, and Leather Goods Stores	\$768,463	90.2%	\$83,731	9.8%	\$852,194
7111	Performing Arts Companies	\$66,947	7.9%	\$783,919	92.1%	\$850,867
6117	Educational Support Services	\$59,562	7.4%	\$743,659	92.6%	\$803,221
1132	Forest Nurseries and Gathering of Forest Products	\$157,535	21.1%	\$588,422	78.9%	\$745,957
5122	Sound Recording Industries	\$105,360	14.3%	\$629,109	85.7%	\$734,468
4533	Used Merchandise Stores	\$716,496	99.8%	\$1,146	0.2%	\$717,643
4851	Urban Transit Systems	\$0	0.0%	\$689,397	100.0%	\$689,397
7224	Drinking Places (Alcoholic Beverages)	\$635,971	93.9%	\$41,657	6.1%	\$677,628
6115	Technical and Trade Schools	\$163,675	24.5%	\$505,010	75.5%	\$668,685
3346	Manufacturing and Reproducing Magnetic and Optical Media	\$0	0.0%	\$668,516	100.0%	\$668,516
6114	Business Schools and Computer and Management Training	\$307,500	46.5%	\$354,211	53.5%	\$661,711
4442	Lawn and Garden Equipment and Supplies Stores	\$39,860	6.0%	\$619,935	94.0%	\$659,795
4872	Scenic and Sightseeing Transportation, Water	\$74,666	11.8%	\$555,617	88.2%	\$630,284
5323	General Rental Centers	\$224,815	35.8%	\$404,011	64.2%	\$628,826
5232	Securities and Commodity Exchanges	\$38,123	6.4%	\$558,614	93.6%	\$596,737
4482	Shoe Stores	\$287,058	49.6%	\$291,732	50.4%	\$578,790
6213	Offices of Other Health Practitioners	\$458,040	79.5%	\$118,333	20.5%	\$576,373
7212	RV (Recreational Vehicle) Parks and Recreational Camps	\$69,754	12.8%	\$475,682	87.2%	\$545,435
1153	Support Activities for Forestry	\$0	0.0%	\$524,266	100.0%	\$524,266
7131	Amusement Parks and Arcades	\$1,872	0.4%	\$440,690	99.6%	\$442,562
4871	Scenic and Sightseeing Transportation, Land	\$0	0.0%	\$432,523	100.0%	\$432,523
3141	Textile Furnishings Mills	\$65,603	17.0%	\$320,133	83.0%	\$385,735
6214	Outpatient Care Centers	\$299,153	80.3%	\$73,195	19.7%	\$372,349
8121	Personal Care Services	\$240,661	65.0%	\$129,449	35.0%	\$370,110
4861	Pipeline Transportation of Crude Oil	\$0	0.0%	\$359,994	100.0%	\$359,994
4855	Charter Bus Industry	\$354,676	99.0%	\$3,529	1.0%	\$358,205
4452	Specialty Food Stores	\$173,858	53.8%	\$149,106	46.2%	\$322,964
6216	Home Health Care Services	\$134,330	41.8%	\$187,118	58.2%	\$321,448
5174	Satellite Telecommunications	\$0	0.0%	\$321,144	100.0%	\$321,144
4512	Book Stores and News Dealers	\$272,399	86.4%	\$42,908	13.6%	\$315,307
7213	Rooming and Boarding Houses	\$92,497	30.7%	\$208,378	69.3%	\$300,874
4531	Florists	\$282,087	96.9%	\$9,043	3.1%	\$291,130
6111	Elementary and Secondary Schools	\$66,254	25.0%	\$199,210	75.0%	\$265,464
4852	Interurban and Rural Bus Transportation	\$0	0.0%	\$264,235	100.0%	\$264,235
3379	Other Furniture Related Product Manufacturing	\$50,835	19.8%	\$205,457	80.2%	\$256,292
4869	Other Pipeline Transportation	\$0	0.0%	\$250,178	100.0%	\$250,178
6112	Junior Colleges	\$0	0.0%	\$226,155	100.0%	\$226,155
4542	Vending Machine Operators	\$212,798	99.1%	\$1,959	0.9%	\$214,757
3169	Other Leather and Allied Product Manufacturing	\$0	0.0%	\$200,957	100.0%	\$200,957

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3162	Footwear Manufacturing	\$41,651	21.1%	\$155,714	78.9%	\$197,365
6231	Nursing Care Facilities (Skilled Nursing Facilities)	\$143,244	75.7%	\$45,864	24.3%	\$189,108
4453	Beer, Wine, and Liquor Stores	\$12,178	7.0%	\$162,703	93.0%	\$174,881
3122	Tobacco Manufacturing	\$0	0.0%	\$140,515	100.0%	\$140,515
6212	Offices of Dentists	\$133,414	97.6%	\$3,217	2.4%	\$136,631
4911	Postal Service	\$0	0.0%	\$124,803	100.0%	\$124,803
1142	Hunting and Trapping	\$37,119	31.5%	\$80,799	68.5%	\$117,918
4879	Scenic and Sightseeing Transportation, Other	\$0	0.0%	\$115,405	100.0%	\$115,405
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	\$0	0.0%	\$106,385	100.0%	\$106,385
3159	Apparel Accessories and Other Apparel Manufacturing	\$3,550	3.7%	\$92,287	96.3%	\$95,837
3161	Leather and Hide Tanning and Finishing	\$1,409	1.5%	\$92,153	98.5%	\$93,562
3343	Audio and Video Equipment Manufacturing	\$0	0.0%	\$86,801	100.0%	\$86,801
3151	Apparel Knitting Mills	\$4,251	4.9%	\$81,696	95.1%	\$85,947
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	\$44,596	54.5%	\$37,287	45.5%	\$81,883
6244	Child Day Care Services	\$72,699	97.4%	\$1,913	2.6%	\$74,612
7132	Gambling Industries	\$4,600	6.2%	\$69,878	93.8%	\$74,478
8131	Religious Organizations	\$49,356	75.1%	\$16,368	24.9%	\$65,724
6241	Individual and Family Services	\$55,964	85.4%	\$9,601	14.6%	\$65,565
7121	Museums, Historical Sites, and Similar Institutions	\$1,338	2.4%	\$53,948	97.6%	\$55,286
8133	Social Advocacy Organizations	\$23,167	44.7%	\$28,705	55.3%	\$51,872
8132	Grantmaking and Giving Services	\$40,432	84.4%	\$7,454	15.6%	\$47,886
6222	Psychiatric and Substance Abuse Hospitals	\$0	0.0%	\$38,419	100.0%	\$38,419
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	\$5,598	24.4%	\$17,377	75.6%	\$22,975
8122	Death Care Services	\$6,902	72.3%	\$2,641	27.7%	\$9,543
6243	Vocational Rehabilitation Services	\$3,885	59.3%	\$2,669	40.7%	\$6,554
6239	Other Residential Care Facilities	\$3,061	48.0%	\$3,322	52.0%	\$6,383
6242	Community Food and Housing, and Emergency and Other Relief Services	\$1,028	24.7%	\$3,129	75.3%	\$4,157

Source: Emsi, 2016.3

**Appendix D: Metro Region Clusters**

**Production Technology and Heavy Machinery: 72**

NAICS	Industry	Jobs	Score
333120	Construction Machinery Manufacturing	122	35
333241	Food Product Machinery Manufacturing	183	45
333249	Other Industrial Machinery Manufacturing	243	41
333318	Other Commercial and Service Industry Machinery Manufacturing	251	46
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	1,083	100
333922	Conveyor and Conveying Equipment Manufacturing	27	32
333995	Fluid Power Cylinder and Actuator Manufacturing	181	40
336510	Railroad Rolling Stock Manufacturing	25	39

**Business Services: 71**

NAICS	Industry	Jobs	Score
485310	Taxi Service	49	24
541310	Architectural Services	52	32
541330	Engineering Services	357	43
541511	Custom Computer Programming Services	54	36
541512	Computer Systems Design Services	108	32
541611	Administrative Management and General Management Consulting Services	119	37
541990	All Other Professional, Scientific, and Technical Services	10	21
551114	Corporate, Subsidiary, and Regional Managing Offices	1,451	88

**Electric Power Generation and Transmission: 65**

NAICS	Industry	Jobs	Score
221112	Fossil Fuel Electric Power Generation	303	65

**Local Education and Training: 60**

NAICS	Industry	Jobs	Score
611110	Elementary and Secondary Schools	17	22
611610	Fine Arts Schools	25	23
624310	Vocational Rehabilitation Services	75	27
903611	Elementary and Secondary Schools (Local Government)	2,782	62

**Upstream Chemical Products: 59**

NAICS	Industry	Jobs	Score
325194	Cyclic Crude, Intermediate, and Gum and Wood Chemical Manufacturing	53	59

**Downstream Metal Products: 58**

NAICS	Industry	Jobs	Score
332312	Fabricated Structural Metal Manufacturing	403	55
332321	Metal Window and Door Manufacturing	1,058	65
332439	Other Metal Container Manufacturing	113	46
332999	All Other Miscellaneous Fabricated Metal Product Manufacturing	371	46

**Food Processing and Manufacturing: 58**

NAICS	Industry	Jobs	Score
311119	Other Animal Food Manufacturing	13	33
311513	Cheese Manufacturing	631	60
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	109	47

**Local Government Services: 58**

NAICS	Industry	Jobs	Score
903999	Local Government, Excluding Education and Hospitals	2,248	58

**Insurance Services: 55**

NAICS	Industry	Jobs	Score
524114	Direct Health and Medical Insurance Carriers	432	27
524126	Direct Property and Casualty Insurance Carriers	1,807	61

**Nonmetal Mining: 51**

NAICS	Industry	Jobs	Score
212311	Dimension Stone Mining and Quarrying	27	51

**Local Food and Beverage Processing and Distribution: 50**

NAICS	Industry	Jobs	Score
311811	Retail Bakeries	50	25
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	1,190	84
424490	Other Grocery and Related Products Merchant Wholesalers	329	35
424810	Beer and Ale Merchant Wholesalers	114	26
445110	Supermarkets and Other Grocery (except Convenience) Stores	902	19
445210	Meat Markets	62	28
445291	Baked Goods Stores	39	28
445299	All Other Specialty Food Stores	11	20
454210	Vending Machine Operators	12	24
454390	Other Direct Selling Establishments	57	26

**Paper and Packaging: 50**

NAICS	Industry	Jobs	Score
322121	Paper (except Newsprint) Mills	660	50
322211	Corrugated and Solid Fiber Box Manufacturing	286	50
322212	Folding Paperboard Box Manufacturing	354	52
322220	Paper Bag and Coated and Treated Paper Manufacturing	49	39
322299	All Other Converted Paper Product Manufacturing	58	35

**Metalworking Technology: 50**

NAICS	Industry	Jobs	Score
332812	Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	516	51
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	33	31

**Recreational and Small Electric Goods: 49**

NAICS	Industry	Jobs	Score
337920	Blind and Shade Manufacturing	160	50
339999	All Other Miscellaneous Manufacturing	28	38

**Vulcanized and Fired Materials: 47**

NAICS	Industry	Jobs	Score
327215	Glass Product Manufacturing Made of Purchased Glass	229	41
327992	Ground or Treated Mineral and Earth Manufacturing	106	61

**Upstream Metal Manufacturing: 43**

NAICS	Industry	Jobs	Score
331318	Other Aluminum Rolling, Drawing, and Extruding	396	46
332119	Metal Crown, Closure, and Other Metal Stamping (except Automotive)	207	38
332618	Other Fabricated Wire Product Manufacturing	42	32

**Local Commercial Services: 42**

NAICS	Industry	Jobs	Score
339950	Sign Manufacturing	94	36
453210	Office Supplies and Stationery Stores	136	38
541110	Offices of Lawyers	324	40
541211	Offices of Certified Public Accountants	186	35
541219	Other Accounting Services	322	43
541380	Testing Laboratories	71	37
541922	Commercial Photography	15	25
561110	Office Administrative Services	12	27
561320	Temporary Help Services	834	56
561612	Security Guards and Patrol Services	119	18
561720	Janitorial Services	372	31
561790	Other Services to Buildings and Dwellings	32	25
561990	All Other Support Services	35	28
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	67	34
812320	Drycleaning and Laundry Services (except Coin-Operated)	28	22

**Agricultural Inputs and Services: 41**

NAICS	Industry	Jobs	Score
111000	Crop Production	113	28
112000	Animal Production and Aquaculture	436	45
115210	Support Activities for Animal Production	45	27

**Biopharmaceuticals: 40**

NAICS	Industry	Jobs	Score
325412	Pharmaceutical Preparation Manufacturing	77	40

**Lighting and Electrical Equipment: 39**

NAICS	Industry	Jobs	Score
335312	Motor and Generator Manufacturing	232	37
335314	Relay and Industrial Control Manufacturing	34	49

**Local Utilities: 38**

NAICS	Industry	Jobs	Score
454310	Fuel Dealers	25	35
517110	Wired Telecommunications Carriers	137	40
562910	Remediation Services	51	36

**Local Financial Services: 38**

NAICS	Industry	Jobs	Score
522110	Commercial Banking	383	37
522130	Credit Unions	184	36
524210	Insurance Agencies and Brokerages	218	34
524292	Third Party Administration of Insurance and Pension Funds	426	42

**Local Retailing of Clothing and General Merchandise: 38**

NAICS	Industry	Jobs	Score
448120	Women's Clothing Stores	79	22
448140	Family Clothing Stores	132	18
448150	Clothing Accessories Stores	26	25
448190	Other Clothing Stores	61	23
448210	Shoe Stores	39	23
448310	Jewelry Stores	65	28
452111	Department Stores (except Discount Department Stores)	33	11
452112	Discount Department Stores	699	13
452910	Warehouse Clubs and Supercenters	938	67
452990	All Other General Merchandise Stores	104	24
453310	Used Merchandise Stores	215	34

**Wood Products: 38**



NAICS	Industry	Jobs	Score
321113	Sawmills	24	29
321911	Wood Window and Door Manufacturing	1,034	29
321918	Other Millwork (including Flooring)	506	56
321920	Wood Container and Pallet Manufacturing	92	28
321992	Prefabricated Wood Building Manufacturing	119	40
321999	All Other Miscellaneous Wood Product Manufacturing	126	40

**Local Real Estate, Construction, and Development: 37**

NAICS	Industry	Jobs	Score
236115	New Single-Family Housing Construction (except For-Sale Builders)	74	28
236118	Residential Remodelers	122	31
236220	Commercial and Institutional Building Construction	211	38
237110	Water and Sewer Line and Related Structures Construction	47	37
237310	Highway, Street, and Bridge Construction	60	42
238110	Poured Concrete Foundation and Structure Contractors	67	34
238140	Masonry Contractors	36	27
238150	Glass and Glazing Contractors	62	34
238160	Roofing Contractors	24	30
238210	Electrical Contractors and Other Wiring Installation Contractors	453	51
238220	Plumbing, Heating, and Air-Conditioning Contractors	390	38
238290	Other Building Equipment Contractors	125	42
238310	Drywall and Insulation Contractors	43	29
238320	Painting and Wall Covering Contractors	57	30
238350	Finish Carpentry Contractors	27	27
238910	Site Preparation Contractors	150	41
238990	All Other Specialty Trade Contractors	44	27
327320	Ready-Mix Concrete Manufacturing	285	40
327390	Other Concrete Product Manufacturing	352	40
332322	Sheet Metal Work Manufacturing	99	34
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	53	31
423320	Brick, Stone, and Related Construction Material Merchant Wholesalers	28	33
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers	218	52
423390	Other Construction Material Merchant Wholesalers	41	37
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	74	32
423730	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers	25	30
444110	Home Centers	467	26
444120	Paint and Wallpaper Stores	15	30
444190	Other Building Material Dealers	63	30
531110	Lessors of Residential Buildings and Dwellings	72	30
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	82	35

531210	Offices of Real Estate Agents and Brokers	51	26
531311	Residential Property Managers	51	28
531312	Nonresidential Property Managers	12	38
531320	Offices of Real Estate Appraisers	19	28

**Financial Services: 36**

NAICS	Industry	Jobs	Score
522120	Savings Institutions	37	30
522220	Sales Financing	144	35
522291	Consumer Lending	71	36
522298	All Other Nondepository Credit Intermediation	11	34
523120	Securities Brokerage	34	55
523930	Investment Advice	44	31

**Education and Knowledge Creation: 35**

NAICS	Industry	Jobs	Score
611310	Colleges, Universities, and Professional Schools	106	28
902612	Colleges, Universities, and Professional Schools (State Government)	178	41
903612	Colleges, Universities, and Professional Schools (Local Government)	237	34

**Information Technology and Analytical Instruments: 35**

NAICS	Industry	Jobs	Score
334112	Computer Storage Device Manufacturing	32	33
511210	Software Publishers	15	39

**Construction Products and Services: 35**

NAICS	Industry	Jobs	Score
237990	Other Heavy and Civil Engineering Construction	41	42
327991	Cut Stone and Stone Product Manufacturing	30	29
327999	All Other Miscellaneous Nonmetallic Mineral Product Manufacturing	11	29
332410	Power Boiler and Heat Exchanger Manufacturing	38	35
332420	Metal Tank (Heavy Gauge) Manufacturing	145	35
332996	Fabricated Pipe and Pipe Fitting Manufacturing	71	31

**Automotive: 34**

NAICS	Industry	Jobs	Score
336310	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	164	23
336320	Motor Vehicle Electrical and Electronic Equipment Manufacturing	75	31
336390	Other Motor Vehicle Parts Manufacturing	353	40

**Federal Government Services: 33**

NAICS	Industry	Jobs	Score
901149	US Postal Service	211	30
901199	Federal Government, Civilian, Excluding Postal Service	114	39

**Distribution and Electronic Commerce: 33**

NAICS	Industry	Jobs	Score
423420	Office Equipment Merchant Wholesalers	29	28
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	17	36
423440	Other Commercial Equipment Merchant Wholesalers	52	33
423510	Metal Service Centers and Other Metal Merchant Wholesalers	61	24
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	52	34
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	108	40
423820	Farm and Garden Machinery and Equipment Merchant Wholesalers	121	36
423830	Industrial Machinery and Equipment Merchant Wholesalers	158	36
423840	Industrial Supplies Merchant Wholesalers	76	38
423850	Service Establishment Equipment and Supplies Merchant Wholesalers	31	28
424110	Printing and Writing Paper Merchant Wholesalers	16	36
424590	Other Farm Product Raw Material Merchant Wholesalers	43	32
424690	Other Chemical and Allied Products Merchant Wholesalers	41	34
424910	Farm Supplies Merchant Wholesalers	74	29
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	123	36
425120	Wholesale Trade Agents and Brokers	22	43
454113	Mail-Order Houses	55	29
493110	General Warehousing and Storage	119	28
493120	Refrigerated Warehousing and Storage	37	25
561499	All Other Business Support Services	29	28

**Printing Services: 33**

NAICS	Industry	Jobs	Score
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323111	Commercial Printing (except Screen and Books)	189	33
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**Local Industrial Products and Services: 32**

NAICS	Industry	Jobs	Score
332710	Machine Shops	141	32
423930	Recyclable Material Merchant Wholesalers	113	31
811219	Other Electronic and Precision Equipment Repair and Maintenance	12	34

**Furniture: 32**

NAICS	Industry	Jobs	Score
337110	Wood Kitchen Cabinet and Countertop Manufacturing	70	28
337122	Nonupholstered Wood Household Furniture Manufacturing	13	29
337127	Institutional Furniture Manufacturing	29	43
337211	Wood Office Furniture Manufacturing	14	27

**Leather and Related Products: 32**

NAICS	Industry	Jobs	Score
314910	Textile Bag and Canvas Mills	35	32

**Local Health Services: 31**

NAICS	Industry	Jobs	Score
339116	Dental Laboratories	14	29
446110	Pharmacies and Drug Stores	151	32
446130	Optical Goods Stores	19	22
621111	Offices of Physicians (except Mental Health Specialists)	1,455	79
621112	Offices of Physicians, Mental Health Specialists	14	23
621210	Offices of Dentists	649	42
621310	Offices of Chiropractors	93	30
621320	Offices of Optometrists	78	29
621330	Offices of Mental Health Practitioners (except Physicians)	42	37
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists	115	43
621391	Offices of Podiatrists	17	64
621420	Outpatient Mental Health and Substance Abuse Centers	57	28
621493	Freestanding Ambulatory Surgical and Emergency Centers	276	40
621498	All Other Outpatient Care Centers	232	46

621511	Medical Laboratories	45	51
621610	Home Health Care Services	313	27
621991	Blood and Organ Banks	32	27
622110	General Medical and Surgical Hospitals	2,282	1
623110	Nursing Care Facilities (Skilled Nursing Facilities)	777	30
623210	Residential Intellectual and Developmental Disability Facilities	149	29
623311	Continuing Care Retirement Communities	94	26
623312	Assisted Living Facilities for the Elderly	487	22
623990	Other Residential Care Facilities	29	25
812210	Funeral Homes and Funeral Services	36	31
812220	Cemeteries and Crematories	15	25
903622	Hospitals (Local Government)	445	18

**Marketing, Design, and Publishing: 31**

NAICS	Industry	Jobs	Score
541810	Advertising Agencies	30	31

**State Government Services: 31**

NAICS	Industry	Jobs	Score
902999	State Government, Excluding Education and Hospitals	120	31

**Local Motor Vehicle Products and Services: 31**

NAICS	Industry	Jobs	Score
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	210	35
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	155	28
423140	Motor Vehicle Parts (Used) Merchant Wholesalers	19	28
441110	New Car Dealers	609	33
441120	Used Car Dealers	138	34
441210	Recreational Vehicle Dealers	23	42
441222	Boat Dealers	23	26
441228	Motorcycle, ATV, and All Other Motor Vehicle Dealers	36	25
441310	Automotive Parts and Accessories Stores	170	30
441320	Tire Dealers	71	29
447110	Gasoline Stations with Convenience Stores	501	27
811111	General Automotive Repair	159	34
811118	Other Automotive Mechanical and Electrical Repair and Maintenance	32	31
811121	Automotive Body, Paint, and Interior Repair and Maintenance	92	29

811122	Automotive Glass Replacement Shops	14	27
811192	Car Washes	45	24

**Footwear: 30**

NAICS	Industry	Jobs	Score
316210	Footwear Manufacturing	37	30

**Local Logistical Services: 30**

NAICS	Industry	Jobs	Score
484110	General Freight Trucking, Local	72	30
484122	General Freight Trucking, Long-Distance, Less Than Truckload	263	33
484210	Used Household and Office Goods Moving	44	25
484220	Specialized Freight (except Used Goods) Trucking, Local	149	31
485410	School and Employee Bus Transportation	202	22
492110	Couriers and Express Delivery Services	351	35
492210	Local Messengers and Local Delivery	33	25
532111	Passenger Car Rental	56	25
532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing	25	28
562111	Solid Waste Collection	34	26

**Downstream Chemical Products: 30**

NAICS	Industry	Jobs	Score
325510	Paint and Coating Manufacturing	45	31
325611	Soap and Other Detergent Manufacturing	12	27

**Transportation and Logistics: 29**

NAICS	Industry	Jobs	Score
481111	Scheduled Passenger Air Transportation	36	25
484121	General Freight Trucking, Long-Distance, Truckload	458	28
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	61	35
485510	Charter Bus Industry	64	31
488510	Freight Transportation Arrangement	10	26

**Plastics: 28**

NAICS	Industry	Jobs	Score
326140	Polystyrene Foam Product Manufacturing	43	31
326199	All Other Plastics Product Manufacturing	77	26

**Local Household Goods and Services: 27**

NAICS	Industry	Jobs	Score
423710	Hardware Merchant Wholesalers	37	30
442110	Furniture Stores	114	26
442210	Floor Covering Stores	23	36
442299	All Other Home Furnishings Stores	62	24
443141	Household Appliance Stores	41	25
444130	Hardware Stores	104	27
453110	Florists	45	24
561730	Landscaping Services	128	27
811213	Communication Equipment Repair and Maintenance	10	28

**Local Entertainment and Media: 26**

NAICS	Industry	Jobs	Score
443142	Electronics Stores	136	24
451110	Sporting Goods Stores	126	24
451120	Hobby, Toy, and Game Stores	72	23
451211	Book Stores	37	23
511110	Newspaper Publishers	25	28
515112	Radio Stations	81	27
515120	Television Broadcasting	101	35
532230	Video Tape and Disc Rental	18	22

**Textile Manufacturing: 26**

NAICS	Industry	Jobs	Score
314120	Curtain and Linen Mills	30	26

**Local Personal Services (Non-Medical): 25**

NAICS	Industry	Jobs	Score
446120	Cosmetics, Beauty Supplies, and Perfume Stores	84	26

446199	All Other Health and Personal Care Stores	29	30
453910	Pet and Pet Supplies Stores	58	24
453998	All Other Miscellaneous Store Retailers (except Tobacco Stores)	28	24
532299	All Other Consumer Goods Rental	31	27
541940	Veterinary Services	120	27
624410	Child Day Care Services	279	24
811490	Other Personal and Household Goods Repair and Maintenance	19	25
812112	Beauty Salons	224	24
812199	Other Personal Care Services	45	23
812910	Pet Care (except Veterinary) Services	15	23

**Hospitality and Tourism: 25**

NAICS	Industry	Jobs	Score
712110	Museums	24	27
713920	Skiing Facilities	92	23
713990	All Other Amusement and Recreation Industries	47	22
721110	Hotels (except Casino Hotels) and Motels	684	25

**Local Community and Civic Organizations: 21**

NAICS	Industry	Jobs	Score
624110	Child and Youth Services	104	30
624120	Services for the Elderly and Persons with Disabilities	541	21
624190	Other Individual and Family Services	94	22
624221	Temporary Shelters	49	26
813211	Grantmaking Foundations	34	29
813219	Other Grantmaking and Giving Services	18	28
813312	Environment, Conservation and Wildlife Organizations	21	22
813319	Other Social Advocacy Organizations	25	23
813410	Civic and Social Organizations	266	15
813910	Business Associations	21	29
813930	Labor Unions and Similar Labor Organizations	142	21

**Local Hospitality Establishments: 18**

NAICS	Industry	Jobs	Score
453220	Gift, Novelty, and Souvenir Stores	38	18
611620	Sports and Recreation Instruction	14	19
713910	Golf Courses and Country Clubs	177	22



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713940	Fitness and Recreational Sports Centers	276	33
713950	Bowling Centers	115	23
722310	Food Service Contractors	17	22
722320	Caterers	69	21
722410	Drinking Places (Alcoholic Beverages)	370	23
722511	Full-Service Restaurants	1,666	15
722513	Limited-Service Restaurants	1,303	16
722514	Cafeterias, Grill Buffets, and Buffets	66	25
722515	Snack and Nonalcoholic Beverage Bars	171	26

Appendix E: Metro Region Market Data

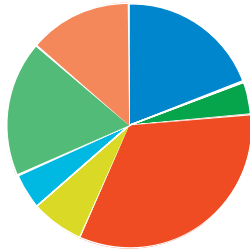


## Wausau Metro Region Consumer Spending Report

Consumer Spending Report (10 mile radius around Rib Mountain town, Wisconsin)

### Apparel (2016)

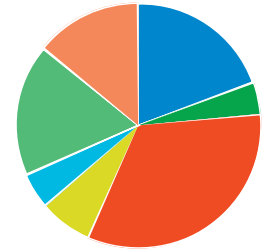
- Men's Apparel
- Boys' Apparel
- Women's Apparel
- Girls' Apparel
- Infants Apparel
- Footwear
- Apparel Services and Accessories



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,944</b>	<b>\$75,726</b>
Men's Apparel	\$374	\$14,593
Boys' Apparel	\$83	\$3,260
Women's Apparel	\$642	\$25,006
Girls' Apparel	\$135	\$5,260
Infants Apparel	\$93	\$3,634
Footwear	\$349	\$13,609
Apparel Services and Accessories	\$266	\$10,364

### Apparel (2021)

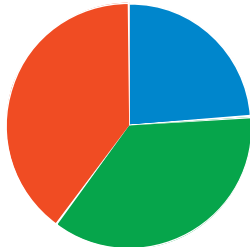
- Men's Apparel
- Boys' Apparel
- Women's Apparel
- Girls' Apparel
- Infants Apparel
- Footwear
- Apparel Services and Accessories



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$2,174</b>	<b>\$88,722</b>
Men's Apparel	\$419	\$17,115
Boys' Apparel	\$92	\$3,790
Women's Apparel	\$721	\$29,428
Girls' Apparel	\$150	\$6,131
Infants Apparel	\$103	\$4,241
Footwear	\$380	\$15,517
Apparel Services and Accessories	\$306	\$12,500

### Entertainment (2016)

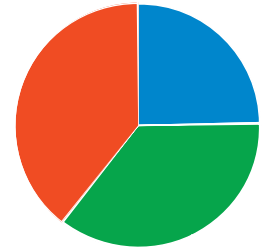
- Fees And Admissions
- Video And Audio Equipment
- Recreational Equipment And Supplies



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$3,140</b>	<b>\$122,291</b>
Fees And Admissions	\$750	\$29,204
Video And Audio Equipment	\$1,140	\$44,406
Recreational Equipment And Supplies	\$1,250	\$48,681

### Entertainment (2021)

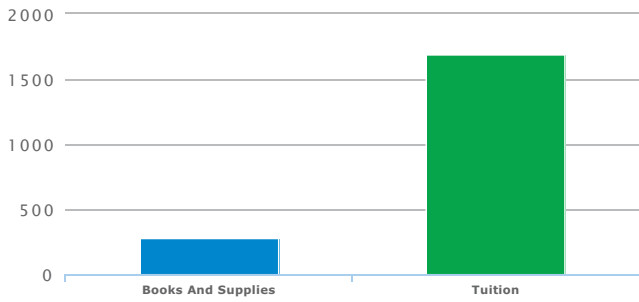
- Fees And Admissions
- Video And Audio Equipment
- Recreational Equipment And Supplies



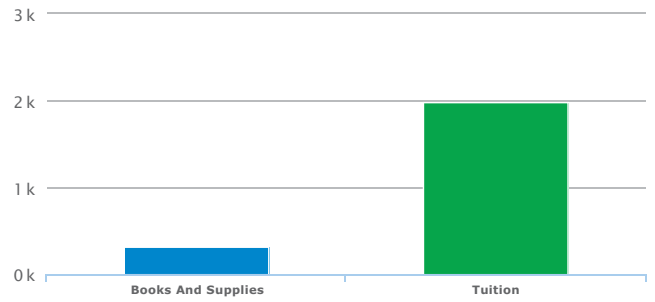
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$3,510</b>	<b>\$143,247</b>
Fees And Admissions	\$870	\$35,527
Video And Audio Equipment	\$1,260	\$51,423
Recreational Equipment And Supplies	\$1,379	\$56,297

### Education (2016)

### Education (2021)

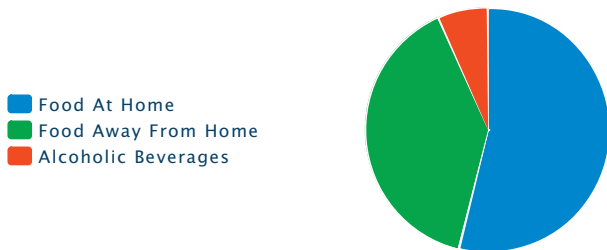


	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,966</b>	<b>\$76,580</b>
Books And Supplies	\$275	\$10,718
Tuition	\$1,691	\$65,862



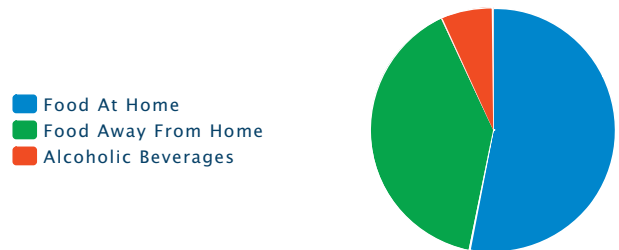
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$2,301</b>	<b>\$93,918</b>
Books And Supplies	\$322	\$13,144
Tuition	\$1,979	\$80,774

### Food and Beverages (2016)



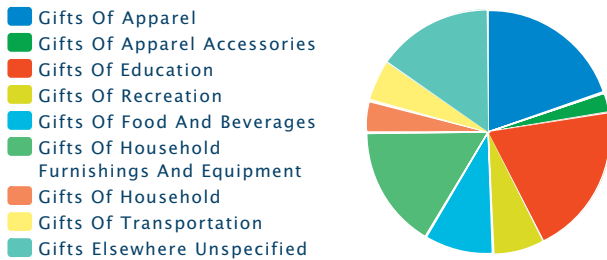
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$8,289</b>	<b>\$322,794</b>
Food At Home	\$4,471	\$174,098
Food Away From Home	\$3,264	\$127,112
Alcoholic Beverages	\$554	\$21,583

### Food and Beverages (2021)



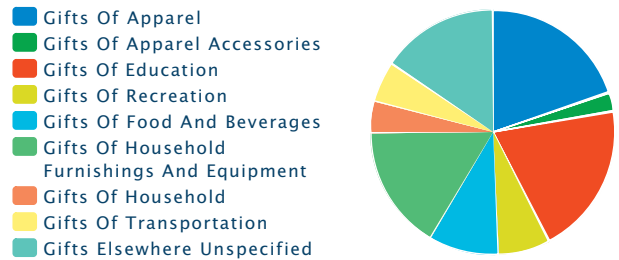
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$9,137</b>	<b>\$372,857</b>
Food At Home	\$4,860	\$198,335
Food Away From Home	\$3,645	\$148,755
Alcoholic Beverages	\$631	\$25,767

### Gifts (2016)



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,353</b>	<b>\$52,714</b>
Gifts Of Apparel	\$268	\$10,469
Gifts Of Apparel Accessories	\$34	\$1,336
Gifts Of Education	\$272	\$10,621
Gifts Of Recreation	\$92	\$3,594
Gifts Of Food And Beverages	\$125	\$4,872
Gifts Of Household Furnishings And Equipment	\$220	\$8,596
Gifts Of Household	\$57	\$2,244
Gifts Of Transportation	\$73	\$2,846
Gifts Elsewhere Unspecified	\$208	\$8,137

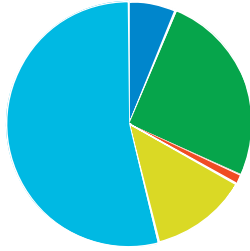
### Gifts (2021)



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,564</b>	<b>\$63,840</b>
Gifts Of Apparel	\$310	\$12,653
Gifts Of Apparel Accessories	\$39	\$1,617
Gifts Of Education	\$314	\$12,846
Gifts Of Recreation	\$106	\$4,353
Gifts Of Food And Beverages	\$144	\$5,886
Gifts Of Household Furnishings And Equipment	\$255	\$10,412
Gifts Of Household	\$66	\$2,705
Gifts Of Transportation	\$85	\$3,481
Gifts Elsewhere Unspecified	\$242	\$9,887

### Household Furnishings (2016)

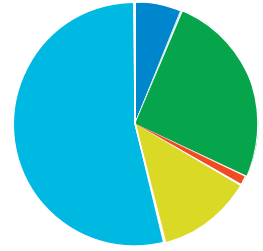
- Household Textiles
- Furniture
- Floor Coverings
- Major Appliances
- Housewares And Small Appliances



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,917</b>	<b>\$74,663</b>
Household Textiles	\$120	\$4,681
Furniture	\$490	\$19,101
Floor Coverings	\$26	\$1,027
Major Appliances	\$248	\$9,664
Housewares And Small Appliances	\$1,032	\$40,190

### Household Furnishings (2021)

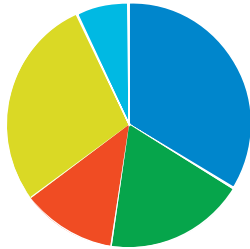
- Household Textiles
- Furniture
- Floor Coverings
- Major Appliances
- Housewares And Small Appliances



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$2,159</b>	<b>\$88,129</b>
Household Textiles	\$134	\$5,473
Furniture	\$556	\$22,699
Floor Coverings	\$30	\$1,259
Major Appliances	\$277	\$11,329
Housewares And Small Appliances	\$1,160	\$47,370

### Shelter (2016)

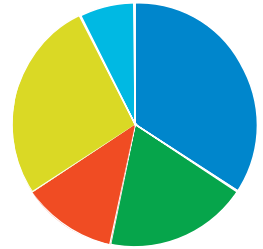
- Mortgage Interest
- Property Taxes
- Miscellaneous Owned Dwelling Costs
- Rental Costs
- Other Lodging



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$11,550</b>	<b>\$449,768</b>
Mortgage Interest	\$3,900	\$151,889
Property Taxes	\$2,154	\$83,881
Miscellaneous Owned Dwelling Costs	\$1,428	\$55,608
Rental Costs	\$3,256	\$126,812
Other Lodging	\$810	\$31,578

### Shelter (2021)

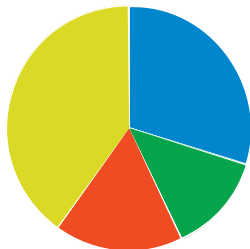
- Mortgage Interest
- Property Taxes
- Miscellaneous Owned Dwelling Costs
- Rental Costs
- Other Lodging



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$12,909</b>	<b>\$526,774</b>
Mortgage Interest	\$4,420	\$180,389
Property Taxes	\$2,455	\$100,214
Miscellaneous Owned Dwelling Costs	\$1,608	\$65,618
Rental Costs	\$3,465	\$141,410
Other Lodging	\$959	\$39,143

### Household Operations (2016)

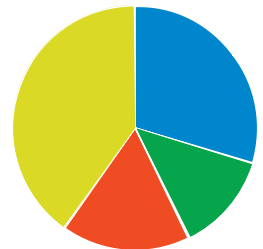
- Babysitting And Elderly Care
- Household Services
- Alimony And Child Support
- Household Supplies



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,559</b>	<b>\$60,740</b>
Babysitting And Elderly Care	\$465	\$18,111
Household Services	\$204	\$7,954
Alimony And Child Support	\$264	\$10,318
Household Supplies	\$625	\$24,357

### Household Operations (2021)

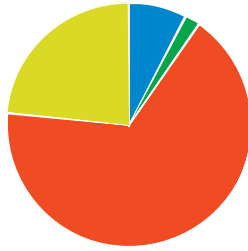
- Babysitting And Elderly Care
- Household Services
- Alimony And Child Support
- Household Supplies



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$1,784</b>	<b>\$72,835</b>
Babysitting And Elderly Care	\$530	\$21,657
Household Services	\$233	\$9,542
Alimony And Child Support	\$304	\$12,424
Household Supplies	\$715	\$29,213

### Personal Care (2016)

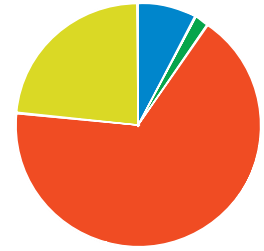
- Hair Care
- Electric Personal Care Appliances
- Personal Care Services
- Personal Care Products



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$729</b>	<b>\$28,408</b>
Hair Care	\$56	\$2,210
Electric Personal Care Appliances	\$14	\$559
Personal Care Services	\$488	\$19,004
Personal Care Products	\$170	\$6,634

### Personal Care (2021)

- Hair Care
- Electric Personal Care Appliances
- Personal Care Services
- Personal Care Products



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$809</b>	<b>\$33,050</b>
Hair Care	\$63	\$2,574
Electric Personal Care Appliances	\$15	\$652
Personal Care Services	\$541	\$22,105
Personal Care Products	\$189	\$7,720

### Utilities (2016)

- Natural Gas
- Electricity
- Fuel Oil And Other Fuels
- Telephone Service
- Other Utilities



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$4,268</b>	<b>\$166,197</b>
Natural Gas	\$453	\$17,649
Electricity	\$1,621	\$63,140
Fuel Oil And Other Fuels	\$155	\$6,046
Telephone Service	\$1,456	\$56,715
Other Utilities	\$581	\$22,647

### Utilities (2021)

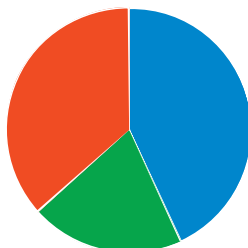
- Natural Gas
- Electricity
- Fuel Oil And Other Fuels
- Telephone Service
- Other Utilities



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$4,662</b>	<b>\$190,253</b>
Natural Gas	\$498	\$20,339
Electricity	\$1,764	\$71,985
Fuel Oil And Other Fuels	\$170	\$6,943
Telephone Service	\$1,591	\$64,939
Other Utilities	\$638	\$26,047

### Reading (2016)

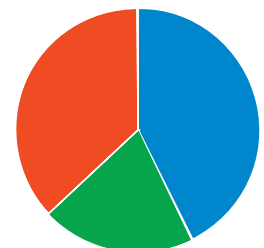
- Newspapers
- Magazines
- Books



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$124</b>	<b>\$4,857</b>
Newspapers	\$53	\$2,084
Magazines	\$25	\$996
Books	\$45	\$1,778

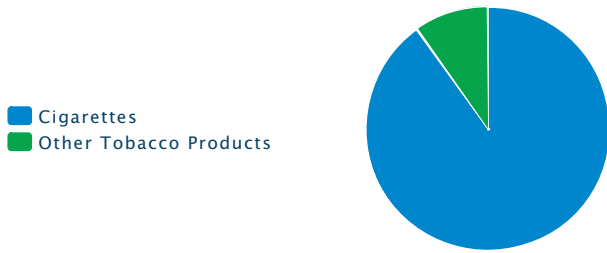
### Reading (2021)

- Newspapers
- Magazines
- Books



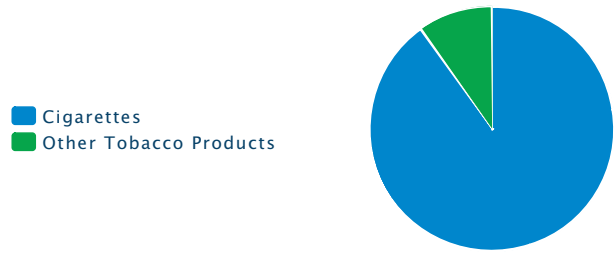
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$139</b>	<b>\$5,697</b>
Newspapers	\$59	\$2,446
Magazines	\$28	\$1,167
Books	\$51	\$2,083

### Tobacco (2016)



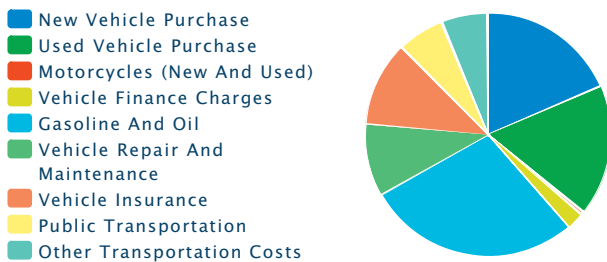
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$356</b>	<b>\$13,863</b>
Cigarettes	\$320	\$12,476
Other Tobacco Products	\$35	\$1,388

### Tobacco (2021)



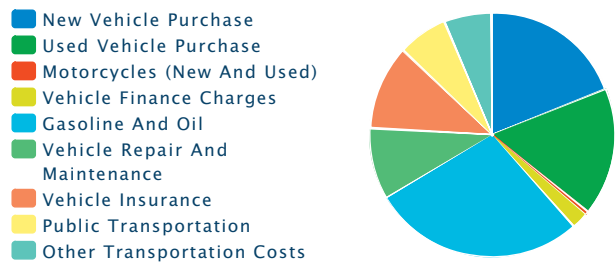
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$377</b>	<b>\$15,416</b>
Cigarettes	\$339	\$13,873
Other Tobacco Products	\$37	\$1,543

### Transportation (2016)



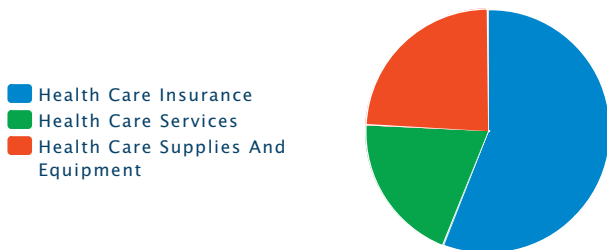
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$10,743</b>	<b>\$418,337</b>
New Vehicle Purchase	\$1,994	\$77,651
Used Vehicle Purchase	\$1,856	\$72,291
Motorcycles (New And Used)	\$46	\$1,803
Vehicle Finance Charges	\$246	\$9,605
Gasoline And Oil	\$3,039	\$118,367
Vehicle Repair And Maintenance	\$1,018	\$39,641
Vehicle Insurance	\$1,200	\$46,744
Public Transportation	\$679	\$26,452
Other Transportation Costs	\$662	\$25,783

### Transportation (2021)



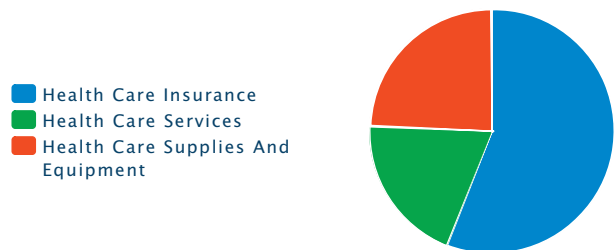
	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$11,833</b>	<b>\$482,853</b>
New Vehicle Purchase	\$2,241	\$91,466
Used Vehicle Purchase	\$1,993	\$81,333
Motorcycles (New And Used)	\$49	\$2,033
Vehicle Finance Charges	\$269	\$11,007
Gasoline And Oil	\$3,309	\$135,036
Vehicle Repair And Maintenance	\$1,120	\$45,707
Vehicle Insurance	\$1,315	\$53,682
Public Transportation	\$783	\$31,959
Other Transportation Costs	\$750	\$30,629

### Health Care (2016)



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$4,577</b>	<b>\$178,258</b>
Health Care Insurance	\$2,562	\$99,787
Health Care Services	\$905	\$35,252
Health Care Supplies And Equipment	\$1,109	\$43,219

### Health Care (2021)

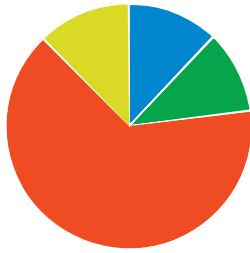


	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$5,010</b>	<b>\$204,453</b>
Health Care Insurance	\$2,804	\$114,426
Health Care Services	\$989	\$40,385
Health Care Supplies And Equipment	\$1,216	\$49,641



### Miscellaneous Expenses (2016)

- Legal And Accounting
- Funeral And Cemetery
- Finance Charges Excluding Mortgage And Vehicle
- Other Miscellaneous Expenses



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$834</b>	<b>\$32,507</b>
Legal And Accounting	\$100	\$3,929
Funeral And Cemetery	\$92	\$3,606
Finance Charges Excluding Mortgage And Vehicle	\$537	\$20,935
Other Miscellaneous Expenses	\$103	\$4,037

### Personal Insurance (2016)

	\$ PER HOUSEHOLD	TOTAL \$000'S
	\$404	\$15,761

### Contributions (2016)

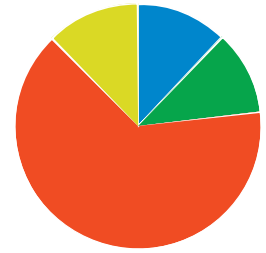
	\$ PER HOUSEHOLD	TOTAL \$000'S
	\$2,350	\$91,527

### Retail Potential (2016)

	\$ PER HOUSEHOLD	TOTAL \$000'S
New Car Dealers	\$3,900	\$151,882
User Car Dealers	\$233	\$9,087
Recreational Vehicle Dealers	\$11	\$465
Motorcycle and Boat Dealers	\$167	\$6,530
Auto Parts and Accessories	\$604	\$23,520
Tire Dealers	\$275	\$10,716
Furniture Stores	\$378	\$14,754
Floor Covering Stores	\$135	\$5,282
Other Home Furnishing Stores	\$126	\$4,944
Appliances and Electronics Stores	\$879	\$34,241
Computer Stores	\$1,567	\$61,044
Camera and Photography Stores	\$101	\$3,949
Hardware Stores	\$206	\$8,048
Paint and Wallpaper Stores	\$18	\$737
Home Centers	\$458	\$17,859
Other Building Materials Stores	\$551	\$21,474
Outdoor Power Equipment Stores	\$17	\$673
Nursery and Garden Stores	\$138	\$5,375
Grocery Stores	\$6,368	\$247,981
Convenience Stores	\$270	\$10,538
Meat Markets	\$65	\$2,531
Fish and Seafood Markets	\$15	\$597
Fruit and Vegetable Markets	\$30	\$1,193
Other Specialty Food Markets	\$47	\$1,863
Liquor Stores	\$150	\$5,854

### Miscellaneous Expenses (2021)

- Legal And Accounting
- Funeral And Cemetery
- Finance Charges Excluding Mortgage And Vehicle
- Other Miscellaneous Expenses



	\$ PER HOUSEHOLD	TOTAL \$000'S
<b>Totals:</b>	<b>\$922</b>	<b>\$37,633</b>
Legal And Accounting	\$111	\$4,552
Funeral And Cemetery	\$102	\$4,197
Finance Charges Excluding Mortgage And Vehicle	\$593	\$24,212
Other Miscellaneous Expenses	\$114	\$4,672

### Personal Insurance (2021)

	\$ PER HOUSEHOLD	TOTAL \$000'S
	\$465	\$18,999

### Contributions (2021)

	\$ PER HOUSEHOLD	TOTAL \$000'S
	\$2,754	\$112,403

Source: Applied Geographic Solutions, 2016

Pharmacy and Drug Stores	\$1,344	\$52,341
Costmetics and Beauty Stores	\$57	\$2,235
Optical Goods Stores	\$138	\$5,386
Other Health and Personal Care Stores	\$108	\$4,243
Gasoline Stations with Convenience Stores	\$1,017	\$39,625
Gasoline Stations without Convenience Stores	\$167	\$6,518
Men's Clothing Stores	\$56	\$2,183
Women's Clothing Stores	\$179	\$6,989
Childrens' and Infant's Clothing Stores	\$99	\$3,881
Family Clothing Stores	\$378	\$14,720
Clothing Accessory Stores	\$20	\$781
Other Apparel Stores	\$44	\$1,750
Shoe Stores	\$123	\$4,815
Jewelry Stores	\$240	\$9,365
Luggage Stores	\$224	\$8,759
Sporting Goods Stores	\$169	\$6,589
Hobby, Toy, and Game Stores	\$50	\$1,963
Sewing and Needlecraft Stores	\$19	\$742
Musical Instrument Stores	\$40	\$1,566
Book Stores	\$358	\$13,941
Record, Tape, and CD Stores	\$95	\$3,708
Department Stores	\$2,991	\$116,495
Warehouse Superstores	\$1,284	\$50,010
Other General Merchandise Stores	\$359	\$13,983
Florists	\$29	\$1,139
Office and Stationary Stores	\$271	\$10,574
Gift and Souvenir Stores	\$87	\$3,421
Used Merchandise Stores	\$57	\$2,250
Pet and Pet Supply Stores	\$118	\$4,612
Art Dealers	\$11	\$431
Mobile Home Dealers	\$0	\$23
Other Miscellaneous Retail Stores	\$119	\$4,639
Mail Order and Catalog Stores	\$2,168	\$84,430
Vending Machines	\$92	\$3,614
Fuel Dealers	\$382	\$14,900
Other Direct Selling Establishments	\$193	\$7,533
Hotels and Other Travel Accomodations	\$144	\$5,607
RV Parks	\$2	\$93
Rooming and Boarding Houses	\$1	\$40
Full Service Restaurants	\$968	\$37,701
Limited Service Restaurants	\$960	\$37,403
Special Food Services and Catering	\$161	\$6,284
Drinking Places	\$87	\$3,403

**Rib Mountain town, Wisconsin**  
**Population:** 6,783  
**Labor Force Size:** 3,667  
**Bachelors Degree or Higher:** 38.49%  
**Household Median Income:** 75,324  
**Commute Travel Time:** 16

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- Labor Force Report
- Demographics Report
- Consumer Spending Report
- Wages Report
- Talent Pool Report
- Housing Report

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