

# NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION



## Comprehensive Economic Development Strategy (CEDS) 2021



A Five-Year Regional Strategy for North Central Wisconsin



**North Central Wisconsin Regional Planning Commission  
Comprehensive Economic Development Strategy  
(CEDS)**

**Table of Contents:**

Introduction	1
Chapter 1: Demographics & Workforce	4
Chapter 2: Regional Economy	16
Chapter 3: Transportation & Utilities	38
Chapter 4: Regional Integration & SWOT Review	45
Chapter 5: Economic Development Resources	48
Chapter 6: Regional Strategy	56
Maps:	
North Central Region	
North Central Sub-Regions	
Transportation	
Infrastructure & Utilities	
Business & Industrial Parks	
Attachments:	
Population by County, Region & State	
Employment by County, Region & State	
Regional Priority Projects	
Resolution of Adoption	

The North Central Wisconsin Regional Planning Commission (NCWRPC) is a voluntary association of governments, created in 1973 under Wisconsin State Statute 66.945, now 66.0309. The Region is also designated as an Economic Development District (EDD) by the U. S. Department of Commerce, Economic Development Administration (EDA). NCWRPC serves the Counties of Adams, Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas, and Wood.

This page intentionally left blank.

## **Introduction**

### **NCWRPC Background**

The North Central Wisconsin Regional Planning Commission (NCWRPC) is a voluntary association of governments, created in 1973 under Wisconsin State Statute 66.945, now 66.0309. The NCWRPC helps within a ten county Region in the areas of economic development, geographic information systems (GIS), intergovernmental cooperation, land use planning and transportation. Staff provides professional planning services to communities and for projects of both local and Regional significance.

The NCWRPC is designated as an Economic Development District (EDD) by the U. S. Department of Commerce, Economic Development Administration (EDA). Current members of the EDD are Adams, Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, and Vilas, as well as parts of Portage and Wood Counties. However, the demographic and economic information presented in the report includes the entire ten county Region.

### **Purpose of the CEDS**

The purpose of the CEDS is multifaceted. The CEDS is designed to provide baseline information on demographics and economic data, development of strategies, and identify potential projects within the Region. Preparation and adoption of the CEDS maintains both the Region's EDD designation, but also maintains grant eligibility for those participating units of government.

### **EDA History in North Central Wisconsin**

Since 1979 the North Central Wisconsin Regional Planning Commission has partnered with the EDA as an Economic Development District. That partnership has led to an investment of over \$23 million dollars in North Central Wisconsin projects. **Table 1** displays EDA investments in the Region.

The public works program, which supports the construction, expansion or upgrade of essential public infrastructure and facilities, comprises roughly three fourths of the investment in the Region. The remaining projects were funded under the EDA's technical assistance programs. To date, all but one county in the region has received EDA funding.

Portage and Wood Counties have not been active members of the EDD which puts them at a disadvantage for receiving EDA grants. Wood County joined in 2020 and Portage County joined in 2021. However, numerous local cities and villages within those counties were active members, and those communities did list projects in the CEDS and some received funding.

**Table 1: EDA Investment in North Central Wisconsin**

Year Awarded	Recipient	County	Project Description	Program	EDA Funding
1994	City of Adams	Adams	Industrial Park Development	Public Works	\$ 904,200
2010	City of Adams	Adams	Adams South Business Park	Public Works	\$ 608,935
2017	Adams County	Adams	Flood Mitigation Study	Technical Assistance	\$ 40,000
1980	Sokaogon Chippewa	Forest	Exhibition Grounds Project	Public Works	\$ 100,000
1981	Forest Co. Transit Comm.	Forest	Railroads Rehabilitation	Public Works	\$ 1,800,000
1987	Forest County	Forest	Strategy Development	Technical Assistance	\$ 25,000
1991	City of Crandon	Forest	Industrial Park Development	Public Works	\$ 278,545
2020	Forest County Potawatomi Community	Forest	Feasibility Study	Technical Assistance	\$ 65,030
1987	City of Elroy	Juneau	Industrial Park Development	Public Works	\$ 346,785
2001	Village of Necedah	Juneau	Infrastructure Improvements	Public Works	\$ 499,600
2002	Juneau County EDC	Juneau	Economic Adjustment Strategy	Technical Assistance	\$ 56,000
2010	City of Mauston	Juneau	Industrial Park Expansion	Public Works	\$ 1,246,500
2017	Juneau County	Juneau	Flood Mitigation Study	Technical Assistance	\$ 40,000
1998	City of Antigo	Langlade	Business Park Improvements	Public Works	\$ 751,800
2009	Langlade County	Langlade	Wood Technology Center for Excellence	Public Works	\$ 1,280,000
2011	Langlade County	Langlade	Industrial	Public Works	\$ 218,447
1980	City of Tomahawk	Lincoln	Water System Improvements	Public Works	\$ 500,000
1981	City of Wausau	Marathon	Construct Parking Decks	Public Works	\$ 1,700,000
1983	City of Wausau	Marathon	Infrastructure Improvements	Public Works	\$ 800,000
1987	City of Wausau	Marathon	Implementation of Grant	Technical Assistance	\$ 720,000
1988	City of Mosinee	Marathon	Industrial Park Expansion	Public Works	\$ 991,916
1993	NCWRPC	Marathon	Flood Recovery Strategy	Technical Assistance	\$ 104,592
1994	NCWRPC	Marathon	Study Flood Reduction	Technical Assistance	\$ 53,698
2000	NCWRPC	Marathon	Project Impact Plan	Technical Assistance	\$ 20,000
2007	NCWRPC	Marathon	Grow North Project	Technical Assistance	\$ 25,000
2008	NCWRPC	Marathon	Flood Recovery Coordinator	Technical Assistance	\$ 45,000
1985	City of Stevens Point	Portage	Industrial Park	Public Works	\$ 470,965
1997	Lac du Flambeau Band	Vilas	Construct Fish Hatchery	Public Works	\$ 386,063
2003	City of Eagle River	Vilas	Industrial Park Infrastructure	Public Works	\$ 2,119,061
2018	Lac du Flambeau Band	Vilas	Workforce Training Center	Public Works	\$ 3,000,000
2019	City of Eagle River	Vilas	Backup Power Generation	Technical Assistance	\$ 477,738
1979	City of Wisconsin Rapids	Wood	Road and Bridge	Public Works	\$ 850,000
1985	Marshfield Dev. Corp	Wood	Incubator Study	Public Works	\$ 14,621
1989	City of Wisconsin Rapids	Wood	Strategy Development	Technical Assistance	\$ 58,689
2005	City of Nekoosa	Wood	Business Park Utility & Road	Public Works	\$ 1,234,000
2007	City of Wisconsin Rapids	Wood	Wastewater Treatment Facility	Public Works	\$ 1,500,000
2008	Heart of WI Incubator	Wood	Service to Displaced Workers	Technical Assistance	\$ 100,000
<b>Total EDA Investment:</b>					<b>\$ 23,432,185</b>

## **CEDS Process and Committee**

The CEDS Update Committee is comprised of the entire NCWRPC Commission. With the Regional Recovery Plan process underway – because of the CARES Act funding - the Commission was used to allow area economic professional to be involved in that critical effort. Part of that effort includes an update to this CED document as well. Development of CEDS took place over 2020, much of it virtually. Economic development corporations, regional organizations, and others were involved or were provided an opportunity to review and comment on the CEDS.

The Commission also directs the NCWRPC's work program. Three Commissioners represent each of the member counties of the North Central Wisconsin Regional Planning Commission. One Commissioner is appointed by the county and the other two are appointed by the Governor; one outright and one from a list of names submitted by the county. The NCWRPC staff has no authority to choose its Commissioners. A list of Commissioners can be found on the inside cover of this document.

## **Regional History**

Originally, the Region's diverse natural and agricultural resources were the basis of the economy, whether it was the fertile soils of the central and southern areas or the vast forests of the north. As more people settled in the Region, they developed roads, railroads, and dams for power. This new infrastructure, in turn, expanded the economy beyond simple farming and logging operations. Resources that once left the Region in their "raw" state were now transformed into finished products here.

Communities like Rhinelander, Merrill, Wausau, Stevens Point, and Wisconsin Rapids capitalized on their location to form value added industries focused on wood products, agriculture, and manufacturing. As these industries progressed, so did the service-oriented industries such as government, transportation, communications, public utilities, trade, finance, insurance, and real estate. The result is the wide diversity of economic activity that we see in the Region today.

## **Land Area & Communities**

North Central Wisconsin's ten counties cover an area of 9,328 square miles, or about 17 percent of the state's total area. The Region is long and narrow stretching 185 miles from Forest and Vilas Counties in the north to Adams and Juneau Counties in the south. See Map 1.

The area is diverse, from lakes and forests in the north, to rolling hills and agriculture in the center, to relatively flat areas of forest and agriculture in the south. Within the ten-county Region there are 267 local units of government, of which 198 are towns, 38 are villages, 21 are cities and 4 tribal nations. Combined, the Region is home to over 448,000 persons.

According to the U.S. Census Bureau, only Marathon County meets the requirements to be classified as a Metropolitan Statistical Area (MSA). The other nine counties are rural in nature. The City of Wausau, located in Marathon County, is the only major population center in the Region. The combined population of the Wausau urban area exceeds 70,000 persons.

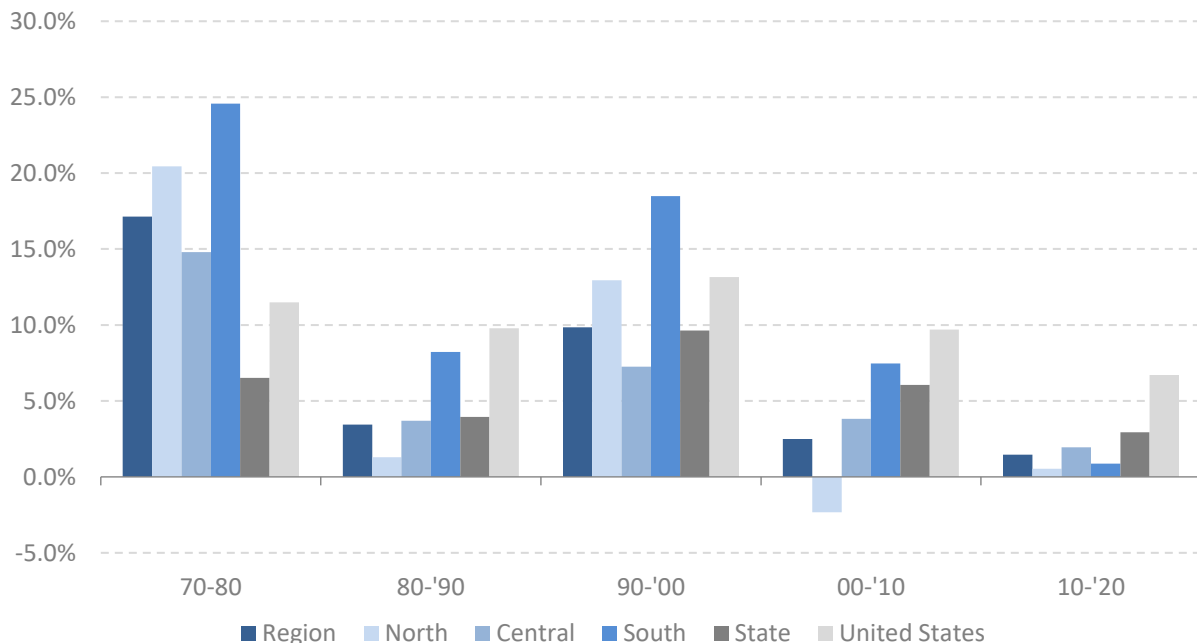
## Chapter 1: Demographics & Workforce

### Population

The 2020 regional population is estimated at 448,322 people. Five of the ten counties experienced a decline in population since 2010. The Region as a whole increased about four percent from 2010 to 2020. This is much slower growth than the previous decade where all only three counties decreased in population. Juneau County had the largest percent of population growth between 2010 and 2020 with an increase of 12.1 percent. It is important to note that the US Census does not track seasonal residents in their population counts. Therefore, there may be times throughout the year where counties experience a much higher population than recorded through the US Census.

Throughout the document the tables include summaries for North, Central, and South sub-regions. The North includes the counties of Forest, Langlade, Lincoln, Oneida and Vilas. The Central includes Marathon, Portage and Wood, while the South includes Adams and Juneau Counties. These are “Sub” regions that have been identified in our Region. **Figure 1-1** shows the 50-year growth trend of the Region, demonstrating that growth in the Region is subject to more extreme fluctuations than the state or nation, but in general followed the same trends of growth and decline. Growth was very high during the 1970s, declined dramatically during the 1980s, increased again during the 1990s, and declined again in the 2000s. The Northern sub-region had a population decline during the 2000s. The South sub-region consistently had the largest growth rate of each decade displayed between 1970 and 2010, before the Central sub-region had a higher growth rate between 2010 and 2020. During the past decade, the region and all three of the sub-regions were below the state’s growth rate and were well below the national rate of growth.

Figure 1-1: Historic Growth Rates





The North Central Region makes up 7.7 percent of Wisconsin's 2020 population. Marathon County's 2020 population of 137,237 people makes up over 30 percent of the Region's population. Wood County (75,381) and Portage County (71,670) follow as second and third. Combined, these three counties represent 63 percent of the Region's population while the remaining seven counties are primarily rural in character with populations ranging from about 9,000 to 36,000.

### **Seasonal Dwellings**

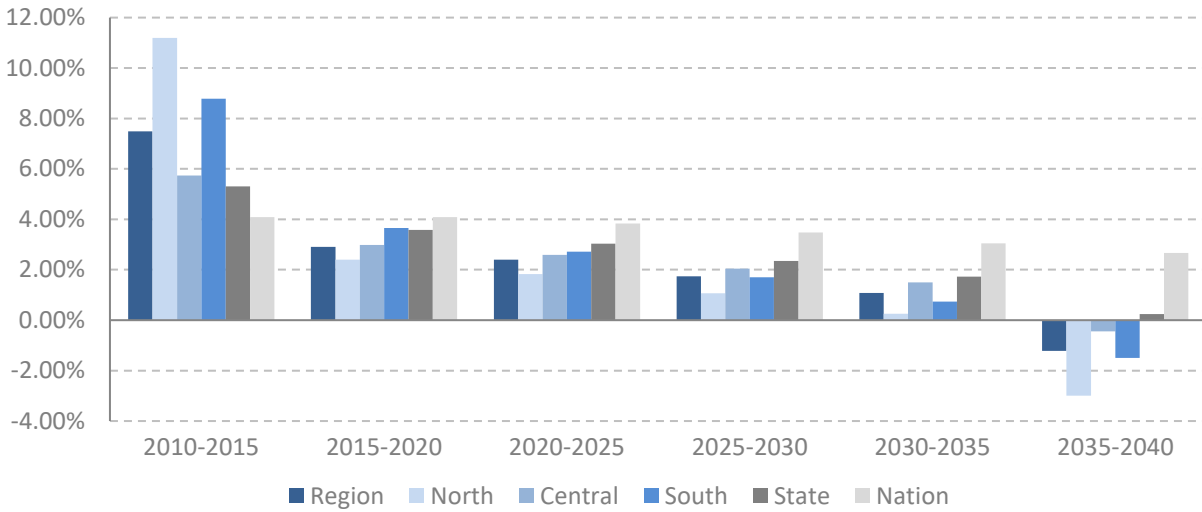
The continuing increase in seasonal dwellings in most counties indicates that the southern and northern sub-regions continue to draw people, but that a likely effect of the Great Recession has been to lead the owners of many of these seasonal dwellings to postpone their retirement. The COVID-19 Pandemic effects are still unknown, but there is some thought that people may look to relocate to less dense areas. Nearly three-quarters of all seasonal dwellings in the Region are in the Northern sub-region, with another fifth in the south. Seasonal and recreational dwellings are a minor factor in the housing picture in the Central sub-region, comprising less than three percent of all units in Marathon, Portage, and Wood Counties.

The fact that seasonal dwellings increased throughout the Region, despite the economic dislocation of the last decade, indicates an underlying dynamic that could reignite population growth after the effects of the financial crisis have passed. Those who have seasonal dwellings in the Region are often not counted in the population where the seasonal and recreational dwellings are located, because they claim full time residency in other parts of the state and country and are counted in those population counts. This creates seasonal fluctuations of population in the north and south sub-regions as seasonal dwellings comprise between 17 percent and 50 percent of dwelling units in these counties. So, although the North sub-region saw a reduction of population between 2000 and 2010, it may be the result of full-time residents becoming seasonal residents.

### **Population Projections**

The population projections shown in **Figure 1-2** predict that North Central Wisconsin can expect a growth in population until approximately 2035. Displayed are population projections from 2015-2040 for the Region, the regional sub-regions, the state of Wisconsin, and the nation. These projections show that the highest rate of population growth occurs between 2010 and 2015, and gradually declines after that. During this time, the southern sub-Region will have the highest rate of growth at 12.72 percent. The entire Region will grow slower than the state, for a total projected population increase of approximately 36,000 people over the 25-year period. Growth rates across all regions, the state, and the United States will slow over the time period. The North Central Region is expected to show negative growth by 2040, ranging from 2.74 percent in 2020 to -1.22 percent in 2040.

**Figure 1-2: Projected Rate of Growth**

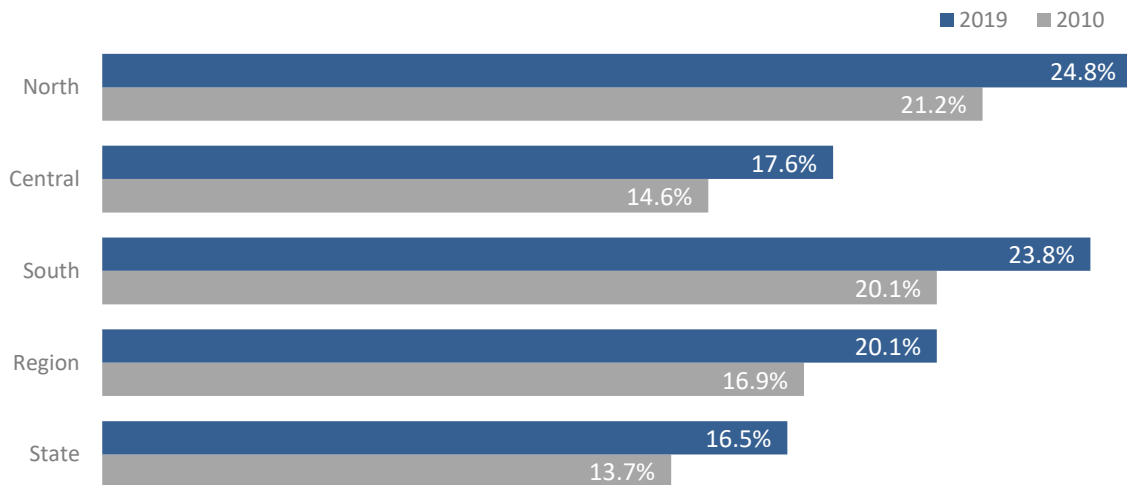


**Population Age**

According to The Bureau of Labor Statistics, the baby-boom generation will move entirely into the 60-years-and-older age group by 2024. The aging of baby boomers and the transition into retirement age is causing labor force participation rates to decline, a trend that is expected to continue into the future.

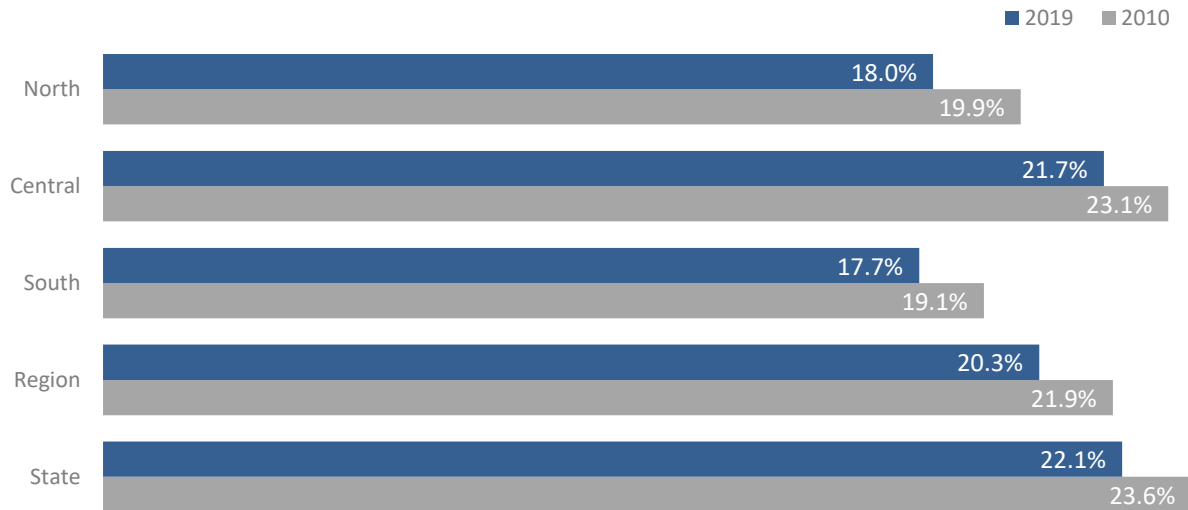
In the North Central Region the percent of population over 65 years of age increased from 16.9 percent to 20.1 percent of the population between 2010 and 2019, as shown in **Figure 1-3**. By 2035, an estimated 29.1 percent of the Region will be people aged 65 and older, compared to 34.0 percent in the South sub-region, 25.2 percent in the Central sub-region, and 33.3 percent in the North sub-region.

**Figure 1-3: Percent of Population Over 65**



In addition to the Region’s growing population of those over 65 years of age, there is a reduction in those aged 17 and under, as shown in **Figure 1-4**. Between 2010 and 2019, the North Central Region had a 1.6 percent reduction in population aged 17 and under. The South and North sub-regions each saw reductions over that time period of 1.4 percent.

**Figure 1-4: Percent of Population Under 18**

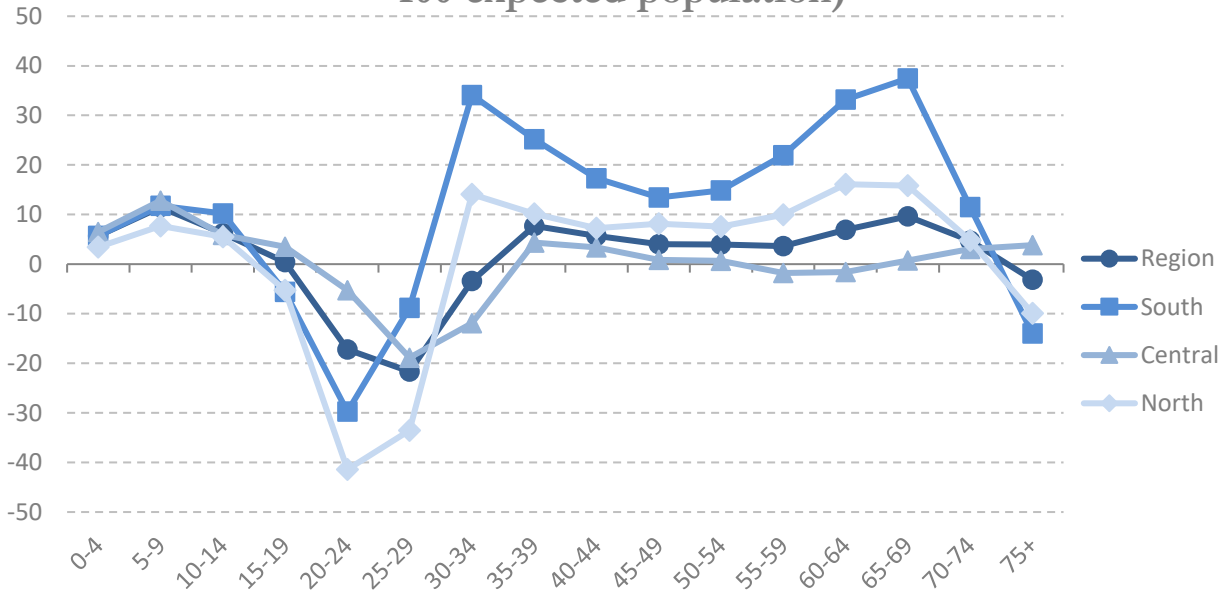


Future projections show the 17 and under population increasing in the Region at a rate of 3.9 percent over 15 years, well below the state projection of 10.2 percent. The Central sub-region is the only sub-region to see any growth in population under the age of 65 by 2035, with a three percent increase in population aged 19 and under.

**Migration**

Between 2000 and 2010, the North Central Wisconsin Region had a slight in-migration of 6.9 people per 1,000 people. **Figure 1-5** shows net migration trends for the region, highlighting out-migration for four age groups, 20-24, 25-29, 30-34 and 75+. These migration trends are typical of rural areas where many young adults migrate seeking secondary education or employment opportunities, and many older adults migrate out to move closer to family and/or seek urban amenities such as smaller, lower maintenance housing, health care services, and cultural amenities.

**Figure 1-5: 2000-2010 Net Migration (net migrants per 100 expected population)**



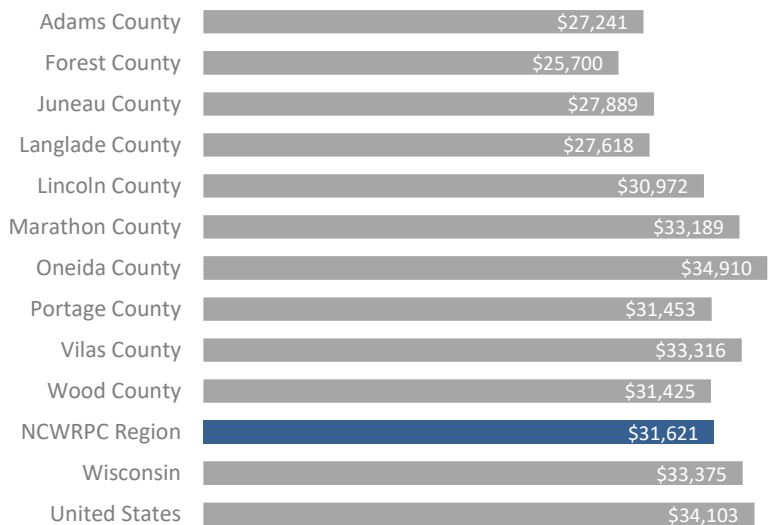
Source: University of Wisconsin - Madison, Applied Population Lab, 2013

In-migration of 15-24 year olds is entirely concentrated in Portage County at a rate of 53 migrants per 100 people, and is likely due to incoming students at UW-Stevens Point. Every County in the region experienced an out-migration of 25-29 year olds. Portage County also accounts for the higher rate of out-migration of 30-34 year olds, with Portage and Forest being the only counties with an out-migration of this age group. Vilas, Juneau and Adams County have the highest rates of in-migration of 30-34 year olds. Wood, Portage, Marathon and Lincoln Counties are the only counties with in-migration of people older than 75 years old.

**Income**

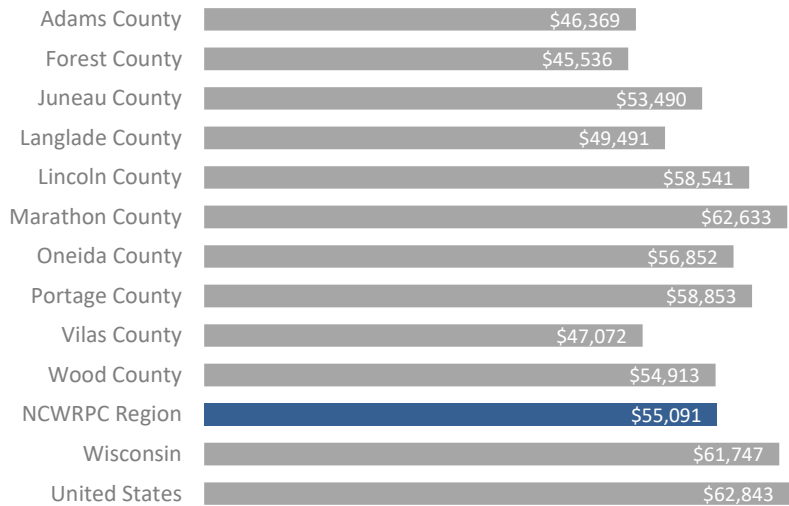
Per capita income provides a measure of relative earning power on a per person level. According to the ACS, the regional per capita income in 2019 was \$31,621, as shown in **Figure 1-6**. Per capita income within the Region ranged from \$25,700 in Forest County to \$34,910 in Oneida County. Overall, Oneida County was the Region’s only county to have a higher per capita income than the state and was also the only county within the Region to have a higher per capita income than the national average.

**Figure 1-6: Per Capita Income, 2019**



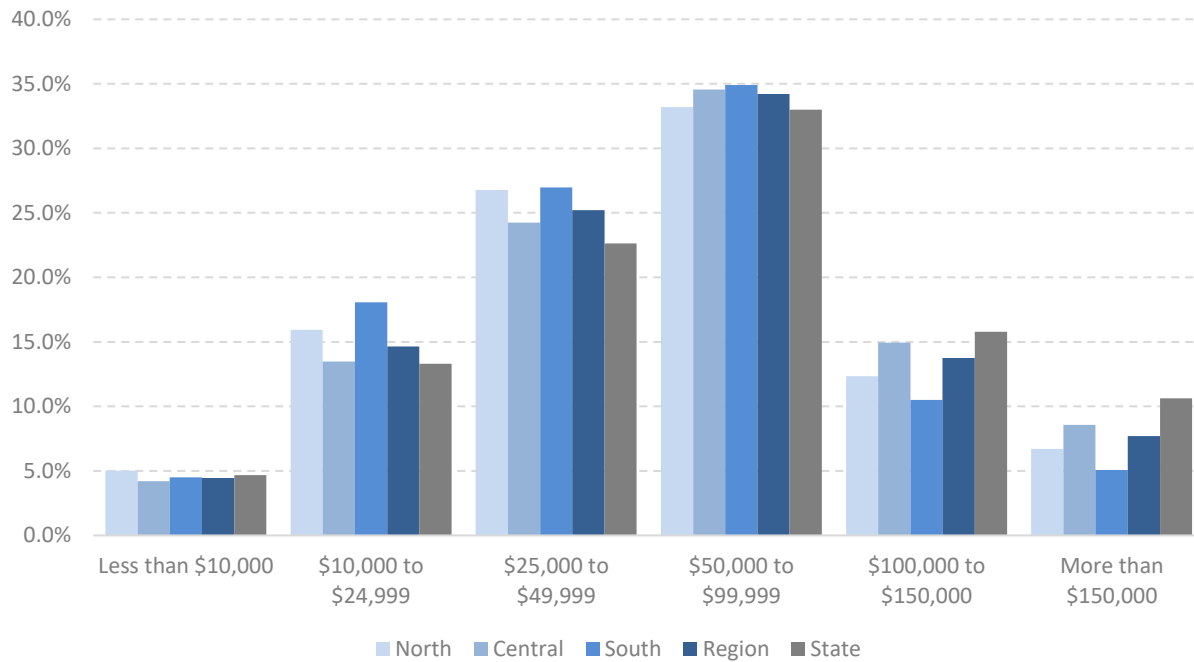
**Figure 1-7** displays median household income in 2019 for the Region, each of the Region’s ten counties and Wisconsin. The Region had a median household income of \$55,091 in 2019. The Region’s median household income in 2019 was lower than both the state’s median household income of \$61,747 and the nation’s median household income of \$62,843. Median household income within the Region ranged from \$45,536 in Forest County to \$62,633 in Marathon County. Marathon County was the only county within the Region that had a higher median household income than the state.

**Figure 1-7: Median Household Income, 2019**



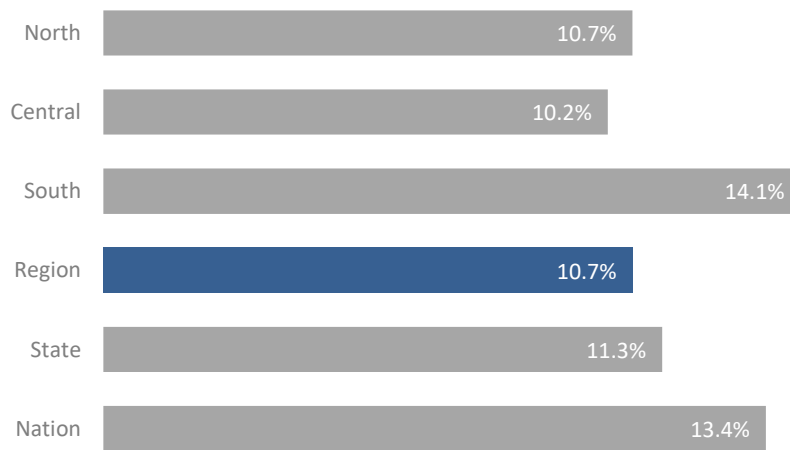
**Figure 1-8** displays the percentage of households who fall under each income bracket in 2019. About 4.5 percent of households within the Region made less than \$10,000 in 2019, slightly below the state average of 4.7 percent. However, the Region had more households earn less than \$25,000 in 2019 with 19 percent of regional households earning less than \$25,000, compared to the state average of 18 percent. The Region also had a lower percentage of households earn more than \$100,000 in 2019, as 21.5 percent of the region’s households earned more than \$100,000 in 2019, compared to the state average of 26.4 percent, indicating that earnings are slightly lower within the Region than in the state.

**Figure 1-8: Household Income Brackets, 2019**



In 2019, about 11 percent of the Region’s population was under the Federal Poverty Line (FPL). This is a slightly lower percentage than the state and national averages. **Figure 1-9** displays the poverty rates for the Region, sub-regions, state, and nation. Poverty rates within the Region ranged from 7.9 percent in Oneida County to 17.3 percent in Forest County. Generally, regional poverty rates were lowest within the Central sub-region and highest within the South sub-region.

**Figure 1-9: Percentage of Individuals Below the Federal Poverty Line, 2019**



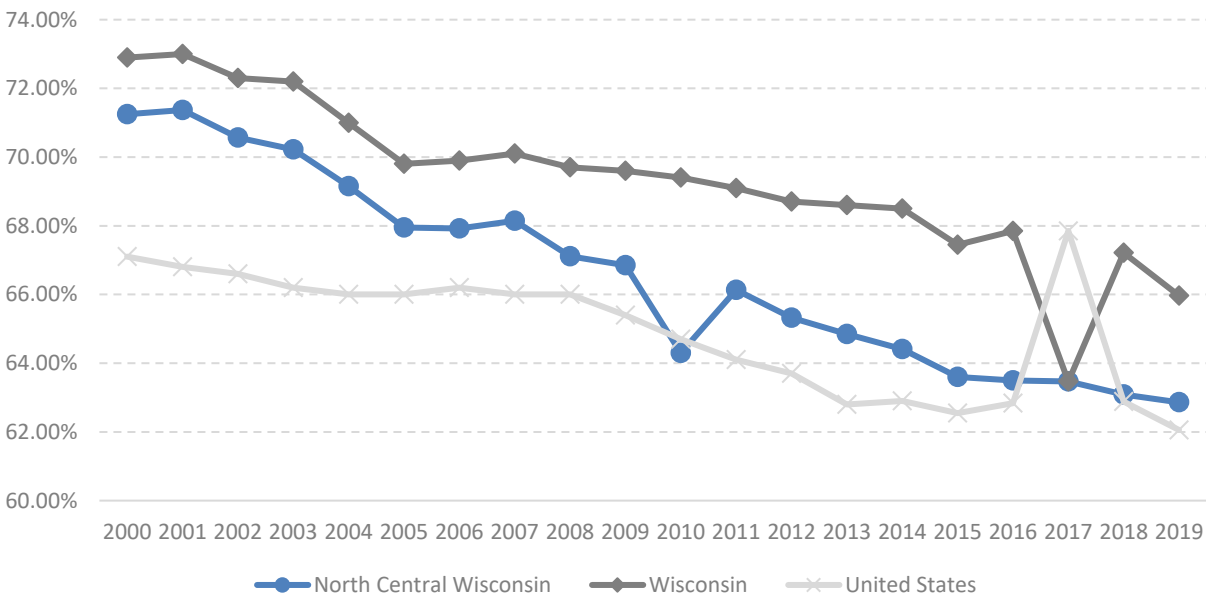
## Workforce

### Labor Force and Unemployment

The total Regional labor force is the population 16 years of age and older that is employed or actively pursuing employment. Persons sixteen and older who are students, homemakers, retired, institutionalized, or unable/unwilling to seek employment are not considered part of the labor force. According to the 2015-2019 ACS, the Region had a population of 360,090 persons over the age of 16 and a labor force consisting of 226,350 individuals. **Figure 1-10** compares the Region's labor force participation trends over the past twenty years with those of Wisconsin and the nation.

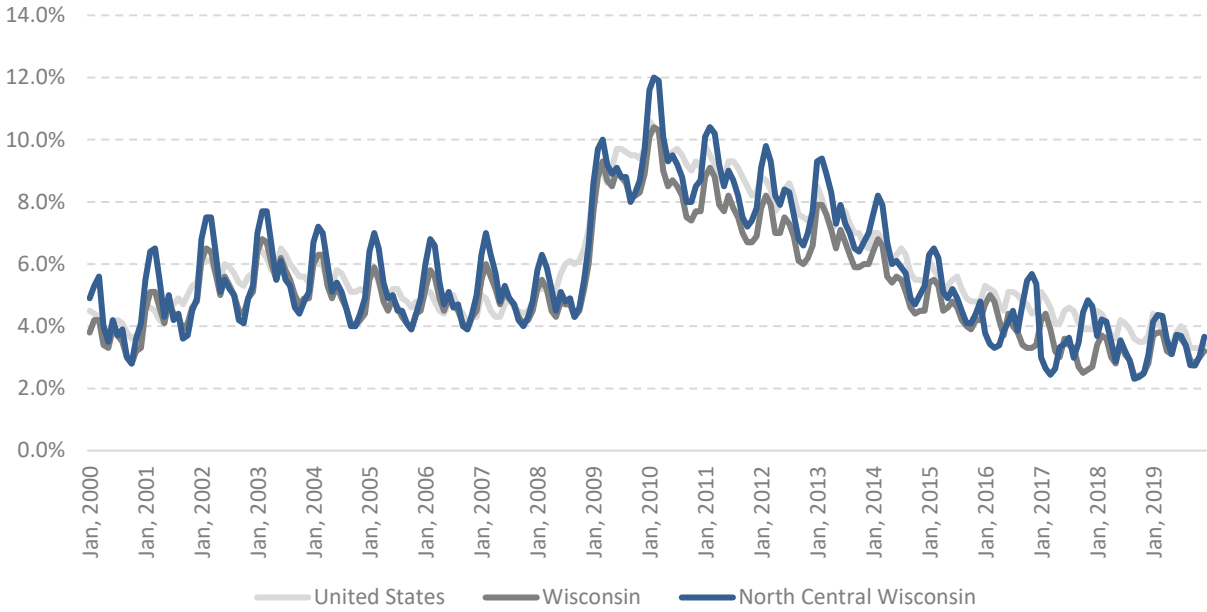
In 1980, only 61 percent of the population over 16 was in the labor force, and the Region's labor force participation rate increased to 67 percent by 2000. The Region's labor force participation rate has been steadily declining since 2000, and now sits at about 63% in 2019. This decline has been due to a variety of factors, such as lingering effects of the Great Recession and the subsequently high unemployment rates that came with it, and the increase in retirements within the Region due to the Region's aging population. Although unemployment levels have declined, labor force participation has remained lower as people retired early or did not continue looking for work. According to US Census LEHD data, approximately 26 percent of workers who live in North Central Wisconsin are 55 or older, so many of them will be dropping out of the labor force within the next 10 to 15 years.

**Figure 1-10: Labor Force Participation Rates 2000-2019**

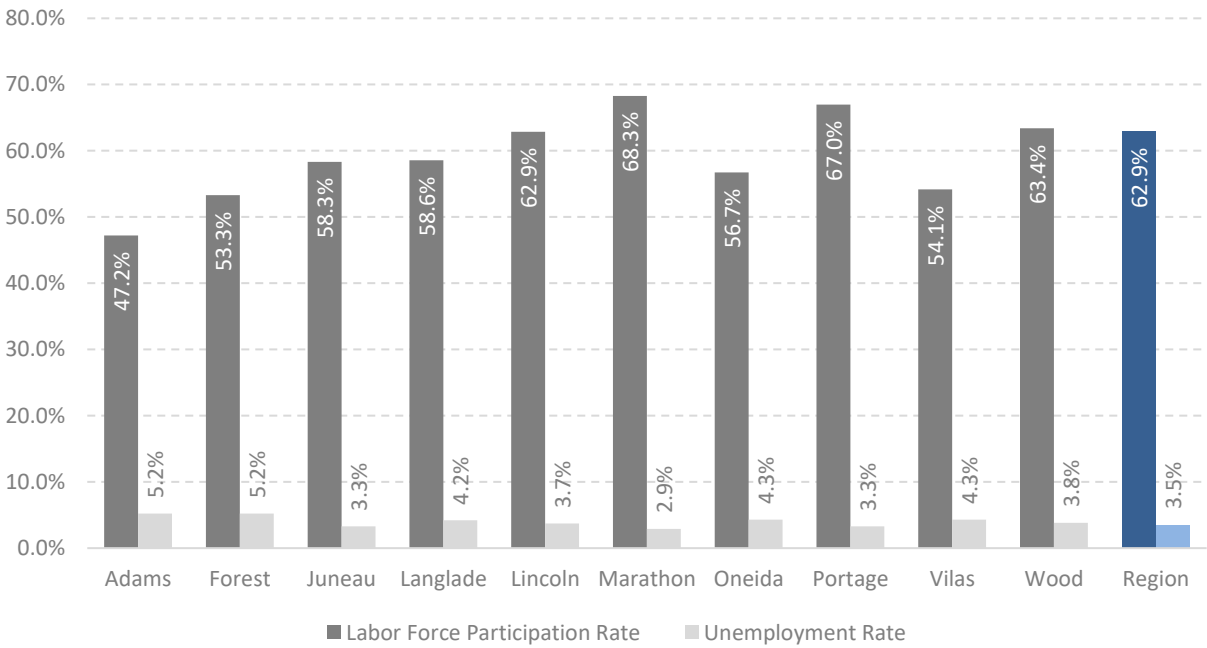


The unemployment rate in North Central Wisconsin fluctuates more seasonally than the rates for the United States and Wisconsin. This is largely due to the prominent tourism industry in the North and South sub-regions. As shown in **Figure 1-11**, the unemployment rate in the region has returned to pre-recession levels, after peaking in 2010.

**Figure 1-11: Unemployment Rates 2000 - 2019 - Not Seasonally Adjusted**



**Figure 1-12: Labor Force Participation and Unemployment**





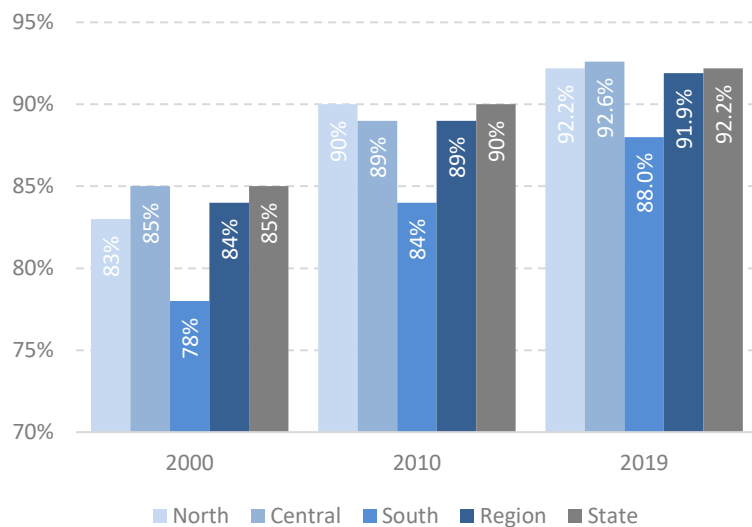
As shown in **Figure 1-12**, the counties within the Central sub-region have the highest labor force participation rates. Marathon (70.2%), Portage (67.6%) and Wood (65.1%) also make up 63 percent of the total population in the region; have the lowest percentage of residents over 65 years of age; and with the exception of Portage County, the highest percentage of residents under 17. Adams County has the lowest participation rate (47.2%) in the Region and the highest unemployment rate at 5.2 percent. Only four counties, Lincoln, Marathon, Portage, and Wood exceeded the state’s 62.06 percent participation rate in 2019. Labor force participation rates have generally declined slightly since the last CEDS update that used 2010 – 2014 ACS data.

Figure 1-12 shows self-reported labor force participation rates and unemployment rates. In general, the unemployment rates shown here are higher than the official unemployment rate released by the WI Department of Workforce Development. The three counties with the lowest labor force participation rate, Adams, Forest, and Vilas, also have some of the highest unemployment rates. Juneau, Marathon, and Portage Counties have the lowest self-reported unemployment rates in the region.

**Education**

Educational attainment levels have increased substantially in the Region from 1990 to 2019. In 1990, only 75.5 percent of the population 25 and over had completed four years of high school or more. By 2019, that rate increased to 91.9 percent, as shown in **Figure 1-13**. All three sub-regions also have seen a substantial increase in high school educational attainment levels. In 2019, the Central sub-region had the highest percentage of population who have completed four years of high school, followed by the North and South. Compared to the state, the Region lags behind slightly, but that gap has narrowed from a 5.0 percent deficit in 1990 to a 0.3 percent deficit in 2019.

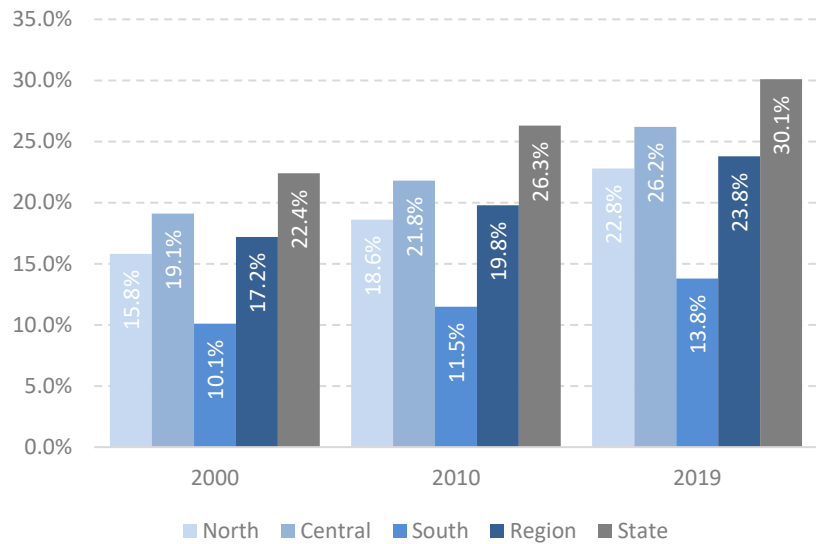
**Figure 1-13: Percent of Residents 25 and Over that Graduated High School**



The rate of persons with a bachelor’s degree or better is also increasing, but the Region still lags behind the state and the gap is widening. In 1990, 13.3 percent of the Region had a bachelor’s degree, compared to the state rate of 18.3 percent for a difference of 5.0 percentage points; meanwhile by 2019 the Region’s rate was 23.8 percent to the state’s rate of 30.1 percent. Educational attainment levels increased significantly for the Region despite it lagging further behind the state. All three sub-regions also have seen a significant increase in post-secondary educational attainment levels.

**Figure 1-14** displays the percentage of residents over the age of 25 who have attained a bachelor's degree or higher. In 2000, 2010 and 2019, the Central sub-region had the highest educational attainment rate for both high school and a bachelor's degree, followed by the North and South. As expected, due to the presence of a four-year university, Portage County has the highest proportion of residents with a bachelor's degree at 32.9 percent, followed by Vilas (29.1%) and Oneida (27.2%) Counties. Marathon County comes in slightly lower at 25.4 percent.

**Figure 1-14: Percent of Residents 25 and Over with a Bachelor's Degree**



Taken together these two education indicators show a Region that is improving its education attainment levels, but at a slower rate than Wisconsin as a whole and with a significant gap in higher education.

**Vocational and Technical Education**

As many industries, including manufacturing and agriculture, become increasingly technical and automated, technical educations are becoming increasingly necessary to obtain even entry level positions in many fields. A high school education is no longer sufficient to obtain a living wage in most cases.

About 11 percent of state residents age 25 and older have an associate's degree as their highest level of educational attainment. The region exceeds the state, as nearly 12 percent of the region's residents age 25 and older have achieved an associate's degree as the highest level of attainment, with six of the Region's counties exceeding the state proportion. The proportion of residents 25 and older with some college, but no degree (which includes technical certificates and other vocational training that does not result in a degree) is lower than Wisconsin and the United States. Approximately 21 percent of residents 25 and older in the region have some college. About 23 percent of residents ages 25 and older in both the North and South sub-regions have some college experience but no diploma, compared to about 19 percent in the Central sub-region. About 21 percent of State residents 25 and older have some college experience without a diploma.

Partnerships between local businesses, governments, and educational institutions are very useful in developing the Regional economy. In 2019, roughly 12 percent of the Region's population had completed an associate's degree (US Census). Institutions such as UW-Stevens Point, UW Marathon County and Wood County, Northcentral Technical College (NTC) (Wausau, Antigo, and Spencer), Midstate Technical College (Wisconsin Rapids, Adams, Stevens Point, and Marshfield), Nicolet College (Rhineland and Minocqua), and Western Wisconsin Technical College (Mauston) often

direct their programs to the training needs of local workers and businesses; and have developed two outreach centers: Wisconsin Learning Center (Stevens Point) and Northwest Wisconsin Manufacturing Outreach Center (UW-Stout campus). The Region's four technical colleges had a total enrollment of 46,180 during the 2018-19 school year; Mid-State (8,218), Nicolet Area (4,954), Northcentral (19,220), and Western Wisconsin Technical College (13,788). This is a decline of over 10,000 people since the total 2009-2010 enrollment of 56,219 people. Of those, 21,842 were enrolled for an associate's degree, 4,245 were enrolled for a technical diploma, and 18,098 were enrolled as a vocational adult. (Wisconsin Technical College System Fact Book 2018-2019).

### **Skills and Labor Gaps**

Skills and labor gaps are becoming increasingly prevalent problems in the current economy, employers in many industries, such as manufacturing, health care, and information technology, are having difficulty finding qualified workers to fill open positions. At the same time unemployment levels in parts of the North central Region are significantly higher than the state average. Additionally, future population projections show a significant decline in the labor force over the next 25 years as baby boomers retire. The North Central Wisconsin Regional Livability Plan projects a 16,000-person labor shortage by the year 2025 if current population trends and commuting patterns continue. This labor shortage is enhanced by the migration trends described earlier in the chapter.

Worker productivity has often been cited as one important reason for the strength of Wisconsin's economy. Education and training are critical to maintaining that productivity, as well as keeping our Region competitive. The state provides a variety of initiatives to develop the workforce through education, training, and cooperative ventures with business and industry. Worker training programs are very important as the location mismatch between worker skills and available jobs continues to widen.

Employment and training services for dislocated workers are primarily delivered through "Job Centers". There are job centers located throughout the Region. These centers are one-stop resources for employers to meet their workforce needs and job seekers to get the career planning, job placement, and training services they need to obtain jobs.

Organizations such as the North Central Wisconsin Workforce Development Board and the Western Wisconsin Workforce Development Board are important to this process as well. The North Central Wisconsin Workforce Development Boards is comprised of nine of the ten counties (all except Juneau) in the North Central Region and offers workers access to training programs, business services and industry information and advocates the development, support, and coordination of an integrated service delivery system that develops a skilled workforce in the Region. The Western Wisconsin Workforce Development Board provides similar services to the region that includes Juneau County.

## **Chapter 2: Regional Economy**

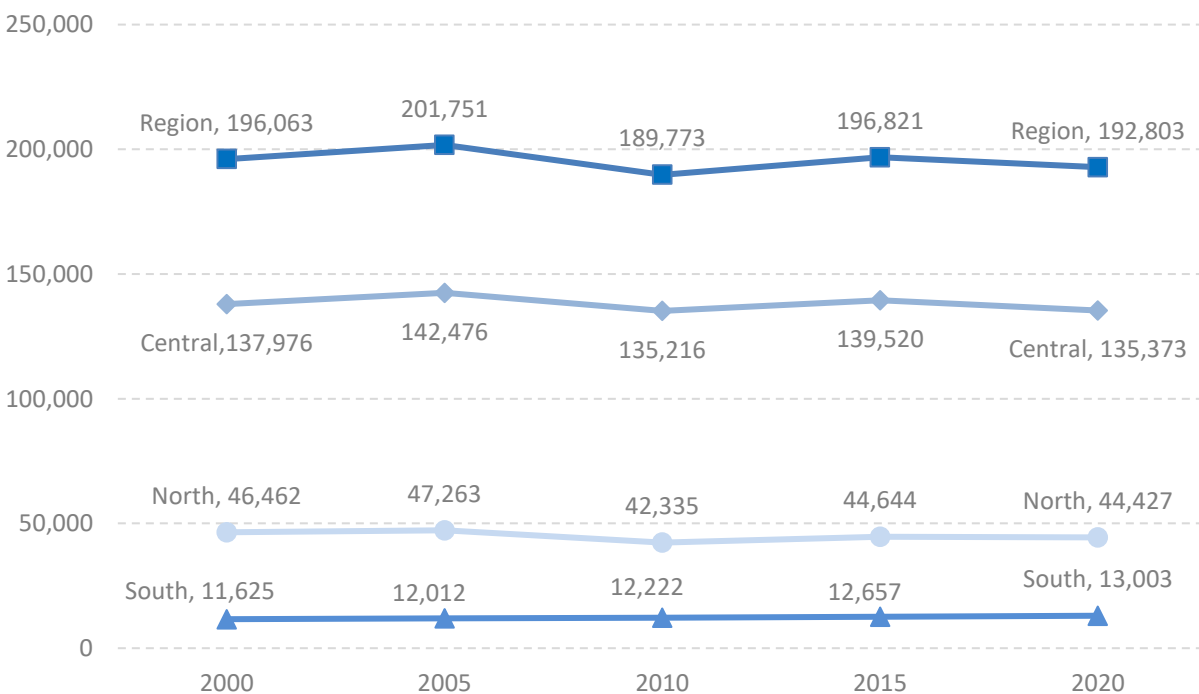
This chapter explores the condition of the Region’s economy. This includes changes in employment by sector, regional unemployment trends, the Gross Regional Production, and the out-of-region exporting of sectors. The assessment also includes a location quotient quadrant analysis as well as a regional cluster analysis. The sector concludes with a look at tourism, entrepreneurship and future employment projections in the region.

### **Employment**

Employment statistics here are provided by the Wisconsin Department of Workforce Development, and only include QCEW employees. The QCEW does not account for certain types of employment, such as railroad and military workers, and does not capture self-employed individuals. EMSI provides estimates for the number of non-QCEW jobs and self-employment, which adds approximately 25,000 employees in our region in 2020, most of which fall under the construction and crop and animal production industries, but many other industries have a noticeable proportion of estimated workers that are not covered under the QCEW.

In 2020, there were 192,803 jobs in the region. **Figure 2-1** shows that between 2010 and 2020 the region had a net gain of approximately 3,000 jobs. Jobs started increasing marginally again in 2011 but have still not reached pre-recession levels, when employment within the Region was 201,751 in 2005. Jobs are expected to increase over the next 10 years, as shown later in the chapter in Table 2.

**Figure 2-1: Regional Jobs Change 2000-2020**



Between 2000 and 2007, the number of jobs increased by approximately 8,900. During the recession, from 2007 to 2011, approximately 15,000 jobs were lost within the region. Post-recession, the number of jobs in the region increased by 4,501 jobs between 2011 and 2015. However, the region lost nearly 4,000 jobs between 2015 and 2020, decreasing to a total of 192,803 jobs in 2020. Most of these jobs were lost within the Central sub-region, as employment in the Central sub-region decreased from 139,520 jobs in 2015 to 135,373 jobs in 2020, a loss of 4,147 jobs. The South sub-region added 346 jobs during this time, while the North sub-region lost 217 jobs.

### **Employment by Sector**

Between 2015 and 2020, 12 out of 20 of the Region's industry sectors gained jobs, indicating that a majority of the Region's employment sectors experienced increases in jobs during this time. The three sectors with the highest employment in the region in 2015 were manufacturing, healthcare and social assistance, and government, each providing over 30,000 jobs.

Manufacturing has continued to add jobs since the end of the recession and is the top employer within the region. As the region's largest exporter of goods and services, this industry is crucial to the economic health of the region. During the past five years, 2015 to 2020, jobs in this industry have increased from 34,878 to 37,944. However, in 2005, this industry employed 39,538 people. The average wage of \$65,624 within the manufacturing sector is significantly higher than the Region's average wage of \$55,001 across all sectors. While this industry is going through several major transitions in this region, it is expected to continue to grow during the next ten years. Nonetheless, this industry faces the challenges of an aging workforce, foreign competition, and changing consumer preferences.

The Health Care and Social Assistance continues to be the second highest employer industry, as it has been for the last 20 years. The Health Care and Social Assistance industry increased in employment by three percent from 2015 to 2020, accounting for 30,617 jobs in 2020. However, this is still a lower number of jobs within the Health Care and Social Assistance industry than in 2010, when there were 31,699 jobs within the sector. This indicates that employment within the industry decreased between 2010 and 2015. Prior to the decrease between 2010 and 2015, the Health Care and Social Assistance sector had been the fastest growing industry during the first decade of the new millennium. Similar to the manufacturing sector, the average earnings in this sector (67,356) are significantly higher than the regional average, but the industry only produces a fraction of the sales in exports that the manufacturing does. While rural regions have had a difficult time attracting health care professionals, over the past several years there has been a concentrated effort by local leaders to train and retain medical practitioners in the area.

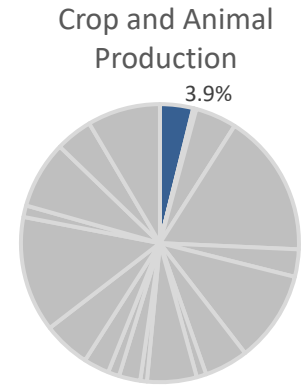
The Government sector is the Region's third largest employment sector, accounting for 30,421 jobs within the region. The Government sector experienced a two percent decline in employment from

2015 to 2020, losing 543 jobs. Similar to both the manufacturing and health care sectors, this sector provides average wages (\$64,633) that are significantly higher than the regional average wage.

***Crop and Animal Production:***

The Crop and Animal Production sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.

Between 2010 and 2020, this sector saw employment decrease by nearly three percent, with the majority of that decline occurring between 2015 and 2020. This industry added 729 jobs between 2010 and 2015 but lost 969 jobs between 2015 and 2020. Nearly 8,759 persons are employed in this sector which accounts for eight percent of total employment in the Region. The location quotient for this industry is 3.32, meaning it is highly concentrated in the North Central Region compared to the rest of the United States.

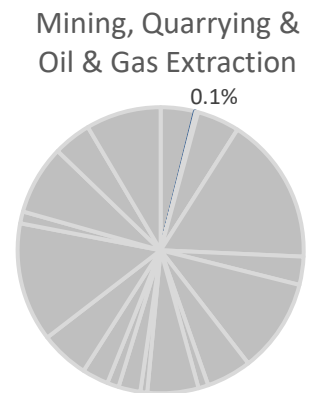


However, according to the UW-Extension in Marathon County, more jobs do not mean the industry is growing. With the low prices for dairy and agricultural commodities in 2019, increased rent for cropland, increasing farm debt, and aging farmers, many farms have been consolidated across the Midwest. As farms get larger, they need more farmhands. Farm operators are not counted in the QCEW but the farm hands are. In other words, more agriculture workers are being counted than previous years rather than the actual existence of more farm workers.

The Region’s climate, soil, and water are well suited for the dairy industry, and the production of potatoes, oats, barley and hay, snap beans, green peas, sweet corn, soybeans, cranberries, ginseng, and trees. The timber produced in the area, both hard and soft wood, supplies the lumber mills, the pulp and paper mills, the millwork and housing components industries and the factory-built housing industry.

***Mining:***

The mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.



Non-metallic mining activity within the Region typically involves sandstone and gravel extraction for local use and some granite

quarrying. Metallic mining has been of minor importance in the Region over the last two decades. There are a few substantial metallic deposits located in the Region, if any of these mines would open, then this sector may have a substantial impact within the Region.

The North Central Region had an increase of 51 jobs within the mining sector from 2010 to 2020 resulting in a 34 percent increase in mining employment. In 2010, there were 150 workers in this sector. This number increased to 214 in 2015 before dropping back to 201 workers in 2020. This sector accounts for 0.1 percent of the workforce in our region.

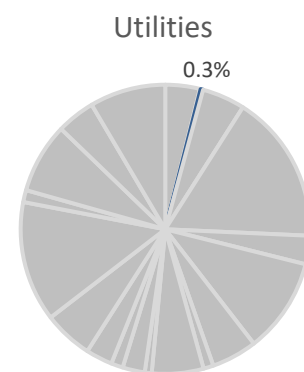
In 2013, Wisconsin had seen there had been a dramatic increase in the number of frac sand mining and operation facilities. This increase was attributed to a surge in hydraulic fracturing (fracking), a technique used by the petroleum industry to extract natural gas and/or crude oil from rock formations, which requires a certain quality of sand in the process. According to the United States Geological Survey, Wisconsin was the number one producer of frac sand in 2014, with 24 million metric tons. That same year, oil prices plummeted across the global as Saudi Arabia ramped up production. Hydraulic fracturing was no longer an economically viable endeavor and 19 mining operations in Wisconsin have gone dormant since this time.

According to the Wisconsin Department of Natural Resources, in 2016, there were 11 locations of industrial sand mines and processing plants in the North Central Wisconsin. All mines were in Wood County, with three sites inactive and one working toward reclamation.

### *Utilities:*

The utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.

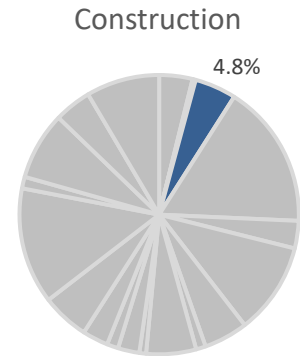
Over the past 10 years employment in the utilities sector has grown by 24 percent adding 124 jobs. The location quotient of 0.83 shows that the utilities sector is not highly concentrated in the region. Overall, the utilities sector accounts for 0.3 percent of the region's employment.



**Construction:**

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

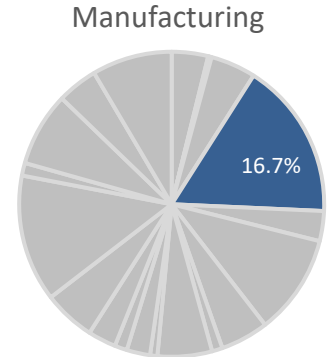
Over the past 10 years the region has experienced a surge in construction jobs. Between 2010 and 2020 the region experienced a 12 percent increase in employment in the construction sector, adding 1,187 construction jobs during this time. Most of this growth occurred in the past five years, as the region has added 883 construction jobs since 2015. In 2020, there were 10,916 persons employed in this sector which equates to roughly five percent of total employment within the region.



**Manufacturing:**

The manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The assembling of component parts of manufactured products is considered manufacturing, except in cases where the activity is appropriately classified as construction.

Manufacturing is the largest employment sector within the North Central Region with roughly 38,000 employees in this sector. Between 2010 and 2020, this sector experienced a surge in employment, adding 5,491 jobs, a 17 percent increase, during this time. However, the Region is currently experiencing considerable loses in one of the top Manufacturing sub-industries –paper and packaging products – with major regional paper mills such as the Domtar Paper Mill in Port Edwards, Wausau Paper in Brokaw, and Verso Paper in Wisconsin Rapids recently shutting down.



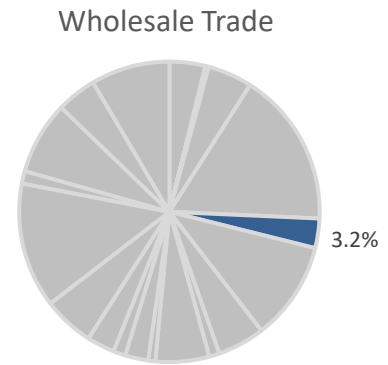
Traditionally paper production has been the dominant manufacturing subindustry in the region, both in terms of employment and revenues. Paper mills have flourished across Wisconsin for over one hundred years in ample forests for supplies and water flows to power them. Wisconsin is largest paper producer in the country. However, this industry has been seeing a decline in demand since the 1990s with the rise in email, annotatable PDFs, digital calendars, e-books and paperless billing. Furthermore, the state is facing fierce prices wars with foreign competitors, such as China. Over the next ten years, more employment losses are expected. The most recent closure of a mill was the Verso Mill in Wisconsin Rapids, where 900 jobs were lost.



**Wholesale Trade:**

The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

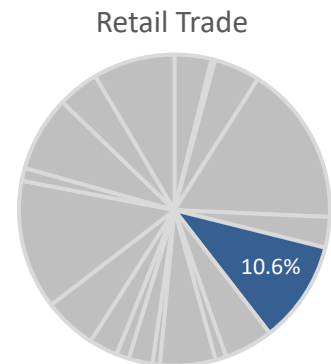
Between 2010 and 2020, this sector saw employment decrease by 4 percent, losing 320 jobs during this time. It should be noted that this sector saw an increase in jobs between 2010 and 2015, indicating that the jobs losses in this sector have occurred over the past five years. Of these jobs were lost in the past five years. In 2020, there were 7,233 persons employed in this sector which accounts for three percent of total employment within the Region.



**Retail Trade:**

The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and non-store retailers.

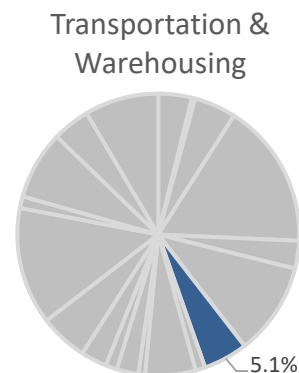
Between 2010 and 2020, this sector decreased by ten percent. In 2020 there were 24,141 persons employed in this sector, accounting for over ten percent of total employment, making it the region’s third largest employment sector.



**Transportation and Warehousing:**

The transportation and warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.

From 2010 to 2020 this sector increased in employment by ten percent, adding 1,113 jobs within North Central Wisconsin. Most of these jobs have been added over the past five years, as the region has gained 976 jobs in this sector since 2015. There were 11,589 persons

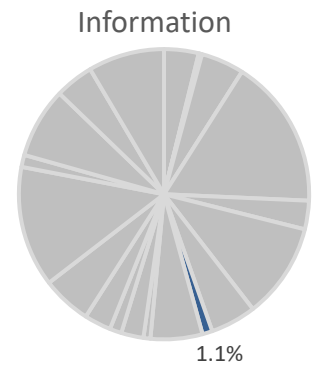


are employed in this sector in 2020, accounting for five percent of the region’s employment.

**Information:**

The information sector comprises establishments engaged in the following processes: producing and distributing information and cultural products, providing the means to transmit or distribute these products as well as data or communications, and processing data. The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; Web search portals, data processing industries, and the information services industries.

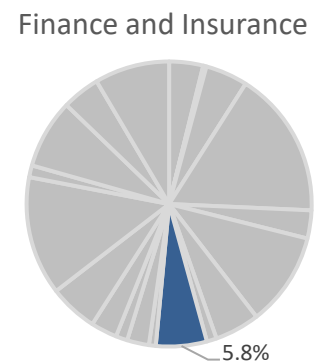
Between 2010 and 2020 employment within the Information sector slightly increased, adding 17 jobs. The lack of broadband infrastructure is a critical issue throughout the region, especially in the rural areas, and as this infrastructure develops the information sector is likely to increase. This sector now accounts for over one percent of the region’s work force.



**Finance and Insurance:**

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions.

From 2010 to 2020 this sector grew by over seven percent regionally and has remained stable with a 3.8 percent increase over the past five years. Employment in this sector accounts for nearly 6 percent of the region’s employment 13,122 persons working in the finance and insurance industry.

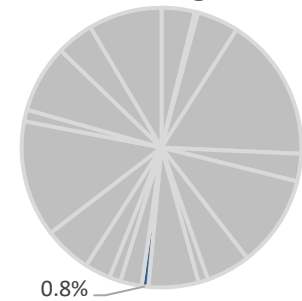


### ***Real Estate & Rental & Leasing***

The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

From 2010 to 2020 employment within this sector increased by over nine percent, adding 151 jobs. The sector is steadily recovering from its decline from 2005 to 2015 that resulted from the housing crisis in 2008 and the recession that ensued shortly thereafter. With 1,751 people employed in this sector within the region in 2020, the Real Estate and Rental Leasing sector now has more persons employed than before the Great Recession of 2008.

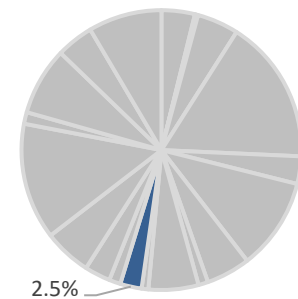
Real Estate and Rental Leasing



### ***Professional & Technical Services:***

The professional, scientific, and technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. Activities performed include legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

Professional Services

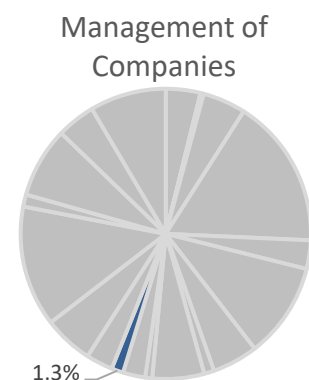


Between 2010 and 2020 employment in this sector grew by over twelve percent within the Region. The sector has added 611 jobs since 2010, with 335 of these jobs being added between 2015 and 2020. The professional and technical services sector now accounts for 2.5 percent of employment within the Region.

### ***Management of Companies & Enterprises:***

The management of companies and enterprises sector comprises establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or non-governmental establishments that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. Establishments that administer, oversee, and manage may hold the securities of the company or enterprise.

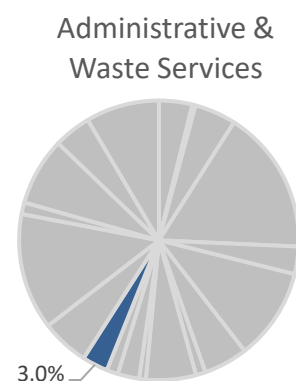
Regional employment within the Management of Companies and Enterprises sector has nearly doubled since 2010, growing by 98 percent during this time, resulting in 1,485 jobs being added within this sector over the past decade. The majority of these jobs were added between 2010 and 2015 when the Region gained 1,081 management jobs. Although the Region had a significant increase, this sector still comprises a small percentage of all employment, making up just 1.3 percent of the Region's employment.



### ***Administrative & Waste Services:***

The administrative and waste management sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

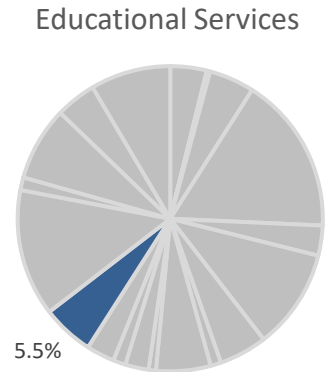
Regional employment within the sector increased by over 27 percent between 2010 and 2020, adding 1,450 jobs during this time. There were 6,777 persons working in this industry in 2020, making up three percent of the Region's workforce.



### ***Educational Services***

The educational services sector is comprised of establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and/or accommodation services to their students.

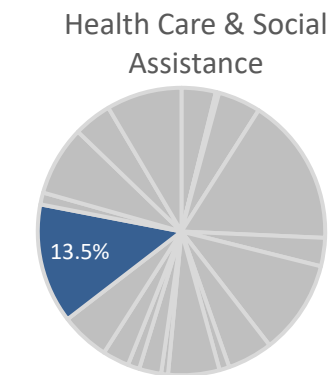
Between 2010 and 2020 the educational services sector decreased in employment by about 2 percent, losing 228 jobs, indicating that this sector has yet to rebound from the Great Recession in 2008. The education services sector employs 12,508 persons in the Region, representing about 5.5 percent of the Region’s workforce.



### ***Health Care & Social Assistance:***

The health care and social assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance.

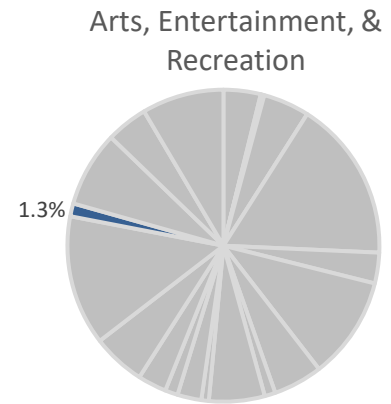
With 30,617 persons employed in this sector, the health care and social assistance sector is the second largest sector in the region and accounts for over thirteen percent of the Region’s employment. From 2010 to 2020, this sector lost 1,211 jobs, but these losses occurred between 2010 and 2015. This sector has gained most of these jobs back since 2015, adding 1,027 jobs over the past five years.



For years, the shortage of physicians in rural areas has been a concern. According the U.S. Department of Health and Human Services, seven out of ten of the counties in North Central Wisconsin had shortages of physicians and psychiatrists. Leaders in north central Wisconsin have teamed up with Medical College of Wisconsin to create the new North Central Medical School and Psychiatric Residency Program in Wausau. The program started in July of 2016 and had 26 students in the inaugural class. Another program in Green Bay opened simultaneously. The training of physicians in the state is essential, as most settle in the area of their residency.

***Arts Entertainment & Recreation:***

The arts, entertainment, and recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

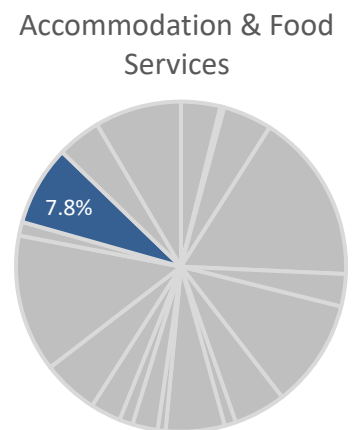


Between 2010 and 2020 this sector experienced a significant increase in employment, with a 35 percent growth rate during this time. The region has added 785 jobs in this sector over the past decade, with a majority of these jobs (719) being added between 2015 and 2020. Despite the rapid growth within this sector, this sector only accounts for one percent of employment in the Region, employing 3,051 people in 2020. The industries of this sector are often referred to as “creative industries.” According to the United Nations 2008 Creativity Report, creative industries can be defined as cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs. These arts-centric businesses play an important role in building and sustaining economic vibrancy. They employ a creative workforce, spend money locally, generate government revenue, and are a cornerstone of tourism and economic development.

The creative economy emphasizes competition for human talent rather than competition for business and industries. While communities continue to view arts, culture, and the creative economy as an integral part of their quality of life and development, the complementarities with innovation and entrepreneurship, manufacturing and industry, natural resourced-based development, tourism development, and workforce development, among others, is becoming increasingly apparent.

***Accommodation & Food Services:***

The accommodation and food services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.

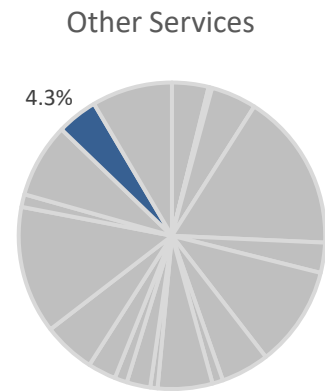


From 2010 to 2020 North Central Wisconsin experienced a four percent growth in this sector. Accommodations and Food Services is one of the larger sectors in the Region with 17,819 persons employed, accounting for eight percent of regional employment.

***Other Services except Public Administration:***

The other services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grant making, advocacy, and providing dry cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

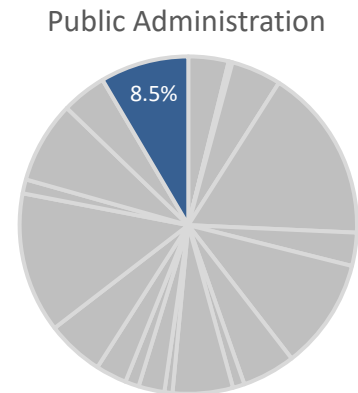
Between 2010 and 2020 this sector experienced a rapid decline in employment, losing 1,566 jobs during this time, which represents a decrease of 14 percent. The sector now employs 9,784 workers and comprises over four percent of the Region’s employment.



***Public Administration:***

The public administration sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area. These agencies also set policy, create laws, adjudicate civil and criminal legal cases, provide for public safety and for national defense. In general, government establishments in the Public Administration sector oversee governmental programs and activities that are not performed by private establishments.

With 19,303 persons employed, the Public Administration sector is the Region’s fourth largest employment sector, accounting for over thirteen percent of the Region’s workforce. Despite being the Region’s fourth largest employment sector, the Public Administration sector has experienced a steady decrease in employment within the Region over the past decade, as the Region lost 1,129 Public Administration jobs during this time, representing a 5.5 percent decrease in employment.

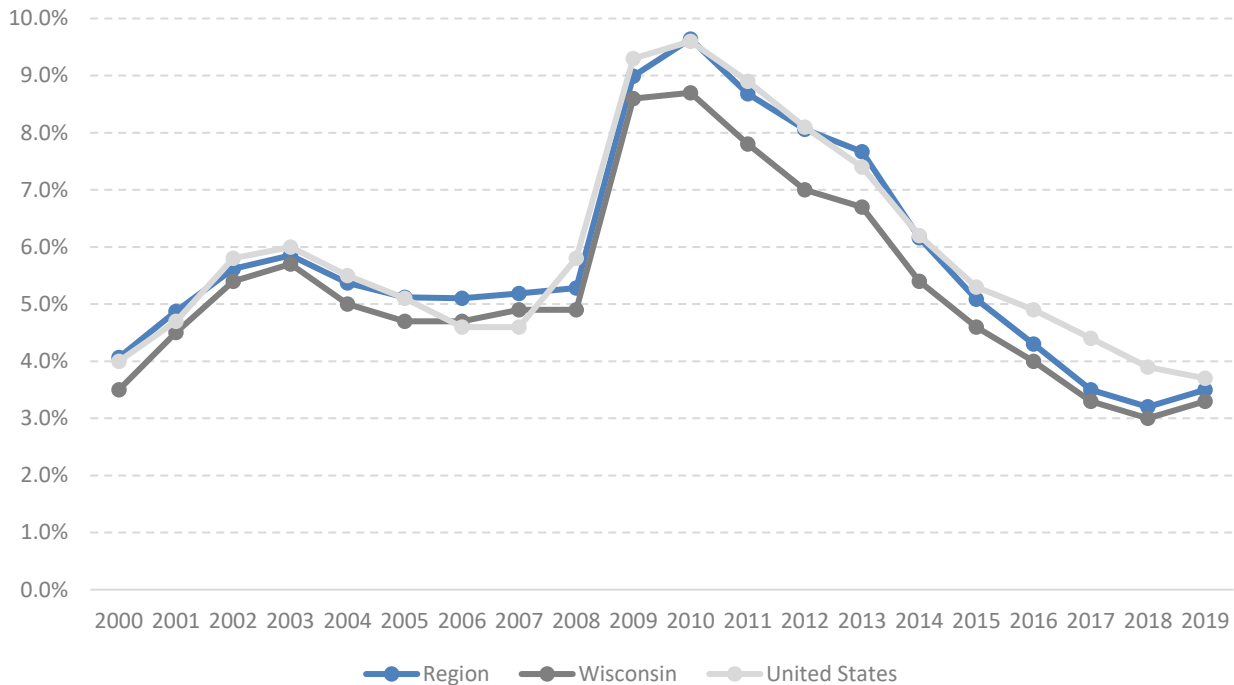


**Unemployment**

The Regional unemployment rate has been slightly greater than the state unemployment for the past 19 years, but mirrors both state and national trends. Unemployment was at its highest in 2010, at 9.6 percent and the lowest in 2018, at 3.2 percent. **Figure 2-2** displays the trends in unemployment for the Region, the State of Wisconsin, and the United States between 2000 and 2019. After a spike in

unemployment between 2007 and 2010, our Region has experienced a steady decline in unemployment over the past decade.

**Figure 2-2: Region, State and United States Annual Unemployment Rate, 2000-2019**

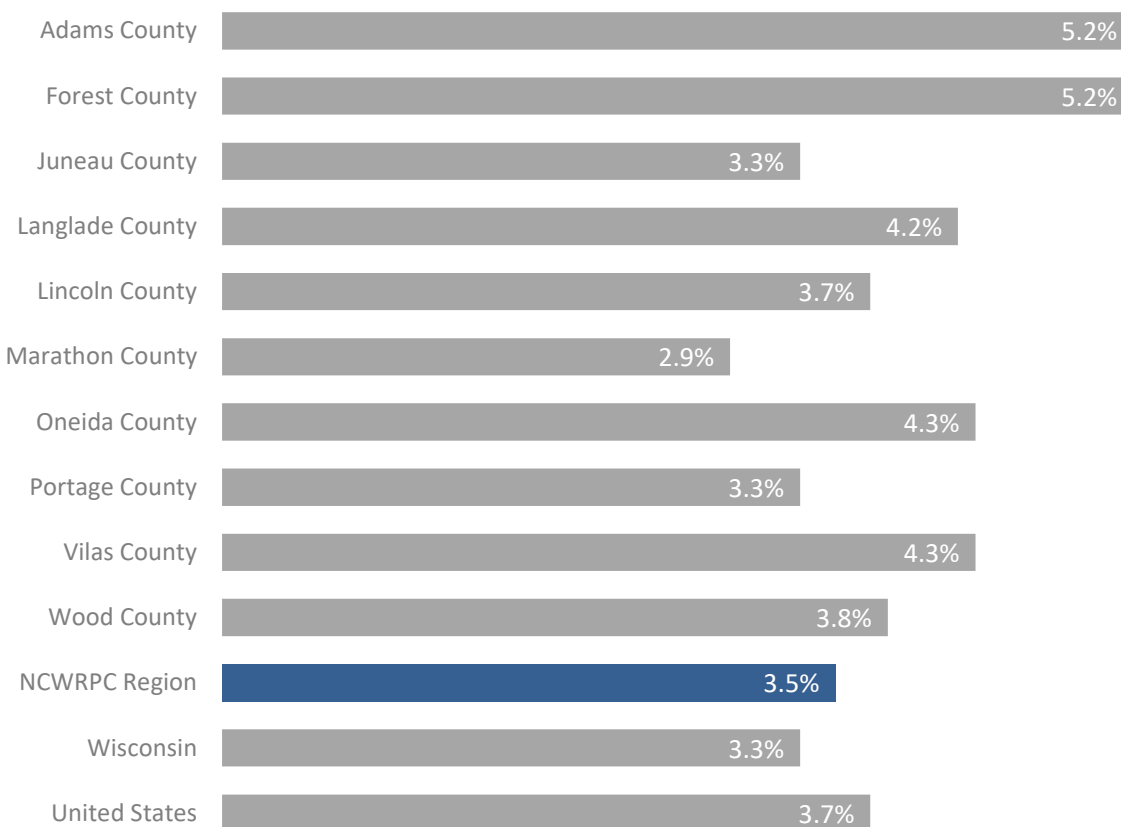


In 2019, the regional unemployment rate was 3.5%, with 7,982 members of the Region’s labor force being unemployed. In comparison, the Wisconsin unemployment rate was 3.3 percent, and the National unemployment rate was 3.7 percent. The Regional unemployment rate in 2019 was slightly higher than the unemployment rate of 3.2 percent in 2018 but is still significantly lower than the Regional unemployment rate of 9.6 percent at the start of the decade in 2010.

Within the region, unemployment rates in 2019 ranged from 2.9 percent in Marathon County and 5.2 percent in Adams and Forest Counties, as shown in **Figure 2-3**. Marathon County had an unemployment rate lower than the state, Juneau and Portage Counties had unemployment rates equal to the state rate, while Adams, Forest, Langlade, Lincoln, Oneida, Vilas, and Wood all had rates higher than the nation.



**Figure 2-3: Average Annual Unemployment Rate-2019**



**Gross Revenue Product**

The total Gross Regional Product (GRP) in 2019 was over 20.7 billion dollars in the region. By industry, Manufacturing was the highest grossing industry, producing nearly 4.4 billion dollars, or 21.2 percent of the area’s GRP. The Paper (except Newsprint) Mills produced roughly 16 percent of the Manufacturing industry’s GRP. The Finance and Insurance industry was in second place, producing roughly 2.6 billion dollars, or 12.6 percent of the GRP. Half of this amount was created in the Direct Property and Casualty Insurance Carriers subindustry. This was followed by the Health Care and Social Assistance industry which generated 2.5 billion and the Health Care and Social Assistance industry which generated roughly 2.1 billion dollars in revenues.

**Exporting**

In 2019, the region produced 28.8 billion dollars in annual sales to industries and consumers outside of the region. Manufacturing was the largest exporter in the region, with 12.0 billion dollars in export sales, which was roughly 87.3 percent of its total annual sales. Leather and Allied Product Manufacturing, Machinery Manufacturing, Paper Manufacturing, and Printing and Related Support Activities all exported over 95 percent of their annual sales.

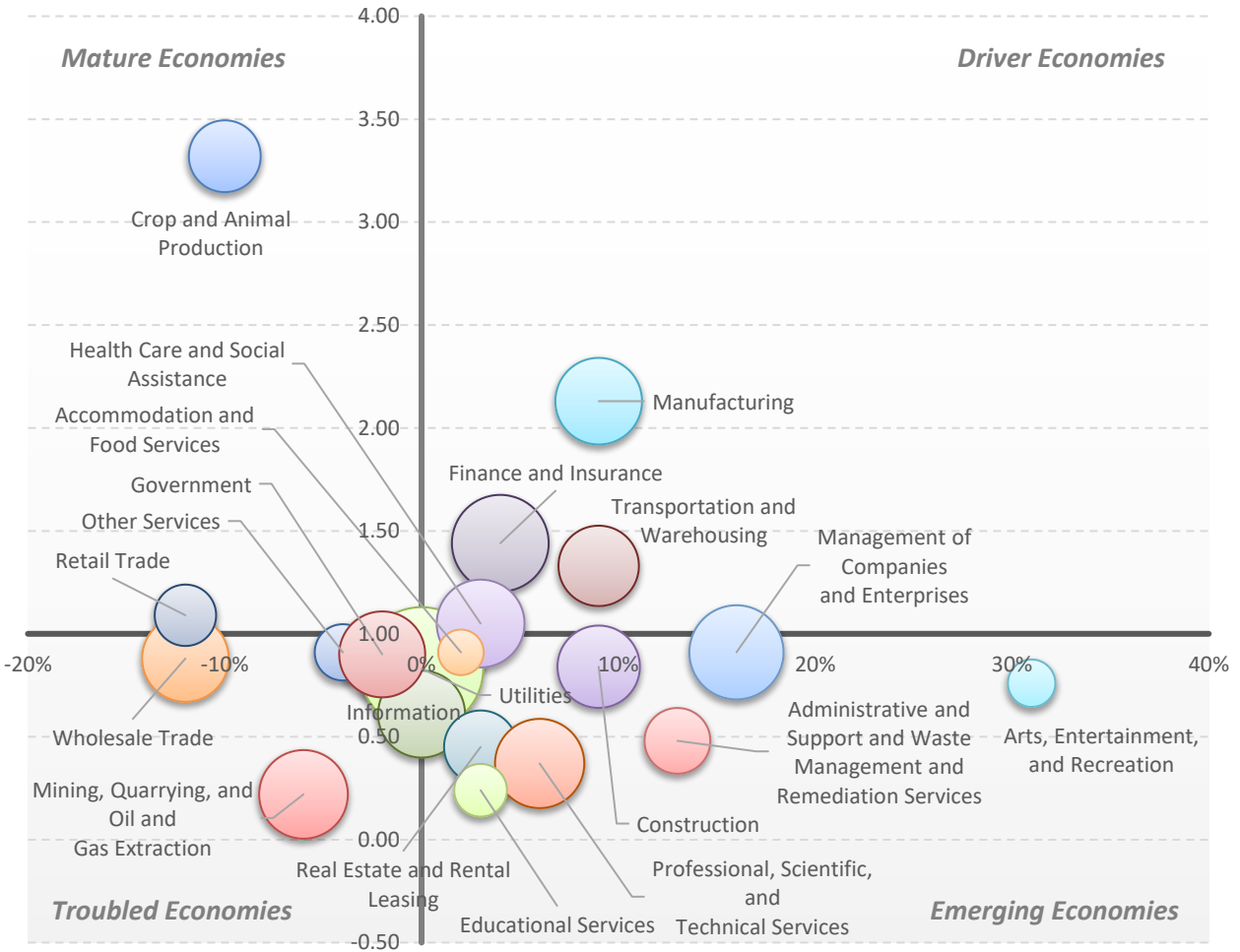
Public Administration was the second largest exporter with 4.4 billion dollars, followed by Finance and Insurance with 3.1 billion dollars. The Health Care and Social Assistance Industry exported 1.8 million dollars in sales. Crop and Animal Production Industry exported 1.9 billion dollars in sales which was 60.5 percent of its annual sales.

### **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 industrial 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 to identify exporter industries. Export industries are the drivers of the local economy. Any industry with a location quotient value greater than one is considered to be an exporter and the higher the location quotient, the greater the concentration of jobs. Non-exporter industries have location quotients lower than one. While non-exporter industries are less concentrated and are not major drivers of the local economy, they are important for economic diversity and possibly have the potential to grow.

The relative strength of a regional industry can be determined using a quadrant analysis. By examining the size and change over time of a location quotient value, mature, driver, troubled, and emerging industries can be identified by their quadrant position. The figure below displays a quadrant analysis for 2019 location quotients for metro area industries on the vertical axis and the percentage change from 2015 to 2019 on the horizontal axis. The size of each bubble in the figure represents the average earnings in each respective industry. The following section explains the differences in these economies and categorizes the region's industries.

Figure 2-4: Location Quotient Analysis, 2015-2020



**Driver Economies:**

Driver industries have above average job concentration and are expected to increase in employment. These industries are “standouts” or drivers that distinguish the regional economy and are doing so more every year – and they are especially important if they employ a high number of people. Driver industries are those that play a key role in the economic vitality of a region by supplying quality - often high-paying - jobs while also supporting job growth in other industries. These industries function as the primary engines for economic growth and stability because they export products and services and import vital dollars into the region. The driver sectors within the North Central Wisconsin Region include: 1.) Manufacturing, 2.) Transportation and Warehousing, 3.) Finance and Insurance and 4.) Health Care and Social Assistance. All four of the region’s driver industries currently employ more than 10,000 workers and offer wages significantly higher than the region’s average wage.

### *Mature Economies:*

Mature industries have above average job concentration within the Region but are experiencing decreases in employment over time, possibly affecting the export base. Identifying the Region's Mature Industries serves as an important warning that the Region is losing a major part of its export base and should form planning and investment priorities accordingly. There are currently two Maturing Industries within the Region: 1.) Crop and Animal Production and 2.) Retail Trade.

### *Troubled Economies:*

A troubled economy is less important to the regional economy and is declining, potentially impacting diversity. These industries have low employment, are less concentrated within the Region than average, and have experienced decreases in employment over time. Troubled Industries are warning signs that the Region needs to attract more businesses in those industries in order to maintain an economy that is sufficiently diversified and resilient in comparison to the national economy. There are currently four Troubled Industries within the Region: 1.) Wholesale Trade, 2.) Mining, Quarrying, and Oil and Gas Extraction, 3.) Other Services (Except Public Administration), and 4.) Government.

### *Emerging Economies:*

Emerging industries are industries that are not yet as concentrated in the region as they are at the national level but are increasing their employment over time. If these industries continue to grow, they will eventually become driver industries, and will contribute more to the Region's economic base. The Region's Emerging Industries include: 1.) Management of Companies and Enterprises, 2.) Construction, 3.) Accommodation and Food Services, 4.) Utilities, 5.) Information, 6.) Real Estate and Rental Leasing, 7.) Administrative Support and Waste Management and Remediation Services, 8.) Professional, Scientific, and Technical Services, 9.) Arts, Entertainment, and Recreation, and 10.) Educational Services.

### **Regional Cluster Analysis**

Clusters are a geographic concentration of interconnected companies, specialized suppliers, service providers and associated institutions in a particular field. Clusters develop because they increase the productivity with which companies can compete in an increasingly more competitive global market and they are the source of jobs, income and export growth. Clusters give businesses an advantage by providing access to more suppliers and customized support services, skilled and experience labor pools, and knowledge transfer through information social exchanges. In short, clusters enhance competitiveness.

An economic cluster analysis groups related subindustries together and compares these "clusters" to others in the region, based on five factors: earning, growth, regional competitiveness, regional specialization, and GRP. The clusters are given a score based on each of these factors.

Top clusters are those that drive wealth creation in the region, primarily through the export of goods and services. Using EMSI, 59 clusters were identified in the North Central Region. The average cluster score was 36 out of 100. The top and bottom clusters were determined by applying the average deviation (plus or minus 9) to the average cluster. There were 9 industry clusters identified as top clusters. 38 were classified as average clusters, while 13 clusters were in the bottom. The top nine industry clusters are as follows and discussed in depth below:

### *Insurance Services*

The Insurance Services was the Region's highest scoring cluster with a score of 85. This cluster had a GRP of nearly 1.5 billion dollars in 2019. This cluster also historically has been strong in the region and originally had ties to the lumber industry. In 2019 this cluster had 6,402 employees and by 2025, there should be 97 less jobs. The Direct Property and Casualty Insurance Carriers subindustry produces over 1.25 billion dollars in GRP annually and provided 5,362 jobs in 2019.

### *Paper and Packaging Cluster*

The paper and packaging cluster was the second highest scoring cluster in this analysis, with a score of 82 and included eight subindustries. This cluster had a GRP of 919 million dollars in 2019 and it exported over 2.6 billion dollars in annual sales to industries and other consumers not inside the North Central Region. However, over the next five years employment in this industry is expected to drop 12 percent, losing 630 jobs as the paper and wood manufacturing industries transition. Currently, there are 5,099 jobs in this cluster and the majority of losses will be in the Paper (except Newsprint) Mills subindustry. The expected decline of the Paper (except Newsprint) Mills subindustry will be severe, as this subindustry annually produces over 690 million dollars in GRP and provided 3,222 jobs in 2019, making it one of the top subindustries within the region, which is unsurprising given the history of lumber production and mill in this region.

### *Food Processing and Manufacturing*

The Food processing and manufacturing cluster was the third highest scoring cluster within the Region with a score of 77 and included 15 subindustries. This cluster had a GRP of 757 million in 2019. In 2019 this cluster had 5,89 employees with employment expected to increase 22 percent, adding 1,304 jobs by 2025. The Cheese Manufacturing subindustry is one of the top subindustries within the Region and produces over 350 million dollars in annual GRP and provided 2,931 jobs in 2019.

### *Electric Power Generation and Transmission*

The Electric Power Generation and Transmission cluster had a score of 66 and included two subindustries. This cluster had a GRP of 160 million in 2019 and it provided 251 jobs. The Fossil Fuel Electric Power Generation subindustry provided 240 jobs in 2019 and produced over 150 million dollars in GRP.

### *Local Education and Training*

This cluster had a score of 64 and had six subindustries, including elementary and secondary schools, other technical and trade schools, vocational rehabilitation services, automobile driving schools, and fine arts schools. There were 11,378 jobs in this cluster in 2019 and it was expected to add 191 jobs by 2025.

### *Production Technology and Heavy Machinery*

This cluster ranked sixth with a score of 61 and was comprised of 18 subindustries. This cluster produces a number of supporting industrial machinery, including farm machinery, construction machinery, and food product machinery manufacturing. The GRP of this cluster was 556 million dollars in 2019. There were 4,958 jobs in 2019 and the cluster is expected to add 136 jobs, a three percent increase, during the next five years.

### *Local Government Services*

This cluster ranked seventh with a score of 61, and had one subindustry; Local Government, Excluding Education and Hospitals. This cluster had a GRP of over 812 million dollars and provided 11,727 jobs in 2019. This cluster is expected to lose 179 jobs over the next five years.

### *Vulcanized and Fired Materials*

This cluster ranked eighth with a score of 58. This cluster had a GRP of over 78 million dollars and provided 412 jobs in 2019. This cluster is expected to grow by 9 percent, adding 31 jobs within the region by 2029.

### *State Government Services*

This cluster scored 58 and had a GRP of 183 million dollars. This cluster employed 1,789 workers and is expected to grow by 33 percent, adding 99 jobs by 2025.

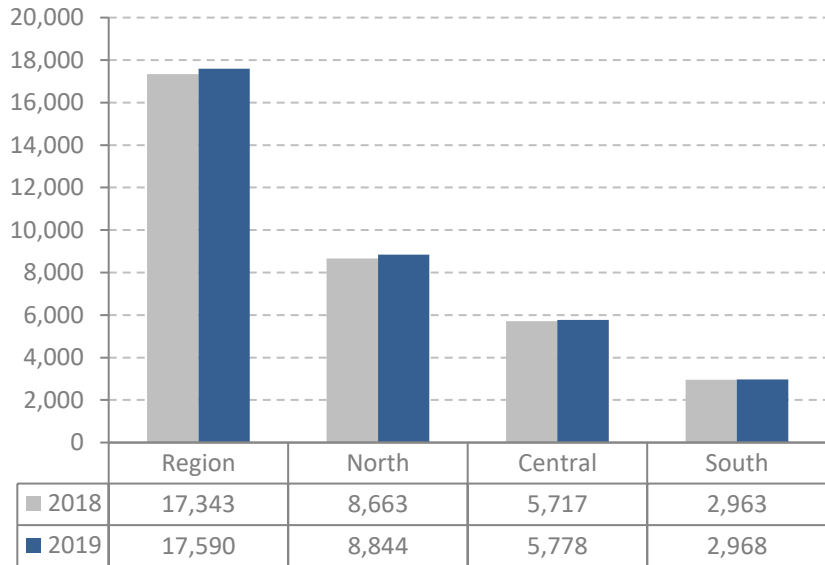
### **Tourism**

Tourism has a large impact on the Regional economy with \$1.39 billion in direct visitor spending in 2019, up from 1.36 billion in 2018. The Region had a 2.1 percent growth in tourism expenditures while the state had a 2.6 percent increase in direct visitor spending. Marathon County continues to have the highest visitor spending in the Region (\$258 million) and Forest County has the least amount of visitor spending (\$14 million). Marathon County saw the greatest growth in visitor spending in the past year at 5.5 percent followed by Vilas (3.7%) and Wood (3.7%) Counties. Overall, nine of the region's ten counties saw an increase in visitor spending over the past year, with only Adams County experiencing a decrease in visitor spending. Roughly 44 percent of visitor spending occurs in the Central sub-region, nearly 36 percent occurs in the North sub-region and about 21 percent takes place in the South sub-region. The Central sub-region had the most workers in the tourism industry in 2019 with 8,844 workers. The Central sub-region saw the greatest growth

in visitor spending and was the only region to outperform the state’s one-year growth in visitor spending. Overall, the Region was below the State’s growth in both visitor spending and employment.

**Figure 2-5** displays tourism employment within the Region and the North, Central and South sub-regions. Overall, the tourism industry added 247 jobs between 2018 and 2019 within the Region. Each sub-region added tourism jobs during this time, with the North sub-region adding 181 tourism jobs, the Central sub-region adding 61 tourism jobs, and the South sub-region adding 5 tourism jobs during this time.

**Figure 2-5: Tourism Employment**



According to the US Travel Association for every \$1 million in traveler spending, eight jobs were created in Wisconsin in 2019. This means that Regional tourism expenditures of \$1.39 billion in 2019 helped create 11,093 jobs in North Central Wisconsin. Although tourism related projects are not typically EDA projects this sector needs to be identified in the CEDS for other sources of funding. The Region’s tourism expenditures can be attributed to visits related to natural beauty, lakes, recreation vehicles, and hunting among a host of other things. Protection of the Region’s natural resources will help ensure the ability to attract and promote tourism throughout the Region.

**Entrepreneurship**

Entrepreneurship plays an important part in the economy. Research focused on Wisconsin has demonstrated that just 29% of non-farm businesses have payroll employees, while 71% are nonemployers, sole proprietorships, or partnerships with no payroll employees. Since 2000, the number of nonemployer businesses has grown by 25% while the number of payroll businesses has declined slightly. New business start-ups create the largest share of jobs compared with businesses of any other age group, accounting for over 25% of gross job creation. 62.3% of new start-ups survive to three years of operation and 51.6% survive to five years, higher than the U.S. average. Without new firm job creation, Wisconsin would be experiencing significant job losses.

Entrepreneurship is an important part of the regional economy. Companies can generally be started by new entrepreneurs coming out of unemployment, or by those coming out of wage and salary work, school, or other labor force statuses. The share of those starting businesses out of unemployment due to necessity is higher during recession periods.

The demographics of entrepreneurs have changed over the past twenty years. The number of female entrepreneurs has decreased by 3.1 percentage points. A much higher proportion of entrepreneurs in 2015 are Latino, while the proportion entrepreneurs that are Black, Asian, or other races other than white have grown slightly as well. Immigrant entrepreneurs are also increasing relative to native born entrepreneurs; nearly 28 percent of all new entrepreneurs were immigrants in 2015, compared to 13.3 percent in 1996.

### **Future Employment Projections**

Using projections created by Economic Modeling Specialists International (EMSI), the North Central Wisconsin region is expected to add 6,136 jobs over the next decade, representing an increase of 2.7 percent. **Table 2** shows employment projections for all two-digit NAICS codes. These projections use past trends and anticipated demographic and economic changes to estimate the change in employment by industry into the future. Unanticipated events affect the accuracy of projections. Health Care and Social Assistance is projected to grow by the most jobs, approximately 1,910, or six percent. The Administrative and Support and Waste Management and Remediation Services industry is also expected add over 1,000 jobs during this time, with an estimated increase of 1,137 jobs, representing a 17 percent growth rate. The Manufacturing industry is expected to remain as the region's top employment industry, providing over 38,000 jobs in 2030. The Utilities industry is expected to grow the fastest, at a 20 percent growth rate, adding an estimated 128 jobs during this time. The following four industries within the region are estimated to lose jobs in the next decade: Government (-706 jobs), Retail Trade (-569 jobs), Crop and Animal Production (-356 jobs), and Other Services (-48 jobs).



**Table 2: Employment Projections by Industry, North Central Wisconsin**

NAICS Code	Industry	2020 Jobs	2030 Jobs	2020-30 Change	2020-30 % Change
11	Crop and Animal Production	8,759	8,403	-356	-4.1%
21	Mining, Quarrying, and Oil and Gas Extraction	201	235	34	16.9%
22	Utilities	634	762	128	20.2%
23	Construction	10,916	11,670	754	6.9%
31	Manufacturing	37,944	38,576	632	1.7%
42	Wholesale Trade	7,233	7,521	288	4.0%
44	Retail Trade	24,141	23,572	-569	-2.4%
48	Transportation and Warehousing	11,589	12,108	519	4.5%
51	Information	2,548	2,628	80	3.1%
52	Finance and Insurance	13,122	13,662	540	4.1%
53	Real Estate and Rental and Leasing	1,751	1,877	126	7.2%
54	Professional, Scientific, and Technical Services	5,651	6,257	606	10.7%
55	Management of Companies and Enterprises	3,000	3,143	143	4.8%
56	Administrative and Support and Waste Management and Remediation Services	6,777	7,914	1,137	16.8%
61	Educational Services	1,390	1,482	92	6.6%
62	Health Care and Social Assistance	30,617	32,527	1,910	6.2%
71	Arts, Entertainment, and Recreation	3,051	3,585	534	17.5%
72	Accommodation and Food Services	17,819	18,111	292	1.6%
81	Other Services (except Public Administration)	9,784	9,736	-48	-0.5%
90	Government	30,421	29,715	-706	-2.3%
	Total	227,348	233,484	6,136	2.7%

Source: EMSI Q4 2020

### **Chapter 3: Transportation & Utilities**

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 of 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.

#### **Transportation**

##### **Road Network**

The Regional surface transportation network is comprised of federal, state, county and local roadways. The inventory covers over 18,500 miles of road, including 445 miles of Interstate and U.S. highways, 1,211 miles of state highways, 2,843 miles of county highways and 13,036 miles of local streets and roads. There is also nearly 1,000 miles of other miscellaneous roads, which are forest roads, fire lanes, and other roads not used for general travel purposes. Where jurisdictions overlap, the mileage is counted toward the higher class to avoid overstating the total miles of pavement within the system. See Map 3.

##### ***Interstate and Federal Highways:***

The Region is served by Interstates 39 and 90/94 and several U.S. Highways (USH): 51, 45, 12, 10 and 8. These serve as principal arterial roads with the exception of USH 12 that parallels I90/94 across the extreme southwestern corner of the Region through Juneau County and the City of Mauston. Due to its proximity to I90/94, USH 12 serves as a two-lane minor arterial and alternate route for the interstate.

Other major East-West connections include USH 10 through Portage and Wood Counties, which connects Stevens Point and Marshfield, and USH 8 through Forest, Oneida and Lincoln Counties, connecting the City of Rhinelander and other Northwoods communities to the Twin Cities. Currently, USH 8 is a two-lane facility with a four-lane bypass at Rhinelander, and USH 10 has four-lane from the Fox Cities to Marshfield.

Major North-South routes include USH 51 / I39 and USH 45. USH 51/I39 is the major north-south artery connecting the Northwoods, Wausau, Stevens Point and the rest of the Region with I90/94 and Madison, Milwaukee and Chicago. North of Tomahawk, USH 51 is two-lane through Oneida County, expands to four at Minocqua and back to two through western Vilas County. WisDOT has long-term plans to expand USH 51 to four-lanes to Minocqua. USH 45 parallels USH 51 with two-lanes flowing through Antigo and Langlade County, eastern Oneida County, and Eagle River and Vilas County.

All the interstate and U.S. highways within the Region are part of the Corridors 2020 system with the exception of USH 12 and a few remote stretches of USHs 45 and 10. Interstate 90/94 and I39 / USH 51 are backbone routes except that USH 51 north of USH 8 is designated as a connecting route. USH 10 is a backbone route east of I39 / USH 51 and a connecting route west of I39 / USH 51 to STH 13. West of STH 13 and Marshfield, USH 10 is not part of the Corridors 2020 system. The other U.S. highways including USHs 45 and 8 are designated as connecting routes except for USH 45 north of Eagle River. See Map 3.

### ***State Highway System:***

The Region is also served by a number of state trunk highways (STH). These are primarily two-lane routes with some four-lane urban sections that serve as minor arterials. Two significant exceptions include STHs 29 and 54. STH 29 is a major east-west connection for the Region and is a Corridors 2020 backbone route, traversing Marathon County and intersecting with I39/USH 51 at Wausau. STH 29 is now entirely four-lane and serves as a principal arterial. The major section of STH 54 is a four-lane connecting Wisconsin Rapids to Interstate 39 and Stevens Point.

Major east-west connections include STH 70 across northern Forest and Oneida Counties and southern Vilas County through Eagle River; STH 64 through Langlade and Lincoln Counties including the Cities of Antigo and Merrill; and STHs 21 and 82 across Adams and Juneau Counties.

Major north-south routes include STHs 13, 34, 55 and 80. Splitting the difference between USH 51 and I53, STH 13 runs between I90/94, at Wisconsin Dells just below the southern boundary of the Region, and places in North Central Wisconsin without good interstate access. The Cities of Wisconsin Rapids and Marshfield are served by STH 13. North of USH 10, STH 13 is a Corridors 2020 connecting route. Another Corridors 2020 connecting route is STH 34 between USH 10 and Wisconsin Rapids, which is being renumbered as HWY 13. The remainder of STH 34 runs between USH 10 and I39 at Knowlton. STH 80 runs through Juneau and Wood Counties (from STH 13). STH 55 carries traffic through Langlade County, Forest County and the City of Crandon.

The Region's highways are a significant component of freight flow supporting the Region's economy. The principal truck routes within the Region are primarily U.S. and state highways linking the Region's main economic centers with the rest of the state and the nation. Local truck routes often branch out from these major corridors to link local industry with the main truck routes as well as for the distribution of commodities within the local area. Mapping these local routes is beyond the scope of this study, and local issues such as safety, weight restriction and noise impacts play significant roles in the designation of local truck routes. See Map 3.

### ***County and Local Roads:***

An extensive network of county trunk highways (CTH) connects the Region's rural areas. These are classified as collector roads, and they serve as major traffic collectors from rural land uses and distribute the traffic to the arterial system. County trunk highways serve an important role in linking the Region's agricultural and forestry resources to the Region's cities and major highways. In addition, local roads, including municipal streets and town roads, provide access to local land uses like residential, commercial/industrial, and recreational areas.

### **Transit**

Public transit within the Region is comprised of fixed-route urban bus systems, demand response bus systems and shared-ride taxi services. The cities of Stevens Point and Wausau operate fixed-route bus systems including a paratransit component. The City of Merrill operates a demand-response bus system. Rural transit systems are operated by Lac du Flambeau, Menominee, and Northwoods Transit. The Village of Plover and the cities of Marshfield, Mauston, Rhinelander and Wisconsin Rapids all subsidize shared-ride taxi services. These taxi services also make accommodations for disabled riders. In addition to regular public transit, specialized transit services for the elderly and disabled are provided by each county in the Region. Other specialized transportation operations providing service throughout the area, based at medical and private care facilities, as well as social service agencies that provide various services for targeted populations.

Intercity bus service is available in parts of the region, including Stevens Point, Wausau, and Wisconsin Rapids. Service is provided by Jefferson and Lamers Bus Lines. Connections can be made to Green Bay, Chicago, and Minneapolis, and others points nationwide.

### **Airports**

Airports are critical to economic development. Within the region there are 19 public use airports, including two commercial airports. Central Wisconsin Airport is in the center of the region in Mosinee and the Rhinelander - Oneida County Airport is in the northern part of the region. These two airports are critical for the continued growth of the Region. Combined, these airports have over 43,000 aviation operations annually. See Map 3.

### **Railroads**

The rail system within the Region is made up of four rail providers, these are: Canadian National, Canadian Pacific, Tomahawk Railway, and Union Pacific. See Map 3.

Canadian National (CN) is the primary railroad serving the Region, reaching eight of the 10 counties. CN operates track mileage by county as follows: Forest 39 miles, Juneau 29 miles, Lincoln 40 miles, Marathon 70 miles, Oneida 47 miles, Portage 55 miles and Wood 62 miles. CN recently announced they are taking steps to find another party interested in purchasing segments of their non-core network in Wisconsin and northern Michigan. In total, approximately 628 miles over 15 track segments in both states could be impacted.

Canadian Pacific Railway (CPR) parallels Interstate 90/94 across the southwest corner of the Region with about 36 miles of track in Juneau County. This railroad connects with Canadian National at New Lisbon. The track in Juneau County was obtained by Canadian Pacific when it acquired the Soo Line Railroad in 1992. AMTRAK utilizes this track through Juneau County, however, there are no passenger stops located within the Region. The nearest AMTRAK stations are located in Portage, Tomah and Wisconsin Dells.

The Tomahawk Railway is perhaps one of the shortest railroads in the country. Formerly part of the Marinette, Tomahawk, and Western (MT & W) Railroad, the remaining 14 mile rail line services the paper mill and hauls products to a distribution center in the City of Tomahawk, where it is off-loaded for warehousing and transfer to trucks. The Louisiana-Pacific plant is also served by this line.

The Union Pacific Railroad (UP) crosses Adams and Juneau Counties with a connection to the Canadian National at Necedah. Union Pacific has about 29 miles of track in Adams County and about 19 in Juneau. Union Pacific tracks cross the State of Wisconsin from Superior and the Twin Cities to Milwaukee and south to Chicago.

#### ***Northwoods Rail Commission:***

The need for access to reliable rail service has been identified by local leaders and businesses in parts of our Region. The decline of rail service in northern Wisconsin has had a negative impact on manufacturers and loggers in the Region. North Central Wisconsin Regional Planning Commission assisted local leaders throughout northern Wisconsin, and they formed the Northwoods Rail Commission in 2012. The commission consists of several counties in both Wisconsin and Michigan. The mission of the Northwoods Rail Commission is to sustain and enhance safe, reliable, and efficient rail service critical to the businesses, communities, and economies in northern Wisconsin

### **Utilities**

#### ***Water & Wastewater Facilities***

Water and wastewater are among the most basic and fundamental municipal services. There are 59 municipal water systems in the Region, including ten systems that did not exist in 1978. Just over half of these systems are in the more urbanized area of the central sub-Region. Ten systems are in Juneau County, and 16 are in the five northern counties. See Map 4.

Currently there are 70 municipal wastewater treatment systems in the Region. This is an increase of 12 since 1978. Over half of these systems (36) are in the three central counties. It would be expected that a high percentage of these facilities would be in the most urbanized areas.

## ***Energy Facilities***

The energy system within North Central Wisconsin includes the Weston power plant and several hydroelectric dams. Power is distributed via a system of high voltage power lines. The Weston Power Plant site includes four separate plants that generate 525-megawatts of electricity for WPS. There is also a biomass fueled cogeneration power plant in Rothschild, collocated with a paper mill and was built to create 50-megawatts of electricity. Along the Wisconsin River there are 15 hydroelectric dams that produce electricity. A system of high voltage lines then moves the electricity from the source out to customers throughout the Region. The high voltage power lines generally follow major roads throughout the Region and connect areas with a higher concentration of population. In addition, power is moved in and out of the Region on the national power grid. See Map 4.

Natural gas is another important energy source for both business and residential needs. Within the region the primary natural gas pipeline, operated by ANR, is known as the Tomahawk Lateral. This facility consists of two 8-inch pipes running from Stevens Point north. The line is connected from the Fox Cities area and runs through the Region to Goodman and into Michigan. According to energy providers, the line is at capacity. Communication with the pipeline operators and planners is critical showing future demand for natural gas. Facility expansion to increase capacity is important to the Region. See Map 4.

## ***Telecommunications***

Telecommunications infrastructure is critical in the new global economy. Generally, cell service has improved in the region, but the major concern is availability and reliability of broadband service. The ability to connect to the internet for both business and personal needs is an issue throughout the region and in the rural areas. In addition to economic impacts, increased levels to broadband will improve access to vital basic services such as health care, government, and financial services. Service coverage in the Region mainly follows the larger population patterns, and particularly in the case of wireless phone service, mirrors the pattern of major highways. See Map 4.

Accessibility to broadband will help create job opportunities in rural area through means such as telecommuting and will increase rates of entrepreneurial business formation in rural areas. Tourism and related industries have a considerable impact on the business makeup of the Region and these businesses would see an increase in business due those travelers who would extend their stay because they can conduct their business from anyplace.

Much of the investment in infrastructure has been in fiber optics to bring broadband access to consumers, but what has been missing from the system is a method to bring direct access to this new network of high-volume lines directly into the home or business of the final user: the so-called “last mile”. DSL has provided a partial solution to this problem, and wireless offers the hope of

bridging this gap, but at this point this last mile poses an obstacle to full broadband access for many consumers, especially in rural areas in our Region.

The development of broadband access in Wisconsin has been aided by a statewide initiative, sponsored by the Public Service Commission of Wisconsin (PSCW), to promote the availability and sustainable adoption of broadband internet access. The effort provides grant funding to promote both the availability and reliability of high-speed Internet to improve economic opportunity and quality of life. The initiative is funded through a federal grant, as well as in state matching funds and in-kind services. Broadband has become a major issue during the recent pandemic. Not only for business needs, but for education and telemedicine as well.

### **Business & Industrial Parks**

Business and/or industrial parks are important assets to both the local community and the Region. There are 56 identified business and/or industrial parks within the Region. The parks are essentially an area of land that are “ready-to-build” industrial/business sites. All necessary infrastructure improvements are in place to allow a business to construct and operate with minimal difficulty. Table 3 provides a summary of each business and industrial park in the Region, according to size, services, and acres available in these parks. See Map 5.

Every county in the Region has at least one, while there are 13 in Marathon County. The majority are located in the central and south sub-Regions. In all, these parks include over 7,500 acres of business and industrial land, of which 2,100 acres are open and available with infrastructure. There are an additional 600 acres that still do not have infrastructure in place.

Most of the business and industrial parks listed have a full range of utility services (water, sewer, gas, and electric) and several have rail access.

**Table 3: Business and Industrial Parks**

County	Park Name	Community	Total Acres	Buildable	Infrastructure	Available	Water	Sewer	Gas	Electric	Rail	Highway Access
Adams	City of Adams Industrial Park	Adams	38	33	12	12	Y	Y	Y	Y	Y	HWY 13
	City of Adams South Industrial Park	Adams	40	28	0	28	Y	Y	Y	Y	N	HWY 13
	South Industrial Park	Jackson	90	90	35	75	N	N	Y	Y	N	HWY 13
	North Industrial Park	Preston	35	35	5	5	N	N	Y	Y	N	HWY 13 & 21
	Town of Rome Business Park	Town of Rome	240	220	100	140	Y	N	Y	Y	N	HWY13
Total			443	406	152	260						
Forest	City of Crandon Industrial Park	Crandon	22	22	14	14	Y	Y	Y	N	Y	HWY 8, 32 & 55
	Laona Industrial Park	Laona										
Total			22	22	14	14						
Juneau	Camp Douglas Industrial Park	Camp Douglas	10	8	5	7	Y	Y	Y	N	Y	HWY 12, 16 & I-90/94
	Elroy Industrial Park	Elroy	15	15	0	0	Y	Y	Y	Y	N	HWY 80 & 82
	Lyndon Station Industrial Park	Lyndon Station	60	55	38	38	N	Y	Y	N	Y	HWY 16 & 12, I90/94
	Mauston Business Park	Mauston	230	210	123	123	Y	Y	Y	Y	N	Hwy 82, I90/94
	Mauston Industrial Park	Mauston	390	350	17	136	Y	Y	Y	N	Y	HWY 12 & 16; I90/94
	Necedah Industrial Park	Necedah	177	177	146	146	Y	Y	Y	N	Y	HWY 80, 21 & I-90
	New Lisbon Business Park	New Lisbon	30	24	6	6	Y	Y	Y	Y	N	Hwy 12/16, I90/94
	New Lisbon Industrial Park	New Lisbon	109	109	73	73	Y	Y	Y	N	Y	Hwy 80, I90/94
Total			1,021	948	408	529						
Langlade	City of Antigo Industrial Park	Antigo	620	620	130	189	Y	Y	Y	N	N	HWY 45, 52 & 64
	Elcho Industrial Park	Elcho	52	48	0	22	Y	Y	Y	Y	N	HWY 45
	White Lake Industrial Park	White Lake	13	13	3	3	Y	Y	Y	Y	N	HWY 64 & Cty M
Total			685	681	133	214						
Lincoln	Merrill Airport Industrial Park	Merrill	90	90	50	50	Y	Y	Y	Y	N	HWY 107
	Town of Merrill Business Park	Merrill	301	301		301	Y	Y	Y	Y	N	HWY 107
	Tomahawk Industrial Park North	Tomahawk	60	60	0	0	Y	Y	Y	Y	N	Hwy 51
	Tomahawk Industrial Park South	Tomahawk	20	20	0	0	Y	Y	Y	Y	N	HWY 51
Total			471	471	50	351						
Marathon	City of Abbotsford Business Park	Abbotsford	51	51	15	15	Y	Y	Y	N	N	HWY 29 & 13
	Village of Athens Industrial Park	Athens	110	105	55	90	Y	Y	Y	N	N	HWY 97
	Colby Business Park	Colby	31	31	17	17	Y	Y	Y	Y	N	HWY 13
	Village of Marathon Business Park	Marathon	80	80	65	65	Y	Y	Y	N	N	Hwy 29 & 107
	Central Wisconsin Business Park	Mosinee	360	218	28	28	Y	Y	Y	Y	N	HWY 153 & I-39
	Village of Rothschild Business Park	Rothschild	160	160	10	10	Y	Y	Y	Y	N	Hwy 51
	City of Schofield Business Park	Schofield	240	240	0	0	Y	Y	Y	Y	N	HWY 29 & 51
	SPACE Business Park	Spencer	80	63	30	63	Y	Y	Y	Y	Y	Highway 13
	Spencer Industrial Park	Spencer	140	140	10	63	Y	Y	Y	Y	Y	Hwy 13
	Stratford Business Park	Stratford	118	118	26	26	Y	Y	Y	Y	N	HWY 97 & 153
	Wausau West Industrial Park	Wausau	500	400	345	345	Y	Y	Y	Y	N	HWY 29 & 51
	Weston Business Park South	Weston	78	42	42	42	Y	Y	Y	Y	N	Highway 29
	Weston Business Technology Park	Weston	258	258	27	27	Y	Y	Y	Y	Y	HWY 29
Total			2,206	1,906	670	791						
Oneida	Air Industrial Park	Rhineland	45	0	0	0	Y	Y	Y	Y	Y	Hwy 8 & 47
	HWY 8 West Industrial Park	Rhineland	41	0	0	0	Y	Y	Y	Y	N	Hwy 8
	Rhineland Industrial Park	Rhineland	80	0	0	0	Y	Y	Y	Y	N	Hwy 17
	Rhineland Industrial Park (Aviation)	Rhineland	29	29	0	0	Y	Y	Y	Y	N	HWY 8
	Three Lakes Industrial Park	Three Lakes	20	20	0	0	Y	Y	Y	N	N	HWY 32 & 45
Total			215	49	0	0						
Portage	Amherst Business Park	Amherst	40	37	37	31	Y	Y	Y	Y	Y	HWY 10
	Pines Corporate Center	Plover	112	112	86	86	Y	Y	Y	N	Y	HWY I-39 & HWY 54
	Portage County Business Park	Plover	422	422	212	212	Y	Y	Y	Y	Y	HWY I-39 & HWY 10
	Twin Towers Industrial Park	Plover	100	100	5	5	Y	Y	Y	Y	Y	HWY I-39
	Stevens Point Industrial Park	Stevens Point	300	0	0	0	Y	Y	Y	Y	Y	HWY I-39
Total			974	671	340	334						
Vilas	Eagle River Industrial Park	Eagle River	80	80	0	0	Y	Y	Y	N	N	HWY 45 & 70
	Tamarack Business Park	Eagle River	40	32	18	18	Y	Y	Y	N	N	HWY 45 & 70
	Lac du Flambeau Industrial Park	Lac du Flambeau	60	60	7	7	Y	Y	N	Y	N	HWY D & 47
	Thorofare Road Industrial Park	Lac Du Flambeau	78	78	0	78	Y	N	N	Y	N	Hwy 47
Total			258	250	25	103						
Wood	Marshfield Air Business Park	Marshfield	26	26	7	7	Y	Y	Y	Y	N	HWY 10 & 14
	Marshfield East Industrial Park	Marshfield	260	240	0	0	Y	Y	Y	N	N	HWY 10, 13 & 97
	Mill Creek Business Park	Marshfield	160	154	137	137	Y	Y	Y	N	Y	HWY 10 & 13
	Norwood Industrial Park	Marshfield	60	55	19	19	Y	Y	Y	Y	N	HWY 10
	Yellowstone Industrial Park	Marshfield	84	84	84	84	Y	Y	Y	N	Y	HWY 10
	Nekoosa Industrial Park	Nekoosa	58	43	33	43	Y	Y	Y	Y	N	Hwy 173 & 73
	Rapids East Commerce Center	Wisconsin Rapids	213	213	40	112	N	Y	Y	Y	Y	Hwy 54
	Wisconsin Rapids West Side Industrial Park	Wisconsin Rapids	538	530	31	31	Y	Y	Y	Y	Y	HWY 13 & 54
	Woodlands Business Park	Wisconsin Rapids	148	148	32	61	Y	Y	Y	Y	N	HWY 13 & 54
Total			1,547	1,493	383	494						



## **Chapter 4: Regional Integration & SWOT Review**

### **Integration with State, Regional & Local Efforts**

The NCWRPC recognizes that in addition to efforts and activities initiated by the EDD, collaboration and coordination with state, Regional, and local economic development efforts is crucial to the full implementation of the CEDS.

### **Wisconsin**

#### ***Be Bold Wisconsin***

In 2010, Be Bold Wisconsin: The Wisconsin Competitiveness Study was completed. The study was designed to provide a non-partisan framework to transform Wisconsin's economic development strategy, for use by "decision makers in government, academia, and industry". The study was funded by the Wisconsin Economic Development Association (WEDA), the Wisconsin Counties Association (WCA), and Competitive Wisconsin, Inc.

Although the study was targeted at a statewide strategy, it does recognize the importance for the statewide plan to target key industries, without "overlooking the fact that particular industries may be critical to a Regional economy without being an identified driver of the state's economy"; it went on to state that "Regional-level clusters should be interwoven into the overall Wisconsin economy development strategy".

#### ***Wisconsin Economic Development Corporation (WEDC) Strategic Plan***

The Wisconsin Economic Development Corporation, formerly the state Department of Commerce, is charged with leading Wisconsin's economic development efforts. WEDC has recently adopted a strategic plan. NCWRPC staff has and will continue to collaborate with WEDC to ensure that the North Central Wisconsin CEDS aligns with the WEDC efforts.

### **Regional**

#### ***Economic Development District Designation, 1980***

Formal economic development planning in the Region began in 1978 when the NCWRPC produced the first Overall Economic Development Program (OEDP). The OEDP was required as part of the process to gain designation for the Region as an Economic Development District (EDD) from the U. S. Department of Commerce, Economic Development Administration. In March of 1980 the designation was granted and it maintained to this day. The OEDP was renamed the Comprehensive Economic Development Strategy (CEDS) in 2000.

#### ***Regional Livability Plan, 2015***

The North Central Wisconsin Regional Planning Commission adopted the Regional Livability Plan in 2015. The Regional Livability Plan identifies ways to address the region's opportunities and weaknesses to become more livable for all residents.

The plan addresses four areas, including economic development issues of available labor force and employment, living wage, and broadband. There were five goals for economic development in the region: 1) Ensure the future availability of a skilled and flexible workforce; 2) Support and develop a diverse economic base ensuring economic growth and resiliency; 3) Support infrastructure needed for economic development; and 4) Develop tourism and the knowledge-based economy into leading economic sectors.

### **Regional SWOT Review**

The Region has several economic strengths and some areas of weaknesses for attracting companies and or creating new firms. Through the CEDS process the Regional economic strengths, weaknesses, opportunities, and threats to the Region were identified. Some of these have been identified in earlier versions of the CEDS as well.

<p><b><u>Strengths</u></b></p> <ul style="list-style-type: none"> <li>• Strong Manufacturing Base</li> <li>• Access to quality Interstates</li> <li>• Access to Regional airport</li> <li>• Regional economic development effort and communication</li> <li>• Innovative workforce</li> <li>• Tourism</li> <li>• Knowledgeable and hardworking workforce</li> <li>• Competitive wages for businesses</li> <li>• Lower Cost of Living</li> <li>• Quality education system</li> <li>• Technical, 2-year and 4-year college programs</li> <li>• Access to natural resources</li> <li>• Quality freshwater resources</li> <li>• Quality of life/place</li> <li>• Quality healthcare options</li> <li>• Wealth of recreational activities</li> <li>• Low state taxes for businesses</li> <li>• Access to regional and municipal airports</li> </ul>	<p><b><u>Opportunities</u></b></p> <ul style="list-style-type: none"> <li>• Industry specific 2-year training programs</li> <li>• Innovative workforce</li> <li>• Creative new uses for existing infrastructure i.e., idle paper mills</li> <li>• Emerging healthcare sector</li> <li>• Better use of the Regional airport</li> <li>• Access to Federal Lands timber</li> <li>• Specialized manufacturing clusters</li> <li>• Access to freshwater</li> <li>• Natural resources and environment</li> <li>• Entrepreneurial support</li> <li>• Increasing number of incubators and seed accelerators</li> <li>• Increase Regional collaboration</li> <li>• Capitalization of educated &amp; active retiree population</li> <li>• Strong work ethic</li> <li>• Municipal airports</li> <li>• Amtrak access and stops</li> </ul>
<p><b><u>Weaknesses</u></b></p> <ul style="list-style-type: none"> <li>• Limited broadband</li> <li>• Workforce availability</li> <li>• Roads limits for heavy transportation</li> <li>• Lack of skilled labor for specialties</li> <li>• Lack of knowledge of manufacturing careers</li> <li>• Distance to major markets</li> <li>• Limited freight rail access in North</li> <li>• High dependence on traditional manufacturing industries</li> <li>• Waste disposal/ solid waste issues</li> <li>• Declining young population</li> <li>• Aquatic/ natural and terrestrial invasive species</li> <li>• Lack of national forest access for timber cutting</li> <li>• Lower wages for workers</li> <li>• Availability of diverse affordable housing options</li> <li>• Lack of public transit</li> </ul>	<p><b><u>Threats</u></b></p> <ul style="list-style-type: none"> <li>• Slow population growth</li> <li>• Shrinking workforce</li> <li>• Unprepared workforce</li> <li>• Low wages result in low quality workers</li> <li>• Aging population</li> <li>• Manufacturing dependency</li> <li>• Paper manufacturing dependency</li> <li>• Lack of diversity in industries</li> <li>• Shortage of older woods supply</li> <li>• Shrinking manufacturing workforce</li> <li>• Aquatic and terrestrial invasive species</li> <li>• Declining water quality</li> <li>• Lack of creative industry clusters</li> <li>• Decreasing younger population</li> <li>• Aging/ retiring workforce</li> <li>• Growing healthcare costs</li> <li>• Brain drain, threat of people not moving back after receiving education</li> <li>• Funding for entrepreneurial, small, and midsize businesses</li> <li>• Future natural gas availability</li> </ul>

## **Chapter 5: Economic Development Resources**

The following is a brief listing of federal, state, Regional and local resources, and programs to assist economic development efforts in the Region. This list is only a summary of some of the programs available and provides the most current program information. The reader should seek current information on any of the programs listed.

### **Federal Programs:**

#### ***Economic Development Administration (EDA):***

The EDA is part of the U.S. Department of Commerce focusing on providing financial assistance to meet the economic development needs of distressed communities. EDA works with states, Regions, and communities to assist in the creation of wealth and minimize poverty using capacity-building and planning techniques as well as research grants and strategic initiatives. All EDA investments must be targeted in areas that demonstrate need or economic distress and, out of those qualifying communities; assistance is directed toward those projects that will generate long-term economic growth.

EDA's programs include:

1. Public Works Program – empowers distressed communities to revitalize, expand, or upgrade their physical infrastructure to attract new industry, encourage business expansion, diversify local economies, and generate or retain long-term, private sector jobs and investment. Examples of past investments include water and sewer facilities, industrial access roads, rail spurs, port improvements, skill-training facilities, technology related infrastructure, as well as the demolition, renovation, and construction of publicly owned facilities.
2. Economic Adjustment Program – assists state and local interests in the design and implementation of strategies to adjust or bring about a change in economy due to industrial or corporate restructuring, natural disaster, reduction in defense expenditures, depletion of natural resources, or new federal laws or requirements.
3. Technical Assistance Program – often supports feasibility studies on potential economic development projects to help fill the knowledge and information gaps that may prevent local leaders in distressed areas from making optimal decisions on economic development issues. Often these studies involve evaluations of proposals for industrial parks or business incubators. Sometimes, however, these funds may be used to sponsor conferences, develop revitalization plans, or to establish Geographic Information Systems for local planning and development purposes.

***U.S. Small Business Administration (SBA):***

The SBA provides financial, technical, and management assistance to help citizens start, run, and grow their businesses. The SBA has many programs focused primarily on making business loans and providing counseling and training programs for small businesses.

SBA's Certified Development Company (504) Loan Program provides growing businesses with long-term, fixed-rate financing for major fixed assets, such as land and buildings. 504 loans can be used to fund land purchases and improvements, grading, street improvements, utilities, parking lots and landscaping, construction of new facilities, or modernization, renovation, or conversion of existing facilities. A Certified Development Company (CDC) is a nonprofit corporation set up to contribute to the economic development of its community. The Region utilizes the statewide Wisconsin Business Development Finance Corporation to access this program.

***U.S. Department of Agriculture, Rural Development:***

USDA Rural Development provides a wide range of programs to assist in community and economic development in farm and rural areas across the US. While the USDA's housing, empowerment, and utility programs are beneficial to the stability of communities, it is their business and cooperative programs that are the most directly applied to economic development.

1. Business and Industry (B&I) Guaranteed Loan Program - helps create jobs and stimulates rural economies by providing financial backing for rural businesses. This program provides guarantees up to 90 percent of a loan made by a commercial lender. Loan proceeds may be used for working capital, machinery and equipment, buildings and real estate, and certain types of debt refinancing. The primary purpose is to create and maintain employment and improve the economic climate in rural communities.

2. Intermediary Relending Program (IRP) – finances business facilities and community development projects in rural areas. This is achieved through loans made by the Rural Business-Cooperative Service (RBS) to intermediaries. Intermediaries re-lend funds to ultimate recipients for business facilities or community development. Intermediaries establish revolving loan funds so collections from loans made to ultimate recipients in excess of necessary operating expenses and debt payments will be used for more loans to ultimate recipients.

**State Programs**

***Department of Administration:***

The Division of Housing, within the Department of Administration, offers a broad range of financial and technical assistance to improve and expand housing, increase affordable housing opportunities, and provide services to people without housing. The variety of federal and state programs it manages benefits persons with disabilities-, low- and moderate-income residents and homeless populations. The Division of Housing partners with local governments, homeless service

providers, developers, and housing organizations throughout the state to improve housing conditions for low to moderate income Wisconsin residents. It distributes over \$30 million annually.

Community Development Block Grant (CDBG) – Economic Development Program: Grant funds are awarded to local governments to assist businesses to create or retain jobs for individuals with low and moderate incomes. Examples of eligible projects include business loans to expand facilities or purchase equipment, specialized employee training, or business infrastructure projects.

Community Development Block Grant (CDBG) – Public Facilities: These funds help support infrastructure and facility projects for communities. Some examples of eligible projects include streets, drainage systems, water and sewer systems, sidewalks, and community centers.

Community Development Block Grant (CDBG) – Planning Program: These grant funds support community efforts to address improving community opportunities and vitality. Grants are limited to projects that, if implemented, would meet a CDBG National Objective.

Community Development Block Grant (CDBG) – Housing Funds: These grant funds help communities improve and expand the supply of affordable housing for low- and moderate-income families. Eligible activities include housing rehab, homeownership assistance, and acquisition, demolition, or site improvements for construction of affordable housing.

Community Development Block Grant (CDBG) -- Emergency Assistance (EAP) Funds: This grant fund program assists communities that are working to recover from a recent natural or manmade disaster. Eligible activities include repair of disaster-related damage to dwellings, assistance to purchase replacement dwellings, and repair and restoration of public infrastructure and facilities.

Customized Labor Training (CLT): The CLT program can provide grants to help cover a portion of the costs associated with training employees on new technologies, industrial skills or manufacturing processes. Eligibility is typically limited to those companies that are making capital investments new technologies that subsequently necessitate the training of existing or new employees.

Economic Development Tax Credits/ Job Tax Credits: Tax credits for companies remaining, expanding or relocating.

***Wisconsin Economic Development Corporation:***

The Wisconsin Economic Development Corporation is the state's primary department for the delivery of integrated services to businesses. Their purpose is to 1) foster retention of and creation of new jobs and investment opportunities in Wisconsin; 2) foster and promote economic business, export, and community development; and 3) promote the public health, safety, and welfare through effective and efficient regulations, education, and enforcement.

**Brownfield Grants:** Grants to local governments, businesses, non-profits, and individuals for developing commercial and industrial sites that have been adversely affected by environmental contamination.

**Brownfield Site Assessment Grant:** Grant funds to approved projects to assist local governments with conducting initial environment assessment and demolition activities on an eligible abandon, idle, or underutilized industrial or commercial site.

**Business Opportunity Loan Fund:** Financing options ranging from loans to loan guaranties for businesses making investments to expand in or relocate to Wisconsin.

**Workforce Training Grants:** Developed to assist businesses in workforce retention and expansion into new markets and technology, training grants provide funds to businesses planning to upgrade or improve the job-related skills of its full-time employees.

**Idle Industrial Sites Redevelopment Program:** Highly competitive program offering grants to Wisconsin communities for the implementation of redevelopment plans for large industrial sites that have been idle, abandon, or underutilized for at least five years.

**The Industrial Revenue Bond (IRB) Program:** The IRB program involves an allocation of Federal tax-exempt status on bonds that will be issued by a business to finance an expansion project. By classifying the bonds as tax exempt, the company can offer the bonds at a reduced interest rate. Although this program is heavily utilized, its use is limited to small and mid-size manufacturers with strong financial statements.

**Capacity Building Grants:** Grants to assist local and Regional economic development groups to create an advanced economic development network within the state.

**Certified Sites Program:** Consistent standards developed for Wisconsin sites consisting of at least 50 contiguous, developable acres signaling that key approvals, documentations and assessments for industrial uses are already in place.

**Capital Catalyst Program:** Grants to local organizations that contribute matching dollars to locally-managed seed fund for investments in high-growth, technology based companies.

**Qualified New Business Venture (QNBV):** Early-stage businesses developing innovative products, processes or services may be designated as QNBVs by the Wisconsin Economic Development Corporation (WEDC). This designation allows eligible angel investors and qualified venture capital funds to receive a tax credit based on their equity investment.

Technology Development Loan Program: Flexible lending program designed to assist high-tech startup and emerging growth companies in financing the development and launch of innovative products and services.

Seed Accelerator Program: Grants to local organizations that operate mentor-driven business modeling training programs to provide funds to participating start-ups.

Export Technical Assistance: Assistance to expand the sale of Wisconsin-made products outside of the United States and to help companies develop an export strategy.

Global Business Development Grants: Grant funding to support the growth and expansion of exports by Wisconsin companies.

Main Street Program: This program helps communities organize to revitalize their downtowns. The Main Street program promotes a four-pronged approach of: organization, promotion, design, and economic restructuring. State assistance includes training for community-based program managers, workshops, on-site visits, and on-going technical support.

Community Investment Grant Program: The Community Development Investment Grant Program will support redevelopment efforts by providing financial incentives for shovel-ready projects with emphasis on, but not limited to, downtown community driven efforts. Successful recipients will demonstrate significant, measurable benefits in job opportunities, property values and/or leveraged investment by local and private partners.

***Wisconsin Department of Workforce Development (DWD):***

DWD offers programs in vocational rehabilitation, employee training, childcare establishment, and adult apprenticeship programs in construction, services, and industrial/manufacturing activities, among others.

***Wisconsin Department of Natural Resources (DNR), Bureau of Remediation and Redevelopment:***

The DNR provides a comprehensive and new streamlined program that consolidates state and federal cleanups into one program (e.g., hazardous waste cleanup, underground storage tank investigation & cleanup, spill response, state-funded clean ups, and Brownfield sites). Assistance is also provided to businesses seeking to clean up and re-use existing Brownfield sites for commercial, public or green space uses. The DNR also inventories Brownfield sites through their Tracking System (BRRTS) and Geographic Information (GIS) registry. These databases connect to statewide information about contaminated sites, spills, cleanups, and other data.



***Wisconsin Housing and Economic Development Authority (WHEDA):***

WHEDA is responsible for a number of housing and economic development functions. WHEDA works with local and state economic development professionals, businesses, and lending institutions to help an individual expand or modernize a farm or business. Loan Guarantees, direct loans, New Market Tax Credits, and interest rate subsidies are utilized within a financial package to help ensure that the project has the best chance for long term success.

***Other state resources include:***

Impact Seven, Inc., is one of more recognizable statewide organizations that provide micro-loans for small business start-ups and expansions (Source: [www.impactseven.org](http://www.impactseven.org)) The Wisconsin Women's Business Initiative Corporation (WWBIC) also provides micro-loans to predominately women, people of color, and those with lower incomes (Source: [www.wwbic.com](http://www.wwbic.com)). The Wisconsin Business Development Finance Corporation provides financial assistance and resources to business and lenders throughout the state (Source: [www.wbd.org](http://www.wbd.org)).

**Regional Programs**

***North Central Wisconsin Regional Planning Commission (NCWRPC):***

The North Central Wisconsin Regional Planning Commission is a designated Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration. Under this designation, the Commission maintains a continuous process of planning assistance that supports the formulation and implementation of economic development programs designed to create or retain full-time permanent jobs and income. The NCWRPC provides services such as: economic research, marketing, financial packaging, evaluation and analysis of public infrastructure needs that support private economic development activity and works with local units of government to maintain eligibility for certain grants.

***North Central Wisconsin Development Corporation (NCWDC):***

The North Central Wisconsin Development Corporation (NCWDC) is a Regional organization created for the purpose of managing a two Regional revolving loan funds. Currently businesses in the following counties are eligible: Adams, Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas, and Wood. The NCWDC is a non-profit organization and is staffed by NCWRPC. One fund was funded by USDA - Rural Development using the Intermediary Relending Program (IRP) and the other was funded by a grant from HUD.

***Small Business Development Centers:***

The Wisconsin Small Business Development Centers (WSBDCs) The Wisconsin Small Business Development Center Network (WSBDC) includes 12 business assistance centers and three specialty service centers for small businesses and entrepreneurs. Associated with four-year campuses of the University of Wisconsin system, the WSBDC assistance centers provide free one-on-one counseling

and moderately-priced training programs designed to promote local entrepreneurship and small business growth.

***North Central Wisconsin Workforce Development Board (NCWWDB):***

North Central Wisconsin Workforce Development Board (NCWWDB) is a public/private partnership between government and business that plans, administers, and coordinates Workforce Investment Act (WIA) employment and training programs in the nine counties of Adams, Forest, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas, and Wood. This region is known as Workforce Development Area 6. The NCWWDB purpose is to provide policy, planning, oversight and funding for local workforce development programs and address workforce issues as they emerge within our region.

***Central Wisconsin Economic Development (CWED):***

County and local CDBG funded revolving loan funds from Adams, Forest, Lincoln, Marathon, Portage, Vilas and Wood Counties, and many local communities in those counties have consolidated their funds into one managed fund. Additional counties are being added to this organization with the goal of having the same boundaries as the NCWRPC. By regionalizing the funds, numerous benefits have resulted including removal of some limiting federal regulations. A board of directors was established to provide general oversight. Local loan review committees work at the local level to lend these funds.

***Centergy:***

Centergy serves a diverse five county region, with a wide range of progressive, innovative businesses and industries — most notable are advanced manufacturing, emerging sustainable and bio-based technologies, and leading health care. Centergy is a non-profit organization comprising a variety of businesses, Chambers, CVBs, organizations and individuals, working together to improve the region’s business climate and civic infrastructure. Collaboration with our partnering entities provides effective synergy.

***Grow North:***

Grow North is a volunteer private/public organization dedicated to the economic development in the five counties of northern Wisconsin. Recently Florence, Marinette, and Oconto Counties have joined the organization. The region has vast resources and recreational opportunities. Grow North is a membership driven organization whose partners recognize the importance and value of collaboration to ensure that the Grow North region remains competitive in the global economy.

**County & Local Programs:**

Nine of the ten of the counties within the Region have full-time economic development organizations. These corporations were created to assist local economic development activities throughout the Region. The nine staffed countywide development corporations are Adams County

Economic Development, Forest County Economic Development Partnership, Juneau County Economic Development Corporation, Langlade County Economic Development Corporation, Lincoln County Economic Development Corporation, Marathon County Economic Development Corporation, Oneida County Economic Development Corporation, Portage County Business Council, and Vilas County Economic Development Corporation.

In addition to those countywide organizations listed above, many individual communities have their own development groups; some are associated with chambers of commerce, while others are local development or redevelopment corporations/authorities.

## **Chapter 6: Regional Strategy**

The following goals and objectives provide the foundation for the regional strategy. A discussion of the various performance indicators that will be used to gauge progress toward the strategy are identified as well. Finally, an Action Plan is detailed for the efforts of the North Central Wisconsin Regional Planning Commission. Much of this work requires collaboration and partnerships with the various economic development organizations, state and federal agencies, local and county governments and the business community of the region for implementation to occur.

### **Goals and Objectives:**

#### **Goal 1:**

**Promote and Increase communication between Regional and county economic development, workforce development and other organizations.**

##### *Objectives:*

1. Collaborate with local, county, economic development organizations, surrounding regional planning commissions, state, and federal agencies, as well as private sector.
2. Create a unified vision of Regional growth and development needs for the Region.
3. Increase communication and collaboration at the Regional level about land use and transportation planning as it relates to economic development.
4. Coordinate economic development efforts among all entities to provide a seamless approach to maintain and diversify the Regional economy.
5. Establish and maintain long-term partnerships to promote economic development throughout the Region.

#### **Goal 2:**

**Encourage business retention and expansion to maintain and increase employment opportunities in the Region.**

##### *Objectives:*

1. Expand communication with existing businesses to identify opportunities and challenges.
2. Improve the Region's competitiveness by assessing and leveraging industry clusters.
3. Educate businesses on different grant and funding opportunities available.
4. Encourage and promote business education on exporting opportunities.

#### **Goal 3:**

**Create an innovative atmosphere to foster an entrepreneurially supportive environment.**

##### *Objectives:*

1. Diversify the Region's economy by fostering the development of emerging industry sectors.

2. Identify, create, and promote programs, activities, and policies fostering innovation and new business reducing the risk for entrepreneurs.
3. Identify and grow angel and venture capital investments.
4. Promote a culture of entrepreneurial and innovative business development.
5. Promote and encourage the development of new business incubators throughout the Region.
6. Develop the connection between the creative industries and economic development.
7. Identify and study “place-making” opportunities to improve public spaces.
8. Establish a link between educational institutions and business development.
9. Support start-up and small businesses with training, market research, financial assistance, strategic planning, and other assistance.

**Goal 4:**

**Promote and attract new business to the Region.**

*Objectives:*

1. Work with local governments, Regional partners, and the state to assist with the attraction of new businesses to the area.
2. Recruit new businesses and industries that complement existing clusters, and place special emphasis on higher wage clusters.
3. Diversify the Region’s economy fostering the development of emerging and evolving industry clusters.
4. Make prudent use of government incentives to enhance business development in the Region.
5. Consider impacts on local workforce related to attraction.

**Goal 5:**

**Encourage the reuse of existing commercial and industrial sites for more sustainable economic development.**

*Objectives:*

1. Ensure that building and development codes and plans within the Region promote and facilitate the redevelopment of existing structures and infill development.
2. Continue to assess, remediate, and redevelop brownfield sites throughout the Region, taking full advantage of federal and state funding opportunities.
3. Work to increase the number of viable businesses and institutions in the downtown districts of our communities.
4. Maintain and enhance infrastructure and public facilities throughout the Region.
5. Maximize efficiency of existing public utilities systems through redevelopment.

**Goal 6:**

**Meet the full range of private sector infrastructure needs with emphasis on transportation, utilities, and communications.**

*Objectives:*

1. Develop a reliable broadband infrastructure networks, especially in rural areas.
2. Work with WISDOT to plan for, develop and maintain the capacity of the Region's transportation system.
3. Continue to support upgrades and repair of existing roadways.
4. Expand municipal utilities to serve areas where they are needed for job growth.
5. Work with Central Wisconsin Airport and the Rhinelander /Oneida County Airport to expand cargo and passenger service in the Region.
6. Support efforts to maintain and expand freight rail in the Region.
7. Explore commuter and passenger rail service to the Region.

**Goal 7:**

**Ensure the future availability of a skilled and flexible workforce prepared to meet the needs of both existing and emerging industries and technologies.**

*Objectives:*

1. Work with North Central Wisconsin Workforce Development to provide training to workers of all ages and economic strata to ensure they are current in existing and emerging skills, knowledge, ability, and expectations.
2. Increase the number of 4-year high school completions in the Region.
3. Develop a plan to retain and attract a young workforce.
4. Increase the number of associates and 4-year degrees in the Region.
5. Develop entrepreneurial training and education at area high schools, technical colleges, and universities.
6. Work with businesses, K-12 Schools, Higher Education Schools and Workforce Development to determine and develop skill sets.
7. Enhance business-specific leadership skills in young professionals
8. Develop a training program for retiring workforce to help develop a "second career".

## **Regional Performance Indicators**

To monitor change over time, these ten indicators have been established. Much of this information is contained in the CEDS. These are listed in no order:

1. Total regional population/age by cohorts
2. Total regional employment
3. Regional employment per sector
4. Regional unemployment
5. Total regional business establishments
6. Regional Location Quotient changes
7. Broadband access and reliability (area change)
8. Regional education levels for high school, associates, and bachelor's degrees
9. Acreage available for industrial/businesses development
10. Regional Per Capita & Median Household Income

Develop a dashboard that is updated – at least annually – for the region. This may be something considered at the sub-region and county level.

**NCWRPC Action Plan**

The following section provides a summary of tasks that the NCWRPC will undertake alone or in support of members, as resources permit, to support the overall goals of the CEDS:

<b>Figure 15 NCWRPC Strategy Action Plan</b>	
<b>Goal 1: Promote and Increase communication between Regional and county economic development, workforce development and other organizations.</b>	
Task	Timeframe
Attend county economic development corporation meetings at least once a year.	Ongoing
Attend occasional regional economic group meetings.	Ongoing
Attend meetings/conferences/ webinars with various state and federal agencies and other organizations.	Ongoing
Attend EDA meetings/calls/conferences.	Ongoing
<b>Goal 2: Encourage business retention and expansion to maintain and increase employment opportunities in the Region.</b>	
Task	Timeframe
Prepare Comprehensive Economic Development Strategy and annual performance reports.	Annually
Attend, at least annually, member County Economic Development Corporation’s regular meetings to provide update on NCWRPC assistance and CEDS.	Annually
Provide Regional demographic information using EMSI and other data to complete economic analysis	Ongoing
Update County Profiles.	Occasionally
Assist the North Central Wisconsin Development Corporation and work with other existing loans funds in the area to support local business development.	Ongoing
Provide assistance to members as needed. Explore WEDC, WHEDA, DOA, EDA and other grant opportunities to complete plans/projects.	Ongoing



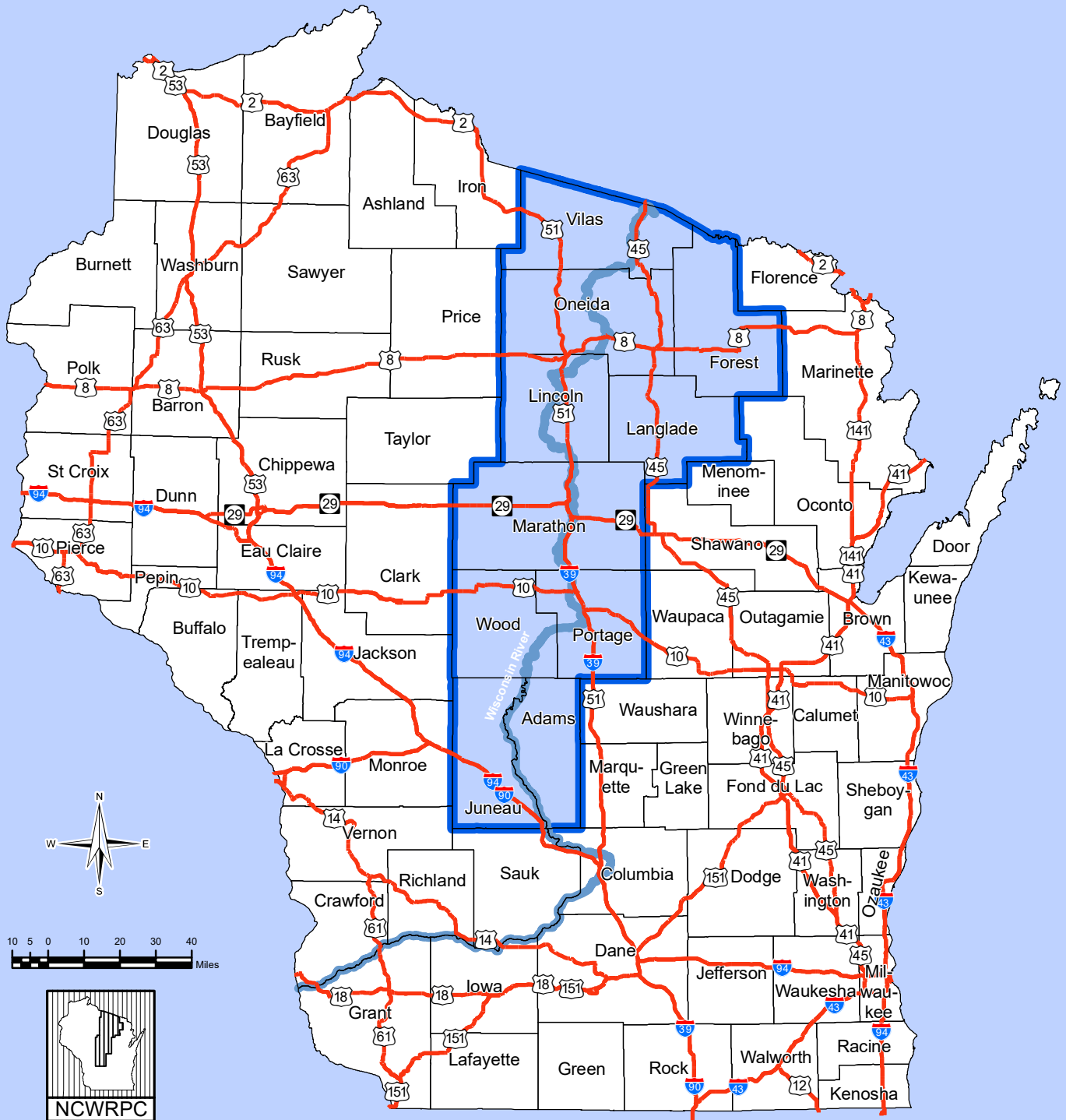
Assist local development corporation staff, county ED committees, and regional economic development groups.	Ongoing
Promote the retention and expansion of existing businesses.	Ongoing
Encourage and assist start-up of firms in the Region.	Ongoing
<b>Goal 3: Create an innovative atmosphere to foster an entrepreneurially supportive environment.</b>	
Task	Timeframe
Assist local communities prepare and update comprehensive plans and other related plans.	Ongoing
Assist preparing “downtown plans” as part of a Quality of Place effort.	Ongoing
Prepare feasibility studies for new business incubators if cost sharing is available.	Ongoing
<b>Goal 4: Promote and attract new business to the Region.</b>	
Task	Timeframe
Research and identify new business grant opportunities with DOA, WEDC, WHEDA, USDA, and EDA.	Ongoing
Maintain inventory and map of business (industrial and commercial) acreage in the Region.	Ongoing
Support communities in the recruitment of new businesses to the Region.	Ongoing
Research and identify emerging clusters in the Region and state.	Ongoing
<b>Goal 5: Encourage the reuse of existing commercial and industrial sites for more sustainable economic development.</b>	
Task	Timeframe
Assist Brownfield planning efforts to support communities.	Ongoing

Work with DNR and other regional planning commissions in the state brownfield consortium.	Ongoing
Work with organizations to get properties and sites listed on “Locate In Wisconsin” website.	Ongoing
Pursue grant opportunities from federal agencies, such as EDA, EPA and USDA.	Ongoing
<b>Goal 6: Ensure the future availability of a skilled and flexible workforce prepared to meet the needs of both existing and emerging industries and technologies.</b>	
Task	Timeframe
Support the efforts of and collaborate with the North Central Wisconsin Workforce Development Board, Technical Colleges, 2 and 4-year Colleges and Universities.	Ongoing
Provide data related to employment characteristics and needs.	Ongoing
Encourage educational institutions to develop training programs needed by the area’s businesses.	Ongoing
Encourage educational institution and job training centers to offer “second” career training options.	Ongoing
<b>Goal 7: Meet the full range of private sector infrastructure needs with emphasis on transportation, utilities, and communications.</b>	
Task	Timeframe
Maintain a listing of all business/industrial parks in Region.	Ongoing
Suitable areas with needed infrastructure should be available for industrial and commercial development in the Region.	Ongoing
Promote broadband infrastructure and other technology development and expansion in the Region.	Ongoing
Work with CWA and Oneida Airport as needed.	Ongoing
Assist efforts of the Northwood Rail Commission.	Ongoing

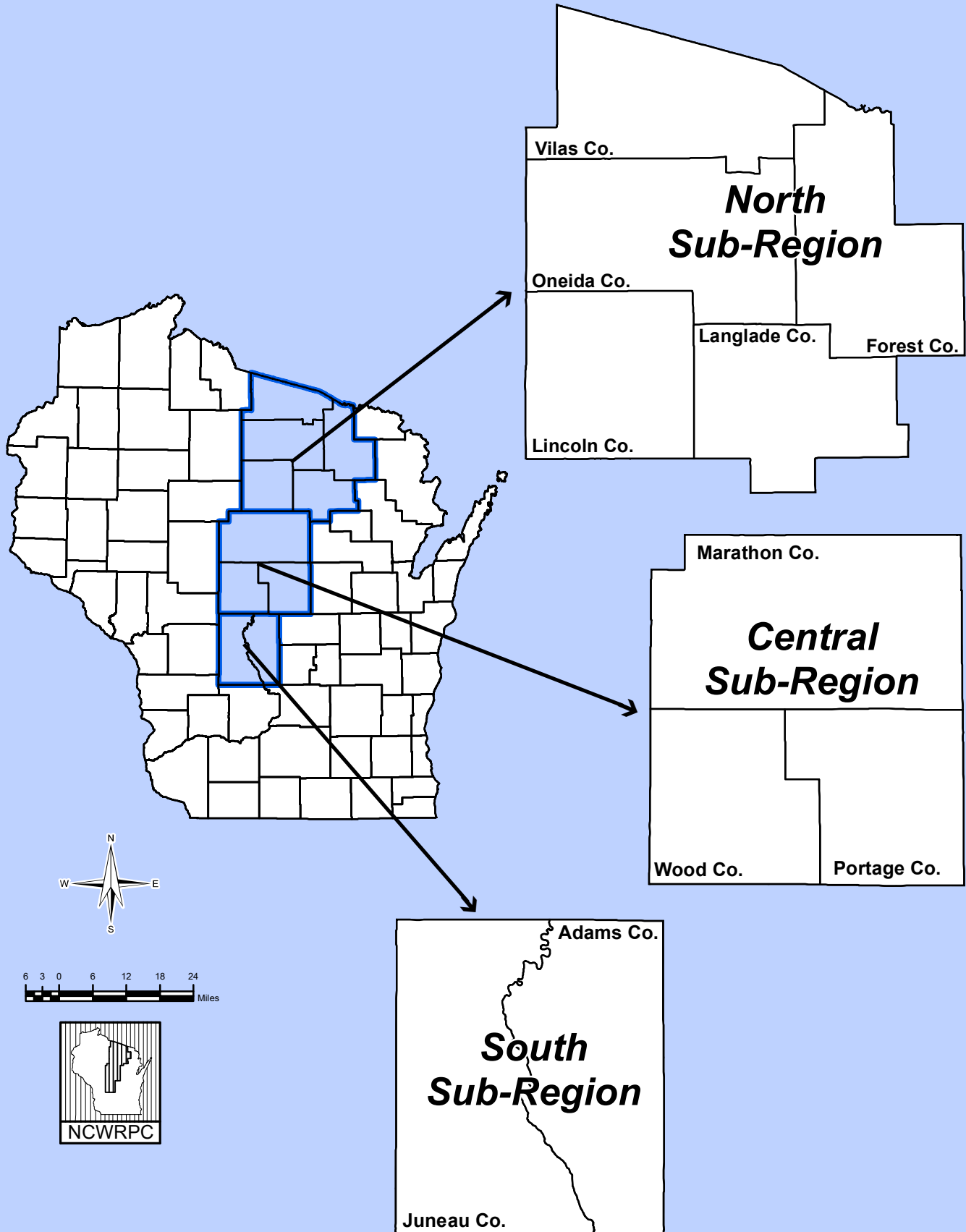
**Maps:**

**North Central Region  
North Central Sub-Regions  
Transportation  
Infrastructure & Utilities  
Business & Industrial Parks**

This page intentionally left blank.

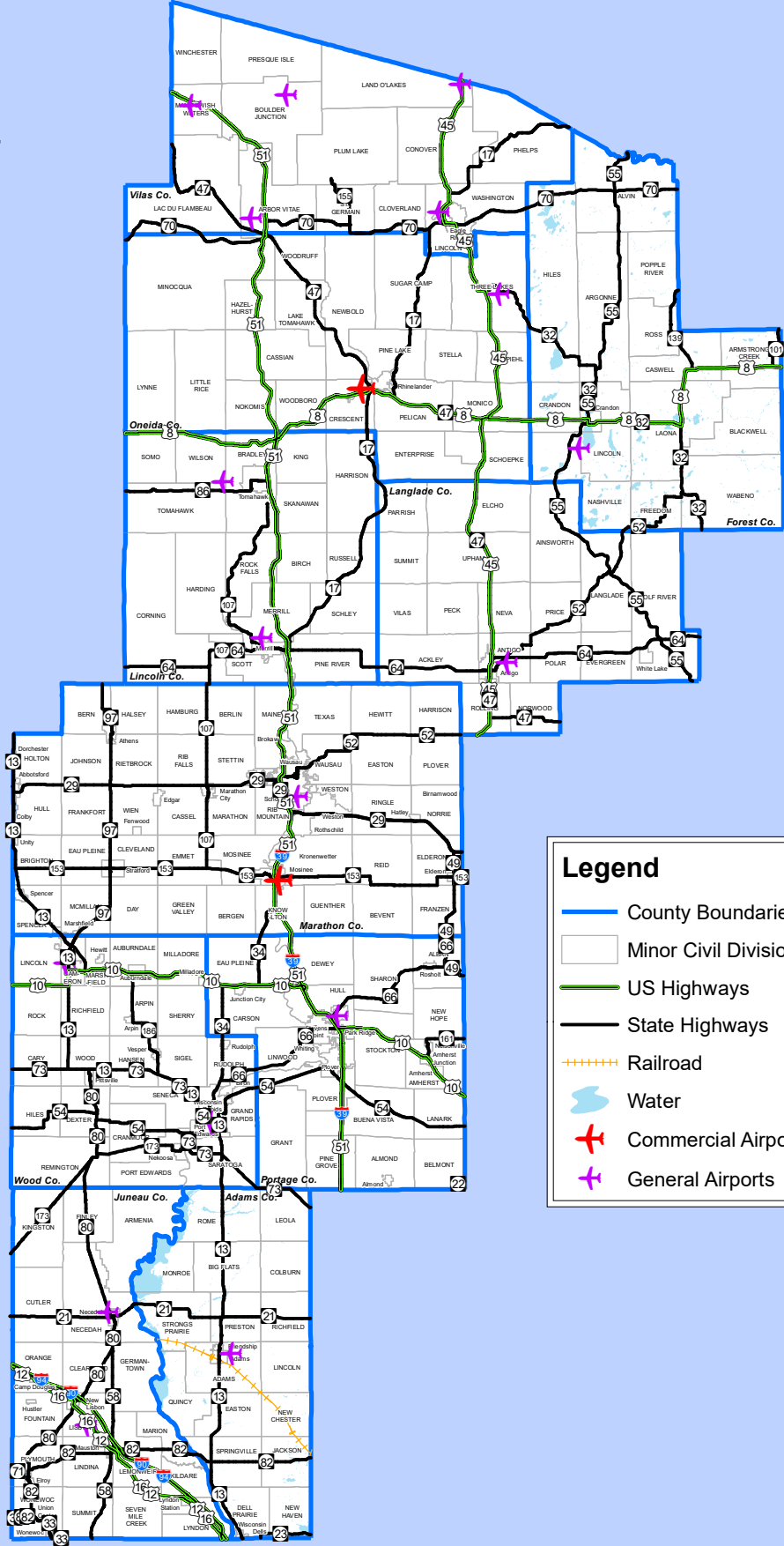
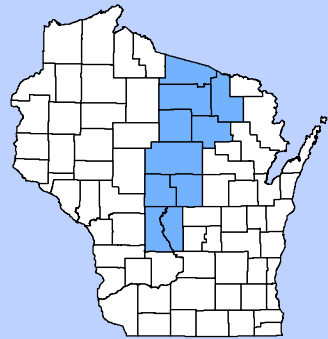


This page intentionally left blank.



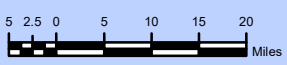
This page intentionally left blank.



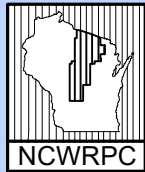
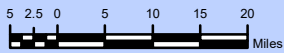
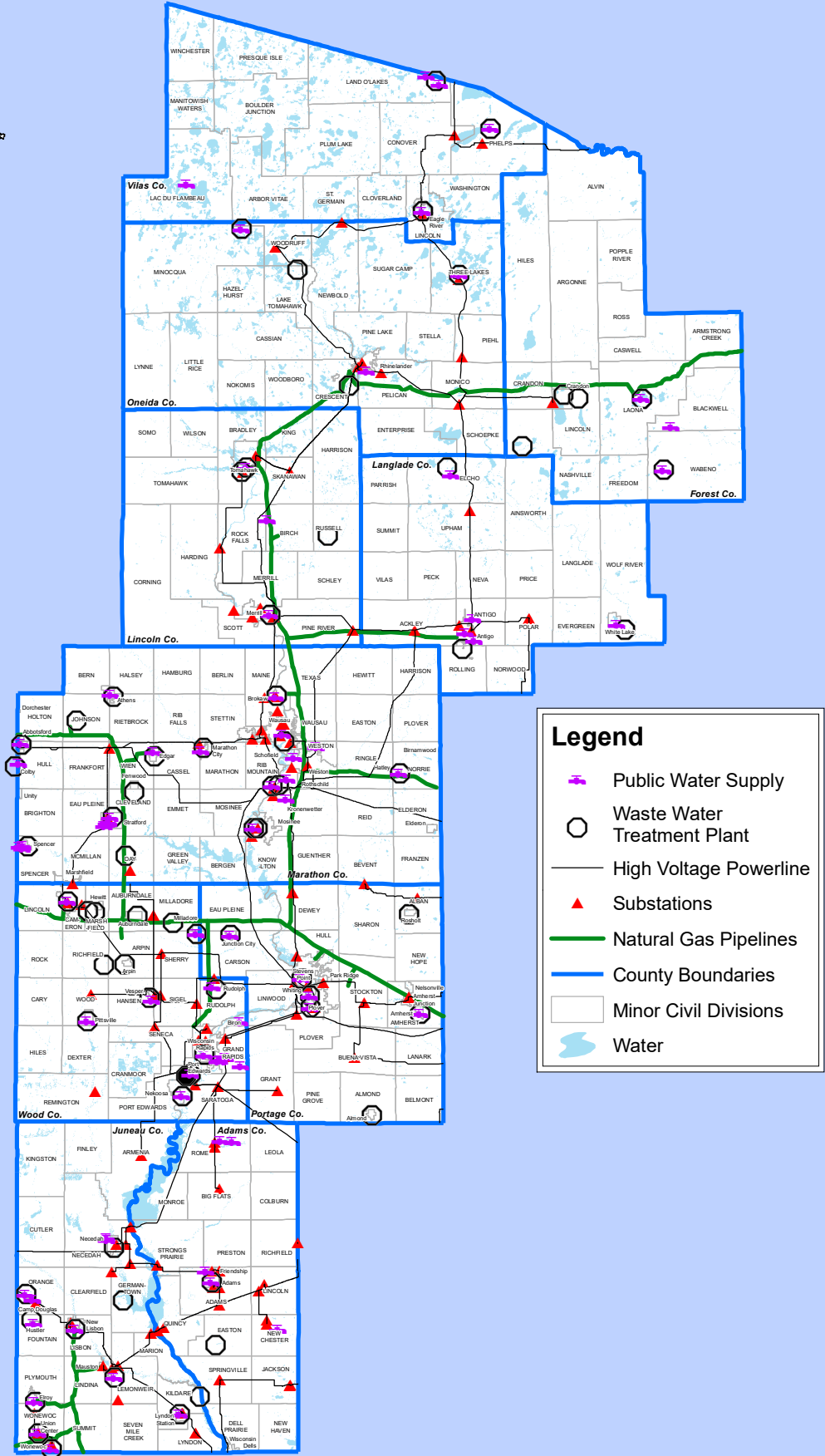
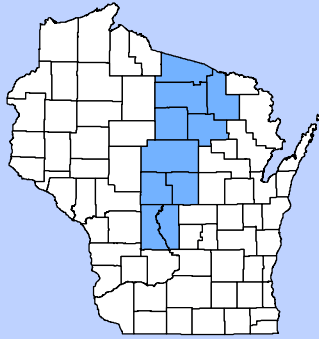


**Legend**

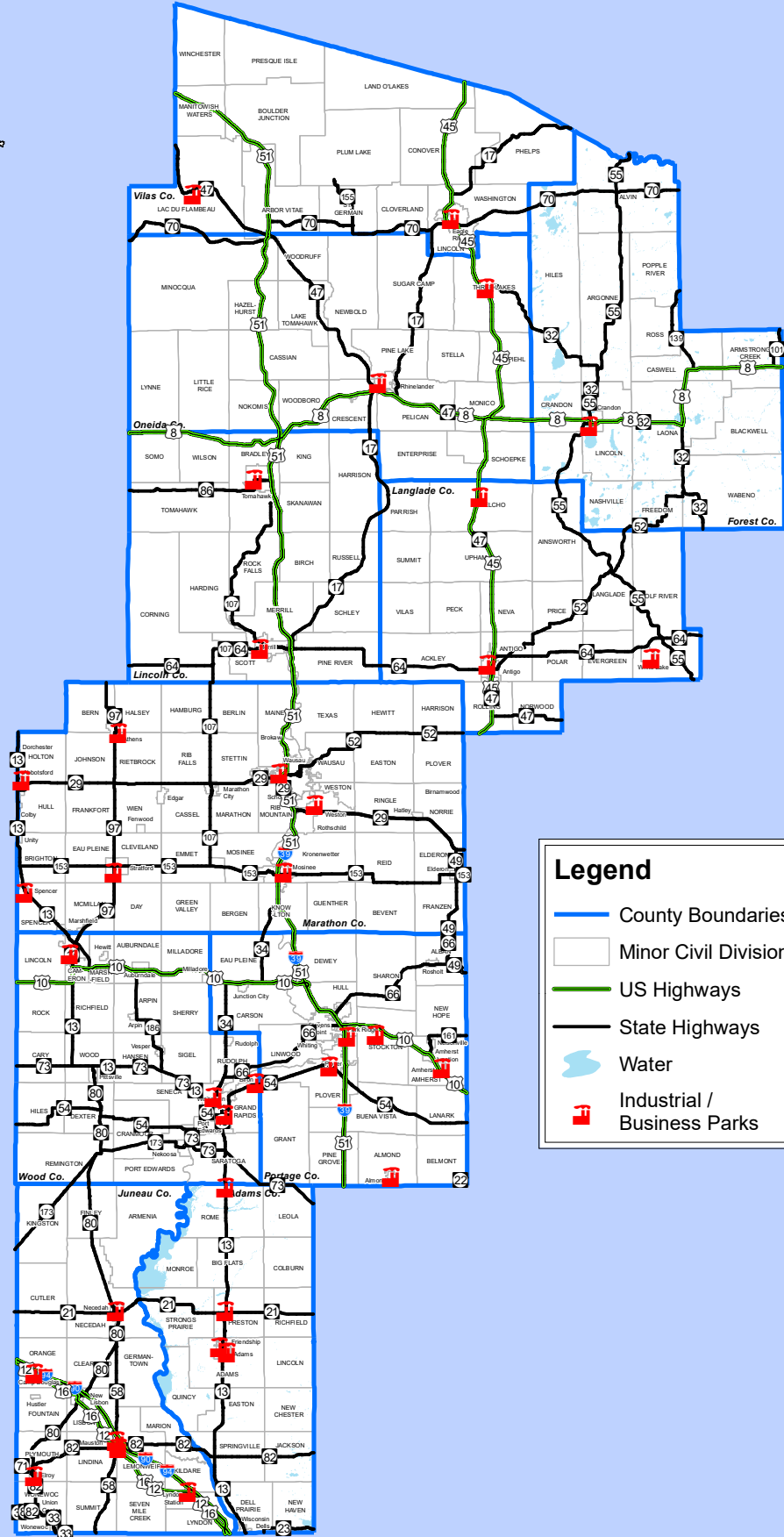
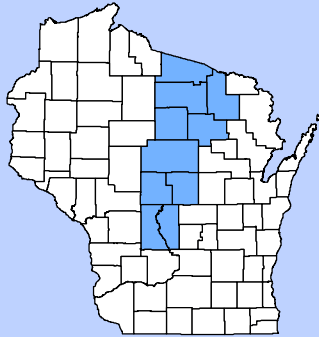
- County Boundaries
- Minor Civil Divisions
- US Highways
- State Highways
- + + + + + Railroad
- Water
- ✈ Commercial Airports
- ✈ General Airports



This page intentionally left blank.

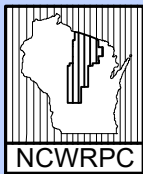
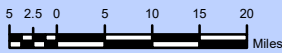


This page intentionally left blank.



**Legend**

- County Boundaries
- Minor Civil Divisions
- US Highways
- State Highways
- Water
- Industrial / Business Parks



This page intentionally left blank.

**Attachments:**

**Population by County, Region and State  
Employment by County, Region and State  
Regional Priority Projects  
Resolution of Adoption**

This page intentionally left blank.



Population by County, Region & State						
	2000	2005	2010	2015	2020	00-20 % Change
Adams	19,920	21,224	20,875	20,857	20,701	3.9%
Forest	10,024	10,213	9,304	9,287	9,183	-8.4%
Juneau	24,316	26,656	26,664	26,987	27,250	12.1%
Langlade	20,740	21,389	19,977	19,907	20,063	-3.3%
Lincoln	29,641	30,402	28,743	28,835	28,800	-2.8%
Marathon	125,834	131,377	134,063	135,341	137,237	9.1%
Oneida	36,776	38,073	35,998	36,232	36,268	-1.4%
Portage	67,182	69,365	70,019	70,940	71,670	6.7%
Vilas	21,033	22,215	21,430	21,590	21,769	3.5%
Wood	75,555	76,644	74,749	74,965	75,381	-0.2%
Region Total	431,021	447,558	441,822	444,941	448,322	4.0%
State	5,363,715	5,580,757	5,688,040	5,753,981	5,854,594	9.2%

Source: WI DOA

Employment by County, Region & State						
	2000	2005	2010	2015	2019	00-19 % Change
Adams	8,454	9,007	8,005	7,724	7,733	-8.5%
Forest	4,356	4,606	3,755	3,698	3,803	-12.7%
Juneau	12,116	12,508	12,331	12,816	12,999	7.3%
Langlade	10,248	10,034	9,063	8,898	8,932	-12.8%
Lincoln	15,401	14,965	13,889	14,495	14,509	-5.8%
Marathon	69,355	71,307	66,695	70,499	71,419	3.0%
Oneida	18,673	19,062	17,123	17,560	17,071	-8.6%
Portage	37,155	38,004	36,671	37,767	37,327	0.5%
Vilas	10,370	11,065	9,177	9,300	9,721	-6.3%
Wood	39,121	37,319	36,257	32,526	33,786	-13.6%
Region Total	225,249	227,877	212,966	215,283	217,300	-3.5%
State	2,868,382	2,878,086	2,814,393	2,951,132	3,001,215	4.6%

Source: WI DWD

This page intentionally left blank.

**North Central Wisconsin Regional Planning Commission  
Critical Priority Projects**

<b>County</b>	<b>Community</b>	<b>Description</b>
<b>Adams County</b>	County	Feasibility/Business Incubator Facility
	County	Broadband Study
<b>Forest County</b>	City of Crandon	Expansion of Industrial Park
	Town of Laona	Creation of Industrial Park
	County	Broadband Study
<b>Juneau County</b>	City of Elroy	Development of Industrial Park
	City of Elroy	Flood mitigation efforts with sub-station and treatment plant
	City of Mauston	Wastewater Treatment Expansion
	City of New Lisbon	Expansion of Industrial Park
	County	Broadband Study
<b>Langlade County</b>	City of Antigo	Saratoga Industrial Park Expansion
	Village of White Lake	Industrial Park Expansion, including sewer & water extensions
	County	Broadband Study
<b>Lincoln County</b>	City of Merrill	Development of Highway 51 Corridor Business Park
	City of Merrill	Feasibility/Business Incubator Facility
	City of Tomahawk	Upgrade of Industrial Park
	County	Broadband Study
<b>Marathon County</b>	City of Mosinee	Expansion of Industrial Park
	City of Wausau	Northcentral Technical College Transportation Center of Excellence (TATE)
	Village of Marathon City	Development of New Industrial Park
	Village of Hatley	Business Park Development
	City of Wausau	Redevelopment of Downtown Mall for Recovery & Resiliency
	County	Broadband Expansion & Implementation
<b>Oneida County</b>	City of Rhinelander	Water Tower in Industrial Park
	City of Rhinelander	Extended Infrastructure in Industrial Areas
	Town of Minocqua	Establish a Business Park
	Onieda County	Feasibility/Development of New Industrial Park
	Onieda County	Feasibility/Business Incubator Facility
	County	Broadband Implementation
<b>Portage County</b>	Village of Rosholt	Industrial Park Development
	Village of Plover	Business Park Development
	City of St. Point	Business Park Development
	County	Broadband Implementation
<b>Vilas County</b>	City of Eagle River	Industrial Park Expansion
	Lac du Flambeau	Downtown Development Strategy
	County	Broadband Study and Implementation
<b>Wood County</b>	City of Nekoosa	Expansion of Industrial Infrastructure
	City of Wisconsin Rapids	Recovery Strategy related to closed paper mill
	City of Wisconsin Rapids	Library Maker's Space project
	County	Economic Impact Study related to ATVs
	County	Broadband Implementation
<b>Regional</b>	Broadband	Study and implementation throughout the region
	Entrepreneurial Ecosystem	Establish throughout the region
	Childcare	Study and strategy development
	Workforce Housing	Study and strategy development
	Infrastructure	Study and construction to spur development and job growth
	Rail Infrastructure	Multi-modal facility

This page intentionally left blank.

**NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION  
RESOLUTION 2021-1**

ADOPTING 2021 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

WHEREAS, the North Central Wisconsin Regional Planning Commission (NCWRPC) has identified economic development as a regional concern; and

WHEREAS, the NCWRPC has been actively involved in economic development planning and received Federal "designation" as an Economic Development District (EDD) in April 1979; and

WHEREAS, the NCWRPC previously updated its Comprehensive Economic Development Strategy (CEDS) in 2017; and

WHEREAS, adoption by NCWRPC resolution confirms its commitment to supporting the 2021 strategy contained therein; and

THEREFORE, NOW BE IT RESOLVED: that the NCWRPC adopts the *2021 Comprehensive Economic Development Strategy*; and

BE IT FURTHER RESOLVED: that the NCWRPC continues its work as an Economic Development District as designated by the U.S. Department of Commerce, Economic Development Administration (EDA) pursuant to Title IV of the Public Works and Economic Development Act of 1965, as amended.

Adopted this 27th day of January 2021.



\_\_\_\_\_  
Paul Millan, Chairperson



\_\_\_\_\_  
Edmund Wafle, Secretary/Treasurer

**Comprehensive Economic  
Development Strategy (CEDS)  
2021**