
North Central Wisconsin Regional Planning Commission



Comprehensive Economic Development Strategy (CEDS) 2014



"A Five-Year Regional Strategy for North Central Wisconsin"

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ABSTRACT:

- TITLE:** Comprehensive Economic Development Strategy - 2014
- SUBJECT:** An assessment of economic development activities of the North Central Wisconsin Regional Planning Commission over the last decade and the past year. The report's seven sections describe the CEDS Committee, Past Year's Activities, the Physical Region, Changes in the Region's Population, Changes in the Region's Economy, a Regional Development Strategy, and an Economic Development Work Plan. Also included is a list of potential public works projects.
- This CEDS process maintains the Region's eligibility as an Economic Development District (EDD) with the U.S. Economic Development Administration. The District consists of ten counties. These counties are Adams, Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas, and Wood. However, Portage, and Wood Counties do not fully participate in the EDD - only some local communities with these two Counties participate.
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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 provides assistance 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.

NCWRPC is also 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 nearly \$20 million dollars in North Central Wisconsin. 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 are not active members of the EDD which eliminates them from being listed in the CEDS and receiving EDA grants. However, there are some local cities and villages within those counties that are active members and those communities do list projects in the CEDS and are eligible for 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
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
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
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
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
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
Total EDA Investment:					\$ 19,590,970

CEDS Process and Committee

Development of CEDS took place over a six month period in 2013. All county-wide economic development corporations, regional organizations, and others were invited to the meetings. Numerous mailings were made, drafts distributed, comments reviewed, and committee meetings were held. The result of that process is this document.

The CEDS Strategy Committee includes representatives from both the public and private sector. CEDS Committee members are: Richard Bakovka, Tom Haferman, Craig McEwen, Bucky Dailey, Ron Nye, Thomas Rudolph, Doug Williams, Ken Winters, Bruce Trimble, Susan Ryman, Christine Berry, Naletta Burr, Jim Warsaw, Bob Egan, and Daric Smith. The CEDS Committee recommends adoption of the document to the NCWRPC for final adoption.

A variety of groups provided input into the process including the three regional organizations. One organization is called Centergy, which represents five counties in the central area of the Region, another is Grow North, which represents five northern counties in the Region, and the third is the regional workforce agency, the North Central Wisconsin Workforce Development Board.

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.

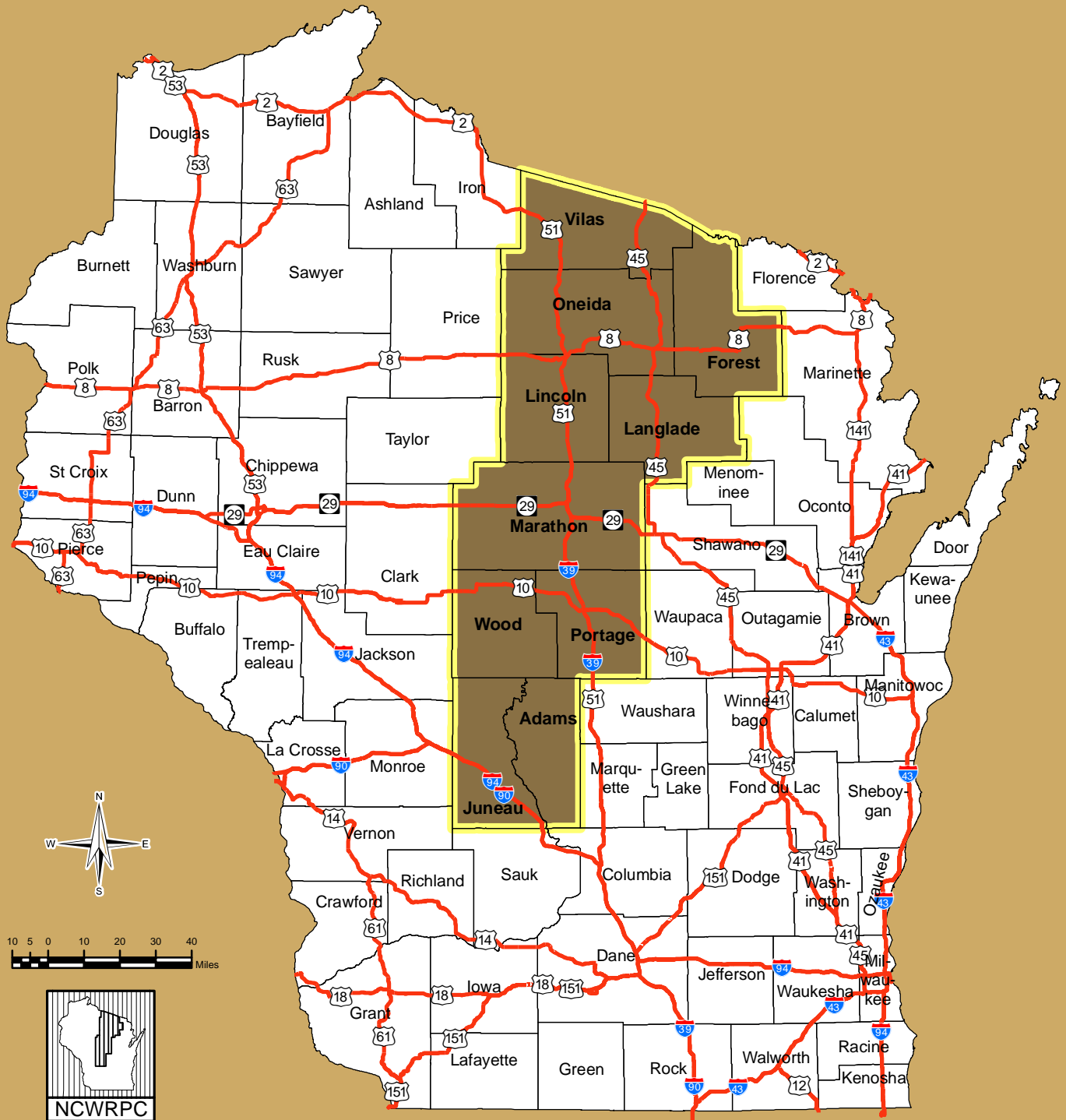
Communities like Rhinelander, Merrill, Wausau, Stevens Point, and Wisconsin Rapids capitalized on their location to form value added industries focused on wood products, agriculture, and manufacturing. As these industries progressed, so did the service-oriented industries such as government, transportation, 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 Region there are 267 local units of government, of which 198 are towns, 38 are villages, 21 are cities and 10 are counties. These ten counties together are home to over 442,000 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 considered to be 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 65,000 persons.

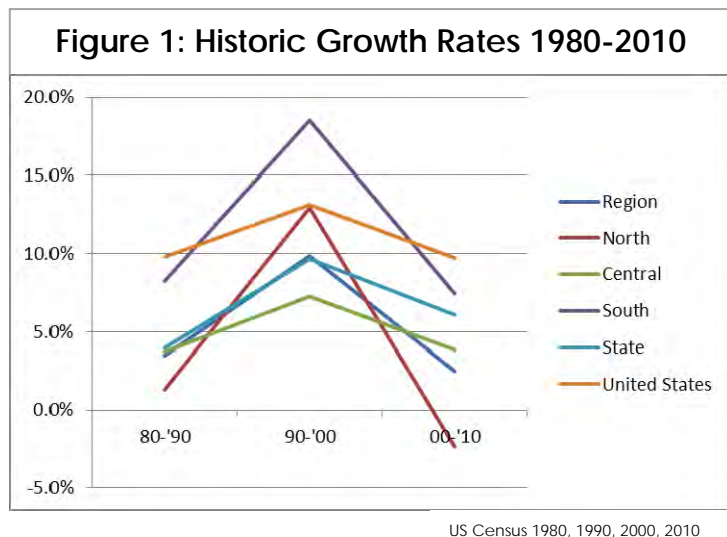


Chapter 1: Demographics & Workforce

Population

The 2013 overall Regional population is 442,286. Five of the ten counties experienced a decline in population, although the Region as a whole did increase about 2.5 percent from 2000 to 2010. (See appendix B, table 6) This is much slower growth than the previous decade where all ten counties increased. Juneau County had the largest percent of population growth between 2000 and 2010 with an increase of 9.66 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 may experience a much higher population than recorded through the US Census.

In 2000, 431,021 people resided in North Central Wisconsin, an increase of 8.69 percent since 1990. Over the previous decade of 1980 to 1990, the Region's population increased from 379,311 persons in 1980, to 392,402 in 1990, an increase of 3.34 percent. In 1980, the Region accounted for 8.06 percent of the entire State's population, decreasing to 8.02 percent in 1990, and remaining nearly constant in 2000 with 8.03 percent of the State's population.



The 30 year historic growth rate shows that the North Central Region tracks with the trends of the state and nation. Between 1980 and 1990, the Region saw a low growth rate, similar to the rate of growth of our state. Between 1990 and 2000, the Region saw a large increase in population, increasing faster than the state at 9.8 percent. The last decade has seen a reduction in growth rate, although all areas in the Region except for the north saw an increase in population. The south saw the largest growth rate between 1990 and 2000 and has exceeded all of the Regions and the state's growth rate over the 30 year period. In the past decade, the north and central fell below the state's growth rate and all three sub Regions fell well below the national rate of growth. Overall, our Region follows the trends of the state and nation, but at a lower level and with more drastic changes.

In terms of total population, Marathon County's 2013 population of 135,744 people makes up 31 percent of the Region's population. Wood County with 74,857 and Portage County with 70,580 follow as second and third in terms of the Region's populations. Combined, these three counties represent 64 percent of the Region's population. The remaining seven counties are very rural in character with populations ranging from about 9,000 to 36,000.

Throughout the document the tables include a North Central and South summary. 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.

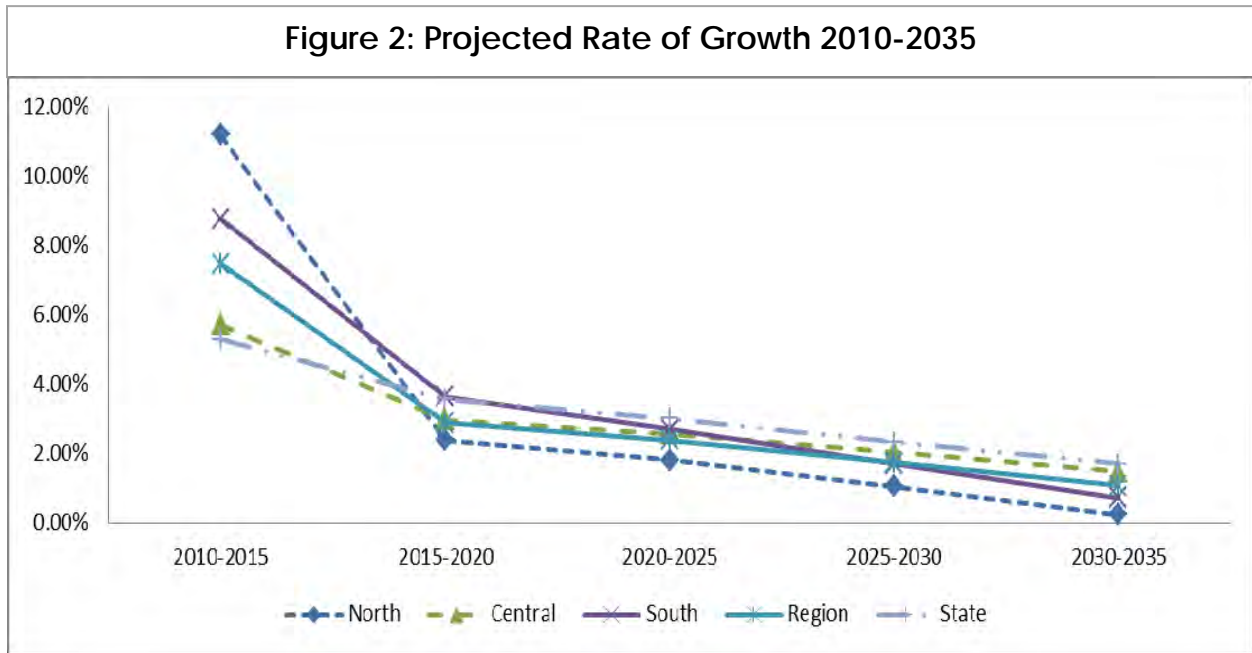
Seasonal Dwellings

The continuing increase in seasonal dwellings in most counties indicates that the north woods (including Adams and Juneau County) continues to draw people, but that a likely effect of the Great Recession has been to lead the owners of many of these seasonal dwelling to postpone their retirement. Nearly three-quarters of all seasonal dwellings in the Region are in the northern sub-district, with another fifth in the south. (See appendix B, table 7) "Second homes" are a minor factor in the housing picture in the central sub-Region and are a growing consideration in the south. The fact that seasonal dwellings increased throughout the Region, in spite of 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 not always counted in the population count as they claim full time residency in other parts of the state and country and are counted in those population counts. This creates a misrepresentation of the actual population in the north and south sub Regions as many homes in the area are seasonal homes. 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 show that North Central Wisconsin can expect a growth in population for the next 22 years (See Appendix B, table 8). These projections show that the highest rate of population growth will occur between 2010 and 2015. The northern Region will show the highest rate at 11.2 percent and the entire Region will have a higher rate of growth than the state. Tracking

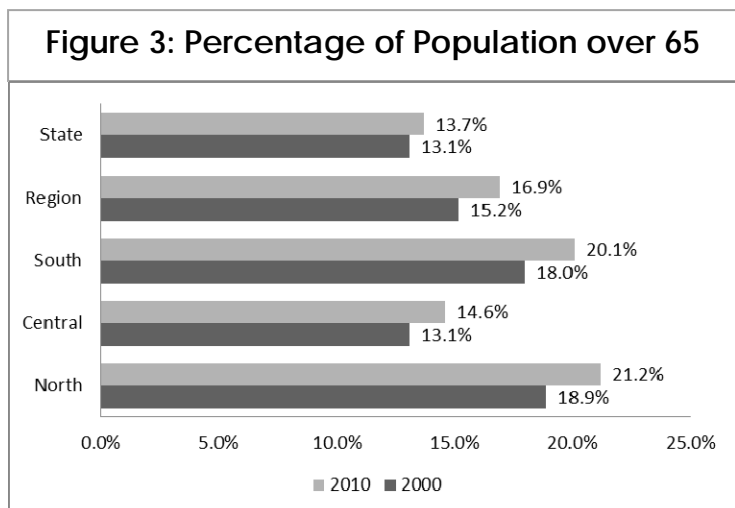
with the state trend, our Region will see a slow rate of growth from 2015 to 2035. The rate of growth for the Region will go from 2.9 percent in 2015 to 1.1 percent in 2035. During that period, our Region will grow at a slower rate than the state, and Forest and Wood counties are shown to lose population.



U.S. Census, 2000, 2005, 2010; WI DOA

Population Age

According to The Bureau of Labor and Statistics, the baby-boom generation will move entirely into the 55-years-and-older age group by 2020. This has been shown in the North Central Region as the percent of population over 65 years of age increased from 15.2 percent to 16.9 percent of the population from 2000 to 2010. Future population projections show the 60 years and older

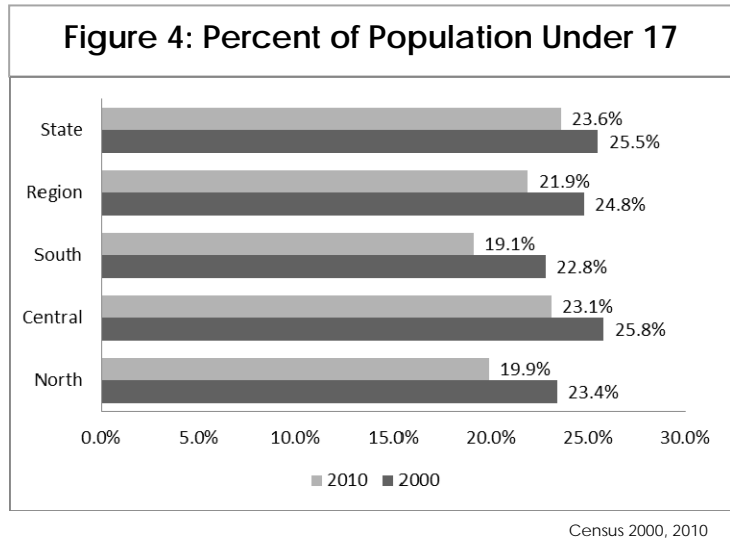


US Census 2000, 2010

demographic increasing at a rate of 61.6 percent from 2010 to 2035 and the 85+ demographic increasing 85 percent over the 25 year time period. (See Appendix B, table 9) By 2035, the Region will have 172,130 people aged 60 and older making up 33 percent of the Region's

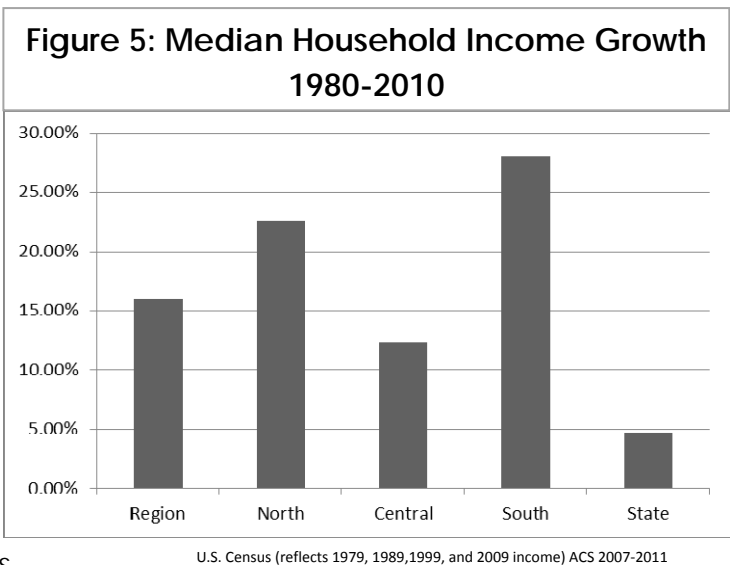
population compared to 23 percent in 2010. The north and south sub Regions look to be impacted the most by the increase in the older demographic as they show a projection of a negative rate of growth in population aged 59 and younger.

The Region's growing population of those over 60 years of age is further impacted by the reduction in those aged 17 and under. Between 2000 and 2010, the North Central Region had a 3.9 percent reduction in population aged 17 and under. The south and north sub Regions saw the largest reductions over that time period of 3.7 percent and 3.5 percent respectively. Future projections show the 19 and under population increasing in the Region at a rate of 3.9 percent over 25 years, well below the state projection of 10.2 percent. The central sub Region is the only sub Region to see any growth in any population under the age of 60 by 2035 with a 6.5 percent increase in population aged 19 and under and a 6.7 percent increase in population aged 35 to 44.



Income Trends

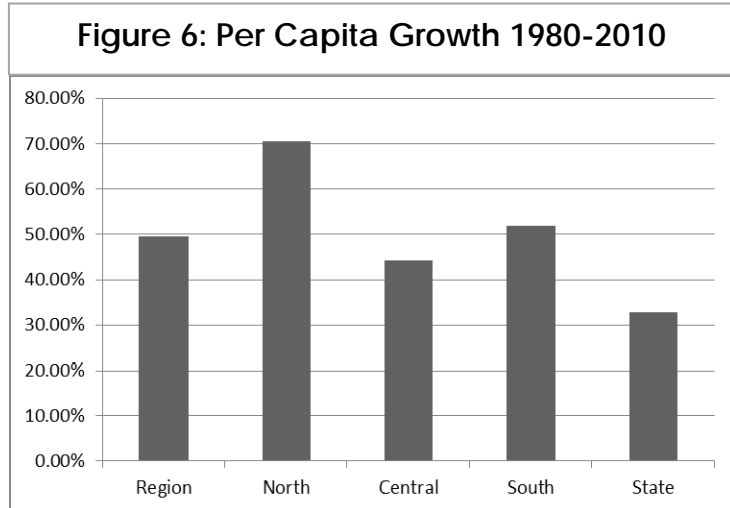
There are two measures of income: median household income and per capita income. Median household income provides an indication of the economic ability of the typical family or household unit while per capita income provides a measure of relative earning power on a per person level. As identified in the Issues and Opportunities Element of this plan the Median Household income in 2010 was \$45,045 and the Per Capita income was \$25,012. (See Appendix B, table 10 and 11)



Both Median and Per Capita Incomes have risen over the last thirty years, by 74

and 140 percent respectively. Both of these rates exceed state growth rates for the same time period.

The U.S. Bureau of Economic Analysis ranked Wisconsin 25th in the nation with respect to personal per capita income; this has remained steady from a ranking 24th in 1980. While Wisconsin is not among the wealthiest states in the nation, it does rank in the top half.



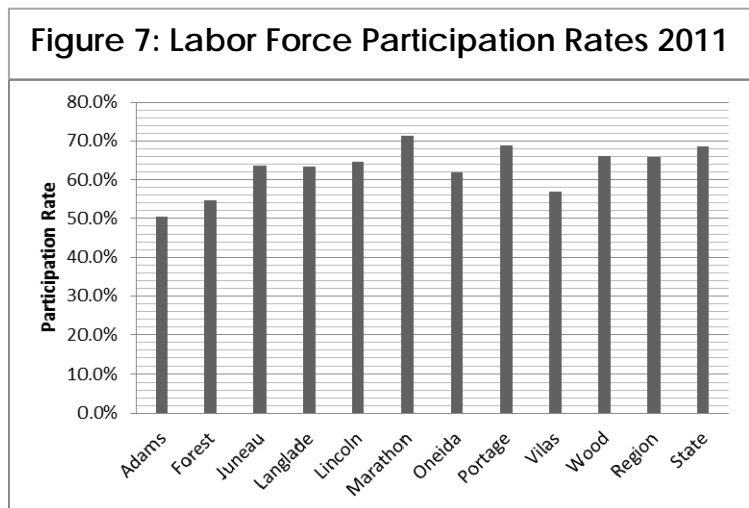
U.S. Census (reflects 1979, 1989, 1999, and 2009 income)

The Region increased in per capita income slightly more than the state, but both fared far better than the nation as a whole. Over the last thirty years within the Region, Forest County showed the highest gain in per capita income while Lincoln County showed the lowest. Income gains were relatively uniform in each sub-Region however.

Workforce

Population & Labor Force

The total Regional labor force is related to the overall population, 16 years of age and older 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. In 2011, the population was 441,593 and the labor force was 235,025 (See Appendix B, table 12).



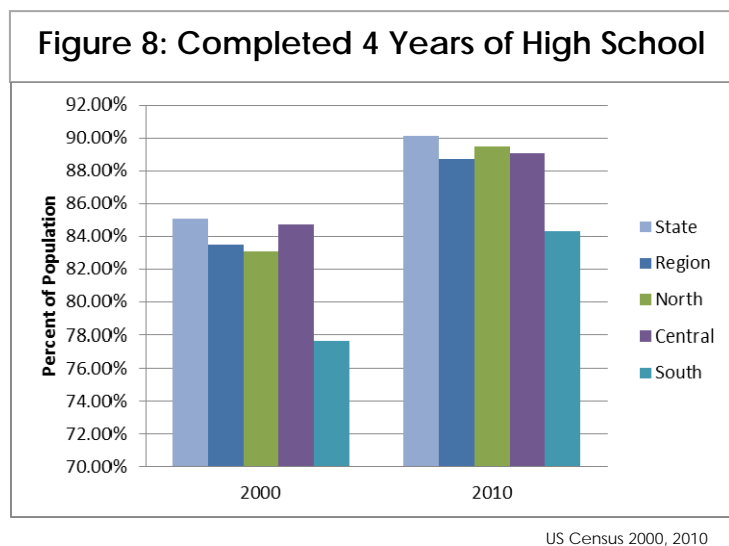
2007-2011 American Community Survey

Much of the growth in the Region's labor force has been due to the increase in the population. In 1980, only 61 percent of the population over 16 was in the

labor force. By 2000, that rate increased to 67 percent and has remained steady through 2011 at 65.8 percent. The central counties have the Regions highest participation rates. Marathon (71.4%), Portage (68.8%) and Wood (66.2%) also make up 64 percent of the Regions total population; have the lowest percentage of residents over 65 years of age and the highest percentage of residents under 17. Adams County has the lowest participation rate (50.5%) in the Region and the highest unemployment rate at 9.3 percent. Only two counties, Marathon and Portage exceeded the state's 68.7 percent participation rate in 2011

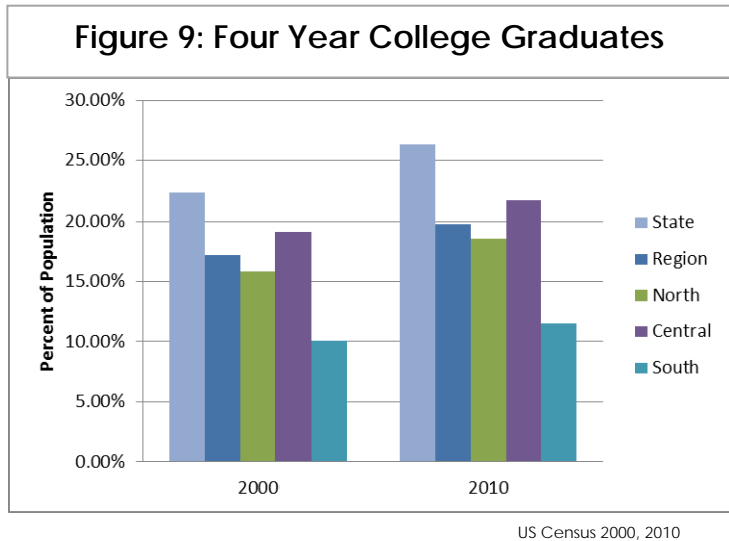
Education

Educational attainment levels have increased substantially in the Region from 1990 to 2010. In 1990, only 75.5 percent of the population 25 and over had completed four years of high school or more. By 2010, that rate increased to 88.7 percent. (See Appendix B, table 13) All three sub-Regions also have seen a substantial increase in high school educational attainment levels. In 2010, the north sub-Region had the highest percentage of population who has completed four years of high school, followed by the central 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 1.7 percent deficit in 2010.



The rate of persons with a bachelor 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 percent; meanwhile by 2010 the Region's rate was 19.8 percent to the state's rate of 25.8 percent for a difference of 6.0 percent. (See Appendix B, table 14) Educational attainment levels for those who have completed a bachelor degree or better did increase significantly for the Region despite the fact it lagged behind the state. All three sub-Regions also have seen a significant increase in post-secondary educational attainment levels. In 2010, the central sub-Region had the highest educational attainment rate, followed by the north and south.

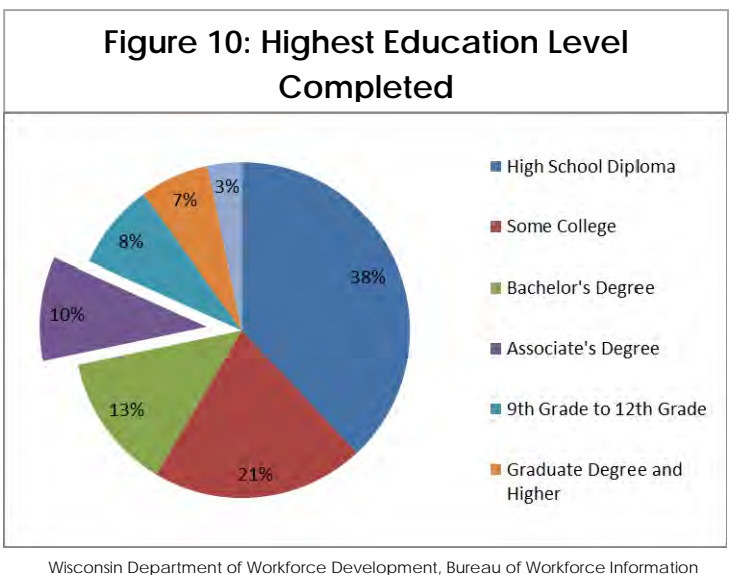
Taken together these two education indicators show a Region that is improving its education attainment levels, but with a significant gap in higher education. An increase in high school graduates point to a skilled workforce able to support the kind of manufacturing industry which has been the backbone of the Regional economy for many years. If the Region is to adjust to the requirements of the developing, knowledge based economy, it will be necessary to increase the number of the college educated persons in the Region.



Vocational and Technical Education

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 vocational-technical education system and the training available are of particular importance. As business and industry continues to grow and change, the demand for highly trained and skilled labor grows. 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.



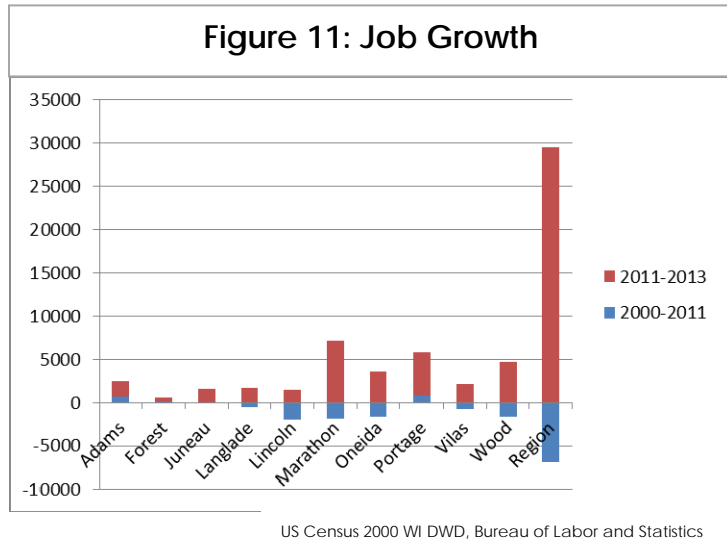
Partnerships between local businesses, governments, and educational institutions are very useful in developing the Regional economy. In 2013, roughly 10 percent of the Region's population had completed an associate's degree at a local institution (US Census). Institutions such as UW-Stevens Point, UW 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 (Rhinelander 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; Mid-State, Nicolet Area, Northcentral, and Western Wisconsin Technical College had a total 2009-2010 enrollment of 56,219 people. Of those, 17,859 were enrolled for an associate's degree, 5,476 were enrolled for a technical diploma, and 28,097 were enrolled as a vocational adult. (Wisconsin Blue Book 2011-2012)

Organizations such as the North Central Wisconsin Workforce Development Board are important to this process as well. The North Central Wisconsin Workforce Development Boards Development Area Six is comprised of the ten counties in the North Central Region and offers workers access to training programs, business services, industry information and advocates the development, support, and coordination of an integrated service delivery system that develops a skilled workforce for a thriving economy in the Region.

Chapter 2: Regional Economy

Employment

Between 2000 and 2013, North Central Wisconsin gained nearly 22,600 jobs, matching the State's job growth rate at 11.4 percent. (See Appendix B, table 15) The majority of the Regional job growth has occurred in the past two years. Between 2000 and 2011, the Region lost 6,947 jobs and had a negative job growth rate of 3.5 percent. Over the past two years, the Region has gained 29,544 jobs at a rate of 15.5 percent. All



counties except Lincoln (-540) saw an increase in jobs over the past thirteen years. Adams County saw the largest job growth at 70.6 percent and seven of the ten counties saw double digit job growth. The central Region gained the most jobs (14,153) between 2000 and 2013, but the south Region saw the largest job growth at 33.6 percent. The Region's share of total state employment in 1980 was 6.6 percent, that share increased to about 7.3 percent in 2000, and has remained steady through 2013 at 7.4 percent.

Between 2000 and 2010 the Region struggled to increase jobs as the national recession impacted key industries in our Region. After a decade of negative job growth, the Region has experienced an increase in jobs exceeding the Regions peak in 2000.

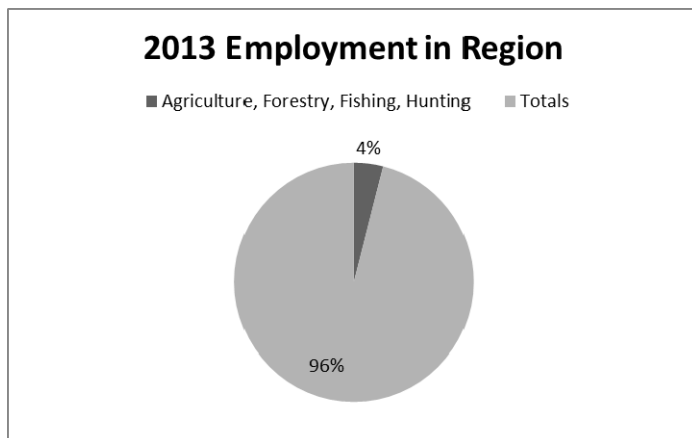
Employment by Sector

The Regional employment by major economic sector (2 digit NAICS) declined 4.45 percent from 2001 to 2013. (See Appendix B, table 16) The Region saw a majority of that reduction of employment between 2001 and 2010 where the Region's employment decreased at a rate of 4 percent. Over the past three years, the Region has begun to improve showing a slight decrease in employment at -.5 percent. The Regions two biggest sectors, manufacturing

and retail, have improved significantly in the past three years. Between 2001 and 2010, manufacturing and retail trade employment decreased 27 percent and 12.5 percent respectively. In the past three years, manufacturing and retail trade has improved to 1.54 percent growth and -.03 percent growth. After losing 12,040 manufacturing jobs between 2001 and 2010, the Region added 499 jobs in the past three years. All sectors with negative growth between 2001 and 2010 showed improvements between 2010 and 2013. However, of the sectors that showed a positive growth between 2001 and 2010, all but one (Management of Companies and Enterprises) showed a reduction in job growth between 2010 and 2013.

Agriculture, Forestry, Fishing & Hunting:

The Agriculture, Forestry, Fishing and Hunting 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.



Wisconsin Department of Workforce Development, Bureau of Workforce Information

Between 2001 and 2010, this sector grew by 2 percent. Over the past 3 years, this sector has shown slower growth at .87 percent. Overall, this industry added 78 jobs between 2010 and 2013 and 258 over the past 13 years. Nearly 9,100 persons are employed in this sector which accounts for 4.1 percent of total employment in the Region.

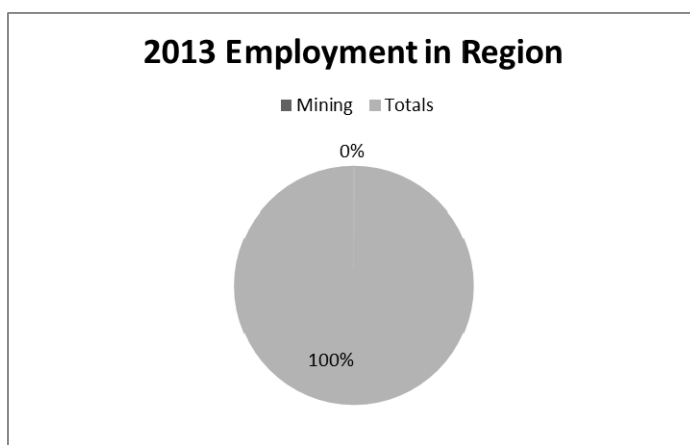
The Region’s climate, soil, and water are well suited for the dairy industry, and the production of: potatoes, oats, barley and hay, snap beans, green peas, sweet corn, soybeans, cranberries, ginseng and trees. The timber produced in the area, both hard and soft wood, supplies the lumber mills, the pulp 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 would have a substantial impact within the Region.



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The North Central Region had a reduction of 77 jobs from 2001 to 2013 resulting in a 41 percent reduction in mining employment. This reduction has tapered off over the past three years. The mining sector saw an 11.3 percent reduction over the past 3 years, compared to a 33.7 percent reduction between 2001 and

2013. There are 10 people in our Region accounting for .05 percent of total employment in the Region.

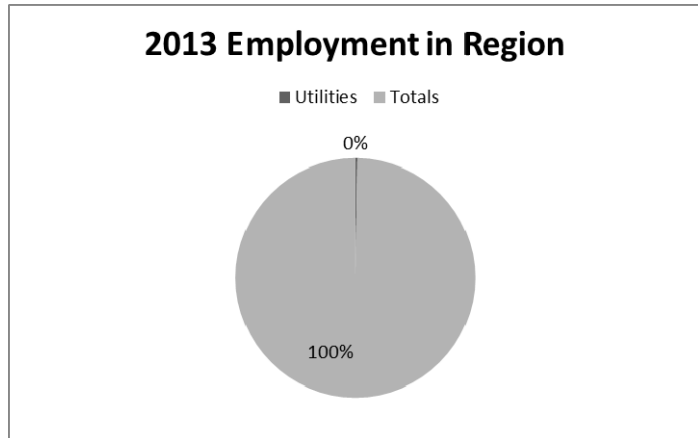
Recently there has been a dramatic increase in the number of "Frac Sand" mining proposals. This increase is attributed to a surge in hydrofracking, a technique used by the petroleum industry to extract natural gas and/or crude oil from rock formations, which requires a certain quality of sand in the process. Wisconsin possesses high-quality sand resources and therefore is seeing a substantial rise in mining permit requests to mine for frac sand. The most likely activity of this would be in Adams, Juneau, Portage and Wood Counties.

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 13 years employment in the utilities sector has grown by 54 percent and has grown by 12.6 percent in the past three years. Overall, the utilities sector results in 0.3 percent of the Regions employment. A new biomass plant is now operational in Rothschild, Wisconsin and this plant is expected to have a limited impact on the utilities sector but will have a large impact on the Agriculture, Forestry, and Fishing sector.

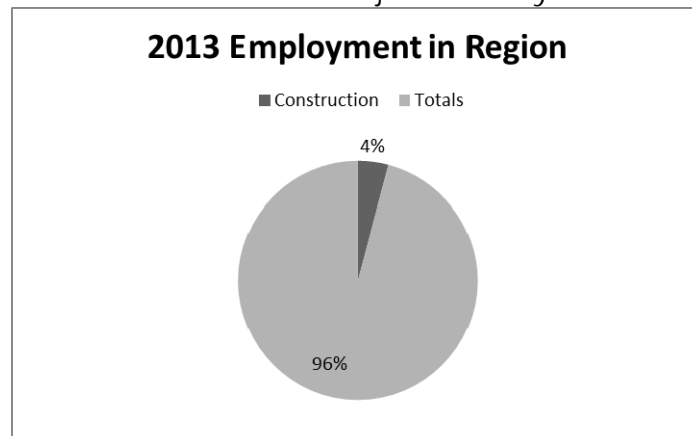


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Construction:

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 13 years the Region and the state have experienced a large decline in construction jobs mainly due to the downturn in the economy due to



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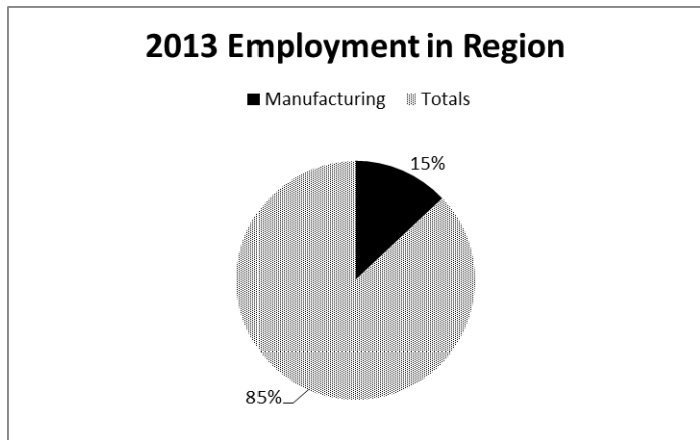
the housing crisis of 2008. Between 2001 and 2010 the Region experienced a decline of 15% in the construction sector, this outpaced the state (25%) and national (19%) decline over the same time period. From 2010 to 2013, this sector saw an additional 5 percent reduction in employment resulting in a total

reduction of nearly 20 percent over the past 13 years. Over 9,500 persons are employed in this sector which accounts for roughly 4 percent of total employment.

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.

Between 2001 and 2010, this sector declined by 27 percent. However, over the past three years this sector has seen a 1.5 percent increase in employment. The Region experienced substantial losses in paper and wood product manufacturing between 2011 and 2012. The losses from plant closures offset sizable gains in other subsectors. For example, metal fabrication and machinery manufacturing grew by 8.3 percent and 3.9 percent, respectively, in 4 Regional counties where data are available (WI DWD Labor Trends 2013 Quarter 2). Nearly 33,000 persons are employed in this sector in North Central Wisconsin. Manufacturing is the largest employer in North Central Wisconsin, accounting for roughly 15 percent of total employment.

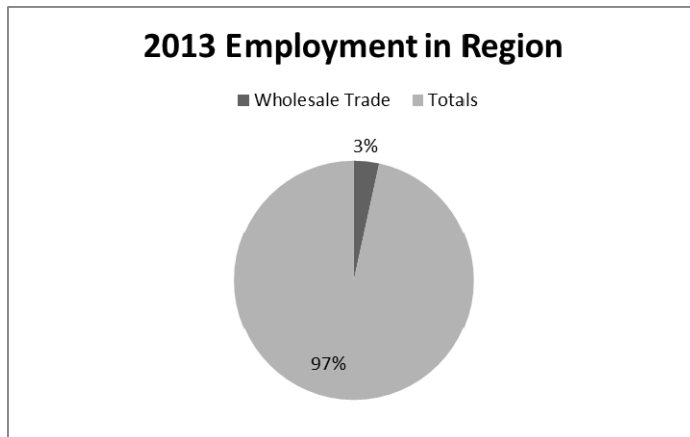


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Although the manufacturing sector has been on a decline nationally it is a crucial sector for North Central Wisconsin. Improvements in technology have increased productivity, which has led to a reduction of employment in this sector. Despite the 26 percent decline of employment from 2001 to 2013 in this sector, the commission recognizes the importance of manufacturing jobs to the Region as manufacturing creates a significant ripple effect through the entire Region.

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.



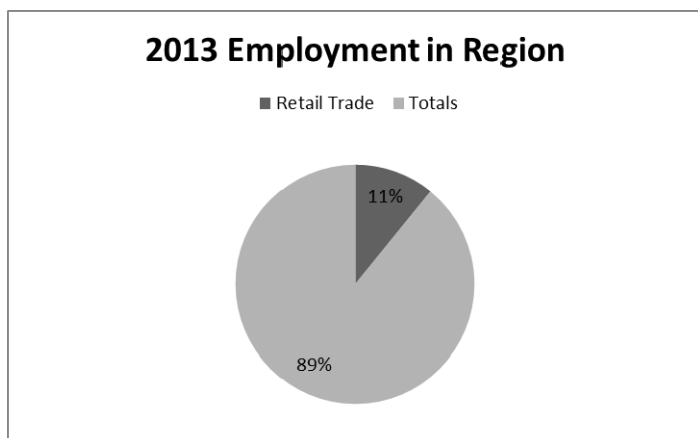
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Between 2001 and 2013, this sector increased by 1.81 percent. That increase took place over the past 3 years where the sector increased roughly 3% after decreasing 1.1 percent from 2000 to 2010. Over 7,700 persons are employed in this sector which accounts for 3.5 percent of total employment in the Region.

Retail Trade:

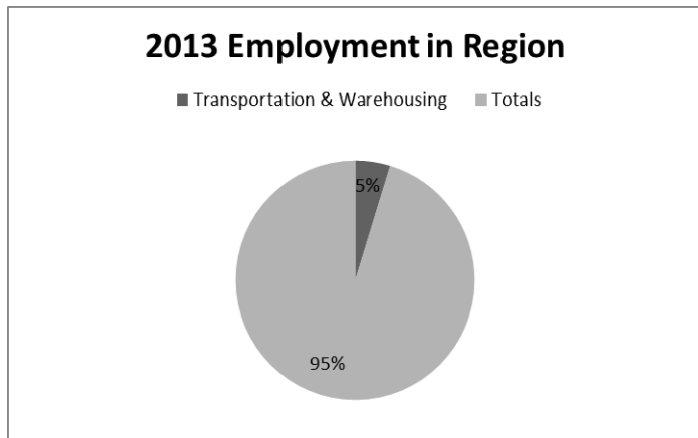
The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise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

Between 2001 and 2010, this sector decreased by 12.5 percent. Over the past 3 years, the retail sector saw a 0 percent growth indicating stabilization on employment. 26,842 persons are employed in this sector, which is the fourth-largest employment sector, accounting for over 11 percent of total employment.



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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.

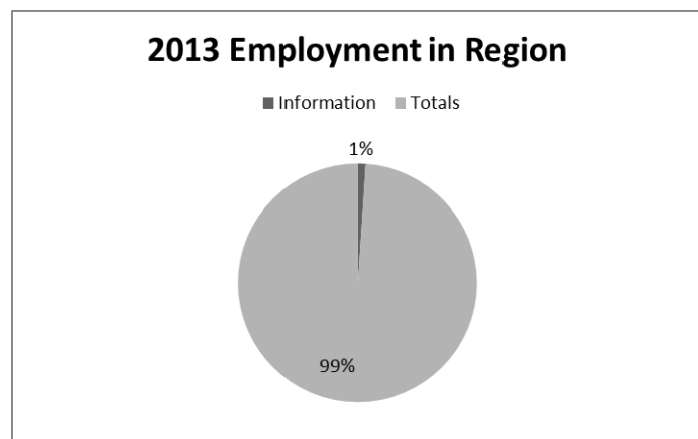


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From 2001 to 2010 this sector decreased by 2.3 percent in North Central Wisconsin. However, from 2010 to 2013, this sector has increased 3.7 percent resulting in an increase of 1.3 percent from 2001-2013. 10909 persons are employed in this sector accounting for 5 percent of the Regions 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



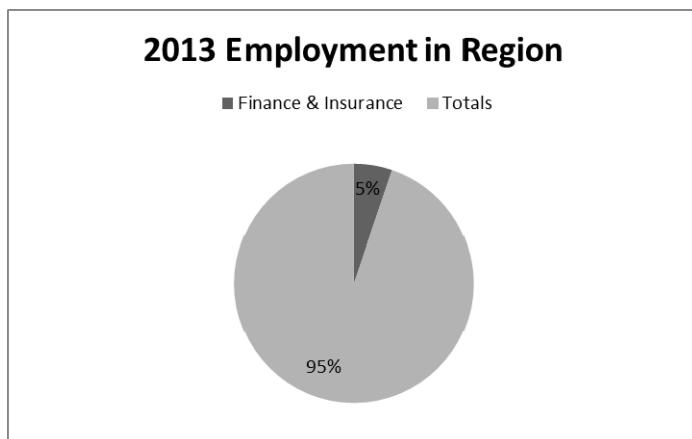
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telecommunications industries; Web search portals, data processing industries, and the information services industries.

Between 2001 and 2010 this sector experienced a decline of over 24 percent in the Region and continued to decrease between 2010 and 2013 at 9 percent. 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. Since 2001, this sector has lost 1,038 employees and now accounts for 1 percent of the Regions employment.

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.



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From 2001 to 2010 this sector grew by 10 percent regionally, and has remained stable with a minor decrease of .4 percent over the past three years. Employment in this sector accounts for over 5 percent of the Regions employment with 12,088 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.

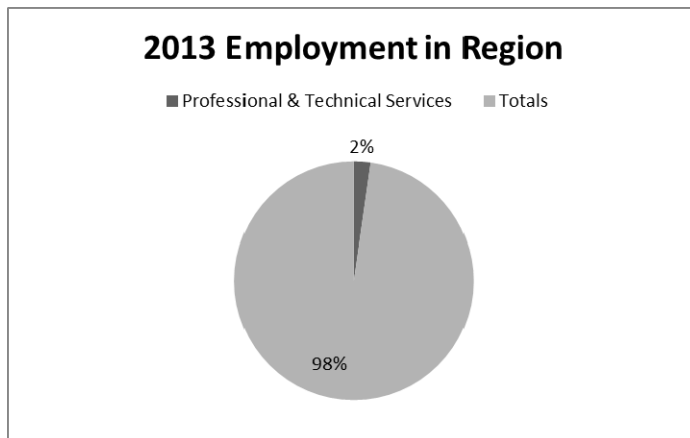
From 2001 to 2010 this sector decreased by just fewer than 2 percent in the Region and has decreased an additional 8 percent over the past three years. The decline of this sector from 2000 to 2013 can be attributed to the housing crisis in 2008 and recession that ensued shortly thereafter. In 2001 1671 persons worked in the real estate sector compared to 1,508 in 2013. Persons working in the real estate market now make up just .6 percent of the Regions employment.



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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.



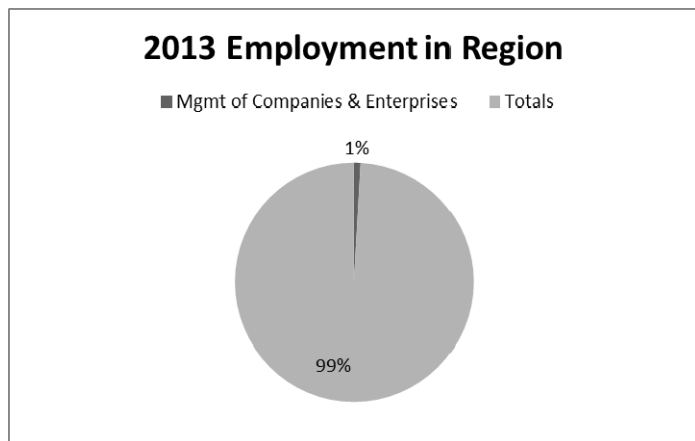
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Between 2001 and 2013 employment in this sector grew by 8 percent in the Region. However, the sector has seen a reduction in employment of 38 persons in the past three years. The professional and technical services now accounts for 2.3 percent of the Regions employment.

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.

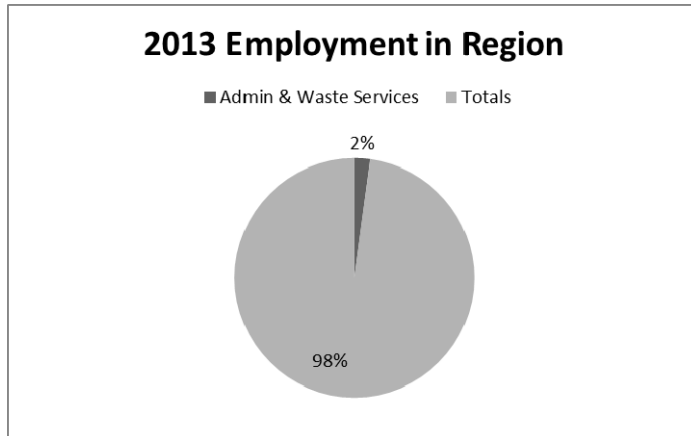
The Region experienced a growth of 35 percent in employment from 2001 to 2013. The majority of that growth occurred between 2010 and 2013 where the Region saw a 31 percent increase in employment. This sector is the only sector to see positive growth between 2001 and 2010 and increase that growth in the last three years. Although the Region had a significant increase in this sector, this sector still comprises a small percentage of all employment making up just .9 percent of the Regions employment.



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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.



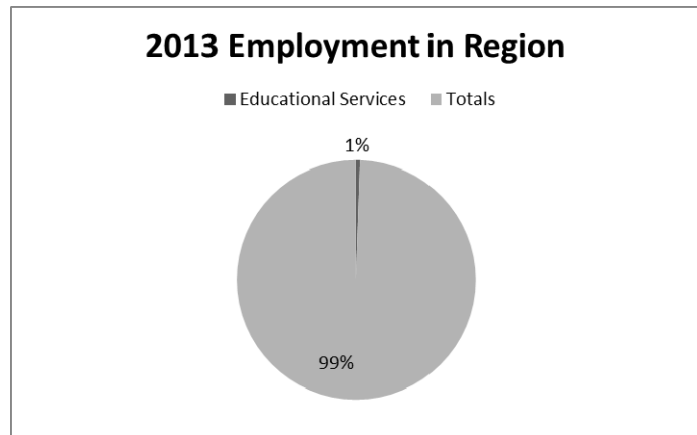
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North Central Wisconsin increased employment 25 percent in the sector from 2001 to 2010. After a decade of growth, the sector saw a decrease in employment of 11.8 percent over the past three years resulting in a reduction of 636 persons employed in the industry. Overall, the sector has increased employment by 447 persons in the past 13 years making up 2 percent of the

Regions employment with 4754 persons working in the administrative and waste services in 2013.

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.



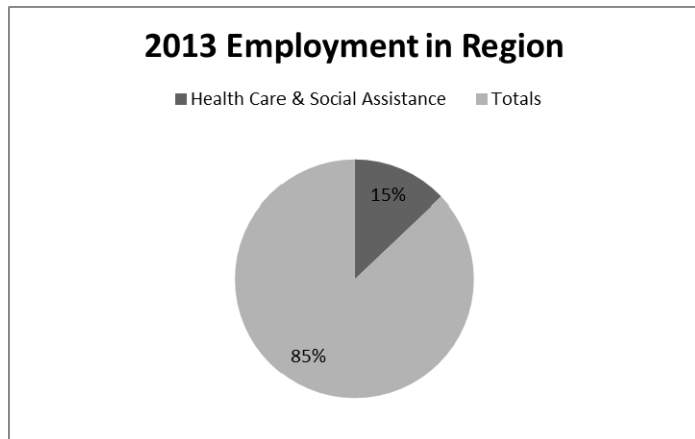
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Between 2001 and 2010 the educational services sector had a 12.6 percent decrease in employment Regionally. However, this sector has shown improvements over the past three years with a slight decrease of .81 percent between 2010 and 2013. The education services sector employs 1223 persons in the Region making up .55 percent of the Regions employment.

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.

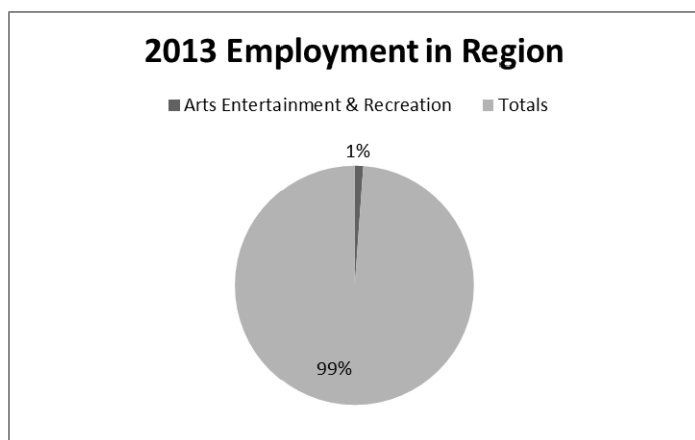


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From 2001 to 2010 the health care and social assistance sector had a large growth in employment in the Region. The Region had a 22 percent growth rate during that time period. The sector has continued to see growth in the past three years. From 2010 to 2013 the sector saw an additional 2.5 percent growth resulting in a 25 percent growth over the past 13 years. The health care sector is the largest growing sector in the Region adding 6555 jobs to the Region from 2001 to 2013. With 32,664 persons employed in this sector, it is the largest sector in the Region and accounts for 15 percent of the Regions employment.

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



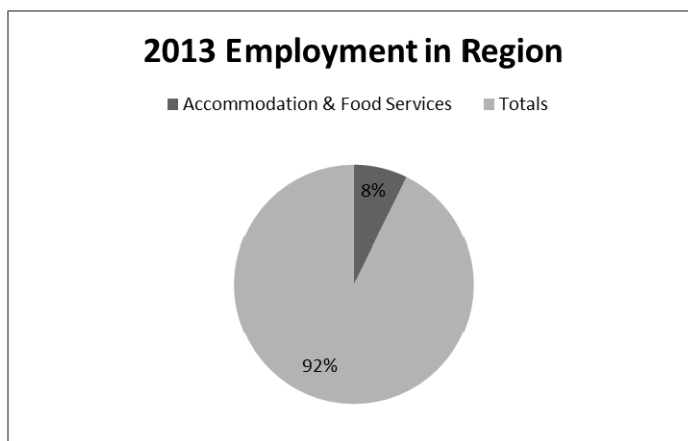
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intended for public viewing; establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

Between 2001 and 2010 this sector experienced a decrease in employment of 7.9 percent. However, over the past three years, the Region has seen a 9 percent increase in employment. Overall, this sector has added 208 jobs in the past three years resulting in a total of 2516 persons employed in this sector. This sector only accounts for 1 percent of employment in the Region.

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.



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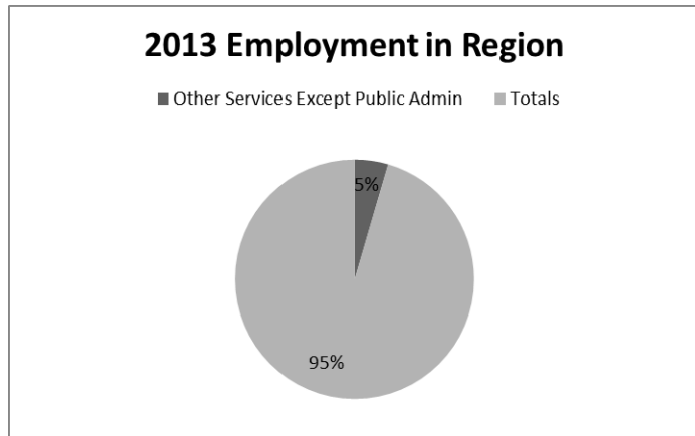
From 2001 to 2010 North Central Wisconsin experienced a 1.28 percent growth in this sector. This growth has remained steady over the past three years with another 1 percent increase. Accommodations and food services is one of the larger sectors in the Region with 17,377 persons employed and it accounts for 8% of all 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 2001 and 2010 this sector grew by 2.3 percent Regionally. However, from 2010 to 2013 this sector has seen a 7.5 percent decrease in employment. From 2001 to 2013, this sector has decreased employment by 590 persons and now makes up 4.7 percent of the Regions employment with 10,428 persons employed.

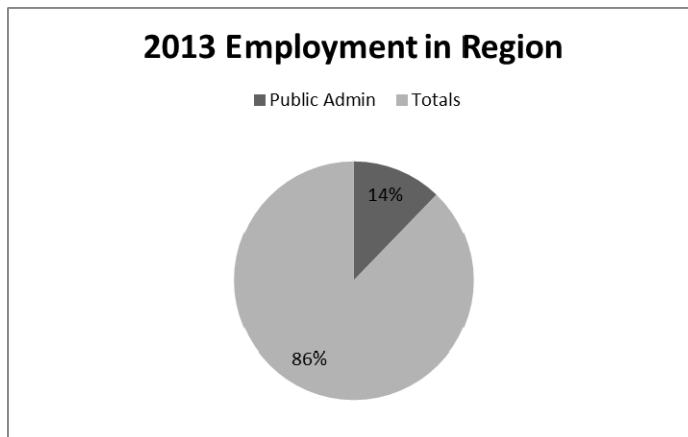


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Public Administration:

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.

Between 2001 and 2010 this sector saw a 2.3 percent growth. However, from

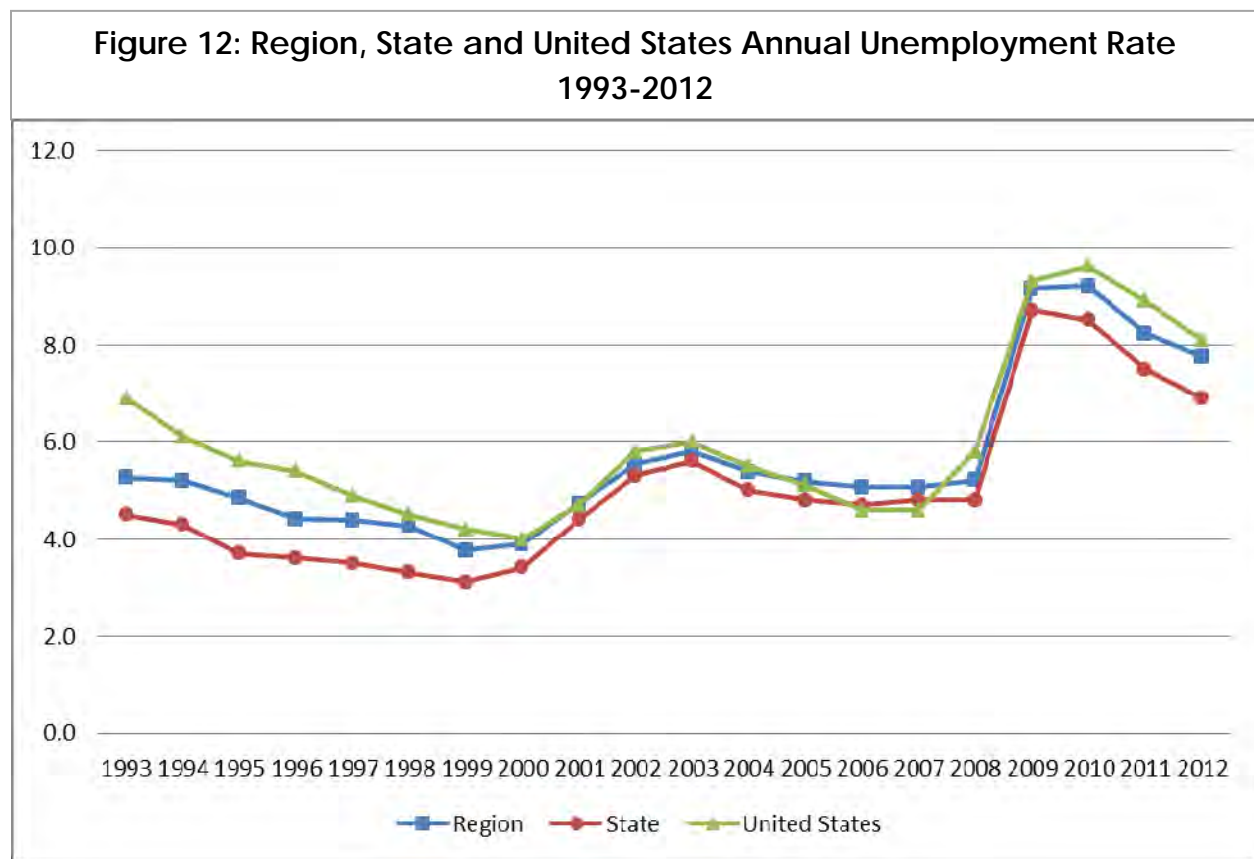


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2010 to 2013 this sector saw a 4.8 percent decrease in employment. After an increase of 710 persons between 2001 and 2010, the sector experienced a decrease of 1538 persons between 2010 and 2013 resulting in a total of 30,651 persons employed in the sector. This sector accounts for 14 percent of Regional employment.

Unemployment

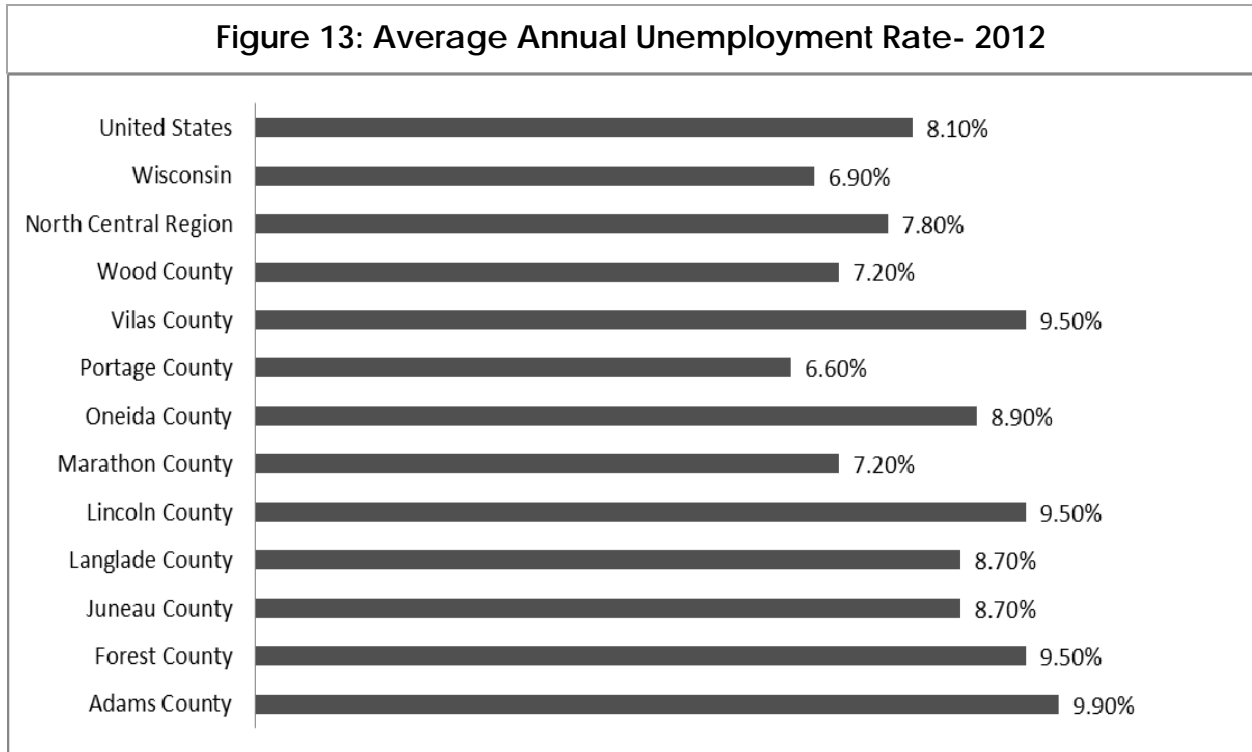
The Regional unemployment rate has increased over the past 22 years. (See Appendix B, table 17) Since 1993, the Regional unemployment rate has mirrored the state and national unemployment rates hitting their lowest point in 2000 and their highest point in 2010. The Regions unemployment rate has historically fallen below the national rate and above the state rate. This trend held true in 2012 as the Regions unemployment rate of 7.8 percent was below the national rate of 8.1 percent and above the state rate of 6.9 percent.



Wisconsin Department of Workforce Development, Local Area Unemployment Statistics

Marathon, Portage and Wood counties, who make up the central sub Region, experienced the lowest unemployment in the Region. (See Appendix B, table 18) These are the three largest counties and the most economically diverse. Three of the five counties that make up the north sub Region have unemployment rates of 9.5 percent and none of the northern counties have unemployment rates below 8.7 percent. Adams County in the south sub Region has the Regions highest unemployment rate of 9.9 percent. Only Portage County has a lower rate than the state and only the counties in the central sub Region have lower rates than the national rate. After a spike in unemployment between 2009 and 2010, our Region has experienced a steady decline in unemployment over the past two years.

Figure 13: Average Annual Unemployment Rate- 2012



Wisconsin Department of Workforce Development, Local Area Unemployment Statistics

Future Conditions

Employment Projections (NAICS 2 Digit)

The Wisconsin Department of Workforce Development office of economic advisors prepared employment projections by sector for the north central Region. These projections can be seen in table 2. The employment projections show a 7.34 percent increase in employment for the entire Region. These projections only look at job growth in the industry and do not calculate the future need to replace workers leaving the industry. Looking at the growth by sector it appears that health care will continue to be a growing sector in the Regional economy and manufacturing will continue to decline in the Region. Despite the projected decline in the manufacturing sector it is still a crucial sector in the Regional economy and a top employer for the Region. Although

NAICS Code	Description	2013 Jobs	2023 Jobs	Change 2013-2023	% Change 2013-2023
11	Agriculture, Forestry, Fishing and Hunting	9,077	8,470	(607)	-6.69%
21	Mining, Quarrying, and Oil and Gas Extraction	110	75	(35)	-31.82%
22	Utilities	597	433	(164)	-27.47%
23	Construction	9,507	10,223	716	7.53%
31	Manufacturing	32,910	32,469	(441)	-1.34%
42	Wholesale Trade	7,779	9,126	1,347	17.32%
44	Retail Trade	26,842	27,714	872	3.25%
48	Transportation and Warehousing	10,909	13,129	2,220	20.35%
51	Information	2,305	2,408	103	4.47%
52	Finance and Insurance	12,088	13,728	1,640	13.57%
53	Real Estate and Rental and Leasing	1,508	1,475	(33)	-2.19%
54	Professional, Scientific, and Technical Services	5,072	5,921	849	16.74%
55	Management of Companies and Enterprises	1,997	2,259	262	13.12%
56	Administrative and Support and Waste Management and Remediation Services	4,754	5,430	676	14.22%
61	Educational Services (Private)	1,223	1,485	262	21.42%
62	Health Care and Social Assistance	32,664	38,347	5,683	17.40%
71	Arts, Entertainment, and Recreation	2,516	2,714	198	7.87%
72	Accommodation and Food Services	17,377	19,491	2,114	12.17%
81	Other Services (except Public Administration)	10,428	10,853	425	4.08%
90	Government	30,651	30,726	75	0.24%
	Total	220,317	236,478	16,161	7.34%

Wisconsin Department of Workforce Development, Bureau of Workforce Information

projections show a decline in jobs, there will be a significant need to replace retiring workers in the manufacturing field resulting in hundreds of open positions. Overall, all but five industries are projected to grow over the next ten years. Health care, transportation and food services expect to add the most jobs while education services, transportation and health expect to grow at the highest rate. The Region is projected to add 16,161 total jobs over the next ten years.

Location Quotient Analysis

The location quotient (LQ) analysis compares local, state and national employment levels by sector. The result of this analysis is a number called a location quotient. If that number is greater than 1.00, it is determined to be an exporting sector, while if it is below 1.00, it is determined to be an importing sector. Exports bring money from outside the Region into the local economy and imports represent local dollars flowing outside the Region. It is crucial to identify sectors with high LQs because these sectors are drivers of the local economy.

Table 3 shows the top 5 Location Quotients in each county throughout the Region. The results show that counties in the Region are strong in Manufacturing, Retail Trade and Agriculture, Forestry and Fishing. The table also shows that wood products manufacturing, forestry and logging and crop production are employment sub sectors that have a high location quotient. In addition, the Region shows a high LQ in transportation, both rail and truck, and insurance.

Table 3: Top Five Location Quotients by County Compared to Nation									
Adams County				LQ	Forest County				LQ
NAICS	111	Crop Production		31.6	NAICS	113	Forestry and Logging		69.19
NAICS	322	Paper Manufacturing		16.17	NAICS	321	Wood Product Manufacturing		17.43
NAICS	721	Accommodation		10.07	NAICS	903	Gasoline Stations		3.05
NAICS	113	Forestry and Logging		8.31	NAICS	484	Truck Transportation		2.99
NAICS	112	Animal Production		4.67	NAICS	482	Rail Transportation		2.6
Juneau County				LQ	Langlade County				LQ
NAICS	332	Fabricated Metal Production mfg.		11.21	NAICS	113	Forestry and Logging		13.56
NAICS	112	Animal Production		5.89	NAICS	321	Wood Product Manufacturing		13.5
NAICS	447	Gasoline Stations		5.14	NAICS	111	Crop Production		13.3
NAICS	111	Crop Production		5.1	NAICS	112	Animal Production		8.34
NAICS	321	Wood Product Manufacturing		3.76	NAICS	333	Machinery Manufacturing		6.11
Lincoln County				LQ	Marathon County				LQ
NAICS	316	Leather and Allied Product mfg.		84.01	NAICS	321	Wood Product Manufacturing		11.21
NAICS	321	Wood Product Manufacturing		17.72	NAICS	322	Paper Manufacturing		9.1
NAICS	113	Forestry and Logging		16.34	NAICS	112	Animal Production		7.26
NAICS	322	Paper Manufacturing		11.6	NAICS	454	Nonstore Retailers		5.67
NAICS	332	Insurance Carriers and Related Activities		6.78	NAICS	333	Machinery Manufacturing		5.33
Oneida County				LQ	Portage County				LQ
NAICS	322	Paper Manufacturing		10.87	NAICS	111	Crop Production		8.63
NAICS	454	Nonstore Retailers		8.31	NAICS	454	Nonstore Retailers		6.98
NAICS	113	Forestry and Logging		5.44	NAICS	322	Paper Manufacturing		5.69
NAICS	111	Crop Production		3.94	NAICS	524	Insurance Carriers and Related Activities		5.62
NAICS	323	Printing and Related Support Activities		3.04	NAICS	533	Lessors of Nonfinancial Intangible Assets		4.56
Vilas County				LQ	Wood County				LQ
NAICS	721	Accommodation		6.11	NAICS	322	Paper Manufacturing		19.24
NAICS	321	Wood Product Manufacturing		5.49	NAICS	316	Leather and Allied Product mfg.		10.3
NAICS	113	Forestry and Logging		4.74	NAICS	484	Truck Transportation		7.23
NAICS	712	Museums, Historical Sites and Similar Activities		3.8	NAICS	321	Wood Product Manufacturing		5.8
NAICS	237	Heavy and Civil Engineering Construction		3.09	NAICS	621	Ambulatory Health Care Services		4.18

Wisconsin Department of Workforce Development, Bureau of Workforce Information

Table 4 shows all exporting sub-sectors on a Regional level. The Regional location quotients indicate that the Region is proficient in the Manufacturing, Retail Trade, Agriculture, Forestry and Fishing sectors, Transportation, Health Care, and Insurance industries.

Table 4: Regional Location Quotients Greater than One

	Sub Sector		LQ
NAICS	322	Paper Manufacturing	9.84
NAICS	316	Leather and Allied Product Manufacturing	7.68
NAICS	321	Wood Product Manufacturing	7.52
NAICS	113	Forestry and Logging	4.77
NAICS	454	Nonstore Retailers	4.68
NAICS	111	Crop Production	4.66
NAICS	112	Animal Production	4.05
NAICS	484	Truck Transportation	3.23
NAICS	332	Fabricated Metal Product Manufacturing	3.07
NAICS	333	Machinery Manufacturing	3.06
NAICS	524	Insurance Carriers and Related Activities	2.21
NAICS	327	Nonmetallic Mineral Product Manufacturing	2.13
NAICS	311	Food Manufacturing	1.81
NAICS	447	Gasoline Stations	1.70
NAICS	323	Printing and Related Support Activities	1.61
NAICS	485	Transit and Ground Passenger Transportation	1.49
NAICS	621	Ambulatory Health Care Services	1.46
NAICS	444	Building Material and Garden Equipment and Supplies Dealers	1.36
NAICS	337	Furniture and Related Product Manufacturing	1.33
NAICS	424	Merchant Wholesalers, Nondurable Goods	1.32
NAICS	721	Accommodation	1.29
NAICS	813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1.28
NAICS	331	Primary Metal Manufacturing	1.24
NAICS	452	General Merchandise Stores	1.22
NAICS	622	Hospitals (Private)	1.22
NAICS	441	Motor Vehicle and Parts Dealers	1.22
NAICS	482	Rail Transportation	1.21
NAICS	903	Local Government	1.16
NAICS	623	Nursing and Residential Care Facilities	1.13
NAICS	236	Construction of Buildings	1.03
NAICS	811	Repair and Maintenance	1.00
NAICS	339	Miscellaneous Manufacturing	1.00
NAICS	453	Miscellaneous Store Retailers	1.00

Wisconsin Department of Workforce Development, Bureau of Workforce Information

Wood manufacturing and Forestry and Logging are two of the sub-sectors with the highest location quotient score. This sub-sector was identified as a critical sector to the Regional economy. Discussions with manufacturers in Langlade County lead to the concept of a Wood Technology Center of Excellence. Northcentral Technical College took that concept and collaborated with North Central Wisconsin Regional Planning Commission, Langlade County, the City of Antigo, local K-12 schools and local wood manufacturers to develop a project that was worthy of an EDA grant.

The Wood Technology Center of Excellence received an EDA grant for construction in 2010 and opened in 2011. It is a 27,000 square foot facility is dedicated to training students enrolled in the Wood Processes Associate Degree, Wood Manufacturing Technical Diploma and Basic Wood Manufacturing Certificate programs on state-of-the-art machinery for designing and fabricating wood products.

Employment by Sub Sector (NAICS 3 Digit)

Roughly 65 percent of the industries project an increase in jobs over the next 10 years. Based on location quotients for 2013 (See Appendix B table 19), it is evident that the North Central Region is most specialized in natural resources and manufacturing, with general clusters in the following:

- Agriculture, Forestry, Fishing and Hunting Cluster (NAICS 11)
- Food, Beverage and Textile Cluster (NAICS 31)
- Wood, Paper, Printing and Plastics Cluster (NAICS 32)
- Machinery, Equipment and Metal Product Cluster (NAICS 33)
- General Merchandise Stores and Non-store Retailers Cluster (NAICS 45)
- Transportation and Warehouse Cluster (NAICS 48)
- Finance and Insurance Cluster (NAICS 52)
- Health Care and Social Assistance Cluster (NAICS 62)

Agriculture, Forestry, Fishing and Hunting Cluster

The agriculture, forestry, fishing and hunting cluster currently employs 4.0 percent of the Region's workforce. Between 2013 and 2023, the industry, as a whole, is expected to lose 607 jobs, or 6.7 percent of its employment. (See Appendix B, table 18) Crop production will see a 6.7 percent decrease, animal production will see a 2.2 percent decrease, and forestry will see a 29.8 percent decrease over the same time period. See Appendix B table 17 for a more detailed employment data.

Food, Beverage and Textile Cluster

The food, beverage and textile cluster currently employs 2.0 percent of the Region's workforce. Between 2013 and 2023, the industry, as a whole, is expected to lose 868 jobs, or 18.4 percent of its employment. Textile product mills will see a 45.8 percent increase and beverage and tobacco product manufacturing will see a 22.2 percent increase in employment over the same

time period. Wood product and paper manufacturing will see a reduction in employment of 15 percent and 13.9 percent respectively.

Wood, Paper, Printing and Plastics Cluster

The wood, paper, printing and plastics cluster currently employs 5.8 percent of the Region's workforce. Between 2013 and 2023, the industry is expected to lose 1,258 jobs, or 9.8 percent of its employment. The largest projected decreases are in wood product and paper manufacturing. Wood product manufacturing will see a reduction of 595 jobs, 15% of its employment, and paper manufacturing will see a loss of 751 jobs, a 13.9 percent reduction in employment. Nonmetallic mineral product manufacturing will see a 16 percent increase in employment adding 188 jobs over the same 10 year time period.

Machinery, Equipment and Metal Product Cluster

The machinery, equipment and metal product cluster currently employs 7.0 percent of the Region's workforce. Between 2013 and 2023, the industry is expected to gain 1,090 jobs, or 7.0 percent of its employment. The largest projected increases are in machinery manufacturing. Machinery manufacturing will see a gain of 1,547 jobs, a 31% increase in employment. Transportation equipment manufacturing will see the biggest loss in employment, 339 jobs, a 32 percent reduction in employment.

General Merchandise Stores and Non-store Retailers Cluster

The general merchandise stores and non-store retailers cluster currently employs 5.3 percent of the Region's workforce. Between 2013 and 2023, the industry is expected to gain 614 jobs, or 5.2 percent of its employment. The largest projected increases are in general merchandise stores which will see a gain of 844 jobs, a 15% increase in employment. Non-store retailers will see the biggest loss in employment, 215 jobs, a 5.5 percent reduction in employment.

Transportation and Warehouse Cluster

The transportation and warehouse cluster is the strongest cluster in the Region with all areas showing job growth over the next 10 years. This cluster currently employs 4.3 percent of the Region's workforce. Between 2013 and 2023, the cluster is expected to gain 1,898 jobs, or 20 percent of its employment. The largest projected increase is in truck transportation with projected increases of 1,580 jobs, a 21 percent increase in employment. The second largest employer

in the cluster, transit and ground passenger transportation is projected to add 75 jobs over the same time period.

Finance and Insurance Cluster

The finance and insurance cluster currently employs 5.5 percent of the Region's workforce. Between 2013 and 2023, the industry is expected to gain 1,640 jobs, or 13.6 percent of its employment. The largest projected increases are in insurance carriers and related activities which will see a gain of 1,163 jobs, a 14.4% increase in employment. Credit intermediation and related activities will add 510 jobs over that same time period. Securities, commodity contracts, and other financial investments and related activities is the only area that will see a loss of jobs, decreasing employment 18.4 percent resulting in 47 lost jobs.

Health Care and Social Assistance Cluster

The health care and social assistance cluster will see significant growth in all occupations over the next 10 years. Currently this sector employs 14.8 percent of the Region's workforce. Between 2013 and 2023, the industry is expected to gain 5,683 jobs, or 17.4 percent of its employment. The largest projected increases are in ambulatory health care service which will see a gain of 2,619 jobs, a 17.8% increase in employment. Nursing and residential care facilities will see a healthy increase in employment, 1,541 jobs, a 28.8 percent growth in employment. With an aging population, this cluster will continue to show growth and will continue to be a significant employer in the Region.

Emerging Statewide Economic Industry Clusters

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.

The high standard of living and recreational amenities of the Region offer a competitive edge not found in larger communities. The Wisconsin Economic

Development Institute in Madison, WI has identified eight existing clusters and two emerging clusters for the State of Wisconsin.

Emerging Statewide Clusters

Computer and Data Processing Services, Information Technology

Electronic data processing, prepackaged software, computer integrated systems design, computer-programming services are all industries that could thrive in the Region. Such businesses could draw upon the local universities and technical colleges and offer environmental amenities sought by professionals in these types of occupations.

Medical Devices

The Medical Device Industry is a major feature of the State of Wisconsin and an important contributor to the economic health of the state. Wisconsin's medical devices sector includes an array of instruments, machines, and medical devices for the diagnosis, cure, treatment, or prevention of disease. This sector is closely connected with Wisconsin's emerging biotechnology, health-care delivery and health-care information sectors as well as the historically strong manufacturing sector.

Existing Statewide Clusters

Wind Energy

Wisconsin has more than 75 companies that work in the wind turbine supply chain. This is a growing industry where demand is currently outstripping supply. Wisconsin's decades of experience in precision manufacturing gives the state's manufacturers a competitive advantage in supplying the various 8,000 components that comprise a wind turbine. Since year 2000, utility-scale wind generation in Wisconsin has grown by over 124 percent.

Biotechnology

Wisconsin has become a prime destination for companies seeking research partners and venture capitalists seeking high-yield investments, due to the outstanding execution cost effectiveness of our companies. Professional, Scientific and technical services are expected to grow 16.74 percent in the next 10 years

Dairy

Dairy is the #1 agricultural industry in Wisconsin. The economic impact of dairy farming in Wisconsin is more than twice as large as the citrus industry's economic impact in the state of Florida. Wisconsin's dairy business generates nearly nine times as great an economic impact as Idaho's potato industry. Agriculture generates more economic activity in Wisconsin besides just farm products and value added products. It also generates economic activity like the business to business purchases such as veterinary services, fuel, fertilizer, feed, and farm equipment.

Printing

With high-paying jobs, several market-leading companies, significant private sector R&D, and a steady supply of skilled workers from technical and baccalaureate colleges, the Printing Cluster is well positioned to continue as a major driver of the Wisconsin economy. A Printing Cluster Council was inaugurated in 2002 to draft initiatives to support and stimulate growth in the production and distribution of graphic products. Ink-on-paper is still a major part of the printing industry, but it has expanded to encompass a wide variety of processes and services that disseminate information in a wide variety of formats. It has become a digitized business, a thoroughly knowledge-based industry.

Food Products and Processing

The food processing industry in Wisconsin is a diverse sector that includes dairy, meat, fruit and vegetable processing (the most common industries) and specialty food products like baked goods, beer and other beverages. Food processing giants such as Ore-Ida, Oscar Mayer, Kraft, Kikkoman Foods, Sargento, Ocean Spray Cranberries and Nabisco - to name a few - have chosen Wisconsin because of our state's business climate and quality of life.

Forest Product Industry Cluster

Almost all of the counties in the northern half of Wisconsin have forest product LQ's higher than 1.25. Consequently, the forest products industries in those areas fit the category of export industries, thus playing a major role in supporting economic vitality. The communities can be assumed to have a competitive advantage in forest products industries and there may be additional economic development opportunities because of that advantage.

Exporting

Exporting product outside of the United States is an area that should be expanded. You can evaluate the export potential for your products and services several ways. The most common approach is examining the success of your products domestically. If your company succeeds at selling in the U.S., there is a good chance that it also will succeed in foreign markets with similar needs and conditions.

Another method to assess your company's export potential is examining any unique or important product features. If your products are difficult to duplicate overseas, it is likely that they will succeed. A unique product may have little competition and demand might be quite high.

Finally, your product may have export potential even if sales are declining in the United States. Sizeable export markets may still exist, especially if the product did well in the U.S. but now is losing market share to more technically advanced products. Other countries may not need state-of-the-art technology and/or may not be able to afford the more sophisticated and expensive products. Some markets may show a surprisingly healthy demand for older products considered obsolete by U.S. standards.

Entering foreign markets requires commitment from management and a clear export strategy. Complete the Export Readiness Assessment. There are a variety of questions that need to be asked as a company examines exporting as a viable option. These include: Does your company have a product or service that has sold successfully in the domestic market? Does your company have or is your company preparing an international marketing plan with defined goals and strategies? Does your company have sufficient production capacity to commit to the export market? Does your company have the financial resources to actively support the marketing of your products to targeted overseas markets? Is your company's management committed to developing export markets and willing and able to dedicate staff, time and resources to the process? Does your company have adequate knowledge in modifying product packaging and ingredients to meet foreign import regulations and cultural preferences? Does your company have adequate knowledge of export payment mechanisms, such as developing and negotiating letters of credit? Does your company have adequate knowledge in shipping its product overseas, such as identifying and selecting international freight forwarders and freight costing? After deciding to export your products, develop an export plan.

A crucial first step in planning is to reach management consensus on the company's goals, objectives, capabilities and constraints. To develop an export plan, first assemble the facts, constraints and goals, then use the information to create an action statement. The action statement includes specific objectives. It presents a time schedule for implementation. It identifies milestones for measuring success. The export plan should successfully answer the following questions:

- Which products are selected for export development? What modifications, if any, must be made to adapt them for overseas markets?
- Which countries are targeted for sales development?
- What is the basic customer profile in each country? What marketing and distribution channels should be used to reach customers?
- What special challenges pertain to each market (competition, cultural differences, import controls, etc.), and what strategies will be used to address them?
- How will the product's export sale price be determined?
- What specific operational steps must be taken and when?
- What will be the time frame for implementing each element of the plan?
- What personnel and company resources will be dedicated to exporting?
- What will be the cost in time and money for each element?
- How will results be evaluated and used to modify the plan?

The first time an export plan is developed, it should be kept simple. It need be only a few pages long, since important market data and planning elements may not yet be available. The initial planning effort gradually generates more information and insight. As planners learn more about exporting and your company's competitive position, the export plan will become more detailed and complete.

From the start, the plan should be viewed and written as a management tool, not as a static document. Objectives in the plan should be compared with actual results to measure the success of different strategies. The company should not hesitate to modify the plan and make it more specific as new information and experiences are gained. A detailed plan is recommended for companies that intend to export directly. Companies choosing indirect export methods may require much simpler plans.

Many companies begin export activities haphazardly, without carefully screening markets or options for market entry. While these companies may or may not have a measure of success, they may overlook better export opportunities. If early export efforts are unsuccessful because of poor planning, your company may be misled into abandoning exporting altogether.

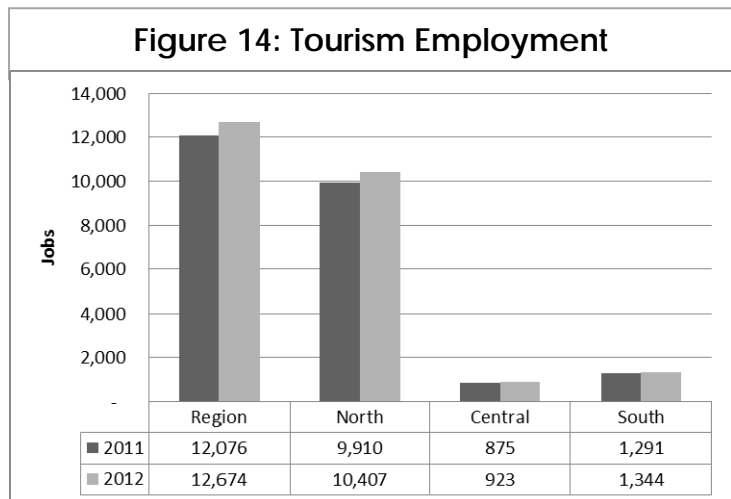
Formulating an export strategy based on good information and proper assessment increases the chances that the best options will be chosen, resources will be used effectively, and efforts will consequently be carried through to success.

Which markets hold the most promise for your products? Who are the major players and competitors in the market? Use market research reports and customized services to focus your efforts on the most promising markets. Identify potential buyers, agents, distributors or joint-venture partners for your product or service. Become familiar with the various partner matching and trade lead services offered by the federal government.

A variety of cost-effective services are available to help test the markets and gain exposure overseas. Trade Specialists can guide you through the complex web of international transactions. To learn more about exporting, refer to the Basic Guide to Exporting, at <http://www.export.gov/>.

Tourism

Tourism has a large impact on the Regional economy with nearly \$1.11 billion in direct visitor spending in 2012, up from 1.062 billion in 2011. (See Appendix B, table 20) The Region had a .5% growth in tourism expenditures while the state had and 1.36% increase in direct visitor spending. Marathon County has the highest visitor spending in the



Wisconsin Department of Tourism

Region (\$217 million) and Forest County has the least amount of visitor spending (\$11.5 million). Vilas County saw the greatest growth in visitor spending in the past year at 10.25 percent followed by Lincoln (8.58%) and Juneau (7.89%) Counties. Overall, all but Adams and Wood Counties saw an increase in visitor spending over the past year. Roughly 44 percent of all tourism in the Region takes place in the North sub Region and the North Region saw the greatest growth in visitor spending. The North was also the only sub Region to outperform the state’s one year growth in visitor spending and

employment. Overall, the Region was below the State's growth in both visitor spending and employment.

According to the US Travel Association for every \$1 million in traveler spending, 12 jobs are created in Wisconsin. This means that Regional tourism expenditures of \$1.11 billion in 2012 helped create 13,320 jobs in North Central Wisconsin. Although tourism related projects aren't 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/scenic beauty, lakes, recreation vehicles/ snowmobiles, 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.

Creative Industry

According to a United Nations Creativity Report from 2008, "Creative industries" can be defined as the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs." The creative industries account for 3.4 percent of total world trade, with exports reaching \$424.4 billion in 2005 and an average annual growth rate of 8.7 percent during 2000-2005. In the North Central Region, 911 businesses are considered creative making up 2.61 percent of the businesses in the Region employing 2,680 persons. (See Appendix B, table 21) Portage (3.43%) and Vilas (3.25%) Counties have the highest percentage of creative businesses and Marathon County has the highest number of creative businesses (280). According to the United Kingdom's Department of Cultural, Media and Sport (UKDCMS) the following industries make up the creative industry: Advertising, Architecture, Art and antiques market, Crafts, Design, Fashion, Film and video Music Performing arts, Publishing, Software, Television and radio, Video and computer games. A majority of this industry is captured in NAICS 71: Arts and Entertainment and is projected to grow 7.87 percent over the next ten years in the North Central Region.

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 industry attracts young entrepreneurs who enjoy creating new ideas and products which create new business opportunities. This type of environment encourages innovation and growth and creates new jobs for the Region and a base of economic development for future generations. As the Region and nation transitions from an industrial based economy to a consumer based economy, the need for a creative workforce and the creative industry is vital for economic growth.

"People with ideas—people who own ideas—have become more powerful than people that work machines and, in many cases, more powerful than the people who own machines. Yet the relationship between creativity and economics remains almost invisible (pp. viii-ix)." John Howkins- The Creative Economy

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.

Chapter 3: Transportation & Utilities

Transportation

Road Network

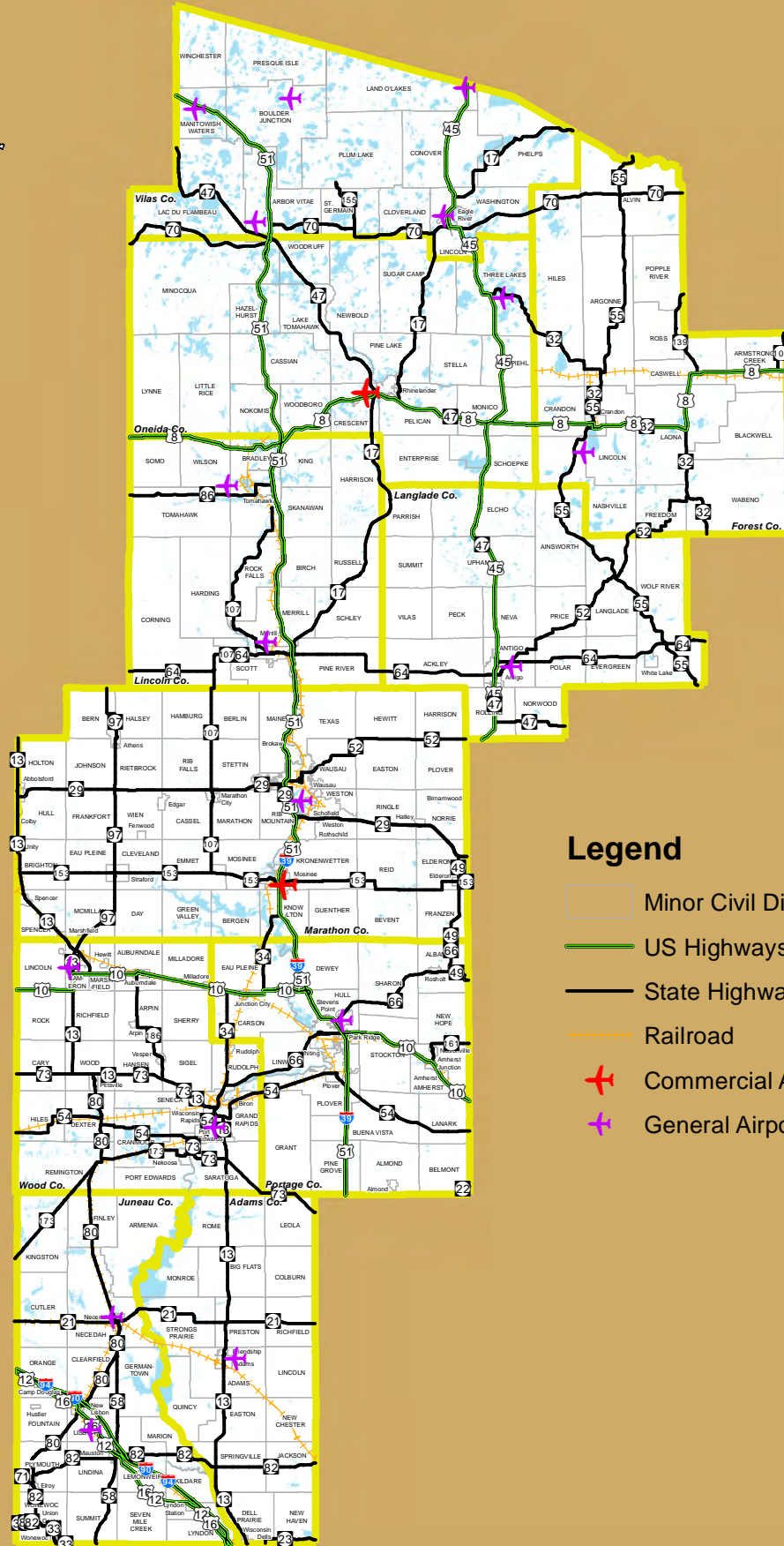
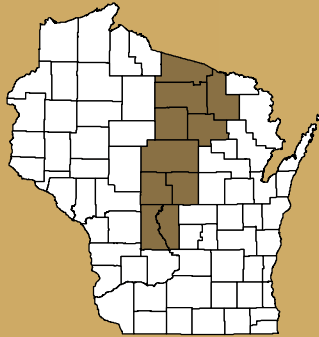
The Regional surface transportation network is comprised of federal, state, county and local roadways. The inventory covers over 18,500 miles of road, including 445 miles of Interstate and U.S. highways, 1,211 miles of state highways, 2,843 miles of county highways and 13,036 miles of local streets and roads. There is also nearly 1,000 miles of miscellaneous other 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 2.

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.

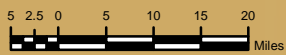
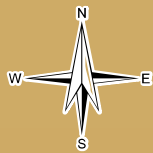
Other major East-West connections include USH 10 through Portage and Wood Counties, which connects Stevens Point and Marshfield, and USH 8 through Forest, Oneida and Lincoln Counties, connecting the City of Rhinelander and other Northwoods communities to the Twin Cities. Currently, USH 8 is a two-lane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



Legend

-  Minor Civil Divisions
-  US Highways
-  State Highways
-  Railroad
-  Commercial Airports
-  General Airports



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.

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.

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 and shared-ride taxi services. The cities of Merrill, Stevens Point and Wausau operate fixed-route bus systems including a paratransit component. 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 to Mosinee, Marshfield, Mauston, Stevens Point, Wausau, and Weston. Service is provided by Greyhound and Lamers Bus Lines. Connections can be made to Minneapolis, Chicago and points nationwide.

Airports

Airports are critical to economic development. There are 19 public use airports located in the Region, including two commercial airports. Commercial airports are located in Mosinee and Rhinelander and are critical for the continued growth for the Region. Both commercial airports have over 43,000 aviation operations annually. See Map 2.

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 2.

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.

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:

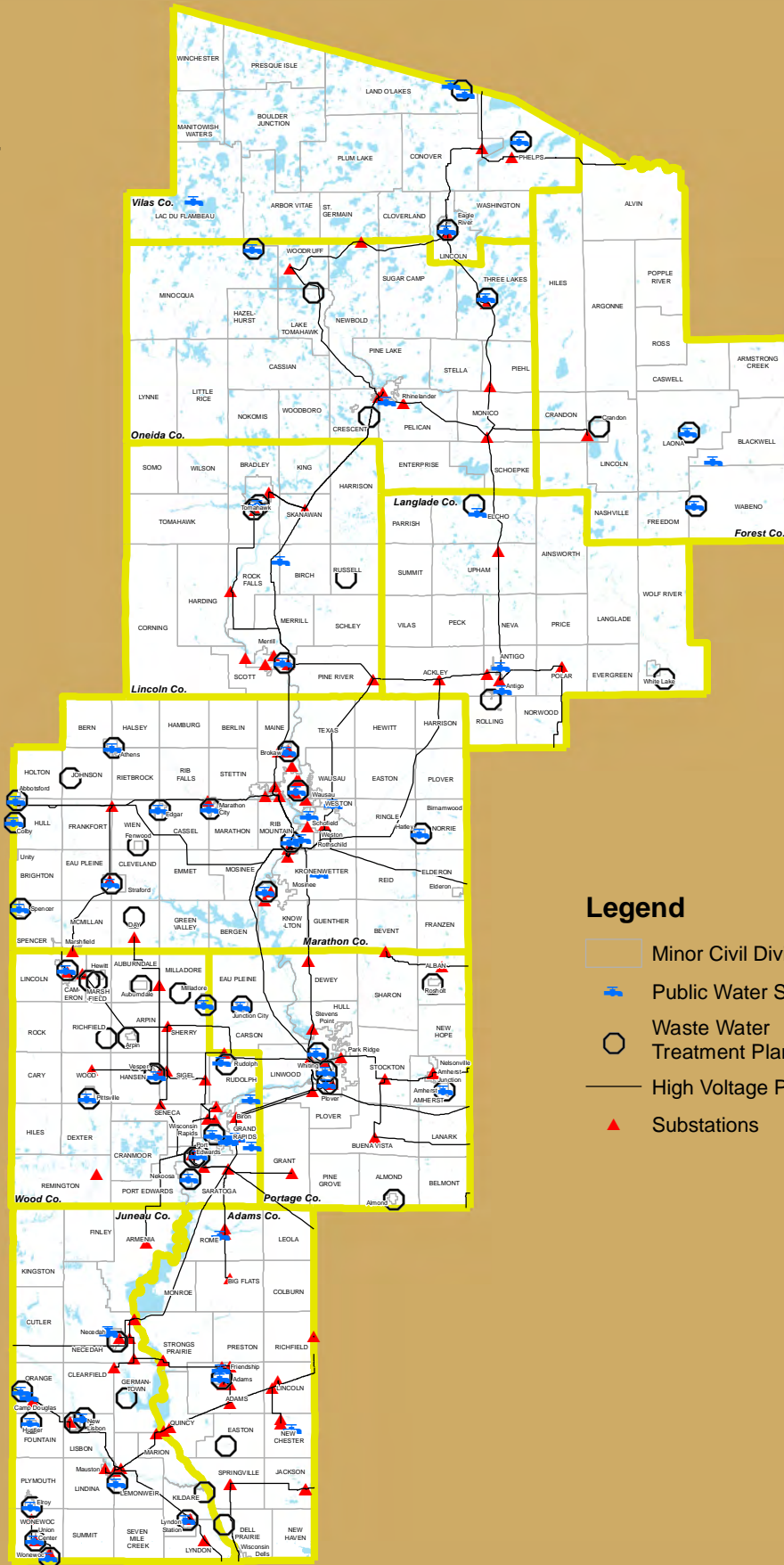
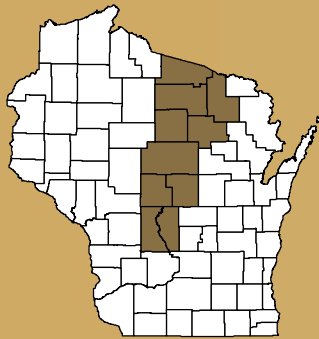
The need for access to reliable rail service has been identified by local leaders and businesses in parts of our Region. The decline of rail service in northern Wisconsin has had a negative impact on manufacturers and loggers in the Region. North Central Wisconsin Regional Planning Commission assisted local leaders throughout northern Wisconsin and they formed the Northwoods Rail Commission in 2012. The recently formed commission consists of Ashland, Forest, Florence, Iron, Langlade, Lincoln, Marathon, Marinette, Oconto, Oneida, Price, Rusk, and Vilas counties. In addition to those counties several other counties have expressed interest, including some located in 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

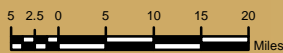
Water and wastewater are among the most basic and fundamental municipal services. There are 59 municipal water systems in the Region, including ten systems that did not exist in 1978. Just over half of these systems are located in the more urbanized area of the central sub-Region. Ten systems are located in Juneau County, and 16 are located in the five northern counties. See Map 3.

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 located in the three central counties. It would be expected that a high percentage of these facilities would be located in the most urbanized areas.



Legend

-  Minor Civil Divisions
-  Public Water Supply
-  Waste Water Treatment Plant
-  High Voltage Powerline
-  Substations



Energy Facilities

The energy system within North Central Wisconsin is a combination of the Weston power plant and several hydroelectric dams. Power is distributed via a system of high voltage power lines. See Map 3.

The Weston Power Plant site includes four separate plants that generate 525-megawatts of electricity for WPS. Wisconsin Energies (WE Energies) recently completed construction of a biomass-fueled cogeneration power plant in Rothschild. The facility is collocated with a paper mill. This new plant is expected 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.

Telecommunications:

Telecommunications infrastructure is critical in the new global economy. Generally cell service has improved in the region, but the major concern is access 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 particular 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 3.

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 LinkWISCONSIN which is a statewide initiative, sponsored by the Public Service Commission of Wisconsin (PSCW), to promote the availability and sustainable adoption of broadband internet access. The goal is to bring Regional leadership together around a strategy to promote both the availability and use 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.

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 5 provides a summary of each business and industrial park in the Region, according to size, services, and acres available in these parks. See Map 4.

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 5: 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	HWY 13
	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 Analysis

Integration with State, Regional & Local Efforts

The Commission 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. Adams County was not included in the original OEDP or EDD designation, but was later added in 1993. The OEDP was renamed the Comprehensive Economic Development Strategy (CEDS) in 2000.

The Framework Regional Development, 1981

The North Central Wisconsin Regional Planning Commission's first "Regional comprehensive plan" was prepared in 1981. This plan identified seven overall goals, numerous policies and several actions. The most important goal that relates to economic development is: Promotion of orderly growth, diversification, and development of the Region's economy.

The Framework also went on to identify four Regional issues that are still pertinent today. These are: Employment Opportunities, Industrial Expansion and Diversification, Decline of Downtown Commercial Areas, and Enhancement of Natural Resource-Based Economic Activity/Tourism.

Regional Comprehensive Plan, 2003

The Regional Comprehensive Plan (RCP) was designed as an advisory document providing "long-range policy direction for making public and private investment decisions." The RCP covered nine major areas, including economic development.

A variety of items were reviewed in the economic development section, including a review of the Regional economy, identification of emerging economic sectors, a detailed strengths, weaknesses, opportunities and threats, and a goal, objectives and recommendations. The goal states "Promote the expansion or stabilization of the current economic base and the creation of a range of employment opportunities at the state, Regional and local levels.

The Regional Comprehensive Plan is currently being updated as part of the Regional Livability Plan (RLP). The RLP will update the Regional Comprehensive Plan and include a chapter focused on livability in the Region including goals for housing, economic development, transportation, and land use.

SWOT Analysis, 2013

The Region has several economic strengths and some areas of weaknesses for attracting companies and or creating new firms. Through the CEDS process the economic strengths, weaknesses, opportunities and threats to the Region were identified.

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Strong Manufacturing Base • Access to quality Interstates • Access to Regional airport • Regional economic development effort and communication • Innovative population • Tourism • Knowledgeable and hardworking workforce • Competitive wages for businesses • Lower Cost of Living • Quality education system • 2 year and 4 year college programs • Access to natural resources • Quality freshwater resources • Quality of life/place • Quality healthcare options • Wealth of recreational activities • Low state taxes for businesses 	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Industry specific 2 year training programs • Innovative workforce • Creative new uses for existing infrastructure i.e. paper mills • Emerging healthcare sector • Better use of the Regional airport • Access to Federal Lands timber • Specialized manufacturing clusters • Access to freshwater • Natural resources and environment • Entrepreneurial support • Increasing number of incubators and seed accelerators • Increase Regional collaboration • Capitalization of educated, active retiree population
<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Lack of access to broadband • Roads limits for heavy transportation • Unprepared future workforce • Lack of skilled labor for specialties • Lack of knowledge of manufacturing careers • Location to major markets • Limited freight rail access in North • High dependence on traditional manufacturing industries • Waste disposal/ solid waste issues • Declining young population • Aquatic/ natural and terrestrial invasive species • Lack of national forest access for timber cutting • Lower wages for workers • Availability of diverse affordable housing options 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Slow population growth • Shrinking workforce • Unprepared workforce • Low wages result in low quality workers • Aging population • Manufacturing dependency • Paper manufacturing dependency • Lack of diversity in industries • Shortage of older woods supply • Shrinking manufacturing workforce • Aquatic and terrestrial invasive species • Lack of creative industry clusters • Decreasing population under 17 years of age • Aging/ retiring workforce • Growing healthcare costs

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.

3. Rural Business Enterprise Grants (RBEG) Program – available to public bodies, private nonprofit corporations, and Federally-recognized Indian Tribal groups to finance and facilitate development of small and emerging private business enterprises located in areas outside the boundary of a city or unincorporated areas of 50,000 or more and its immediately adjacent urbanized or urbanizing area.

4. Rural Business Opportunity Grant (RBOG) – promotes sustainable economic development in rural communities with exceptional needs. This is accomplished by making grants to pay costs of providing economic planning for rural communities, technical assistance for rural businesses, or training for rural entrepreneurs or economic development officials.

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) – Affordable 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.

Impact Loan Program: Forgivable loans to businesses with expansion projects providing job creation or retention; capital investment; and significant impact.

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 is able to 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.

Enterprise Zone Program: The State of Wisconsin provides tax incentives to new or expanding businesses whose projects will affect distressed areas. The zone is "site specific" and applies to only one business. Projects must affect distressed areas suffering from high unemployment, low incomes, declining population, declining property values, and plant closings and that have high numbers of people on public assistance. Businesses earn credits only by creating new full-time jobs or by conducting environmental remediation on a "Brownfield" site. The Region currently has four designated enterprise zones and all are located in the central sub-Region. They are: *Renaissance Learning* in Wisconsin Rapids; *Award Flooring*, and *Marathon Electric* in Wausau; and *Lands' End* in Stevens Point.

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.

ExporTech: Export acceleration program to help Wisconsin companies expand their global market reach through targeted export strategy development and execution.

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, child care 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) 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). The Wisconsin Business Development Finance Corporation provides financial assistance and resources to business and lenders throughout the state (Source: 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. 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 Rural & Industrial Commission, 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.

Financial assistance available at the county & municipal level includes revolving loan funds, tax incremental financing, among others. Contact your local development corporation for more information.

Chapter 6: Regional Strategy

The following goals and objectives set forth the Regional Strategy for North Central Wisconsin. There is also a discussion of the various performance indicators that will be used to gauge progress toward the strategy. 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.

Goals and Objectives:

Goal I: 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 II: 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 III: 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.

Goal IV: 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 key, viable businesses and institutions in the downtown districts of our communities.
4. Maintain and enhance infrastructure and public facilities throughout the Region.

Goal V: 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. Increase the number of associates and 4-year degrees in the Region.
4. Develop entrepreneurial training and education at area high schools, technical colleges, and universities.
5. Work with businesses, K-12 Schools, Higher Education Schools and Workforce Development to determine and develop skill sets.
6. Enhance business-specific leadership skills in young professionals
7. Develop a plan to retain and attract a young workforce.
8. Develop a mentor program for older workers to work with new workforce.
9. Develop a training program for retiring workforce to help develop a "second career".

Goal VI: Meet the full range of business' infrastructure needs with emphasis on transportation, utilities and communications.

Objectives:

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

Goal VII: Promote and Increase communication between Regional and county economic development, workforce development and other organizations.

Objectives:

1. Collaborate with local, county, economic development organization, surrounding regional planning commissions, state and federal agencies, as well as private business on economic development goals, objective and activities.
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 partnerships to promote economic development for North Central Wisconsin.

Performance Indicators

In an effort to monitor change over time, these fifteen indicators have been established. Much of this information is contained in the CEDS.

Total regional employment
Regional employment per sector
Regional unemployment
Total Regional business establishments
Regional Location Quotient changes
Annual total passengers and freight at CWA and R-OC Airport
Broadband access and reliability (area change)
Regional Education levels for high school, associates, and bachelor's degrees
Population by age cohorts in the Region
Number of incubators in Region (Number of graduates)
Number of Brownfield Redevelopment projects in the Region
Acreage available for industrial/businesses development
Regional Per Capita Income
Regional Median Household Income
Number of grant applications funded from EDA, Federal and State programs

NCWRPC Action Plan

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

Figure 15 NCWRPC Strategy Action Plan	
Goal I. Encourage business retention and expansion to maintain and increase employment opportunities in the Region.	
Task	Timeframe
Complete Comprehensive Economic Development Strategy for Commission and annual updates.	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
Prepare and maintain County Profiles.	Annually
Manage the North Central Wisconsin Development Corporation. Monitor all existing loans and complete all paperwork for the loan fund.	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 entities.	Ongoing
Promote the retention and expansion of existing businesses.	Ongoing
Encourage and assist start-up of firms in the Region.	Ongoing
Goal II. Create an innovative atmosphere to foster an entrepreneurially supportive environment.	
Task	Timeframe
Research creative industries and find funding to complete a creative industry/ entrepreneur study.	2014

Research “place-making” as part of a Quality of Place effort.	2014
Research and recommended locations for new incubators.	Ongoing
Pursue additional venture capital to the Region’s businesses.	Ongoing
Goal III: Promote and attract new business to the Region.	
Task	Timeframe
Research and identify new business grant opportunities with DOA, WEDC, WHEDA, USDA, and EDA.	Ongoing
Support Region in the recruitment of new businesses.	Ongoing
Research and identify emerging clusters in the Region and state.	Ongoing
Collaborate and partner with WEDC to attract new firms to the Region.	Ongoing
Goal IV: Encourage the reuse of existing commercial and industrial sites for more sustainable economic development.	
Task	Timeframe
Research and include information on place making in housing and economic development sections of Regional Livability Plan (RLP).	2014
Maintain inventory and map of brownfields in the Region.	Ongoing
Maintain inventory and map of business (industrial and commercial) acreage in the Region.	Ongoing
Prepare Brownfield grant applications to assist member communities as requested.	Ongoing

Maintain inventory of all industrial and business parks, current and future, in the Region	Ongoing
Work with organizations to get properties and sites listed on "Locate In Wisconsin" website.	Ongoing
Prepare grants from state agencies for the Region, such as DOA, WEDC, WHEDA, among others.	Ongoing
Pursue grant opportunities from federal agencies, such as EDA, EPA and USDA.	Ongoing
Goal V: Ensure the future availability of a skilled and flexible workforce prepared to meet the needs of both existing and emerging industries and technologies.	
Task	Timeframe
Support the efforts of and collaborate with the North Central Wisconsin Workforce Development Board, Technical Colleges, 4-year Colleges and Universities.	Ongoing
Determine 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
Working with NCWWDB identify grant opportunities to create a plan to attract and retain young professionals in the Region.	2014
Goal VI: Meet the full range of business' infrastructure needs with emphasis on transportation, utilities and communications.	
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 telecommunications 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
Goal VII: Promote and Increase communication between Regional and county economic development, workforce development and other organizations.	
Task	Timeframe
Attend county economic development corporation meetings at least once a year.	Ongoing
Attend occasional regional economic group meetings.	Ongoing
Attend meetings/conferneces with various state and federal agencies and organizations.	Ongoing
Attend EDA meetings/conference calls as required.	Ongoing

**APPENDIX A:
PROJECT LIST**

North Central Wisconsin Regional Planning Commission: Project Listing		
County	Community	Description
Adams County	Adams County	Establishment of Business Incubator
Forest County	City of Crandon	Expansion of Industrial Park
	Town of Laona	Creation of Industrial Park
	Town of Wabeno	Creation of Industrial Park
	Forest County	Complete a study of supply chain analysis for local business.
	Forest County	Development of Broadband Infrastructure
	Forest County	Development Business Incubator
	Forest County	Development of a Motorized Recreation Area
Juneau County	City of Elroy	Sewer and Water Extension
	City of Elroy	Development of Industrial Park
	City of Mauston	Wastewater Treatment Expansion
	City of Mauston	East Reservoir & Connection Main
	City of New Lisbon	Expansion of Industrial Park
	Village of Necedah	Water & Sewer Improvements to County Incubator Facility
	Village of Necedah	Industrial Park Expansion
	Town of Lemonweir	Development of Woodside Sports Complex
	Town of Lyndon Station	Upgrade Industrial Park
	Juneau County	Continued Development of the Juneau County Inventors & Entrepreneurs Club
	Juneau County	Assistance for the existing incubator facilities in the county
Langlade County	City of Antigo	5th Avenue Reconstruction
	City of Antigo	Industrial Park Expansion
	City of Antigo	Field Street Reconstruction
	City of Antigo	Reconstruction of North Edison Street
	Village of White Lake	Industrial Park Expansion, including sewer & water extensions
Lincoln County	City of Merrill	Development of Highway 51 Corridor Business Parks
	City of Merrill/Tomahawk	New Business Incubator
	City of Tomahawk	Development of New Industrial Park
Marathon County	City of Mosinee	Expansion of Industrial Park
		Sewer and Water Extension
	Village of Edgar	Development of New Industrial Park
	Village of Spencer	Development of Industrial Park Infrastructure
Oneida County	City of Rhinelander	Water Tower in Industrial Park
	City of Rhinelander	Extended Infrastructure in Industrial Areas
	Town of Minocqua	Develop Business Park Area
	Oneida County	Development of New Industrial Park
	Oneida County	New Business Incubator
	Oneida County	Development of Broadband Infrastructure
Portage County	Rosholt	Develop an Industrial Park
	Rosholt	Establish a Village Water System
Vilas County	City of Eagle River	Development of New Industrial Park
	City of Eagle River	Infrastructure Extension
	Town of Lac Du Flambeau	Development of New Industrial Park
	Vilas County	Fiscal Impact Study of Broadband throughout Vilas County
	Vilas County	Deployment of a business enterprise class internet system
	Vilas County	Development of a Business Incubator
Wood	City of Wisconsin Rapids	Water Treatment Facility Upgrade & Related Needs
	Village of Nekoosa	Expansion and Upgrade of Industrial Park
	Port Edwards	Port Edwards Papermill recommission

APPENDIX B

TABLES

Table 6: Population 1980-2010

County	Census 1980	Census 1990	Census 2000	Census 2010	% Change 1980-1990	% Change 1990-2000	% Change 2000-2010
Adams	13,457	15,682	19,920	20,875	16.5%	27.0%	4.8%
Forest	9,044	8,776	10,024	9,304	-3.0%	14.2%	-7.2%
Juneau	21,037	21,650	24,316	26,664	2.9%	12.3%	9.7%
Langlade	19,978	19,505	20,740	19,977	-2.4%	6.3%	-3.7%
Lincoln	26,555	26,993	29,641	28,743	1.6%	9.8%	-3.0%
Marathon	111,270	115,400	125,834	134,063	3.7%	9.0%	6.5%
Oneida	31,216	31,679	36,776	35,998	1.5%	16.1%	-2.1%
Portage	57,420	61,405	67,182	70,019	6.9%	9.4%	4.2%
Vilas	16,535	17,707	21,033	21,430	7.1%	18.8%	1.9%
Wood	72,799	73,605	75,555	74,749	1.1%	2.6%	-1.1%
Region	379,311	392,402	431,021	441,822	3.5%	9.8%	2.5%
North	103,328	104,660	118,214	115,452	1.3%	13.0%	-2.3%
Central	241,489	250,410	268,571	278,831	3.7%	7.3%	3.8%
South	34,494	37,332	44,236	47,539	8.2%	18.5%	7.5%
State	4,705,642	4,891,769	5,363,715	5,688,040	4.0%	9.6%	6.0%
United States	226,545,805	248,709,873	281,421,906	308,745,538	9.8%	13.2%	9.7%

US Census 1980,1990,2000,2010

Table 7: Seasonal Dwellings

County	1980	1990	2000	2010	% of units	1980-2010 % change	Total
Adams	3,644	5,949	5,637	6,725	38.90%	84.50%	3,081
Forest	2,792	3,576	3,856	4,430	49.60%	58.70%	1,638
Juneau	1,698	2,436	2,043	2,516	17.30%	48.20%	818
Langlade	2,115	2,594	2,158	2,643	21.50%	25.00%	528
Lincoln	2,721	2,521	1,949	2,866	17.20%	5.30%	145
Marathon	409	725	554	1,176	2.00%	187.50%	767
Oneida	8,987	11,263	10,429	11,067	36.70%	23.10%	2,080
Portage	479	685	557	637	2.10%	33.00%	158
Vilas	9,548	11,632	12,587	11,959	48.60%	25.30%	2,411
Wood	188	400	244	311	0.90%	65.40%	123
Region	32,581	41,781	40,014	44,330	18.00%	36.10%	11,749
State	110,928	150,601	142,313	186,036	7.10%	67.70%	75,108
North	26,163	31,586	30,979	32,965	35.60%	26.00%	6,802
Central	1,076	1,810	1,355	2,124	1.70%	97.40%	1,048
South	5,342	8,385	7,680	9,241	29.00%	73.00%	3,899

US Census 1980, 1990, 2000, 2010

Table 8: Population Projections

County	2000	2005	2010	2015	2020	2025	2030	2035	2000-2035 % Change
Adams	19,920	22,175	20,875	23,265	24,259	25,000	25,455	25,612	28.6%
Forest	10,024	10,326	9,304	10,420	10,463	10,433	10,323	10,135	1.1%
Juneau	24,316	27,513	26,664	28,449	29,348	30,066	30,551	30,806	26.7%
Langlade	20,740	21,862	19,977	22,401	22,903	23,281	23,498	23,521	13.4%
Lincoln	29,641	31,017	28,743	31,726	32,422	32,981	33,334	33,478	12.9%
Marathon	125,834	136,730	134,063	142,406	148,164	153,519	158,174	162,078	28.8%
Oneida	36,776	38,949	35,998	40,003	41,029	41,876	42,423	42,615	15.9%
Portage	67,182	71,501	70,019	73,792	76,100	78,195	79,952	81,390	21.1%
Vilas	21,033	22,953	21,430	23,829	24,645	25,295	25,720	25,894	23.1%
Wood	75,555	77,721	74,749	78,613	79,359	79,773	79,713	79,129	4.7%
REGION	431,021	460,747	441,822	474,904	488,692	500,419	509,143	514,658	19.4%
North	118,214	125,107	115,452	128,379	131,462	133,866	135,298	135,643	14.7%
Central	268,571	285,952	278,831	294,811	303,623	311,487	317,839	322,597	20.1%
South	44,236	49,688	47,539	51,714	53,607	55,066	56,006	56,418	27.5%
STATE	5,363,675	5,589,937	5,686,986	5,988,439	6,202,802	6,390,904	6,541,180	6,653,951	24.1%

U.S. Census, 2000, 2005, 2010; WI DOA

Table 9: Population Projection by Age 2010-2035

	Age Group	Pop 2010	Pop 2015	Pop 2020	Pop 2025	Pop 2030	Pop 2035	% Change 2010-2035
REGION	0-19	108,116	105,725	107,282	110,302	112,237	112,324	3.9%
	20-34	85,443	89,530	85,416	79,038	75,134	75,452	-11.7%
	35-44	55,642	52,986	58,863	64,940	63,225	57,665	3.6%
	45-59	106,727	105,217	96,459	87,795	90,551	97,087	-9.0%
	60-84	93,165	108,501	127,071	143,425	150,751	150,565	61.6%
	85 +	11,654	12,945	13,601	14,919	17,245	21,565	85.0%
NORTH	19 and under	25,877	24,662	24,807	25,382	25,768	25,664	-0.8%
	20-34	19,396	20,804	19,280	17,084	15,638	15,531	-19.9%
	35-44	14,316	13,203	14,846	17,014	16,243	14,045	-1.9%
	45-59	30,502	29,840	26,875	23,788	24,619	26,586	-12.8%
	60-84	31,426	35,867	41,405	45,922	47,731	47,399	50.8%
	85 +	3,590	4,003	4,249	4,676	5,299	6,418	78.8%
CENTRAL	19 and under	72,574	71,809	73,201	75,521	77,024	77,326	6.5%
	20-34	57,711	60,024	57,872	54,392	52,395	52,876	-8.4%
	35-44	35,348	34,025	37,805	41,132	40,392	37,726	6.7%
	45-59	63,500	62,538	57,715	53,388	55,058	59,032	-7.0%
	60-84	49,768	58,563	68,805	78,054	82,473	82,301	65.4%
	85 +	7,051	7,852	8,225	9,000	10,497	13,336	89.1%
SOUTH	19 and under	9,665	9,254	9,274	9,399	9,445	9,334	-3.4%
	20-34	8,336	8,702	8,264	7,562	7,101	7,045	-15.5%
	35-44	5,978	5,758	6,212	6,794	6,590	5,894	-1.4%
	45-59	12,725	12,839	11,869	10,619	10,874	11,469	-9.9%
	60-84	11,971	14,071	16,861	19,449	20,547	20,865	74.3%
	85 +	1,013	1,090	1,127	1,243	1,449	1,811	78.8%
WISCONSIN	19 and under	56,927	58,411	57,688	57,385	58,651	62,760	10.2%
	20-34	76,244	78,910	83,126	86,724	88,593	88,030	15.5%
	35-44	3,590	4,003	4,249	4,676	5,299	6,418	78.8%
	45-59	165,633	165,858	168,878	171,045	169,811	167,928	1.4%
	60-84	129,984	138,207	144,019	149,841	157,473	164,003	26.2%
	85 +	39,010	41,370	43,206	44,424	45,112	45,273	16.1%

Table 10: Median Household Income

County	1980	1990	2000	2010	2000 - 2010 % Change	1980 - 2010 % Change	1980 - 2010 Net Change
Adams	\$12,990	\$21,548	\$33,408	\$39,885	-7.20%	16.00%	\$26,895
Forest	\$11,214	\$16,907	\$32,023	\$37,627	-9.10%	26.80%	\$26,413
Juneau	\$12,528	\$22,073	\$35,335	\$45,664	2.60%	37.70%	\$33,136
Langlade	\$12,738	\$20,703	\$33,168	\$41,034	-2.90%	21.70%	\$28,296
Lincoln	\$14,267	\$25,175	\$39,120	\$46,625	-7.40%	23.50%	\$32,358
Marathon	\$17,344	\$30,143	\$45,165	\$53,471	-8.20%	16.50%	\$36,127
Oneida	\$14,521	\$23,901	\$37,619	\$45,857	-4.70%	19.30%	\$31,336
Portage	\$16,659	\$28,686	\$43,487	\$51,456	-8.30%	16.70%	\$34,797
Vilas	\$12,373	\$20,352	\$33,759	\$41,631	-3.30%	27.10%	\$29,258
Wood	\$17,482	\$29,735	\$41,595	\$47,204	-13.10%	2.00%	\$29,722
Region	\$15,737	\$26,871	\$40,538	\$48,302	-7.50%	16.00%	\$32,565
North	\$13,487	\$22,433	\$36,022	\$43,774	-5.10%	22.60%	\$30,287
Central	\$17,232	\$29,675	\$43,711	\$51,214	-9.50%	12.30%	\$33,982
South	\$12,708	\$21,853	\$34,470	\$43,055	-1.70%	28.00%	\$30,347
State	\$17,680	\$29,442	\$43,791	\$49,001	-14.70%	4.70%	\$31,321

U.S. Census (reflects 1979, 1989, 1999, and 2009 income)

Table 11: Per Capita Income

County	1980	1990	2000	2010	2000 - 2010 % Change	1980 - 2010 % Change	1980 - 2010 Net Change
Adams	\$5,647	\$10,926	\$17,777	\$21,917	-2.60%	46.70%	\$16,270
Forest	\$4,427	\$8,339	\$16,451	\$20,578	-1.20%	75.60%	\$16,151
Juneau	\$5,590	\$10,304	\$17,892	\$23,026	1.60%	55.70%	\$17,436
Langlade	\$5,386	\$10,172	\$16,960	\$22,025	2.60%	54.50%	\$16,639
Lincoln	\$6,160	\$11,282	\$17,940	\$23,793	4.70%	46.00%	\$17,633
Marathon	\$6,697	\$12,718	\$20,703	\$25,893	-1.20%	46.10%	\$19,196
Oneida	\$6,183	\$11,681	\$19,746	\$28,085	12.30%	71.60%	\$21,902
Portage	\$6,249	\$11,730	\$19,854	\$24,837	-1.20%	50.20%	\$18,588
Vilas	\$5,797	\$10,866	\$18,361	\$27,128	16.70%	76.80%	\$21,331
Wood	\$6,854	\$13,130	\$20,203	\$24,893	-2.70%	37.20%	\$18,039
Region	\$6,318	\$11,945	\$19,524	\$25,011	1.20%	49.50%	\$18,692
North	\$5,404	\$9,773	\$17,561	\$24,404	9.70%	70.60%	\$19,000
Central	\$6,638	\$12,597	\$20,350	\$25,360	-1.60%	44.40%	\$18,722
South	\$5,612	\$10,565	\$17,840	\$22,539	-0.20%	51.80%	\$16,927
State	\$7,243	\$13,286	\$21,271	\$25,458	-5.50%	32.80%	\$18,215

U.S. Census (reflects 1979, 1989, 1999, and 2009 income)

Table 12: Population and Labor Force

County	Population over 16 years of age	Labor Force	Participation rate	Unemployment
Adams	17893	9036	50.5%	9.3%
Forest	7670	4194	54.7%	8.0%
Juneau	21526	13693	63.6%	8.5%
Langlade	16394	10398	63.4%	7.6%
Lincoln	23562	15222	64.6%	6.1%
Marathon	104597	74641	71.4%	6.7%
Oneida	30380	18771	61.8%	6.3%
Portage	56942	39180	68.8%	6.7%
Vilas	18406	10490	57.0%	9.2%
Wood	59550	39400	66.2%	6.9%
Region	356920	235025	65.8%	
State	4487568	3084116	68.7%	7.1%

2007-2011 American Community Survey

Table 13: People Who Have Completed Four Years of High School

County	1980	1990	2000	2010	2000	2010	1980 - 2000
					Percent	Percent	Net Change
Adams	5,011	4,534	10,528	13,592	76.80%	84.00%	5,517
Forest	2,977	2,177	5,255	5,666	78.30%	85.60%	2,278
Juneau	7,472	5,929	12,914	15,834	78.50%	84.70%	5,442
Langlade	6,993	5,666	11,627	12,639	81.10%	87.30%	4,634
Lincoln	9,343	7,060	16,414	18,105	81.80%	87.30%	7,071
Marathon	40,390	29,494	68,643	78,483	83.90%	88.40%	28,253
Oneida	13,663	8,379	22,498	24,903	85.00%	91.90%	8,835
Portage	20,002	14,082	34,704	38,904	86.50%	90.40%	14,702
Vilas	7,693	4,687	13,387	15,411	85.60%	91.70%	5,694
Wood	27,835	19,986	42,597	46,123	84.60%	89.20%	14,762
Region	141,379	101,994	238,567	269,660	83.50%	88.70%	97,188
North	40,669	27,969	69,181	76,724	83.10%	89.50%	28,512
Central	88,227	63,562	145,944	163,510	84.70%	89.10%	57,717
South	12,483	10,463	23,442	29,426	77.70%	84.30%	10,959
State	1,883,095	2,432,154	2,957,461	3,424,870	85.10%	90.10%	1,074,366

US Census 1980, 1990, 2000, 2010

Table 14: People Who Have Completed Four or More Years of College

County	1980	1990	2000	2010	2000	2010	1980 - 2010
					Percent	Percent	Net Change
Adams	645	842	1,369	1,744	10.00%	10.80%	1,099
Forest	415	429	671	793	10.00%	12.00%	378
Juneau	979	1,222	1,682	2,264	10.20%	12.10%	1,285
Langlade	1,011	1,139	1,682	1,865	11.70%	12.90%	854
Lincoln	1,541	1,903	2,732	3,050	13.60%	14.70%	1,509
Marathon	7,267	9,736	14,994	18,492	18.30%	20.80%	11,225
Oneida	2,566	3,301	5,280	6,065	19.90%	22.40%	3,499
Portage	5,097	6,701	9,378	11,646	23.40%	27.10%	6,549
Vilas	1,285	1,753	2,754	4,203	17.60%	25.00%	2,918
Wood	4,666	6,315	8,486	9,946	16.90%	19.20%	5,280
Region	25,472	33,341	49,028	60,068	17.20%	19.80%	34,596
North	6,818	8,525	13,119	15,976	15.80%	18.60%	9,158
Central	17,030	22,752	32,858	40,084	19.10%	21.80%	23,054
South	1,624	2,064	3,051	4,008	10.10%	11.50%	2,384
State	401,076	547,678	779,273	1,001,353	22.40%	26.30%	600,277

US Census 1980, 1990, 2000, 2010

Table 15: Total Employment

County	1980	1990	% Change 1980-1990	2000	% Change 1990-2000	2011	2013	%Change 2000-2013
Adams	2168	2643	21.91%	3558	34.62%	4240	6070	70.60%
Forest	1826	2060	12.81%	2988	45.05%	3075	3578	19.75%
Juneau	5345	7195	34.61%	8596	19.47%	8590	10163	18.23%
Langlade	5275	6439	22.07%	7838	21.73%	7250	8895	13.49%
Lincoln	7793	9795	25.69%	11953	22.03%	9923	11413	-4.52%
Marathon	40051	49407	23.36%	65630	32.84%	63735	70900	8.03%
Oneida	9943	12192	22.62%	16753	37.41%	15064	18625	11.17%
Portage	18632	24821	33.22%	30191	21.63%	31039	36000	19.24%
Vilas	3758	4428	17.83%	7256	63.87%	6544	8642	19.10%
Wood	29811	36172	21.34%	42926	18.67%	41282	46000	7.16%
Region	124602	155152	24.52%	197689	27.42%	190742	220286	11.43%
North	28595	34914	22.10%	46788	34.01%	41856	51153	9.33%
Central	88494	110400	24.75%	138747	25.68%	136056	152900	10.20%
South	7513	9838	30.95%	12154	23.54%	12830	16233	33.56%
State	1882772	2165996	15.04%	2684824	23.95%	2598133	2,989,700	11.36%

Table 16: Employment by Sector

Sector	NAICS	Year			% Change	% Change	% Change
		2001	2010	2013	2001-2010	2010-2013	2001-2013
Agriculture, Forestry, Fishing, Hunting	11	8,819	8,999	9,077	2.04%	0.87%	2.93%
Mining	21	187	124	110	-33.69%	-11.29%	-41.18%
Utilities	22	387	530	597	36.95%	12.64%	54.26%
Construction	23	11,845	10,006	9,507	-15.53%	-4.99%	-19.74%
Manufacturing	31-33	44,451	32,411	32,910	-27.09%	1.54%	-25.96%
Wholesale Trade	42	7,641	7,554	7,779	-1.14%	2.98%	1.81%
Retail Trade	44-45	30,689	26,851	26,842	-12.51%	-0.03%	-12.54%
Transportation & Warehousing	48-49	10,768	10,519	10,909	-2.31%	3.71%	1.31%
Information	51	3,343	2,535	2,305	-24.17%	-9.07%	-31.05%
Finance & Insurance	52	11,033	12,138	12,088	10.02%	-0.41%	9.56%
Real Estate & Rental & Leasing	53	1,671	1,639	1,508	-1.92%	-7.99%	-9.75%
Professional & Technical Services	54	4,681	5,110	5,072	9.16%	-0.74%	8.35%
Mgmt of Companies & Enterprises	55	1,483	1,522	1,997	2.63%	31.21%	34.66%
Admin & Waste Services	56	4,307	5,390	4,754	25.15%	-11.80%	10.38%
Educational Services	61	1,411	1,233	1,223	-12.62%	-0.81%	-13.32%
Health Care & Social Assistance	62	26,109	31,871	32,664	22.07%	2.49%	25.11%
Arts Entertainment & Recreation	71	2,506	2,308	2,516	-7.90%	9.01%	0.40%
Accommodation & Food Services	72	16,982	17,199	17,377	1.28%	1.03%	2.33%
Other Services Except Public Admin	81	11,018	11,275	10,428	2.33%	-7.51%	-5.35%
Public Admin	92	31,479	32,189	30,651	2.26%	-4.78%	-2.63%
Totals		230,810	221,403	220,314	-4.08%	-0.49%	-4.55%

Wisconsin Department of Workforce Development, Bureau of Workforce Information

Table 17: Annual Unemployment Rates 1993-2012

	Unemployment Rate																			
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Region	5.3	5.2	4.8	4.4	4.4	4.3	3.8	3.9	4.7	5.5	5.8	5.4	5.2	5.1	5.1	5.2	9.2	9.2	8.2	7.8
State	4.5	4.3	3.7	3.6	3.5	3.3	3.1	3.4	4.4	5.3	5.6	5	4.8	4.7	4.8	4.8	8.7	8.5	7.5	6.9
United States	6.9	6.1	5.6	5.4	4.9	4.5	4.2	4	4.7	5.8	6	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1

Wisconsin Department of Workforce Development, Local Area Unemployment Statistics

Table 18: 2012 Unemployment	
Area	Unemployment Rate
Adams County	9.90%
Forest County	9.50%
Juneau County	8.70%
Langlade County	8.70%
Lincoln County	9.50%
Marathon County	7.20%
Oneida County	8.90%
Portage County	6.60%
Vilas County	9.50%
Wood County	7.20%
North Central Region	7.80%
Wisconsin	6.90%
United States	8.10%

Wisconsin Department of Workforce Development, Local Area Unemployment Statistics

Table 19: Employment by Subsector (NAICS 3 Digit)

NAICS Code	Description	2013 Jobs	2023 Jobs	Change	% Change
111	Crop Production	5,442	5,078	(364)	-6.69%
112	Animal Production	2,571	2,514	(57)	-2.22%
113	Forestry and Logging	570	400	(170)	-29.82%
114	Fishing, Hunting and Trapping	12	<10	--	--
115	Support Activities for Agriculture and Forestry	483	478	(5)	-1.04%
211	Oil and Gas Extraction	0	0	0	--
212	Mining (except Oil and Gas)	110	75	(35)	-31.82%
213	Support Activities for Mining	0	0	0	--
221	Utilities	597	433	(164)	-27.47%
236	Construction of Buildings	2,777	2,584	(193)	-6.95%
237	Heavy and Civil Engineering Construction	906	1,052	146	16.11%
238	Specialty Trade Contractors	5,824	6,587	763	13.10%
311	Food Manufacturing	3,935	3,617	(318)	-8.08%
312	Beverage and Tobacco Product Manufacturing	81	99	18	22.22%
313	Textile Mills	14	14	0	0.00%
314	Textile Product Mills	155	226	71	45.81%
315	Apparel Manufacturing	27	31	4	14.81%
316	Leather and Allied Product Manufacturing	335	287	(48)	-14.33%
321	Wood Product Manufacturing	3,967	3,372	(595)	-15.00%
322	Paper Manufacturing	5,407	4,656	(751)	-13.89%
323	Printing and Related Support Activities	1,102	1,064	(38)	-3.45%
324	Petroleum and Coal Products Manufacturing	19	11	(8)	-42.11%
325	Chemical Manufacturing	379	384	5	1.32%
326	Plastics and Rubber Products Manufacturing	778	719	(59)	-7.58%
327	Nonmetallic Mineral Product Manufacturing	1,172	1,360	188	16.04%
331	Primary Metal Manufacturing	716	808	92	12.85%
332	Fabricated Metal Product Manufacturing	6,500	6,839	339	5.22%
333	Machinery Manufacturing	4,983	6,530	1,547	31.05%
334	Computer and Electronic Product Manufacturing	127	102	(25)	-19.69%
335	Electrical Equipment, Appliance, and Component Manufacturing	532	325	(207)	-38.91%
336	Transportation Equipment Manufacturing	1,051	712	(339)	-32.25%
337	Furniture and Related Product Manufacturing	732	577	(155)	-21.17%
339	Miscellaneous Manufacturing	898	736	(162)	-18.04%
423	Merchant Wholesalers, Durable Goods	3,446	4,051	605	17.56%
424	Merchant Wholesalers, Nondurable Goods	3,950	4,472	522	13.22%
425	Wholesale Electronic Markets and Agents and Brokers	383	603	220	57.44%
441	Motor Vehicle and Parts Dealers	3,269	3,413	144	4.41%
442	Furniture and Home Furnishings Stores	588	535	(53)	-9.01%
443	Electronics and Appliance Stores	561	664	103	18.36%
444	Building Material and Garden Equipment and Supplies Dealers	2,389	2,956	567	23.73%
445	Food and Beverage Stores	4,310	3,926	(384)	-8.91%
446	Health and Personal Care Stores	886	964	78	8.80%
447	Gasoline Stations	2,150	1,928	(222)	-10.33%
448	Clothing and Clothing Accessories Stores	963	990	27	2.80%
451	Sporting Goods, Hobby, Book, and Music Stores	806	841	35	4.34%
452	General Merchandise Stores	5,640	6,484	844	14.96%
453	Miscellaneous Store Retailers	1,374	1,324	(50)	-3.64%
454	Nonstore Retailers	3,906	3,691	(215)	-5.50%
481	Air Transportation	75	105	30	40.00%
482	Rail Transportation	426	514	88	20.66%
483	Water Transportation	<10	<10	--	--
484	Truck Transportation	7,550	9,130	1,580	20.93%
485	Transit and Ground Passenger Transportation	1,184	1,259	75	6.33%
486	Pipeline Transportation	<10	<10	--	--
487	Scenic and Sightseeing Transportation	16	25	9	56.25%
488	Support Activities for Transportation	280	396	116	41.43%
491	Postal Service (Private Sector)	<10	<10	--	--
492	Couriers and Messengers	702	744	42	5.98%
493	Warehousing and Storage	671	953	282	42.03%
511	Publishing Industries (except Internet)	1,046	968	(78)	-7.46%
512	Motion Picture and Sound Recording Industries	132	82	(50)	-37.88%
515	Broadcasting (except Internet)	381	437	56	14.70%
517	Telecommunications	598	724	126	21.07%
518	Data Processing, Hosting and Related Services	142	187	45	31.69%
519	Other Information Services	<10	<10	--	--
521	Monetary Authorities-Central Bank	0	0	0	--
522	Credit Intermediation and Related Activities	3,768	4,278	510	13.54%
523	Securities, Commodity Contracts, and Other Financial Investments	255	208	(47)	-18.43%
524	Insurance Carriers and Related Activities	8,052	9,215	1,163	14.44%
525	Funds, Trusts, and Other Financial Vehicles	13	27	14	107.69%
531	Real Estate	1,056	971	(85)	-8.05%
532	Rental and Leasing Services	427	460	33	7.73%
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	25	44	19	76.00%
541	Professional, Scientific, and Technical Services	5,072	5,921	849	16.74%
551	Management of Companies and Enterprises	1,997	2,259	262	13.12%
561	Administrative and Support Services	4,356	5,077	721	16.55%
562	Waste Management and Remediation Services	398	353	(45)	-11.31%
611	Educational Services (Private)	1,223	1,485	262	21.42%
621	Ambulatory Health Care Services	14,735	17,354	2,619	17.77%
622	Hospitals (Private)	8,555	9,220	665	7.77%
623	Nursing and Residential Care Facilities	5,354	6,895	1,541	28.78%
624	Social Assistance	4,020	4,878	858	21.34%
711	Performing Arts, Spectator Sports, and Related Industries	431	423	(8)	-1.86%
712	Museums, Historical Sites, and Similar Institutions	61	65	4	6.56%
713	Amusement, Gambling, and Recreation Industries	2,023	2,227	204	10.08%
721	Accommodation	3,493	3,899	406	11.62%
722	Food Services and Drinking Places	13,884	15,592	1,708	12.30%
811	Repair and Maintenance	2,324	2,541	217	9.34%
812	Personal and Laundry Services	1,836	1,823	(13)	-0.71%
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	5,298	5,866	568	10.72%
814	Private Households	971	623	(348)	-35.84%
901	Federal Government	3,095	2,859	(236)	-7.63%
902	State Government	3,964	4,089	125	3.15%
903	Local Government	23,592	23,778	186	0.79%
999	Unclassified Industry	<10	<10	--	--
	Total	220,317	236,478	16,161	7.34%

Table 20: Tourism Expenditures

State Rank	County	Direct Visitor Spending			Total Business Sales			Employment		
		Millions		%	Millions		%	Total		%
		2011	2012	Change	2011	2012	Change	2011	2012	Change
9	Marathon County	\$205.0	\$217.2	5.92%	\$344.3	\$363.5	5.56%	4,011	4,066	1.38%
13	Vilas County	\$177.2	\$195.4	10.25%	\$224.6	\$246.9	9.94%	1,859	1,906	2.52%
16	Oneida County	\$176.0	\$185.9	5.59%	\$233.1	\$246.2	5.62%	2,047	2,070	1.13%
18	Adams County	\$177.5	\$176.3	-0.67%	\$223.3	\$221.9	-0.63%	2,359	2,367	0.32%
24	Portage County	\$98.3	\$100.3	1.98%	\$173.6	\$179.2	3.22%	2,055	2,028	-1.33%
31	Wood County	\$78.6	\$77.9	-0.89%	\$149.5	\$151.3	1.18%	2,114	2,069	-2.13%
40	Juneau County	\$51.4	\$55.5	7.89%	\$73.7	\$79.4	7.75%	671	680	1.34%
42	Lincoln County	\$44.9	\$48.8	8.58%	\$70.0	\$75.3	7.46%	655	672	2.61%
43	Langlade County	\$42.1	\$43.3	2.85%	\$59.8	\$61.6	3.12%	509	511	0.43%
68	Forest County	\$10.9	\$11.5	5.28%	\$16.4	\$17.2	4.87%	212	207	-2.22%
	Region	\$1,062.0	\$1,111.9	4.70%	\$1,568.3	\$1,642.4	4.73%	16,493	16,577	0.51%
	North	\$451.2	\$484.8	7.45%	\$603.9	\$647.2	7.17%	5,282	5,367	1.60%
	Central	\$381.9	\$395.3	3.50%	\$667.4	\$693.9	3.97%	8,180	8,163	-0.21%
	South	\$228.9	\$231.8	1.25%	\$297.0	\$301.3	1.45%	3,031	3,047	0.55%
	State	\$9,899.2	\$10,395.4	5.01%	\$16,022.6	\$16,794.0	4.81%	181,320	183,786	1.36%

Table 21: Creative Industry in Region

County	CreativeBusinesses	Total Businesses	% of Businesses	People Employed	Total Employment	% of Pop employed
Adams	29	1452	2.00%	40	7127	0.56%
Forest	7	911	0.77%	42	4424	0.95%
Juneau	34	1756	1.94%	97	12832	0.76%
Langlade	21	1476	1.42%	192	10180	1.89%
Lincoln	33	1886	1.75%	84	13337	0.63%
Marathon	280	10094	2.77%	923	86749	1.06%
Onieda	115	4012	2.87%	294	24486	1.20%
Portage	173	5043	3.43%	446	37393	1.19%
Vilas	82	2524	3.25%	195	13556	1.44%
Wood	137	5685	2.41%	367	56767	0.65%
Region	911	34839	2.61%	2680	266851	1.00%
Wisconsin	12953	381296	3.40%	49526	3,120,411	1.59%
National	905,689	20490701	4.42%	3350000	155813953	2.15%

Americans for the Arts

APPENDIX C
COUNTY PROFILES