

# NCWRPC 2026 CEDS

## Five-Year Update

**Final DRAFT – December 2025**

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# CEDS Committee

Angie Close

Jason Grueneberg

Sara Guild

Elizabeth Haskovec

Angel Laidlaw

Tamaya Jo Loewe

Paul Millan

Melinda Osterberg

Tony Pharo

Holly Tomlanovich

Tommy Wartman

Kimm Weber

Langlade County EDC

Wood County

Lincoln County EDC

WEDC

Centergy

Juneau County EDC

Forest County

WEDC

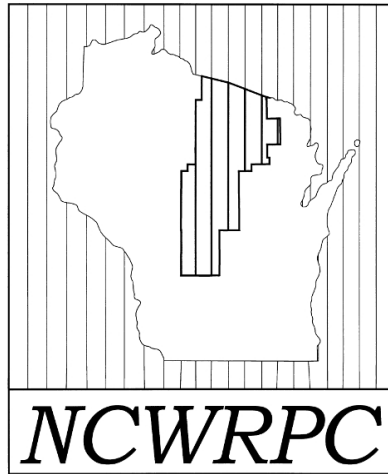
Oneida County EDC

Vilas County

Grow North

MCDEVCO



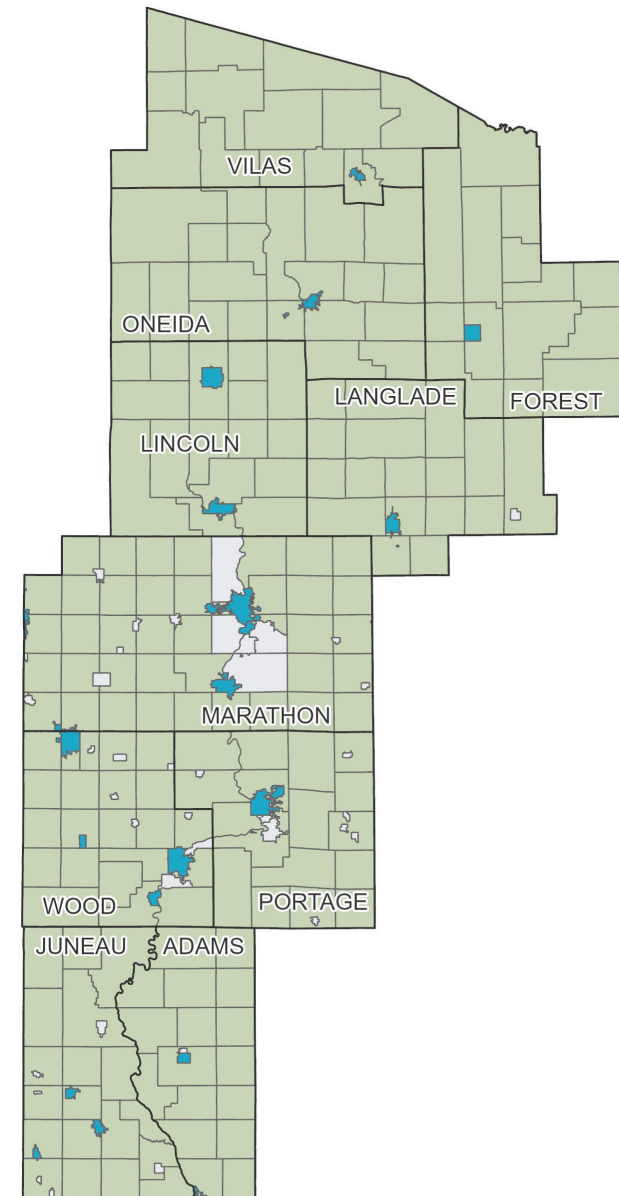


The North Central Wisconsin Regional Planning Commission (NCWRPC) is a voluntary association of governments, created in 1973 under Wisconsin State Statute 66.945, now 66.0309. The Region is also designated as an Economic Development District (EDD) by the U. S. Department of Commerce, Economic Development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

# Chapter 1 - Introduction

## 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. After taking this information into account, the CEDS then creates an economic strategy based on a set of attainable goals and an action plan. The CEDS is designed to build capacity and guide the economic prosperity and resiliency of the Region. Preparation and adoption of the CEDS maintains both the Region's EDD designation and also maintains grant eligibility for those participating units of government.



## 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 Region consists of 10 counties, 22 cities, 41 villages, and 195 towns, as shown in **Map 1**. The NCWRPC is governed by three commissioners from each member county, for a total of 30 commissioners. These commissioners oversee the activities of the executive director and the staff.

The NCWRPC is designated as an Economic Development District (EDD) by the U. S. Department of Commerce, Economic Development Administration (EDA). Current members of the EDD are Adams, Forest, Juneau, Langlade, Lincoln, Marathon, Oneida, Portage, Vilas, and Wood Counties. As an EDD, the NCWRPC receives funding from the EDA, provided the district completes an update of the CEDS every five years, submits an annual report, and carries out economic development activities identified within the CEDS. The funding that the NCWRPC receives from EDA allows NCWRPC to update and implement the CEDS. Implementing the CEDS involves working with local communities for economic development activities and to foster coordination and collaboration. A major component of the NCWRPC's work with local communities involves partnering with communities to obtain grant funding from various sources, including EDA grants.

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### EDA History in North Central Wisconsin

Since 1979 the North Central Wisconsin Regional Planning Commission has partnered with the EDA as an Economic Development District. That partnership has led to an investment of over \$33 million dollars in North Central Wisconsin projects.

**Table 1** displays EDA investments in the Region by county.

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.

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

County	Number of Awards	Amount Awarded
Adams	4	\$3,326,086
Forest	6	\$2,696,033
Juneau	5	\$2,188,885
Langlade	4	\$3,191,497
Lincoln	1	\$500,000
Marathon	5	\$4,722,346
Oneida	0	\$0
Portage	3	\$2,970,965
Vilas	5	\$8,620,937
Wood	8	\$3,931,310
Regional	7	\$1,191,850
<b>Total</b>	<b>48</b>	<b>\$33,339,909</b>

## CEDS Planning Process

Development of this plan occurred between Spring of 2025 and Winter of 2026. NCWRPC formed a CEDS Committee consisting of commission members and economic development professionals throughout the Region. Virtual meetings were held by the CEDS Committee to review chapters drafted by NCWRPC Staff, and to review economic data, conduct a SWOT Analysis, and to establish goal, objectives, and policies in an effort to create a new regional strategy. Economic development corporations, regional organizations, and others were provided with an opportunity to review and comment on the CEDS in January 2026.

A final draft of the plan was presented to the full NCWRPC Commission in January of 2026 and was later adopted by the Committee on January 28, 2026.

The 2026 CEDS Committee consisted of 11 individuals representing the economic interests of the Region. The CEDS Committee met virtually three times, with an overview of each meeting listed below. A more detailed summary of each meeting is included in **Appendix A**.

### CEDS Committee Meeting #1

Held on July 17, 2025, this meeting introduced the CEDS purpose and planning process, described the impact of EDA in North Central Wisconsin, and included an overview of demographic and employment data.

### CEDS Committee Meeting #2

Held on October 8, 2025, the CEDS Committee reviewed economic conditions, infrastructure, and economic development resources in the Region. The Committee also started the SWOT Analysis by identifying Strengths & Weaknesses.

### CEDS Committee Meeting #3

Held on December 11, the first part of this meeting involved completing the SWOT Analysis by identifying Opportunities & Threats. The CEDS Committee then reviewed and established goals, objectives, and policies, and established an action plan for the Region.

# Chapter 2 – Demographics & Employment



## Population and Labor Force

- Population
- Age
- Education
- Labor Force Status
- Employment

## Industry

- NAICS 2-Digit Employment and Average Wages
  - NAICS 2-Digit Employment Concentration
- NAICS 3-Digit Specialization & Employment Concentration



## Business Environment

- Total Business Establishments
- Annual Business Startups
- Business Births & Exits

## Occupation

- SOC High-Level Employment and Average Annual Wage
  - SOC 2-Digit Employment and Average Wage
- SOC 2-Digit Employment Change and Average Wage



## Population and Labor Force

Examining recent and projected population trends, age distribution, educational attainment, labor force size, labor force participation rates, employment, and unemployment rates help provide important context on the Region's people and how they are faring. Examining recent and projected population growth trends, as well as age distribution, can help determine the current and future needs of the regional population. This helps the Region to be better prepared for the infrastructure, services, and development patterns that will be needed to accommodate the population. Examining educational attainment levels and degree completions among the adult population helps provide context for the distribution of talent available in the Region and can help the Region prepare for changing trends in workforce development. Examining labor force size and participation rates can help determine the current and future economic competitiveness of the Region.

## Recent Population Trends and Projected Population

Over 448,000 people resided in the North Central Wisconsin Region in 2023, representing a four percent increase in population since 2000. Since 2000, six of the Region's ten counties have experienced an increase in population, with Vilas County experiencing the fastest growth in population during this time. Forest County experienced the fastest decrease in population among the four counties within the Region that experienced a decrease in population during this time. **Table 2** shows population trends from 2000 to 2023 for the North Central Wisconsin Region.

The North Central Wisconsin Region is projected to increase by about six percent between 2020 and 2050 according to population projections conducted by the NCWRPC. According to these projections, the North Central Wisconsin Region is estimated to reach a population of 474,852 people in 2050. Six of the Region's ten counties are projected to experience a population increase during this time, with Juneau County projected to experience the fastest growth in population during this time. Forest County is projected to experience the fastest decrease in population during this time among the counties that are projected to decrease in population. **Table 3** shows projected population growth for the North Central Wisconsin Region from 2020 to 2050.

Table 2: Population Trends					
	2000	2010	2020	2023	Change
Adams	19,920	20,875	20,654	20,928	5.1%
Forest	10,024	9,304	9,179	9,261	-7.6%
Juneau	24,316	26,664	26,718	26,695	9.8%
Langlade	20,740	19,977	19,491	19,473	-6.1%
Lincoln	29,641	28,743	28,415	28,403	-4.2%
Marathon	125,834	134,063	138,013	138,067	9.7%
Oneida	36,776	35,998	37,845	38,007	3.3%
Portage	67,182	70,019	70,377	70,375	4.8%
Vilas	21,033	21,430	23,047	23,410	11.3%
Wood	75,555	74,749	74,207	74,039	-2.0%
<b>Region</b>	<b>431,021</b>	<b>441,822</b>	<b>447,946</b>	<b>448,658</b>	<b>4.1%</b>
Wisconsin	5,363,715	5,688,040	5,893,718	5,892,023	9.8%

Source: U.S. Census, American Community Survey

Table 3: Projected Population					
	2020 Census	2030 Projection	2040 Projection	2050 Projection	Change
Adams	20,654	21,035	21,422	21,817	5.6%
Forest	9,179	8,792	8,422	8,067	-12.1%
Juneau	26,718	28,038	29,422	30,876	15.6%
Langlade	19,491	18,904	18,335	17,783	-8.8%
Lincoln	28,415	27,827	27,252	26,688	-6.1%
Marathon	138,013	144,692	151,694	159,035	15.2%
Oneida	37,845	38,395	38,953	39,519	4.4%
Portage	70,377	72,050	73,764	75,518	7.3%
Vilas	23,047	24,150	25,307	26,518	15.1%
Wood	74,207	73,545	72,889	72,239	-2.7%
<b>Region</b>	<b>447,946</b>	<b>456,741</b>	<b>465,708</b>	<b>474,852</b>	<b>6.0%</b>
Wisconsin	5,893,718	6,497,304	7,162,704	7,896,249	34.0%

Source: NCWRPC



## Age Distribution

The population of the North Central Wisconsin Region continues to shift towards having more individuals aged 65 and older and less individuals under the age of 18. These groups are known as dependent populations, since these age groups often require different services and the fact that most of the workforce is between the two age groups. As this trend continues, the Region's economy will change as senior-oriented services will be in higher

demand, and there will be a lower proportion of the population that is of working age to help fill the Region's employment and service needs.

In the North Central Wisconsin Region, the percentage of the population age 65 and older increased from 16.9 percent of the population in 2010 to 21.8 percent of the population in 2023. The percentage of the population below the age of 18 in the Region decreased from 21.9 percent in 2010 to 20.0 percent in 2023.

Figure 1: Percent of Population Age 65+

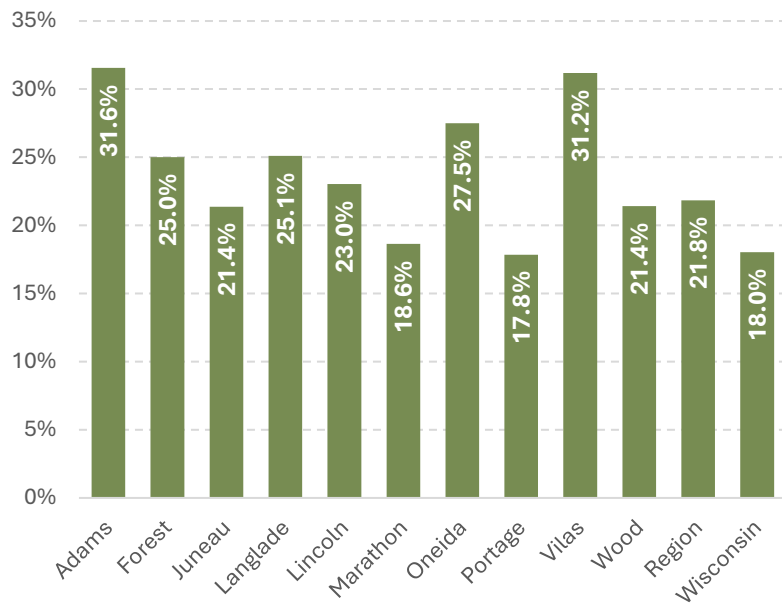
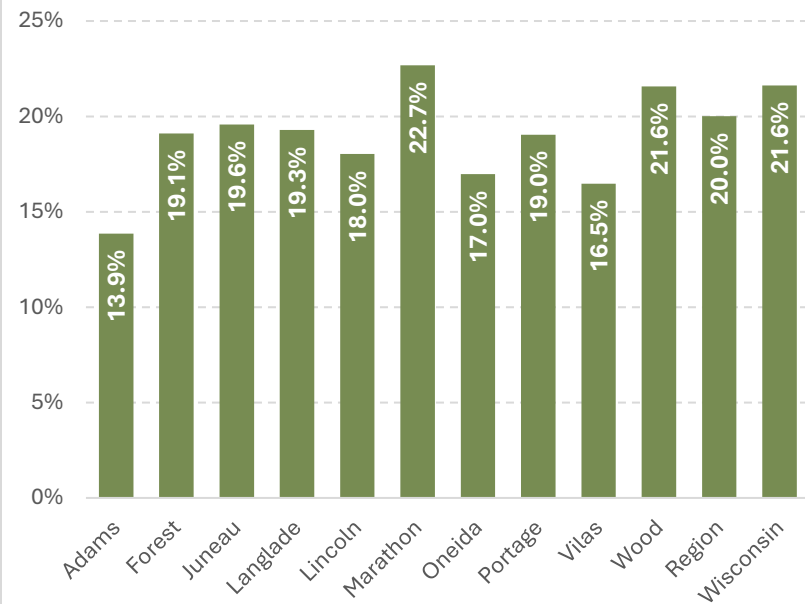


Figure 2: Percent of Population Below 18



## Education

Educational attainment levels within North Central Wisconsin continue to increase. In 2023, over 93 percent of residents age 25 and older within the North Central Wisconsin Region held a high school degree or higher level of educational attainment, higher than 2010 when about 89 percent of the population held a high school degree or higher. This trend is also true for the percentage of residents with a bachelor's degree or higher. In 2023, over 25 percent of the Region's population held a bachelor's degree or higher, compared to 2010 when about 20 percent of the population held a bachelor's degree or higher. **Table 4** shows educational attainment by county in 2023.

When examining the skill and talent potential of the Regional workforce, it is important to examine the proportion of individuals with an associate's degree or higher. Associate's degrees can help determine the proportion of the population who have continued their education and gained credentials, degrees, skills, and knowledge that are often needed to fill jobs. Over 37 percent of individuals age 25 and older within the North Central Wisconsin Region held an associate's degree or higher in 2023. This was below the State's percentage of 44 percent of residents hold an

associate's degree or higher. Portage County (46.7 percent) had the highest percentage of residents with an associate's degree or higher within the Region, while Adams County had the lowest percentage (26.5 percent) within the Region. Four counties (Marathon, Oneida, Portage, and Vilas) had a higher percentage of residents with an associate's degree or higher than the Regional percentage. **Figure 3** shows the share of the population with an associate's degree or higher in 2023 and shows the highest level of degree that they have obtained.

Identifying the top educational programs that residents are completing can help to identify the skillsets held by the Regional workforce and can identify the types of occupations that are desired by workers. In 2023, the largest programs by degree completions in the North Central Wisconsin Region were related to Health, Business Management, Education, Natural Resources, and Liberal Arts, among others. Within the Region, UW-Stevens Point offers undergraduate and graduate degree opportunities while several technical colleges offer an array of associate's degree opportunities. **Figure 4** shows the top programs by program completions within North Central Wisconsin.

**Table 4: Educational Attainment in North Central Wisconsin, 2023**

	Adams	Forest	Juneau	Langlade	Lincoln	Marathon	Oneida	Portage	Vilas	Wood	Region	Wisconsin
High School Graduate or Higher	89.0%	90.7%	89.7%	89.8%	92.5%	93.1%	95.7%	94.8%	96.1%	93.5%	<b>93.2%</b>	93.4%
Associate's Degree or Higher	26.5%	27.9%	27.8%	26.9%	32.2%	40.5%	41.0%	46.7%	41.7%	35.7%	<b>37.8%</b>	44.0%
Bachelor's Degree or Higher	17.3%	15.5%	16.3%	16.2%	19.4%	27.3%	28.4%	33.7%	30.5%	21.4%	<b>25.1%</b>	32.8%

*Source: U.S. Census, American Community Survey*

Figure 3: Share of Population Age 25+ with an Associates Degree or Higher by County, 2023

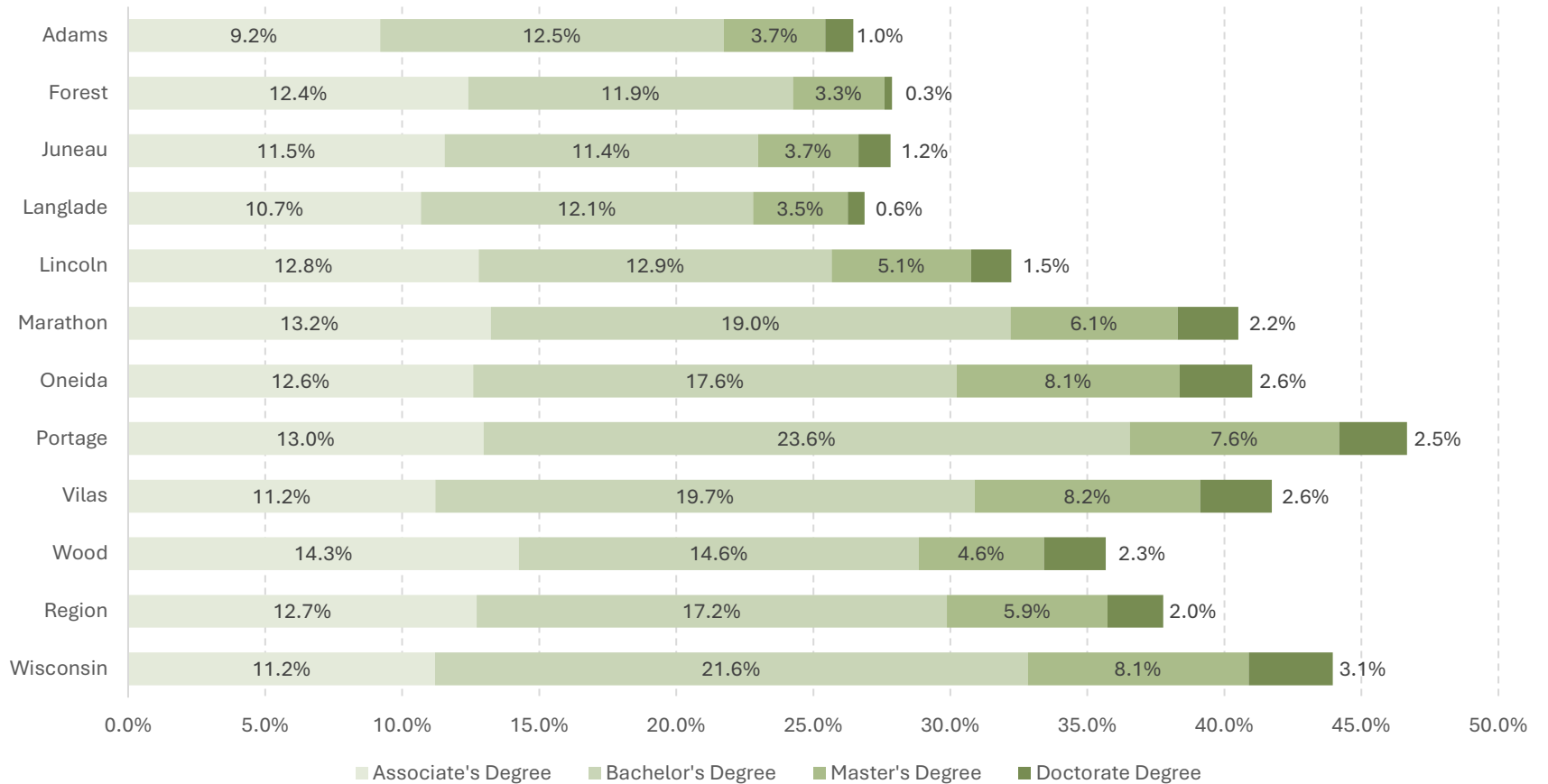
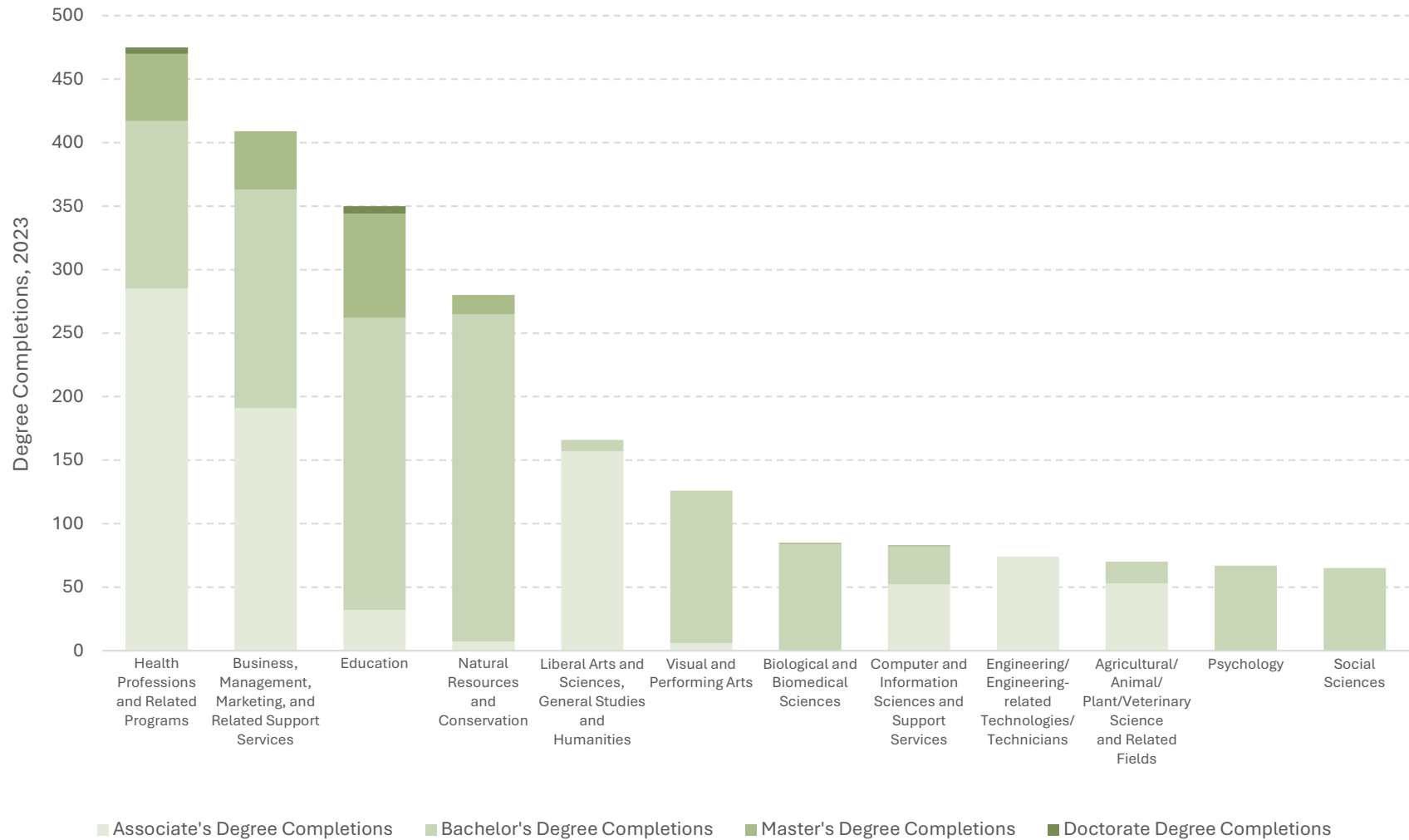


Figure 4: Regional Top 12 Program Completions, 2023



## Labor Force Status

The total Regional labor force is the population 16 years of age and older that is employed or actively pursuing employment. Persons 16 and older who are students, homemakers, retired, institutionalized, or unable/unwilling to seek employment are not considered part of the labor force. There were 369,817 individuals age 16 and older living in the North Central Wisconsin Region in 2023. The Region's labor force was comprised of 227,768 individuals in 2023. **Table 5** shows labor force totals by county for the Region over the past decade.

The Regional labor force participation rate was 61.6 percent in 2023. Marathon County (67.2 percent) had the highest labor force participation rate within the Region in 2023, while Adams County (48.1 percent) had the lowest. **Figure 5** shows labor force participation rates by County in 2023, while **Figure 6** shows changes in labor force size over the past decade.

Table 5: Labor Force Totals										
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Adams	8,512	8,302	8,188	8,194	8,121	8,271	8,414	8,366	8,636	8,853
Forest	4,055	3,961	3,978	3,987	3,972	3,940	3,902	3,941	3,937	3,877
Juneau	13,011	12,499	12,593	12,555	12,714	12,705	13,053	12,908	12,851	12,528
Langlade	9,690	9,566	9,623	9,513	9,255	9,333	9,260	9,365	9,405	9,516
Lincoln	14,837	14,873	14,999	14,930	14,769	14,697	14,217	14,370	14,181	14,181
Marathon	74,898	74,083	73,790	73,952	73,696	73,789	73,426	74,721	74,139	74,270
Oneida	18,004	17,684	17,393	17,528	17,201	17,029	16,931	17,393	17,187	17,705
Portage	39,078	39,204	39,293	39,120	39,310	39,139	39,007	39,145	38,982	38,997
Vilas	9,841	9,771	9,725	9,811	9,907	10,061	9,998	10,398	10,674	10,832
Wood	38,859	39,043	38,930	38,357	37,907	37,386	37,454	37,239	37,426	37,009
<b>Region</b>	<b>230,785</b>	<b>228,986</b>	<b>228,512</b>	<b>227,947</b>	<b>226,852</b>	<b>226,350</b>	<b>225,662</b>	<b>227,846</b>	<b>227,418</b>	<b>227,768</b>
Wisconsin	3,076,311	3,079,657	3,082,186	3,087,719	3,092,330	3,097,113	3,096,518	3,127,362	3,129,606	3,125,057

Source: U.S. Census, American Community Survey

Figure 5: Labor Force Participation Rate, 2023

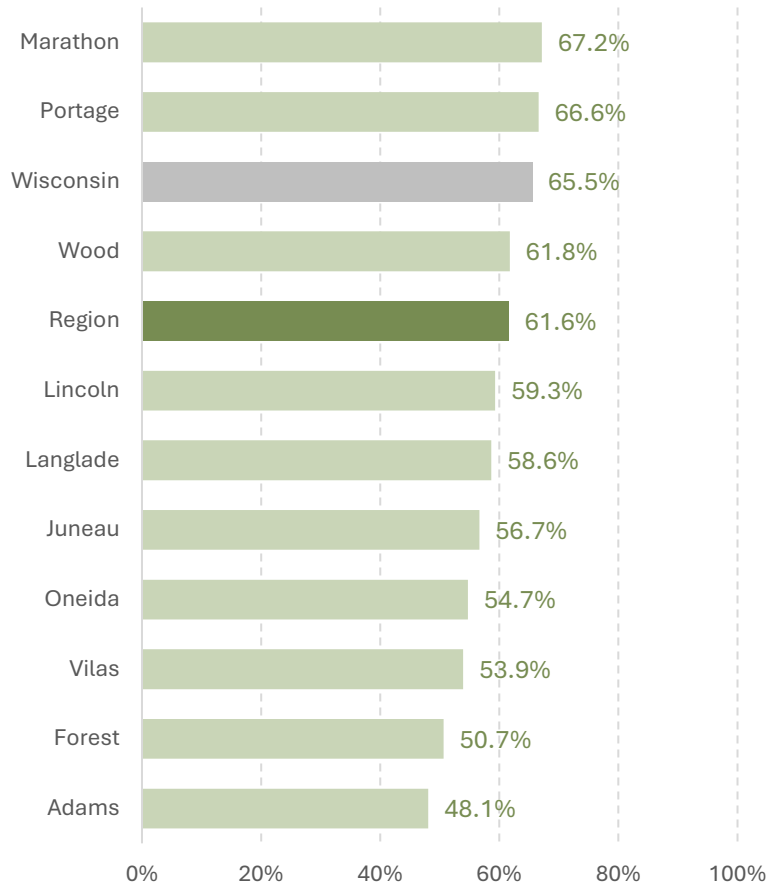
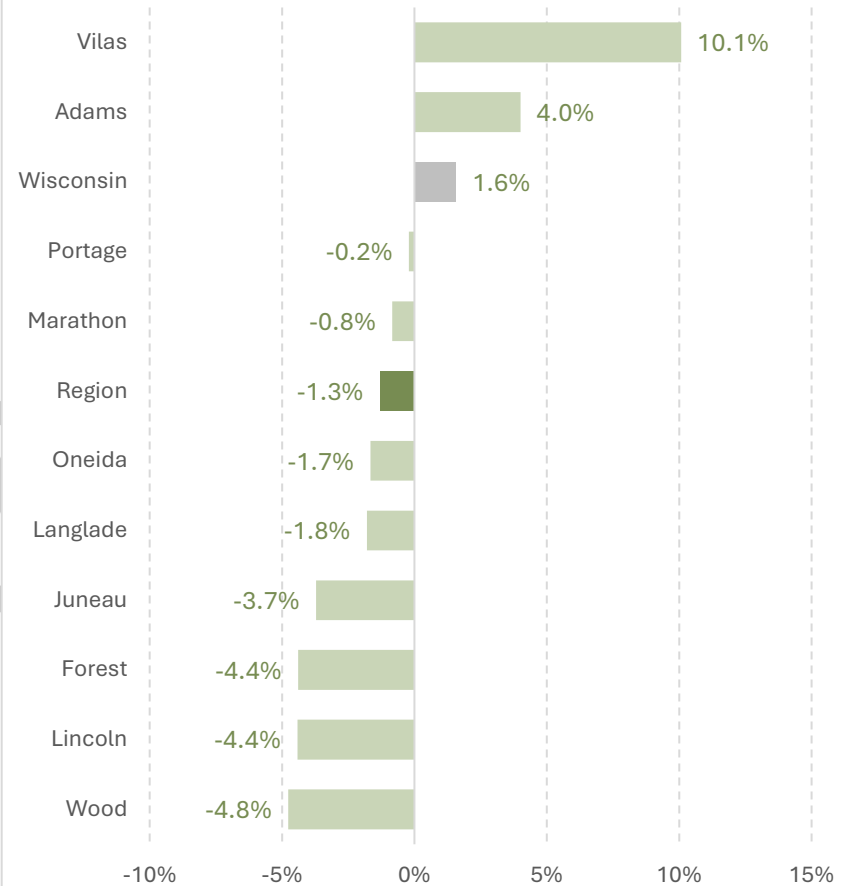


Figure 6: Change in Labor Force Size (2014-2023)



## Employment

In 2023, there were 214,977 people employed in the North Central Wisconsin Region, a decrease of over 5 percent since 2000 when there were 226,531 people employed. Juneau County and Marathon County were the only counties within the Region to experience an increase in employment during this time. However, employment is higher now than it was in 2010, as Regional employment has increased by about one percent since 2010. **Table 6** shows employment trends by county since 2000. The ramifications of the COVID-19 pandemic negatively impacted

employment and led to a drastic and sudden decrease in employment, as Regional employment decreased by about 2 percent between 2010 and 2020 (with most of these job losses occurring in 2020). The Region has since recovered these lost jobs and has surpassed 2010 employment levels as it moves forward from the impacts of the pandemic. These trends indicate that while employment is currently increasing, employment levels have still yet to reach their pre-recession (2008) levels.

Table 6: Total Employment					
	2000	2010	2020	2023	Change
Adams	8,502	8,022	7,334	7,654	-10.0%
Forest	4,381	3,764	3,427	3,756	-14.3%
Juneau	12,185	12,359	12,451	13,169	8.1%
Langlade	10,306	9,083	8,764	8,898	-13.7%
Lincoln	15,489	13,920	13,951	14,140	-8.7%
Marathon	69,750	66,842	69,400	70,751	1.4%
Oneida	18,779	17,161	16,727	17,563	-6.5%
Portage	37,367	36,752	35,783	36,695	-1.8%
Vilas	10,428	9,197	9,640	10,044	-3.7%
Wood	39,344	36,337	32,421	32,307	-17.9%
<b>Region</b>	<b>226,531</b>	<b>213,437</b>	<b>209,898</b>	<b>214,977</b>	<b>-5.1%</b>
Wisconsin	2,880,877	2,820,966	2,902,114	3,056,957	6.1%

Source: U.S. Bureau of Labor Statistics LAUS

## Unemployment

Annual unemployment rates have been steadily decreasing since 2010, with a slight interruption due to the ramifications of the pandemic which caused a temporary spike in unemployment in 2020 and 2021. In 2023, the North Central Wisconsin Region's annual unemployment rate was 3.2 percent, which was lower than the unemployment rate in 2000. Annual unemployment rates reached a peak in 2010 following the recession in 2008, as the Regional unemployment rate reached 9.5 percent. **Table 7** compares the annual unemployment rates for 2000, 2010, 2020, and 2023 across the Region. Adams and Vilas Counties are the only two counties within the Region who had a higher

unemployment rate in 2023 than in 2000. Lower unemployment rates can suggest several different scenarios such as a comfortable working environment or potential labor shortages.

**Figure 7** compares monthly unemployment rates for the Region, State, and Nation from 2014-2024.

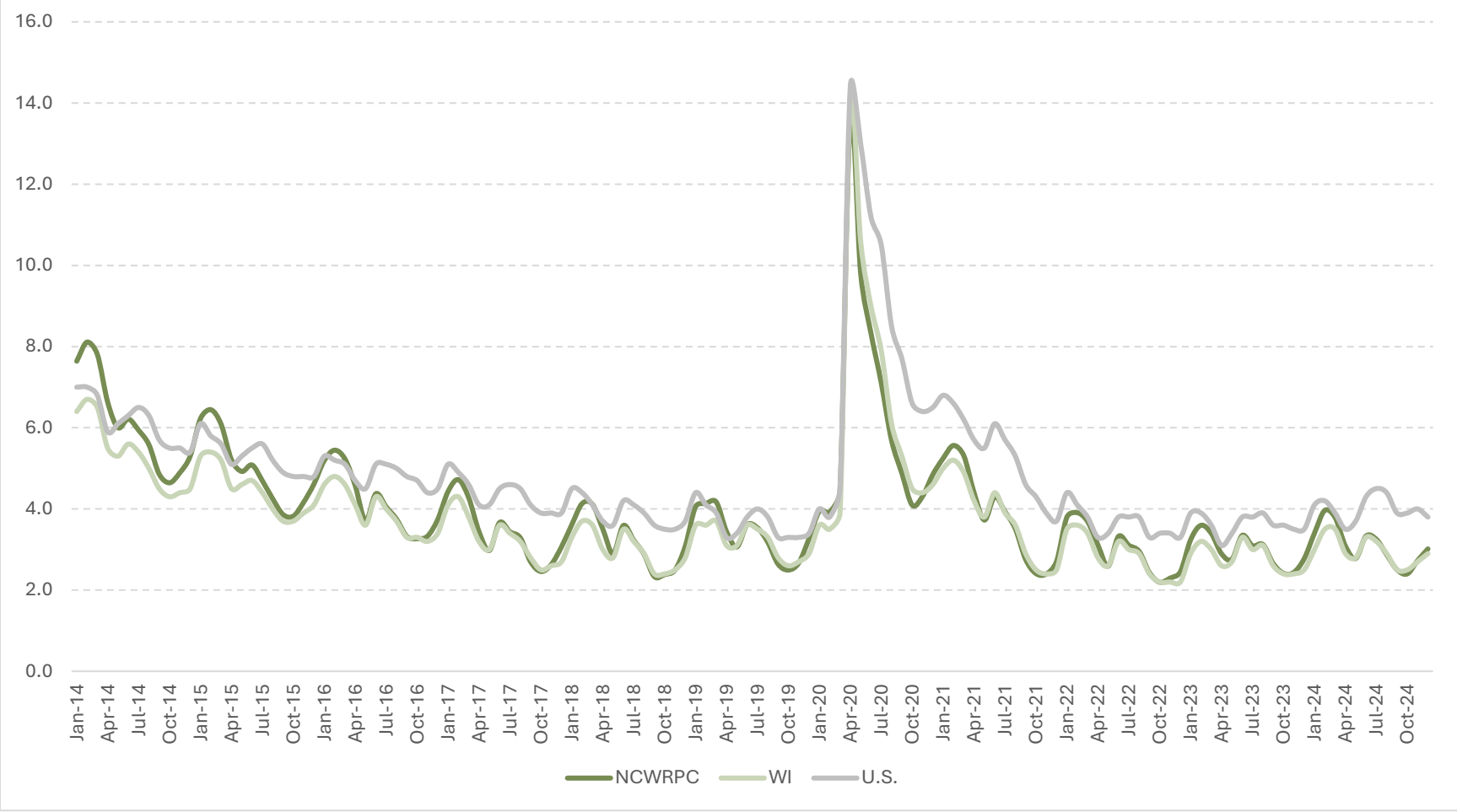
Due to the Region's strong Tourism industry, the unemployment rate in North Central Wisconsin fluctuates more seasonally than the rates for Wisconsin and the Nation. Unemployment rates are generally lower within the Region in the summer months and are generally higher during the winter months.

Table 7: Unemployment Rates					
	2000	2010	2020	2023	Change
Adams	4.4	12.2	9.8	5.1	15.9%
Forest	5.6	11.5	12.8	4.8	-14.3%
Juneau	4.9	9.8	7.4	3.2	-34.7%
Langlade	4.6	10.8	6.6	3.6	-21.7%
Lincoln	4.1	11.1	6.1	3.2	-22.0%
Marathon	3.3	9.1	5.1	2.7	-18.2%
Oneida	4.9	10.0	7.4	3.4	-30.6%
Portage	3.4	7.9	5.5	3.0	-11.8%
Vilas	3.9	7.3	11.1	4.9	25.6%
Wood	3.8	9.1	6.8	3.5	-7.9%
<b>Region</b>	<b>3.9</b>	<b>9.5</b>	<b>6.3</b>	<b>3.2</b>	<b>-17.9%</b>
Wisconsin	3.4	8.4	6.4	2.8	-17.6%

Source: U.S. Bureau of Labor Statistics LAUS



Figure 7: Regional, State, and US Monthly Unemployment Rate 2014-2024



Source: U.S. Bureau of Labor Statistics LAUS

## Business Environment

Examining the Region's business environment can help to determine the Region's economic well-being and overall competitiveness. A strong business environment is an indicator of a healthy and competitive economic environment. Being able to retain, support, and attract businesses is critical for the overall economy, and leads to more jobs. Examining the total number of business establishments can help determine whether the Region has a healthy business environment by tracking whether or not the Region is gaining or losing businesses over time. Tracking entrepreneurial and business startup activity can help determine how successful the Region is at attracting businesses, while tracking the number of business births and exits can help show the Region's ability to support businesses and overall economic dynamism (business churn). Supporting the entrepreneurial ecosystem is a vital economic development strategy because young, small-growth firms are currently responsible for the majority of net new jobs nationwide.

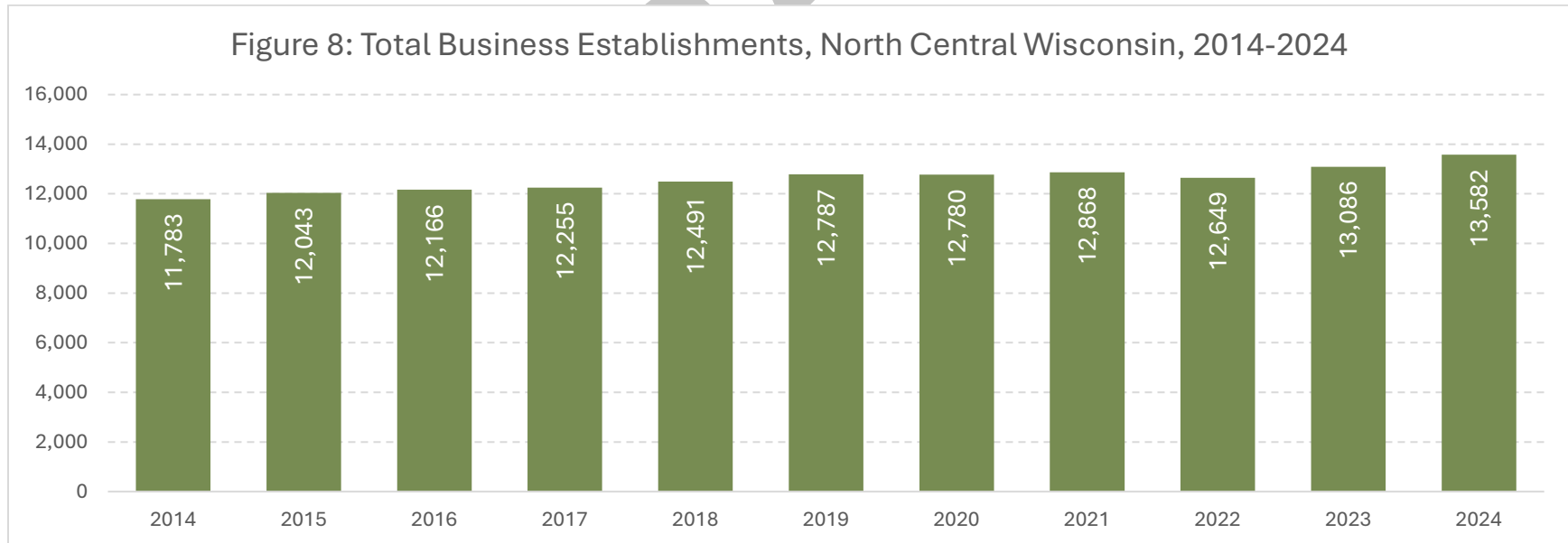
It is important to note that the data tracking business startups and business births and exits come from different data sources. Data tracking business startups comes from the U.S. Census Bureau's Business Formation Statistics and tracks the number of Employer Identification Number (EIN) applications. Data tracking business births and exits comes from the U.S. Census Bureau's Business Dynamics Statistics and track the business openings and closures over time. The most current data for business startups is in 2024, while the most current data for business births and exits is in 2023, hence the difference in timelines below.

## Total Business Establishments

Overall, North Central Wisconsin has experienced a net increase of 1,799 establishments in the number of business establishments since 2014, as the total number of business establishments increased to 13,582 in 2024. This represents an increase of over 15 percent since 2014. Each county within the Region experienced a net increase in the number of business establishments during this time, with Adams County experiencing the fastest net growth (34.1 percent) and Oneida County experiencing the slowest net growth (3.2 percent). **Table 8** shows total business establishments by county, while **Figure 8** shows the total number of business establishments per year within the North Central Wisconsin Region.

Table 8: Total Business Establishments												
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Change
Adams	334	341	344	337	340	348	348	348	347	404	448	34.1%
Forest	301	302	295	294	294	305	296	292	289	294	311	3.3%
Juneau	600	610	626	650	666	675	670	696	683	722	742	23.7%
Langlade	598	597	604	618	627	644	642	633	609	622	647	8.2%
Lincoln	696	719	743	754	771	788	784	778	763	769	805	15.7%
Marathon	3,361	3,426	3,456	3,469	3,554	3,646	3,653	3,694	3,652	3,804	3,999	19.0%
Oneida	1,458	1,481	1,474	1,450	1,462	1,461	1,463	1,453	1,419	1,463	1,505	3.2%
Portage	1,631	1,683	1,706	1,728	1,773	1,831	1,836	1,852	1,839	1,915	1,954	19.8%
Vilas	940	970	965	963	980	1,016	1,003	999	955	977	1,022	8.7%
Wood	1,864	1,914	1,953	1,992	2,024	2,073	2,085	2,123	2,093	2,116	2,149	15.3%
<b>Region</b>	<b>11,783</b>	<b>12,043</b>	<b>12,166</b>	<b>12,255</b>	<b>12,491</b>	<b>12,787</b>	<b>12,780</b>	<b>12,868</b>	<b>12,649</b>	<b>13,086</b>	<b>13,582</b>	<b>15.3%</b>

Source: WI Dept. of Workforce Development QCEW Payroll Employment



## Business Startups and Entrepreneurship

Business startups and entrepreneurial activity can be measured by tracking the number of EIN applications. According to the Census Bureau, roughly a quarter to a third of EIN applications result in a business paying wages within a year of their EIN filing. In 2024, there were 3,885 EIN applications (business startups) within North Central Wisconsin, significantly higher than the 2,249 business startups within the Region in 2014. Over the past

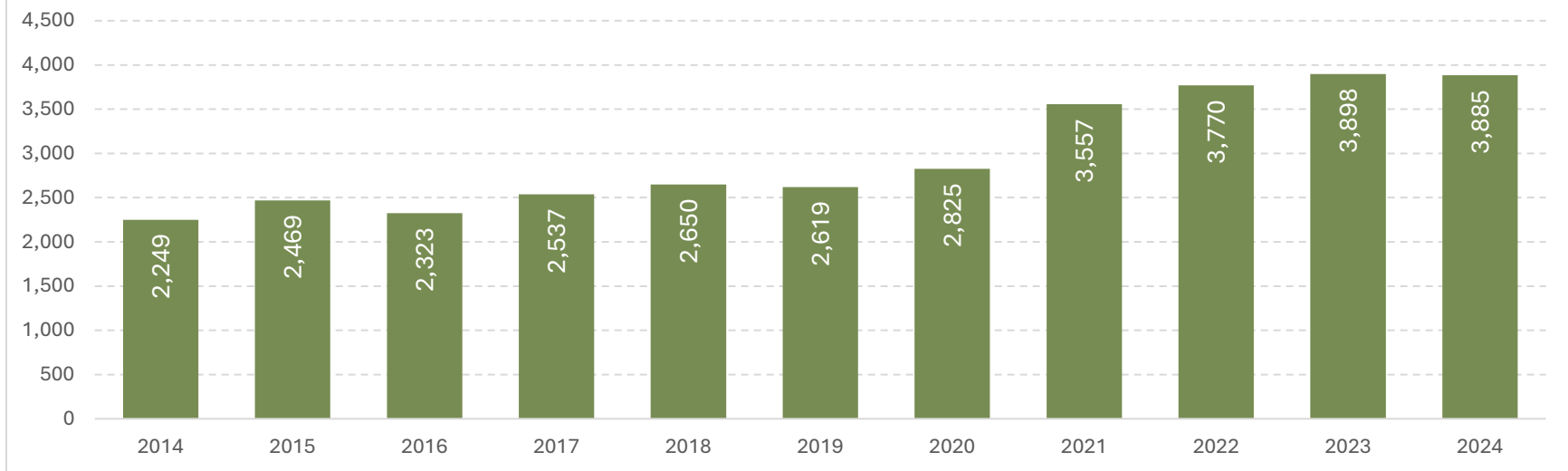
decade, there have been an average of 2,980 business startups in North Central Wisconsin per year. The number of business startups per year dramatically increased in 2021 and has stayed at that high level since. **Table 9** shows annual business startups by county, while **Figure 9** shows the number of business startups per year within the North Central Wisconsin Region.

**Table 9: Annual Business Startups**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Change
Adams	109	117	74	97	128	92	130	144	161	196	195	78.9%
Forest	53	72	58	64	56	38	65	64	84	85	90	69.8%
Juneau	128	110	139	159	192	144	154	215	219	220	232	81.3%
Langlade	107	133	123	118	109	116	100	152	176	181	191	78.5%
Lincoln	151	136	121	146	163	177	165	225	220	243	227	50.3%
Marathon	638	733	709	800	764	821	871	1,134	1,131	1,232	1,188	86.2%
Oneida	194	271	245	236	237	245	273	344	383	360	379	95.4%
Portage	365	344	324	359	424	443	481	533	574	589	565	54.8%
Vilas	168	205	176	160	191	160	177	271	280	297	286	70.2%
Wood	336	348	354	398	386	383	409	475	542	495	532	58.3%
Region	2,249	2,469	2,323	2,537	2,650	2,619	2,825	3,557	3,770	3,898	3,885	72.7%

*Source: U.S Census Bureau Business Formation Statistics*

Figure 9: Business Startups, North Central Wisconsin, 2014-2024

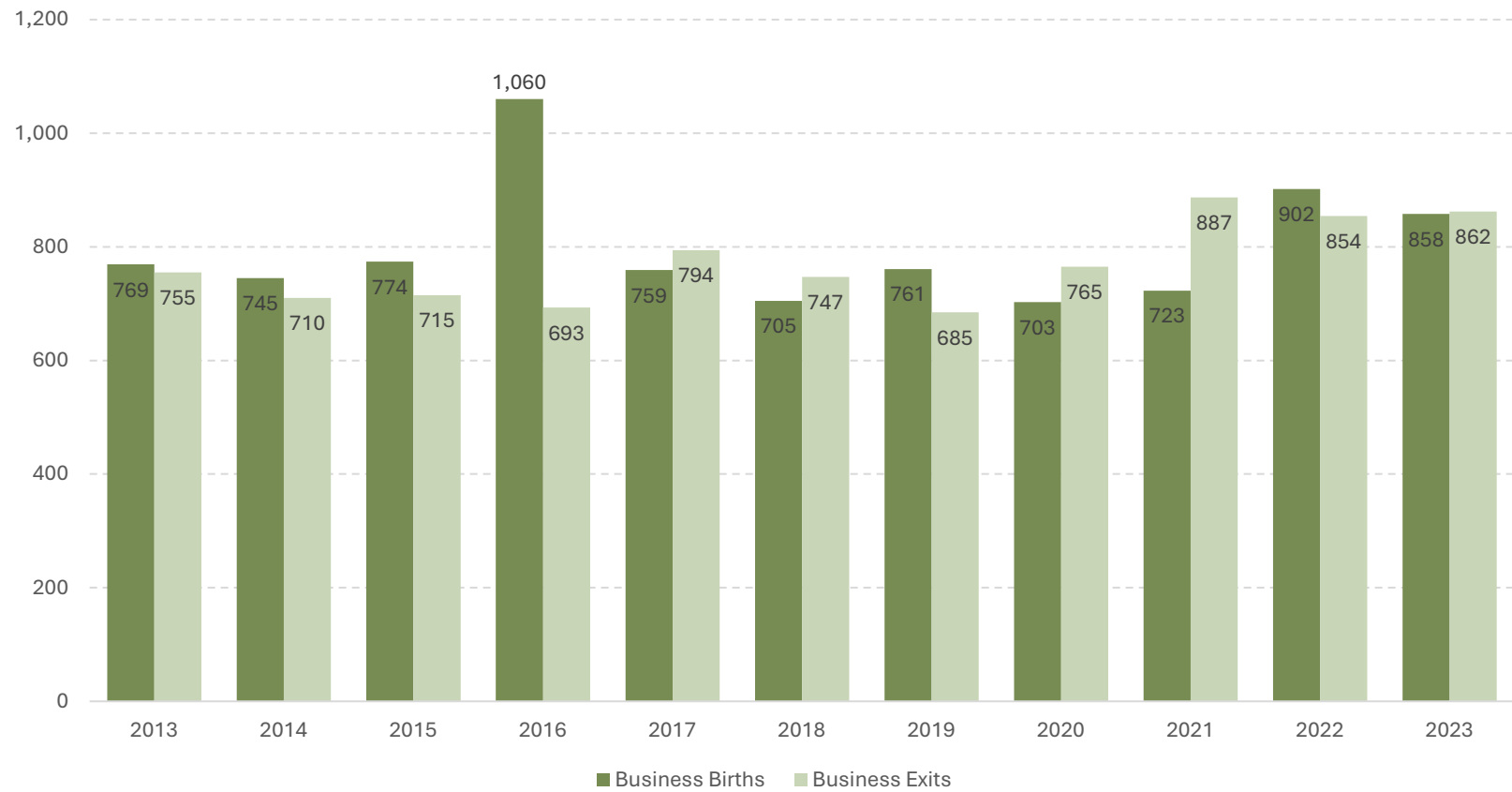


### Business Births and Exits

Generally, the overall number of business births and exits has increased in North Central Wisconsin over the past decade. **Figure 10** compares business births and exits over the past decade across North Central Wisconsin, while **Table 10** shows the number of business births and exits for each county over the past decade. Business births have generally outpaced business exits within the Region over the past decade, as the Region averaged 796 business births from 2013 to 2023 compared to 770 business exits during this time. The number of both business

births and exits within the Region has also increased over time, indicating that business activity and business churn have both increased over time. Increases in business openings and closures can be an indicator of increased economic dynamism, as more business churn can lead to increases in competition and risk-taking, leading to advances in innovation and technology. These advances often lead to wage growth and increased living standards.

Figure 10: Business Births & Deaths, North Central Wisconsin, 2013-2023



**Table 10: Business Births and Exits**

<b>Business Births</b>											
	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Adams	42	31	32	37	30	23	30	28	48	29	33
Forest	23	16	13	24	16	12	16	17	20	22	18
Juneau	25	40	55	48	39	46	44	25	28	50	42
Langlade	20	39	31	31	33	27	34	32	36	42	41
Lincoln	39	43	38	57	49	47	46	44	45	60	52
Marathon	214	180	215	301	200	196	219	192	200	235	240
Oneida	106	91	89	146	106	85	83	91	95	121	123
Portage	129	111	111	172	108	96	119	108	95	132	114
Vilas	77	76	73	93	68	76	60	61	61	86	79
Wood	94	118	117	151	110	97	110	105	95	125	116
Region	769	745	774	1,060	759	705	761	703	723	902	858
<b>Business Exits</b>											
	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Adams	31	31	24	33	28	30	32	27	37	28	39
Forest	12	18	24	18	23	20	17	21	17	17	19
Juneau	44	40	42	36	48	50	30	44	38	30	48
Langlade	33	26	33	27	33	41	25	29	39	47	31
Lincoln	41	36	40	49	51	49	42	52	49	51	49
Marathon	222	204	196	195	201	185	183	207	259	217	228
Oneida	95	88	83	79	106	98	87	95	108	111	118
Portage	104	93	108	91	110	115	104	102	141	126	110
Vilas	71	61	64	58	75	46	61	65	78	93	81
Wood	102	113	101	107	119	113	104	123	121	134	139
Region	755	710	715	693	794	747	685	765	887	854	862

*Source: U.S. Census Bureau - Business Dynamics Statistics*

## Industry

Examining employment trends by industry sector provides context on the general condition of the Regional economy and identifies the industries which are considered to be on the rise and those that are declining. Identifying the status of each industry within the Region can help determine the overall competitiveness of that industry within the Region, identify which

industries are strongest in the Region, and can help the Region better adapt to changes in industrial trends. Evaluating overall employment, wages, and concentration of employment by industry sector helps to determine the competitiveness of each industry.

### NAICS 2-Digit Employment and Average Wage

Between 2013 and 2023, ten of the Region's industry sectors increased in employment, while the other ten industry sectors experienced a decrease in employment. The Arts, Entertainment, and Recreation industry experienced the fastest growth in employment during this time, increasing by nearly 52 percent. In contrast, the Mining industry experienced the fastest decrease in employment, decreasing by over 16 percent during this time. **Table 11** shows changes in NAICS 2-Digit industry employment between 2013 and 2023.

The Manufacturing industry held the highest share of jobs among industry sectors, accounting for over 16 percent of jobs in the Region. Other major industries by employment within North Central Wisconsin include the Government, Health Care and

Social Assistance, Retail Trade, and Accommodation and Food Services industries. **Figure 11** compares the share of employment for NAICS 2-Digit industries in the Region.

Overall, the average annual wage in North Central Wisconsin was \$65,342 in 2023. The Region's average annual wage was lower than the State's average wage of \$74,101. Among industry sectors, the Utilities industry had the highest average annual wage in the Region at \$144,632, followed by the Finance and Insurance industry at \$102,214. The Accommodation and Food Services industry had the lowest average annual wage in the Region at \$24,203, followed by the Arts, Entertainment, and Recreation industry at \$25,789. **Figure 12** displays average annual wage by NAICS 2-Digit industry for the Region and Wisconsin.



**Table 11: Employment by NAICS 2-Digit Industry, North Central Wisconsin**

	<b>2013</b>	<b>2023</b>	<b>Change</b>
Agriculture	9,893	8,574	-13.3%
Mining	209	175	-16.3%
Utilities	653	691	5.8%
Construction	9,455	11,208	18.5%
Manufacturing	33,621	37,285	10.9%
Wholesale Trade	8,071	7,320	-9.3%
Retail Trade	27,339	24,924	-8.8%
Transportation and Warehousing	10,736	11,186	4.2%
Information	2,381	2,306	-3.1%
Finance and Insurance	12,183	11,756	-3.5%
Real Estate	1,576	1,913	21.4%
Professional, Scientific, and Technical Services	4,920	5,696	15.8%
Management of Companies and Enterprises	2,348	3,188	35.8%
Administrative and Support Services	5,311	6,508	22.5%
Educational Services	1,400	1,391	-0.6%
Health Care and Social Assistance	32,318	29,115	-9.9%
Arts, Entertainment, and Recreation	2,156	3,273	51.8%
Accommodation and Food Services	17,197	18,131	5.4%
Other Services (except Public Administration)	11,110	9,571	-13.9%
Government	30,983	29,559	-4.6%

*Source: Lightcast*

Figure 11: Share of Employment by NAICS 2-Digit Industry in North Central Wisconsin, 2023

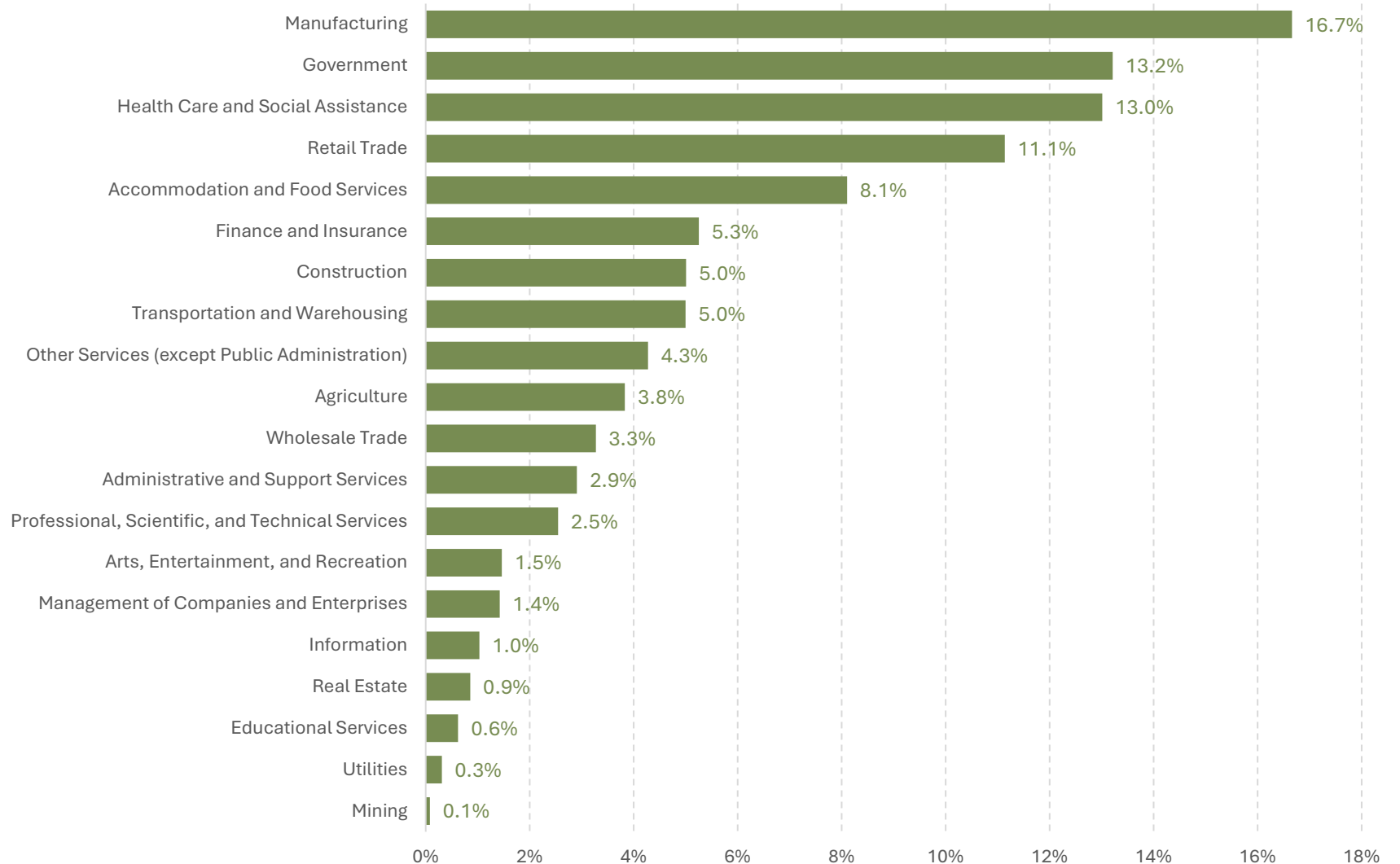
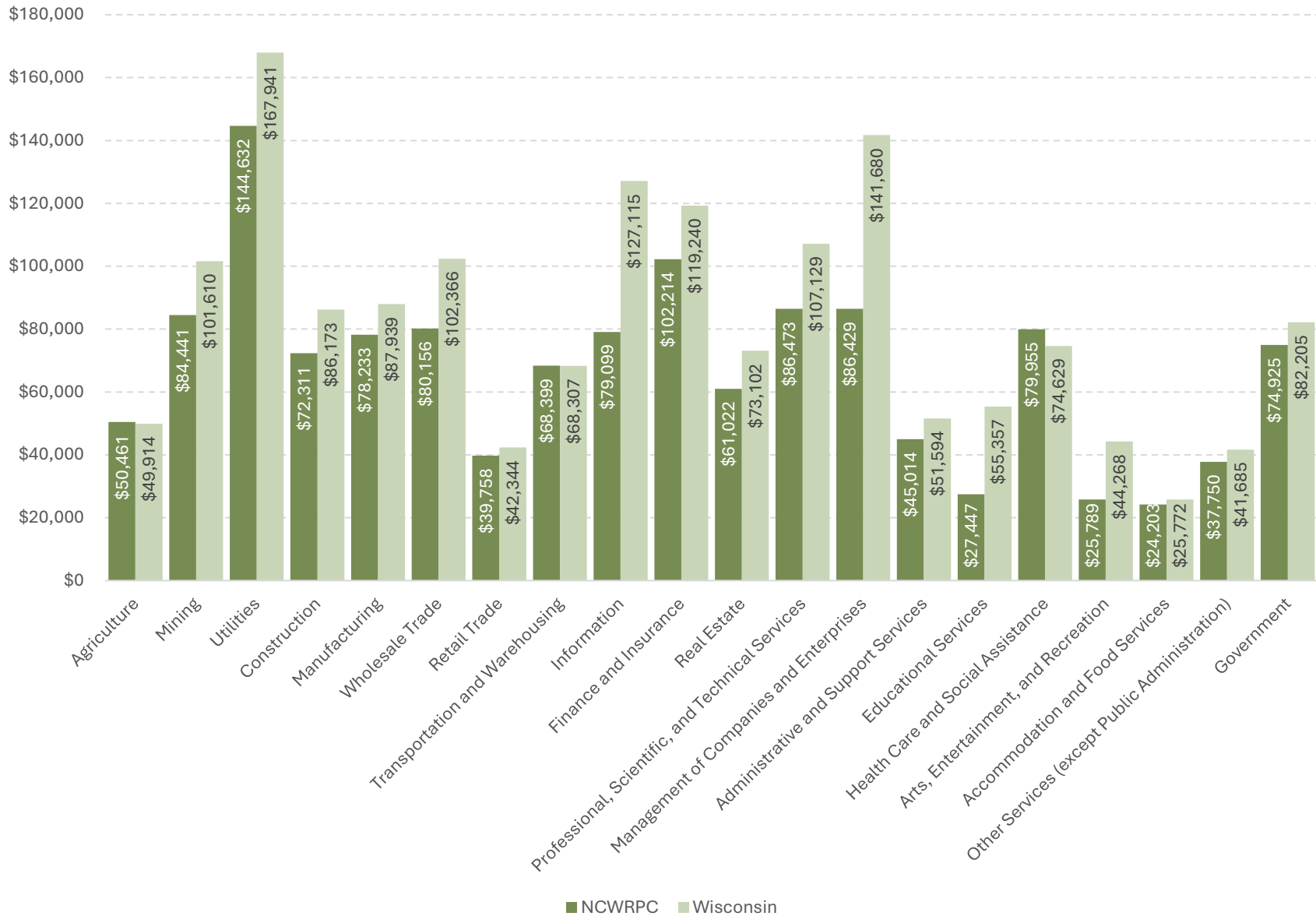


Figure 12: Average Annual Wage by NAICS 2-Digit Industry, 2023



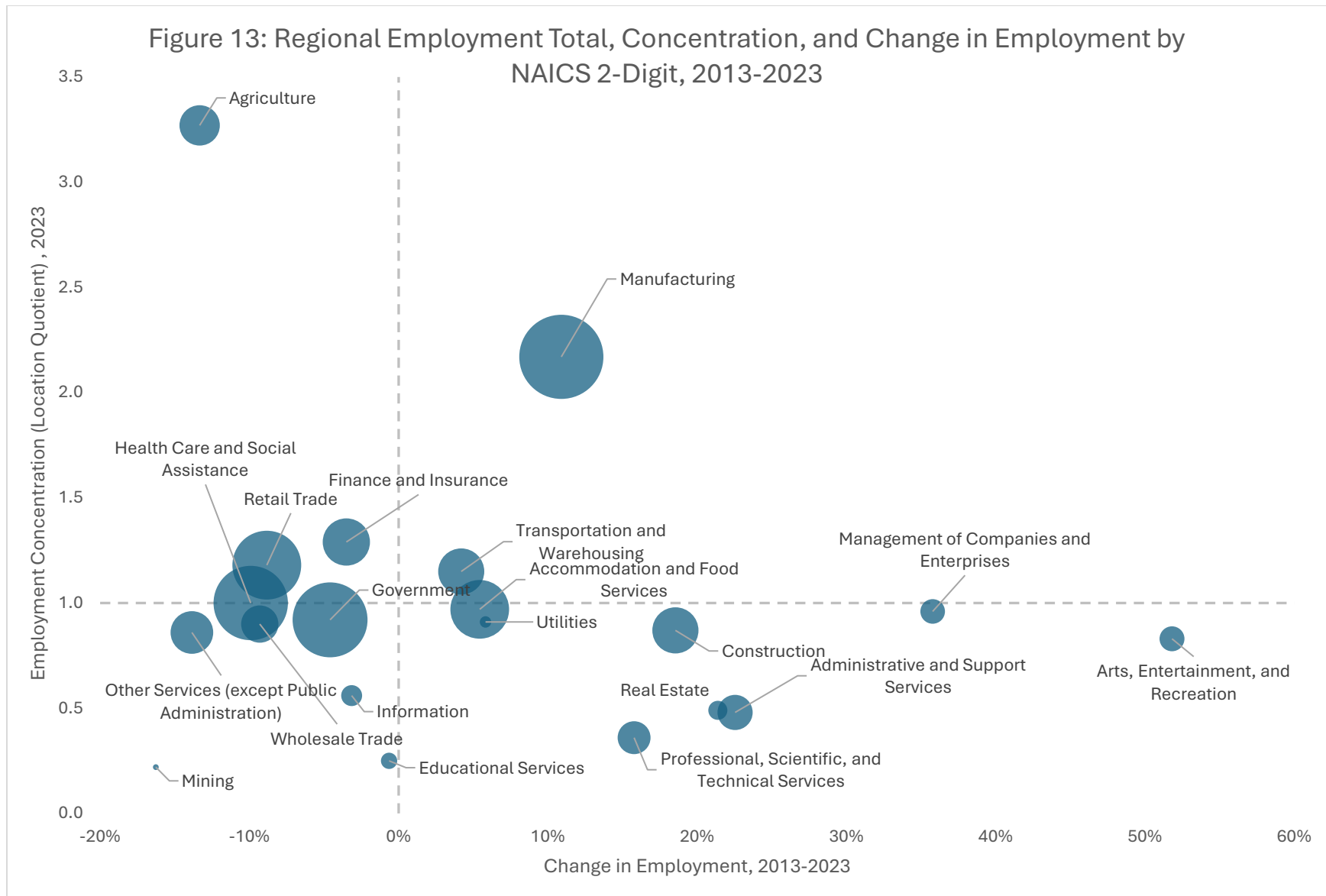
## NAICS 2-Digit Employment Concentration

Employment concentration (location quotient) quantifies how concentrated an industry is in a region compared to the nation. It can reveal what makes a particular region unique as well as its economic strengths and weaknesses. The location quotient model uses employment information for both a particular region and the nation and compares their ratios of industrial employment to total employment. Based on this information, each industry sector is assigned a numeric value called a location quotient which in turn is used identify exporter industries. Export industries are the drivers of the local economy. Any industry with a location quotient value greater than one is considered to be an exporter and the higher the location quotient, the greater the concentration of jobs. Non-exporter industries have location quotients lower than one. While non-exporter industries are less concentrated and are not major drivers of the local economy, they are important for economic diversity and possibly have the potential to grow.

The relative strength of a regional industry can be determined using a quadrant analysis. By examining the size and change over time of a location quotient value, mature, driver, troubled, and emerging industries can be identified by their quadrant position. **Figure 13** below displays a quadrant analysis using industry employment concentration on the vertical axis and the percentage change in employment from 2013 to 2023 on the horizontal axis. The size of each bubble in the figure represents the total number of workers in each respective industry.

Industries in the upper right quadrant of Figure 13 are considered driver industries, industries in the bottom right quadrant are considered emerging industries, industries in the lower left quadrant are considered troubled industries, and industries in the upper left quadrant are considered mature industries.

Figure 13: Regional Employment Total, Concentration, and Change in Employment by NAICS 2-Digit, 2013-2023



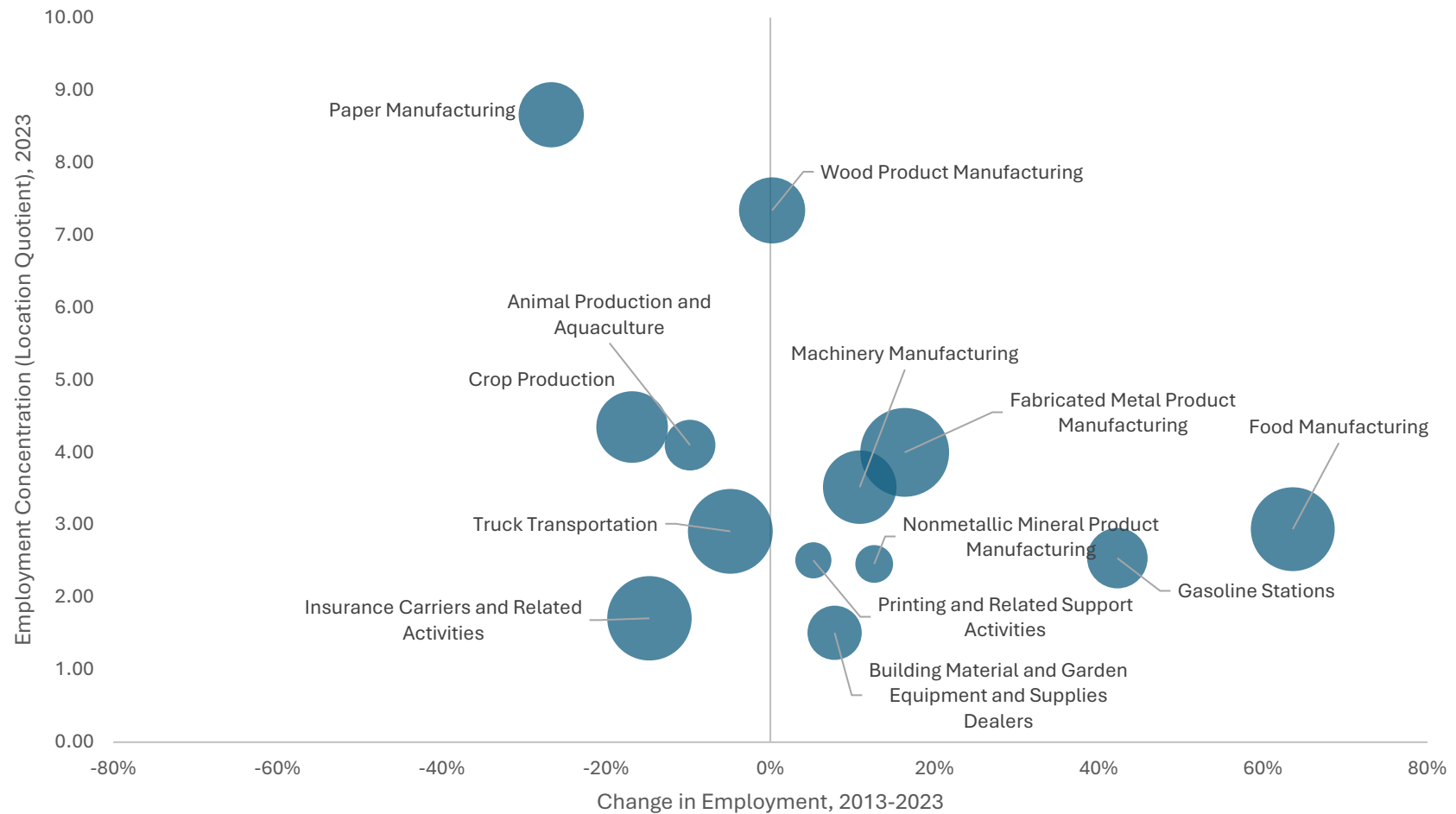
### NAICS 3-Digit Specialization and Employment Concentration

By using NAICS 3-Digit Industry data, we can identify the industry subsectors that are entrenched as or are emerging as key components of the Regional economy. These industry subsectors are those that have an employment concentration (Location Quotient) that is greater than or equal to 1.5 and where total employment is greater than or equal to 1,000. By using this criteria, thirteen industry subsectors were identified as key components of the Regional economy. These subsectors are listed to the right:

**Figure 14** displays a quadrant analysis of these thirteen subsectors, using industry subsector employment concentration on the vertical axis and the percentage change in employment from 2013 to 2023 on the horizontal axis. The size of each bubble in the figure represents the total number of workers in each respective industry subsector.

- Paper Manufacturing (Employment: 4,125)
- Wood Product Manufacturing (Employment: 4,238)
- Crop Production (Employment: 4,970)
- Animal Production and Aquaculture (Employment: 2,491)
- Fabricated Metal Product Manufacturing (Employment: 7,648)
- Machinery Manufacturing (Employment: 5,238)
- Food Manufacturing (Employment: 6,819)
- Truck Transportation (Employment: 6,970)
- Gasoline Stations (Employment: 3,542)
- Printing and Related Support Activities (Employment: 1,267)
- Nonmetallic Mineral Product Manufacturing (Employment: 1,381)
- Insurance Carriers and Related Activities (Employment: 6,905)
- Building Material and Garden Equipment and Supplies Dealers (Employment: 2,853)

Figure 14: Regional Employment Total, Concentration, and Change in Employment by Specialized NAICS 3-Digit (LQ > 1.5 and Employment > 1,000), 2013-2023



## Occupation

Examining trends in occupational employment and wages helps to identify the occupations that are most attractive to prospective workers, and the occupations that are faltering within the Region. Identifying occupations that are attractive to prospective workers can help guide the educational programming that is offered to students in the Region, attract employers based in these occupations to the Region, and ultimately attract workers to the

Region. Meanwhile, identifying the faltering occupations within the Region that are major sources of employment can lead to efforts to increase the competitiveness of these occupations as changes to the economy and worker preferences take place over time. Examining the changing trends in employment and trends can help identify the opportunities and challenges facing the Region and its employers and workers.

## SOC High-Level Employment

SOC High-Level groups occupations into six major occupational groups: Management, Business, Science, and Arts occupations; Production, Transportation, and Material Moving occupations; Sales and Office occupations; Service occupations; Natural Resources, Construction, and Maintenance occupations; and Military Specific occupations. These occupational groups are grouped together because they share common characteristics such as work performed. This means that skills are more easily

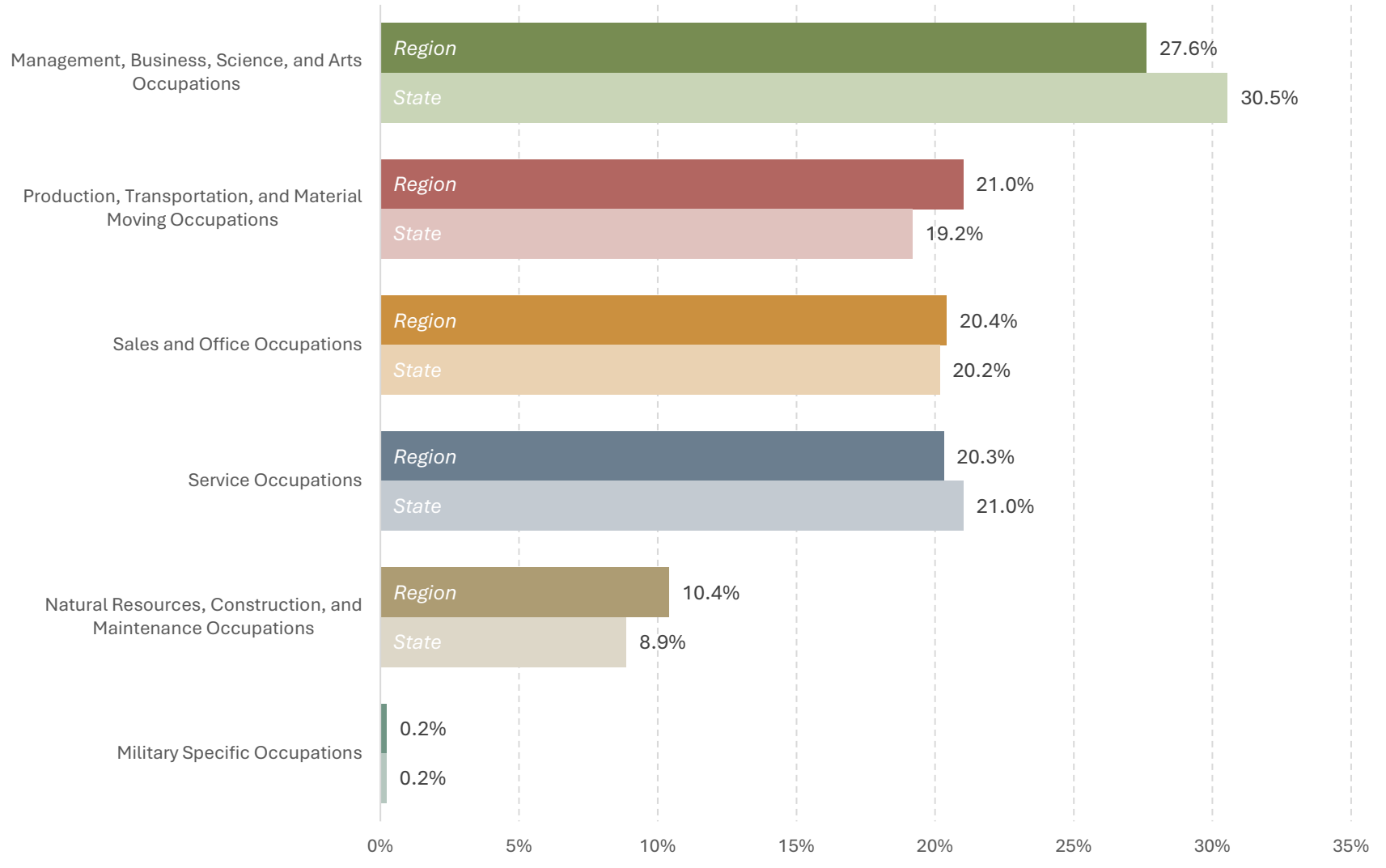
transferred across jobs within these high-level occupational groups.

In 2023, Management, Business, Science and Arts occupations accounted for over 27 percent of total employment within North Central Wisconsin, compared to over 30 percent in Wisconsin.

**Figure 15** shows the share of employment by SOC High-Level group for the Region and State in 2023.



Figure 15: Share of Employment by SOC High-Level, 2023



## SOC 2-Digit Employment and Average Wage

SOC occupation groups can be broken down further into 23 major occupation groups. These are commonly known as the SOC 2-Digit occupation groups. In 2023, the largest occupations by employment within North Central Wisconsin were the Office and Administrative Support, Production, and Transportation and Material Moving occupations. Transportation and Material Moving occupations experienced a growth in employment between 2013 and 2023, while Office and Administrative Support occupations and Production occupations both experienced a decrease in employment during this time.

Overall, 13 occupation groups experienced an increase in employment between 2013 and 2023, while 10 occupation groups experienced a decrease in employment. Business and Financial occupations experienced the fastest growth in employment (25.9 percent) between 2013 and 2023, followed by Computer and Mathematical occupations (19.1 percent) and Construction and Extraction occupations (12.3 percent). Military-Only occupations experienced the fastest decrease in employment (20.2 percent) during this time, followed by Personal Care and Service occupations (16.5 percent) and Office and Administrative Support occupations (15.4 percent).

**Table 12** shows changes in Regional employment by occupation between 2013 and 2023, while **Figure 16** shows Regional employment by occupation group in 2023.

In 2023, Management occupations had the highest median annual wage in North Central Wisconsin at \$83,965, followed by

Computer and Mathematical occupations at \$78,753 and Healthcare Practitioners and Technical occupations at \$78,588. Food Preparation and Serving Related occupations had the lowest median annual wage in the Region at \$28,240, followed by Farming, Fishing, and Forestry occupations at \$31,290 and Personal Care and Service occupations at \$31,560.

**Figure 17** shows median wage by occupation group for the Region in 2023.

A noticeable trend in regard to occupational employment and wages is that the occupation groups with low median annual wages experience more volatility in employment than the occupation groups with high median annual wages. For example, of the eleven occupation groups with a median annual wage below \$50,000, six occupation groups experienced decreases in employment between 2013 and 2023. Of the twelve occupation groups with a median annual wage above \$50,000, only four occupation groups experienced a decrease in employment.

**Figure 18** compares the total employment, change in employment, and median wage among occupation groups in 2023. Bubble size represents total employment, while the change in employment is graphed on the horizontal axis and median wage is graphed on the vertical axis. Generally speaking, occupation groups closer to the top right are those that are faring well and those that are closer to the bottom left are those that are faltering. Looking at the bubble size can help prioritize which occupation groups to further support.

Table 12: Changes in Regional Employment by Occupation			
SOC 2-Digit Occupation Group	2013	2023	Change
Office and Administrative Support	30,556	25,841	-15.4%
Production	25,314	24,502	-3.2%
Transportation and Material Moving	20,831	22,516	8.1%
Sales and Related	20,582	19,848	-3.6%
Food Preparation and Serving Related	16,156	16,995	5.2%
Management	13,959	14,712	5.4%
Healthcare Practitioners and Technical	13,571	13,160	-3.0%
Business and Financial	8,954	11,271	25.9%
Educational Instruction and Library	10,948	10,903	-0.4%
Installation, Maintenance, and Repair	9,521	9,970	4.7%
Construction and Extraction	8,874	9,962	12.3%
Healthcare Support	9,812	9,279	-5.4%
Building and Grounds Cleaning and Maintenance	7,159	7,248	1.2%
Personal Care and Service	5,243	4,378	-16.5%
Computer and Mathematical	3,421	4,073	19.1%
Community and Social Service	3,585	3,827	6.8%
Protective Service	3,607	3,724	3.2%
Farming, Fishing, and Forestry	3,827	3,353	-12.4%
Architecture and Engineering	2,610	2,789	6.9%
Arts, Design, Entertainment, Sports, and Media	2,361	2,487	5.3%
Life, Physical, and Social Science	1,386	1,502	8.4%
Legal	937	906	-3.3%
Military-only	652	520	-20.2%

Source: Lightcast

Figure 16: Regional Employment by SOC 2-Digit

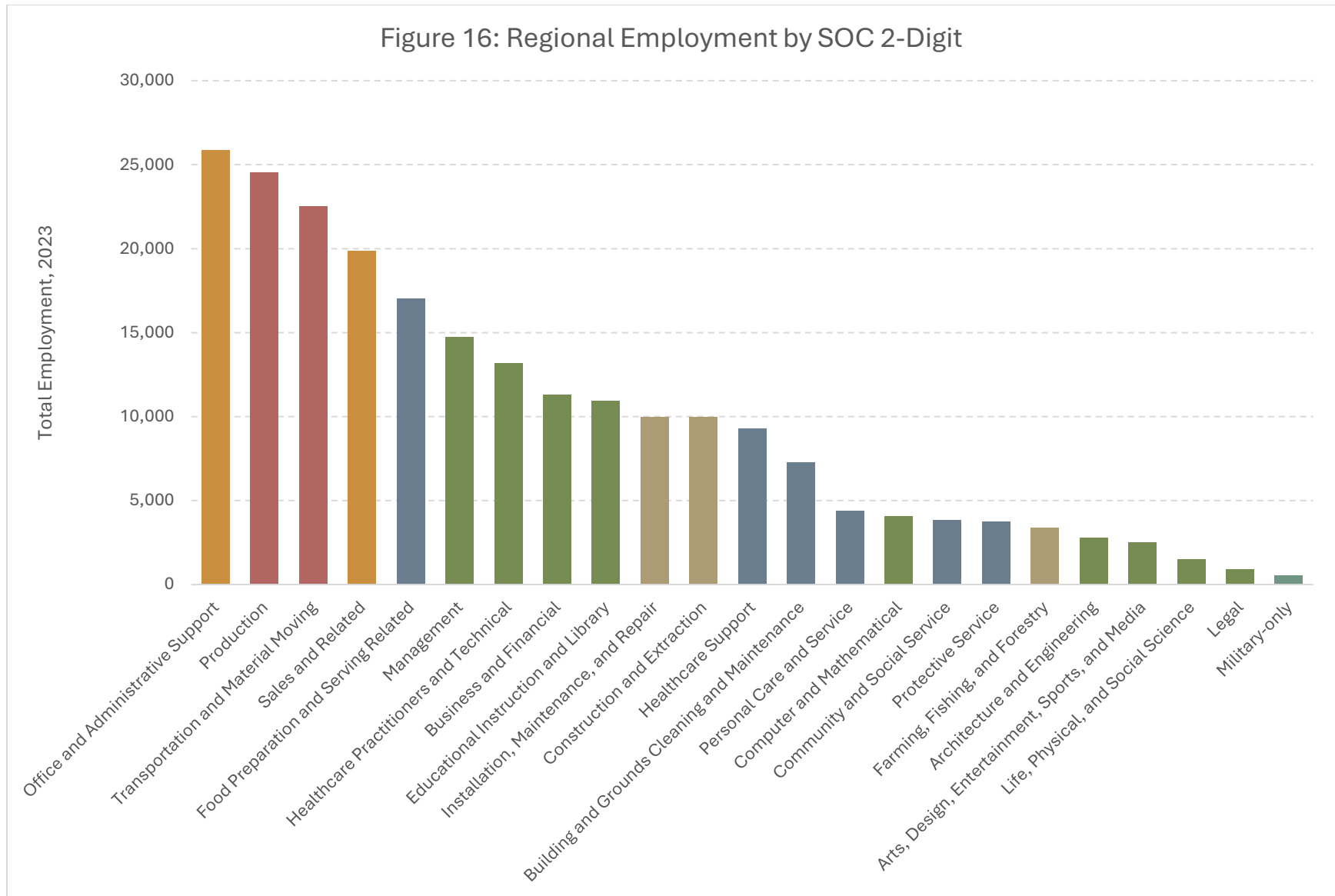


Figure 17: Regional Median Annual Wage by SOC 2-Digit

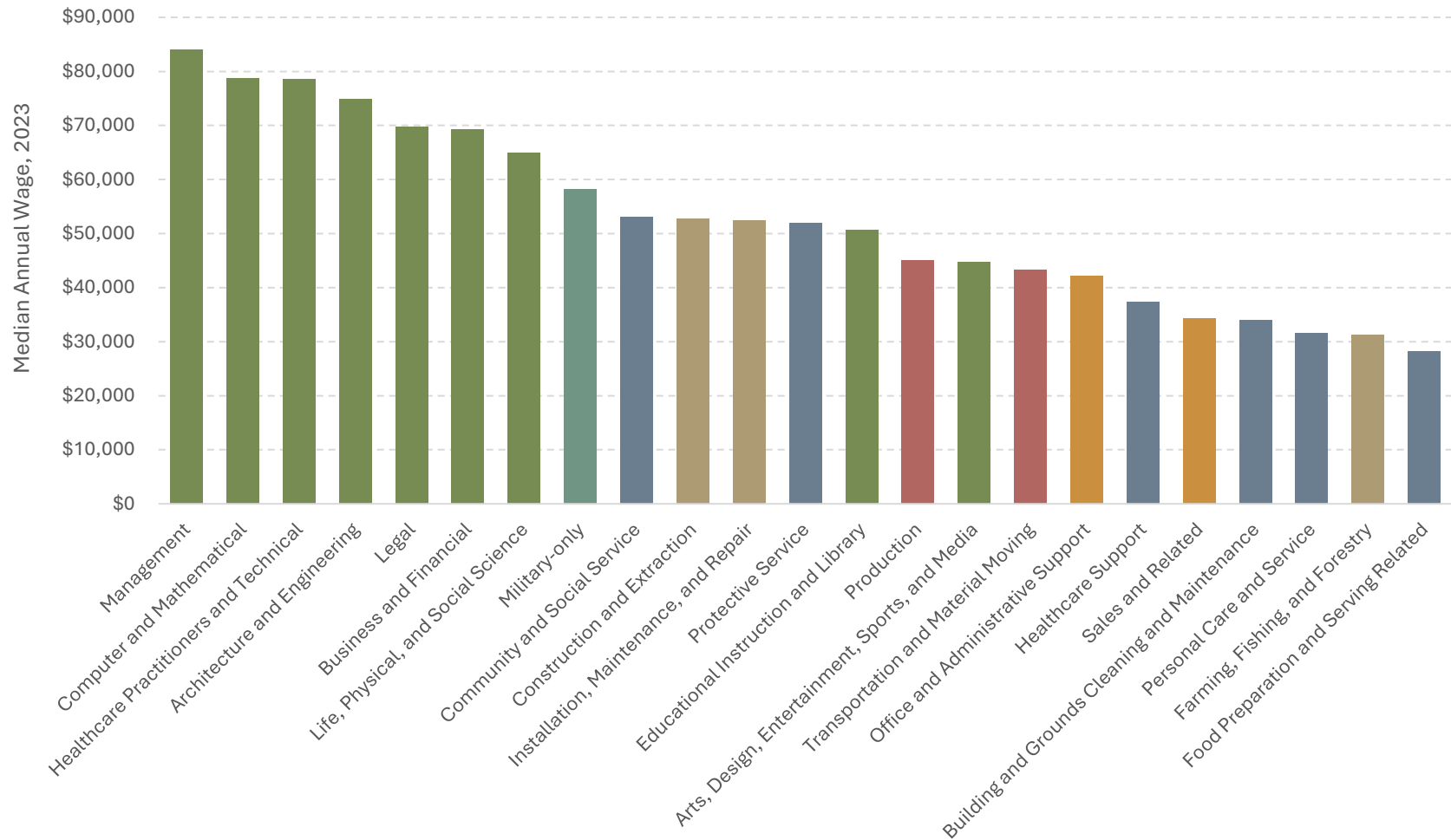
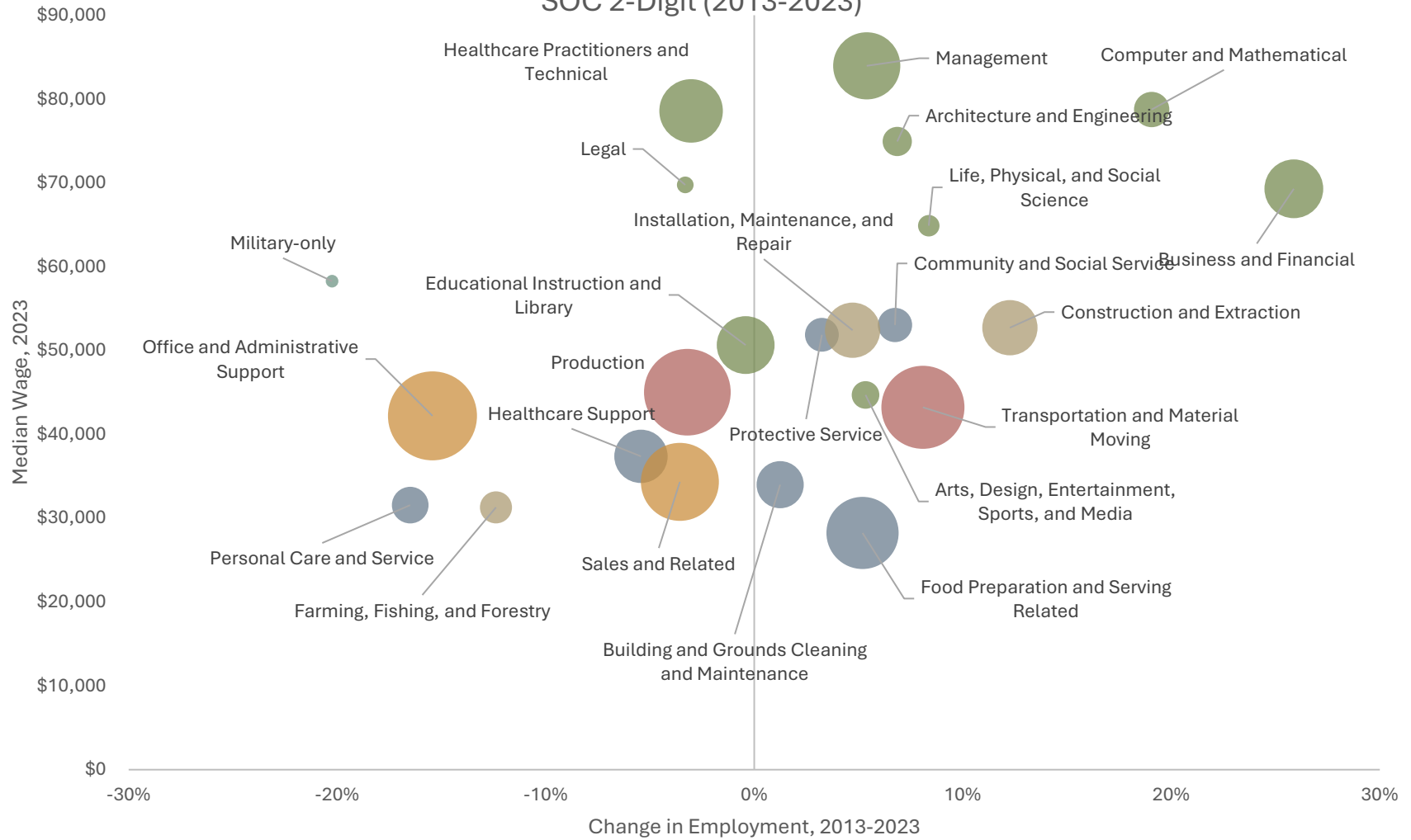
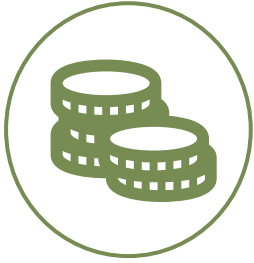


Figure 18: Regional Employment Total, Median Wage, and Change in Employment by SOC 2-Digit (2013-2023)



# Chapter 3 – Economic Conditions



## Income & Poverty

- Median Household Income
- Income Distribution
- Poverty Rate
- Poverty Rate by Race



## Broadband

- Broadband Access
- Broadband Subscription Rate



## Gross Regional Product (GRP)

- GRP & Employment

## Tourism

- Total Economic Impact
- Direct Visitor Spending
- Tourism Supported Jobs



## Housing

- Monthly Housing Cost Distribution
- Monthly Housing Cost Burden
  - Housing Sales Trends
- Median Home Sale Price



## Income and Poverty

Examining trends in income and poverty rate data provides an indication of the economic health of the Region and its communities. Comparing changes in income levels can help provide context into whether residents are becoming more or less economically well-off over time compared to other counties, the Region as a whole, and to the State. Examining poverty rates can help identify the proportion of the population living below the poverty threshold and which populations are most affected by poverty.

### Median Household Income

The North Central Wisconsin Region had a median household income of \$69,814 in 2023, which was lower than the State's median household income of \$75,670. Marathon County had the highest median household income (\$76,185) within the Region, while Langlade County had the lowest median household income (\$57,258) within the Region. **Figure 19** shows median household incomes within the North Central Wisconsin Region in 2023. All ten counties in the North Central Wisconsin Region experienced an increase in median household income between 2013 and

Two measures of income levels are examined below: median household income and income distribution. Income levels in the North Central Wisconsin Region are typically lower on average than they are in the State of Wisconsin as a whole and have generally increased at a slower pace over the past decade as well.

Poverty is examined by measuring the percentage of the population that is living below the Federal Poverty Level, which is set by the Department of Health and Human Services and varies by household size. In general, poverty levels are slightly lower in the Region than they are Statewide.

2023, with Vilas County experiencing the fastest growth (26.5 percent) and Adams County experiencing the slowest growth (1.4 percent) during this time. Overall, three counties within the Region experienced a faster growth in household income than the State, while the Region as a whole experienced a slightly slower growth in household income than the State. **Figure 20** shows percent change in median household income from 2013-2023 among counties within the Region.



Figure 19: Median Household Income by County, 2023

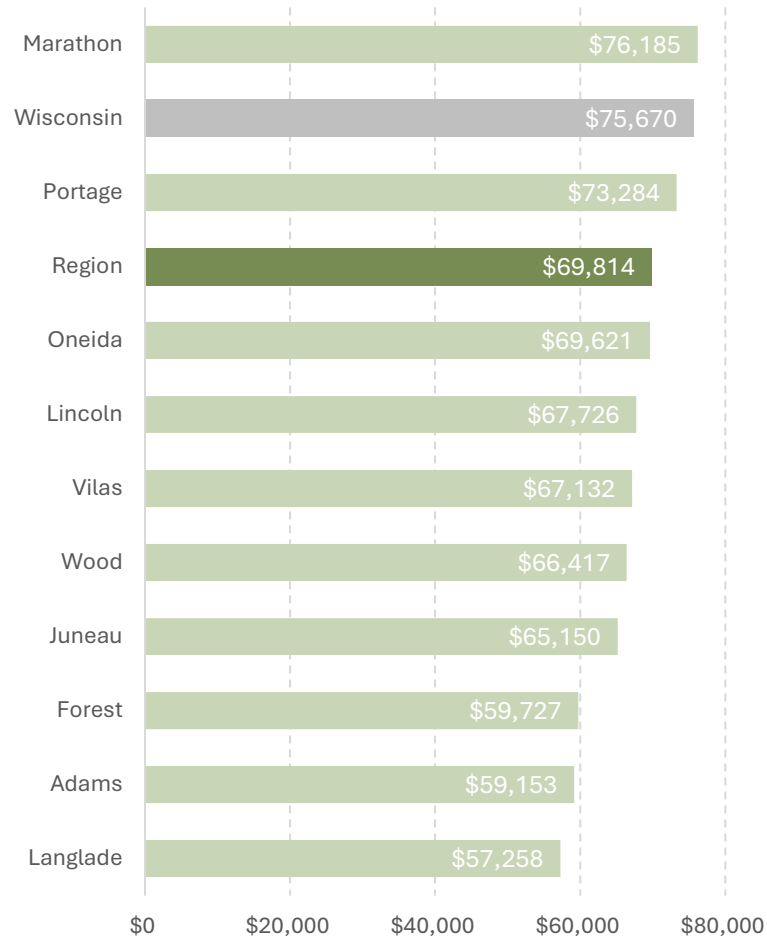
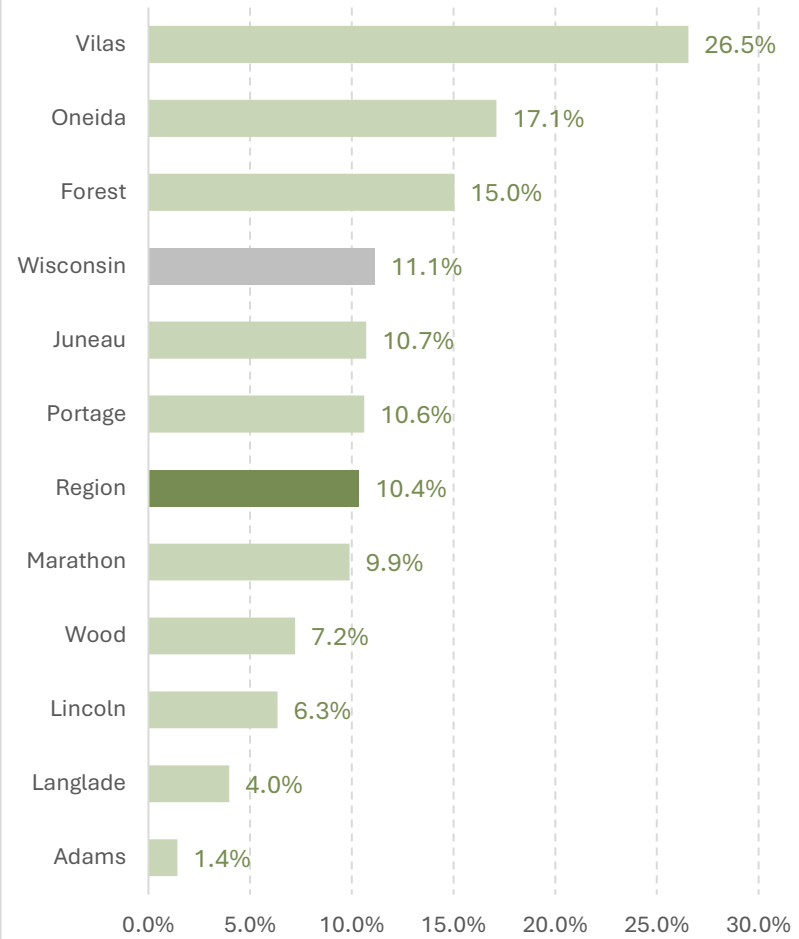


Figure 20: Change in Median Household Income by County, 2013-2023



## Income Distribution

Examining income distribution across the Region can help to better understand the Region's economic landscape and how different groups are faring. Income distribution within the North Central Wisconsin Region skewed more towards the lower income ranges than in the State of Wisconsin, as shown in **Figure 21**.

In the North Central Wisconsin Region:

- 14% of the regional population had an income less than \$25,000
- 21% between \$25,000 and \$50,000
- 19% between \$50,000 and \$75,000
- 15% between \$75,000 and \$100,000
- 31% of individuals had an income greater than \$100,000

## Poverty Rate

In 2023, the North Central Wisconsin Region had a poverty rate of 10.3 percent, slightly lower than the State's poverty rate of 10.6 percent. Across the Region, poverty rates ranged from a high of 15 percent in Forest County to a low of 8.2 percent in Oneida County in 2023. **Figure 22** displays poverty rates across the Region. Poverty rates have generally decreased over the past decade throughout the Region, as only two counties (Adams and Juneau) experienced an increase in poverty rate between 2013 and 2023.

Income distribution was mostly similar across the Region across these brackets. Most counties had a higher distribution of individuals earning less than \$25,000 than the Region, while only Marathon, Portage, and Oneida Counties had a higher distribution of individuals earning more than \$100,000 than the Region.

**Figure 23** compares the poverty rate of households by race in the North Central Wisconsin Region as a whole. Poverty rates in households which identified as American Indian, Some Other Race, Black or African American, Hispanic or Latino, Two or More Races, or as Asian all experienced poverty at a higher rate than the Regional and State overall poverty rates. Within the North Central Wisconsin Region, only households identifying as Native Hawaiian and Other Pacific Islanders or as White alone experienced poverty at a lower rate than the Regional and State overall poverty rates.

Figure 21: Income Distribution by County, 2023

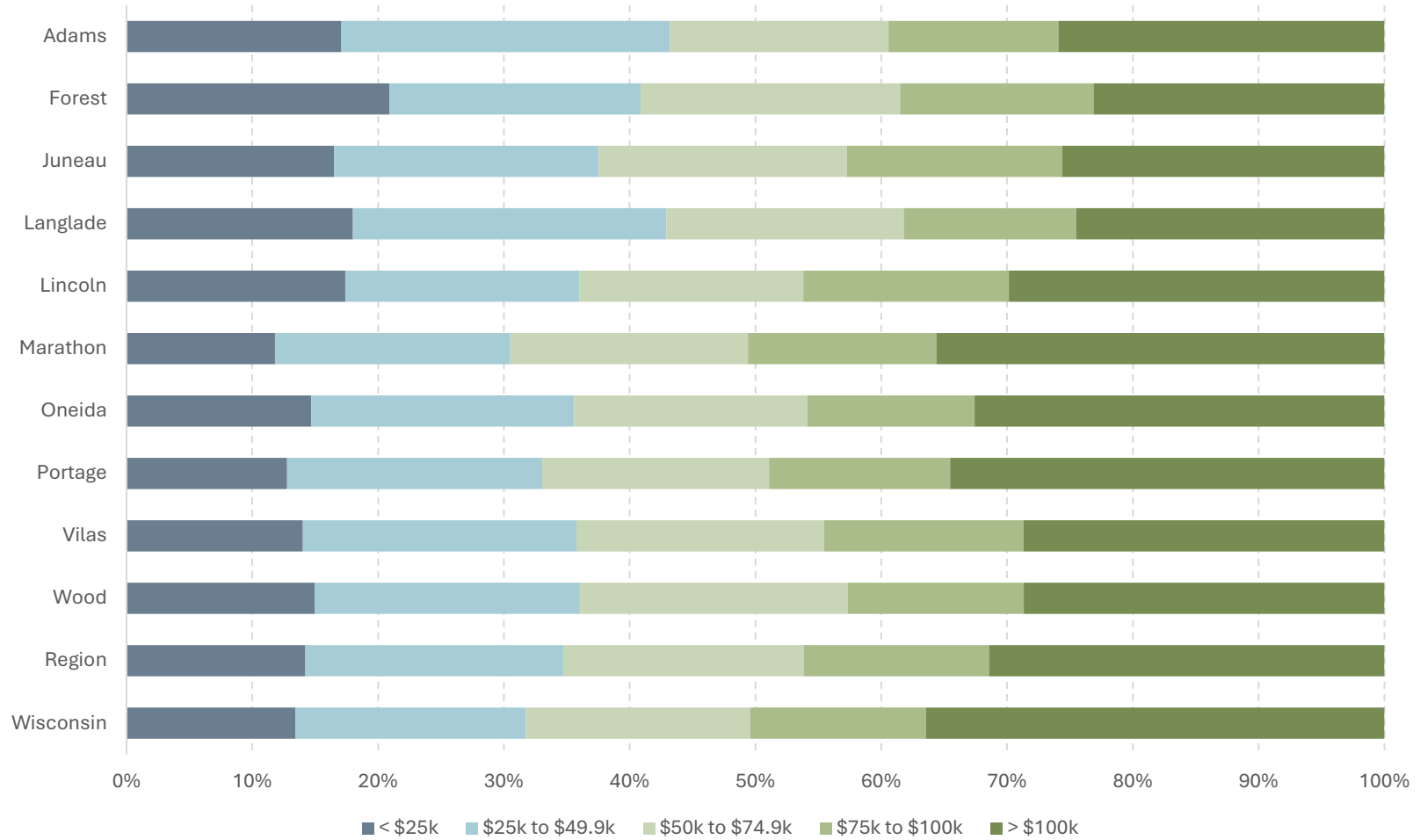


Figure 22: Poverty Rate by County, 2013-2023

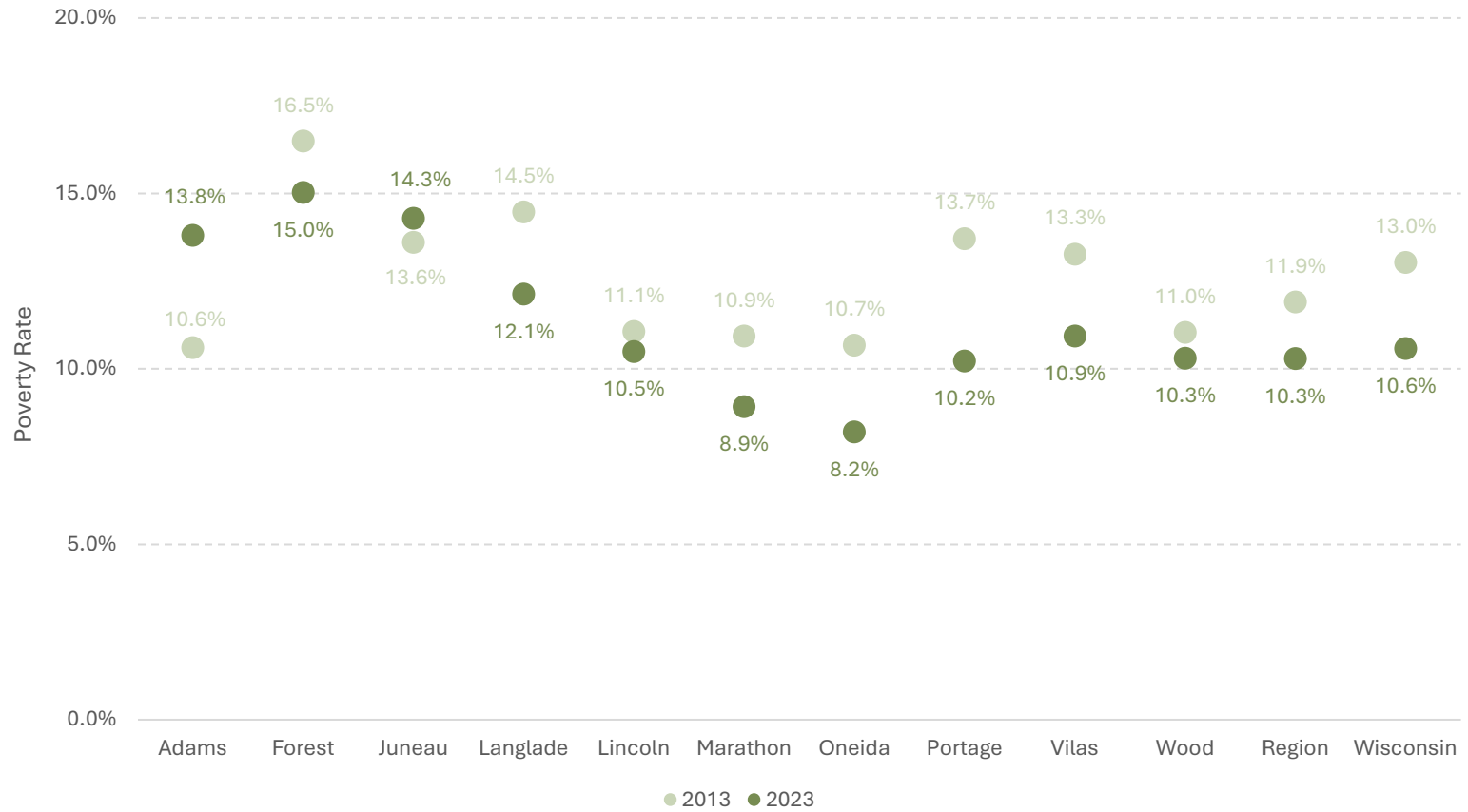
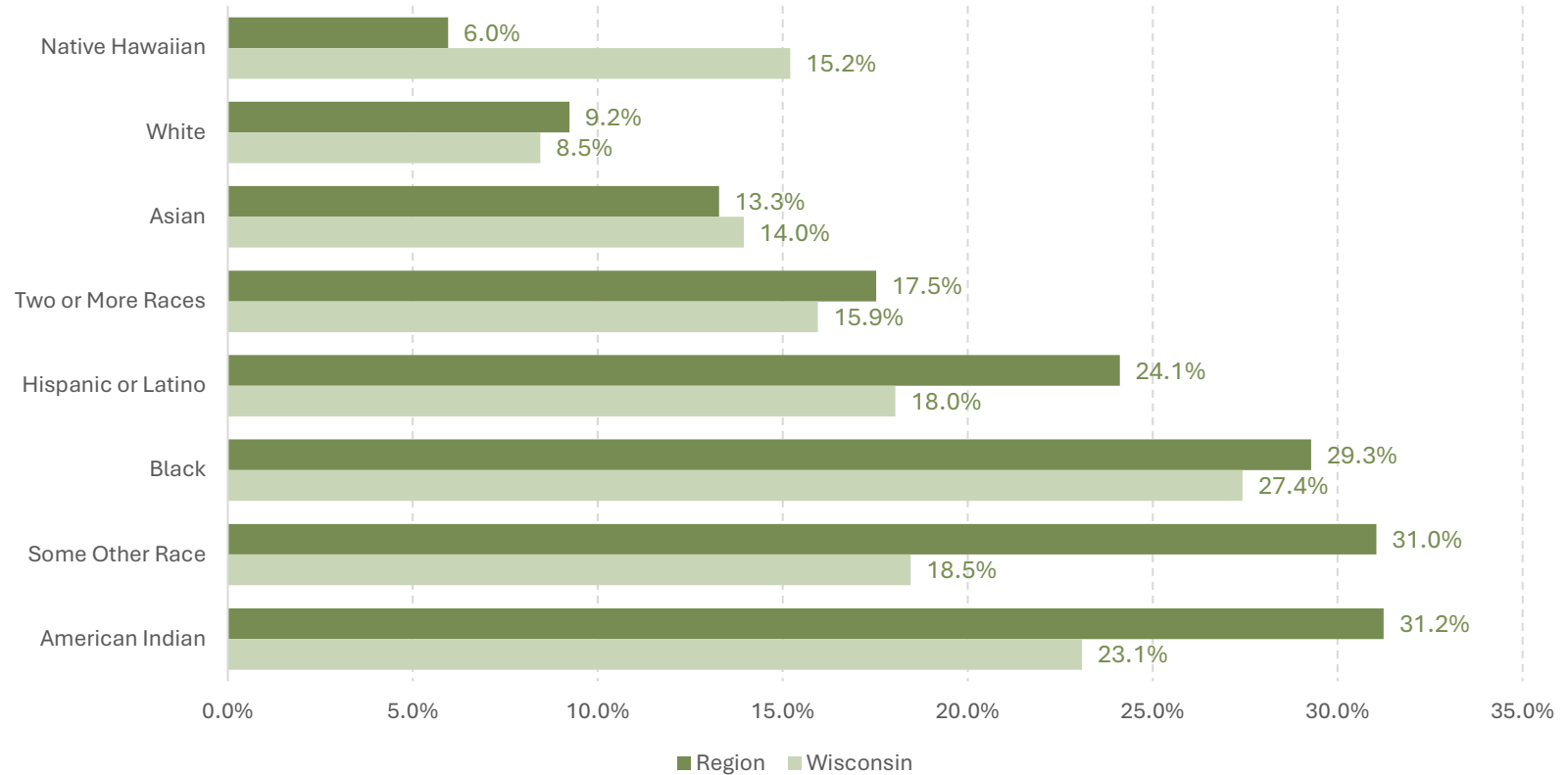


Figure 23: Poverty Rate by Race, 2023



## Tourism

Tourism has a significant impact on the Regional economy, as thousands of visitors travel to North Central Wisconsin to take advantage of the Region's bountiful supply of outdoor recreation amenities such as access to lakes, forests, and trail networks. These visitors help stimulate the local economy by supporting local businesses, particularly those in the hospitality industry such as hotels, restaurants, and bars. This support of local businesses helps support local jobs as well, making the tourism industry an important factor in employment throughout the Region. The tourism industry also impacts housing throughout the Region, as seasonal housing comprises over one-fifth of the regional housing stock, while accounting for nearly half of the housing stock in Adams, Forest, Oneida, and Vilas Counties.

According to the Wisconsin Department of Tourism, the tourism industry had a total economic impact of over \$2.36 billion in North Central Wisconsin in 2024. **Table 13** shows the total economic impact of the tourism industry throughout North Central Wisconsin. The economic impact of the tourism industry can also be further examined in several areas. Direct visitor spending helps to identify the direct impact that tourism has on local businesses and economies. The proportion of jobs supported by the Tourism industry highlights the significant impact that the tourism industry has on employment for the Region.

Table 13: Total Economic Impact of Tourism (2024)	
County	Economic Impact (\$)
Adams	\$267,280,224
Forest	\$24,630,099
Juneau	\$118,143,039
Langlade	\$84,113,716
Lincoln	\$112,850,383
Marathon	\$496,775,483
Oneida	\$393,870,744
Portage	\$269,465,036
Vilas	\$382,523,327
Wood	\$218,221,008
Region	\$2,367,873,059
Wisconsin	\$25,819,146,031

*Source: Wisconsin Department of Tourism*

## Direct Visitor Spending

Direct visitor spending is the amount of money that visitors spend while visiting or passing through their destination. Direct visitor spending is spread across five sectors: Lodging, Food & Beverage, Retail, Transport, and Recreation. According to the Wisconsin Department of Tourism, direct visitor spending within the North Central Wisconsin Region totaled over \$1.58 billion in 2024, up from over \$1.38 billion in 2019. **Table 14** shows trends in direct visitor spending between 2019 and 2024. Most counties within North Central Wisconsin experienced significant growth in direct

visitor spending during this time, while only Adams County experienced a decrease in direct visitor spending. The decrease in Adams County is mostly due to a larger initial decrease in visitor spending due to the pandemic in Adams County, as Adams County has experienced increases in visitor spending in each year following 2020. Overall, direct visitor spending increased by about 14 percent in the North Central Wisconsin Region between 2019 and 2024, a slightly lower growth than the State's direct visitor spending growth during this time.

**Table 14: Direct Visitor Spending Trends (2019-2024)**

County	2019	2024	Percent Change
Adams	\$213,273,392	\$196,846,919	-7.7%
Forest	\$14,353,346	\$15,367,610	7.1%
Juneau	\$71,411,346	\$84,333,494	18.1%
Langlade	\$48,829,318	\$58,197,656	19.2%
Lincoln	\$60,605,044	\$74,405,504	22.8%
Marathon	\$258,008,621	\$282,157,826	9.4%
Oneida	\$241,139,131	\$302,829,362	25.6%
Portage	\$137,467,984	\$152,277,587	10.8%
Vilas	\$241,226,306	\$302,634,802	25.5%
Wood	\$100,158,628	\$115,490,799	15.3%
Region	\$1,386,473,116	\$1,584,541,561	14.3%
Wisconsin	\$13,667,778,544	\$16,252,460,164	18.9%

Source: Wisconsin Department of Tourism

## Jobs Supported by Tourism

Tourism significantly impacts employment in North Central Wisconsin. In 2024, the tourism industry directly or indirectly supported 15,757 jobs within North Central Wisconsin, ultimately supporting over seven percent of all jobs within the Region. **Table 15** shows the number of jobs supported by tourism in the Region, while **Figure 24** compares the proportion of jobs supported by tourism throughout the Region. Tourism's impact on employment is especially significant in Vilas, Adams, and Oneida Counties, as over 12 percent of jobs in each of these counties are supported by tourism. The COVID-19 pandemic significantly disrupted the tourism industry and led to a drastic decrease in the number of jobs supported by tourism in 2020.

In 2024, the tourism industry generated over \$531 million in labor income within North Central Wisconsin, accounting for nearly five percent of all income earned within the Region. This is a higher percentage than in Wisconsin, where tourism employment accounted for about four percent of total earnings. The percentage of total earnings generated by tourism was highest in Adams and Vilas Counties, where tourism generated about 30 percent and 17 percent of all earnings respectively. **Figure 25** displays the percentage of earnings generated by tourism.

**Table 15: Jobs Supported by Tourism**

	2019	2020	2021	2022	2023	2024	Percent Change (2019-2024)
Adams	2,205	1,458	1,578	1,534	1,586	1,661	-24.7%
Forest	226	187	210	194	192	186	-17.6%
Juneau	763	677	744	731	722	710	-7.0%
Langlade	479	414	441	425	425	435	-9.1%
Lincoln	738	631	659	658	665	671	-9.1%
Marathon	4,242	3,371	3,474	3,483	3,574	3,617	-14.7%
Oneida	2,255	1,947	2,131	2,125	2,144	2,220	-1.6%
Portage	2,310	1,753	1,828	1,916	1,964	2,013	-12.9%
Vilas	2,079	1,926	2,162	2,109	2,138	2,105	1.2%
Wood	2,292	2,046	2,130	2,121	2,120	2,139	-6.7%
Region	17,590	14,411	15,355	15,297	15,530	15,757	-10.4%
Wisconsin	202,217	157,332	169,707	174,623	178,045	181,898	-10.0%

*Source: Wisconsin Department of Tourism*



Figure 24: Proportion of Jobs Supported by Tourism, 2024

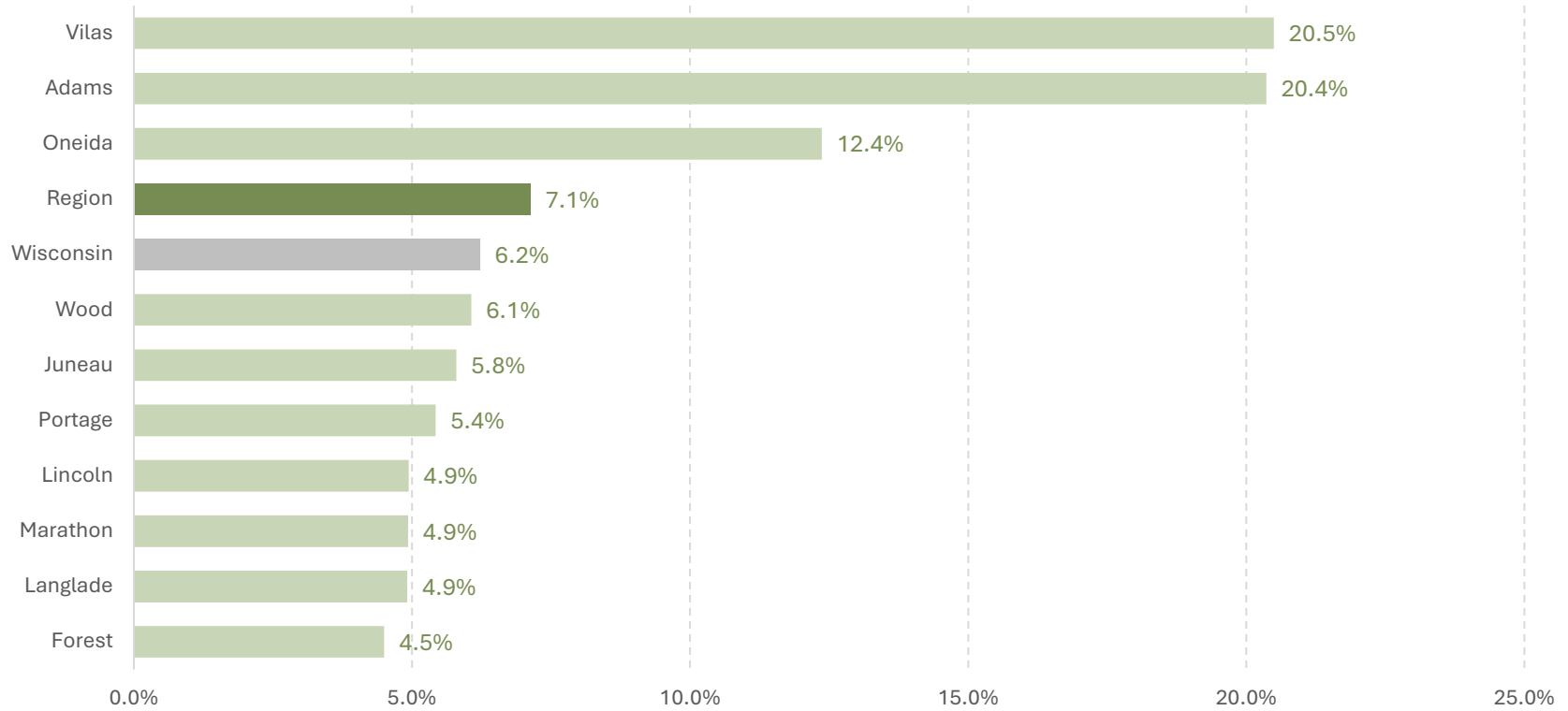
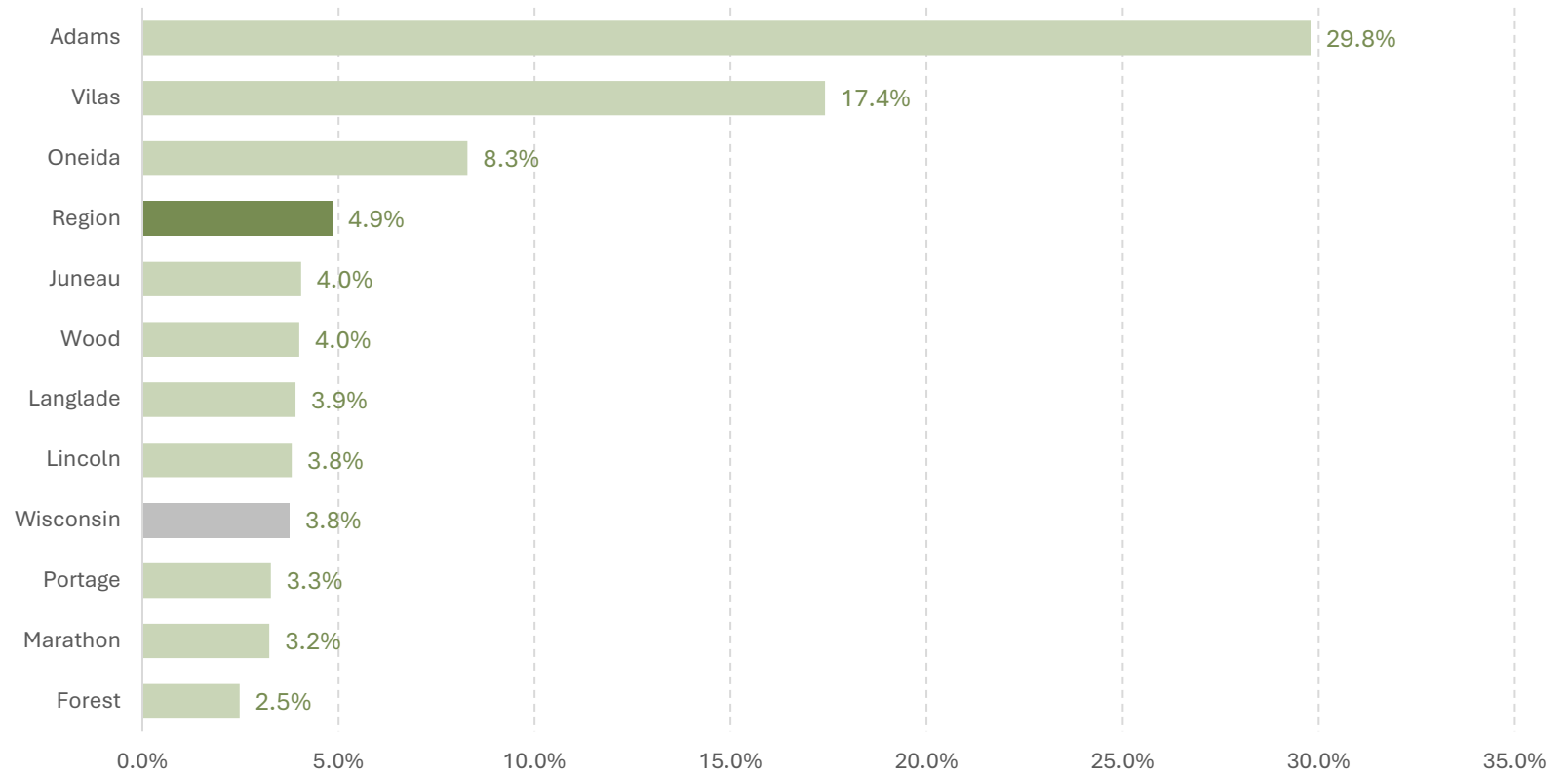


Figure 25: Percentage of Earnings Generated by Tourism, 2024



## Housing

Housing and economic development are interrelated. Housing helps to spur economic growth by improving the ability of communities to attract and retain residents. This has numerous benefits on the local and regional economies, such as increased local spending, a larger talent pool available to employers, and job creation. These factors make the provision of an adequate supply of housing that is attainable for a wide spectrum of income groups essential for the economic prosperity of the Region and its communities.

### Monthly Housing Cost Distribution

Housing costs are generally lower in North Central Wisconsin than they are at the statewide level. This is evidenced by the Region having lower monthly median housing costs for both homeowners and renters. **Figures 26 and 27** display median housing costs across North Central Wisconsin for homeowners and renters respectively. Within the North Central Wisconsin Region, housing costs are generally lowest in Forest and Langlade Counties and highest in Marathon and Portage Counties.

Another way to analyze housing costs is to examine cost distribution by the share of the population. Consistent with the

When determining the affordability of housing, it is important to examine factors such as housing cost characteristics, the proportion of householders that are burdened by the costs of housing, home sales in terms of price and volume, and median household income. While the cost of housing and the share of households that are burdened by housing costs are generally lower in North Central Wisconsin than they are statewide, housing affordability is still an issue facing the Region.

lower housing costs in the Region, the share of homeowners and renters that pay over \$1,000 per month is lower in North Central Wisconsin than it is statewide. About 46 percent of homeowners within the Region pay more than \$1,000 per month on housing, compared to about 60% statewide. Similarly, about 32 percent of renters within the Region pay more than \$1,000 per month on housing, compared to about 52 percent statewide. **Figures 28 and 29** show monthly housing cost distributions for homeowners and renters respectively.

Figure 26: Median Monthly Housing Costs for Homeowners, 2023

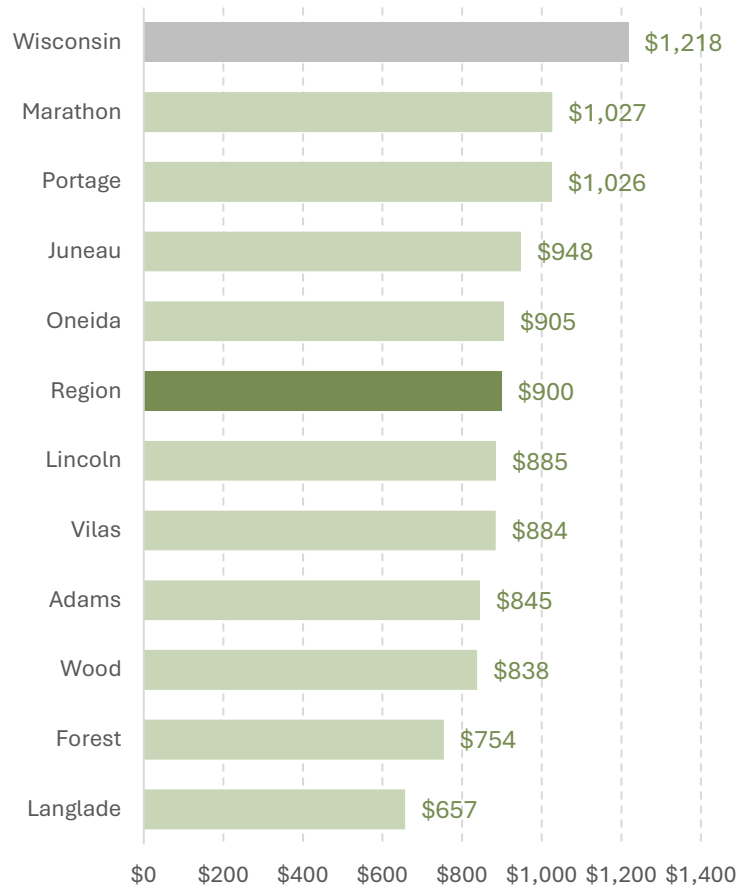


Figure 27: Median Monthly Housing Costs for Renters, 2023

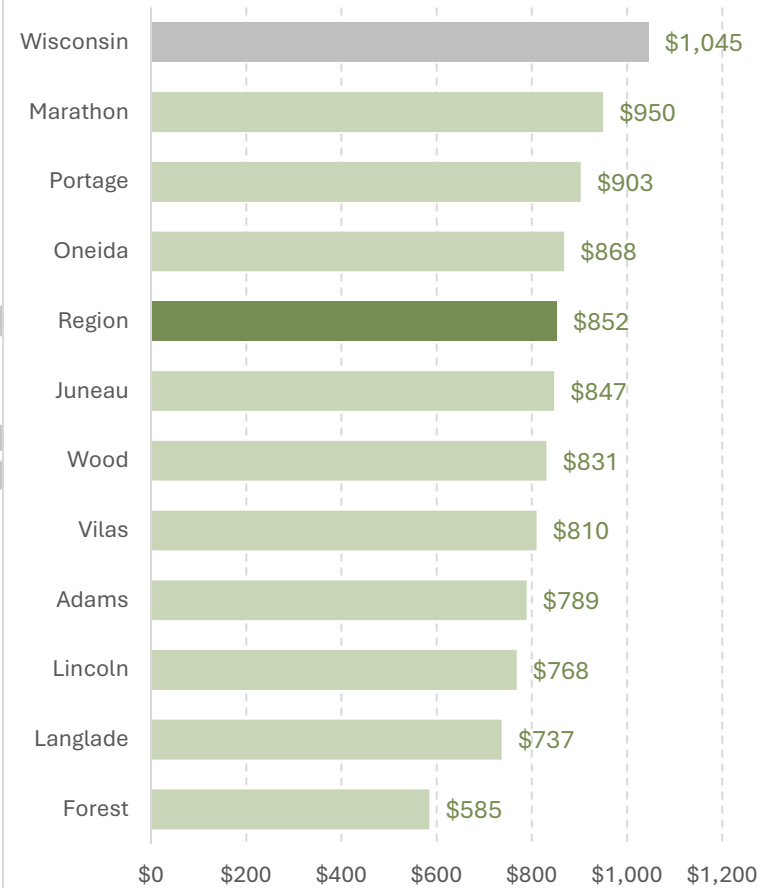


Figure 28: Owner Occupied Monthly Housing Cost Distribution by County, 2023

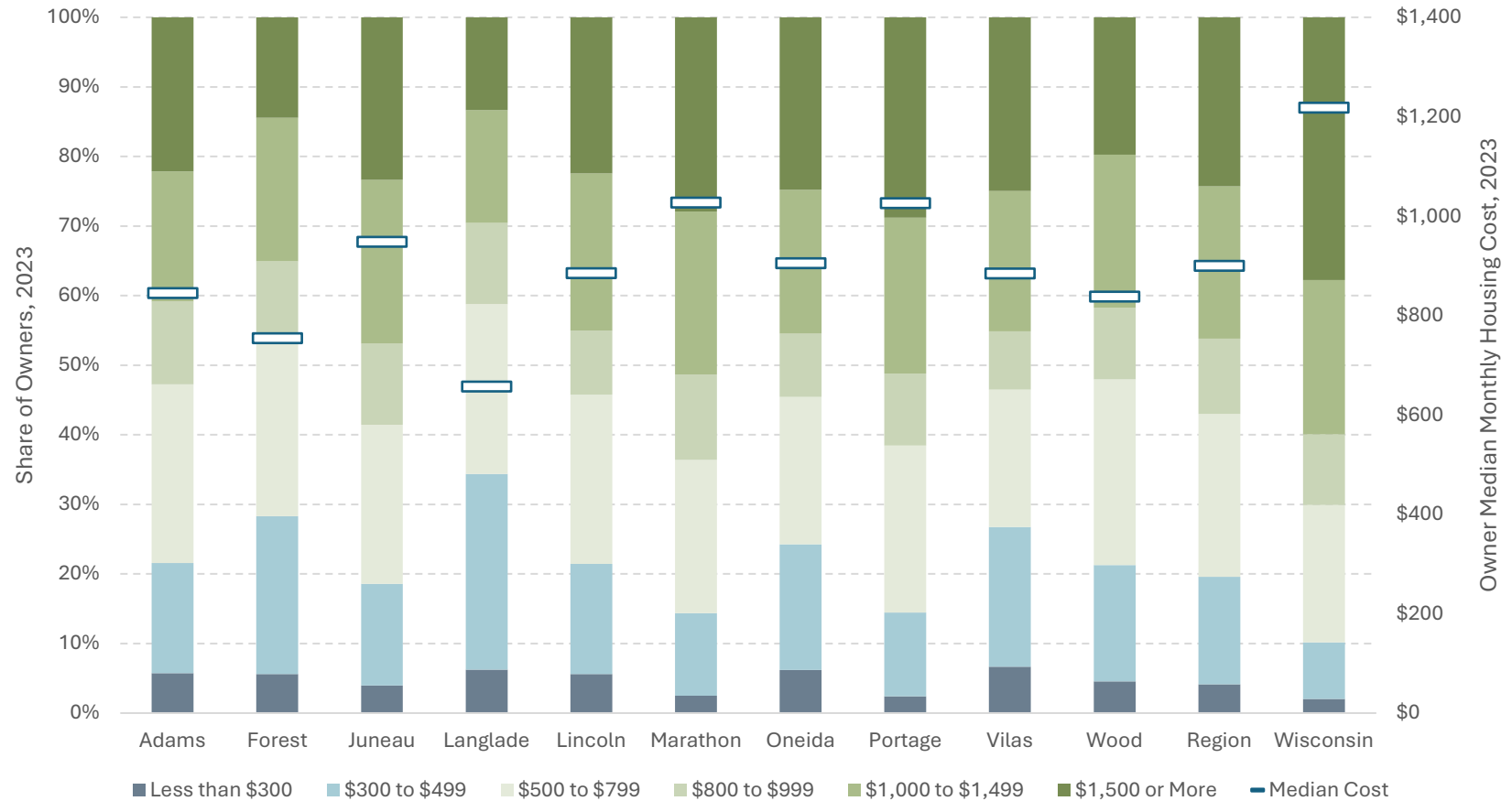
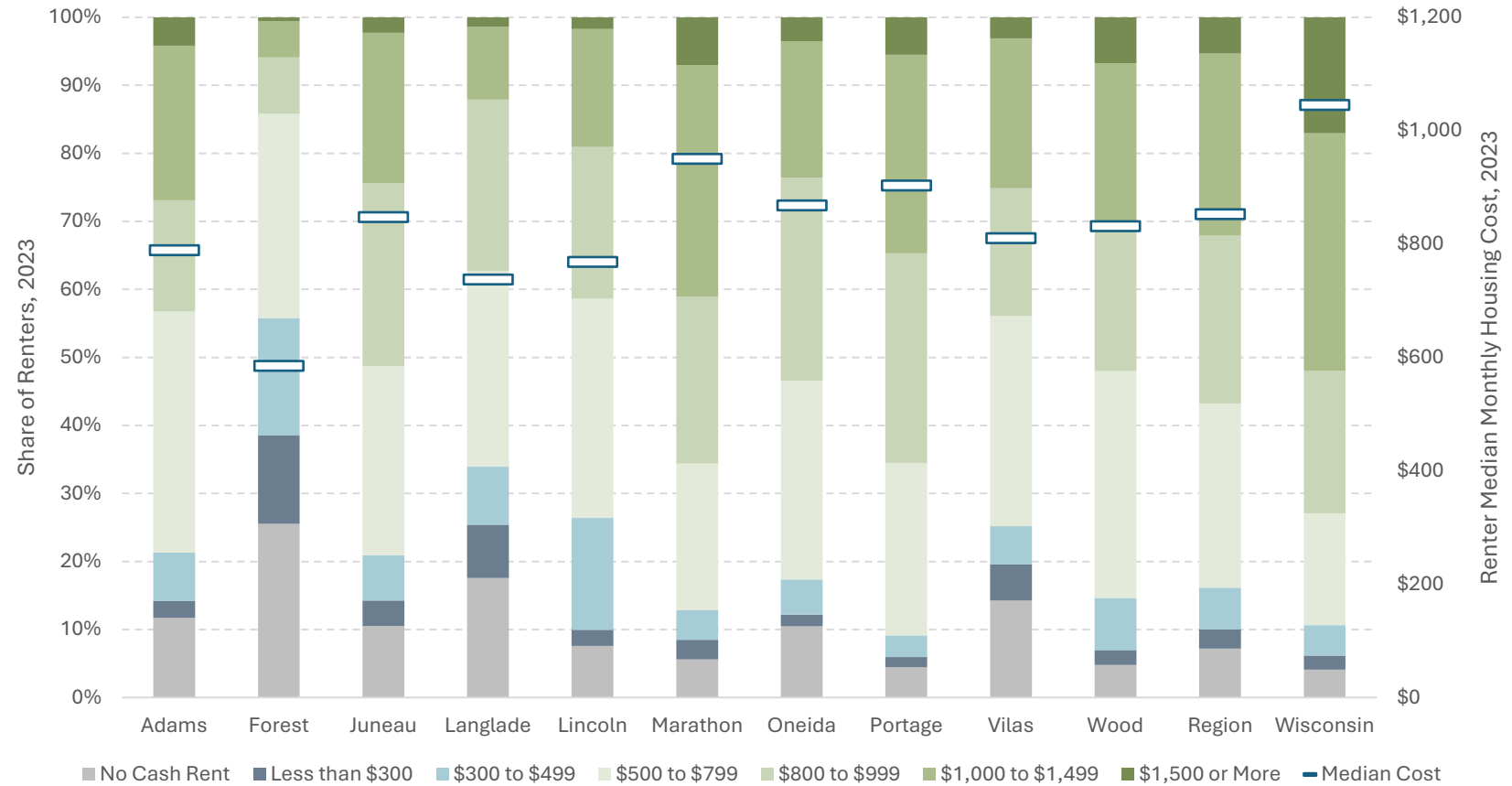


Figure 29: Renter Occupied Monthly Housing Cost Distribution by County, 2023



## Housing Cost Burden

There is a general consensus that a household should not have to spend more than 30 percent of its income on housing – this is the accepted definition of housing affordability by HUD. Households that spend more than 30 percent of their income on housing are considered cost-burdened. **Figure 30** displays the percentage of homeowners cost-burdened by housing costs in 2023. In 2023, nearly 17 percent of homeowners in North Central Wisconsin were cost-burdened, compared to about 18.4 percent of

homeowners statewide. The share of renters cost-burdened in the Region was also lower than the State, as shown in **Figure 31**. While the Regional share of both homeowners and renters considered cost-burdened by housing costs were lower than the State, there were four counties within the Region that had a higher share of homeowners that were cost-burdened than the State, and two counties with a higher share of renters that were cost-burdened than the State.

Figure 30: Share of Homeowners Cost-Burdened by Housing Costs, 2023

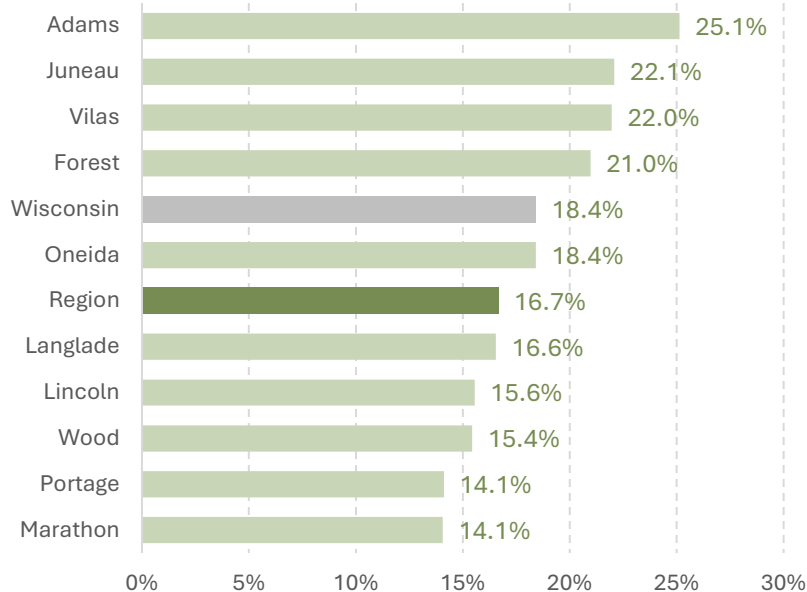
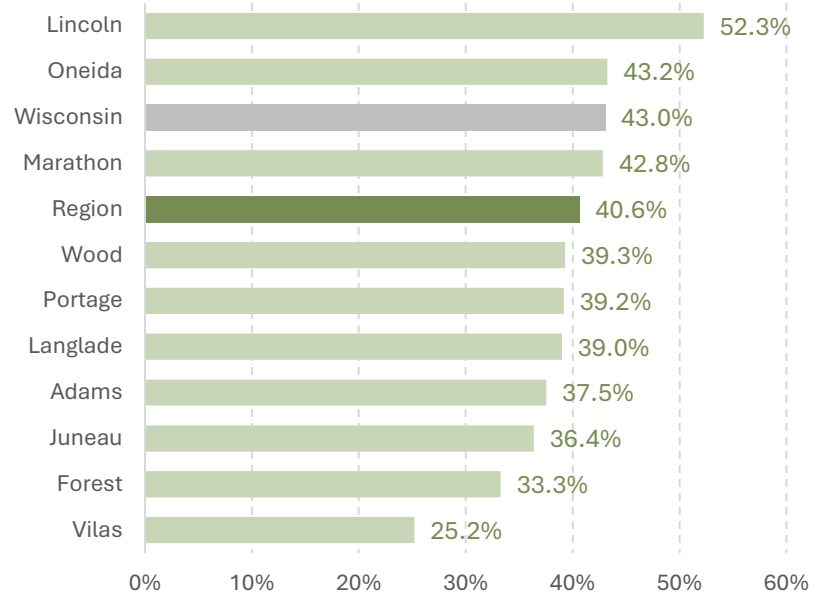


Figure 31: Share of Renters Cost-Burdened by Housing Costs, 2023



## Housing Sales Trends

In 2024, there were a total of 5,965 homes sold in North Central Wisconsin. This was lower than the 10-year average of 6,791 homes sold per year between 2015 and 2024. The number of home sales within the Region was at its highest between 2018 and 2021, when total homes sales within the Region peaked at 7,854 in 2020. Home sales have drastically decreased since 2021, with several factors such as higher interest rates, drastic increases in sales price, a lack of inventory, and high inflation all likely contributing to the decrease in home sales.

**Table 16** shows trends in annual home sales over the past decade in North Central Wisconsin. Consistent with monthly housing

costs, the sale prices of homes are generally lower in North Central Wisconsin than they are statewide. In 2024, only two counties (Vilas and Oneida) within the Region had a higher median home sales price than the statewide median. Within the Region, median home sale prices ranged from \$185,000 in Langlade County up to \$422,500 in Vilas County, as shown in **Figure 32**. Housing prices have risen faster than incomes due to a lack of inventory and high construction and infrastructure costs. Since 2013, median sales prices within North Central Wisconsin have increased by 55 percent, far outpacing the 10 percent growth in median household income during this time. **Figure 33** shows changes in median home sales price between 2013 and 2023 in North Central Wisconsin.

Table 16: Annual Home Sales										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Adams	520	578	553	527	609	654	663	577	531	558
Forest	112	133	132	152	126	182	185	164	152	144
Juneau	346	373	364	395	410	460	432	381	331	356
Langlade	329	368	379	338	346	446	484	381	300	348
Lincoln	427	467	472	544	499	561	522	483	443	436
Marathon	1,640	1,687	1,783	1,859	1,796	1,889	1,897	1,566	1,310	1,415
Oneida	717	804	798	929	865	1,028	946	755	616	649
Portage	759	757	758	771	781	799	843	695	642	646
Vilas	525	588	595	687	663	886	763	618	514	535
Wood	892	905	1,007	999	894	949	1,109	938	888	878
Region	6,267	6,660	6,841	7,201	6,989	7,854	7,844	6,558	5,727	5,965
Wisconsin	78,256	83,153	84,266	82,387	82,415	89,129	91,249	78,010	64,523	67,701

Source: Wisconsin Realtors Association



Figure 32: Median Home Sale Price by County, 2024

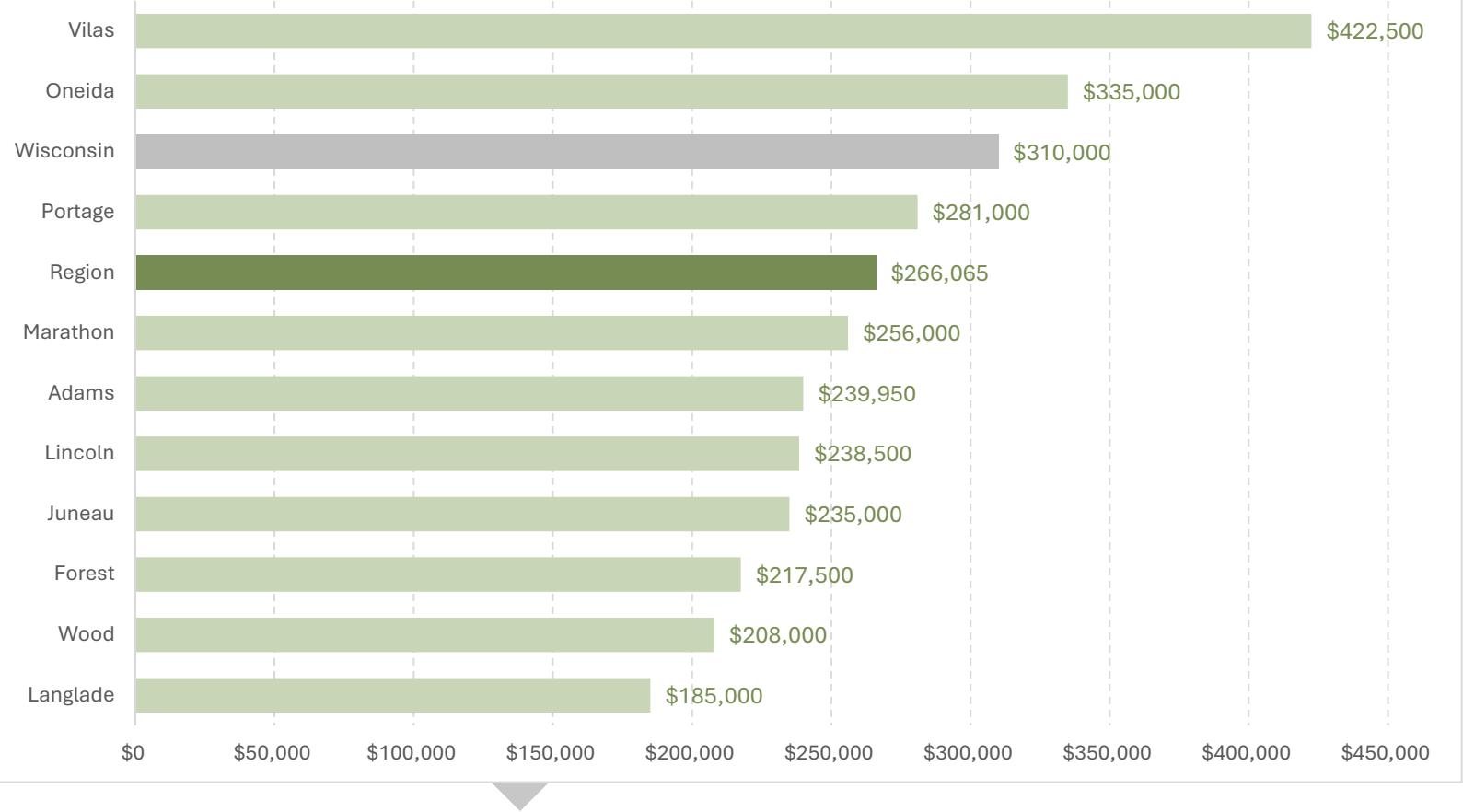
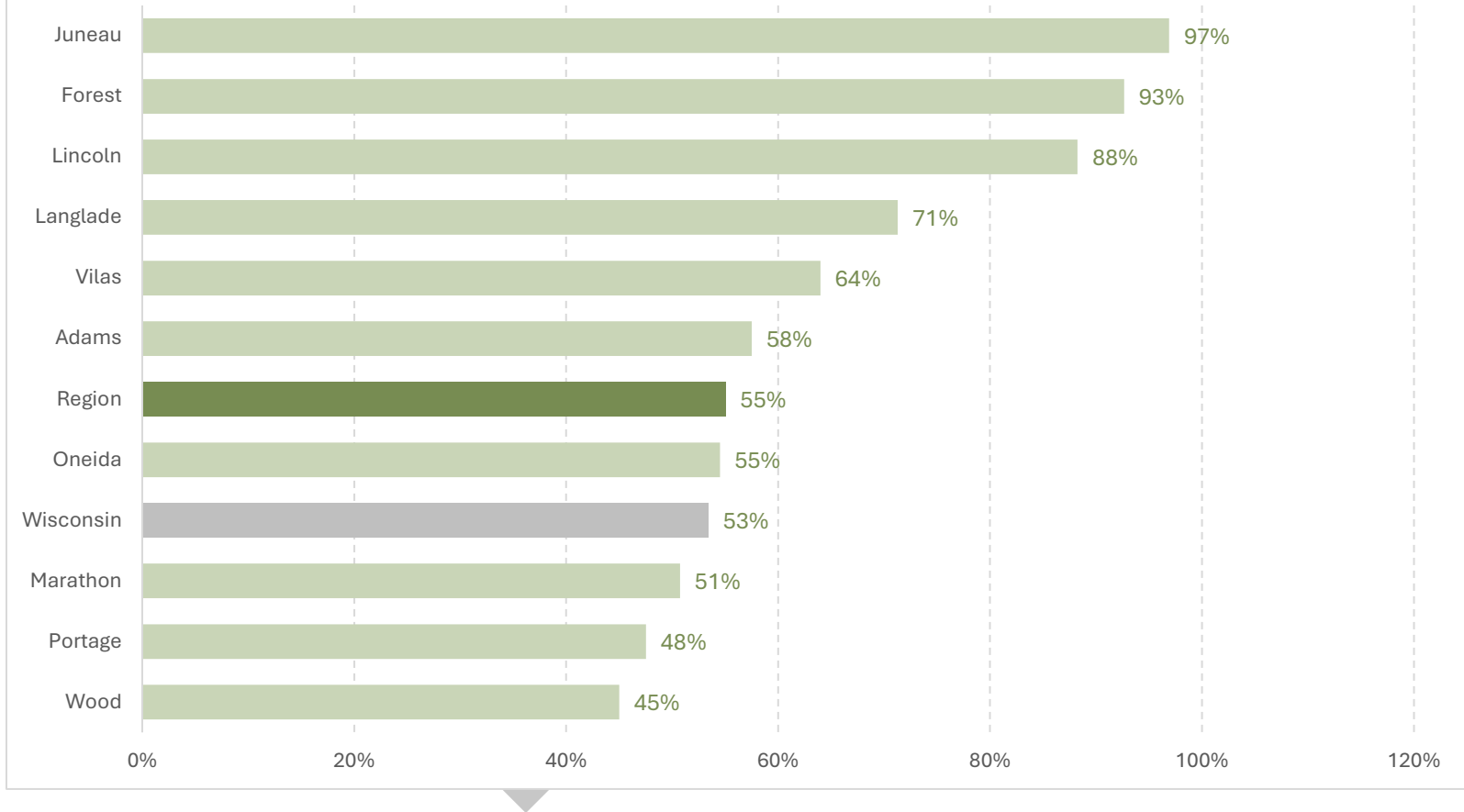


Figure 33: Percent Change in Home Sale Price (2013-2023)



## Broadband

With the important role that the internet plays in today's society, improving access to broadband has become a critical economic development initiative, especially for more rural areas such as the North Central Wisconsin Region. Broadband access is especially important in rural areas because it connects residents, businesses, and workers with the amenities and opportunities that are typically found in more urban areas and allows them to participate in a rising digital economy. This makes access to high-quality broadband critical for attracting and retaining residents, workers, and businesses alike. It is also important to consider other benefits that stem from improved access to broadband such as increased rates of entrepreneurship, increased stay-times for visitors and seasonal residents, increased productivity, improved educational outcomes, and improved health outcomes of residents. With an abundance of high-quality recreational opportunities that are in high demand and the high proportion of seasonal housing within North Central Wisconsin, improving broadband access represents an opportunity to stimulate local economies throughout the Region.

When examining the status of broadband in the Region, it is important to measure both the availability of broadband and broadband adoption rates. Broadband adoption rates are measured through the percentage of households with an internet subscription. To measure the availability of broadband, the

Federal Communications Commission (FCC) maps address-level broadband coverage data for homes and businesses throughout the country via its **National Broadband Map**. This allows the FCC to record the number of serviceable locations that have access to broadband. Serviceable locations are broken down into three categories, those that are served, underserved, or unserved by broadband. The FCC's definitions for these categories are provided below.

### FCC Definitions for Broadband Accessibility:

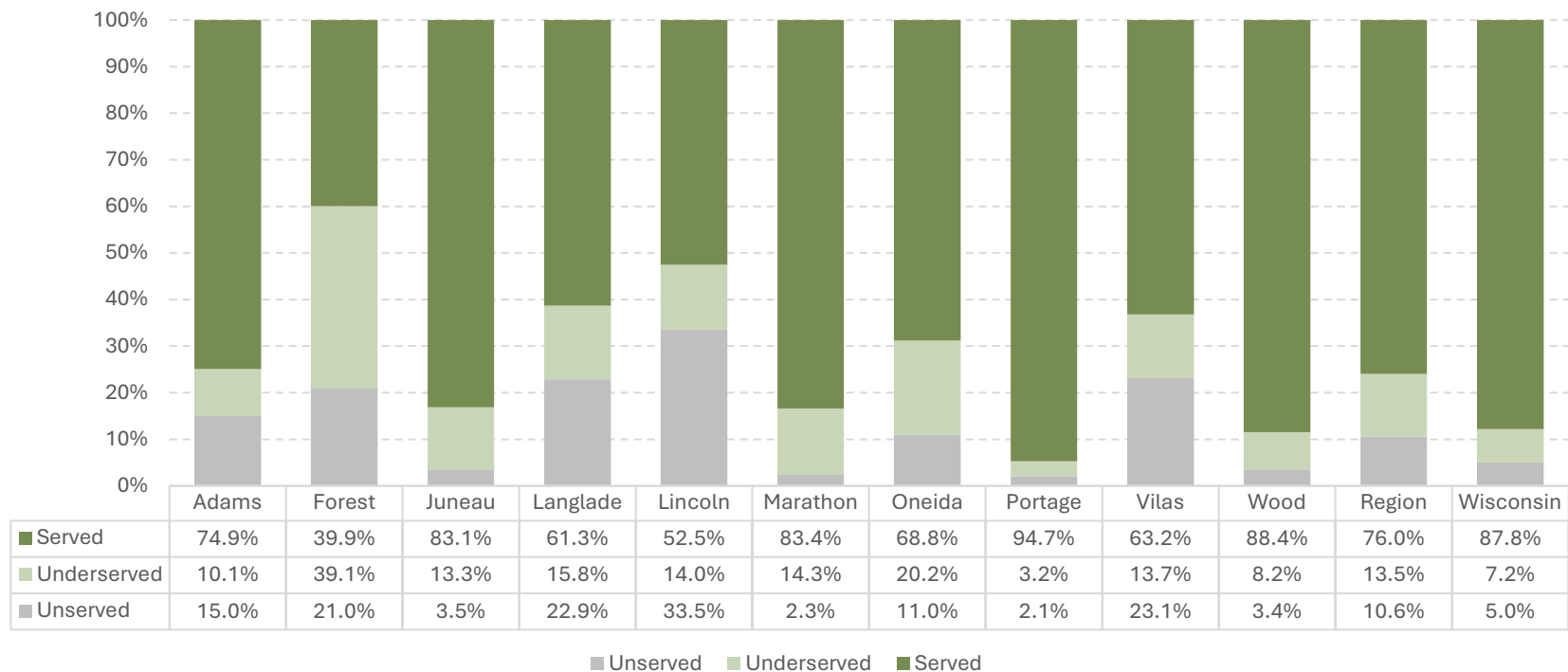
- **Broadband Serviceable Location (BSL):** A specific residential or business structure where fixed broadband internet service is, or can be, installed.
- **Served Location:** A BSL with access to reliable broadband (download/upload speeds of at least 100/20 Mbps).
- **Underserved Location:** A BSL with access to broadband with speeds higher than 25/3 Mbps but lower than 100/20 Mbps.
- **Unserved Location:** A BSL with either no access to broadband or access to broadband that is below the FCC's current benchmark of 25/3 Mbps.

## Broadband Accessibility

The most recent data from the FCC indicates that in 2024, about 76 percent of the Region's broadband serviceable locations (BSL's) were considered to be served, about 13.5 percent were underserved, while the remaining 10.6 percent of the Region's BSL's were unserved. **Figure 34** compares broadband

accessibility throughout the Region. While broadband accessibility within the Region was worse than the State, four counties (Juneau, Marathon, Portage, and Wood) had similar or better levels of broadband accessibility than the State.

Figure 34: Percentage of Broadband Serviceable Locations with Access to Broadband, 2024



Source: Federal Communications Commission's National Broadband Map (FCC Broadband Data Collection December 2024)

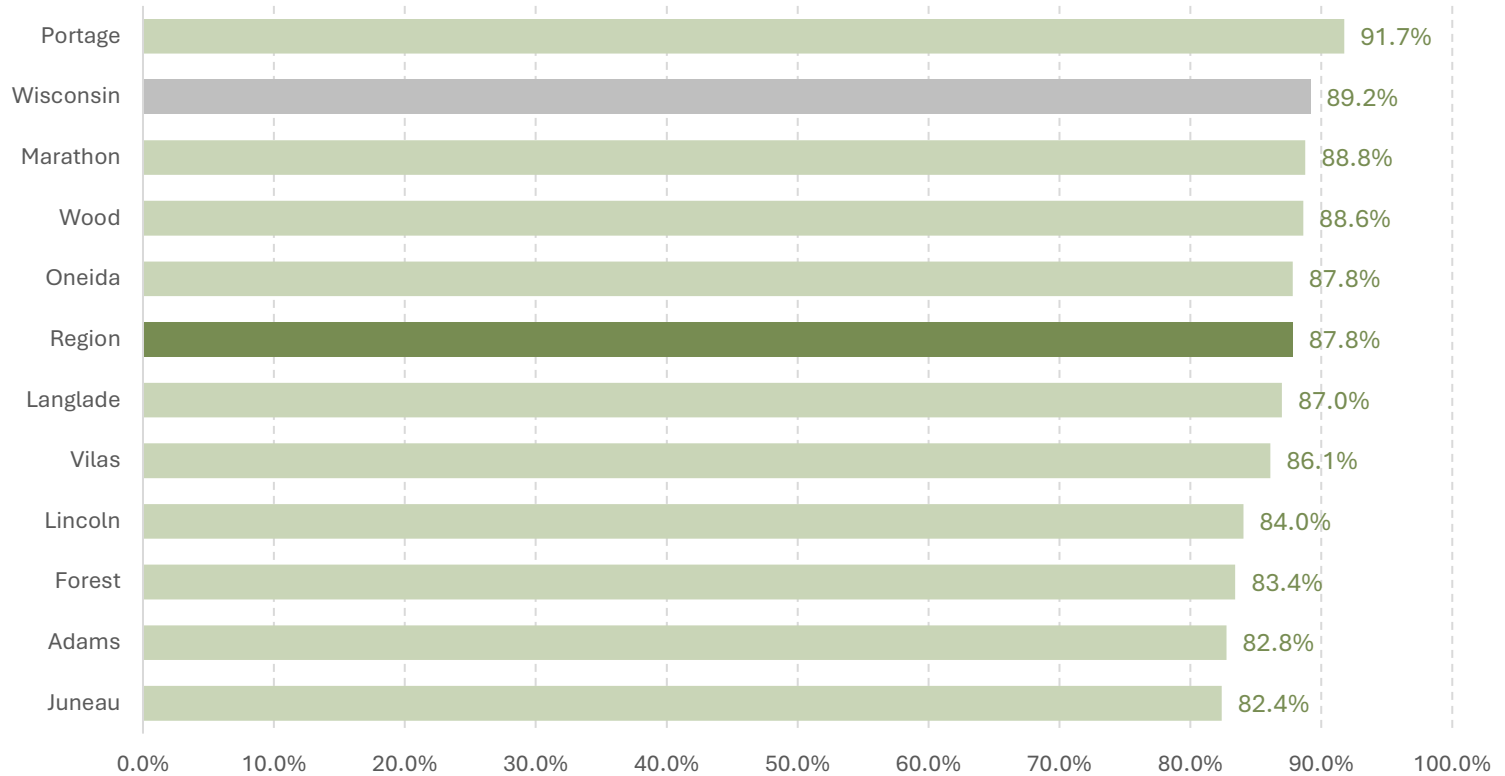
## Broadband Adoption

Broadband adoption rates are based on self-reported data collected by the American Community Survey and are measured as the percentage of households with a broadband subscription of any type (which includes cellular data and satellite internet service in addition to broadband infrastructure). Overall, about 88 percent of households throughout the Region had a subscription to broadband at their home in 2023. **Figure 35** shows broadband subscription rates throughout the Region in 2023. Broadband adoption rates within the Region are typically highest in and around the Region's population centers, and lowest in the more scarcely populated areas. This disparity in broadband adoption rates is partly due to differences in the availability of broadband in these areas, as broadband availability is much higher in more densely populated areas than in areas with low density population. Other factors such as educational attainment, income, age, and disability status also impact broadband adoption rates.

While most of the Region still has lower broadband adoption rates than the State as a whole, broadband adoption rates have significantly increased in the past several years. In 2019, only about 62 percent of households within the Region had a broadband subscription. With broadband subscription rates in the Region reaching 88 percent in 2023, the percentage of homes in the Region with a broadband subscription has increased by 42 percent since 2019, faster than the State's 32 percent growth in broadband subscription rate. Portage County was the only county within the Region that had a slower growth in broadband subscription rate than the State during this time.

The significant increase in broadband adoption rates over the past several years indicates that broadband availability is rapidly improving throughout the Region. This growth in broadband adoption rates throughout the Region also indicates that the Region is closing the broadband gap between the Region and the State.

Figure 35: Percentage of Households with a Broadband Subscription, 2023



## Gross Regional Product

Gross Regional Product (GRP) measures the total value of goods services produced in regional economies. When measured over time, GRP can help identify whether regional economies are growing or shrinking. Between 2013 and 2023, the Region's GRP increased by nearly 43 percent, totaling over \$25 billion in 2023. Each county within the Region also experienced growth in GRP during this time, with Vilas County experiencing the fastest growth in GRP and Wood County experiencing the slowest growth in GRP

during this time. GRP growth was slower in the Region as a whole than it was in the State during this time, indicating that the Region's economy is growing at a slower pace than the State's economy. However, Vilas, Portage, and Marathon Counties each experienced faster growth in GRP than the State. **Table 17** compares changes in GRP between 2013 and 2023 in North Central Wisconsin.

Table 17: Changes in GRP (2013-2023)			
County	2013	2023	Change in GRP
Adams	\$434,151,756	\$562,711,128	29.6%
Forest	\$227,582,437	\$330,426,422	45.2%
Juneau	\$789,464,399	\$1,103,438,851	39.8%
Langlade	\$625,357,617	\$829,442,221	32.6%
Lincoln	\$929,006,418	\$1,261,405,799	35.8%
Marathon	\$5,755,751,267	\$9,018,150,904	56.7%
Oneida	\$1,291,444,812	\$1,916,662,120	48.4%
Portage	\$2,909,405,186	\$4,679,924,293	60.9%
Vilas	\$549,644,983	\$949,179,496	72.7%
Wood	\$4,056,821,296	\$4,461,562,039	10.0%
Region	\$17,568,630,171	\$25,112,903,273	42.9%
Wisconsin	\$254,223,563,909	\$381,544,937,216	50.1%

Source: Lightcast

# Chapter 4 – Existing Infrastructure

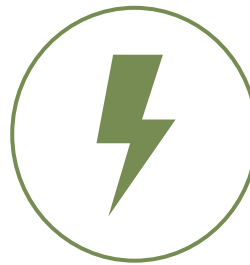
## Transportation



- Highway System
- Airports
- Transit
- Railroads
- Bike & Ped

Infrastructure

## Utilities



- Water & Wastewater Facilities
- Energy
- Telecommunications

## Business & Industrial Parks



- Total Parks: 69
- Total Acres: 10,984
  - Developed: 6,682
  - Available: 2,971
  - Restricted: 1,330



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

## Transportation

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 over 13,000 miles of local streets and roads. There are also nearly 1,000 miles of other miscellaneous roads, which are forest roads, fire lanes, and other roads not used for general travel purposes. Where jurisdictions overlap, the mileage is counted toward the higher class to avoid overstating the total miles of pavement within the system. The Region's transportation network is shown in **Map 2**.

## Interstate and Federal Highways

The Region is served by a number of Interstates and Federal Highways. Interstates and Federal Highways within the Region primarily serve as principal arterial roads, with the exception of USH 12 which serves as a two-lane minor arterial and alternate route for I-90/94. Interstates and Federal Highways serving the Region are listed below:

- **I-39** – A major north-south route connecting the Region with Madison, and Milwaukee and Chicago via I-90/94
- **I-90/94** – A major east-west route connecting the Region to Eau Claire, Minneapolis, Milwaukee, and Chicago
- **USH 8** – A major east-west route that connects the Northwoods and the Twin Cities
- **USH 10** – A major east-west route that connects the Region with the Twin Cities and Fox Valley
- **USH 12** – An east-west route that serves as an alternate route for I-90/94
- **USH 45** – A major north-south route that parallels USH 51 and travels through Antigo, eastern Oneida County, and Eagle River
- **USH 51** – A major north-south artery that connects the Northwoods with I-39 and Madison, Milwaukee, and Chicago

## 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, as STH 29 is a major east-west connection that serves as a principal arterial in its entirety, while the major section of STH 54 is a four-lane connecting Wisconsin Rapids to I-39 and Stevens Point.

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.

Major State Highway connections serving the Region include:

- **STH 13** – A major north-south route serving areas of the Region without direct Interstate access
- **STH 21** – An east-west route traveling through Adams and Juneau Counties
- **STH 29** – A major east-west route connecting the Region with Green Bay to the east and the Twin Cities to the west
- **STH 34** – A north-south route that connects Wausau and Wisconsin Rapids
- **STH 47** – A north-south route that runs through Langlade, Oneida, and Vilas Counties and connects the Region with the Fox Valley
- **STH 52** – An east-west route connecting Wausau and Wabeno traveling through the City of Antigo
- **STH 54** – An east-west route connecting the Region with Green Bay to the east and the Mississippi River to the west
- **STH 55** – A north-south route that carries traffic through Langlade County, Forest County, and the City of Crandon
- **STH 64** – An east-west route traveling through Langlade and Lincoln Counties
- **STH 70** – An east-west route traveling across northern Forest and Oneida Counties and southern Vilas County
- **STH 80** – A north-south route that runs through Juneau and Wood Counties
- **STH 82** – An east west route traveling through Adams and Juneau Counties

## 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.

## Airports

Airports are critical to economic development. Within the Region there are 19 public use airports, including two commercial airports. Central Wisconsin Airport is in the center of the Region in Mosinee and the Rhinelander - Oneida County Airport is in the northern part of the Region. These two airports are critical for the continued growth of the Region. Combined, the two commercial airports serving the Region had over 14,000 aircraft operations in 2021.

## Transit

Municipalities, Counties, and Metropolitan Planning Organizations (MPOs) administer several transportation options such as fixed bus routes, shared ride taxis, senior transportation, and ADA-accessible transportation. In addition to regular public transit, specialized transit services for the elderly and disabled are provided by each county in the Region, with several counties being involved in multi-county agencies, such as the Oneida-Vilas Transit Commission (Northwoods Transit Connections) and the Langlade-Menominee Transit Commission.

Communities with fixed route transit systems within the Region include Wausau, Stevens Point, and Merrill. Communities with shared-ride taxi service include Marshfield, Mauston, Plover, and Wisconsin Rapids. Lac du Flambeau and Forest County Potawatomi both provide Tribal transit services. Additionally, intercity bus service is available in parts of the region, including Stevens Point, Wausau, and Wisconsin Rapids. Service is provided by Jefferson and Lamers Bus Lines. Connections can be made to Green Bay, Chicago, and Minneapolis, and other places nationwide.

## Railroads

Fox Valley & Lake Superior, Canadian National, Union Pacific, and Canadian Pacific Kansas City operate rail lines in the Region. NCWRPC is a member of the Northwoods Rail Transit Commission, an organization dedicated to improving rail service for northern Wisconsin and Upper Michigan. Railroad infrastructure within the Region is shown in **Map 2**.

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

## Bicycle and Pedestrian Facilities

With the importance of Tourism to the Regional economy, bicycle and pedestrian facilities are another important transportation consideration. The Region has an extensive network of bicycle and pedestrian infrastructure; including the 400, Bearskin, Elroy-Sparta, Green Circle, Hillsboro, Mountain-Bay, Nicolet, Tomorrow River, and Wolf River State Trails that are managed by the WI DNR, the Ice Age National Scenic Hiking Trail traversing the Region, and numerous locally managed trail systems located throughout the Region. **Map 3** shows State Trails, the Ice Age National Scenic Trail, and notable local trail systems located throughout the Region. **NCWRPC's 2018 Regional Bicycle & Pedestrian Plan** contains a map of existing and recommended bicycle and pedestrian infrastructure throughout the Region.

## Utilities

Utilities that directly impact economic development include water & wastewater facilities, energy facilities, and telecommunications networks. The status of each within the Region is examined below:

### Water & Wastewater Facilities

Water and wastewater are among the most basic and fundamental municipal services. There are 59 municipal water systems in the Region, including ten systems that did not exist in 1978. Just over half of these systems are in the more urbanized area of the central sub-Region. Ten systems are in Juneau County, and 16 are in the five northern counties. Currently there are 70 municipal wastewater treatment systems in the Region. This is an increase of 12 since 1978. Over half of these systems (36) are in the three central counties. It would be expected that a high percentage of these facilities would be in the most urbanized areas.

## Energy Facilities

The energy system within North Central Wisconsin includes the Weston power plant and several hydroelectric dams. Power is distributed via a system of high voltage power lines. The Weston Power Plant site includes four separate plants that generate 525-megawatts of electricity for WPS. There is also a biomass fueled cogeneration power plant in Rothschild, collocated with a paper mill and was built to create 50-megawatts of electricity. Along the Wisconsin River there are 15 hydroelectric dams that produce electricity. A system of high voltage lines then moves the electricity from the source out to customers throughout the Region. The high voltage power lines generally follow major roads throughout the Region and connect areas with a higher concentration of population. In addition, power is moved in and out of the Region on the national power grid. It should be noted that there is a proposed potential project that would construct a 115 kV transmission line that would primarily run through southern Lincoln County and northern Marathon County.

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

## Telecommunications

As mentioned earlier, access to the internet is critical in today's economy, as the ability to connect to the internet is essential for both business and personal use. Access to reliable broadband helps create job opportunities 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. In addition to economic impacts, increased access to broadband will improve access to vital basic services such as health care, government, and financial services. This places a premium on having the infrastructure in place that can support a robust broadband network throughout the Region.

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". Options such as satellite and cellular data providers can help bridge 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.

As previously mentioned, about 76 percent of broadband serviceable locations throughout the Region had access to

reliable broadband services (service providing download/upload speeds of at least 100/20 Mbps) in 2024. As the FCC's method of measuring broadband coverage throughout the nation has recently changed, making direct comparisons for how access has improved is difficult, but observing the rapidly increasing broadband subscription rates experienced throughout the Region suggests that broadband coverage throughout the Region is also rapidly improving.

The development of broadband access in Wisconsin has been aided by a statewide initiative, sponsored by the Public Service Commission of Wisconsin (PSC), to promote the availability and sustainable adoption of broadband internet access. The effort provides grant funding to promote both the availability and reliability of high-speed Internet to improve economic opportunity and quality of life. The initiative is funded through a federal grant, as well as in-state matching funds and in-kind services. The PSC's **Wisconsin Broadband Map** shows broadband coverage throughout Wisconsin, while the FCC's **National Broadband Map** also shows broadband coverage throughout the State.

One major broadband funding effort underway in Wisconsin is the federal Broadband Equity, Access and Deployment (BEAD) program, which seeks to expand high-speed internet statewide. Under this program, the North Central Wisconsin Region is slated to receive over \$152 million in grant funding, impacting over 28,000 locations throughout the Region. **Table 18** breaks down BEAD funding by county.

Table 18: BEAD Award Allocations by County		
County	Locations Served	Award Allocation
Adams	2,304	\$6,294,488.34
Forest	2,170	\$26,836,996.36
Juneau	952	\$7,670,582.01
Langlade	3,141	\$13,868,705.24
Lincoln	2,885	\$19,336,068.80
Marathon	7,788	\$36,393,729.36
Oneida	5,068	\$23,760,214.21
Portage	683	\$990,171.43
Vilas	2,846	\$14,777,082.78
Wood	364	\$2,392,297.98
<b>Region</b>	<b>28,201</b>	<b>\$152,320,336.51</b>

*Source: Public Service Commission of Wisconsin*

### BEAD Program

The Bipartisan Infrastructure Law created the Broadband Equity, Access, and Deployment (BEAD) Program with a goal of providing high-speed internet for all Wisconsinites. BEAD will support the deployment of qualifying internet technology that provides service of 100/20 Megabits per second (Mbps) download/upload to all households and businesses in Wisconsin that lack access to 100/20 Mbps.

## Business & Industrial Parks

Business and/or industrial parks are important assets to both the local community and the Region. There are 69 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. The NCWRPC recently completed the **North Central Region Industrial Park Inventory, Absorption, and Needs Study**, which contains an inventory of all business and industrial parks located throughout the Region. This study also lists the known characteristics of each industrial park, including access to municipal water, sewer, gas, electricity, and rail, whether the park is in a Tax Incremental Financing District (TID) or not, known internet download and upload speeds, and which highways access the park. Statewide maps for utility providers, broadband and cell signal coverage, and rail and highway access are available online from various state agencies. They are continually updated as infrastructure expands, changes ownership, or is modified.

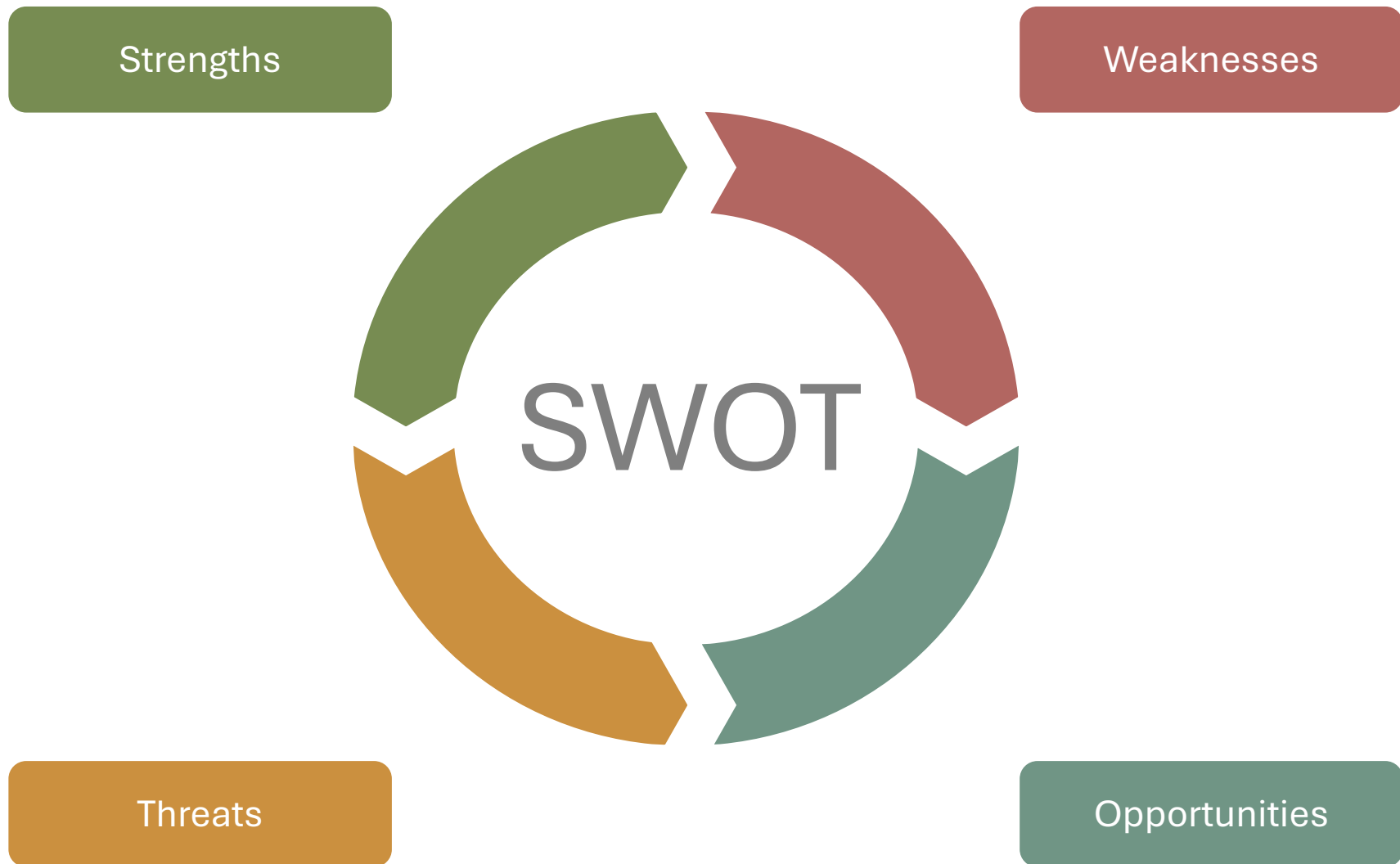
Every county in the Region has at least one industrial and/or business park, while there are 20 in Marathon County. The majority of these spaces are located in the central and south sub-Regions. In all, these parks include nearly 11,000 acres of business and industrial land, of which over 6,600 acres have been developed, nearly 3,000 acres are available for development without restrictions, and an additional 1,330 acres have not yet been developed but have development restrictions.

Overall, the Region has about a 29-year supply of industrial park lots; however, there may be a shortage of larger lots or lots in parks in the most ideal locations that a specific business may desire. For example, Oneida County only has 2 acres total as of 2020, making it difficult for local businesses to expand. On the other end of the spectrum, Vilas County has an estimated 91 to 210 years’ worth of industrial acreage. But as nearby counties run low on available lots, the growth rate in Vilas County may accelerate in the 2020s. Finally, of the 69 total industrial parks, 20 of them have 10 or fewer available acres, and 10 of them are full, meaning that nearly half of the industrial parks in the Region may benefit from expansion, even if there appears to be a surplus in each county. Proximity to other available acreage should be considered when evaluating where expanded acreage should be located. For example, Twin Towers Industrial Park in Portage County is full, but it is near several other parks with extensive available acreage. This contrasts with Oneida County, which only has 2 available acres countywide, indicating a need for industrial expansion throughout the entire county.

The locations of the Region’s industrial and business parks are shown in **Map 4**. Appendix B of the North Central Region Industrial Park Inventory, Absorption, and Needs Study contains a listing of industrial park characteristics such as amenities offered and land availability, while detailed maps showing land availability within each park can be found in Appendix C of the same plan.



# Chapter 5 – SWOT Analysis



According to the EDA, a regional Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis should answer the question, “*Where are we now?*” by using relevant data and background information to help identify the critical internal and external factors that speak to the Region’s unique assets and competitive positioning. The SWOT is a strategic planning tool used by organizations to ensure that there is a clear objective informed by a comprehensive understanding of the Region’s capabilities and capacity. The following SWOT analysis of the North Central Wisconsin Region identifies the Region’s competitive advantages—those indigenous assets that make the Region special or competitive in the national and global economies—juxtaposed against those internal or external factors that can keep the Region from realizing its potential.<sup>1</sup>

### SWOT Process

The SWOT Analysis was conducted through a virtual meeting held by NCWRPC Staff and the CEDS Committee. CEDS Committee members and NCWRPC Staff reviewed various Regional economic and demographic data as well as the existing infrastructure in place throughout the Region before the SWOT Analysis was conducted in order to gain an understanding of the current state of the Region. Committee members and NCWRPC Staff then worked together to develop a list of strengths, weaknesses, opportunities, and threats for the North Central Wisconsin Region.

The SWOT Analysis uses the following definitions for strengths, weaknesses, opportunities, and threats:

- **Strengths:** The Region’s competitive advantages that the Region can build upon to spur economic growth across the Region.
- **Weaknesses:** The Region’s competitive disadvantages limiting the Region’s growth potential.
- **Opportunities:** Potential chances or occasions that the Region is well-suited to capitalize on for regional improvement or progress.
- **Threats:** Potential chances or occasions that can inflict negative impacts on the Regional economy if not properly mitigated.

## SWOT Considerations

As part of the SWOT Analysis, CEDS Committee members were asked to consider the following prompts when identifying the Region's strengths, weaknesses, opportunities, and threats:

- What are the Region's assets?
- What are the Region's economic drivers?
- Which segments of the economy are most distressed?
- Which industries are growing, and which industries are declining?
- What are the opportunities and threats facing the Region, and how is the Region positioned to succeed?
- What factors and/or elements are in place (or need to be put in place) to ensure the long-term success, viability, and durability of the Regional economy?

## SWOT Results

As part of the SWOT Analysis, the CEDS Committee reviewed existing strengths, weaknesses, opportunities, and threats from previous CEDS updates and determined whether or not they were still applicable. The CEDS Committee then identified new strengths, weaknesses, opportunities, and threats by discussing various topics that were not identified in previous updates. Common topics discussed by the CEDS Committee included healthcare issues, childcare access, the role of outdoor recreation and tourism in our Region, the desirability of the Region, water quality, housing, distance to major markets and airports, and transportation.

Once the individual SWOT categories were finalized, individual topics within each of the SWOT categories were grouped together based on how similar they are (e.g. natural resources strengths, industry weaknesses, etc.). A summary of the SWOT results is included in the following pages:

# Strengths

## Industry

- Strong manufacturing base
- Recent investments in Forestry
- Strong Food & Agricultural Processing industries
- Tourism

## Natural Resources

- Quality freshwater resources
- Access to natural resources
- Wealth of recreational activities
- Quality outdoor recreation opportunities

## Quality of Life

- Region has a high quality of life
- Region is desirable, people want to be here
- Region can accommodate various life stages
- Strong reputation – friendliness & “Northwoods” atmosphere
- Desirable pace of life
- Quality healthcare options
- Retirees offer a significant resource for knowledge, volunteerism, and community involvement

## Workforce

- Knowledgeable and hardworking workforce
- Innovative workforce
- Quality education system
- Technical, 2-year, and 4-year college programs

## Business & Infrastructure

- Low costs for starting a business
- Competitive wages for businesses
- Low state taxes for businesses
- Access to quality interstates
- Access to regional & municipal airports
- Regional economic development effort & communication

# Weaknesses

## Workforce

- Aging workforce – high proportion of workers nearing retirement
- Lower wages for workers
- Lack of skilled labor for specialties, as well as a lack of workers with desired skillsets in manufacturing
- Low awareness of manufacturing careers that are available
- Lack of training resources for elected officials
- Shortage of experienced government staff

## Health

- Rural health care access, capacity, and price issues
- Childcare access, especially in rural areas
- Contamination issues impacting quality of water

## Natural Resources

- Aquatic/natural and terrestrial invasive species
- Lack of national forest access for timber production
- Drinking water contamination issues

## Socio-Economic

- Aging population & slow population growth
- Aging housing stock
- Availability of diverse & affordable housing options
- Lack of financial resources
- Lack of attractions for younger populations
- Distance to major markets
- Perception issues with economic opportunities available

## Business & Infrastructure

- Workforce availability
- Broadband gaps located throughout Region
- Lack of pre-existing infrastructure to attract businesses
- Long distance to major airports poses difficulties for business attraction
- Lack of public transit
- Shortage of available land ready for development – exacerbated by high proportion of public lands within Region
- Limited freight rail access in northern part of the Region
- Region continues to have a high dependence on traditional manufacturing
- Waste disposal & solid waste issues
- Road limits for heavy transportation

# Opportunities

## Socio-Economic

- Capitalization of educated & active retiree population
- Strong work ethic
- Current trend of people moving out of urban areas and into rural areas
- Central location of the Region makes it an attractive destination to residents, and for hosting events

## Industry

- Innovative workforce
- Strong work ethic
- Industry specific 2-year training programs
- Emerging Health Care sector
- Creative new uses for existing infrastructure i.e., idle paper mills
- Service Industry & Trades – as the Region's population ages, there will be an increase in demand for service-related jobs and resources
- Region can capitalize on the vast timber supply and existing construction-affiliated businesses to help address housing shortages
- Specialized manufacturing clusters
- Better use of the regional airport

## Business & Infrastructure

- Entrepreneurial support
- Increasing number of incubators and seed accelerators
- Increase regional collaboration
- Better use of the regional and municipal airports
- Amtrak access and stops

## Tourism

- Region has premier destinations
- Great Pinery Heritage Waterway
- Sand Valley
- Vacation Rentals by Owner

## Natural Resources

- Natural resources and environment
- Access to freshwater
- Access to Federal lands timber

# Threats

## Workforce

- Aging population – Increases in retirements
- Shrinking workforce, especially in manufacturing
- Unprepared workforce
- Low wages result in low-quality workers
- Brain-drain, threat of people not moving back after receiving education

## Industry

- Lack of diversity in industries
- Manufacturing dependency
- Paper manufacturing dependency
- Reliance on seasonal tourism – snowmobiling
- Shortage of older woods supply for timber production

## Natural Resources

- Declining water quality due to contamination issues
- Clustering of renewable energy source can lead to a loss of productive farmland and natural habitats
- Aquatic and terrestrial invasive species

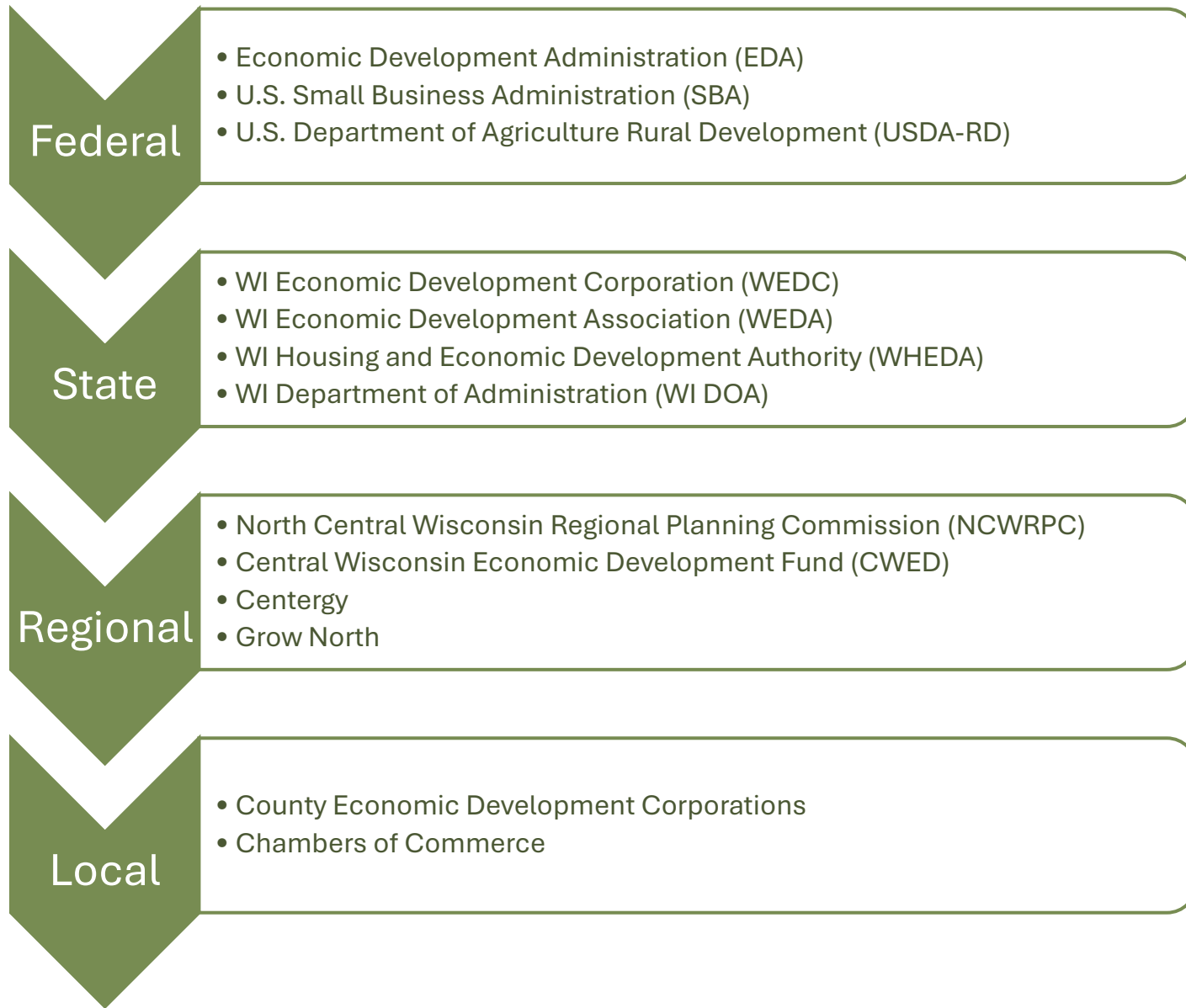
## Health

- Health care access, especially in rural areas
- Lack of dental & vision care access
- Behavioral health access & availability
- Long waits for appointments
- Lack of healthcare staff
- Facilities are concentrated in urban areas
- Childcare access
- Growing healthcare costs
- National economic uncertainty

## Business & Infrastructure

- Lack of funding options for entrepreneurs, small, and midsize businesses
- Future natural gas availability
- Potential impacts of data centers on the electrical grid
- Lack of train service in some areas
- Lack of alternative transportation options
- Dependency on vehicle ownership
- Lack of on-demand transportation services
- Lack of alternative transportation options limits Region's ability to support aging in place

# Chapter 6 – 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 Resources**

### **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 – EDA's Public Works program helps distressed communities revitalize, expand, and upgrade their physical infrastructure. This program enables communities to attract new industry, encourage business expansion, generate local investment, and create or retain long-term jobs through land acquisition, development, and infrastructure improvement projects that establish or expand industrial or commercial enterprises.

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. Funding programs offered by the SBA are listed below:

- 7(a) Loans – SBA’s primary business loan program for providing financial assistance to small businesses.
- 504 Loans – Long-term, fixed rate financing of up to \$5 million for major fixed assets that promote business growth and job creation.
- Microloans – Provide loans of up to \$50,000 to help small businesses start up and expand.

### **U.S. Department of Agriculture Rural Development (USDA-RD)**

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. USDA-RD programs include:

- Business and Industry Loan Guarantees (B&I)
- Rural Business Development Grants (RBDG)
- Rural Business Investment Program (RBIP)
- Rural Cooperative Development Grants (RCDG)
- Rural Microentrepreneur Assistance Program (RMAP)
- Rural Innovation Stronger Economy (RISE) Grant Program
- Community Facilities Direct Loans & Grants
- Rural Community Development Initiative Grants
- Intermediary Relending Program (IRP)

## State Resources

### Wisconsin Economic Development Corporation (WEDC)

The Wisconsin Economic Development Corporation is the State's primary department for the delivery of integrated services to businesses. Their mission is to strategically invest in Wisconsin to enhance the economic well-being of people and their businesses and communities. Programs offered by WEDC include:

- Brownfield Program
- Capacity Building Grants (CB)
- Certified Sites
- Historic Preservation Tax Credit
- Business Opportunity Loan Fund
- Workforce Training Grants
- Idle Sites Redevelopment Program
- Community Development Investment (CDI) Grant Program
- Fast Forward Program
- Wisconsin Investment Fund
- The Industrial Revenue Bond (IRB) Program
- Technology Development Loan Program

### Wisconsin Department of Administration (DOA)

The Wisconsin DOA administers the Community Development Block Grant (CDBG) program in Wisconsin. The CDBG program is a federal-allocated grant program under the U.S. Department of Housing and Urban Development (HUD). The DOA's Division of Energy, Housing and Community Resources (DEHCR) administers the State's CDBG program and provides funding to units of general local government that do not receive an annual allocation directly from HUD. The primary purpose of the CDBG program is the development of viable communities through the provision of decent affordable housing, a suitable living environment, and the expansion of economic opportunities, principally for the benefit of persons of low and moderate income. There are multiple programs offered in Wisconsin under the CDBG program, which include:

- Economic Development Program (CDBG-ED)
- Public Facilities Program (CDBG-PF)
- Planning Program (CDBG-PLNG)
- Emergency Assistance Program (CDBG-EAP)
- Public Facilities Economic Development Program (CDBG-PFED)
- Housing Regions and Small Cities Revolving Loan Program (CDBG-HSG)

### **Wisconsin Economic Development Association (WEDA)**

WEDA is a statewide non-profit organization dedicated to expanding Wisconsin's economy. WEDA represents the economic development interests of both the private and public sectors through leadership on statewide initiatives to advance economic development in Wisconsin. WEDA's mission is to enhance economic development in Wisconsin through professional development, networking, and advocacy.

### **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.

### **Wisconsin Department of Natural Resources (DNR)**

The DNR offers several programs related to economic development. One such program is the Knowles Nelson Stewardship Fund, which provides funding to expand opportunities for outdoor recreation among other things. DNR also provides programming for environmental cleanup and brownfields through the Bureau of Remediation and Redevelopment, which oversees the investigation and cleanup of environmental contamination and the redevelopment of contaminated properties (e.g. brownfield sites, hazardous waste cleanups, spill response, state-funded cleanups).

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 GIS registry. These databases connect to statewide information about contaminated sites, spills, cleanups, and other data. The DNR administers two financial programs for the investigation and cleanup of brownfields: the Wisconsin Assessment Monies (WAM) program and the Ready for Reuse Loan and Grant program.

### Wisconsin Department of Workforce Development (DWD)

DWD offers programs in vocational rehabilitation, employee training, childcare establishment, and adult apprenticeship programs in construction, services, and industrial/manufacturing activities, among others. Two prominent programs administered by the DWD include the Workforce Innovations Grants program and the Wisconsin Fast Forward program.

The DWD's Workforce Innovations Grants program is a collaboration between DWD and the WEDC to provide funding to regional organizations to design and implement innovative plans to tackle regional workforce challenges such as workforce training and improving access to childcare, housing, and transportation.

The Wisconsin Fast Forward (WFF) program provides innovative talent development solutions driven by employers to train and retain highly skilled workers. The WFF standard grant program awards funds to Wisconsin businesses to reimburse costs associated with occupational training that will, in turn, qualify workers for full-time employment, higher level employment, or increased wages. These grants cover training costs for current employees, as well as new workers who are unemployed or underemployed. The WFF expanded grant program reimburses school districts for the cost of technical education equipment used in vocational training for advanced manufacturing fields. The grant program helps students transition from high school into the workforce.

### Other State Resources

Other organizations and programs offered statewide are listed below:

- Wisconsin Small Business Development Center (SBDC)
- Wisconsin Small Cities Program
- Wisconsin Department of Children and Families (DCF)
- Transportation Economic Assistance (TEA)
- Wisconsin Office of Rural Prosperity
- Wisconsin Innovation Service Center
- Hmong Wisconsin Chamber of Commerce
- Wisconsin Women's Business Initiative Corporation (WWBIC)
- UW-Extension
- Wisconsin Department of Revenue (DOR)

## Regional Resources

### 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 both apply for and maintain eligibility for certain grants. The NCWRPC also provides a number of resources such as the North Central Wisconsin Entrepreneurship Portal, an inventory of the Region's industrial and business parks, biannual economic profiles for each county within the Region, and quarterly economic reports from Lightcast (formerly EMSI) for each county.

### Central Wisconsin Economic Development Fund (CWED)

The Central Wisconsin Economic Development Fund (CWED) Revolving Loan Program works with entrepreneurs and their lenders to structure financing packages for start-up and expanding businesses to encourage economic growth in the area. CWED loans usually have low interest rates, reduced collateral requirements, and flexible terms. CWED does not seek to compete with banks for projects, but rather complement them and other programs in a total financial structure.

Each county within the North Central Wisconsin Region participates in CWED. CWED funding objectives are to:

- Encourage business development that supports job creation
- Raise personal incomes by providing opportunities for employee growth
- Promote creation, retention, and expansion of existing businesses
- Leverage private investment throughout the region

### North Central Wisconsin Workforce Development Board (NCWWDB)

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 their region.

### Centergy

Centergy serves a five-county region comprising of Adams, Lincoln, Marathon, Portage, and Wood Counties. Centergy envisions itself as the Collective Voice for advancing prosperity and vibrancy in its five-county region. The organization's mission is to serve as the engine for regional growth and economic development through collaboration with local partners. To drive the mission, Centergy has identified four pillars of focus: Talent Growth, Regional Advocacy, Business Development, and Partner Engagement. These pillars provide a strategic framework to lead economic development and prosperity in Central Wisconsin into the future. Centergy aims to collaborate with businesses and partners to retain and attract in-demand talent throughout its five-county region.

### Grow North

Grow North serves an eight-county region including Forest, Langlade, Lincoln, Oneida, and Vilas Counties. Grow North helps connect local economies in Northern Wisconsin to resources that might not be available to any one smaller region. Grow North follows four main strategies to accomplish their mission and has developed actions to move the organization forward in development of the economy of the region:

- Strengthen relationships and two-way communication so as to understand economic development issues and be able to act on those issues. Leverage, collaborate and coordinate efforts for the region on Federal, State, and Local levels.
- Monitor issues that impact economic development in the region, and be a voice to advocate for change.
- Market the economic strengths and natural assets of the region to those within and beyond the region.
- Continue consistent presence and dialogue with Federal and State Agencies and Officials.

## Local Resources

There are various local economic development organizations located throughout the Region that assist local economic development activities. Types of economic assistance provided by these organizations include business support services (training, development, financial assistance), leading local initiatives such as broadband and childcare expansion, supporting infrastructure projects, providing workforce development programs, promoting tourism, and providing marketing assistance.

Nine of the ten counties within the Region have full-time economic development organizations, while Wood County has an economic development committee that oversees economic activity throughout the County. Many individual communities throughout the Region have their own development groups; some are associated with chambers of commerce, while others are local development or redevelopment corporations/authorities. Additionally, several municipalities throughout the Region have their own economic/community development departments and committees.

The county-level economic development organizations for each county are listed below:

- Adams County Economic Development (ACED)
- Forest County Economic Development Partnership
- Juneau County Economic Development Corporation
- Langlade County Economic Development Corporation
- Lincoln County Economic Development Corporation
- MCDEVCO (Marathon County)
- Oneida County Economic Development Corporation
- Portage County Business Council
- Vilas County Economic Development Corporation
- Wood County Economic Development Committee



# Chapter 7 – Regional Strategy

1

## GOAL ONE

Promote and increase communication between regional and county economic development, workforce development and other organizations.

2

## GOAL TWO

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

3

## GOAL THREE

Create an innovative atmosphere to foster an entrepreneurially supportive environment.

4

## GOAL FOUR

Promote and attract new business to the Region.

5

## GOAL FIVE

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

6

## GOAL SIX

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

7

## GOAL SEVEN

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

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

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Goal 1: Promote and increase communication between regional and county economic development, workforce development and other organizations.

- **Objective 1.1:** Collaborate with local, county, economic development organizations, surrounding regional planning commissions, state, and federal agencies, as well as private sector.
- **Objective 1.2:** Create a unified vision of Regional growth and development needs for the Region.
- **Objective 1.3:** Increase communication and collaboration at the Regional level about land use and transportation planning as it relates to economic development.
- **Objective 1.4:** Coordinate economic development efforts among all entities to provide a seamless approach to maintain and diversify the Regional economy.
- **Objective 1.5:** Establish and maintain long-term partnerships to promote economic development throughout the Region.

Goal 2: Encourage business retention and expansion to maintain and increase employment opportunities in the Region.

- **Objective 2.1:** Expand communication with existing businesses to identify opportunities and challenges.
- **Objective 2.2:** Improve the Region's competitiveness by assessing and leveraging industry clusters.
- **Objective 2.3:** Educate businesses on different grant and funding opportunities available.
- **Objective 2.4:** Encourage and promote business education on exporting opportunities.

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### Goal 3: Create an innovative atmosphere to foster an entrepreneurially supportive environment.

- **Objective 3.1:** Diversify the Region's economy by fostering the development of emerging industry sectors.
- **Objective 3.2:** Identify, create, and promote programs, activities, and policies fostering innovation and new business reducing the risk for entrepreneurs.
- **Objective 3.3:** Identify and grow angel and venture capital investments.
- **Objective 3.4:** Promote a culture of entrepreneurial and innovative business development.
- **Objective 3.5:** Promote and encourage the development of new business incubators throughout the Region.
- **Objective 3.6:** Develop the connection between the creative industries and economic development.
- **Objective 3.7:** Identify and study "place-making" opportunities to improve public spaces.
- **Objective 3.8:** Establish a link between educational institutions and business development.
- **Objective 3.9:** Support start-up and small businesses with training, market research, financial assistance, strategic planning, and other assistance.

## Goal 4: Promote and attract new business to the Region.

- **Objective 4.1:** Work with local governments, Regional partners, and the State to assist with the attraction of new businesses to the area.
- **Objective 4.2:** Recruit new businesses and industries that complement existing clusters, and place special emphasis on higher wage clusters.
- **Objective 4.3:** Diversify the Region's economy fostering the development of emerging and evolving industry clusters.
- **Objective 4.4:** Make prudent use of government incentives to enhance business development in the Region.
- **Objective 4.5:** Consider impacts on local workforce related to attraction.

Goal 5: Encourage the reuse of existing commercial and industrial sites for more sustainable economic development.

- **Objective 5.1:** Ensure that building and development codes and plans within the Region promote and facilitate the redevelopment of existing structures and infill development.
- **Objective 5.2:** Continue to assess, remediate, and redevelop brownfield sites throughout the Region, taking full advantage of federal and state funding opportunities.
- **Objective 5.3:** Work to increase the number of viable businesses and institutions in the downtown districts of our communities.
- **Objective 5.4:** Maintain and enhance infrastructure and public facilities throughout the Region.
- **Objective 5.5:** Maximize efficiency of existing public utilities systems through redevelopment.

Goal 6: Meet the full range of private sector infrastructure needs with emphasis on transportation, utilities, and communications.

- **Objective 6.1:** Develop reliable broadband infrastructure networks, especially in rural areas.
- **Objective 6.2:** Work with WisDOT to plan for, develop and maintain the capacity of the Region's transportation system.
- **Objective 6.3:** Continue to support upgrades and repair of existing roadways.
- **Objective 6.4:** Expand municipal utilities to serve areas where they are needed for job growth.
- **Objective 6.5:** Work with Central Wisconsin Airport and the Rhinelander / Oneida County Airport to expand cargo and passenger service in the Region.
- **Objective 6.6:** Support efforts to maintain and expand freight rail in the Region.
- **Objective 6.7:** Explore commuter and passenger rail service to the Region.
- **Objective 6.8:** Continue to maintain and improve the Region's water, sewer, and street systems.



Goal 7: Ensure the future availability of a skilled and flexible workforce prepared to meet the needs of both existing and emerging industries and technologies.

- **Objective 7.1:** Work with the North Central Workforce Development Board 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.
- **Objective 7.2:** Increase the number of 4-year high school completions in the Region.
- **Objective 7.3:** Develop a plan to retain and attract a young workforce.
- **Objective 7.4:** Increase the number of associates and 4-year degrees in the Region.
- **Objective 7.5:** Develop entrepreneurial training and education at area high schools, technical colleges, and universities.
- **Objective 7.6:** Work with businesses, K-12 Schools, Higher Education Schools, and Workforce Development to determine and develop skill sets.
- **Objective 7.7:** Enhance business-specific leadership skills in young professionals.
- **Objective 7.8:** Develop a training program for retiring workforce to help develop a “second career”.
- **Objective 7.9:** Develop a plan to ensure we have the capacity for emerging technologies.

## NCWRPC Action Plan

<b>Goal 1: Promote and increase communication between regional and county economic development, workforce development and other organizations.</b>	
<b>Task</b>	<b>Timeline</b>
Attend county economic development corporation meetings at least once a year.	Ongoing
Attend occasional regional economic group meetings.	Ongoing
Attend meetings/conferences/webinars with various state and federal agencies and other organizations.	Ongoing
Attend EDA meetings/calls/conferences.	Ongoing

<b>Goal 2: Encourage business retention and expansion to maintain and increase employment opportunities in the Region.</b>	
<b>Task</b>	<b>Timeline</b>
Prepare Comprehensive Economic Development Strategy and annual performance reports.	Annually
Attend, at least annually, member County Economic Development Corporation's regular meetings to provide updates on NCWRPC assistance and CEDS.	Annually
Provide Regional demographic information using Lightcast and other data to complete economic analysis.	Ongoing
Update County Profiles.	Occasionally
Assist the Central Wisconsin Economic Development Fund (CWED) and work with other existing loan funds in the area to support local business development.	Ongoing
Provide assistance to members as needed. Explore WEDC, WHEDA, DOA, EDA and other grant opportunities to complete plans/projects.	Ongoing
Assist local economic development staff, county ED committees, and regional economic development groups.	Ongoing
Promote the retention and expansion of existing businesses.	Ongoing
Encourage and assist start-up of firms in the Region.	Ongoing

### Goal 3: Create an innovative atmosphere to foster an entrepreneurially supportive environment.

Task	Timeline
Assist local communities prepare and update comprehensive plans and other related plans.	Ongoing
Assist preparing "downtown plans" as part of a Quality of Place effort.	Ongoing
Prepare feasibility studies for new business incubators if cost sharing is available.	Ongoing

### Goal 4: Promote and attract new business to the Region.

Task	Timeline
Research and identify new business grant opportunities with DOA, WEDC, WHEDA, USDA, and EDA.	Ongoing
Maintain inventory and map of business (industrial and commercial) acreage in the Region.	Ongoing
Support communities in the recruitment of new businesses to the Region.	Ongoing
Research and identify emerging cluster in the Region and State.	Ongoing

### Goal 5: Encourage the reuse of existing commercial and industrial sites for more sustainable economic development.

Task	Timeline
Assist Brownfield planning efforts to support communities.	Ongoing
Work with DNR and other regional planning commissions in the State Brownfield Consortium.	Ongoing
Work with organizations to get properties and sites listed on "Locate in Wisconsin" website.	Ongoing
Pursue grant opportunities from federal agencies, such as EDA, EPA, and USDA.	Ongoing

**Goal 6: Meet the full range of private sector infrastructure needs with emphasis on transportation, utilities, and communications.**

<b>Task</b>	<b>Timeline</b>
Maintain a listing of all business/industrial parks in the Region.	Ongoing
Suitable areas with needed infrastructure should be available for industrial and commercial development in the Region.	Ongoing
Promote broadband infrastructure and other technology development and expansion in the Region.	Ongoing
Work with CWA and Rhineland-Oneida County Airport as needed.	Ongoing
Assist efforts of the Northwoods Rail Commission.	Ongoing

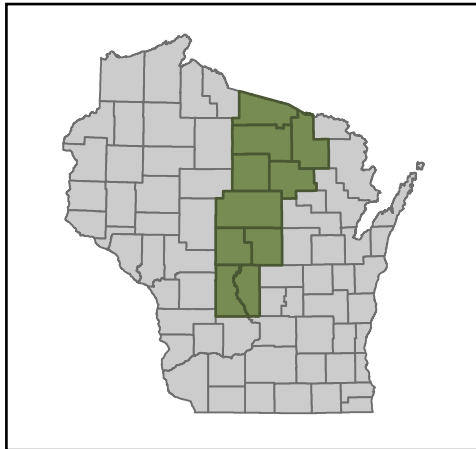
**Goal 7: Ensure the future availability of a skilled and flexible workforce prepared to meet the needs of both existing and emerging industries and technologies.**




Support the efforts of and collaborate with the NCWWDB, Technical Colleges, 2 and 4-year Colleges and Universities.	Ongoing
Provide data related to employment characteristics and needs.	Ongoing
Encourage educational institutions to develop training programs needed by the Region's businesses.	Ongoing
Encourage educational institutions and job training centers to offer "second" career training options.	Ongoing

# Maps

# Map 1 - Regional Context

DRAFT



-  Cities
-  Villages
-  Towns



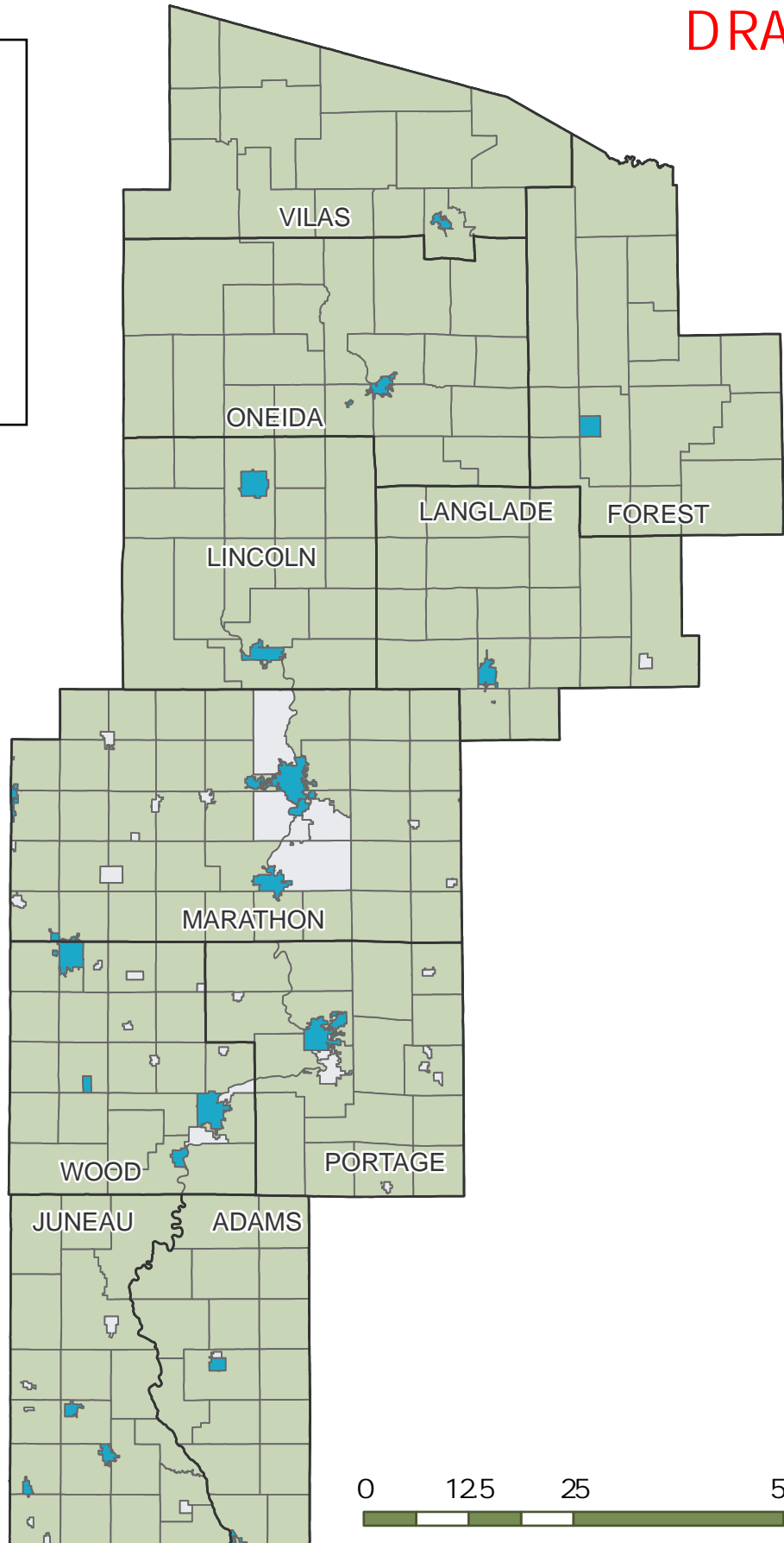
Source: WI DNR, WisDOT, NCWRPC

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Prepared By:  
**North Central  
Wisconsin Regional  
Planning Commission**

210 McClellan St., Suite 210, Wausau, WI 54403  
715-849-5510 - [staff@ncwrpc.org](mailto:staff@ncwrpc.org) - [www.ncwrpc.org](http://www.ncwrpc.org)

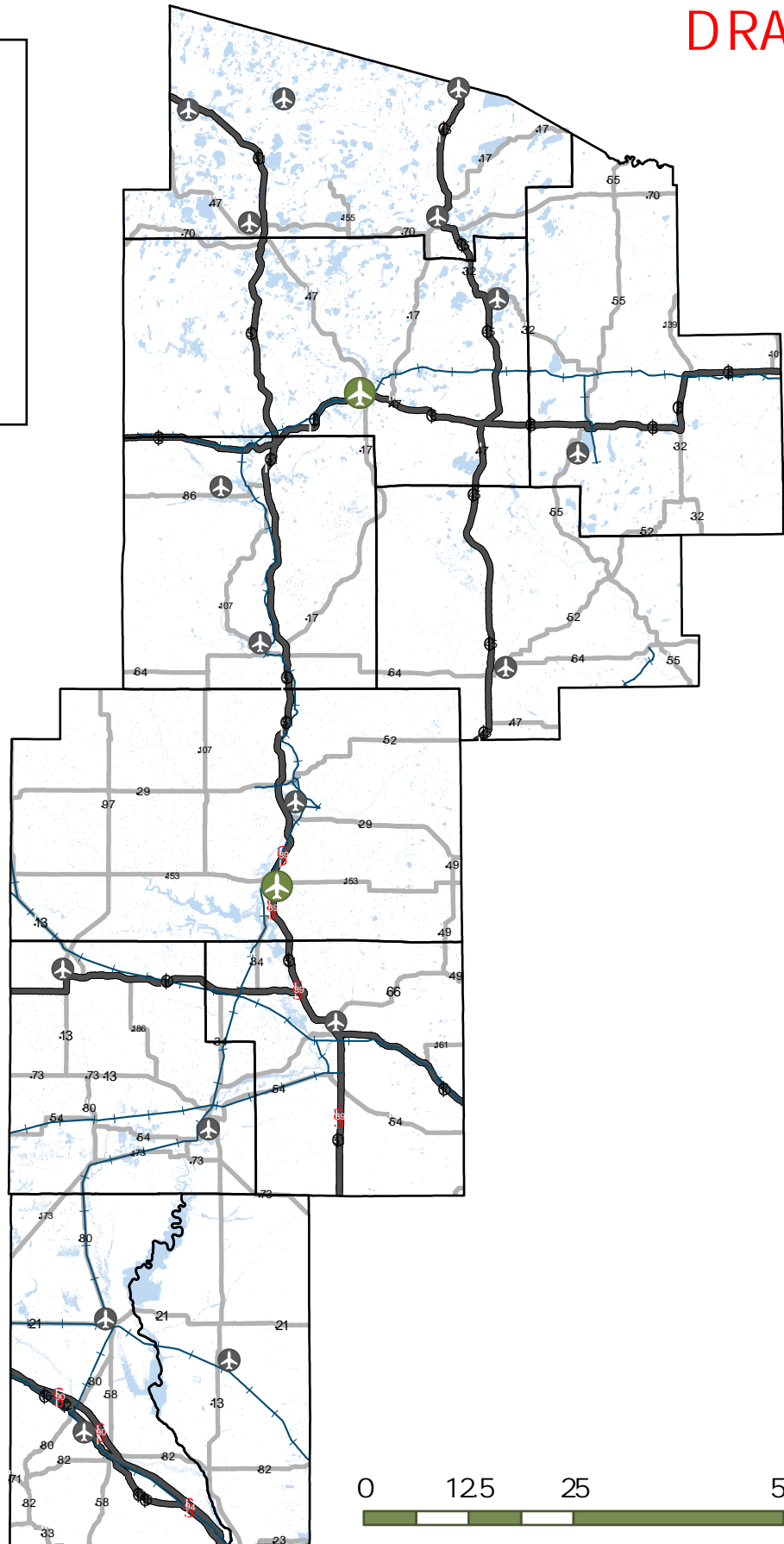
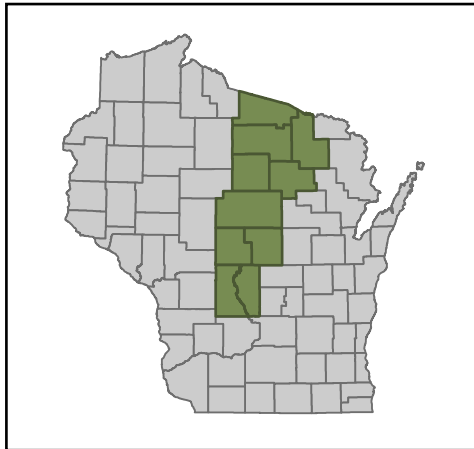



0 125 25 50 Miles

A horizontal scale bar with four segments. The first segment is labeled '0', the second '125', the third '25', and the fourth '50'. The word 'Miles' is at the right end of the bar.

# Map 2 - Transportation

DRAFT



-  US Highways
-  State Highways
-  Railroad
-  Commercial Airports
-  General Airports
-  Water



Source: WI DNR, WisDOT, NCWRPC

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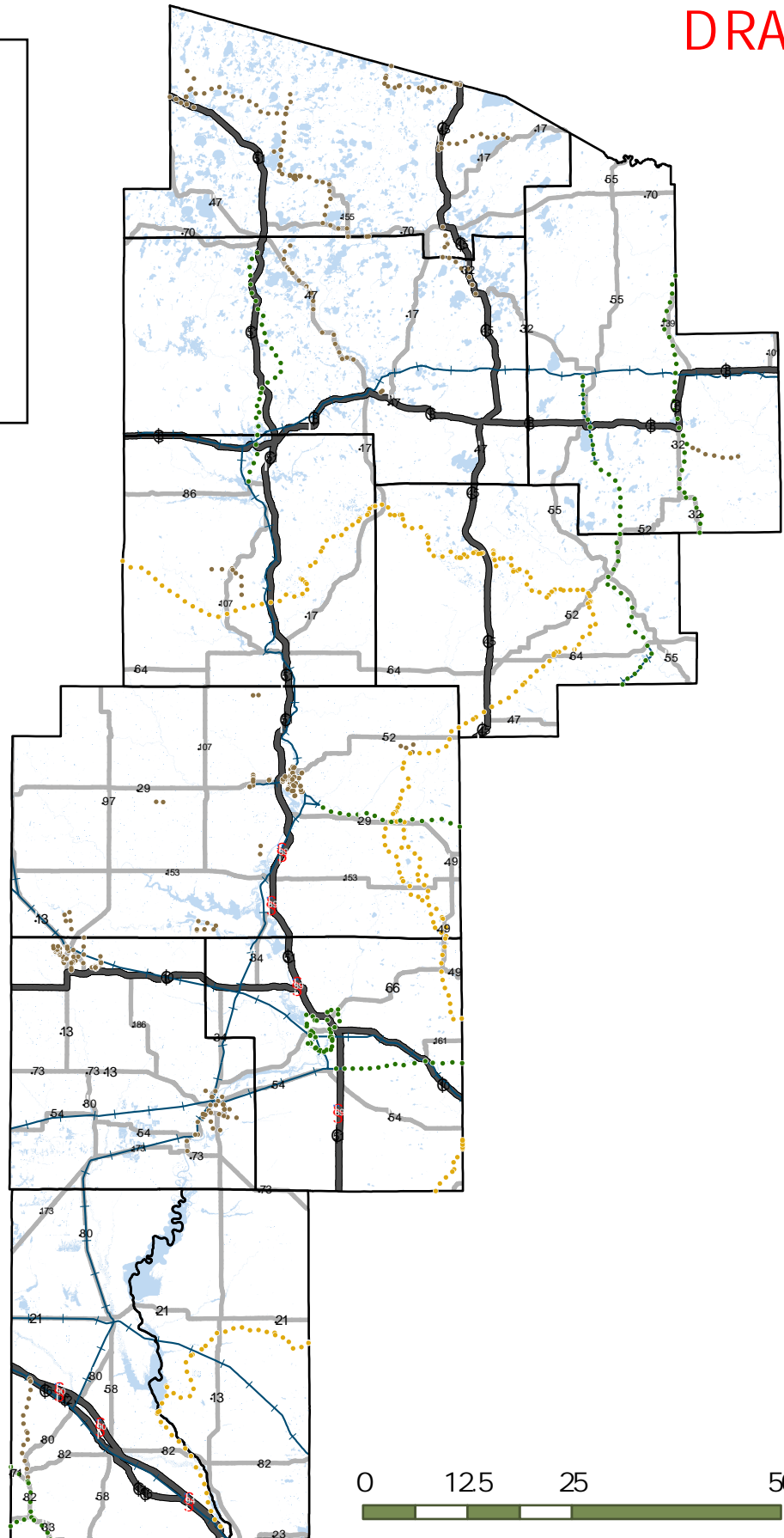
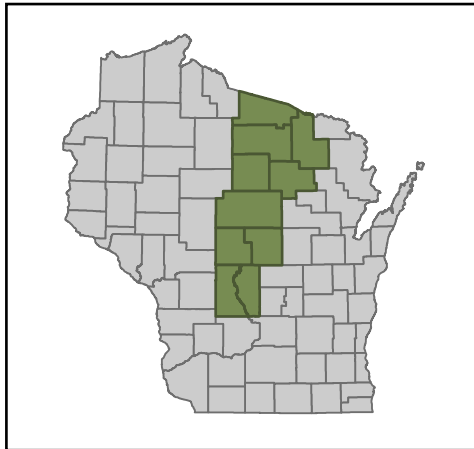
Prepared By:  
**North Central  
Wisconsin Regional  
Planning Commission**

210 McClellan St., Suite 210, Wausau, WI 54403  
715-849-5510 - staff@ncwrpc.org - www.ncwrpc.org

0 125 25 50 Miles

# Map 3 - Bike & Pedestrian Trail Network

**DRAFT**



- US Highways
- State Highways
- Railroad
- State Trails
- Ice Age National Scenic Trail
- Local Trails
- Water



Source: WI DNR, WisDOT, NCWRPC

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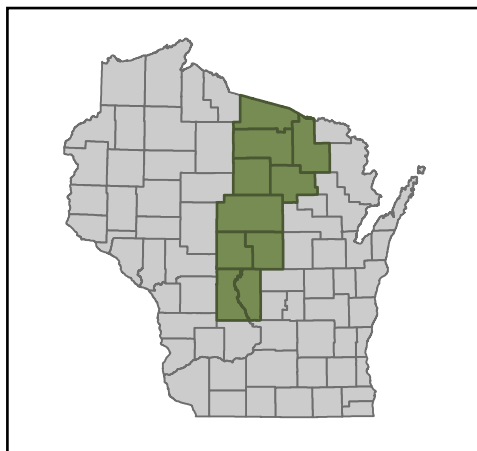
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0 125 25 50 Miles



# Map 4 - Business & Industrial Parks

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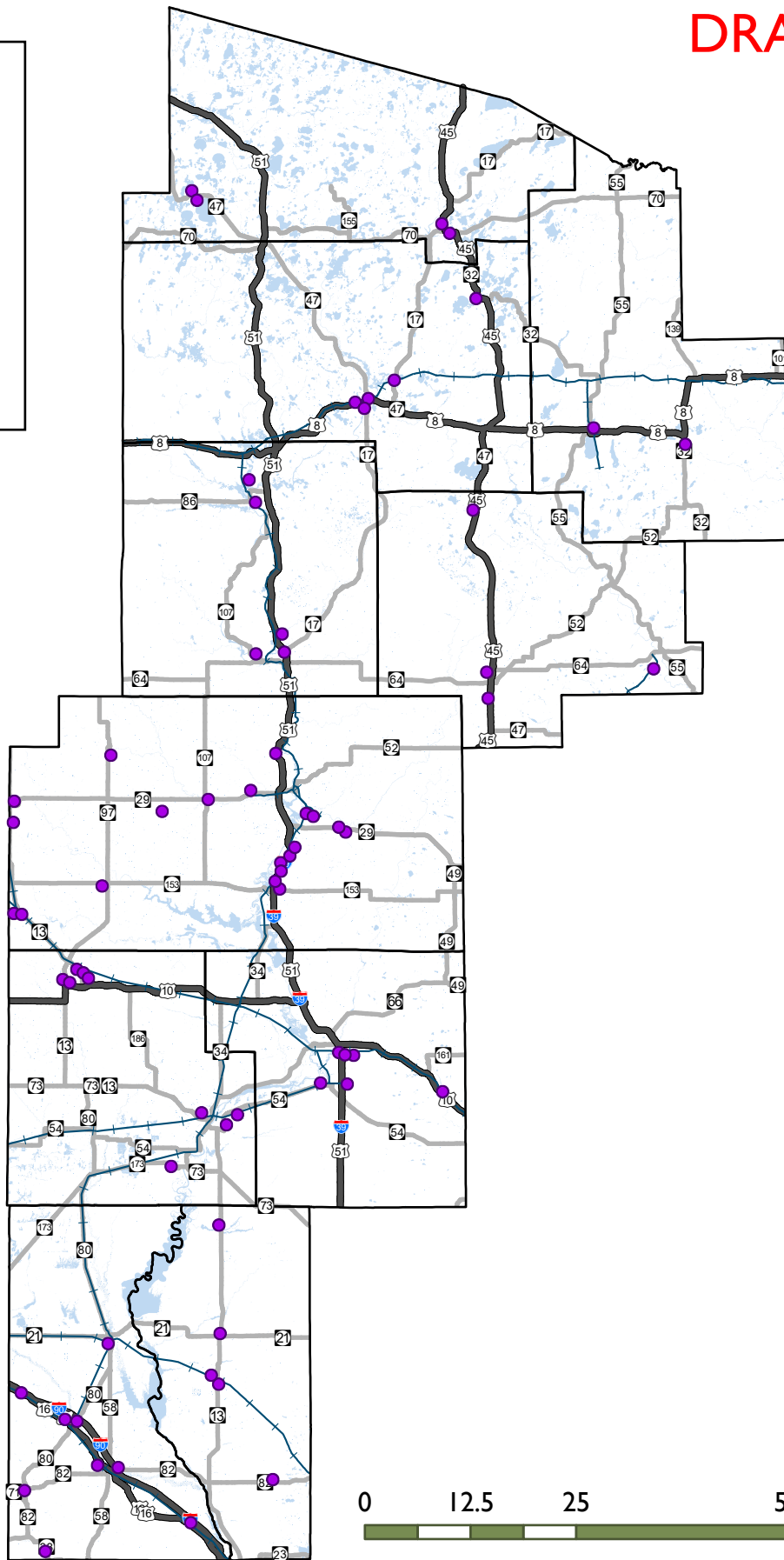


-  US Highways
-  State Highways
-  Railroad
-  Business & Industrial Parks
-  Water



Source: WI DNR, WisDOT, NCWRPC

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210 McClellan St., Suite 210, Wausau, WI 54403  
715-849-5510 - [staff@ncwrpc.org](mailto:staff@ncwrpc.org) - [www.ncwrpc.org](http://www.ncwrpc.org)

0 12.5 25 50  
Miles

# Appendix A

# NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION

210 McClellan Street, Suite 210, Wausau, Wisconsin 54403

Telephone: 715-849-5510 Fax: 715-849-5110

Web Page: [www.ncwrpc.org](http://www.ncwrpc.org) Email: [staff@ncwrpc.org](mailto:staff@ncwrpc.org)



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## CEDS COMMITTEE MEETING #1 AGENDA:

TIME: 2:00 P.M.

DATE: Thursday, July 17, 2025

PLACE: Microsoft Teams Meeting

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_MTQ0NzMxMWItZDU1OS00ZjM0LTgyZmYtZDI5M2ViMmY1MGFl%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MTQ0NzMxMWItZDU1OS00ZjM0LTgyZmYtZDI5M2ViMmY1MGFl%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d)

1. Introductions
2. Overview of CEDS Process
3. Impact of EDA
4. Review of Chapter 2: Demographics and Employment
5. Next Meeting
6. Adjournment

## CEDS Meeting #1 Notes

### **Comprehensive Economic Development Strategy Steering Committee Meeting 1 Summary**

**Date:** July 17, 2:00-3:00 PM

**Place:** Virtual via Microsoft Teams

**Committee Attendees:** Angie Close, Jason Grueneberg, Sara Guild, Elizabeth Haskovec, Tamaya Jo Loewe, Paul Millan, Tony Pharo, Holly Tomlanovich, Tommy Wartman, Kimm Weber

**Staff Attendees:** Dennis Lawrence, Eric Sonnleitner

#### Meeting Overview:

- The meeting started off with introductions
- NCWRPC staff provided a brief overview of the CEDS planning process. It was established that this committee will meet three times as part of the process and meetings will involve an overview of data, SWOT Analysis, and Goal development.
- NCWRPC staff highlighted the purpose of the CEDS document – provide information on key data, develop strategies, identify potential projects; create an economic development strategy for the Region; build capacity and guide the economic prosperity and resiliency of the Region; and maintain the Region’s designation as an EDD and eligibility for EDA funding
- Staff provided an overview of the impact that the EDA has had on the Region. EDA has invested over \$33 million in funding (with 48 total projects funded) in the North Central Wisconsin Region since the NCWRPC’s designation as an EDD. Since 2018, EDA has invested over \$13 million in the Region.
- Staff provided an overview of key demographic and employment data. Four areas were examined: Population and Labor Force, Business Environment, Industry Employment, and Occupation Employment.
- Population and Labor Force data examined included: Total Population, Population Projections, Age Distribution, Educational Attainment, Share of Population with an Associate’s Degree or Higher, Program Completions, Labor Force Status, Employment, and Unemployment.
- Business Environment data examined included: Total Business Establishments and Annual Business Startups.
  - Committee members suggested adding data for business closures to this section.
  - Committee members also suggested exploring ways to filter out businesses that simply changed hands or are held by holding companies in the business start-ups data.

- Industry Employment data examined included: Employment by 2-Digit NAICS Code; Average Annual Wage by 2-Digit NAICS Code; Employment Total, Concentration, and Change in Employment by 2-Digit NAICS Code; identification of key industry subsectors (3-Digit NAICS Code), and Employment Total, Concentration, and Change in Employment for key industry subsectors.
  - Committee members highlighted that the timber/logging industry is struggling with a number of mills and lumber yards closing in recent years.
  - Committee members also highlighted the relative instability of the health care industry
- Occupation Employment data examined included: Share of Employment by SOC High-Level, Regional Employment by SOC 2-Digit Occupation Group, Regional Median Annual Wage by SOC 2-Digit Occupation Group, and Regional Employment Total, Median Wage, and Change in Employment by SOC 2-Digit Occupation Group.
- Staff concluded the meeting by mentioning that they will send a Doodle Poll to identify dates/times for the next meeting, likely in September.

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Telephone: 715-849-5510 Fax: 715-849-5110  
Web Page: [www.ncwrpc.org](http://www.ncwrpc.org) Email: [staff@ncwrpc.org](mailto:staff@ncwrpc.org)



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## CEDS COMMITTEE MEETING #2 AGENDA:

TIME: 2:00 P.M.

DATE: Wednesday, October 8, 2025

PLACE: Microsoft Teams Meeting

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_OWVINTgwYWQtYmM3Yi00YzExLThlZGYtOGE4MDE5ZWU2ZGU2%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_OWVINTgwYWQtYmM3Yi00YzExLThlZGYtOGE4MDE5ZWU2ZGU2%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d)

1. Follow-up from Meeting 1
2. Overview of Chapter 3 – Economic Conditions
3. Overview of Chapter 4 – Existing Infrastructure
4. Overview of Chapter 6 – Economic Development Resources
5. SWOT Analysis
6. Next Meeting
7. Adjournment

## CEDS Meeting #2 Notes

### **Comprehensive Economic Development Strategy Steering Committee Meeting 1 Summary**

**Date:** October 8, 2:00-3:00 PM

**Place:** Virtual via Microsoft Teams

**Committee Attendees:** Angie Close, Sara Guild, Elizabeth Haskovec, Angel Laidlaw, Tony Pharo, Holly Tomlanovich, Tommy Wartman, Kimm Weber

**Staff Attendees:** Dennis Lawrence, Eric Sonnleitner

#### Meeting Overview:

- The meeting started off with an overview of Meeting 1
- NCWRPC staff provided an overview of Chapter 3 – Economic Conditions. Data was examined for the following economic topics: Income & Poverty, Tourism, Housing, Broadband, and Gross Regional Product (GRP)
  - Income & Poverty data examined: median household income, income distribution, poverty, and poverty by race
  - Tourism data examined: direct visitor spending, tourism supported jobs, and the total economic impact of Tourism
    - Committee members suggested looking into why Adams County has had such a drastic decrease in direct visitor spending, especially with the recent expansion of Sand Valley. Adams County's decrease in visitor spending is in contrast to the growth experienced in the Region.
  - Housing data examined: monthly housing cost distribution, monthly housing cost burden, and housing sales trends
  - Broadband data examined: broadband accessibility and broadband adoption
  - Changes in GRP were examined for the Region and its counties, as well as the State
    - Committee members highlighted the slow growth in GRP experienced in Wood County in contrast to the strong growth experienced elsewhere in the Region & State. The closure of the Wisconsin Rapids paper mill in 2021 was mentioned as a potential cause of this.

- NCWRPC staff provided an overview of Chapter 4 – Existing Infrastructure. Infrastructure was grouped into two categories: Transportation and Utilities.
  - Transportation Infrastructure examined: Highway network (Interstate & Federal Highways, State Highways, County Highways), Transit, Airports, Railroads, and Bicycle & Pedestrian Facilities
    - Committee members mentioned that Merrill & Langlade County have on-demand Transit services. NCWRPC will adjust transit section in document accordingly.
  - Utilities Infrastructure examined: Water & Wastewater facilities, Energy facilities, Telecommunications, and Business & Industrial Parks
    - Committee members mentioned the potential new ATC transmission line project proposed in Lincoln and Marathon Counties.
    - Committee members suggested adding information about the BEAD broadband expansion efforts and table of awards by county.
- NCWRPC Staff provided an overview of Chapter 6 – Economic Development Resources. Economic Development Resources are grouped into four categories, Federal, State, Regional, and Local
  - Committee members suggested adding the WI Dept. of Revenue & UW-Extension to list of resources
- Committee & Staff members proceeded to begin conducting a SWOT Analysis. An overview of the SWOT discussion starts on the next page.



## SWOT Analysis Notes

- Due to time constraints, only Strengths & Weaknesses were discussed at this meeting, and Opportunities & Threats will be discussed to begin the next meeting.
  - Committee members suggested grouping similar Strengths into categories (workforce strengths, recreation strengths, etc.) This could be repeated for the other components of the SWOT Analysis as well.
- Topics discussed during Strengths discussion:
  - Investments and Collaboration in Forestry industry (WIST, UWSP Forestry program, Langlade County Training Facility WIG Grant)
  - Desirable pace of life
  - Outdoor Recreation
  - Safe place to live
  - Low cost of entry to start a business
  - Strong food & agriculture processing industries
  - Retirees – source of knowledge, volunteerism, community involvement, resources, etc.
  - Region has a positive “Northwoods” reputation
  - Region is desirable – people want to be here
  - Health care options – while there are quality healthcare options in the Region, accessibility in rural areas and a lack of doctors, nurses, and other medical staff could all be considered as weaknesses or threats
- Topics discussed during Weaknesses discussion:
  - Distance to major airports poses difficulties for business attraction efforts
  - A lack of pre-existing infrastructure in place to attract businesses
  - Rural Health Care (especially in regards to capacity & prices)
  - Childcare access in rural communities
  - Aging housing stock
  - Attractiveness of the Region for younger populations
  - Drinking water quality
  - Shortage of available land that is ready for development
  - Lack of training resources for elected officials
  - Lack of financial resources
  - Perception issues with economic opportunities available
  - Shortage of experienced staff for local governments
  - Slow population growth

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## CEDS COMMITTEE MEETING #3 AGENDA:

TIME: 2:00 P.M.

DATE: Thursday, December 11, 2025

PLACE: Microsoft Teams Meeting

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_YzMwNTkxNDYtNTZlYi00MTAyLWJmODktNWRlMjRlMjBkZGM4%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YzMwNTkxNDYtNTZlYi00MTAyLWJmODktNWRlMjRlMjBkZGM4%40thread.v2/0?context=%7b%22Tid%22%3a%224dae71f8-b9e6-48b6-9620-e744f685c37f%22%2c%22Oid%22%3a%22ea391340-29cb-4237-8487-9457b5b7594c%22%7d)

1. Follow-up from Meeting 2
2. SWOT Analysis – Opportunities & Threats
3. Overview of Chapter 7 – Regional Strategy
  - 3.1 Review & Establish Goals
  - 3.2 Establish Action Plan
4. Discuss Next Steps
5. Adjournment

## CEDS Meeting #3 Notes

### **Comprehensive Economic Development Strategy Steering Committee Meeting 1 Summary**

**Date:** December 11, 2:00-3:00 PM

**Place:** Virtual via Microsoft Teams

**Committee Attendees:** Angie Close, Jason Grueneberg, Sara Guild, Paul Millan, Tony Pharo, Holly Tomlanovich, Tommy Wartman, Kimm Weber

**Staff Attendees:** Dennis Lawrence, Eric Sonnleitner

#### Meeting Overview:

- The meeting started off with an overview of Meeting 2
- Committee & Staff members proceeded to finish conducting the SWOT Analysis by identifying Opportunities & Threats. An overview of this discussion is available at the end of this summary.
- Committee & Staff members then reviewed the goals, objectives, and policies section as well as the Action Plan.
  - Most goals from previous CEDS updates were deemed to be still appropriate for the Region and were left unchanged.
  - Changes determined by the Committee included adding an objective stating the need to continue maintaining and improving our water, sewer, and street networks (Goal 6), and adding an objective that captures the need to ensure we have the capacity for emerging technologies (Goal 7).
  - The Action Plan was deemed to still be appropriate for the Region, with minor changes to reflect changes that have taken place in the Region since the last CEDS update.
    - Changes included changing Action 5 in Goal 2 to reflect Central WI Economic Development Fund (CWED) effectively replacing the North Central WI Development Corporation as the regional source of revolving loan funds in the Region.
- The meeting closed with an overview of the next steps of the process, which involve the plan review process, and the anticipated adoption of the plan in late January 2026.

## SWOT Analysis Notes

- The Committee discussed Opportunities & Threats at this meeting after discussing Strengths & Weaknesses at the prior meeting. A brief overview of Strengths & Weaknesses was provided at the start of this discussion.
- Topics discussed during Opportunities discussion:
  - Current trend of people leaving urban areas for rural areas is an opportunity for the Region to attract workforce
  - The Region has an opportunity to capitalize on the Region's timber resources and existing construction affiliated businesses to help address housing shortages
  - The Region has an opportunity with the Service Industry & Trades, as there will be an increased need for service-related jobs and services as the Region's population ages.
  - Tourism provides several opportunities for the Region, including: the Great Pinery Heritage Waterway, Sand Valley, and the premier destinations for outdoor recreation and visiting that the Region can offer. Vacation Rentals by owner also provide an opportunity (and a threat) to the Region.
  - The central location of the Region makes it an ideal location for events, and can increase the desirability of the Region for prospective residents.
- Topics discussed during Threats discussion:
  - Vacation rentals by owner was listed as both an opportunity and a threat to the Region. If not properly regulated, these can harm the Region's environment, especially in regards to proximity to lakes and waste/septic disposal & management
  - Reliance on seasonal tourism is a threat to the region, especially during the winter months, as many seasonal tourism activities are dependent on the weather
  - Lack of shipping facilities in rural areas
  - The national economic uncertainty can lead to unpredictable funding
  - The clustering of renewable energy sources can lead to the conversion of productive farmlands into renewable energy generation sites, and can lead to a loss of natural habitats within the Region.
  - The potential impact of data centers on the electrical grid poses a threat to the Region's infrastructure.
  - Health care access issues such as a lack of dental, vision, & behavioral health care pose a threat to residents, especially in rural areas. Health care facilities are mostly concentrated in the more urbanized areas within the Region, which can lead to long waits & commutes for appointments. The lack of healthcare staff also poses a threat to the Region.
  - Lack of childcare access poses a threat to the Region in terms of attracting & retaining residents and workers, which can negatively impact the Region's employers.

- There is an increased need for alternative transportation options in the Region.
  - The Region has a high dependence on vehicle ownership
  - There is a lack of on-demand transportation services available in the Region.
  - There are high costs associated with vehicle ownership
  - The impact of a lack of transportation alternatives can lessen the Region's ability to support aging in place
- There are water quality and access concerns that threaten the Region in the future if not properly mitigated, especially in regards to contamination issues like PFAS.

# Appendix B

# NCWRPC 2026 CEDS

## Five-Year Update