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NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION  
**ECONOMIC DEVELOPMENT ASSESSMENT REPORT**



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# AGRICULTURE

# INTRODUCTION

The Economic Development Assessment Report is one of four reports prepared as part of the overall Regional Livability Plan effort undertaken by the North Central Wisconsin Regional Planning Commission. Each of the Assessment Reports focuses on the foundational topics of Housing, Economic Development, Transportation and Land Use. These four reports along with demographic data will form the basis for the overall Regional Livability Plan in North Central Wisconsin.

This Assessment Report examines economic development on a regional scale. The business and employment mix, in part, defines the Region. Economic Development is an important component of any planning effort, be it at the local or regional level. Economic Development is a crucial component of livability and impacted by the housing, transportation, and land use of the Region. In addition to explaining the current population, education, and employment conditions in the Region, this report will also observe projections for the future. Further, this report will study the Region's economic strengths and weaknesses in the context of industry trends and emerging industry clusters.

Balancing the needs of diverse communities with different economic development issues requires that each situation be considered individually, but that a uniform standard of service be applied, and that each community seeks the solution which fits the unique challenges that it faces. This planning process will strive to identify various goals, objectives and performance measures to advance the Region's economic development efforts.

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# 1 BACKGROUND

*North central Wisconsin's diverse natural and agricultural resources were the original basis of the economy, whether it was the fertile soils of the central and southern areas or the vast forests of the north. As more people settled in the Region, they developed roads, railroads, and dams for power. This new infrastructure, in turn, expanded the economy beyond simple farming and logging operations. Resources that once left the Region in their "raw" state were now transformed into finished products here. Communities like Rhinelander, Merrill, Wausau, Stevens Point, and Wisconsin Rapids capitalized on their location to form value added industries focused on wood products, agriculture, and manufacturing. As these industries progressed, so did the service-oriented industries such as government, transportation, communications, public utilities, trade, finance, insurance, and real estate. The result is the wide diversity of economic activity that we see in the Region today.*

Assessing the state of economic development and the degree to which it is meeting the needs of both the businesses and workforce require knowledge of past and present conditions, but also a sense of future workforce demand and industries the Region can target for future growth. Understanding these strengths and weaknesses allows the Region to bridge those gaps, prepare our workforce for future employment opportunities, and attract businesses that can be successful in our Region. Understanding future workforce and industries will help shape where future businesses are located, the types of businesses in our communities, and where people will live.

The proximity in which people live to where they work will have a huge impact on livability and the transportation necessary to get people to and from work. Living in close proximity to work provides workers with transportation alternatives resulting in less demand on the transportation infrastructure. A shorter commute also enhances the Region's economic competitiveness attracting new employees to the Region's workforce. Research indicates that the future workforce, those born between 1981 and 2000, wants to live in walkable areas around the urban core in close proximity to employment opportunities.<sup>1</sup>

The North Central Region is large and diverse in its economy. In order to present a more detailed assessment of the economy, the ten counties have been split into 3 sub-regions. The northern five counties are heavily forested and include a number of forestry related industries. The northern sub-region also includes a number of tourism related businesses due to the number of lakes and winter activities. The three central counties include more agricultural industries and have a strong presence in manufacturing. The central sub-region has high employment in machinery manufacturing and paper manufacturing. The two southern counties are more rural and are heavily dependent on agricultural industries, but have shown an increase in tourism based industries

The past decade (2000-2010) has been challenging for the economy throughout the nation and within the Region. A

lack of business growth has resulted in high unemployment numbers. As manufacturers become more efficient and the paper industry continues to decline, the Region has seen a high number of layoffs and unemployment. The regional workforce has been forced to adapt to industry changes learning new skills in an effort to find gainful employment to support their families. Over the last decade, the Region lost over 6,500 jobs. The decline in job opportunities has resulted in low population growth as workers are moving out of the area for employment opportunities. The lack of employment opportunities in the Region further decreases population growth as people looking to move to the Region are unable to find employment.

The Region's population has increased its median age over the past decade. As the workforce grows older, many skilled positions in manufacturing will be available due to retiring employees. From 2000 to 2010, the population over 65 increased 1.7 percent and future projections show that by 2035, 33 percent of the Region's population will be over 60 years of age. As these workers retire, employment opportunities will open, but the Region currently lacks the youth demographic to fill these positions in the future. From 2000 to 2010, the Region's 17 and under population decreased 2.9 percent and future projections show the Region's youth population growing 6 percent slower than the state over the next 22 years. A highly educated, skilled and knowledgeable workforce is key in the retention, expansion and attraction of business and is vital to livability in the Region.

The Region does show promise in a number of industries over the next 10 years. Although manufacturing projects a small decrease in total employment, manufacturing will continue to be a major employer in the Region. The Region also shows an increase in healthcare employment, transportation employment and finance and insurance. The increase in additional industries will help diversify the workforce in the Region and eliminate dependency on manufacturing, better protecting the Region in the future.

<sup>1</sup> Urban Land Institute. "What's Next? Real Estate in the New Economy." 2011

## A Population

The 2010 overall regional population is 441,822. Five of the ten counties experienced a decline in population, although the Region as a whole did increase about 2.5 percent from 2000 to 2010. This is a much slower growth than the previous decade where all ten counties increased. Juneau County had the largest percent of population growth between 2000 and 2010 with an increase of 9.66 percent. It is important to note that the US Census does not track seasonal residents in their population counts. Therefore, there may be times throughout the year where counties may experience a much higher population than recorded through the US Census.

The 30 year historic growth rate shows that the North Central Region tracks with the trends of the state and nation. However, in the past decade, the north and central fell below the state's growth rate and all three sub-regions fell well below the national rate of growth. Overall, the Region follows the trends of the state and nation, but at a lower level and with more drastic changes.

In terms of total population, Marathon County's 2010 population of 134,063 people makes up 30 percent of the Region's population. Wood County with 74,749 and Portage County with 70,019 follow as second and third in terms of the Region's populations. Combined, these three counties represent 63 percent of the Region's population. The remaining seven counties are very rural in character with populations ranging from about 9,000 to 36,000.

**TABLE 1 | Population 1980 - 2010**

County	1980	1990	2000	2010	% Change 1980 - 1990	% Change 1990 - 2000	% Change 2000 - 2010
ADAMS	13,457	15,682	19,920	20,875	16.5%	27.0%	4.8%
FOREST	9,044	8,776	10,024	9,304	-3.0%	14.2%	-7.2%
JUNEAU	21,037	21,650	24,316	26,664	2.9%	12.3%	9.7%
LANGLADE	19,978	19,505	20,740	19,997	-2.4%	6.3%	-3.7%
LINCOLN	26,555	26,993	29,641	28,743	1.6%	9.8%	-3.0%
MARATHON	111,270	115,400	125,834	134,063	3.7%	9.0%	6.5%
ONEIDA	31,216	31,679	36,776	35,998	1.5%	16.1%	-2.1%
PORTAGE	57,420	61,405	67,182	70,019	6.9%	9.4%	4.2%
VILAS	16,535	17,707	21,033	21,430	7.1%	18.8%	1.9%
WOOD	72,799	73,605	75,555	74,749	1.1%	2.6%	-1.1%
REGION	379,311	392,402	431,021	441,822	3.5%	9.8%	2.5%
NORTH	103,328	104,660	118,214	115,452	1.3%	13.0%	-2.3%
CENTRAL	241,489	250,410	268,571	278,831	3.7%	7.3%	3.8%
SOUTH	34,494	37,332	44,236	47,539	8.2%	18.5%	7.5%
STATE	4,705,642	4,891,769	5,363,715	5,688,040	4.0%	9.6%	6.0%
UNITED STATES	226,545,805	248,709,873	281,412,906	308,745,538	9.8%	13.2%	9.7%

SOURCE: US Census, NCWRPC

### Population Projections

The population projections show that north central Wisconsin can expect a growth in population for the next two decades. These projections show that the highest rate of population growth will occur between 2010 and 2015. The northern region will show the highest rate at 11.2 percent and the entire Region will have a higher rate of growth than the state. Tracking with the state trend, the Region will see a slow rate of growth from 2015 to 2035. The rate of growth for the Region will go from 2.9 percent in 2015 to 1.1 percent in 2035. During that period, the Region will grow at a slower rate than the state, and Forest and Wood counties are shown to lose population.

**TABLE 2 | Population Projection**

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

SOURCE: US Census, NCWRPC, Wisconsin Department of Administration

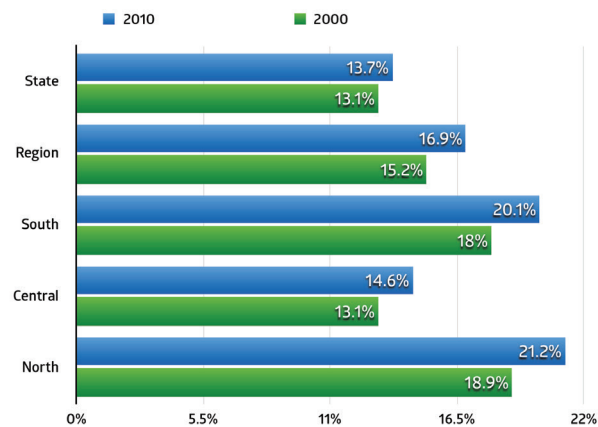
### Population Age

According to The Bureau of Labor and Statistics, the baby-boom generation will move entirely into the 55-years-and-older age group by 2020. This has been shown in the Region as the percent of population over 65 years of age increased from 15.2 percent to 16.9 percent of the population from 2000 to 2010. Future population projections show the 60 years and older demographic increasing at a rate of 61.6 percent from 2010 to 2035 and the 85+ demographic increasing 85 percent over the 25 year time period.

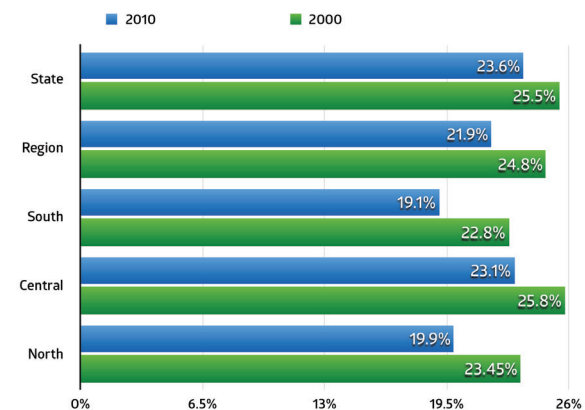
By 2035, the Region will have 172,130 people aged 60 and older, making up 33 percent of the Region’s population compared to 23 percent in 2010. The north and south sub-regions will be impacted the most by the increase in the older demographic, as projections show a negative rate of growth in population aged 59 and younger.

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

**FIGURE 1 | Percentage of Population Over 65**



**FIGURE 2 | Percentage of Population Under 17**



SOURCE: US Census, 2000, 2010

## Net Migration

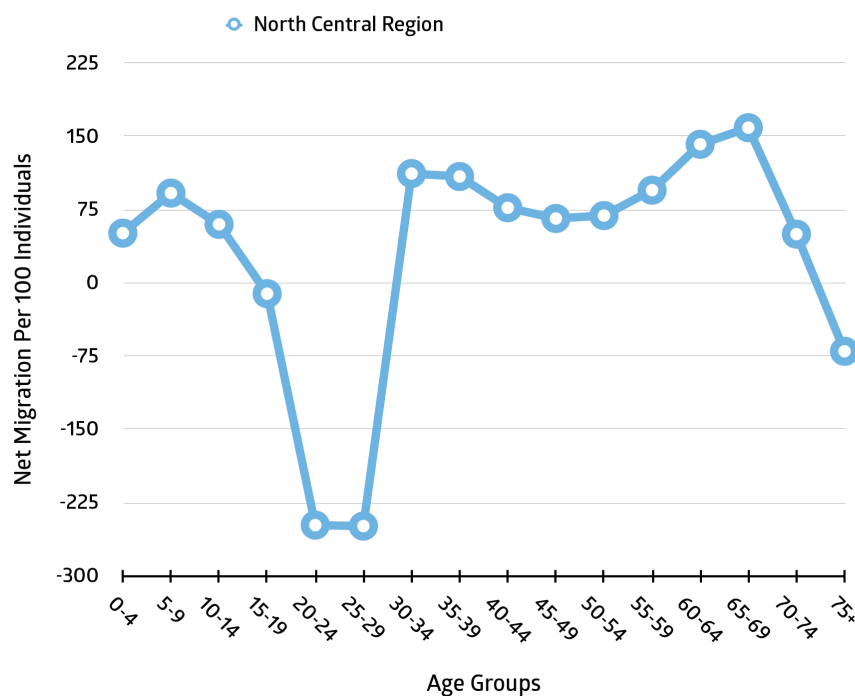
The Region’s increase in median age, the growing population of individuals 65 and over, and the decrease in individuals 17 and under can be attributed to a number of variables. People having children later in life (natural increase), people living longer lives, and individuals moving to and from the Region all have a significant impact on the Region’s population and workforce.

From 2000 to 2010, the Region experienced a significant negative net migration by those ages 20-29. For every 100 people in the Region aged 20 to 29, roughly 250 left the Region. This negative net migration has a large impact on the Region’s workforce, as the 20 to 29 age group are considered “prime working years”. The Region experienced a positive net migration by individuals 30 to 39. This age group is typically looking for a place to raise a family and settle down. The positive net migration in this age group also helps explain the positive net migration in the 0 to 19 age group as those 30 to 39 typically move with children. The Region experienced a large net migration positive in those aged 30 and over peaking in the 65 to 69 age group where the net migration rate is 165. This positive net migration in the older demographic helps explain the increase in population 65 and older.

The combination of an existing aging population and a migration increase in individuals over 65 will result in an increasing demand on infrastructure and services within communities. As positions become vacant due to an aging workforce retiring, the Region will lack the population to fill these positions due to a negative net migration of key workers in the 20 to 29 age group. This will have a great impact on recruiting new industries to the Region, the ability to pay for programs and services needed by an aging population, and the ability to retain and expand existing industries.

Overall, the Region experienced a positive net migration of 504 individuals per 100 from 2000 to 2010, a large majority aged 55 and older.

FIGURE 3 | Net Migration Rates by Age



SOURCE: <http://www.netmigration.wisc.edu/>

## B Population & Labor Force

The total regional labor force is related to the overall population, 16 years of age and older employed or actively pursuing employment. Research by UW Madison indicates that a strong correlation occurs between population growth and job growth. As population in an area increases, job growth increases at a similar pace. Based on this research, the counties with the highest population growth will also experience the highest creation of jobs and employment in the Region. In 2011, the population was 442,286 and the labor force was 235,025.

Much of the growth in the Region's labor force has been due to the increase in

the population. In 1980, only 61 percent of the population over 16 was in the labor force. By 2000, that rate increased to 67 percent and has remained steady through 2011 at 65.8 percent. The central counties have the Region's highest participation rates. Marathon (71.4%), Portage (68.8%) and Wood (66.2%) also make up 64 percent of the Region's total population; have the lowest percentage of residents over 65 years of age and the highest percentage of residents under 17. Adams County has the lowest participation rate (50.5%) in the Region and the highest unemployment rate at 9.3 percent. Only two counties, Marathon and Portage exceeded the state's 68.7 percent participation rate in 2011.

TABLE 3 | Population and Labor Force

County	Population over 16 years of age	Labor Force	Participation Rate	Unemployment
ADAMS	17,893	9,036	50.5%	9.3%
FOREST	7,670	4,194	54.7%	8.0%
JUNEAU	21,526	13,693	63.6%	8.5%
LANGLADE	16,394	10,398	63.4%	7.6%
LINCOLN	23,562	15,222	64.6%	6.1%
MARATHON	104,597	74,641	71.4%	6.7%
ONEIDA	30,380	18,771	61.8%	6.3%
PORTAGE	56,942	39,180	68.8%	6.7%
VILAS	18,406	10,490	57.0%	9.2%
WOOD	59,550	39,400	66.2%	6.9%
REGION	356,920	235,025	65.8%	
UNITED STATES	4,487,568	3,084,116	68.7%	7.1%

SOURCE: American Community Survey 2007 - 2011

## C Education

Educational attainment levels have increased substantially in the Region from 1990 to 2010. In 1990, only 75.5 percent of the population 25 and over had completed four years of high school or more. By 2010, that rate increased to 88.7 percent. All three sub-regions also have seen a substantial increase in high school educational attainment levels. In 2010, the north sub-region had the highest percentage of population who has completed four years of high school, followed by the central and south. Compared to the state, the Region lags behind slightly, but that gap has narrowed from a 5.0 percent deficit in 1990 to a 1.7 percent deficit in 2010.

The rate of persons with a bachelor degree or better is also increasing, but the Region still lags behind the state and the gap is widening. In 1990, 13.3 percent of the Region had a bachelor's degree, compared to the state rate of 18.3 percent for a difference of 5.0%; meanwhile by 2010 the Region was 19.8 percent to the state's rate of 25.8 percent for a difference of 6.0%. Educational attainment levels for those who have completed a bachelor degree or better did increase significantly for the Region despite the fact it lagged behind the state. All three sub-regions also have seen a significant increase in post-secondary educational attainment levels. In 2010, the central sub-region had the highest educational attainment rate, followed by the north and south.

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



**TABLE 4** | Persons Who Have Completed Four Years of High School

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

SOURCE: US Census, NCWRPC

**TABLE 5** | Persons Who Have Completed Four or More Years of College

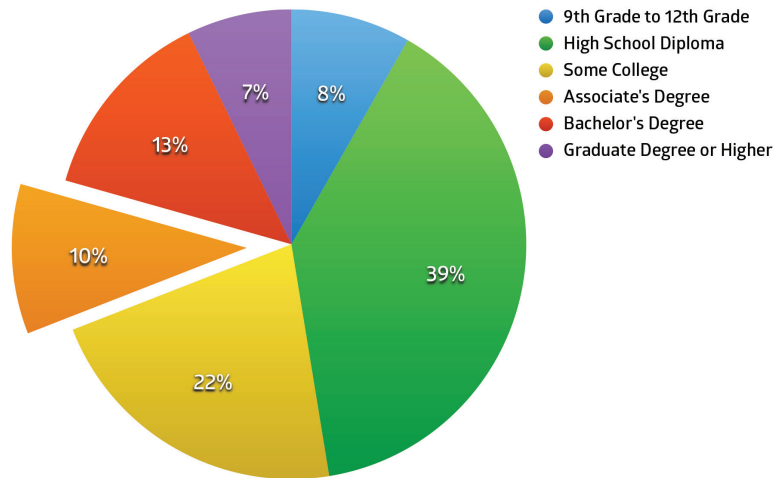
County	1980	1990	2000	2010	2000 Percent	2010 Percent	2000 - 2010 Net Change
ADAMS	645	842	1,369	1,744	10.00%	10.80%	1,099
FOREST	415	429	671	793	10.00%	12.00%	378
JUNEAU	979	1,222	1,682	2,264	10.20%	12.10%	1,285
LANGLADE	1,011	1,139	1,682	1,865	11.70%	12.90%	854
LINCOLN	1,541	1,903	2,732	3,050	13.60%	14.70%	1,509
MARATHON	7,267	9,736	14,994	18,492	18.30%	20.80%	11,225
ONEIDA	2,566	3,301	5,280	6,065	19.90%	22.40%	3,499
PORTAGE	5,097	6,701	9,378	11,646	23.40%	27.10%	6,549
VILAS	1,285	1,753	2,754	4,203	17.60%	25.00%	2,918
WOOD	4,666	6,315	8,486	9,946	16.90%	19.20%	5,280
REGION	25,472	33,341	49,028	60,068	17.20%	19.80%	34,596
NORTH	6,818	8,525	13,119	15,976	15.80%	18.60%	9,158
CENTRAL	17,030	22,752	32,858	40,084	19.10%	21.80%	23,054
SOUTH	1,624	2,064	3,051	4,008	10.10%	11.50%	2,384
STATE	401,076	547,687	779,273	1,001,353	22.40%	26.30%	600,277

SOURCE: US Census, NCWRPC

## D Vocational & Technical Education

Worker productivity has often been cited as one important reason for the strength of Wisconsin's economy. Education and training are critical to maintaining that productivity, as well as keeping our Region competitive. The vocational-technical education system and the training available are of particular importance. As business and industry continues to grow and change, the demand for highly trained and skilled labor grows. The state provides a variety of initiatives to develop the workforce through education, training, and cooperative ventures with business and industry. Worker training programs are very important as the location mismatch between worker skills and available jobs continues to widen.

FIGURE 4 | Highest Education Level Completed



SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information

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

Partnerships between local businesses, governments, and educational institutions are very useful in developing the Regional economy. In 2013, roughly 10 percent of the Region's population had completed an associate's degree at a local institution (US Census). Institutions such as UW-Stevens Point, UW Marathon County and Wood County, Northcentral Technical College (NTC) (Wausau, Antigo, and Spencer), Midstate Technical College (Wisconsin Rapids, Adams, Stevens Point, and Marshfield), Nicolet College (Rhinelander and Minocqua), and Western Wisconsin Technical College (Mauston) often direct their programs to the training needs of local workers and businesses. The Region has two outreach centers: Wisconsin Learning Center (Stevens Point) and Northwest Wisconsin Manufacturing Outreach Center (UW-Stout campus). Organizations such as the North Central Wisconsin Workforce Development Board are important to this process as well. They offer training programs, business services, industry information and advocates the development, support, and coordination of an integrated service delivery system that develops a skilled workforce for a thriving economy in the Region.

## E Income Trends

There are two measures of income: median household income and per capita income. Median household income provides an indication of the economic ability of the typical family or household unit while per capita income provides a measure of relative earning power on a per person level. As identified in the Issues and Opportunities Element of this plan the median household income in 2010 was \$45,045 and the per capita income was \$25,012. Both median and per capita incomes have risen over the last thirty years, by 74 and 140 percent respectively. Both of these rates exceed state growth rates for the same time period.

The U.S. Bureau of Economic Analysis ranked Wisconsin 25th in the nation with respect to personal per capita income; this has remained steady from a ranking 24th in 1980. While Wisconsin is not among the wealthiest states in the nation, it does rank in the top half. The Region increased in per capita income slightly more than the state, but both fared far better than the nation as a whole. Over the last thirty years within the Region, Forest County showed the highest gain in per capita income while Lincoln County showed the lowest. Income gains were relatively uniform in each sub-region however.

**TABLE 6** | Median Household Income

County	1980	1990	2000	2010	2000-2010 % Change*	1980-2010 % Change*	1980 - 2010 Net Change
ADAMS	\$12,990	\$21,548	\$33,408	\$39,885	-7.20%	16.00%	\$26,895
FOREST	\$11,214	\$16,907	\$32,023	\$37,627	-9.10%	26.80%	\$26,413
JUNEAU	\$12,528	\$22,073	\$35,335	\$45,664	2.60%	37.70%	\$33,136
LANGLADE	\$12,738	\$20,703	\$33,168	\$41,034	-2.90%	21.70%	\$28,296
LINCOLN	\$14,267	\$25,175	\$39,120	\$46,625	-7.40%	23.50%	\$32,358
MARATHON	\$17,344	\$30,143	\$45,165	\$53,471	-8.20%	16.50%	\$36,127
ONEIDA	\$14,521	\$23,901	\$37,619	\$45,857	-4.70%	19.30%	\$31,336
PORTAGE	\$16,659	\$28,686	\$43,487	\$51,456	-8.30%	16.70%	\$34,797
VILAS	\$12,373	\$20,352	\$33,759	\$41,631	-3.30%	27.10%	\$29,258
WOOD	\$17,482	\$29,735	\$41,595	\$47,201	-13.10%	2.00%	\$29,722
REGION	\$15,737	\$26,871	\$40,538	\$48,302	-7.50%	16.00%	\$32,656
NORTH	\$13,487	\$22,433	\$36,022	\$43,774	-5.10%	22.60%	\$30,287
CENTRAL	\$17,232	\$29,675	\$43,711	\$51,214	-9.50%	12.30%	\$33,982
SOUTH	\$12,708	\$21,853	\$34,470	\$43,055	-1.70%	28.00%	\$30,347
STATE	\$17,680	\$29,442	\$43,791	\$49,001	-14.70%	4.70%	\$31,321

SOURCE: US Census, ACS 2007 - 2011, NCRWPC \*Adjusted for Inflation

**TABLE 7** | Per Capita Income

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

SOURCE: US Census, ACS 2007 - 2011, NCRWPC \*Adjusted for Inflation

## F Employment

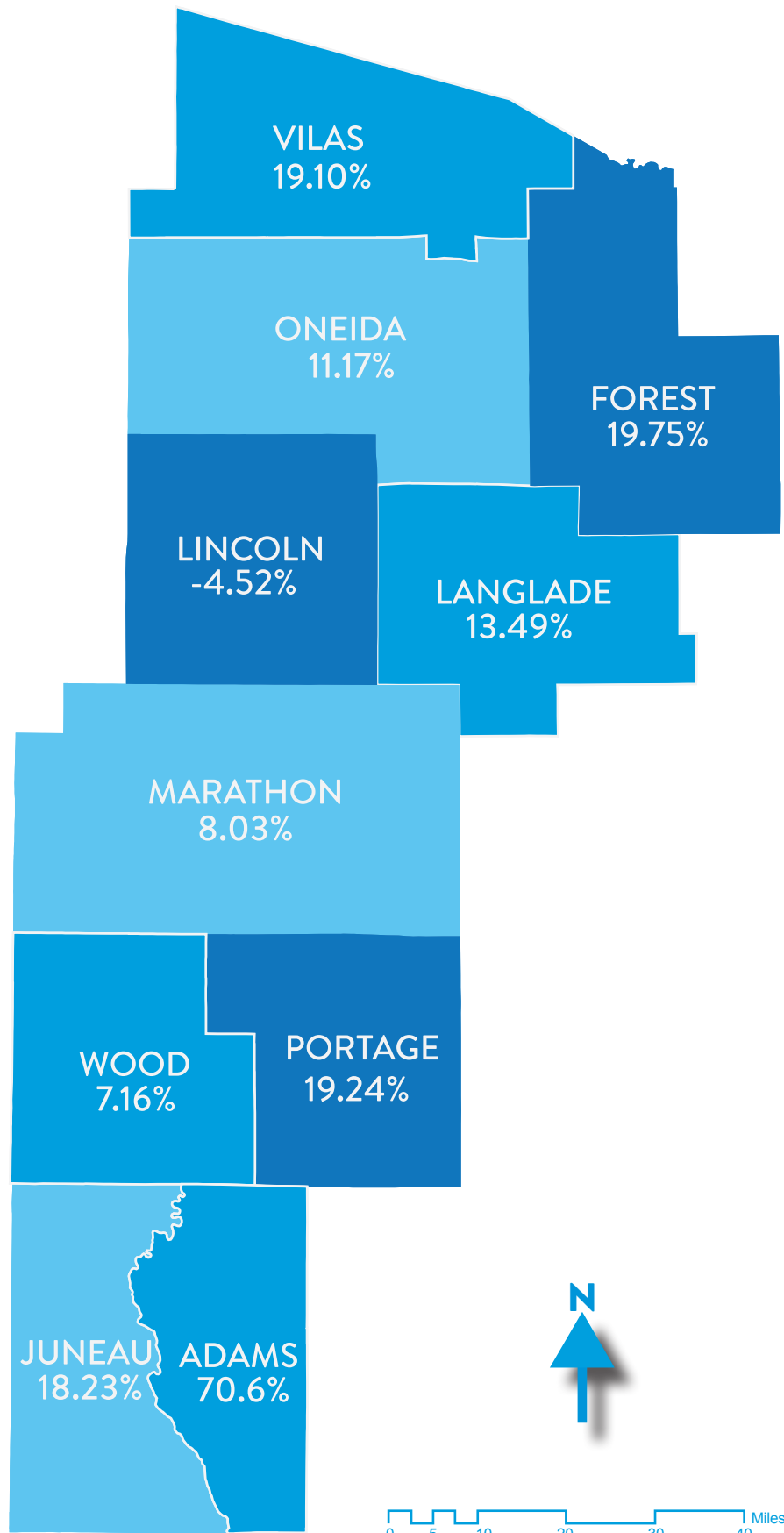
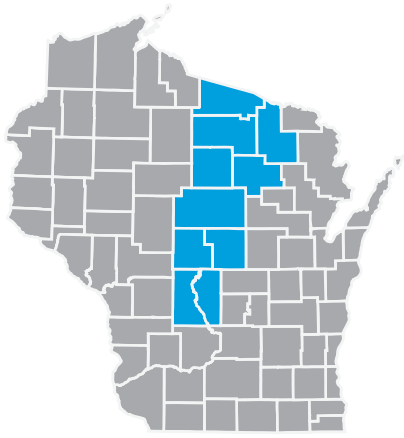
Between 2000 and 2013, North Central Wisconsin gained nearly 22,600 jobs, matching the States job growth rate at 11.4 percent. The majority of the regional job growth has occurred in the past two years. Between 2000 and 2011, the Region lost 6,947 jobs and had a negative job growth rate of 3.5 percent. Over the past two years, the Region has gained 29,544 jobs at a rate of 15.5 percent. All counties except Lincoln (-540) saw an increase in jobs over the past thirteen years. Adams County saw the largest job growth at 70.6 percent and seven of the ten counties saw double digit job growth. The central region gained the most jobs (14,153) between 2000 and 2013, but the south region saw the largest job growth at 33.6 percent. The Region's share of total state employment in 1980 was 6.6 percent, that share increased to about 7.3 percent in 2000, and has remained steady through 2013 at 7.4 percent.

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

TABLE 8 | Employment History

County	1980	1990	1980-1990 % Change	2000	1990-2000 % Change	2011	2013	2000-2013 % Change
ADAMS	2,168	2,643	21.91%	3,558	34.62%	4,240	6,070	70.60%
FOREST	1,826	2,060	12.81%	2,988	45.05%	3,075	3,578	19.75%
JUNEAU	5,345	7,195	34.61%	8,596	19.47%	8,590	10,163	18.23%
LANGLADE	5,275	6,439	22.07%	7,838	21.73%	7,250	8,895	13.49%
LINCOLN	7,793	9,795	25.69%	11,953	22.03%	9,923	11,413	-4.52%
MARATHON	40,051	49,407	23.36%	65,630	32.84%	63,735	70,900	8.03%
ONEIDA	9,943	12,192	22.62%	16,753	37.41%	15,064	18,625	11.17%
PORTAGE	18,632	24,821	33.22%	30,191	21.63%	31,039	36,000	19.24%
VILAS	3,758	4,428	17.83%	7,256	63.87%	6,544	8,642	19.10%
WOOD	29,811	36,172	21.34%	42,926	18.67%	41,282	46,000	7.16%
REGION	124,602	155,152	24.52%	197,689	27.42%	190,742	220,286	11.43%
NORTH	28,595	34,914	22.10%	46,788	34.01%	41,856	51,153	9.33%
CENTRAL	88,494	110,400	24.75%	138,747	25.68%	136,056	152,900	10.20%
SOUTH	7,513	9,838	30.95%	12,154	23.54%	12,830	16,233	33.56%
STATE	1,882,772	2,165,996	15.04%	2,684,824	23.95%	2,598,133	2,989,700	11.36%

MAP 1 | Percent Change Employment, 2000 - 2013



This map is neither a legally recorded map nor a survey and is not intended to be used as one. This drawing is a compilation of records, information and data used for reference purposes only. NCWRPC is not responsible for any inaccuracies herein contained.

Data Sources: Census 2010



**TABLE 9 | Unemployment Rate 1993 - 2012**

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

SOURCE: Wisconsin Department of Workforce Development, Bureau of Labor and Statistics, NCRWPC

## G Unemployment

The regional unemployment rate has increased over the past 22 years. Since 1993, the regional unemployment rate has mirrored the state and national unemployment rates hitting their lowest point in 1999 and their highest point in 2009. The Region’s unemployment rate has historically fallen below the national rate and above the state rate. This trend held true in 2012 as the Region’s unemployment rate of 7.8 percent was below the national rate of 8.1 percent and above the state rate of 6.9 percent.

Marathon, Portage and Wood counties, who make up the central sub-region, experienced the lowest unemployment in the Region in 2012. These are the three largest counties and the most economically diverse. Three of the five counties that make up the north sub-region have unemployment rates of 9.5 percent and none of the northern counties have unemployment rates below 8.7 percent. Adams County in the south sub-region has the Region’s highest unemployment rate of 9.9 percent. Only Portage County has a lower rate than the state and only the counties in the central sub-region have lower rates than the national rate. After a spike in unemployment between 2009 and 2010, the Region has experienced a steady decline in unemployment over the past two years.

**TABLE 10 | 2012 County Unemployment**

County	Unemployment Rate
ADAMS	9.90%
FOREST	9.50%
JUNEAU	8.70%
LANGLADE	8.70%
LINCOLN	9.50%
MARATHON	7.20%
ONEIDA	8.90%
PORTAGE	6.60%
VILAS	9.50%
WOOD	7.20%
REGION	7.80%
STATE	6.90%
UNITED STATES	8.10%

SOURCE: Wisconsin Department of Workforce Development, Local Area Unemployment Statistics



## H Employment by Sector

Ten basic economic sectors are presented in this section. They are: government; agriculture; forestry and fishing; mining; construction; manufacturing; transportation and utilities; wholesale trade; retail trade; finance, insurance and real estate; and healthcare. It should be noted that the number of employees in certain sectors, particularly those engaged in agriculture, forestry and fishing, may be understated because this information utilizes Department of Workforce development data; those who are self-employed or work in family businesses are not reflected in this data.

The regional employment by super sector declined 4.45 percent from 2001 to 2013. The Region saw a majority of that reduction of employment between 2001 and 2010 where the Region's employment decreased at a rate of 4 percent. Over the past three years, the Region has begun to improve showing a slight decrease in employment at -.5 percent. The Region's two biggest sectors, manufacturing and retail, have improved significantly in the past three years. Between 2001 and 2010, manufacturing and retail trade employment decreased 27 percent and 12.5 percent respectively. In the past three years, manufacturing and retail trade have improved to 1.54 percent growth and -.03 percent growth. After losing 12,040 manufacturing employees between 2001 and 2010, the Region added 499 employees in the past three years. All sectors with negative growth between 2001 and 2010 showed improvements between 2010 and 2013. However, of the sectors that showed a positive growth between 2001 and 2010, all but one (Management of Companies and Enterprises) showed a reduction in job growth between 2010 and 2013.

**TABLE 11 |** Regional Employment by Sector

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

SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information

## I Emerging Employment Projections (NAICS 2 Digit)

The Wisconsin Department of Workforce Development office of economic advisors prepared employment projections by sector for the Region. These projections can be seen in Table 11. The employment projections show a 7.34 percent increase in employment for the entire Region. These projections only look at job growth in the industry and do not calculate the future need to replace workers leaving the industry. Looking at the growth by sector it appears that health care will continue to be a growing sector in the regional economy, while manufacturing will continue a slow decline. Health care, transportation, and food services expect to add the most jobs, while education services, transportation, and health care expect to grow at the highest rates. The Region is projected to add 16,161 total jobs over the next ten years.

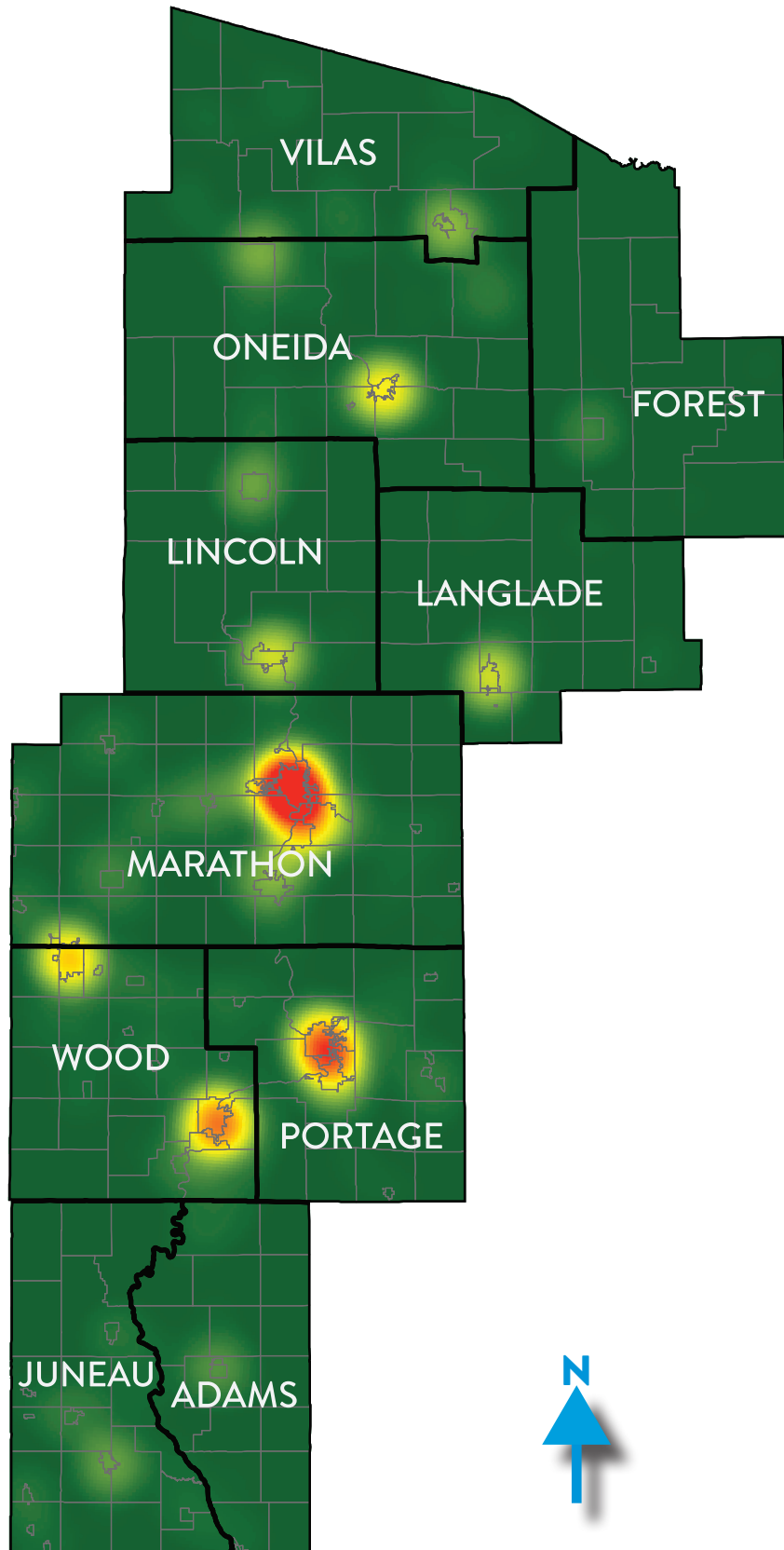
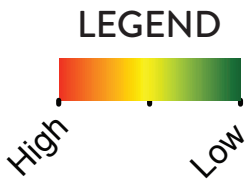
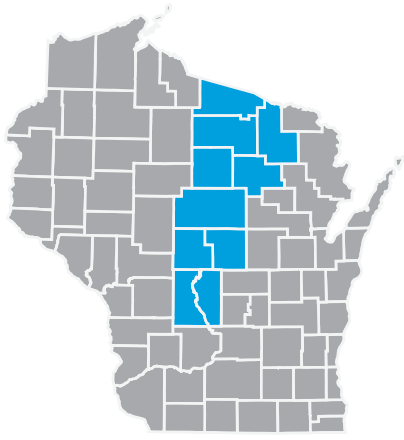
**TABLE 12** | Regional Future Employment Projections

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

SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information



MAP 2 | Employment Density



This map is neither a legally recorded map nor a survey and is not intended to be used as one. This drawing is a compilation of records, information and data used for reference purposes only. NCWRPC is not responsible for any inaccuracies herein contained.

Data Sources: DWD 2000 & 2010



## **J** Employment by Sub Sector (NAICS 3 Digit)

Roughly 65 percent of the sectors project an increase in jobs over the next 10 years. Based on location quotients for 2013, it is evident that the Region is most specialized in natural resources and manufacturing, with general clusters in the following:

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

### **Agriculture, Forestry, Fishing and Hunting Cluster**

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

### **Food, Beverage and Textile Cluster**

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

### **Wood, Paper, Printing and Plastics Cluster**

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

### **Machinery, Equipment and Metal Product Cluster**

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

### **General Merchandise Stores and Non-store Retailers Cluster**

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

### **Transportation and Warehouse Cluster**

The transportation and warehouse cluster is the strongest cluster in the Region with all areas showing job growth over the next 10 years. This cluster currently employs 4.3 percent of the Region's workforce. Between 2013 and 2023, the cluster is expected to gain 1,898 jobs, or 20 percent of its employment. The largest projected increase is in truck transportation with projected increases of 1,580 jobs, a 21 percent increase in employment. The second largest employer in the cluster, transit and ground passenger transportation is projected to add 75 jobs over the same time period.

### **Finance and Insurance Cluster**

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

### **Health Care and Social Assistance Cluster**

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



# FORESTRY

## K Location Quotient Analysis

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

**TABLE 13 | Top Five Location Quotients by County Compared to Nation**

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

SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information

Table 13 displays the top 5 Location Quotients for each county throughout the Region. The results show that counties in the Region are strong in Manufacturing, Retail Trade and Agriculture, Forestry and Fishing. The table also shows that wood products manufacturing, forestry and logging and crop production are employment sub sectors that have a high location quotient. In addition, the Region shows a high LQ in transportation, both rail and truck, and insurance.

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

Table 14 shows all exporting sub-sectors on a regional level. The regional location quotients indicate that the Region is strong in the Manufacturing, Retail Trade, Agriculture, Forestry and Fishing sectors, Transportation, Health Care, and Insurance industries. Wood manufacturing and Forestry and Logging are two of the sub-sectors with the highest location quotient scores. This sub-sector was identified as a critical sector to the regional economy. Discussions with manufacturers in Langlade County lead to the concept of a Wood Technology Center of Excellence. Northcentral Technical College took that concept and collaborated with North Central Wisconsin Regional Planning Commission, Langlade County, the City of Antigo, local K-12 schools and local wood manufacturers to develop a project that was worthy of an EDA grant.

**TABLE 14** | Regional Location Quotients Greater than 1.00

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

SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information

## **L** Statewide Economic Industry Clusters

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

The high standard of living and recreational amenities of the Region offer a competitive edge not found in larger communities. The Wisconsin Economic Development Institute in Madison, WI has identified six existing clusters and two emerging clusters for the State of Wisconsin.

### **Existing Clusters**

#### **Wind Energy**

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

#### **Biotechnology**

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

#### **Dairy**

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

#### **Printing**

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

#### **Food Products and Processing**

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

### Forest Product Industry Cluster

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

### Emerging Clusters

The recent statewide study called Wisconsin's Economy in the Year 2010, completed by UW-Madison, reviews the state's general economy and identifies emerging sectors. Those sectors are identified as:

#### Computer and Data Processing Services, Information Technology

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

#### Medical Devices

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

### Business & Industrial Parks

Business and/or industrial parks are important assets to both the local community and the Region. There are 56 identified business and/or industrial parks within the Region. The parks are essentially an area of land that are "ready-to-build" industrial/business sites. All necessary infrastructure improvements are in place to allow a business to construct and operate with minimal difficulty.

Every county in the Region has at least one, while there are 13 in Marathon County. The majority are located in the central and south sub-regions. In all, these parks include over 7,500 acres of business and industrial land, of which 2,100 acres are open and available with infrastructure. There are an additional 600 acres that still do not have infrastructure in place. Most of the business and industrial parks listed have a full range of utility services (water, sewer, gas, and electric) and several have rail access.

Table 15 provides a summary of the size, services, and acres available in these parks. Map 1 provides the locations of each industrial park within the Region.



PAPER

TABLE 15 | Business & Industrial Parks

County	Park Name	Community	Total Acres	Buildable	Infrastructure	Available	Water	Sewer	Gas	Electric	Rail	Highway Access
ADAMS	City of Adams Industrial Park	Adams	38	33	12	12	Y	Y	Y	Y	Y	HWY 13
	City of Adams South Industrial Park	Adams	40	28	0	28	Y	Y	Y	Y	N	HWY 13
	South Industrial Park	Jackson	90	90	35	75	N	N	Y	Y	N	HWY 13
	North Industrial Park	Preston	35	35	5	5	N	N	Y	Y	N	HWY 13 & 21
	Town of Rome Industrial Park	Rome	240	220	100	140	Y	N	Y	Y	N	HWY 13
	Totals		443	406	152	260						
FOREST	City of Crandon Industrial Park	Crandon	22	22	14	14	Y	Y	Y	N	Y	HWY 8, 32 & 55
	Laona Industrial Park	Laona										
	Totals		22	22	14	14						
JUNEAU	Camp Douglas Industrial Park	Camp Douglas	10	8	5	7	Y	Y	Y	N	Y	HWY 12, 16 & I-90/94
	Elroy Industrial Park	Elroy	15	15	0	0	Y	Y	Y	Y	N	HWY 80 & 82
	Lyndon Station Industrial Park	Lyndon Station	60	55	38	38	N	Y	Y	N	Y	HWY 12, 16 & I-90/94
	Mauston Business Park	Mauston	230	210	123	123	Y	Y	Y	Y	N	HWY 82 & I-90/94
	Mauston Industrial Park	Mauston	390	350	17	136	Y	Y	Y	N	Y	HWY 12, 16 & I-90/94
	Necedah Industrial Park	Necedah	177	177	145	146	Y	Y	Y	N	Y	HWY 80 & I-90/94
	New Lisbon Business Park	New Lisbon	30	24	6	6	Y	Y	Y	Y	N	HWY 12, 16 & I-90/94
	New Lisbon Industrial Park	New Lisbon	109	109	73	73	Y	Y	Y	N	Y	HWY 80 & I-90/94
	Totals		1,021	948	408	529						
LANGLADE	City of Antigo Industrial Park	Antigo	620	620	130	189	Y	Y	Y	N	N	HWY 45, 52 & 64
	Elcho Industrial Park	Elcho	52	48	0	22	Y	Y	Y	Y	N	HWY 45
	White Lake Industrial Park	White Lake	13	13	3	3	Y	Y	Y	Y	N	HWY 64 & CTY M
	Totals		685	681	133	214						
LINCOLN	Merrill Airport Industrial Park	Merrill	90	90	50	50	Y	Y	Y	Y	N	HWY 107
	Town of Merrill Business Park	Merrill	301	301		301	Y	Y	Y	Y	N	HWY 107
	Tomahawk Industrial Park North	Tomahawk	60	60	0	0	Y	Y	Y	Y	N	HWY 51
	Tomahawk Industrial Park South	Tomahawk	20	20	0	0	Y	Y	Y	Y	N	HWY 51
	Totals		471	471	50	351						
MARATHON	City of Abbotsford Business Park	Abbotsford	51	51	15	15	Y	Y	Y	N	N	HWY 29 & 13
	Village of Athens Industrial Park	Athens	110	105	55	90	Y	Y	Y	N	N	HWY 97
	Colby Business Park	Colby	31	31	17	17	Y	Y	Y	Y	N	HWY 13
	Village of Marathon Business Park	Marathon	80	80	65	65	Y	Y	Y	N	N	HWY 29 & 107
	Central Wisconsin Business Park	Mosinee	360	218	28	28	Y	Y	Y	Y	N	HWY 153 & I-39
	Village of Rothschild Business Park	Rothschild	160	160	10	10	Y	Y	Y	Y	N	HWY 51
	City of Schofield Business Park	Schofield	240	240	0	0	Y	Y	Y	Y	N	HWY 29 & 51
	SPACE Business Park	Spencer	80	63	30	63	Y	Y	Y	Y	Y	HWY 13
	Spencer Industrial Park	Spencer	140	140	10	63	Y	Y	Y	Y	Y	HWY 13
	Stratford Business Park	Stratford	118	118	26	26	Y	Y	Y	Y	N	HWY 97 & 153
	Wausau West Industrial Park	Wausau	500	400	345	345	Y	Y	Y	Y	N	HWY 29 & 51
	Weston Business Park South	Weston	78	42	42	42	Y	Y	Y	Y	N	HWY 29
	West Business Technology Park	Weston	258	258	27	27	Y	Y	Y	Y	Y	HWY 29
	Totals		2,206	1,906	670	791						
ONEIDA	Air Industrial Park	Rhineland	45	0	0	0	Y	Y	Y	Y	Y	HWY 8 & 47
	Highway 8 West Industrial Park	Rhineland	41	0	0	0	Y	Y	Y	Y	N	HWY 8
	Rhineland Industrial Park	Rhineland	80	0	0	0	Y	Y	Y	Y	N	HWY 17
	Rhineland Industrial Park (Aviation)	Rhineland	29	29	0	0	Y	Y	Y	Y	N	HWY 8
	Three Lakes Industrial Park	Three Lakes	20	20	0	0	Y	Y	Y	N	N	HWY 32 & 45
	Totals		215	49	0	0						
PORTAGE	Amherst Business Park	Amherst	40	37	37	31	Y	Y	Y	Y	Y	HWY 10
	Pines Corporate Center	Plover	112	112	86	86	Y	Y	Y	N	Y	HWY I-39 & 54
	Portage County Business Park	Plover	422	422	212	212	Y	Y	Y	Y	Y	HWY I-39 & 10
	Twin Towers Industrial Park	Plover	100	100	5	5	Y	Y	Y	Y	Y	HWY I-39
	Stevens Point Industrial Park	Stevens Point	300		0	0	Y	Y	Y	Y	Y	HWY I-39
	Totals		974	671	340	334						
VILAS	Eagle River Industrial Park	Eagle River	80	80	0	0	Y	Y	Y	N	N	HWY 45 & 70
	Tamarack Business Park	Eagle River	40	32	18	18	Y	Y	Y	N	N	HWY 45 & 70
	Lac du Flambeau Industrial Park	Lac du Flambeau	60	60	7	7	Y	Y	N	Y	N	HWY D & 47
	Thorofare Road Industrial Park	Lac du Flambeau	78	78	0	78	Y	N	N	Y	N	HWY 47
	Totals		258	250	25	103						
WOOD	Marshfield Air Business Park	Marshfield	26	26	7	7	Y	Y	Y	Y	N	HWY 10 & 54
	Marshfield East Industrial Park	Marshfield	260	240	0	0	Y	Y	Y	N	N	HWY 10, 13 & 97
	Mill Creek Business Park	Marshfield	160	154	137	137	Y	Y	Y	N	Y	HWY 10 & 13
	Nonwood Industrial Park	Marshfield	60	55	19	19	Y	Y	Y	Y	N	HWY 10
	Yellowstone Industrial Park	Marshfield	84	84	84	84	Y	Y	Y	N	Y	HWY 10
	Nekoosa Industrial Park	Nekoosa	58	43	33	43	Y	Y	Y	Y	N	HWY 173 & 73
	Rapids East Commerce Center	Wisconsin Rapids	213	213	40	112	N	Y	Y	Y	Y	HWY 54
	Wisconsin Rapids West Side Industrial Park	Wisconsin Rapids	538	530	31	31	Y	Y	Y	Y	Y	HWY 13 & 54
	Woodlands Business Park	Wisconsin Rapids	148	148	32	61	Y	Y	Y	Y	N	HWY 13 & 54
	Totals		1,547	1,493	383	494						

SOURCE: Wisconsin Department of Workforce Development, Bureau of Workforce Information



## **N** Summary

The ability for the Region's economy to grow is dependent on the regional workforce. As the population grows so does job growth. However, without the availability of quality jobs, growing the population becomes difficult. These two variables work hand in hand. The North Central Region is experiencing a shift in population that includes a large percentage of the population entering the age of retirement. As workers retire, jobs will become vacant and left unfilled. The Region is experiencing a negative net growth of people 20-29 years of age resulting in a lack of qualified workers. This shift in population will have a direct impact on the Region's ability to satisfy the needs of employers, attract future employers and expand existing businesses.

Knowledge based jobs requiring specific education are instrumental in growing the Region's economy. These opportunities create long term employment at high wages which increase the median household and per capita incomes and support the service industry positions stimulating the local economy. Businesses and education must work together to identify the knowledge, skills and abilities necessary to satisfy the demand of businesses. Creating an environment with highly educated people will attract outside companies and attract other highly educated professionals to the Region helping address our current trend of an aging population.

The attraction of driver industries, industries that bring in money from outside of the Region, will further grow the regional economy and create new opportunities for our Region. Identifying and strengthening these industries will ensure economic growth and better protect the Region from an economic downturn.

The ability to create an exciting regional environment will better attract educated professionals looking to create, innovate and build new business ideas. The creation of a unique place has a great influence on the attraction of innovative and creative professionals. As the population grows, so does the creative environment and the attraction of companies, jobs and other professionals. Without these components, the creation of a livable community becomes difficult. A livable community requires quality jobs, a growing educated workforce, and an environment that stimulates innovation and creativity.



# RETAIL

## 2 GOALS AND OBJECTIVES

As part of the previous Comprehensive Economic Development Strategy planning efforts the following seven goals, along with objectives and performance measurements, were adopted. These goals that provide the starting point for the development of goals, objectives, and policies for the Regional Livability Plan effort.

### **GOAL 1:**

Foster efficient business expansion and retention to increase employment opportunities and employment in the region.

#### **Objectives:**

1. Retain and expand existing business in the Region by meeting with businesses regularly identifying opportunities and challenges.
2. Grow and improve the Region's competitiveness by assessing and leveraging industry clusters.
3. Develop policy that encourages business growth and expansion.
4. Educate businesses on different grant and funding opportunities available
5. Encourage and promote business education on exporting opportunities.
6. Coordinate economic development efforts among all entities to provide a seamless approach to maintain and diversify the regional economy.

### **GOAL 2:**

Create an innovative atmosphere to foster an entrepreneurially supportive environment.

#### **Objectives**

1. Diversify the Region's economy by fostering the development of emerging industry sectors.
2. Identify, create and promote programs, activities, and policies fostering innovation and new business reducing the risk for entrepreneurs.
3. Identify and grow angel and capital venture investments.
4. Promote and reward a culture of entrepreneurial and innovative business development.
5. Promote and encourage the development of new incubators and seed accelerators throughout the Region.
6. Develop the connection between the creative industries and economic development.
7. Identify and study "place making" opportunities to improve public spaces.

### **GOAL 3:**

Promote and attract new business from outside the region.

#### **Objectives**

1. Work with local governments, regional partners and the state to assist with the attraction of new businesses locating to the area.
2. Recruit new businesses and industries placing special emphasis on high wage clusters.
3. Diversify the region's economy fostering the development of emerging and evolving industry clusters.
4. Make use of government incentives to further business development in the region.

**GOAL 4:**

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

**Objectives**

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

**GOAL 5:**

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

**Objectives**

1. Provide training to workers of all ages and economic strata to ensure they are current in existing and emerging skills, knowledge, ability and expectations.
2. Increase the number of 4 year high school completions in the Region.
3. Increase the number of associates and 4 year degrees in the Region.
4. Develop entrepreneurial training and education at area high schools and extensions.
5. Work with businesses, K-12 Schools, Higher Education Schools and Workforce Development to determine and develop skill sets.
6. Enhance business-specific leadership skills in young professionals
7. Develop a “manufacturing field trip” for regional high schools and their parents to tour new manufacturing facilities.
8. Develop a plan to retain and attract a young workforce.
9. Develop a mentor program for older workers to work with new workforce.
10. Develop a training program for retiring workforce to help develop a “second career”.

## **GOAL 6:**

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

### **Objectives**

1. Support and participate in the Northwoods Rail Transit Commission
2. Work with Central Wisconsin Regional Airport and the Onieda Rhinelander Airport to expand cargo and passenger service in the Region.
3. Work with WISDOT to plan for, develop and maintain the capacity of the Region's transportation system.
4. Continue to upgrade and repair existing roadways.
5. Encourage commuter and passenger rail service to the Region
6. Expand utility and transportation links to serve areas where they are needed for job growth.
7. Develop a reliable data infrastructure using both wireless and high speed fiber optic networks, especially in north sub-region.

## **GOAL 7:**

Promote and Increase communication between regional and county economic development, workforce development and planning organizations.

### **Objectives**

1. Create a unified vision of regional growth and development needs for the Region.
2. Hold a regular Regional Economic Development Summit.
3. Collaborate with surrounding regional planning commissions on economic development goals and activities.
4. Increase collaboration and communication at the regional level about land use and transportation planning as it relates to economic development.

## **Regional Performance Measures**

In an effort to identify critical information related to housing and track changes over time the following performance measures were identified.

- » Employment by Sector
- » Unemployment Rates
- » Total Business Establishments
- » Grant applications and Awards
- » Education and Training of Workforce
- » Population by age in the Region
- » Number of Brownfield Redevelopment projects in the Region
- » Acres of Designated Farmland
- » Acres available for Industrial, Commercial and Retail
- » Per Capita Income
- » Median Household Income
- » Regional Location Quotients
- » Number of incubators and seed accelerators in Region
- » Broadband Access/Coverage (upload and download rates)



# TOURISM



NORTH CENTRAL WISCONSIN REGIONAL PLANNING COMMISSION  
**ECONOMIC DEVELOPMENT ASSESSMENT REPORT**  
EDITION 2015

