



GREATER WAUSAU REGION ECONOMIC DEVELOPMENT STRATEGIC PLAN

ABOUT TIP



TIP STRATEGIES, INC. is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm’s core competence in strategic planning for economic development has broadened to include expertise in talent strategies and in organizational development.

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EXECUTIVE SUMMARY

The Wausau region is home to industry-leading companies ranging from Aspirus and Greenheck to Eastbay and Church Mutual Insurance. It has an attractive urban center in downtown Wausau with vibrant streetscapes containing a mix of historic buildings and newer space for businesses and residents. Marathon County, the largest in Wisconsin by land area, also contains numerous distinct rural communities, highly productive agricultural lands, and a diverse menu of outdoor recreation assets unlike any other community in Wisconsin or, arguably, the entire Midwestern US.

Despite these advantages, the Wausau region lags competitor metro areas in Wisconsin and similar small metros in other parts of the US in employment growth, labor force growth, housing development, and amenities that attract young people. Part of the challenge for Marathon County is an economy driven by the traditional industries of manufacturing and agriculture. The Wausau region was affected deeply by the Great Recession since many local manufacturers make supplies and products upstream of the real estate and construction industries, two of the hardest-hit sectors of the US economy.

Marathon County's total employment levels have yet to recover from the recession, with the number of jobs still about one percent lower in 2018 compared to 2007, before the recession started. The area's agriculture and food processing industry has faced major headwinds due to global competition, automation, and labor shortages. In addition, the long-standing insurance sector in the Wausau region has undergone multiple rounds of downsizing, consolidation, and relocations that have shifted investments and labor away from the region. Future economic development efforts in Marathon County must balance the needs of existing industries with a forward-looking approach to spur growth in areas with untapped potential such as tourism and outdoor recreation, as well as entrepreneurship and innovation.

In response to these challenges, the Wausau Region Chamber of Commerce and MCDEVCO engaged TIP Strategies, an Austin-based economic development consulting firm, to create a 10-year road map to guide Marathon County's growth. The first step in the planning process was to establish a common understanding of challenges and assets for economic development. This "discovery" phase included valuable interviews and roundtable discussions with more than 100 community and business leaders in Marathon County. During this phase, the consulting team also analyzed a large set of demographic and economic variables to assess how the Wausau region's economy stacks up against its competition in Wisconsin and outside the state. Findings from these tasks informed our understanding of Wausau's opportunities and helped guide our recommendations. Additional details, including a summary of strengths, weaknesses, opportunities, and threats (traditionally known as a SWOT analysis), are presented in the appendices.

STRATEGIC PLAN SUMMARY

GOALS

1. Talent
2. Innovative Companies
3. Placemaking

TARGET INDUSTRIES

- Manufacturing
- Healthcare
- Agriculture & Food Processing
- Tourism & Outdoor Recreation
- IT & Business Services

MEASURABLE OUTCOMES

- Talent development & attraction
- Increased private sector investment
- Robust employment growth
- Retention & expansion of existing industries

THE PLAN

The resulting strategic plan is centered on three goals: talent, innovative companies, and placemaking. Each goal is supported by initiatives designed to develop and attract talent, generate new private sector investment, encourage robust employment growth, and help existing industries remain and grow in Marathon County.

- **GOAL 1: TALENT** *Attract Skilled Workers and Talented Individuals.*

Over the last decade, labor availability has risen to the forefront of corporate strategy and site location decisions. As a result, economic development organizations have recognized that the ability to attract and retain top-tier talent is a fundamental component of economic success.

- **GOAL 2: INNOVATIVE COMPANIES** *Nurture, Grow, and Attract Technology-Enabled Companies.*

Connecting Marathon County's entrepreneurial companies with the innovation-focused assets in the region and throughout the state will be key to the region's economic vitality. These efforts should leverage the region's strengths in manufacturing and agriculture and capitalize on growth in industries like healthcare to support the needs of existing companies and attract new investment.

- **GOAL 3: PLACEMAKING** *Develop Quality Places and Amenities to Attract the Best and Brightest.*

Creating quality places is an essential ingredient for attracting talent and companies. Wausau has enviable advantages in this regard including a vibrant downtown, a wide range of recreational amenities, and a number of historic buildings. Protecting and enhancing these assets will serve both current and future residents. Maximizing the opportunities associated with the Wisconsin River is an important aspect of this goal.

It should be noted that these goals are interwoven. While the initiatives they outline differ, they are linked by a common vision for a more vibrant and more competitive community.

GREATER WAUSAU PROSPERITY PARTNERSHIP

Given the ambitious agenda set out by the plan, a clear and unequivocal leadership role is required. That leadership role will be assumed by a new organization provisionally called the Greater Wausau Prosperity Partnership (GWPP). The collective support for this recommendation encompasses leading voices in business and industry, higher education, and local government. Creation of the GWPP will help signal the start of a new chapter in Wausau's economic future.

RATIONALE

The Greater Wausau Chamber of Commerce has been a positive force for economic development both in the City of Wausau and in Marathon County. In fact, under strong leadership, the Chamber has established itself as a respected regional entity. The organization's track record of working with companies, public entities, and foundations suggests that economic development is a central focus of the Chamber. It is not. The Chamber has a variety of other functions that command its time and resources.

The role of MCDEVCO, while it touches related functions – a revolving loan fund and entrepreneurial support – is a limited one. Similarly, the cities in the county, as well as Marathon County itself, take actions that impact economic development but, of course, provide a variety of other functions more central to their mission.

Other organizations that play an important role in sustaining the local economy include the Wausau/Central Wisconsin Convention & Visitors Bureau (CVB) and Wausau Events. The CVB promotes tourism in the greater Wausau area and helps secure new sports events and tournaments through its Sports Authority function. Wausau Events produces high-quality events and festivals. Both organizations support activities that provide amenities for current residents while bringing thousands of visitors and millions of dollars to the region.

Despite these strong and effective groups, the simple reality is that there is no organization in Wausau or Marathon County committed *primarily* to economic development. As a central component of this strategic plan for the Chamber and MCDEVCO, we recommend the formation of a new organization to meet this need: the Greater Wausau Prosperity Partnership (GWPP).

STRUCTURE & ROLES

The GWPP will serve as an umbrella organization encompassing the economic development-related functions of the Chamber and MCDEVCO. The Chamber will be integral in helping to establish the GWPP, which is envisioned as a coordinating body with representation from relevant organizations, business and industry, higher education, and community leaders (see Figure 1, next page). However, the structure of the organization will be flexible and is likely to evolve over time.

As envisioned, the GWPP will fulfill four important roles:

-  *Assess and Prioritize Economic Development Plan Initiatives*
-  *Establish Expectations and Accountability of Actionable Tactics*
-  *Financial Resource Development for Execution*
-  *Assess Effectiveness of Tactics*

In summary, the GWPP is charged with guiding the execution of this strategic plan. This charge will include helping to prioritize the implementation of strategies and tactics, deciding on resource allocation, identifying partnership opportunities, and gauging the plan's success. The work of the GWPP will be organized along three functional areas corresponding to the strategies in the economic development plan: Attracting and retaining talent. Building a cluster of innovative companies. Leading placemaking initiatives.

For the plan to be implemented assembling financial resources will be imperative. As a result, an essential role for the GWPP will be serving as a catalyst to launch a capital campaign for economic development purposes. Funding for the Chamber will be a component of this launch, along with the Chamber's traditional dues structure. The Chamber will be assembling an economic development platform to support the GWPP's implementation of this plan. The Chamber will further serve as the primary owner of the region's business, retention, and expansion (BRE) effort, including sites, talent development, and educational partnerships.

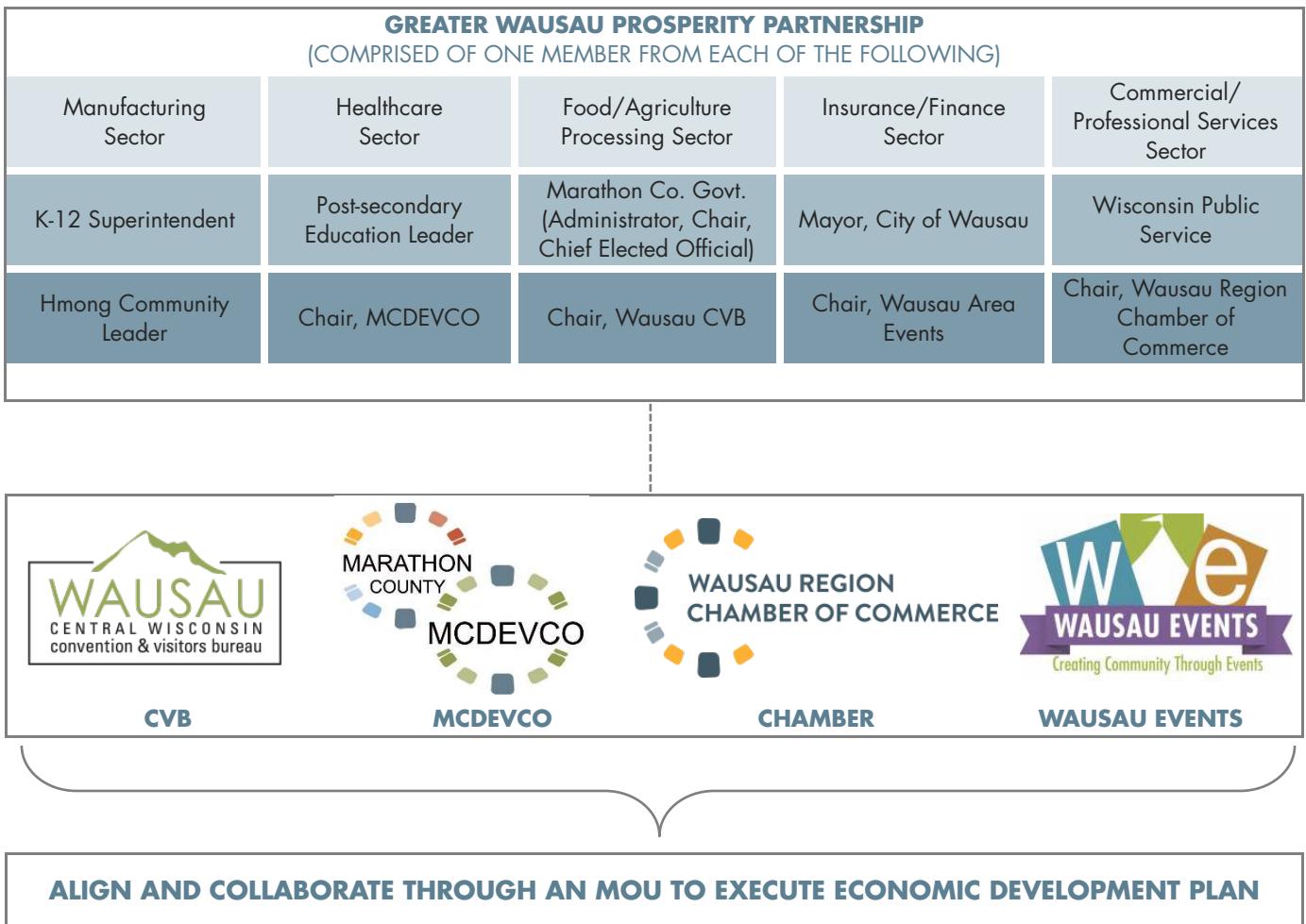
While additional partners are likely to be added in the future, two other organizations should join the Chamber and MCDEVCO as part of the initial memorandum of understanding to drive the implementation of the strategic plan:

the CVB and Wausau Events. These four organizations would collaborate to execute the recommendations as they align and connect with their organization’s distinct mission.

WAUSAU’S FUTURE

Just as important as this document and the detailed recommendations it contains is the rising tide of energy and positive momentum that has emerged as a result of the strategic planning process. The Wausau region’s community and business leaders have rolled up their sleeves, committed their time and resources, and have taken the critical first steps toward charting a new path for the region’s economic future. Wausau’s path forward is now clear: a determined focus on economic vitality and prosperity.

FIGURE 1. PROPOSED ORGANIZATION STRUCTURE



STRATEGIC ACTION PLAN

GOAL 1. TALENT

Attract Skilled Workers and Talented Individuals.

Successful economies all have one thing in common: they attract outsiders. Thriving communities grow by attracting talented workers from outside the area, by recruiting new companies into the community, and by attracting visitors from near and far. The business world understands this well. A company that fails to attract new customers will fail. A business must sell its products and services to an expanding customer base in order to thrive and grow. The same is true for communities and the Wausau region is no exception. Wausau's regional economy has stagnated in recent years, while other metro areas in Wisconsin and the rest of the country have continued moving forward. The Wausau region must embrace change in order to re-emerge as a growing economy. To attract talent from outside the region and state, the most important change is a shift towards an outward-looking perspective.

This is not to say Wausau should ignore its existing companies, residents, or workforce. Supporting existing industries (see Goal 2. Innovative Companies), and developing a local workforce are critical for economic development. In fact, existing employers should be closely involved in workforce initiatives. Developing the region's existing workers and continually attracting talented individuals from outside the region are both important. But the orientation of all talent initiatives must start with the recognition that skilled workers have a choice of where to live and work. The Wausau region will prosper only if it can compete successfully for top-tier talent, including locally developed talent and skilled workers from outside the region.

INITIATIVE 1.1. THE WAUSAU BRAND

Re-brand the Wausau region as an outdoor recreation mecca.

A brand defines what you stand for, a promise you make, and the personality you convey. The most recognizable brands are often those of respected companies and products. Think about Apple and how it combines design with technology through its products. Or the brand promise of Whole Foods Market and the healthy lifestyle choice it represents. But what about places? Communities have brands too, and like companies, the brand of a place matters to the current and potential "customers" of the community: companies, entrepreneurs, skilled workers, visitors, and investors. A well-defined and executed brand strategy for your community is directly connected to how well the Wausau region competes for prospects, potential workers, and visitors.

What are examples of successful community brands, or re-brands? "Rethink Cleveland" gives meaning to a place with an industrial past and the promise of technology growth. "Live Music Capital of the World" provides Austin with a message that galvanizes local artists, attracts visitors, and embraces the creative energy of the rapidly growing technological and entrepreneurial hub. "Climate City" capitalizes on Asheville's climate science expertise and appeals to its socially responsible ethos. Many of the best examples of community brands are those that have arisen organically rather than from a top-down, formalized branding approach. In addition, these organic brands are often first adopted and elevated by the local business community.

Successful community brands don't emerge out of thin air; they must begin by leveraging local assets. You can stretch the truth—Austin is actually third in the US for live music workers per capita, just behind Los Angeles and way behind Nashville—but there has to be enough truth to resonate. For a community brand to be "sticky" it must

tell the community's unique story in a way that is appealing to internal stakeholders (making it easy for them to get on board) yet also tailor-made for marketing to outsiders, inviting inquiry and interest from external audiences.

What is the Wausau region's brand? The Wisconsin Central Time brand represents an attempt to create a brand for economic development. It may have resonated with internal stakeholders, but it falls flat in marketing to attract outsiders. The Wausau region needs a new brand. One that captures the unique strengths of the region, inspires community members, and generates excitement from people outside the region. Our recommendation is to develop a brand strategy that positions the Wausau region as the "Xtreme Sports Capital" to capitalize on the area's multitude of outdoor recreation and extreme sports assets. The new brand already has grass-roots momentum and will be developed to achieve specific goals around talent attraction and economic development.

STRATEGIES AND ACTIONS

- 1.1.1.** Launch an Outdoor Recreation Task Force that brings together innovators in the region's outdoor recreation industry to discuss opportunities for new events, destinations, and other business opportunities that leverage the region's large menu of outdoor amenities.
- 1.1.2.** Support Granite Peak Ski Area in its expansion projects.
 - Encourage the growth of the resort and expansion of its facilities.
 - Partner with the Ski Area to explore development of surrounding properties with supportive uses (lodging, housing, retail/restaurants) that draw a higher volume of visitors into the region and encourage them to stay longer.
 - Explore opportunities to develop a full-service resort hotel in conjunction with Granite Peak.
- 1.1.3.** Invest in the enhancement and development of extreme sports, outdoor recreation, and related attractions throughout Marathon County. This includes curling, whitewater rafting, hiking and biking trails, and other amenities that attract outdoor sports enthusiasts.
- 1.1.4.** Build awareness of the Wausau region as a destination for the business side of extreme sports and outdoor recreation.
 - Conduct a "fam tour" for investors, innovators, extreme sports athletes, bloggers, and media personalities involved in extreme sports to enhance awareness of the Wausau region as a location for extreme sports business opportunities.
 - Invite entrepreneurs and innovators in the recreational technology—or "rec tech"—segment of the sports equipment industry to participate in the fam tour and in local outdoor recreation events.
- 1.1.5.** Take ownership of the Wausau region's online and social media presence and play an influential role in traditional media channels.
 - Actively manage and update the City of Wausau and Marathon County websites and other online content, such as Wikipedia, to ensure they include accurate and positive information. These sites are often the first (and sometimes only) source of information people use to learn about a community before a potential visit.
 - Maintain close relationships with local and regional media to provide a steady stream of positive content related to talent and economic development initiatives in the region.

INITIATIVE 1.2. TARGETED TALENT RECRUITMENT

Launch a new talent attraction initiative to support employers in their talent recruitment efforts.

The share of remote workers—those who do not commute to a regular work location—has grown from slightly more than three percent of the US workforce to more than five percent between 2000 and 2016. Austin leads the nation among the 100 largest metro areas, with remote workers representing nearly nine percent of the metro area’s workforce. Several small metro areas with significant outdoor recreation assets, such as Boulder, CO; Bend, OR; and Asheville, NC, also have a high share of remote workers (more than eight percent).

While the percentage of Marathon County residents who work remotely is on par with the US at five percent, only three percent of residents in the city of Wausau fall into this category, indicating a significant untapped opportunity for talent recruitment. Along with the talent attraction effort, investments must also be made to provide a more conducive local environment for remote workers, freelancers, technology workers, and professionals with flexible employment situations. This should include the creation of coworking spaces in downtown Wausau (see Goal 3. Placemaking).

Remote workers are an increasingly important segment of the overall US workforce and an appealing target for places like Wausau that are rich in assets but short on workers. Yet remote workers only represent one solution to the talent problem. The region’s major industries—manufacturing, healthcare, and agriculture—depend on a steady influx of workers across the skill spectrum that, for the foreseeable future, cannot be supplied by remote talent. This includes everything from the entry-level labor required by many small to mid-size manufacturers to the highly skilled engineers and specialty physicians needed to support the region’s advanced manufacturers and healthcare organizations.

STRATEGIES AND ACTIONS

- 1.2.1.** Develop a comprehensive new talent attraction website to market the Wausau region as a desirable destination not only for traditional manufacturing employment, but also for creative workers, entrepreneurs, and professionals.
 - Use the new website as the central information hub for a broader talent attraction campaign.
 - Develop an omni-channel talent recruitment campaign aimed at filling the hiring needs of Marathon County’s major employers.
 - Design the campaign with a comprehensive suite of services including media planning, public relations, social media strategy, content creation, creative development, digital management and production, branding, and a job-posting microsite.
- 1.2.2.** Embrace the local Hmong population and explore linkages to St. Paul, MN (an important population center for the Hmong nationally).
 - Work with the Hmong Wisconsin Chamber of Commerce to promote the Wausau region as a leading destination for Hmong business owners and professionals.
 - Market Wisconsin and Marathon County as a Hmong-friendly location to Hmong talent located in other parts of the US and globally.

1.2.3. Promote the Wausau region as a hub for extreme sports and outdoor recreation enthusiasts.

- The year-round recreational options of the region represent a unique value proposition. The Outdoor Recreation roundtable held in December 2018 revealed specific opportunities that advance this goal. The roundtable identified three specific opportunities that warrant further examination:
 - Events (IronBull and Xtreme sports generally), mountain bike racing and cross-country riding, downhill ski competitions, whitewater kayaking, cross-country skiing expansion
 - Conferences associated with the events that advance outdoor recreation
 - Recruitment of niche industries associated with sports and recreation technology

1.2.4. Target remote workers as a segment of the workforce for relocation to the Wausau region, in conjunction with promotional efforts to market the area as a premier location for outdoor recreation enthusiasts.

Best Practices: State of Vermont \$10,000 for remote workers; Tulsa, OK \$10,000 for remote workers

1.2.5. Work with major employers to attract workers from surrounding metros and states.

- Encourage and extend Greenheck’s recruitment of recent college graduates from universities in the Upper Midwest, specifically targeting students that grew up in rural and small-town areas of Wisconsin, Michigan, and Minnesota.
- Develop relationships in nearby larger regions—the Fox Cities (Green Bay, Appleton, Oshkosh), Milwaukee, Madison—for middle-skill workers that could be enticed to move to Wausau for employment opportunities.

INITIATIVE 1.3. EMPLOYER ENGAGEMENT

Align employers and educational partners to address talent issues holistically.

Northcentral Technical College (NTC) is one of the strongest assets for economic development in the Wausau region. NTC is a major employer and economic driver for the regional economy, while also serving as an important asset for area residents. But most importantly, NTC is a key part of the solution to the Wausau region’s most urgent challenge over the next decade: developing a pipeline of skilled workers to support the needs of current and future employers in Marathon County. NTC works in partnership with area employers and other workforce and educational providers through the college’s Business & Industry Solutions program. This program is critical in addressing the immediate and near-term needs of employers. These joint academic/employer training initiatives must continue in order for the region’s industries to remain competitive.

Workforce development and education programs are necessary to build a pipeline of future workers while also enhancing the skills of existing workers. But what about the worker who has the right skills, but no car to travel to and from a job? The single parent who is capable of working, but has no affordable options for child care? Or the worker who has invested in developing skills by paying for college courses with student loan debt and requires a baseline wage rate that local employers cannot (or will not) pay? These are some of the most pressing challenges faced by the Wausau region’s workforce and, by extension, the area’s employers. Solving these problems will require a more holistic approach by employers to address the foundational factors affecting workforce engagement.

STRATEGIES AND ACTIONS

1.3.1. Launch new broad-based employer engagement efforts aimed at cultivating a strong segment of middle skills workers in Marathon County across a range of sectors to include manufacturing, healthcare, and professional services.

- Create an inventory of initiatives in the Wausau region that are bringing together employers and educational/workforce providers to address workforce challenges and identify opportunities to enhance and accelerate these efforts.

Best Practice: Upskill Houston

- Work with NTC and the Central Wisconsin Metal Manufacturers Alliance to develop a pipeline of manufacturing talent through apprenticeship programs and other skills-development training initiatives.

Best Practice: KY FAME (Federation of Advanced Manufacturing Education)

1.3.2. Encourage local employers to provide non-traditional benefits (beyond wages, healthcare, and retirement packages) for talent retention.

- Work through the Workforce Hub network to encourage large and mid-size employers in Marathon County to pool their resources to address workforce retention issues including child care, student loan forgiveness, housing, and transportation.
- Explore options for specific incentives to address current workforce issues. These may include student loan forgiveness, housing subsidies, and employee stock ownership plan (ESOP) benefits.

INITIATIVE 1.4. HIGHER EDUCATION EXPANSION

Grow the higher education base in the Wausau region.

The Wausau region does not have a research university or a comprehensive four-year university. This is a significant obstacle to the region's economic development. NTC is an outstanding academic institution and has done more than its part to fill this void in the region's higher education environment. Nonetheless, without a four-year university in Marathon County, the region will always be limited in its growth potential. This is especially true for the expansion of professional services, technology firms, and other sectors that depend on highly educated workers. Not having a university that brings in thousands of young adults on a recurring basis puts the Wausau region at a disadvantage compared to peer metro areas in Wisconsin and across the US. Local manufacturers are forced to leave the region to find engineers and other recent graduates. Local insurance companies, banks, and law firms have to seek out-of-market young professionals to fill their junior ranks. Furthermore, when young professionals and recent college graduates move into Marathon County from outside the area, they have a difficult time finding their footing because there is no "college town" vibe in the community. In other words, Wausau lacks the concentration of young adults and the amenities typically associated with college towns, such as restaurants and entertainment venues, that create a vibrant nightlife.

Given the time horizon of this plan, we are not recommending the creation of a four-year university. Nevertheless, the concept of a "center of excellence" can help fill the gap. A center of excellence can provide a unique model for programs that attract outside talent and provide support for the growth of key industry segments. Working with NTC and the region's major employers will ensure that an investment in centers of excellence meets local needs and provides as much impact as possible.

STRATEGIES AND ACTIONS

1.4.1. Partner with NTC to pursue growth initiatives to expand existing higher education institutions and invest in new facilities and programs in Wausau.

1.4.2. Launch one or more “centers of excellence” focused on areas of specialized training & research. The Chamber’s current proposal outlines a path forward that can be highly effective.

Best Practices: Universities at Shady Grove in Montgomery County, MD; UT Center for Identity in Austin, TX;

1.4.3. Invite distinct programs from other universities in Wisconsin and outside the state to offer programs in Wausau at the UWSP at Wausau campus.

1.4.4. Leverage specific programs from the UW system (Stevens Point, Madison, etc.) and other schools to support local industries.

GOAL 2. INNOVATIVE COMPANIES

Nurture, Grow, and Attract Technology-Enabled Companies.

Entrepreneurship, innovation, and the adoption of new technologies are all critical ingredients for the growth of local and regional economies. Some of the nation’s fastest-growing metro areas—Austin, Seattle, and Raleigh-Durham—embraced entrepreneurship and technology as a central piece of their economic development efforts long before these tactics gained national attention. Similar commitments in smaller metro areas, such as Asheville and Chattanooga, are creating new opportunities for economic growth in those markets. Within Wisconsin, the Madison region has placed a high value on innovation for decades and has benefited from the growth of entrepreneurial companies. More recently, the Greater Green Bay region has invested in new entrepreneurial ventures with the Packers + Microsoft venture fund and Titledown District innovation hub, as well as the downtown Green Bay T2 Accelerator.

There is an important distinction between entrepreneurial companies and small businesses generally. Entrepreneurial companies are defined by four distinct characteristics: 1) an export-oriented market focus, 2) high levels of capital investment, 3) dependence on intellectual property (IP), and 4) high growth potential. Small businesses, on the other hand, primarily serve local markets, have much lower needs for capital investment and IP, and have modest growth expectations.

INITIATIVE 2.1. TECH GROWTH & ENTREPRENEURSHIP

Encourage supply chain innovation, upstream technology development, and the formation of new businesses driven by the region’s existing industries.

The Wausau region has a history of innovation and entrepreneurship. Many of the largest employers in Marathon County—Greenheck, County Materials Corporation, Crystal Finishing Systems, Linetec, Wausau Window and Wall Systems, and others—started locally and grew to become large companies with hundreds of millions of dollars in annual revenue. There is no doubt that Marathon County is well-positioned to support the growth of entrepreneurial companies. Stronger connections to the robust innovation environment of Madison, driven by UW-Madison and its billion-dollar R&D budget, is an important factor that can help Wausau region entrepreneurs build the necessary networks of talent, capital, and support services to succeed in the global marketplace.

STRATEGIES AND ACTIONS

2.1.1. Work with major employers to encourage supply chain innovation within the Wausau region’s existing industries.

- The Greenheck Innovation Center is an excellent example of local initiative. Linking the specific needs of local companies to cutting-edge technology is an important (and productive) economic development strategy. This can be accomplished both inside and outside the walls of the Innovation Center. Making explicit connections not only to NTC, but also to the University of Wisconsin-Madison, should be a standing option.
- In addition, the “reverse pitch” approach can tie entrepreneurial activity to local companies. It is, however, vital to consider not just local entrepreneurs and innovators, but to extend the competition to the state and national level (see Strategy 2.1.4).

2.1.2. Encourage investment in upstream technology development focused on the region’s large employers and business sectors, including direct investment by major employers as well as the formation of new businesses driven by the region’s existing industries.

- Pursue innovations in healthcare information management focused on rural medicine in partnership with Aspirus.
- Leverage the NTC Agriculture Center of Excellence and area agriculture industry to develop new technologies to support dairy producers and other agricultural businesses.
- Work closely with Greenheck and other advanced manufacturers to invest in science, R&D, and technology development that enhances productivity and innovation in the region’s manufacturing sector.

2.1.3. Cultivate stronger linkages between entrepreneurs and tech workers in the Wausau region and the startup and tech scenes in Madison, Green Bay, Appleton, and surrounding urban areas.

- Increase networking among local entrepreneurs, senior business executives, human resource managers, and tech workers to build a collaborative business culture among the Wausau region’s professional community.
- Invite entrepreneurs and business leaders from Madison, Green Bay, Appleton, Stevens Point, Eau Claire, and other communities across Wisconsin to participate in networking events on a regular basis.
- Market high-growth companies based in Marathon County to outside investors (in Green Bay, Appleton, Madison, Milwaukee, Chicago, and Minneapolis-Saint Paul) to generate awareness of the Wausau region’s entrepreneurial environment.

Best Practices: Venture Asheville entrepreneurial support program as part of Asheville-Buncombe County Economic Development Coalition; Emerging Prairie entrepreneurial support program in Fargo, ND

2.1.4. Encourage local governments and other public sector institutions to make investments creatively.

- Create a Futures Forum for the local governments and public sector institutions in Marathon County, modeled after the City of Fort Collins, CO Futures Committee.

Best Practice: City of Fort Collins, CO Futures Committee

- Use the Futures Forum to provide information to guide public sector purchasing options. Identify major capital expenditures anticipated by local governments and invite local and outside tech firms and other companies to offer non-traditional solutions.

INITIATIVE 2.2. TARGET INDUSTRY RECRUITMENT & EXPANSION

Pursue small to mid-size recruitment targets to support existing industries and employers.

Business recruitment must be a priority for any successful economic development program. The State of Wisconsin has facilitated numerous high-profile recruitment projects in recent years—Foxconn being the largest and most prominent—that have brought new jobs and investment into communities across the state. New business attraction efforts focused on small and mid-size companies within a set of target sectors will help the Wausau region compete for expansions and relocation projects that support the growth of existing industries and provide new economic activity for the regional economy. However, recruitment initiatives should not undercut existing employers in Marathon County. The region benefits from a strong base of existing employers in manufacturing, healthcare, agriculture, insurance, and other sectors. Taken together, the region’s existing employers provide tens of thousands of jobs and form the foundation of the regional economy. A strong business retention and expansion (BRE) program is critical, not only to ensure the stability and growth of existing employers, but also because it is difficult to attract new companies if existing employers are not thriving.

STRATEGIES AND ACTIONS

2.2.1. Promote the Wausau region as a good location for small- to mid-size domestic and international business recruitment targets within a set of target industries (described in more detail in Appendix 3) to support the growth of existing industries. Invest in marketing efforts focused on five target industries:

- **MANUFACTURING:** Paper products and machinery, construction products and materials, and industrial machinery.
- **HEALTHCARE:** Medical specialties, health information management, and long-term care facilities.
- **AGRICULTURE & FOOD PROCESSING:** Dairy production & processing, ginseng production, and value-added processing.
- **TOURISM & OUTDOOR RECREATION:** Extreme/adventure sports, skiing & winter sports, water-based sports, outdoor recreation (hiking, biking), festivals & events.
- **IT & BUSINESS SERVICES:** Software and information technology (IT) services, finance & insurance, e-commerce, and professional services firms.

2.2.2. Host small-scale, targeted events and conferences to bring in decision makers, experts, innovators, and investors within narrowly defined industries.

Best Practices: CCx (Climate City Expo) in Asheville, NC; Animal Health Investment Forum in Kansas City, MO.

2.2.3. Partner with area municipalities and the real estate community to encourage business and industrial park development.

- Protect existing and future industrial sites and business parks from encroachment due to incompatible development and land uses.

- Work with the City of Wausau to encourage investment in the West Business and Industry Park.

2.2.4. Launch a formal BRE program to cultivate stronger relationships with the Wausau region’s major employers and better address their needs.

- Establish and maintain a database of major employers with key information such as number of employees (locally and companywide), hiring plans/needs, global facilities footprint (including expansion/relocation plans), and other relevant information.
- Create a business visitation program focused on Marathon County’s largest employers and on mid-size companies with strategic characteristics including those that serve external markets, have significant growth potential, or fall into one of the region’s target sectors.
- Cultivate relationships with company leadership located outside the region for the largest employers not headquartered locally (such as Eastbay’s corporate HQ in New York and Liberty Mutual in Boston).
- Build an understanding of companies targeted as part of the BRE program through multiple sources (in addition to direct contact with leadership at each target company). Develop relationships with relevant professional service providers (such as accounting firms, marketing/PR firms, and commercial real estate brokers) to provide a more detailed understanding of the company’s needs and challenges.

GOAL 3. PLACEMAKING

Develop Quality Places and Amenities to Attract the Best and Brightest.

Winston Churchill once said, “We shape our buildings; thereafter, they shape us.” This is true not only of buildings, but of parks, plazas, streets, and every part of the built environment in our towns and cities. People are drawn to quality places. This has always been true, but it matters now more than ever for two reasons. First, more people are working remotely—their job is not tied to a single location—than at any time in history, meaning that a growing share of the workforce can choose where to live irrespective of where their job is located. Second, the traditional model of economic development has been turned on its head in recent years. Rather than attracting companies and expecting workers to follow, successful communities develop a quality environment that attracts the best and brightest, which causes companies to take notice and expand into locations where they can access top talent.

What are the ingredients of quality places? Attractive places are multi-faceted and provide a variety of land uses, amenities, and activities within a tightly knit environment. The traditional Main Street of small towns has been re-discovered in recent decades as an efficient way to pack in all the necessary ingredients of a thriving mixed-use district: independent shops and restaurants, office space, housing, entertainment, and nightlife, all woven together with attractive sidewalks, streetscapes, and public spaces. Taking its cues from the resurgence of Main Streets and revived downtowns, the real estate development industry has adopted mixed-use development as the preferred growth model not only in downtowns, but across the transect from urban to suburban to rural environments.

How are quality places developed? The proven formula typically combines thoughtful public investments in new and enhanced infrastructure and public spaces with private sector-driven real estate development. We have also learned from Jane Jacobs that historically significant buildings are vital to the fabric of the community. Repurposing of older buildings has resulted in dynamic new spaces for co-working, brew pubs, and a host of other uses.

The mechanics of placemaking need to be flexible and imaginative. Public-private partnerships (P3s), where both government and business share development costs, risks, and financial benefits are an important tool. Wausau’s mixed success with P3s should not speak against their future use. In addition to P3s, targeted bond initiatives,

similar to those pursued by Oklahoma City, should also be under consideration. Finally, a comprehensive inventory of publicly owned lands (city and county) will help identify potential development and redevelopment opportunities, especially along the river.

INITIATIVE 3.1. URBAN VITALITY & RIVERFRONT DEVELOPMENT

Accelerate the pace of urban revitalization and mixed-use development along the Wisconsin River and throughout downtown Wausau.

Communities around the US are re-discovering their waterfronts for their potential to serve as central attractions for urban revitalization efforts. New York City has converted many miles of previously industrial waterfront properties along the Hudson River, the East River, and even the infamous Gowanus Canal in Brooklyn (once recognized as one of the country's most polluted waterways), into attractive urban parks, trails, and community gathering places. The emergence of downtown Austin as a vibrant mixed-use district with thousands of new residential units, dozens of new restaurants and bars, and millions of square feet of new office space for technology firms started with investments along the Colorado River to create an urban waterfront with hike and bike trails and parks. In addition, rapidly growing cities like Greenville, SC, and Reno, NV, have invested heavily in their riverfronts and credit them with creating a more vibrant urban scene than would have been possible otherwise.

Smaller cities are also reaping the rewards of waterfront amenities in their urban cores: Bend, Oregon's embrace of the Deschutes River has included parks, whitewater kayaking, and entertainment venues. The community's renaissance owes much to incorporating the river into a major retail development (the Mill District). Pueblo, Colorado has created a San Antonio-style Riverwalk with sidewalk cafés, gondolas, and craft breweries by diverting a section of the Arkansas River, which runs adjacent to the community's downtown. There are similar opportunities to expand recreational amenities along the Wisconsin River and other waterways in Marathon County. These can include further hiking/bike trails, kayak/canoe launches, tubing, fishing, and other activities. Beyond purely recreational uses, properties adjacent to the river should also be evaluated for commercial development that takes advantage of waterfront views and scenery, while contributing new commercial activity to the local economy.

STRATEGIES AND ACTIONS

- 3.1.1.** Work with area real estate developers to create vibrant coworking spaces in downtown Wausau for entrepreneurs, freelancers, and remote workers.

The old Wisconsin Public Service (WPS) building located on the Wisconsin River in downtown Wausau (Clark Island) should be re-positioned as a creative co-working space for entrepreneurs, small professional services companies, freelancers, and remote workers. This action is time-sensitive.

WPS, who owns the Clark Island building, has extended the expected disposition of the building six months. This window is critical if the building is not to be demolished. While we understand the existing restrictions upon WPS through various regulators, we feel there is a viable business model that will put the building into productive use. The building can be seen as an important—and symbolic—component of broader riverfront development (see Strategy 3.1.2).

- Develop a pro forma for the WPS building that considers co-working options, space for outdoor recreation companies, amenities such as a brewpub, offices for use by major employers and their contractors and temporary workers, and event space.

3.1.2. Create a riverfront development plan that extends from Winston Street south to Thomas Street.

This is an ambitious recommendation that steps outside of the framework of this plan. But as described in the intro to this goal, it has important economic development implications for the city of Wausau and for the region. This action clearly requires longer term thinking best achieved through the formation of a joint GWPP-city-county task force.

- Work with the City of Wausau and the area real estate community to encourage additional riverfront development in and near downtown.
- Incentivize the relocation of existing industrial businesses located adjacent to the Wisconsin River in downtown Wausau (on both the East and West banks of the river) to move these industrial operations to the City of Wausau West Business and Industrial Park, freeing up valuable riverfront property for urban redevelopment projects.

Best Practices: Bend, OR: Deschutes River waterfront parks and commercial development; Grand Rapids, MI: re-integration of rapids along Grand River in downtown; Pueblo, CO: diversion of Arkansas River to create a riverwalk district with sidewalk cafes, breweries, and trails

INITIATIVE 3.2. WAUSAU CENTER REDEVELOPMENT & URBAN VITALITY

Pursue long-term redevelopment options for the Wausau Center mall to create an urban mixed-use destination that re-energizes downtown Wausau and enhances the regional economy.

Like numerous malls across the US, Wausau Center is a failed mall. The mall does not have any traditional anchor department stores remaining, the majority of the space sits vacant, and the small number of stores still operating are in a challenging situation. The planned HOM Furniture store will bring a limited amount of new activity but is not a long-term solution. None of this speaks ill of Wausau as a community or of the mall's future rebirth into a new destination. Hundreds of malls around the country have undergone a similar transition. Wausau Center is no different, except for one noteworthy distinction: its urban location. Whereas most malls were built in suburban locations adjacent to highway interchanges, Wausau Center is located in the heart of downtown Wausau, Central Wisconsin's urban nucleus.

The land where Wausau Center now sits was something else before—dozens of historic buildings occupied the space when the mall was built in the early 1980s—and it will be something else again. The question is not whether the mall will transition to a different use than its current big-box destination retail model. The question is, "What will the mall become over the next 5 to 10 years?" And will the next phase in the district's life provide a higher economic impact to the Wausau region?

Fortunately, Wausau can learn from models that have worked for mall redevelopment in other communities. The old Highland Mall in Austin is now a flagship campus for Austin Community College, surrounded by more than 1,000 urban apartments, along with new retail and restaurant space and commercial offices for technology companies. The old Villa Italia Mall in Lakewood, Colorado, (an inner-ring suburb of Denver) was completely demolished to make way for Belmar, a dense, mixed-use development with a Whole Foods Market, retail and restaurant space, and hundreds of new apartment units.

STRATEGIES AND ACTIONS

3.2.1. Commission a master plan that explores a range of viable long-term options for redeveloping the Wausau Center mall.

- Incorporate a range of public sector investment strategies, foundation interests, and private sector interest into the planning for redevelopment.
- Work with the City of Wausau to enhance the urban vitality adjacent to the mall, leveraging the recent work of the Toole Design Group project that evaluated multi-modal transportation linkages to/from the district.

Best Practices: Downtown Augusta (GA) Revitalization

3.2.2. Encourage new market-rate housing development in downtown Wausau and adjacent urban neighborhoods.

- Create incentive programs to encourage urban residential development in and around downtown.
- Provide incentives for the redevelopment of surface parking lots, under-utilized industrial and commercial properties, and other non-urban properties into urban housing with a mix of commercial office space and retail/restaurant space.

3.2.3. Experiment with “tactical urbanism” methods for activating empty spaces and underutilized properties in downtown and surrounding parts of downtown Wausau and surrounding portions of the region’s urban core.

- Work with the Wausau River District and local bars/restaurants to create events, festivals, and temporary “activations” of spaces throughout downtown Wausau that draw new visitors and economic activity into the urban core.

THE “TACTICAL URBANISM” MOVEMENT:

The emerging “tactical urbanism” movement favors quick and cheap actions that create nearly instantaneous positive results. This new approach—led by groups such as the Project for Public Spaces and the Better Block Project—is helping to re-energize hundreds of downtowns and urban corridors in small and large cities across the US.

INITIATIVE 3.3. BROADBAND AND HIGH-SPEED CONNECTIVITY

Extend the reach of fiber to rural areas of Marathon County and ensure that 5G connectivity is available in Wausau and other communities in the region.

In terms of land mass, Marathon County is the largest in Wisconsin. There are six cities in the county, 14 villages, 40 towns, and many more unincorporated places. Wausau, the county seat, has a population of about 40,000, leaving a balance of over 95,000 people, many of whom do not enjoy the telecom and broadband benefits of the City of Wausau. The question of connectivity arose both in our workshops and in one-on-one interviews.

From an economic development perspective, broadband access is demonstrably as important as roads and highways and sewer and water. No business can be expected to operate without connectivity. Whether for business expansion purposes, attraction and recruitment, or entrepreneurship, Marathon County can be competitive only if it extends broadband capability to as many communities as quickly as feasible.

Further, there are major changes on the horizon for telecommunications. While *the relationship between wireless 5G and traditional cable is complicated, it needs to be addressed both for the City of Wausau and for less populated areas. Understanding the implications of 5G in the rural parts of the county should be considered a top priority.*

STRATEGIES AND ACTIONS

3.3.1. As a long-term initiative, work with the County, broadband providers and Wisconsin Power to better serve smaller communities and rural areas.

- Empower a working group within the GWPP to survey existing broadband capacity, map options for increasing “last mile” connectivity, and prepare a report detailing options for extending fiber from existing cable.
- Work with the State of Wisconsin to better understand initiatives currently being proposed by the federal government for off-setting costs related to rural broadband.

3.3.2. Engage the City of Wausau in continuing discussion regarding 5G connectivity throughout the downtown and the city as a whole.

- Determine appropriate site for 5G infrastructure (taking into account the LTE frequency range).
- Work with existing telecommunications networks to establish 5G trial areas.
- Engage businesses in providing test platforms.

The relationship between wireless 5G and traditional cable is complicated. Understanding this relationship and how it will impact connectivity in rural and smaller urban areas is far from certain.

APPENDIX 1. SWOT

Analyzing economic and demographic data to understand the Wausau region’s economic potential is a critical starting point, but it does not tell a complete story of the area’s challenges and opportunities. In addition to TIP’s review of relevant data, a qualitative understanding of the Wausau region was developed through meetings with business and community leaders and findings from an online questionnaire for employers and residents. Based on these insights, along with TIP’s experience working with communities throughout Wisconsin and the US, an analysis was created of the region’s strengths, weaknesses, opportunities, and threats—commonly referred to as a SWOT analysis.

For the purposes of this plan, a SWOT analysis is defined as the following:

- **STRENGTHS.** Advantages that can be leveraged to grow and strengthen the regional economy.
- **WEAKNESSES.** Liabilities and barriers to economic development that limit the Wausau region’s growth potential.
- **OPPORTUNITIES.** Assets and positive trends that hold significant potential for increased local business growth, investment, and real estate development.
- **THREATS.** Unfavorable factors and trends that could negatively impact the regional economy.

FIGURE 2. SUMMARY OF SWOT ANALYSIS



STRENGTHS

- The local economy is diverse, driven by the key industries of manufacturing, healthcare, agriculture, and tourism.
- The downtown district is authentic, with strong urban design, buildings, and streetscapes.
- Strong higher education partners (Northcentral Technical College, UW-Stevens Point, Rasmussen College) are present in the region.
- The many outdoor recreation amenities in Wausau region including Granite Peak ski hill, Wisconsin River rapids, hiking and bike trails, state parks and wildlife refuges, make the region unique within Wisconsin and the Midwest.
- Wausau functions as the regional service center for a large geographic area centered on Marathon County, including the 4-county consolidated statistical area (combining Marathon, Wood, Portage, and Lincoln Counties), and for specialized healthcare and other services extending northward to include portions of the Upper Peninsula of Michigan.
- A strong work ethic exists in the region, especially for long-standing industries of manufacturing and agriculture.
- The population is becoming increasingly diverse, thanks in large part to a growing Hmong community in the region.
- The region is served by a full-service local media market (print, television, radio).
- Living options available within Marathon County are diverse (urban, suburban, rural).
- Central Wisconsin Airport (CWA) and its updated terminal facilities provide a strong “front door” and initial impression for visitors (business and leisure travelers) to Wausau from the outside world.



WEAKNESSES

- The population and labor force are declining.
- Broadband infrastructure availability is limited in Marathon County, especially in rural areas.
- The county is large and sparsely populated.
- Wausau has fewer urban amenities than surrounding larger cities such as Madison, Green Bay, Appleton, Milwaukee, Minneapolis-Saint Paul.
- A strong entrepreneurial environment for tech companies and other high-growth firms is lacking.
- Not enough housing options exist, especially for recent college graduates and young professionals.
- The Wausau region is perceived as being in the “North Woods,” and therefore, not having as many offerings and activities available as other parts of the state (Madison, Green Bay/Appleton, Milwaukee).
- No consistent night life or live music scene, that would engage young adults, exists in Wausau.
- There is a limited supply of locally based contractors available for construction projects.
- Social services such as affordable childcare for working parents are lacking.
- There is no consensus on the approach to mall redevelopment in downtown core.



OPPORTUNITIES

- The new Aspirus/YMCA downtown project could bring significant investment and employment growth into downtown Wausau.
- Additional mixed-use development and employment growth in downtown Wausau is possible.
- Creating a shared coworking space in downtown Wausau for entrepreneurs, freelancers, tech workers, remote workers, and others seeking a collaborative, flexible work setting would spur entrepreneurial activity.
- Development of new housing options, including downtown and urban residential could help retain talent and support existing workforce.
- Wausau Center mall could be redeveloped into a dense, urban, mixed-use district.
- Potential designation of Wisconsin Highway 29 (connecting Wausau with Green Bay to the east and with Eau Claire and MSP to the west) as an Interstate Highway could provide more mobility and visibility for the region.
- Stronger regional collaboration for economic and workforce development centered on Marathon County and including Lincoln, Portage, and Wood counties could further unite the region around common goals.
- Growing tourism destinations and events would further strengthen the economy.
- Enhanced workforce development programs could train workers for current and future skill needs.
- Bring new segments of region’s population into the area workforce (including non-traditional categories such as returning veterans, people with criminal records, people with disabilities, and stay-at-home parents) to counteract population decline and labor force decline.
- Creating a “center of excellence” would bring together multiple higher education partners and businesses into a shared location to explore R&D and specialized training opportunities in specific industries.
- Exploring agriculture-related entrepreneurship through kitchen incubators, farmers markets, and other efforts would highlight the region’s strengths and expand entrepreneurial opportunities.
- Expansion of specific UW-Stevens Point programs into Wausau would support existing employers and their talent needs.
- “Rebounder” talent recruitment initiatives could bring back former Central Wisconsin residents now living in other parts of the state and Midwest.

- Interest around a potential Olympic training facility could result in a unique redevelopment opportunity for the mall.
- Expansion of Granite Peak ski hill would strengthen Wausau’s outdoor recreation assets.
- Sites along Wisconsin River and other waterways in Marathon County (e.g., Big Rib River, Eau Claire River) could be leveraged for outdoor recreation and adjacent development such as restaurants and music venues with outdoor seating.
- Winter sports destinations and events could be expanded for business development and talent attraction.
- New events/festivals could draw in outside visitors.
- Potential addition of new nonstop flight destinations to CWA (such as Atlanta, Dallas-Fort Worth, Denver) would bring more visibility and traffic to the region.
- Additional “upstream” investment such as R&D, design, and technology related to existing manufacturing employers would help support the industry against economic fluctuations.
- Expansion of degree programs at Northcentral Technical College would provide more education opportunities for residents.
- Formation of higher ed center (not just satellite campus) would also provide more education opportunities for residents and draw in outside students.



THREATS

- The disruption of traditional industries and employers (such as manufacturing and agriculture) could lead to fewer local jobs.
- Local firms could relocate to or be acquired by outside markets.
- The region continues to lose population, especially young adults and working age population.
- Declining K-12 school enrollment trends are projected for the next several years.
- Funding sources for infrastructure, education, and workforce development are a constant challenge.
- The decline of Wausau Center mall is ongoing.
- Workforce challenges stemming from underlying social issues (such as drug use, criminal records, and lack of services including transportation and access to affordable child care) persist.
- The slow progress on riverfront development, due to perceptions that urban development is a risky proposition in Wausau, holds back urban revitalization efforts.
- Numerous cities, towns, and villages within the county suffer from parochialism.

APPENDIX 2. ECONOMIC ASSESSMENT

To provide a common framework for our recommendations, TIP conducted a demographic and economic assessment of the Wausau region. We began by compiling data on Marathon County, with comparisons to the City of Wausau, the four-county Wausau-Stevens Point-Wisconsin Rapids consolidated statistical area (which includes the four counties of Marathon, Lincoln, Portage, and Wood), the State of Wisconsin, and the US, where appropriate. In addition, we compare the Wausau region to a group of eight benchmark metro areas (three in-state competitors and five out-of-state aspirational peers). As part of the assessment, we also prepared an analysis of the Wausau region's strengths, weaknesses, opportunities, and threats. Results of this analysis, commonly referred to as a SWOT analysis, are also presented. The purpose of the assessment is to understand the region's relative economic position and to highlight its competitive advantages and disadvantages.

The findings presented in this section are based on the following elements.

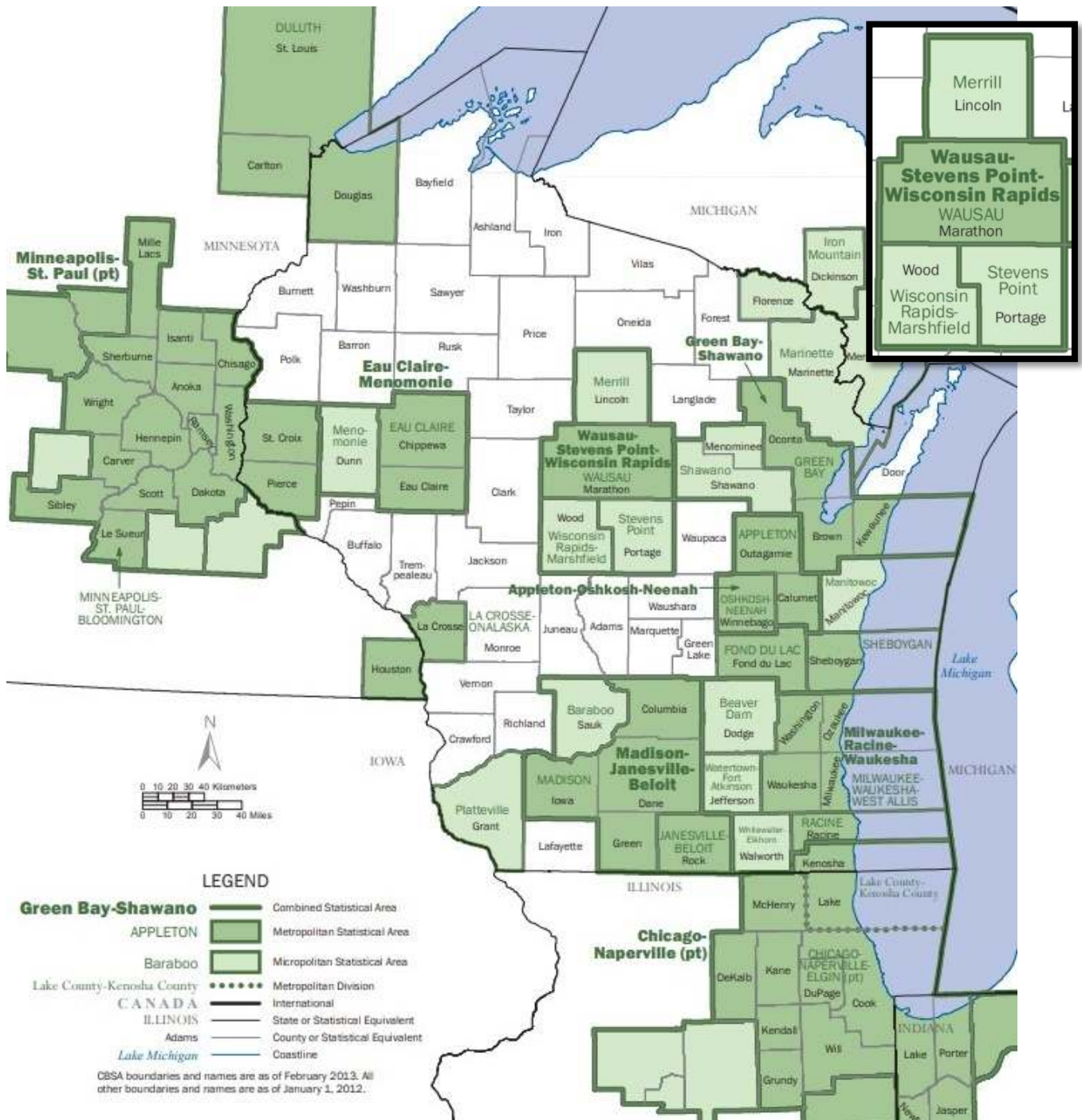
- A review of relevant studies, plans, and other material provided by the Wausau Region Chamber and others.
- A review of economic and demographic data from primary and secondary sources, including the US Census Bureau, the US Bureau of Labor Statistics, and Economic Modeling Specialists Inc. (Emsi).
- Findings from community site visits, interviews, and focus groups with over 100 community representatives and stakeholders.
- TIP's 20 years of experience working with communities across the country and compiling best practices.

When reviewing key findings, it is important to keep in mind Wausau's proximity to other key metropolitan areas and micropolitan areas, including Minneapolis-Saint Paul, Eau Claire, and Appleton, as shown in Figure 3 (page 22).

KEY FINDINGS

- **The Wausau region's employment base has yet to recover from the Great Recession.** As of October 2018, total employment in Marathon County was roughly 77,000, one percent lower than employment in December 2007, the month US employment peaked before the recession began. The region's high concentration of companies involved in manufacturing sectors upstream of the construction industry (wood and paper products, tile and glass products, HVAC machinery, and construction materials) are an important factor in the region's sharp decline during and after the recession, as the home building industry continues to recover from the housing bubble. Even though the region hasn't reached pre-recession employment levels, the region's economy is heading in the right direction, with five years of consecutive employment growth.
- **Population growth in Marathon County has slowed to a near standstill.** The County's estimated 2017 population was 135,732, only 1.2 percent higher than the 2010 population estimate of 134,000. The slowdown in population growth after 2010 mirrors state trends. From 2010 to 2017, Wisconsin's population growth rate slowed significantly, only gaining 1.8 percent. From 2000 to 2010, Marathon County's total population grew from about 126,000 to about 134,000, a growth rate of around 6.5 percent, nearly identical to Wisconsin's approximate 6 percent population growth rate during the same period. These recent trends foretell a troubling economic future for the Wausau region and for the state. Communities that do not add new people cannot expect to add new businesses and are at risk of losing the many existing businesses that rely on a growing labor pool and customer base.

FIGURE 3. WAUSAU MSA AND FOUR-COUNTY CSA



Source: US Census Bureau

- The Wausau region has relatively low higher education attainment.** The share of adults age 25 and up without a high school diploma is much lower in Marathon County (9 percent) and in the four-county region (8 percent) than in the US (13 percent). However, the share of adults with a bachelor's degree or higher is significantly lower in Marathon County and the four-county region (24 percent) compared to Wisconsin (28 percent) and the US (30 percent). The share of adults with some college, including associate degrees, is somewhat higher in Marathon County (31 percent) and the four-county region (32 percent) compared to the US (29 percent).
- Marathon County has gained new residents from surrounding rural counties but has lost residents to larger urban areas in the Midwest.** Since 2010, Marathon County gained more than 1,300 net new residents from Clark, Langlade, Lincoln, Shawano, and Wood Counties. During the same period, Marathon County lost a net total of over 900 residents to Dane, Brown, and Winnebago Counties in Wisconsin and to Ramsey and Hennepin Counties in Minnesota.
- The manufacturing industry is a major economic driver for the Wausau region.** With more than 16,000 workers in Marathon County, and a total of about 30,000 workers in the four-county CSA, the manufacturing sector is arguably the most important economic driver for the Wausau region and the entire surrounding economy of Central Wisconsin. In Marathon County alone, more than 2,500 net inbound commuters travel into the county daily to work in manufacturing jobs. In addition to its direct employment, the industry provides additional economic benefits to the community in the form of wages that are spent on goods and services at local businesses, taxes paid to local governments, philanthropic investments, and support for a wide range of suppliers, service providers, and related industries.
- Marathon County has a tight labor market.** The County's most recent unemployment rate sits at 3 percent, significantly lower than the US rate of 4.2 percent and a historic low compared to the county's unemployment rate since 2007. In addition, the County's labor participation rate (the share of adult workers employed or seeking work) is 69 percent, higher than the US rate of 63 percent.
- Marathon County and the surrounding four-county region have a high concentration of production and agricultural talent.** Location quotients (LQs) measure the relative concentration of workers in comparison to the US overall, where an LQ of 1.00 mirrors the national economy. Production workers are far more prevalent in Marathon County (LQ of 2.66) and the four-county region (2.07) than the US. Farming, fishing, and forestry workers are also much more common in the Wausau region (LQs of 1.54 in Marathon County and 1.98 in the four-county region) than in the broader US economy.
- Air traffic at the Central Wisconsin Airport (CWA) has remained flat since 2012.** CWA is one of the region's strongest assets for economic development, especially with the recent construction of new terminal facilities in 2015. However, the airport's role as a shared regional asset has not been fully leveraged. The total number of domestic air travel passengers flying in/out of CWA is about 25 percent lower than it was 15 years ago in 2003, a similar decline to Green Bay's airport. During the same period, Appleton airport's passenger traffic has grown by more than 20 percent.
- The Wausau region has moderate wage levels,** with an average annual wage of \$44,681 in 2017. This is significantly lower than the US average annual wage of \$55,390 but is higher than half of the benchmark metros including Asheville, Eau Claire, Dubuque, and Bend. The region's solid mid-level wages reflect the local economy's dependence on manufacturing and healthcare, two sectors with a large share of middle-wage, middle-skill jobs. Moderate wage levels also reflect the fact that there are fewer jobs at both the

upper end (tech firms, corporate HQs, professional services) and the lower end of the economic spectrum (tourism, retail, local services).

- **Marathon County is the center of an integrated four-county regional economy, including Lincoln, Portage, and Wood Counties.** The four-county region depends on a shared labor market. Sixty-four percent of Marathon County's workforce resides in Marathon County, and 76 percent of Marathon County's workforce lives in the four-county region. Sixty-seven percent of Marathon County's employed residents also work in the county, while 78 percent of Marathon County's employed residents work somewhere in the four-county region. Additionally, the region has strong connections to surrounding urban areas of Green Bay, Appleton, and Madison, with nearly 6 percent of Marathon County's employed residents commuting to Brown, Dane, and Outagamie Counties.

POPULATION AND DEMOGRAPHICS

FIGURE 4. MARATHON COUNTY POPULATION

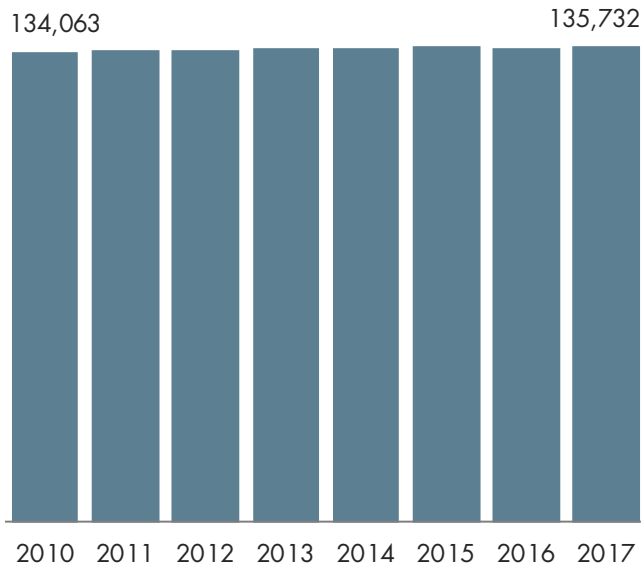


FIGURE 5. MARATHON COUNTY COMPONENTS OF POPULATION CHANGE

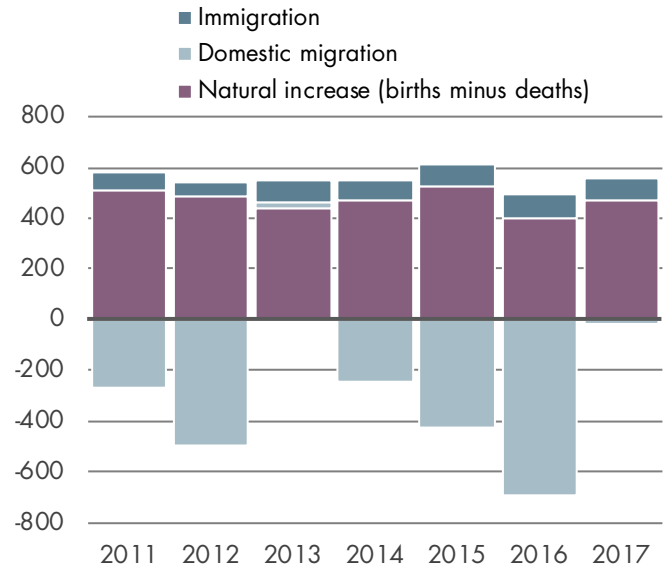
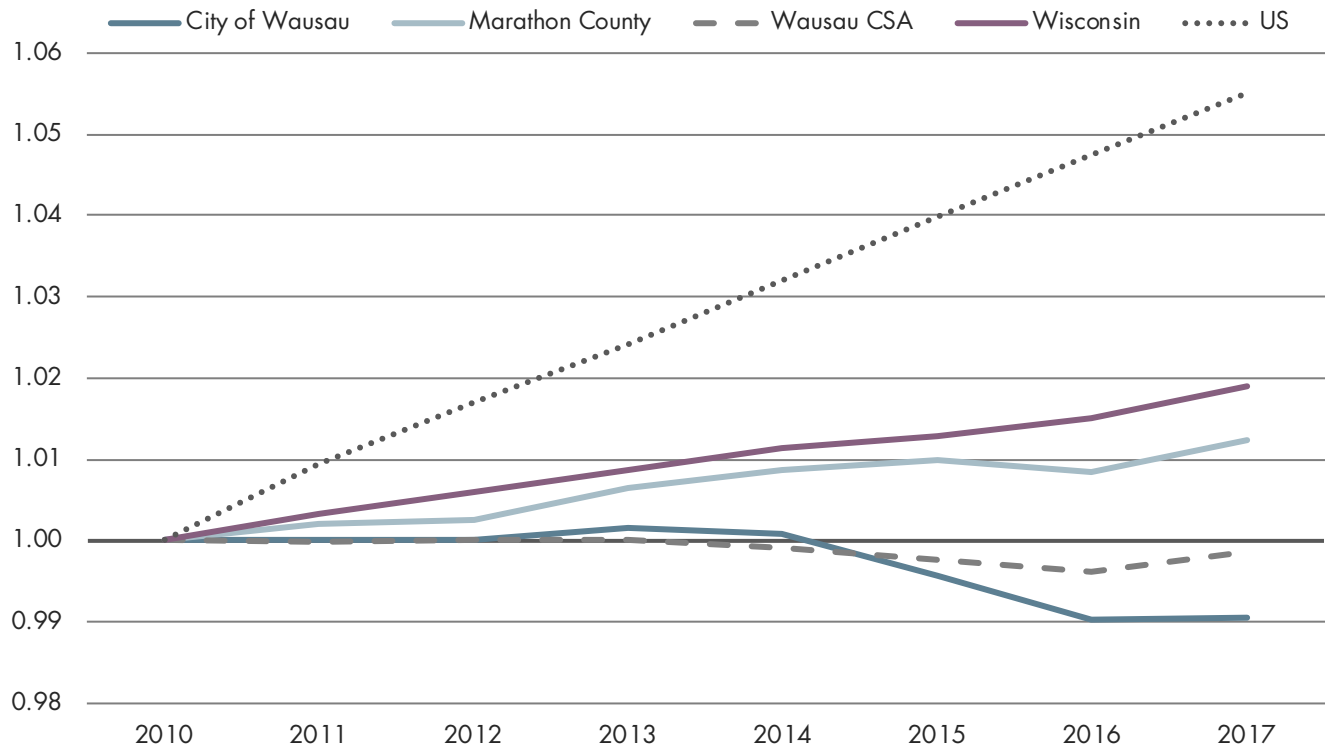


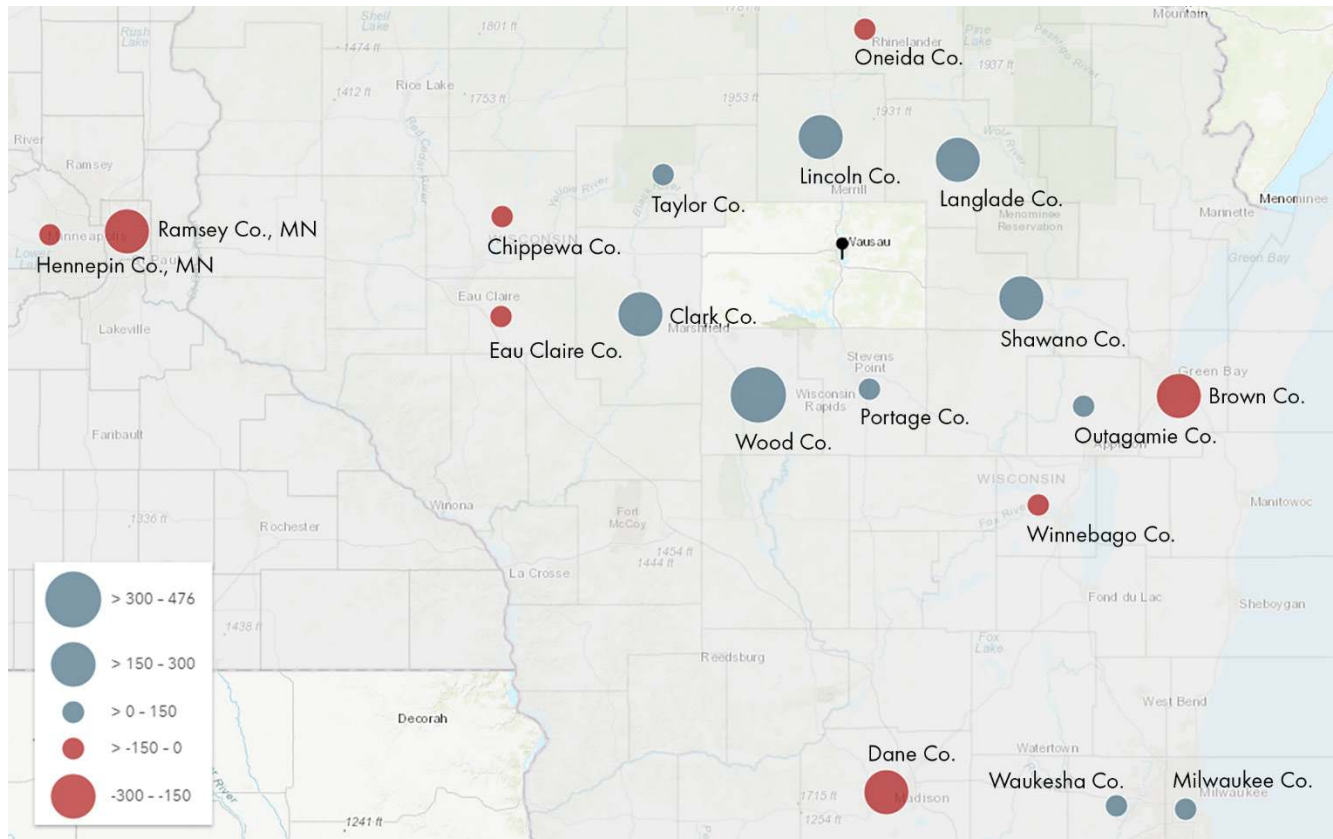
FIGURE 6. COMPARATIVE POPULATION TRENDS INDEXED TO 2010



Source: (all figures) US Census Bureau, Population Estimates Program.

Note: (Figure 5) Total population change includes a residual—a change in population that cannot be attributed to any specific demographic component—which is not shown here. As a result, the sum of the components of change may not equal net population change.

FIGURE 7. MARATHON COUNTY MIGRATION, 2010-2015



COUNTY	INFLOW	OUTFLOW	NET
Wood County	2,684	2,208	476
Lincoln County	1,852	1,599	253
Clark County	1,902	1,667	235
Langlade County	563	387	176
Shawano County	1,004	837	167
Portage County	1,573	1,462	111
Taylor County	644	543	101
Milwaukee County	699	611	88
Waukesha County	270	253	17
Outagamie County	433	430	3
Chippewa County	120	129	-9
Cook County	0	50	-50
Oneida County	589	640	-51
Eau Claire County	366	471	-105
Winnebago County	371	490	-119
Hennepin County, MN	268	409	-141
Brown County	524	691	-167
Ramsey County, MN	106	285	-179
Dane County	820	1,111	-291

Source: (all figures) IRS Migration Data via IRS.gov and Missouri State Data Center.

FIGURE 8. AGE STRUCTURE

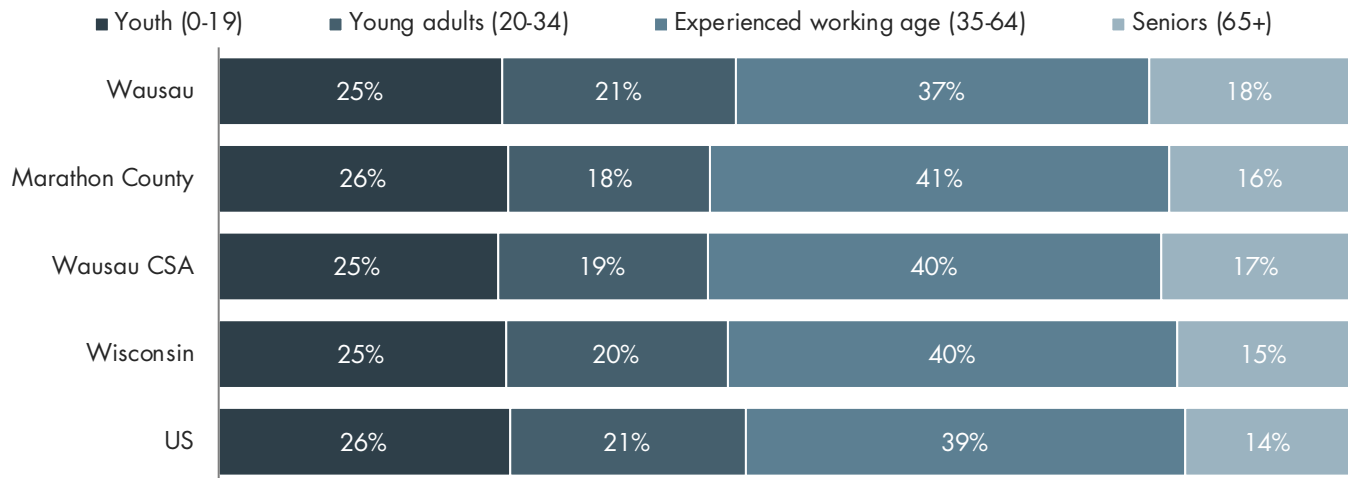


FIGURE 9. FOREIGN BORN (%) OF POPULATION

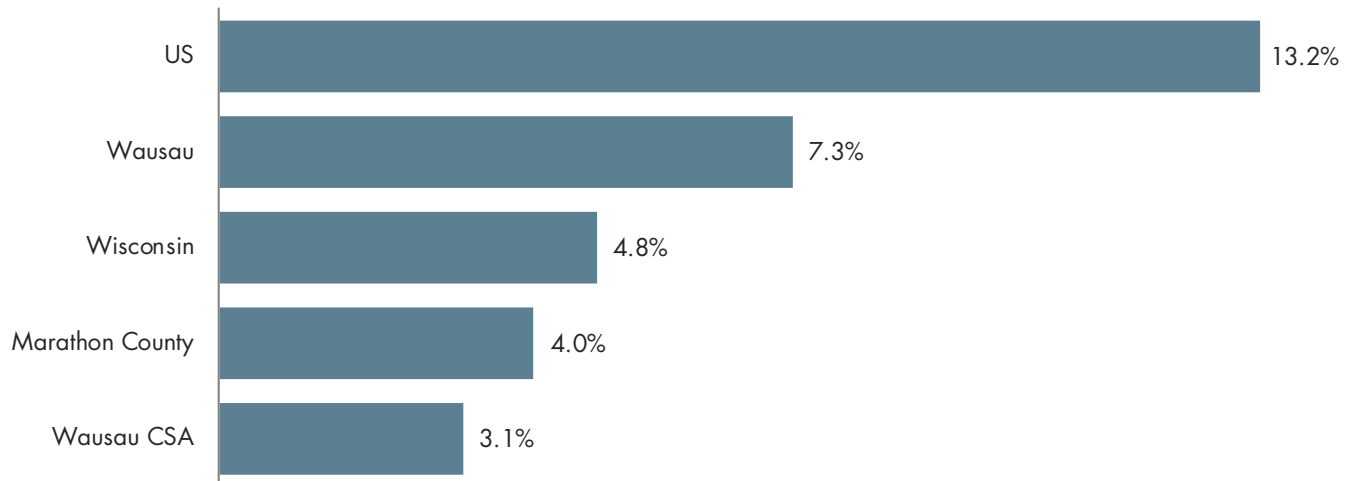
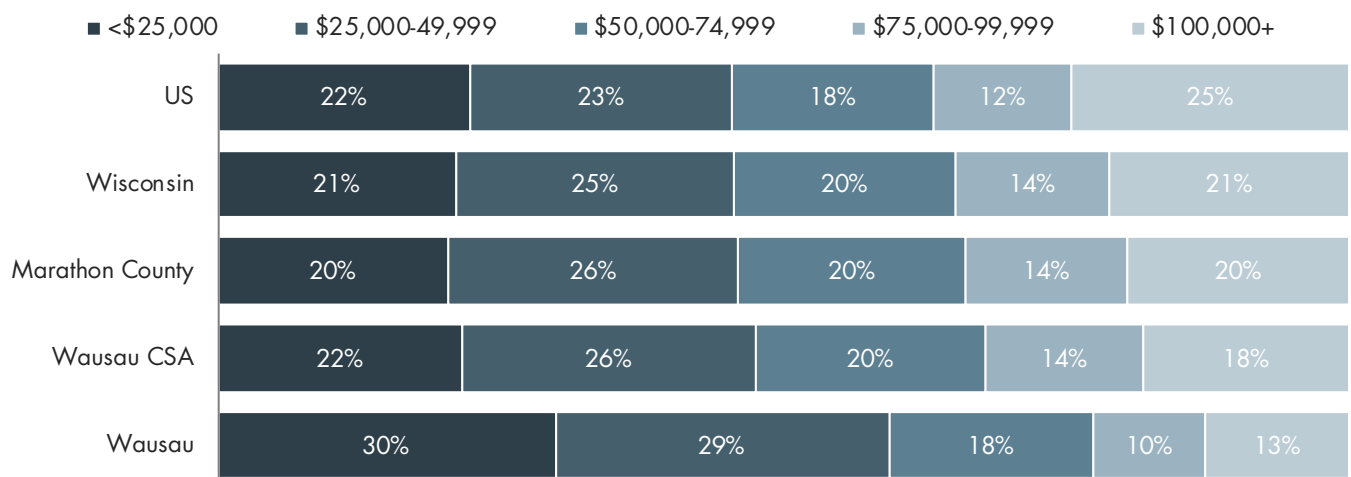


FIGURE 10. HOUSEHOLD INCOME DISTRIBUTION



Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

FIGURE 11. WORKING AT HOME
PERCENT OF WORKERS AGE 16 OR OLDER

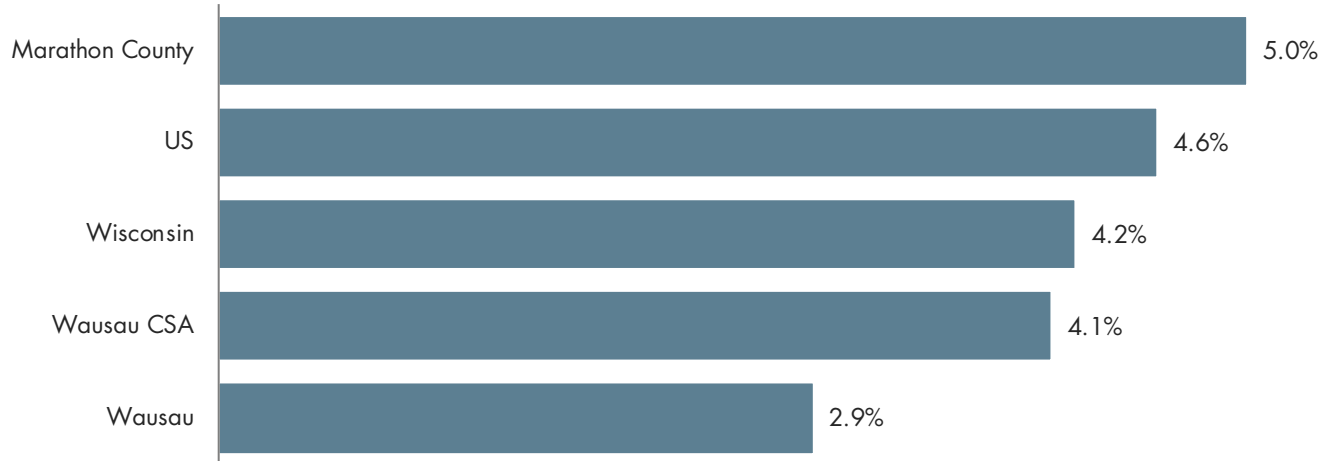
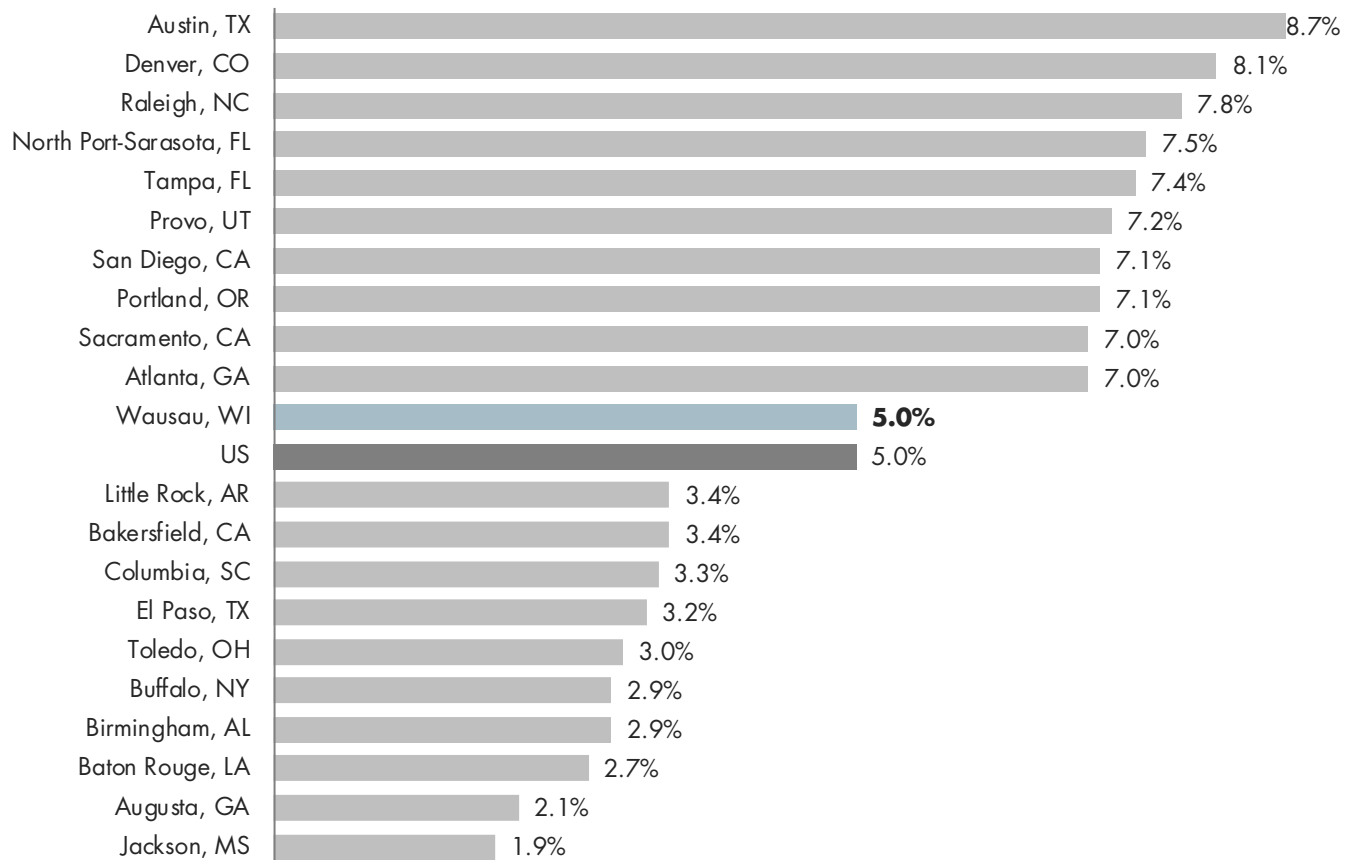


FIGURE 12. WAUSAU METRO PERCENT OF WORKERS WORKING AT HOME (16YRS+)
COMPARED TO TOP 10 AND BOTTOM 10 METROS



Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

FIGURE 13. COMPOSITION OF HOUSEHOLD POPULATION

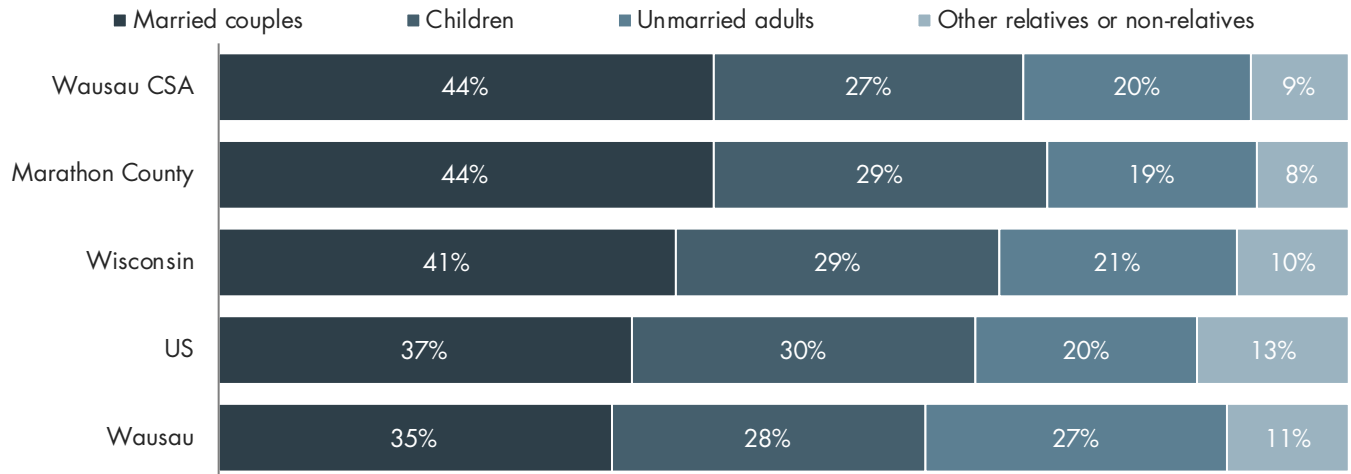
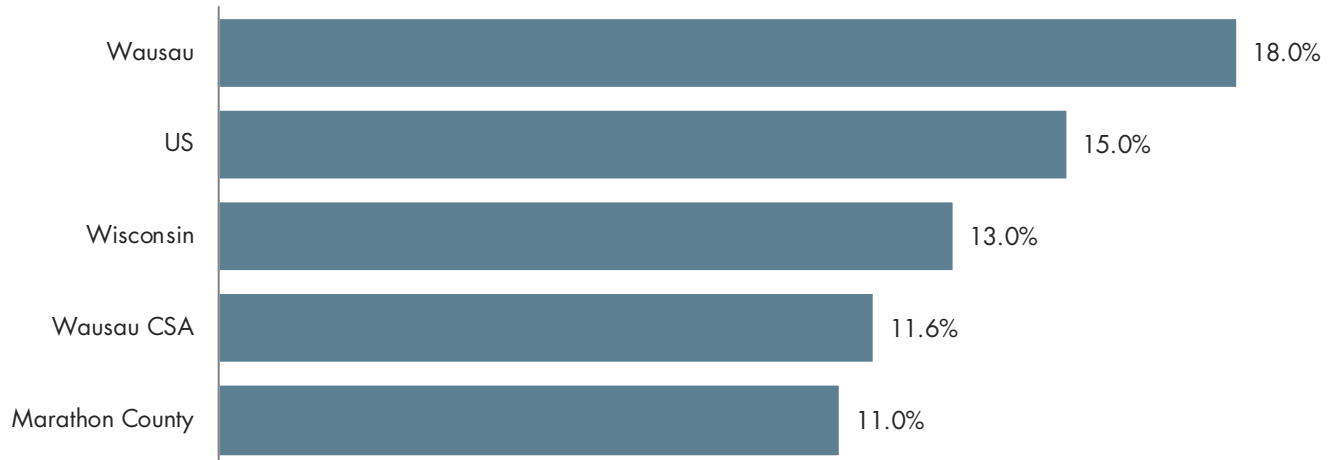


FIGURE 14. POVERTY RATE (%)
PERCENT OF POPULATION BELOW POVERTY LEVEL



Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

HOUSING

FIGURE 15. HOME VALUE DISTRIBUTION

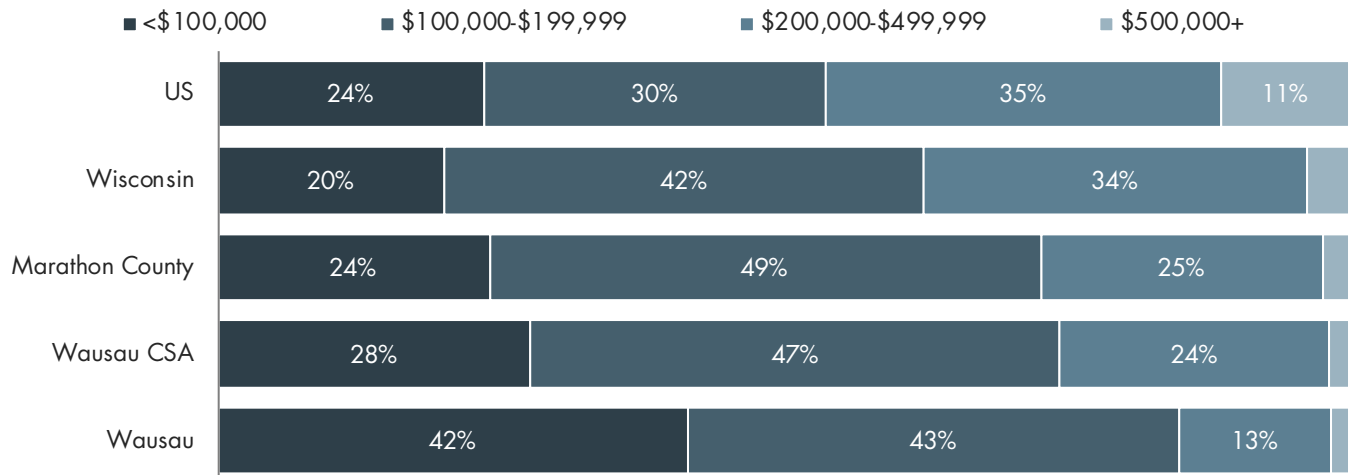
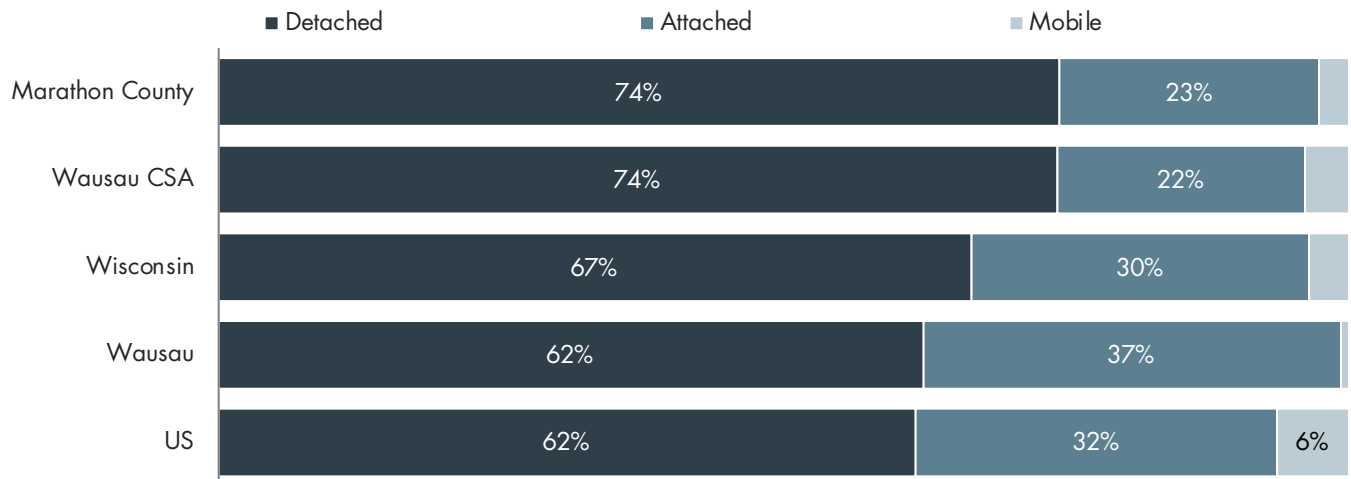


FIGURE 16. HOUSING AFFORDABILITY INDEX
RATIO OF MEDIAN HOME VALUE TO MEDIAN HH INCOME*



FIGURE 17. COMPOSITION OF HOUSING STOCK



*can also be interpreted as the number of years of household income needed to buy a median-priced home.
Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.
Notes: (Figure 16) Data on median home values not available for CSA.

FIGURE 18. AGE OF HOUSING STOCK

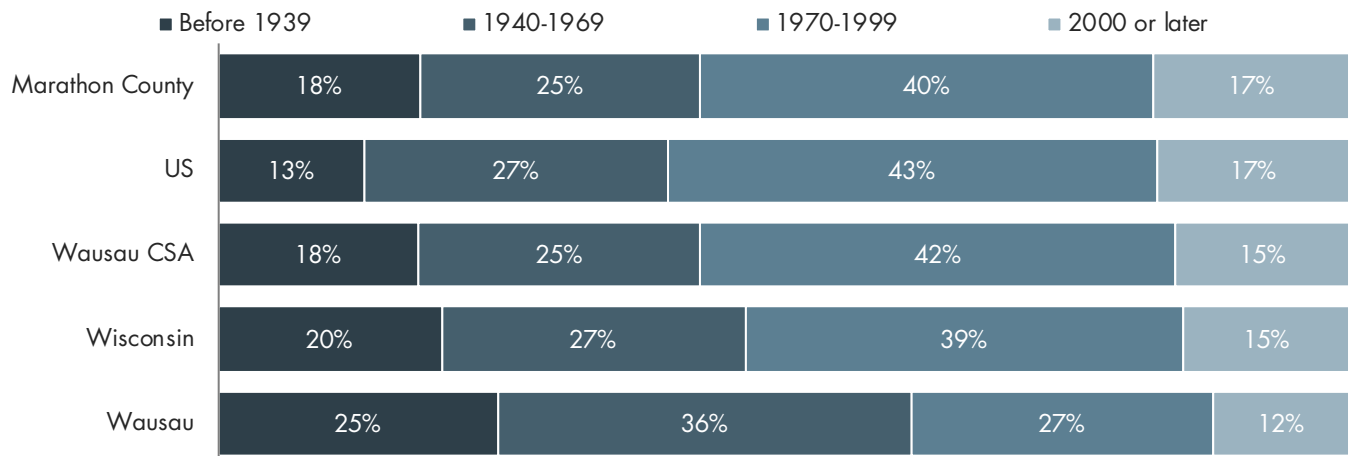


FIGURE 19. OCCUPANCY TYPE

SHARE OF OCCUPIED HOUSING STOCK BY OWNERSHIP/RENTAL STATUS

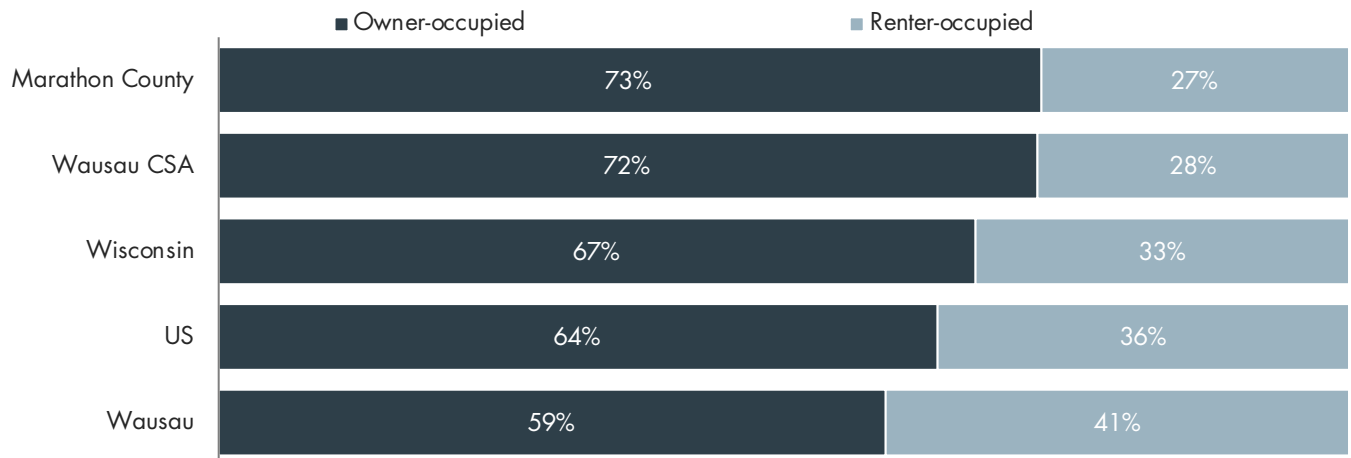
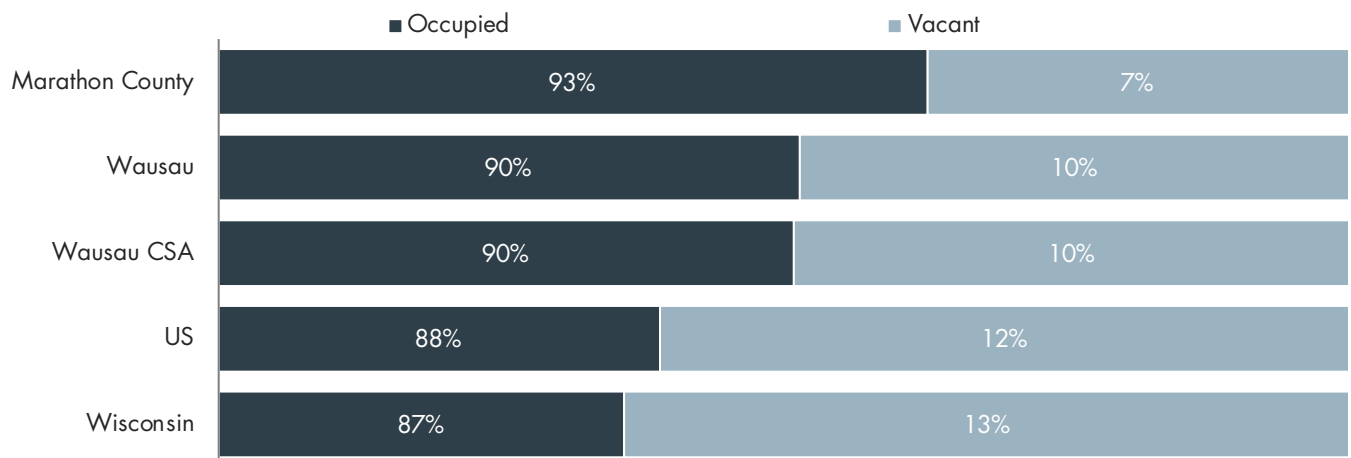


FIGURE 20. HOUSING VACANCY

PERCENT OF TOTAL HOUSING UNITS



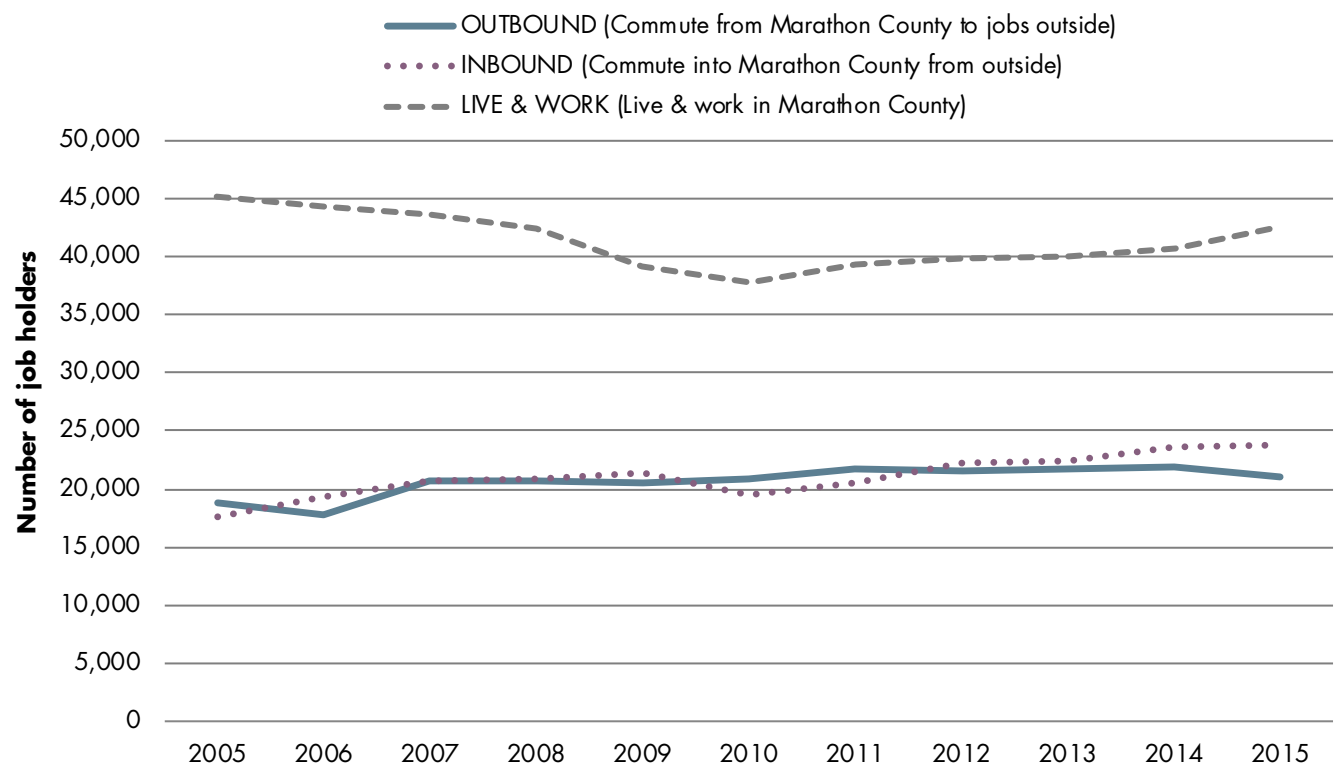
Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

COMMUTING

FIGURE 21. INFLOW/OUTFLOW FOR MARATHON COUNTY, 2015
FLOW OF WORKERS TO/FROM THE COUNTY



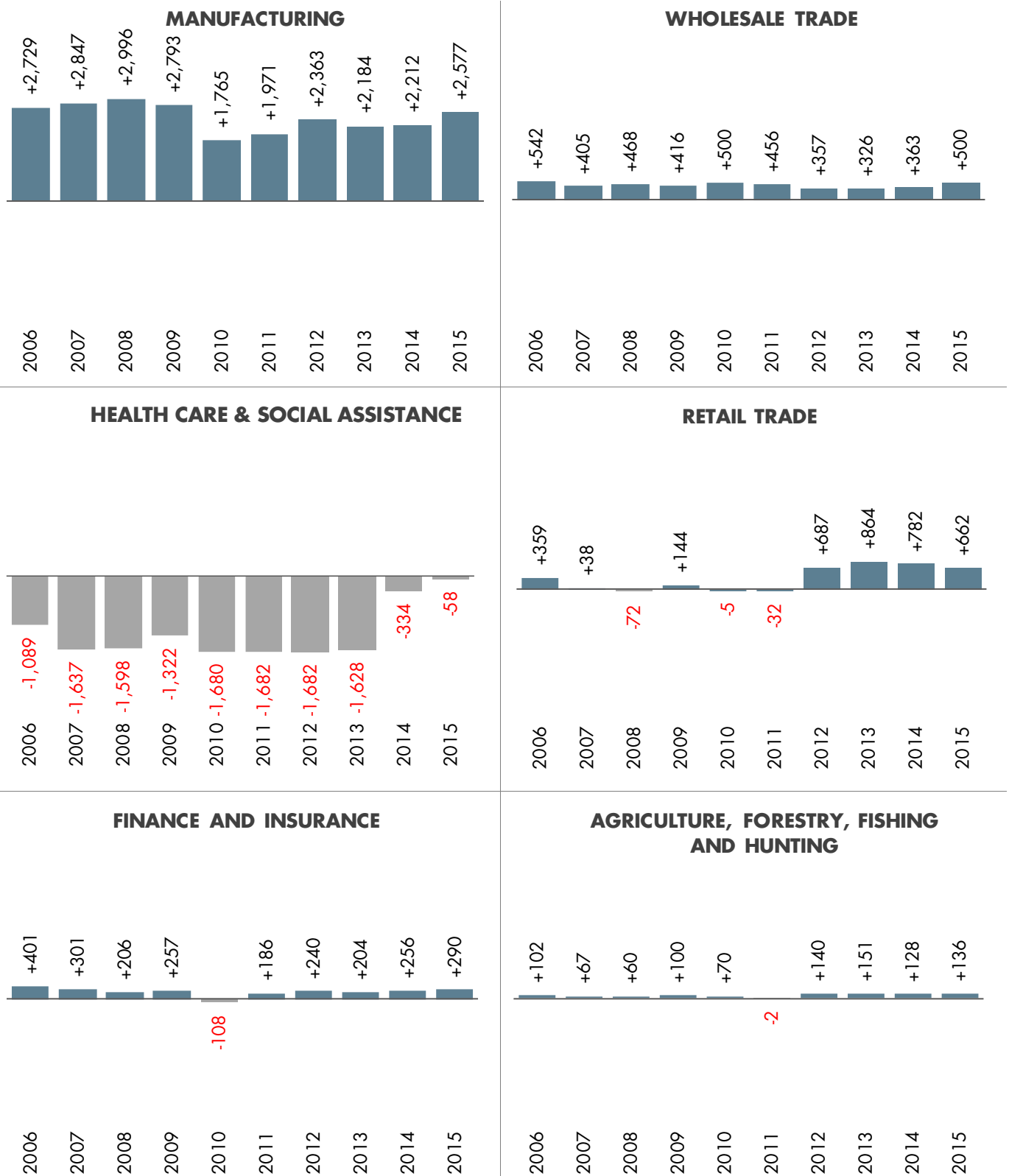
FIGURE 22. COMMUTING FLOWS, 2005 TO 2015



Source: (all figures) US Census Bureau, Local Employment Dynamics.

Note: (Figure 21) Overlay arrows are for illustrative purposes and do not indicate directionality of worker flow between home and employment locations.

FIGURE 23. NET COMMUTING FLOWS BY NAICS INDUSTRY SECTOR
 NET FLOWS = INBOUND - OUTBOUND FLOWS



Source: US Census Bureau, Local Employment Dynamics.

FIGURE 24. NET COMMUTING FLOWS BY NAICS INDUSTRY SECTOR, 2015
NET FLOWS = INBOUND - OUTBOUND FLOWS

SECTOR	INFLOW	OUTFLOW	NET
Manufacturing	16,555	13,978	2,577
Retail Trade	8,032	7,370	662
Wholesale Trade	4,615	4,115	500
Finance & insurance	4,574	4,284	290
Agriculture, Forestry, Fishing and Hunting	866	730	136
Construction	2,352	2,248	104
Utilities	288	207	81
Arts & entertainment	682	622	60
Professional services	2,076	2,018	58
Corporate & regional HQs	1,452	1,407	45
Personal & other services	1,539	1,505	34
Oil, gas, & mining	85	66	19
Property sales & leasing	344	359	-15
Healthcare	9,886	9,944	-58
Education	3,738	3,836	-98
Restaurants, bars, & hotels	3,765	3,967	-202
Information & media	455	745	-290
Administrative services	1,609	1,952	-343
Transportation & warehousing	2,004	2,371	-367
Government	1,381	1,868	-487

FIGURE 25. TOP 10 DESTINATION CITIES, 2015

Where Marathon County workers live

City (Place)	Count	Share
1 Wausau city, WI	12,995	19.6%
2 Weston village, WI	5,523	8.3%
3 Kronenwetter village, WI	2,757	4.2%
4 Rib Mountain CDP, WI	2,073	3.1%
5 Rothschild village, WI	1,993	3.0%
6 Mosinee city, WI	1,551	2.3%
7 Marshfield city, WI	1,328	2.0%
8 Merrill city, WI	1,150	1.7%
9 Maine village, WI	825	1.2%
10 Schofield city, WI	820	1.2%
All Other Locations	35,283	53.2%
Total	66,298	100.0%

Where employed Marathon County residents work

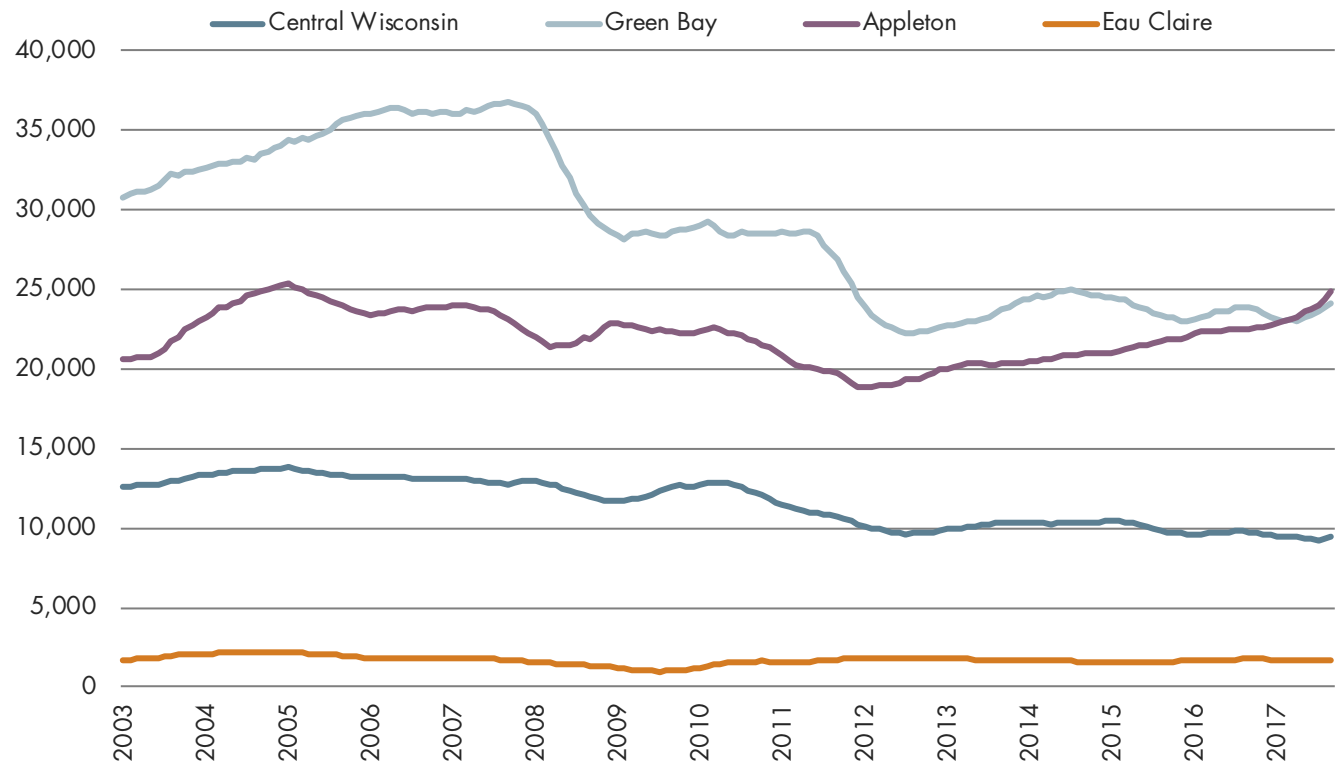
City (Place)	Count	Share
1 Wausau city, WI	20,546	32.3%
2 Weston village, WI	5,064	8.0%
3 Marshfield city, WI	3,376	5.3%
4 Schofield city, WI	3,002	4.7%
5 Rothschild village, WI	2,463	3.9%
6 Rib Mountain CDP, WI	1,740	2.7%
7 Mosinee city, WI	1,729	2.7%
8 Marathon City village, WI	1,640	2.6%
9 Stevens Point city, WI	1,566	2.5%
10 Madison city, WI	1,013	1.6%
All Other Locations	21,453	33.7%
Total	63,592	100.0%

Source: (all sources) US Census Bureau, Local Employment Dynamics.

FIGURE 26. TOP 10 DESTINATION COUNTIES, 2015

Where Marathon County workers live				Where employed Marathon County residents work			
County	Count	Share		County	Count	Share	
1 Marathon County, WI	42,481	64.1%		1 Marathon County, WI	42,481	66.8%	
2 Lincoln County, WI	3,053	4.6%		2 Wood County, WI	4,218	6.6%	
3 Wood County, WI	2,814	4.2%		3 Portage County, WI	2,106	3.3%	
4 Portage County, WI	2,177	3.3%		4 Dane County, WI	1,340	2.1%	
5 Clark County, WI	1,334	2.0%		5 Brown County, WI	1,121	1.8%	
6 Shawano County, WI	1,121	1.7%		6 Outagamie County, WI	1,099	1.7%	
7 Oneida County, WI	903	1.4%		7 Lincoln County, WI	1,075	1.7%	
8 Langlade County, WI	866	1.3%		8 Milwaukee County, WI	944	1.5%	
9 Taylor County, WI	720	1.1%		9 Clark County, WI	787	1.2%	
10 Brown County, WI	664	1.0%		10 Eau Claire County, WI	678	1.1%	
All Other Locations	10,165	15.3%		All Other Locations	7,743	12.2%	
Total	66,298	100.0%		Total	63,592	100.0%	

FIGURE 27. CENTRAL WISCONSIN AIRPORT AIR TRAVEL TRENDS
AVERAGE MONTHLY DOMESTIC PASSENGERS (12-MONTH ROLLING AVERAGE)



Source: (Figure 26) US Census Bureau, Local Employment Dynamics; (Figure 27) US Dept. of Transportation, Bureau of Transportation Statistics.

INDUSTRY

FIGURE 28. MARATHON COUNTY EMPLOYMENT

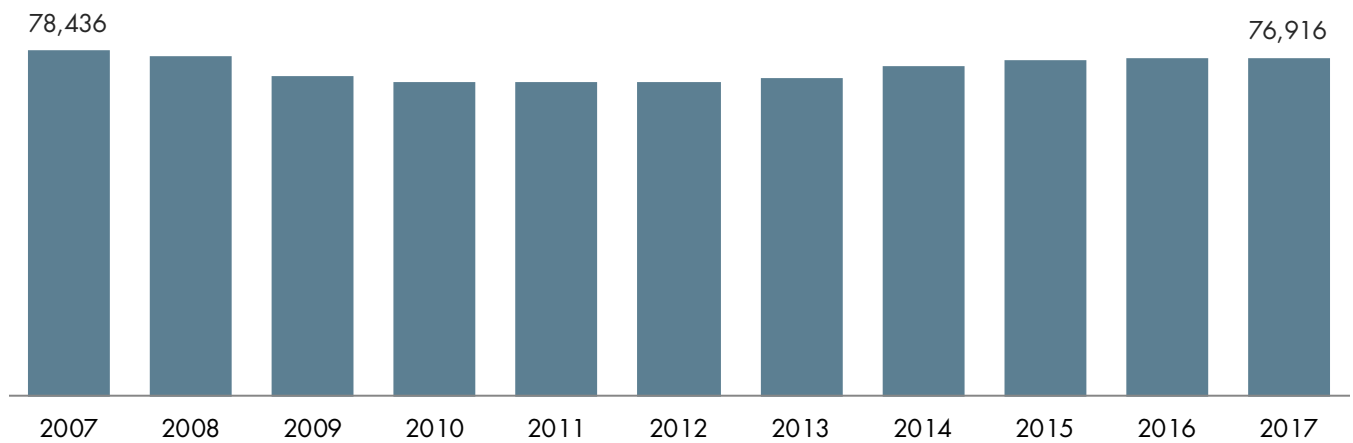
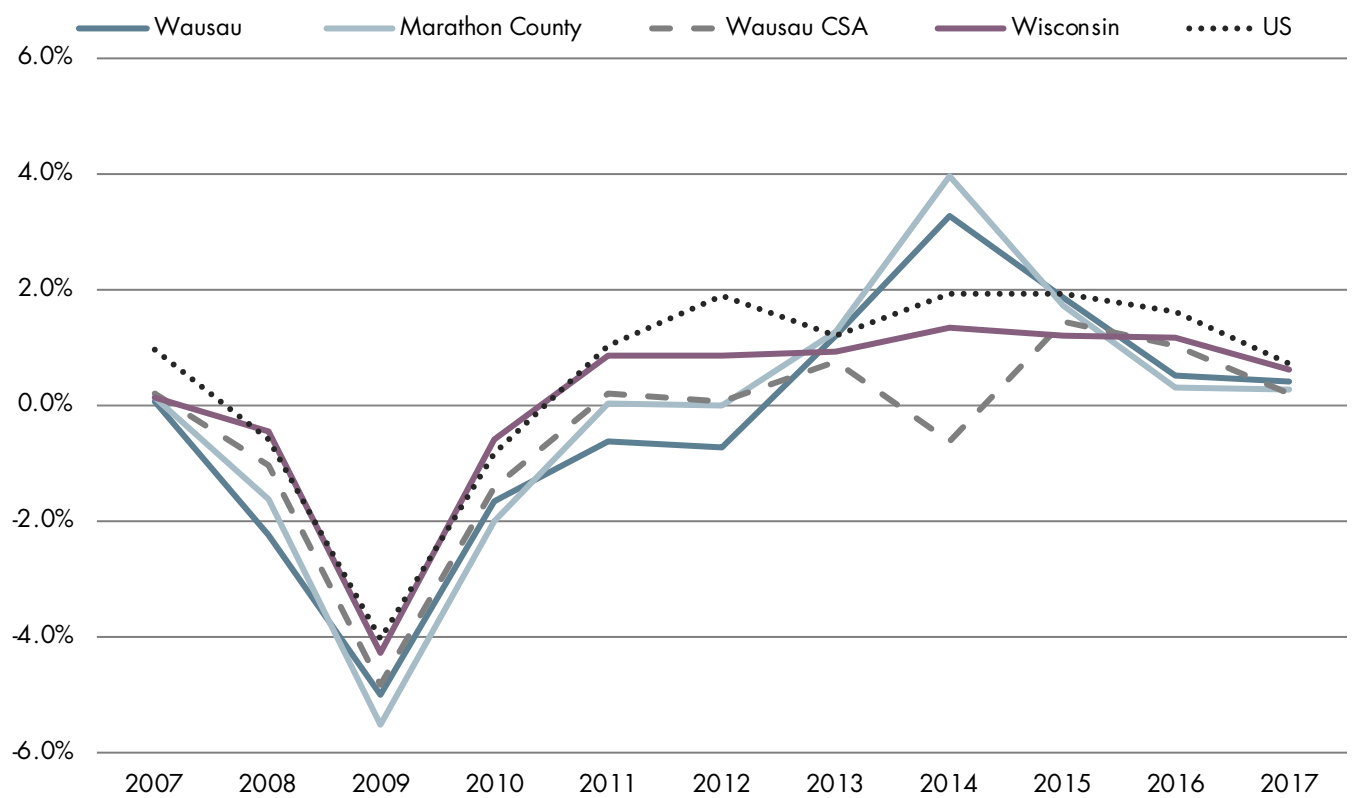


FIGURE 29. ANNUAL JOB GROWTH (PERCENT)



Source: (All figures) EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

INDUSTRY DISTRIBUTION (PERCENT OF TOTAL)

COMPARISON OF WAUSAU WITH SELECTED GEOGRAPHIES AND US

NAICS Code & Description		Marathon				
		Wausau	County	Wausau CSA	Wisconsin	US
62	Healthcare & social assistance*	17.6%	13.1%	14.1%	13.5%	13.4%
44-45	Retail trade	13.9%	10.7%	11.0%	10.2%	10.5%
31-33	Manufacturing	13.7%	21.4%	17.4%	15.1%	8.0%
52	Finance & insurance	10.2%	6.5%	6.7%	4.2%	3.9%
72	Lodging, restaurants, & bars	6.7%	6.4%	6.9%	7.8%	8.7%
61	Education*	6.1%	6.0%	6.8%	8.4%	9.4%
55	Corporate & regional offices	5.8%	3.7%	2.1%	2.2%	1.4%
81	Personal & other services	3.4%	3.7%	4.3%	4.7%	4.9%
23	Construction	3.2%	4.0%	4.0%	4.7%	5.5%
54	Professional services	3.2%	2.8%	2.5%	4.0%	6.5%
56	Administrative & support services	3.1%	2.8%	2.8%	5.1%	6.3%
42	Wholesale trade	3.0%	5.8%	4.2%	4.1%	3.8%
48-49	Transportation & warehousing*	2.9%	3.4%	5.5%	3.8%	3.9%
9039	Local government	2.1%	3.0%	4.0%	4.1%	3.6%
11	Agriculture & forestry	1.8%	2.9%	3.7%	1.9%	1.2%
71	Arts, entertainment, & recreation	1.5%	1.6%	1.2%	1.5%	1.7%
51	Information	0.8%	0.5%	1.2%	1.6%	1.9%
53	Property sales & leasing	0.6%	0.8%	0.7%	1.1%	1.7%
9029	State government	0.2%	0.3%	0.3%	1.1%	1.4%
9011	Federal government (civilian)	0.1%	0.2%	0.2%	0.6%	1.4%
22	Utilities	0.0%	0.4%	0.3%	0.3%	0.4%
21	Mining (incl. oil & gas)	0.0%	0.1%	0.1%	0.1%	0.4%

*Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

Note: Three largest industries are highlighted.

INDUSTRY CONCENTRATION (LQ)

COMPARISON OF WAUSAU WITH SELECTED GEOGRAPHIES AND US

NAICS Code & Description		Marathon				
		Wausau	County	Wausau CSA	Wisconsin	US
55	Corporate & regional offices	4.13	2.57	1.46	1.56	1.00
52	Finance & insurance	2.62	1.68	1.72	1.07	1.00
31-33	Manufacturing	1.74	2.71	2.21	1.91	1.00
11	Agriculture & forestry	1.49	2.41	3.07	1.58	1.00
44-45	Retail trade	1.36	1.04	1.06	0.99	1.00
62	Healthcare & social assistance*	1.31	0.97	1.05	1.00	1.00
71	Arts, entertainment, & recreation	0.85	0.90	0.70	0.85	1.00
42	Wholesale trade	0.80	1.54	1.11	1.08	1.00
72	Lodging, restaurants, & bars	0.78	0.74	0.80	0.90	1.00
48-49	Transportation & warehousing*	0.76	0.87	1.40	0.98	1.00
81	Personal & other services	0.70	0.76	0.90	0.97	1.00
61	Education*	0.65	0.64	0.72	0.89	1.00
9039	Local government	0.60	0.84	1.12	1.15	1.00
23	Construction	0.59	0.73	0.74	0.85	1.00
56	Administrative & support services	0.50	0.45	0.44	0.81	1.00
54	Professional services	0.50	0.44	0.39	0.63	1.00
51	Information	0.41	0.29	0.66	0.85	1.00
53	Property sales & leasing	0.35	0.46	0.43	0.63	1.00
22	Utilities	0.14	1.10	0.78	0.88	1.00
9029	State government	0.13	0.18	0.24	0.74	1.00
901199	Federal government (civilian)	0.09	0.14	0.11	0.40	1.00
21	Mining (incl. oil & gas)	0.06	0.34	0.23	0.28	1.00

ABOUT LOCATION QUOTIENTS (LQS)

Location quotient analysis is a statistical technique used to suggest areas of relative advantage based on a region’s employment base. LQs are calculated as an industry’s share of total local employment divided by the same industry’s share of employment at the national level:

$$\frac{\text{(local employment in industry x / total local employment -all industries)}}{\text{(national employment in industry x / total national employment-all industries)}}$$

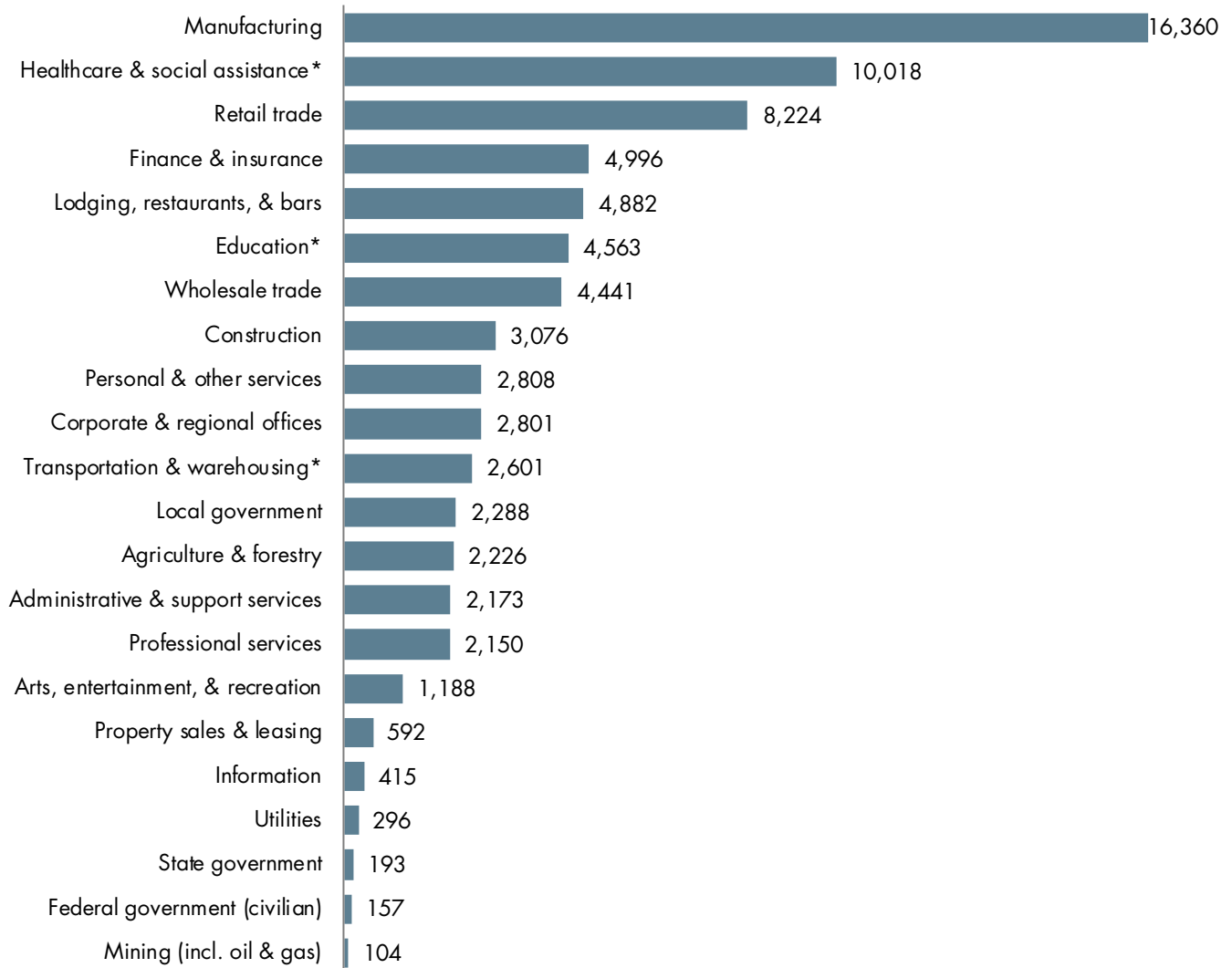
If the local industry and national industry are perfectly proportional, the LQ will be 1.00. LQs greater than 1.25 are presumed to indicate a comparative advantage; those below 0.75 suggest areas of weakness but also point to opportunities for expansion or attraction.

*Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers)

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

Note: LQs greater than 1.25 are presumed to show competitive advantage and are highlighted.

MARATHON COUNTY JOB BASE BY INDUSTRY SECTOR, 2017



*Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

MARATHON COUNTY NET CHANGE IN JOBS SINCE THE RECESSION, 2008-2017

55	Corporate & regional offices	2,184
62	Healthcare & social assistance*	1,211
71	Arts, entertainment, & recreation	475
22	Utilities	210
56	Administrative & support services	175
11	Agriculture & forestry	134
9039	Local government	92
61	Education*	62
9029	State government	60
72	Lodging, restaurants, & bars	26
21	Mining (incl. oil & gas)	24
53	Property sales & leasing	23
901199	Federal government (civilian)	22
54	Professional services	12
51	Information	-293
42	Wholesale trade	-400
23	Construction	-499
52	Finance & insurance	-562
81	Personal & other services	-576
44	Retail trade	-619
48	Transportation & warehousing*	-664
31	Manufacturing	-1,298

*Includes related public-sector employment (e.g., education includes public schools, colleges, and universities; healthcare includes public hospitals; and transportation and warehousing includes US Postal Service workers).

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

WORKFORCE & EDUCATION

FIGURE 30. LABOR MARKET OVERVIEW, 2017

GEOGRAPHY	CIVILIAN LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	UNEMPLOYMENT RATE
Wausau	19,923	19,283	640	3.2%
Marathon County	74,325	72,132	2,193	3.0%
Wausau CSA	165,050	159,745	5,305	3.2%
Wisconsin	3,151,909	3,048,242	103,667	3.3%
US	160,320,000	153,337,000	6,982,000	4.4%

FIGURE 31. MARATHON COUNTY CIVILIAN LABOR FORCE

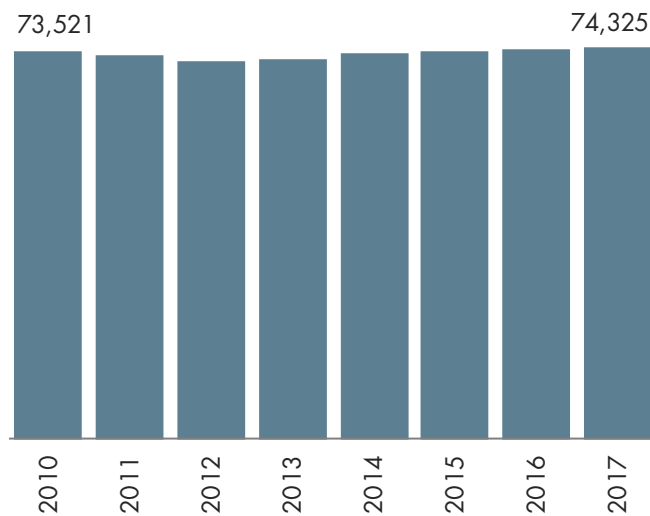


FIGURE 32. HISTORICAL RANGE* AND 2017 AVG. UNEMPLOYMENT RATE

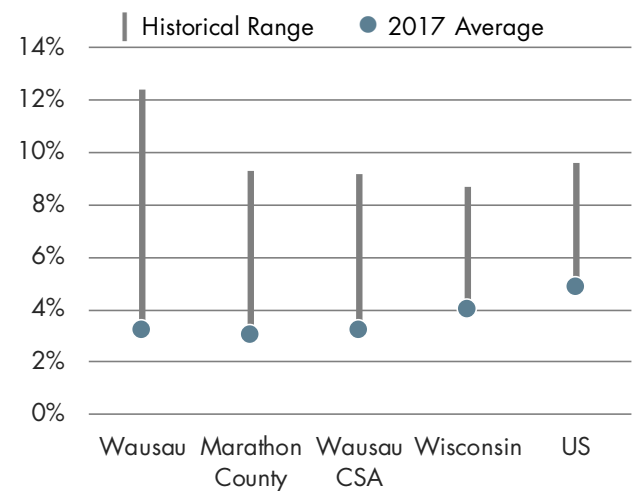
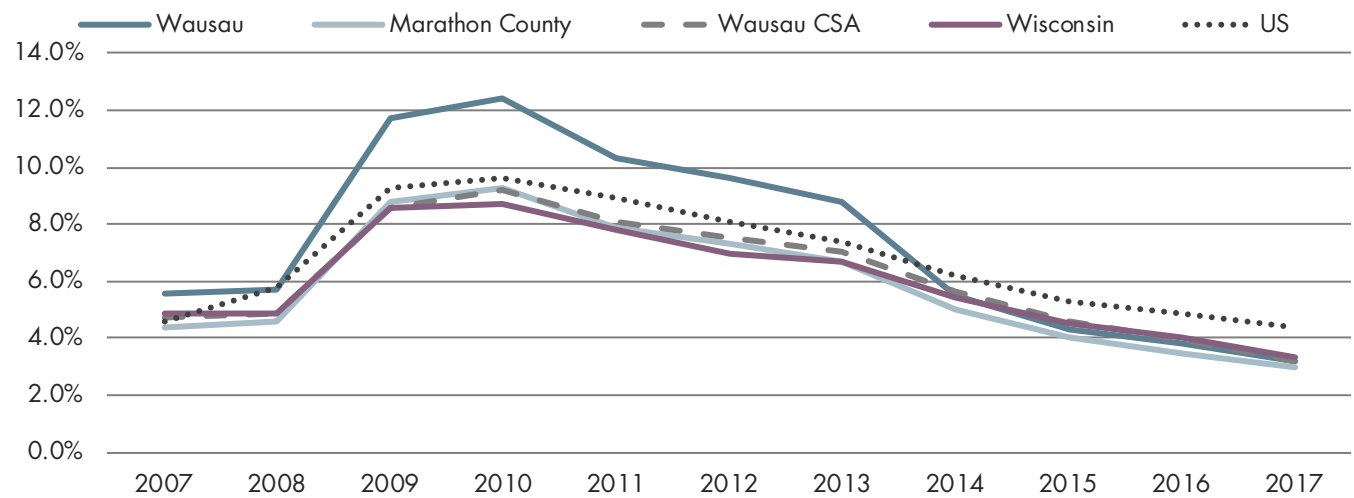


FIGURE 33. UNEMPLOYMENT RATES



*Historical Range = 2007 to present year.

Source: (all figures) US Bureau of Labor Statistics, Current Population Survey (national figures) and Local Area Unemployment Statistics (state and local).

Notes: Annual averages for 2017 were calculated based on available monthly figures and are not official releases.

FIGURE 34. EDUCATIONAL ATTAINMENT

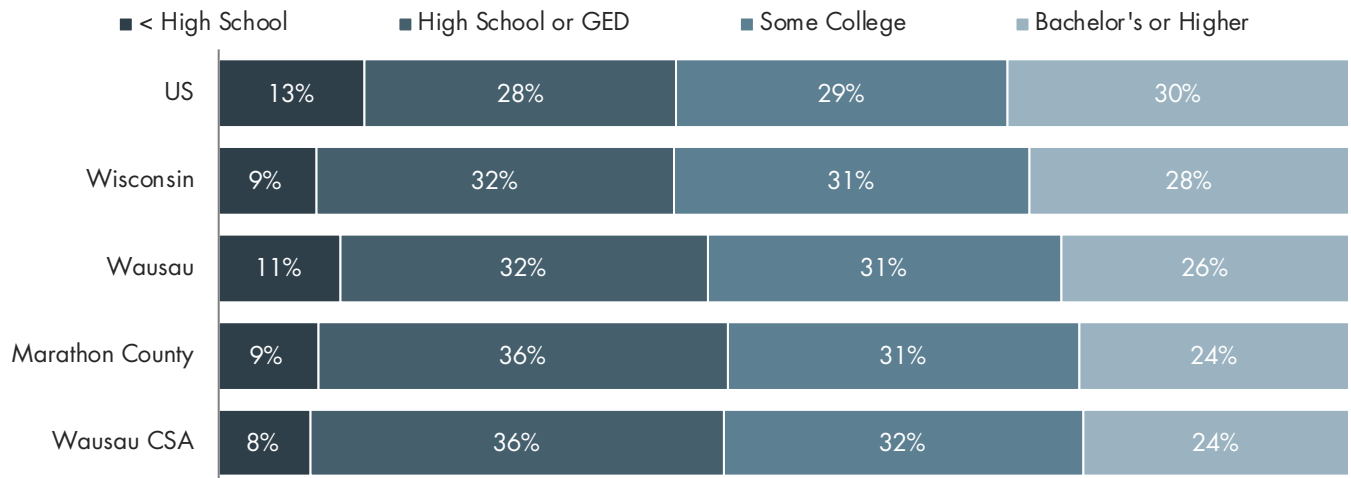
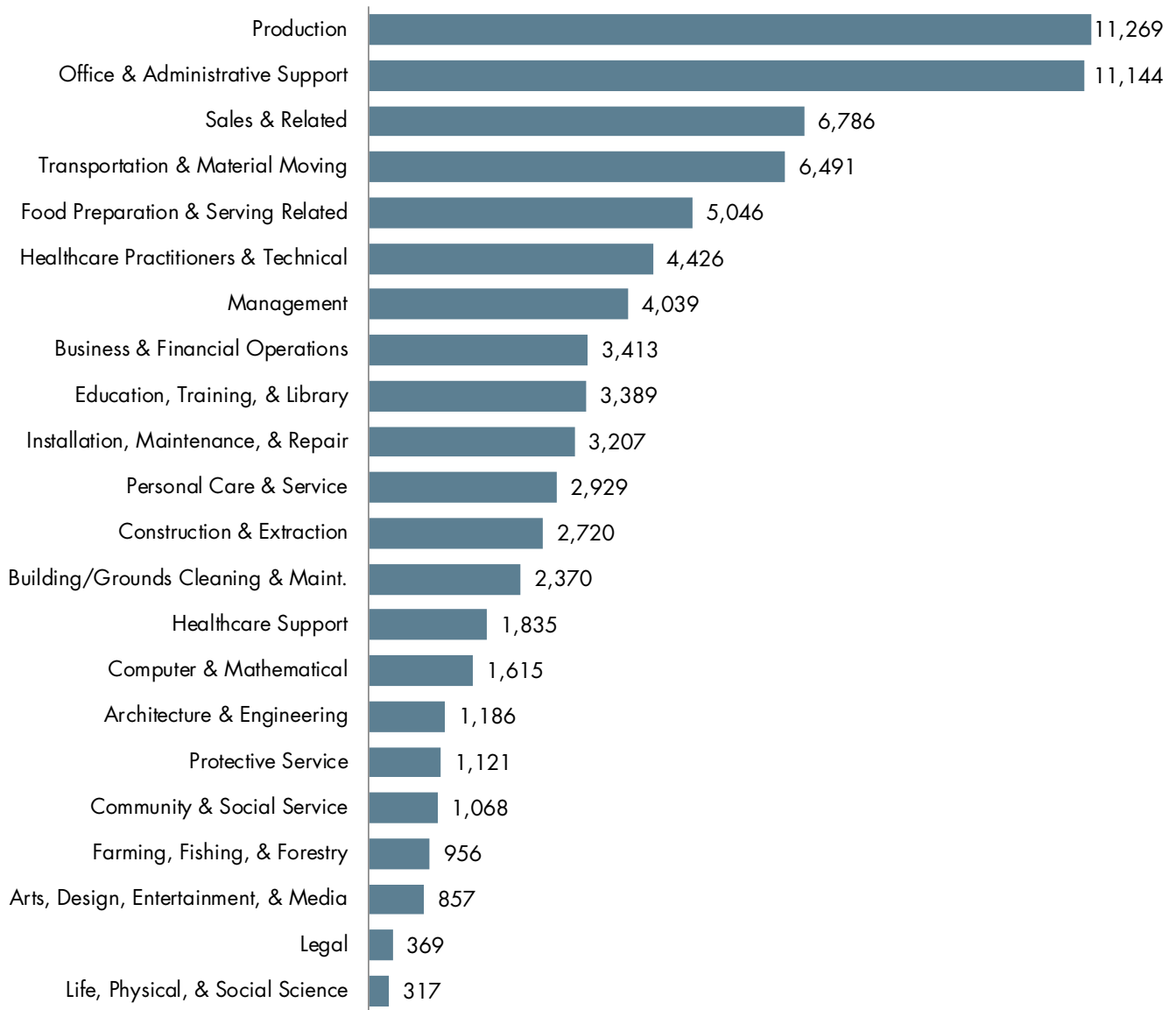


FIGURE 35. LABOR FORCE PARTICIPATION



Source: (all figures) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016.

FIGURE 36. MARATHON COUNTY EMPLOYMENT BY OCCUPATION



Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
 Notes: Excludes military and unclassified occupations.

FIGURE 37. OCCUPATIONAL DISTRIBUTION (PERCENT OF TOTAL)
COMPARISON OF MARATHON COUNTY WITH SELECTED GEOGRAPHIES AND US

SOC Code & Description	Wausau	Marathon County	Wausau CSA	Wisconsin	US
51 Production	10.0%	14.7%	12.2%	10.4%	5.9%
43 Office & Administrative Support	17.1%	14.5%	14.8%	14.1%	14.9%
41 Sales & Related	10.0%	8.8%	8.8%	9.2%	9.9%
53 Transportation & Material Moving	6.9%	8.4%	8.9%	7.0%	6.6%
35 Food Preparation & Serving Related	7.1%	6.6%	7.2%	8.0%	8.4%
29 Healthcare Practitioners & Technical	7.9%	5.8%	5.6%	5.4%	5.5%
11 Management	5.1%	5.3%	5.9%	5.5%	5.4%
13 Business & Financial Operations	5.5%	4.4%	4.4%	4.6%	5.1%
25 Education, Training, & Library	4.3%	4.4%	4.7%	5.6%	5.7%
49 Installation, Maintenance, & Repair	3.2%	4.2%	4.1%	3.8%	3.8%
39 Personal Care & Service	4.4%	3.8%	4.1%	5.1%	4.1%
47 Construction & Extraction	2.8%	3.5%	3.6%	3.9%	4.5%
37 Building/Grounds Cleaning & Maint	2.4%	3.1%	2.9%	3.3%	3.7%
31 Healthcare Support	3.0%	2.4%	2.5%	2.4%	2.8%
15 Computer & Mathematical	2.8%	2.1%	2.1%	2.5%	2.8%
17 Architecture & Engineering	1.2%	1.5%	1.2%	1.7%	1.6%
33 Protective Service	1.4%	1.5%	1.4%	1.8%	2.2%
21 Community & Social Service	1.7%	1.4%	1.5%	1.7%	1.6%
45 Farming, Fishing, & Forestry	0.8%	1.2%	1.5%	0.8%	0.8%
27 Arts, Design, Entertainment, & Medic	1.3%	1.1%	1.1%	1.5%	1.8%
23 Legal	0.8%	0.5%	0.4%	0.5%	0.8%
19 Life, Physical, & Social Science	0.4%	0.4%	0.5%	0.7%	0.8%

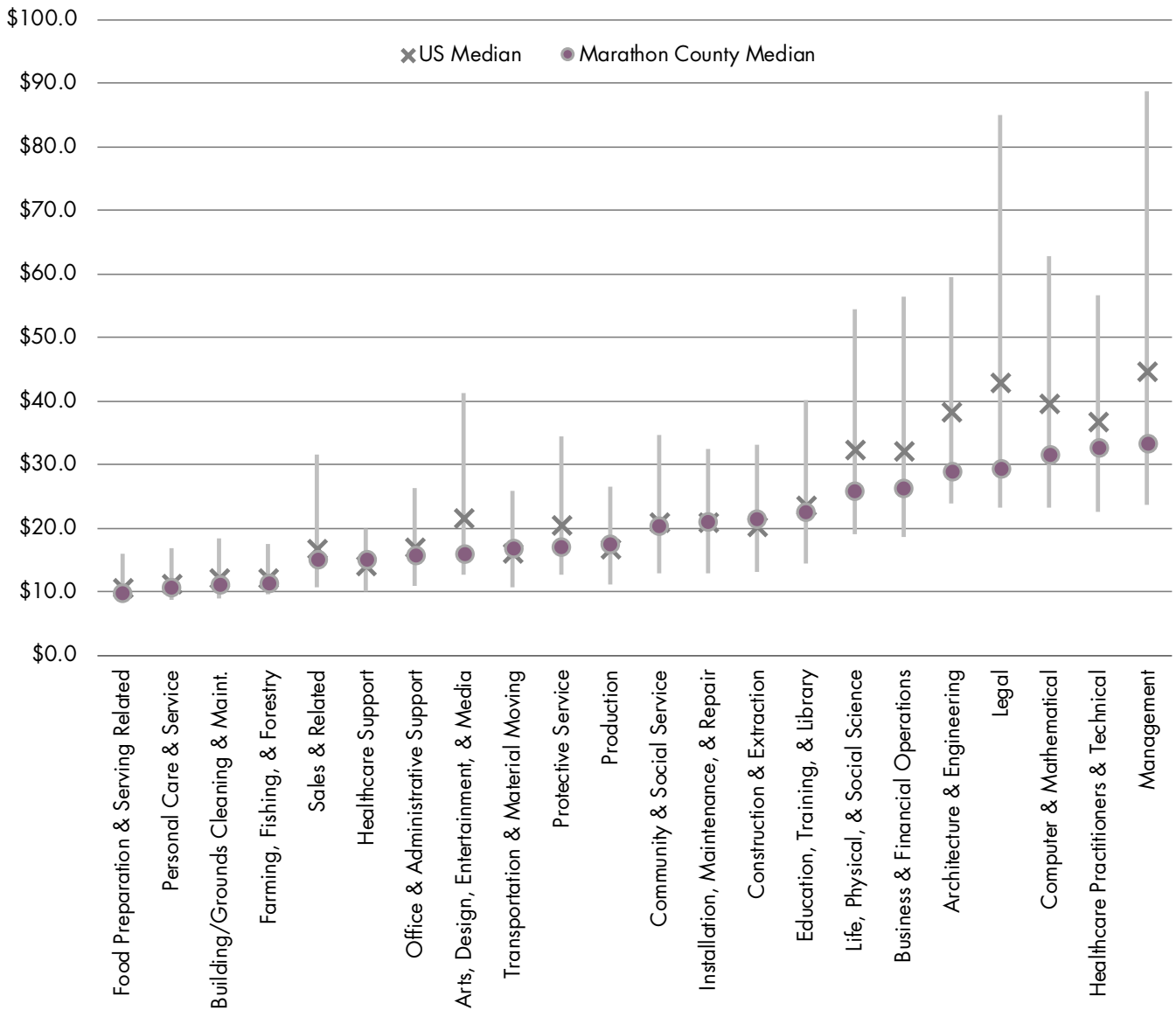
Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
Notes: Excludes military and unclassified employment. Three largest occupations are highlighted.

FIGURE 38. OCCUPATIONAL CONCENTRATION (LQ)
 COMPARISON OF MARATHON COUNTY WITH SELECTED GEOGRAPHIES AND US

SOC Code & Description	Wausau	Marathon County	Wausau CSA	Wisconsin	US
51 Production	1.71	2.49	2.07	1.78	1.00
45 Farming, Fishing, & Forestry	1.04	1.64	1.98	1.10	1.00
53 Transportation & Material Moving	1.05	1.28	1.35	1.06	1.00
49 Installation, Maintenance, & Repair	0.84	1.10	1.09	1.00	1.00
29 Healthcare Practitioners & Technical	1.43	1.05	1.02	0.97	1.00
43 Office & Administrative Support	1.15	0.97	0.99	0.94	1.00
11 Management	0.93	0.97	1.08	1.02	1.00
17 Architecture & Engineering	0.71	0.94	0.74	1.03	1.00
39 Personal Care & Service	1.05	0.92	1.00	1.22	1.00
41 Sales & Related	1.01	0.89	0.89	0.92	1.00
13 Business & Financial Operations	1.10	0.88	0.87	0.92	1.00
31 Healthcare Support	1.10	0.87	0.90	0.86	1.00
21 Community & Social Service	1.03	0.85	0.91	1.02	1.00
37 Building/Grounds Cleaning & Maint.	0.64	0.82	0.78	0.88	1.00
47 Construction & Extraction	0.63	0.79	0.80	0.87	1.00
35 Food Preparation & Serving Related	0.85	0.78	0.86	0.95	1.00
25 Education, Training, & Library	0.75	0.78	0.82	0.98	1.00
15 Computer & Mathematical	1.00	0.74	0.73	0.90	1.00
33 Protective Service	0.61	0.65	0.61	0.81	1.00
27 Arts, Design, Entertainment, & Media	0.71	0.62	0.61	0.84	1.00
23 Legal	0.94	0.59	0.50	0.64	1.00
19 Life, Physical, & Social Science	0.53	0.52	0.67	0.85	1.00

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
 Notes: Excludes military and unclassified employment. LQs greater than 1.25 are presumed to show competitive advantage and are highlighted.

FIGURE 39. MARATHON COUNTY WAGES IN THE CONTEXT OF THE NATIONAL WAGE RATES BY MAJOR OCCUPATIONAL GROUP



Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
 Note: Figures exclude military occupations. Line = US wage range from the 10th to the 90th percentile.

FIGURE 40. OCCUPATIONS BY SKILL LEVEL, 2017
INCLUDES NEW AND REPLACEMENT JOBS

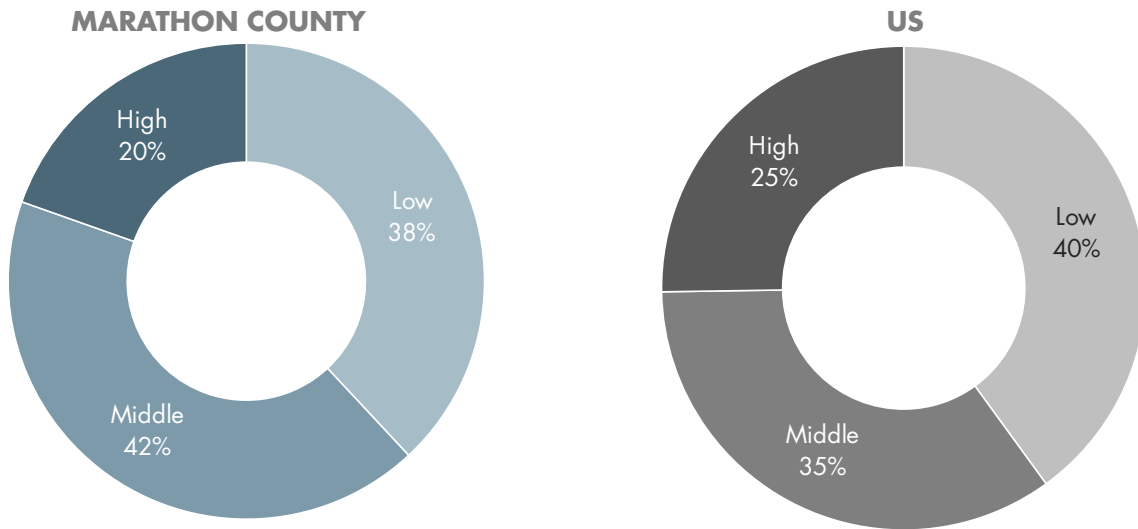
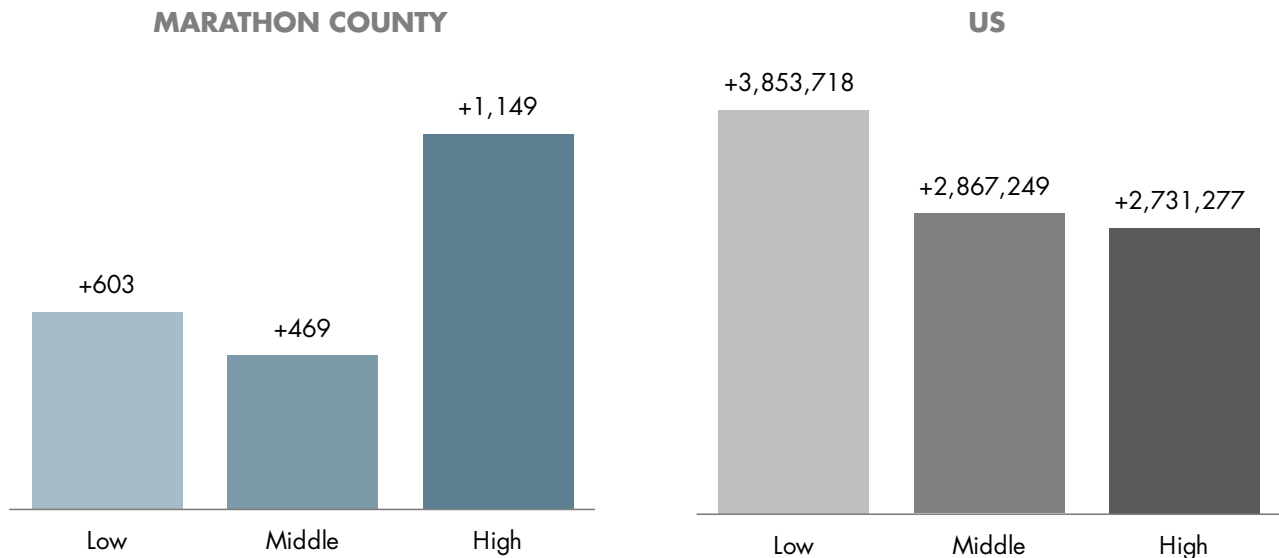


FIGURE 41. OCCUPATIONAL CHANGES BY SKILL LEVEL, 2017-2022
INCLUDES NEW AND REPLACEMENT JOBS



Source: (all figures) EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.

FIGURE 42. MARATHON COUNTY VS. WAUSAU CSA OCCUPATIONAL STRENGTHS
TOP LQS

SOC CODE	DESCRIPTION	Marathon County				Wausau CSA			
		2017 Jobs	2017 LQ	Median Hourly Earnings	Wage Premium over US Avg.	2017 Jobs	2017 LQ	Median Hourly Earnings	Wage Premium over US Avg.
51-2021	Coil Winders, Tapers, & Finishers	70	10.28	\$13.93	0.85	76	5.06	\$14.07	0.86
51-9021	Crushing, Grinding, & Polishing Machine	128	8.63	\$25.16	1.52	158	4.84	\$23.42	1.42
51-3023	Slaughterers & Meat Packers	340	8.46	\$13.16	1.03	367	4.15	\$12.98	1.01
51-4193	Plating & Coating Machine, Metal/Plastic	124	7.37	\$17.31	1.15	144	3.88	\$17.19	1.14
51-9121	Coating, Painting, & Spraying Machine Workers	302	7.17	\$15.92	1.01	425	4.58	\$16.15	1.03
51-3092	Food Batchmakers	502	6.83	\$17.54	1.31	987	6.10	\$17.38	1.30
51-2023	Electromechanical Equipment Assemblers	143	6.34	\$19.98	1.25	222	4.47	\$18.24	1.14
51-9196	Paper Goods Machine Workers	272	6.12	\$24.29	1.37	1,039	10.62	\$21.35	1.20
51-7099	Woodworkers, All Other	44	6.04	\$14.03	0.96	64	4.00	\$14.24	0.98
51-4031	Cutting, Punching, & Press Machine, Metal/Plastic	546	5.98	\$18.37	1.18	689	3.42	\$18.26	1.17
51-9051	Furnace, Kiln, Oven, Drier, & Kettle Workers	53	5.61	\$14.23	0.82	87	4.16	\$14.04	0.81
51-2041	Structural Metal Fabricators & Fitters	190	5.10	\$20.80	1.15	322	3.92	\$20.91	1.15
47-2132	Insulation Workers, Mechanical	67	4.93	\$33.40	1.53	71	2.37	\$33.06	1.52
51-4081	Multiple Machine Tool Workers, Metal/Plastic	278	4.87	\$20.36	1.23	395	3.14	\$19.46	1.17
29-2053	Psychiatric Technicians	151	4.80	\$14.86	1.00	164	2.36	\$14.72	0.99
51-4011	CNC Machine Operators, Metal/Plastic	334	4.71	\$21.22	1.17	545	3.48	\$20.25	1.11
51-3091	Food & Tobacco Machine Workers	47	4.69	\$10.87	0.79	126	5.69	\$10.97	0.80
51-7041	Sawing Machine Workers, Wood	118	4.62	\$14.57	1.06	208	3.70	\$14.94	1.09
51-9195	Molders, Shapers, & Casters, Except Metal/Plastic	100	4.62	\$14.12	0.93	124	2.60	\$14.73	0.97
51-9031	Electrical and Electromechanical Assemblers	33	4.60	\$14.92	1.12	47	3.01	\$14.11	1.06
51-4012	CNC Machine Programmers, Metal/Plastic	54	4.33	\$18.07	0.74	75	2.72	\$19.80	0.81
51-7042	Woodworking Machine, Except Sawing	158	4.28	\$15.51	1.13	519	6.36	\$15.22	1.11
51-9023	Mixing & Blending Machine Workers	269	4.22	\$21.90	1.28	411	2.92	\$20.59	1.20
13-1075	Labor Relations Specialists	156	4.16	\$8.84	0.30	308	3.72	\$8.93	0.30
11-9013	Farmers, Ranchers, & Other Agricultural Mgrs.	915	4.07	\$13.49	0.89	2,884	5.81	\$12.74	0.84
51-4051	Metal-Refining Furnace Workers	33	3.98	\$17.98	0.91	46	2.53	\$17.70	0.90
51-2022	Electrical & Electronic Equip. Assemblers	381	3.66	\$13.58	0.90	412	1.80	\$13.69	0.91
49-3041	Farm Equip. Mechanics & Service Technicians	65	3.60	\$16.02	0.89	125	3.14	\$17.28	0.96
51-4191	Heat Treating Equip. Workers, Metal/Plastic	34	3.58	\$17.54	0.98	37	1.78	\$17.54	0.98
51-8013	Power Plant Operators	60	3.54	\$33.89	0.94	68	1.82	\$33.70	0.94

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed.
Highlights: Wage premium = 10% or higher than US wages

FIGURE 43. MARATHON COUNTY DEMAND FACTORS BY SKILL LEVEL
 ESTIMATED ANNUAL OPENINGS (THROUGH 2022) WITH ESTIMATE OF NET CHANGE

SOC CODE	DESCRIPTION	2017 Jobs	DEMAND FACTORS				
			Projected Openings (2017-2022)	Net Job Change (2017-2022)	Wage Premium over US	% 55-64 Years	% 65+ Years
LOW-SKILL (<i>High school or less</i>)							
43-9061	Office Clerks, General	2,332	1,371	7	0.99	22% ◀	8%
41-2031	Retail Salespersons	1,831	1,304	-14	0.92	17%	9%
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	1,903	1,288	-5	1.28	15%	4%
39-9021	Personal Care Aides	1,357	1,224	202	1.02	17%	7%
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	1,320	932	66	0.95	22% ◀	9%
53-7064	Packers & Packagers, Hand	679	501	-19	1.63	17%	5%
43-4171	Receptionists & Information Clerks	547	423	53	1.00	19%	7%
37-2012	Maids & Housekeepers	561	366	-2	0.92	20% ◀	6%
53-3033	Light Truck or Delivery Services Drivers	622	339	9	0.99	22% ◀ 11% ◀	
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	525	335	45	0.92	25% ◀ 10% ◀	
37-3011	Landscaping & Groundskeeping Workers	384	256	22	0.99	20% ◀	8%
53-7051	Industrial Truck & Tractor Operators	433	235	-13	1.11	18%	2%
39-9031	Fitness Trainers & Aerobics Instructors	108	164	54	0.77	13%	5%
53-3022	Bus Drivers, School or Special Client	232	140	2	1.01	34% ◀ 29% ◀	
33-9032	Security Guards	227	140	-27	0.86	19%	11% ◀
53-3041	Taxi Drivers & Chauffeurs	150	98	18	0.91	22% ◀ 30% ◀	
53-3031	Driver/Sales Workers	161	92	6	1.57	21% ◀	9%
39-3091	Amusement & Recreation Attendants	60	91	15	0.85	11%	14% ◀
51-7042	Woodworking Machine, Except Sawing	158	82	-13	1.13	19%	2%
25-3021	Teachers, Self-Enrichment Educ.	131	81	8	1.09	21% ◀ 14% ◀	
MIDDLE-SKILL (<i>More than high school, less than four years</i>)							
53-3032	Heavy & Tractor-Trailer Truck Drivers	1,634	839	-80	0.92	25% ◀	9%
43-3031	Bookkeeping, Accounting, & Auditing Clerks	1,176	649	-17	0.88	26% ◀	9%
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	1,065	563	24	0.96	23% ◀	5%
43-1011	First-Line Supvrs., Office & Admin. Support	817	444	39	0.88	23% ◀	4%
49-9071	Maintenance & Repair Workers, General	836	437	28	1.14	26% ◀	6%
51-1011	First-Line Supvrs., Production & Operating Workers	846	409	-7	0.85	23% ◀	3%
31-9092	Medical Assistants	530	380	82	1.10	12%	1%
51-3092	Food Batchmakers	502	355	5	1.31	20% ◀	3%
11-9013	Farmers, Ranchers, & Other Agricultural Mgrs.	915	321	-99	0.89	35% ◀ 16% ◀	
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	506	307	5	1.09	25% ◀	4%

Continued, next page

FIGURE 43. MARATHON COUNTY DEMAND FACTORS BY SKILL LEVEL (CONTINUED)
ESTIMATED ANNUAL OPENINGS (THROUGH 2022) WITH ESTIMATE OF NET CHANGE

SOC CODE	DESCRIPTION	2017 Jobs	DEMAND FACTORS				
			Projected Openings (2017-2022)	Net Job Change (2017-2022)	Wage Premium over US	% 55-64 Years	% 65+ Years
LOW-SKILL (High school or less)							
51-4031	Cutting, Punching, & Press Machine, Metal/Plastic	546	301	-28	1.18	20% ◀	2%
41-1011	First-Line Supvrs., Retail Sales Workers	503	269	-1	0.97	20% ◀	5%
51-9111	Packaging & Filling Machine Workers	446	264	7	1.30	21% ◀	3%
51-2022	Electrical & Electronic Equip. Assemblers	381	214	-27	0.90	27% ◀	4%
51-4011	CNC Machine Operators, Metal/Plastic	334	199	29	1.17	17%	1%
49-9041	Industrial Machinery Mechanics	321	159	19	1.04	28% ◀	3%
51-4081	Multiple Machine Tool Workers, Metal/Plastic	278	156	6	1.23	20% ◀	2%
51-9023	Mixing & Blending Machine Workers	269	148	-7	1.28	23% ◀	2%
41-2022	Parts Salespersons	221	147	9	1.07	20% ◀	11% ◀
41-3021	Insurance Sales Agents	300	147	2	0.87	22% ◀	10% ◀
HIGH SKILL (Four-year degree or above)							
29-1141	Registered Nurses	1,491	471	88	0.92	24% ◀	3%
11-1021	General & Operations Managers	771	386	64	0.90	22% ◀	4%
13-2011	Accountants & Auditors	528	329	81	0.85	19%	5%
25-3098	Substitute Teachers	396	236	18	0.99	17%	10% ◀
11-9199	Managers, All Other	365	164	33	0.68	27% ◀	7%
25-2022	Teachers, Middle School (Exc. Special Ed. & CTE)	366	145	14	1.28	17%	4%
11-9111	Medical & Health Services Managers	265	130	25	0.94	30% ◀	4%
13-1199	Business Operations Specialists, All Other	187	126	35	0.76	21% ◀	4%
13-1111	Management Analysts	197	116	28	0.81	23% ◀	9%
13-1051	Cost Estimators	205	104	4	0.82	28% ◀	7%
13-1023	Purchasing Agents, Exc, Whls., Retail, & Farm	199	97	10	0.80	27% ◀	5%
17-2112	Industrial Engineers	230	79	4	0.80	24% ◀	3%
25-1099	Teachers, Postsecondary	211	78	-14	0.94	18%	12%
25-3099	Teachers & Instructors, All Other	125	72	4	0.94	18%	12%
13-1075	Labor Relations Specialists	156	69	-24	0.30	31% ◀	2%
11-3051	Industrial Production Managers	175	65	4	0.93	26% ◀	2%
21-1023	Mental Health & Substance Abuse Social Workers	102	65	11	1.07	21% ◀	4%
11-3011	Administrative Services Managers	118	59	10	0.98	29% ◀	5%
13-2052	Personal Financial Advisors	108	57	15	0.79	30% ◀	9%
23-1011	Lawyers	212	51	4	0.70	23% ◀	11% ◀

Source: EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Highlights: Wage premium = 10% or higher than US wages; %55-64 = 20% or higher; %65+ = 10% or higher;

FIGURE 44. REGIONAL INSTITUTIONS BY COMPLETIONS, 2016
WAUSAU CSA

INSTITUTION NAME	CITY	TYPE	2016 COMPLETIONS
Mid-State Technical College	Wisconsin Rapids	At least 2 but less than 4 years	876
Northcentral Technical College	Wausau	At least 2 but less than 4 years	2,270
Rasmussen College-Wausau Campus	Wausau	Four or more years	N/A*
University of Wisconsin-Stevens Point	Stevens Point	Four or more years	2,044

FIGURE 45. DISTRIBUTION OF FOR-CREDIT COMPLETIONS BY AWARD LEVEL, 2016
WAUSAU CSA

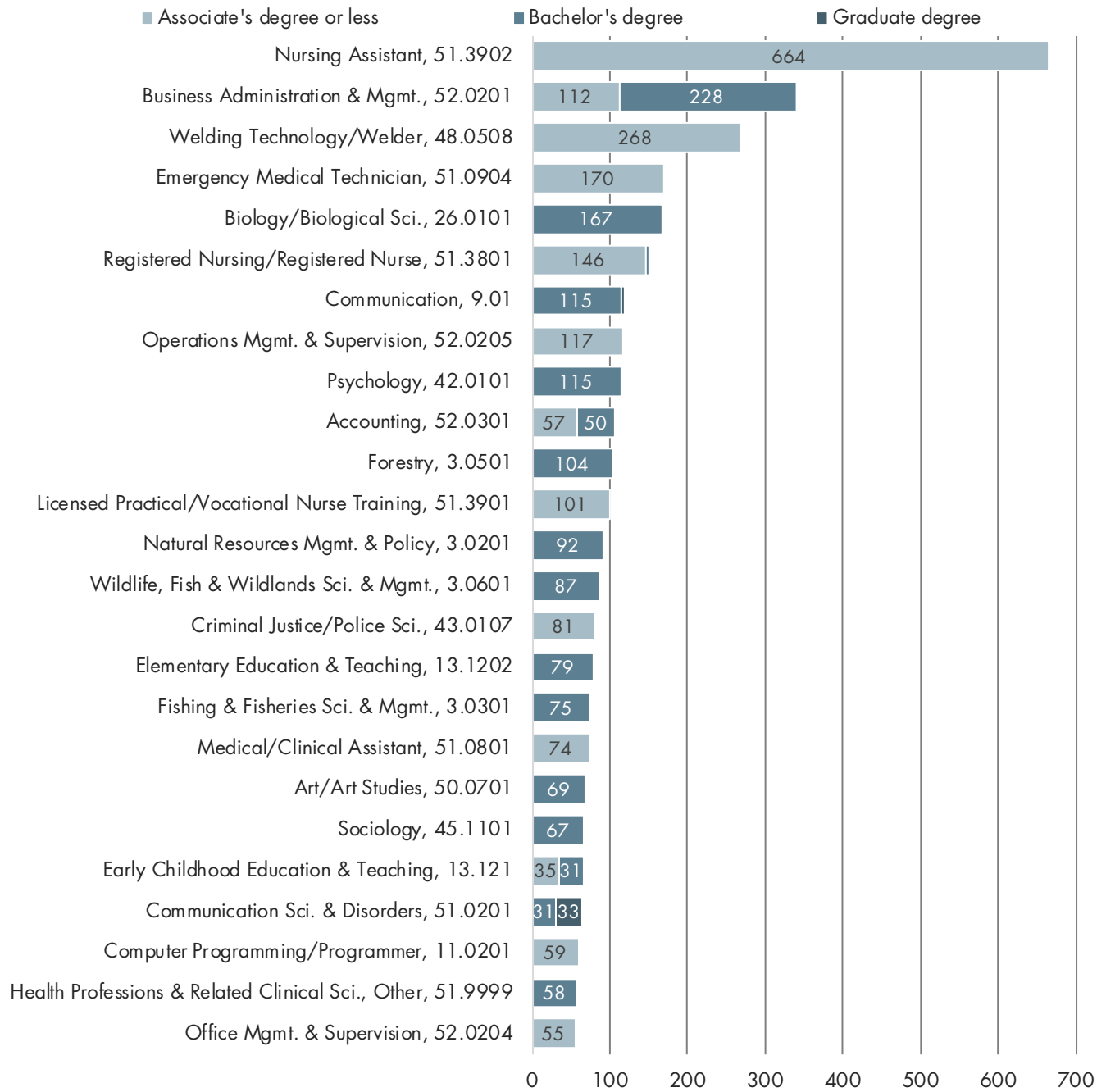


*Data not available for satellite campuses.

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS).

Notes: IPEDS data include only schools eligible to participate in federal financial aid programs.

FIGURE 46. LARGEST FIELDS OF STUDY RANKED BY COMPLETIONS, 2016
WAUSAU CSA



Source: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS).
Notes: IPEDS data include only schools eligible to participate in federal financial aid programs.

COMPETITIVE BENCHMARKING

FIGURE 47. POPULATION OVERVIEW, 2017

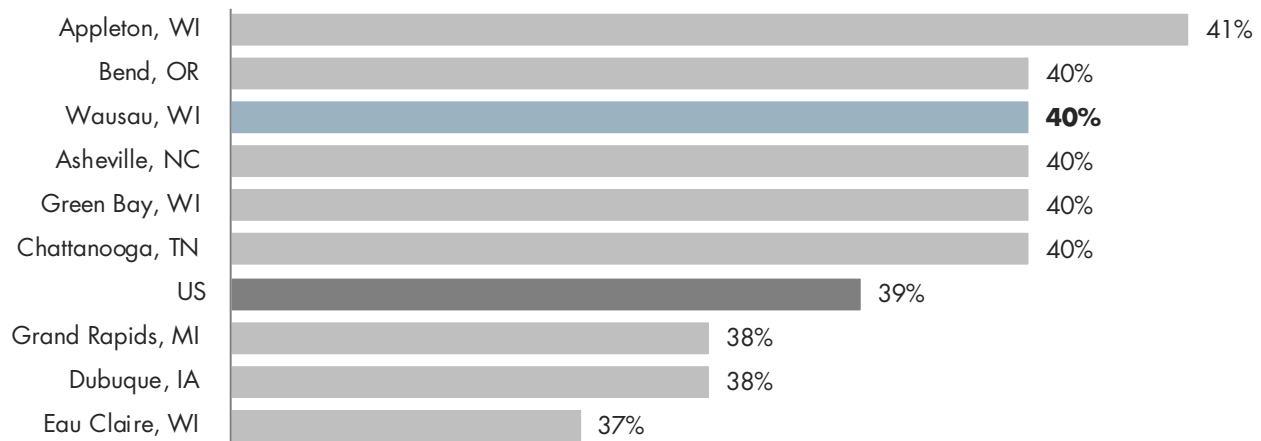
BENCHMARK METRO AREA	METRO POP.	CENTRAL CITY	CITY POP.
Appleton, WI	236,126	Appleton	74,653
Asheville, NC	456,145	Asheville	91,902
Bend-Redmond, OR	186,875	Bend	94,520
Chattanooga, TN-GA	556,548	Chattanooga	179,139
Dubuque, IA	97,041	Dubuque	58,276
Eau Claire, WI	167,484	Eau Claire	68,587
Grand Rapids-Wyoming, MI	1,059,113	Grand Rapids	198,829
Green Bay, WI	320,050	Green Bay	105,116
Wausau, WI	135,732	Wausau	38,739

FIGURE 48. MSA TOTAL POPULATION, 2010 AND 2017

Geography	2010	2017	Net Chg.	Percent Chg.
Bend, OR	157,733	186,875	29,142	+18.5%
Asheville, NC	424,858	456,145	31,287	+7.4%
Grand Rapids, MI	988,938	1,059,113	70,175	+7.1%
US	308,745,538	325,719,178	16,973,640	+5.5%
Chattanooga, TN	528,143	556,548	28,405	+5.4%
Appleton, WI	225,666	236,126	10,460	+4.6%
Green Bay, WI	306,241	320,050	13,809	+4.5%
Eau Claire, WI	161,151	167,484	6,333	+3.9%
Dubuque, IA	93,653	97,041	3,388	+3.6%
Wausau, WI	134,063	135,732	1,669	+1.2%

FIGURE 49. MSA PRIME WORKING AGE POPULATION

PERCENTAGE OF THE POPULATION AGE 35 TO 64 YEARS



Sources: (Figure 47) US Census Bureau, Population Estimates Program; (Figure 48) US Bureau of Labor Statistics, Current Population Survey (national figures) and Local Area Unemployment Statistics (state and local); (Figure 49) US Census, American Community Survey, 5-year averages for the period 2012-2016.

FIGURE 50. MSA EDUCATIONAL ATTAINMENT

POPULATION AGE 25 YEARS AND OLDER WITH A BACHELOR'S DEGREE OR HIGHER

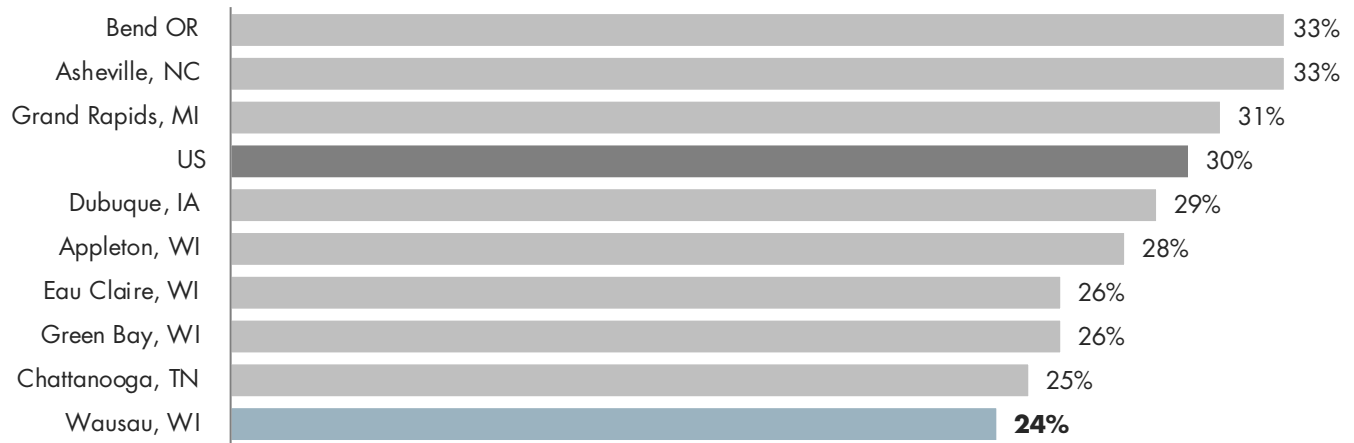


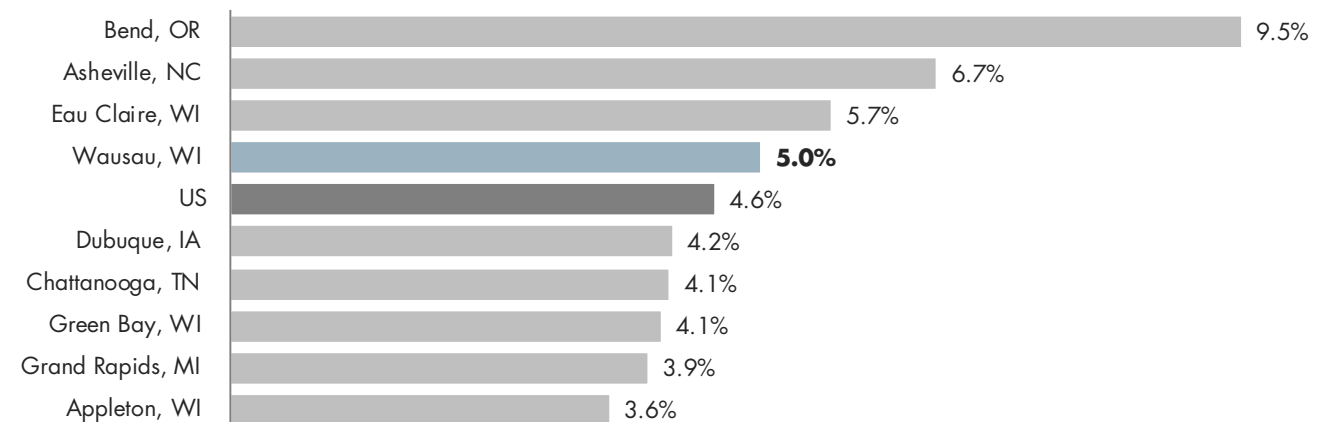
FIGURE 51. MSA HOUSING AFFORDABILITY

LOWER=MORE AFFORDABLE

Geography	Median Home Values	Median Household Income	Housing Affordability Index
Bend, OR	\$54,211	\$275,300	5.08
Asheville, NC	\$46,443	\$187,700	4.04
US	\$55,322	\$184,700	3.34
Chattanooga, TN	\$47,751	\$149,700	3.14
Eau Claire, WI	\$51,376	\$152,900	2.98
Green Bay, WI	\$54,361	\$159,100	2.93
Dubuque, IA	\$56,154	\$153,000	2.72
Wausau, WI	\$54,227	\$145,900	2.69
Grand Rapids, MI	\$55,675	\$146,300	2.63
Appleton, WI	\$61,840	\$159,200	2.57

FIGURE 52. MSA POPULATION WORKING AT HOME

PERCENT OF WORKERS AGE 16 YEARS AND OLDER



Sources: (Figure 50 and Figure 52) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016; (Figure 51) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016 & TIP calculation (Index).

FIGURE 53. MSA PERCENT OF POPULATION WITH HEALTH INSURANCE



FIGURE 54. MSA BUILDING PERMITS, 2010-2017

Geography	Total Permits 2010-2017	Population 2017 (in thousands)	Total Housing Permits per 1,000 Residents
Bend, OR	10,840	187	58.0
Asheville, NC	15,800	456	34.6
Dubuque, IA	2,832	97	29.2
Appleton, WI	6,625	236	28.1
Eau Claire, WI	4,453	167	26.6
Green Bay, WI	8,413	320	26.3
Chattanooga, TN	13,117	557	23.6
Grand Rapids, MI	23,414	1059	22.1
Wausau, WI	2,598	136	19.1

FIGURE 55. MSA BUILDING PERMITS, 2017

Geography	Share of Single-Family	Share of Multi-Family
Dubuque, IA	92%	8%
Bend, OR	86%	14%
Asheville, NC	77%	23%
Green Bay, WI	77%	23%
Eau Claire, WI	74%	26%
Chattanooga, TN	70%	30%
Appleton, WI	66%	34%
Grand Rapids, MI	61%	39%
Wausau, WI	48%	52%

Sources: (Figure 53) US Census Bureau, American Community Survey, 5-year averages for the period 2012-2016; (Figure 54 and Figure 55) SOCDs Building Permits Database, HUD.

FIGURE 56. MSA JOBS, 2010 AND 2017

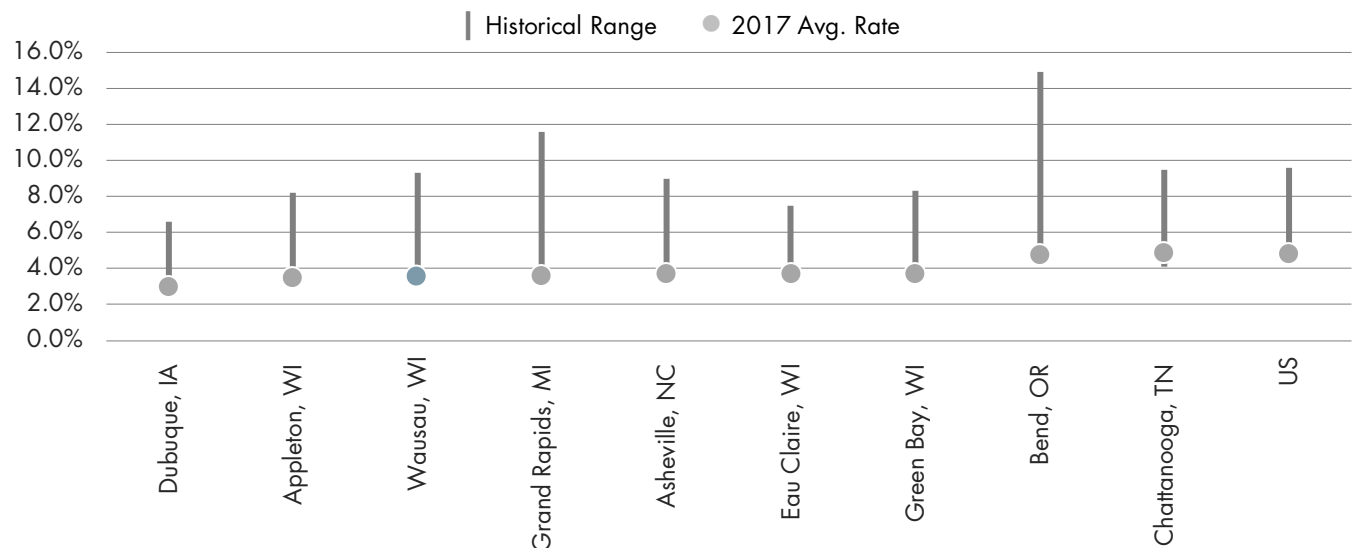
Geography	2010	2017	Net Chg.	Percent Chg.
Bend, OR	69,528	90,161	20,633	+29.7%
Grand Rapids, MI	478,288	594,687	116,399	+24.3%
Asheville, NC	188,039	212,714	24,674	+13.1%
Chattanooga, TN	244,016	268,362	24,346	+10.0%
Dubuque, IA	59,096	64,341	5,244	+8.9%
Appleton, WI	121,545	131,473	9,929	+8.2%
Eau Claire, WI	83,459	89,933	6,473	+7.8%
Wausau, WI	71,408	76,916	5,508	+7.7%
Green Bay, WI	174,323	186,396	12,073	+6.9%
US	308,745,538	325,719,178	16,973,640	+5.5%

FIGURE 57. MSA LABOR FORCE, 2010 AND 2017

Geography	2010	2017	Net Chg.	Percent Chg.
Bend, OR	81,238	93,470	12,232	+15.1%
Grand Rapids, MI	513,987	571,703	57,716	+11.2%
Asheville, NC	208,969	229,164	20,195	+9.7%
US	153,885,250	160,320,000	6,434,750	+4.2%
Appleton, WI	127,901	132,768	4,867	+3.8%
Green Bay, WI	169,662	175,423	5,761	+3.4%
Chattanooga, TN	258,363	266,949	8,586	+3.3%
Eau Claire, WI	90,291	93,186	2,895	+3.2%
Wausau, WI	73,521	74,325	804	+1.1%
Dubuque, IA	54,224	54,459	235	+0.4%

FIGURE 58. MSA HISTORICAL RANGE AND CURRENT UNEMPLOYMENT RATE

HISTORICAL RANGE = 2007 TO PRESENT YEAR

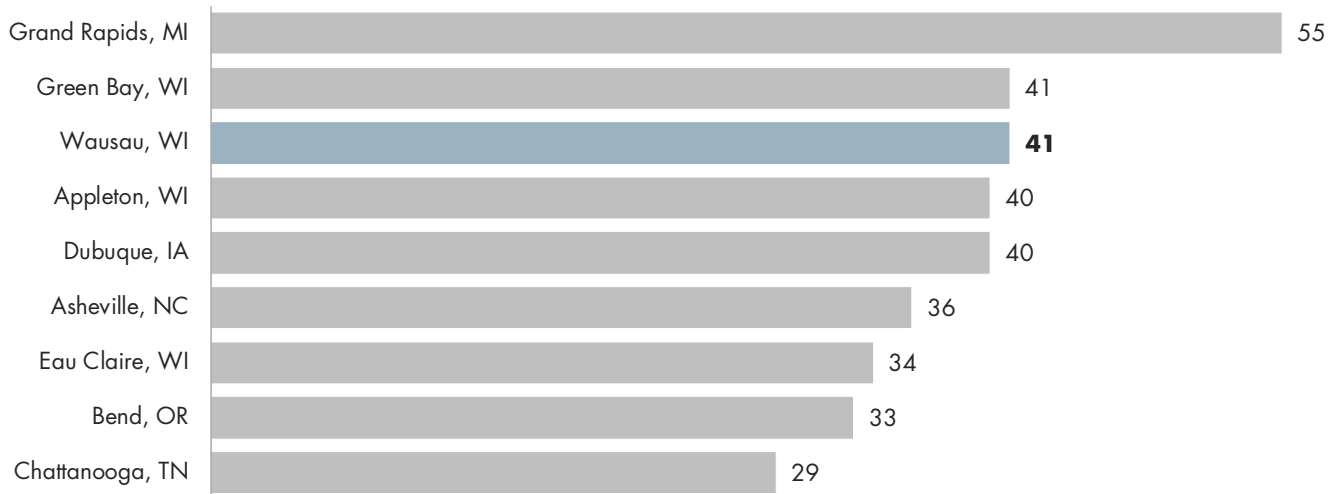


Sources: (Figure 56) Emsi, 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; and (Figure 57 and Figure 58) US Bureau of Labor Statistics, Current Population Survey (national figures) and Local Area Unemployment Statistics (state and local).

FIGURE 59. MSA AVERAGE ANNUAL WAGES, 2010 AND 2017

Geography	2010	2017	Net Chg.	Percent Chg.
Bend, OR	\$35,242	\$44,196	\$8,954	+25.4%
Eau Claire, WI	\$34,914	\$42,554	\$7,640	+21.9%
Wausau, WI	\$36,940	\$44,681	\$7,741	+21.0%
Dubuque, IA	\$36,906	\$44,191	\$7,285	+19.7%
Appleton, WI	\$38,178	\$45,650	\$7,472	+19.6%
Chattanooga, TN	\$39,564	\$46,697	\$7,133	+18.0%
Green Bay, WI	\$40,145	\$46,931	\$6,786	+16.9%
Asheville, NC	\$34,789	\$40,516	\$5,727	+16.5%
Grand Rapids, MI	\$40,657	\$47,004	\$6,347	+15.6%

FIGURE 60. CENTRAL CITY WALK SCORE



Sources: (Figure 59) US Bureau of Labor Statistics, Quarterly Census of Employment and Wages; and (Figure 60) WalkScore.com.

APPENDIX 3. TARGET INDUSTRY ANALYSIS

In identifying target sectors, our team examined detailed data to identify which industries are well-established in the region, how they performed in recent years, and how they are expected to perform in the near term. For this analysis we looked at factors including

- strategic assets;
- existing initiatives;
- critical mass;
- competitive advantage;
- growth prospects, and
- cross-sector synergies.

In the first phase of this project — the economic assessment — we reviewed employment using standard NAICS industry classifications. For the targeting analysis, we take this a step further by filtering employment within an industry “cluster” framework developed by the US Economic Development Administration in conjunction with the Institute for Strategy and Competitiveness at Harvard Business School.

In addition, an analysis of capital investments relies on categories defined by fDi Markets, an operating subsidiary of the Financial Times. Next, the analysis of entrepreneurial investment relies on categories of venture capital investment defined by PricewaterhouseCoopers.

THE TARGETING APPROACH

QUANTITATIVE

What do the data tell us?



QUALITATIVE

What have we learned about the region’s assets and challenges?



STRATEGIC

What trends, relationships, etc. will influence opportunities going forward?

RESULTS

- Manufacturing
- Healthcare
- Agriculture & Food Processing
- Tourism & Outdoor Recreation
- IT & Business Services

THE TARGETING PROCESS



FIGURE 61. MARATHON COUNTY STRATEGIC ASSETS

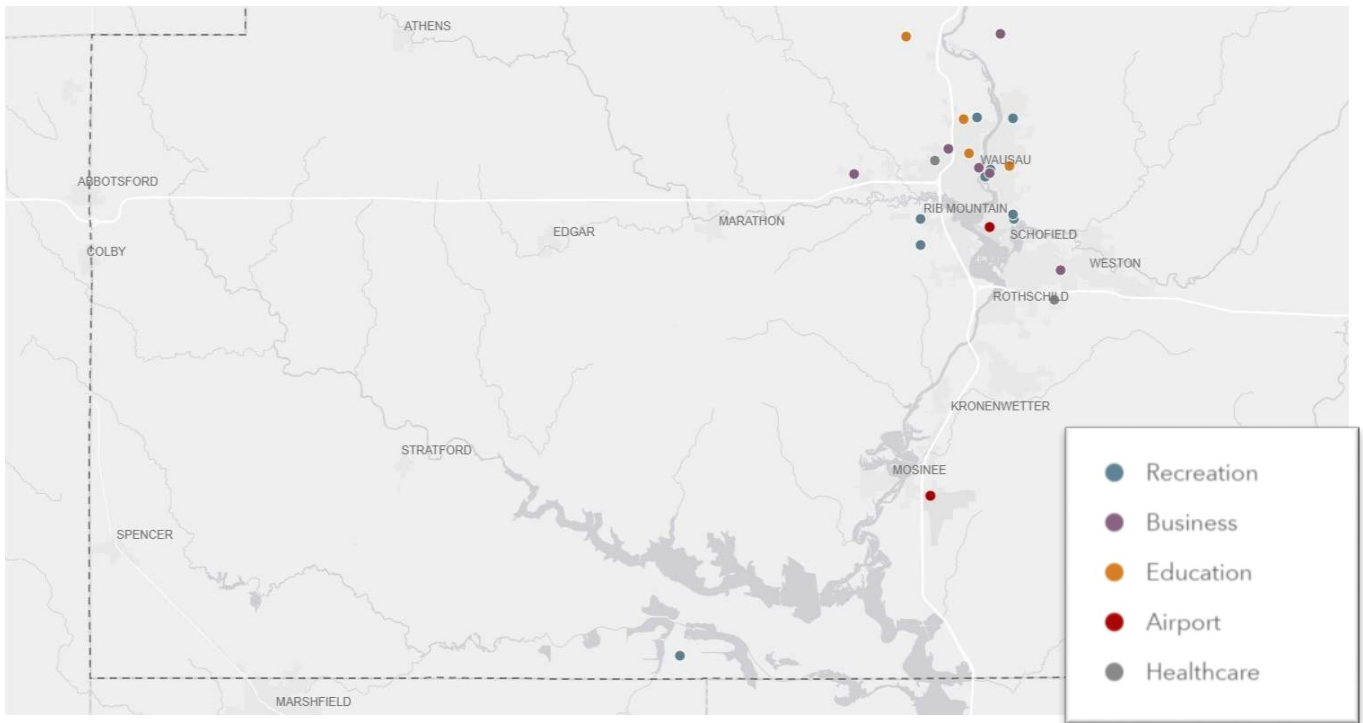
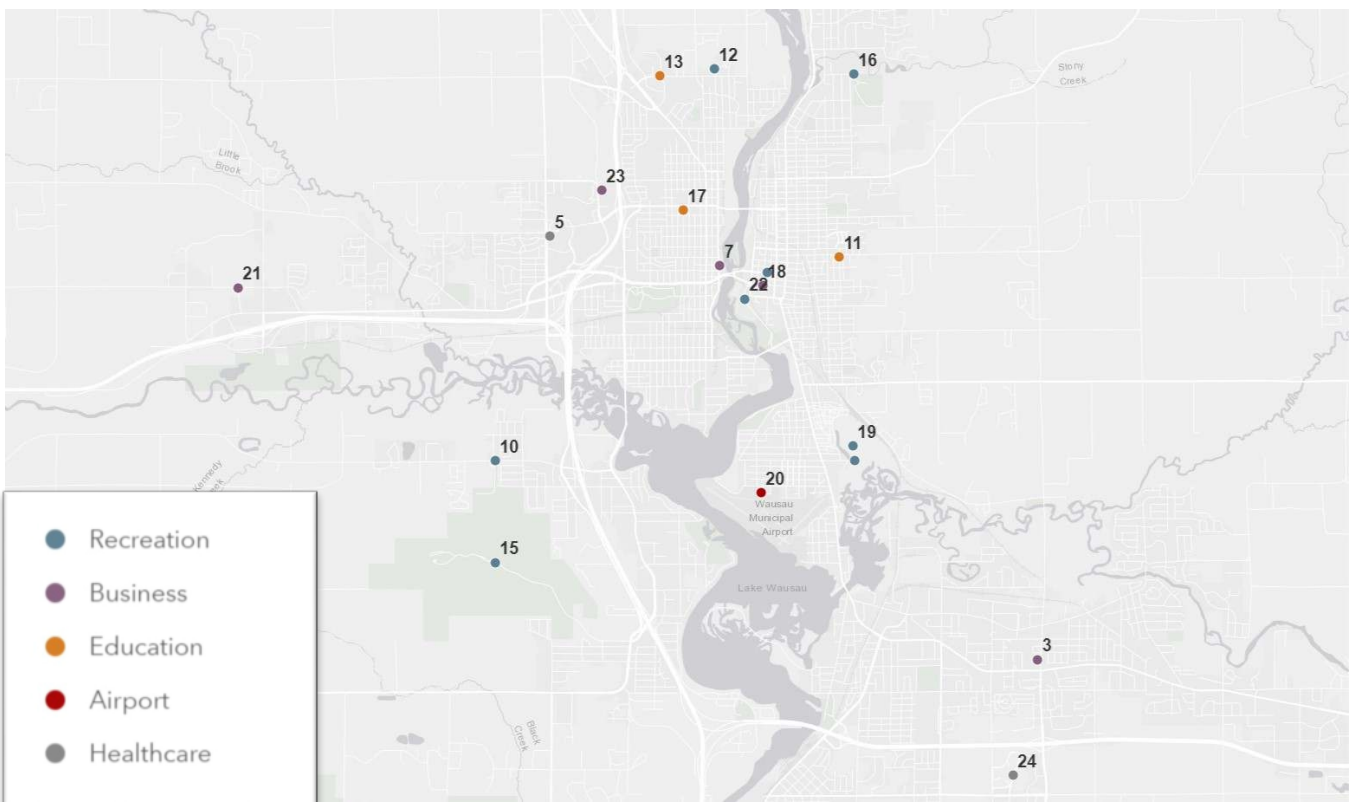


FIGURE 62. MARATHON COUNTY STRATEGIC ASSETS DETAILED VIEW*



Source: TIP Strategies, Esri ArcGIS.

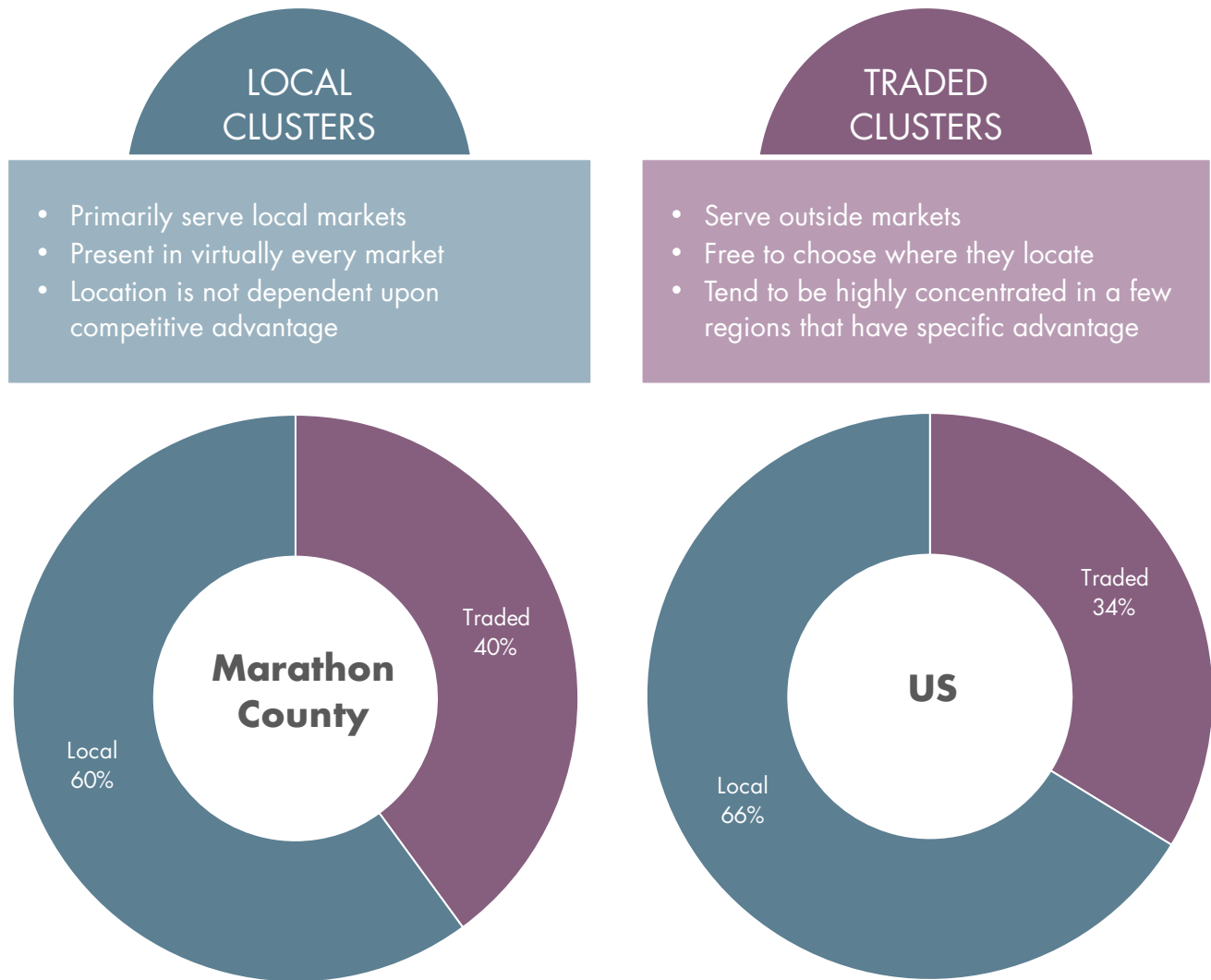
*Not all assets visible at this scale. See table for complete list.

FIGURE 62. MARATHON COUNTY STRATEGIC ASSETS DETAILED VIEW – CONT'D

	ASSET	CITY	STATE	TYPE
1	George W. Mead State Wildlife Area	Milladore	WI	Recreation
2	Central Wisconsin Airport	Mosinee	WI	Airport
3	Greenheck	Schofield	WI	Business
4	University of Wisconsin–Stevens Point	Stevens Point	WI	Education
5	Aspirus Medical District	Wausau	WI	Healthcare
6	Downtown Wausau River District	Wausau	WI	Recreation
7	Eastbay Retail Store	Wausau	WI	Business
8	Eastbay Sports Complex	Wausau	WI	Recreation
9	Ginseng Company	Wausau	WI	Business
10	Granite Peak Ski Resort	Wausau	WI	Recreation
11	Leigh Yawkey Woodson Art Museum	Wausau	WI	Education
12	Monk Botanical Gardens	Wausau	WI	Recreation
13	Northcentral Technical College	Wausau	WI	Education
14	NTC Agriculture Center of Excellence	Wausau	WI	Education
15	Rib Mountain State Park	Wausau	WI	Recreation
16	Sylvan Hill Park	Wausau	WI	Recreation
17	University of Wisconsin–Wausau	Wausau	WI	Education
18	Wausau Center Mall	Wausau	WI	Business
19	Wausau Curling Center	Wausau	WI	Recreation
20	Wausau Downtown Airport	Wausau	WI	Airport
21	Wausau West Business and Industrial Park	Wausau	WI	Business
22	Wausau Whitewater Park	Wausau	WI	Recreation
23	Westwood Conference Center	Wausau	WI	Business
24	Ascension St. Clare's Hospital	Weston	WI	Healthcare

Source: TIP Strategies, Esri ArcGIS.

FIGURE 63. EMPLOYMENT CLUSTERS: TRADED VS LOCAL
EMPLOYMENT IN 2017 BASED ON CLUSTER TYPE



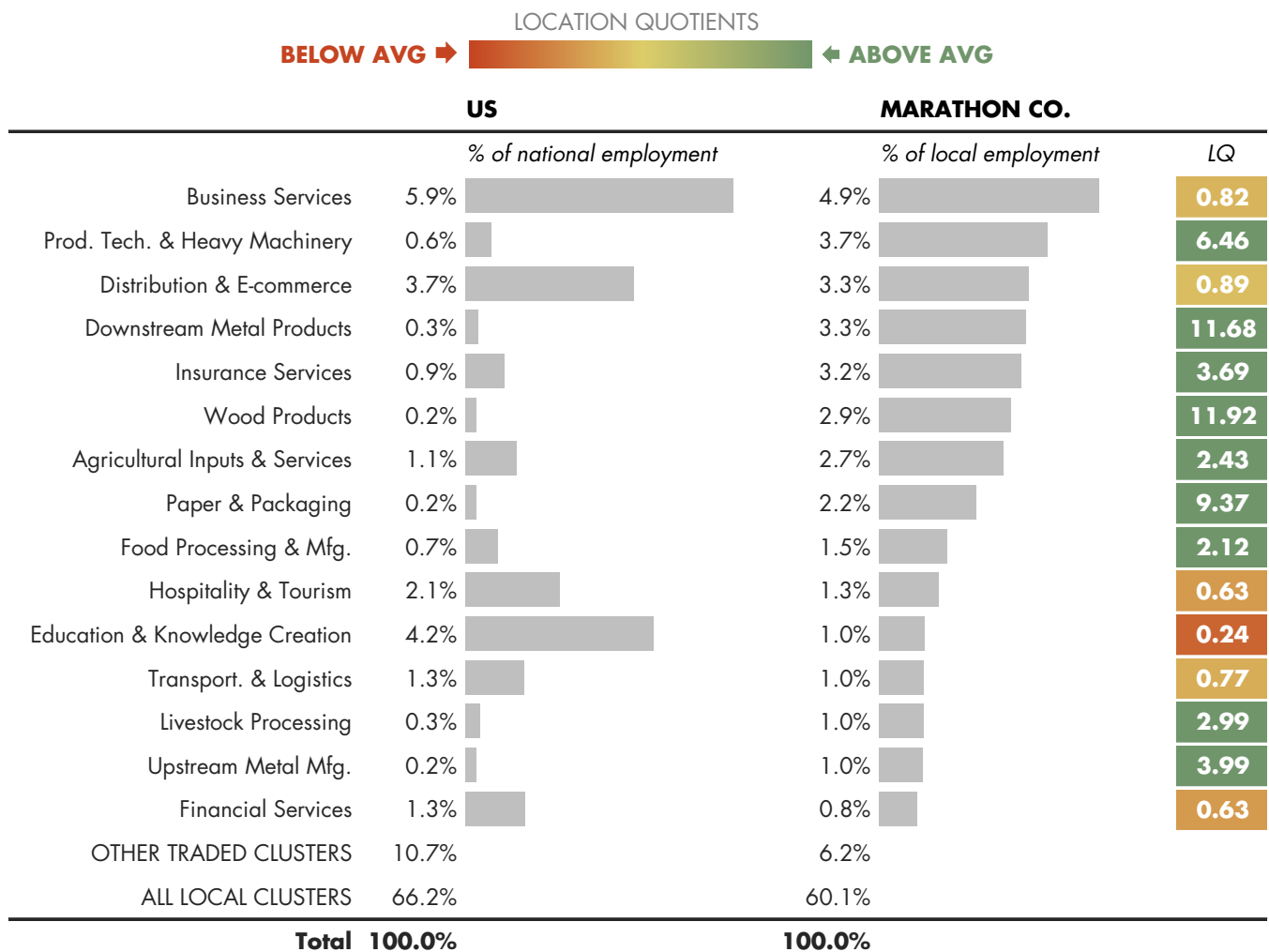
WHY IT MATTERS

Increasing the ratio of traded-to-local clusters is a common strategy for enhancing economic prosperity. “Traded” clusters are emphasized by economic developers because they include industries and firms that typically produce goods and services for customers beyond the local region. These traded activities are thus more likely to produce externally generated revenues which can, in turn, help boost local tax coffers. As an example, a dentist office might serve local customers exclusively, while a manufacturing plant, a data center, or a hotel would typically serve paying customers beyond the local area. The ability of traded clusters to serve larger markets also presents greater opportunity for employment growth, whereas a dentist office might face more finite geographic limits to expansion.

Sources: US Bureau of Labor Statistics; EMSI 2018.2– QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.

Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

FIGURE 64. EMPLOYMENT CLUSTERS: WEIGHT (SIZE & CONCENTRATION)
 TRADED CLUSTERS EMPLOYING THE MOST WORKERS LOCALLY IN 2017



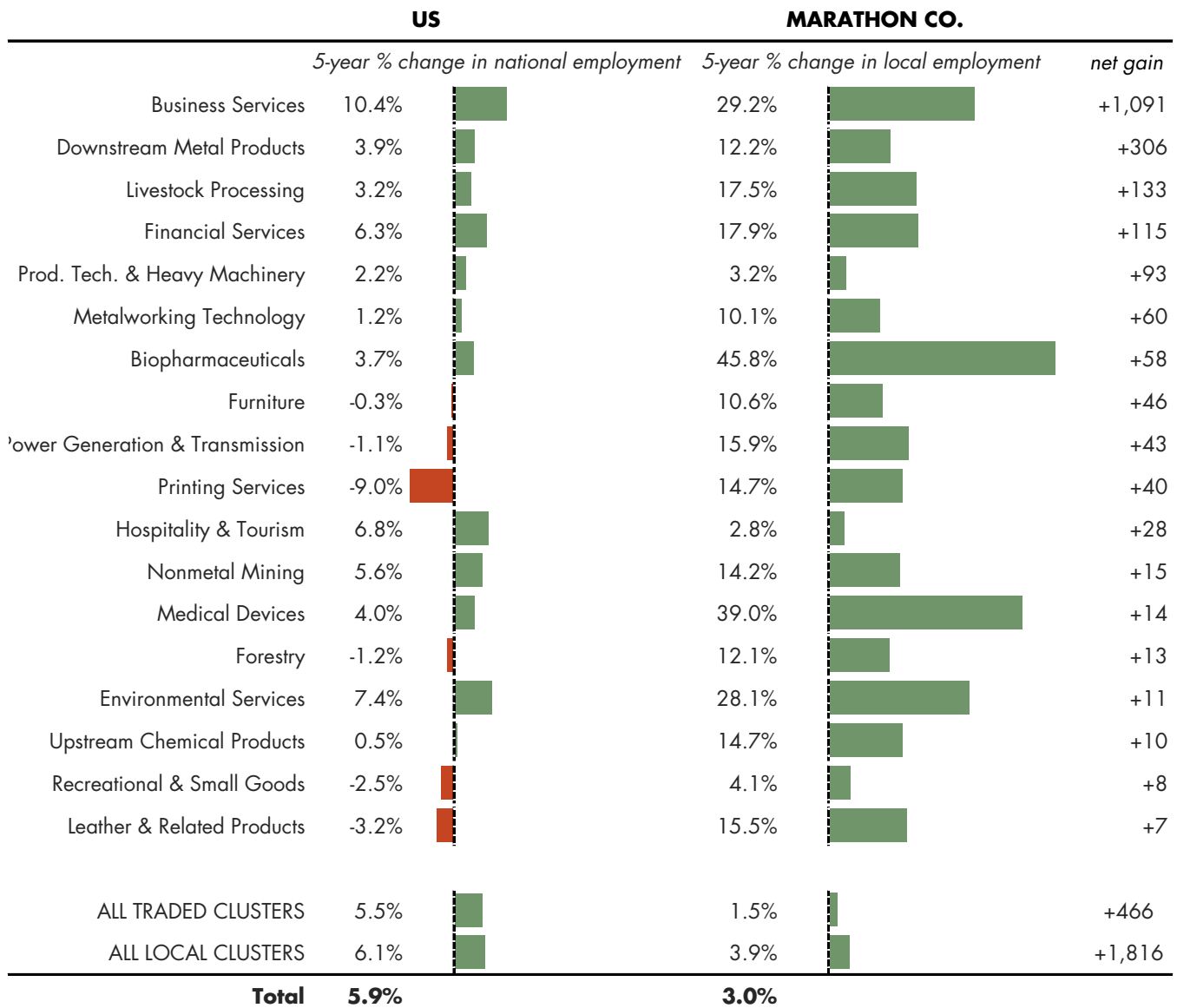
WHY IT MATTERS

While local clusters (such as dentist offices) typically account for a similar share of employment across communities of varying size, the share of total employment represented by traded clusters (such as automotive assembly plants) may differ dramatically from one community to the next. Traded clusters that account for a larger-than-average share of total employment can suggest areas of competitive advantage. This figure compares the distribution of employment by cluster in the US (first column) with the local area (second column). The third column uses location quotients (LQs) to convey the intensity of employment locally relative to the US. If a traded cluster represents 1% of US employment and 5% of local employment, its LQ would be 5.0, meaning that the traded cluster in the local area is five times as large as would be expected based on national patterns.

Sources: US Bureau of Labor Statistics; EMSI 2018.2– QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.

Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

FIGURE 65. EMPLOYMENT CLUSTERS: PROJECTED GROWTH
 TRADED CLUSTERS WITH THE HIGHEST PROJECTED LOCAL JOB GAINS, 2017-2022



WHY IT MATTERS

Understanding anticipated job growth in traded clusters is an essential element of the targeting process. This figure compares projected net job gains in percentage terms over a five-year horizon for the US (first column) and the local area (second column). The column on the far right shows projections (in numeric terms) for local net job gains in traded clusters in descending order. The last three rows of the exhibit—showing projected job growth aggregated for traded clusters, local clusters, and total employment—can help inform strategic discussions and refine goals for the future.

Sources: US Bureau of Labor Statistics; EMSI 2018.2– QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.

Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

FIGURE 66. TALENT DEMAND INDICATORS

ANALYSIS OF UNIQUE LOCAL JOB POSTINGS DURING CALENDAR YEAR 2017

INTENSITY OF JOB POSTINGS RELATIVE TO US



HIGH-DEMAND LOCAL OCCUPATIONS		HIGH-DEMAND LOCAL SKILLS	
	<i>location quotient</i>		<i>location quotient</i>
Laborers & Freight, Stock, & Material Movers, Hand	2.60	Equest	92.80
First-Line Supervisors of Production & Operating Workers	2.07	Wordpress	47.42
Nursing Assistants	2.03	Curtain Wall	6.15
Customer Service Representatives	1.76	Patient Electronic Medical Record	2.88
Sales Reps., Wholesale & Mfg., Except Tech. & Sci. Products	1.71	Pediatrics	2.29
Advertising Sales Agents	1.69	Medicaid	1.85
Light Truck or Delivery Services Drivers	1.68	Microsoft Office	1.84
Medical Assistants	1.65	Blueprints	1.68
Stock Clerks & Order Fillers	1.54	Material Handling	1.62
Combined Food Prep. & Serving Workers, Including Fast Food	1.53	Mathematics	1.54
Maintenance & Repair Workers, General	1.46	Forklifts	1.53
Registered Nurses	1.34	Critical Care	1.32
Social & Human Service Assistants	1.22	Preventive Maintenance	1.17
Retail Salespersons	1.21	Freight+	1.15
Heavy & Tractor-Trailer Truck Drivers	1.14	Tractor-Trailers	0.97
Medical & Health Services Managers	1.11	Food Preparation	0.96
First-Line Supervisors of Retail Sales Workers	1.05	Quality Control	0.86
First-Line Supervisors of Office & Admin. Support Workers	1.04	Technical Support	0.86
First-Line Supervisors of Food Prep. & Serving Workers	0.97	Quality Assurance	0.86
Computer User Support Specialists	0.92	Bilingual	0.60

WHY IT MATTERS

An analysis of job postings can help reframe our understanding of the local job market from the employer’s perspective rather than simply through the lens of government statistics. This back-of-the-envelope analysis uses job postings from the prior calendar year to identify the most sought-out occupations (first column) and the most frequently occurring words and phrases (second column). LQs are used to approximate the local intensity of recruiting efforts and illustrate employer demand for specific “hard skills.” A help wanted ad that appears locally at five times the relative rate as the US would have an LQ of 5.0; likewise, a specific skill that appears more frequently in local postings than the national average would have an LQ greater than 1.0, suggesting higher demand in the local market. The results should prompt strategic questions about the alignment of the region’s talent pipeline with the needs of employers and with target (traded) clusters.

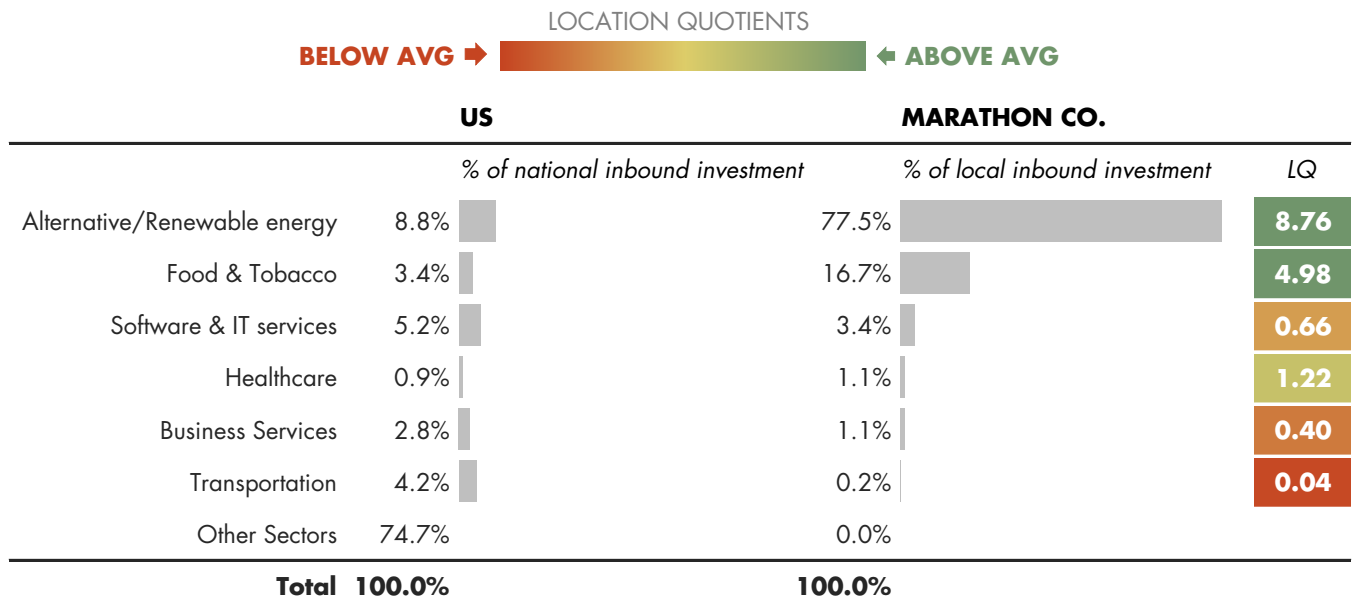
Source: Gartner TalentNeuron.

FIGURE 67. LEADING LOCAL JOB RECRUITERS IN TRADED SECTORS OF THE ECONOMY
 ANALYSIS OF UNIQUE LOCAL JOB POSTINGS IN MARATHON CO. DURING CALENDAR YEAR 2017

	Aspirus System
	Ascension Health
	UnitedHealth Group
	Marshfield Clinic
	Foot Locker
	Mills Fleet Farm
	Eastbay, Inc.
	UPS
	Greenheck Fan Corporation
	Bone and Joint Center, S.C.
	Tender Reflections Assisted Living
	Northcentral Technical College
	Kwik Trip
	Deluxe Corporation
	Best Version Media
	West Corporation
	North Central Health Care
	The Delta Companies
	Aqua Finance Inc
	Aurora Services

Source: Gartner TalentNeuron.

FIGURE 68. INBOUND FIXED CAPITAL INVESTMENT
FOREIGN AND OUT-OF-STATE INVESTMENT 2008-2017



WHY IT MATTERS

Industry analysis often focuses heavily, sometimes exclusively, on employment patterns. For a fuller understanding of local industry trends, a review of capital investment flows is useful. This figure compares the distribution (in percentage terms) of inbound investment by industry at the national and local levels. The first column shows cross-state and foreign investment in the US. The second column shows inbound investment into the local area from companies based out-of-state (including foreign investment), sorted in descending order. The column on the far right uses LQs to convey the intensity of capital investment in these sectors locally relative to the US. While the cluster definitions differ slightly from the EDA framework, the concepts are similar.

Sources: fDi Markets, TIP Strategies.

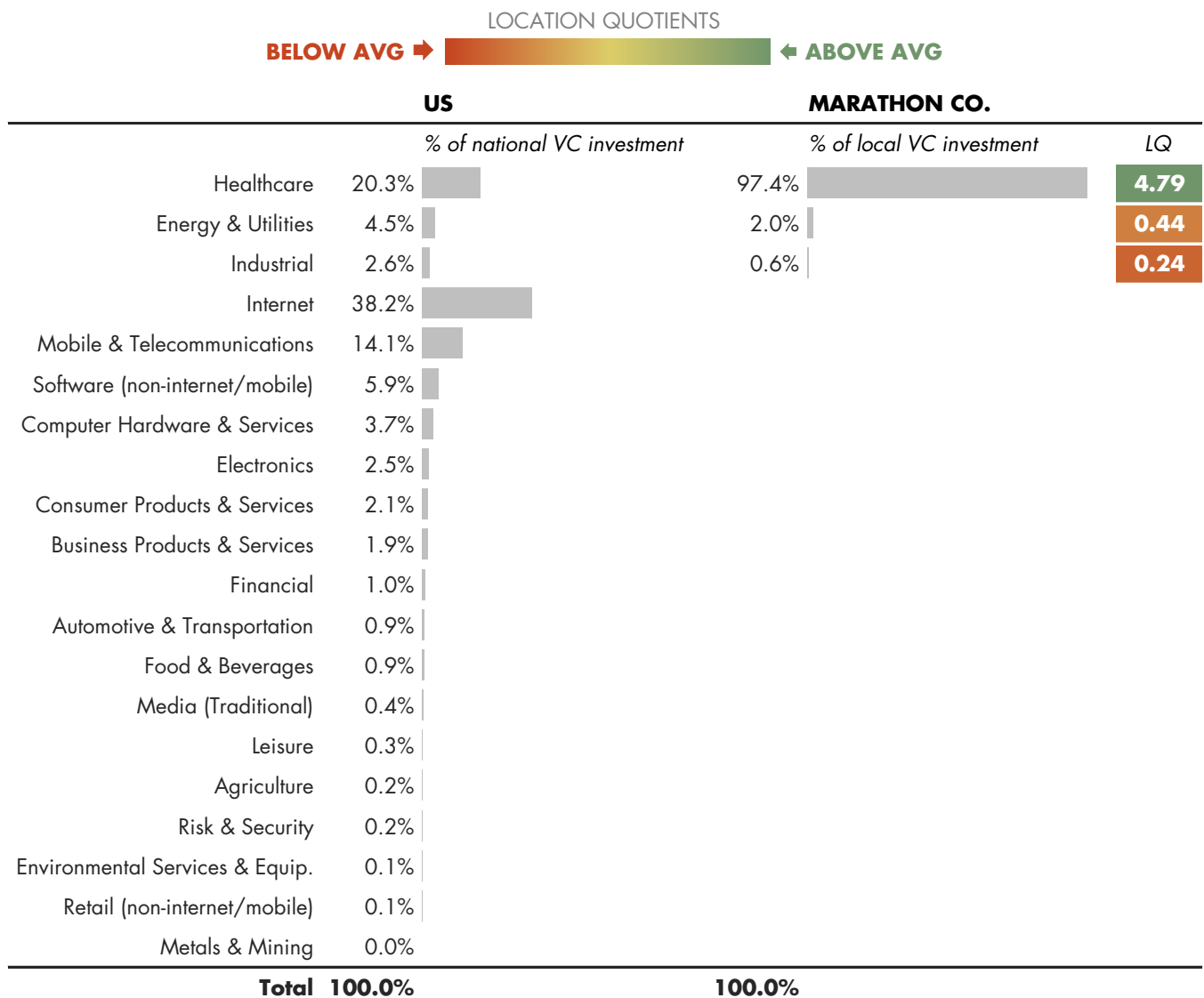
FIGURE 69. INBOUND FIXED CAPITAL INVESTMENT

FOREIGN AND OUT-OF-STATE INVESTMENT 2008-2017 MADE IN LOCAL FIRMS BASED IN MARATHON CO.

COMPANY	SUB-SECTOR	INVESTMENT (\$MIL)	HQ CITY	LAST ACTIVITY
Great Lakes Cheese	Dairy products	\$55.0	Portage County, OH	7/1/2017
BioLife Plasma Services	Outpatient care centers & medical & diagnostic labs	\$3.6	Lake County, IL	9/1/2014
West Business Services	Business support services	\$0.6	Douglas County, NE	2/1/2012
West Business Services	Business support services	\$1.5	Douglas County, NE	12/1/2011
Collaborative Consulting	Custom computer programming services	\$11.3	Middlesex County, MA	11/1/2011
Old Dominion Freight Line	Freight/Distribution Services	\$0.6	Davidson County, NC	10/1/2011
Domtar Corporation	Biomass power	\$255.0	Not specified	6/1/2011
West Asset Management	Business support services	\$1.5	Douglas County, NE	3/1/2010

Sources: fDi Markets, TIP Strategies.

FIGURE 70. ENTREPRENEURIAL INVESTMENT (CITY OF WAUSAU)
 VENTURE CAPITAL INVESTMENTS IN WAUSAU TRACKED BY TECHNOLOGY SECTOR, 2008-2017



WHY IT MATTERS

Venture capital (VC) investment is highly concentrated, with funding disproportionately flowing to large metropolitan areas and robust college towns. Despite this fact, a review of local investment patterns can be instructive even if activity has been scant. This figure catalogs the distribution of these entrepreneurial investments by industry over the past 10 years at the national level (first column) and locally (second column). US data are sourced from PricewaterhouseCoopers (PwC), while local investment activity is sourced from Crunchbase and aligned to the extent possible with PwC’s technology categories (which differ from the EDA framework used elsewhere). The far-right column shows the relative intensity of VC activity by technology category using LQs. The fewer VC investments over the past 10 years, the more skewed the results are likely to be. Consequently, this analysis should be interpreted with caution.

Sources: PricewaterhouseCoopers, Crunchbase, TIP Strategies.
 Note: LQs of three digits or higher are displayed as 99.99.

FIGURE 71. ENTREPRENEURIAL INVESTMENT (CITY OF WAUSAU)
 LEADING VENTURE EQUITY RECIPIENTS IN MARATHON CO. DURING THE 2008-2017 PERIOD





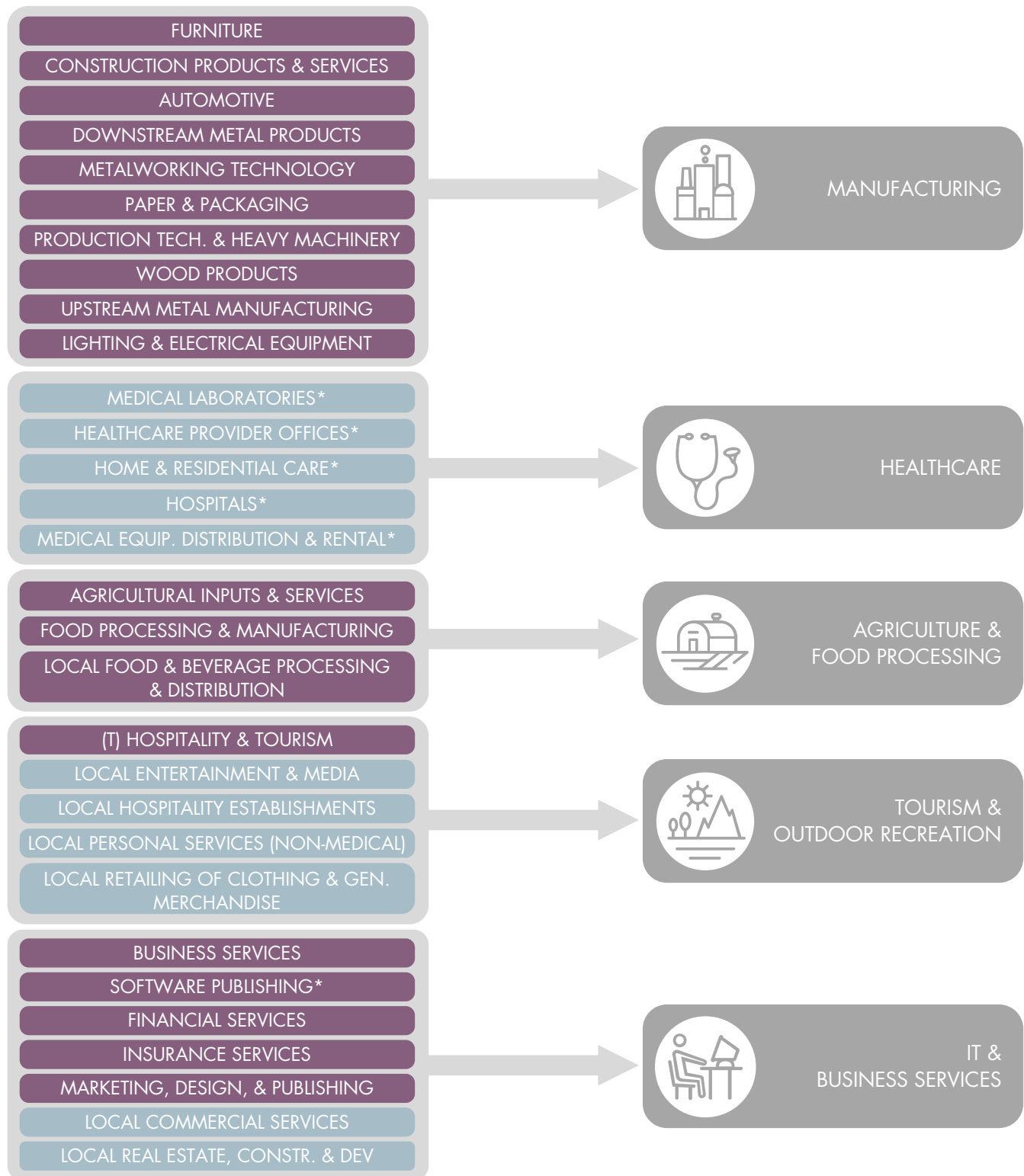
	COMPANY	CUMULATIVE VC	DESCRIPTION	SECTOR
	UAS Laboratories	\$21,249,221	UAS Labs is a global leader in probiotic innovation.	Healthcare
	Align	\$2,000,000	Align develops innovative solutions that address emerging challenges in your organization's day-to-day operations.	Healthcare
	PDM Solar	\$470,900	PDM Solar is developing vapor compression air conditioners and heat pumps that are powered by heat rather than by electricity.	Energy & Utilities
	FreMarq Innovations	\$150,000	FreMarq Innovations is a curtain wall systems manufacturer for commercial window design industry.	Industrial

FIGURE 72. TARGETING FRAMEWORK

TRADED and **LOCAL** clusters and subclusters emerge from the analysis...

...to provide a foundation for **TARGET SECTORS**



*Indicates a subcluster.

Sources: US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.

MANUFACTURING

In recent decades, the term “advanced manufacturing” has been applied to describe certain technologically driven aspects of the industry. This “traditional” vs. “advanced” manufacturing distinction was especially popular during the early phases of computer and electronics manufacturing in the 1960s to 1980s when there were notable differences between tech manufacturing and other types of production. However, the continued spread of technology and innovation across all industries has virtually erased this distinction. Today, all manufacturing requires more technology than in previous decades, both in terms of the skills demanded of workers and of the sophistication needed in the software and hardware that power production processes.

Wisconsin’s workforce is more concentrated in manufacturing jobs (16 percent of all jobs in the state) than any state in the US except for Indiana. Marathon County’s economy is even more dependent on manufacturing than the state as a whole. The Wausau region has a long, rich history of manufacturing excellence. Marathon County has competitive advantages in several manufacturing sub-sectors, ranging from paper products and downstream metals to construction materials and HVAC products to supply the commercial construction industry. Not only does the region have lots of manufacturing plants, many of the largest manufacturers are headquartered in Marathon County, including Greenheck, County Materials Corp., Marathon Cheese, Crystal Finishing Systems, Wausau Window and Wall, and Linetec.

MARKET OPPORTUNITIES	WAUSAU’S ADVANTAGES
<ul style="list-style-type: none"> Wisconsin has the second highest level of manufacturing employment in the US (16 percent of the state’s total employment, second only to Indiana). Foxconn’s \$10 billion manufacturing complex in Racine County plus the technology centers in Green Bay, Eau Claire, and UW-Madison provide supplier and service provider recruitment opportunities. Growing global demand for US-made products, along with rising transportation costs and increased demand for “just-in-time” supply chain management. 	<ul style="list-style-type: none"> Very high concentration of jobs in manufacturing (LQ of 2.71) in Marathon County. High local concentration of production workers (LQs above 2.0) in numerous key occupations. Transportation infrastructure (IH-39 and US Highway 29, CN railroad). Central Wisconsin Metal Manufacturers Alliance (CWIMMA). Major local manufacturing plants, plus several corporate HQs of manufacturers based locally.

KEY FOCUS AREAS

NAICS CODE	DESCRIPTION
332312	Fabricated Structural Metal Manufacturing
332510	Hardware Manufacturing
333413	Ind. & Comm. Fan, Blower & Air Purification Mfg.
332321	Metal Window and Door Manufacturing
321911	Wood Window and Door Manufacturing
322121	Paper (except Newsprint) Mills
332812	Metal Coating & Engraving
321918	Other Millwork (including Flooring)
332999	All Other Misc. Fabricated Metal Product Mfg.
333241	Food Product Machinery Mfg.
322212	Folding Paperboard Box Manufacturing
331318	Other Aluminum Rolling, Drawing, and Extruding

TARGET SNAPSHOT

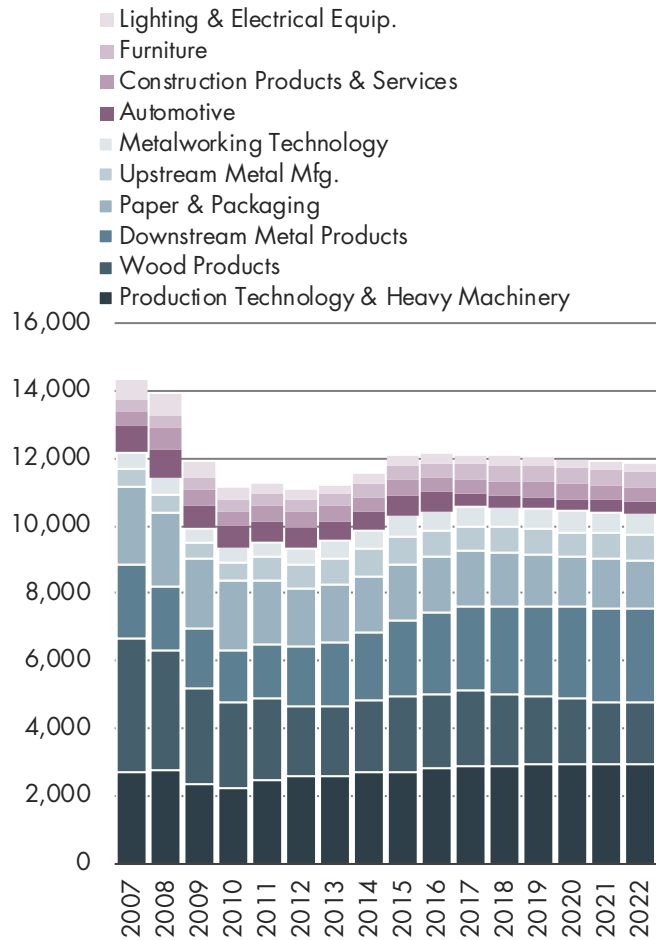
MARATHON COUNTY	TOTAL	TARGET
2017 Payrolled Business Locations	3,437	154
2017 Employment	76,916	12,098
Net Chg., 2007-2017	-1,520	-2,246
Pct. Chg., 2007-2017	-1.9%	-15.7%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+201,381
Pct. Chg., 2017-2022	+5.9%	+3.6%
MARATHON COUNTY	TOTAL	TARGET
Net Chg., 2017-2022	+2,210	-274
Pct. Chg., 2017-2022	+2.9%	-2.3%

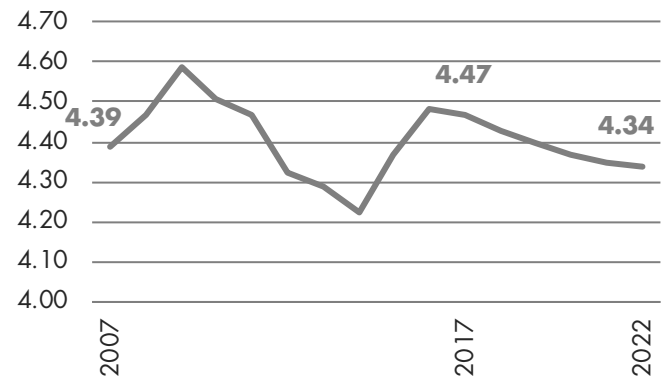
TARGET COMPONENTS

ANNUAL EMPLOYMENT



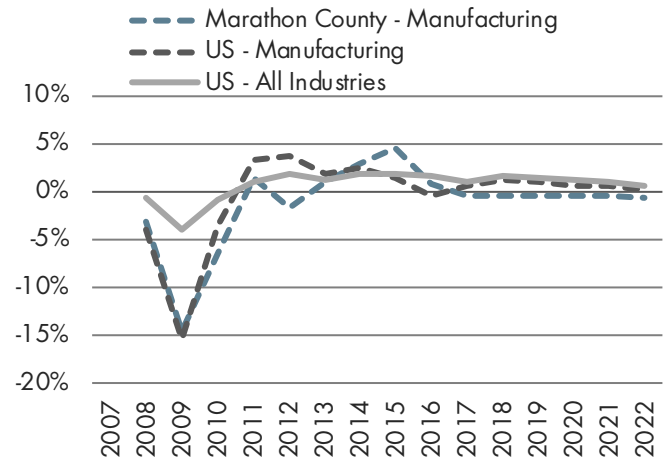
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TARGET STAFFING PROFILE
MARATHON COUNTY

LQs & RELATIVE EARNINGS: **BELOW AVG** →  ← **ABOVE AVG**

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2017 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
51-2098	Assemblers & Fabricators, All Other	968	8.0%	0.72	15.22	1.03
51-1011	First-Line Supvrs., Production & Operating Workers	568	4.7%	1.34	24.75	0.88
51-4121	Welders, Cutters, Solderers, & Brazers	562	4.6%	1.45	19.57	1.03
51-4031	Cutting, Punching, & Press Machine, Metal/Plastic	518	4.3%	2.10	18.20	1.14
51-2028	Electrical & Electronic Equip. Assemblers	461	3.8%	2.40	13.67	0.87
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	399	3.3%	1.30	16.15	1.23
51-4011	CNC Machine Operators, Metal/Plastic	303	2.5%	1.76	21.48	1.14
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	290	2.4%	1.04	20.23	1.11
51-9198	Helpers–Production Workers	278	2.3%	1.28	13.18	1.05
51-9196	Paper Goods Machine Workers	260	2.1%	1.51	22.07	1.21
51-9111	Packaging & Filling Machine Workers	258	2.1%	4.93	17.83	1.26
51-7042	Woodworking Machine, Except Sawing	255	2.1%	1.70	14.68	1.05
51-4081	Multiple Machine Tool Workers, Metal/Plastic	250	2.1%	1.71	20.91	1.24
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	228	1.9%	1.05	25.15	0.94
51-9121	Coating, Painting, & Spraying Machine Workers	226	1.9%	1.85	17.53	1.09
51-2041	Structural Metal Fabricators & Fitters	207	1.7%	2.28	21.50	1.16
49-9071	Maintenance & Repair Workers, General	207	1.7%	1.18	19.85	1.10
49-9041	Industrial Machinery Mechanics	205	1.7%	1.22	26.17	1.07
43-9061	Office Clerks, General	192	1.6%	1.16	15.09	0.99
51-7011	Cabinetmakers & Bench Carpenters	188	1.5%	1.04	14.54	0.90
51-4041	Machinists	184	1.5%	0.52	20.70	1.01
51-4193	Plating & Coating Machine, Metal/Plastic	149	1.2%	2.37	14.27	0.93
53-7051	Industrial Truck & Tractor Operators	147	1.2%	1.01	19.71	1.22
17-2141	Mechanical Engineers	141	1.2%	0.85	30.30	0.74
43-5071	Shipping, Receiving, & Traffic Clerks	136	1.1%	0.80	16.57	1.08

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

OCCUPATIONAL GROUP DETAIL: MARATHON COUNTY

51-2000 ASSEMBLERS AND FABRICATORS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 51-2098: Assemblers & Fabricators, All Other • 51-2028: Electrical & Electronic Equip. Assemblers 	<ul style="list-style-type: none"> • Curtain wall • WordPress • Tape measures • Blueprints • eQuest • Load testers • Jib cranes • Trolleys • Preventive maintenance • Dial calipers 	<ul style="list-style-type: none"> • Driver's License • American Society of Mechanical Engineers • Commercial Driver's License • DOT Medical card
51-1000 SUPERVISORS OF PRODUCTION WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 51-1011: First-Line Supvrs., Production & Operating Workers 	<ul style="list-style-type: none"> • Quality control • Microsoft Office • Enterprise Resource Planning Software • Quality Assurance • Lean Manufacturing • current Good Manufacturing Practice • Hazard analysis and critical control points • Ear plugs • Good Manufacturing Practice • Curtain wall 	<ul style="list-style-type: none"> • Food safety programs • Safe Quality Food • Material Handling Equipment • Occupational Safety & Health Administration Certification • Driver's License • Global Food Safety Initiative Certification • Laboratory Quality Management System certification • HAZMAT • Continuing Education • First Aid certification
51-4000 METAL & PLASTIC WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 51-4121: Welders, Cutters, Solderers, & Brazers • 51-4031: Cutting, Punching, & Press Machine, Metal/Plastic • 51-4011: CNC Machine Operators, Metal/Plastic • 51-4081: Multiple Machine Tool Workers, Metal/Plastic • 51-4041: Machinists • 51-4193: Plating & Coating Machine, Metal/Plastic 	<ul style="list-style-type: none"> • Blueprints • Curtain wall • Micrometers • Tape measures • Computer numerical control software • Milling machines • Cutting equipment • Preventive maintenance 	<ul style="list-style-type: none"> • SANS Certified • Driver's License

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed; Gartner TalentNeuron.

EDUCATION PIPELINE FOR OCCUPATIONAL GROUPS 49 (PRODUCTION) AND 51 (INSTALLATION, MAINTENANCE, & REPAIR)
MARATHON COUNTY

CIP CODE	PROGRAM	COMPLETIONS		
		2015	2016	2017
48.0508	Welding Technology/Welder	460	251	191
52.0205	Operations Management and Supervision	171	117	135
11.0201	Computer Programming/Programmer, General	37	38	43
15.0403	Electromechanical Technology/Electromechanical Engr. Tech.	16	17	29
47.0604	Automobile/Automotive Mechanics Technology/Technician	41	18	28
47.0605	Diesel Mechanics Technology/Technician	3	17	23
47.0499	Precision Systems Maintenance and Repair Technologies, Other	—	7	17
48.0507	Tool and Die Technology/Technician	56	19	16
48.0503	Machine Shop Technology/Assistant	47	32	14
48.0701	Woodworking, General	10	8	11
15.0614	Welding Engineering Technology/Technician	—	—	10
47.0303	Industrial Mechanics and Maintenance Technology	8	17	10
01.0205	Agricultural Mechanics and Equipment/Machine Technology	5	8	7
47.0199	Electrical/Electronics Maintenance and Repair Technology, Other	3	—	4
48.0702	Furniture Design and Manufacturing	7	8	4
15.0404	Instrumentation Technology/Technician	10	—	1
10.0303	Prepress/Desktop Publishing and Digital Imaging Design	—	—	—
10.0305	Graphic and Printing Equipment Operator, General Production	—	—	—
46.0302	Electrician	7	—	—
47.0103	Communications Systems Installation and Repair Technology	—	—	—
47.0105	Industrial Electronics Technology/Technician	2	1	—
47.0201	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	12	17	—
47.0603	Autobody/Collision and Repair Technology/Technician	3	3	—
48.0501	Machine Tool Technology/Machinist	—	—	—
48.0506	Sheet Metal Technology/Sheetworking	—	—	—
51.2312	Assistive/Augmentative Technology and Rehabilitation Engr.	—	—	—

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed); US Department of Education’s National Center for Education Statistics, IPEDS accessed via EMSI.

HEALTHCARE

After manufacturing, healthcare is the second largest industry in Marathon County, with just over 10,000 jobs as of 2017. Aspirus is the largest single employer in Marathon County and Ascension Saint Clare’s Hospital and the Marshfield Clinic rank among the largest employers in the region as well. In addition to its size, healthcare is one of the most dynamic sectors of the local economy in recent years, adding more than 1,200 jobs in Marathon County between 2008 and 2017, second only to corporate HQs. The Wausau region’s central location in Wisconsin, combined with the area’s role as a regional hub for retail and services, could be leveraged to position the region as a major center for healthcare services.

MARKET OPPORTUNITIES	WAUSAU’S ADVANTAGES
<ul style="list-style-type: none"> Continued growth of healthcare in US economy. Projected growth of 10 percent in Marathon County’s healthcare sector over the next 5 years. Recruitment and development of medical specialties to serve Central and Northern Wisconsin and the Upper Peninsula of Michigan. Growth of a mixed-use medical district centered on the Aspirus Wausau Hospital. Demand for health information management (HIM) within large and small healthcare organizations. Proximity to Epic Systems in Madison (one of the world’s largest HIM companies) and UnitedHealth Group in Minneapolis (the largest US healthcare company; ranked #5 in the Fortune 500) provides opportunities for satellite facilities, suppliers, and related firms to support these major corporations. 	<ul style="list-style-type: none"> Aspirus is the largest employer in Marathon County and largest hospital system in Central Wisconsin and the Upper Peninsula of Michigan. Other large healthcare organizations including Ascension Saint Clare’s Hospital and the Marshfield Clinic. Relatively low LQ for healthcare sector employment (0.97) in Marathon County indicates unmet demand for local healthcare, especially for medical specialties that local residents travel to larger metros like Madison to access that do not currently exist in the Wausau region. Wausau region’s central location in Wisconsin and its role as a regional services center for a large geographic region extending northward into the Upper Peninsula of Michigan.

KEY FOCUS AREAS

NAICS CODE	DESCRIPTION
622110	General Medical and Surgical Hospitals
621111	Offices of Physicians (except Mental Health)
621491	HMO Medical Centers
903622	Hospitals (Local Government)
621210	Offices of Dentists
623110	Nursing Care Facilities (Skilled Nursing Facilities)
621492	Kidney Dialysis Centers
623210	Residential Intellectual & Dev. Disability Facilities
623990	Other Residential Care Facilities
621493	Detached Ambulatory Surgical & Emergency Ctrs
621320	Offices of Optometrists
623312	Assisted Living Facilities for the Elderly

TARGET SNAPSHOT

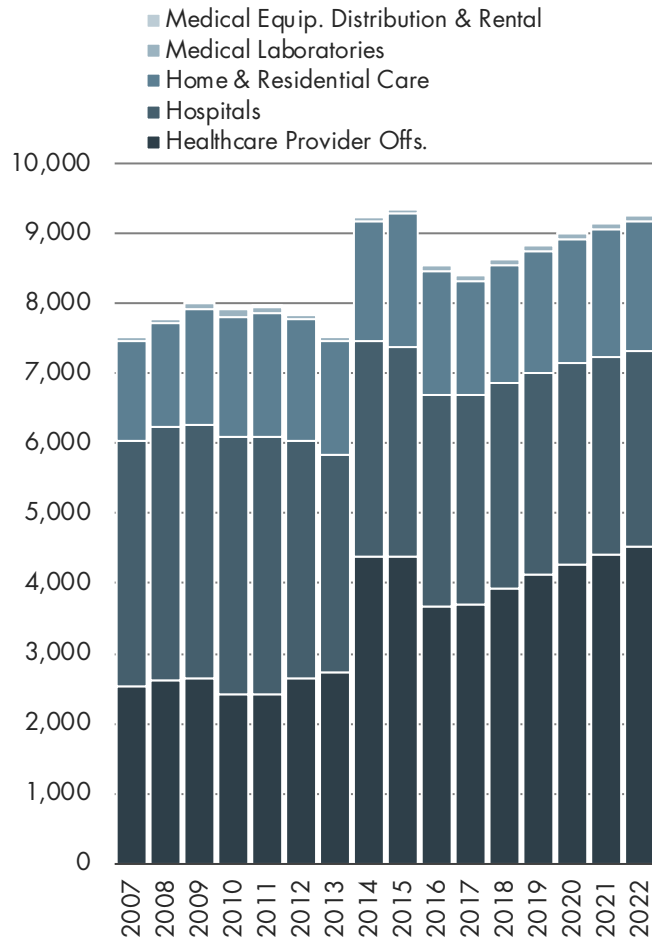
MARATHON COUNTY	TOTAL	TARGET
2017 Payrolled Business Locations	3,437	251
2017 Employment	76,916	8,409
Net Chg., 2007-2017	-1,520	+877
Pct. Chg., 2007-2017	-1.9%	+11.6%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,999,603
Pct. Chg., 2017-2022	+5.9%	+11.8%
MARATHON COUNTY	TOTAL	TARGET
Net Chg., 2017-2022	+2,210	+861
Pct. Chg., 2017-2022	+2.9%	+10.2%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



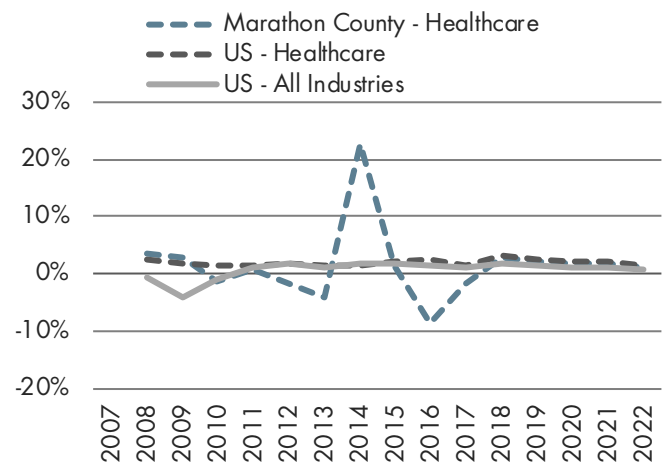
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TARGET STAFFING PROFILE
MARATHON COUNTY

LQs & RELATIVE EARNINGS: **BELOW AVG** →  ← **ABOVE AVG**

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2017 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
29-1141	Registered Nurses	1,312	15.3%	1.04	30.68	0.91
31-1014	Nursing Assistants	728	8.5%	1.12	13.15	0.99
31-9092	Medical Assistants	484	5.6%	1.51	17.32	1.11
39-9021	Personal Care Aides	438	5.1%	1.12	11.00	1.00
43-4171	Receptionists & Information Clerks	312	3.6%	1.36	13.25	0.97
43-9061	Office Clerks, General	267	3.1%	1.80	15.09	0.99
29-2053	Psychiatric Technicians	230	2.7%	7.95	16.44	1.08
29-2021	Dental Hygienists	205	2.4%	1.90	30.10	0.84
11-9111	Medical & Health Services Managers	193	2.2%	1.38	45.37	0.98
29-2034	Radiologic Technologists	193	2.2%	2.01	26.13	0.93
31-9091	Dental Assistants	183	2.1%	1.14	18.33	1.01
43-1011	First-Line Supvrs., Office & Admin. Support	123	1.4%	1.16	23.48	0.89
37-2012	Maids & Housekeepers	110	1.3%	0.94	9.36	0.90
29-2041	Emergency Medical Techs. & Paramedics	109	1.3%	4.13	16.88	1.05
29-2061	Licensed Practical/Vocational Nurses	109	1.3%	0.36	20.67	0.96
29-1123	Physical Therapists	107	1.2%	1.00	41.75	1.01
29-2055	Surgical Technologists	101	1.2%	1.94	24.66	1.11
43-3021	Billing & Posting Clerks	98	1.1%	0.99	18.91	1.06
31-9097	Phlebotomists	91	1.1%	1.57	15.22	0.94
43-4051	Customer Service Representatives	90	1.0%	1.23	14.35	0.90
29-2032	Diagnostic Medical Sonographers	87	1.0%	2.22	36.20	1.05
43-6013	Medical Secretaries	85	1.0%	0.32	17.14	1.03
29-2071	Medical Records & Health Info. Technicians	83	1.0%	1.15	17.52	0.93
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	81	0.9%	1.39	11.33	0.93
29-2018	Clinical Laboratory Technologists and Technicians	74	0.9%	0.51	28.59	0.95

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

OCCUPATIONAL GROUP DETAIL: MARATHON COUNTY

29-1000 HEALTH DIAGNOSING & TREATING PRACTITIONERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 29-1141: Registered Nurses • 29-1123: Physical Therapists 	<ul style="list-style-type: none"> • Pediatrics • Critical care • Patient Electronic Medical Record • Geriatrics • Medical-Surgical Nursing • Epic software • Emergency room • Trauma care • Medicaid • Medical information 	<ul style="list-style-type: none"> • Certified Registered Nurse • Certification in CPR • Basic Life Support • Pediatric Advanced Life Support • Driver's License • Advanced Cardiac Life Support • Continuing Education • Board Certified • Physical Therapist Certification • Family Phys./Internal Med. (FP/IM)
29-2000 HEALTH TECHNOLOGISTS & TECHNICIANS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 29-2053: Psychiatric Technicians • 29-2021: Dental Hygienists • 29-2034: Radiologic Technologists • 29-2041: Emergency Medical Techs. & Paramedics • 29-2061: Licensed Practical/Vocational Nurses • 29-2055: Surgical Technologists 	<ul style="list-style-type: none"> • Pediatrics • Ambulances • Electrocardiography machines • Critical care • Geriatrics • Medical-Surgical Nursing • Sterile drapes • Technical support • Emergency room • Breathalyzers 	<ul style="list-style-type: none"> • Certification in CPR • Certified Registered Nurse • Basic Life Support • Driver's License • Licensed Practical Nurse • Emergency Medical Technician • Natl. Registry of EMTs • Advanced Cardiac Life Support • Pediatric Advanced Life Support • Licensed Paramedic
31-1000 NURSING, PSYCHIATRIC, & HOME HEALTH AIDES		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 31-1014: Nursing Assistants 	<ul style="list-style-type: none"> • Cardiac telemetry • Telemetry units • Pediatrics • Signal lights • Quality control • Hemodialysis • English speaker • Catheters • Medical-Surgical Nursing • Patient Electronic Medical Record 	<ul style="list-style-type: none"> • Certified Nursing Assistant • Certification in CPR • Licensed Practical Nurse • Basic Life Support • Certified Medical Assistant • Home Health Aide • First Aid certification • Driver's License • OSHA • Continuing Education
43-4000 INFORMATION & RECORD CLERKS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> • 43-4171: Receptionists & Information Clerks • 43-4051: Customer Service Representatives 	<ul style="list-style-type: none"> • Claims processing admin/mgmt. • Microsoft Office • Bilingual Spanish • Internal / External communication • Medicaid • Multi-line telephone systems • Customer Success • FileNet Content Manager • Freight+ • Two-way Radios 	<ul style="list-style-type: none"> • Driver's License • ICD-10 / ICD-9 • HIPPA • OSHA • Continuing Education • Financial Ind. Regulatory Authority • FINRA / NASD Series 6 • Nationwide Mortgage Lic. System • Security clearance • Certificates of Medical Necessity

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed; Gartner TalentNeuron.

EDUCATION PIPELINE FOR OCCUPATIONAL GROUPS 29 (HEALTHCARE PRACTITIONERS & TECHNICAL), 31 (HEALTHCARE SUPPORT), AND 43 (OFFICE & ADMIN SUPPORT)
MARATHON COUNTY

CIP CODE	PROGRAM	COMPLETIONS		
		2015	2016	2017
51.3902	Nursing Assistant/Aide and Patient Care Assistant/Aide	423	431	427
51.0904	Emergency Medical Technology/Technician (EMT Paramedic)	107	99	124
51.3801	Registered Nursing/Registered Nurse	69	81	89
51.3901	Licensed Practical/Vocational Nurse Training	67	94	84
51.0602	Dental Hygiene/Hygienist	30	29	34
52.0302	Accounting Technology/Technician and Bookkeeping	13	14	34
51.1599	Mental/Social Health Services and Allied Professions, Other	45	40	26
51.0801	Medical/Clinical Assistant	35	29	25
52.0204	Office Management and Supervision	118	45	24
51.0907	Medical Radiologic Technology/Science - Radiation Therapist	11	14	17
51.1009	Phlebotomy Technician/Phlebotomist	—	6	16
51.0713	Medical Insurance Coding Specialist/Coder	27	18	15
51.0601	Dental Assisting/Assistant	17	17	14
51.0714	Medical Insurance Specialist/Medical Biller	37	8	11
52.0407	Business/Office Automation/Technology/Data Entry	3	9	11
52.0408	General Office Occupations and Clerical Svcs	9	4	9
51.1004	Clinical/Medical Laboratory Technician	9	5	7
51.0909	Surgical Technology/Technologist	8	9	6
52.0401	Administrative Assistant and Secretarial Science, General	7	7	6
51.0710	Medical Office Assistant/Specialist	8	9	4
15.0703	Industrial Safety Technology/Technician	—	—	3
51.0716	Medical Admin./Executive Asst. and Medical Secretary	1	3	3
51.2602	Home Health Aide/Home Attendant	1	5	3
11.0601	Data Entry/Microcomputer Applications, General	—	1	1
51.0810	Emergency Care Attendant (EMT Ambulance)	—	—	1
51.1011	Renal/Dialysis Technologist/Technician	2	4	1
51.0708	Medical Transcription/Transcriptionist	—	—	—
51.0808	Veterinary/Animal Health Technology/Technician and Veterinary Assistant	20	12	—
51.0910	Diagnostic Medical Sonography Ultrasound Technician	—	—	—
51.2206	Occupational Health and Industrial Hygiene	13	1	—
51.2312	Assistive/Augmentative Technology and Rehabilitation Engr.	—	—	—
51.3501	Massage Therapy/Therapeutic Massage	17	8	—

Source(s): US Department of Education’s National Center for Education Statistics, IPEDS accessed via EMSI.

AGRICULTURE AND FOOD PROCESSING

Agriculture and food processing are major economic drivers for Wisconsin and for Marathon County. Not only is Wisconsin rightfully branded as “America’s Dairyland,” it also has more organic farms than any state except California. Marathon County, representing the largest land area of any Wisconsin county, is uniquely situated to capitalize on the state’s agricultural strengths. The Wausau region already benefits from multiple large-scale dairy operations, cheese producers/packagers, and other agriculture and food processing industries. Marathon County is also home to the largest concentration of ginseng production and processing in North America.

Beyond the direct benefits of the Wausau region’s agriculture and food processing sector, there are opportunities to link food production to the tourism associated with craft food and beverages. Marathon County is well positioned to become a leading agri-tourism destination in Wisconsin by working with local agriculture and food production companies to promote the region among individuals and groups looking for unique visitor experiences. The ginseng industry exemplifies this opportunity, attracting thousands of international tourists each year.

MARKET OPPORTUNITIES	WAUSAU’S ADVANTAGES
<ul style="list-style-type: none"> • Strong global demand for high-quality US ginseng. • Wisconsin is a national leader in organic farming and is well-positioned to serve growing demand for natural and organic foods in the US and Canada. • Continued growth of craft beverage products including craft breweries, wineries, and distilleries. • Agricultural technology development to support existing industries (such as drones for precision crop management or innovative plant/animal breeding techniques). • Food processing, transportation, warehousing, and distribution of agriculture and food products. 	<ul style="list-style-type: none"> • Largest county in Wisconsin by land area, with hundreds of thousands of acres of tillable land. • Access to major metro areas with rapidly growing demand for organic and natural food products, including Madison, Milwaukee, Chicago, and Minneapolis-Saint Paul. • NTC Agricultural Center of Excellence. • Marathon County is the leading ginseng production location in North America. • Dairy production facilities throughout the region. • High concentration of jobs in agriculture and forestry (LQ of 2.41) in Marathon County.

KEY FOCUS AREAS

NAICS CODE	DESCRIPTION
112000	Animal Production
424430	Dairy Product Merchant Wholesalers
445110	Supermarkets and Other Grocery Stores
311513	Cheese Manufacturing
111000	Crop Production
424490	Other Grocery and Prod. Merchant Wholesalers
311811	Retail Bakeries
453991	Tobacco Stores
115210	Support Activities for Animal Production
115112	Soil Preparation, Planting, and Cultivating
115115	Farm Labor Contractors and Crew Leaders
445210	Meat Markets

TARGET SNAPSHOT

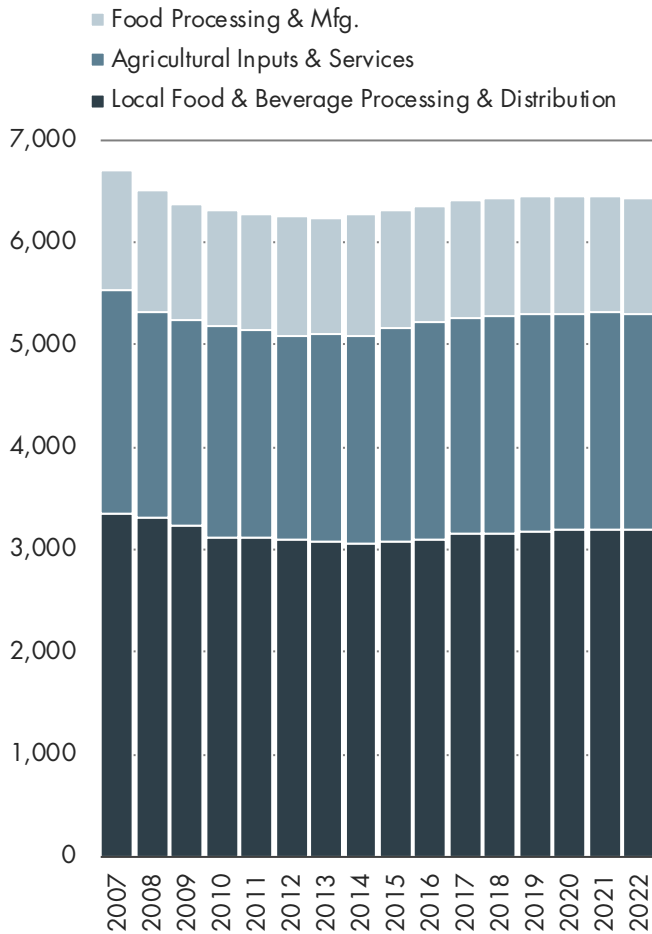
MARATHON COUNTY	TOTAL	TARGET
2017 Payrolled Business Locations	3,437	169
2017 Employment	76,916	6,412
Net Chg., 2007-2017	-1,520	-288
Pct. Chg., 2007-2017	-1.9%	-4.3%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+295,757
Pct. Chg., 2017-2022	+5.9%	+4.0%
MARATHON COUNTY	TOTAL	TARGET
Net Chg., 2017-2022	+2,210	+29
Pct. Chg., 2017-2022	+2.9%	+0.5%

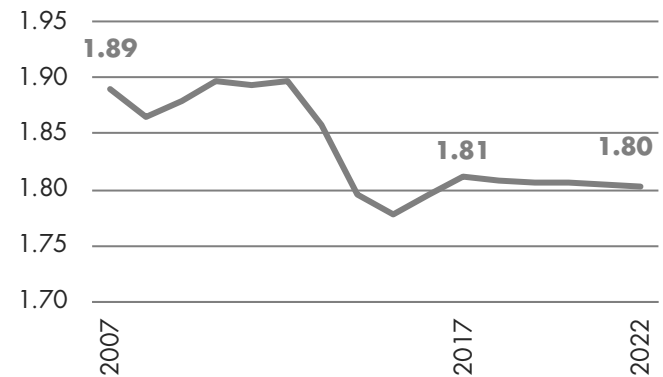
TARGET COMPONENTS

ANNUAL EMPLOYMENT



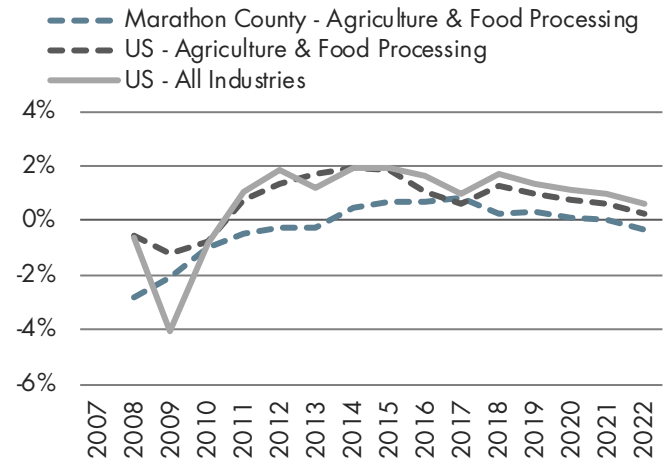
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TARGET STAFFING PROFILE
MARATHON COUNTY

LQs & RELATIVE EARNINGS: **BELOW AVG** →  ← **ABOVE AVG**

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2017 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
11-9013	Farmers, Ranchers, & Other Agricultural Mgrs.	914	14.3%	2.29	12.26	0.99
45-2092	Farmworkers & Laborers, Crop & Greenhouse	587	9.2%	0.91	10.30	0.92
51-9111	Packaging & Filling Machine Workers	458	7.2%	3.29	17.83	1.26
41-2011	Cashiers	393	6.2%	0.44	9.74	0.96
51-3092	Food Batchmakers	329	5.2%	2.99	18.72	1.37
43-5081	Stock Clerks & Order Fillers	276	4.3%	0.52	11.63	0.99
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	276	4.3%	1.92	16.15	1.23
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	246	3.9%	1.98	25.15	0.94
53-3032	Heavy & Tractor-Trailer Truck Drivers	181	2.8%	1.76	19.03	0.96
53-7064	Packers & Packers, Hand	138	2.2%	0.71	14.62	1.29
53-3033	Light Truck or Delivery Services Drivers	111	1.7%	1.85	16.04	1.07
43-9061	Office Clerks, General	86	1.4%	1.50	15.09	0.99
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	81	1.3%	0.74	9.04	0.93
41-2031	Retail Salespersons	80	1.3%	0.36	10.66	0.94
43-4051	Customer Service Representatives	78	1.2%	0.70	14.35	0.90
53-3031	Driver/Sales Workers	77	1.2%	0.88	12.26	1.06
45-2093	Farmworkers, Animals (Incl. Aquaculture)	74	1.2%	1.15	11.52	0.95
41-1011	First-Line Supvsr., Retail Sales Workers	72	1.1%	0.36	17.18	1.01
53-7051	Industrial Truck & Tractor Operators	70	1.1%	1.17	19.71	1.22
43-3031	Bookkeeping, Accounting, & Auditing Clerks	69	1.1%	1.30	16.69	0.89
51-1011	First-Line Supvsr., Production & Operating Workers	67	1.1%	1.14	24.75	0.88
45-2091	Agricultural Equipment Operators	64	1.0%	1.10	14.63	1.02
49-9071	Maintenance & Repair Workers, General	60	0.9%	1.39	19.85	1.10
43-5071	Shipping, Receiving, & Traffic Clerks	55	0.9%	1.11	16.57	1.08
27-1026	Merchandise Displayers & Window Trimmers	51	0.8%	2.63	14.18	1.09

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

OCCUPATIONAL GROUP DETAIL: MARATHON COUNTY

45-2000 AGRICULTURAL WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 45-2092: Farmworkers & Laborers, Crop & Greenhouse 45-2091: Agricultural Equipment Operators 	<ul style="list-style-type: none"> Water hoses Milking machines Telehandlers Large trucks 	<ul style="list-style-type: none"> N/A
51-3000 FOOD PROCESSING WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 51-3092: Food Batchmakers 	<ul style="list-style-type: none"> Meat saws Pallet jacks Meat grinders Scrapers Quality Assurance Bandsaws 	<ul style="list-style-type: none"> Food safety programs
43-5000 MATERIAL RECORDING, SCHEDULING, DISPATCHING, & DISTRIBUTING WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 43-5081: Stock Clerks & Order Fillers 43-5071: Shipping, Receiving, & Traffic Clerks 	<ul style="list-style-type: none"> Forklifts Bills of lading Freight+ Material Handling Handheld scanners Pallet jacks Barcode Stackers Handtrucks Microsoft Office 	<ul style="list-style-type: none"> Driver's License Material Handling Equipment Safe Quality Food HAZMAT Automated External Defibrillator Emergency Medical System OSHA Forklift certification Accredited Purchasing Practitioner First Responder

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed; Gartner TalentNeuron.

EDUCATION PIPELINE FOR OCCUPATIONAL GROUPS 45 (FARMING, FISHING, & FORESTRY) AND 53 (TRANSPORTATION & MATERIAL MOVING) MARATHON COUNTY

CIP CODE	PROGRAM	COMPLETIONS		
		2015	2016	2017
52.0205	Operations Management and Supervision	171	117	135
01.0905	Dairy Science	23	33	19
49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	—	—	18
01.0307	Horse Husbandry/Equine Science and Management	—	—	2

Source(s): US Department of Education’s National Center for Education Statistics, IPEDS accessed via EMSI.

TOURISM AND OUTDOOR RECREATION

Marathon County has an abundance of outdoor recreation opportunities and related tourism assets. The depth and diversity of amenities, destinations, events, and business opportunities related to outdoor recreation is astonishing in comparison to what a typical outside observer might expect. Marathon County contains the largest ski area in Wisconsin, whitewater rapids along the Wisconsin River, the Wausau Curling Club, and an impressive array of outdoor sports events including the Badger State Games, Grand Prix of Wisconsin Championship Powerboat Racing, the Rib Mountain Adventure Challenge, IRONBULL Xtreme Races, Ragnar trail races, and other extreme sports events.

Within the economic development profession, tourism has often been viewed as a separate activity unrelated to economic development. Fortunately, this narrow-minded viewpoint has expanded in recent years to acknowledge the broader benefits of tourism to a regional economy. Tourism provides three significant outcomes for economic development. First, and most direct, is the visitor spending and positive impact on existing businesses. Second is the development of new businesses and destinations to serve visitors. And third, and often least-appreciated, is the talent attraction and brand enhancement aspect of tourism that comes from elevated awareness of a place.

MARKET OPPORTUNITIES	WAUSAU'S ADVANTAGES
<ul style="list-style-type: none"> Proximity to large population base of potential visitors, with a population of more than 20 million within a five-hour drive. Growing interest in extreme sports competitions, events, and festivals. Potential to expand events and festivals, as well as launching new events for visitors and residents. Develop new hotels (national chains and boutique hotels), encourage the growth of locally-owned B&Bs, and AirBnB locations to provide accommodations for a growing visitor base. Growth of new locally-owned retail, restaurants, and nightlife in downtown Wausau. 	<ul style="list-style-type: none"> Granite Peak Ski Area. State parks, wildlife refuges, and natural areas. Outdoor recreation amenities (hike/bike trails, water-related activities, birding, fishing, horseback riding). Badger State Games, IRONBULL Xtreme Races, and other adventure/extreme sports events. Only 45/90 accessible spot in the world (45th latitude, 90th longitude) in Marathon County. Central Wisconsin Airport (CWA) with nonstop connections to MSP, Chicago, and Detroit. Historic and vibrant downtown Wausau.

KEY FOCUS AREAS

NAICS CODE	DESCRIPTION
722511	Full-Service Restaurants
722513	Limited-Service Restaurants
452311	Warehouse Clubs and Supercenters
721110	Hotels (except Casino Hotels) and Motels
452210	Department Stores
722310	Food Service Contractors
711211	Sports Teams and Clubs
713930	Marinas
722514	Cafeterias, Grill Buffets, and Buffets
721211	Recreational Vehicle Parks and Campgrounds

TARGET SNAPSHOT

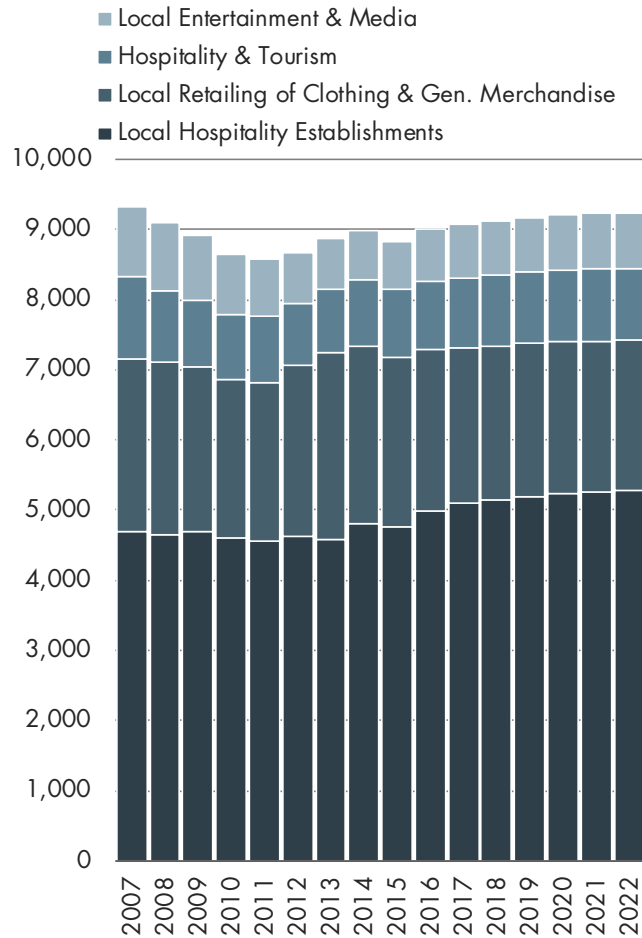
MARATHON COUNTY	TOTAL	TARGET
2017 Payrolled Business Locations	3,437	491
2017 Employment	76,916	9,080
Net Chg., 2007-2017	-1,520	-239
Pct. Chg., 2007-2017	-1.9%	-2.6%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,383,922
Pct. Chg., 2017-2022	+5.9%	+6.0%
MARATHON COUNTY	TOTAL	TARGET
Net Chg., 2017-2022	+2,210	+145
Pct. Chg., 2017-2022	+2.9%	+1.6%

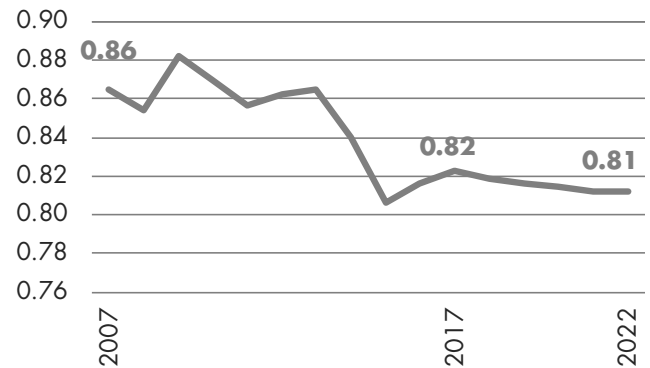
TARGET COMPONENTS

ANNUAL EMPLOYMENT



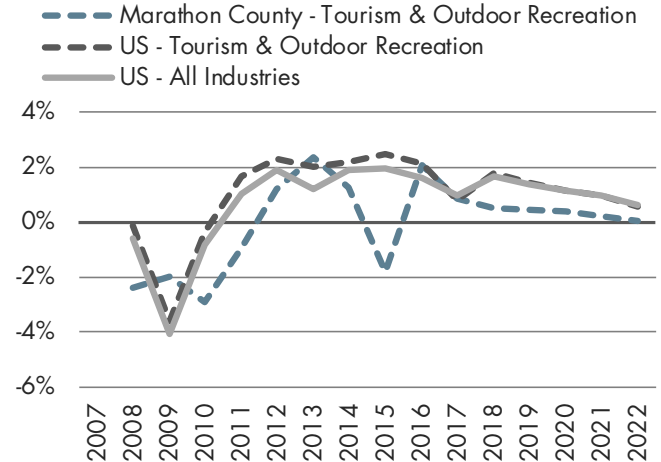
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: **BELOW AVG** →  ← **ABOVE AVG**

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2017 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	1,282	14.1%	1.03	9.04	0.93
41-2031	Retail Salespersons	975	10.7%	0.96	10.66	0.94
35-3031	Waiters & Waitresses	696	7.7%	0.71	9.11	0.91
41-2011	Cashiers	569	6.3%	1.10	9.74	0.96
35-2014	Cooks, Restaurant	562	6.2%	1.13	10.84	0.90
35-3011	Bartenders	491	5.4%	2.27	10.32	0.99
35-1012	First-Line Supvrs., Food Prep. & Servers	392	4.3%	1.23	12.85	0.84
43-5081	Stock Clerks & Order Fillers	283	3.1%	1.08	11.63	0.99
41-1011	First-Line Supvrs., Retail Sales Workers	226	2.5%	0.95	17.18	1.01
37-2012	Maids & Housekeepers	179	2.0%	0.94	9.36	0.90
43-4081	Hotel, Motel, & Resort Desk Clerks	163	1.8%	1.69	9.60	0.87
35-9031	Hosts & Hostesses	155	1.7%	0.97	9.43	0.94
35-9021	Dishwashers	143	1.6%	0.79	9.58	0.93
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	125	1.4%	1.58	11.33	0.93
37-3011	Landscaping & Groundskeeping Workers	124	1.4%	2.63	12.40	1.04
27-2022	Coaches & Scouts	119	1.3%	3.21	10.74	0.56
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	111	1.2%	1.91	16.15	1.23
35-9011	Attendants & Bartender Helpers	98	1.1%	0.64	9.01	0.89
39-9031	Fitness Trainers & Aerobics Instructors	98	1.1%	1.02	13.96	0.75
49-9071	Maintenance & Repair Workers, General	97	1.1%	1.54	19.85	1.10
35-2021	Food Preparation Workers	89	1.0%	0.44	11.04	1.01
11-9051	Food Service Managers	85	0.9%	0.89	15.33	0.75
33-9092	Other Rec. Protective Service Workers	83	0.9%	3.35	7.71	0.75
43-4051	Customer Service Representatives	81	0.9%	1.12	14.35	0.90
43-9061	Office Clerks, General	81	0.9%	1.62	15.09	0.99

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

OCCUPATIONAL GROUP DETAIL: MARATHON COUNTY

35-2000 COOKS & FOOD PREPARATION WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 35-2014: Cooks, Restaurant 	<ul style="list-style-type: none"> Food preparation Lifelines Broilers Slicing machines Refrigeration units Hazard analysis and critical control points Mathematics Hot plates Institutional dietary service Point of sale POS systems 	<ul style="list-style-type: none"> Food safety programs
35-3000 FOOD & BEVERAGE SERVING WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 35-3021: Combined Food Prep. & Servers, Incl. Fast Food 35-3031: Waiters & Waitresses 35-3011: Bartenders 	<ul style="list-style-type: none"> Lifelines Food preparation Hazard analysis and critical control points Point of sale POS systems Computerized cash registers Blenders Frozen drink machines Espresso machines Quality control Bartending 	<ul style="list-style-type: none"> Food safety programs HAZMAT ServSafe Alcohol
41-2000 RETAIL SALES WORKERS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 41-2031: Retail Salespersons 41-2011: Cashiers 	<ul style="list-style-type: none"> Mathematics Freight+ Microsoft Office Flatbed scanners Forklifts Food preparation Handheld scanners Inventory management systems Pharmacy Benefit Management Point of sale POS systems 	<ul style="list-style-type: none"> Driver's License Automotive Service Excellence Occupational Safety & Health Administration Certification HAZMAT Commercial Driver's License Class A Commercial Drivers License First Aid certification Certified Sales Representative ICD-10 / ICD-9

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed; Gartner TalentNeuron

EDUCATION PIPELINE FOR OCCUPATIONAL GROUPS 27 (ARTS, DESIGN, ENTERTAINMENT, SPORTS, & MEDIA), 35 (FOOD PREP. & SERVING RELATED), 39 (PERSONAL CARE & SERVICE), AND 41 (SALES & RELATED)
 MARATHON COUNTY

CIP CODE	PROGRAM	COMPLETIONS		
		2015	2016	2017
52.0205	Operations Management and Supervision	171	117	135
19.0709	Child Care Provider/Assistant	—	—	123
52.0201	Business Administration and Management, General	55	46	57
52.1801	Sales, Distribution, and Marketing Operations, General	—	1	17
52.1899	Gen. Merchandising, Sales, and Related Mktng. Ops., Other	—	—	14
50.0402	Commercial and Advertising Art	4	5	8
50.0602	Cinematography and Film/Video Production	—	—	4
52.1803	Retailing and Retail Operations	—	—	4
09.0101	Speech Communication and Rhetoric	—	—	3
51.2602	Home Health Aide/Home Attendant	1	5	3
09.0702	Digital Communication and Media/Multimedia	—	—	2
12.0412	Salon/Beauty Salon Management/Manager	3	5	2
15.0613	Manufacturing Engineering Technology/Technician	1	3	2
09.9999	Communication, Journalism, and Related Programs, Other	—	—	—
16.1603	Sign Language Interpretation and Translation	—	10	—
47.0103	Communications Systems Installation and Repair Technology	—	—	—
52.1908	Business and Personal/Financial Services Marketing Operations	—	—	—

Source(s): US Department of Education’s National Center for Education Statistics, IPEDS accessed via EMSI.

IT AND BUSINESS SERVICES

The US economy has changed in fundamental ways in the last several decades. In 1960, nearly 30 percent of all US employment was in manufacturing, with the professional and business services accounting for just 7 percent of the total. While manufacturing remained the largest sector by total employment until the 1980s, professional and business services employment grew steadily, reflecting the increasing role of technology in the sector. As the pace of technological change accelerated, employment in the professional and service sector has more than doubled to 15 percent of all jobs in 2018, while manufacturing employment has dropped dramatically.

However, the impact of IT growth is no longer isolated to a single sector. IT and software are essential for the success of nearly all industries today. The stronger economic performance of tech hubs in the last 20 years—Austin, Seattle, even smaller tech hubs like Madison—is a good indicator of the increasing role that technology-enabled companies and workers now play in the overall growth of regional economies. While much of the Wausau region’s current economic base is tied to manufacturing, healthcare, and agriculture, its economic future will be closely linked to the success of efforts to grow the area’s IT and business services sector.

MARKET OPPORTUNITIES	WAUSAU’S ADVANTAGES
<ul style="list-style-type: none"> Industrial IoT (Internet of Things) creating new business opportunities at the cross-section of manufacturing and software/IT. Projected job growth in Marathon County’s IT and business services sector of 11 percent over the next five years. Rapid growth of remote workers nationwide—especially in IT & business services firms—with the highest concentrations of remote workers in smaller metros like Boulder, Bend, and Asheville that have become known as outdoor recreation hubs. 	<ul style="list-style-type: none"> Major corporations (Aspirus, Greenheck, Eastbay, Church Mutual) collectively employ hundreds of tech workers and provide a critical mass of demand for IT & business services firms. Proximity to thriving innovation environment in Madison and growing tech scene in Green Bay. Low concentration of jobs in professional services (LQ of 0.44) in Marathon County indicates unmet demand for IT & business services. High correlation between remote workers and places with outdoor recreation amenities.

KEY FOCUS AREAS

NAICS CODE	DESCRIPTION
551114	Corp., Subsidiary, & Regional Managing Offices
524126	Direct Property and Casualty Insurance Carriers
524114	Direct Health and Medical Insurance Carriers
541110	Offices of Lawyers
541330	Engineering Services
541219	Other Accounting Services
522291	Consumer Lending
522220	Sales Financing
541511	Custom Computer Programming Services
523930	Investment Advice
541512	Computer Systems Design Services
511210	Software Publishers

TARGET SNAPSHOT

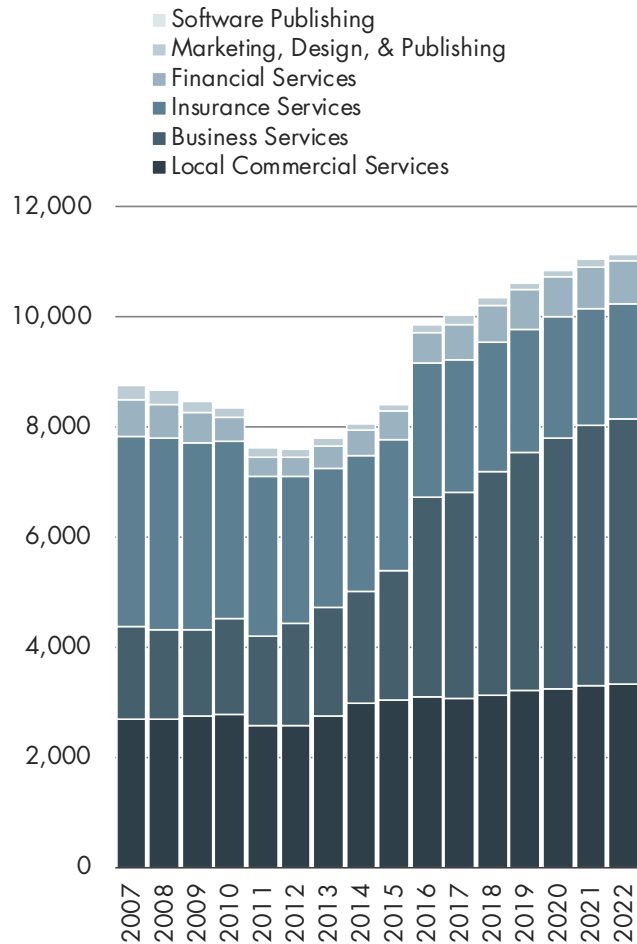
MARATHON COUNTY	TOTAL	TARGET
2017 Payrolled Business Locations	3,437	425
2017 Employment	76,916	10,040
Net Chg., 2007-2017	-1,520	+1,266
Pct. Chg., 2007-2017	-1.9%	+14.4%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,967,632
Pct. Chg., 2017-2022	+5.9%	+8.0%
MARATHON COUNTY	TOTAL	TARGET
Net Chg., 2017-2022	+2,210	+1,127
Pct. Chg., 2017-2022	+2.9%	+11.2%

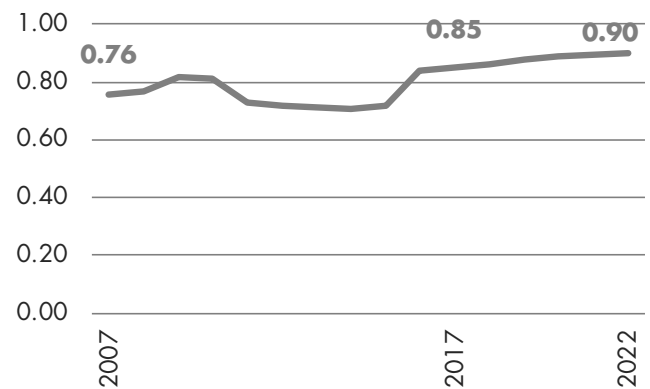
TARGET COMPONENTS

ANNUAL EMPLOYMENT



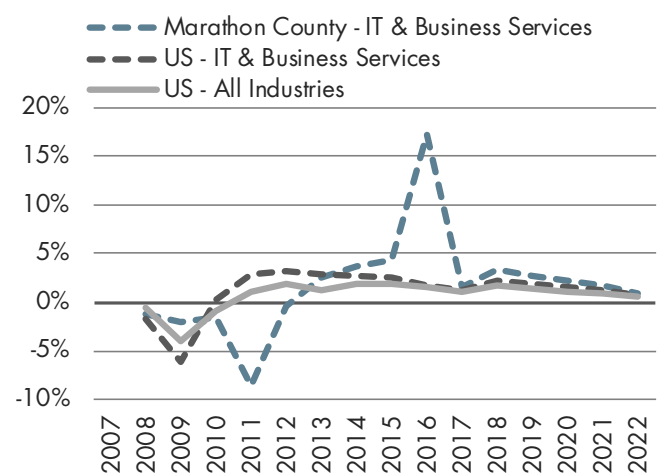
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: **BELOW AVG** →  ← **ABOVE AVG**

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2017 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	507	5.1%	1.17	11.33	0.93
43-4051	Customer Service Representatives	488	4.9%	1.19	14.35	0.90
13-1031	Claims Adjusters, Examiners, & Investigators	384	3.8%	5.69	32.88	1.07
43-9041	Insurance Claims & Policy Processing Clerks	353	3.5%	5.59	17.30	0.92
43-9061	Office Clerks, General	349	3.5%	1.34	15.09	0.99
43-3031	Bookkeeping, Accounting, & Auditing Clerks	324	3.2%	1.76	16.69	0.89
13-2011	Accountants & Auditors	294	2.9%	1.01	29.12	0.90
15-1121	Computer Systems Analysts	270	2.7%	1.68	31.61	0.75
15-1132	Software Developers, Applications	223	2.2%	0.96	41.86	0.86
13-1161	Market Research Analysts & Mktng. Specialists	202	2.0%	1.52	23.52	0.78
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	187	1.9%	0.70	16.15	1.23
41-3021	Insurance Sales Agents	186	1.9%	2.26	19.29	0.82
23-1011	Lawyers	183	1.8%	0.76	38.24	0.82
43-1011	First-Line Supvsr., Office & Admin. Support	183	1.8%	1.31	23.48	0.89
11-1021	General & Operations Managers	162	1.6%	0.75	44.89	0.94
13-1111	Management Analysts	140	1.4%	0.63	27.57	0.75
13-1071	Human Resources Specialists	139	1.4%	1.36	26.09	0.89
11-9199	Managers, All Other	138	1.4%	1.55	25.08	1.00
11-3031	Financial Managers	133	1.3%	1.20	52.10	0.88
33-9032	Security Guards	131	1.3%	0.44	11.05	0.85
13-2072	Loan Officers	122	1.2%	1.90	29.26	0.94
15-1151	Computer User Support Specialists	105	1.1%	0.81	22.81	0.94
13-1028	Buyers and Purchasing Agents	104	1.0%	3.01	25.29	0.84
43-3011	Bill & Account Collectors	97	1.0%	1.54	17.15	1.01
41-3099	Sales Reps., Services, All Other	93	0.9%	0.51	18.32	0.74

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI

OCCUPATIONAL GROUP DETAIL

13-1000 BUSINESS OPERATIONS SPECIALISTS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 13-1031: Claims Adjusters, Examiners, & Investigators 13-1161: Market Research Analysts & Mktng. Specialists 13-1111: Management Analysts 13-1071: Human Resources Specialists 13-1028: Buyers and Purchasing Agents 	<ul style="list-style-type: none"> Microsoft Office Microsoft PowerPoint Pharmacy Benefit Management Curtain wall OptumRx Claims processing admin/mgmt. Recruitment advertising Human Resource Information System Microsoft Access Microsoft Office Visio 	<ul style="list-style-type: none"> Driver's License Professional in Human Resources Six Sigma Green Belt - LEAN Senior Prof. in Human Resources Security clearance Continuing Education Cert. Property Casualty Underwriter Accredited Purchasing Practitioner Pharmacy Technician Chartered Life Underwriter
15-1000 COMPUTER OCCUPATIONS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 15-1121: Computer Systems Analysts 15-1132: Software Developers, Applications 15-1151: Computer User Support Specialists 	<ul style="list-style-type: none"> Software development Technical support C# Structured query language Systems Development Life Cycle Microsoft Office Microsoft .NET Framework Quality Assurance Microsoft Active Directory Microsoft SQL Server 	<ul style="list-style-type: none"> Driver's License Security clearance Application Developer Microsoft Certified Systems Engineer BPM Programming Languages Cisco Certified Network Associate Microsoft Certified Professional Cisco Certified Network Professional Certified Info. Systems Security Prof. Certified Scrum Master
43-3000 FINANCIAL CLERKS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 43-3031: Bookkeeping, Accounting, & Auditing Clerks 43-3011: Bill & Account Collectors 41-3099: Sales Reps., Services, All Other 	<ul style="list-style-type: none"> Accounts payable Accounts Receivable Microsoft Office Bilingual Computer navigation General Ledger Software Curtain wall Intuit QuickBooks Photocopiers Accounting software 	<ul style="list-style-type: none"> Accredited Purchasing Practitioner Certified Payroll Professional Certified Bookkeeper Advanced Certification Administrator Nationwide Mortgage Licensing System Driver's License ICD-10 / ICD-9
43-4000 INFORMATION & RECORD CLERKS		
Key Occupation(s)	Skills	Certifications
<ul style="list-style-type: none"> 43-4051 Customer Service Representatives 	<ul style="list-style-type: none"> Claims processing admin/mgmt. Microsoft Office Bilingual Spanish Internal / External communication Medicaid Multi-line telephone systems Customer Success FileNet Content Manager Freight+ Two-way Radios 	<ul style="list-style-type: none"> Driver's License ICD-10 / ICD-9 HIPPA OSHA Continuing Education Financial Ind. Regulatory Authority FINRA / NASD Series 6 Nationwide Mortgage Lic. System Security clearance Certificates of Medical Necessity

Source(s): EMSI 2018.4 – QCEW Employees, Non-QCEW Employees, and Self-Employed; Gartner TalentNeuron

EDUCATION PIPELINE FOR OCCUPATIONAL GROUPS 11 (MANAGEMENT), 13 (BUSINESS & FINANCIAL OPS.), 15 (COMPUTER & MATHEMATICAL), AND 43 (OFFICE & ADMIN. SUPPORT)
 MARATHON COUNTY

CIP CODE	PROGRAM	COMPLETIONS		
		2015	2016	2017
52.0205	Operations Management and Supervision	171	117	135
52.0201	Business Administration and Management, General	55	46	57
11.0201	Computer Programming/Programmer, General	37	38	43
52.0301	Accounting	37	35	43
52.1401	Marketing/Marketing Management, General	10	26	37
52.0302	Accounting Technology/Technician and Bookkeeping	13	14	34
52.0204	Office Management and Supervision	118	45	24
11.0202	Computer Programming, Specific Applications	12	18	22
11.0802	Data Modeling/Warehousing and Database Administration	10	26	22
11.1006	Computer Support Specialist	41	15	19
52.1801	Sales, Distribution, and Marketing Operations, General	—	1	17
52.1001	Human Resources Mgmt./Personnel Administration, General	—	—	16
11.0901	Computer Systems Networking and Telecommunications	23	15	15
11.1001	Network and System Administration/Administrator	34	9	14
52.1899	Gen. Merchandising, Sales, Related Mktng. Ops., Other	—	—	14
11.1004	Web/Multimedia Management and Webmaster	9	13	12
52.0407	Business/Office Automation/Technology/Data Entry	3	9	11
52.0305	Accounting and Business/Management	—	—	9
52.0408	General Office Occupations and Clerical Services	9	4	9
44.0000	Human Services, General	—	—	7
52.0401	Administrative Assistant and Secretarial Science, General	7	7	6
51.0710	Medical Office Assistant/Specialist	8	9	4
14.1401	Environmental/Environmental Health Engineering	—	2	2
52.0203	Logistics, Materials, and Supply Chain Management	—	—	2
11.0601	Data Entry/Microcomputer Applications, General	—	1	1
11.0101	Computer and Information Sciences, General	—	—	—
11.0103	Information Technology	—	—	—
11.0401	Information Science/Studies	—	—	—
11.0501	Computer Systems Analysis/Analyst	—	—	—
22.0301	Legal Administrative Assistant/Secretary	—	—	—
22.9999	Legal Professions and Studies, Other	—	—	—
47.0103	Communications Systems Installation and Repair Technology	—	—	—
52.0703	Small Business Administration/Management	—	—	—

Source(s): US Department of Education’s National Center for Education Statistics, IPEDS accessed via EMSI.

APPENDIX 4. STAKEHOLDER SURVEY

As part of the strategic planning process, TIP Strategies conducted an online survey of stakeholders in the Greater Wausau Region. The survey was open throughout the month of November 2018 and drew 328 respondents. The survey instrument included 11 core questions about resident characteristics, their perceptions about the region's challenges, and their vision for its future. An additional ten questions were directed at a subset of respondents who held direct hiring and personnel management responsibilities. Those questions were focused on industries, occupations, and skills in which regional employers faced unique hiring challenges. All responses were confidential. Complete question-by-question survey results were delivered to the Wausau Chamber in an interactive data visualization using Tableau Reader. The key findings of this survey, summarized below, were used to guide the direction of the strategic plan.

DIVERSITY OF RESPONSES. Survey responses were geographically dispersed by zip code of residence and demographically dispersed by age cohort. Those respondents indicating hiring responsibilities represented roughly two-thirds of total participants (214 out of 328). Though not designed to be a scientific sample, the pool of respondents was nevertheless an adequate representation of the region's workplace zip codes, employer industries, and establishment sizes.

HIRING. In general, more respondents expected hiring to decelerate in the next 2-3 years than those expecting it to accelerate. One exception was for the recruitment of professional and technical workers, the only occupational category where a plurality of respondents anticipated hiring acceleration. Respondents also reported management vacancies taking longer to fill than other occupational categories. Occupations associated with management, sales, education, engineering, maintenance, and machining were among those most cited as most difficult to fill.

FACTORS INFLUENCING SUCCESS. Ability to retain and attract qualified employees were the two factors respondents cited as most critical to *their organization's* success. Notably, of the 15 factors respondents were asked to rate, these two factors ranked first and second across all employer sizes — small, medium, and large. There was also consensus across all employer sizes that the two factors most influencing the *Wausau region's* success were quality of life and quality of primary and secondary schools.

COMPETITIVENESS. Survey respondents were asked to assess the Wausau region's competitiveness. The overall results were evenly balanced between those seeing the region as "highly competitive" or "above average" versus those who saw it as "uncompetitive" or "below average." Differences in perspective, however, broke starkly across age cohorts. In general, the older the respondent, the more likely to have a favorable view of Wausau's competitiveness. The younger the respondent, the more likely to see the region as uncompetitive.

CHALLENGES AND OPPORTUNITIES. Several questions in the survey probed respondents on regional challenges, opportunities, and visions for the future. The theme that emerged from the stakeholders was largely one of behavioral economics, i.e., how personal choices impact the region's workplaces and its civic life. How does Wausau attract and retain skilled workers? How does Wausau retain its young adults? Workforce-related factors were overwhelmingly mentioned by respondents as the main issue holding the region back, and on this point, participant views were largely aligned across age cohorts. Fragmentation and division were viewed by many respondents as the status quo, but regional collaboration was often cited as a preferred path for economic development.