

CHAPTER 6 Economic Development Element

66.1001 (2)(f) Wis. Stat:

Economic Development element. A compilation of objectives, policies, goals, maps and programs to promote the stabilization, retention or expansion of the economic base and quality employment opportunities in the local governmental unit, including an analysis of the labor force and economic base of the local governmental unit. The element shall assess categories or particular types of new businesses and industries that are desired by the local governmental unit. The element shall assess the local governmental unit's strengths and weaknesses with respect to attracting and retaining businesses and industries, and shall designate an adequate number of sites for such businesses and industries. The element shall also evaluate and promote the use of environmentally contaminated sites for commercial or industrial uses. The element shall also identify county, region and state economic development programs that apply to the local governmental unit.

Section 6.1 Introduction

The text for this chapter was taken primarily from a report entitled "Portage County Economic Development Study", which was completed by the University of Wisconsin-Extension Center for Community Economic Development and Portage County UW-Extension in January of 2004. The data examines Portage County's economic growth, the structure of its industry base and provides a general overview of its labor force. To provide baselines for comparison, the economic data from Portage County is presented along with information from the State of Wisconsin and the United States; a number of maps are provided to aid in understanding regional variations.

Section 6.2 Population and Employment

A. Population Trends

Growth in a region's population is one of the most basic indicators of economic change. Table 6.1 shows the trends in Portage County's population growth over the previous three decades. Over the 30-year period, Portage County has shown strong population growth. With a rate of 41.3%, growth occurred faster than either the State or the Nation. However, this long term growth rate is somewhat deceiving. Most of

Table 6.1: Population Change 1970 – 2020

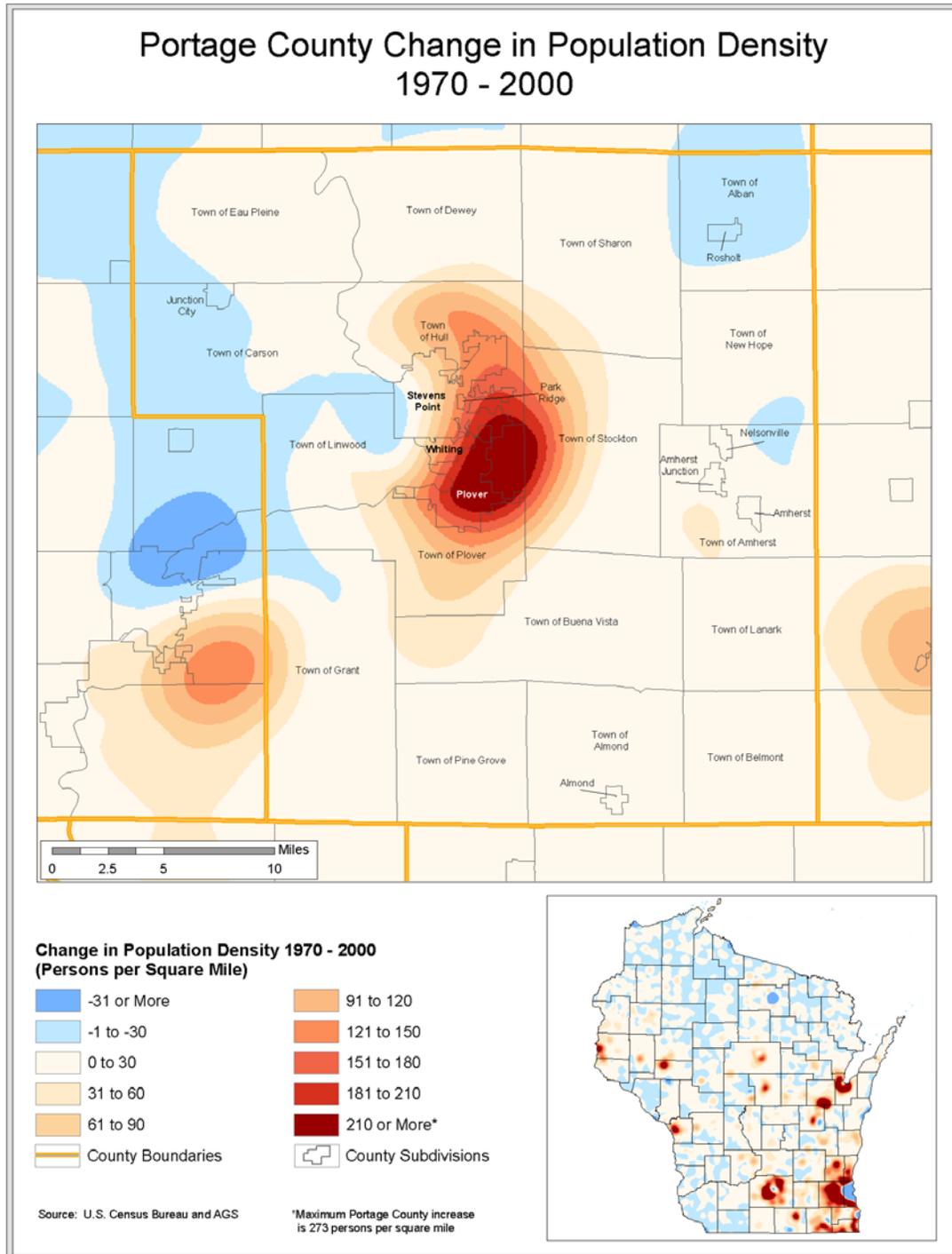
Year	Portage County	State of Wisconsin	United States
Population - 1970	47,541	4,417,731	203,211,926
Population - 1980	57,420	4,705,767	226,545,805
Population - 1990	61,405	4,891,769	248,709,873
Population - 2000	67,182	5,363,675	281,421,906
Change 1970 - 1980	20.8%	6.5%	11.5%
Change 1980 - 1990	6.9%	4.0%	9.8%
Change 1990 - 2000	9.4%	9.6%	13.2%
Change 1970 - 2000	41.3%	21.4%	38.5%

Source: Bureau of Economic Analysis

Portage County's growth occurred between 1970 and 1980. Furthermore, between 1990 and 2000, Portage County grew at a rate slower than Wisconsin and the U.S.

Map 1.1 shows the change in regional population densities between 1970 and 2000. The map shows some distinct differences in population patterns. Most of Portage County's population growth has occurred on the eastern portion of the urban core area (Stevens Point and Plover). Given the trend towards urbanization, rural areas around the urban core may be the most sensitive to future growth. This trend is in contrast to the rural population growth in other areas. In rural areas not adjacent to the urban core, population growth has been somewhat limited with some areas experiencing small population losses.

Map 6.1 – Portage County Change in Population Density 1970 – 2000

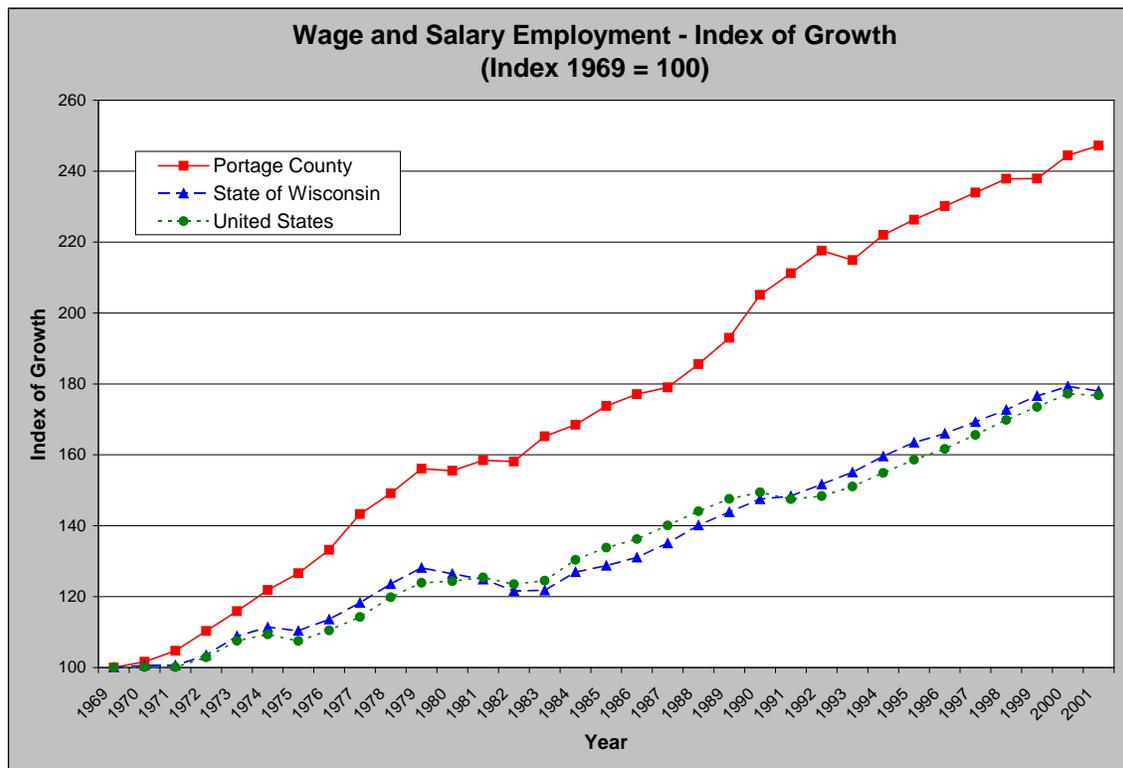


B. Growth in Salary and Wage Employment

Typically, growth in employment will drive changes in population and ultimately the region's economy. Therefore, it is important to understand how the number of jobs has changed over time for both a land use perspective and as an economic measure. Again, changes in employment for the State of Wisconsin and the United States are provided for comparison purposes.

Chart 6.1 shows the trend in overall employment growth. In terms of total employment growth, it appears that Portage County has traditionally been less sensitive to periods of recession than either the State or the Nation. Both the State and United States show employment declines in the recession periods of 1973-1975, 1980-1982, and 1990-1991. While Portage County showed some stagnation in the early 1980's, the only noticeable period of decline was between 1992 and 1993. This trend continued into 2001, with the number of Portage County jobs remaining steady, while the United States and State of Wisconsin both experienced losses.

Chart 6.1: Portage County Salary and Wage Employment 1969 – 2001



Source: Bureau of Economic Analysis

C. Employment by Industry Sector

While total employment provides a broad description of economic activity, an examination of individual sectors provides additional insight. Table 6.2 shows the percentage of total employment by different industry sectors for both 1969 and 2000. This data examines how employment has changed within the County relative to the State and the Nation. Not unlike Wisconsin, Portage County experienced a large loss in the percentage of jobs in the farm employment sector. However, in contrast to the State and the U.S., the County had a significantly smaller decrease in the percentage of people employed in the manufacturing sector.

While the government (including UW-Stevens Point) has traditionally employed a large percentage of the workforce, the three largest private employment sectors have traditionally been manufacturing, retail trade, and services. Job growth in Portage County's retail sector has outpaced both the United States and Wisconsin. Much of this growth has come from catalog-based retailers (such as Lands' End), the Copps Corporation and big box expansion into Portage County. While growth in the service sector has increased dramatically, it has lagged slightly behind the State and Nation. One other notable sector in Portage County is the finance,

insurance and real estate sector (F.I.R.E). Given the presence of Sentry Insurance, the size of this sector should not be surprising.

Table 6.2: Percent Employed by Industry Sector

Employment by Industry	Portage County		State of Wisconsin		United States	
	1969	2000	1969	2000	1969	2000
Total employment	17,764	41,596	1,943,519	3,443,874	91,057,200	167,465,300
Farm employment	12.3%	3.8%	7.7%	2.9%	4.4%	1.9%
Ag. services, forestry, fishing and mining	0.7%	1.2%	0.6%	1.2%	1.4%	1.8%
Construction	3.8%	4.2%	4.6%	5.2%	4.9%	5.7%
Manufacturing	15.4%	15.2%	27.2%	18.4%	22.6%	11.4%
Transportation and public utilities	7.1%	6.3%	4.5%	4.5%	5.3%	4.9%
Wholesale trade	4.1%	4.6%	3.8%	4.4%	4.5%	4.5%
Retail trade	15.4%	18.2%	16.8%	17.1%	14.8%	16.3%
Finance, insurance, and real estate	9.9%	10.8%	5.1%	6.8%	6.5%	8.1%
Services	13.7%	21.5%	15.7%	27.8%	18.4%	31.8%
Government	17.6%	14.3%	14.0%	11.7%	17.4%	13.6%

Source: Bureau of Economic Analysis

D. Net Job Creation by Sector

Table 6.3 examines net job creation in each sector between 1969 and 2000. The data shows that a net of 23,832 new jobs were created over the previous three decades. The largest private sector increases have been in areas of manufacturing, retail trade, services and finance, insurance and real estate (F.I.R.E). While the trends in retail trade and F.I.R.E are similar to those of the State of Wisconsin and the U.S., growth in manufacturing has been greater than either the State or Nation. Furthermore, the growth in services has been significant, but has occurred at a slower rate than Wisconsin or the U.S.

Table 6.3: Net Job Creation, 1969 to 2000

Net New Jobs 1969 to 2000	Portage County		State of Wisconsin		United States	
	Number	% of Total	Number	% of Total	Number	% of Total
Net New Jobs	23,832	N/A	1,500,355	N/A	76,408,100	N/A
Farm employment	-590	-2.5%	-48,356	-3.2%	-875,000	-1.1%
Ag. services, forestry, fishing and Mining	362	1.5%	29,370	2.0%	1,721,500	2.3%
Construction	1,070	4.5%	88,147	5.9%	5,133,500	6.7%
Manufacturing	3,585	15.0%	103,398	6.9%	-1,439,100	-1.9%
Transportation and public utilities	1,347	5.7%	68,207	4.5%	3,451,200	4.5%
Wholesale trade	1,183	5.0%	77,565	5.2%	3,487,000	4.6%
Retail trade	4,819	20.2%	263,730	17.6%	13,895,200	18.2%
Finance, insurance, and real estate	2,744	11.5%	135,964	9.1%	7,580,200	9.9%
Services	6,513	27.3%	651,155	43.4%	36,553,600	47.8%
Government	2,799	11.7%	131,175	8.7%	6,900,000	9.0%

Source: Bureau of Economic Analysis

Attention should be given to the change in manufacturing jobs. The significant growth in Portage County contrasts current national and regional trends in manufacturing employment.

This manufacturing growth may point to either an economic strength or future liability for Portage County. The charts on the following pages track the growth in the largest four private employment sectors. An examination of these charts provides some important insights.

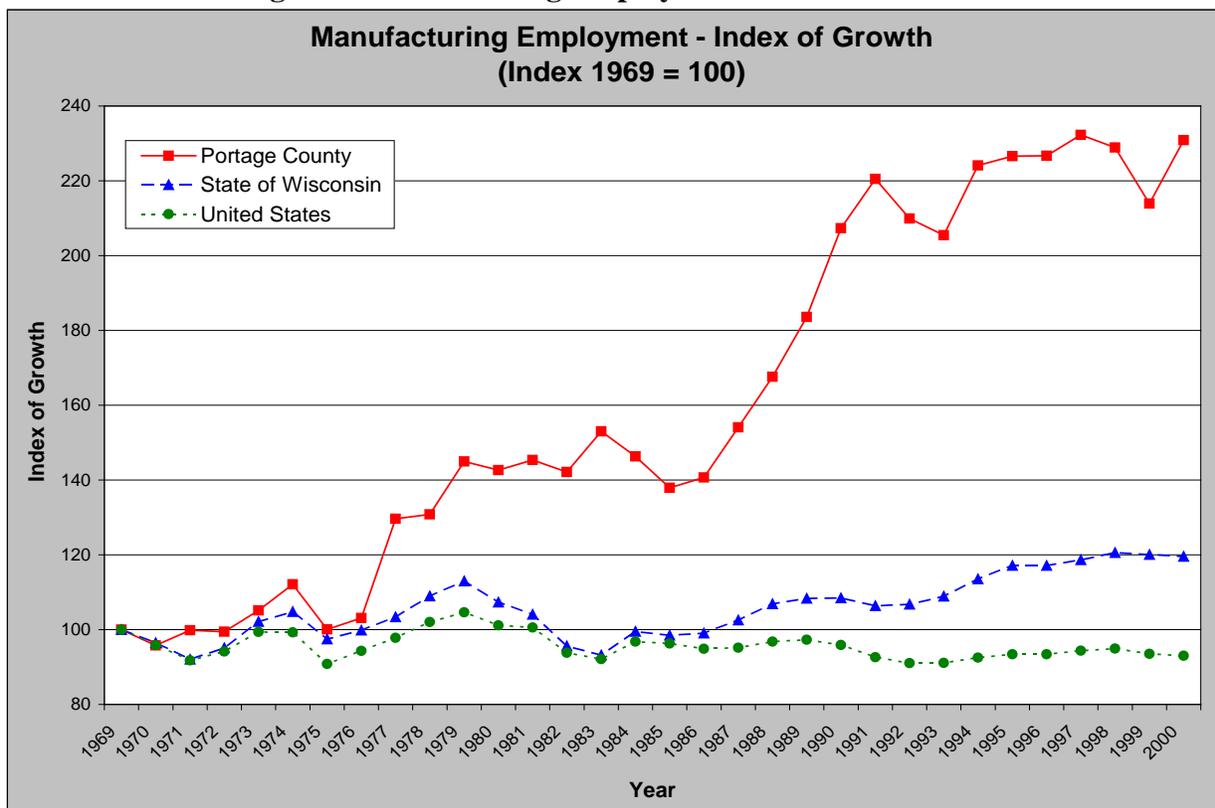
1. Manufacturing Employment Sector

Chart 6.2 tracks the yearly change in manufacturing employment. The data shows that manufacturing employment growth in Portage County has been significant between 1969 and 2000. Over this period, Portage County added a net of 3,585 new manufacturing jobs, with much of this growth occurring between 1986 and 1991. This growth has been in contrast to declining manufacturing employment in the United States and a stagnant/declining industry in Wisconsin.

Some of these differences might be explained by the dominance of non-durable manufacturers instead of a dependence on durable products. Stora Enso North America Corporation, McCain Foods, Kimberly Clark, Del Monte and Golden County Foods are all large employers involved in manufacturing non-durable products.

As previously mentioned, trends in Portage County manufacturing employment have not followed those of the State and Nation. However, there is no guarantee that manufacturing in Portage County will continue to oppose these trends. The closing of SNE Enterprises in 2002 and layoffs at Stora Enso North America in 2003 show that Portage County is not insulated from losses in manufacturing employment. Whether manufacturing will continue to be an asset to the County or a potential liability remains unresolved. Given these trends, the role of manufacturing in Portage County’s future economic development needs to be considered from both recruitment and retention standpoints.

Chart 6.2: Changes in Manufacturing Employment 1969 to 2000



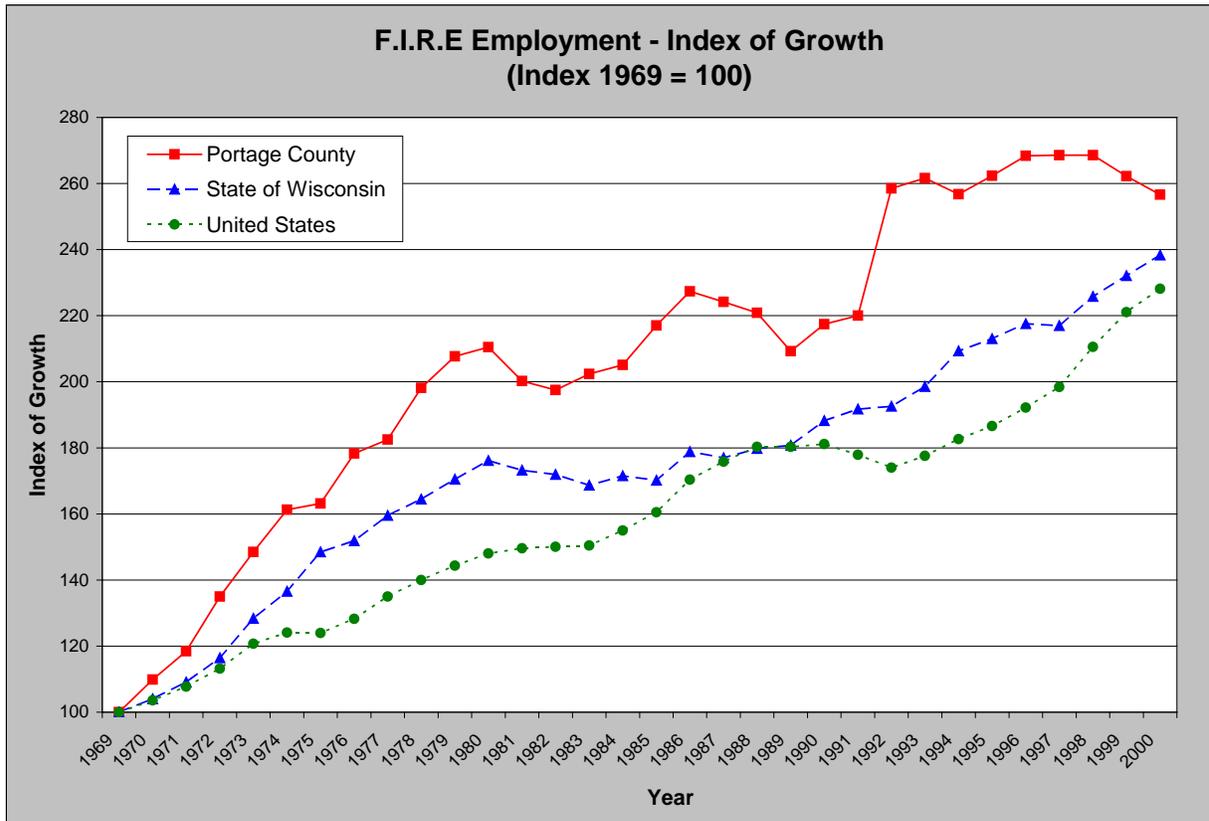
Source: Bureau of Economic Analysis

2. Finance, Insurance and Real Estate (F.I.R.E) Employment Sector

Chart 6.3 examines trends in Portage County’s F.I.R.E employment sector between 1969 and 2000. Over this period, Portage County added a net of 2,744 new F.I.R.E jobs. While Portage County’s overall growth in this sector has been somewhat erratic, it outpaced both the State and Nation. However, over the past five years, growth became stagnant and then declined in Portage County. These changes are seen despite growing sectors in Wisconsin and the U.S. The recent loss of jobs at Blue Cross & Blue Shield in Stevens Point is not shown in this chart and may further this trend. Given these state and national trends, particular attention should be given to the recent decline in Portage County’s F.I.R.E sector employment.

While other sectors depend on a number of large employers, F.I.R.E employment in Portage County relies heavily on Sentry Insurance. Not only is it the largest employer within this sector, but Sentry Insurance is also the largest overall employer in the County. As a result, the performance of this single business will have a greater impact on the F.I.R.E sector’s employment than other single large employers in different sectors.

Chart 6.3: Changes in F.I.R.E Employment 1969 to 2000



Source: Bureau of Economic Analysis

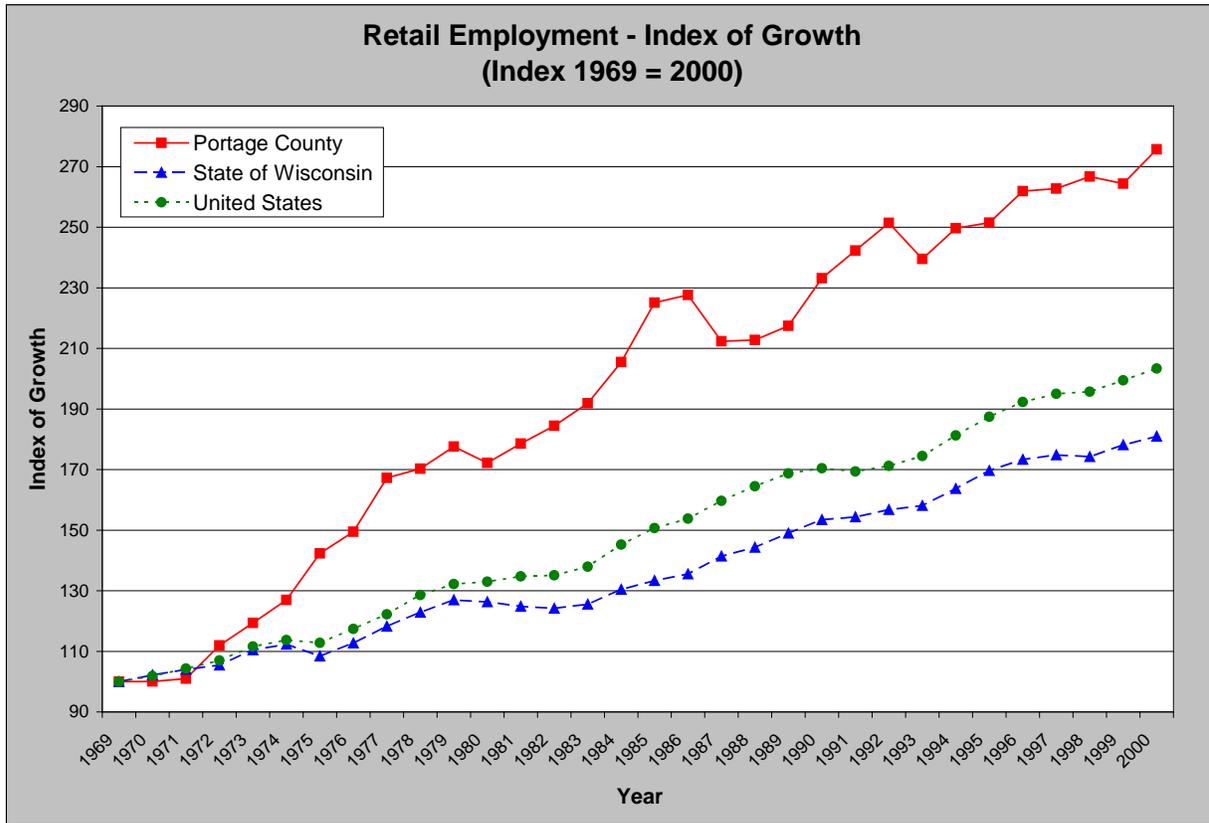
3. Retail Employment Sector

Chart 6.4 tracks changes in retail employment between 1969 and 2000. Retail employment in Portage County continues to grow at a faster pace than the State or Nation. With 4,819 net new jobs, growth in the retail sector has made it the second largest employment sector in Portage County. New retail jobs have come from both traditional retail establishments as well as catalog-based retailers. The presence of catalog-based retailers such as Lands’ End,

Herrschners Inc. and Figi's Mail Order Gifts, Inc., account for three of the County's 25 largest employers.

In addition to catalog-based retailers, Portage County has emerged as a regional retail destination. Similar to other areas in the State and Nation, in the past 30 years Portage County has seen the emergence of big box retailers such as Menard's, Wal-Mart, Shopko and Target. The growth in number of these large establishments has contributed to the overall increase in retail jobs.

Chart 6.4: Change in Retail Employment 1969 to 2000



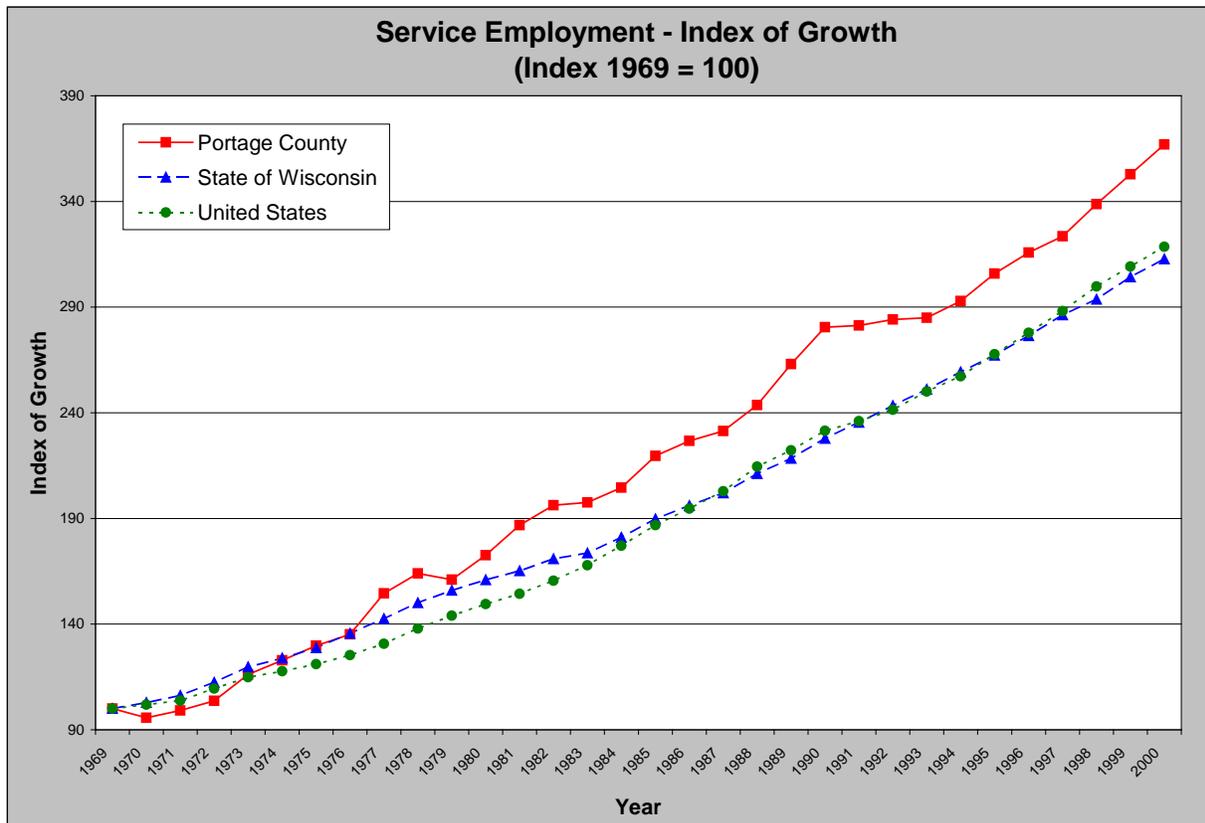
Source: Bureau of Economic Analysis

4. Service Employment Sector

Chart 6.5 examines service sector employment between 1969 and 2000. With a net of 6,513 new jobs, the Portage County service sector accounted for the largest number of net new jobs over this 31-year period. The overall growth rate has been similar to rates in the State and Nation. In contrast to the erratic nature of the manufacturing, F.I.R.E and retail sectors, growth has been steady with little or no decline from one year to the next. (Qualex Inc. closed in 2003 and the impact of these losses on the overall service sector are not known at the time of this publication).

It is important to note that large employers such as UW-Stevens Point, the County of Portage and Stevens Point public schools are included in the government employment sector. Large employers in this sector include the Ministry Medical Group, the Noel Group, Cap Services, Inc., Eldercare Resources Corporation and the large number of hospitality establishments in the County.

Chart 6.5: Change in Service Sector Employment 1969 to 2000



Source: Bureau of Economic Analysis

Section 6.3 Income and Earnings

A. Per Capita Personal Income Trends

In addition to population and employment growth, another basic measure of Portage County’s economy is growth in per capita personal income. Personal income consists of income that is received by persons from participation in production, from government and business transfer payments, and payments from government interest. Per capita personal income normalizes this total income of an area by its total population. When compared to state and national trends, it provides one indication of how well Portage County’s economy is performing.

Table 6.4 and Chart 6.6 show trends in per capita personal income. To provide a basis for comparison, the numbers are also represented as a percent of the Nation’s per capita income (PCI). Between 1969 and 2000, Portage County’s PCI has remained below both the State and the Nation. After making gains in the 1970’s, the position of Portage County relative to the United States, has dropped over the last two decades. Despite these decreases relative to the U.S., the PCI in Portage County has increased somewhat when compared to the State of Wisconsin.

Table 6.4: Per Capita Income Trends

Per Capita Income	Portage County	State of Wisconsin	United States
Per Capita Income - 1970	\$3,158	\$3,983	\$4,095
Per Capita Income - 1980	\$8,736	\$10,161	\$10,183
Per Capita Income - 1990	\$15,391	\$18,152	\$19,572
Per Capita Income - 2000	\$23,602	\$28,100	\$29,469
1970 Percent of U.S. PCI	78.4%	97.5%	100.0%
1980 Percent of U.S. PCI	85.8%	99.8%	100.0%
1990 Percent of U.S. PCI	78.6%	92.7%	100.0%
2000 Percent of U.S. PCI	80.1%	95.4%	100.0%

Source: Bureau of Economic Analysis

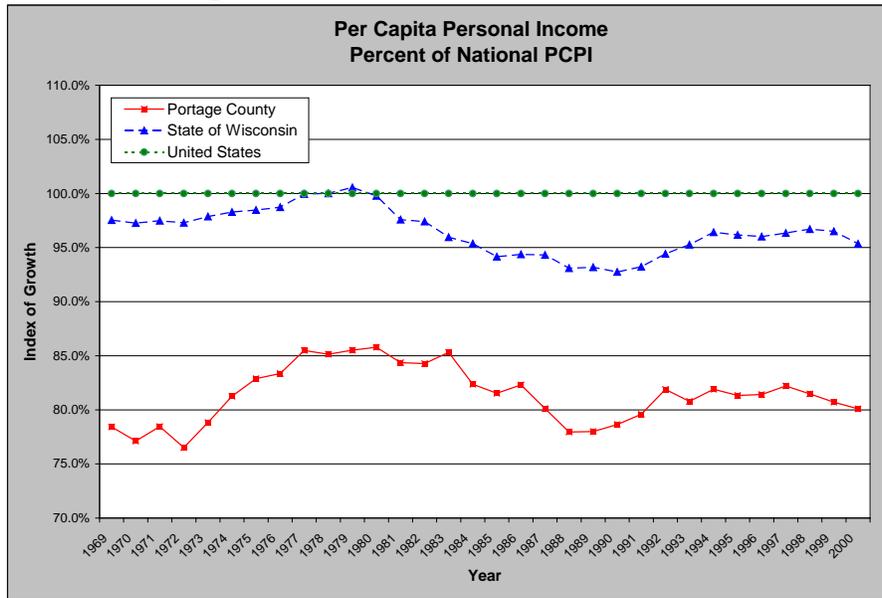
The U.S. Census Bureau reports that 8,526 (12.7%) Portage County residents were enrolled in higher-education institutions in the year 2000. The majority of these students were enrolled at the University of Wisconsin-Stevens Point and the Stevens Point campus of Mid-State Technical College. Typically, students earn less than the general working population; these students will adversely impact per capita income in Stevens Point. However, the presence of these students does not explain the erratic nature of Portage County's per capita income trend.

For instance, in Dane County, WI, 12.6% of the population is enrolled in a higher-education institution. However, Dane County's per capita income is 17% higher than the United States and 37%

higher than Portage County's PCI. Consequently, the differences in per capita income must be somewhat attributed to wages and earnings.

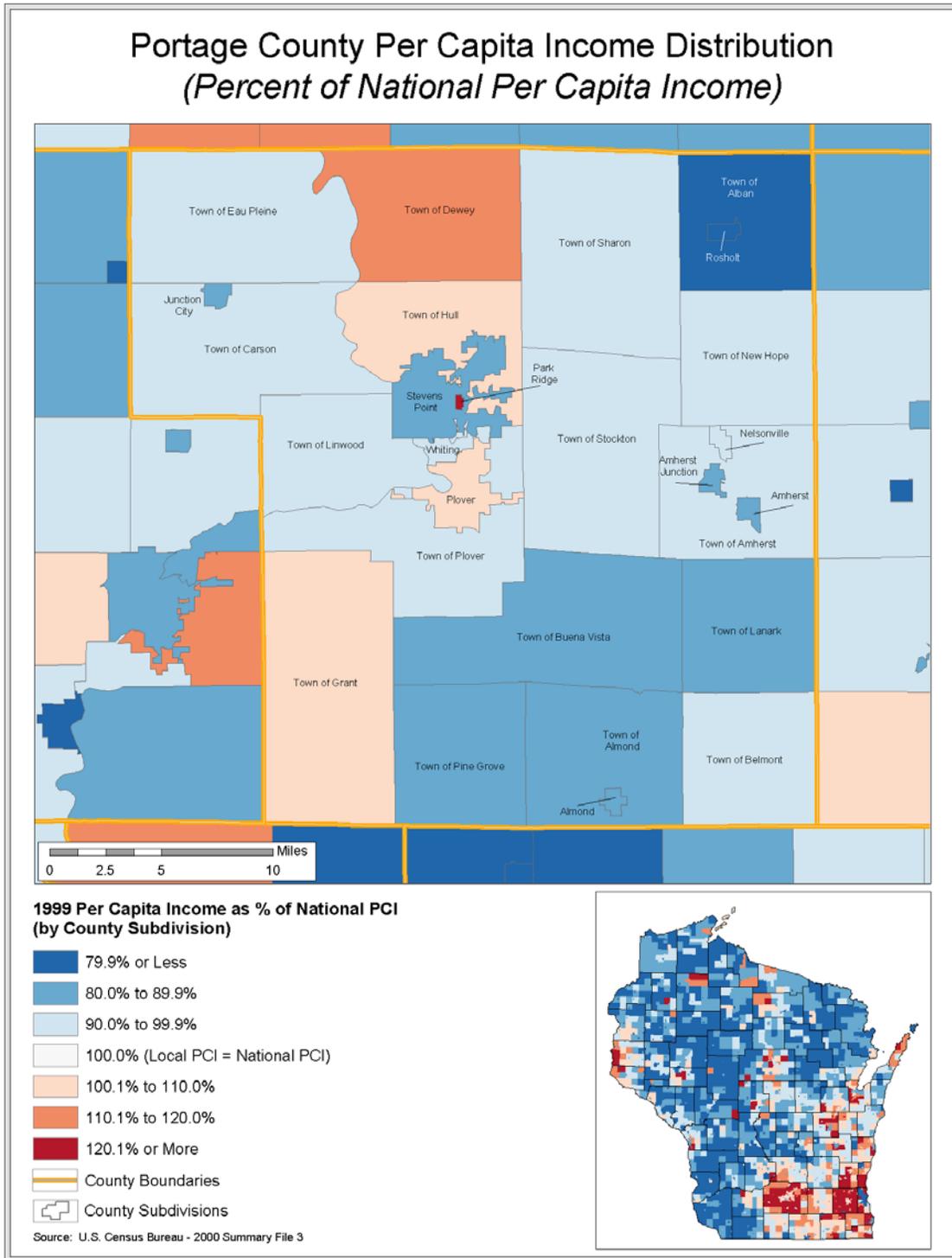
Map 6.2 depicts Portage County per capita income by county subdivision. As with the previous per capita income values, per capita incomes on the map are shown as a percentage of the national PCI. With the exception of the Town of Grant, incomes near the urban core are higher than rural per capita incomes. One notable difference is shown in Stevens Point. The lower per capita incomes in Stevens Point are likely a result of the large student population at UW-Stevens Point.

Chart 6.6: Per Capita Personal Income Trends, 1969 to 2000



Source: Bureau of Economic Analysis

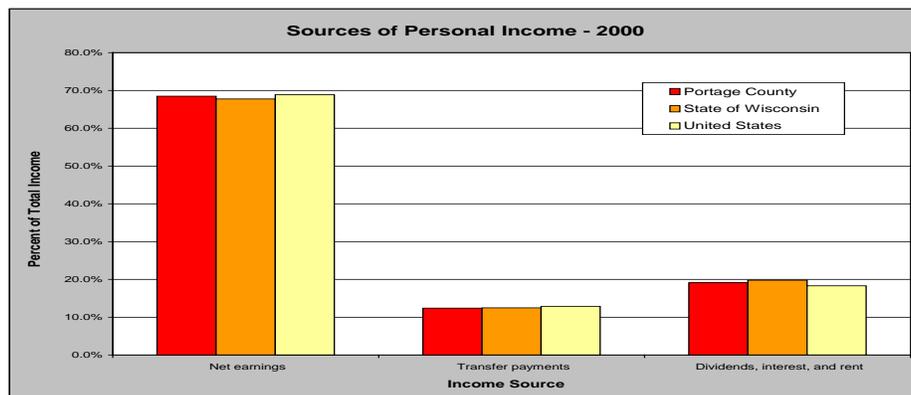
Map 6.2: Portage County Per Capita Income



B. Sources of Income

Sources of income include net earnings (wages and salary, proprietor’s income, etc.), transfer payments (income maintenance, unemployment and retirement), and income from dividends, interest and rentals. Chart 6.7 examines these three sources of income in terms of their contributions to total income. The chart shows that Portage County’s income dependence does not differ greatly from either the State or Nation in terms of distributions. Furthermore, earnings contribute the largest amount with 68.5% of Portage County’s income coming from this category. However, dividend, interest and rental income provides an important contribution with 19.1% of the total income in 2000.

Chart 6.7: Sources of Personal Income, 2000



Source: Bureau of Economic Analysis

1. Earnings Mix and Wages

Examining the percentage of jobs in each sector demonstrates the importance of each sector to the economy. However, given that different sectors may pay different wages, it does not always provide a completely accurate portrayal. Accordingly, it is important to examine how earnings in each sector contribute to the overall economy. Table 6.5 shows Portage County’s earning mix in both 1969 and 2000.

Table 6.5: Earnings Mix by Industry, 1969 and 2000

Earnings by Industry	Portage County		State of Wisconsin		United States	
	1969	2000	1969	2000	1969	2000
Total Earnings (\$000)	103,109	1,152,882	12,865,474	106,094,090	627,131,000	6,081,606,000
Farm earnings	6.6%	1.7%	5.2%	0.4%	2.9%	0.8%
Ag. services, forestry, fishing and mining	0.5%	0.8%	0.6%	0.8%	1.5%	1.5%
Construction	4.9%	4.9%	6.6%	6.6%	6.5%	6.0%
Durable Manufacturing	6.0%	5.6%	23.9%	16.0%	17.6%	9.9%
Nondurable Manufacturing	14.3%	14.3%	11.7%	9.6%	10.1%	5.8%
Transportation and public utilities	10.1%	8.9%	5.9%	5.9%	6.9%	6.8%
Wholesale trade	5.8%	6.0%	5.0%	6.1%	5.9%	6.2%
Retail trade	12.8%	9.0%	11.5%	9.0%	10.8%	8.7%
Finance, insurance, and real estate	10.4%	13.4%	4.0%	7.0%	5.3%	9.5%
Services	10.9%	18.7%	12.1%	24.3%	15.3%	29.2%
Government	17.7%	16.7%	13.5%	14.3%	17.3%	15.5%

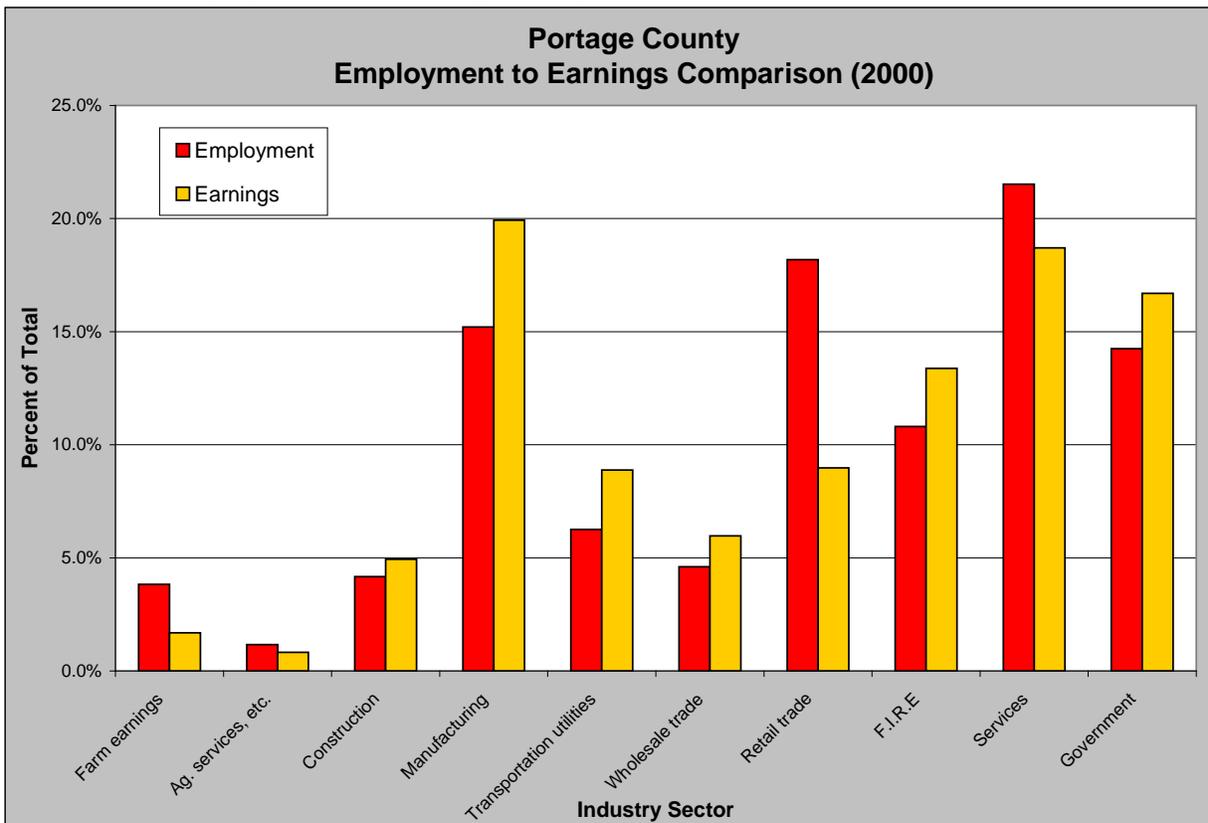
Source: Bureau of Economic Analysis

An examination of the changes reveals a number of important considerations:

- Despite the increase in manufacturing jobs, this sector contributes approximately the same amount to total earnings in 2000 as it did in 1969.
- While retail employment has increased significantly between 1969 and 2000, the retail trade sector now contributes a smaller amount to total earnings than it did in 1969.
- The finance, insurance, and real estate (F.I.R.E.) sector has grown in importance from 1969 to 2000 and contributes a larger percentage of overall earnings than either the State or the Nation.
- The percentage of earnings contributed by the services sector has risen dramatically between 1969 and 2000. However, this increase has not matched either the State of Wisconsin or the United States.
- While its percentage of overall earnings has decreased slightly, government continues to contribute a large percentage of overall earnings in Portage County.

Chart 6.8 compares the percentage of jobs in each sector to the percentage of earnings in each sector. While manufacturing has fewer jobs than either the retail or service sector, it provides the greatest percentage of overall earnings.

Chart 6.8: Employment to Earnings Comparison



Source: Bureau of Economic Analysis

Similar discrepancies exist in the F.I.R.E., transportation and government sectors. Portage County’s two largest employment sectors, retail and services, actually contribute smaller

earning percentages than they employ. The impact of these sectors' wages may provide some explanation to the lower average wage present in Portage County.

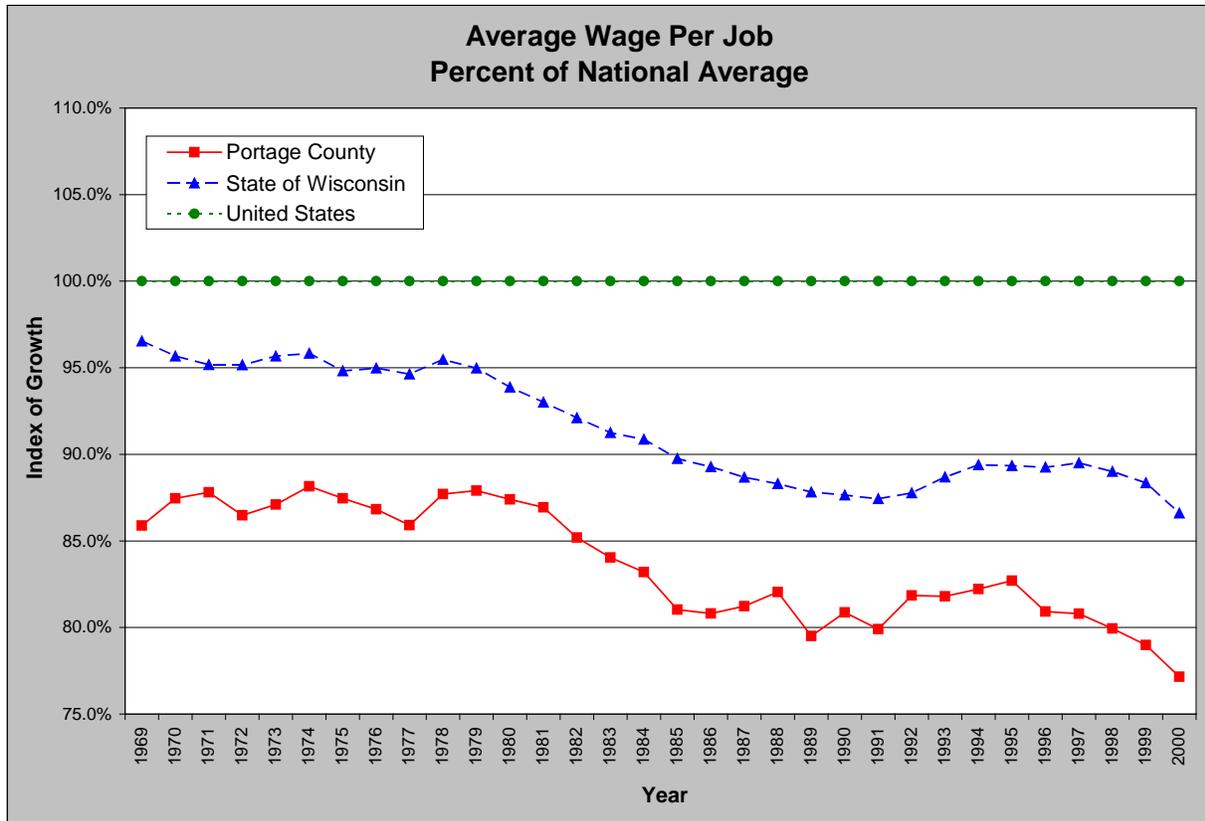
Given the importance of wages and salary, Table 6.6 and Chart 6.9 examine the change in wages from 1969 to 2000. As with per capita personal income, these wages are represented as a percent of the national average wage to provide a basis for comparison. The data shows that the average wage in both Portage County and the State have been decreasing relative to the United States. This statistic raises some questions given the previous trends in per capita income. While Portage County's per capita income has slightly increased relative to the Nation, the wages have decreased. Some possible explanations are more two income households, increased working hours or a smaller household size. Additional research is needed to confirm these differences.

Table 6.6: Average Wage per Job - 1970, 1980, 1990 and 2000

Average Wage per Job	Portage County	State of Wisconsin	United States
Avg. Wage – 1970	\$6,054	\$6,622	\$6,922
Avg. Wage – 1980	\$12,233	\$13,140	\$13,997
Avg. Wage – 1990	\$18,862	\$20,440	\$23,322
Avg. Wage – 2000	\$26,734	\$30,006	\$34,647
1970 Percent of U.S. Avg Wage	87.5%	95.7%	100.0%
1980 Percent of U.S. Avg Wage	87.4%	93.9%	100.0%
1990 Percent of U.S. Avg Wage	80.9%	87.6%	100.0%
2000 Percent of U.S. Avg Wage	77.2%	86.6%	100.0%

Source: Bureau of Economic Analysis

Chart 6.9: Average Wage per Job as Percent of National Average, 1969 to 2000



Source: Bureau of Economic Analysis

In addition to overall wages, the average wage in individual industry sectors provides additional insight into earnings and per capita personal income. Table 6.7 shows the average wage per job by industry sector (in 2002). With the exception of Agriculture, Forestry and Fishing, and Wholesale Trade, wages in Portage County are lower than the State. This trend is particularly important when considering the net job growth in the retail and service sectors. As previously shown, these sectors accounted for the largest net increases in jobs. However, at \$13,243 and \$24,501, the respective retail and service sectors are the lowest paying sectors in Portage County. Furthermore, the Portage County average wage in these two sectors is lower than the State's average wage. The large job growth in these two sectors, coupled with lower wages, partially explains the reason for Portage County's declining wages relative to the State and the Nation.

Table 6.7: Portage County Average Wage by Industry (2002)

Industry	Portage County Annual Average Wage	Wisconsin Annual Average Wage	Percent of State Average
All Industries	\$29,020	\$30,922	93.8%
Agriculture, Forestry, & Fishing	\$25,281	\$22,565	112.0%
Construction	\$30,512	\$39,011	78.2%
Manufacturing	\$33,315	\$39,739	83.8%
Transportation, Communications, & Utilities	\$34,487	\$36,639	94.1%
Wholesale Trade	\$54,741	\$40,521	135.1%
Retail Trade	\$13,243	\$14,596	90.7%
Finance, Insurance, & Real estate	\$39,247	\$40,933	95.9%
Services	\$24,501	\$28,775	85.1%
Total Government	\$33,589	\$33,785	99.4%

Source: WI DWD, Employment, Wages, and Taxes Due covered by Wisconsin's U.C. Law 2002

2. Cost of Living

Cost of living estimates are difficult to compute at the county or local level. Nevertheless, one indicator is the cost of housing. While housing costs do not explain all differences, some researchers have indicated that housing costs may explain up to 75% of cost of living variations. Accordingly, Table 6.8 examines two housing factors: median gross rent and median home value. Despite the differences shown by home values and rent, precise conclusions about cost of living should not be drawn from these numbers.

Table 6.8: Selected Housing Costs (2000)

Housing Category	Portage County	Wisconsin	United States
Median Home value	\$98,300	\$112,200	\$119,600
Percent of U.S.	82.2%	93.8%	100.0%
Median Gross Rent	\$477	\$540	\$602
Percent of U.S.	79.3%	89.7%	100.0%

Source: U.S. Census Bureau – Summary File 3

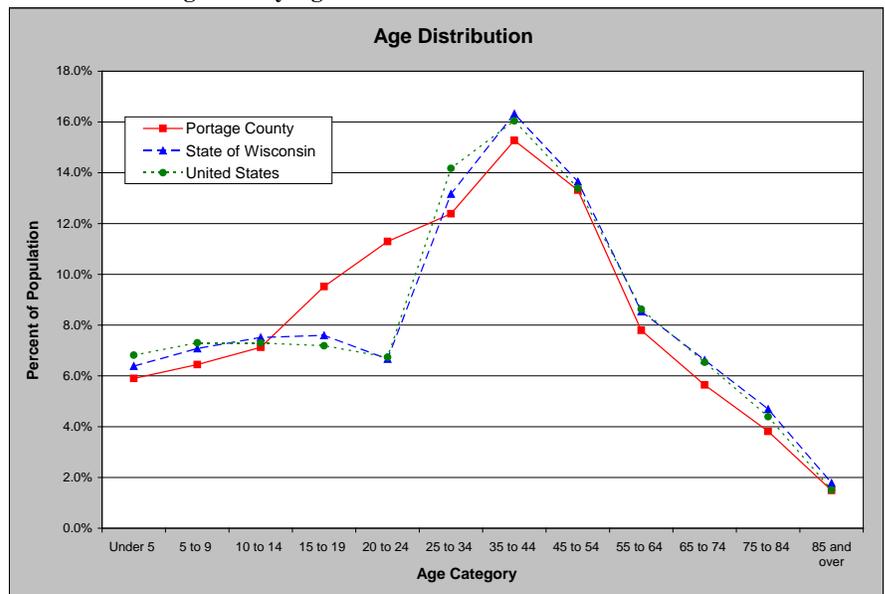
Section 6.4 Labor Force Overview

Changes in income, population and employment are all vital to understanding transformations in Portage County’s economy. However, it is also important to examine some characteristics of the labor force both affecting and being affected by these economic changes. This data recognizes that not all of Portage County’s labor force comes from County residents. Nonetheless, the following data shows that a sizeable majority of the people who work in the County also live in the County. Accordingly, the County is used as the area for analyzing the region’s labor force.

A. Age Structure

Chart 6.10 and Table 6.9 describe Portage County’s age distribution. Given the presence of UW-Stevens Point, the greater proportion of people age 15 to 19 and 20 to 24 is not surprising. The high percentage within these age groups is offset by smaller proportions in ages 14 and under and ages 55 and over. Given these age distributions, Portage County has a higher percentage of people between the traditional working ages of 15 and 64. Portage County has 69.6% of its population in this age bracket while the State has 65.9% and the Nation has 66.2%.

Chart 6.10: Portage County Age Distribution



Source: U.S. Census Bureau – Summary File 1

Age is a particularly relevant issue to labor markets that depend on a large proportion of baby-boomers. In the year 2000, these workers would have been between the ages of 35 to 54. In Portage County this age segment comprises the largest part of the labor force. However, this age segment comprises a smaller percentage of the labor force than either the State or the Nation. This smaller percentage might suggest that Portage County could require fewer young workers to replace future retirements.

Table 6.9: Portage County Age Distribution, 2000

Age Category	Portage County		State of Wisconsin		United States	
	Number	Percent	Number	Percent	Number	Percent
Under 5 years	3,964	5.9%	342,340	6.4%	19,175,798	6.8%
5 to 9 years	4,331	6.4%	379,484	7.1%	20,549,505	7.3%
10 to 14 years	4,787	7.1%	403,074	7.5%	20,528,072	7.3%
15 to 19 years	6,394	9.5%	407,195	7.6%	20,219,890	7.2%
20 to 24 years	7,589	11.3%	357,292	6.7%	18,964,001	6.7%
25 to 34 years	8,322	12.4%	706,168	13.2%	39,891,724	14.2%
35 to 44 years	10,261	15.3%	875,522	16.3%	45,148,527	16.0%
45 to 54 years	8,945	13.3%	732,306	13.7%	37,677,952	13.4%
55 to 64 years	5,235	7.8%	457,741	8.5%	24,274,684	8.6%
65 to 74 years	3,791	5.6%	355,307	6.6%	18,390,986	6.5%
75 to 84 years	2,565	3.8%	251,621	4.7%	12,361,180	4.4%
85 years and over	998	1.5%	95,625	1.8%	4,239,587	1.5%

Source: U.S. Census Bureau – Summary File 1

B. Worker Flow by Community

Portage County’s labor force is mobile. Increasingly, workers live and work in different communities. Table 6.10 shows the number of residents that live and work in the same community. With the exception of Stevens Point, every community in Portage County has less than 30% of its residents working in the same community. The data shows that economic opportunities in different communities often have impacts beyond their borders. This exchange of workers should be considered when planning the locations of new economic opportunities in Portage County.

Table 6.10: Workers Living and Working in the Same Community, 2000

Community Name	Number of Employed Residents	Number of Residents Living and Working in Same Community	Percent of Residents Living and Working in Same Community
Stevens Point city	12,286	8,862	72.1%
Almond village	203	58	28.6%
Nelsonville village	99	27	27.3%
Pine Grove town	366	94	25.7%
Junction City village	182	44	24.2%
Amherst village	522	125	23.9%
Rosholt village	281	63	22.4%
Alban town	406	84	20.7%
Plover village	6,023	1,176	19.5%
Almond town	373	71	19.0%
Amherst town	742	141	19.0%
Carson town	747	122	16.3%
Whiting village	847	130	15.3%
Park Ridge village	253	38	15.0%
Buena Vista town	663	98	14.8%
Stockton town	1,635	226	13.8%
Sharon town	1,123	154	13.7%
New Hope town	381	52	13.6%
Plover town	1,174	154	13.1%
Eau Pleine town	463	60	13.0%
Belmont town	304	39	12.8%
Amherst Junction village	139	17	12.2%
Dewey town	560	50	8.9%
Lanark town	720	60	8.3%
Linwood town	643	49	7.6%
Grant town	1,046	68	6.5%
Hull town	2,907	154	5.3%
Grand Total	35,088	12,216	34.8%

Source: U.S. Census Bureau – 2000 MCD-to-MCD Worker Flow File

C. Worker Flow by County

Portage County operates in a regional economy. In addition to workers living and working in different communities, people often work and live in different counties. More specifically, in 2000 approximately 81% of Portage County’s working population both lived and worked in Portage County. However, in 1990 Portage County retained almost 87% of its workers. These percentages suggest a change in the Portage County economy. In 1990, Portage County was a net importer of workers. That is, more workers came to work in Portage County than lived in the County. In the year 2000 this trend shifted, as over 1,000 additional workers left the County for

jobs than came into the County. As a result, Portage County became a net exporter of labor in 2000.

Table 6.11: Portage County Worker Flow, 1990 and 2000

Worker Category	1990	2000	Numeric Change 1990 - 2000	Percent Change 1990 - 2000
Number of Workers Living in Portage County	29,496	35,088	5,592	19.0%
Workers Both Living and Working Portage County	25,644	28,431	2,787	10.9%
Worker Outflow	3,852	6,657	2,805	72.8%
Number of People Working in Portage County	29,887	34,028	4,141	13.9%
Worker Inflow	4,243	5,597	1,354	31.9%
Net Worker Inflow/Outflow	391	-1,060	-1,451	-371.1%

Source: U.S. Census Bureau – 2000 County-to-County Worker Flow File

D. Commuting Times

Commuting time is an indication of job and worker distribution. Accordingly, it has a number of economic and land use planning implications. Table 6.12 provides data on commuting time for Portage County workers in each direction. The data shows that workers living in Portage County have had shorter average commuting times than either the State or the Nation. However, average commute times for Portage County workers have increased almost 3 minutes each way over the last decade. While commuting times remain shorter, they are increasing at a faster rate than those in the State. In fact, the average Portage County worker spent ~25 additional hours per year commuting in 2000 than in 1990.

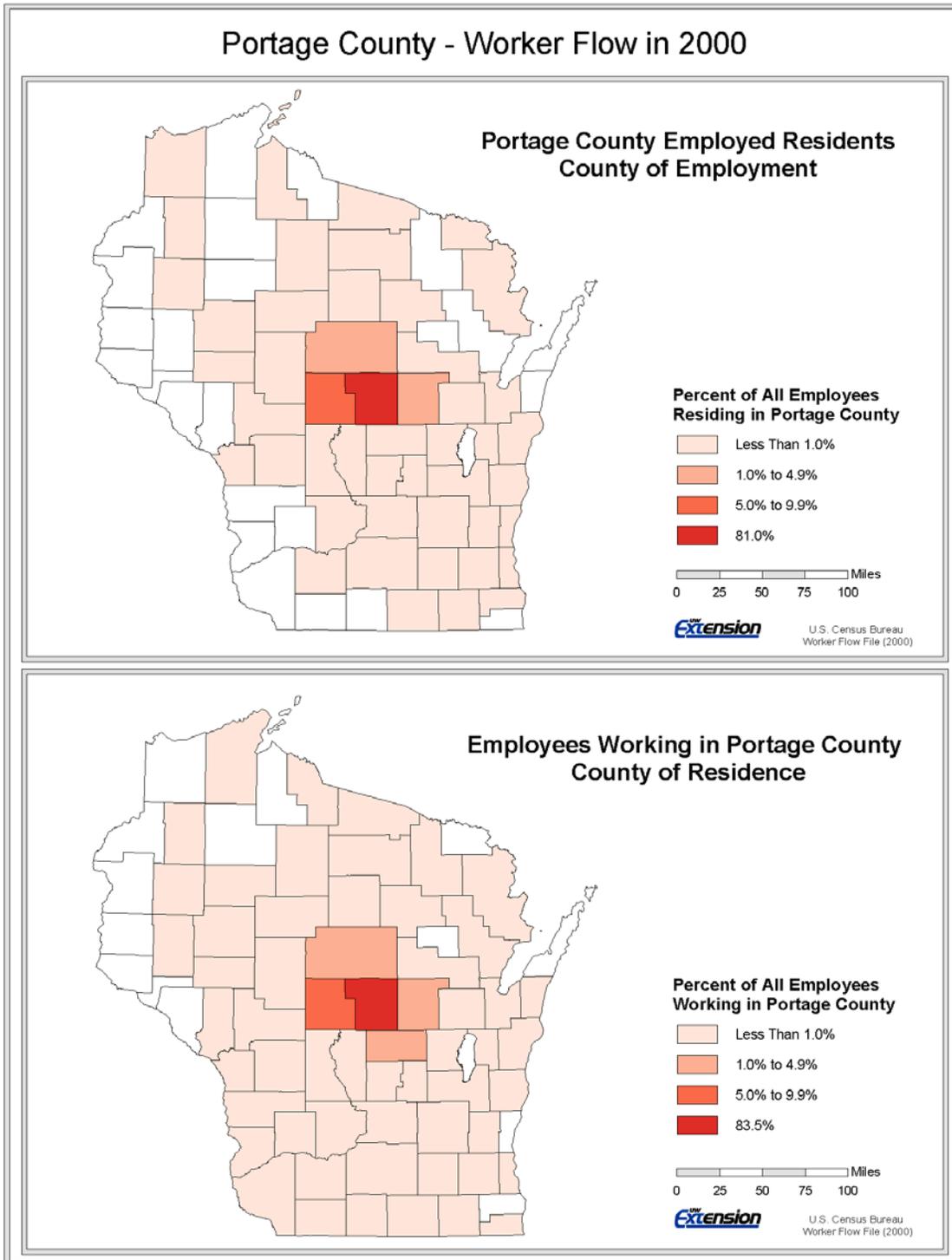
Table 6.12: Portage County Commuting Times, 2000

Commuting Time – Workers Age 16 and Over	Portage County		State of Wisconsin		United States	
	Number	Percent	Number	Percent	Number	Percent
Workers Age 16 and Over	35,088	N/A	2,690,704	N/A	128,279,228	N/A
Travel Less than 15 Minutes	16,414	46.8%	1,010,460	37.6%	36,486,316	28.4%
Travel 15 to 29 Minutes	11,631	33.1%	972,265	36.1%	44,806,624	34.9%
Travel 30 to 44 Minutes	3,405	9.7%	369,375	13.7%	23,703,903	18.5%
Travel 45 Minutes or more	2146	6.1%	233,209	8.7%	19,098,162	14.9%
Worked at home	1,492	4.3%	105,395	3.9%	4,184,223	3.3%
Average Commute Time (Minutes) – 2000	18.3	N/A	20.8	N/A	25.5	N/A
Average Commute Time (Minutes) – 1990	15.4	N/A	18.3	N/A	22.4	N/A
Difference (Minutes) 2000 – 1990	2.9	N/A	2.5	N/A	3.2	N/A

Source: U.S. Census Bureau – Summary File 3

Map 6.3 shows the flow of workers into and away from Portage County. Not surprisingly, Wood County shares the largest proportion of workers with Portage County. However, Marathon, Waupaca and Waushara Counties also provide workers to businesses in Portage County and employ Portage County residents. These counties that import and export labor may provide opportunities for regional economic development cooperation.

Map 6.3: Portage County Worker Flow, 2000



E.

E. Educational Attainment

When compared to the State of Wisconsin and the United States, Portage County has a similar percentage of the population with some sort of post high-school degree. Within Portage County, 30.3% of the population age 25 and over have either an associate degree, a bachelor's degree or a graduate degree. This percentage is compared to 29.9% and 30.7% in the State and Nation respectively. Given the presence of UW-Stevens Point, there is potential for having a labor force with an even greater education level. Strategies for retaining local college graduates may help in stemming the outflow of the educated, working age population.

Table 6.13: Educational Attainment of Residents Age 25 and Over, 2000

Educational Attainment (Highest Level Attained)	Portage County		State of Wisconsin		United States	
	Number	Percent	Number	Percent	Number	Percent
Population 25 years and over	40,143	N/A	3,475,878	N/A	182,211,639	N/A
Less than 9th grade	2,420	6.0%	186,125	5.4%	13,755,477	7.5%
9th to 12th grade, no diploma	3,019	7.5%	332,292	9.6%	21,960,148	12.1%
High school graduate (includes equivalency)	14,952	37.2%	1,201,813	34.6%	52,168,981	28.6%
Some college, no degree	7,572	18.9%	715,664	20.6%	38,351,595	21.0%
Associate degree	2,802	7.0%	260,711	7.5%	11,512,833	6.3%
Bachelor's degree	6,468	16.1%	530,268	15.3%	28,317,792	15.5%
Graduate or Professional degree	2,910	7.2%	249,005	7.2%	16,144,813	8.9%

Source: U.S. Census Bureau – Summary File 3

While Portage County has a similar education attainment as the State and Nation, there have been some changes over the previous 10 years. In examining net changes in education levels, Portage County has actually grown at a slower rate than the State in both bachelor's and graduate degrees. In contrast, Portage County has made the largest gains relative to the State and Nation in associate degrees. Of the net changes in education level, an additional 17.1% of Portage County's change came in associate degrees. This change is in contrast to the 10.6% in the State and 7.4% nationally.

Table 6.14: Changes in Education Level, 1990 to 2000

Net Changes in Education Level	Portage County		State of Wisconsin		United States	
	Number	% of Total	Number	% of Total	Number	% of Total
Population 25 +	5,139	N/A	381,652	N/A	23,343,203	N/A
Less than 9th grade	-1,645	-32.0%	-108,737	-28.5%	-2,746,734	-11.8%
9 th -12 th grade, no diploma	-10	-0.2%	-34,918	-9.1%	-881,359	-3.8%
High school graduate	870	16.9%	54,116	14.2%	4,526,218	19.4%
Some college, no degree	2,367	46.1%	200,354	52.5%	8,571,818	36.7%
Associate degree	880	17.1%	40,534	10.6%	1,720,908	7.4%
Bachelor's degree	1,874	36.5%	154,665	40.5%	7,485,225	32.1%
Graduate/Professional deg.	803	15.6%	75,638	19.8%	4,667,127	20.0%

Source: U.S. Census Bureau – Summary File 3

F. Labor Force Participation and Unemployment

Table 6.15 depicts the size and composition of Portage County's working population. The labor force considers all people age 16 and over that are employed, unemployed or on active duty in the U.S. Armed Forces. People age 16 and over who are not members of the labor force consist mainly of students, individuals taking care of home or family, retirees, seasonal workers and institutionalized people.

In 2000, Portage County had a higher labor participation rate than either the State or the Nation. This statistic is true of both males and females in the County. One likely reason for this difference is the younger population distribution in the County. While these rates are higher, the male and female composition of the labor force does not differ greatly from Wisconsin or the United States.

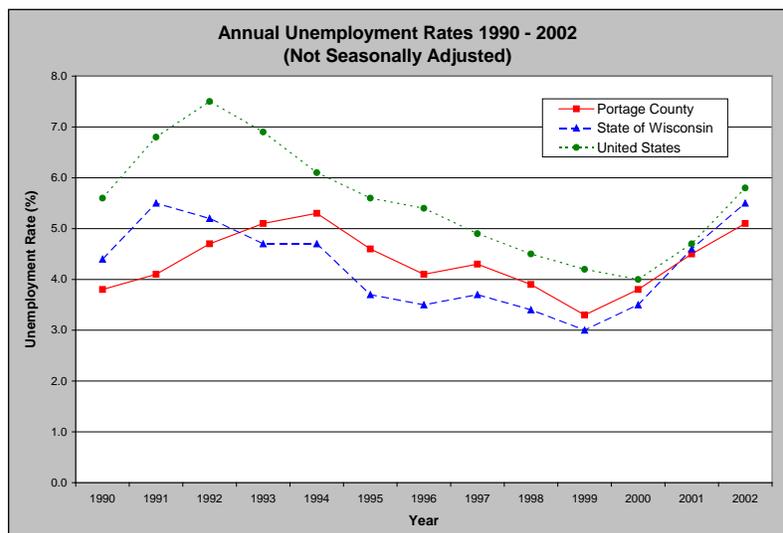
Table 6.15: Labor Force Participation, 2000

Labor Force Category	Portage County		State of Wisconsin		United States	
	Number	Percent	Number	Percent	Number	Percent
Total Population 16 and Over	53,135	N/A	4,157,030	N/A	217,168,077	N/A
Total Population in Labor Force and Overall Participation Rate	37,944	71.4%	2,872,104	69.1%	138,820,935	63.9%
Total Males Age 16 and Over	26,253	N/A	2,030,019	N/A	104,982,282	N/A
Males in labor force and Male Participation Rate	20,052	76.4%	1,508,279	74.3%	74,273,203	70.7%
Total Females Age 16 and Over	26,882	N/A	2,127,011	N/A	112,185,795	N/A
Females in Labor Force and Female Participation Rate	17,892	66.6%	1,363,825	64.1%	64,547,732	57.5%
Labor Force - Percent Male	N/A	52.8%	N/A	52.5%	N/A	53.5%
Labor Force - Percent Female	N/A	47.2%	N/A	47.5%	N/A	46.5%

Source: U.S. Census Bureau – Summary File 3

Chart 6.11 shows annual unemployment rates between 1990 and 2002. While unemployment changes monthly, an annual average provides a basis for comparison. Portage County's unemployment rate over this 12-year period has been lower than the United States. The unemployment rate in the County has also not differed dramatically from that in the State. The biggest differences were between 1993 and 2000, when the Portage County unemployment rate exceeded that of the State.

Chart 6.11: Annual Unemployment Rate 1990 to 2002



Source: Bureau of Labor Statistics Estimates

Section 6.5 Overview of Portage County Firm Distribution

A. Firm Size and Proprietors' Income

The following table describes the size of private firms in Portage County in terms of their employment. While half of the private firms in Portage County employ 1 to 4 employees, this value is slightly smaller than the distribution in the United States. While these firms employ a small number of people, they provide an opportunity for entrepreneurial growth. Additionally, these firms tend to be locally owned, suggesting that much of the income created by these firms stays in the local economy.

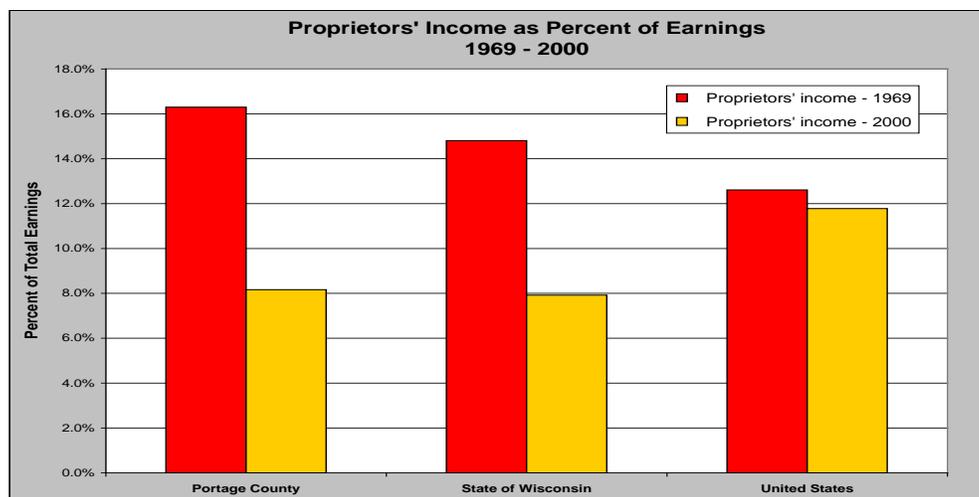
Table 6.16: Size of Portage County Private Firms, 2001

Private Firms by Employment Size	Portage County		State of Wisconsin		United States	
	Number	% of Total	Number	% of Total	Number	% of Total
Total Establishments	1,607	N/A	140,540	N/A	7,095,302	N/A
1-4 Employees	818	50.9%	71,406	50.8%	3,817,930	53.8%
5-9 Employees	322	20.0%	27,752	19.7%	1,367,420	19.3%
10-19 Employees	247	15.4%	19,536	13.9%	897,693	12.7%
20-49 Employees	143	8.9%	13,202	9.4%	620,918	8.8%
50-99 Employees	34	2.1%	4,629	3.3%	214,900	3.0%
100-249 Employees	29	1.8%	2,871	2.0%	124,913	1.8%
250-499 Employees	10	0.6%	724	0.5%	32,226	0.5%
500-999 Employees	3	0.2%	292	0.2%	12,277	0.2%
1,000 or more Employees	1	0.1%	128	0.1%	7,025	0.1%

Source: U.S. Census Bureau 2001 County Business Patterns

Chart 6.12 tracks the relative changes in proprietors' income between 1969 and 2000. Proprietors' income is an important measure as it shows the importance of smaller, locally owned businesses.

Chart 6.12: Change in Proprietors' Income, 1969 to 2000



Source: Bureau of Economic Analysis

While the percentage of smaller firms in the County is not dramatically different from the United States, the percentage of proprietors' income is much lower in Portage County. This is in contrast to the distribution in 1969 when the percentage of proprietors' income in Portage County exceeded the State and Nation. While a proportion of this change is likely due to a decrease in locally owned farms, it still represents a sizable shift.

Table 6.17 shows the fifty largest employers located in Portage County. While these individual employers may not employ a large percentage of Portage County workers, they are often the most visible. As with most counties, three of the ten largest employers are government related. However, the remaining large employers show a mix of manufacturing, retail and professional services.

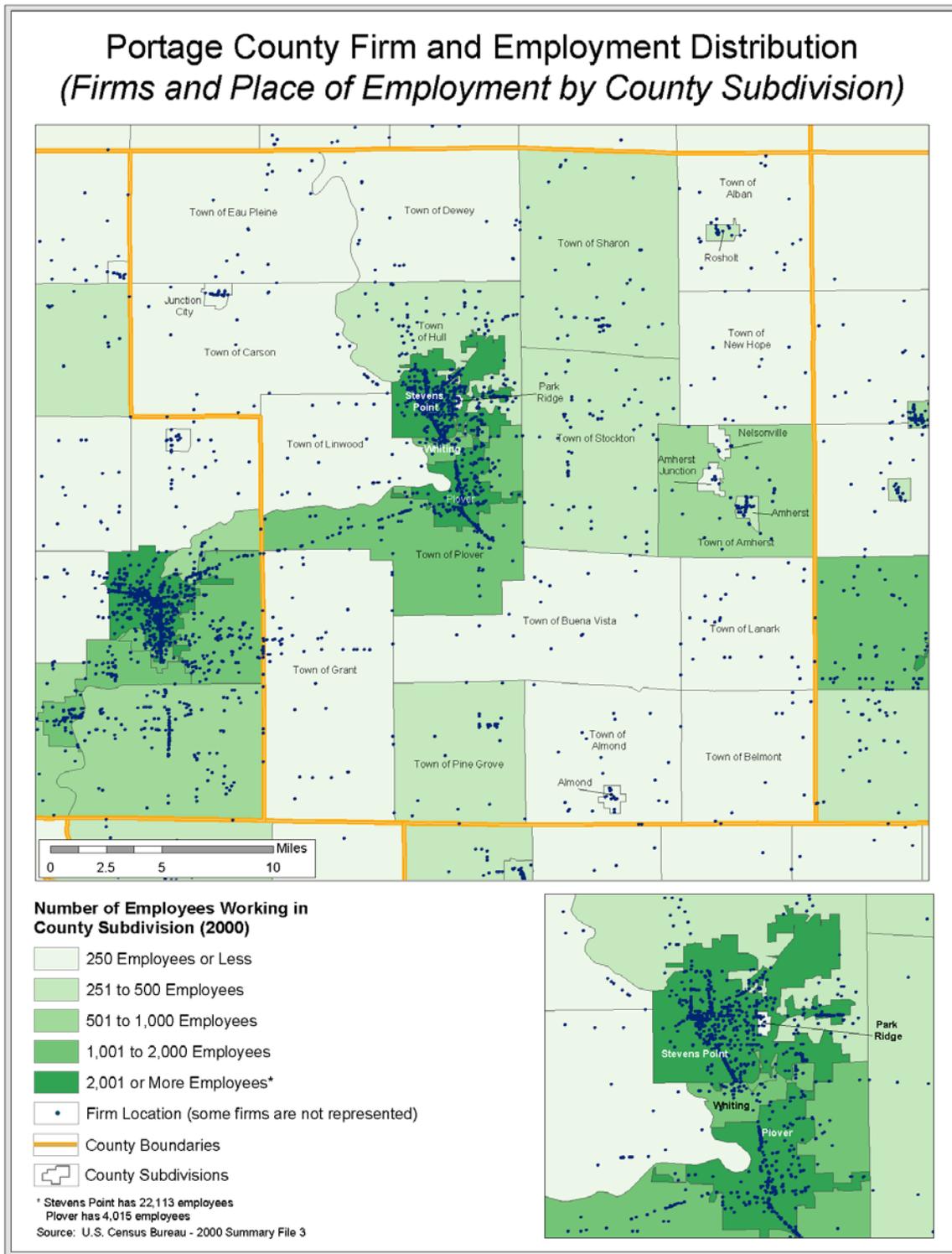
Table 1.17 – Largest 50 Employers in Portage County – Public and Private (2002)

Rank	Employer Legal Name	Product or Service	Employment Size Range
1	Sentry Insurance A Mutual Co	Fire, marine, and casualty insurance	1000+
2	Stevens Point Public School	Elementary and secondary schools	1000+
3	UW - Stevens Point	Colleges, universities, and professional schools	1000+
4	The Coppins Corp	Grocery stores	500-999
4	St. Michael's Hospital of Stevens	General medical and surgical hospitals	500-999
6	Stora Enso North America Corp	Paper mills	500-999
7	McCain Foods USA Inc.	Frozen fruits, fruit juices, and vegetables	500-999
8	County of Portage	Executive & legislative offices combined	500-999
9	Ministry Medical Group, Inc.	Offices and clinics of doctors of medicine	500-999
10	Worzalla Publishing Co	Book printing	250-499
11	Golden County Foods Inc.	Frozen fruits, fruit juices, and vegetables	250-499
12	Noel Group	Travel agencies	250-499
13	H O Wolding Inc.	Trucking, except local	250-499
14	Donaldson Co. Inc.	General industrial machinery and equipment	250-499
15	Kimberly-Clark Corp	Paper mills	250-499
16	Herschmers Inc.	Catalog and mail-order houses	250-499
17	Lands' End Inc.	Catalog and mail-order houses	250-499
18	Wal-Mart Associates Inc.	Department stores	250-499
19	City of Stevens Point	Executive & legislative offices combined	100-249
20	Sunrise Medical Hhg Inc.	Furniture and fixtures	100-249
21	Del Monte Corp	Canned fruits, vegetables, preserves, jams, and jellies	100-249
22	Shopko Stores Inc.	Department stores	100-249
23	YMCA of Stevens Point Inc.	Civic, social, and fraternal organizations	100-249
24	Compass Two LLC	Eating and drinking places	100-249
25	Figi's Mail Order Gifts, Inc.	Catalog and mail-order houses	100-249
26	Cap Services Inc.	Social services	100-249
27	Eldercare Resources Corp	Skilled nursing care facilities	100-249
28	Basic American Inc.	Dried and dehydrated fruits, vegetables, and soup mixes	100-249
29	School District of the Tomorrow	Elementary and secondary schools	100-249
30	United Parcel Service Inc.	Air courier services	100-249
30	Associated Bank NA	National commercial banks	100-249
32	Rause Management Inc.	Eating and drinking places	100-249
33	Gah Human Resources Inc.	Hotels and motels	100-249
34	Pointe Precision LLC	Aircraft parts and auxiliary equipment	100-249
35	Wisconsin Hospitality Group LLC	Eating and drinking places	100-249
36	Menard, Inc.	Lumber and other building materials dealers	100-249
37	Skyward Inc.	Computer programming services	100-249
37	Rosholt School District	Elementary and secondary schools	100-249
39	Delta Dental Plan of Wisconsin Inc.	Hospital and medical service plans	100-249
40	Community Industries Corp	Job training and vocational rehabilitation services	100-249
41	Target Corporation	Department stores	100-249
42	Schierl Inc.	Tires and tubes	100-249
43	Treb Inc.	Eating and drinking places	100-249
44	Scaffidi Motors Inc.	Motor vehicle dealers	100-249
45	Wisconsin Electric Power Co	Electric services	100-249
46	Valley Sales Corp	Commercial printing, lithographic	100-249
46	Almond-Bancroft School District	Elementary and secondary schools	100-249
48	Spee Dee Delivery Service Inc.	Courier services, except by air	100-249
49	Fulfillment Specialists of America	Help supply services	100-249
50	Village of Plover Portage County	Executive & legislative offices combined	50-99

Source: WI Department of Workforce Development

Map 6.4 depicts the distribution of Portage County firms and the number of people employed in each county subdivision. Not surprisingly, the map shows that most commercial development has occurred near the urban core, especially around major highway corridors. Lesser development exists in the rural areas, with a more notable concentration in Amherst.

Map 6.4: Portage County Firm and Employment Distribution



B. Top Private Industry Sectors by NAICS Code

Table 6.18 examines detailed industry sectors by the number of employees and establishments. It should be noted that this table comes from a different data source than the previous list of largest employers. As this data source uses employment estimates from a single week in March, there may be some differences in employment levels. Sectors with an employee range instead of a single value are listed accordingly to avoid disclosure problems. However, these industry sectors do mirror the overall industry mix presented earlier in this section.

Table 6.18: Top Private Industry Sectors by NAICS Category

Industry Code	Industry Code Description	Number of Employees	Number of Establishments
524	Insurance carriers & related activities	2,500-4,999	49
722	Food services & drinking places	2,484	166
322	Paper manufacturing	1,000-2,499	4
311	Food manufacturing	1,448	12
541	Professional, scientific & technical services	990	100
484	Truck transportation	957	62
621	Ambulatory health care services	926	73
452	General merchandise stores	857	14
813	Religious, grant making, civic, prof & like organizations	793	86
323	Printing & related support activities	778	8
522	Credit intermediation & related activities	500-999	38
622	Hospitals	500-999	1
422	Wholesale trade, nondurable goods	739	30
445	Food & beverage stores	612	27
561	Administrative & support services	603	64
551	Management of companies & enterprises	525	8
332	Fabricated metal product mfg	513	10
235	Special trade contractors	467	99
421	Wholesale trade, durable goods	454	61
441	Motor vehicle & parts dealers	449	38
444	Bldg material & garden equip & supp dealers	431	34
321	Wood product mfg	378	7
336	Transportation equipment mfg	250-499	3
624	Social assistance	250-499	42
713	Amusement, gambling & recreation industries	250-499	18
721	Accommodations	377	14
233	Building, developing & general contracting	358	88
623	Nursing & residential care facilities	347	13
454	Non-store retailers	333	21
448	Clothing & clothing accessories stores	332	38
339	Miscellaneous manufacturing	301	7
812	Personal & laundry services	292	41

Source: U.S. Census Bureau 2001 County Business Patterns

Section 6.6 Analysis of Selected Industry Sectors

This section examines selected Portage County business sectors in greater detail. Specifically, the analysis examines the consumer market for future retail demand, explores future office space needs and considers detailed impacts of industries on Portage County's current and future economy. The analyses provide information to be used in identifying and planning for commercial and industrial businesses vital to Portage County's future economy. This information is based on employment and population projections and analyses of local trends in different industry sectors.

A. Overview of Portage County Retail Trends

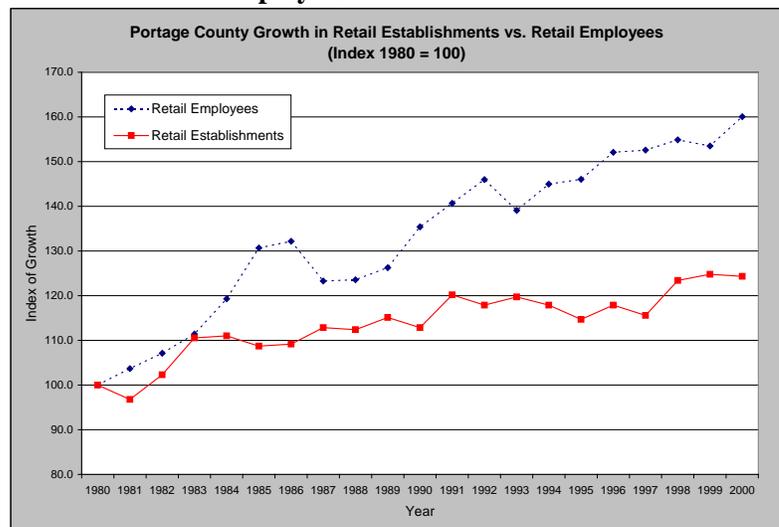
Retail contributes taxes and jobs to the Portage County economy. In addition, the availability of retail contributes to the quality of life for residents. These multiple roles of retail often make it one of the more visible industry sectors.

Portage County continues to grow as a regional retail center. Accordingly, it reflects many national retail trends. Some of these trends include an increasing number of regional and national chains, the establishment of many big box retailers and the development of retail on community fringes. While these trends provide some broad perspective, additional insight can be gained by examining changes in retail employment, retail establishments and retail sales within Portage County.

Chart 6.13 compares growth in the number of retail establishments to the growth in the number of retail employees. The trends show that both the number of retail establishments and the number of employees have grown steadily since 1980. However, the number of employees has grown at a much faster rate. While some employee growth may be attributed to firms with corporate operations in Portage County (such as Land's End and Copps), additional growth is likely due to the consolidation of retail into large establishments such as Target, Wal-Mart, and Menard's.

Table 6.19 examines changes in Portage County retail sales. These figures are based on sales as reported by Portage County businesses. As these sales are based on taxable sales, the total sales for some categories may be under reported. As many food products are not taxable, this discrepancy is particularly relevant to the Food Stores category. Due to the reporting methods used by these establishments, the retail sales data should be examined for general trends, rather than examining exact sales amounts. To maintain consistency, the 1992 values are adjusted for inflation and represented in constant 2001 dollars. Echoing the growth in retail establishments and employees, total retail sales have increased nearly 21% over the ten-year period.

Chart 6.13: Change in Portage County Retail Establishments and Employees



Source: U.S. Census Bureau and Bureau of Economic Analysis

Table 6.19: Portage County Taxable Retail Sales

Portage County Sales by Retail Category	1992 (in 2001 \$)	2001	Change 1992 - 2001
Total Retail Sales	\$416,070,795	\$502,635,640	20.8%
Building Material Stores	\$35,523,755	\$59,238,206	66.8%
General Merchandise Stores	\$57,121,555	\$71,157,964	24.6%
Food Stores	\$31,939,787	\$39,684,044	24.2%
Auto Dealers and Gasoline Service Stations	\$87,817,320	\$118,651,556	35.1%
Apparel and Accessory Stores	\$16,656,015	\$10,767,262	-35.4%
Furniture, Home Furnishings and Equipment	\$22,628,962	\$25,925,138	14.6%
Eating and Drinking Places	\$65,432,926	\$59,126,270	-9.6%
Misc. Retail Stores	\$98,950,472	\$118,085,200	19.3%

Source: WI Department of Revenue

While most retail categories experienced significant growth, sales in the Apparel and Accessory Stores category experienced a decline in constant 2001 dollars. Even though Apparel and Accessory Stores account for the smallest proportion of overall sales, the sector still experienced a significant drop in overall sales. A number of factors may have contributed to this decline. Perhaps the most significant trend over the last decade has come from consumers seeking value in clothing. The result has been a shift from clothing purchases made in dedicated clothing stores to an increasing apparel market share captured by discount retailers such as Target and Wal-Mart.

Besides Apparel and Accessory Stores, the only other category to experience a decrease in constant 2001 sales was Eating and Drinking Places. While the decline was only ~1.0% per year, this statistic is surprising given the population growth and popularity of dining out during this time period. Possible explanations include:

- Declining sales in drinking establishments or the closing of drinking establishments.
- Revised sales reporting methods of food service establishments at UW-Stevens Point or other large employers. Specifically, if cafeterias or food service establishments at these facilities were re-classified, sales may be reported in other business categories.
- Co-branding of fast-food establishments at convenience stores. Over the last decade, many fast-food establishments have located within convenience stores. Sales from these eating places may be reported under the Auto Dealers and Gasoline Service Stations category.
- The closing of any large restaurants in Portage County

Regardless of the reason behind the declining sales, the restaurant category should be analyzed in greater detail. Overall, the growth in Portage County retail sales has mirrored growth in the United States. In 2001, Portage County retail sales declined for the first time since 1994. Whether this decline will continue is difficult to determine. Given current economic trends, it could point to short-term stagnation in retail opportunities. It is likely, however, that Portage County's projected population increase will assist in creating longer term growth.

B. Retail Surplus and Leakage

Retail surplus and leakage compares actual retail sales in Portage County to the amount of estimated potential sales. If actual sales exceed potential sales, then Portage County is said to have a surplus in retail sales. A surplus in sales may indicate that Portage County is pulling

customers from surrounding counties or has a large tourism base. In contrast, if potential sales are larger than actual sales, then Portage County is said to have a leakage in retail sales. A leakage may indicate that Portage County is losing customers to surrounding retail centers. Subsequently, a leakage might indicate a potential for filling a sales gap.

Table 6.20 shows year 2001 surplus and leakage calculations for Portage County. The numbers examine overall retail sales as well as broad sub-categories of sales. Again, these numbers are based on sales tax data and should only be used to examine trends rather than specific numbers. In terms of overall sales, Portage County had a surplus of approximately \$59 million in 2001. The existence of this surplus furthers the observation that Portage County is a regional retail center and suggests that the County is attracting customers from beyond its borders.

Table 6.20: Portage County Retail Surplus and Leakage, 2001

Retail Category	Portage County Taxable Sales (2001)	Potential Sales (2001)	Surplus (Leakage)
Total Retail Sales	\$502,635,640	\$443,582,259	\$59,053,381
Building Material Stores	\$59,238,206	\$40,550,875	\$18,687,331
General Merchandise Stores	\$71,157,964	\$71,525,971	(\$368,007)
Food Stores	\$39,684,044	\$31,160,711	\$8,523,333
Auto Dealers and Gasoline Service Stations	\$118,651,556	\$110,771,106	\$7,880,450
Apparel and Accessory Stores	\$10,767,262	\$20,170,828	(\$9,403,566)
Furniture, Home Furnishings and Equipment	\$25,925,138	\$27,100,795	(\$1,175,657)
Eating and Drinking Places	\$59,126,270	\$54,422,611	\$4,703,659
Misc. Retail Stores	\$118,085,200	\$87,877,217	\$30,207,983

Source: WI Department of Revenue

The surplus and leakage values for the retail sub-categories show only three areas with a retail leakage: General Merchandise Stores, Apparel and Accessory Stores and Furniture, Home Furnishings and Equipment Stores. However, these leakages are not surprising when considering retail conditions in the Portage County region.

- The leakage in general merchandise stores is small (\$368,007). Despite the concentration of department stores in the urban core, many of the surrounding communities have general merchandise stores. Wisconsin Rapids, Marshfield, Wausau, Waupaca, Portage and Berlin all have discount department stores or traditional department stores. These stores are likely filling some needs of local residents that would otherwise travel to Portage County.
- The apparel and accessory stores category has the most sizeable leakage in Portage County and is partly a function of declines in the industry. Furthermore, Wausau and Appleton have concentrations of national apparel retailers unavailable in Portage County. Whether or not this gap points to opportunities for expansion or recruitment is not yet determined.
- The most surprising leakage is in furniture, home furnishings and equipment stores. As with apparel stores, national retailers in Wausau and Appleton may be capturing some of these sales. This gap might point to limited expansion or recruitment opportunities.

C. Overview of Retail Opportunities

Planning for future retail growth is vital to Portage County's economy. As previously mentioned retail development provides jobs, enhances the tax base and impacts the quality of life. The potential for future retail opportunities will depend on demand generated by Portage County residents and visitors. Accordingly, examining future retail opportunities requires an

understanding of current retail demand as well as demand generated by projected increases in the Portage County population. In doing so, this section summarizes retail demand based on 2000 population numbers as well as 2020 population projections. The differences in these values may point to future growth opportunities. Please see Appendix F for a more complete examination of the analysis.

1. Analysis of Community Convenience Shopping Markets

The availability of basic goods and services is an important quality of life component for communities of all sizes. Increasingly, basic necessities such as food, health care items, gasoline and basic home goods are not available in small communities. Accordingly, residents may have to travel long distances to purchase these goods and services. These basic items are often described as convenience shopping items, or items purchased based on travel times. While other factors such as commuting patterns, tourism, shopping trip chaining, price and selection do influence consumers, people often travel shorter distances for these types of goods. Accordingly, the subsequent analysis of demand for these items is based on travel times around Portage County's incorporated communities.

Calculating demand for convenience items requires knowing the convenience trade area for each community. The trade area is the geographic region that will generate the majority of customers to the community. It is noted that each individual store in a community will likely have its own trade area based on a number of factors. Furthermore, each trade area will be fluid in nature. That is, customers living outside of a trade area may travel to a given community and customers living in a trade area may shop outside of the trade area. However, for analysis purposes the trade areas constructed here provide a reasonable overall estimate for each community.

For convenience shopping analysis, drive times to a community were used as the basis for forming trade areas. Computer software was used to analyze the road network, driving times and the locations of surrounding communities in respect to small area census blocks. Each census block was assigned to a trade area based on the shortest driving distance to a given community. Repeating this analysis for each block created a unique trade area for each community in Portage County. Map 6.5 depicts the results of this analysis and shows the estimated convenience trade area boundaries.

Using the convenience trade areas, resident demand for four different convenience retail store types was examined:

- Grocery Stores
- Convenience Stores with Gasoline
- Pharmacies and Drug Stores
- Hardware Stores

These four categories were used as they provide access to most daily goods and services. Examining store types allows demand to be assessed in terms of both store square footage and dollars. This methodology is applied widely in the shopping center industry and allows communities to assess future business opportunities and possible space needs.

Map 6.5: Convenience-based Trade Areas Around Incorporated Communities

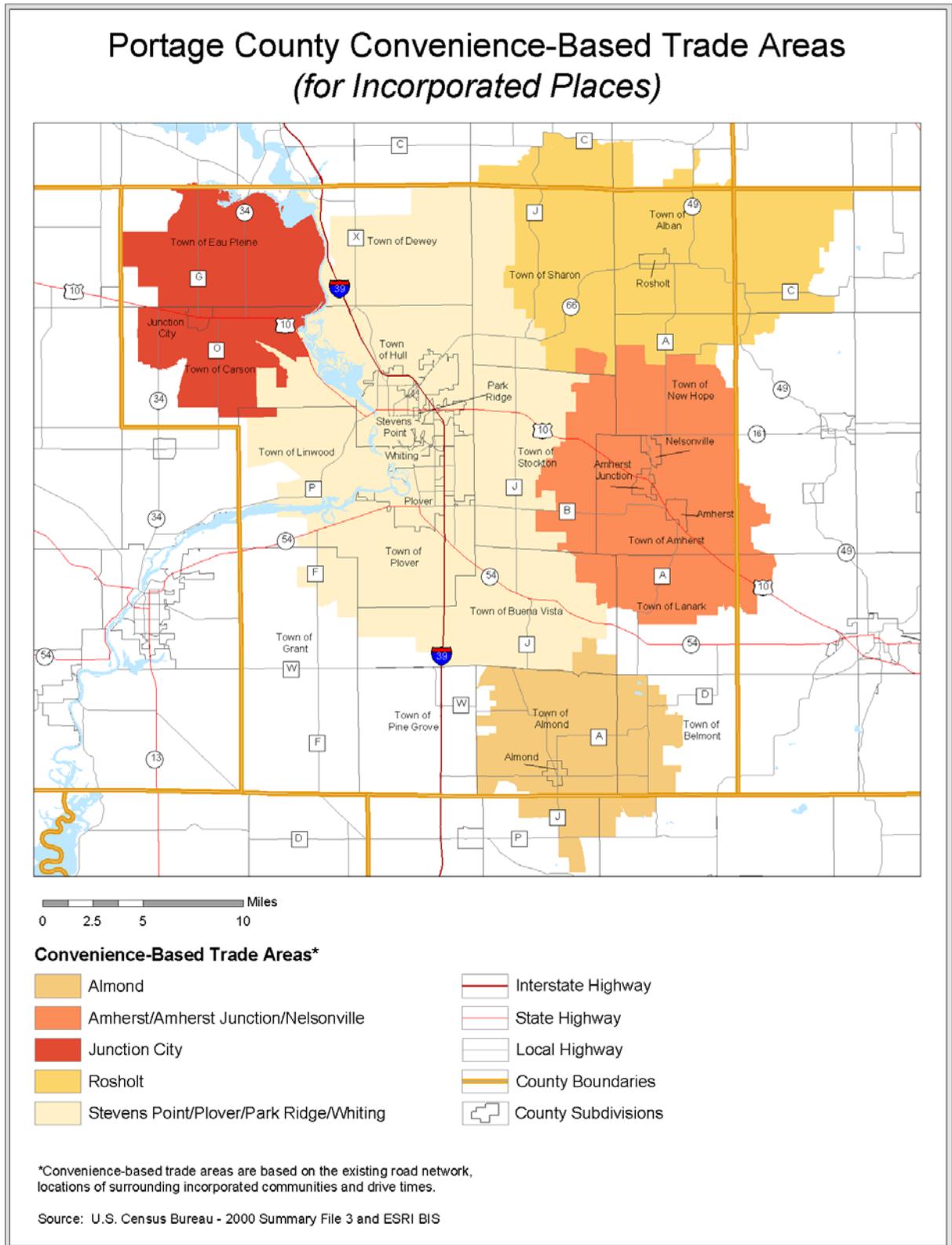


Table 6.21 contains the values used in the demand calculations for grocery stores, convenience stores, pharmacies and drug stores and hardware stores. All values are based on 1997 figures relating to the most current Economic Census. Additionally, the median size of each store type is included to provide perspective on the typical size for an individual store.

Table 6.21: Average Size, Sales and Per Capita Spending in Selected Convenience-Based Store Categories

Business Category (1997 Figures)	Median Size	Median Sales/ Sq Ft.	Average Sales/Store	WI Sales/ Per Capita
Grocery Stores	42,228	\$371.79	\$5,925,017	\$1,387
Convenience Stores	2,508	\$339.01	\$1,742,262	\$ 651
Pharmacies and Drug Stores	11,153	\$247.29	\$2,274,338	\$ 319
Hardware Stores	7,857	\$121.08	\$ 984,945	\$ 84

Source: U.S. Census Bureau and ULI Dollars and Cents of Shopping Centers

Tables 6.22 to 6.26 report the year 2000, 2010 and 2020 convenience demand calculations for each community trade area. Due to their proximity to each other, the communities of Amherst, Amherst Junction and Nelsonville are combined into one trade area and table. For similar reasons, the urban core of Stevens Point, Plover, Whiting and Park Ridge is combined into one trade area. However, a number of convenience centers do exist within the overall urban core.

It should be noted that these calculations are only based on resident spending patterns. There are several additional factors, such as commuting patterns and local consumer behavior and preferences that are not included in these calculations. Furthermore, these figures must be reconciled with the existing retail supply in each community. Accordingly, these values should only be used for general planning purposes. All calculations are reported in constant year 1997 dollars.

Table 6.22: Portage County Urban Core Convenience Trade Area Demand

Year	2000		2010		2020	
Population	50,616		56,306		61,159	
Demand	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft
Grocery Store Demand	57,375,853	154,323	64,111,125	172,439	69,950,716	188,146
Convenience Store Demand	30,894,690	91,132	34,521,375	101,830	37,665,770	111,105
Pharmacy Demand	15,138,873	61,219	16,916,004	68,406	18,456,806	74,636
Hardware Store Demand	3,986,412	32,924	4,454,371	36,789	4,860,099	40,140

Urban Core = Stevens Point/Plover/Whiting/Park Ridge

Table 6.23: Almond Convenience Trade Area Demand

Year	2000		2010		2020	
Population	1,548		1,565		1,663	
Demand	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft
Grocery Store Demand	1,628,781	4,381	1,646,289	4,428	1,750,075	4,707
Convenience Store Demand	877,036	2,587	886,463	2,615	942,348	2,780
Pharmacy Demand	429,761	1,738	434,381	1,757	461,765	1,867
Hardware Store Demand	113,166	935	114,382	945	121,593	1,004

Table 6.24: Amherst/Amherst Junction/Nelsonville Convenience Trade Area Demand

Year	2000		2010		2020	
Population	5,183		5,727		6,414	
Demand	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft
Grocery Store Demand	5,738,744	15,435	6,341,616	17,057	7,101,502	19,101
Convenience Store Demand	3,090,093	9,115	3,414,717	10,073	3,823,886	11,280
Pharmacy Demand	1,514,193	6,123	1,673,264	6,766	1,873,763	7,577
Hardware Store Demand	398,722	3,293	440,609	3,639	493,405	4,075

Table 6.25: Rosholt Convenience Trade Area Demand

Year	2000		2010		2020	
Population	3,829		3,261		3,500	
Demand	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft
Grocery Store Demand	3,996,438	10,749	3,403,089	9,153	3,652,930	9,825
Convenience Store Demand	2,151,928	6,348	1,832,432	5,405	1,966,962	5,802
Pharmacy Demand	1,054,478	4,264	897,920	3,631	963,842	3,898
Hardware Store Demand	277,668	2,293	236,443	1,953	253,802	2,096

Table 6.26: Junction City Convenience Trade Area Demand

Year	2000		2010		2020	
Population	1,926		1,940		1,888	
Demand	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft	Dollars (\$)	Sq Ft
Grocery Store Demand	2,252,995	6,060	2,269,945	6,105	2,209,052	5,942
Convenience Store Demand	1,213,151	3,579	1,222,278	3,605	1,189,490	3,509
Pharmacy Demand	594,463	2,404	598,935	2,422	582,868	2,357
Hardware Store Demand	156,536	1,293	157,713	1,303	153,483	1,268

Sources for Tables 6.22 – 6.26: UW-Extension, Portage County Planning Department, U.S. Census Bureau and ULI

The following discussion summarizes the convenience market calculations by community. Again, these numbers and conclusions are based solely on resident demand in the area. If sufficient demand can be generated by visitors, transient customers or other sources, additional opportunities may exist. *Given these unknowns, these numbers are only for general planning purposes. Additional investigation of convenience opportunities requires a market analysis and feasibility study.*

Portage County Urban Core – The Portage County urban core has the greatest potential for future convenience based retail. This area has the greatest potential to attract customers from outlying areas and is projected to have the largest growth between 2000 and 2020. However, the urban core also represents the largest number of competitors. Given these potential opportunities, convenience-based opportunities should be examined in greater detail.

Almond – In comparing existing demand to the average sales needed by these four retail store categories, there is limited opportunity for expansion in Almond. While the area around Almond is projected to grow slightly between 2000 and 2020, this growth likely will generate limited additional demand. If a convenience store does not exist in Almond, this may represent the best opportunity for providing goods and services. If a convenience store does exist, there may be additional profit centers represented by these convenience goods.

Amherst/Amherst Junction/Nelsonville - In comparing existing demand to the average sales needed by stores in the four retail categories, there may be opportunities for convenience businesses in the Amherst/Amherst Junction/Nelsonville area. The current and future demand in the area might be sufficient to support several convenience-based retailers. However, specific opportunities will depend on existing supply and additional market factors in these communities. Furthermore, the enhancements to Highway 10 may improve accessibility to the urban core and draw residents away from the area. Accordingly, convenience opportunities in the Amherst area should be examined in greater detail.

Rosholt – In comparing existing demand to the average sales needed by stores in the four retail categories, there is limited opportunity for expansion in Rosholt. The area has a larger population base than either Almond or Junction City. The current demand may represent opportunities for existing businesses to expand into new convenience goods and services. However, population around Rosholt is projected to decline somewhat between 2000 and 2020. If these projections become a reality, it will be more difficult to convince retailers to locate in a shrinking market.

Junction City – Similar to Almond, a comparison of existing demand to the necessary sales shows limited opportunity for convenience-based retail in Junction City. This problem is compounded by a projected decrease in the population base surrounding Junction City. If a convenience store does not exist in Junction City, this may represent the best opportunity for providing goods and services. If a convenience store does exist, there may be additional profit centers represented by these convenience goods.

2. Analysis of the Portage County Destination Shopping Market

The following analysis examines the resident demand for destination shopping in Portage County. While convenience-based items are purchased based on travel distance, destination purchases are based on price, selection, quality and style. Consumers purchase these items less frequently than convenience items and are often willing to travel longer distances for them. Given the nature of these purchases, consumers are often drawn to areas with a critical mass of stores or large individual stores. This critical mass and the availability of large retailers are concentrated around Stevens Point and Plover. Accordingly, the following analysis uses Portage County's urban core of Steven's Point/Whiting/Plover area as the primary shopping attraction.

To determine resident demand for destination goods, a trade area was constructed around the urban core. For destination shopping, the trade area represents the geographic area that will generate the majority (typically ~70%) of customers to the urban core. This trade area is used instead of the Portage County boundary as potential customers are not restricted by these borders. Consequently, using the County boundary may either overestimate or underestimate resident spending potential. The trade area was constructed using the following criteria:

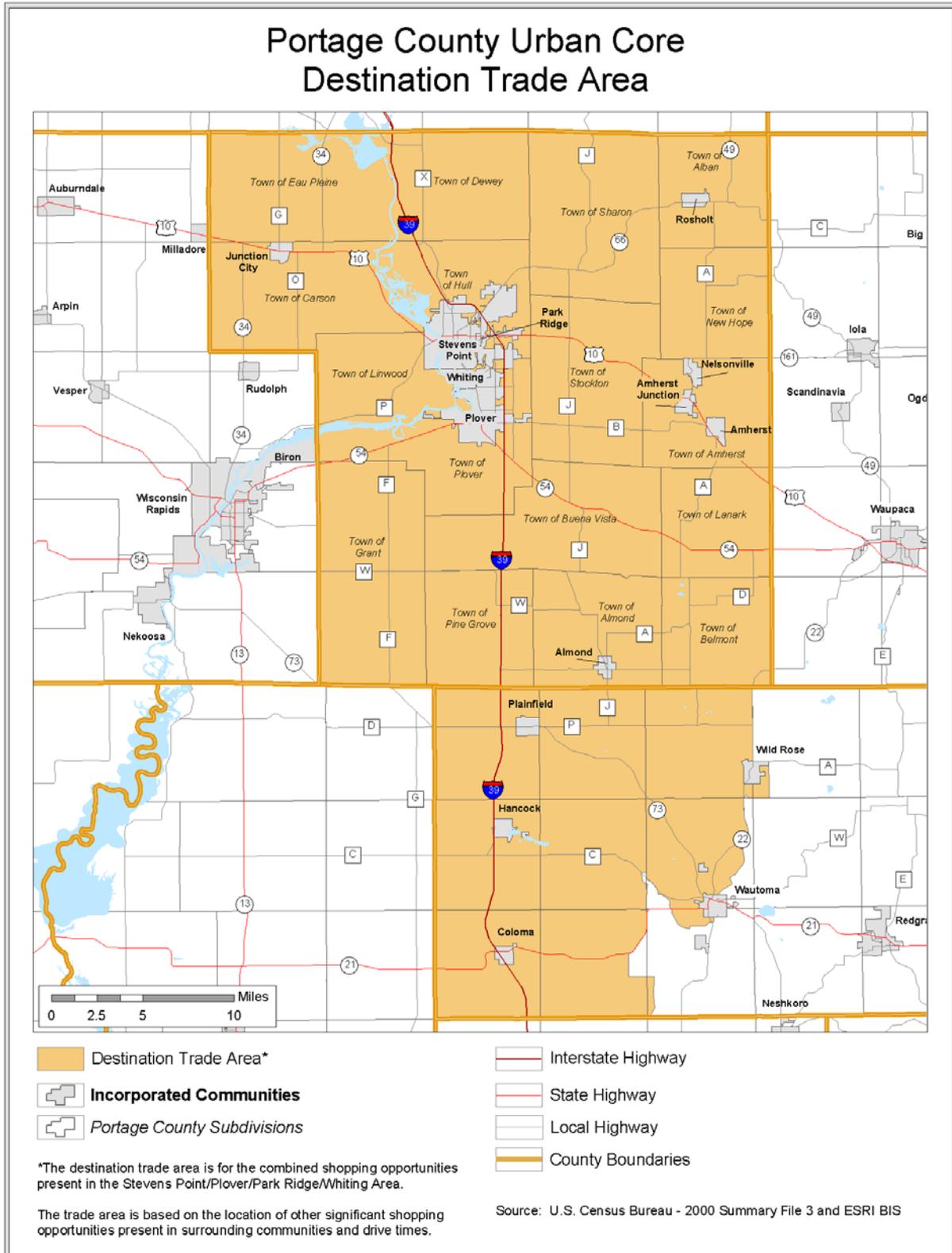
- The availability of destination shopping opportunities in Portage County and surrounding communities. The analysis used opportunities in the urban core including the I-39 corridor in Plover, Downtown Stevens Point, and the Highway 10 commercial strip in Stevens Point. Furthermore, the analysis considered opportunities in larger communities such as Wausau, Appleton and Wisconsin Rapids and big box shopping opportunities in smaller communities such as Waupaca, Portage and Berlin.
- The size of the community with destination shopping opportunities. The analysis recognizes that larger communities will likely attract customers from longer distances.
- Travel times from customer residences to shopping opportunities. While travel time is not as important for destination purchases, it still contributes to consumer choices.

Based on a computer analysis of the preceding criteria, the following map depicts the calculated destination trade area around the Portage County urban core. The trade area includes all of Portage County as well as a portion of northern Waushara County. The presence of shopping opportunities in Wisconsin Rapids to the west, Wausau to the north, Portage to the south and Appleton to the east constricts the trade area in other directions. Furthermore, smaller communities to the east contain other shopping opportunities that will affect shopper travel patterns somewhat.

It should be noted that the calculated trade area is fluid in nature. That is, customers within the trade area may still travel to other areas to shop and customers from outside the trade area may travel to the Portage County urban core. Furthermore, each individual store within the Portage County urban core will have its own trade area. Given these caveats, the overall trade area defined here is used to examine future development opportunities on a general

basis. Map 6.6 shows the estimated destination trade area. Again, the trade area estimated on the map only represents those areas that are the most likely to spend the majority of their dollars within Portage County's urban core.

Map 6.6: Destination Trade Area for Portage County Urban Core



Trade area demographics

Trade area demographics assist in explaining consumer preferences and demand. While the demographics of the Destination Trade Area are not dramatically different from the surrounding counties, (Adams, Marathon, Shawano, Waupaca, Waushara and Wood) there are a number of smaller differences that point to important consumer groups. Most of these smaller differences can be attributed to the presence of the student population in Stevens Point. These students impact the age distribution, income, household composition, housing tenure and mobility rates. Accordingly, the student population could represent an important consumer segment and provide additional retail opportunities unavailable to communities in surrounding counties. This niche market should have a role in the future retail development strategy for the urban core.

Destination Trade Area Residential Consumer Classification and Lifestyle Segmentation

An analysis of demographics can provide basic information about consumers in the trade area. However, the trade area residents can be examined in greater detail by examining lifestyle segmentation information. Lifestyle segmentation systems examine the populations buying habits and preferences. One specific lifestyle segmentation system, ACORN™ (A Classification of Residential Neighborhoods), was purchased from ESRI Business Solutions to provide useful information about households in the destination trade area. ACORN data is available for individual neighborhoods throughout the entire country. Consumers are classified into 43 demographic and behaviorally distinct clusters. The clusters are based on type of neighborhood (urban, suburban, rural); the residents socio-economic status (age, income, occupation, type and value of residence); and their buying behaviors and preferences. ACORN data is updated annually using various national and local data sources.

Analysis of Destination Trade Area Retail Demand

The following analysis examines retail demand for 10 broad retail store types. As with the convenience market analysis, an alternative to estimating demand by store types would be to calculate demand by product type. That is, demand for clothing purchased anywhere (discount store, clothing store, etc.) could be calculated instead of calculating demand for clothing stores. However, examining store types allows demand to be assessed in terms of specific business types. Again, these results can be used in examining future business opportunities and possible space needs. These numbers only examine demand generated by residents and there are additional factors that need to be considered before precise conclusions can be made.

The demand numbers presented in the following tables are calculated at the three-digit NAICS level and are shown in *constant 1997 dollars*. While demand can be estimated using more specific store types, it is difficult to project demand distribution for these specific store types. For instance, the broad Building Material and Garden Equipment and Supplies Dealers (NAICS 444) category includes five more specific store types:

- Home centers (NAICS 44411)
- Paint and wallpaper stores (NAICS 44412)
- Hardware stores (NAICS 44413)
- Other building material dealers (NAICS 44419)
- Outdoor power equipment stores (NAICS 44421)
- Nursery and garden centers (NAICS 44422)

Using a similar methodology, demand for each of these specific store types could be estimated. However, one large home center could capture significant demand from these other store types and possibly preclude their development. To avoid these potential conflicts, only broad retail demand estimates are included.

As previously stated, future potential is examined by comparing current demand to the future demand created through population growth. These calculations assume that the current market is efficient and that no demand gaps exist. However, it is possible that current demand gaps do exist in some retail categories. These gaps may provide additional opportunities for retail development. In contrast, some categories may have an oversupply that could reduce future potential. Accordingly, these numbers are only to be used for general planning purposes and precise conclusions should not be drawn from this analysis. *Analysis of specific opportunities should include a detailed market analysis that reconciles supply and demand, an analysis of the considerations listed below, and a complete feasibility study.*

- Quality of existing competitors - Are existing stores in this category providing the merchandise and service local shoppers demand?
- Competition from outside the trade area - Do surrounding communities with regional shopping centers and big box stores siphon business in this category out of the trade area?
- Demand from non-residents such as tourists and commuters.
- Demographic and lifestyle information affecting individual store categories (i.e. college students).
- Survey and focus group findings regarding shopping preferences.
- Demand from business-to-business sales.

Motor Vehicle and Parts Dealers (NAICS 441) and Gasoline Stations (NAICS 447)

Industries in the Motor Vehicle and Parts Dealers sub-sector retail motor vehicle and parts merchandise from fixed point-of-sale locations. Establishments in this sub-sector typically operate from a showroom and/or an open lot where the vehicles are on display. The display of vehicles and the related parts require little by way of display equipment. The personnel generally include both the sales and sales support staff familiar with the requirements for registering and financing a vehicle as well as a staff of parts experts and mechanics trained to provide repair and maintenance services for the vehicles. Specific industries have been included in this sub-sector to identify the type of vehicle being retailed.

Industries in the Gasoline Stations sub-sector group establishments retailing automotive fuels (e.g., gasoline, diesel fuel, gasohol) and automotive oils and retailing these products in combination with convenience store items. These establishments have specialized equipment for the storage and dispensing of automotive fuels.

Based on population projections, Table 6.27 shows that the Portage County Destination Trade Area has the potential to generate an additional \$50 million in resident demand for these retail sub-sectors. It should be noted that much of this demand will likely be generated in the new car dealer category (given the large ticket nature of automobiles). This additional demand could generate new dedicated or expanded business opportunities. However, the exact potential for specific types of new business will depend on both current supply and the other considerations noted above.

Table 6.27: Destination Trade Area Demand for NAICS 441 and NAICS 447

NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
441	Motor vehicle & parts dealers	\$181,656,915	\$219,674,482	\$38,017,567
447	Gasoline stations	\$60,156,842	\$72,746,601	\$12,589,759

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

Furniture and Home Furnishings Stores (NAICS 442) and Electronics and Appliance Stores (NAICS 443)

Industries in the Furniture and Home Furnishings Stores sub-sector retail new furniture and home furnishings merchandise from fixed point-of-sale locations. Establishments in this sub-sector usually operate from showrooms and have substantial areas for the presentation of their products. Many offer interior decorating services in addition to the sale of products.

Industries in the Electronics and Appliance Stores sub-sector retail new electronics and appliance merchandise from point-of-sale locations. These establishments often operate from locations that have special provisions for floor displays requiring special electrical capacity to accommodate the proper demonstration of the products. The staff includes sales personnel knowledgeable in the characteristics and warranties of the line of goods retailed and may also include trained repair persons to handle the maintenance and repair of the electronic equipment and appliances. The classifications within this sub-sector are made principally on the type of product and knowledge required to operate each type of store.

Based on population projections, Table 6.28 shows that the Portage County Destination Trade Area has the potential to generate an additional \$7.3 million in resident demand for these retail sub-sectors. This additional demand could generate new dedicated or expanded business opportunities. The exact potential for specific types of new business will depend on both current supply and the other considerations noted above.

Table 6.28: Destination Trade Area Demand for NAICS 442 and NAICS 443

NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
442	Furniture & home furnishings stores	\$17,307,305	\$20,929,417	\$3,622,112
443	Electronics & appliance stores	\$18,144,755	\$21,942,130	\$3,797,375

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

Building Material and Garden Equipment and Supplies Dealers (NAICS 444)

Industries in the Building Material and Garden Equipment and Supplies Dealers sub-sector retail new building material and garden equipment and supplies merchandise from fixed point-of-sale locations. Establishments in this sub-sector have display equipment designed to handle lumber and related products and garden equipment and supplies that may be kept either indoors or outdoors under covered areas. The staff is usually knowledgeable in the use of the specific products being retailed in the construction, repair, and maintenance of the home and associated grounds.

Based on population projections, Table 6.29 shows that the Portage County Destination Trade Area has the potential to generate an additional \$16.3 million in resident demand for this retail sub-sector. This additional demand could generate new dedicated or expanded business opportunities. However, the exact potential for specific types of new business will depend on both current supply and the other considerations noted above. Note that these calculations include demand for the hardware stores category analyzed under convenience store opportunities.

Table 6.29: Destination Trade Area Demand for NAICS 444

NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
444	Building material, garden equipment & supplies	\$77,952,660	\$94,266,768	\$16,314,108

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

Clothing and Clothing Accessories Stores (NAICS 448)

Industries in the Clothing and Clothing Accessories Stores sub-sector retailing new clothing and clothing accessories merchandise from fixed point-of-sale locations. Establishments in this sub-sector have similar display equipment and staff that is knowledgeable regarding fashion trends and the proper match of styles, colors, and combinations of clothing and accessories to the characteristics and tastes of the customer.

Based on population projections, Table 6.30 shows that the Portage County Destination Trade Area has the potential to generate an additional \$4.8 million in resident demand for this retail sub-sector. While this additional demand could generate new dedicated or expanded business opportunities, the current sales leakage and industry trends in clothing stores will likely impact this category as well. The exact potential for specific types of new business will depend on these trends as well as the current supply and the other considerations noted above.

Table 6.30: Destination Trade Area Demand for NAICS 448

NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
448	Clothing & clothing accessories stores	\$22,890,307	\$27,680,841	\$4,790,535

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

General Merchandise Stores (NAICS 452)

Industries in the General Merchandise Stores sub-sector retail new general merchandise from fixed point-of-sale locations. Establishments in this sub-sector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes a variety of display equipment and staff trained to provide information on many lines of products.

Based on population projections, Table 6.31 shows that the Portage County Destination Trade Area has the potential to generate an additional \$19.2 million in resident demand for this retail sub-sector. The increasing ability of large general merchandise stores to capture sales from other retail sectors will likely impact future sales potential as well. The exact potential for specific types of new business will depend on both current supply and the other considerations noted above.

Table 6.31: Destination Trade Area Demand for NAICS 452

NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
452	General merchandise stores	\$91,770,589	\$110,976,544	\$19,205,955

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

Health and Personal Care Stores (NAICS 446), Sporting Goods, Hobby, Book, and Music Stores (NAICS 451) and Miscellaneous Store Retailers (NAICS 453)

Industries in the Health and Personal Care Stores sub-sector retail health and personal care merchandise from fixed point-of-sale locations. Establishments in this sub-sector are characterized principally by the products they retail, and some health and personal care stores may have specialized staff trained in dealing with the products. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer's needs.

Industries in the Sporting Goods, Hobby, Book, and Music Stores sub-sector are engaged in retailing and providing expertise on use of sporting equipment or other specific leisure activities, such as needlework and musical instruments. Book stores are also included in this sub-sector.

Industries in the Miscellaneous Store Retailers sub-sector retail merchandise from fixed point-of-sale locations (except new or used motor vehicles and parts; new furniture and house furnishings; new appliances and electronic products; new building materials; and garden equipment and supplies; food and beverages; health and personal care goods; gasoline; new clothing and accessories; and new sporting goods, hobby goods, books, and music). Establishments in this sub-sector include stores with unique characteristics like florists, used merchandise stores, and pet and pet supply stores as well as other store retailers.

Based on population projections, Table 6.32 shows that the Portage County Destination Trade Area has the potential to generate an additional \$10.5 million in resident demand for this retail sub-sector. However, the potential for specific types of new business will depend on both current supply and the other considerations noted above. Note that Health & Personal Care Store calculations (NAICS 446) include demand for the pharmacy/drugstore category analyzed under convenience retail opportunities.

Table 6.32: Destination Trade Area Demand for NAICS 446, NAICS 451 and NAICS 453

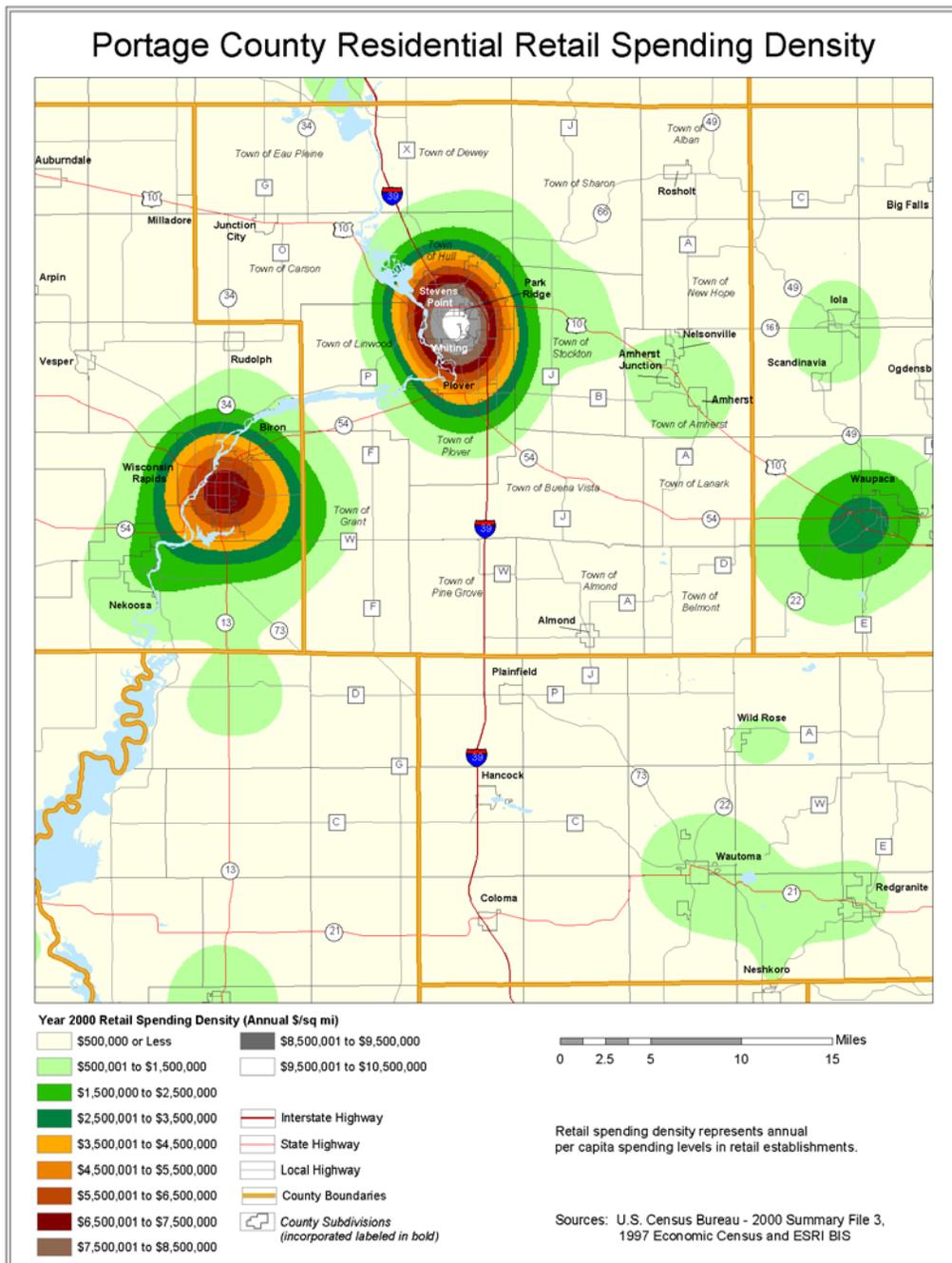
NAICS	Description	2000 Demand	2020 Demand	Change 2020 - 2000
446	Health & personal care stores	25,751,595	31,140,947	5,389,352
451	Sporting goods, hobby, book, & music stores	14,306,442	17,300,526	2,994,084
453	Miscellaneous store retailers	10,747,278	12,996,493	2,249,215

Source: UWEX, Portage County Planning Department and U.S. Census Bureau

3. Residential Retail Spending Distribution

Retail spending potential in the Destination Trade Area is not distributed equally. Accordingly, Map 6.7 shows the concentration of the residential retail spending potential in and around the Portage County Destination Trade Area. The map is based on per capita retail spending levels (in all categories) and population distribution. Note that this map is a generalization of spending density and precise values should not be derived from areas on the map. For instance, some areas around Stevens Point and Plover may be higher than the actual values. Nonetheless, the urban core of Portage County clearly has the largest residential retail spending density in the destination trade area. This spending potential is also larger than the surrounding commercial centers of Wisconsin Rapids and Waupaca.

Map 6.7: Residential Retail Spending Density



4. Destination Retail Conclusions

Within the destination trade area, the anticipated increase in population could generate approximately \$110 million within the previous retail sub-sectors. The additional demand generated by these residents could provide the potential to generate future opportunities in some retail categories. For instance, if Portage County retailers average \$250 to \$350 in sales per square foot, this additional demand might support 325,000 – 450,000 sq ft in additional *destination* retail space over the next 20 years. Again, these numbers are for planning purposes only and should be augmented with a market analyses and feasibility studies. Exact sales per square foot and square footage will also depend on the exact types of

retail developed. To provide perspective on average sales per square foot and store sizes, Appendix B contains sales per square foot and median store sizes by five digit NAICS code. *Furthermore, the future space needs of the destination trade area will depend greatly on several additional factors:*

- Absorption of existing space – many prospective retailers will want to build new sites rather than re-develop existing sites. The desire to move into an existing store will depend on the individual operator, the location of existing space and the condition of the existing space. If the 109,000 sq ft of existing space can be absorbed, future retail space needs could be reduced.
- Potential big box development – If new development is dominated by big box development, space requirements may need to be increased due to their large format (~50,000 – 150,000 sq ft) and their increased land needs.
- Additional demand generated by tourists and other regional residents – If Portage County can continue to become a regional shopping destination, additional demand could be generated by residents outside of the trade area and tourists. The potential to do so will depend on the ability of Portage County to position itself relative to neighboring shopping destinations. Accordingly, additional demand generated by these segments could result in further space requirements. Conversely, if Portage County residents shift some shopping preferences to other retail centers, space requirements could be adversely impacted.
- The amount of space required to meet the convenience market demands previously examined.

Given these caveats and unknowns these projections could be changed dramatically in either direction.

D. Overview of Office Space Opportunities

1. Trends in Office Space

The differences between office space and industrial space have become smaller. Given the needs of many modern companies, office space may include some production and warehousing space in addition to traditional office space. However, the following analysis considers the needs of more traditional office-based businesses and services.

Table 6.33: SIC Categories Generating Significant Office Demand

SIC Code	Description
47	Transportation Services
48	Communications
50	Wholesale Trade
60-65	Finance, Insurance and Real Estate
73	Business Services
781-782	Motion Picture Production and Distribution
80	Health Services
81	Legal Services
829	Schools and Educational Services N.E.C
83	Social Services
86	Membership Organizations
87	Engineering & Management Services

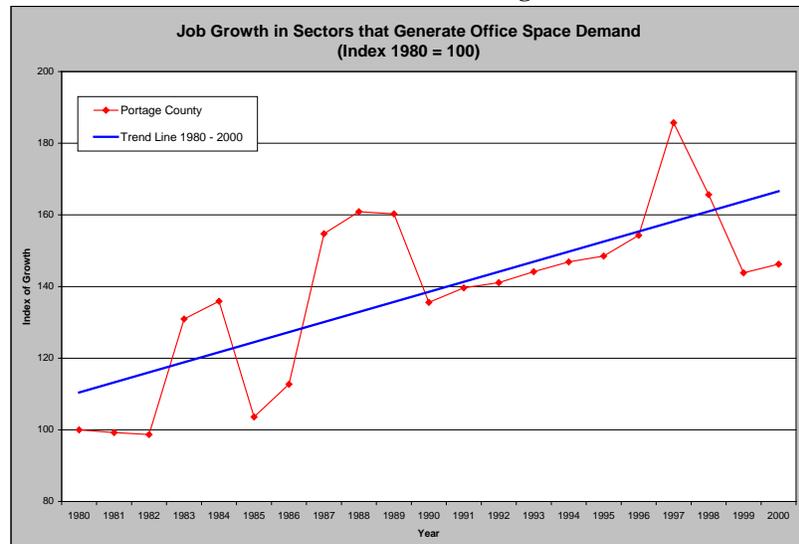
Source: Urban Land Institute

Determining demand for future office space is a subjective task that is based on growth in office-using jobs. Typically, this analysis is done by multiplying the expected growth in office jobs by the typical square footage needed per employee. While all SIC categories include some office jobs, several sectors are strongly office based. As noted by the Urban Land Institute, these office demand generating SIC categories are listed in Table 6.33.

Chart 6.14 shows Portage County job trends in the SIC sectors that produce significant office employment. A twenty-year analysis of these SIC categories shows that jobs have steadily increased in Portage County. However, this growth has been erratic, suggesting that office space needs varied over the last two decades. Given the nature of this growth, it is likely that future demand will follow a similar trend making exact estimates of future office space difficult to calculate.

In addition to the possibility for erratic growth in the Portage County office market, national trends in average space per employee may also affect local demand. At one time the typical office space allocation was ~250 sq ft per employee. However, cost-cutting trends along with office arrangements such as telecommuting and hoteling have reduced this figure. A more current estimate by the Urban Land Institute places the demand at 200 sq ft per employee (including common areas). While allocation will vary by sector and individual business type, 200 sq ft per employee is used here as a reasonable estimate for examining future demand.

Chart 6.14: Job Growth in Sectors Generating Office Demand



Data Sources: U.S. Census Bureau and Bureau of Labor Statistics

2. Future Office Space Demand Estimates

Table 6.34 contains employment projections in industry sectors with significant office jobs. The industry categories are not as detailed as those previously identified in Table 6.33 but have been consolidated to meet available employment projections. The data projects approximately 3,200 additional jobs within these sectors over a 20-year period. If this projected growth occurs, it could generate demand for an estimated 660,000 sq ft of office space. It should be noted that this figure is simply based on employment growth and does not take into account absorption rates or office moves of existing firms. Furthermore, the type of office space needed is not projected (Class A, Class B, etc.) Accordingly, additional office space may be needed to accommodate existing firms looking at moving out of aging offices into new office space. However, any additional needs will be based on the needs of individual firms and is difficult to project. *Given these uncertainties, these numbers should only be used for planning purposes; any specific estimates should include a full feasibility study.*

Table 6.34: Employment Projections in Office Space Generating Sectors

Portage County Industry Sector	2000	2010	2020	Change 2000 - 2010		Change 2010 - 2020	
				Number	Percent	Number	Percent
Transportation and Communications	2,568	2,775	2,943	207	8.1%	168	5.7%
Wholesale trade	1,861	2,078	2,296	217	11.7%	218	9.5%
Finance, insurance & real estate	4,868	5,224	5,555	356	7.3%	331	6.0%
Services*	4,440	5,340	6,316	900	20.3%	976	18.3%
Total	13,737	15,417	17,110	1,680	12.2%	1,693	11.0%
Additional Office Space Projections	-	-	-	Approx. 336,000 sq ft	-	Approx. 328,000 sq ft	-

Source: Woods and Poole Economics (*Note: Numbers have been adjusted for non-office space producing service sectors, such as restaurants, auto service and hotels.)

3. Inventory of Existing Vacant Office Space

According to the Portage County Business Council, there is currently 64,000 square feet of existing office space available in the urban core (as of June 10, 2003). As with vacant retail space, other vacant office space may not be reported below.

Table 6.35: Inventory of Existing Vacant Office Space

Facility Name	Facility Address	Location	Rentable Sq. Ft.
Park West	15 Park Ridge	Park Ridge	800
Jay-Mar Road Professional Court LLC	2040 Jay-Mar Road	Plover	300
Riverview Center	1820 Post Road	Plover	300
Riverview Center	1820 Post Road	Plover	521
Guzman Building	1100 Center Point Drive	Stevens Point	620
Plover Professional Center	1840 Post Road	Plover	693
1244 Strongs Avenue	1244 Strongs Avenue	Stevens Point	900
Mark Erbes Construction	3012 Cleveland Ave. Ste	Plover	1,000
Whiting Professional Center	2619 Post Road	Whiting	2,400
Mark Erbes Construction	3010 Cleveland Ave. Ste. A	Plover	1,400
Accounting Workshop	5001 Heffron	Stevens Point	1,500
2604 Post Road	2604 Post Road	Whiting	1,600
Smith Stout	3241 Business Park Dr	Stevens Point	2,300
Church Street Station	2501 Church Street	Stevens Point	2,400
Rettler Corporation	3317 Business Park Drive	Stevens Point	2,500
Hwy B Professional Offices	300 Plover Road	Plover	2,800
1004 First Street	1004 First Street	Stevens Point	3,300
Truck Terminal	3909 Heffron Ave.	Stevens Point	4,300
Kirschling Office	4916 Kirschling Court	Stevens Point	5,000
Whiting Office Center	2926 Post Road	Stevens Point	5,250
M&I Bank	1245 Main Street	Stevens Point	5,575
Post Whiting Center	2417 Post Road, Stevens Point	Whiting	5,840
Falk Cabinets	2817 Post Road	Stevens Point	6,000
Fox Pointe	2301 Plover Road	Plover	7,000
Total	-	-	64,299

Source: Portage County Business Council

4. Office Space Conclusions

The preceding analysis shows that approximately 660,000 sq ft of office space might be supported by future job growth in Portage County. As previously mentioned, this value is based on projections in employment and typical space requirements for employees. *Factors affecting either of these values could dramatically change the demand for office space.* Furthermore, the necessary amount of future office space will depend on additional factors:

- Absorption of existing space – As with retail, many prospective businesses will want to build new space rather than re-develop existing sites. The desire to move into existing office space will depend on the individual business, the location of existing space and the condition of the existing space. If the existing space can be absorbed, future office space needs will likely be reduced.
- Shifts in the Portage County economy – If the Portage County economy experiences significant shifts in employment sectors, the demand for future office space could be increased or reduced.

- Trends in office space – The allocated square footage per person has changed over the last several decades. If this trend changes again, the amount for future office space could be increased or reduced.
- Space needs of individual companies – As previously noted, the line between office space, warehousing and industrial space has become blurred. If specific companies have special needs, the future need for office space could be impacted.

E. Economic Impacts of Portage County Industries

The additional analysis of industries presented here examines specific impacts of Portage County industries on the overall economy. The intent of this analysis is to identify industries that are important to Portage County’s economy from a number of perspectives. Depending on the direction of Portage County’s economy, these industries may be important from the perspectives of business retention, expansion or opportunities for growing business clusters.

The impact analysis examines the top 30 Portage County industries from the perspectives of industry sales (Total Industry Output, TIO), wages and salaries, total income (Total Value Added, TVA), industry output per employee and industry wages per employee. The analysis is based on IMPLAN (Impact analysis for PLANning) 2000 data from the University of Wisconsin-Madison/Extension. IMPLAN is an Input/Output Model that can be used to examine current industry conditions and assist in identifying future opportunities. These future opportunities will have an impact on the amount of future space needed by these businesses.

1. Total Industrial Output

One basic way to analyze industry impacts is to examine industries according to total sales or Total Industrial Output (TIO). Table 6.36 shows the Top 30 industries in Portage County in terms of total industrial output. Within the top 10 industries, the data shows distinct diversity. While some categories are manufacturing related, others include education, insurance, and wholesale and health services. Overall, these top 10 industries account for almost 54% of the total industrial output in the County.

The number one industry, Frozen Fruits, Juices and Vegetables, accounts for 11.2 % of TIO and includes firms such as McCain Foods and

Table 6.36 – Top 30 Industries by Total Industrial Output

Rank	Industry	Total Industrial Output (TIO)	Percent of Total
1	Frozen Fruits, Juices and Vegetables	\$452,791,260	11.21%
2	Insurance Carriers	\$388,876,984	9.63%
3	Paper Mills, Except Building Paper	\$351,844,513	8.71%
4	Dehydrated Food Products	\$187,417,725	4.64%
5	Wholesale Trade	\$180,197,601	4.46%
6	Motor Freight Transport and Warehousing	\$170,227,310	4.22%
7	State & Local Government - Education	\$135,046,158	3.34%
8	Owner-occupied Dwellings*	\$110,332,664	2.73%
9	Doctors and Dentists	\$108,706,955	2.69%
10	Book Printing	\$91,394,127	2.26%
11	Real Estate	\$76,912,682	1.90%
12	Banking	\$76,362,442	1.89%
13	Furniture and Fixtures, N.E.C.**	\$75,029,594	1.86%
14	Eating & Drinking	\$71,614,250	1.77%
15	Hospitals	\$70,210,251	1.74%
16	New Residential Structures	\$69,927,849	1.73%
17	Railroads and Related Services	\$66,705,292	1.65%
18	Gas Production and Distribution	\$65,067,543	1.61%
19	Vegetables	\$56,076,904	1.39%
20	Fabricated Metal Products, N.E.C.**	\$47,644,924	1.18%
21	State & Local Government - Non-Education	\$46,829,796	1.16%
22	Miscellaneous Retail	\$41,191,029	1.02%
23	Maintenance and Repair Other Facilities	\$37,375,633	0.93%
24	Food Stores	\$36,790,730	0.91%
25	New Industrial and Commercial Buildings	\$35,461,029	0.88%
26	Automotive Dealers & Service Stations	\$35,233,246	0.87%
27	Condensed and Evaporated Milk	\$34,940,006	0.87%
28	General Merchandise Stores	\$30,111,000	0.75%
29	Maintenance and Repair, Residential	\$28,451,954	0.70%
30	Photofinishing, Commercial Photography	\$27,917,974	0.69%
Top 30 Total		\$3,206,689,425	79.4%

Source: IMPLAN 2000, University of Wisconsin-Madison/Extension

*Note: The “Owner Occupied Dwellings” sector accounts for homeowners’ mortgage payments and should not be considered a productive industry such as manufacturing or services.

** Not Elsewhere Classified

Golden County Foods. Insurance Carriers (Sentry Insurance) and Paper Mills (Stora Enso and Kimberly-Clark) account for 9.6% and 8.7% respectively. The fourth largest industry, Dehydrated Food Products (Basic American Inc.), accounts for 4.6% of the County’s total industrial output.

One interesting industry is Wholesale Trade. This industry accounts for 4.5% of the TIO, but is not dominated by firms employing a large number of people. The 2001 County Business Patterns from the U.S. Census Bureau show that most firms in this sector employ fewer than 20 employees. The one exception is Schierl Inc. which has a more significant number of employees.

Note that the industry category ranked number 30 (Photofinishing, Commercial Photography) will be significantly impacted with the closing of Qualex Inc.

2. Total Employment

In addition to total industrial output, another way to examine industry impacts is by aggregate employment. The following table ranks the top 30 Portage County industries by their number of employees. It is noted that the employment figures are not based on full-time equivalents. That is, full-time jobs and part time jobs are counted equally. The existence of part-time employees may be especially true in the large employment sectors of Eating and Drinking establishments and retail establishments. Accordingly, numbers in these categories may be somewhat deceptive.

The 30 largest industries account for almost 75% of Portage County employment, with the ten largest accounting for 46.7% of all employment. Again, the top ten industries are diversified with a variety of sectors (both public and private) represented.

In terms of total employment, education is the largest industry. This industry includes both local public school systems as well as UW-Stevens Point. As with TIO, Insurance Carriers is second largest industry followed by eating and drinking places. While it is ranked 22nd in terms of total industrial output, the Miscellaneous Retail industry category is the sixth largest employer. This category includes catalog and mail order retailers such as Lands’ End, Herrschners Inc. and Figi’s Mail Order Gifts.

Table 6.37: Top 30 Industries by Employment

Rank	Industry	Total Employment	Percent of Total
1	State & Local Government - Education	3,610	8.45%
2	Insurance Carriers	2,777	6.50%
3	Eating & Drinking	2,423	5.67%
4	Frozen Fruits, Juices and Vegetables	2,180	5.10%
5	Wholesale Trade	1,913	4.48%
6	Miscellaneous Retail	1,665	3.90%
7	State & Local Government - Non-Education	1,511	3.54%
8	Motor Freight Transport and Warehousing	1,457	3.41%
9	Food Stores	1,237	2.90%
10	Paper Mills, Except Building Paper	1,187	2.78%
11	Doctors and Dentists	1,130	2.65%
12	Hospitals	1,069	2.50%
13	General Merchandise Stores	930	2.18%
14	Dehydrated Food Products	811	1.90%
15	Labor and Civic Organizations	755	1.77%

Rank	Industry	Total Employment	Percent of Total
16	Hay and Pasture	722	1.69%
17	Book Printing	641	1.50%
18	Automotive Dealers & Service Stations	620	1.45%
19	Maintenance and Repair Other Facilities	617	1.45%
20	Real Estate	524	1.23%
21	Insurance Agents and Brokers	502	1.18%
22	Personnel Supply Services	497	1.16%
23	Hotels and Lodging Places	482	1.13%
24	New Residential Structures	449	1.05%
25	Banking	443	1.04%
26	Vegetables	385	0.90%
27	Furniture and Fixtures, N.E.C*	361	0.85%
28	Railroads and Related Services	361	0.85%
29	Computer and Data Processing Services	333	0.78%
30	Other Medical and Health Services	332	0.78%
	Top 30 Total	31,925	74.7%

Source: IMPLAN 2000, University of Wisconsin-Madison/Extension

* Not Elsewhere Classified

3. Total Value Added

Total value added (TVA) is a comprehensive measure of income including wages and salaries, proprietor income, and rental income. Table 6.38 ranks the top 30 Portage County industries based on their TVA. These 30 industries account for 81.3% of TVA in Portage County. Insurance carriers are the largest industry in terms of TVA with over \$233 million and 11.8% of the total. As with TIO and employment, Insurance Carriers, Education, Wholesale Trade, Paper Mills and Frozen Fruits, Juices and Vegetables continue to be significant industries in terms of their aggregate TVA in Portage County.

Table 6.38: Top 30 Industries by Total Value Added

Rank	Industry	Total Value Added	Percent of Total
1	Insurance Carriers	\$233,373,228	11.85%
2	State & Local Government - Education	\$135,046,158	6.86%
3	Wholesale Trade	\$123,746,351	6.28%
4	Paper Mills, Except Building Paper	\$114,517,102	5.81%
5	Frozen Fruits, Juices and Vegetables	\$102,081,226	5.18%
6	Owner-occupied Dwellings*	\$83,574,883	4.24%
7	Dehydrated Food Products	\$78,390,559	3.98%
8	Motor Freight Transport and Warehousing	\$77,892,299	3.95%
9	Doctors and Dentists	\$73,179,485	3.72%
10	Real Estate	\$54,710,396	2.78%
11	Banking	\$50,568,453	2.57%
12	State & Local Government - Non-Education	\$46,829,797	2.38%
13	Hospitals	\$43,752,042	2.22%
14	Railroads and Related Services	\$33,756,341	1.71%
15	Food Stores	\$33,460,721	1.70%
16	Eating & Drinking	\$33,219,516	1.69%
17	Miscellaneous Retail	\$32,129,310	1.63%
18	Book Printing	\$31,910,239	1.62%
19	Automotive Dealers & Service Stations	\$26,461,116	1.34%
20	Maintenance and Repair Other Facilities	\$25,634,697	1.30%
21	General Merchandise Stores	\$23,740,101	1.21%
22	Furniture and Fixtures, N.E.C.**	\$21,275,353	1.08%
23	Computer and Data Processing Services	\$20,637,331	1.05%
24	Fabricated Metal Products, N.E.C.**	\$19,086,659	0.97%
25	Insurance Agents and Brokers	\$15,981,352	0.81%
26	Federal Government - Non-Military	\$14,108,961	0.72%
27	New Residential Structures	\$13,790,592	0.70%
28	Gas Production and Distribution	\$13,433,108	0.68%
29	New Industrial and Commercial Buildings	\$12,784,714	0.65%
30	Photofinishing, Commercial Photography	\$11,395,568	0.58%
	Top 30 Total	\$1,600,467,658	81.3%

Source: IMPLAN 2000, University of Wisconsin-Madison/Extension

*Note: The "Owner Occupied Dwellings" sector accounts for homeowners' mortgage payments and should not be considered a productive industry such as manufacturing or services.

** Not Elsewhere Classified

In considering Tables 6.36, 6.37 and 6.38, a number of industries categories are consistently large in terms of aggregate industrial output, employment and TVA. In particular, eight industry categories are ranked in the top 15 for TIO, employment and TVA. These categories are shown below with representative companies shown in parentheses.

- Insurance Carriers (Sentry Insurance)
- State and Local Government – Education (UW Stevens Point and local public schools)
- Frozen Fruits, Juices and Vegetables (McCain Foods, Golden County Foods)
- Paper Mills (Stora Enso North America and Kimberly-Clark)
- Wholesale Trade (Schierl Inc and numerous smaller firms)
- Motor Freight Transport and Warehousing (H O Wolding, Inc.)
- Doctors and Dentists (Ministry Medical Group, Inc.)
- Dehydrated Food Products (Basic American Inc.)
- Hospitals (St. Michael’s Hospital of Stevens Point)

The impact of recent job losses at Blue Cross & Blue Shield, Stora Enso North America and Qualex Inc. are not shown in these numbers and may change the rankings for Insurance Carriers, Paper Mills and Photofinishing, Commercial Photography. Other industry categories consistently large in two of the three aggregate measures of economic activity (TIO, employment and TVA) are Real Estate, Banking and Eating and Drinking Places.

4. Total Industry Output per Employee

While total levels of TIO, employment and TVA are useful, it is difficult to make comparisons based on the scale of the industry. That is, extremely small or large industries may skew the data. To examine the possible effects of scale, Table 6.39 examines total industrial output normalized by the number of employees in the industry.

Table 6.39: Top 30 Industry Categories by Total Industrial Output per Employee

Rank	Category	TIO per Employee	Employment
1	Gas Production and Distribution	\$ 907,177	72
2	Condensed and Evaporated Milk	\$ 502,640	70
3	Malt Beverages	\$ 408,934	27
4	Metal Cans	\$ 336,846	5
5	Electric Services	\$ 319,748	34
6	Paper Mills, Except Building Paper	\$ 296,311	1,187
7	Fertilizers, Mixing Only	\$ 285,874	7
8	Poultry and Eggs	\$ 280,278	12
9	Cattle Feedlots	\$ 262,747	7
10	Laboratory Apparatus & Furniture	\$ 232,402	7
11	Dehydrated Food Products	\$ 231,079	811
12	Hardware, N.E.C.*	\$ 214,881	5
13	Dairy Farm Products	\$ 208,124	131
14	Frozen Fruits, Juices and Vegetables	\$ 207,713	2,180
15	Furniture and Fixtures, N.E.C.*	\$ 207,655	361
16	Canned Fruits and Vegetables	\$ 205,987	103
17	Communications, Except Radio and TV	\$ 202,499	60
18	Other State and Local Govt. Enterprises	\$ 190,740	101
19	Railroads and Related Services	\$ 184,683	361
20	Sanitary Services and Steam Supply	\$ 179,759	59
21	Farm Machinery and Equipment	\$ 177,164	27
22	Banking	\$ 172,297	443
23	Sawmills and Planing Mills, General	\$ 171,590	66
24	General Industrial Machinery, N.E.C.*	\$ 171,296	103
25	Security and Commodity Brokers	\$ 170,784	34
26	Frozen Specialties	\$ 169,297	90
27	Ready-mixed Concrete	\$ 161,711	21
28	New Residential Structures	\$ 155,845	449
29	Fabricated Metal Products, N.E.C.*	\$ 153,345	311
30	New Government Facilities	\$ 152,871	178

Source: IMPLAN 2000, University of Wisconsin-Madison/Extension * Not Elsewhere Classified

Industry output per job is often used as a simple measure of industry productivity, with high levels of output per job being considered as more productive.

Again, the top 30 Portage County Industries are ranked according to their TIO per employee. In comparing this table to previous tables, a number of large differences are discernible. For instance, industries that were highly ranked in terms of aggregate TIO are ranked lower in terms of TIO per employee. For example, in terms of aggregate TIO frozen fruits, juices and vegetables were ranked number one. In terms of TIO per employee, frozen fruits, juices and vegetables are ranked number fourteen. A similar effect is shown in paper mills.

Note that nine of the top ten categories employ fewer than 75 employees. These categories include gas production and distribution (72 employees), condensed and evaporated milk (70 employees) and malt beverages (27 employees). These rankings imply that smaller industries can be both productive and important to the Portage County economy. Furthermore, these numbers suggest that targeting industries for possible growth and development should not be simply based on the scale of the industry. Small industries such as these are possible opportunities for future recruitment or expansion.

5. Wages and Salary per Employee

Section 6.3 of this Chapter demonstrated that average wages per job are declining relative to the national average. Furthermore, the average wage in Portage County remains somewhat below that of the State. In determining those specific industries with well-paying jobs, Table 6.40 examines average per job in Portage County industries. The top 30 industries in terms of average wage per job are listed in the following table. The data shows that Gas Production and Distribution has the highest average wage. This industry also had the highest TIO per employee. Other industries not previously ranked in the top ten aggregate measures (TIO, employment, TVA) include Railroads and Related Services and Security Commodity Brokers.

The wage per job data shows a large difference in industry scale. Note that some industries with large employment, such as retail and eating and drinking places, are not listed below. However, other industries with a large number of employees also show high average wages. Industries such as Paper Mills, Insurance Carriers and Doctors and Dentists, Education and Wholesale Trade are included in the top 30 industries for both wages and employment. These industries will continue to be vital to Portage County's economy from a number of perspectives.

In contrast, some smaller industries are listed in the top 30 with only 5 to 30 employees. These firms may not be particularly obvious, but remain important to the economy. Despite their smaller size, these firms should not be ignored in the future direction of Portage County's economic development.

Table 6.40: Top 30 Industry Categories by Wage per Job

Rank	Industry	Wage per Job	Total Employment
1	Gas Production and Distribution	\$ 70,260	72
2	Railroads and Related Services	\$ 68,653	361
3	Security and Commodity Brokers	\$ 66,884	34
4	Electric Services	\$ 63,880	34
5	Paper Mills, Except Building Paper	\$ 57,586	1,187
6	U.S. Postal Service	\$ 55,268	134
7	Fabricated Plate Work (Boiler Shops)	\$ 54,561	21
8	Malt Beverages	\$ 53,994	27
9	Hardware, N.E.C.*	\$ 53,467	5
10	Doctors and Dentists	\$ 53,021	1,130
11	Dehydrated Food Products	\$ 52,034	811
12	Sanitary Services and Steam Supply	\$ 50,996	59
13	Fabricated Metal Products, N.E.C.*	\$ 50,014	311
14	Communications Equipment N.E.C.*	\$ 48,762	14
15	Insurance Carriers	\$ 48,324	2,777
16	Federal Government - Non-Military	\$ 47,045	253
17	Laboratory Apparatus & Furniture	\$ 46,882	7
18	Computer and Data Processing Services	\$ 44,451	333
19	Ready-mixed Concrete	\$ 43,232	21
20	Commercial Printing	\$ 40,484	157
21	Sand and Gravel	\$ 40,452	27
22	Other State and Local Govt. Enterprises	\$ 38,893	101
23	New Government Facilities	\$ 38,887	178
24	Lighting Fixtures and Equipment	\$ 38,453	20
25	Newspapers	\$ 37,987	141
26	Local Government Passenger Transit	\$ 37,712	8
27	State & Local Government - Education	\$ 37,411	3,610
28	Communications, Except Radio and TV	\$ 37,286	60
29	Book Printing	\$ 37,080	641
30	Wholesale Trade	\$ 36,912	1,913

Source: IMPLAN 2000, University of Wisconsin-Madison/Extension

* Not Elsewhere Classified

F. Employment Projections

As with population projections, employment forecasts are typically incorrect to various degrees. Nonetheless, they may still provide some general insights into forthcoming changes to the Portage County economy. Overall, employment in Portage County is projected to grow at slightly smaller rates than the State or Nation. Reflecting Portage County's current economy, manufacturing, retail trade and services are projected to be the three largest growth sectors in terms of net employment gains. While the service category is projected to grow at a similar rate to the State and Nation, retail trade is projected to grow at a slower rate. In contrast, manufacturing is projected to grow at a much faster rate than the United States or State of Wisconsin. Again, the current state of manufacturing in the State and Nation has the potential to dramatically change these numbers.

Table 6.41: Portage County Employment Projections, 2000 to 2020

Industry Category	Portage County 2000 to 2020		State of Wisconsin 2000 to 2020		United States 2000 to 2020	
	Numeric Change	Percent Change	Numeric Change	Percent Change	Numeric Change	Percent Change
Total Employment	8,878	21.2%	817,046	23.7%	4,403,116	26.5%
Farm Employment	-114	-7.0%	-11,817	-11.6%	-277,194	-8.9%
Agricultural Services, Other	85	19.5%	9,370	26.9%	567,191	26.3%
Mining	Less than 5	8.7%	586	15.5%	171,351	19.7%
Construction	410	22.7%	40,646	23.3%	2,039,959	22.0%
Manufacturing	1,257	19.6%	62,397	9.7%	750,841	3.8%
Transport, Communications & Public Utilities	375	14.6%	26,156	17.0%	1,621,832	20.3%
Wholesale Trade	435	23.4%	46,405	30.3%	2,045,969	26.7%
Retail Trade	1,291	16.9%	107,657	18.2%	6,472,255	23.5%
Finance, Ins. And Real Estate	687	14.1%	63,077	27.0%	3,451,366	26.8%
Services	3,684	42.3%	396,148	41.7%	22,244,349	42.2%
Federal Civilian Government	21	10.1%	1,521	5.2%	98,778	3.5%
Federal Military Government	Less than 5	-0.4%	-66	-0.3%	-6,876	-0.3%
State And Local Government	746	13.5%	74,966	21.2%	4,857,295	27.7%

Source: University of Wisconsin Extension/Woods and Poole Economics

Detailed State Industry Employment Forecasts – 2000 to 2010

To assist in understanding the future direction of employment in the State and the possible impact on Portage County’s economy, ten-year projections in State employment growth are included in Table 6.42.

While these numbers are projections, they show a number of industries identified as strengths to the Portage County economy are predicted to grow. More specifically, employment in food manufacturing (1.7%), wholesale trade (7.2%), educational services (10.0%), miscellaneous retail (16.3%), insurance carriers (9.5%), trucking and warehousing (7.1%) and health services (23.4%) are all projected to grow in the State. However, several other important industries in Portage County are projected to decline Statewide. These include paper manufacturing (-2.8%) and railroad transportation (-34.0%). The impact of these forecasts on specific Portage County industries remains to be seen. However, this information does suggest possible areas of future economic growth or decline in the County.

Table 6.42: Employment Forecasts for the State of Wisconsin

Industry Title	2000-2010 Percent Change	Industry Title	2000-2010 Percent Change
Total All Industries	9.6%		
Agricultural Services	33.0%	Wholesale Trade	7.2%
Mining	-9.1%	Wholesale Trade, Durable Goods	7.6%
Metallic Minerals and Fuels	0.0%	Wholesale Trade, Nondurable Goods	6.6%
Nonmetallic Minerals, Except Fuels	-8.8%	Retail Trade	10.9%
Construction	9.5%	Building Materials & Garden Supplies	8.2%
General Building Contractors	9.0%	General Merchandise Stores	7.7%
General Contractors, Except Building	10.0%	Food Stores	5.0%
Special Trade Contractors	9.5%	Auto Dealers & Service Stations	9.8%
Manufacturing	-2.0%	Apparel and Accessories Stores	-7.7%
Durable Goods Manufacturing	-2.5%	Furniture & Home furnishings Stores	13.4%
Lumber and Wood Products	8.6%	Eating and Drinking Places	14.2%
Furniture and Fixtures	14.3%	Miscellaneous Retail Stores	16.3%
Stone, Clay, and Glass	7.0%	Finance, Insurance, and Real Estate	8.7%
Primary Metal Industries	-11.0%	Depository Institutions	4.1%
Fabricated Metal Products	-3.2%	Non-depository Institutions	8.8%
Industrial Machinery and Equipment	-4.9%	Security & Commodity Brokers	14.7%
Electronic & Other Electrical Equipment	-5.6%	Insurance Carriers	9.5%
Transportation Equipment	-7.1%	Insurance Agents, Brokers, & Services	8.7%
Instruments and Related Products	-2.4%	Real Estate	12.3%
Miscellaneous Manufacturing Industries	2.0%	Holding & Other Investment Offices	16.0%
Nondurable Goods Manufacturing	-1.3%	Services	19.3%
Food & Kindred Products	1.7%	Hotels & Other Lodging Places	18.9%
Textile Mill Products	-17.0%	Personal Services	12.0%
Apparel and Textile Products	-13.9%	Business Services	18.5%
Paper & Allied Products	-2.8%	Auto Repair Services and Parking	29.5%
Printing & Publishing	-2.4%	Miscellaneous Repair Services	5.7%
Chemicals & Allied Products	5.9%	Motion Pictures	0.6%
Petroleum and Coal Products	-7.0%	Amusement & Recreation Services	37.7%
Rubber & Miscellaneous Plastics Products	2.1%	Health Services ⁽²⁾	23.4%
Leather & Leather Products	-54.3%	Legal Services	28.2%
Transportation	7.5%	Educational Services ⁽²⁾	10.0%
Railroad Transportation	-34.0%	Social Services	31.5%
Local and Interurban Transit	16.3%	Museums, Botanical, Zoological Garden	30.3%
Trucking and Warehousing	7.1%	Membership Organizations	16.2%
U.S. Postal Service ⁽¹⁾	0.5%	Engineering & Management Services	29.8%
Water Transportation	0.9%	Private Households	-27.8%
Transportation by Air	11.2%	Services, Not Elsewhere Classified	43.2%
Pipe Lines, Except Natural Gas	-25.0%	Self-Employed and Unpaid Family Workers	
Transportation Services	24.9%	Self-Employed Workers ⁽³⁾	1.8%
Communications and Utilities	2.8%	Unpaid Family Workers ⁽⁴⁾	-14.1%
Communications	3.6%	Government	5.6%
Utilities and Sanitary Services	2.0%	Federal Government ⁽²⁾	-0.1%
		State Government, Ex. Education & Hospitals ⁽⁵⁾	3.2%
		Local Government, Ex. Education & Hospitals ^(5,6)	7.1%

Source: Wisconsin Department of Workforce Development – March 2003

- (1) Postal Service employment was taken out of Federal Government employment
- (2) Includes State & Local Government employment.
- (3) This code is used for occupational projection purposes. This code includes all people who are self-employed, regardless of industry.
- (4) This code is used for occupational projection purposes. This code includes all family members who work unpaid in family-owned businesses, regardless of the industry.
- (5) State & Local Government employment in Education and Hospitals is removed and included with Educational Services (SIC 82) and Health Services (SIC 80).
- (6) Local Government includes Tribal Owned Operations.

Information is derived using the 2001 OES/Wage Survey, 2000 ES-202 and 2000 CES (3/01 Benchmark) data. Unpublished data from the US Bureau of Labor Statistics and US Census Bureau was also used.

To the extent possible, the projections take into account anticipated changes in Wisconsin's economy from 2000 to 2010. It is important to note that unanticipated events may affect the accuracy of these projections.

Section 6.7 Future Commercial Development Location Considerations

Future commercial growth in Portage County is both certain and necessary, bringing costs and benefits to Portage County residents. These costs and benefits can be economic, social or environmental with varying magnitudes. However, the planning process can be conducted in an attempt to maximize the benefits while minimizing the costs. The following discussion analyzes a number of locational considerations that could impact the costs and benefits of new economic development in Portage County.

Future commercial growth in Portage County will require additional land and buildings. The exact amount of land and specific types of buildings required will depend somewhat on the types of businesses recruited or expanded in Portage County. That is, different types of businesses and industries have different locational needs and preferences. Ultimately, these locational needs will impact the character of both individual communities and the entire region. The goal of this section is to identify a number of potential impacts that new commercial development could have on Portage County residents and business owners. However, these potential impacts should not be considered as all inclusive.

While previous sections of this Chapter examined a number of economic and industry trends, the ultimate direction of Portage County's future economy will result from market forces coupled with a dialogue of citizens, business leaders and economic development professionals. As this discussion is ongoing, the following content examines general considerations that could arise from new development rather than specific impacts.

A. County versus Community Location Considerations

In general, new economic opportunities in Portage County will benefit residents regardless of the municipality where new development occurs. Namely, economic growth in one Portage County community will have positive benefits beyond that community's border. A number of the specific regional economic benefits include:

Creation of New Jobs – Previous sections of this report demonstrated the regional nature of the workforce. More specifically, it is increasingly common for workers to live in one community and work in another. In considering this mobility, a job created anywhere in Portage County provides the potential for anyone in the region to fill that position. As a result, job creation in one community could benefit residents of other communities.

Creation of New Income – Similar to job creation, income earned in one area is likely to be spent throughout the region. Income earned in one community may be spent throughout the county and region. Therefore, development opportunities in a specific community will have both regional and local benefits.

Creation of New Tax Revenue – While property taxes are collected in the specific municipality where development occurs, sales tax collected at a given business in Portage County is returned to all residents in the County, regardless of their municipality. The current fiscal challenges in the State make new potential revenue increasingly important.

Given the regional implications of new development, the impact of new development in Portage County is not considered on a municipality by municipality basis. Instead, potential development considerations are examined at the county level. While new development could occur anywhere, the assumption used throughout this section is that new development will most likely occur around existing commercial and industrial development nodes and areas designated

for future development. These areas include established and proposed retail concentrations and business parks.

1. Accessibility and Travel Considerations

One of the goals established under the comprehensive planning grant program is to provide “an integrated, efficient and economical transportation system that affords mobility, convenience and safety and meets the needs of all citizens, including transit-dependent and disabled citizens.”¹ These goals are echoed in the Guiding Principles adopted for the Portage County Comprehensive Plan (as stated by the Urban Area and Rural Comprehensive Plan Steering Committees). More specifically, several of the preliminary goals for the transportation element include:

- Developing a public transportation network that encourages Portage County Urban Area residents to reduce automobile trips.
- Encouraging and accommodating human-powered transportation options.
- Decisions regarding transportation should be consistent with other elements of the comprehensive plan.

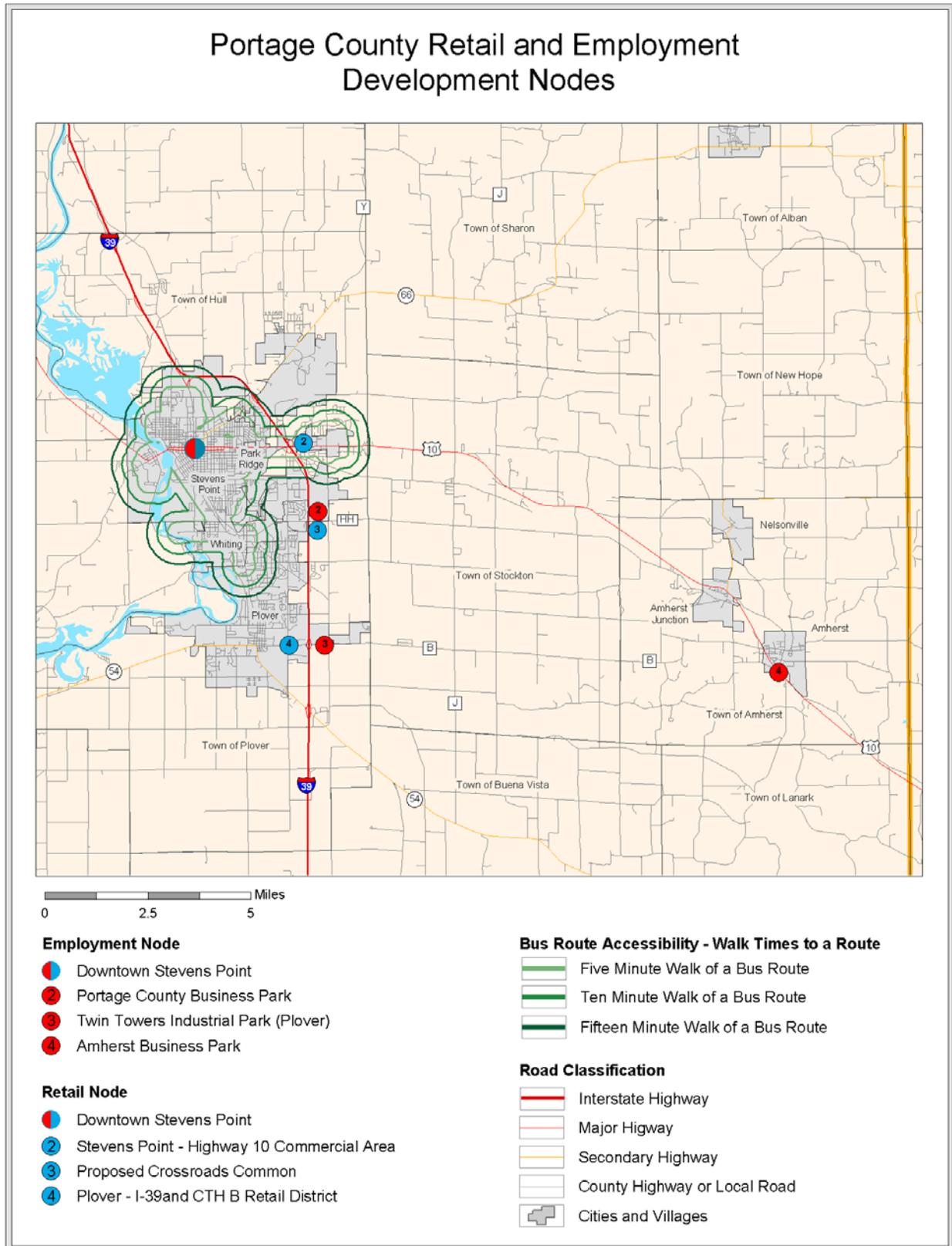
While these goal statements are related to the transportation element, they are impacted by the placement of new economic opportunities. That is, the critical feature of development and its impact on transportation behavior is its location. More central locations tend to shorten travel distances to most destinations within a community, tend to be served better by public transit, and allow some trips to be made without a car. However, central areas can be congested and have a lack of parking (either perceived or real). In contrast, areas on the edge have an abundance of free parking that contributes to the ease of access.

To examine this potential conflict and possible accessibility considerations of new business placement, the following discussion models access of Portage County residents to retail and employment nodes. The locations of these nodes are depicted in Map 6.8. The accessibility to these areas is important as they correspond to the two activities that typically generate the greatest number of trips (shopping and working). The accessibility calculations consider current and future population distributions, the locations of existing and proposed development nodes and possible modes of transportation. The intent is to determine whether population shifts or infrastructure changes may have a significant impact on accessibility to different retail and employment centers. These potential shifts may suggest potential advantages or disadvantages of directing new development toward certain areas.

This type of analysis is important in early planning stages as an evaluation of current land use and population distributions. However, this analysis is simply exploratory in nature. The analysis does not seek to answer questions, but is intended to present information for the purpose of discussion.

¹ Division of Intergovernmental Relations. *Wisconsin's Comprehensive Planning Legislation*. September 24, 2001 (Revised September 2003), pg 8.

Map 6.8: Portage County Retail and Employment Development Nodes



2. Retail Node Accessibility Considerations

The following analysis examines current retail center accessibility as well as accessibility implications associated with future growth. In examining accessibility implications, the analysis makes the following assumptions:

- While retail development could occur throughout Portage County, the majority of new retail development will be focused around four existing or proposed retail development nodes. The existing nodes include Downtown Stevens Point, the Highway 10 E commercial strip in Stevens Point and the Plover retail district located near I-39 and CTH B. Furthermore, the proposed Crossroads Common (I-39 and CTH HH) is included to examine potential accessibility impacts of this development. These areas will provide retailers with the best potential for clustering and building critical mass that will attract customers. Furthermore, these areas offer the greatest range of goods and services and therefore provide the best opportunity for trip chaining (visiting multiple commercial locations during the same trip).
- The future population distribution will follow the projections made by the Portage County Planning Department.
- The pending reconstruction of Highway 10 will impact accessibility and is factored into the analysis examining future accessibility. This analysis assumes that the terminus for the eastern portion of re-routed Highway 10 route will be at the current junction of I-39 and Highway HH. However, there may be additional road improvements between the year 2000 and the year 2020 that could affect accessibility.
- The majority of Portage County residents will use these four retail nodes as their primary shopping options. However, residents may still use shopping districts in surrounding counties, smaller convenience centers, or other opportunities in smaller communities.
- The accessibility analysis places the four retail centers on an equal basis. That is, the analysis does not consider the attractiveness of the businesses in a retail center, the size of the center, or parking or convenience issues (either real or perceived), or the desirability of a node from a retailer's perspective.
- The availability of different transportation modes does not necessarily mean that residents will make use of these options.
- There are many measures of accessibility. For the purposes of this analysis, travel time from a resident's home to a retail node is used as the measure.

3. Retail Node Automobile Accessibility for Portage County Residents

The private automobile is the preferred transportation choice for most individuals. Its preferred status and availability make auto accessibility a primary consideration. For purposes of this analysis, automobile accessibility is defined by the drive time from a resident's home to a given retail node. Accordingly, Chart 6.15 and Table 6.43 examine drive times for current Portage County residents to the four retail nodes previously mentioned. The analysis uses the *current population distribution and existing road network* to determine the percentage of Portage County residents within different drive times. These calculations are created using ideal driving conditions (limited traffic and stops).

From a driving perspective, the accessibility analysis reveals a number of observations:

- For short trips (five minutes or less) Downtown and the Hwy. 10 commercial areas have the best accessibility. However, these calculations may not reflect the true convenience of these areas (especially downtown). The small percentages within a 5-minute drive of the Plover shopping district and the proposed Crossroads Common are due to the relative distance of these areas from the population.
- Almost 50% of the Portage County population is within a 5-to-10 minute drive of the Crossroads Common. Furthermore, over 67% of the population is within a 10-minute drive or less. Given its location near Stevens Point and Interstate 39, this potential development would provide good accessibility to most Portage County citizens.
- Within drive times of 15 minutes or less, all four of the retail centers have similar accessibility percentages. With 71.9% to 76.3% of the population within a 15 minute drive of these retail nodes, these areas are fairly accessible to most Portage County residents. Accordingly, it is likely that travel time will not be a significant barrier for patrons of these areas. Instead, travel to these areas will be dictated by consumer preference, parking availability and retail mix. Given the lack of Interstate visibility for downtown, a good retail mix, wayfinding signage and adequate parking will be vital for the commercial success of this retail node.

Chart 6.15: Retail Node Accessibility for the 2000 Population Distribution

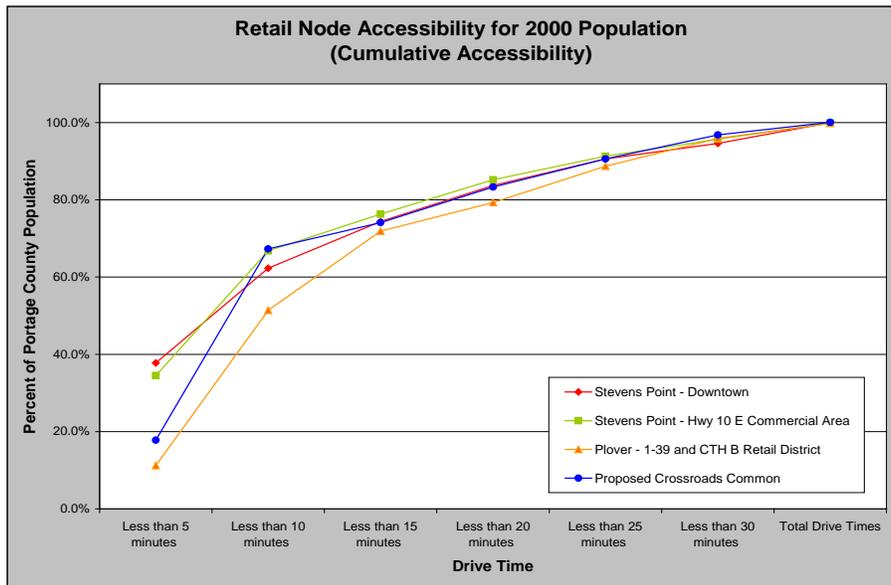


Table 6.43: Retail Node Accessibility for the 2000 Population Distribution

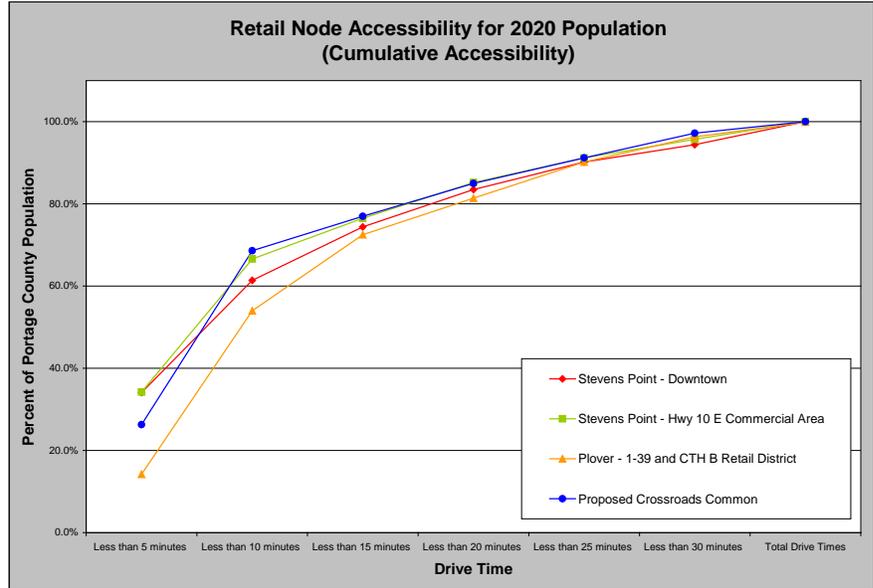
Drive Time for Year 2000 Population	Stevens Point – Downtown		Stevens Point – Hwy 10 E. Commercial Area		Plover – 1-39 and CTH B Retail District		Proposed Crossroads Common	
	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent
Less than 5 minutes	37.8%	37.8%	34.5%	34.5%	11.2%	11.2%	17.8%	17.8%
5 to 10 minutes	24.5%	62.3%	32.3%	66.8%	40.2%	51.4%	49.5%	67.3%
10 to 15 minutes	12.1%	74.4%	9.5%	76.3%	20.5%	71.9%	6.8%	74.1%
15 to 20 minutes	9.3%	83.7%	8.9%	85.2%	7.4%	79.3%	9.2%	83.3%
20 to 25 minutes	6.9%	90.6%	6.1%	91.3%	9.4%	88.7%	7.3%	90.6%
25 to 30 minutes	4.0%	94.6%	4.4%	95.7%	7.2%	95.9%	6.2%	96.8%
30 minutes or more	5.4%	100.0%	4.2%	100.0%	3.9%	100.0%	3.3%	100.0%

Similar to the analysis for the current population distribution, Chart 6.16 and Table 6.44 examine drive times for future Portage County residents and the four retail centers previously mentioned. However, *the analysis uses the projected 2020 population (from the Portage County Planning Department) along with the pending Highway 10 improvements.* The goal is to determine if future changes in population distribution or infrastructure improvements changes accessibility to these retail nodes. Again, automobile accessibility is defined by the drive time from a resident’s home to a given retail node.

In comparing the 2020 accessibility data to the calculations for the year 2000 data, a number of changes are apparent.

- A smaller percentage of residents will be within a five minute drive of Downtown Stevens Point and the Hwy 10 Commercial Area in Stevens Point. However, these areas still have the largest percentage of the population within a five-minute drive.

Chart 6.16: Retail Node Accessibility for the 2020 Population Distribution



Furthermore, traffic counts in Downtown Stevens Point will not likely see a significant decrease given the local nature of most traffic in the downtown area.

- In the year 2020, the Crossroads Commons development will have a significantly higher percentage of the population within a five-minute drive. This change is likely a result of population growth near this area and the improvements made to Highway 10.
- As with the year 2000 data, all four centers have a similar percentage of the population within a drive time of 15-minutes or less. Furthermore, these percentages are not considerably higher than they were in the year 2000. Accordingly, these four retail nodes will continue to have good overall accessibility and do not suggest any future advantage of one area over another.

Table 6.44: Retail Node Driving Accessibility for the 2020 Population Distribution

Drive time for Year 2020 Population	Stevens Point – Downtown		Stevens Point – Hwy 10 E. Commercial Area		Plover – 1-39 and CTH B Retail District		Proposed Crossroads Common	
	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent
Less than 5 minutes	34.1%	34.1%	34.2%	34.2%	14.2%	14.2%	26.3%	26.3%
5 to 10 minutes	27.3%	61.4%	32.4%	66.6%	39.8%	54.0%	42.3%	68.6%
10 to 15 minutes	13.0%	74.4%	9.9%	76.5%	18.5%	72.5%	8.4%	77.0%
15 to 20 minutes	9.1%	83.5%	8.7%	85.2%	8.9%	81.4%	8.0%	85.0%
20 to 25 minutes	6.7%	90.2%	6.0%	91.2%	8.8%	90.2%	6.2%	91.2%
25 to 30 minutes	4.2%	94.4%	4.5%	95.7%	6.1%	96.3%	6.0%	97.2%
30 minutes or more	5.6%	100.0%	4.3%	100.0%	3.6%	100.0%	2.8%	100.0%

4. Pedestrian and Public Transit Accessibility for Portage County Urban Core Residents

The availability of public transportation or pedestrian amenities does not mean that residents will use these alternate forms of transportation. However, if these alternate forms of transportation are inaccessible, then it is increasingly unlikely that these modes will be used. Accordingly, the following analysis examines the location of retail centers relative to alternative transportation options in the urban core of Portage County (Stevens Point, Plover, Whiting and Park Ridge).

Walking is perhaps the most basic form of transportation and an important accessibility component. Unlike driving, walking is more limited by travel time. People are only willing to walk approximately 10 minutes or less from one area to another. In considering this limit, the following analysis examines the number of urban core residents currently living around the four retail nodes considered in the driving analysis. Only the urban core population is used in the calculations as these residents are the most likely to have access to these the alternate forms of transportation². The walk time is calculated using an average walk speed of 3-miles per hour from a residence to the center of the retail node. The results are shown in Table 6.45.

Table 6.45: Retail Node Walking Accessibility for the 2000 Urban Core Population

Walk time for Year 2000 Portage County Residents	Stevens Point – Downtown		Stevens Point – Hwy 10 E. Commercial Area		Plover – 1-39 and CTH B Retail District		Proposed Crossroads Common	
	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core
Less than 5 Minutes	1,553	4.2%	245	0.7%	0	0.0%	0	0.0%
5 to 10 Minutes	3,394	9.1%	633	1.7%	222	0.6%	317	0.8%
10 to 15 Minutes	6,082	16.3%	564	1.5%	739	2.0%	702	1.9%
Total	11,029	29.6%	1,442	3.9%	961	2.6%	1,019	2.7%

The walk time analysis shows that Downtown Stevens Point clearly has the most residents within a reasonable walking distance. This is in contrast to the drive time analysis that showed all four retail nodes having similar resident percentages living within 15-minutes. Note that this analysis does not include pedestrian amenities such as sidewalks. The pedestrian-friendly nature of Downtown Stevens Point compared to the other areas would likely magnify these differences.

In addition to walk times around retail nodes, walk times for the urban core population to a bus route is calculated in Table 6.46. Interestingly, almost two-thirds of the urban core population lives within a 5-minute walk of a current bus route. However, Map 6.8 shows that the current bus system only serves two of the four retail nodes (Downtown Stevens Point and the Highway 10 E. Commercial Area).

Table 6.46: Bus Accessibility for 2000 Urban Core Population

Walk time to a Bus Route	Number of Residents Urban Core (2000)	Percent of Urban Core Residents (2000)
Less than 5 Minutes	23,857	63.9%
5 to 10 Minutes	4,117	11.0%
10 to 15 Minutes	1,846	4.9%
Total	29,820	79.9%

² Note – The urban core had a year 2000 population of 37,319

5. Employment Node Accessibility Considerations

The following analysis examines current employment node accessibility. This analysis examines the current distribution of the working population in regards to how well they could reach potential areas of employment. While the retail accessibility analysis examined both current and future accessibility, it is more difficult to project where the future labor force will reside in Portage County. This difficulty is due to the uncertain nature of the age structure that will comprise the future labor force and the amount of future travel in and out of the County for employment. Subsequently, only the accessibility to the current population is measured. However, the impact of the pending Highway 10 improvements is included as a future scenario to determine if driving times are significantly changed. In examining employment accessibility implications, the analysis makes the following assumptions:

- While employment is scattered throughout Portage County, four nodes provide the most potential space and accessible locations for new businesses in Portage County. The nodes include Downtown Stevens Point/UWSP, the Portage County Business Park, the Twin Towers Industrial Park in Plover (I-39 and CTH B) and the Amherst Business Park. These areas shown on Map 6.8 contain many existing employers, provide existing infrastructure and are currently designated for new development.
- The pending reconstruction of Highway 10 will impact accessibility and is factored into the analysis examining future accessibility. This analysis assumes that the terminus for the eastern portion of re-routed Highway 10 route will be at the current junction of I-39 and Highway HH. However, there may be additional road improvements or labor force shifts between the year 2000 and the year 2020 that could affect accessibility.
- While there is no upper age limit of the labor force, the analysis considers accessibility to the current population between the ages of 18 and 64. The assumption is that this age group will comprise the largest portion of the labor force.
- The analysis does not assess where people live versus where they work. Instead, it examines potential employee residences in regards to potential areas of employment.

6. Employment Node Automobile Accessibility for Portage County Residents (Ages 18 to 64)

As with retail accessibility, the private automobile is the preferred transportation choice for most employees. Furthermore, many residents do not choose where to live or work based solely on the length of their daily commute time. This trend may be reflected in Portage County given the increase in average commute time between 1990 and 2000. With the continued popularity of the automobile and this willingness to travel further, the analysis of employment accessibility includes drive time as one measure.

Again, automobile accessibility is defined by the drive time from a resident's home to a given employment node. Accordingly, Table 6.47 and Chart 6.17 examine drive times for current Portage County residents (ages 18 to 64) to the four employment nodes previously mentioned. The analysis uses the *current population distribution and existing road network* to determine the percentage of Portage County residents within different drive times. Again, these calculations are created using ideal driving conditions (limited traffic and stops).

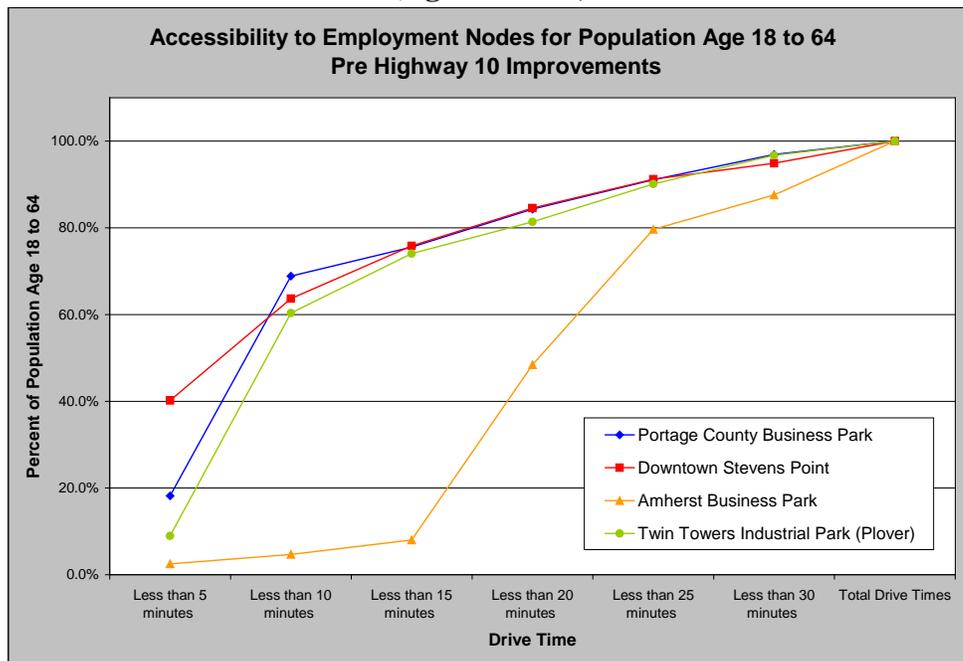
From a driving perspective, the accessibility analysis reveals a number of observations:

- Given its central location, Downtown Stevens Point has the largest percentage of potential employees within a five-minute drive. However, the Portage County Business Park, Twin Towers Industrial Park and Downtown Stevens Point all have similar percentages of employees within a drive time of 10 minutes or less.
- The more rural location of the Amherst Business Park makes it a longer drive for most potential employees living in Portage County. However, its location may draw more employees from other surrounding counties.
- With the exception of the Amherst Business Park, all employment nodes have similar distributions of working age population within a 15-minute drive.

Table 6.47: Employment Node Accessibility for the 2000 Population Distribution (Ages 18 to 64) Pre-Highway 10 Improvements

Drive Time for Residents Age 18 to 64 (Year 2000)	Portage County Business Park		Downtown Stevens Point		Amherst Business Park		Twin Towers Industrial Park (Plover)	
	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent
Less than 5 minutes	18.2%	18.2%	40.2%	40.2%	2.5%	2.5%	9.0%	9.0%
5 to 10 minutes	50.7%	68.9%	23.5%	63.7%	2.2%	4.7%	51.4%	60.3%
10 to 15 minutes	6.7%	75.6%	12.2%	75.8%	3.3%	8.0%	13.7%	74.1%
15 to 20 minutes	8.7%	84.3%	8.7%	84.6%	40.4%	48.4%	7.3%	81.4%
20 to 25 minutes	6.8%	91.1%	6.6%	91.2%	31.2%	79.6%	8.7%	90.1%
25 to 30 minutes	5.8%	96.9%	3.7%	94.9%	7.9%	87.6%	6.6%	96.7%
30 minutes or more	3.1%	100.0%	5.1%	100.0%	12.4%	100.0%	3.3%	100.0%

Chart 6.17 – Employment Node Accessibility for the 2000 Population Distribution (Ages 18 to 64)



To determine the impact of the Highway 10 improvements on employment node accessibility, Chart 6.18 and Table 6.48 repeat the accessibility analysis using the projected Highway 10 route (as previously mentioned). However, the analysis continues to use the current population distribution due to the constraints associated with projecting both age and employee movement.

In comparing the accessibility data before and after the Highway 10 improvements, a number of observations are apparent.

- The changes to Highway 10 will have the greatest impact on the Amherst Business Park and the Portage County Business Park. As these employment nodes are located at either end of the improvements, this observation is somewhat intuitive. The largest changes are seen in the 15-to-20 minute drive time segment for the Amherst Business Park (40.4% currently and 49.0% after improvements).
- The Highway 10 improvements should increase the ability of workers to reach Downtown Stevens Point and the Twin Towers Industrial Park in Plover. However, these increases are smaller than those seen with the Amherst Business Park and the Portage County Business Park.

Chart 6.18: Employment Node Accessibility for the 2000 Population Distribution (Ages 18 to 64). – Post Hwy 10 Improvements

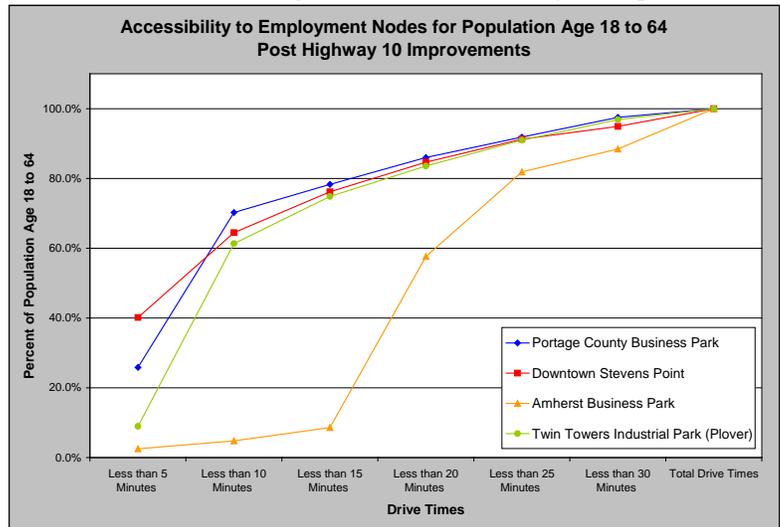


Table 6.48: Employment Node Accessibility for the 2000 Population Distribution (Ages 18 to 64) Post Hwy 10 Improvements

Drive Time for Residents Age 18 to 64 (Year 2000)	Portage County Business Park		Downtown Stevens Point		Amherst Business Park		Twin Towers Industrial Park (Plover)	
	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent	Percent of Population	Cumulative Percent
Less than 5 minutes	25.9%	25.9%	40.2%	40.2%	2.5%	2.5%	9.0%	9.0%
5 to 10 minutes	44.4%	70.2%	24.3%	64.5%	2.3%	4.8%	52.3%	61.3%
10 to 15 minutes	8.1%	78.3%	11.7%	76.2%	3.8%	8.6%	13.5%	74.8%
15 to 20 minutes	7.7%	86.0%	8.5%	84.7%	49.0%	57.6%	8.7%	83.6%
20 to 25 minutes	5.8%	91.8%	6.6%	91.3%	24.2%	81.9%	7.4%	91.0%
25 to 30 minutes	5.7%	97.5%	3.7%	94.9%	6.6%	88.4%	5.9%	96.9%
30 minutes or more	2.5%	100.0%	5.1%	100.0%	11.6%	100.0%	3.1%	100.0%

7. Pedestrian and Public Transit Accessibility for Urban Core Residents Age 18 to 64

As with retail accessibility, the availability of public transportation or pedestrian amenities does not mean that potential employees will use these alternate forms of transportation. Again, if these alternate forms of transportation are inaccessible, then it is even more unlikely that these modes will be used. Accordingly, the following analysis examines the location of employment nodes relative to alternative transportation options in the urban core of Portage County (Stevens Point, Plover, Whiting and Park Ridge).

Similar to the walking analysis for retail nodes, people are only willing to walk approximately 10-minutes or less between areas. Given this limit, the following analysis examines the number of urban core residents age 18 to 64 currently living around the four employment nodes considered in the driving analysis. Only the urban core population is used as these residents are the most likely to use the alternate forms of transportation (Note: values for the Amherst Business Park were calculated, but not expressed as a percentage)³. The walk time is calculated using an average walk speed of 3-miles/hour from an employee’s residence to the center of the employment node. The results are shown in Table 6.49.

Table 6.49: Employment Node Walking Accessibility for the 2000 Urban Core Population (Age 18 to 64)

Walk time for Population Age 18 to 65 (Year 2000)	Portage County Business Park		Downtown Stevens Point		Amherst Business Park		Twin Towers Industrial Park (Plover)	
	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core	Number of Residents	Percent of Urban Core
Less than 5 Minutes	0	0.0%	1,247	5.0%	5	N/A	0	0.0%
5 to 10 Minutes	162	0.6%	2,390	9.5%	308	N/A	0	0.0%
10 to 15 Minutes	343	1.4%	4,786	19.1%	230	N/A	60	0.2%
Total	505	2.0%	8,423	33.5%	543	N/A	60	0.2%

Similar to the retail walk time analysis, Downtown Stevens point has the most potential employees within a reasonable walking distance. This is in contrast to the drive time analysis that showed all four retail nodes having similar resident percentages living within 15-minutes. Note that this analysis does not include pedestrian amenities such as sidewalks. Subsequently, the pedestrian-friendly nature of Downtown Stevens Point compared to the other areas would likely magnify these differences.

Table 6.50: Bus Accessibility for the 2000 Urban Core Population (Age 18 to 64)

Walk time to a Bus Route for Residents Age 18 to 65	Number of Residents Urban Core (2000)	Percent of Urban Core Residents (2000)
Less than 5 Minutes	16,288	64.9%
5 to 10 Minutes	2,757	11.0%
10 to 15 Minutes	1,148	4.6%
Total	20,193	80.4%

Walk times to a bus route are calculated for potential employees in the urban core. Table 6.50 shows that almost two-thirds of the urban core population lives within a 5-minute walk of a current bus route. However, Map 6.8 shows that the current bus system only serves one employment node (Downtown Stevens Point). Accordingly, bus travel is unlikely for many employees.

8. Current Distribution of Driving Sensitive Populations

As previously stated, one goal established by the comprehensive planning grants is to provide transportation for all citizens, including transit-dependent citizens. Providing accessibility to all citizens requires knowing where these potentially transit-dependent residents live. Accordingly, this analysis examines the geographic distribution of two categories of potentially transit-dependent residents: households without cars and the population age 65 and older.

³ Note – The urban core had a year 2000 Age 18-64 population of 25,108

Households may not own a car either due to personal choice or necessity. However, residents in these households will be dependent on alternate forms of transportation including walking and public transit. This dependency will be true for both work and shopping opportunities. Currently, public transportation is only available in the urban core. Residents without a car that live outside of this service area must depend on other alternatives. Table 6.51 and Map 6.9 depict the distribution of these households.

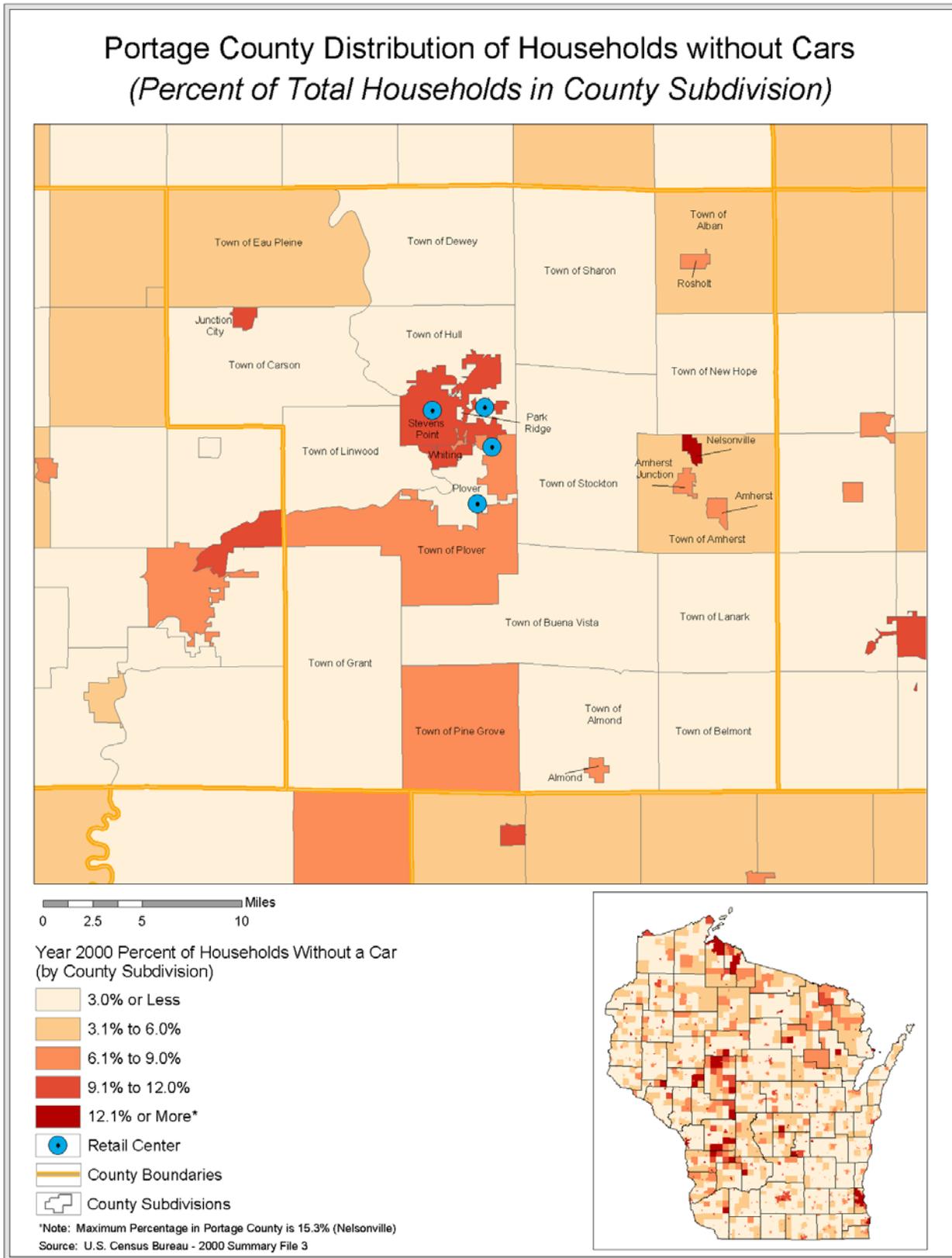
Overall, only a small percentage (5.8%) of Portage County households does not own a car. In individual communities, the largest percentage is found in Nelsonville with 15.3% of the households. Yet this higher percentage only accounts for 11 total households. The largest number of households without a car is found in Stevens Point. This large number is likely due to the large student population and also has the best potential access to alternate transportation modes. With 119 households Plover has the second largest number of households without cars. While these households only account for 2.9% of Plover’s total, currently these households do not have access to public transportation.

Table 6.51: Distribution of Households without a Car – Year 2000

Community Name	Occupied Households	Number of Occupied Households without a Car	Percent of Occupied Households without a Car
Nelsonville	72	11	15.3%
Whiting	679	77	11.3%
Stevens Point	9,295	886	9.5%
Junction City	165	15	9.1%
Rosholt	212	16	7.5%
Amherst Junction	99	7	7.1%
Town of Pine Grove	304	21	6.9%
Amherst	402	27	6.7%
Almond	181	12	6.6%
Town of Plover	798	52	6.5%
Town of Alban	306	18	5.9%
Town of Eau Pleine	343	15	4.4%
Town of Amherst	501	16	3.2%
Plover	4,040	119	2.9%
Town of Carson	470	13	2.8%
Town of Sharon	722	19	2.6%
Town of Grant	732	17	2.3%
Town of Hull	2,009	46	2.3%
Town of Buena Vista	430	9	2.1%
Town of Stockton	986	20	2.0%
Town of Dewey	359	7	1.9%
Town of Linwood	387	7	1.8%
Town of Almond	282	4	1.4%
Park Ridge	210	2	1.0%
Town of Lanark	545	5	0.9%
Town of Belmont	232	0	0.0%
Town of New Hope	279	0	0.0%
Portage County Total	25,040	1,441	5.8%

Source: U.S. Census Bureau

Map 6.9: Distribution of Households without Cars – Year 2000



Residents age 65 and over present another potential driving sensitive population. While many residents in this age group are still able to drive, their ability to do so may decline as they age. In fact many of these residents will outlive their ability to drive. If these residents live alone or are in rural areas, they will need alternate forms of transportation to reach daily goods and services.

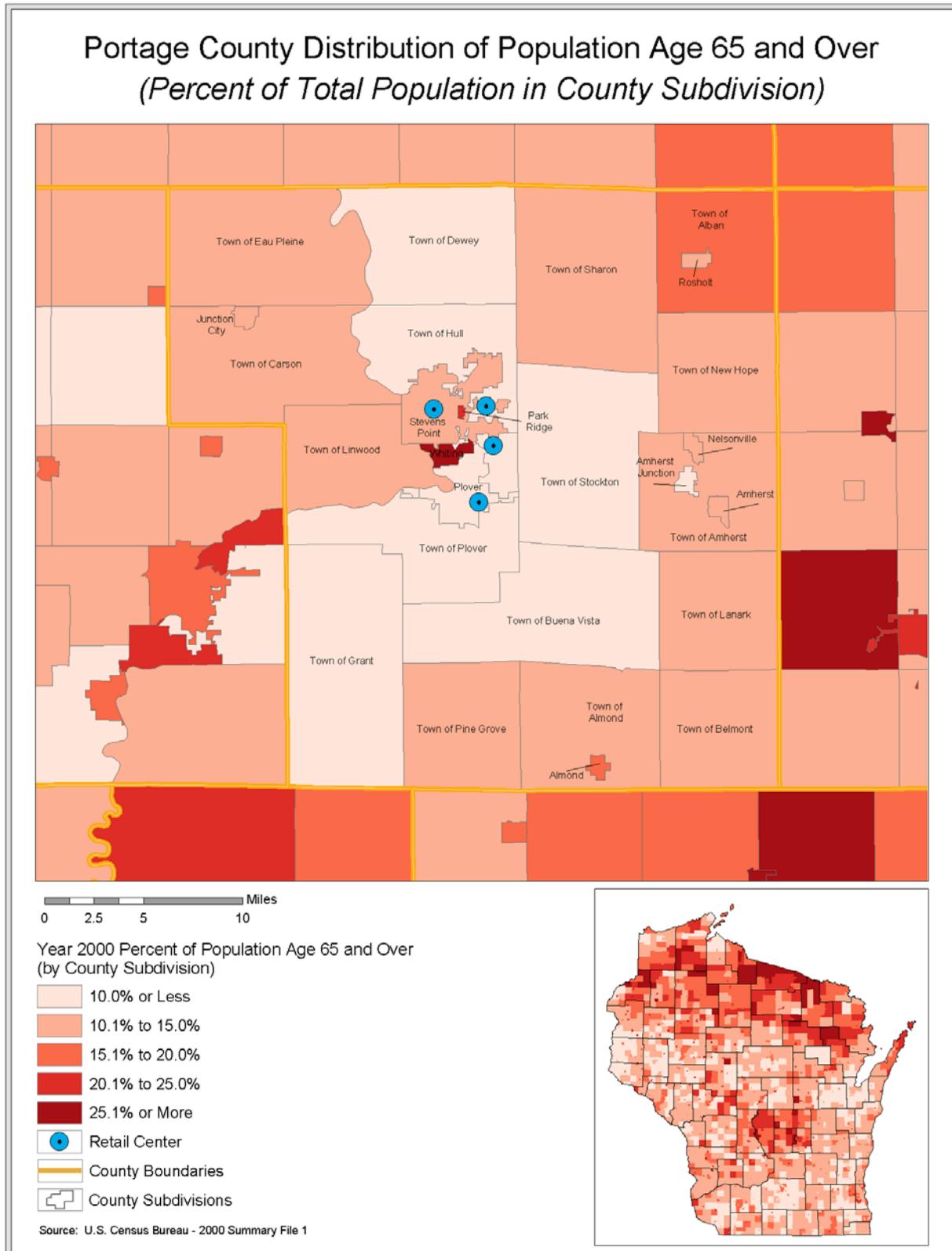
As shown earlier in this Chapter, Portage County has a smaller percentage of people age 65 and over than either the State of Wisconsin or the United States. However, Table 6.52 and Map 6.10 show that some areas in Portage County have high concentrations of residents in this age group. The two communities with the largest percentages are Whiting and Park Ridge. Furthermore, Stevens Point has the largest number of older residents. As these communities are located in the Urban Core, they may be well positioned to serve these residents' needs. However, the remaining elderly residents are scattered throughout the rural areas of the county and may pose a larger challenge. The challenge of providing these rural residents with basic goods and services may be particularly important when considering their limited availability and future potential for convenience items addressed in Section 6.6.

Table 6.52: Distribution of the Population Age 65 and Over – Year 2000

Community Name	Total Population	Population Age 65 and Over	Percent of Population Age 65 and Over
Whiting	1,760	470	26.7%
Park Ridge	488	119	24.4%
Almond	459	73	15.9%
Town of Alban	897	138	15.4%
Town of New Hope	736	109	14.8%
Town of Eau Pleine	931	133	14.3%
Rosholt	518	70	13.5%
Town of Belmont	623	80	12.8%
Junction City	440	56	12.7%
Town of Amherst	1,435	180	12.5%
Town of Lanark	1,449	181	12.5%
Amherst	964	119	12.3%
Stevens Point	24,551	2,980	12.1%
Town of Sharon	1,936	226	11.7%
Town of Almond	679	77	11.3%
Town of Carson	1,299	144	11.1%
Nelsonville	191	21	11.0%
Town of Pine Grove	904	98	10.8%
Town of Linwood	1,111	120	10.8%
Town of Dewey	975	93	9.5%
Town of Buena Vista	1,187	106	8.9%
Town of Grant	2,020	174	8.6%
Town of Hull	5,493	472	8.6%
Town of Stockton	2,896	226	7.8%
Town of Plover	2,415	185	7.7%
Amherst Junction	305	21	6.9%
Plover	10,520	683	6.5%
Portage County Total	67,182	7,354	10.9%

Source: U.S. Census Bureau

Map 6.10: Distribution of Population Age 65 and Over – Year 2000



B. Additional Business Location Considerations

The location of new commercial growth is often described as part of the natural development process. That is, commercial development is responding to the needs of the market that reflect decisions made by businesses, commuters and shoppers about where to work, live, and shop. As a result, businesses and developers respond to these preferences and the pattern of new growth will continue to follow demand. The resulting challenge is to encourage growth that is both responsible and able to meet the needs of current and future businesses, employees and shoppers.

The following discussion attempts to identify some considerations and potential impacts of new business locations in Portage County. The focus of this discussion is on retail and office space as new industrial space will most likely locate in the designated areas of Portage County's business and industrial parks.

1. Downtown/Infill versus Urban Edge Development

Fundamentally, new retail or office space can be located through infill or at the urban edge. While infill can occur throughout a city, downtown is a likely location for infill business development in many cities. Recognizing the importance of downtown, the Portage County Comprehensive Planning Joint Steering Committee identified downtown revitalization as a top issue for the economic development element.

Downtown development has a number of land use and fiscal advantages including the preservation of land on the urban edge and the use of existing infrastructure. Despite these advantages, there will be a limited number of sites available for development in any downtown. Therefore, there may be a need for new development to occur on the urban edge in addition to downtown. In addition, the availability of sites downtown does not mean that downtown will be a viable development option. In fact, there are a number of problems associated with downtown development that generally make it easier to develop on the edge.

To become a viable development option, it is important to understand the development process that makes downtowns more difficult to develop. Understanding the process and uncovering potential obstacles will allow Portage County communities to remove barriers and promote growth in downtowns. It is important to note that the development process and potential obstacles are not isolated to retail. With their potential for mixed uses, barriers to downtown development must be expanded to consider other commercial opportunities. Some potential barriers to downtown development include:

Higher Land Costs – Purchase costs per square mile are typically higher in downtown. These costs may result from the need to assemble multiple properties or parcels to create a suitable site. Conversely, land on the edge may be larger and create a simple land purchase.

Title Problems – Given the potential history of uses, downtown properties often present complex title issues.

Complex and Time Consuming Permit Process – Proposed downtown projects often require a complexity of permits and may pose conflicts between permit and code requirements, and historic preservation guidelines.

More Restrictive Zoning – Redeveloping a downtown building may require a change of use, which triggers additional review under local zoning procedures. Specifically, buildings on small downtown lots may not meet zoning requirements for setbacks or parking. Seeking a variance or zoning change can be costly and/or time consuming.

Site Preparation – Downtown construction can involve demolition of existing structures, while preparing a suburban lot could require little more than clearing trees. The chances are considerably greater that downtown projects will consider environmental hazards (i.e. brownfields) or other unforeseen complications.

Construction Complexity – Downtown building projects often bring complex challenges such as scheduling issues, crane and staging needs, planned utility outages, and employee parking.

Building Size – Bigger buildings can be built on the urban edge. Often, the bigger a new building, the lower its square-foot costs for leasing. Often these sites allow national retailers to meet their standardized building requirements or other businesses to meet their size needs.

Parking Availability – Providing sufficient parking downtown for employees and customers can be a zoning, convenience and cost issue. Suburban lots provide the potential for overcoming these problems.

While many of these barriers are inherent in locating downtown, a number of these issues can be overcome. Particularly, regulatory issues such as zoning, permits and building codes can be reviewed and amended to promote downtown development.

2. Potential Retail Development Conflicts

The goals of the comprehensive planning process are often in opposition. Potential conflicts are perhaps the most apparent in future retail development. The following discussion uncovers a number of potential conflicts that will need to be addressed through the creation of priorities.

Competition and Commercial Renewal

Section 6.6 noted that Portage County had a 2001 retail sales surplus of \$59 million. As previously mentioned, this surplus is not a surprise given the position that the urban core has as a regional commercial destination. Given future trends, Portage County has the opportunity to maintain or expand this regional commercial position. However, Portage County is surrounded by a number of commercial centers. The proximity of Wausau, Wisconsin Rapids, Appleton and Portage allows these areas to compete for customers within reasonable driving distances. New commercial development is a chance for Portage County to reinvent itself as a regional shopping destination, expand the tax base, provide new jobs and fill unmet consumer demand.

However, new commercial growth can either fill an existing demand gap or re-allocate existing demand. It is likely that new commercial growth will succeed if located and positioned properly (especially with the presence national retailers). However, if future retail development does not fill an existing gap or increase the regional draw of the area, the economic success will likely come at the expense of existing, less competitive retailers. The potential impact could be an increased vacancy rate in other retail nodes, resulting in a swap of space rather than an expansion. Accordingly, the need for new commercial development should be considered with regards the proposed business mix of the new development and its potential to impact specific retail categories in the community or region.

Sense of Place

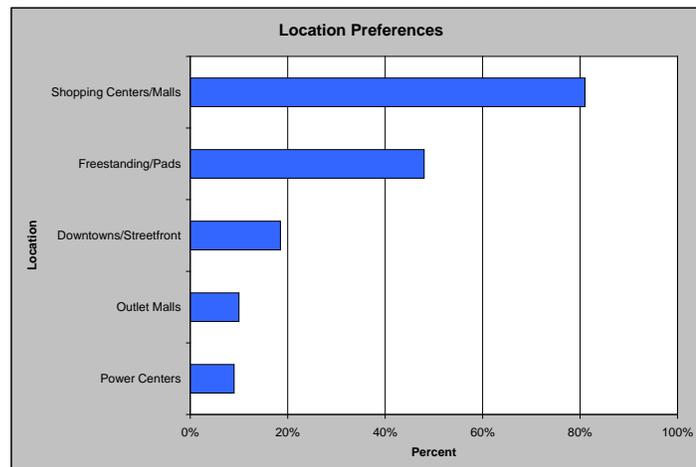
Similar to the potential impact on the transportation element, decisions regarding future economic development have the potential to impact the Utilities and Community Facilities

element of the Portage County comprehensive plan. A guiding principle of the Utilities and Community Facilities element is to create “Design standards used to enhance the urban and rural character” (as stated by the Urban Area and Rural Comprehensive Plan Steering Committees). If new development is dominated by strip development, big boxes, or chains with rigid building formulas, it will be difficult for design standards to promote urban and rural character while meeting the requirements of these retail formats. That is not to suggest that these simultaneous goals cannot be accomplished, but do present have potential conflicts.

Downtown Development and Location Preferences of Retailers

National retail chains continue to increase their market share over independent retailers. As chains seek to expand, many chains are looking to smaller regional market areas such as Portage County. While these chains provide a good chance of success and new opportunities for Portage County, it is unlikely that most chains will consider downtown as a viable location.

Chart 6.19: Preferred Location of Chains in Wisconsin



Source: 2000 Crittenden Directory of Retail Space

Chart 6.19 summarizes the preferred location format of chains that consider Wisconsin as a potential market. Note that a retailer could consider more than one format (i.e. downtown or a shopping center) and these multiple preferences are reflected in the numbers accordingly.

The chart shows that the most commonly preferred locations are found in shopping centers and on freestanding pads. These two formats are often found near the urban edge. (While downtown malls do exist, as in Stevens Point, it is increasingly uncommon to find successful malls located downtown). A third retail format found on the urban edge is the power center. Power centers are large strip malls typically anchored by multiple regional and national big box retailers (i.e. Menard’s, Best Buy, Office Depot, Lowe’s, Wal-Mart, etc). While the percentage of retailers considering power centers is lower, this is likely due to the comparatively small number of power centers available for development. Furthermore, the number of big box retailers that consider power centers is likely much larger.

In comparison to other location options, the data shows that only 18% of these chains consider a downtown or a streetfront location. While this will vary by chain and city, the prospect for chains locating in Portage County downtowns is somewhat reduced. Accordingly, for downtown development to be successful in Portage County, it will be necessary to reconcile the types of development and business mix that could succeed in Portage County downtowns. Several strategies for downtown development include:

- Targeted niche development focusing on specialty store types or consumer segments (such as UWSP students or downtown employees).
- Tourism-based development.
- Mixed-use development that focuses on housing, office space, entertainment and services in addition to retail.

Opportunities for Smaller Communities versus the Urban Core

Given its population and critical mass of retailers, it is likely that most new retail development will occur in the urban core. However, smaller communities still have needs and preferences for retail development. Accordingly, these communities must seek to differentiate themselves as potential shopping destinations. Small communities could address this through strategies such as convenience, tourism or niche market development. Individual communities should explore alternate retail strategies that best fit the individual community's needs or goals.

3. Office Location Considerations

Increasingly, company location decisions depend on the type of company. According to a recent ULI report on Corporate Location and Smart Growth, companies looking to site a headquarters or R&D facility prefer places where they can find a pool of educated workers or can attract workers from an existing corporation. In contrast, the main factor for companies looking to locate call centers or labor-intensive production facilities is lower cost⁴. While these points do not address specific locational considerations in Portage County, they do raise issues regarding the types of businesses and economy that Portage County would like to attract. More specifically, New Economy based businesses and traditional economy businesses have different locational preferences that can be addressed through planning.

As noted in the introduction, the future direction Portage County's economy has yet to be determined. However, if the future direction includes the recruitment of office-based or new economy type businesses, there are a number of considerations that can be implemented by addressing the locational desires of these companies. According to a report by the James Irvine Foundation, the New Economy is not about high-tech or a particular set of businesses. Instead it is about a set of competitive advantages faced by all industries. More specifically, the New Economy is about speed, quality, flexibility, knowledge and networks. The New Economy is about applying knowledge and new business methods in a wide variety of products and services (including agriculture, manufacturing, business services and retail)⁵. Accordingly, new economy businesses are not limited to one or two industries and can include companies ranging from software development, to internet/mail order to business services.

Businesses looking to apply these competitive advantages often have a number of locational preferences within a community or a region. More specifically, new economy businesses value the vital centers of regions, towns and neighborhoods. These are places that have public spaces, restaurants and originality. Furthermore, these places promote sociability and are filled with areas for interaction. This desire does not simply apply to large urban areas and could include areas of Portage County. The potential of positioning downtowns for New Economy businesses is particularly relevant for smaller companies or startup companies. These businesses may be ideal for fitting into small, old or eccentric spaces in downtown.

An additional office locational consideration is the proximity of amenities (regardless of downtown/infill or urban edge development. A joint 1999 study by BOMA International (Building Owners and Managers Association) and the Urban Land Institute (ULI) examined

⁴ Frej, Anne. Corporate Location and Smart Growth. Urban Land Institute Land Use Policy Forum. Washington D.C. April 8-9, 2002.

⁵ Henton, Doug and Kim Welsh. *Linking the New Economy to the Livable Community*. James Irvine Foundation, April 1998.

the locational features that office tenants preferred. The relative importance of these locational amenities is examined in Table 6.52.

It should be noted that most of these considerations are related to accessibility of some sort. Currently, downtown Stevens Point provides the largest number of these amenities and may provide a good locational opportunity for new office space. If Downtown Stevens Point does not meet the needs of potential new businesses, these amenities could be provided around other development nodes in a mixed use fashion.

Table 6.52: Importance of Office Location Amenities

Locational Feature	Importance (% of respondents)
Proximity to Business Services	87%
Proximity to Where Employees Live	81%
Proximity to restaurants/retail/personal services	81%
Proximity to Clients	76%
Proximity to Public Transportation	69%

Section 6.8 Rural Vision Statement for Economic Development

A. Rural Area Vision Statement Related to Economic Development: *(Adopted 6-26-02 by the Rural Area Steering Committee)*

In 2025, Portage County enjoys a healthy, thriving economy. It recognizes that economic vitality is the foundation for continued community progress and livability. The community has developed a reputation as a highly desirable place to work and do business because of its well-educated work force and high quality of life. The community is supportive of homegrown and small businesses. It actively targets companies that offer good employment prospects, draw from the local labor pool and are good corporate citizens. Residents have many options to earn livable wages and enjoy rewarding work.

Key Vision Ideas for Economic Development:

- Economic development centers around promoting and maintaining locally based companies.
- Job creation efforts focus primarily on attraction of job opportunities that provide living wages for families and youth living in Portage County.
- Businesses may be assisted through incentive programs or other similar mechanisms.
- Design standards are established and enforced.
- New business development is focused toward existing villages and planned settlement areas and the reuse of vacant lots and buildings.
- Recognize and support the role of agribusiness in the economy of our community.
- New manufacturing or industrial growth is directed toward existing or planned businesses/industrial parks or areas.
- Tourism is an important element in the rural economy.

Section 6.9 Economic Development Issues and Conclusions

The following issues were identified during the comprehensive planning process:

1. Encourage the Portage County Business Council to profile the rural areas of Portage County to better promote their differing opportunities?
 - *Municipalities must work more closely with the Portage County Economic Development Committee, as well as the Portage County Business Council to identify local needs for economic development and promote business development Countywide.*
 - *Work on education of how County economic development works, what committees are working on and where residents can take their concerns to be addressed.*
 - *Define the roles between the Portage County Economic Development Committee, the Portage County Business Council, and different communities.*
2. How can municipalities support regional economic development efforts with limited local funding?
 - *Work with the Portage County Business Council, University Extension, the Wisconsin Potato and Vegetable Growers Association and other interested parties to promote rural economic development.*
3. How can the Portage County Business Council better promote the rural areas of Portage County?
 - *Work toward establishing procedures for economic development planning, and come up with priorities for economic development in the rural areas. Work toward better promotion of agricultural related businesses.*
 - *Work toward stronger marketing programs for the rural areas of Portage County.*

Section 6.10 Guiding Principle and Preliminary Goals for Economic Development

A. Guiding Principle for Economic Development:

Promote the stabilization and expansion of the current base and the creation of a range of employment opportunities.

B. Economic Development Preliminary Goals: (adopted 10-23-02 by the Rural Area Steering Committee)

- A central economic organization actively maintains growth and information resources in the community.
- Ensure adequate resources are allotted for economic development efforts.
- Ensure that an adequate skilled workforce is available through retention and recruitment for our business community.
- Coordinate Public and Private educational efforts to maximize the investment in our workforce.
- Planned development areas are identified and/or established throughout the County.
- Support commerce and tourism throughout the County.
- Identify and preserve productive agricultural land Countywide.
- Identify and prioritize the needs of the business community.
- Promote the stabilization and expansion of the current economic base and the creation of a range of employment opportunities.