














# LIFE at Work



## Highlighted Indicators

Current	Trend	
		Median household and per capita income
		Cost of Living Index
		Annual unemployment rate
		Business leader perception of availability of qualified workers
		Passengers and freight at Outagamie Regional Airport

Good	
Fair	
Poor	
Not rated	

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### ***“Excellence” for the Fox Cities is defined as:***

Community members of all types experience:

- An economy that offers a lifelong continuum of job and career training opportunities
- Pathways from school to work
- Employment opportunities that enable them to support an acceptable quality of life for their families
- A growing economy that attracts and maintains an available, skilled, and motivated workforce
- A regional vision of economic growth that is explicit, widely shared, and pursued through partnerships

# LIFE at Work

The pages listed below contain data from published sources presented in this section. Results from the Community and Leader surveys, sector expert groups, and community focus groups are also presented on most pages.

<u>Page</u>	<u>Data Shown</u>
<b>Earnings and Wages</b>	<i>Median household income*</i> <i>Per capita income*</i> Income distribution Median wage and trends for selected jobs
<b>Cost of Living</b>	<i>Cost of Living Index*</i> Median home sales price Local property tax rates
<b>Economy</b>	Largest employers Tourism revenues Employment by industry sector Foreclosure rates
<b>Economic Development</b>	New business start ups Building permits (residential/commercial) New housing starts
<b>Employment</b>	<i>Annual unemployment rate*</i> Change in employment by industry sector
<b>Workforce Excellence</b>	Educational attainment of area workforce Labor force participation rate <i>Business leader perception of availability of qualified workers*</i>
<b>Transportation</b>	<i>Passengers and freight at Outagamie Regional Airport*</i> Average commute time Use of public transportation

\* *Highlighted Indicator*

***For more information on work and economic topics:***

- Bureau of Labor Statistics, <http://stats.bls.gov/home.htm>
- Current wages by employment sector, <http://www.bls.gov/bls/blswage.htm>
- Fox Cities Chamber of Commerce and Industry <http://www.foxcitieschamber.com>
- Local foreclosure data <http://www.realtytrac.com>
- New North, Inc. <http://www.thenewnorth.com>
- Unemployment statistics, [http://dwd.wisconsin.gov/oea/xls/wi\\_msa\\_quick\\_table.xls](http://dwd.wisconsin.gov/oea/xls/wi_msa_quick_table.xls)
- Wisconsin County Workforce Profiles, [http://dwd.wisconsin.gov/oea/county\\_profiles/](http://dwd.wisconsin.gov/oea/county_profiles/)
- Wisconsin Department of Workforce Development, <http://worknet.wisconsin.gov/worknet/datablelist.aspx?>

# Earnings and Wages

## Data Highlights

- Figure 1** The median household income ranged from \$50,184 in Winnebago County to \$61,227 in Calumet County, compared to Wisconsin (\$51,257) and U.S. (\$51,639). In Wisconsin and the U.S., median household income grew slightly since 2005-07 (U.S. Census). Note: three year income estimates by county from earlier years are not available.
- Per capita income in 2007-09 in Outagamie (\$26,847) and Winnebago (\$26,118) counties closely matched the Wisconsin average (\$26,403) and lagged the U.S. (\$27,100), while income in Calumet County exceeded all the areas (\$27,590). Per capita income grew by 4% to 5% locally compared to only 3% in Wisconsin and 4% in the U.S. since 2005-07 (U.S. Census).
- Figure 2** The average weekly wage for all occupations in Outagamie County was \$746 in 2010. The weekly wage for all occupations in the county rose by 10% between 2005 and 2010, compared to Wisconsin (13%). 2010 wages in the area for leisure services were only \$227 each week (Wisconsin Worknet).
- Figure 3** The gap between highest and lowest wage-earners was smaller in the Fox Cities area than in the U.S. but is widening at a faster rate. Locally, the highest quintile out-earned the lowest quintile 10 to 1 in Outagamie and Winnebago Counties, compared to 15 to 1 in the U.S. However, this gap had increased by 7% to 10% locally since 2005-07, compared to only 5% in WI and the U.S. during the same time.
- In 2005, 70% of leaders we surveyed put “increasing jobs that pay higher wages” as a highest priority for the area, in 2010, 72% did the same.

## Progress and Concerns

Household and per capita incomes are moving in the right direction, albeit slowly, and household income is just above the state of Wisconsin and the U.S. average. Per capita income, while trailing other regions, is growing faster locally. Wages for leisure services jobs, a growing part of the economy, have remained fairly flat. Leaders continue to set the creation of higher paying jobs as the highest priority for the region. A concerning trend across the U.S. is the widening gap between middle to low wage-earners and the highest wage earners. Locally, while the gap is still smaller than elsewhere, it is growing faster. A wider income gap is associated with a shrinking middle class and declining quality of life for those with lower incomes.

Figure 1

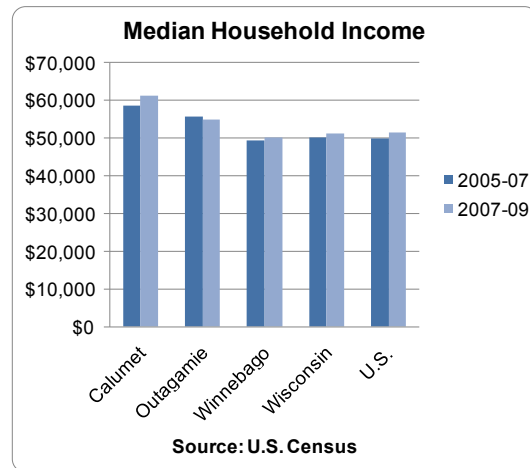


Figure 2

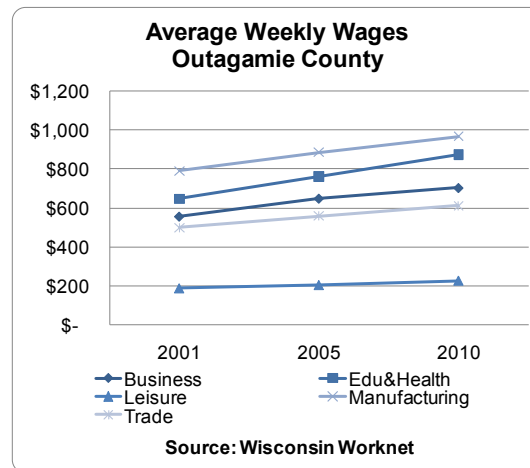
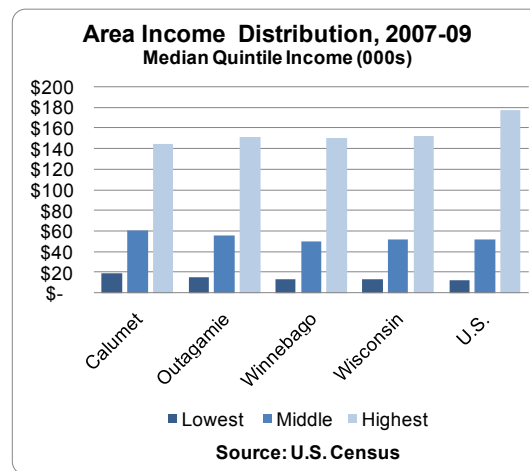


Figure 3



*66% of community members and 72% of leaders scored “increasing high paying jobs” as one of the highest Fox Cities area priorities*

# Cost of Living

Figure 1

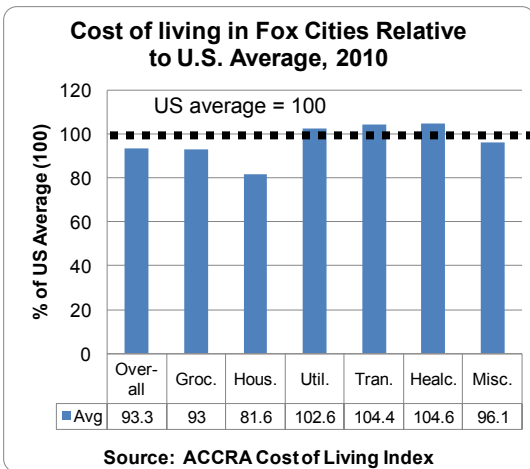


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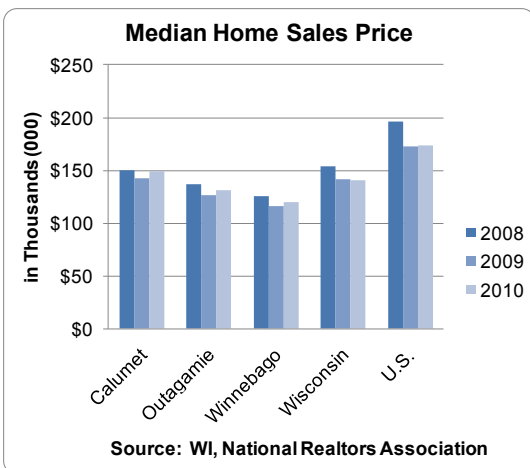
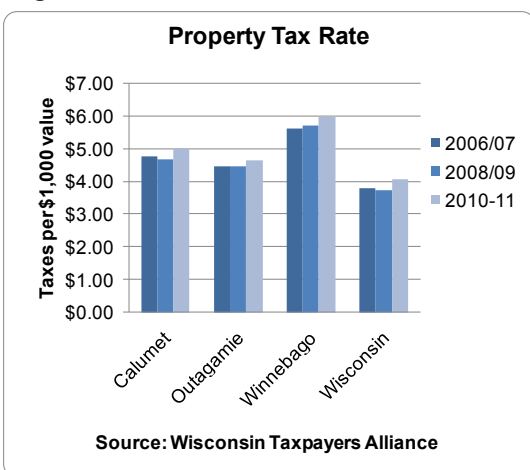


Figure 3



## Data Highlights

- Figure 1** According to the American Chamber of Commerce Research Association (ACCRA) Cost of Living Index, groceries, housing, and miscellaneous items cost less in the Fox Cities than the U.S. average, while utilities, transportation, and healthcare match U.S. levels. In 2010, the overall index was 93, the same as it was in 2005.
- Figure 2** In the Fox Cities area, the median home sales price ranged from \$148,000 in Calumet County to \$120,000 in Winnebago County, having declined between 2007-09 but rebounding in 2010. The U.S. median home sales price was \$174,000 in 2010.
- Figure 3** 2010-11 Outagamie County property taxes per \$1,000 assessed home value were \$4.63, virtually unchanged since 2005-06. In Winnebago County they have risen to \$5.99, a 7% increase since 2005-06. Both are above the Wisconsin average of \$4.06.
- Figure 4** In the Fox Cities area, since 2006, the weekly cost of childcare (in a group facility) for an infant has increased 20% and the rate for 3-4 year olds had increased 26%. The 2010 costs amount to approximately 10%-11% of area median household income (Child Care Resources & Referral).

Figure 4

Weekly Average Childcare Costs by County		
	Infant	Child ages 3-4
Calumet	\$162-\$188	\$145-\$159
Outagamie	\$157-\$206	\$147-\$174
Winnebago	\$161-\$205	\$146-\$175
Wisconsin	\$165-\$209	\$152-\$179

Child Care Resources & Referral, Inc.

## Progress and Concerns

The overall cost of living in the area continues to be lower than in the U.S. and property taxes have remained stable. Yet the cost of childcare poses a great challenge for lower-to-middle income households, as the weekly rate for one child comes to one-tenth of a family's household income. Although no national average cost of childcare was available, the area is comparable to Wisconsin.

88% of leaders rated the Fox Cities good or excellent at providing the quality of life features that attract businesses and employees

# Economy

## Data Highlights

- **Figure 1** Shown are the major employers in the area as reported by the Fox Cities Chamber of Commerce and Industry, 2011. An average of just over 200,000 adult residents were in the workforce in 2007-09 in the three-county area.
- In Outagamie County in 2010, 143,312 people were employed, a 2% decline from 2005.
- **Figure 2** The three counties in the Fox Cities area have varied economies, although all three employ the largest segment of their workforce in manufacturing followed by trade and transportation as well as education, healthcare, and social services. The local economies are similar to the make-up of Wisconsin overall, but compared to the U.S., they rely more heavily on manufacturing and less on professional, scientific, education, and healthcare sectors. Employment trends are shown on the next page.
- **Figure 3** Nearly 2,000 homes in the three county area were in some stage of foreclosure in the spring of 2011, and since 2006, that number had tripled. Experts on our work sector panel shared concerns about pockets of the community where vacant homes led to neighborhood deterioration.

Figure 1

Top 10 Major Fox Cities Employers		
	2005	2011
ThedaCare	5,000	4,400
Affinity Health System	4,300	4,300
Kimberly Clark	5,782	2,100
Thrivent Financial	1,719	1,800
Pierce Manufacturing	1,500	1,800
Plexus	2,200	1,800
Appleton Papers	2,500	1,425
Miller Electric		1,400
Outagamie County		1,200
Winnebago County		1,100

Source: Fox Cities Chamber of Commerce & Industry

Figure 2

Employment by Industry, 2007-09					
	Calumet	Outagamie	Winnebago	WI	US
Ag/Construction	10.2%	8.1%	5.8%	9%	9%
Manufacturing	30.0%	22.5%	23.3%	19%	11%
Trade, transp, util.	15.6%	19.3%	19.8%	19%	20%
Info, finance, insur.	7.5%	9.4%	6.5%	8%	9%
Prof, scientific, mgt.	6.3%	8.5%	8.2%	8%	11%
Educ, health, social	17.5%	17.2%	20.2%	22%	22%
Arts, entertain, recrea.	7.5%	8.3%	9.1%	8%	9%
Other	5.4%	6.8%	7.1%	7%	10%

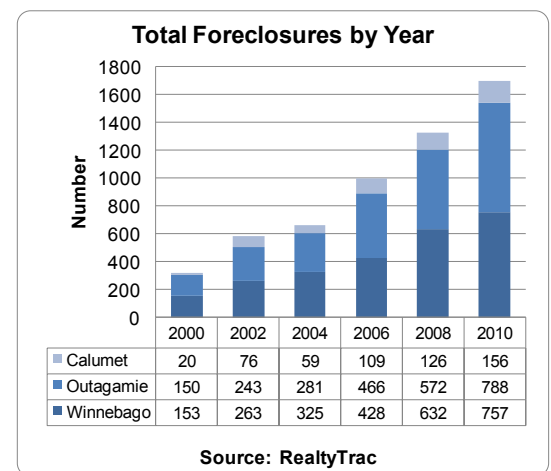
Source: U.S. Census, 2007-09

## Progress and Concerns

Indicative of the economic times, total employment in the largest eight employers is down over the five year period 2006 to 2011 (from 23,100 to 17,625 respectively). Yet the area experiences a good cross section of industries making up the top 10, including healthcare, financial services, paper, manufacturing, and government. The area clearly has a strength in the manufacturing sector compared to the state of Wisconsin and the U.S. and, in contrast, has a smaller percent working in the education, health, and social services sector.

Across the U.S., the high rate of home foreclosures is a concern (national rates could not be identified). Communities are impacted with declines in property values and deterioration of vacant properties and neighborhoods. Locally, efforts are underway by lenders and nonprofits to *prevent* foreclosures.

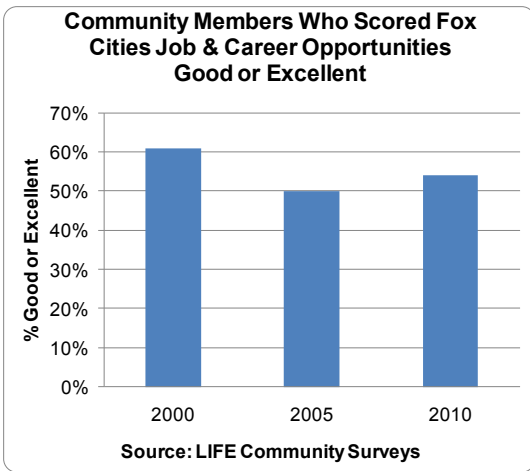
Figure 3



*75% of the community and 79% of leaders scored the area good or excellent at building a strong economy*

# Economy, cont.

**Figure 1**



## Data Highlights

- Figure 1** In looking at trends over the past 10 years, in 2000, 61% of community members felt that the Fox Cities area was Good or Excellent at offering jobs and career opportunities for area residents. In 2005 the percentage dipped to 50%, compared to 54% in 2010.
- Figure 2** Although the economic impacts of tourism fell 11% between 2008 and 2009, 2010 saw a slight increase, when tourists spent over \$363 million in the Fox Cities, supporting 5,613 jobs and \$7.6 million local tax revenues.
- Figure 3** Compared to 2005, community members remained consistent in their views about the economy—scoring most items just above average.
- 66% of community members and 72% of area leaders surveyed indicated that an area priority should be to create more jobs that pay higher wages.

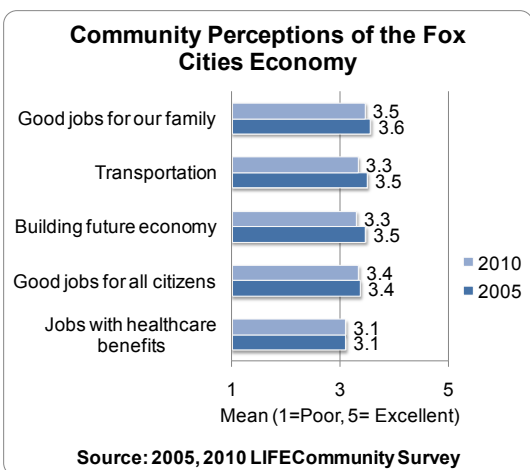
**Figure 2**

	2008	2009	2010
Total Expenditures	\$403,280,000	\$359,290,000	\$363,510,000
Employment (FTE)	6,203	5,535	5,613
State Tax Revenue	\$26,350,000	\$23,490,000	\$23,640,000
Local Tax Revenue	\$8,580,000	\$7,610,000	\$7,680,000

Source: Fox Cities Convention and Visitors Bureau

- Sector panel experts consistently emphasized the importance of creating jobs that pay higher wages and indicated that the area could develop a more coordinated approach in attracting new business. They concurred that over time, the area has lost several locally-owned businesses, leading to less civic involvement and community support by organizations with corporate headquarters out of the area. Finally, they agreed that political polarization that characterizes all levels of government in recent times has made it difficult to make agreements and work together to create opportunities for the area.

**Figure 3**



## Progress and Concerns

Tourism has a major economic impact on the region; in 2009 and 2010, the sector remained steady in terms of employment and revenues. Area residents were feeling slightly more positive about the jobs and career opportunities available in the area in 2010 when compared to in 2005, although their ratings were still lower than they were in 2000.

*54% of community members rated the Fox Cities above average at providing jobs and career opportunities with a good standard of living*

# Economic Development

## Data Highlights

- **Figure 1** 1,171 new businesses were started in the three county area in 2010 (InfoUSA.com). Note: this data will be tracked in future years.
- **Figure 2** The dollar value of commercial building permits in the area dropped by half between 2008 and 2010. The number and value of residential permits issued has held fairly steady for the past two years despite the national recession (Fox Cities Chamber of Commerce & Industry).
- In 2010, 420 new homes were built in the Fox Cities area, compared to 537 in 2008 (Fox Cities Chamber of Commerce & Industry).
- **Figure 3** Leaders rated Fox Cities economic issues similarly to how they scored them in the 2005. On a scale from 1 (Poor) to 4 (Excellent), the area scored highly on how well it created the business infrastructure and for having features that attract businesses (3.2), with lower scores on protecting worker well-being (2.9), collaboration and equal employment (2.8), building a future economy (2.7) and attracting young professionals (2.5).
- New North is a non-profit economic development organization representing 18 counties in Northeast Wisconsin. Through collaboration, its goal is to “harness and promote the region’s resources, talents, and creativity for the purposes of sustaining and growing the regional economy.” Key initiatives include developing talent (including diverse talent), encouraging educational attainment, implementing targeted growth opportunities, supporting an entrepreneurial climate, and leveraging a regional brand.
- The development and economic impact of a proposed Exhibition Center in downtown Appleton is currently being studied.

## Progress and Concerns

While the economic downturn has dampened business development (as shown by a rate of commercial building that is half what it was in 2008), the area continues to develop strong programs to support new business development and over 1,100 new businesses began in the three county area in 2010. The Venture Center at Fox Valley Technical College has helped launch scores of new businesses since it opened in 2005 to offer educational support for entrepreneurs. Area experts indicate that a comprehensive regional strategy is needed to support economic development, and the Fox Cities Chamber of Commerce & Industry is currently developing just such an initiative to engage the community.

Figure 1

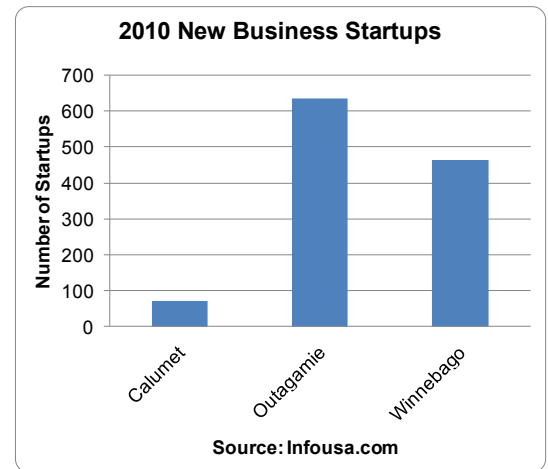
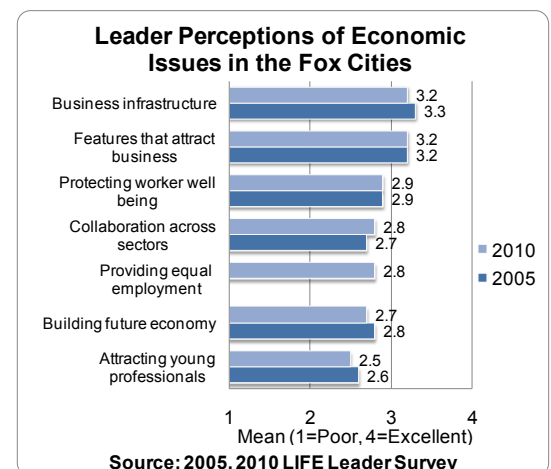


Figure 2

Building Permits in Fox Cities Area				
	Commercial Industrial		Residential	
	Num	\$ Value (millions)	Num	\$ Value (millions)
2002	880	\$215		N/A
2005	1,084	\$190		N/A
2008	707	\$214	537	\$104
2009	556	\$144	429	\$ 74
2010	628	\$107	420	\$ 75

Source: Fox Cities Chamber of Commerce & Industry

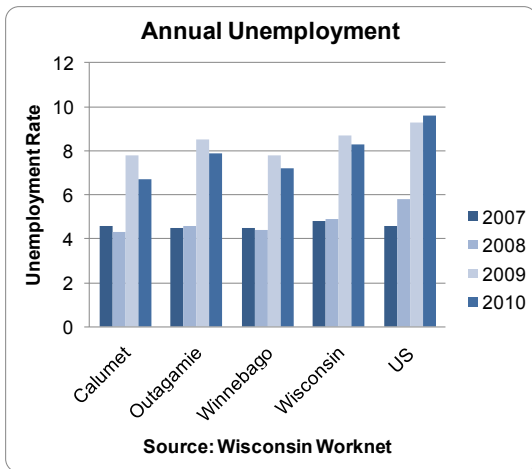
Figure 3



*89% of leaders rated the Fox Cities good or excellent at providing the infrastructure that businesses need*

# Employment

Figure 1



## Data Highlights

- **Figure 1** Across the US and locally in 2008, the unemployment rate rose. In Northeast Wisconsin, however, unemployment rates were lower (7-8%) than in the U.S. (9.6%). By 2010, county rates had declined slightly: Calumet (6.7%), Outagamie (7.9%), and Winnebago (7.2%).
- **Figure 2** The total number employed in non-farm positions in Outagamie County in 2010 (101,460) grew 1% since 2005. Mining/construction and manufacturing jobs showed losses over the time period, while employment in the services showed increases.
- Similar to 2005, in 2010 community members gave moderate ratings to the availability of jobs with health care benefits: on a scale from 1 (Poor) to 5 (Excellent), in both years, community members scored the area 3.1 (Average).

Figure 2

	2000	2005	2010	Change 2000-2010
Natural Resource, Mining	757	789	716	-5%
Construction	8,121	8,258	6,691	-18%
Manufacturing	20,710	19,100	17,489	-16%
Trade, Transportation, Utilities	21,158	20,870	20,587	-3%
Information	n/a	n/a	2,034	n/a
Financial Activities	5,991	6,767	6,619	10%
Prof & Business Services	9,165	11,370	11,190	22%
Education & Health	12,908	15,810	17,487	35%
Leisure & Hospitality	7,865	9,386	9,692	23%
Other Services	3,271	3,568	3,824	17%
Public Administration	2,710	2,927	3,121	15%

Source: Wisconsin Worknet

- In July, 2011, *Forbes* magazine named Appleton #40 in the U.S. as one of the 'Best Small Places for Business and Careers.'
- 63% of leaders believed that the Fox Cities area does a Good or Excellent job at providing equal employment opportunities for all (including women, ethnically diverse residents, and those with disabilities).
- 88% of leaders perceived that the area does a Good or Excellent job providing the quality of life features to attract businesses and employees to the area, and 47% gave similar ratings to how the area is doing at attracting and retaining young professionals.

## Progress and Concerns

The economy in the Fox Cities area shows balanced employment across the sectors and a shift to the services, away from manufacturing and durable goods (a nationwide trend). Many of the service occupations are found in the health care and leisure sectors. Leaders were very optimistic that the area is doing well providing quality of life features to attract business and employees. The community shows concern about the availability of jobs with health care benefits. A major goal of the federal Affordable Health Care Act of 2010 was to expand access to health insurance, so if the act is fully implemented, access to jobs with health care may improve.

31% of community members scored the Fox Cities good or excellent at providing jobs that offer health care benefits

# Workforce Excellence

## Data Highlights

- Figure 1** In 2007-09 the percent of adults with a Bachelor's degree or higher in Calumet County was 25%, Outagamie County 25% and Winnebago County 24%. This number was slightly higher in the area since 2005-07 estimates. The U.S. rate was 28% in 2007-09 and Wisconsin, 26%. Between 9 to 10% of area adults had an Associate's degree compared to 8.5% in Wisconsin and 7.5% nationally (2007-09 U.S. Census).
- Figure 2** The labor force participation rate in Outagamie County (73%) exceeds the U.S. average for adults (65%), and 68% of women work, compared to 60% in the U.S.
- Figure 3** In 2011, Fox Valley Technical College awarded 41% more technical diplomas than it did in 2005, while the number of Associate Degrees rose slightly.
- Experts in the Education and Economy sectors were concerned about alignment between K-12 education and job-readiness for students who did not plan to attend college. These young people often do not relocate after high school and are a significant portion of the workforce.
- Similarly, participants in the Economy sector panel expressed concerns about the skills of some members of the workforce. Job openings are sometimes not filled due to inability of businesses to find well-skilled workers, especially those with sophisticated technical, social and problem-solving skills.
- 63% of employers participating in the Fox Cities Chamber of Commerce and Industry annual outlook survey reported that the availability of qualified workers was good or excellent, compared to only 41% in 2008. The percentages from previous years are as follows: 2002 (34%), 2004 (65%), and 2006 (61%) (Chamber of Commerce).

## Progress and Concerns

Education is vital for the emerging economy, where cognitive and team skills are highly valued. The educational attainment of area adults matches the U.S. average when Associate Degrees are considered, but attainment of Bachelors Degrees locally lags the U.S. While local employers currently see a good supply of qualified workers, our expert panel cited an emerging concern that the preparation and skills of the current workforce do not match well with the needs of employers. This emerging concern, they felt, might be addressed by collaborating to develop training and educational programs that align with the needs of local employers.

Figure 1

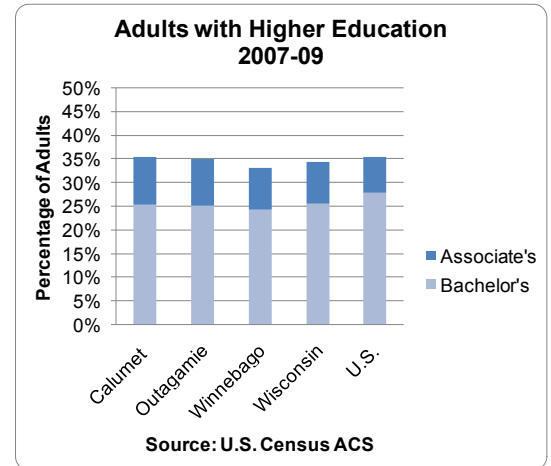


Figure 2

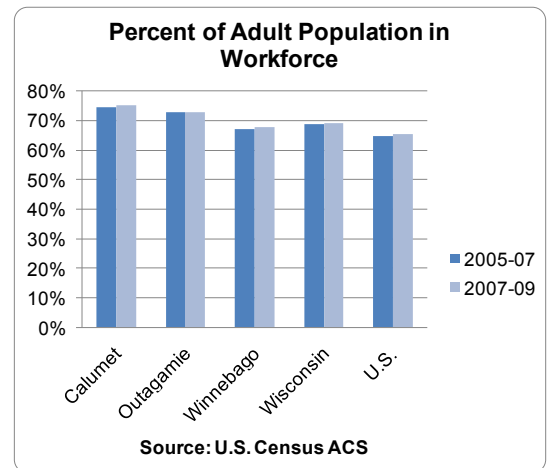
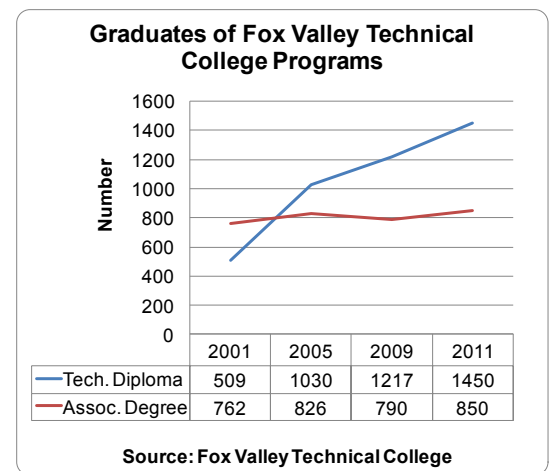


Figure 3



*47% of leaders scored the Fox Cities area good or excellent at attracting, cultivating, retaining and rewarding young professionals*

# Transportation

## Data Highlights

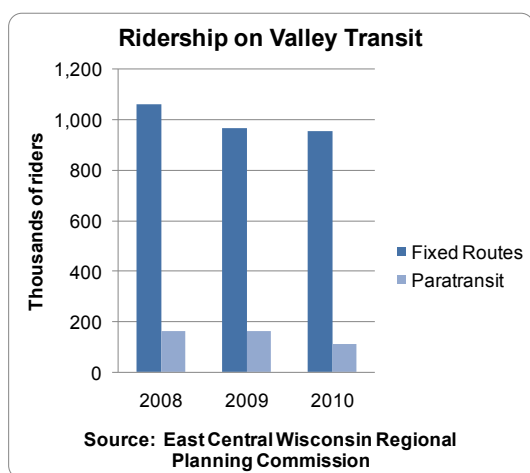
Figure 1

Outagamie County Regional Airport Annual Statistics				
	2008	2009	2010	% change 2008-2010
Total passengers	528,015	534,335	560,660	6%
Total Freight (lbs.)	31,153,868	19,763,890	25,962,484	-17%
Flights (total landings)	8,869	7,319	7,606	-14%

Source: Fox Cities Chamber of Commerce and Industry

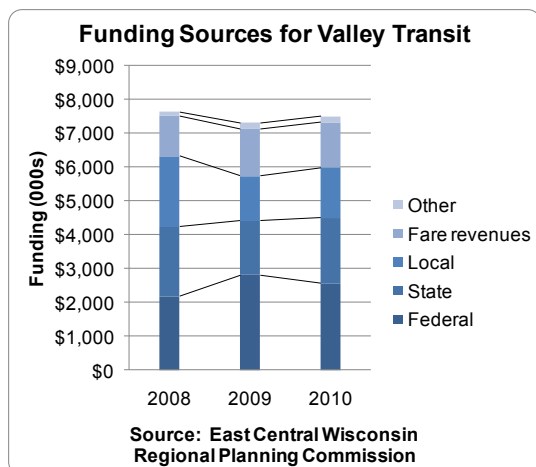
- **Figure 1** The Outagamie County Airport saw a 6% increase in total passengers between 2008 and 2010, while freight and total flights had declined.
- **Figure 2** Fixed route ridership on Valley Transit declined by about 10% between 2008 and 2010, while paratransit rides declined by 30%, however the system still provided over 1 million rides in total.

Figure 2



- **The Connector**, a Fox Cities Regional Transportation initiative, has provided more than 46,000 rides to individuals since it began in 2007. The service improves access (geographic and hours of operation) primarily for people with low incomes so that they have reliable transportation to their place of employment.
- **Figure 3** Approximately 80% of Valley Transit revenues come from federal, state, and local funding.
- Average commuting time has risen in the Fox Cities area yet remains shorter than the U.S. average. Local residents commuted to work in 18-20 minutes, compared to the US average 25 minutes. Most commuters traveled alone.
- Community members' ratings of the overall transportation system (roads, traffic, bus service) in the Fox Valley area inched up in 2010, when 44% scored it Good/Excellent compared to 42% in 2005 and 32% in 2000.
- 53% of leaders in 2010 felt that the area was Good or Excellent at providing a transportation system that meets the needs of all residents.

Figure 3



## Progress and Concerns

The Connector has been a successful community initiative to ensure that persons with poor access to automobiles can have a reliable, efficient, affordable means to get to work, especially individuals working the evening shift. The program is a joint initiative of United Way Fox Cities and Valley Transit, relying on government and philanthropic dollars to remain in operation. As we go to press, federal funding for Valley Transit may be reduced due to population growth in the metro area. Likewise, Wisconsin's 2012-2013 budget decreased state transit funding by 10% and shifts the funding for transit into the General Fund, where it must compete for funding with other programs (Milwaukee Journal Sentinel, 2011).

44% of community members rated the overall transportation system in the Fox Cities area (roads, traffic, bus service) good or excellent