



IN PARTNERSHIP WITH



ENVIRONMENTAL SCAN

March 2016

Environmental Scanning is a necessary tool for planning the long-term strategic direction of Moraine Park Technical College. This process can help proactively define the opportunities, potential threats, or areas of change that will impact the college from internal and external environmental factors. This external trend information can help the college overall, as well as individual teams, and support the development and implementation of goals and strategies.

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The Moraine Park Technical College District covers a predominately rural area of 2,450 square miles in east-central Wisconsin, comprised of all of Fond du Lac and Green Lake counties, most of Dodge and Washington counties, and portions of six other counties.

The data represented in this report highlights economic, workforce, and demographic facts for Fond du Lac, Green Lake, Dodge and Washington Counties.

ECONOMIC OVERVIEW

Number of Jobs History: 2011-2015

Region	2011 Jobs	2015 Jobs	% Change
Fond du Lac County	49,633	52,733	6% Grew faster than state
Green Lake County	7,602	7,449	-2%
Washington County	55,311	59,092	7% Grew faster than state
Dodge County	36,849	38,435	4%
Wisconsin	2,949,149	3,082,238	5%
United States	145,974,891	156,106,469	7%

What's Trending: 2016-2020

Region	2016 Jobs	2020 Jobs	% Change
Fond du Lac County	53,017	54,323	2%
Green Lake County	7,478	7,652	2%
Washington County	59,953	63,157	5% Projected growth faster than state & U.S.
Dodge County	38,795	40,124	3%
Wisconsin	3,104,415	3,200,400	3%
United States	157,815,880	163,641,613	4%

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW) plus Non-QCEW Employees plus Self-Employed; as of 3rd Quarter 2015)

QCEW data: Is a virtual census of nonagricultural employees and wages. About 47% of all workers in agricultural industries are covered. Jobs that are exempt or not covered by Unemployment Insurance Law are not included. Suppressions have been removed by EMSI.

Non-QCEW data: Includes jobs not covered in QCEW such as military & railroad jobs, some non-profit and religious workers, certain salespersons and misc. government workers.

Self-Employed: Covers people who when responding to the Census surveys, consider self-employment to be significant part of their income.

ECONOMIC OVERVIEW

JOB HISTORY AND TRENDS

WHAT DOES IT MEAN?

From 2011 to 2015, EMSI, an economic modeling software, showed a job growth rate for the four MPTC district counties slightly higher than the state at 5.6% vs. 5%. The figures shown on page 3 represent a comprehensive or complete job picture including not only QCEW or jobs covered by unemployment insurance, but also self-employed and miscellaneous jobs (military, railroad, religious workers, some nonprofit and government jobs, and certain sales jobs).

Washington and Fond du Lac Counties had the highest job growth (7% and 6% respectively) during the past five years. This growth was also higher than the state rate at 5%. Green Lake County jobs declined during this timeframe at -2%. Although the MPTC district counties and state job growth rates were positive, our local and state job growth was slower than the United States overall (7%).

What's trending for 2016-2020? Per EMSI modeling and projections, job growth will slow down for the four counties, the state, and the United States. When combined, the four MPTC counties will grow 4% vs. the state at 3%, consistent with U.S. figures (4%). Only Washington County is projecting a faster growth rate than others from 2016-2020 at 5%, however this is 2% lower than the past five years. Green Lake lost jobs in the past but is projected to return to 2011 job levels by 2020.

MPTC IMPACT

The past job growth implied industry need or desire for expansion and a growing trust in the improving market. As jobs grow and unemployment decreases, post-secondary enrollments tend to decline. Jobs have been available for MPTC graduates and the non-traditional market is employed, thus not seeking re-training at the high degree as seen previously. However, as employers feel confident in the market, corporate training dollars may have increased.

Projections show job growth will be slowing locally, statewide, and nationally in the next five years. What will this mean for employment opportunities for graduates and enrollments for MPTC? If the job market gets tighter and unemployment rises, will enrollments increase? Will employers cut back on corporate training? How can the College assist Washington County employers since this county has the highest projected job growth into 2020?

ECONOMIC OVERVIEW Job History 2011-2015

Fastest Growing Occupations: FOND DU LAC County

Occupation	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2014 Median Earnings (per hour)
Medical Assistants	209	291	82	39%	\$15.37
Welders, Cutters, Solderers, and Brazers	326	433	107	33%	\$19.27
Team Assemblers	942	1,222	280	30%	\$11.10
Machinists	341	432	91	27%	\$22.20

Fastest Growing Industries: FOND DU LAC County

Industry	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2015 Earnings Per Worker (annually)
Offices of Physicians (except Mental Health Specialists)	645	1071	426	66%	\$123,450
Motor Vehicle Electrical & Electronic Equipment Manufacturing	249	412	163	66%	\$60,553
Other Engine Equipment Manufacturing	2,103	2,619	516	25%	\$82,020

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW**Job History 2011-2015****Fastest Growing Occupations: GREEN LAKE County**

Occupation	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2014 Median Earnings (per hour)
Food Batchmakers	17	23	6	35%	\$12.10
Packaging and Filling Machine Operators &Tenders	42	57	15	35%	\$12.87
Electricians	26	32	6	23%	\$22.48
Automotive Service Technicians & Mechanics	57	69	12	21%	\$16.44

Fastest Growing Industries: GREEN LAKE County

Industry	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2015 Earnings Per Worker (annually)
Medical Equipment and Supplies Manufacturing	36	71	35	97%	\$58,809
Golf Courses and Country Clubs	68	115	47	69%	\$21,348
Other Cut and Sew Apparel Manufacturing	97	152	55	57%	\$41,132

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

Fastest Growing Occupations: WASHINGTON County

Occupation	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2014 Median Earnings (per hour)
Personal Care Aides	503	851	348	69%	\$11.01
Home Health Aides	129	206	77	60%	\$11.17
Computer-Controlled Machine Tool Operators	425	522	97	23%	\$17.17
Machinists	609	731	122	20%	\$18.25
Team Assemblers	861	999	138	16%	\$13.37

Fastest Growing Industries: WASHINGTON County

Industry	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2015 Earnings Per Worker (annually)
Other Misc Food Manufacturing	100	557	457	458%	\$77,735
Metal Crown, Closure & Other Metal Stamping	40	196	156	390%	\$47,318
Services for the Elderly and Persons with Disabilities	80	305	225	281%	\$21,545

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW Job History 2011-2015

Fastest Growing Occupations: DODGE County

Occupation	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2014 Median Earnings (per hour)
Operating Engineers & Other Construction Equipment Operators	242	344	102	42%	\$25.08
Construction Laborers	410	514	104	25%	\$18.49
Packaging & Filling Machine Operators & Tenders	412	507	95	23%	\$13.84
Personal Care Aides	375	444	69	18%	\$11.42

Fastest Growing Industries: DODGE County

Industry	2011 Jobs	2015 Jobs	Change in Jobs (2011-2015)	% Change	2015 Earnings Per Worker (annually)
All Other Food Manufacturing	100	557	457	458%	\$77,735
Services for the Elderly and Persons with Disabilities	80	305	225	281%	\$21,545
Other General Merchandise Stores	112	257	145	129%	\$21,330

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW What's Trending 2016-2020

Fastest Growing Occupations: FOND DU LAC County

Occupation	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Medical Assistants	309	350	41	13%
Personal Care Aides	994	1,053	59	6%
Registered Nurses	721	764	43	6%
Team Assemblers	1,191	1,250	59	5%

Fastest Growing Industries: FOND DU LAC County

Industry	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Warehouse Clubs and Super-centers	225	313	88	39%
Other Commercial and Service Industry Machinery Manufacturing	1,763	2,276	513	29%
All Other Miscellaneous General Purpose Machinery Manufacturing	344	433	89	26%

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW What's Trending 2016-2020

Fastest Growing Occupations: GREEN LAKE County

Occupation	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Sewing Machine Operators	83	99	16	19%
Heavy and Tractor-Trailer Truck Drivers	277	305	28	10%
Retail Salespersons	169	186	17	10%
Registered Nurses	196	209	13	7%

Fastest Growing Industries: GREEN LAKE County

Industry	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Warehouse Clubs and Superstores	195	268	73	37%
Motor Vehicle Body Manufacturing	37	49	12	32%
Other Cut & Sew Apparel Manufacturing	165	213	48	29%
General Medical & Surgical Hospitals (show 8% but 44 new job change)	544	588	44	8%

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW What's Trending 2016-2020

Fastest Growing Occupations: WASHINGTON County

Occupation	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Personal Care Aides	891	996	105	12%
Heavy and Tractor-Trailer Truck Drivers	1,367	1,512	145	11%
Nursing Assistants	703	771	68	10%
Retail Salespersons	2,029	2,199	170	8%

Fastest Growing Industries: WASHINGTON County

Industry	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Warehouse Clubs and Super- centers	812	1,087	275	34%
Home Health Care Services	320	417	97	30%
Steel Investment Foundries	849	1,056	207	24%
All Other Miscellaneous Food Manufacturing	614	750	136	22%

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW What's Trending 2016-2020

Fastest Growing Occupations: DODGE County

Occupation	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Personal Care Aides	468	530	62	13%
Operating Engineers & Other Construction Equipment Operators	358	401	43	12%
Laborers and Freight, Stock, and Material Movers, Hand	961	1,058	97	10%
Construction Laborers	527	575	48	9%

Fastest Growing Industries: DODGE County

Industry	2016 Jobs	2020 Jobs	Change in Jobs (2016-2020)	% Change
Reconstituted Wood Product Manufacturing	155	230	75	48%
Site Preparation Contractors	380	491	111	29%
General Warehousing and Storage	794	1,007	213	27%

Source: EMSI (Quarterly Census of Employment & Wages Employees (QCEW), Non-QCEW Employees, and Self-Employed; as of 3rd Quarter 2015)

ECONOMIC OVERVIEW

FASTEST GROWING OCCUPATIONS & INDUSTRIES 2011–2015 & 2016–2020

WHAT DOES IT MEAN?

Although the overall percentage change in jobs will be slowing in the next five years, some industries and occupations have and will continue to grow at a faster rate than others. Again, this analysis includes a complete picture of employment from QCEW covered employees to those who are self-employed.

Manufacturing and medical related jobs primarily represented the fastest growing occupations from 2011-2015 (based on % change) among all four MPTC district counties. This makes sense since both industry sectors employ the most workers in our communities (see pages 14-15). The 2011-2015 fastest growing occupations included medical assistants, personal care aides, home health aides, machinists, team assemblers, computer-controlled machine tool operators, and welders. The sectors supporting these occupations also reflected the fastest growing industries with a few exceptions such as services for the elderly, golf courses, and general merchandise stores. Dodge County stood out with having high growth primarily in construction related occupations.

What's trending? Most of the fastest growing occupations from 2016-2020 (based on % change) will be health related (registered nurses, medical assistants, personal care aides, nursing assistants) among all four counties. Although there are several manufacturing industry sectors elevating to the fastest growing list, only lower paid manufacturing jobs are showing high percentage changes such as team assemblers, sewing machine operators, and general laborers/material movers. Dodge County continues to have projected growth in construction related industries and occupations. One industry that shows job growth into 2020 that shows up in three of the four counties is Warehouse Clubs/Supercenters. This industry includes centers such as Walmart. As smaller general merchandise stores decline, jobs appear to be shifting to the supercenter type retailers.

MPTC IMPACT

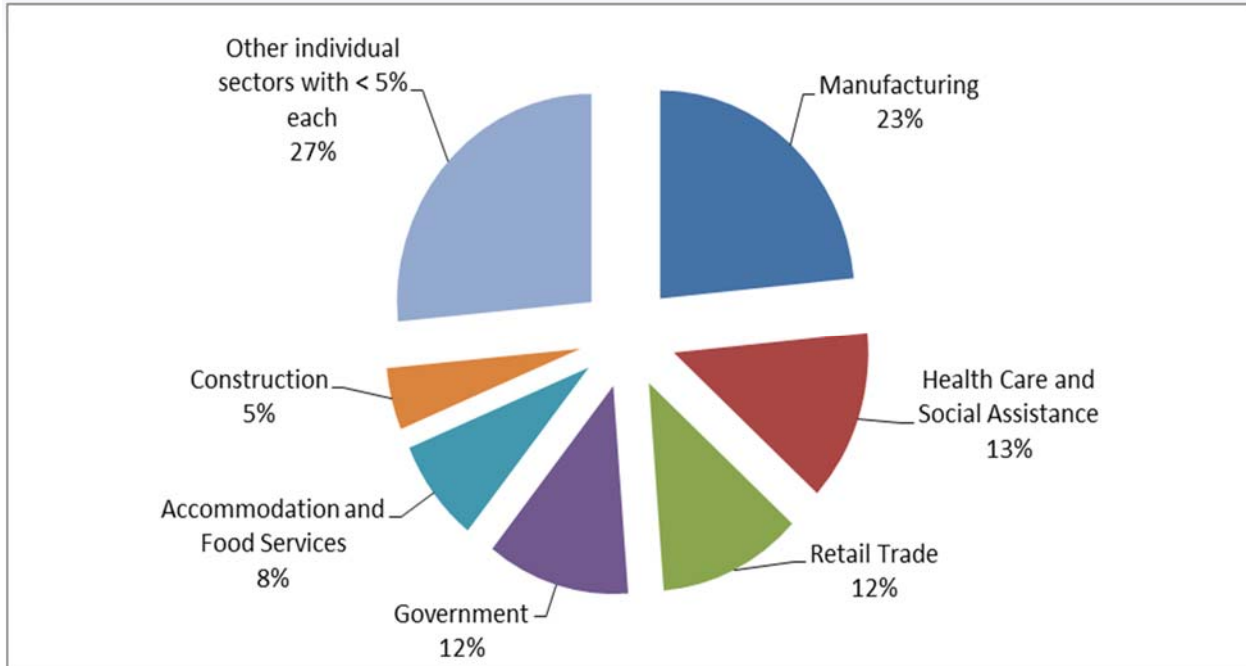
Analyzing the fastest growing occupations and industries can provide proactive training insights and opportunities for Moraine Park academic program deans as well as the Economic and Workforce Development department. Many of the fastest growing occupations and industries align with many of the programs Moraine Park currently offers. But, is there additional programming or training needed to fill those growing needs for some occupations and industries?

For the fastest growing industries, special staffing reports can be created with the EMSI software tool to do a deeper dive and determine employment needs for companies in that sector. For example, Commercial & Service Industry Machinery Manufacturing in Fond du Lac County will have a 513 change in jobs. The greatest job demands include: team assemblers, welders, first line supervisors, computer controlled machine tool operators, and mechanical engineers. How can MPTC proactively cultivate employers' job and training needs?

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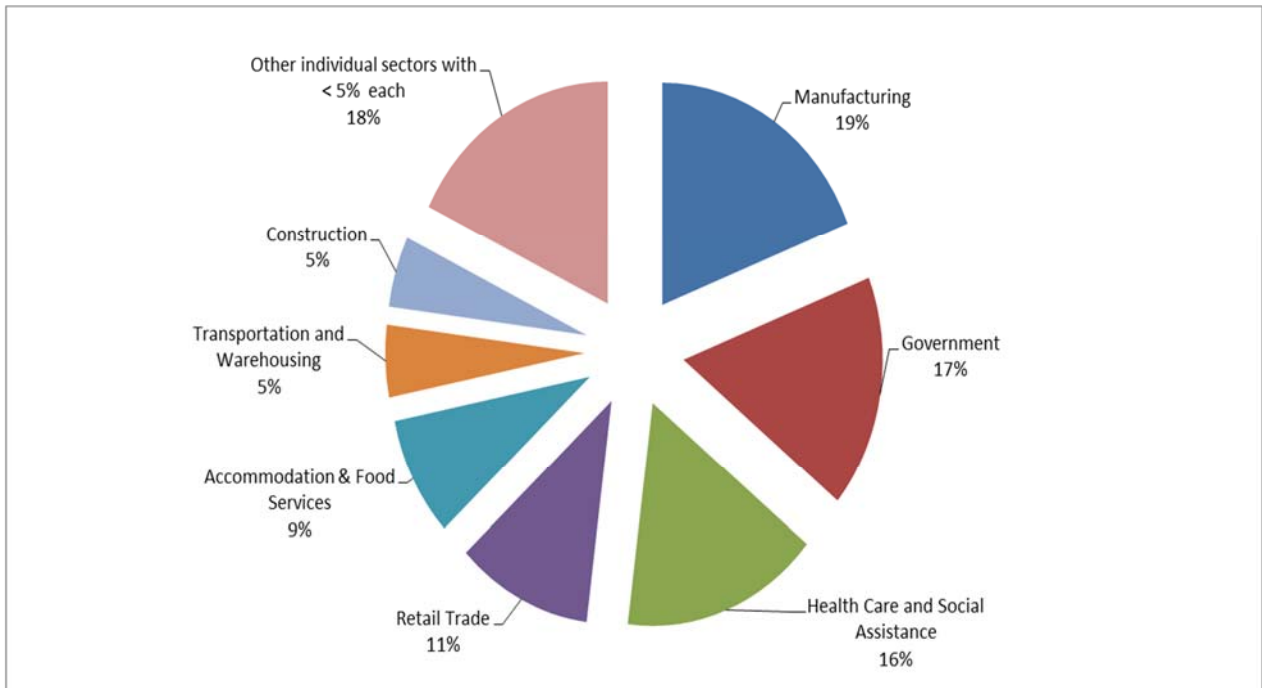
2015 Employment by Industry-What sectors employ the most workers?

FOND DU LAC COUNTY



Use pages 12-15 to evaluate jobs. For example, manufacturing is only 7% of all business establishments in FDL County (pg 14), however this sector employs the most workers at 23%.

GREEN LAKE COUNTY

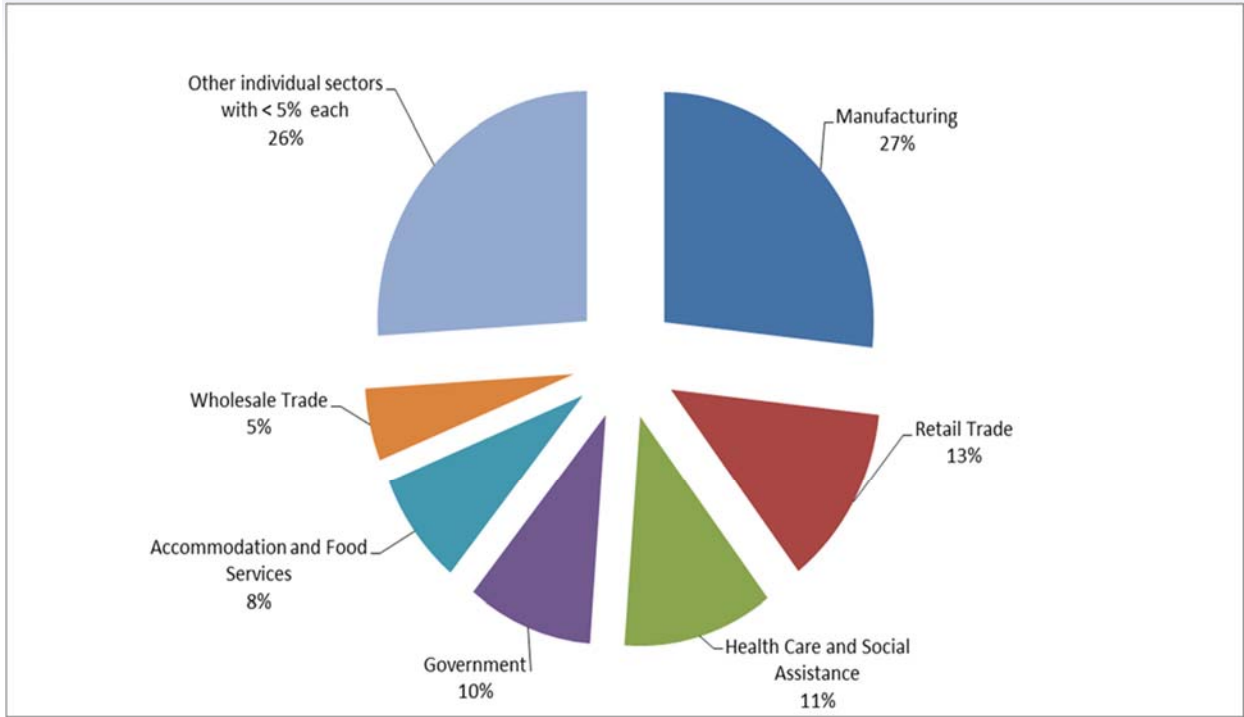


Source: EMSI (QCEW data only), as of 3rd Qtr. Self-employed and other employees not included to match Bureau of Labor Statistics data. **Please note that public educational facilities are classified under the Government category in EMSI.**

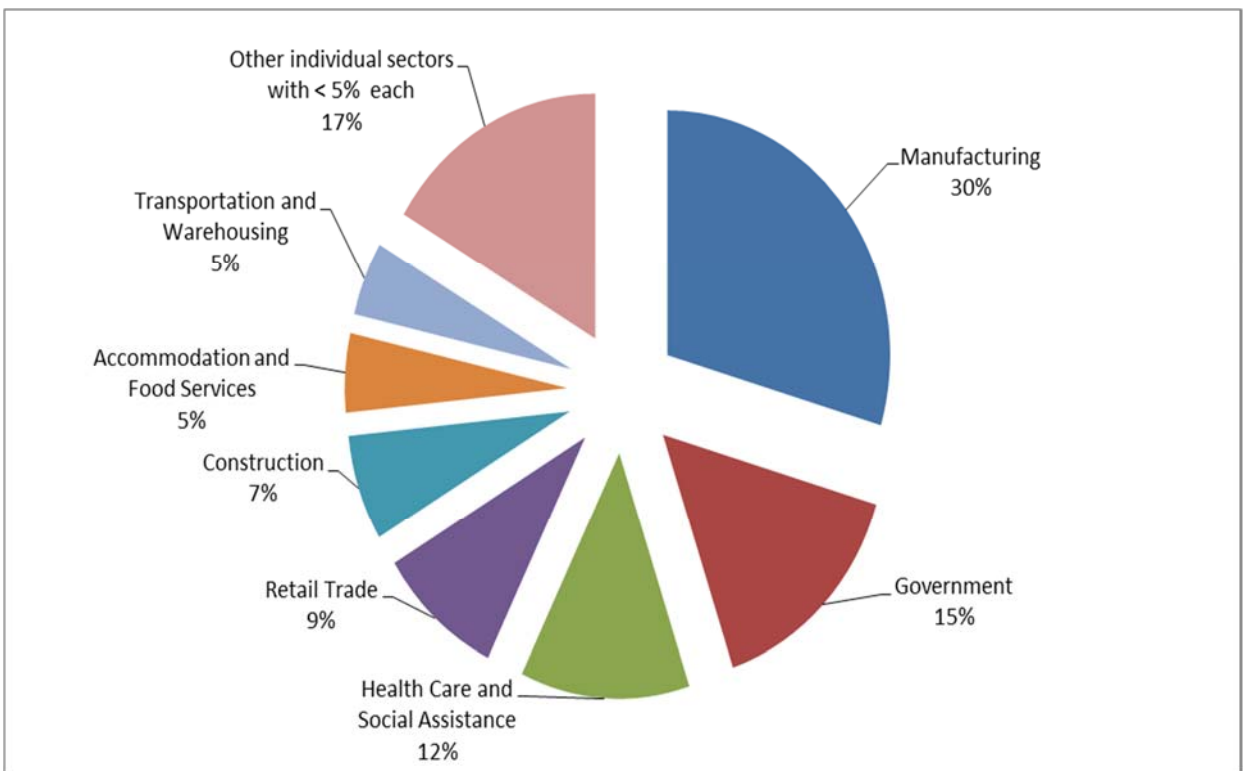
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2015 Employment by Industry-What sectors employ the most workers?

WASHINGTON COUNTY



DODGE COUNTY

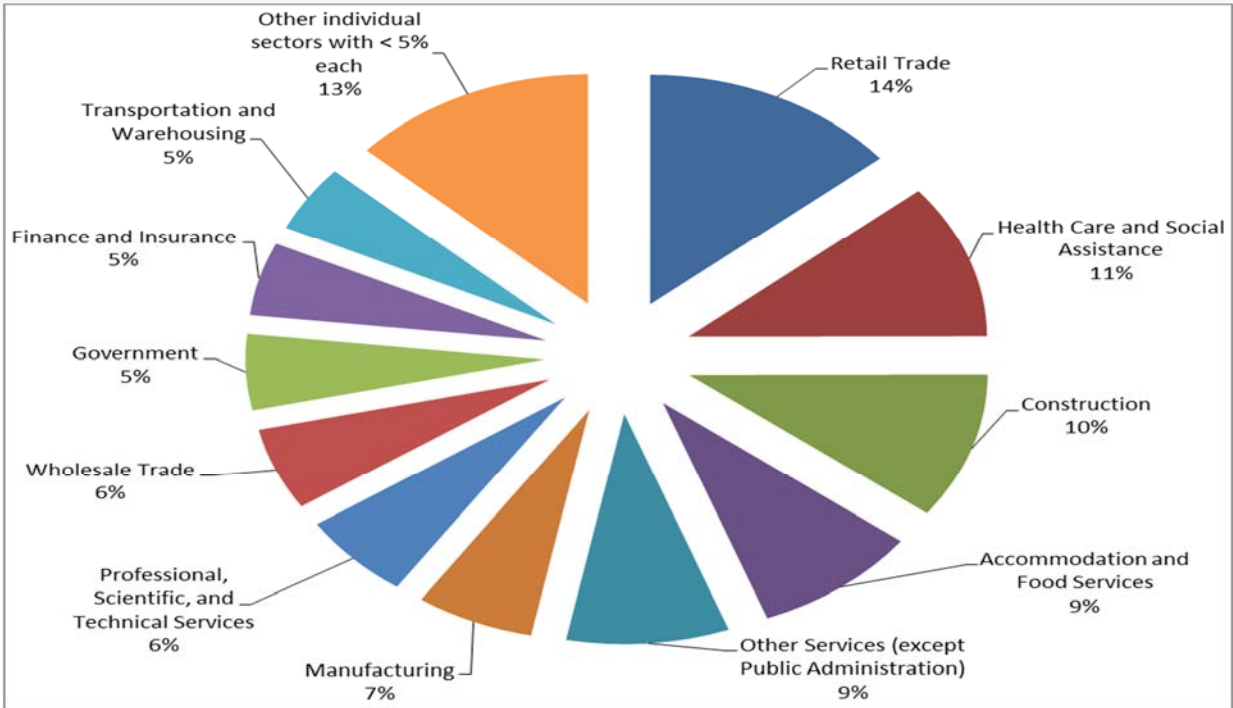


Source: EMSI (QCEW data), as of 3rd Qtr

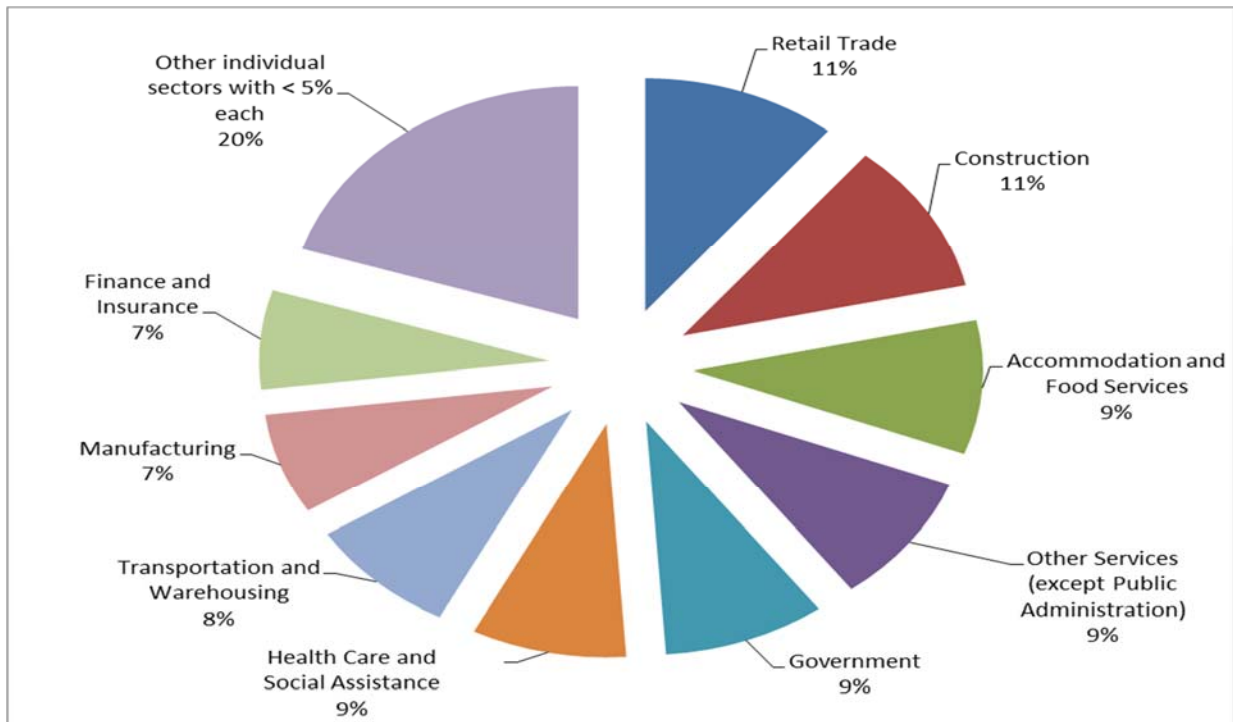
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2014 Total Number of Business Establishments

FOND DU LAC COUNTY



GREEN LAKE COUNTY

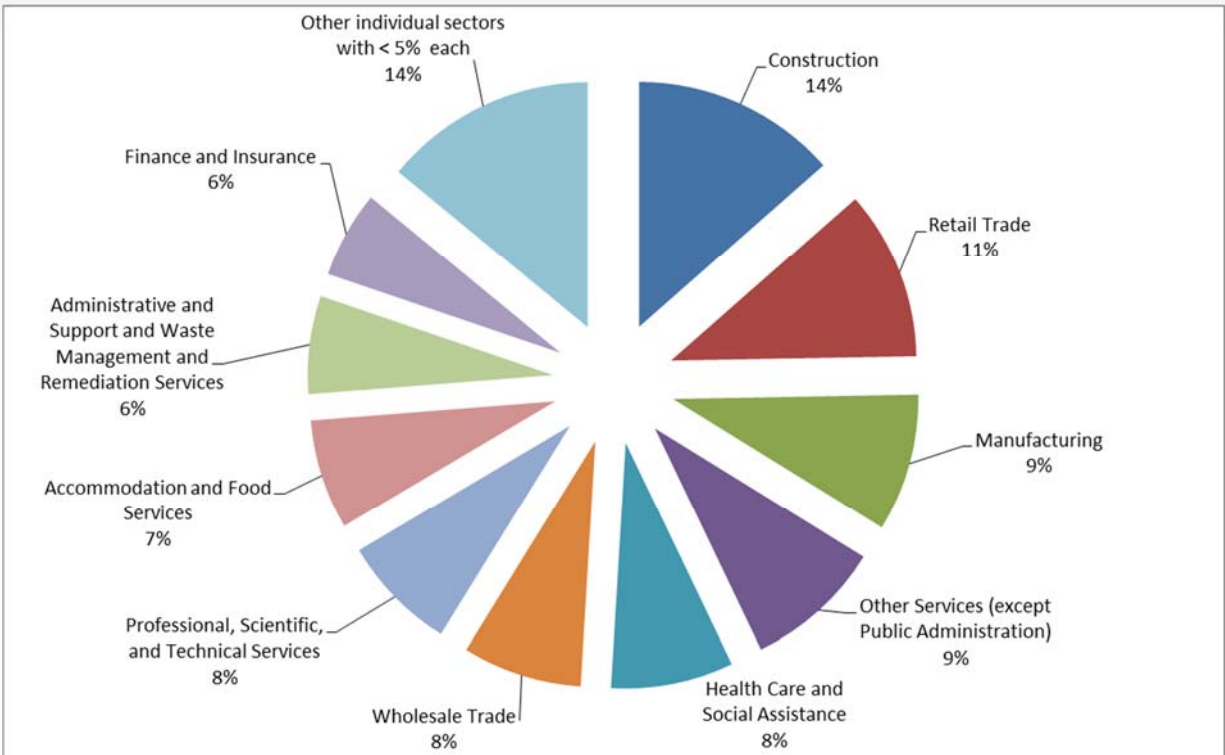


Source: EMSI (QCEW data), as of 3rd Qtr

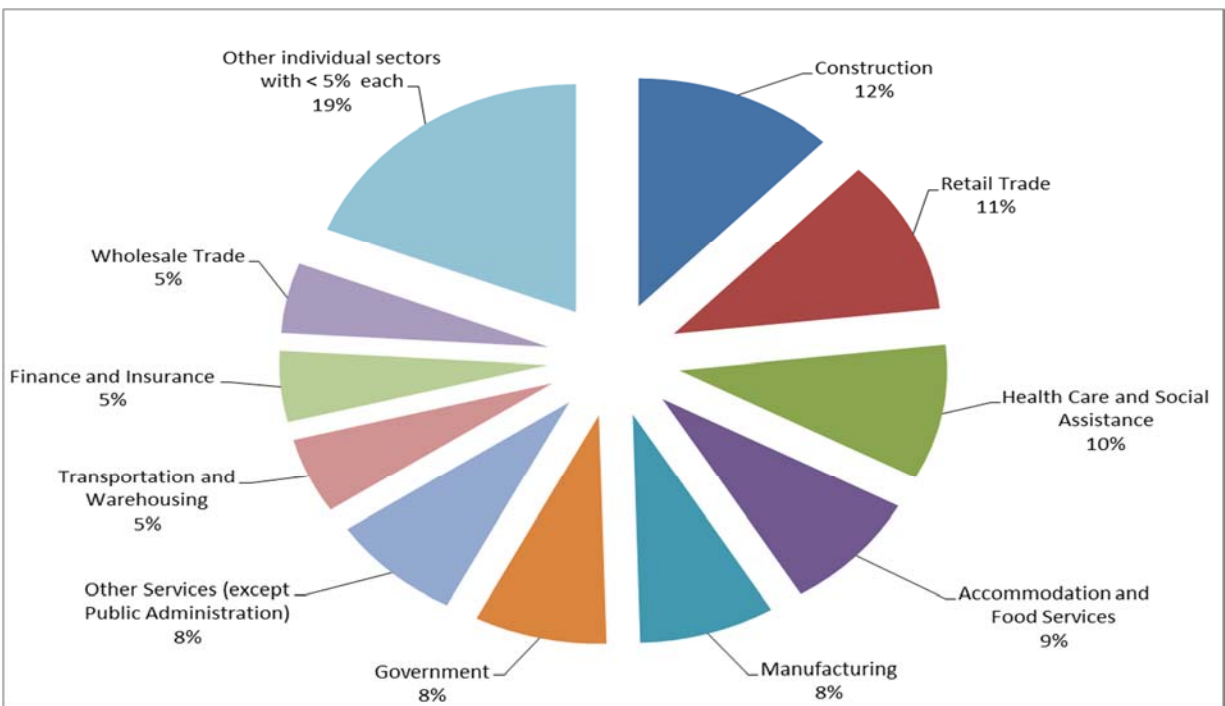
WORKFORCE

2014 Total Number of Business Establishments

WASHINGTON COUNTY



DODGE COUNTY



Source: EMSI (QCEW data), as of 3rd Qtr

WORKFORCE

2015 EMPLOYMENT BY INDUSTRY & BUSINESS ESTABLISHMENTS

WHAT DOES IT MEAN?

Employment by Industry indicates the dynamics of each sector in the local economy and in which sectors employ the most workers or jobs. Number of Business Establishments is similar to Employment by Industry but focuses on sectors where the most businesses/companies are concentrated.

Certain industries may have a lower concentration of businesses/firms, however they are key sectors employing a high number of workers. For example, the number of manufacturing firms run between 7%-9% of all business establishments within each county, but employ 19%- 30% of the workforce within a given county (QCEW workers covered by unemployment insurance). In the previous Economic Overview sections, we learned that certain manufacturing and health care sectors and associated jobs will be some of the fastest growing segments into 2020. This is good news since these sectors rank within the top three for concentration of workforce. If employment concentrations are in declining sectors, the wealth of the community and residents could be diminished.

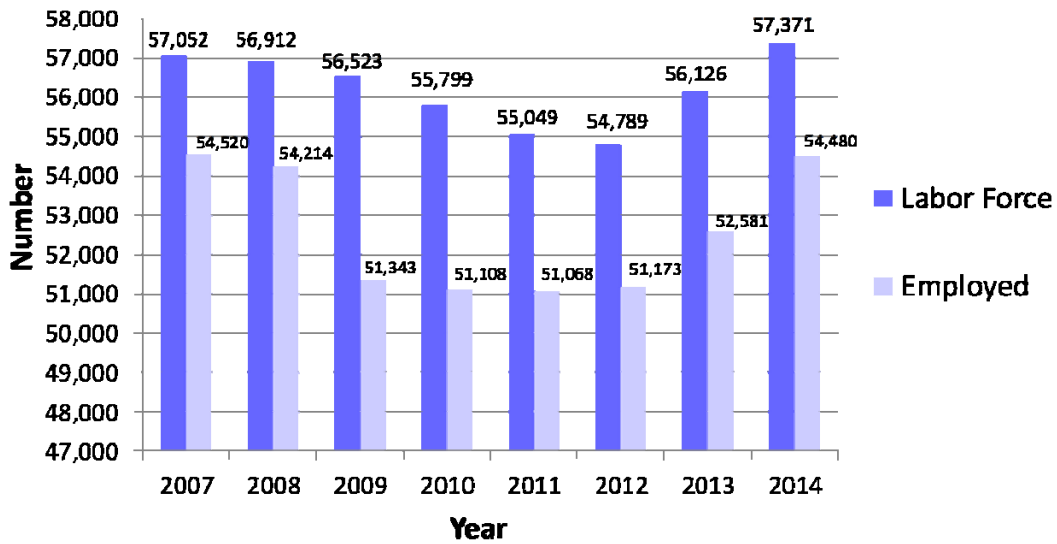
MPTC IMPACT

Knowing industry and business concentrations plus job growth projections can put Moraine Park in a proactive position when developing new program and training opportunities. It is important to evaluate labor market trends and industry developments. Within each county, the College can better understand the mix of strong sectors present; sectors that could employ graduates, partner with the College for customize training, and provide fundraising dollars for the Foundation. Also, analyzing the staffing patterns of the key sectors can shed light on the skill sets needed now and in the future to craft appropriate training options.

WORKFORCE

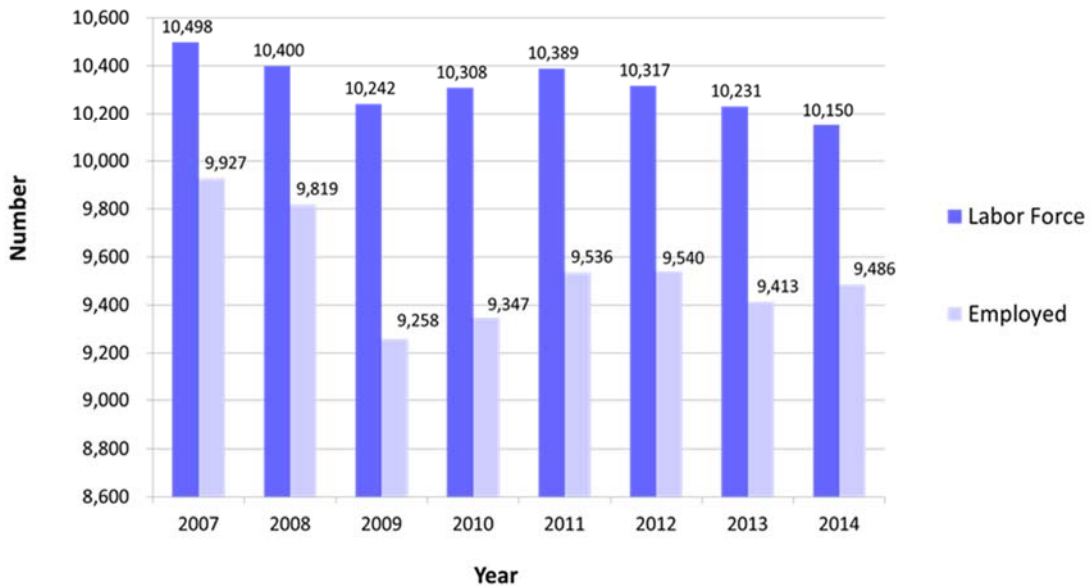
Annual Available Labor Force

FOND DU LAC COUNTY



GREEN LAKE COUNTY

Source: WI Dept. of Workforce Development.
Labor Market Information Query

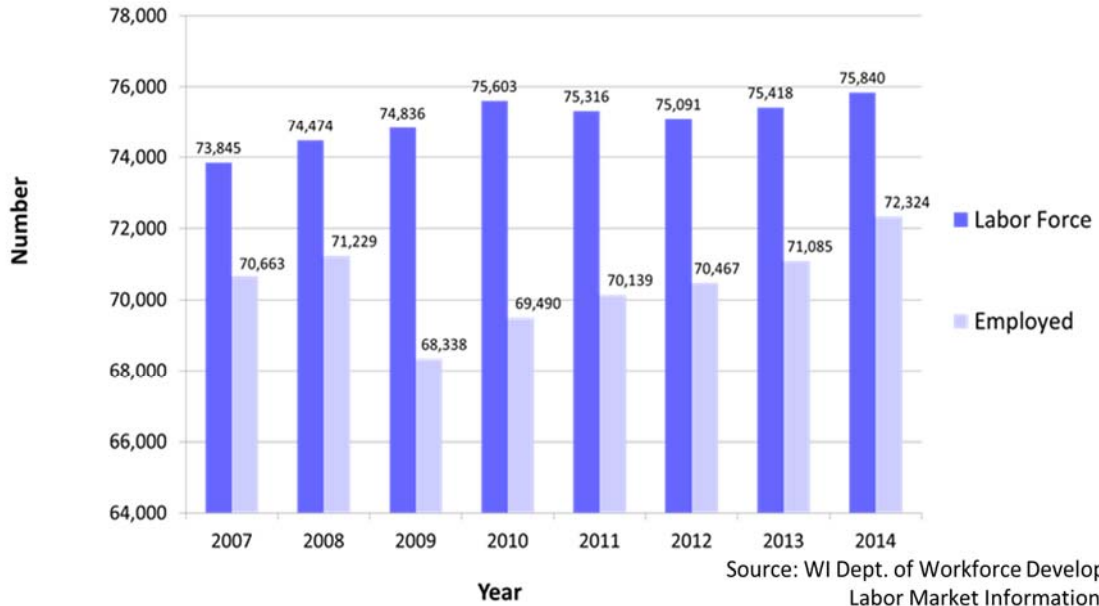


Annual Labor Force is derived from the Local Area Unemployment Statistics (LAUS) program. Labor force consists of people who are employed and unemployed (available workers for businesses to hire). To find unemployment rates, see page 18.

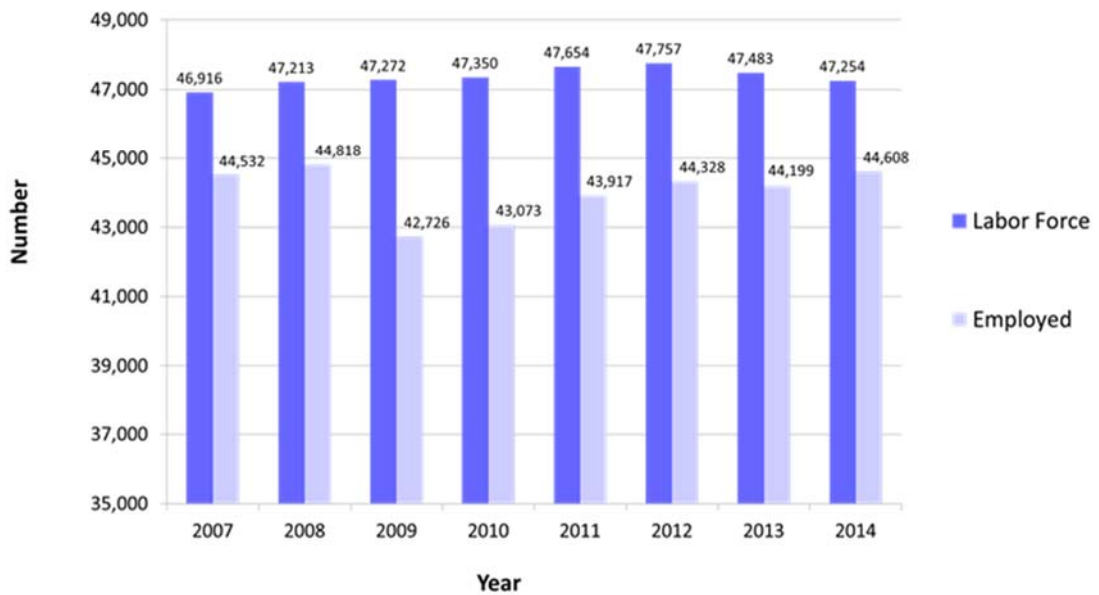
WORKFORCE

Annual Available Labor Force

WASHINGTON COUNTY



DODGE COUNTY



WHAT DOES IT MEAN?

Annual Labor Force is derived from the Local Area Unemployment Statistics (LAUS) program. Labor force consists of people who are employed and unemployed. In other words, it shows the workers available for businesses to hire. However, this does not show whether the available workers have the right skill sets employers need.

For three of the MPTC district counties, the number of those employed and in the labor force in 2014 has returned to pre-recession levels or higher. Green Lake County is still lagging, as was indicated with EMSI job counts on page 3. Those unemployed have steadily declined since 2009 (the difference between the labor force number and employed). See page 22 for unemployment charts. This is good news for both employers, employees, and graduates.

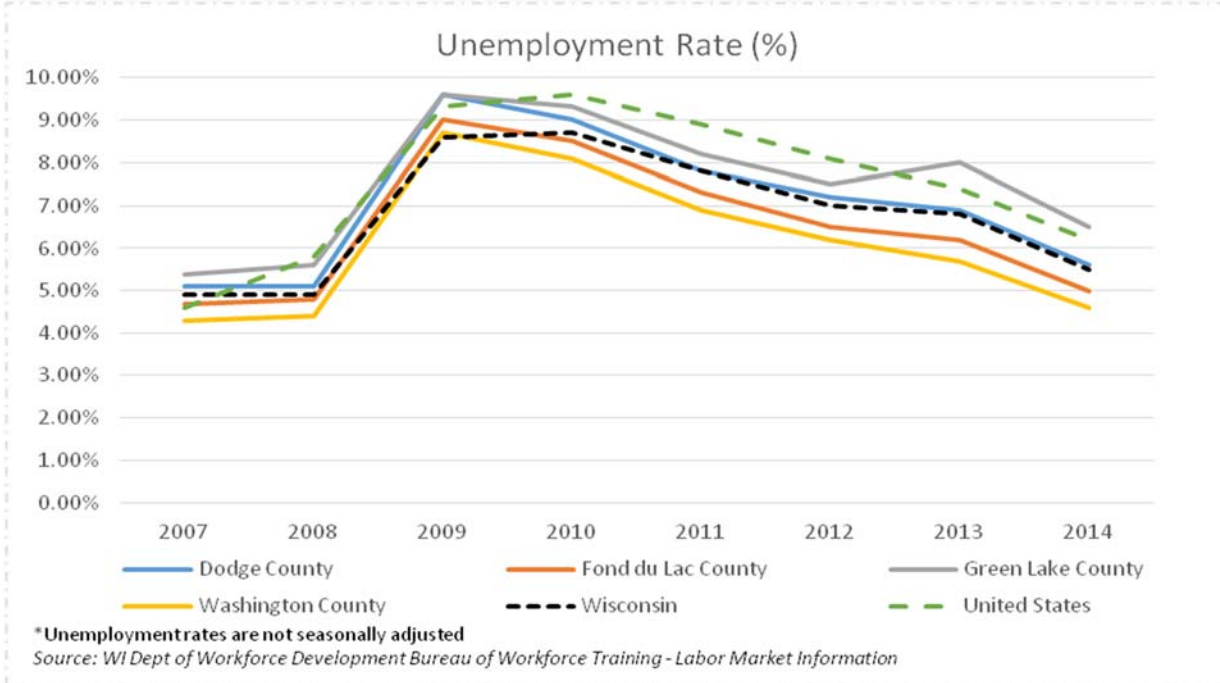
MPTC IMPACT

The more people who are working means more spending and savings in the local economy. However, this can translate to lower program enrollments for technical colleges. As the economy improves with more people working vs. unemployed, fewer non-traditional aged residents go back to school. This trend will likely to continue, however, as job growth slows down, these labor force figures could change direction. One question MPTC can ponder and have an impact on is: Will those remaining in the labor force (whether working or unemployed) have the right skill sets needed for the changing economy and workplace in the next five years?

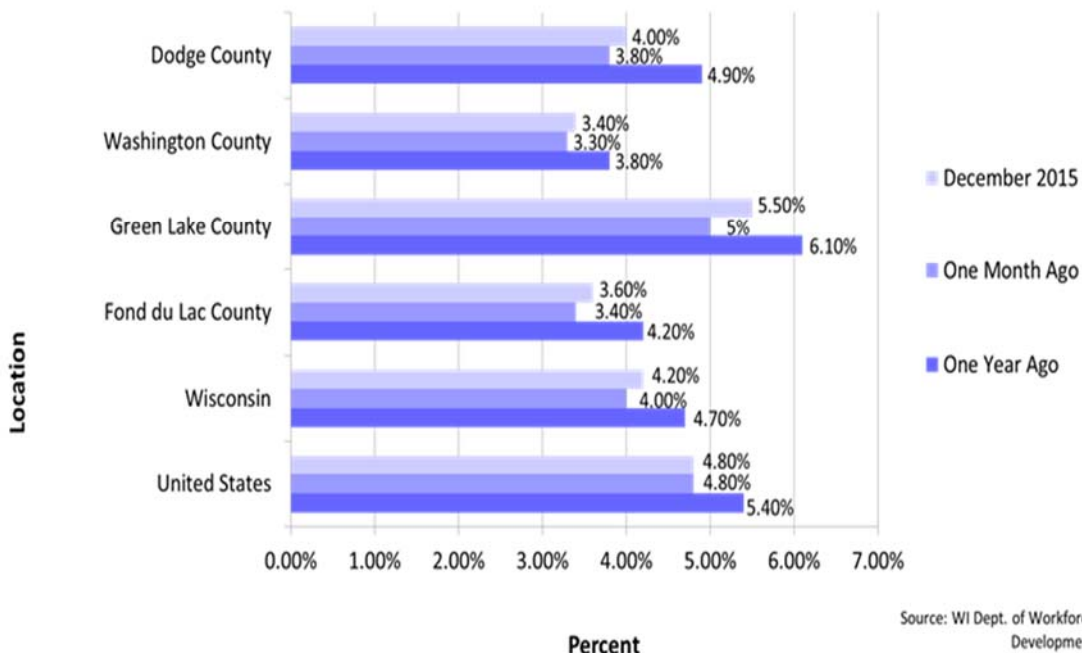
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Unemployment Rates (not seasonally adjusted*)

2007-2014 TREND LINE



DECEMBER 2015 RATES



*Seasonal adjustment is a statistical technique that attempts to measure and remove the influences of predictable seasonal patterns in hiring. Annual average and county estimates are not seasonally adjusted in these charts for consistent comparison.

WHAT DOES IT MEAN?

The unemployment rate is the percentage of the workforce without jobs. There will always be some unemployment due to seasonal factors, workers between jobs, recent graduates looking for work, and others. Comparisons with the state and national unemployment rate provide information about how well the region provides jobs for its workforce. A lower unemployment rate suggests optimal levels of production due to efficient use of equipment and resources. It also implies higher consumer buying power because people are working and are earning money that can be spent.

Fortunately, three of the MPTC district counties have had lower unemployment rates than the U.S. rate and Wisconsin, or mirrored Wisconsin. Since 2013, Green Lake County has had a higher unemployment rate than the state and United States.

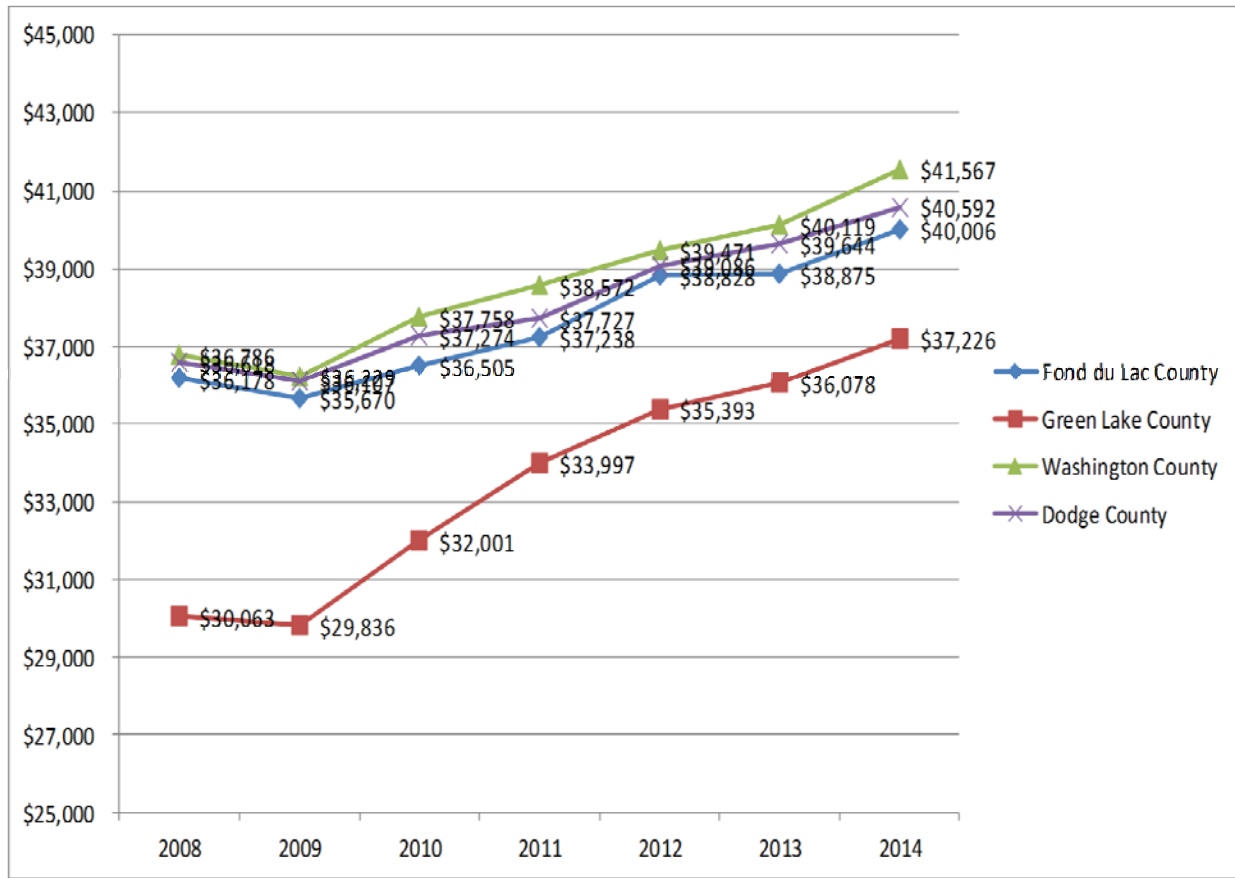
MPTC IMPACT

As indicated under the Annual Labor Force section, when unemployment rates are low, college enrollments tend to slow compared to an economy with higher unemployment rates. A focus could include gaining a deeper understanding of the skill sets of those employed, unemployed and under-employed. EMSI staffing reports is one analysis that could be completed, as indicated on page 13. Continue and enhance discussions with employers on skills needed now and in the near future to stay ahead of the curve, filling the pipeline of trained workers. How can the College help residents with low-skills increase those skills economically?

WORKFORCE

Average Annual Wage Private & Public, All Industries

2014 Average Annual Wage for Wisconsin = \$43,856



Average Annual Wage is derived from the QCEW program. Wages are paid to covered workers (by unemployment insurance) for services performed. Wage figures include bonuses, cash value of meals, lodging, tips, gratuities. Includes both taxable and nontaxable wages.

WHAT DOES IT MEAN?

Average Annual Wage is derived from the QCEW program. Annual wage is the gross pay by an employer to an employee over the course of one year for services performed (for an employee who is covered by unemployment insurance). Wage figures include bonuses, cash value of meals, lodging, tips, gratuities. It also includes both taxable and nontaxable wages.

The data for each county averages all industries, both public and private. Wages have been steadily increasing since the low point in 2009. This is good news for workers in order to keep pace with inflation.

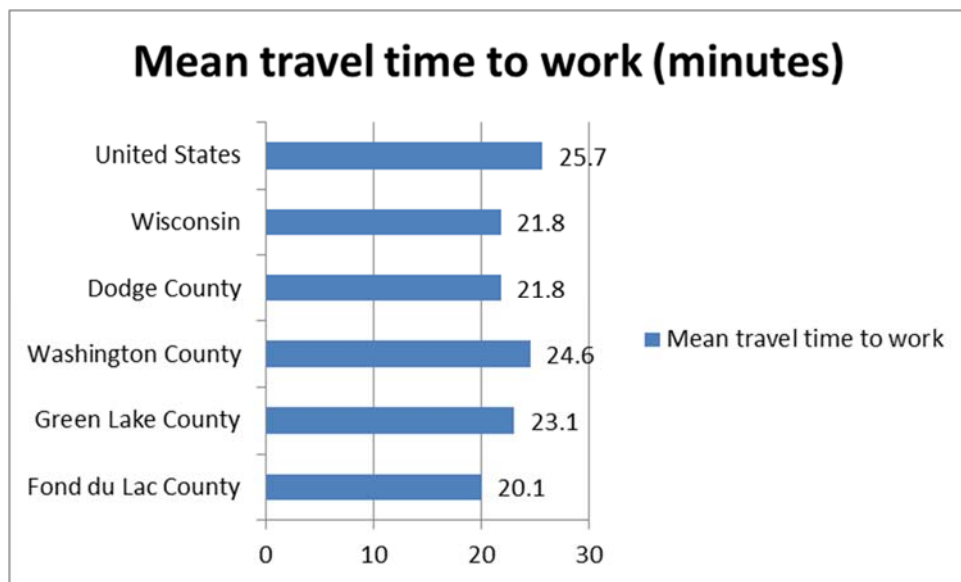
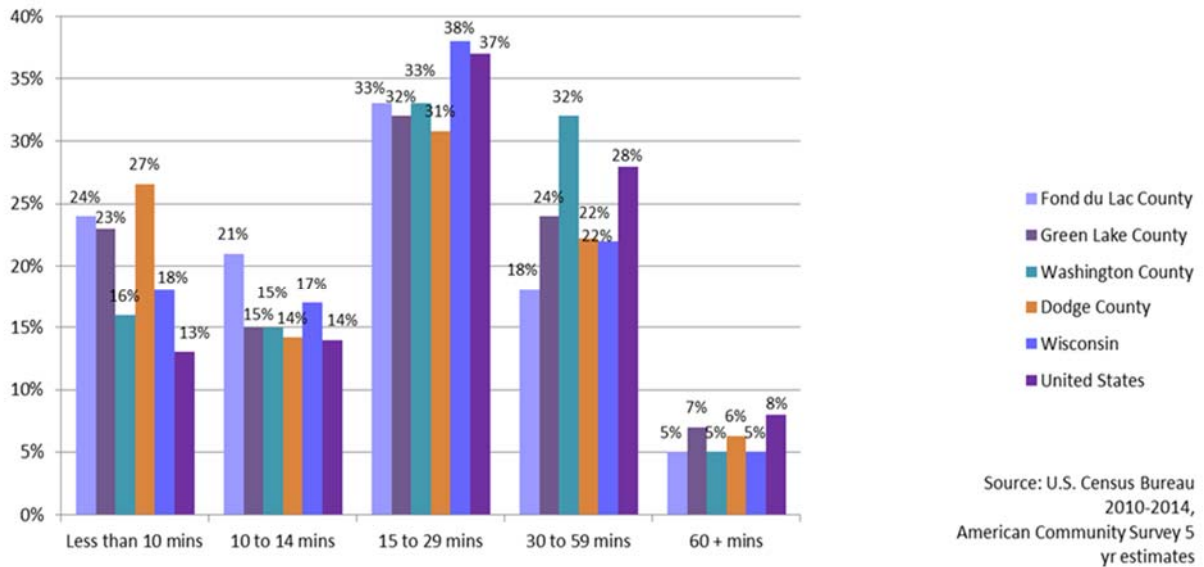
In 2014, all of the MPTC district counties were below the average annual wage of \$43,856 for Wisconsin. The Wisconsin average wage is probably pulled up somewhat due to higher wages in the larger metro areas of Madison, Milwaukee, Green Bay, etc. Since 2008, Washington County has trended with the highest wage among the four counties with Green Lake at the lowest average annual wage.

MPTC IMPACT

Employment and wage data have broad economic significance in evaluating labor market trends. If Moraine Park graduates obtain jobs in the four counties (Fond du Lac, Washington, Dodge or Green Lake), their average annual salaries will probably be lower than in Dane County or others with higher or more competitive wage structures. This could impact whether graduates stay local in the district, raise families, and volunteer in our local communities. Perhaps they will live locally but have to travel outside their community to obtain the job providing the salary they are seeking (see commuting patterns on the next few pages). Attracting talent to the College might be a challenge too if MPTC wages are lower than other more competitive locations in the state.

WORKFORCE

Work Commuting Patterns

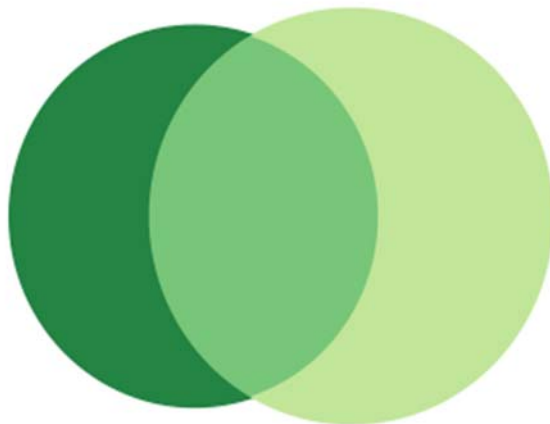


WORKFORCE

Inflow/Outflow of Workers

FOND DU LAC COUNTY

Inflow/Outflow Job Counts in 2013



19,109	- Employed in Selection Area, Live Outside
27,008	- Live in Selection Area, Employed Outside
23,507	- Employed and Live in Selection Area

53% (27,008) of the Workers LIVING in Fond du Lac County, WORK OUTSIDE the County (outflow).

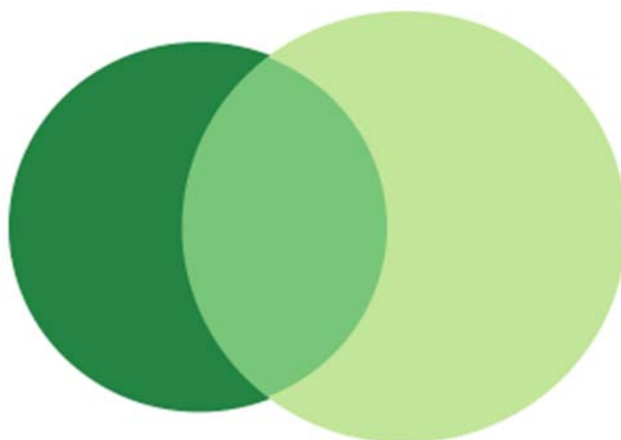
47% (23,507) of the Workers LIVING in Fond du Lac County, also WORK IN the County.

How to read the charts:

More Fond du Lac County workers LIVE inside the County but WORK outside the County (27,008) than those who both LIVE and WORK in Fond du Lac County (23,507) or those who commute to WORK inside the County from somewhere else (19,109).

GREEN LAKE COUNTY

Inflow/Outflow Job Counts in 2013



3,231	- Employed in Selection Area, Live Outside
5,357	- Live in Selection Area, Employed Outside
2,619	- Employed and Live in Selection Area

67% (5,357) of the Workers LIVING in Green Lake County, WORK OUTSIDE the County (outflow).

33% (2,619) of the Workers LIVING in Green Lake County, also WORK IN the County.

Source: U.S. Census Bureau, OnTheMap, 2013 Primary Jobs*

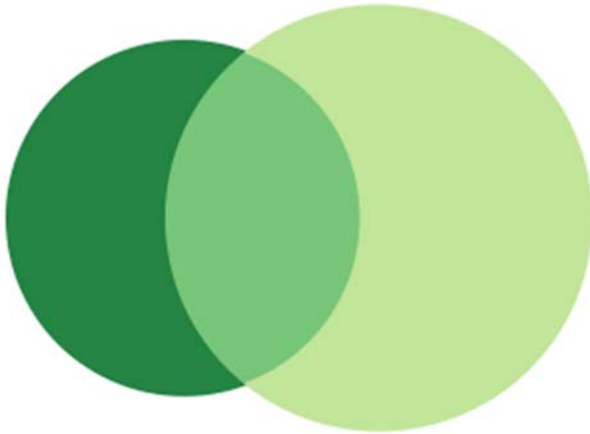
*Primary jobs include both public and private jobs. The primary job is the highest paying job for an individual worker.

WORKFORCE

Daily Movement

WASHINGTON COUNTY

Inflow/Outflow Job Counts in 2013



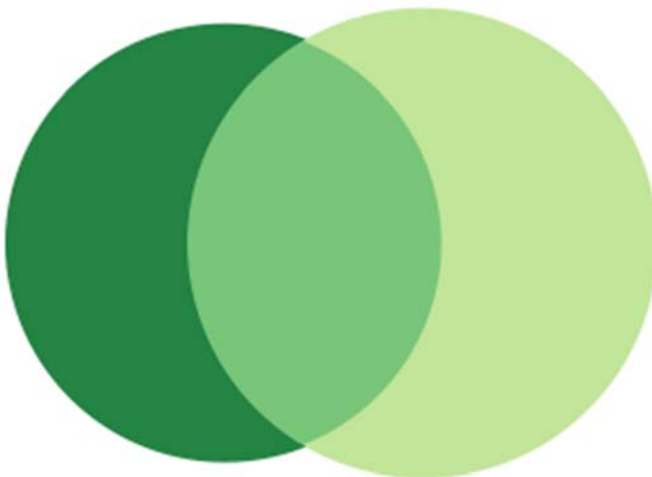
67% (46,170) of the Workers LIVING in Washington County, WORK OUTSIDE the County (outflow).

33% (23,046) of the Workers LIVING in Washington County, also WORK IN the County.

- 25,109 - Employed in Selection Area, Live Outside
- 46,170 - Live in Selection Area, Employed Outside
- 23,046 - Employed and Live in Selection Area

DODGE COUNTY

Inflow/Outflow Job Counts in 2013



58% (21,750) of the Workers LIVING in Dodge County, WORK OUTSIDE the County (outflow).

42% (15,593) of the Workers LIVING in Dodge County, also WORK IN the County.

- 16,950 - Employed in Selection Area, Live Outside
- 21,750 - Live in Selection Area, Employed Outside
- 15,593 - Employed and Live in Selection Area

WHAT DOES IT MEAN?

Commuting patterns and the inflow/outflow of workers show how mobile a workforce is in a community or county. In other words, how far do people living in a given area travel to work?

Locally, the highest percentage of workers travel between 15-29 minutes to work. It appears that people who live in Washington County travel the furthest to work (24.6 mins average) in comparison to the other counties and to the state average (21.8). This county's mean (average) travel time to work mirrors closely to that of the U.S. average at 25.7.

In terms of the inflow and outflow of workers who live in a given county, both Green Lake and Washington Counties have the highest percentage (67%) of workers living in their respective counties commuting outside their County for employment. Both these counties have the highest mean travel time to work as well.

If a community or county has more workers outflowing, this means resident consumer spending may stay in that county but workforce talent is being lost to companies outside the county. People are commuting to jobs elsewhere that probably offer more competitive wages (see average annual wage on pg 25) Those commuting into the given county for work may spend some money at local restaurants and stores but take the majority of their consumer spending back to their home community.

MPTC IMPACT

This may impact Moraine Park's ability to find qualified employees from the local area, requiring HR to broaden searches for qualified candidates. Many of these candidates will more than likely have no problem commuting up to an hour since our society is so mobile. This commuting information may also shed light on where students may live and work upon graduation if they continue to reside locally.

DEMOGRAPHICS



2015 Estimated Population Figures

Washington County:	134,253
Fond du Lac County:	102,703
Dodge County:	88,985
Green Lake County:	18,959



Source: ESRI 2015, Demographic and Income Profile Estimates

Gender Proportions by County

	Male	Female	
	Fond du Lac	49.3%	50.7%
	Green Lake	50.3%	49.7%
	Washington	50.4%	49.6%
	Dodge	52.8%	47.2%
			

Source: ESRI 2015, Market Profile

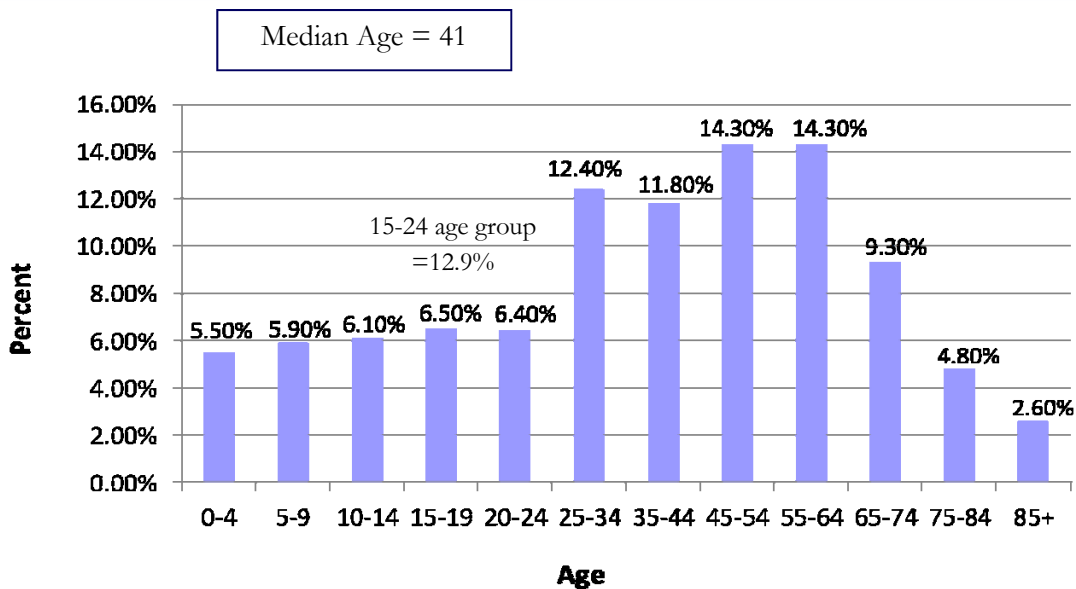
The information on this page shows overarching demographic statistics to frame the demographic breakouts on the following pages. Washington County has the largest population compared to the other MPTC district counties.

Genders are pretty equally split among all counties but with a slightly higher percentage of males in Dodge County. This could be skewed by the male prison population in Waupun and Fox Lake areas.

DEMOGRAPHICS

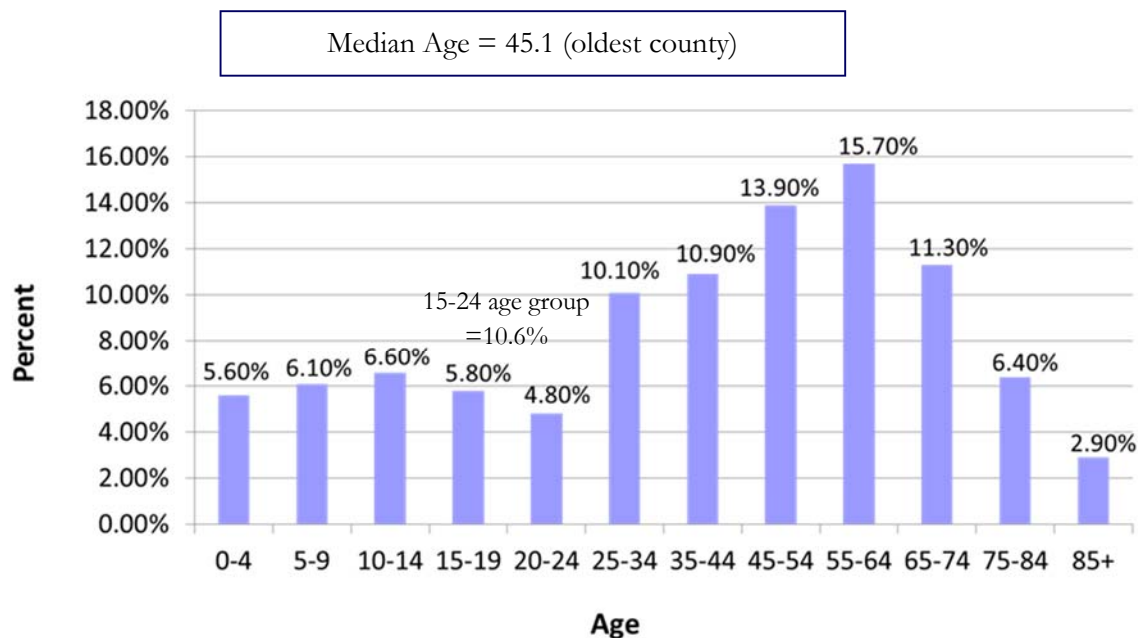
2015 Estimate Population by Age

FOND DU LAC COUNTY



GREEN LAKE COUNTY

Source: ESRI 2015, Demographic and Income Profile

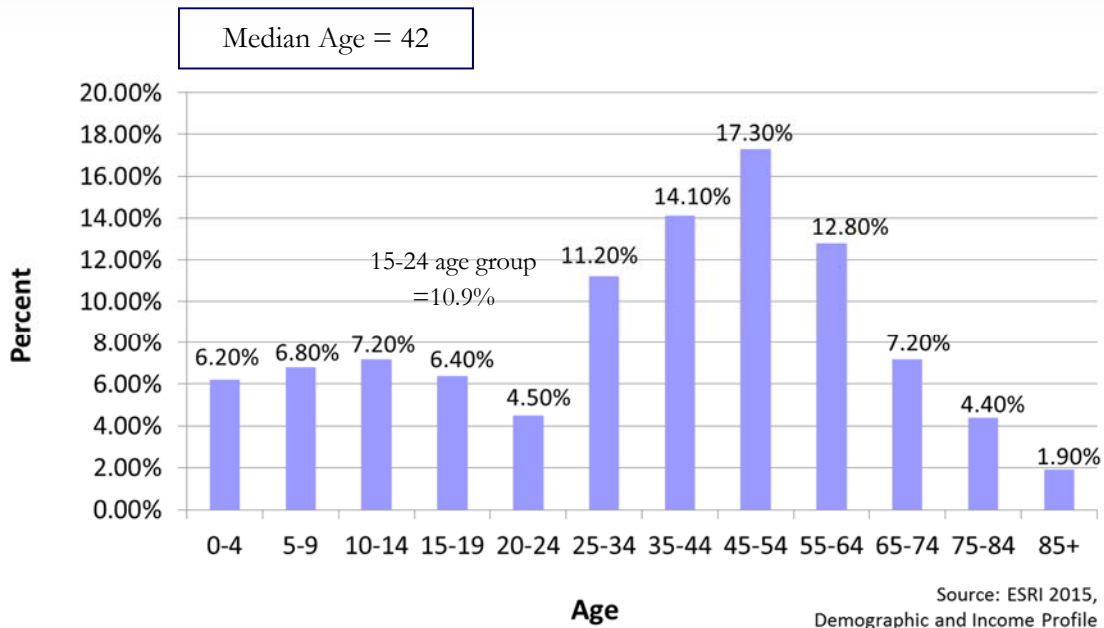


Source: ESRI 2015, Demographic and Income Profile

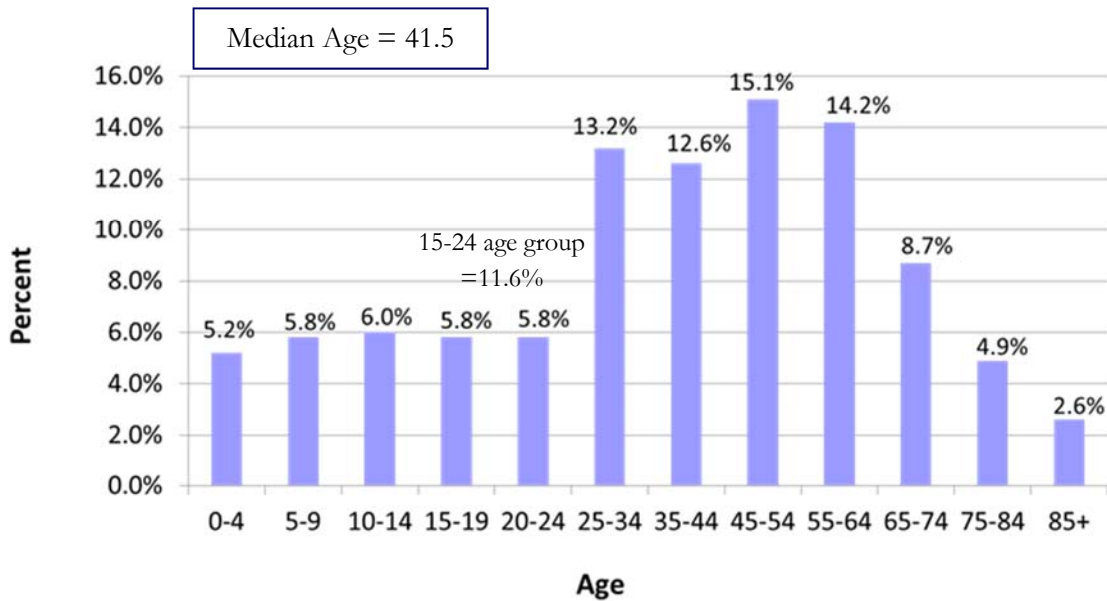
DEMOGRAPHICS

Population by Age

WASHINGTON COUNTY



DODGE COUNTY



DEMOGRAPHICS

AGE AND POPULATION DEMOGRAPHICS

WHAT DOES IT MEAN?

Population by age shows the proportionate number of people in successive age categories for the population. This age distribution can vary greatly due to changing fertility trends. It also shows the available working age population in relationship to the overall population. Typically, the working age population is considered to be 20 to 64 year olds.

Population by age is important because it influences the labor market and the health of the economy in general. A younger population produces working age individuals and families who drive the economy with their spending habits, whereas an aging population implies less wealth generation and more demand for services.

MPTC IMPACT

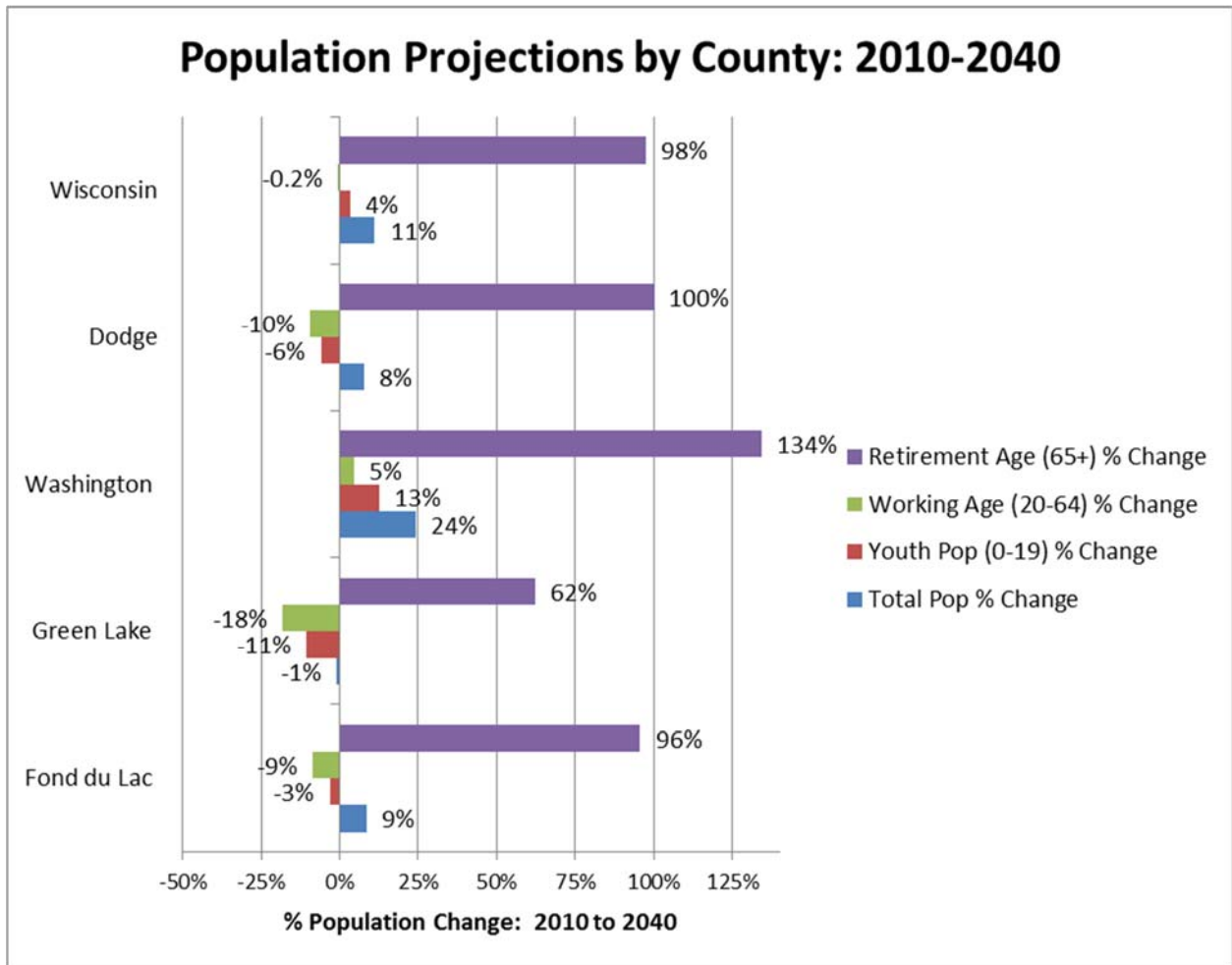
Individually, the MPTC district counties are “older” than the state overall and especially the United States. Green Lake has the oldest median age at 45.1 followed by Washington at 42 then Dodge at 41.5 and Fond du Lac at 41. Wisconsin’s 2015 estimated median age is 39.3 with the U.S. at 37.9. This “graying” of our residents and workforce may bring more skill shortages and need for specialized training. It may also bring a greater need for succession planning, flexible schedules and phased retirement to employees of Moraine Park and district employers.

On the other age spectrum, Fond du Lac County appears to have the highest percentage (12.9%) of current “traditional aged” potential students (15-24 age group) in comparison to other counties. However, Washington County has the highest percentage (20.2%) of the younger population (0-14 yrs old) that will be potential students in the future.

This data reflects current population estimates. What will be trending? The next few pages shed light on eye opening population projections to 2040.

DEMOGRAPHICS

Population Projections 2010-2040



Source: Wisconsin Taxpayers Alliance

DEMOGRAPHICS

POPULATION PROJECTIONS

WHAT DOES IT MEAN?

According to the Wisconsin Taxpayers Alliance estimates, only Washington County will see growth in all age categories from 2010-2040. This county will have the highest growth in retirement age population as well. Fortunately, Washington County probably won't be impacted as much by the huge bubble of retiring workers as the other counties that have negative growth rates in the working age and youth populations.

MPTC IMPACT

As indicated in the previous current population section, as the age group 65+ retires taking their knowledge and skills with them, skill shortages will probably have an even greater impact on businesses in the next 24 years due to the huge percentage retiring. We lack the number of younger people to replace these retirees. Will companies downsize and become even more lean, agile and automated? What will the workplace look like and what skills will be needed due to this shift in population? Keeping a proactive stance on employment and population statistics will be very important plus keeping local employers proactively engaged in programming will be vital.

What can Moraine Park do for all those retirees? More enrichment classes? Tailored entrepreneurship classes? Many retirees want to use their expertise and talents by starting new businesses, especially consulting firms.

DEMOGRAPHICS

Consumer Spending

AVERAGE HOUSEHOLD SPENDING PER YEAR ON EDUCATION

	Average Amount Spent	Spending Potential Index (Nat'l Avg = 100)
Fond du Lac County	\$1,238.36	81
Green Lake County	\$1,007.79	66
Washington County	\$1,740.73	114
Dodge County	\$1,193.31	78
Wisconsin	\$1,349.73	89

Source: ESRI 2015

WHAT DOES IT MEAN?

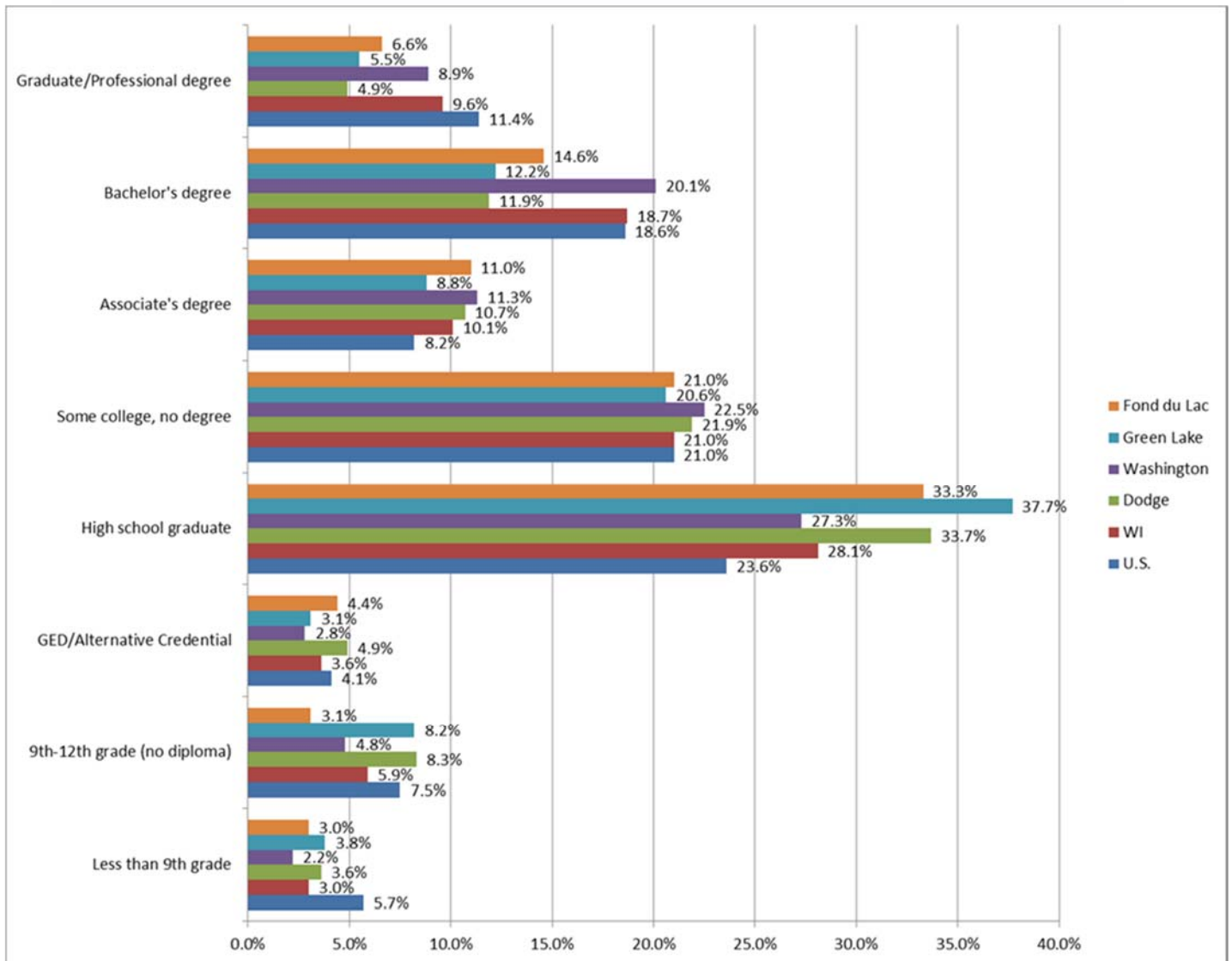
Consumer spending data is derived from the 2011 and 2012 Consumer Expenditure Surveys from the Bureau of Labor Statistics. The Spending Potential Index is household-based and represents the amount spent for a product or service relative to a national average of 100. Education consumer spending includes costs associated with college tuition including technical colleges, school books and supplies from elementary to college, test preparations, and tutoring. The expenses are spread over all households in a geographical area. Some households don't have any expenses while others have high expenses if paying for college.

MPTC IMPACT

In the four county comparison, Washington County households tend to spend more than the national average for education (14% more). This appears to correlate to the educational attainment on the next page. Green Lake, on the other hand, spends the least at 34% less than the national average. Perhaps marketing dollars and recruitment efforts could be adjusted to spend slightly more in the Washington County area due to their consumer spending.

EDUCATION

Educational Attainment (% of population 25 and older)
(highest degree completed by an individual)



Source: ESRI 2015

EDUCATION

EDUCATION ATTAINMENT

WHAT DOES IT MEAN?

Educational attainment levels, for the percentage of the population twenty-five and older, refers to the highest degree of education an individual has completed. Educational attainment is not a measure of the quality of education received by a student during these years nor the student's proficiency level.

Higher levels of educational attainment are associated with a range of positive outcomes, including better income, employment and health. A population's educational levels are positively related to economic growth rates. As the requirements for many jobs and the expectations of employers are rising, education that provides the necessary skills and knowledge has become essential for full participation in society and for a productive workforce.

MPTC IMPACT

In the four county comparison, Washington County residents appear to be the most educated with the highest number with BA, graduate/professional, and associates degrees. As a percentage, Washington County has more of its population age 25+ with a BA degree (20.1%) than the state and U.S. population. This correlates to this county spending more than the national average for education at all levels (14% more). High school students and non-traditional aged residents in this county will continue to be prime targets for future enrollments.

Green Lake has the highest percentage stopping at a high school degree (37.7%). As seen on the consumer spending page, Green Lake also spends a considerable amount less (34% less) than the national average on education. This makes sense as Green Lake is the oldest county in terms of median age compared to the other counties. Does it make sense to increase exposure in Green Lake County high schools and the community? Communicate the value of education and why Moraine Park is a good fit, no matter what your age?

Source Methodology

EMSI Data

Industry Data:

EMSI industry data have various sources depending on the class of worker. (1) For QCEW Employees, EMSI primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns and Current Employment Statistics. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

State and Local Data Sources:

For industry and occupation reports, EMSI uses state data from the following agencies: Wisconsin Department of Workforce Development, Bureau of Workforce Information.

For a more complete list of EMSI sources, please see:

<http://kb.economicmodeling.com/whats-the-complete-list-of-sources-ems-i-uses-2/>

LAUS Workforce Data

Local Area Unemployment Statistics (LAUS) program. Labor force consists of people who are employed and unemployed (available workers for businesses to hire). These are monthly estimates using models with inputs from the Decennial Census, Current Population Survey, Current Employment Statistics, QCEW, and Unemployment Insurance programs. The model uses a monthly real-time benchmarking procedure.

ESRI Demographic Data

U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.