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WABASH COUNTY POPULATION ANALYSIS AND RECOMMENDATIONS: QUANTITATIVE AND QUALITATIVE DATA ABOUT DEMOGRAPHIC, SOCIOECONOMIC, AND INDUSTRY TRENDS

July 2019

Prepared by the Purdue University Fort Wayne Community Research Institute and written by Rachel Blakeman, Mark Becker and John Stafford with qualitative information from Amanda Lopez for the Community Foundation of Wabash County in cooperation with Grow Wabash County with funding from a Lilly Endowment GIFT initiative phase VII grant.

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EXECUTIVE SUMMARY

Wabash County has steadily lost population for nearly 40 years and is projected to have fewer residents in 2050 than 2019. Low birthrates coupled with more people moving out than moving in creates a perfect storm for population decline that is not easily reversed.

This is a problem, but it can feel invisible in Wabash County. Personal income continues to increase, and the number of households are staying steady. Even property tax revenue is growing. However school enrollments are projected to decline and accordingly their financial support from the state. The consumer base for restaurants, retail outlets, and professional services like attorneys and banks will shrink. Furthermore, the job base that once kept counties like Wabash afloat – typically manufacturing – has declined without comparable-wage replacement jobs in other industries. This scenario is not unique to Wabash County. A national trend exists of population decline and economic change in rural locations not adjacent to urban metros. Similar things are happening in some of the counties surrounding Wabash County.

Increasing population against these strong national demographic headwinds is a very ambitious goal. No guaranteed road map or best practice exists. However that doesn't mean nothing can be done. Rather, improving the local systems and structures from everything like local government finance to arts and entertainment provides an opportunity to not only make Wabash County an attractive place to work or visit, but also a great place to call home for those who just moved there and those who have lived there their entire lives.

Success doesn't happen overnight. This is work that will take years to show results. While some projects can provide quick wins to build and sustain momentum, it will be hard work over the long haul. Don't give up. Bold results require hard work and commitment from across Wabash County.

INTRODUCTION

The Community Research Institute (CRI) at Purdue University Fort Wayne prepared this report as part of a project for the Community Foundation of Wabash County and its partner, Grow Wabash County. The research was funded by the Community Foundation from a Lilly Endowment Inc. GIFT initiative phase VII grant.

CRI worked with Transform Consulting Group, Becker Consulting, and Make No Small Plans, LLC, to provide quantitative and qualitative data about Wabash County, Indiana, as it relates to the forces and dynamics around Wabash County's population decline. This information is designed to provide the Community Foundation and its community partners a common understanding of the past, present and future: what has happened locally, what is currently occurring, and where Wabash County could go.

The qualitative data supplements the numbers by providing valuable context as to the "why," coming from people who either currently live or once lived in Wabash County.

Lastly the report offers a series of recommendations to the Community Foundation, supported and informed by the quantitative and qualitative data.

METHODOLOGY

CRI's methodology for this project was to use existing quantitative data and work with local partners to provide qualitative data. Transform Consulting Group, John Stafford, and Mark Becker gathered the qualitative data. CRI compiled the quantitative data. CRI calculated percentages and change for some of the data to provide comparisons between Wabash County and the comparative geography. CRI's calculations are noted with the respective chart or table in the report. CRI also provides analysis in the report's narrative.

QUANTITATIVE SOURCES

CRI used the following sources for quantitative data:

- U.S. Bureau of Economic Analysis population and personal income for 1970 through 2017
- U.S. Census Bureau's annual Population Estimates for 2010 through 2018
- U.S. Census Bureau's 5-year American Community Survey estimates for 2012 and 2017¹

¹ The 2012 estimates cover data collected 2008, 2009, 2010, 2011, and 2012. The 2017 estimates cover 2013, 2014, 2015, 2016, and 2017. Each chart or table cites the Census Bureau table number.

- U.S. Census Bureau’s 1-year American Community Survey supplemental estimates in 2014-2017 for data used for labor force participation rates (Table K202301)
- Emsi’s 2019.2 data for 2001-2018
- U.S. Bureau of Labor Statistics Local Area Unemployment Statistics for 2000 through 2018
- U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages for 2001 through 2018 wages and industry employment
- U.S. Internal Revenue Service for Statistics of Income
- Indiana Department of Education’s Compass data portal website
- Northeast Indiana Regional Partnership’s Road to One Million plan for the ROTM population goals
- Indiana University Kelley School of Business Indiana Business Research Center for population projections for 2015 through 2050
- Wabash County Assessor’s Office for assessed values and property tax revenue
- Indiana Department of Workforce Development for commuting patterns

QUALITATIVE SOURCES

TCG conducted a series of focus groups and telephone interviews as well as an online survey from audiences with an affinity to Wabash County. The four focus groups were held in May 2019 for Millennials (those born between 1980 and 2000) and people who did not grow up in Wabash County but now live there, which for this report’s purposes are termed transplants. The online survey was designed for Millennials who graduated from a Wabash County high school but have since moved away. The phone interviews were conducted with people who work in Wabash County but live elsewhere. TCG’s full report is available in the appendix of this report.

The Community Foundation arranged the interview subjects for John Stafford and Mark Becker, whom they interviewed in person in Wabash County. These interviews were structured to talk to longtime residents or community leaders to better understand the historical perspective of what has occurred, especially as it relates to the local employer base and other significant events that may have contributed to population loss.

AUTHOR BIOGRAPHIES

Rachel Blakeman is the director of the Purdue University Fort Wayne Community Research Institute. CRI provides contract-based research and analysis for public- and private-sector and non-profit clients to help leaders make informed decisions. Her experience includes local government project management, regulatory compliance, communications, and legislative affairs with an emphasis on state legislation. Blakeman graduated from Ball State University and the Indiana University Robert H. McKinney School of Law. A Program on Law and State Government Fellow, her research in law school focused on state government’s role in economic development, specifically advanced manufacturing.

Amanda Lopez is president of Transform Consulting Group, a woman-owned, Indiana-based strategic and data-driven consulting firm focused on serving nonprofits, education, government, and communities. Founded in 2008, TCG has helped organizations across the nation with board development, evaluation, fundraising, procurement and contract management, program development, project management, research and analysis and

strategic planning along with ongoing counsel to organizations in order to accelerate impact. Lopez is a graduate of Purdue University and the University of Michigan with an MSW in Social Policy and Program Evaluation.

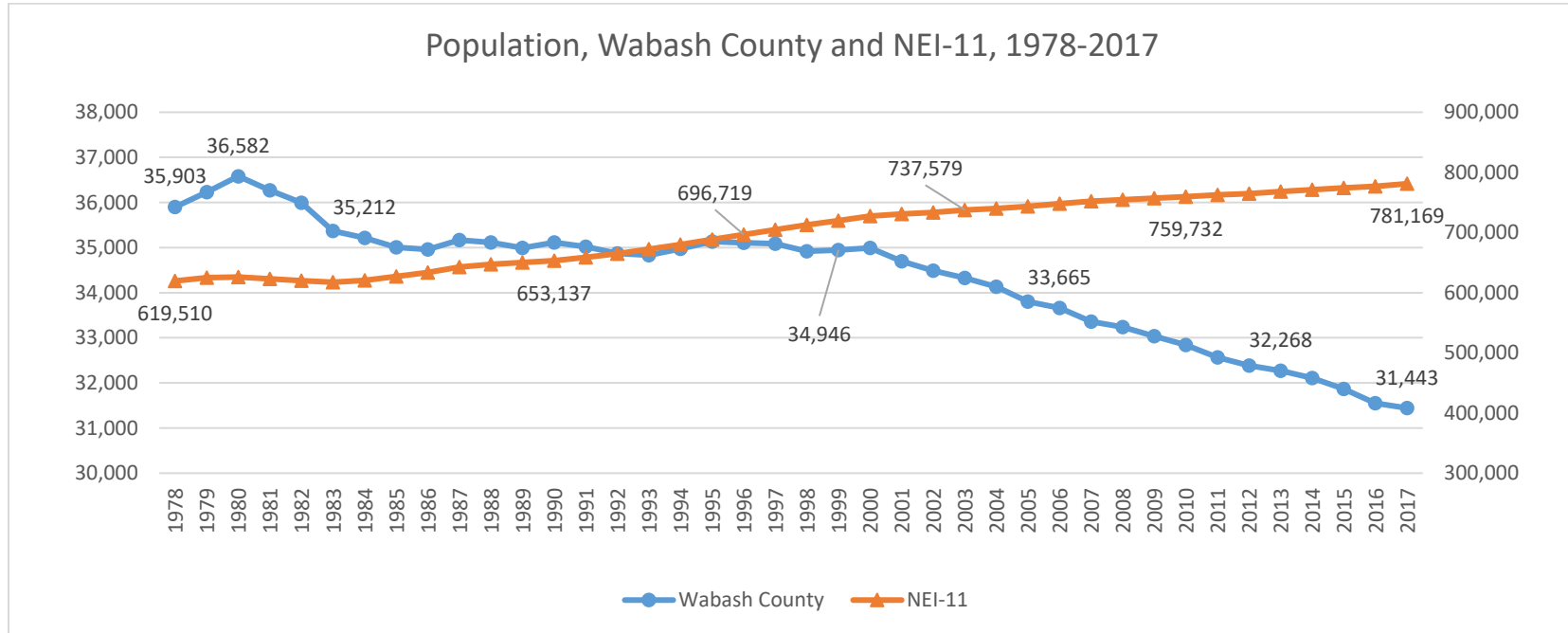
John Stafford is the owner of the financial consulting firm Make No Small Plans, LLC. Stafford is the retired CRI director, serving in that role for a decade. He is an urban planner by training and experience in local government at the city and county level. From 1988 to 2000, Stafford served as director of strategic planning for the City of Fort Wayne. Stafford is a graduate of Ball State University and the University of Illinois.

Mark Becker of BeckerConsulting is a consultant in community development and strategic planning for economic development and community development organizations. Becker was the founding president and CEO of Greater Fort Wayne Inc., which is the single point of contact for economic development in Allen County, Indiana. Before rejoining the private sector, he served Mayors Graham Richard and Tom Henry as Deputy Mayor. Becker also served as executive director to the Northeast Indiana Fund, supporting community development and capacity building efforts in the 11-county region of the Northeast Indiana Regional Partnership. Mark is an alumnus of the University of Cincinnati College of Design, Architecture, Art, and Planning.

POPULATION

Population is the number of people living within a geography. To provide the Community Foundation’s requested extended time series, CRI used the annual Wabash County population issued by the U.S. Bureau of Economic Analysis (BEA), which the BEA uses to calculate per capita personal income (PCPI).² CRI also calculated the total population for the 11-county northeast Indiana region³ (NEI-11) as a comparison.

CHART 1: POPULATION



Source: U.S. Bureau of Economic Analysis with NEI-11 calculated by CRI

Wabash County’s population peaked in 1980 at 36,582. The population remained steady from the early 1980s through 2000. Wabash County has experienced actual population decline year over year since 2000. In contrast, NEI-11’s population trended upward in this same time period, save for three years in the early 1980s, which were the only years with annual population loss.

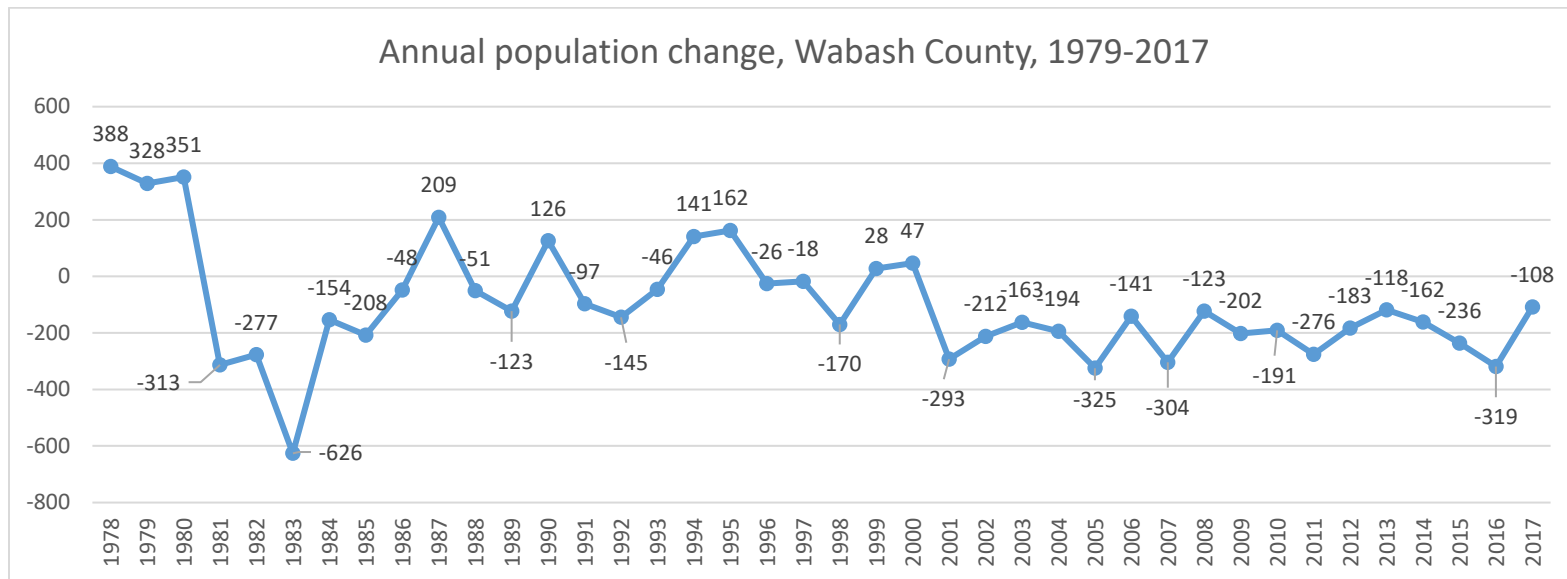
² BEA calculates PCPI by dividing the total income of all county residents by the full county population, with no cutoff by age. Unlike labor market calculations, PCPI calculations include children.

³ The 11-county region consists of Adams, Allen, DeKalb, Huntington, Kosciusko, LaGrange, Noble, Steuben, Wabash, Wells and Whitley counties.

POPULATION CHANGE

Chart 2 shows Wabash County’s year-over-year population change, using the BEA population for Wabash County. Since PCPI data isn’t released until November of the next year, the 2018 population was not available at the time of publication.

CHART 2: YEAR-OVER-YEAR POPULATION CHANGE



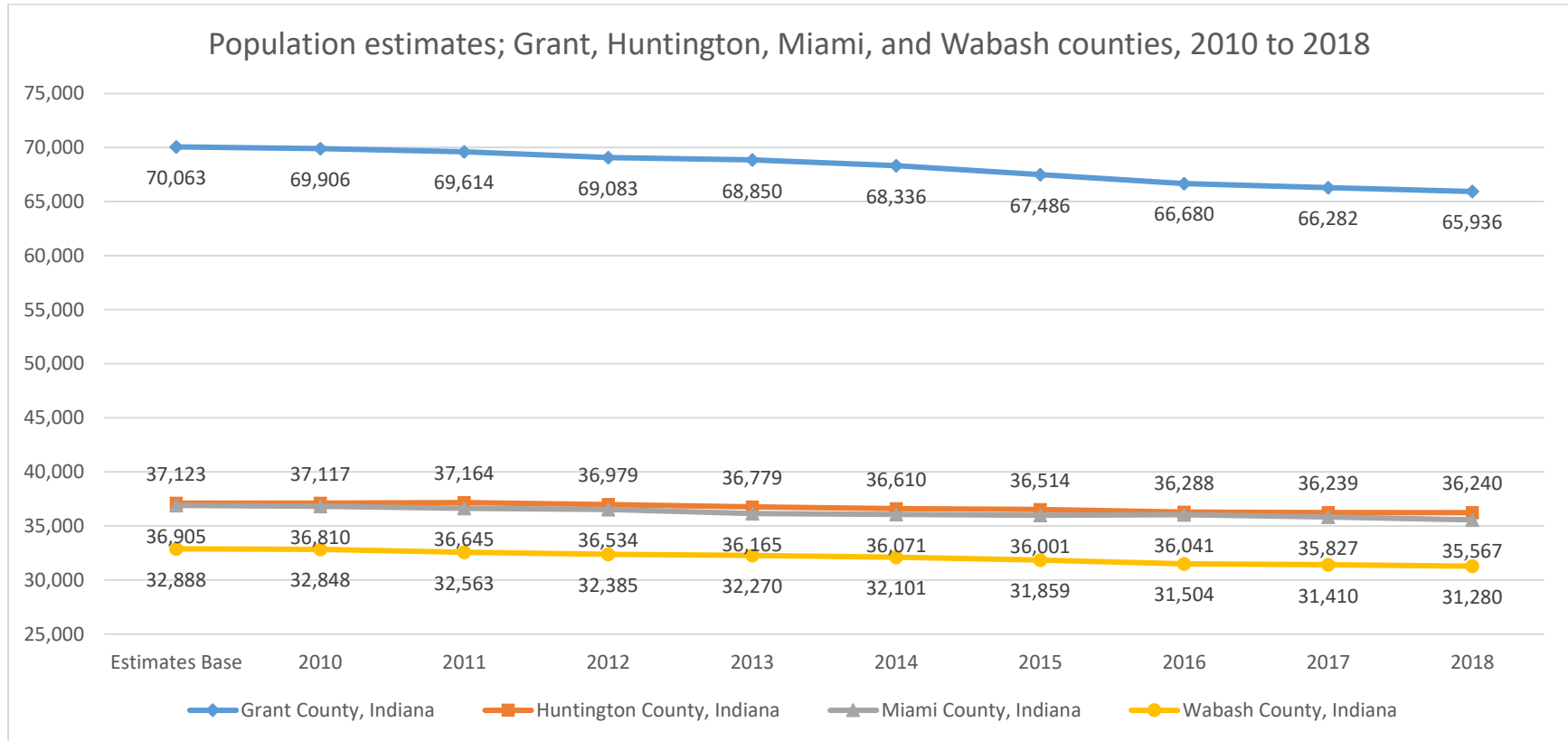
Source: Change calculated by CRI using BEA data

In the 39-year period that Chart 2 shows, Wabash County had positive population change for nine years, resulting in more than 75 percent of the remaining time having the county lose population. The last year with positive population change was 2000. In the last 17 years shown here, Wabash County lost 3,550 people, constituting more than 10 percent of residents.

Chart 3 provides the annual population estimates from the U.S. Census Bureau for Wabash County and three surrounding counties – Grant, Huntington, and Miami – that have also experienced ongoing, persistent population loss. CRI selected these counties because of proximity and demographic and statistical similarities to Wabash County.

The Census Bureau calculated an estimates base for 2010 and then population estimates released annually for the count on July 1 of the respective year.

CHART 3: POPULATION ESTIMATES



Source: Table PEANNRES, U.S. Census Bureau

All four counties had annual population decline since 2010. It is a small, persistent decline, year over year. There was no large year-over-year decline, indicating a significant economic event like a plant closure with employee relocation. Rather it is nearly invisible annually. The cumulative effect is jarring. Accordingly, CRI calculated the percentage and numeric change for each county during that time, which is in Table 1.

TABLE 1: PERCENTAGE, NUMERIC POPULATION CHANGE

	Percentage change, 2010-2018	Numeric change, 2010-2018
Grant County	-5.68%	-3970
Huntington County	-2.38%	-877

Miami County	-3.63%	-1243
Wabash County	-4.89%	-1568

Source: Calculated by CRI using U.S. Census Bureau Population Estimates

Grant County had the largest population lost by count and percentage; Wabash County had the second largest.

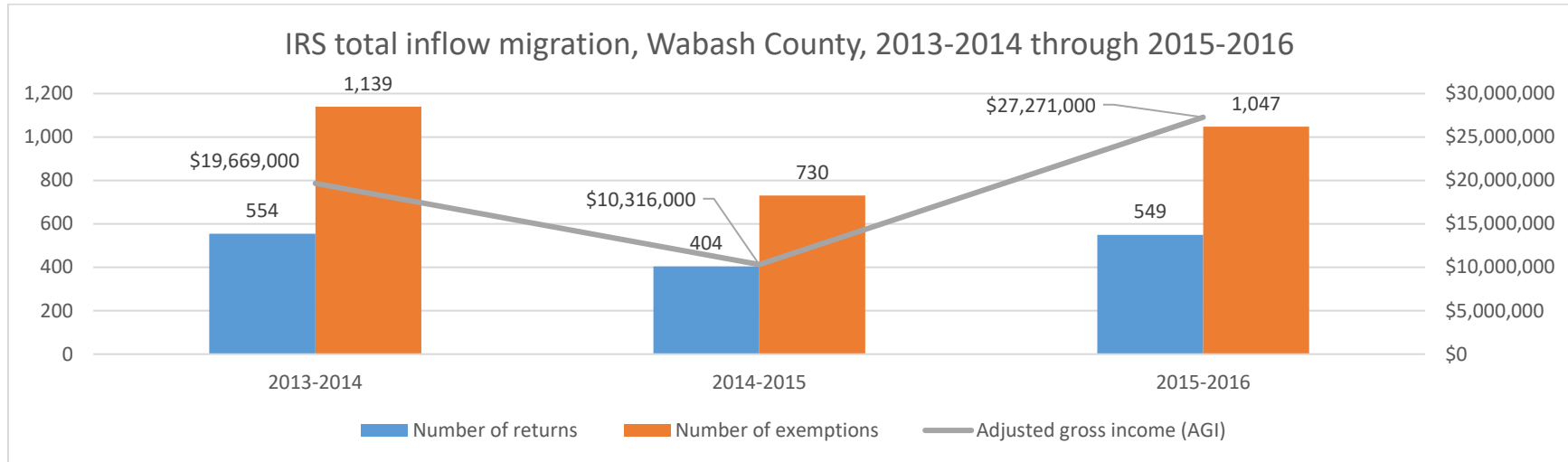
IRS MIGRATION DATA

The Internal Revenue Service issues county-level data about migration patterns from individual tax returns. It provides annual data about the number of returns filed by those who moved in and moved out of a county as well as information about where they moved to or from, the number of exemptions, and the adjusted gross income for the year the person or family moved. For these purposes, returns can serve as a proxy for households or families. The number exemptions are essentially the population count. Adjusted gross income is interesting to understand whether money is moving in or out.

Since this information is derived from tax returns, it will exclude anyone who doesn't file a tax return or someone who does not file a tax return with a Wabash County mailing address. That second group, tax filers without a Wabash County address, reflects many if not most Manchester University students. University students are counted in the U.S. Census Bureau population estimates and decennial census. Same goes for college students from Wabash County who leave the area to attend school, since their tax return is likely filed at their permanent local address.

CRI used IRS migration data from 2013-2014, 2014-2015, and 2015-2016, which are the three most recent years available. The full data set provides information about the locations where people moved, including select county-level migration patterns if sufficient data exists for release. Chart 4a shows the inflow data for these years.

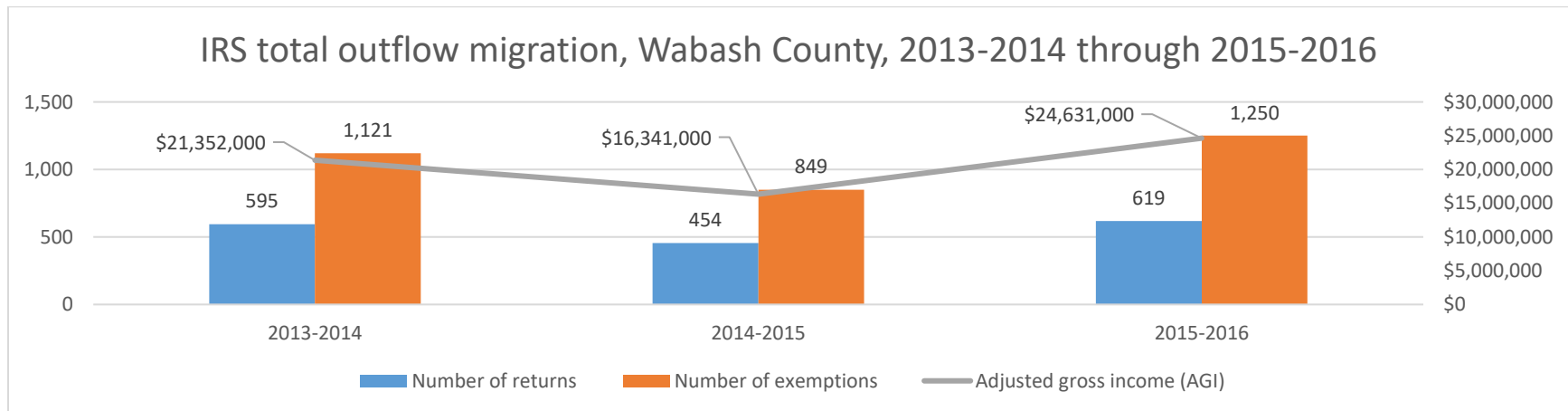
CHART 4A: IRS TOTAL INFLOW MIGRATION TOTALS



Source: IRS Individual Master File, Statistics of Income

Chart 4b shows the outflow migration totals for the same years. What these charts show is that people both move into and move out of Wabash County annually. While the negative net migration numbers get the attention, Wabash County does receive new residents every year.

CHART 4B: IRS TOTAL OUTFLOW MIGRATION TOTALS



Source: IRS Individual Master File, Statistics of Income

Table 2 shows the total net returns, exemptions, AGI (in thousands) from Chart 4a and Chart 4b. The negative numbers indicate that outflow is larger than inflow, i.e. the net negative migration.

TABLE 2: TOTAL NET RETURNS, EXEMPTIONS, AGI

	Number of returns	Number of exemptions	Adjusted gross income (AGI) reported in thousands
Totals (2013-2016)	-161	-304	-5,068

Source: Calculated by CRI using IRS Individual Master File, Statistics of Income

Table 3 evaluates the net number of returns and exemptions as well as the net adjusted gross income (reported in thousands) for the five counties with both inflow and outflow migration data. There were outflow data for Whitley County in 2013-2014, and Howard and Huntington counties for 2015-2016, but are not included Table 3.

TABLE 3: NET NUMBER OF RETURNS, EXEMPTIONS, AGI FOR ALLEN, GRANT, HUNTINGTON, GRANT, KOSCIUSKO, MIAMI COUNTIES

	Number of returns	Number of exemptions	Adjusted gross income (AGI) reported in thousands
Allen County	-50	-66	-2,511
Grant County	29	-58	-1,041
Huntington County	-19	-51	-381
Kosciusko County	-19	1	-1,494
Miami County	-32	-89	-2,315
Total (2013-2016)	-91	-263	-7,742

Source: Calculated by CRI using IRS Individual Master File, Statistics of Income

The totals for Table 2 and Table 3 do not match since Table 2 has additional offsets from other residents that are not reflected in Table 3, since that one has just these five counties. The full inflow and outflow data was provided to the Community Foundation. Although this section includes only three years of data, it demonstrates Wabash County’s trend of incremental population loss, year over year.

ROAD TO ONE MILLION PROJECTION

The Northeast Indiana Regional Partnership with Pittsburgh’s Fourth Economy Consulting issued the Road to One Million (ROTM) plan in 2015 as part of the region’s bid for \$42 million in Regional Cities funding from the state of Indiana. The plan had aggressive county-level population goals to achieve 1 million residents in NEI-11 by 2031.

The ROTM population goal for Wabash County for 2031 was 40,612. The present population estimate at the time of the report was 32,138,⁴ noting an approximately 27% increase in overall population for 2031 goal. Additionally, ROTM goals included population increases by age cohort, which are listed in Table 4, which includes 2014’s population for comparison.

TABLE 4: ROTM POPULATION GOALS BY AGE COHORT

	Wabash 2014	Wabash County 2031
Total Population	32,138	40,612
Annual Growth Rate	-0.3%	1.5%
Preschool (0-4)	1,716	2,053
School Age (5-17)	5,189	6,181
College Age (18-24)	3,260	4,569
Young Adult (25-44)	6,895	10,341
Older Adult (45-64)	8,704	9,817
Older Pop (65 and Older)	6,374	7,651

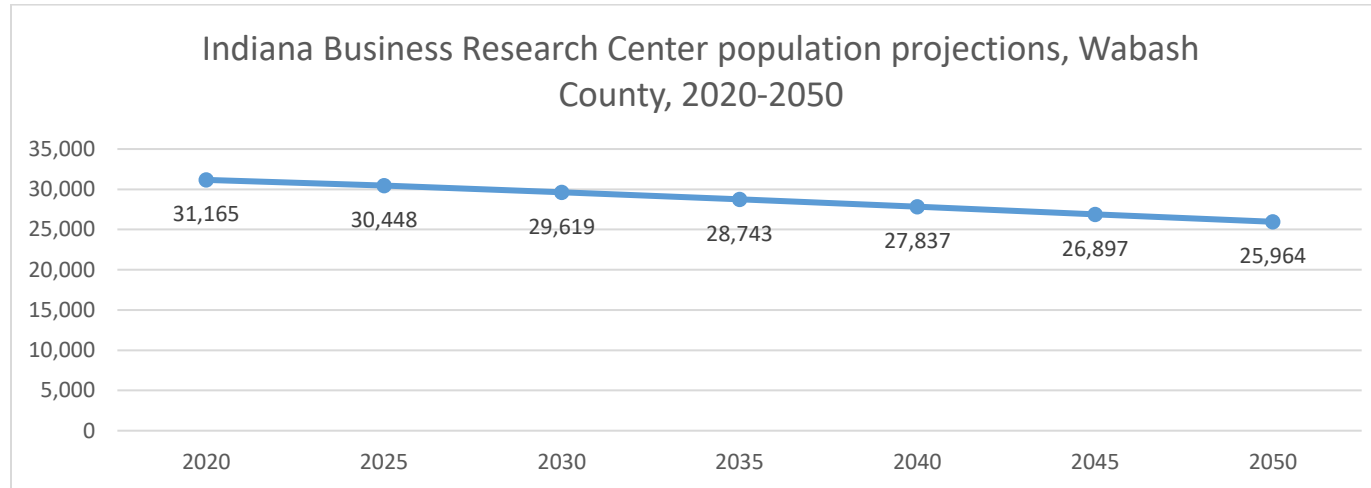
Source: Northeast Indiana Regional Partnership

POPULATION PROJECTIONS

The Indiana Business Research Center (IBRC) at the Indiana University Kelley School of Business creates the state- and county-level population projections for Indiana. The projections are created after the decennial census and projects out 40 years in five-year increments. The projections are for the total population and segmentation by age cohort (five-year and functional) and sex. For this report, CRI opted to use the total and functional groups without sex.

⁴ The Census Bureau adjusts the annual population estimates for subsequent years after the decennial census. Therefore the population estimate used for ROTM calculations do not match population estimates in the report because of those minor adjustments.

CHART 5: POPULATION PROJECTIONS



Source: Population projections, STATS Indiana, Indiana Business Research Center; <http://www.stats.indiana.edu/topic/projections.asp>

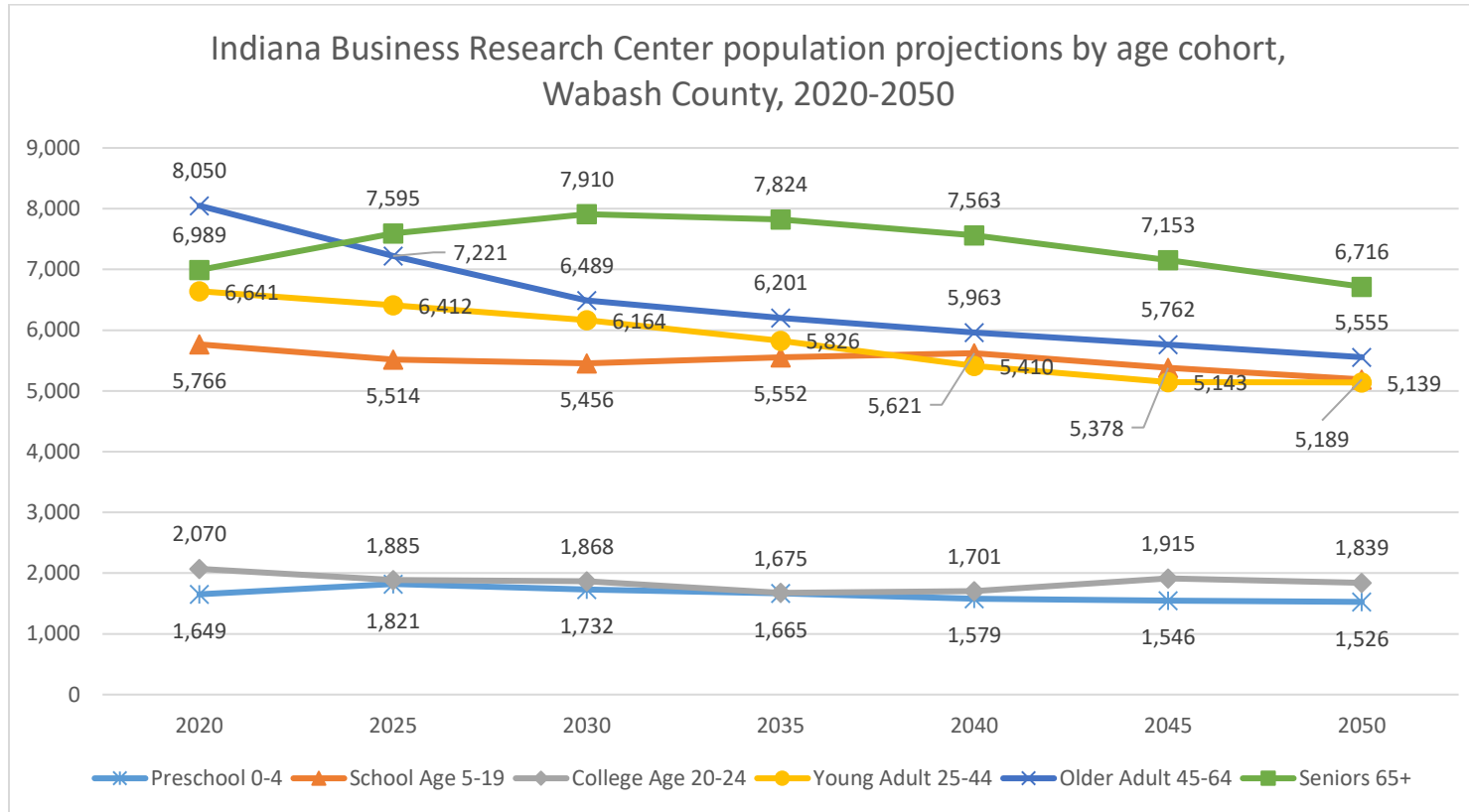
IBRC projects consistent population decline between 2020 and 2050, translating into a 16.69 percent reduction in Wabash County residents over that 30-year period. Comparing the 2015 Census Bureau estimate to the comparable IBRC projection, the decline had accelerated: 31,859 residents compared to 32,075 projected to live there. Jumping ahead to the 2020 projection against the 2018 estimate, the difference was just 115 people. Therefore looking at population trends from the past few years, Wabash County is on track to be at or below the 2020 projection with the 2019 population estimate. Indiana’s population is predicted to increase 7.92 percent from 2020 to 2050 according to the IBRC.

With the 2020 Census next year, Wabash County leaders will want to work to encourage all Wabash County residents to respond to the census, either online, by phone, or via mail.

POPULATION PROJECTIONS BY AGE COHORT

In addition to the overall projections, IBRC calculates projections in 5-year and functional cohorts. CRI elected to use the functional cohorts for this project to better understand the nature of demographic makeup in the years to come, per the projections.

CHART 6: POPULATION PROJECTIONS BY AGE COHORT



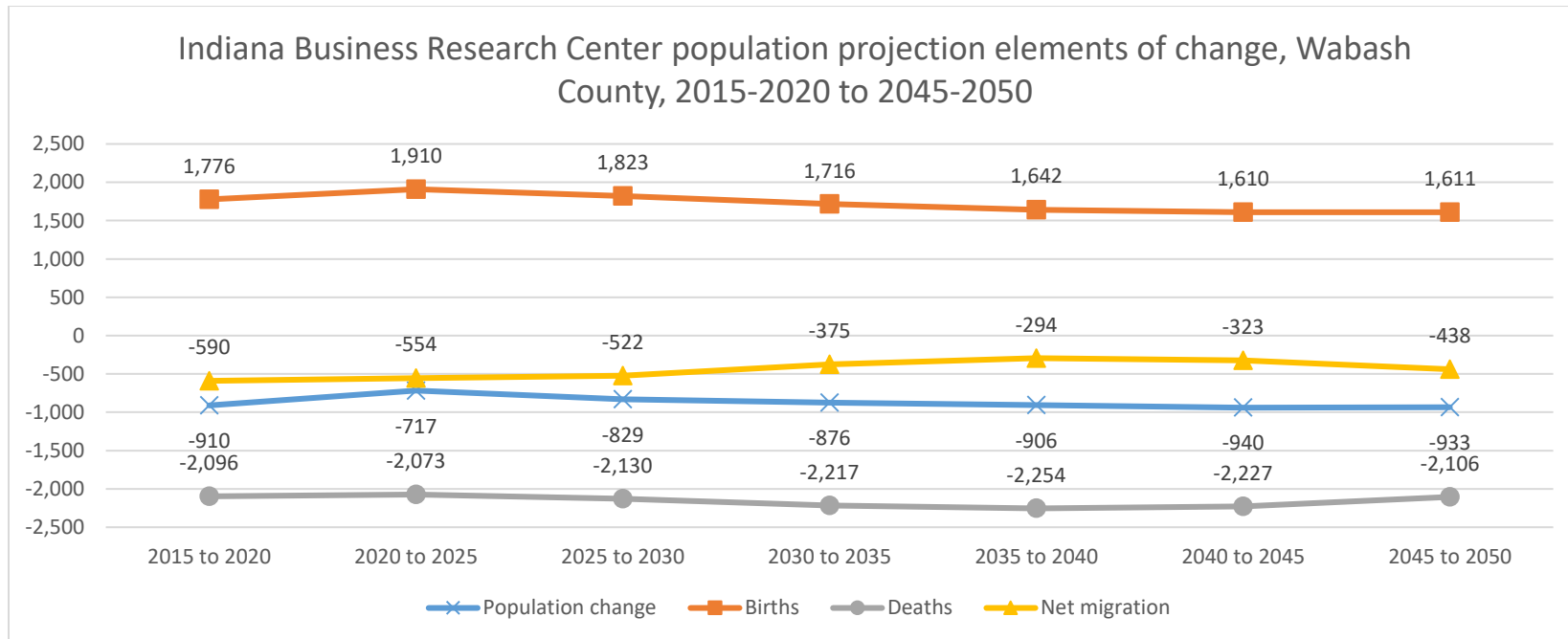
Source: Population projections, STATS Indiana, Indiana Business Research Center; <http://www.stats.indiana.edu/topic/projections.asp>

No age cohort is projected to increase when comparing 2020 to 2050, however there are swings within that time span. With an aging population, the number of adults ages 65 and older are projected to increase over the next 10 years. From there, the oldest share of the population will shrink numerically. The number of children from birth to age 4 and college-age adults ages 20 to 24 are both expected to stay relatively even for the next 30 years, each losing less than 250 people according to IBRC’s projections. School-age children ages 5 to 19 and working-age adults ages 25 to 64 are projected to decline from 2020 to 2050.

POPULATION PROJECTIONS' ELEMENTS OF POPULATION CHANGE

The IBRC population projections include 5-year projections of the respective elements of population change: births, deaths and net migration. The number of negative population events – deaths and negative migration – is tallied against the positive numbers – births and positive migration, if projected. Chart 7 is helpful in understanding what life events – births, deaths, or moves – are driving population increases or decreases.

CHART 7: POPULATION PROJECTION ELEMENTS OF CHANGE



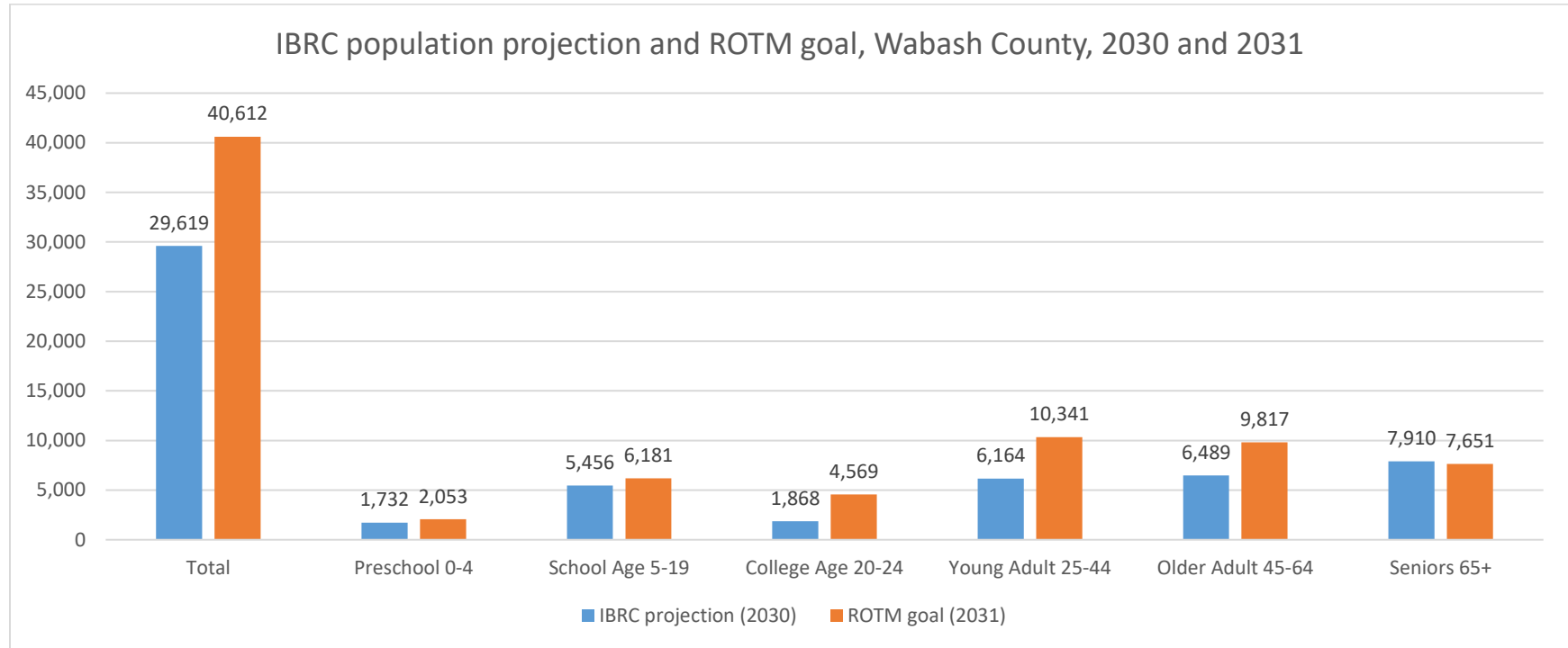
Source: Population projections, STATS Indiana, Indiana Business Research Center; <http://www.stats.indiana.edu/topic/projections.asp>

Looking at births and deaths alone, more Wabash County residents are projected to die than be born each year. Factor in the negative net migration, and Wabash County has internal and external forces driving down its population.

POPULATION PROJECTIONS COMPARED TO ROTM GOALS

This section provides a comparison between Wabash County's IBRC population projections for 2030 to the ROTM goal for 2031 for total and age cohorts. CRI calculated the numeric and percentage differences between IBRC and ROTM numbers, shown in Chart 8 and Table 5.

CHART 8: IBRC POPULATION PROJECTION AND ROTM GOAL



Source: IBRC population projections, Northeast Indiana Regional Partnership Road to One Million information

TABLE 5: IBRC PROJECTIONS COMPARED TO ROTM GOAL

	Numeric difference (IBRC vs. ROTM)	Percentage difference (IBRC vs. ROTM)
Total	10,993	37.12%
Preschool 0-4	321	18.52%
School Age 5-19	725	13.30%
College Age 20-24	2,701	144.61%
Young Adult 25-44	4,177	67.76%
Older Adult 45-64	3,328	51.28%
Seniors 65+	-259	-3.27%

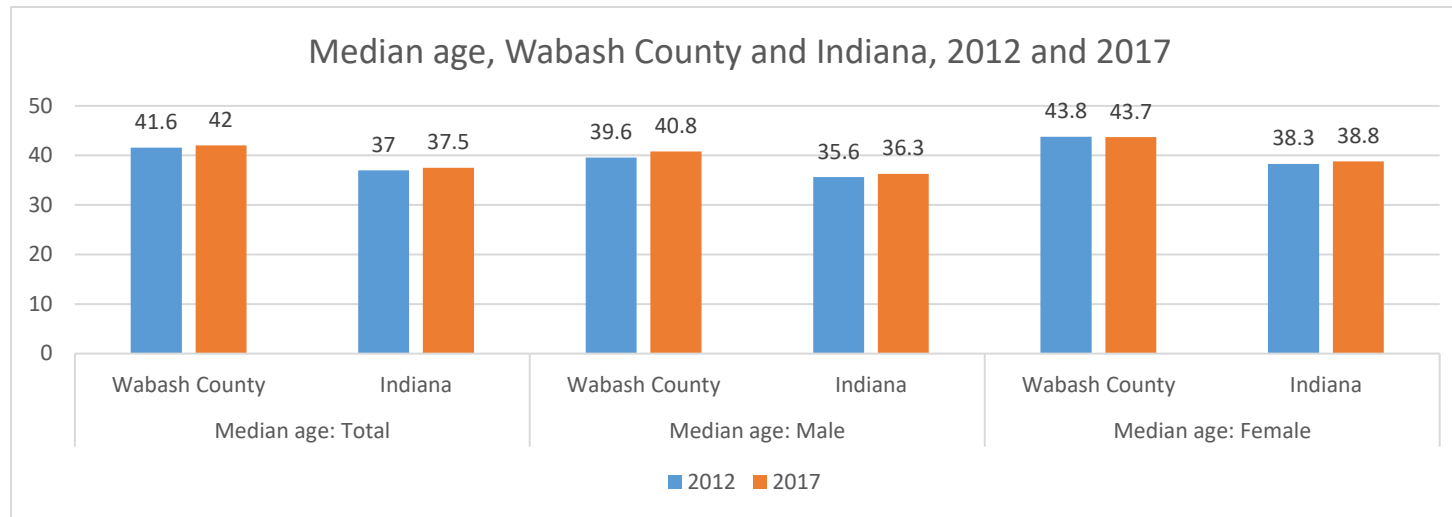
Source: Calculations by CRI using IBRC population projections and ROTM goals

Aside from the 65 and older cohort, the differences exceed 10 percent in each grouping, and three are more than 50 percent. Since existing trend lines indicate that the population is shrinking slightly faster than projected, Wabash County’s actual 2030 population could be smaller than the projected 29,619 residents. For people 65 and older, 2030 is projected to be the height of this age cohort in the next 30 years.

MEDIAN AGE

Median age divides the population into two equal-sized groups. Most Midwestern counties’ median age is increasing, with some faster than others.⁵ Chart 9 shows median age by total and sex. As can be expected, the median age for females is higher than males since women tend to outlive men.

CHART 9: MEDIAN AGE



Source: Table S0101, U.S. Census Bureau

The increasing median age for Wabash County and Indiana reflect an aging population that is not offset by younger residents. Wabash County is not unique in a rising median age as the same is happening in other northeast Indiana counties. The median age is expected to increase. IBRC

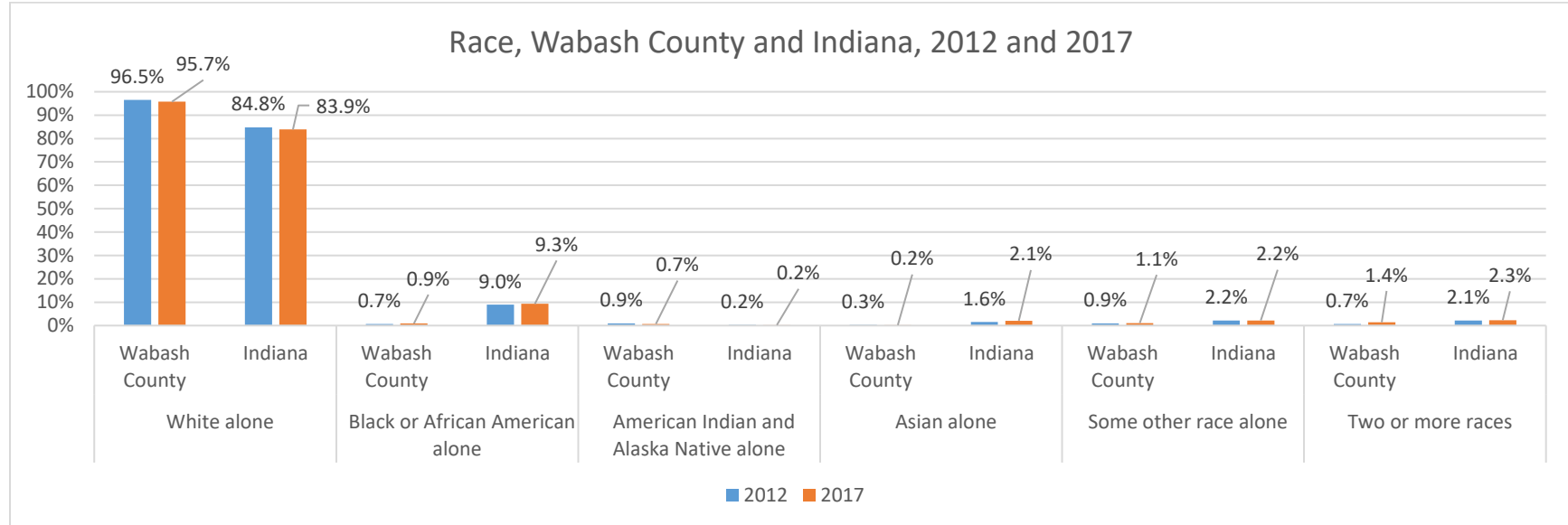
⁵ <https://www.census.gov/library/visualizations/2018/comm/midwest-counties.html> (visited May 20, 2019). Counties with declining median age create a vertical band from Texas to North Dakota and Montana.

projects that Wabash County’s median age in 2050 will be between 45.1 and 51 years.⁶

RACE

The U.S. Census Bureau uses the following racial categories for ACS data: White; Black or African American, American Indian or Alaska Native; Asian; and Native Hawaiian, Other Pacific Islander; or Some Other Race. Starting in 2000, people could chose more than one race on the survey, which is reported as two or more races. Race does not include Hispanic or Latino heritage since that is captured separately in ethnicity. CRI did not include the Native Hawaiian and Other Pacific Islander categories in Chart 10 because of the extremely low or non-existent counts in Wabash County.

CHART 10: RACE



Source: Percentages calculated by CRI; Table B02001, U.S. Census Bureau

Wabash County’s racial diversity did not change in any meaningful way or pattern between 2012 and 2017, meaning it remains overwhelming white.

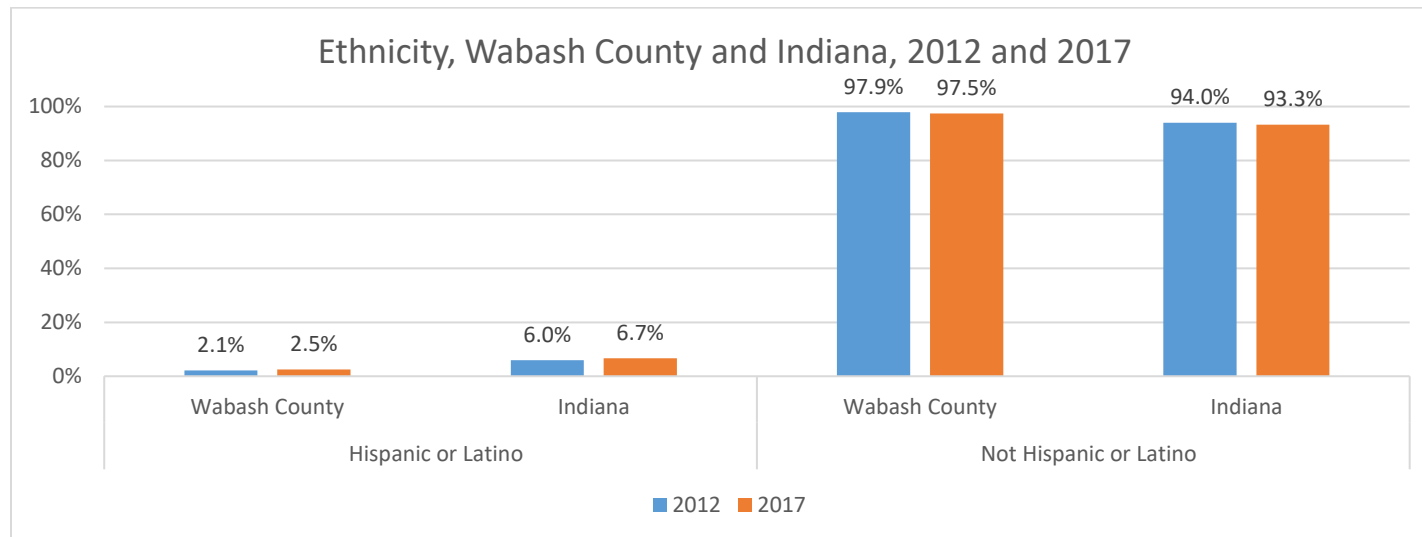
⁶ http://www.stats.indiana.edu/maptools/maps/thematic/projections/2018/county/median-age_2050.png (visited June 14, 2019).

ETHNICITY

The Census Bureau separates race and ethnicity. Ethnicity collects information about the respondent's Hispanic or Latino heritage and is reported as Hispanic and Non-Hispanic. Hispanics or Latinos who identify with the terms "Hispanic," "Latino," or "Spanish" are those who classify themselves in one or more of the specific Hispanic, Latino, or Spanish categories listed on the questionnaire ("Mexican," "Puerto Rican," or "Cuban") as well as those who indicate that they are of "another Hispanic, Latino, or Spanish origin." People who do not identify with any of the specific origins listed on the questionnaire but indicate that they are "another Hispanic, Latino, or Spanish origin" are those who identify as Argentinian, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard, or other Spanish cultures or origins.

People identifying as Hispanic can be of any race.

CHART 11: ETHNICITY



Source: Percentages calculated by CRI; Table B03302, U.S. Census Bureau

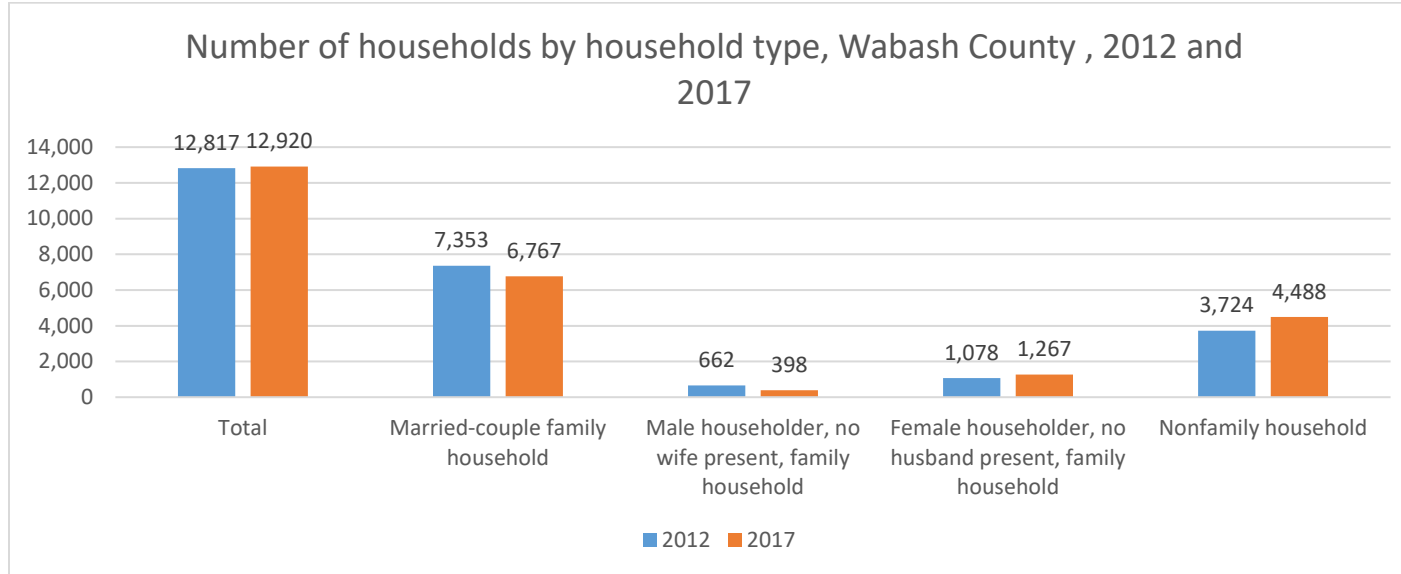
Wabash County and Indiana's share of Hispanic residents grew incrementally between 2012 and 2017, however Wabash County lags behind Indiana.

HOUSEHOLDS

The Census Bureau defines a household as all people who occupy a housing unit.⁷ Housing units include houses, apartments, or room or group of rooms intended for occupancy as separate living quarters.

Families are people living within the same housing unit related by blood, marriage, or adoption. Householder is the person who holds the ownership or lease for the housing unit. In other words, male householder, no wife present, family household or female householder, no husband present, family household would be known to the public as single-parent families. Nonfamily households include single-person households and non-related roommates living together. For Wabash County and northeastern Indiana, nonfamily households are primarily single-person households.

CHART 12A: HOUSEHOLD TYPE BY SHARE (ESTIMATES)



Source: Table S1101, U.S. Census Bureau

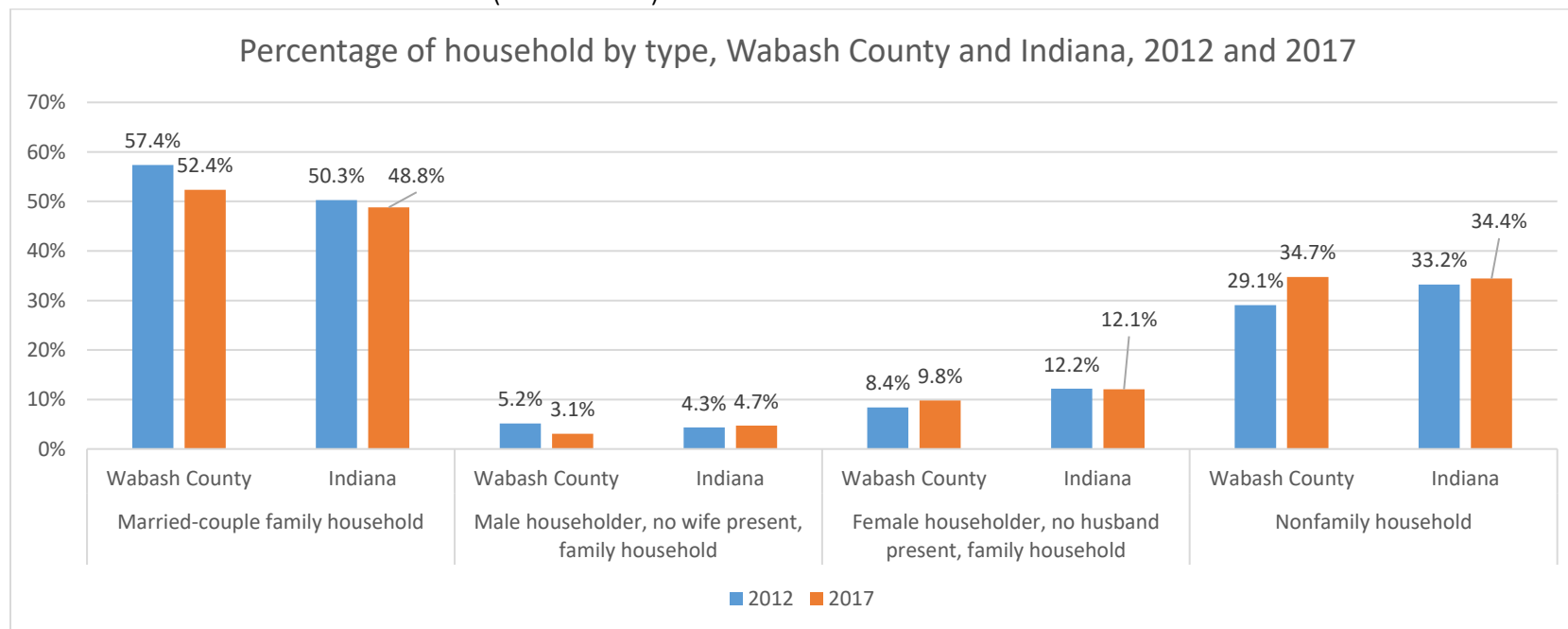
⁷ <https://www.census.gov/programs-surveys/cps/technical-documentation/subject-definitions.html#household>

The total number of Wabash County households remained essentially flat between 2012 and 2017. A shift occurred between married-couple families and nonfamily households, with a 7.97 percent reduction in the number of married-couples households and a 20.52 percent increase in nonfamily households. Single-father households decreased while single-mother households increased in that same period.

HOUSEHOLD SHARE BY TYPE

Chart 12b compares Wabash County’s households by type to Indiana by percentage.

CHART 12B: HOUSEHOLD SHARE BY TYPE (PERCENTAGE)



Source: Percentage calculated by CRI, Table S1101, U.S. Census Bureau

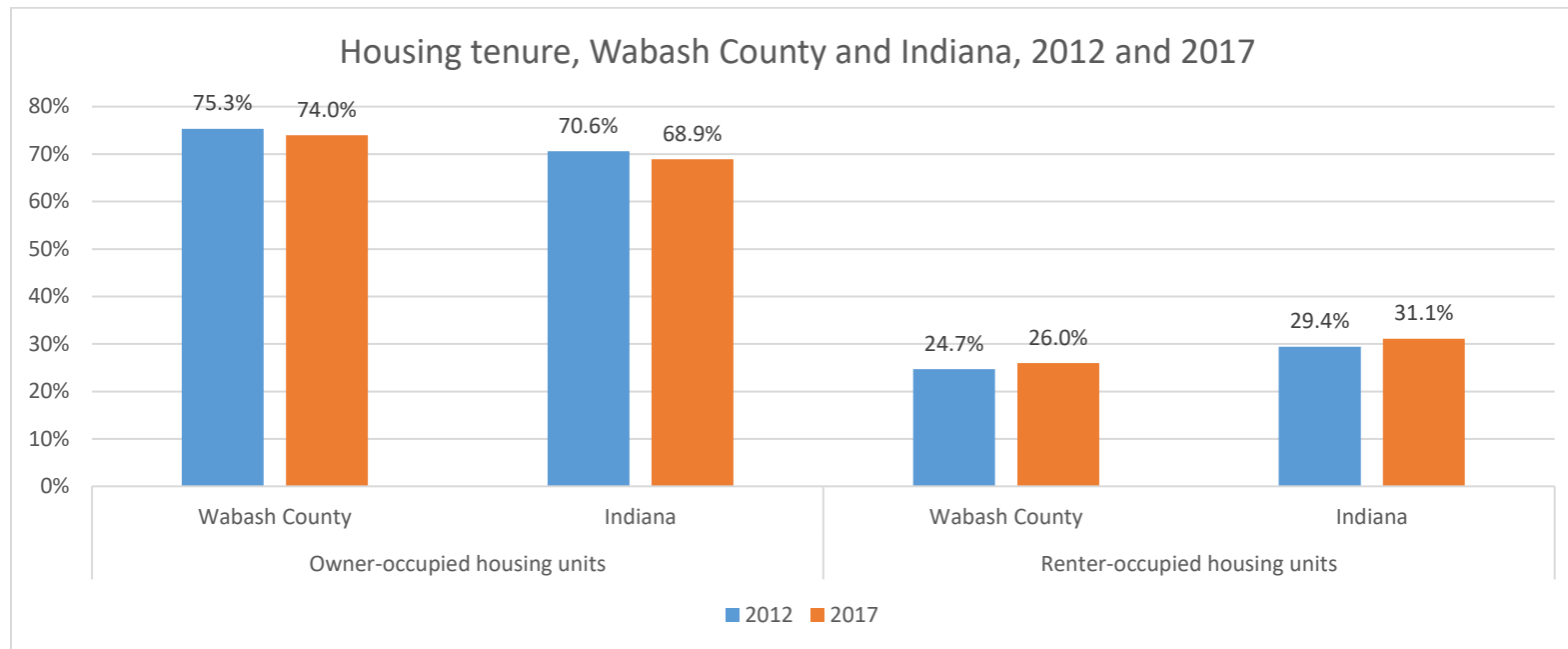
Wabash County’s share of single-parent households is below the state’s. As seen in Chart 12a, Wabash County’s married-couple households went down while nonfamily households went up. The local share of married couples was above Indiana in both data sets. Wabash County’s nonfamily households statistically matched the state in 2017.

For nonfamily households in 2017, Table S1101 indicates about 85 percent are single-person households. Additionally, about half of nonfamily households include a person 60 years and older.

HOUSING TENURE

Housing tenure reflects occupied housing units that are either owner- or renter-occupied. A housing unit is owner-occupied if the owner or co-owner lives in the unit, even if it is mortgaged or not fully paid for. All occupied housing units that are not owner-occupied, whether they are rented or occupied without payment of rent, are classified as renter-occupied.

CHART 13: HOUSING TENURE



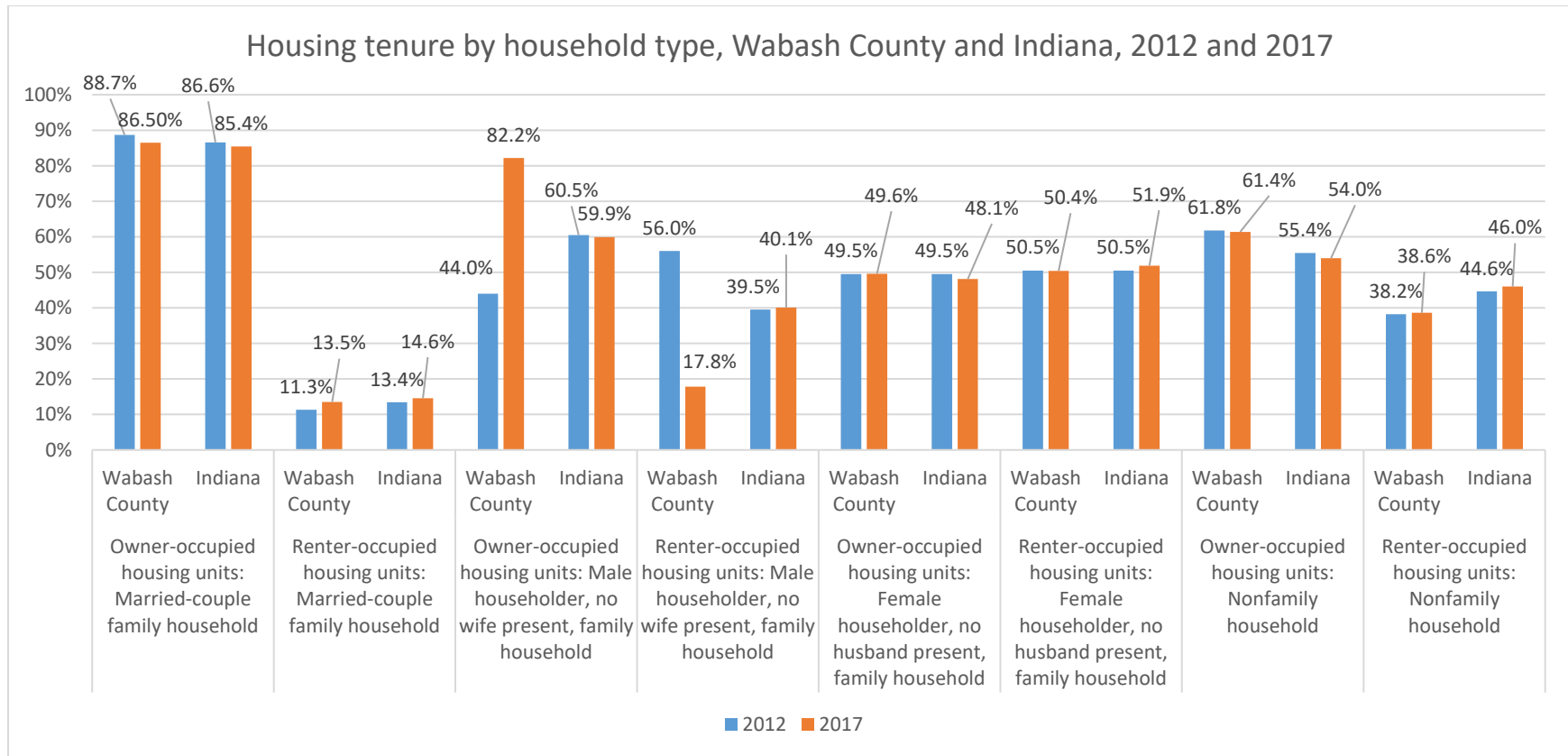
Source: Table S1101, U.S. Census Bureau

Wabash County is a predominantly owner-occupied housing market, with a slight shift toward rental units between 2012 and 2017. Indiana had a larger shift to rental housing units in that same time period.

HOUSING TENURE BY HOUSEHOLD TYPE

Chart 14 shows housing tenure by household type, but this information does not show the demographic characteristics of owners and renters, namely age. The needs of older, retired renters would be different than that of young professionals just starting their careers. Assuming this shift to rental units is ongoing, local leaders will want to evaluate rental housing stock and availability to ensure it meets the needs of Wabash County residents.

CHART 14: HOUSING TENURE BY HOUSEHOLD TYPE



Source: Table S1101, U.S. Census Bureau

Married-couple families dominated Wabash County and Indiana's owner-occupied housing market in 2012 and 2017. The change for Wabash County's single-father families' housing tenure between 2012 and 2017 may be as much a sampling error as a true trend because of the small

sample size for that household type, making it subject to a sampling error that may or may not reflect what is actually happening. Adding to the sampling error theory is that Indiana's numbers do not reflect a similar swing.

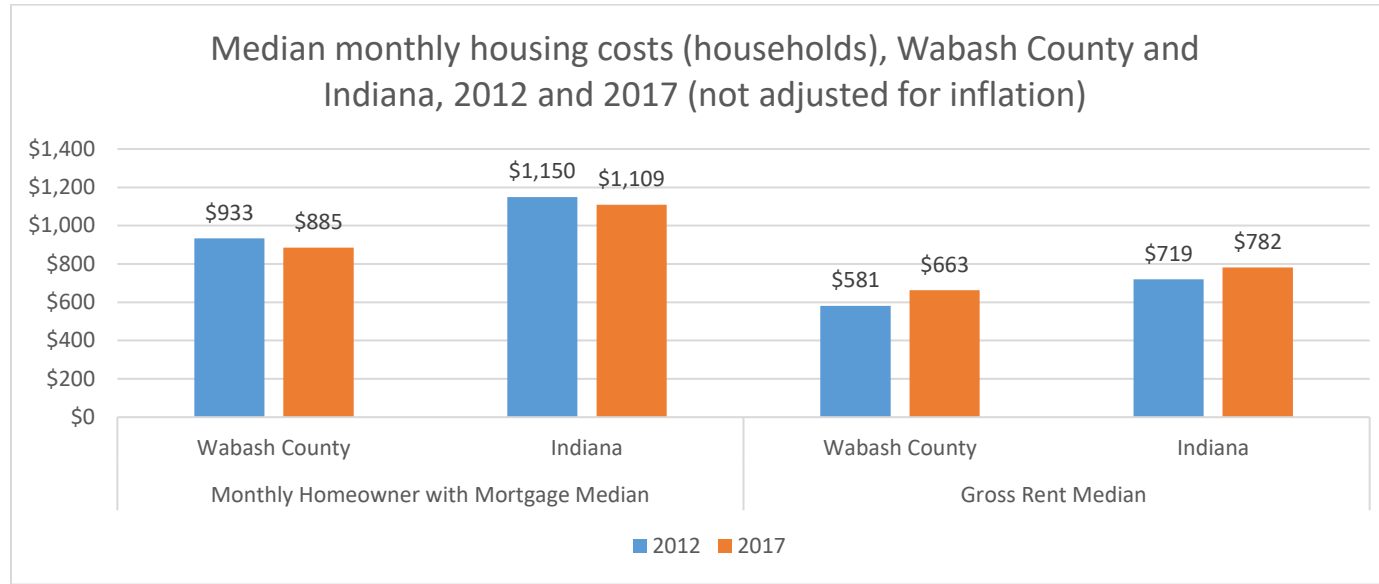
MEDIAN MONTHLY HOUSING COSTS

Housing is a significant portion of household budgets, therefore it can influence where people chose to live. Monthly housing costs provide information on the cost of monthly housing expenses for owners and renters. When the data are used in conjunction with income, the information offers an excellent measure of housing affordability and excessive housing costs. CRI looked at two different housing costs, both using the median: gross rent and monthly homeowner costs for homeowners with a mortgage.

Selected monthly owner costs are the sum of payments for mortgages, deeds of trust, contracts to purchase, or similar debts on the property (including payments for the first mortgage, second mortgages, home equity loans, and other junior mortgages); real estate taxes; fire, hazard, and flood insurance on the property; utilities (electricity, gas, and water and sewer); and fuels (oil, coal, kerosene, wood, etc.). It also includes, where appropriate, the monthly condominium fee for condominiums, and mobile home costs (personal property taxes, site rent, registration fees, and license fees).

Gross rent is the contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter or paid for the renter by someone else.

CHART 15: MEDIAN MONTHLY HOUSING COSTS



Source: DP04, U.S. Census Bureau

Wabash County residents, owner and renters alike, enjoy median housing costs below the state. The median costs for homeowners went down at the state and county levels. CRI has seen a similar pattern with other northeast Indiana counties, probably reflecting lower interest rates for mortgages over time that enabled households to own more house for less. For renters, Wabash County’s median rent jumped 14.11 percent, without accounting for inflation. In contrast, the state’s went up 8.76 percent.

Increases in housing availability, via new construction, may drive housing prices up in the years to come. Therefore Wabash County’s lower median household income⁸ as compared to the state may constrain housing prices, unless higher-income residents move into the county or the local industry mix changes to offer more higher-paying positions.

EDUCATIONAL ATTAINMENT

Educational attainment is a critical measure of understanding the earning potential of workers, since people with more credentials and skills typically command higher wages in the job market. It also helps community leaders understand local workforce skills in general terms. The

⁸ See the Median Household Income section for more information about Wabash County income.

information here reflects the population 25 years and older, which is the standard universe for this measure to reflect the age where many people have completed or are no longer participating in formal education.

The nation as a whole, as well as Indiana and Wabash County, is getting more educated over time. However the disparity in education between age cohorts is less profound in Wabash County than it is in other Hoosier counties. Almost 21 percent of Wabash County residents between the ages of 25 to 34 have a bachelor's degree.⁹ For the county's residents 65 and older? 20.8 percent. In terms of bachelor's degree-or-higher completion in Wabash County, the 35-to-44 cohort has the highest at 21.6 percent and 45-to-64 as the lowest with 15.1 percent.

Educational attainment is attributed to where people live, not where they work. Therefore this measure should not be used to impute the educational attainment of workers in Wabash County, which would reflect the location of employment.

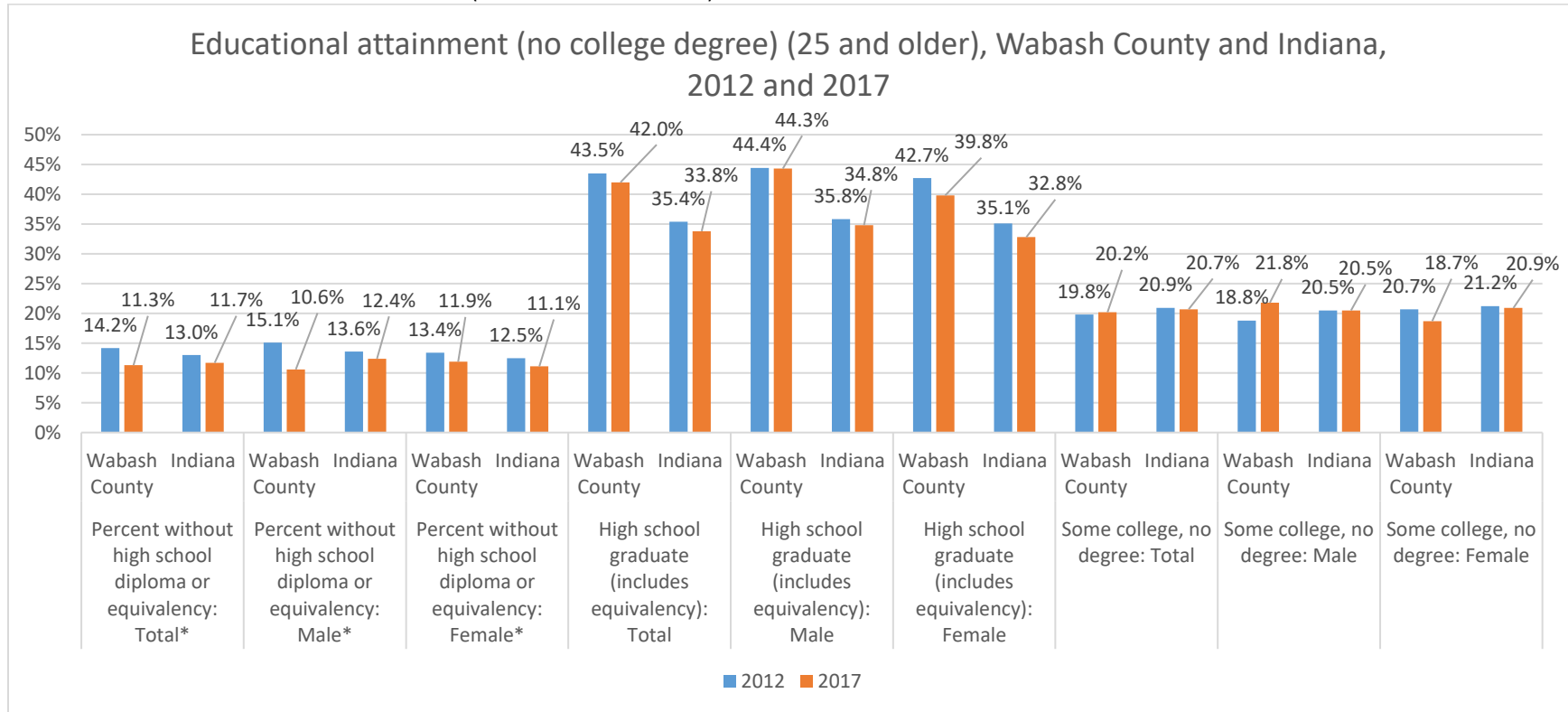
The Census Bureau does not collect information about respondents' certificates or certifications. Therefore no local information exists about the share of adults with non-degree credentialing. In the local manufacturing-heavy economy, this training can be as valuable as a college degree, however CRI has no reliable data to indicate how many Wabash County residents have these particular credentials.

CRI created three charts of educational attainment, separated by total and sex:

1. Adults without a college degree: This is the share of the 25-and-older population who stopped their formal education 1) before graduating high school, 2) graduating high school but not going on to college, or 3) some college but no degree.
2. Adults with a college degree: This reflects the share of the population whose education concluded with 1) an associate's degree, 2) a bachelor's degree, or 3) master's, professional, or doctorate degree. It indicates where the person stopped their education, thus some bachelor's degree holders also have an associate's degree and most if not all people with a master's degree or higher also have a bachelor's degree.
3. Adults who completed high school and adults who earned a bachelor's degree or higher: This shows the share of the population with at minimum a high school diploma and the share with a bachelor's degree or higher. Unlike the other two charts, this shows whether the person completed that level of education, not where he or she concluded formal schooling.

⁹ Table S1501, 2017 5-year data, U.S. Census Bureau.

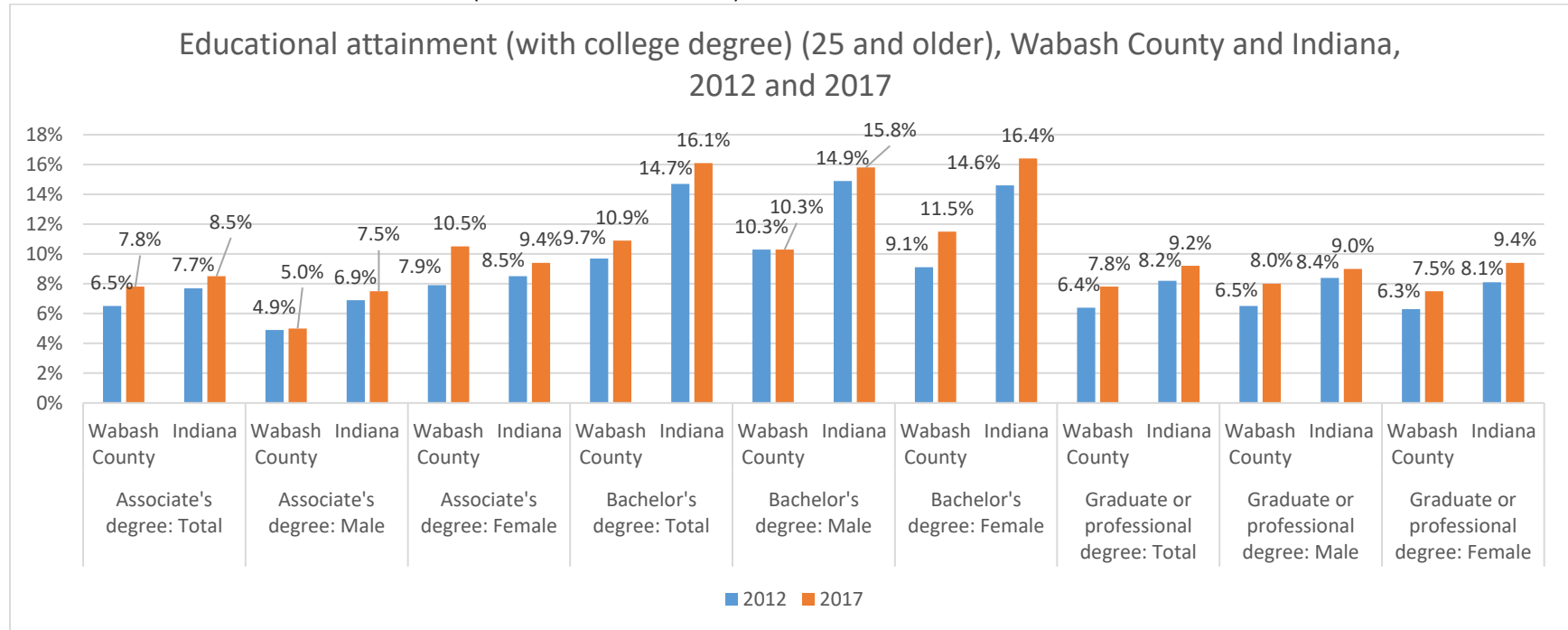
CHART 16A: EDUCATIONAL ATTAINMENT (NO COLLEGE DEGREE)



*Calculated by CRI using U.S. Census Bureau data Source: Table S1501, U.S. Census Bureau

Chart 16a is where declining numbers, at least for the first two measures, show a positive trend. Fewer residents have not completed high school or stopped their formal education with a high school diploma. However Wabash County does have a larger share of adults who did not continue their education after high school, probably reflecting manufacturing’s local dominance, where workers can successfully participate in the workforce with a high school diploma or a certificate or certification. However with the decline of manufacturing jobs in and around Wabash County, the absence of education after high school may limit income prospects.

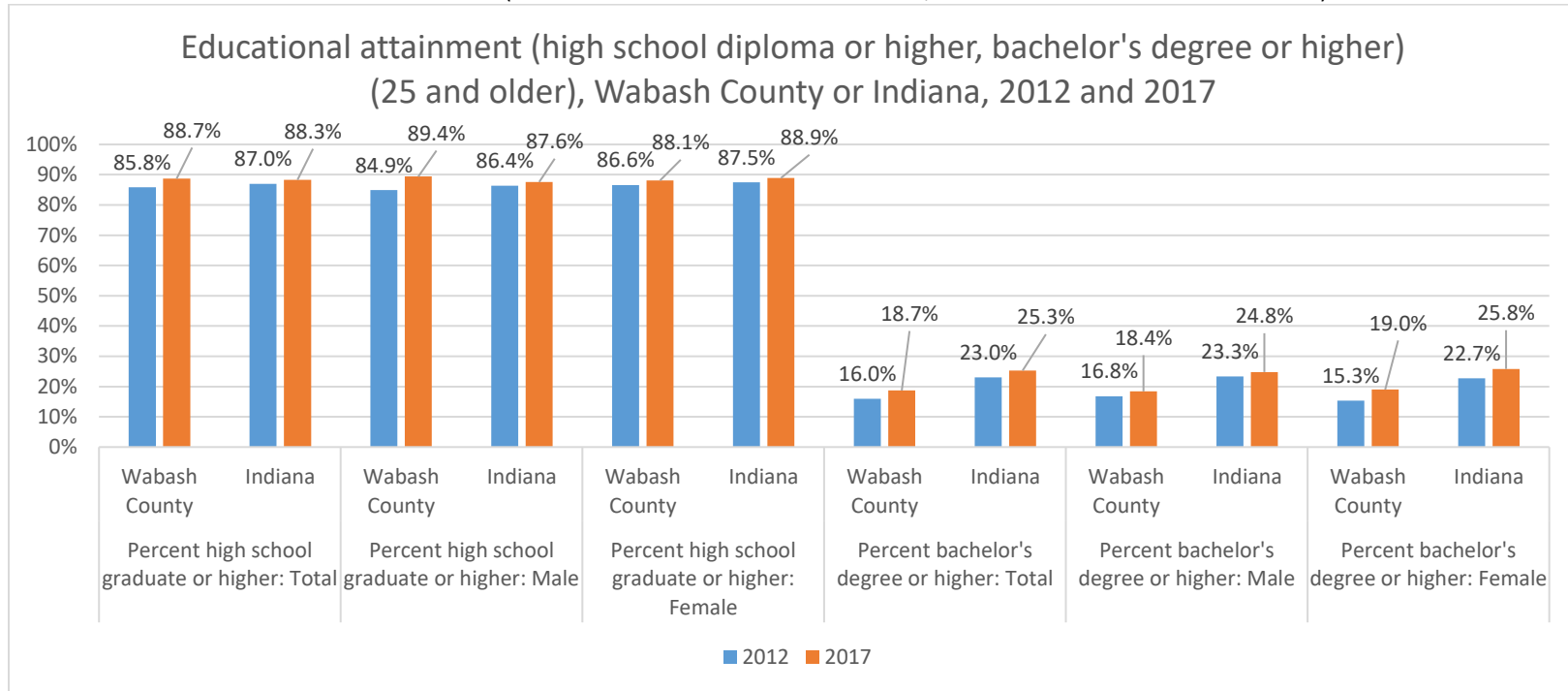
CHART 16B: EDUCATIONAL ATTAINMENT (WITH COLLEGE DEGREE)



Source: Table S1501, U.S. Census Bureau

For associate’s degrees, Wabash County exceeds Indiana for the total and women. Wabash County follows the regional pattern of increased education attainment for bachelor’s, graduate, and professional degrees between 2012 and 2017. However the county lags Indiana, which lags the nation, for bachelor’s degrees and above.

CHART 16C: EDUCATIONAL ATTAINMENT (HIGH SCHOOL DIPLOMA OR HIGHER, BACHELOR’S DEGREE OR HIGHER)



Source: Table S1501, U.S. Census Bureau

Working from the assumption that the high school diploma is the gateway credential into the workforce, Wabash County is comparable to the state. However for bachelor’s degrees or higher, Wabash County continues to lag behind the state in all three populations. However the increase in college graduates residing in Wabash County from 2012 to 2017 is a bright spot for local leaders and creates opportunities for business attraction and entrepreneurship.

INCOME

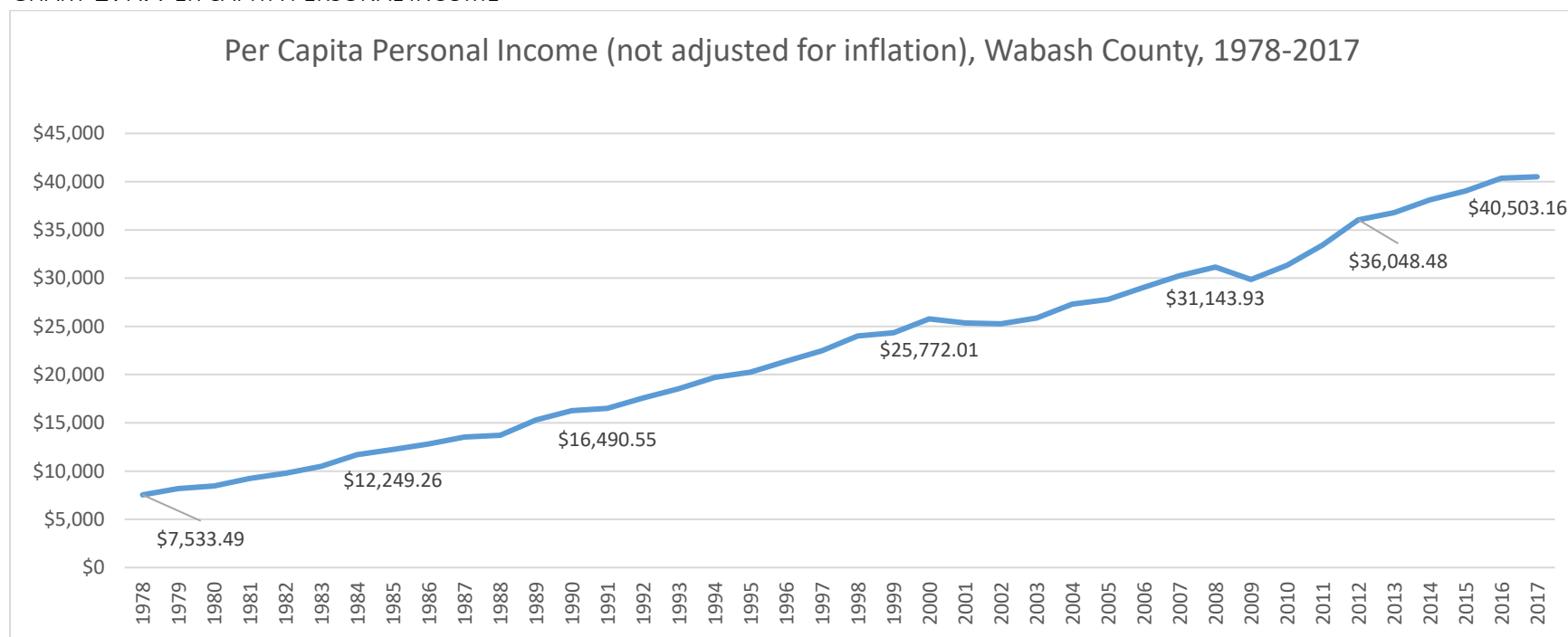
Income is attributed to where people live. Therefore, if a person works in Warsaw but lives in North Manchester, the income will be counted in Wabash County. In contrast, wages and earnings are attributed to the location of employment. In that scenario, the North Manchester resident’s paycheck is counted as part of Kosciusko County’s wages and earnings.

PER CAPITA PERSONAL INCOME (PCPI)

Per capita personal income (PCPI) is calculated by dividing all the personal income¹⁰ – employment earnings, government transfer payments, and investment income – by all the people within a defined geography. Unlike the labor market, which only counts people ages 16 and older, PCPI counts all residents, regardless of age. Therefore locations with a large number of children will have lower PCPI.

Chart 17a shows the U.S. Bureau of Labor Statistics PCPI for Wabash County from 1970 to 2017. 2018's PCPI will be released in November 2019.

CHART 17A: PER CAPITA PERSONAL INCOME



Source: U.S. Bureau of Economic Analysis

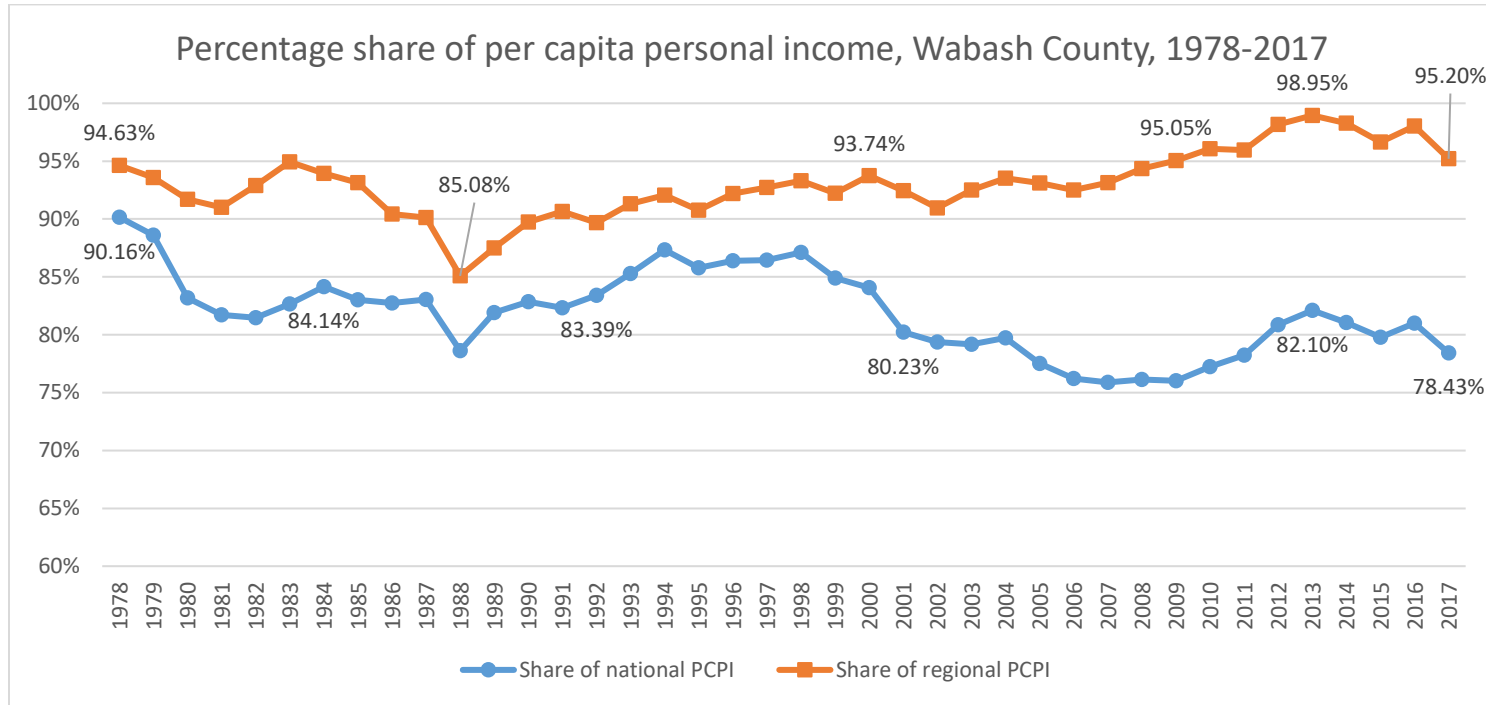
Chart 17a shows the steady upward trend of PCPI within Wabash County over time. However because this chart neither accounts for inflation nor provides comparison to national or regional data, it may appear overly optimistic.

¹⁰ <https://www.ibrc.indiana.edu/ibr/2007/spring/article2.html>

PERCENTAGE OF REGIONAL, NATIONAL PCPI

The Northeast Indiana Regional Partnership has made increasing NEI-11's PCPI to 90 percent of the national calculation as one of its Vision 2030 goals.¹¹ Therefore the accelerating graph in Chart 17a does not tell the full story because it lacks context. Chart 17b compares Wabash County's PCPI against regional and national numbers.

CHART 17B: PERCENTAGE SHARE OF PER CAPITA PERSONAL INCOME



Source: Percentages calculated by CRI using U.S. Bureau of Economic Analysis data

Wabash County's PCPI has never exceeded the nation's since 1970. It peaked in 1973 at 93.72 percent. In 2017, it was 78.48 percent. The low point was 75.88 percent in 2007, just before the country entered the Great Recession.

Wabash County tracked with NEI-11 against the national PCPI through about 2000. From there, Wabash County's regional PCPI share went up. Wabash County's regional share percentage peaked in 2013 at 98.95 percent.

¹¹ <https://neindiana.com/regional-vision/vision-2030>

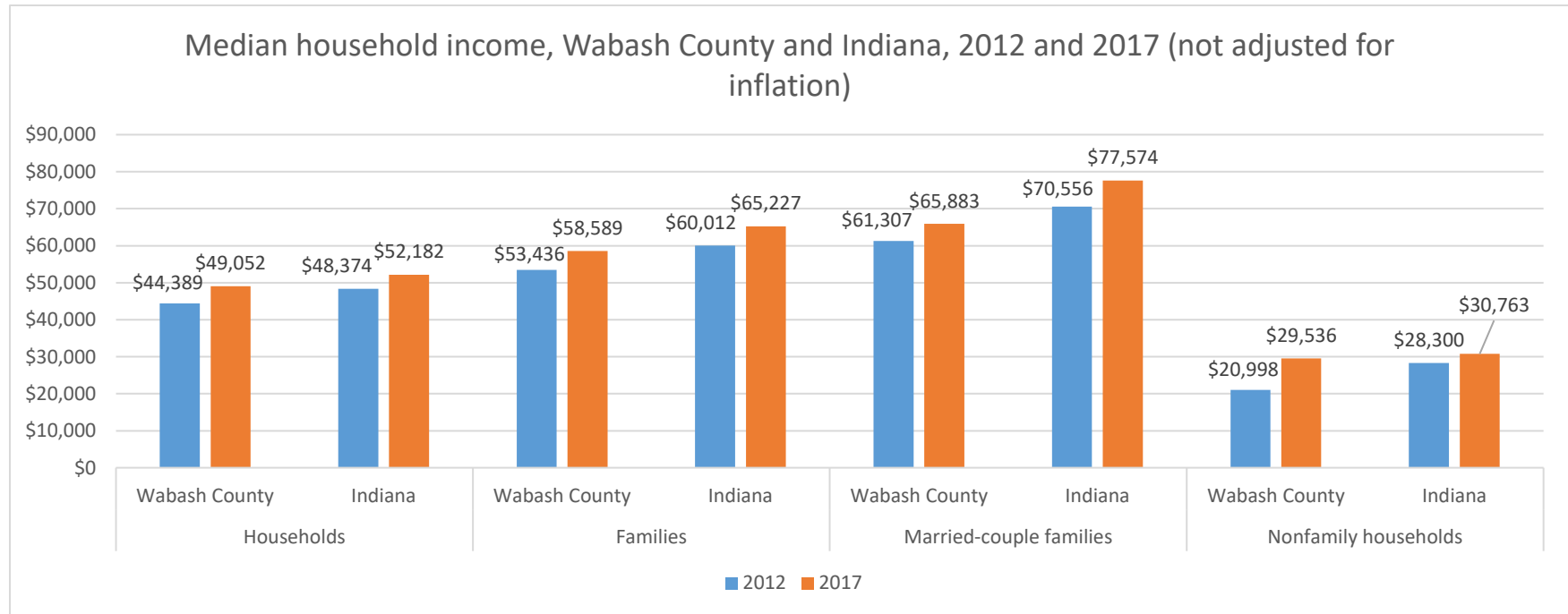
CRI’s position about improving PCPI is that increasing private-sector wages is the most available mechanism to raise PCPI and its relational measures.

MEDIAN HOUSEHOLD INCOME

Here the income measure is median household income – the midpoint where half the households are above and half are below. Although not included in these charts, Wabash’s average household income is above the median: \$49,052 as median vs. \$59,069 for mean.¹² Indiana reflects a similar distribution (\$52,182 vs. \$69,197).¹³

Chart 18a shows median household income by household type.

CHART 18A: MEDIAN HOUSEHOLD INCOME



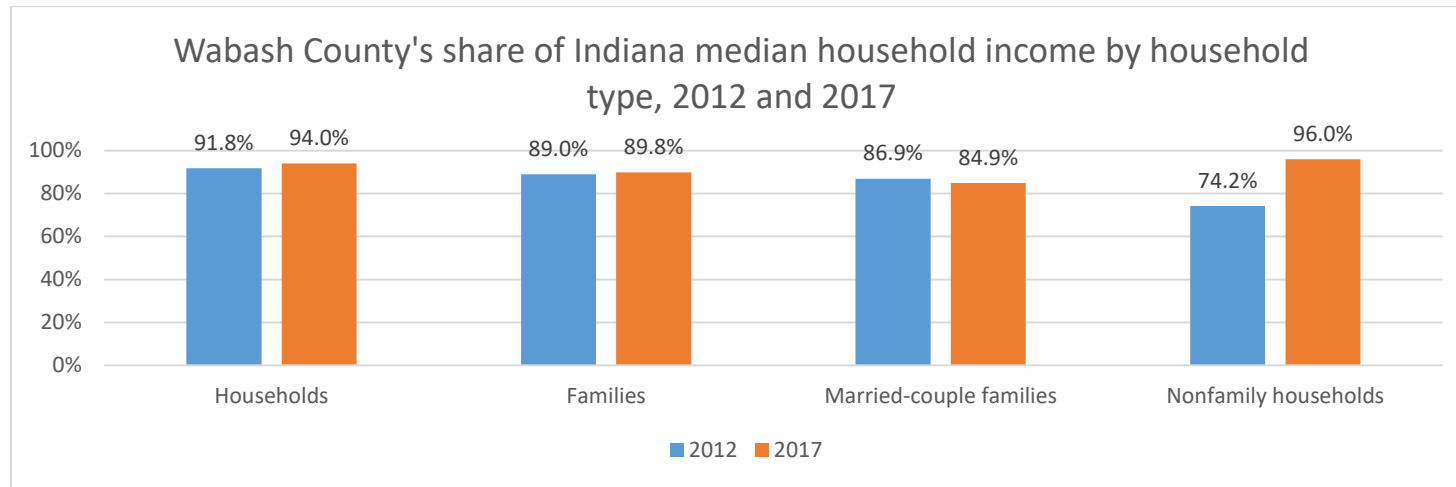
Source: Table S1901, U.S. Census Bureau

¹² Table S1901, 5-year 2017, U.S. Census Bureau.

¹³ Ibid.

Consistent with other northeast Indiana counties, Wabash County’s median household income is below the state’s. Chart 18b compares Wabash County to Indiana by percentage.

CHART 18B: WABASH COUNTY’S SHARE OF INDIANA MEDIAN HOUSEHOLD INCOME



Source: Percentages calculated by CRI using data from Table S1901, U.S. Census Bureau

In 2012, Wabash County’s median household income was 91.8 percent of Indiana’s. Five years later, it increased to 94 percent. The numbers are not as favorable when evaluated across household types. Wabash County’s married-couple families had 84.9 percent of Indiana’s median for that household type in 2017. Wabash families fared a bit better in 2017 at 89.8 percent. 2017’s strongest performing household type was nonfamily households at 96 percent. With the increased share of nonfamily households, that household type helped to buoy Wabash County’s 2017 median household total.

SHARE BELOW FEDERAL POVERTY LEVEL

A community’s share of people living below the federal poverty level (FPL) indicates how many people or households are struggling economically. FPL is a household measure, putting either all or none of the members of the households are below the FPL.

2017 FEDERAL POVERTY LEVEL

The federal government has two different poverty frameworks. The U.S. Department of Health and Human Services (HHS) uses a system that is calculated solely on the size of the household. The U.S. Census Bureau’s poverty guidelines look at householder age as well as the composition of the family/household. Since this is a household measure, either all or none of the members of a household is below the FPL.

Table 6 shows the 2017 poverty levels from the Census Bureau.

The American Community Survey and Puerto Rico Community Survey 2017 Subject Definitions¹⁴ explains how FPL calculations are made for Census Bureau data:

In determining the poverty status of families and unrelated individuals, the Census Bureau uses thresholds (income cutoffs) arranged in a two-dimensional matrix. ... To determine a person's poverty status, one compares the person's total family income in the last 12 months with the poverty threshold appropriate for that person's family size and composition. If the total income of that person's family is less than the threshold appropriate for that family, then the person is considered "below the poverty level," together with every member of his or her family.

Since each of these datasets reflect five years of data, they have coincidentally captured two very different economic conditions. The Great Recession, which officially lasted from December 2007 through June 2009,¹⁵ affected labor markets for years after the formal end, including unemployment rates above 10 percent in Wabash County in 2009 and 2010.¹⁶ The 2012 data captured the worst of the downturn. The 2017 data reflects the economic upswing, including three years of unemployment below 5 percent.¹⁷

TABLE 6: 2017 U.S. CENSUS BUREAU POVERTY THRESHOLDS

2017 Poverty thresholds by size of family and number of related children under 18 years		Related children under 18 years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or more
Size of family unit	Weighted average thresholds									
One person (unrelated individual):	\$12,488									
Under age 65	\$12,752	\$12,752								

¹⁴ "American Community Survey and Puerto Rico Community Survey 2017 Subject Definitions," U.S. Census Bureau (2017), p. 109. See https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2017_ACSSubjectDefinitions.pdf?#.

¹⁵ <https://www.nber.org/cycles.html>

¹⁶ See the Labor Market section of this report for annual unemployment rates for Wabash County.

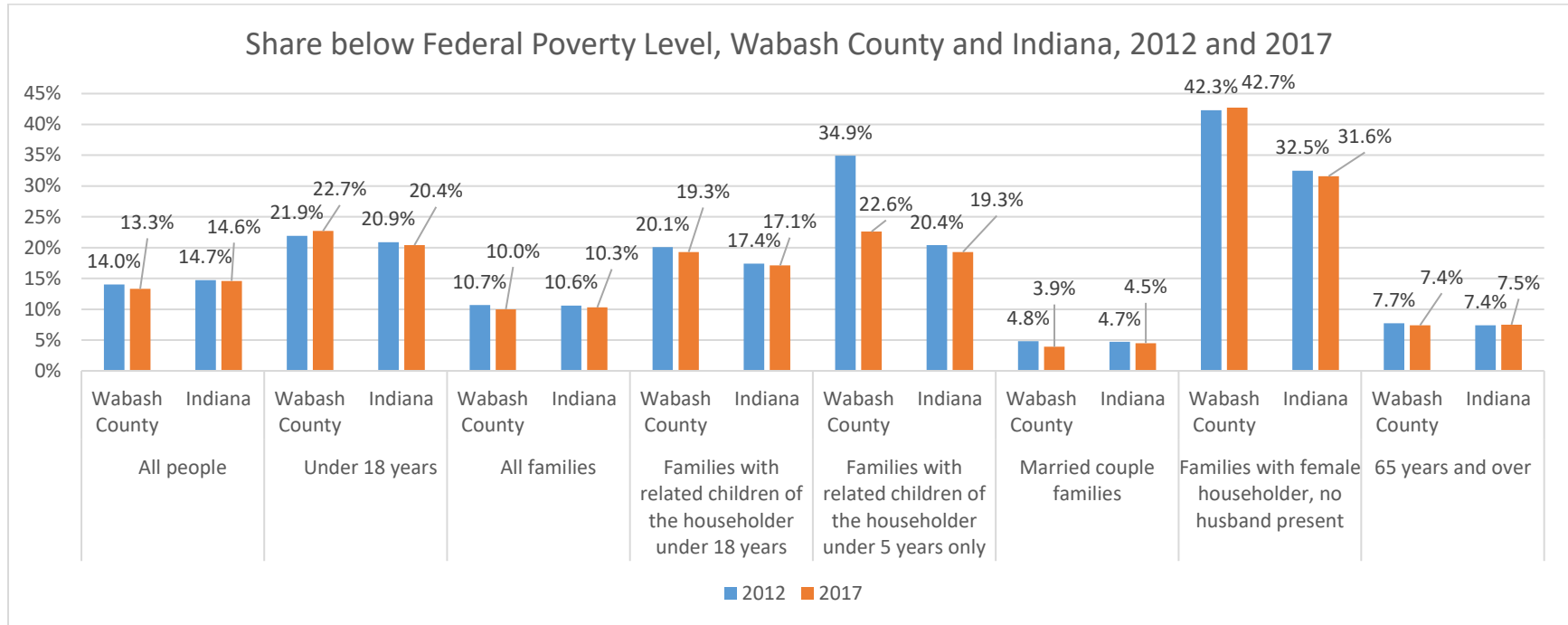
¹⁷ Ibid.

Aged 65 and older	\$11,756	\$11,756								
Two people:	\$15,877									
Householder under age 65	\$16,493	\$16,414	\$16,895							
Householder aged 65 and older	\$14,828	\$14,816	\$16,831							
Three people	\$19,515	\$19,173	\$19,730	\$19,749						
Four people	\$25,094	\$25,283	\$25,696	\$24,858	\$24,944					
Five people	\$29,714	\$30,490	\$30,933	\$29,986	\$29,253	\$28,805				
Six people	\$33,618	\$35,069	\$35,208	\$34,482	\$33,787	\$32,753	\$32,140			
Seven people	\$38,173	\$40,351	\$40,603	\$39,734	\$39,129	\$38,001	\$36,685	\$35,242		
Eight people	\$42,684	\$45,129	\$45,528	\$44,708	\$43,990	\$42,971	\$41,678	\$40,332	\$39,990	
Nine people or more	\$50,681	\$54,287	\$54,550	\$53,825	\$53,216	\$52,216	\$50,840	\$49,595	\$49,287	\$47,389
Source: U.S. Census Bureau										

Unlike the HHS poverty income framework, which simply counts the number of people in the household, the Census Bureau’s calculations are more complex, factoring in age of household members. The cutoff points, though, are similar.

Chart 19 shows the share of people and households below FPL. As with the rest of the data, this reflects information collected during the depths of the Great Recession and the subsequent economic recovery.

CHART 19: SHARE BELOW FEDERAL POVERTY LEVEL



Source: Table DP03, U.S. Census Bureau

The share of Wabash County residents below FPL went down between 2012 and 2017. This is not a consistent pattern for all northeast Indiana counties, so this fact should be highlighted. However the share of children below FPL went up slightly. Other notable trends include declines for all families and families with children, especially those under 5 years old. The share of older residents below FPL remained consistent in both Wabash County and Indiana.

COMPUTERS AND INTERNET ACCESS

The 2008 Broadband Improvement Act mandated the collection of data about computer and internet use, with these questions added to the 2013 ACS survey. Thus 2017 was the first five-year data set to include information about types of computers and internet access, which is why

no 2012 comparison data is shown. Like poverty, this is a household measure but without segmentation by age or other demographic status. CRI can only provide the total share of households and by income level,¹⁸ not any other information about those households.

These data are used by a variety of government agencies, local communities, and other data users. The Federal Communications Commission (FCC) use these statistics to measure the nationwide development of broadband access, as well as the successful deployment of the next generation of broadband technology. These data also allow the FCC to develop measures to increase access to broadband technology and decrease barriers. The National Telecommunications and Information Administration (NTIA) use these data to provide grants that help expand public access to broadband service and fund broadband education and support, particularly to groups that have traditionally underutilized broadband technology.

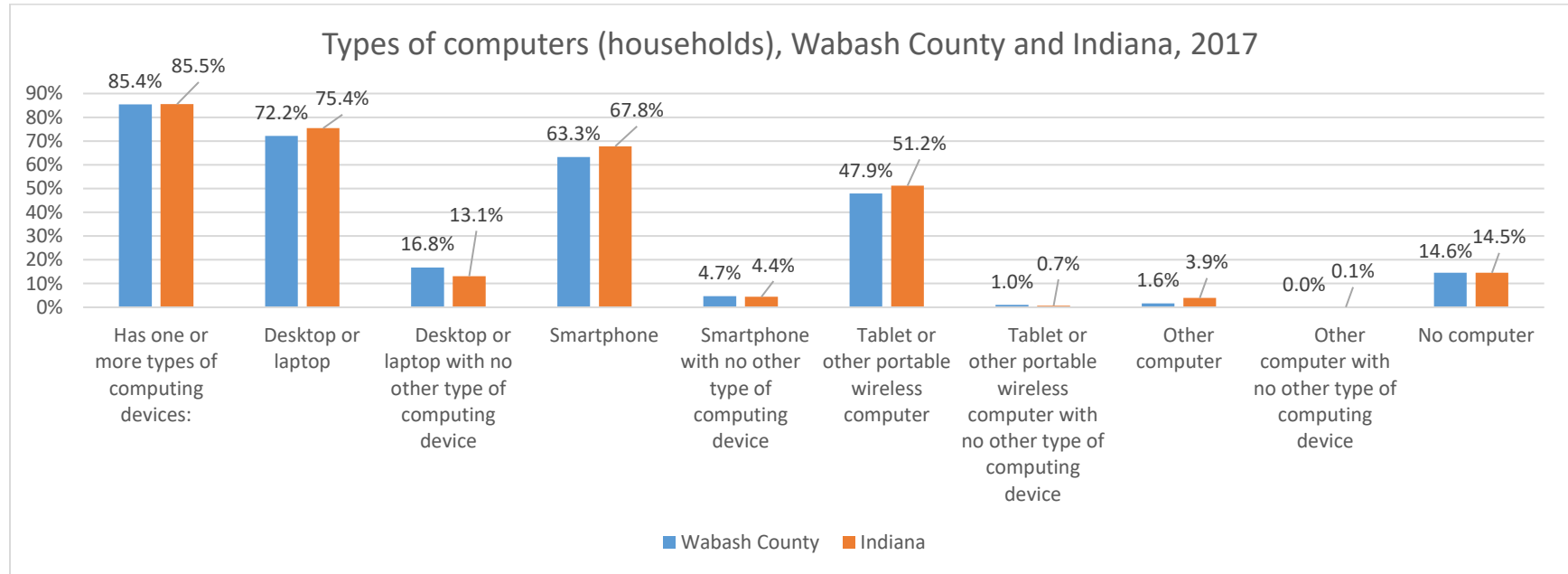
State and local governments can use this information to evaluate access to broadband in their communities, and institute policies and programs to increase access for areas with less connectivity. Businesses and non-profits can use these statistics to analyze computer and internet usage in their communities.

TYPES OF COMPUTERS

Chart 20 looks at the availability – ownership or use – of computing devices within households.

¹⁸ Income cohorts are listed in the Census Bureau tables that CRI provided to CFWC.

CHART 20: TYPES OF COMPUTERS



Source: S2801, U.S. Census Bureau

Wabash County residents’ computer use and access largely mirrors Indiana, with about 14.5 percent of households without a desktop or laptop computer, tablet or smartphone device. Looking more closely at the data, Wabash County households are overrepresented on the share with a desktop or laptop and no other computing device. The county also has fewer households with a smartphone than the state, but both geographies have the majority with smartphones.

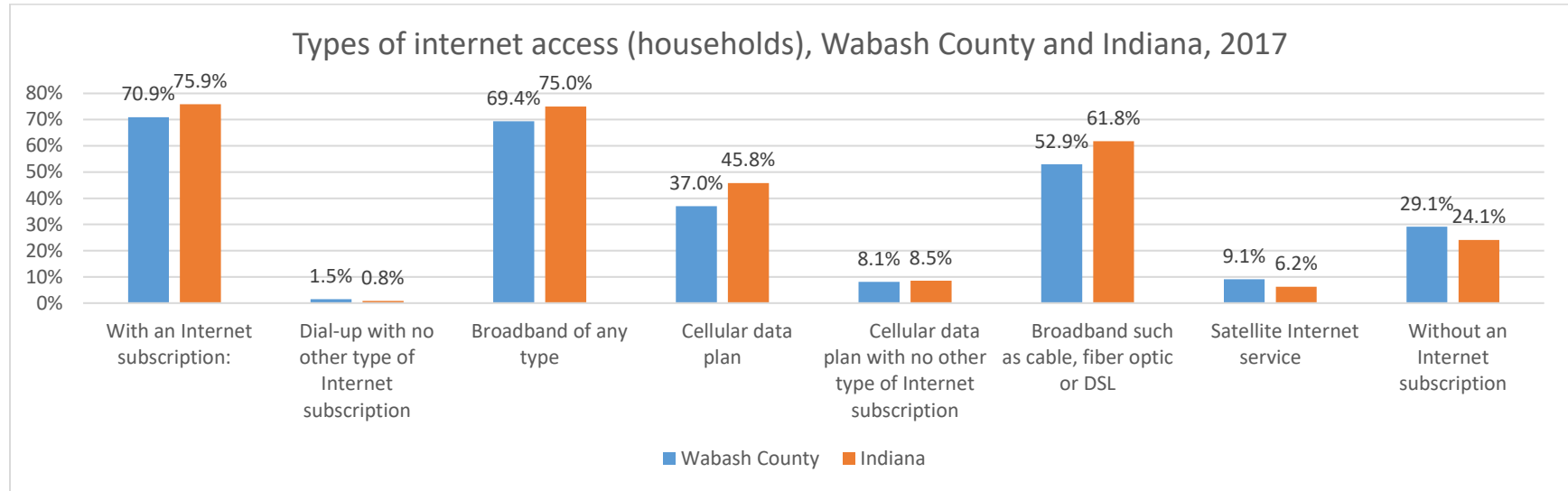
Wabash County is slightly below the state on the share of households with tablets. This difference may, in part, be attributable to few local schools¹⁹ adopting take-home tablets because student use of tablets at home would be reflected in these answers.

INTERNET ACCESS

Chart 21 looks at households’ access to the internet.

¹⁹ According to information from local school leaders, MSD of Wabash County issues iPads to students in kindergarten through second grade, with the remainder of students being issued laptops. Wabash City Schools will issue iPads to all students starting in the 2019-2020 school year. Manchester Community Schools issues its students laptops.

CHART 21: TYPES OF INTERNET ACCESS



Source: S2801, U.S. Census Bureau

About 5 percent fewer Wabash County households have internet access at home than Indiana, comprising just over 29 percent of the county’s households, compared to 24.1 percent of Indiana. Slightly more than half of Wabash County households have traditional broadband subscriptions (cable, DSL or fiber optic) but more than 60 percent of Hoosier households do. Wabash County is overrepresented for satellite internet services and essentially matches the state on households with a cellular data plan as the only internet subscription.

Wabash County residents got some good news with Heartland REMC’s announcement in June 2019 about plans to build a new broadband network for REMC customers with 25x3 Mbps speed.²⁰ Construction is slated to begin fall 2019 and will take five years to complete.

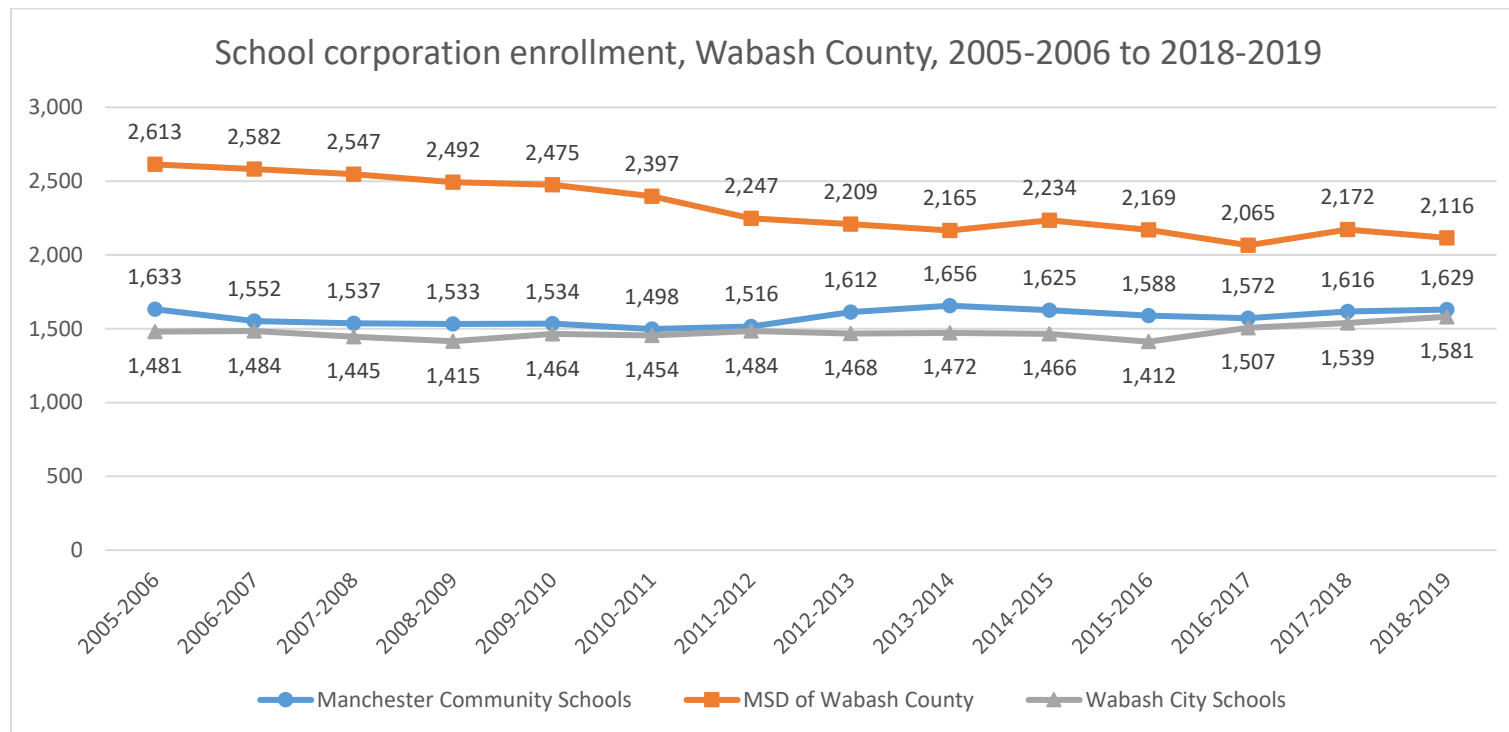
The full Census Bureau table on internet access includes data on internet subscriptions by household income, which may be useful for further evaluation.

²⁰ <https://www.heartlandremc.com/news> (Accessed June 24, 2019)

WABASH COUNTY SCHOOL CORPORATION ENROLLMENT, ENROLLMENT FORECASTS

CRI gathered school corporation enrollment data as well as enrollment forecasts for Wabash County’s three public school corporations: Manchester Community Schools, MSD of Wabash County, and Wabash City Schools. Enrollment data is from 2005-2006 to 2018-2019. The enrollment forecasts come from the McKibben Demographics’ June 2017 report for the three school corporations and projections for school years 2017-2018 to 2026-2027.

CHART 22: SCHOOL CORPORATION ENROLLMENT

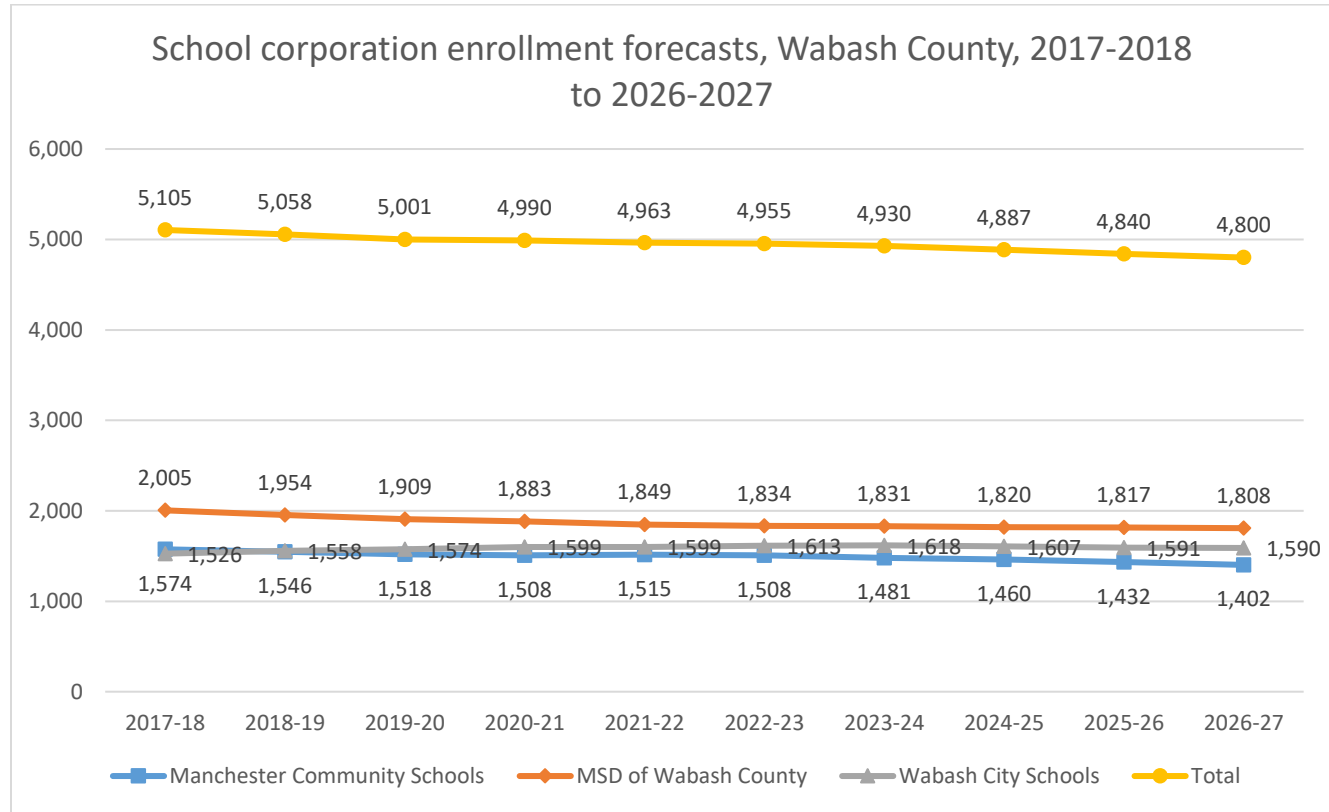


Source: Indiana Department of Education

MSD of Wabash County, the largest of the three districts, has experienced a persistent decline in enrollment – 19.02 percent – from 2005-2006 to 2018-2019. The other two districts had slight yearly variations in enrollment but have generally remained even over these 14 years.

Chart 23 shows the enrollment forecasts for the three local school corporations from the McKibben demographic study²¹.

CHART 23: SCHOOL CORPORATION ENROLLMENT FORECASTS



Source: 2016-17 Demographic Study for Manchester Community Schools, Wabash City Schools and MSD of Wabash County, McKibben Demographics; totals calculated by CRI

The McKibben report forecasts a total enrollment decline over a 10-year period of 5.97 percent. MSD of Wabash County’s enrollment decline is projected to continue through 2026-2027. McKibben predicts Wabash City Schools’ enrollment to remain essentially constant and Manchester’s to go down more than 10 percent.

Since the McKibben report came out, two years of enrollment data exists, to provide a comparison to the annual forecasts, shown in Table 7.

²¹ 2016-17 Demographic Study for Manchester Community Schools, Wabash City Schools and MSD of Wabash County, McKibben Demographics. (June 2017)

TABLE 7: ACTUAL ENROLLMENT COMPARED TO ENROLLMENT PROJECTIONS

	2017-18			2018-19		
	Actual	Forecast	Difference	Actual	Forecast	Difference
Manchester Community Schools	1,616	1,574	42	1,629	1,546	83
MSD of Wabash County	2,172	2,005	167	2,116	1,954	162
Wabash City Schools	1,539	1,526	13	1,581	1,558	23
Total	5,327	5,105	222	5,326	5,058	268

Source: Indiana Department of Education and McKibben Demographics report, with calculations performed by CRI

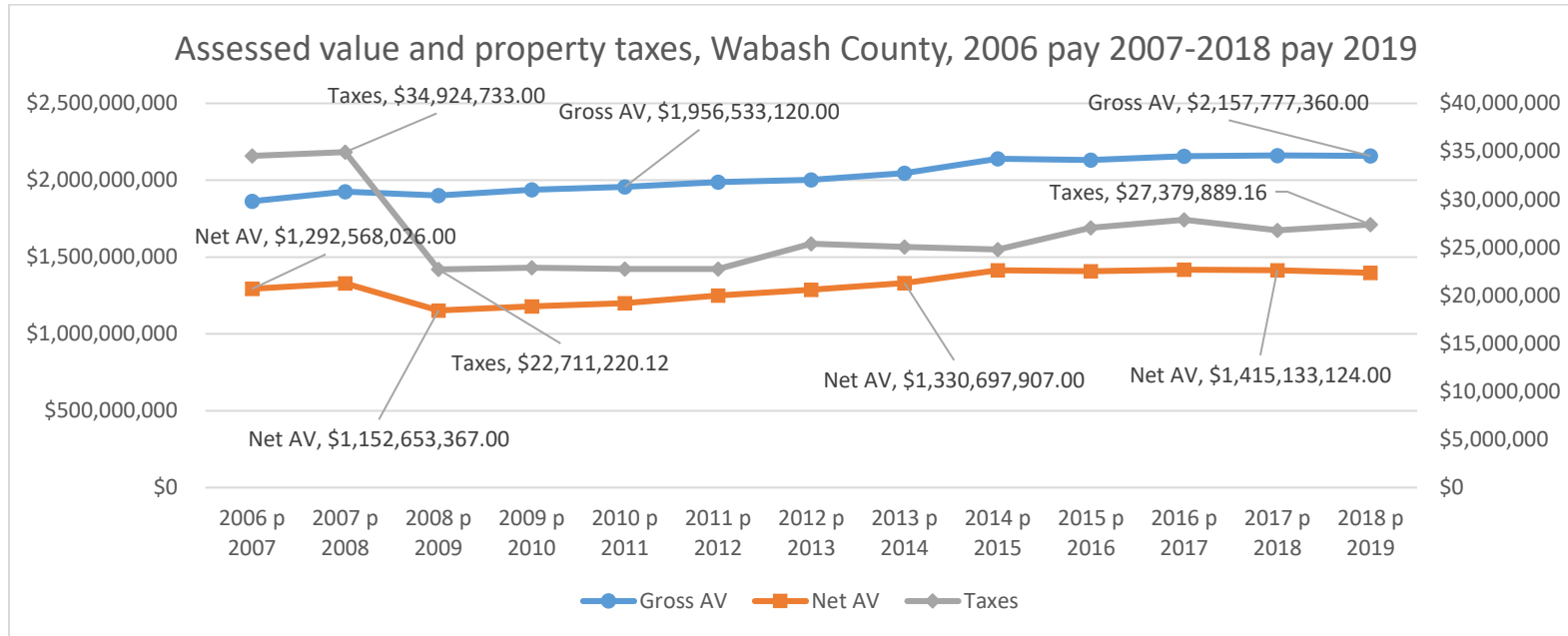
Interestingly, actual enrollment is outpacing the forecasts, which could be due, in part, to the districts enrolling students from outside their boundaries. Accordingly, these enrollment policies need to be factored into these analysis to understand that growth may not be derived from additional students living within the district proper. Since some of the surrounding counties are also projected to have population declines, actual enrollments outpacing forecasts may not continue for the remainder of the report’s forecasts.

ASSESSED VALUES

The Wabash County Assessor is responsible for assessing all real property and select personal property within the county. Those assessments are then used to calculate tax bills through a rather complex system not important to this discussion. What is valuable is understanding the gross assessed value (AV) – the total property value – and the net AV, which is the gross AV minus deductions. In other words, the net AV is less than the gross AV.

Chart 24 shows the gross AV, net AV on the left axis, and taxes on the right axis. Since Indiana property taxes are paid in arrears, the years are listed for the year assessed and year payable: 2017 pay 2018 for example.

CHART 24: ASSESSED VALUE AND PROPERTY TAXES



Source: Wabash County's Assessor's Office²²

The drop in taxes between 2007 pay 2008 and 2008 pay 2009 reflects Indiana's property tax restructuring, including the tax caps of 1, 2, and 3 percent of net AV based on the property types (homesteads, residential rental properties, agricultural, and commercial properties). Property tax collections have increased slightly since the property tax restructuring more than a decade ago, but they remain below what was collected in 2008. Part of that property tax restructure transferred some school costs away from local property taxes to state revenue, accounting for some of the difference.

The restructuring was incidentally followed by the Great Recession and its associated housing crises such as increased foreclosures. Gross and net AVs remained flat for a few years and then experienced a slight increase in 2012 pay 2013. From there, AVs plateaued for 2015 pay 2016 and essentially stayed at those levels through the most recent information.

²² Available at http://assessor.wabash.in.datapitstop.us/cgi.exe?CALL_PROGRAM=C009TAXSTATS&FINDINFO=AVDEDUCTIONS

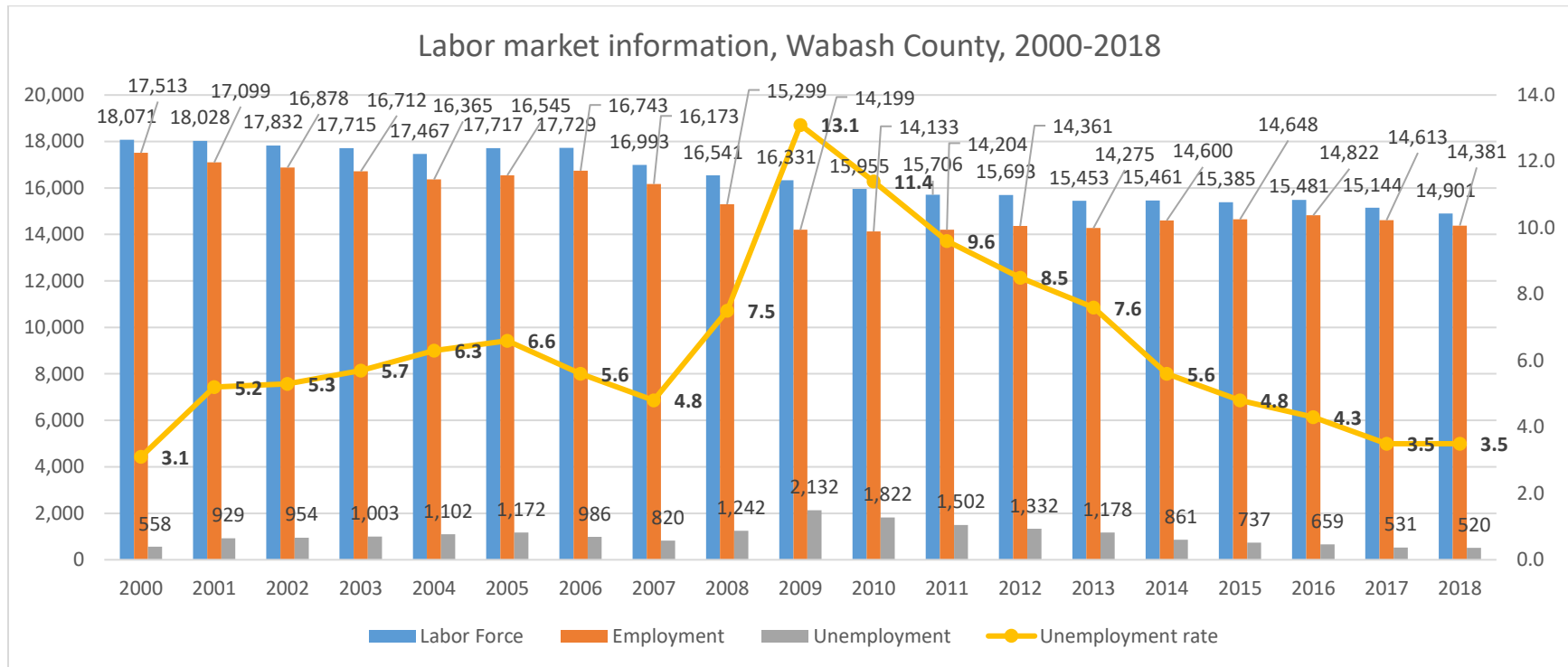
LABOR MARKET AND INDUSTRIES

This section looks at Wabash County’s labor market and industries. Depending on the measure and data source, it reflects where workers live or where the employer is located. Each indicator lists if it reflects Wabash County residents or Wabash County workers.

LABOR MARKET INFORMATION

The labor force is the number of people living within a specified geography who are 1) either working full or part time or 2) not working but actively seeking employment – the unemployed. The unemployment rate is the percent of the labor market who are classified as unemployed. The labor force is calculated for people ages 16 and older. Those who are not working or not actively seeking employment are not in this universe and do not appear in these numbers. These data reflect Wabash County residents, not employees who work in Wabash County but live elsewhere.

CHART 25: LABOR MARKET INFORMATION



Source: Local Area Unemployment Statistics, U.S. Bureau of Labor Statistics

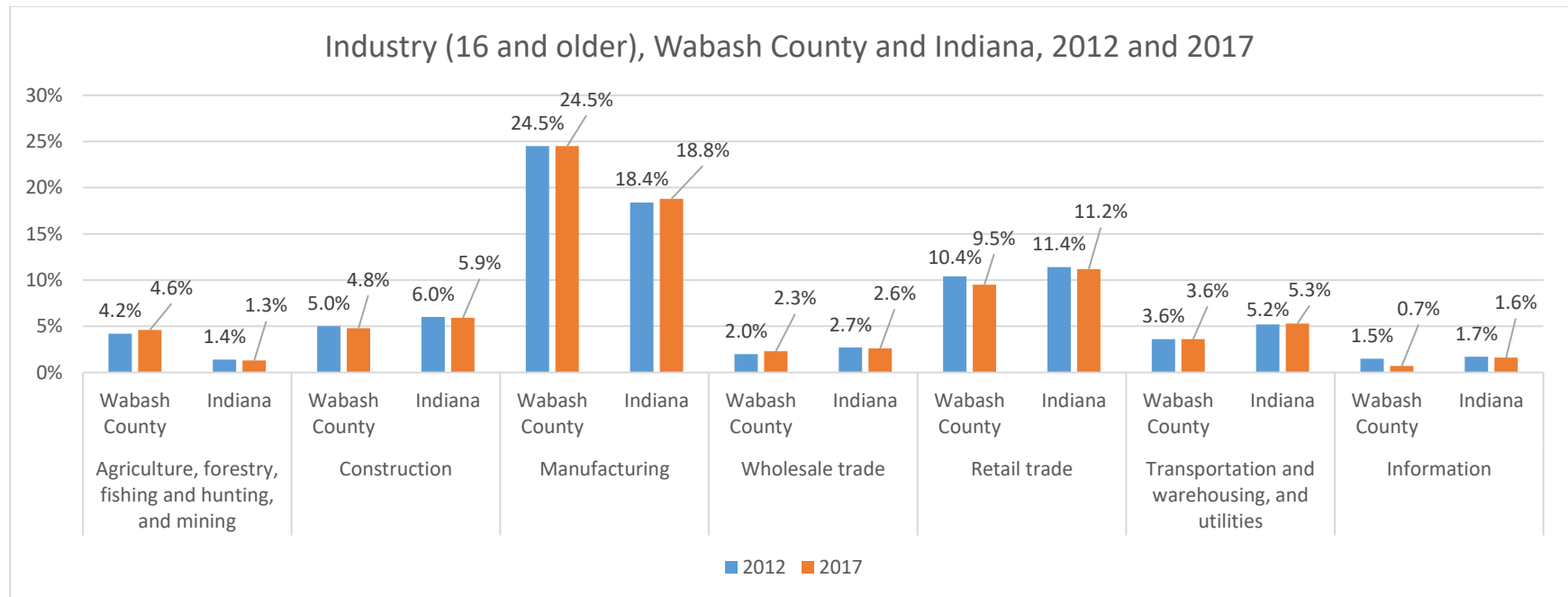
For readers familiar with the Great Recession, the unemployment rate trendline will look familiar with two years of double-digit unemployment. However the decreasing labor market total is not universal. This decline reflects the smaller population, since it counts where workers live, and declining labor market participation rate.

INDUSTRY

Industry is the kind of business conducted by the employer. For employed people, the data refer to the person’s job during the previous week. For those who worked two or more jobs, the data refer to the job where the person worked the greatest number of hours. For unemployed people and people who are not currently employed but report having a job within the last five years, the data refer to their last job. This data reflect Wabash County’s residents, regardless of where the work is performed, not employees working in Wabash County but living elsewhere.

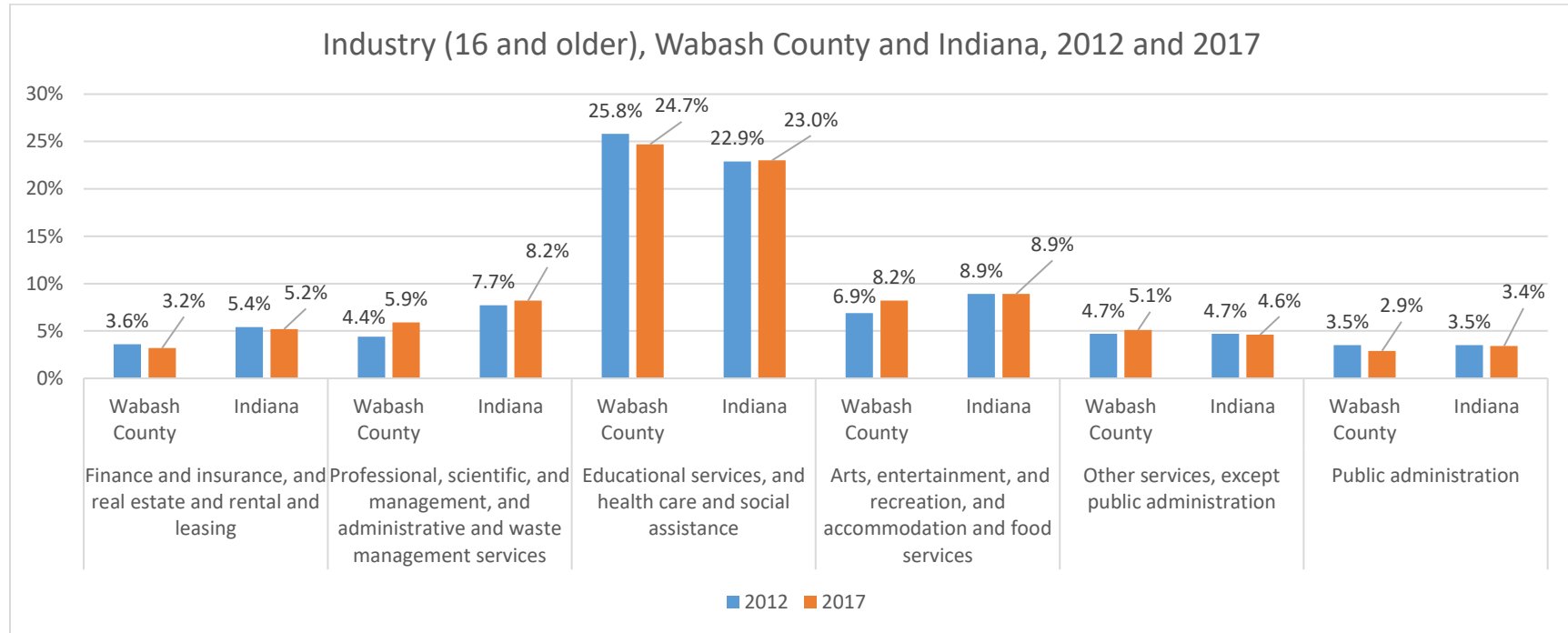
As a practical matter for readability, CRI separated the industry data into two separate charts, sorted alphabetically. Chart 26a has the first seven industry categories. Chart 26b is the remaining six industry categories.

CHART 26A: INDUSTRY BY LOCATION OF RESIDENCE



Source: DP03, U.S. Census Bureau

CHART 26B: INDUSTRY BY LOCATION OF RESIDENCE



Source: DP03, U.S. Census Bureau

Wabash County’s dominant industries are manufacturing and educational services, healthcare and social assistance. In other words, almost half of Wabash County’s residents who worked in 2017 made things, educated people, or took care of the health and medical needs of people.

Wabash County residents were overrepresented, compared to Indiana, in agriculture, forestry, fishing and mining. In contrast, local residents were underrepresented in finance, insurance, real estate, rental and leasing; professional, scientific, management, administrative and waste management services; transportation, warehousing and utilities; and information.

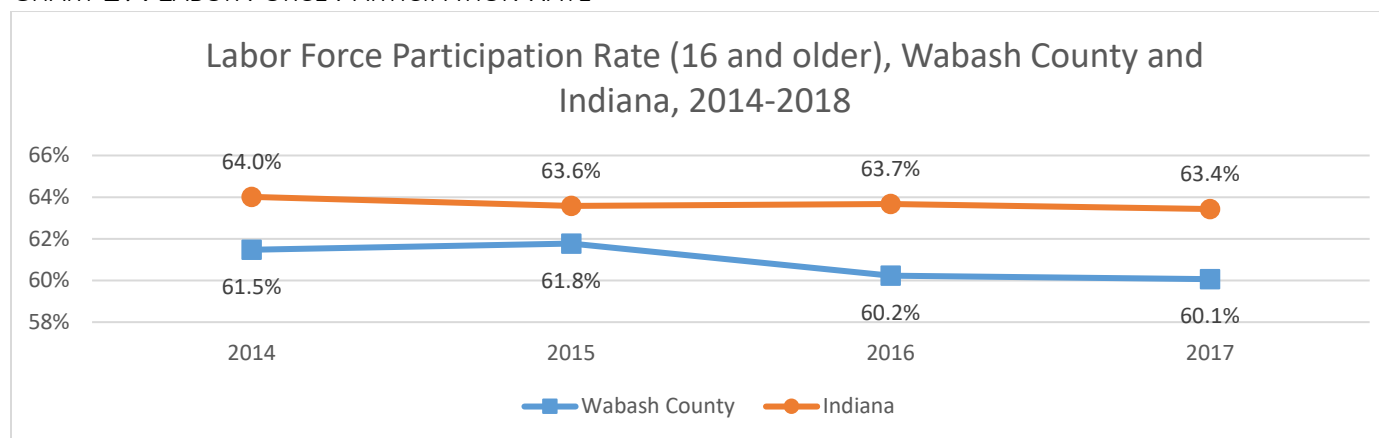
Since these charts evaluate the industries of Wabash County residents, not Wabash County workers, this data should not be used to impute the workforce of Wabash County employers. As noted in the upcoming commuting patterns section, Wabash County has more residents who exit the county for work than people from other counties who enter for jobs.

LABOR FORCE PARTICIPATION RATE

The labor force participation rate is the percent of people ages 16 and older who are employed or unemployed – the total labor market – compared to the total population ages 16 and older. These data reflect Wabash County’s residents, not employees working in Wabash County but living elsewhere.

With the large share of Baby Boomers²³ either retired or preparing to retire in a few years, demographers project Indiana’s labor force participation rate to decline for decades to come.²⁴ Wabash County is already experiencing this phenomenon, as seen in Chart 27.

CHART 27: LABOR FORCE PARTICIPATION RATE



Source: Table K202301, U.S. Census Bureau

In addition to have a smaller share of the working-age population working compared to Indiana, Wabash County’s labor force participation rate is decelerating at a faster pace than Indiana’s in this four-year period of -2.28 percent compared to -0.94 percent.

EMPLOYMENT BY INDUSTRY WITHIN WABASH COUNTY

Unlike the previous labor market indicators, this information looks at employers from Wabash and surrounding counties, regardless of employees’ county of residence. Unlike the other industry information, this section uses annual U.S. Bureau of Labor Statistics Quarterly Census

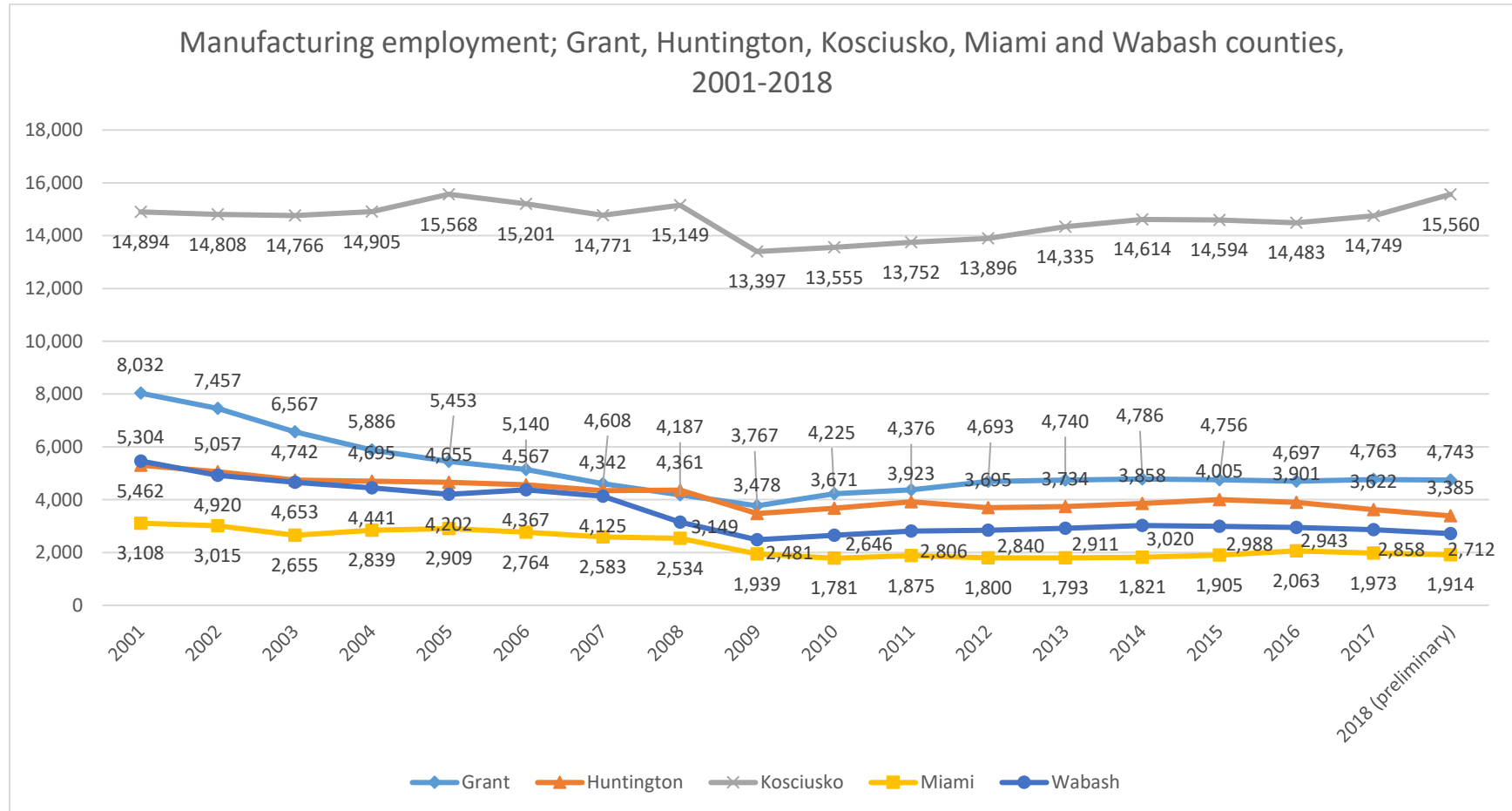
²³ Baby Boomers are considered people born from 1946 to 1964, meaning the oldest Boomers turn 73 in 2019.

²⁴ M. Kinghorn, “Indiana labor force projections: Slowdown on the horizon,” INcontext, Vol. 19, No. 5 (Sept-Oct 2018). <http://www.incontext.indiana.edu/2018/sept-oct/article1.asp> (visited May 21, 2019).

of Employment and Wages (QCEW) data. CRI selected Grant, Huntington, Kosciusko and Miami counties in addition to Wabash County, based on commuting patterns, for comparison purposes.

Recognizing the local and regional importance of manufacturing employment, CRI looked at manufacturing employment from 2001 to 2018 for these five counties in Chart 28.

CHART 28: MANUFACTURING EMPLOYMENT



Source: Quarterly Census of Employment and Wages (QCEW), U.S. Bureau of Labor Statistics

Manufacturing employment declined for four of these five counties since 2001. Kosciusko County was the only one to increase its manufacturing workforce. The June 2019 Georgetown University Center on Education and the Workforce report “Upskilling and Downsizing in American Manufacturing”²⁵ reported that manufacturing has shifted away from relatively low-skill production jobs to more skilled workers not working production positions.²⁶ Recognizing Kosciusko County’s orthopedic medical device industry with research and development jobs and corporate headquarters’ locations, the increase in manufacturing jobs is consistent with the Georgetown report.

Table 8 shows the percentage and numeric change in manufacturing, shown in Chart 28.

TABLE 8: PERCENTAGE, NUMERIC CHANGE IN MANUFACTURING EMPLOYMENT

County	Percentage change, 2001-2018	Numeric change, 2001-2018
Grant	-40.95%	-3289
Huntington	-36.18%	-1919
Kosciusko	4.47%	666
Miami	-38.42%	-1194
Wabash	-50.35%	-2750

Source: Change calculated by CRI, using QCEW data

Wabash County has lost more than 50 percent of its manufacturing workers since 2001. Only Grant County has lost more manufacturing jobs during that same time. Despite reports of manufacturing’s rebound in the post-2010 economic recovery, the data from Grant, Huntington, Miami and Wabash counties are not reflecting such an improvement.

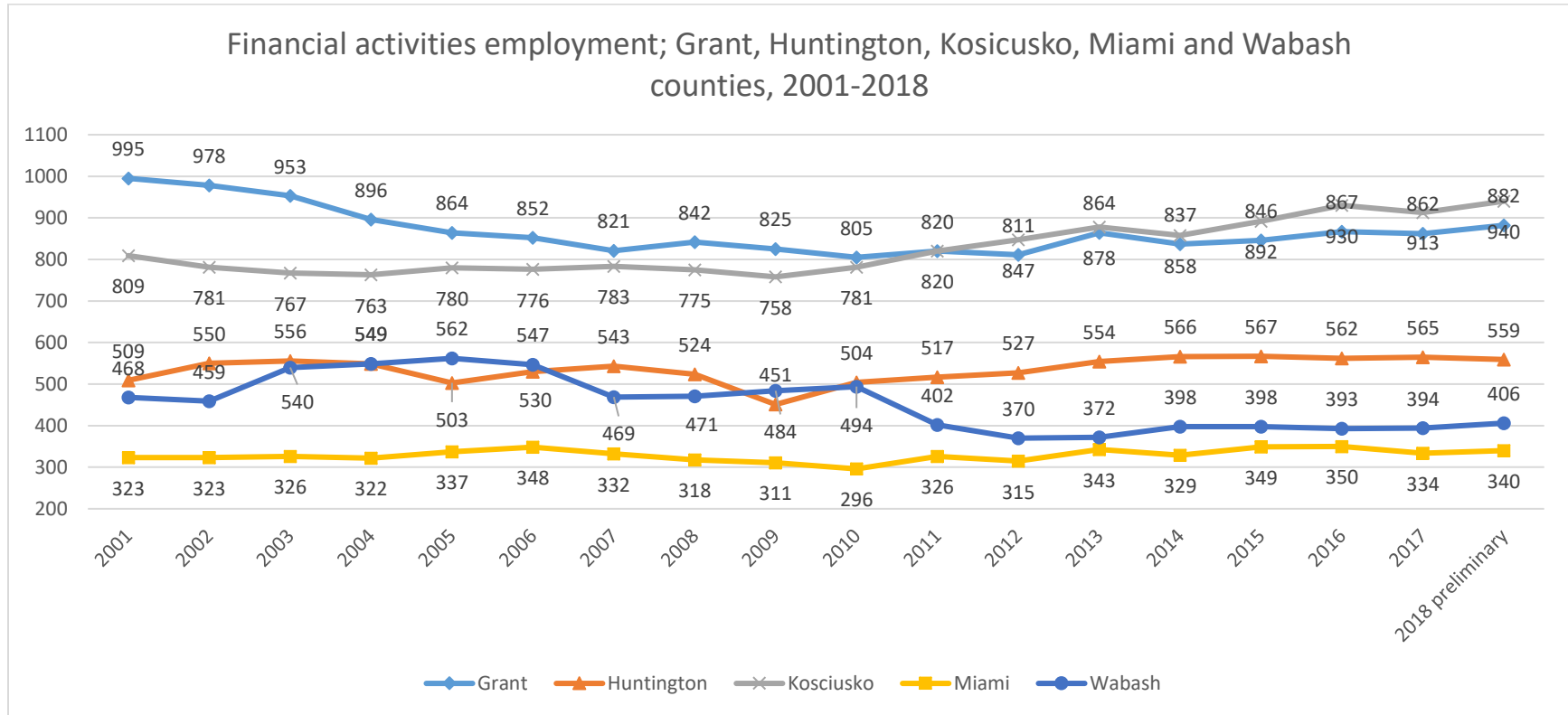
While CRI is not prepared to state a direct cause and effect between population decline and reductions in the manufacturing workforce, the two forces are probably working in tandem.

With the qualitative information for this project indicating a concern about a lack of jobs in Wabash County that require a bachelor’s degree, CRI selected two industries that employ significant numbers of people with a bachelor’s degree or higher: financial activities and professional, scientific and technical services. Using the same counties and time period as Chart 28, charts 29 and 30 looks at those two industry clusters.

²⁵ The full report is available here: https://1gyhoq479ufd3yna29x7ubjn-wpengine.netdna-ssl.com/wp-content/uploads/Manufacturing_FR.pdf. (Accessed June 16, 2019)

²⁶ The report’s analysis finds manufacturing consisted of 40 percent production workers and 60 percent in nonproduction positions in 2016.

CHART 29: FINANCIAL ACTIVITIES EMPLOYMENT



Source: QCEW, U.S. Bureau of Labor Statistics

Following the Great Recession, Kosciusko County’s financial activities’ employment crossed over Grant County for the most jobs in this five-county area. Wabash County’s employment has bounced around but declined too. Miami County’s financial services stayed relatively even. Regardless, all five of these counties have relatively small employment in financial services. Table 9 shows the percentage and numeric change from 2001 to 2018.

TABLE 9: PERCENTAGE, NUMERIC CHANGE IN FINANCIAL SERVICES EMPLOYMENT

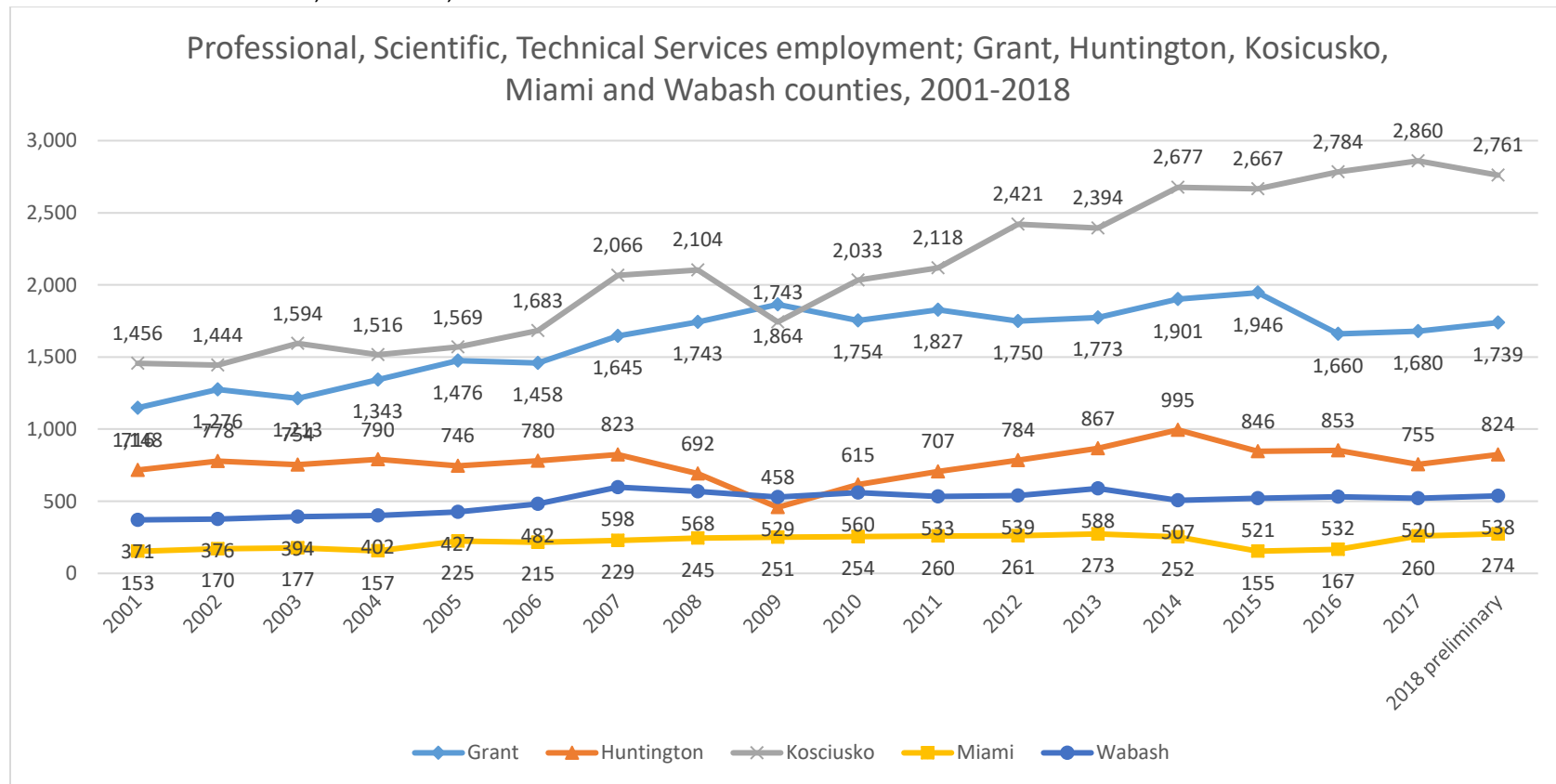
County	Percentage change, 2001-2018	Numeric change, 2001-2018
Grant	-11.36%	-113
Huntington	9.82%	50

Kosciusko	16.19%	131
Miami	5.26%	17
Wabash	-13.25%	-62

Source: Change calculated by CRI using QCEW data

Switching to professional, scientific, technical services, all five counties had increased employment from 2001 to 2018, as shown in Chart 30, but the difference in percentage and numbers among counties in Table 10 is dramatic.

CHART 30: PROFESSIONAL, SCIENTIFIC, TECHNICAL SERVICES EMPLOYMENT



Source: QCEW, U.S. Bureau of Labor Statistics

Kosciusko County started and ended as the county with the most employees in professional, scientific, technical services. Miami and Wabash counties' increases look impressive by percentage, but the numeric change is far less notable, especially when compared against Kosciusko and Grant counties.

TABLE 10: PERCENTAGE, NUMERIC CHANGE IN PROFESSIONAL, SCIENTIFIC, TECHNICAL SERVICES EMPLOYMENT

County	Percentage change, 2001-2018	Numeric change, 2001-2018
Grant	51.48%	591
Huntington	15.08%	108
Kosciusko	89.63%	1305
Miami	79.08%	121
Wabash	45.01%	167

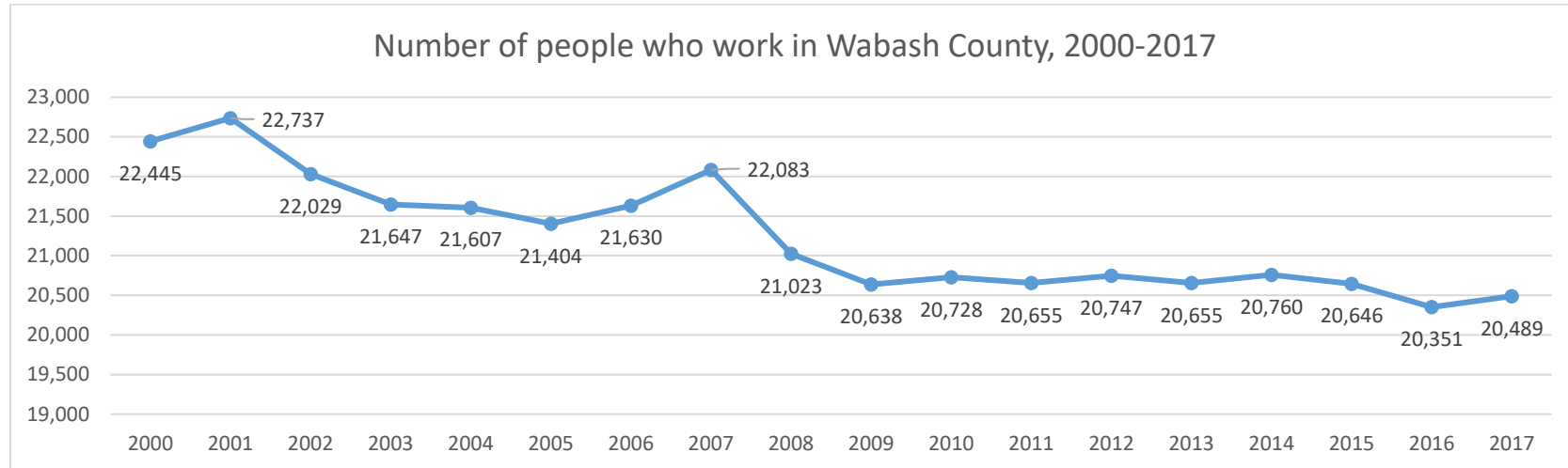
Source: Change calculated by CRI using QCEW data

If Wabash County leaders are looking to increase the number of jobs for people with bachelor's degrees or higher, these two sectors offer significant promise, especially because of the proximity to counties that are doing well in these industries.

COMMUTING PATTERNS

The Indiana Department of Workforce Development in cooperation with the Indiana Department of Revenue uses state tax return data to calculate the number of workers who commute into and out of a county for employment, known as commuting patterns. It helps counties understand if they are importing or exporting workers across county or state lines. Chart 31 shows the number of people regardless of county of residence who worked in Wabash County, the implied workforce, from 2000 to 2017.

CHART 31: PEOPLE WORKING IN WABASH COUNTY

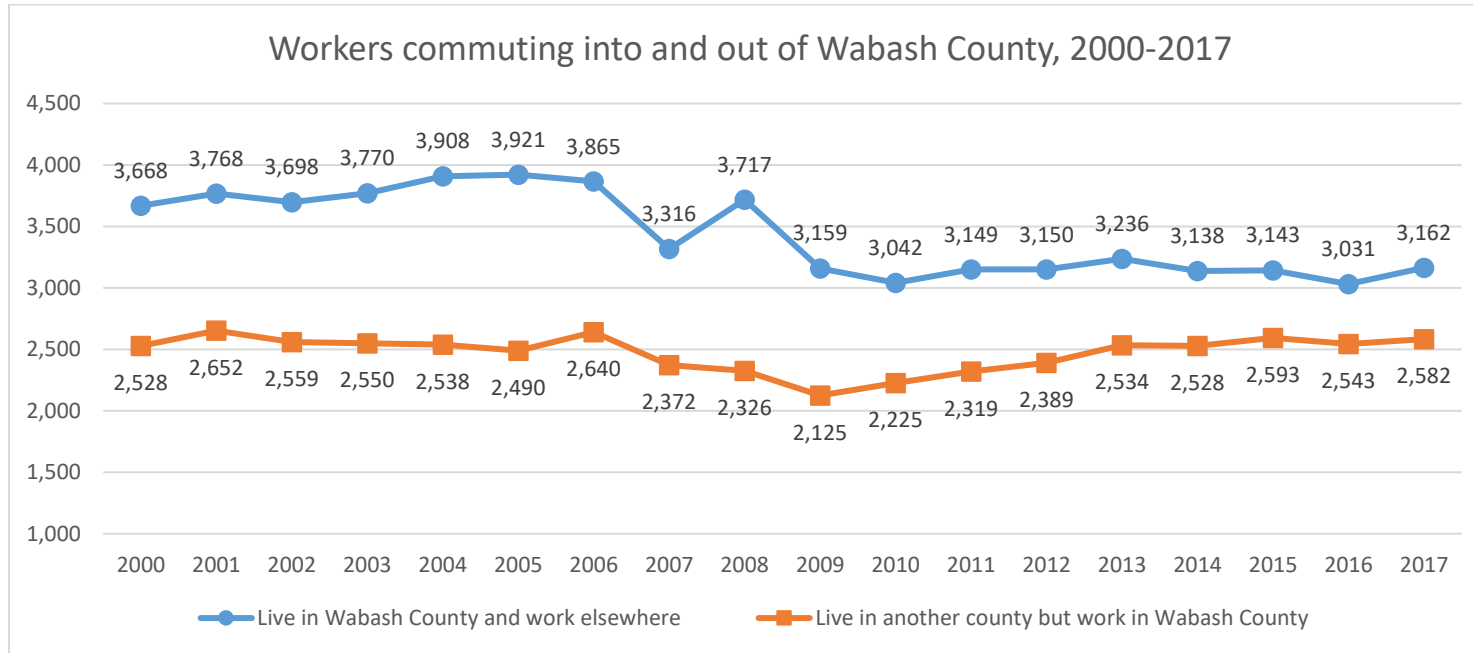


Source: STATS Indiana, Indiana Department of Workforce Development

Wabash County's implied workforce peaked in 2001. The number of Wabash County workers declined during the Great Recession but never recovered. 2016 was the lowest at 20,351 with a slight rebound in 2017.

Chart 32 shows the number of Wabash County residents who work in other counties and the number of residents from other counties who commute to Wabash County for work.

CHART 32: WORKERS COMMUTING INTO AND OUT OF WABASH COUNTY



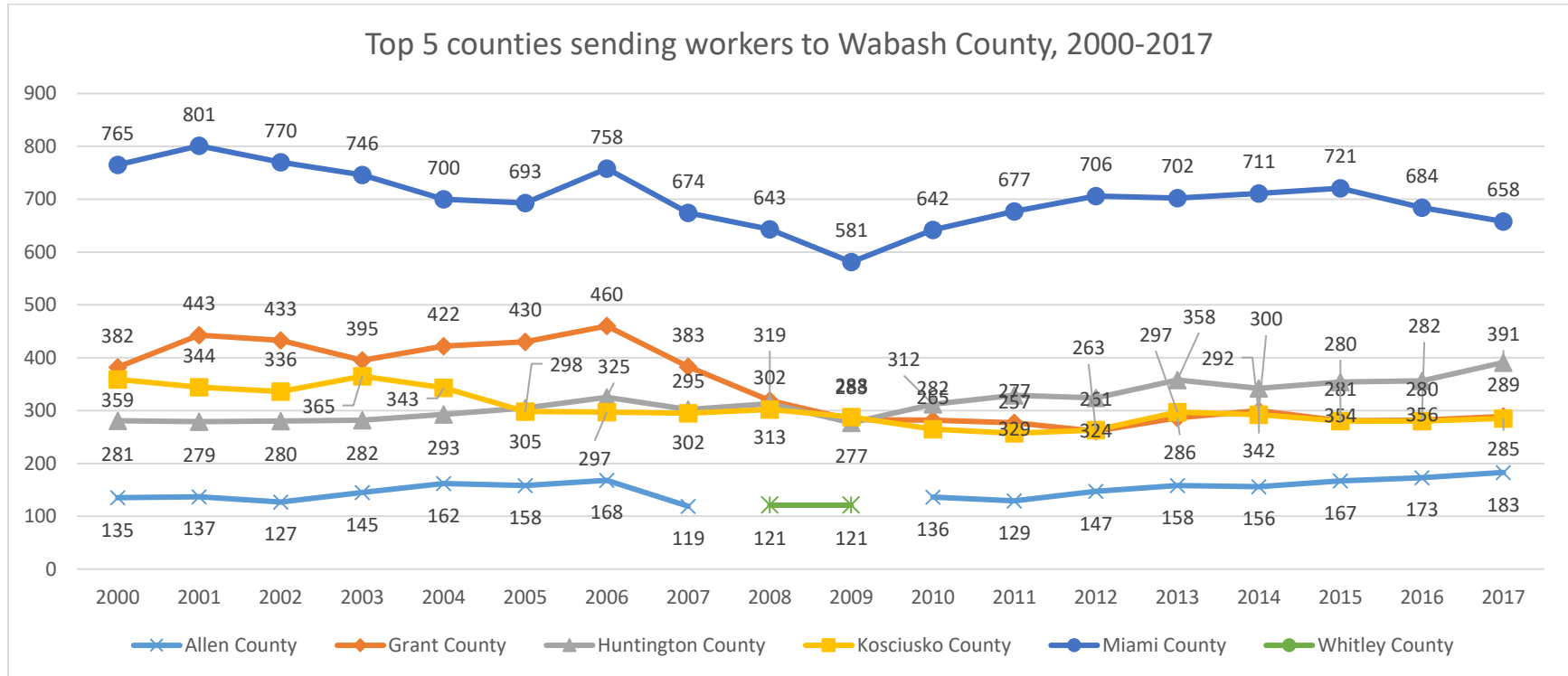
Source: STATS Indiana, Indiana Department of Workforce Development

Wabash County has a nearly two-decade trend of more people who leave the county for employment than those who enter, however the margin has narrowed over the years, largely because fewer Wabash County residents leave to work now than 15 years ago. Residents leaving for employment elsewhere peaked in 2005 and reduced 22.7 percent by 2016, the lowest year in this information.

The number of workers commuting to Wabash County has stayed relatively even around 2,500 workers. The number of workers commuting into Wabash County in the Great Recession recovery has matched the number of workers in the early 2000s.

Charts 33a and 33b show county-level commuting patterns with the top five counties that send workers to or receive workers from Wabash County.

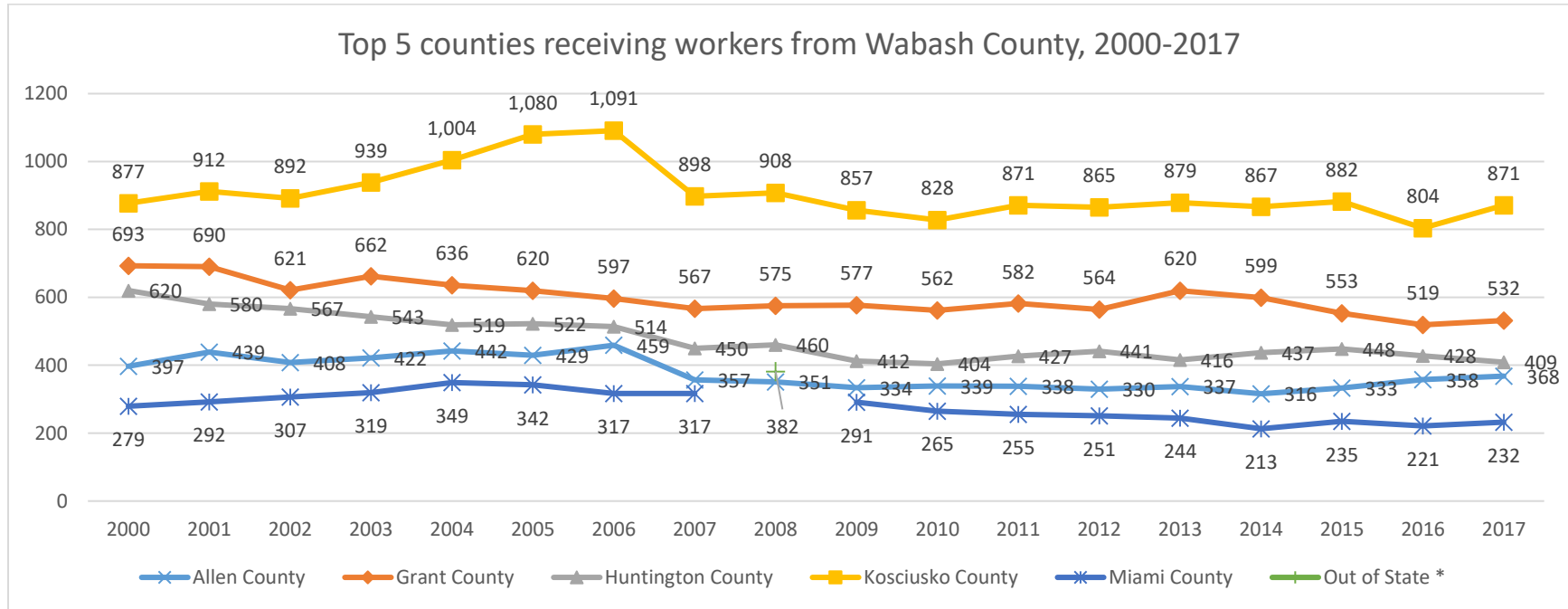
CHART 33A: TOP FIVE COUNTIES SENDING WORKERS TO WABASH COUNTY



Source: STATS Indiana, Indiana Department of Workforce Development

Miami County, Wabash County’s western neighbor, has consistently been the location with the most non-resident workers, however that has declined over time. Allen County’s share of Wabash County workers has slightly increased. The remainder started and ended at approximately the same number.

CHART 33B: TOP FIVE COUNTIES RECEIVING WORKERS FROM WABASH COUNTY



*Commuters to/from Illinois, Michigan, Kentucky, Ohio, Wisconsin, and Pennsylvania are shown separately and are not included in the "Out of State" category. The 2008 data show unusually large increases in commuting to out-of-state for all Indiana counties. The Indiana Department of Revenue reports no changes in the calculation method for these data, but STATS Indiana advises caution when conducting analysis using the 2008 out-of-state data.

Source: Indiana Department of Workforce Development

For recipient counties of Wabash County residents, commuting patterns have remained functionally consistent since 2000.

NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODE STRUCTURE

The North American Industry Classification System (NAICS) is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to U.S. businesses. It provides industry classifications that group establishments into industries based on their primary activities. Industries are classified using a hierarchical 2- to 6-digit classifications, with more digits providing greater specificity about the industry. For a complete set of NAICS definitions, visit

https://www.census.gov/eos/www/naics/2017NAICS/2017_NAICS_Manual.pdf. Readers can search specific NAICS codes at <https://www.census.gov/eos/www/naics/>.

NAICS was developed under the Office of Management and Budget, and adopted in 1997 to replace the Standard Industrial Classification (SIC) system. It was jointly created with Canada and Mexico to allow for comparability in business statistics. Emsi, the proprietary database CRI used for location quotient, industry earnings and gross regional product, uses the 2017 NAICS structure, with a handful of adjustments. Of note for this data, Emsi uses self-created aggregated codes for crop production (1110), animal production (1120) and the public sector (starting with 90) that includes public schools.²⁷ Private educational institutions will be in the Educational Services category, which for Wabash County will include Manchester University.

Below is a list of the 2-digit U.S. Census Bureau NAICS codes to provide a structural overview for the data in the location quotient, average earnings, and gross regional product sections. The first two digits of all NAICS codes indicate the industry sector.

TABLE 11: 2-DIGIT CENSUS BUREAU NAICS CODES

Sector	Name
11	Agriculture, Forestry, Fishing and Hunting
21	Mining, Quarrying, and Oil and Gas Extraction
22	Utilities
23	Construction
31-33	Manufacturing
42	Wholesale Trade
44-45	Retail Trade
48-49	Transportation and Warehousing
51	Information
52	Finance and Insurance
53	Real Estate and Rental and Leasing
54	Professional, Scientific, and Technical Services
55	Management of Companies and Enterprises
56	Administrative and Support and Waste Management and Remediation Services
61	Educational Services
62	Health Care and Social Assistance
71	Arts, Entertainment, and Recreation

²⁷ See <https://kb.economicmodeling.com/how-do-ems-naics-differ-from-standard-naics/>.

72	Accommodation and Food Services
81	Other Services (except Public Administration)
92	Public Administration

Source: U.S. Census Bureau

CRI used 4-digit NAICS codes because they provide sufficient bandwidth to capture multiple employers in similar industries but not so narrow that it becomes an overwhelming list with too many industries without a local presence.

LOCATION QUOTIENT

Location quotient (LQ) measures the concentration of an industry’s jobs in a specified geography against another geography, usually a state or the nation. For this report, LQ is compared against the United States.

Although a ratio, LQ is expressed as a single number. An LQ of 1.0 means the geography matches the nation’s concentration of industry jobs. An LQ greater than 1.0 shows a higher-than-average concentration in a location.²⁸ An LQ equal to or greater than 1.25 indicates a “traded industry” that brings new money into the economy.²⁹ For example, an LQ of 3.5 indicates that industry is 3.5 times more concentrated in that area than the United States. These concentrated industries are often considered clusters, which can create job growth, develop and support industry supply chains, and encourage relocation of new employers.

LQ reflects Wabash County’s employers, regardless of where employees live.

Table 12 lists the 4-digit NAICS codes with LQs of 1.25 or greater in 2018, ranging from a high of 30.01 to a low of 1.28. Charts 34a through 34g segment the 2018 LQ to show performance from 2001 to 2018 to provide a visualization of the time series.

TABLE 12: 4-DIGIT NAICS CODES WITH LQ 1.25 OR GREATER

NAICS	Description	2018 LQ
3325	Hardware Manufacturing	30.01
3313	Alumina and Aluminum Production and Processing	25.79
3221	Pulp, Paper, and Paperboard Mills	24.58
3329	Other Fabricated Metal Product Manufacturing	24.18

²⁸ See “Location Quotients: A Tool for Comparing Regional Industry Compositions,” Vol. 7, No. 3, InContext, Indiana University Indiana Business Research Center (March 2006). <http://www.incontext.indiana.edu/2006/march/1.asp>.

²⁹ Ibid.

3315	Foundries	23.35
3279	Other Nonmetallic Mineral Product Manufacturing	21.90
1120	Animal Production	16.55
6239	Other Residential Care Facilities	15.26
3359	Other Electrical Equipment and Component Manufacturing	13.08
4542	Vending Machine Operators	12.64
3251	Basic Chemical Manufacturing	12.37
3111	Animal Food Manufacturing	10.93
3332	Industrial Machinery Manufacturing	10.40
3379	Other Furniture Related Product Manufacturing	9.32
7113	Promoters of Performing Arts, Sports, and Similar Events	6.51
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	6.46
3363	Motor Vehicle Parts Manufacturing	5.61
5621	Waste Collection	5.44
5323	General Rental Centers	5.20
4412	Other Motor Vehicle Dealers	4.94
3231	Printing and Related Support Activities	4.90
3333	Commercial and Service Industry Machinery Manufacturing	4.74
6113	Colleges, Universities, and Professional Schools	4.24
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	3.90
6231	Nursing Care Facilities (Skilled Nursing Facilities)	3.76
1152	Support Activities for Animal Production	3.55
3121	Beverage Manufacturing	3.30
3335	Metalworking Machinery Manufacturing	3.18
2123	Nonmetallic Mineral Mining and Quarrying	3.16
4233	Lumber and Other Construction Materials Merchant Wholesalers	2.76
8122	Death Care Services	2.66
4531	Florists	2.56
2213	Water, Sewage and Other Systems	2.54
4442	Lawn and Garden Equipment and Supplies Stores	2.33
1110	Crop Production	2.32
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	2.11
4512	Book Stores and News Dealers	2.05

3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	2.05
2382	Building Equipment Contractors	2.02
4431	Electronics and Appliance Stores	1.97
4842	Specialized Freight Trucking	1.71
8131	Religious Organizations	1.70
1151	Support Activities for Crop Production	1.69
3328	Coating, Engraving, Heat Treating, and Allied Activities	1.64
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	1.55
4821	Rail Transportation	1.55
4239	Miscellaneous Durable Goods Merchant Wholesalers	1.55
3241	Petroleum and Coal Products Manufacturing	1.53
5221	Depository Credit Intermediation	1.52
4543	Direct Selling Establishments	1.49
4533	Used Merchandise Stores	1.48
4413	Automotive Parts, Accessories, and Tire Stores	1.35
4453	Beer, Wine, and Liquor Stores	1.34
7139	Other Amusement and Recreation Industries	1.33
9036	Education and Hospitals (Local Government)	1.28

Source: Emsi 2019.2

Evaluating Table 12 by the associated 2-digit NAICS codes, the following industries are represented with the number of 4-digit industries listed in parentheses:

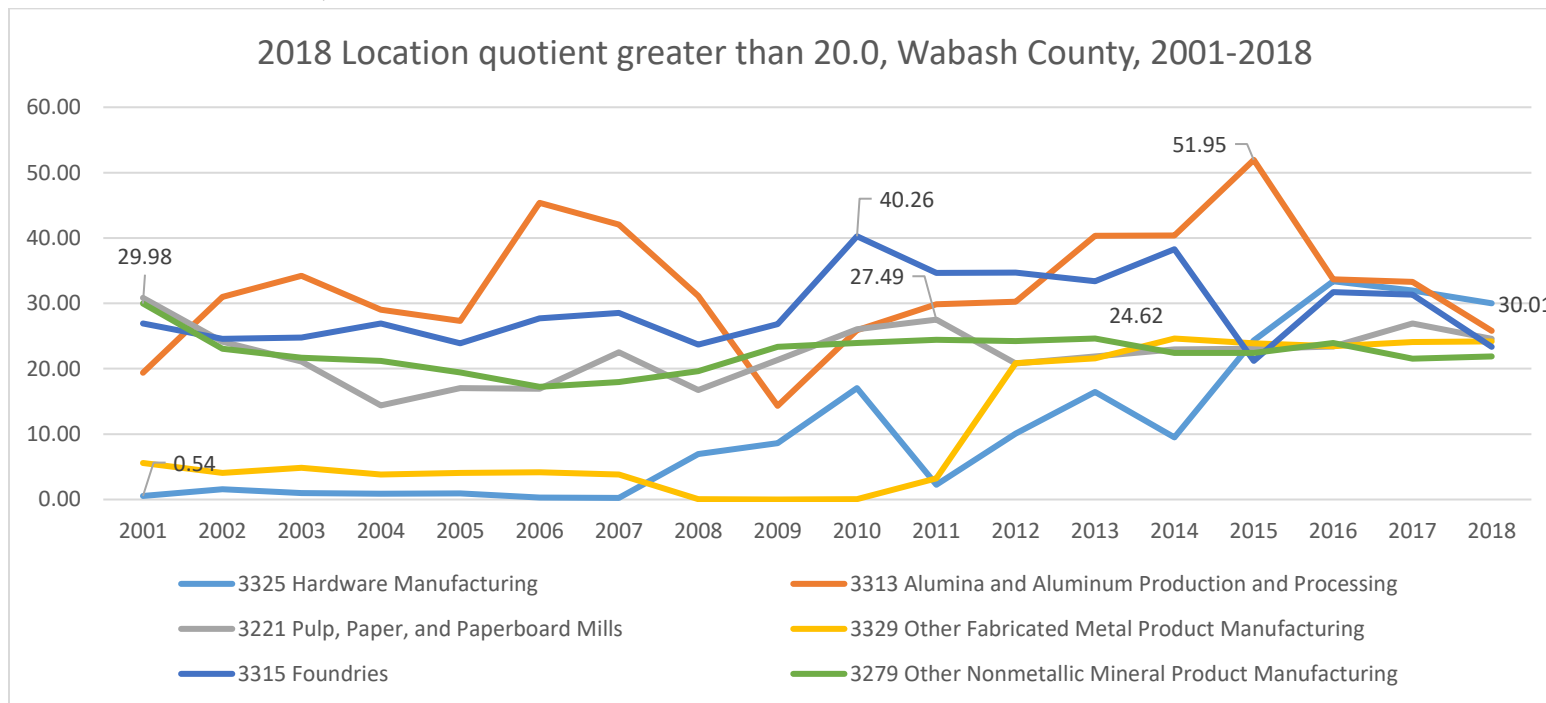
- Agriculture, Forestry, Fishing and Hunting (4)
- Mining, Quarrying, and Oil and Gas Extraction (1)
- Utilities (1)
- Construction (1)
- Manufacturing (19)
- Wholesale Trade (4)
- Retail Trade (11)
- Transportation and Warehousing (2)
- Finance and Insurance (1)
- Real Estate and Rental and Leasing (1)

- Administrative and Support and Waste Management and Remediation Services (1)
- Educational Services (1)
- Health Care and Social Assistance (3)
- Arts, Entertainment, and Recreation (2)
- Other Services (except Public Administration) (2)
- Public Administration (1)

Manufacturing constitutes more than a third of traded industries at 19 out of the 55 industries. The second largest sector was Retail Trade with 11 industries. Agriculture and Wholesale Trade tied for third place with four traded industries each.

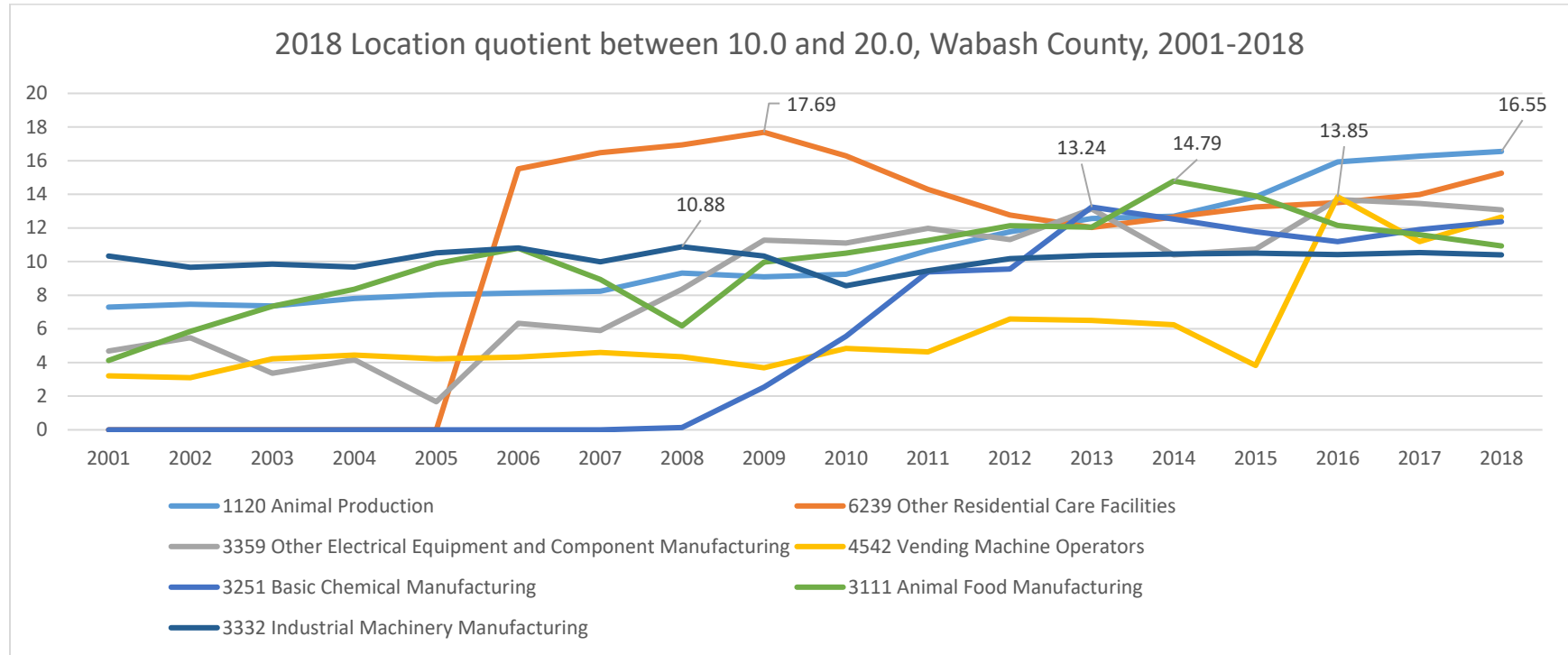
Using the industries with 2018 LQs greater than 1.25, the next series of charts show historical performance of these industries from 2001 to 2018. CRI separated the industries by LQ total to be able to better show the associated time series.

CHART 34A: LOCATION QUOTIENT GREATER THAN 20.0



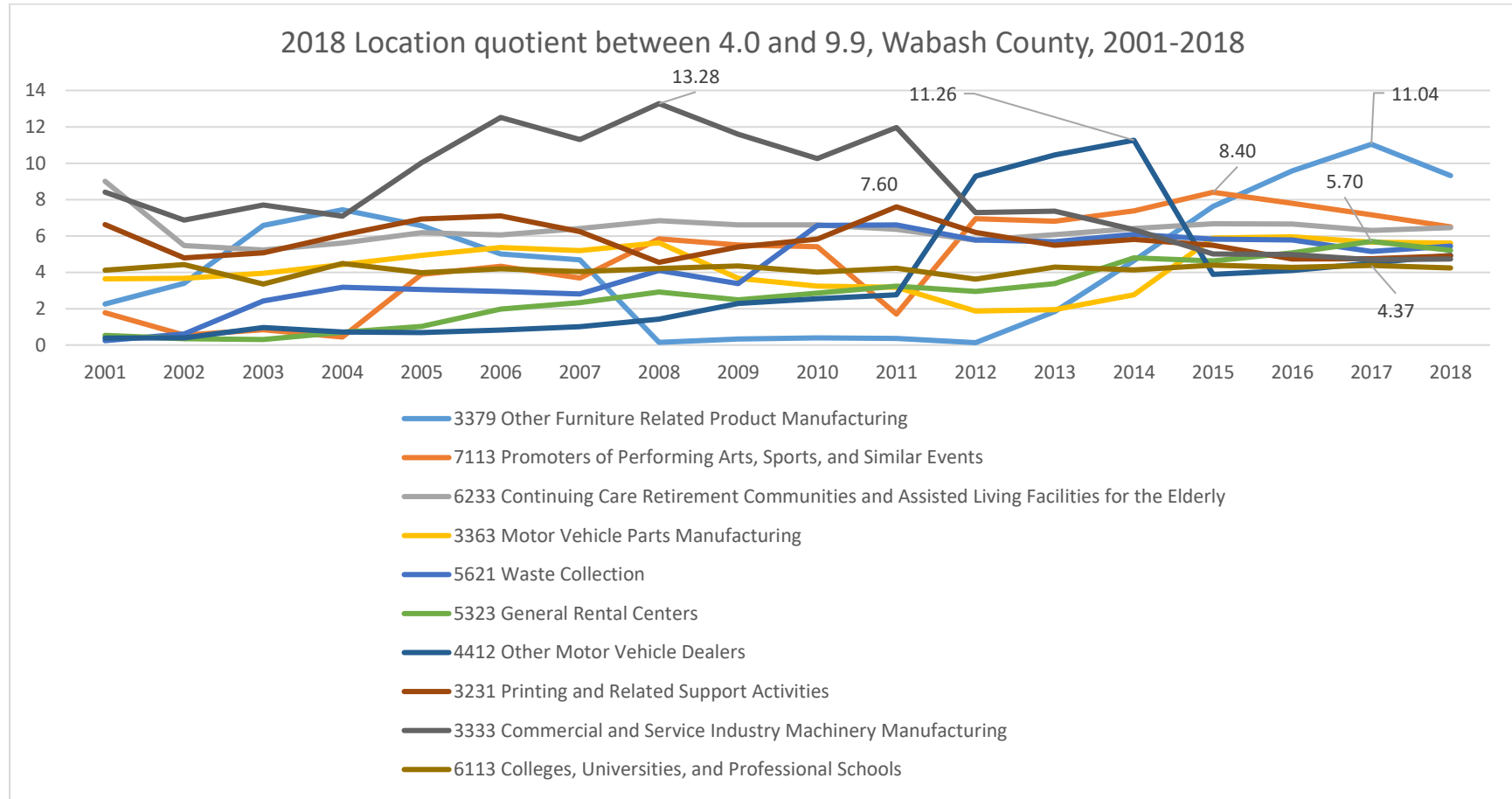
Source: Emsi 2019.2

CHART 34B: LOCATION QUOTIENT BETWEEN 10.0 AND 20.0



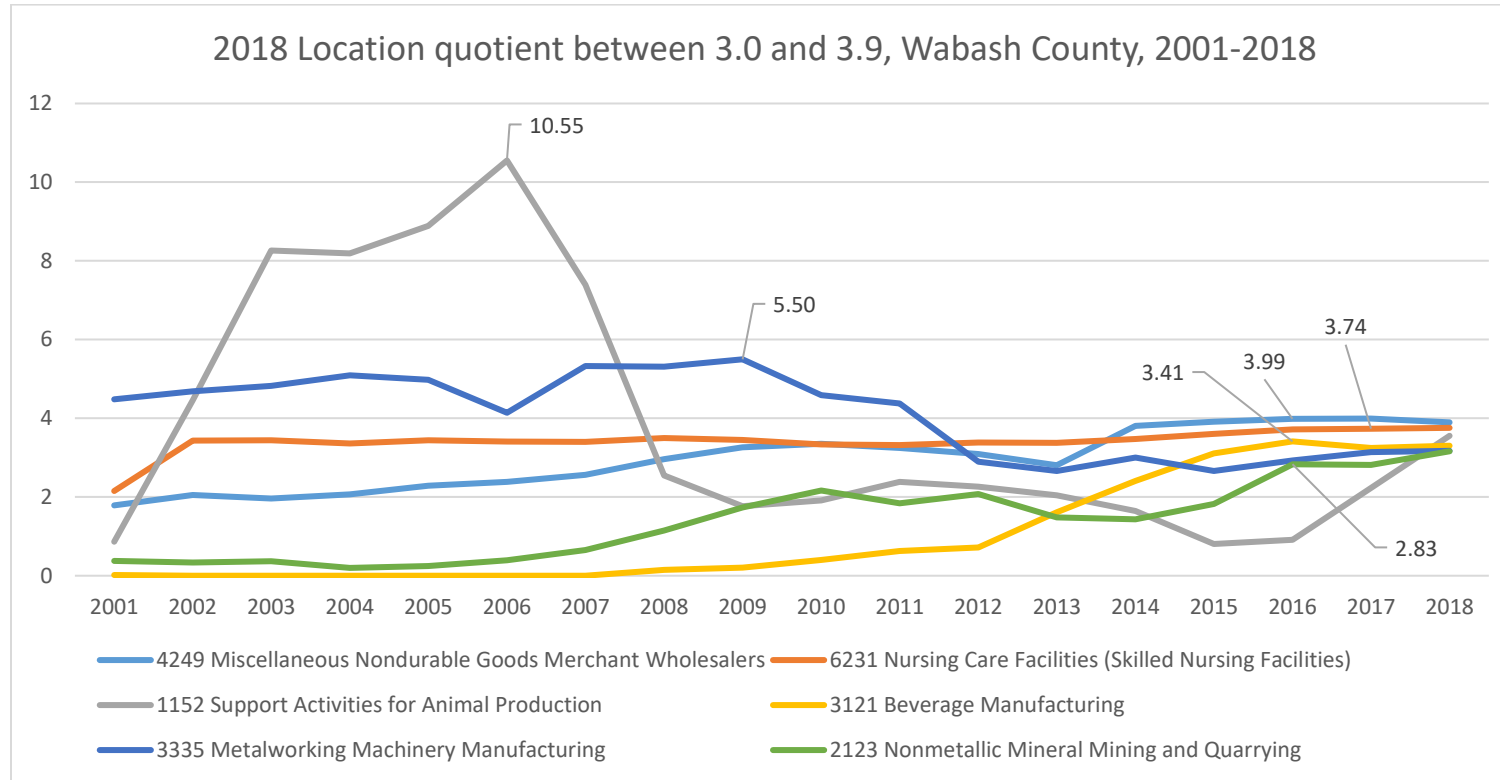
Source: Emsi 2019.2

CHART 34C: LOCATION QUOTIENT BETWEEN 4.0 AND 9.9



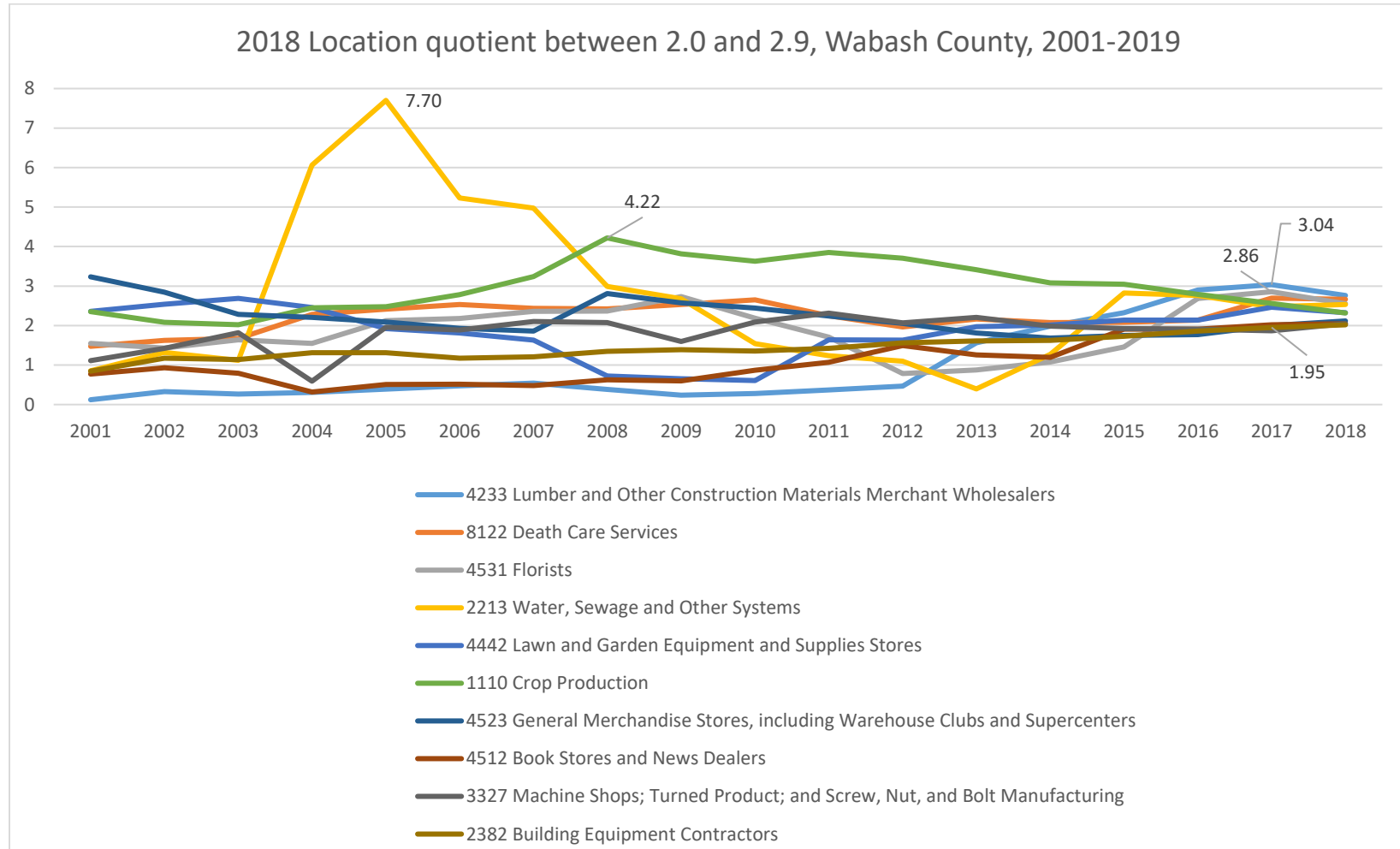
Source: Emsi 2019.2

CHART 34D: LOCATION QUOTIENT BETWEEN 3.0 AND 3.9



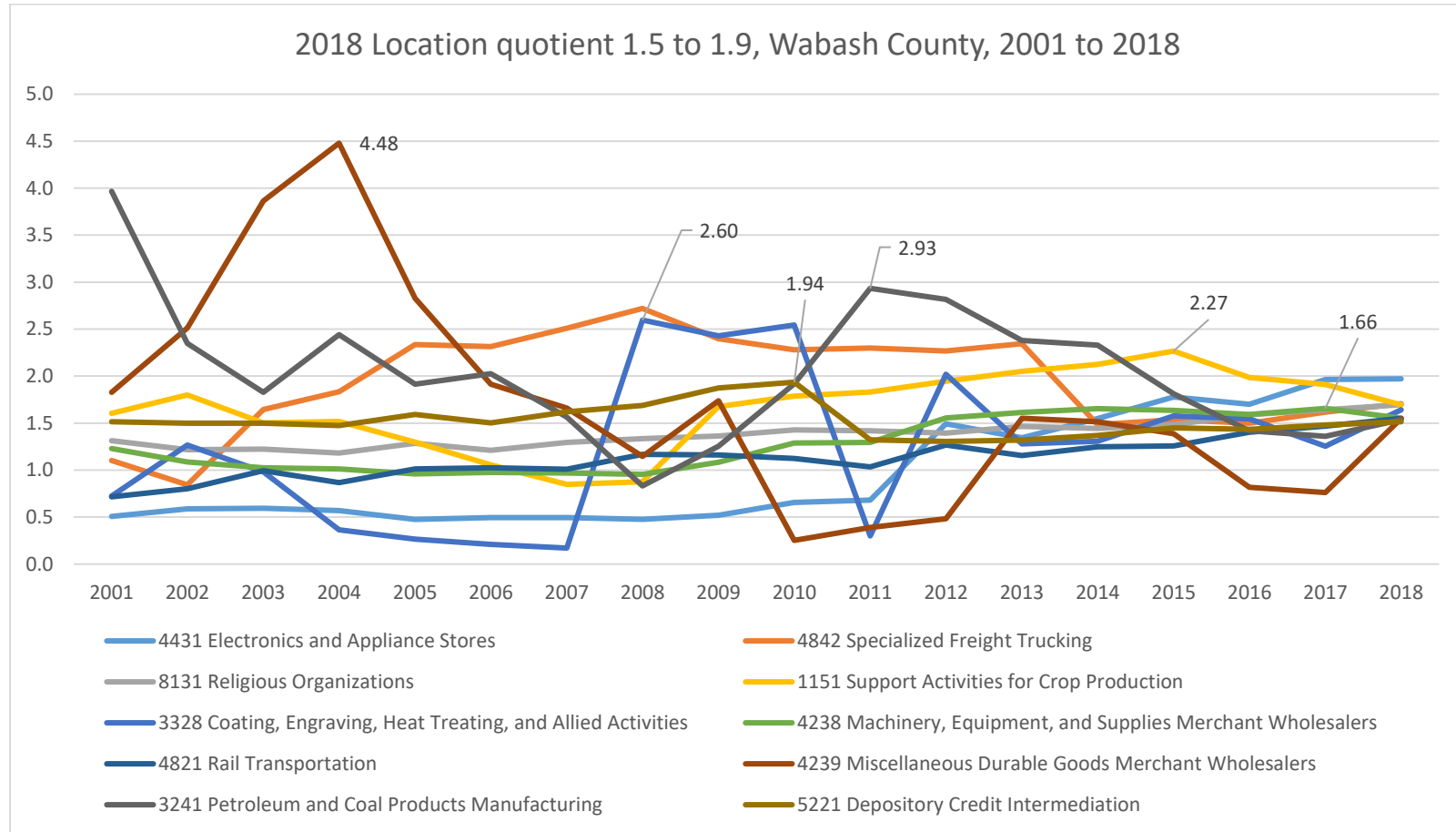
Source: Emsi 2019.2

CHART 34E: LOCATION QUOTIENT BETWEEN 2.0 AND 2.9



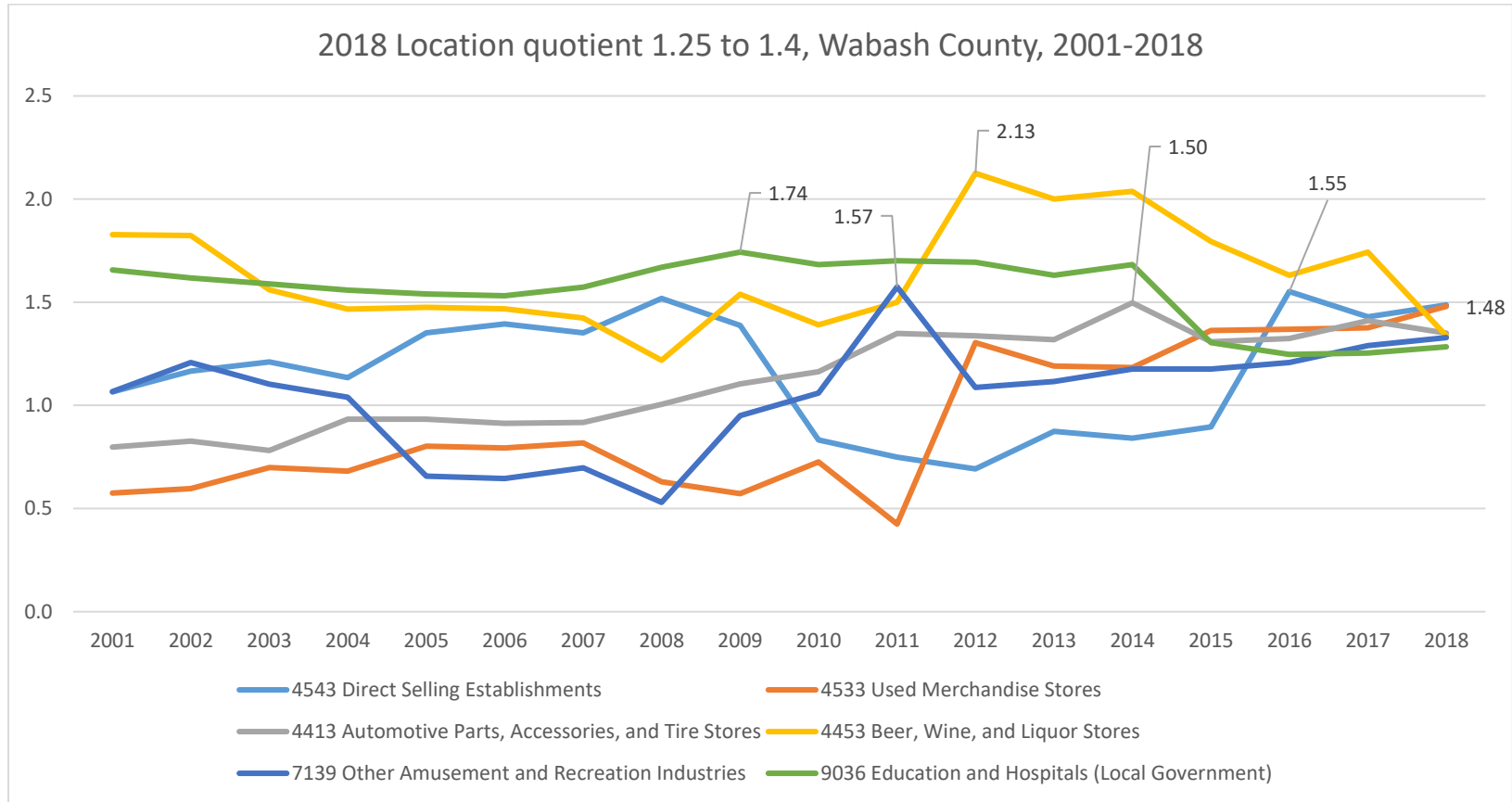
Source: Emsi 2019.2

CHART 34F: LOCATION QUOTIENT BETWEEN 1.5 AND 1.9



Source: Emsi 2019.2

CHART 34G: LOCATION QUOTIENT BETWEEN 1.25 AND 1.4



Source: Emsi 2019.2

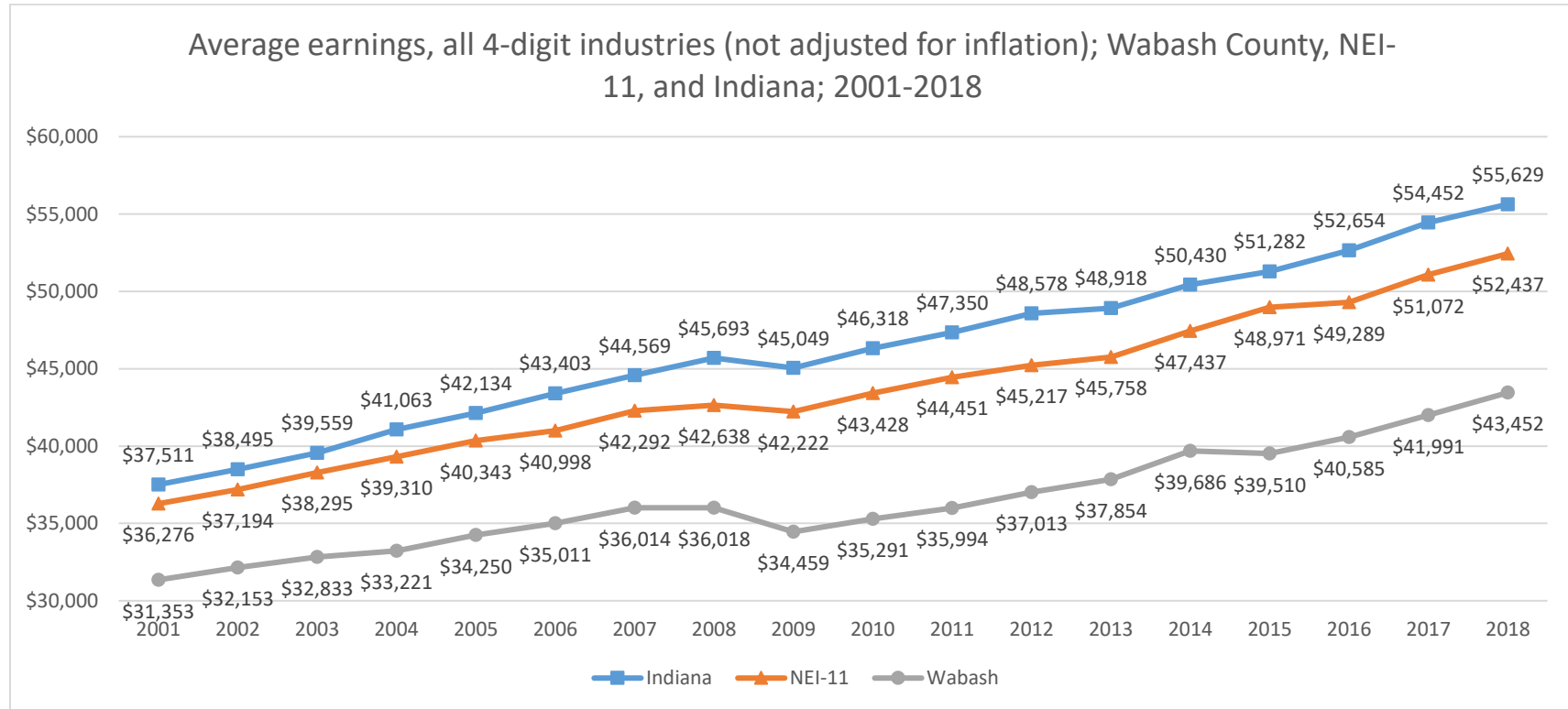
These time series charts show how location quotients varied over time for 4-digit industries. Industries' employment is not static. Some industries have emerged out of nearly nothing – Beverage Manufacturing (3121) or Basic Chemical Manufacturing (3251) – in this 17-year time period. Because a 1.25-or-higher LQ in 2018 was required to be included in this list, industries with significant employment in earlier years that have since left Wabash County are not reflected on these charts. That historical information is available in the full data set CRI shared with the Community Foundation.

AVERAGE EARNINGS

Earnings reflect the total average employee earnings of wages, salaries, supplements (additional employee benefits like retirement plan payments on behalf of the employee), and proprietor income. This information reflects Wabash County’s workers, regardless of county of residence. CRI used Indiana and NEI-11 as the comparison data in this section.

Chart 35 is the average earnings of all 4-digit NAICS codes from 2001 to 2018 for Indiana, NEI-11, and Wabash County.

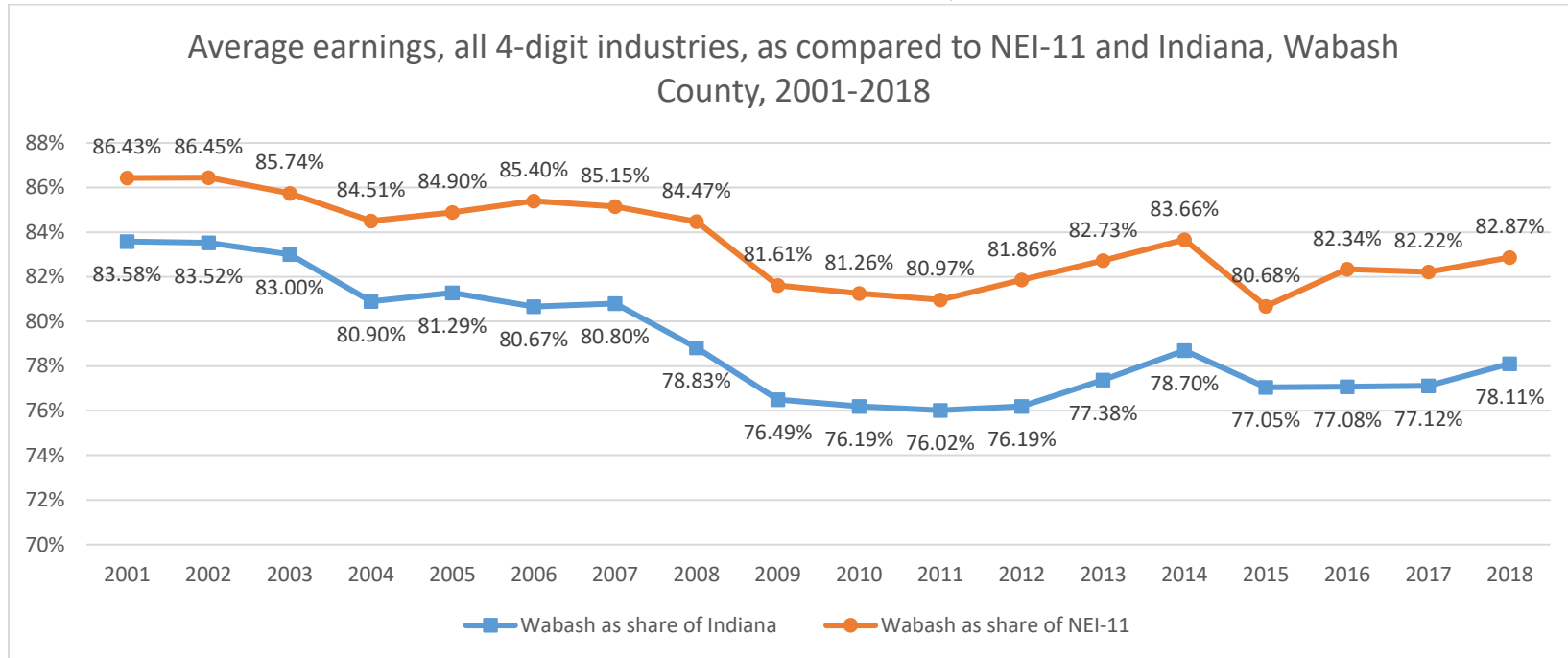
CHART 35: AVERAGE EARNINGS



Source: Emsi 2019.2

Wabash County has consistently had average earnings below both the state and the region for 17 years, however the spread between local, regional and state earnings is growing larger, as shown in Chart 36.

CHART 36: COMPARISON OF WABASH COUNTY AVERAGE EARNINGS TO NEI-11, INDIANA



Source: Emsi 2019.2

Looking at Wabash County’s average earnings against NEI-11 and Indiana, local pay has stagnated against the state and region during this time period. Wabash County’s best performance was in 2001 and was markedly lower during the Great Recession. There has been some improvement since that time, but it is still below the highs of early 2000s.

AVERAGE EARNINGS BY 4-DIGIT INDUSTRIES

If Wabash County leaders would like to improve average earnings, evaluating industry-level earnings is useful. Table 13 lists the 43 4-digit industries with 2018 average earnings above Wabash County’s \$43,452 4-digit average threshold, sorted highest to lowest.

TABLE 13: WABASH COUNTY 4-DIGIT INDUSTRIES WITH 2018 EARNINGS ABOVE COUNTY AVERAGE

NAICS Code	Description	Average earnings
5231	Securities and Commodity Contracts Intermediation and Brokerage	\$171,848

3241	Petroleum and Coal Products Manufacturing	\$163,539
2211	Electric Power Generation, Transmission and Distribution	\$119,936
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	\$107,779
3359	Other Electrical Equipment and Component Manufacturing	\$101,583
6211	Offices of Physicians	\$96,179
4821	Rail Transportation	\$86,754
3222	Converted Paper Product Manufacturing	\$84,967
3344	Semiconductor and Other Electronic Component Manufacturing	\$82,471
2213	Water, Sewage and Other Systems	\$77,942
3331	Agriculture, Construction, and Mining Machinery Manufacturing	\$72,522
4244	Grocery and Related Product Merchant Wholesalers	\$72,191
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$71,299
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$70,992
3111	Animal Food Manufacturing	\$70,854
4233	Lumber and Other Construction Materials Merchant Wholesalers	\$70,163
3329	Other Fabricated Metal Product Manufacturing	\$67,574
9011	Federal Government, Civilian	\$67,242
2373	Highway, Street, and Bridge Construction	\$66,696
5415	Computer Systems Design and Related Services	\$63,539
3221	Pulp, Paper, and Paperboard Mills	\$62,932
2123	Nonmetallic Mineral Mining and Quarrying	\$62,806
5621	Waste Collection	\$62,709
3332	Industrial Machinery Manufacturing	\$62,572
9029	State Government, Excluding Education and Hospitals	\$62,020
3333	Commercial and Service Industry Machinery Manufacturing	\$61,908
2382	Building Equipment Contractors	\$61,091
3363	Motor Vehicle Parts Manufacturing	\$60,492
5221	Depository Credit Intermediation	\$60,248
3313	Alumina and Aluminum Production and Processing	\$59,324
2362	Nonresidential Building Construction	\$58,182

3391	Medical Equipment and Supplies Manufacturing	\$56,894
5411	Legal Services	\$55,349
4841	General Freight Trucking	\$55,268
5242	Agencies, Brokerages, and Other Insurance Related Activities	\$54,626
3279	Other Nonmetallic Mineral Product Manufacturing	\$53,051
3251	Basic Chemical Manufacturing	\$51,083
4239	Miscellaneous Durable Goods Merchant Wholesalers	\$50,916
5173	Wired and Wireless Telecommunications Carriers	\$50,579
6221	General Medical and Surgical Hospitals	\$49,951
6212	Offices of Dentists	\$47,488
3323	Architectural and Structural Metals Manufacturing	\$47,251
4842	Specialized Freight Trucking	\$46,684

Source: Emsi 2019.2

The highest-earnings industries represent the following sectors:

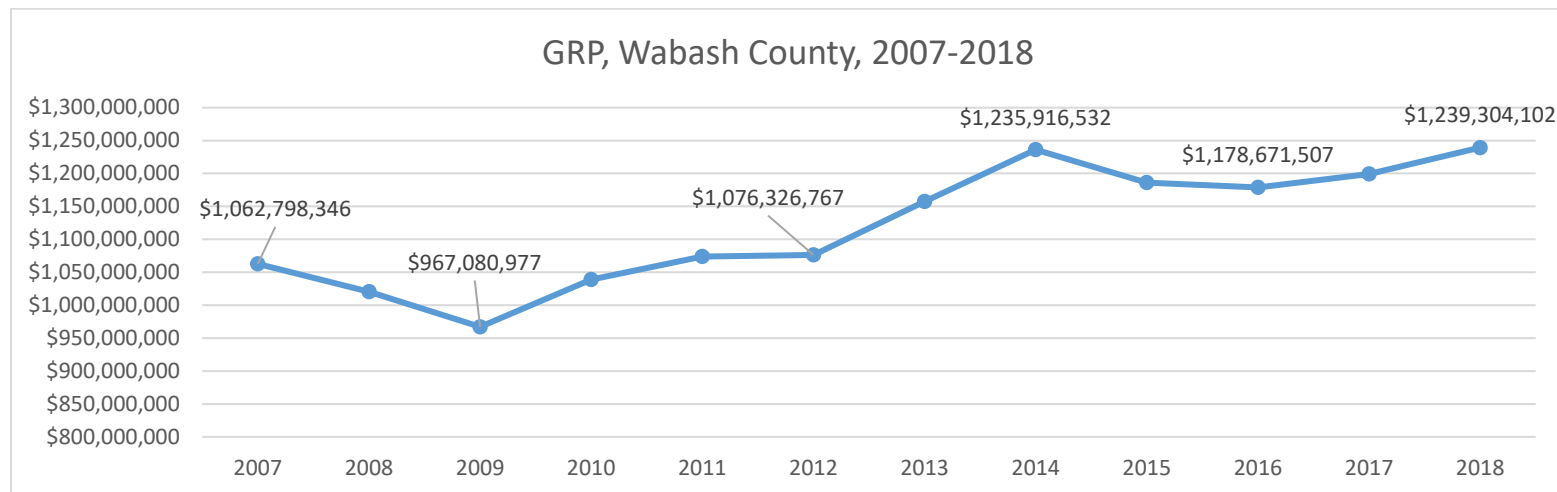
- Mining, quarrying, and oil and gas extraction (1)
- Utilities (2)
- Construction (3)
- Manufacturing (17)
- Wholesale trade (5)
- Transportation and warehousing (3)
- Information (1)
- Finance and insurance (3)
- Professional, scientific, and technical services (2)
- Administrative and support and waste management and remediation services (1)
- Health care and social assistance (3)
- Government, public sector (2)

GROSS REGIONAL PRODUCT

The proprietary database Emsi calculates gross regional product (GRP) for a region, using the final market value of all goods and services produced in that region. Emsi’s data is based primarily on data from the Bureau of Economic Analysis (BEA) and the Quarterly Census of Employment and Wages (QCEW) from the Bureau of Labor Statistics (BLS).

Chart 37 shows Wabash County’s GRP from 2007 to 2018.

CHART 37: WABASH COUNTY GRP



Source: Emsi 2019.2

Wabash County’s 2018 GRP was \$1.24 billion, which is the highest in the 11-year period. Local GRP declined during the Great Recession and then climbed from 2010 to 2014. It slid down slightly in 2015 and 2016. The past two years show a slight increase.

In this report, CRI lists the 4-digit NAICS codes with \$10 million or greater in 2018 GRP to provide sufficient GDP data for Wabash County. CRI provided the Community Foundation with the full GDP data in a separate data file. This information reflects Wabash County’s employers, regardless of where employees live.

TABLE 14: 2018 4-DIGIT WABASH COUNTY INDUSTRIES WITH A GRP GREATER THAN \$10 MILLION

NAICS code	Description	2018 GRP
3329	Other Fabricated Metal Product Manufacturing	\$67,931,808

1120	Animal Production	\$54,013,549
3251	Basic Chemical Manufacturing	\$52,351,008
3221	Pulp, Paper, and Paperboard Mills	\$43,536,701
9036	Education and Hospitals (Local Government)	\$37,503,079
2382	Building Equipment Contractors	\$35,524,762
5221	Depository Credit Intermediation	\$34,045,777
3359	Other Electrical Equipment and Component Manufacturing	\$33,580,792
3325	Hardware Manufacturing	\$31,593,778
6113	Colleges, Universities, and Professional Schools	\$28,915,234
3363	Motor Vehicle Parts Manufacturing	\$23,628,377
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$21,522,939
9039	Local Government, Excluding Education and Hospitals	\$20,133,029
3315	Foundries	\$20,079,998
3279	Other Nonmetallic Mineral Product Manufacturing	\$19,606,446
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	\$19,556,069
6231	Nursing Care Facilities (Skilled Nursing Facilities)	\$19,141,877
3241	Petroleum and Coal Products Manufacturing	\$19,051,763
2211	Electric Power Generation, Transmission and Distribution	\$18,816,838
7225	Restaurants and Other Eating Places	\$17,540,310
5311	Lessors of Real Estate	\$15,856,579
3313	Alumina and Aluminum Production and Processing	\$15,842,834
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	\$14,607,136
6221	General Medical and Surgical Hospitals	\$13,487,523
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$12,516,688
5621	Waste Collection	\$12,165,918
4247	Petroleum and Petroleum Products Merchant Wholesalers	\$11,342,465
5242	Agencies, Brokerages, and Other Insurance Related Activities	\$10,309,472
5313	Activities Related to Real Estate	\$10,167,978
3329	Other Fabricated Metal Product Manufacturing	\$67,931,808
1120	Animal Production	\$54,013,549

3251	Basic Chemical Manufacturing	\$52,351,008
3221	Pulp, Paper, and Paperboard Mills	\$43,536,701
9036	Education and Hospitals (Local Government)	\$37,503,079
2382	Building Equipment Contractors	\$35,524,762
5221	Depository Credit Intermediation	\$34,045,777
3359	Other Electrical Equipment and Component Manufacturing	\$33,580,792
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6113	Colleges, Universities, and Professional Schools	\$28,915,234
3363	Motor Vehicle Parts Manufacturing	\$23,628,377
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$21,522,939
9039	Local Government, Excluding Education and Hospitals	\$20,133,029
3315	Foundries	\$20,079,998
3279	Other Nonmetallic Mineral Product Manufacturing	\$19,606,446
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	\$19,556,069
6231	Nursing Care Facilities (Skilled Nursing Facilities)	\$19,141,877
3241	Petroleum and Coal Products Manufacturing	\$19,051,763
2211	Electric Power Generation, Transmission and Distribution	\$18,816,838
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5311	Lessors of Real Estate	\$15,856,579
3313	Alumina and Aluminum Production and Processing	\$15,842,834
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	\$14,607,136
6221	General Medical and Surgical Hospitals	\$13,487,523
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$12,516,688
5621	Waste Collection	\$12,165,918
4247	Petroleum and Petroleum Products Merchant Wholesalers	\$11,342,465
5242	Agencies, Brokerages, and Other Insurance Related Activities	\$10,309,472
5313	Activities Related to Real Estate	\$10,167,978

Source: Emsi 2019.2

The industries with \$10 million or greater in GRP represent the following sectors:

- Agriculture, forestry, fishing and hunting (1)
- Utilities (1)
- Construction (1)
- Manufacturing (9)
- Wholesale trade (3)
- Retail trade (1)
- Finance and insurance (2)
- Real estate and rental and leasing (2)
- Administrative and support and waste management and remediation services (1)
- Educational services (1)
- Health care and social assistance (3)
- Accommodation and food services (1)
- Government, public sector (2)

Like LQ and earnings, manufacturing remains significant in GRP performance. These nine industries represented 20.92 percent of Wabash County’s 2018 GRP. In comparison, the three healthcare industries made up 4.21 percent.

WABASH COUNTY’S SHARE OF NEI-11 GRP

Comparing Wabash County’s total GRP, per the Emsi data, to the total for NEI-11, Wabash County’s output constitutes 2.84 percent of the regional GRP.

CRI identified the 4-digit NAICS codes where Wabash County outperforms the 2.84 percent mark, as shown in Table 15.

TABLE 15: WABASH COUNTY 4-DIGIT NAICS INDUSTRIES OVERREPRESENTED IN NEI-11 GRP

NAICS Code	Description	NEI-11 GRP	Wabash GRP	Wabash share of NEI-11 GRP
3221	Pulp, Paper, and Paperboard Mills	\$87,395,876	\$43,536,701	49.82%
6239	Other Residential Care Facilities	\$21,038,837	\$8,828,767	41.96%
3325	Hardware Manufacturing	\$75,706,291	\$31,593,778	41.73%
3241	Petroleum and Coal Products Manufacturing	\$48,867,478	\$19,051,763	38.99%
7113	Promoters of Performing Arts, Sports, and Similar Events	\$13,588,987	\$5,130,484	37.75%
3251	Basic Chemical Manufacturing	\$140,925,119	\$52,351,008	37.15%

3329	Other Fabricated Metal Product Manufacturing	\$205,886,774	\$67,931,808	32.99%
3332	Industrial Machinery Manufacturing	\$30,100,050	\$9,040,319	30.03%
3111	Animal Food Manufacturing	\$33,772,833	\$9,562,246	28.31%
3121	Beverage Manufacturing	\$27,426,757	\$7,579,403	27.64%
3359	Other Electrical Equipment and Component Manufacturing	\$123,113,562	\$33,580,792	27.28%
4852	Interurban and Rural Bus Transportation	\$121,090	\$31,037	25.63%
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	\$104,477,535	\$19,556,069	18.72%
3279	Other Nonmetallic Mineral Product Manufacturing	\$115,914,967	\$19,606,446	16.91%
1120	Animal Production	\$373,664,540	\$54,013,549	14.46%
1151	Support Activities for Crop Production	\$32,663,316	\$4,669,485	14.30%
5323	General Rental Centers	\$6,715,221	\$949,730	14.14%
4233	Lumber and Other Construction Materials Merchant Wholesalers	\$56,840,964	\$7,821,046	13.76%
3315	Foundries	\$149,015,316	\$20,079,998	13.48%
3313	Alumina and Aluminum Production and Processing	\$125,516,916	\$15,842,834	12.62%
6113	Colleges, Universities, and Professional Schools	\$231,513,064	\$28,915,234	12.49%
4412	Other Motor Vehicle Dealers	\$46,574,923	\$5,756,447	12.36%
2213	Water, Sewage and Other Systems	\$15,378,634	\$1,866,234	12.14%
5621	Waste Collection	\$102,508,371	\$12,165,918	11.87%
7213	Rooming and Boarding Houses, Dormitories, and Workers' Camps	\$3,106,301	\$367,431	11.83%
3379	Other Furniture Related Product Manufacturing	\$18,684,161	\$2,161,381	11.57%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$214,192,572	\$21,522,939	10.05%
4431	Electronics and Appliance Stores	\$58,099,662	\$5,695,283	9.80%
3333	Commercial and Service Industry Machinery Manufacturing	\$37,503,997	\$3,504,247	9.34%
7223	Special Food Services	\$39,335,865	\$3,275,240	8.33%
7121	Museums, Historical Sites, and Similar Institutions	\$15,224,726	\$1,264,352	8.30%
2123	Nonmetallic Mineral Mining and Quarrying	\$47,729,350	\$3,926,917	8.23%
2131	Support Activities for Mining	\$952,139	\$78,166	8.21%
4512	Book Stores and News Dealers	\$6,172,703	\$499,582	8.09%
8141	Private Households	\$9,351,382	\$701,047	7.50%

4542	Vending Machine Operators	\$37,130,682	\$2,692,014	7.25%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	\$266,698,646	\$19,141,877	7.18%
4531	Florists	\$7,178,889	\$506,523	7.06%
3344	Semiconductor and Other Electronic Component Manufacturing	\$47,233,325	\$3,292,531	6.97%
7211	Traveler Accommodation	\$87,382,090	\$5,974,089	6.84%
1152	Support Activities for Animal Production	\$15,099,061	\$948,497	6.28%
8122	Death Care Services	\$25,983,431	\$1,615,331	6.22%
2382	Building Equipment Contractors	\$589,657,770	\$35,524,762	6.02%
5221	Depository Credit Intermediation	\$600,752,484	\$34,045,777	5.67%
8132	Grantmaking and Giving Services	\$11,919,255	\$662,270	5.56%
9029	State Government, Excluding Education and Hospitals	\$136,415,434	\$7,334,855	5.38%
4241	Paper and Paper Product Merchant Wholesalers	\$21,182,309	\$1,055,459	4.98%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	\$12,464,164	\$620,306	4.98%
5615	Travel Arrangement and Reservation Services	\$7,165,184	\$353,531	4.93%
7131	Amusement Parks and Arcades	\$1,830,362	\$88,348	4.83%
5419	Other Professional, Scientific, and Technical Services	\$134,253,705	\$6,247,245	4.65%
4442	Lawn and Garden Equipment and Supplies Stores	\$32,845,947	\$1,516,357	4.62%
6114	Business Schools and Computer and Management Training	\$9,909,606	\$451,188	4.55%
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$277,964,554	\$12,516,688	4.50%
4543	Direct Selling Establishments	\$92,311,533	\$4,155,728	4.50%
4533	Used Merchandise Stores	\$29,093,342	\$1,302,449	4.48%
2211	Electric Power Generation, Transmission and Distribution	\$420,396,584	\$18,816,838	4.48%
3231	Printing and Related Support Activities	\$226,608,365	\$9,928,221	4.38%
4451	Grocery Stores	\$146,706,154	\$6,408,095	4.37%
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	\$338,057,252	\$14,607,136	4.32%
9036	Education and Hospitals (Local Government)	\$871,589,956	\$37,503,079	4.30%
7139	Other Amusement and Recreation Industries	\$64,972,677	\$2,744,938	4.22%
5313	Activities Related to Real Estate	\$242,138,457	\$10,167,978	4.20%
8129	Other Personal Services	\$65,404,405	\$2,728,351	4.17%

4413	Automotive Parts, Accessories, and Tire Stores	\$97,068,631	\$4,027,829	4.15%
1110	Crop Production	\$245,751,225	\$9,981,853	4.06%
8121	Personal Care Services	\$103,222,058	\$3,928,455	3.81%
	Other Vectors	\$3,499,026,331	\$133,074,959	3.80%
4471	Gasoline Stations	\$145,649,606	\$5,537,809	3.80%
4532	Office Supplies, Stationery, and Gift Stores	\$25,206,942	\$941,858	3.74%
3324	Boiler, Tank, and Shipping Container Manufacturing	\$58,870,108	\$2,146,453	3.65%
9012	Federal Government, Military	\$154,784,418	\$5,613,479	3.63%
6213	Offices of Other Health Practitioners	\$139,783,387	\$4,998,885	3.58%
4821	Rail Transportation	\$137,896,616	\$4,793,874	3.48%
4461	Health and Personal Care Stores	\$104,510,535	\$3,507,601	3.36%
7115	Independent Artists, Writers, and Performers	\$20,244,658	\$674,358	3.33%
4453	Beer, Wine, and Liquor Stores	\$19,351,913	\$642,863	3.32%
5414	Specialized Design Services	\$18,619,380	\$596,723	3.20%
5418	Advertising, Public Relations, and Related Services	\$58,988,742	\$1,880,542	3.19%
9039	Local Government, Excluding Education and Hospitals	\$631,664,478	\$20,133,029	3.19%
2361	Residential Building Construction	\$182,722,728	\$5,800,190	3.17%
6244	Child Day Care Services	\$53,247,915	\$1,607,855	3.02%
6241	Individual and Family Services	\$139,099,612	\$4,041,810	2.91%
5311	Lessors of Real Estate	\$553,341,783	\$15,856,579	2.87%
4842	Specialized Freight Trucking	\$168,066,126	\$4,799,908	2.86%

Source: Emsi 2019.2 with percentage calculated by CRI

Table 15 represents 85 industries, making it not only the longest but most economically diverse grouping in this report. Using the 2-digit industry classifications, Wabash County's GRP is overrepresented in the following industries, with the number of 4-digit NAICS codes and how Wabash County's total comprises with the same codes' total in NEI-11. This is not the total for the entire 2-digit industries; it only evaluates the total of the codes listed in Table 15.

- Agriculture, forestry, fishing and hunting (4): 10.43%
- Mining, quarrying, and oil and gas extraction (2): 8.23%
- Utilities (2): 4.75%

- Construction (2): 5.35%
- Manufacturing (17): 22.59%
- Wholesale Trade (4): 7.53%
- Retail trade (15): 4.87%
- Transportation and warehousing (3): 3.14%
- Finance and insurance (1): 5.67%
- Real estate and rental and leasing (3): 4.35%
- Professional, scientific, and technical services (3): 4.12%
- Administrative and support and waste management and remediation services (2): 11.42%
- Educational services (2): 12.16%
- Healthcare and social assistance (6): 8.03%
- Arts, entertainment, and recreation (5): 8.55%
- Accommodation and food services (5): 4.46%
- Other services (5): 4.46%
- Public administration/government (4): 3.93%

“TRIPLE PLAY” INDUSTRIES

Table 16a shows the 2018 4-digit NAICS codes that are Wabash County’s “triple-play” industries: an LQ above 1.25, above-average wages, and GRP above \$10 million. The 2018 triple-play classification had 11 industries.

TABLE 16A: 2018 WABASH COUNTY INDUSTRIES WITH LQ ABOVE 1.25, ABOVE-AVERAGE EARNINGS, AND GRP GREATER THAN \$10 MILLION

NAICS Code	Description	2018 GRP	2018 LQ	2018 earnings
2382	Building Equipment Contractors	\$35,524,762	2.02	\$61,091
3221	Pulp, Paper, and Paperboard Mills	\$43,536,701	24.58	\$62,932
3241	Petroleum and Coal Products Manufacturing	\$19,051,763	1.53	\$163,539
3251	Basic Chemical Manufacturing	\$52,351,008	12.37	\$51,083
3329	Other Fabricated Metal Product Manufacturing	\$67,931,808	24.18	\$67,574
3359	Other Electrical Equipment and Component Manufacturing	\$33,580,792	13.08	\$101,583
3363	Motor Vehicle Parts Manufacturing	\$23,628,377	5.61	\$60,492

4238	Machinery, Equipment, and Supplies Merchant Wholesalers	\$12,516,688	1.55	\$71,299
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$21,522,939	3.9	\$70,992
5221	Depository Credit Intermediation	\$34,045,777	1.52	\$60,248
5621	Waste Collection	\$12,165,918	5.44	\$62,709

Source: Emsi 2019.2

Despite the decline in manufacturing employment, six of the triple-play industries remained in manufacturing in 2018.

Table 16b provides a triple-play comparison using Emsi's earliest year for GRP data, which is 2007.

TABLE 16B: 2007 WABASH COUNTY INDUSTRIES WITH LQ ABOVE 1.25, ABOVE-AVERAGE EARNINGS, AND GRP GREATER THAN \$10 MILLION

NAICS Code	Description	2007 GRP	2007 LQ	2007 average earnings
3221	Pulp, Paper, and Paperboard Mills	\$59,384,291	22.51	\$66,021
3241	Petroleum and Coal Products Manufacturing	\$19,102,761	1.57	\$95,314
3262	Rubber Product Manufacturing	\$38,757,196	29.37	\$56,524
3279	Other Nonmetallic Mineral Product Manufacturing	\$19,478,652	17.94	\$63,241
3313	Alumina and Aluminum Production and Processing	\$33,765,960	42.04	\$59,756
3315	Foundries	\$40,624,844	28.56	\$58,045
3344	Semiconductor and Other Electronic Component Manufacturing	\$20,815,045	8.10	\$45,884
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	\$86,822,772	9.39	\$77,165
3359	Other Electrical Equipment and Component Manufacturing	\$12,021,726	5.91	\$66,017
3363	Motor Vehicle Parts Manufacturing	\$15,826,944	5.20	\$36,952
4247	Petroleum and Petroleum Products Merchant Wholesalers	\$16,493,827	1.86	\$44,012
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	\$11,646,916	2.57	\$49,467
5221	Depository Credit Intermediation	\$26,047,469	1.62	\$40,296
9036	Education and Hospitals (Local Government)	\$60,082,290	1.57	\$42,969

Source: Emsi 2019.2

Wabash County's 2007 triple play industries were more concentrated in manufacturing with 10 4-digit manufacturing NAICS codes. Six industries are on both lists: 3221, 3241, 3359, 3363, 4249, and 5221. Accordingly, only four manufacturing industries sustained their triple play status from just before the Great Recession to 2018.

QUALITATIVE ANALYSIS

In addition to the quantitative data listed above, this project included two qualitative components. Transform Consulting Group (TCG) used focus groups, surveys, and interviews of people with ties to Wabash County to understand why they do or do not live and work in Wabash County. The full TCG report is included in the appendix. John Stafford, owner of Make No Small Plans, LLC and local government finance expert, and Mark Becker, an experienced urban planner and independent consultant with Becker Consulting, conducted a series of interviews with community leaders to understand local conditions that may have led to Wabash County's population loss.

FINDINGS FROM TRANSFORM CONSULTING GROUP'S FOCUS GROUPS, SURVEYS, INTERVIEWS

TCG sought information from Millennials born between 1980 and 2000 and transplants who did not grow up in Wabash County, using an online survey, phone interviews, and in-person focus group meetings.

The key findings from TCG's work included:

- Lack of jobs for people with bachelor's degree and limited quality-of-place features were consistent answers about why people didn't (re)locate to Wabash County
 - Quality-of-place includes: social and cultural offerings, physical amenities, and availability of retail outlets
- Sub-issues identified by those who have considered moving to Wabash County but have not: Lack of available housing and perceived quality of K-12 schools
- Family living in Wabash County is a driving factor in staying in or coming back to Wabash County
 - Job opportunities are also key in attracting or retaining people
- Low cost of living may be an attractive feature for transplants

TCG identified the common barriers to having people move or relocate to Wabash County in this report and offered the following recommendations:

- Diversify employment industries
- Address housing issues (inadequate supply for young professionals and executives)
- Invest more resources in K-12 schools

- Market Wabash County, particularly to inform people of jobs and cultural and community opportunities
- Develop more retail and social offerings
- Partner with Manchester University on these initiatives
- Increase number of quality jobs and wages, especially for those with a postsecondary degree

FINDINGS FROM JOHN STAFFORD AND MARK BECKER’S INTERVIEWS

Stafford and Becker interviewed several long-standing members of the community in an effort to gain an understanding of significant events that may have led to population decline. In general, Wabash County’s challenges are part of larger national trends that are playing out locally, namely a loss of manufacturing jobs that have been replaced with low-skill, low-wage service-sector jobs. However the local legacy of corporate and private philanthropy continues to benefit the community to this day.

During those conversations, Stafford and Becker identified four key points that are still playing out today:

1. The 2007 closing of GDX, formerly General Tire and Rubber, was the “wake-up call” that the loss of manufacturing jobs was a critical issue. No other economic event in the past 20-plus years left such a significant and lasting impression.
2. The historic relational divide between the North Manchester and Wabash communities has been substantially removed, providing new opportunities to work together as a county.
3. The public sector in Wabash County was viewed as a well-functioning asset and not a liability, showing local leadership is ready to move the community forward.
4. The upgrade of U.S. 24 from two to four lanes was seen as having both positive and negative impacts. The improvements better connected Wabash County residents and businesses to the greater Fort Wayne area. It also made it much easier for residents to shop and access resources offered in a larger city, often perceived to be at the expense of local Wabash County businesses.

Wabash County has a number of strengths to build upon: Manchester University, the Honeywell Center and its associated facilities, the Community Foundation, engaged leadership, downtown revitalization in Wabash, Ford Meter Box and the Ford family, efforts to address lack of market-rate housing in North Manchester and Wabash, the designation of the City of Wabash as a 2014 Indiana Stellar Community, the strength of the agricultural production operations in the county, and the relatively recent economic development successes of POET and Living Essentials. Wabash County has much about which to be proud. The community cannot afford to undersell itself.

GUIDANCE FROM REPORTS, OTHER EXTERNAL SOURCES

In addition to this project’s own qualitative research and investigation, outside reports and external sources provide insight for the Community Foundation and Wabash County leaders to understand and mitigate population decline. CRI offers the following summaries of these sources.

“2016-17 DEMOGRAPHIC STUDY FOR MANCHESTER COMMUNITY SCHOOLS, WABASH CITY SCHOOLS, AND MSD OF WABASH COUNTY,” MCKIBBEN DEMOGRAPHICS (2016)

The McKibben Demographics school enrollment forecast report referenced in the school enrollment section offers some valuable insight about Wabash County population and migration patterns. This includes:

- The outflow of 18- to 24-year-olds for college or urbanized areas account for the largest segment of negative migration, which is expected to continue.
- The second largest group of out-migrants is households with people 70 and older who are downsizing.
- In-migrants tend to be younger children (up to 9 years old) and their parents ages 25 to 39, typically relocating from less than 100 miles away.
- The age pattern of in- and out-migrants has remained steady even as the number of migrants have changed.
- Existing home sales (rate, magnitude, and price) will be the dominant factor affecting population and enrollment change, regardless of new home construction.
- Fertility rates alone are insufficient to maintain population and enrollment.

“SNAPSHOT OF SMALL CITY SUCCESS,” NATIONAL LEAGUE OF CITIES (2017)

The National League of Cities’ Center for City Solutions issued the “Snapshot of Small City Success” in November 2017.³⁰ The report included a survey of leaders in cities with a population of less than 50,000 residents. The survey’s top three drivers of local economic prosperity are:

1. New business starts (38 percent),
2. Residential property tax values (38 percent), and
3. General employment growth (24 percent).

The top three negative drivers were:

1. Availability of affordable housing (38 percent),
2. Misalignment of worker skills with employer needs (22 percent), and

³⁰ Available here: <http://nlc.org/sites/default/files/2017-11/Snapshot%20of%20Small%20City%20Success.pdf>. (Accessed June 16, 2019)

3. General population declines (22 percent).

“PAST SILOS AND SMOKESTACKS: TRANSFORMING THE RURAL ECONOMY IN THE MIDWEST,” THE CHICAGO COUNCIL ON GLOBAL AFFAIRS (2010)

Although this report is edging up on the 10-year mark, the wisdom from the Chicago Council on Global Affairs’ “Past Silos and Smokestacks: Transforming the Rural Economy in the Midwest” report by Mark Drabenstott still applies today.³¹ In the age of economic globalization, the rural Midwest economy must move beyond “silos and smokestacks.”

This report offers four strategies:

1. Helping rural communities think regionally to compete globally,
2. Focusing public investments on transforming economic opportunities rooted on distinct economic strengths, not smokestack chasing,
3. Spurring innovation and entrepreneurship, by turning ideas and innovations into economic progress, and
4. Creating a world-class entrepreneurial climate and innovation culture to grow new companies, by recycling local wealth.

Nonprofit organizations can supply the founding trust to hold regional partnerships together, but businesses drive the transformation of rural Midwestern economies. The private sector must be at the table, pooling their knowledge with the region’s best new economic opportunities. Frequently traditional economic development occurs among public officials and practitioners. Special attention must be given to inviting businesses to the regional dialogue, making this a requirement in public-supported regional development initiatives.

The report notes this work is not easy. Obstacles include jurisdictional boundaries drawn long ago, devotion to industrial recruitment, and local rivalries often manifested in and through high school athletics.

³¹ This report is available here: <https://www.thechicagocouncil.org/sites/default/files/Heartland%20Paper%20-%20Rural%20Development%2010.pdf> (accessed June 16, 2019).

“WHAT REGIONS SHOULD WE STUDY? HOW SURVIVORSHIP BIAS SKEWS THE VIEW,” INDIANA BUSINESS REVIEW, INDIANA UNIVERSITY KELLEY SCHOOL OF BUSINESS INDIANA BUSINESS RESEARCH CENTER (2019)

Noting that successful regions are the ones to hire consultants and write reports, this article,³² funded with U.S. Economic Development Administration funds and written by Timothy Slaper, studied the economic performance of the 620 American counties with the smallest job growth and their 620 counterparts with the greatest job growth from 2001 to 2016.³³ Recognizing the survivorship bias of most recommendations for economic revitalization, this study looked at the industry structure, occupational structure, innovation, and social capital of these counties.

Key findings:

- Proximity to metro areas had no distinct relationship with employment growth or vulnerability.
- Counties have a trade-off between specialization in existing industries for rapid job growth or a diversifying the local economy to buffers workers from economic shocks.
- Business-related service industries drive overall economic growth.
- Traditional manufacturing jobs “exert a headwind on employment growth.”
- Positive occupations for at-risk regions are business and white-collar occupations, technology and engineering occupations and curiously blue-collar production jobs, which was part of the economic drag because of the high concentration of these jobs in underperforming counties.
- At-risk counties had relatively robust productivity, measured by gross domestic product per worker.
 - This may be due to the increased productivity of remaining workers after job losses.
- At-risk counties enjoy fairly significant business formation rates, but this may be need-based entrepreneurship, not opportunity-based entrepreneurship.
- Business establishment expansion divided by contractions had a positive, significant association with employment growth for all counties and the at-risk locations.

This article emphasizes job-loss responses need to be context-sensitive and feasible for that location. In other words, this work needs to be designed for the local situation, not an imported solution from another locale.

³² Available at <http://www.ibrc.indiana.edu/ibr/2019/summer/article1.html> (accessed June 18, 2019)

³³ The list of underperforming counties was not included in the article.

“THE PREVALENCE OF PROSPEROUS SHRINKING CITIES,” MAXWELL HARTT, ANNALS OF THE AMERICAN ASSOCIATION OF GEOGRAPHERS (2019)

This journal article puts forward the premise that population loss and economic decline are two separate but potentially interrelated phenomena, but a shrinking city is not inherently in economic decline. Citing other research, the author argues that social distress reflects declining economic conditions rather than population loss.

No Indiana cities made the published list of “prosperous shrinking cities,” but multiple suburbs of Chicago and Cleveland did.

Using cities, not counties, as the baseline geography, findings include:

- Population decline has become stigmatized and “can lead to a diminished sense of self-worth, which in turn can provoke civic leaders in shrinking cities to pursue damaging progrowth policies.”
- Cities with population losses exist on an economic continuum between prosperity and decline.
- The possibility exists to lose population but still offer a high quality of place for those who remain.

The study looked at cities with a minimum population of 10,000 in 1980 and 2010. Cities that their adjusted boundaries during this time were excluded from the analysis.

“BENCHMARKING U.S. REGIONAL CITIES: A STUDY AND GUIDE FOR TRANSFORMATION,” FOURTH ECONOMY FOR THE INDIANA ECONOMIC DEVELOPMENT CORP. (2014)

The state of Indiana issued this report³⁴ for the Regional Cities project, which resulted in a \$42 million award for NEI-11. While written for larger cities and multicounty regions, it offers useful guidance on collaboratively moving communities and counties forward.

Using a series of out-of-state peer cities, these lessons emerged from transformed regional cities:

- Bold vision, tenacious leadership, and a broad civic infrastructure
- A region rallies around its city
- Engage and strengthen industry in a whole new way
- Regional investment supports quality of place
- Plans must be visionary, market-based, and action-oriented to guide regional transformation
- Private sector investment responds to business climate and talent base

³⁴ Available for download here: <https://www.iedc.in.gov/programs/regional-cities-initiative/home/Download/f77f299c-34ce-6748-857a-ff0000c19905/> (accessed June 16, 2019).

- Financing regional transformation requires a multifaceted approach
- Long-term partnerships require non-partisan thinking
- Higher-education partners are critical for regional transformation

It also offered these actionable steps for enacting change with an accompanying checklist for possible actions:

1. Recognizing visionary leadership
 2. Identifying unique assets and value propositions
 3. Developing an action agenda
 4. Acting on the plan and demonstrating impact
-

HEADWINDS AGAINST POPULATION GROWTH

Notwithstanding local assets, reversing what amounts to 40 years of population decline is a very ambitious goal. Wabash County experienced a gradual, long-term trend of slow population loss, not a singular, dramatic departure of residents. This may make population loss nearly invisible to many, since they may see the symptoms but not the cause.

Yet continued population decline should be of concern. It impacts K-12 school enrollment and, given the way Indiana funds public education, a concurrent loss in financial support for local school districts. Population loss results in a declining consumer base for local retail and professional service providers. Continued population loss, particularly in the working-age cohorts results in a shrinking workforce for current and prospective employers. Lastly, population loss results in a loss of community leadership depth.

GENERAL OBSERVATIONS

Wabash County's demographic, economic, and locational factors are all working in ways that can lead to further population loss. This is not the fault of past or current leadership or residents. Rather it is a national, macro trend playing out at the local level.

Demographic projections indicate that the segment of Wabash County's population expected to experience growth between now and 2030 are Older Adults (45-64) and Seniors (65+). These cohorts are not likely to result in new family formulation. In addition, the current population is ethnically concentrated in categories with low birth rates. As the 2016-17 McKibben School Demographic Study notes, "in the absence of migration, fertility alone would be insufficient to maintain the current level of population and enrollment within all three of the Wabash County school districts ...".

Wabash County's economy remains concentrated in manufacturing – a sector for which nationally employment is, over the long term, not expected to grow. Wabash County did not experience the rebound in manufacturing employment that has occurred statewide since 2009. As pointed out in Ball State University's 2017 study "How Vulnerable Are American Communities to Automation, Trade, & Urbanization?"³⁵ the Wabash County manufacturing base, along with that of nearly all Midwestern rural counties, is vulnerable to downsizing due to automation and/or moving production to other countries. Secondly, the Financial and Professional Services sectors are significantly underrepresented in the number and growth of jobs, both of which are growing nationally and tend to represent higher skill and higher wage positions. Kosciusko County provides an example of how a different employer mix has positively impacted job and population growth.

Wabash County's geographically isolated location works against it in the 21st Century. It is neither on the federal interstate highway system nor a county immediately adjacent to a growing metropolitan area.

RECOMMENDATIONS

The following includes *baseline* recommendations to build community capacity and strengthen the fundamental ways that Wabash County leaders operate to get things done and *transformational* recommendations focused on projects and activities that can serve as a catalyst for private investment.

These recommendations recognize that there are certain programs and commitments being supported today in the community that must be sustained, at least in the short-term, but these efforts may be influenced or adjusted as work on various recommendations proceed. The challenge is to be open to the new ideas and approaches that emerge through action on these proposals.

The first recommendation is the foundation for everything that follows, as a renewed commitment to community engagement and collaboration is a requirement for success. The other recommendations are grouped by category.

I. OVERALL

- a. **Implement a civic-engagement model.** Fundamental to the community's ability to advance a bold agenda is a commitment to engage Wabash County's diversity – everyone – in key decisions. A potential model is the CivicLab from Columbus, Indiana, which has been used successfully in Midwestern communities.

³⁵ The study, executive summary, data spreadsheet, and associated maps are available at <https://projects.cberdata.org/123/how-vulnerable-are-american-communities-to-automation-trade-urbanization>. (Accessed July 10, 2019)

II. LOCAL GOVERNMENT

- a. **Develop one plan!** Leverage the collaboration among North Manchester, Wabash, and Wabash County to create one countywide comprehensive plan with a shared vision and shared goals for the growth of the entire community, incorporating the Stellar Community work in Wabash. A countywide plan can honor and respect unique attributes yet provide a common language and consistency across jurisdictions.
- b. **Undertake a countywide fiscal policy analysis.** A primary responsibility of local government is to maintain infrastructure capacities. Too often, however, competing demands for limited resources require infrastructure investments to be deferred. The goal should be to “pay as you go” to stay ahead of growth versus managing an increasing backlog of maintenance. This requires the projection of infrastructure needs, an assessment of costs required to meet those needs, an analysis of current resources available to fund maintenance and expansion, and, if needed, an analysis of appropriate options to increase financial resources to stay ahead of growth and maintenance cycles and anticipate future trends. Infrastructure is more than streets, sidewalks, and water and sewer lines. It includes parks, trails, industrial sites, and internet access too.

III. COLLABORATION AND LEADERSHIP

- a. **Align with regional partners.** Wabash County cannot afford to be a fringe player. It must aggressively engage and leverage regional programs and resources. Formal regional alignment is with NEI-11 within the structure of the Northeast Indiana Regional Partnership. Membership within the region containing the state’s second-largest city cannot be dismissed. However with Wabash County’s “edge” location within NEI-11 and commuting patterns with Miami and Grant counties, additional regional opportunities may exist and should be leveraged with all surrounding counties.
- b. **Develop leadership and create ways for leaders to engage and impact the community.** Wabash County is blessed with strong leadership, but new leaders must be continually developed, mentored, and encouraged to sustain the advancement of community goals. Particular attention should be paid to engaging diversity of all kinds, especially young professionals and youth.
- c. **Welcome newcomers, particularly from diverse cultures.** Make an amazing first impression but recognize the first impression is just that; ongoing inclusion strategies will be needed. One exciting opportunity is the development of engagement programs focused on Manchester University’s international students.
- d. **Initiate an inter-community visitation program.** Visit and model the best practices of cities and counties that have made progress in areas of interest to Wabash County. These visits enable leaders to experience and learn best practices, develop stronger relationships with other participants, and accelerate progress toward goals after returning home.

IV. COMMUNITY DEVELOPMENT

- a. **Strengthen the resources and role of the Community Foundation of Wabash County.** Wabash County has a strong history of philanthropic investment in catalytic assets. The Community Foundation is respected among its peers for its alignment of funding with community goals.

Going forward, the Foundation is in a unique position to play a leadership role in growing, coordinating, and focusing local philanthropy to be a strong partner in achieving bold community goals.

- b. **Leverage Wabash County’s unique assets and strengthen their synergy.** Initiate a “deep dive” analysis to understand the exceptional attributes and potential of the Honeywell Center and Manchester University (individually and together). When combined with other community assets, including the Charley Creek Inn, farmers markets, historic architecture, expanding downtown retail, restaurants, and other distinctive features, Wabash County has the potential to establish itself as a destination for arts, culture and education with a rich quality of place.
- c. **Focus on continued downtown revitalization in Wabash and North Manchester.** Active, vibrant downtowns appeal to people of all ages, especially when they incorporate mixed uses of live, work, and play. Know the market and build on momentum to incorporate riverfront access and development.
- d. **Advance housing strategies in Wabash and North Manchester.** Understand market demand for housing options. Target in-fill sites and downtowns, leveraging the exceptional nature and quality of North Manchester and Wabash urban neighborhoods. The goal is to reduce the number of people who live elsewhere only because housing choices are limited inside Wabash County.
- e. **Near-term focus on quality-of-place assets.** With the interesting combination of arts and cultural assets, historic architecture, a boutique hotel, retail, and restaurants, focus on the opportunity to make Wabash a regional evening and weekend destination for arts, entertainment, dining and shopping. As the momentum for downtown revitalization continues and more people visit and experience Wabash, there will be increased demand for retail, dining, and ultimately business investment and housing. For North Manchester, Manchester University is the unique asset to be leveraged. The Hawkins Family Farm’s Fridays on the Farm pizza nights are also an opportunity within unincorporated Wabash County.

V. ECONOMIC DEVELOPMENT

- a. **Be aggressive in support of existing business and employers.** Job attraction should remain part of a balanced economic development effort, but new jobs are more likely to come from companies that already have operations in Wabash County. This work could include incentives to celebrate innovation and should pay particular attention to companies headquartered in Wabash County.
- b. **Establish Wabash County as a benchmark for entrepreneurial support and innovation.** Entrepreneurship can be a critical component to grow the local economy, especially for underrepresented industries or new employment in existing sectors. Wabash County leaders need to establish a culture of risk-taking and innovation for local entrepreneurs. Leverage efforts at Innovate @ INGUARD, collaboration with Wabash City Schools and its Uncharted Learning curriculum, and resources of the Indiana Small Business Development Center (SBDC), the NIIC, and Elevate Northeast Indiana.
- c. **Long-term focus to identify, understand, and leverage Wabash County’s core economic strengths.** Grow Wabash County, the single point of contact for economic development, has an aggressive agenda focused on business retention and attraction, including foreign investment. These programs need to continue. This recommendation seeks to intensify existing efforts by understanding, focusing, and innovating with

Wabash County’s core economic strengths. For example, Wabash County’s production agriculture and ag-supporting industries can create opportunities to diversify employment, including jobs requiring postsecondary degrees. With the number of Wabash County residents commuting to Kosciusko County, opportunities may also exist to align with those industry sectors.

VI. EDUCATION

- a. **Maintain a competitive public K-12 education system.** Engage the community to undertake an assessment to understand the competitive position of Wabash County school districts, with the goal of establishing an action agenda that positions schools in Wabash County as *schools of choice in the region*. This assessment should include options for early childhood education and care that would increase readiness for school and help differentiate Wabash County from competing communities.
- b. **Develop programs to inform K-12 students about local job opportunities and related skill requirements.** Expand the understanding young people have regarding exciting career opportunities that exist at home in Wabash County.
- c. **Create sustainable incentives for young adults to start their careers in Wabash County.** Assess best practices for retaining young talent at home, including investigation of student loan forgiveness programs, corporate partnerships and other proven methods for influencing the career location choices of Wabash County’s young talent.
- d. **Develop programming that encourages community, family and student school engagement** and distinguishes Wabash County as a community that prioritizes educational attainment.

VII. MARKETING/BRANDING

- a. **Build Wabash County’s brand.** With a unique grouping of assets, Wabash County is becoming a destination for visitors from Fort Wayne, South Bend, Lafayette, and Indianapolis and its northern suburbs. This can be a challenging exercise to do well, but recognizing Wabash County’s features can be a great way to build a tourism industry. A successful branding campaign will also build local pride.

CONCLUSION: NO EASY ANSWERS

While this is a series of actions Wabash County leaders might take, none is guaranteed to produce population growth. This is a complex problem that many Indiana communities face and no “Magic Bullet” solution exists. Implementing some or all of these recommendations may include difficult non-profit and public sector decisions, which requires both leadership and a broad base of local support. However, whether or not taking some or all of these recommended actions result in reversing population decline, they should make Wabash County a stronger community for the people and employers currently there.

APPENDIX

TRANSFORM CONSULTING GROUP GIFT VII QUALITATIVE RESEARCH REPORT



TRANSFORM
— CONSULTING GROUP —

Gift VII Qualitative Research Report

**Community Foundation of Wabash County Grow
Wabash County**

May 24, 2019



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1. INTRODUCTION

The Community Foundation of Wabash County (CFWC) and Grow Wabash County engaged Transform Consulting Group (TCG) to assist with the Lilly Endowment GIFT VII Community Leadership grant. Part of the scope of services provided by TCG is to conduct qualitative research related to population decline, specifically collecting data through focus groups, interviews, and surveys from residents, former residents, and workers employed in Wabash County. This report will be delivered to the Community Research Institute, CFWC, and Grow Wabash County to inform the population loss study and recommendations for Wabash County.



2. DATA COLLECTION METHODOLOGY

To investigate population decline in Wabash County, multiple perspectives were sought with a particular emphasis on millennials (born between 1980-2000) and “transplants” (individuals who did not grow up in Wabash County). TCG solicited feedback from these groups through an online survey, phone interviews, and in-person focus group meetings. Each research instrument asked similar questions around affinity to Wabash County and how Wabash County could become a more attractive place to live.

An **online survey** was created for previous residents of Wabash County who were millennials and had graduated from a Wabash County high school but have since moved away. The online survey was sent to a contact list provided by CFWC by TCG. The online survey link was also shared on social media and sent to personal contacts. Nearly 50 people began the survey, and 31 people completed the survey between April 29th and May 8th. The other respondents were disqualified from taking the survey because they still lived in Wabash County, didn’t graduate from a high school in Wabash County, or did not fall in the millennial age group.

TCG held four **focus group meetings** between May 6th and May 9th in Wabash and North Manchester. Each location held a focus group for millennials and a focus group for transplants (not necessarily millennials). Participants were current residents of Wabash County. In total, 16 people participated in the transplant focus groups, and 18 people participated in the millennial focus groups. If a person was invited to participate but could not attend a focus group meeting, they were provided a link to an online survey that mirrored the questions posed to the focus groups. Two people completed the online survey for transplants, and 26 people completed the online survey for millennials.

TCG contacted individuals who work in Wabash County but live outside of the county for phone **interviews**. Seventeen phone interviews were conducted, and one person submitted written answers to the interview questions.

The CFWC, Grow Wabash County, and TCG cultivated a list of potential research participants and sent personal invitations asking for their participation in one of the above options.

Additional methods were used to recruit participants including sharing the survey link on the social media pages of TCG, CFWC and Grow Wabash County as well as an invitation to participate in CFWC’s newsletter.

3. FINDINGS

Previous Residents – Millennials that graduated from a Wabash County high school but have since moved away.

The beginning of the survey asked questions to determine if the respondent qualified to take the survey. Thirty-six people qualified to take the survey, and 31 finished the survey. All respondents were millennials and generally from the younger part of the generation with 32% between ages 18-24 and 52% between 25-30. Two thirds of respondents (68%) were female, just over half (52%) of respondents are single, and 84% have a bachelor’s degree or higher degree.



High School Experience

Survey respondents were first asked a few questions about their high school experience. The majority of respondents (53%) found it to be only somewhat rigorous or challenging. The other half were split between finding it challenging and not finding it challenging.

Respondents generally believed they were able to at least somewhat pursue all the course work they desired in their areas of interest with 42% selecting yes and 42% selecting somewhat.

What was missing in their high school experience was the schools informing them of career opportunities in Wabash County with 61% saying they were not informed and the remaining 39% split between being informed and unsure.

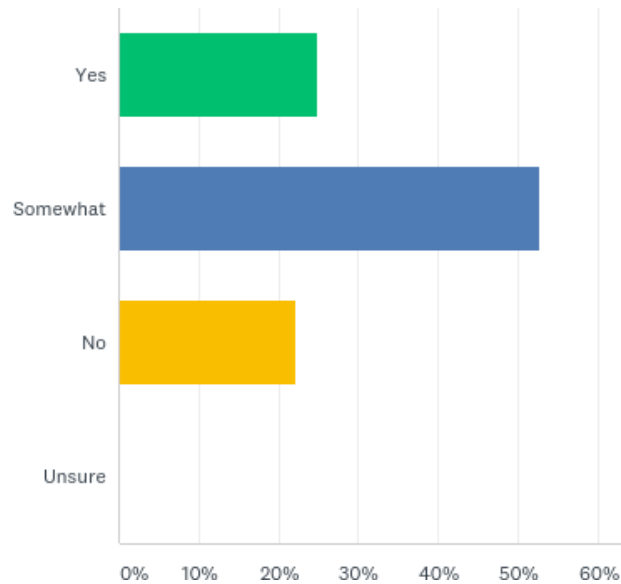


Figure 1: Previous residents on whether they felt their public school experience was rigorous or challenging

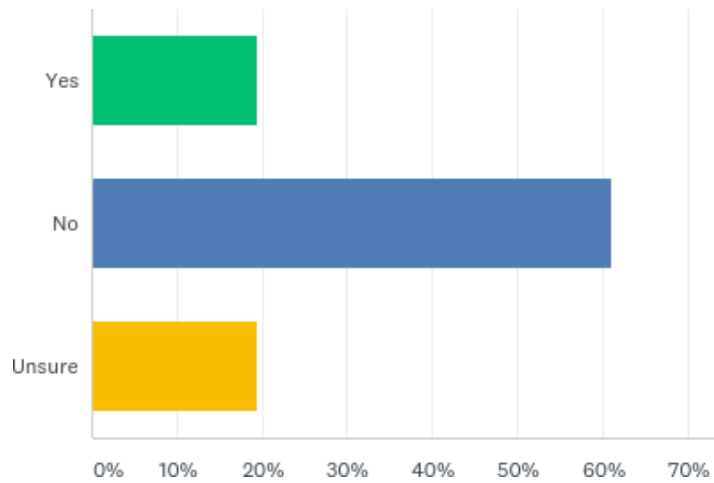


Figure 2: Previous residents on whether their school informed them about career opportunities in Wabash County

Workforce and Higher Education Experience

All but one of our survey respondents pursued higher education after graduating high school. The survey incorporated skip logic at this point to ask the two groups different sets of questions. For the one person who did not continue to higher education, they were asked if high school prepared them for their first job. The respondent’s comment was that “I don't feel like it's the schools [sic] responsibility to prepare me for work. That's my own personal responsibility.” This individual joined the military after high school and was provided additional training there.

Of the 35 respondents who went to college, all 35 were admitted to their college of choice. They generally felt that they were well prepared for college work related to writing and a little less so for college work related to mathematics/analytical skills. However, the majority still selected “yes”.

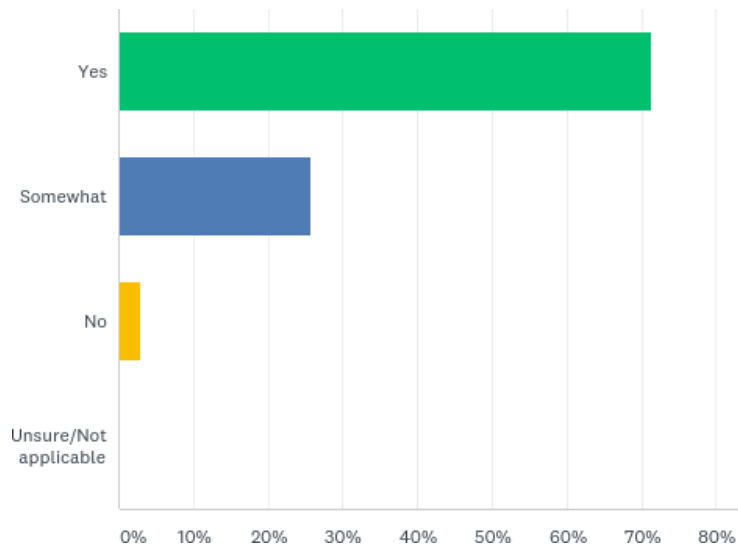


Figure 3: Previous residents on if they were well prepared for the academic work in college related to writing

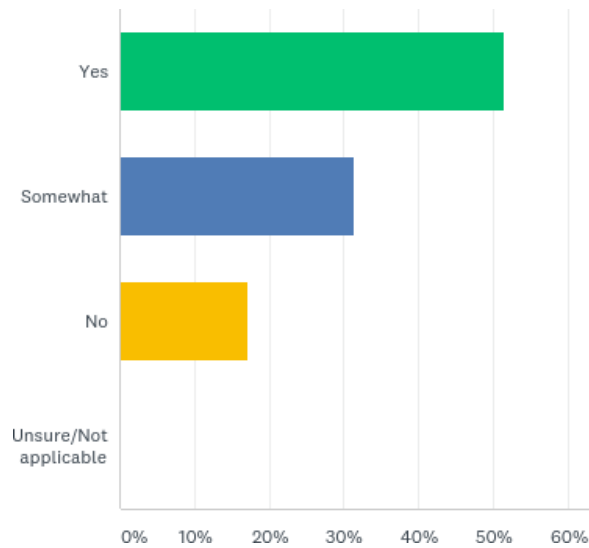


Figure 4: Previous residents on whether they were well prepared for academic work in college related to mathematics/analytical skills

Respondents were then asked the open-ended question of whether they were well prepared for college overall. Generally, the respondents felt well prepared or mostly prepared. About a third of respondents elaborated further that AP courses made them feel prepared, and others mentioned they would have taken more AP courses if they had been offered. One particular area that was mentioned by multiple people was a lack of foundational knowledge in the sciences particularly chemistry and physics.

“I felt prepared for most subjects, including reading, writing, critical thinking, biology. However, I definitely lacked the foundation in math, chemistry, and physics that I saw in my fellow college students.”

“I felt prepared in the courses I did take. I was behind because we did not offer many courses that my college expected you to have already taken.”

“Mostly. I was prepared above average in reading/writing. I felt below average prepared for chemistry/physics.”

Why They Left Wabash County

The top reason for leaving Wabash County was to take a job outside of the area. A close second was the millennial leaving to attend college. For millennials, only 18% had left because their significant other lived elsewhere. The one “other” response referenced leaving for the variety of things to do in a bigger city.

ANSWER CHOICES	RESPONSES	
Culture (I wanted to live in a different community that more closely aligned to my lifestyle and values)	5.88%	2
Family/Friends (A family member or close friend lived elsewhere)	0.00%	0
Military (I left to serve in the military)	0.00%	0
Primary relationship (My significant other lived elsewhere)	17.65%	6
School (I left to attend college/university)	35.29%	12
Work (I was offered a job)	38.24%	13
Other (please specify)	2.94%	1
TOTAL		34

Figure 5: Previous residents on why they moved away from Wabash County

Respondents were also asked if there were any resources or attributes that Wabash County is lacking that contributed to their decision to move away and not return. Similar to the above question, the most selected resource that they said was lacking is employment opportunities selected by 88%. Social offerings was selected by 71%. After that, the next highest item selected was retail attraction at 35%.

ANSWER CHOICES	RESPONSES	
Arts and cultural opportunities	26.47%	9
Education system	14.71%	5
Employment opportunities	88.24%	30
Family-friendliness	2.94%	1
Health services	8.82%	3
Opportunities for people under the age of 21	14.71%	5
Public safety	0.00%	0
Public transportation	8.82%	3
Recreation/wellness opportunities	20.59%	7
Retail attraction	35.29%	12
Social offerings (e.g., vibrant nightlife, good spaces and places to meet and spend time with people)	70.59%	24
Volunteer opportunities	2.94%	1
Workforce training/professional development opportunities for adults	20.59%	7
Your neighborhood/personal network	11.76%	4
No, there are no attributes that Wabash County is lacking.	2.94%	1
Other (please specify)	8.82%	3
Total Respondents: 34		

Figure 6: Previous residents on resources or attributes that Wabash County is lacking

When survey respondents were asked why they think the primary reason most Wabash County residents live there, nearly everyone selected one of two answers: current residents grew up there (68%) or they have family/friends there (29%).

How to Attract and Retain Residents

The top two resources and attributes respondents said contributed to them leaving are the top two responses selected when asked where Wabash County should allocate resources to attract new residents. From there, respondents selected more items than before, but the top two answers are still the only two to be selected by more than 50% of respondents.

ANSWER CHOICES	RESPONSES
Arts and cultural opportunities	30.30% 10
Education system	36.36% 12
Employment opportunities	90.91% 30
Family-friendliness	9.09% 3
Health services	6.06% 2
Opportunities for people under the age of 21	12.12% 4
Public safety	6.06% 2
Public transportation	9.09% 3
Recreation/wellness opportunities	48.48% 16
Retail attraction	45.45% 15
Social offerings (e.g., vibrant nightlife, good spaces and places to meet and spend time with people)	81.82% 27
Volunteer opportunities	3.03% 1
Workforce training/professional development opportunities for adults	33.33% 11
Your neighborhood/personal network	6.06% 2
Total Respondents: 33	

Figure 7: Previous residents on where Wabash County needs to allocate its resources to attract new residents (limited to 5 answers)

A similar question asking about retaining current residents elicited much the same answers.

Respondents were then posed with the question in an open-ended format specifically asking what needs to be done to attract younger people ages 20-30. The top response was that Wabash County needs more job opportunities and quality jobs for people with college degrees. Beyond that, respondents think that Wabash County needs more things to do for both single people and those with families.

“Have more activities to do in the city. For most things, you have to travel a fair distance to reach any attractions that young adults or families with children would want.”

“I think many individuals go on to pursue degrees where there are not opportunities for a career in Wabash.”

“It all comes down to job opportunities for decent/high paying jobs. Any other shortcomings are "forgivable" if you have high paying jobs and affordable housing.”

To attract younger people to stay in Wabash County the answers are much the same and often mention job opportunities. Beyond that, some mentioned improving the schools (K-12) and having appealing public spaces.

Do you think you will ever move back to Wabash County?

The answers for this question are mixed. About a fifth expect they will move back while nearly 40% do not think they will move back and nearly a third are unsure. Respondents who selected “other” are generally unsure as well and provided more specifics:

“Hard saying because now my parents moved from Wabash to Fort Wayne.”

“Only if I believe my future children could have a better education than where I live currently.”

“My partner, a non-native of Indiana, and I often fantasize about moving back to my hometown. I'm not certain how realistic this is, considering the rumors I hear about the Manchester Community School, as well as Manchester University these days. Both institutions would be our primary source of employers should we return.”

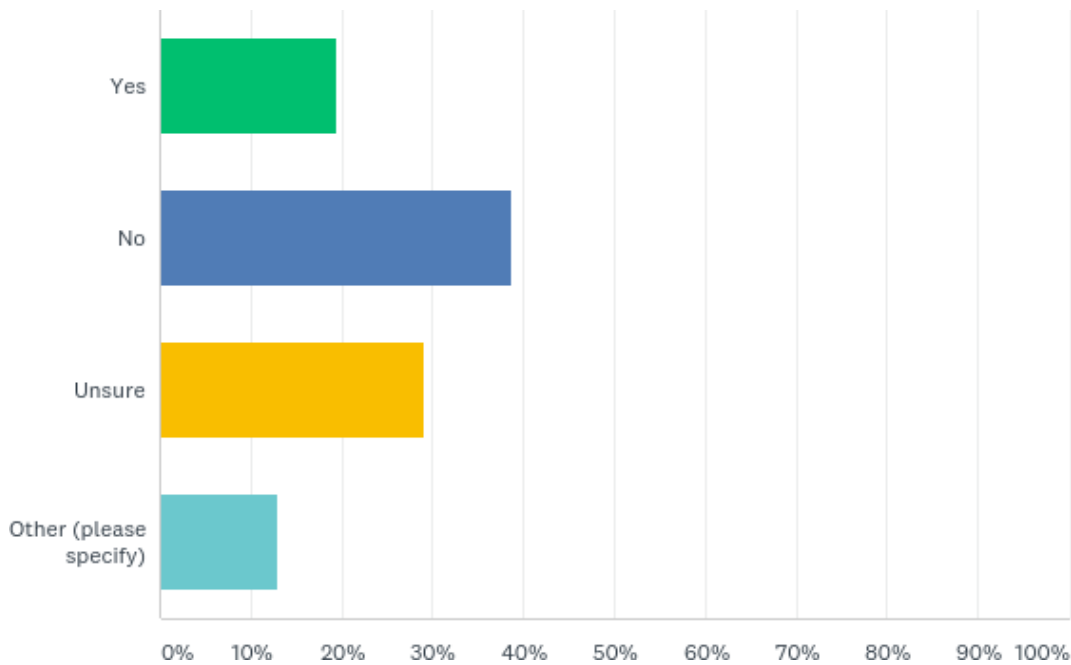


Figure 8: previous residents on whether they will ever move back to Wabash County

The \$5 Million Question

There were 21 responses provided to this question and their answers generally centered around the following themes:

- Improving education
- Attract jobs that require highly educated people
- Invest in business development
- Increase the availability of cultural opportunities, retail, and recreational opportunities

Millennial Survey – Those who stayed or have since returned to Wabash County

For those who could not attend an in-person focus group, they were encouraged to provide their opinions in an online survey. Twenty-six people took the online survey. With such a large number of responses, the online survey responses will be compared to those of the previous resident survey instead of being combined with the answers provided in the in-person focus group meetings.

Workforce and Higher Education

Not only do the millennials who took this survey reside in Wabash County, but the demographics of the respondents are different from those in the previous resident survey. This group is older with the greatest percentage (42%) in the age group 31-39. Females only outnumber males by 8% in this sample, and more than half (58%) are married. Also, a third of the sample has less than a bachelor's degree.

Three survey respondents went straight into the workforce after high school. Two of three felt that their high school experience did not prepare them for their first job, and the third respondent felt that vocational school helped. All three respondents received additional training from their employer.

The majority of those who went to college felt like they were well prepared as did the younger millennials from the previous resident survey, but they mentioned more frequently that while they were prepared academically, they didn't have many real-life skills needed for college.

“Intellectually, but there were no real-life skills like money management.”

“They didn't prepare me for the real world unfortunately.”

How to Attract and Retain Residents

The older millennials who currently live in Wabash County had slightly different ideas for where Wabash County most needs to allocate its resources to attract new resources. Employment opportunities were still the top area to invest in and social offerings was second but only 50% selected it. The education system was selected third with more votes than in the previous resident survey at 46%.

ANSWER CHOICES	RESPONSES	
Arts and cultural opportunities	19.23%	5
Education system	46.15%	12
Employment opportunities	80.77%	21
Family-friendliness	11.54%	3
Health services	19.23%	5
Opportunities for people under the age of 21	7.69%	2
Public safety	11.54%	3
Public transportation	15.38%	4
Recreation/wellness opportunities	26.92%	7
Retail attraction	30.77%	8
Social offerings (e.g., vibrant nightlife, good spaces and places to meet and spend time with people)	50.00%	13
Volunteer opportunities	0.00%	0
Workforce training/professional development opportunities for adults	34.62%	9
Your neighborhood/personal network	23.08%	6
Other (please specify)	15.38%	4
Total Respondents: 26		

Figure 9: Millennial residents on where Wabash County needs to allocate its resources to attract new residents (limited to 5

Respondents were then posed with the question in an open-ended format specifically asking what needs to be done to attract younger people ages 20-30. The top response was the same as the previous residents, that Wabash County needs more job opportunities and quality jobs for people with college degrees. Beyond that, this group is more likely to recommend additional social offerings, retail, and a better nightlife.

“Attract newer more popular business. i.e. (Starbucks, brand name retail, nonsmoking sports bars like Wings Etc.) Also attract higher paying careers. For my certain career I would make \$3-4 less an hour than other counties and markets.”

"Jobs. Things to do on a social level such as restaurants (craft brewery), arts and entertainment, and retail. "

“This has to be job opportunities and social life. Our community has really changed for the better in the past 10 years, but we must continue to provide young people with job opportunities and social opportunities.”

Do you think you will still be living in Wabash County in 5 years?

The millennials who currently live in Wabash County are more likely to say they expect to be here in 5 years however a third are unsure.

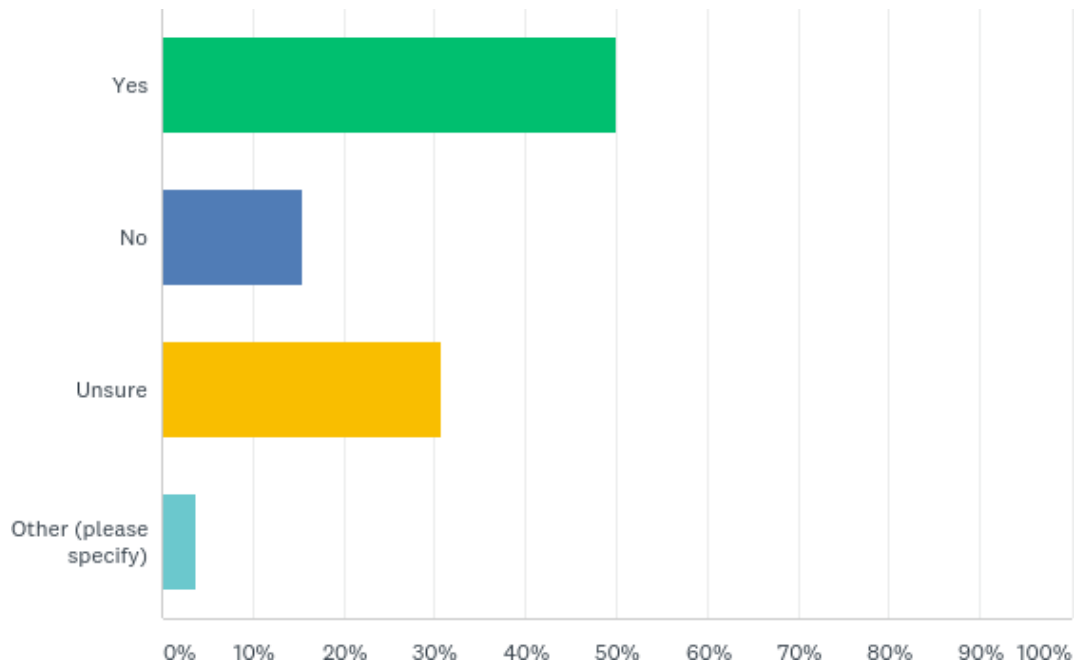


Figure 10: Millennial residents on whether they think they will still be living in Wabash County in 5 years

The \$5 Million Question

There were 19 responses provided to this question and their answers generally centered around the following themes:

- Improving education
- Attracting jobs that require highly educated people
- Investing in business development
- Attracting more retail business
- Increasing activities and things to do for families
- Cleaning up blighted city areas and improve the town facades

Millennials Focus Groups – Who have stayed or have since returned to Wabash County

Two focus group meetings were held with millennials living in Wabash County. The focus group meeting held in Wabash had 11 participants, and the one held in North Manchester had 7 participants. While millennial has been defined as those born between 1980-2000, there were a few attendees that were just a few years older, but still fit the audience we were seeking to attract. The majority of our participants had returned to Wabash County whether leaving for college or for a job after college, many had returned to Wabash County in the last 5-6 years.

High School Experience

The first few questions to the focus groups centered on their high school experience. The majority said they did not find their education rigorous. They felt there were not as many AP courses or advanced courses offered. Some felt the rigor was extremely dependent on the teacher and thus felt prepared for some college classes but not others.

While in high school, many of the participants felt they were not informed about the career opportunities in Wabash County. Some mentioned being aware of opportunities, especially in



agriculture, but were unaware of opportunities outside of that industry, and there were no job fairs to learn about those other opportunities. One of our youngest participants however (graduated in 2016), mentioned that his school had hosted two job fairs, and these provided good networking opportunities.

Workforce and Higher Education Experience

Only one person out of either focus groups went directly into to the workforce after high school. He felt that high school work wasn't correlated to his job and didn't help him to be prepared when entering the workforce. For those who went to college, they generally felt that high school had prepared them well as long as they had been told that college would be different. Many said they had to learn how to study and develop time management skills. AP classes were also good at preparing some for college.

Why They Chose to Remain or Return to Wabash County

Most of the focus group participants said they chose to stay or return to Wabash County because their family is here. Beyond that, about half said they stayed or returned because of a job opportunity. Participants also enjoy the small-town feel and are excited about the progress the county has made.

Satisfaction with Wabash County

To determine how satisfied focus group participants were with various resources and attributes of Wabash County, they were asked to fill out a Likert scale question with the various attributes and rating them from very dissatisfied to very satisfied. The areas in which they were most dissatisfied were employment opportunities, public transportation, and workforce training/professional development opportunities. The areas in which they were most satisfied were family-friendliness, and their neighborhood/personal networks.

When asked why people they knew growing up have left Wabash County, participants mentioned the lack of diversity in employment opportunities, a lack of social offerings, poor housing market, and that those people are not ready to settle down. One participant feels that once people are ready to settle down, they're more likely to move home. The struggle to buy a home is a reason people feel others aren't moving to Wabash County. There isn't a large price range of houses already built; they're either too expensive or cheap but require too much work to rehab.

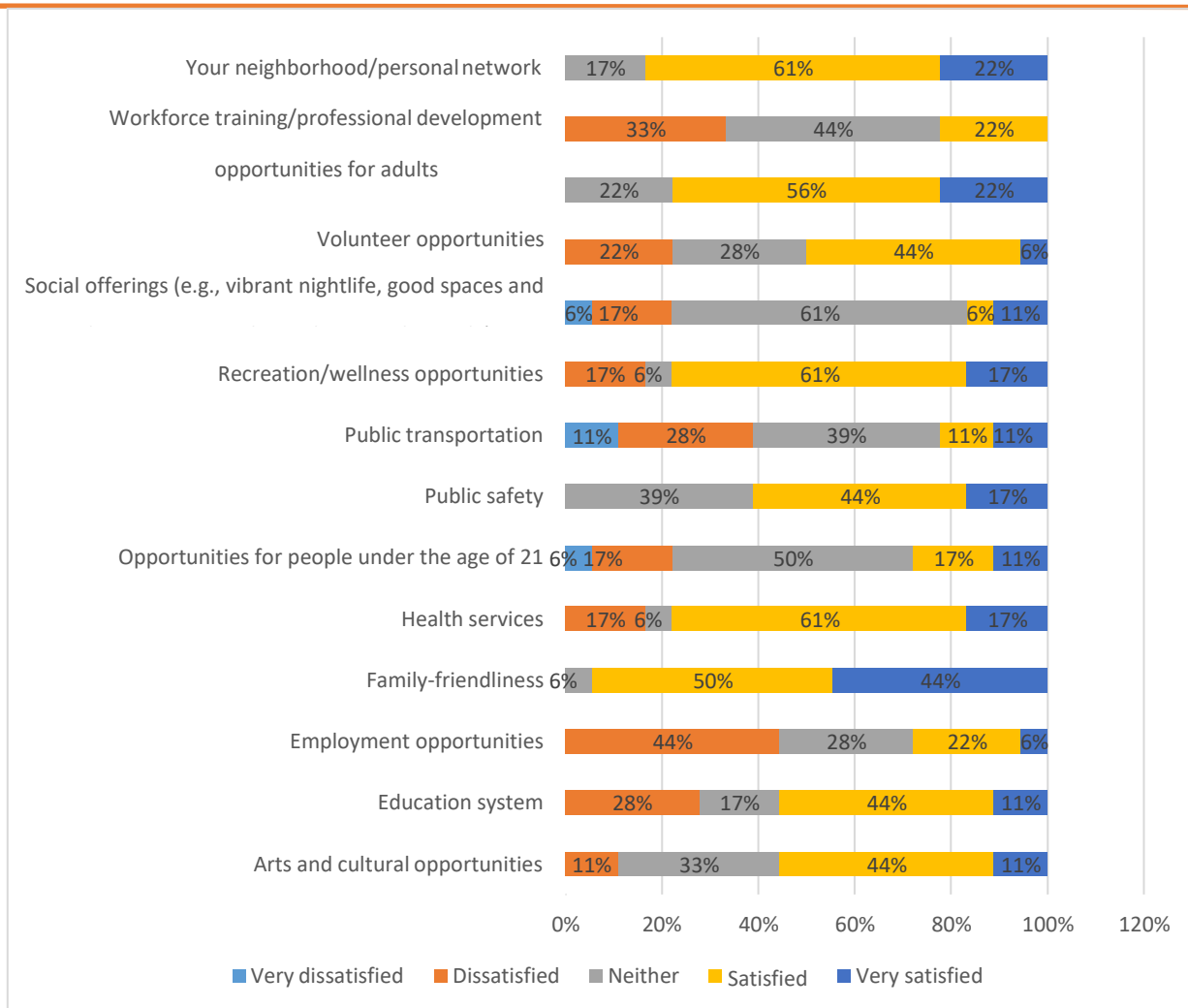


Figure 11: Millennial residents' satisfaction with Wabash County

How to Attract and Retain Residents

The two focus groups came up with three main areas where Wabash County needs to allocate its resources to attract new residents. Those areas include housing as mentioned above, and besides issues with available housing stock, people aren't sure what neighborhoods to recommend to someone moving into the area. The quality of homes and neighborhoods varies from street to street. Employment opportunities in diverse industries with better salaries was discussed as another area of need. And finally, if employment opportunities bring more families to Wabash County, the participants recommended allocating resources to improving the schools and providing better opportunities to kids.

To retain current residents, participants recommended allocating resources to educate high school students on the career opportunities within Wabash County and improve infrastructure and amenities like expanding sidewalks, updating City Park, and adding trails to improve walkability. For high school and college students to stay in Wabash County, one participant recommended more formal collaboration, possibly a county hire liaison, between the high schools, college, and local businesses. As a local business leader, the participant saw a great need for the local government or another entity to help businesses network and recruit new employees to fill their open positions.

Do you think you will still be living in Wabash County in 5 years?

Between the two focus groups, about half raised their hand saying they expect to be living in Wabash County. Many said that their job or their children being enrolled in school were reasons they would stay. For those who think they may move away, one was interested in a bigger town or city where he could walk down a street and not everyone would know who he was. Two others mentioned their salaries as teachers are too low for them to continue to live off of.

Do you think that Wabash County suffers from “brain drain” (once a person gets a post-secondary degree they move away)?

Most focus group participants feel that Wabash County does suffer from brain drain and that the “best and the brightest” don’t always return. Some feel that people aren’t returning because their career tracks aren’t as readily available in Wabash County. One concern raised from this discussion was that the community feels the same, and that it’s lacking different types of social groups to get new ideas in the community. A suggestion was made to see what kids are majoring in to know what our citizens are looking to do and try to keep them in Wabash County.

The \$5 Million Question

There were multiple answers provided to this question, often building on ideas mentioned earlier in the discussion. Responses mentioned centered around the following:

- Attracting diverse industry
- Tax incentives to give businesses a reason to come here including small businesses
- Improve housing market and community upkeep
- Create a destination/attraction (e.g., Great Wolf Lodge) to draw people here to boost the local economy
- Increase early childhood education availability
- Afterschool programming for youth (low income, middle income, at-risk, etc.)
- Increase social events (e.g., first Fridays, community events)

Transplant Focus Groups – Individuals living in Wabash County who did not grow up there

Two focus group meetings were held with transplants living in Wabash County. The focus group meeting held in Wabash had 11 participants, and the one held in North Manchester had 5 participants. While millennial has been defined as those born between 1980-2000, there were a few attendees that were just a few years older, but still had a valuable insight for this project.

Why They Moved to Wabash County

The majority of our participants have lived in Wabash County for 8-10 years. The majority of participants moved to Wabash County for a job (about 70%) while two retired to Wabash County and one moved because of a relationship. One participant mentioned that their top secondary reason for moving to Wabash County was the low cost of living.

When asked what they think the primary reason most current Wabash County residents would give for living there, participants feel work or family are the top reasons for residents.

Satisfaction with Wabash County

To determine how satisfied focus group participants were with various resources and attributes of Wabash County, they were asked to fill out a Likert scale question with the various attributes and rating them from very dissatisfied to very satisfied. The areas in which transplants were most



dissatisfied were retail attractions and public transportation. Housing was not included in the Likert question, but participants brought it up as an area they are dissatisfied with. The areas in which they were most satisfied were family-friendliness and recreation/wellness opportunities.

One person mentioned having looked for 18 months and finding no contenders. Inventory, size, and price are all issues in the Wabash County housing market. Others mentioned rentals are a struggle to find, especially for young professionals in North Manchester. At least one participant has purchased a house outside of the county due to the issues with the housing market.

When asked why they think people choose to leave Wabash County, participants believe it could be attributed to not being connected with the community (poor personal network), a lack of nightlife, or better job opportunities elsewhere. Multiple participants agreed that when people don't grow up in Wabash County, it can be hard to break through and become a part of the community and not an outsider.

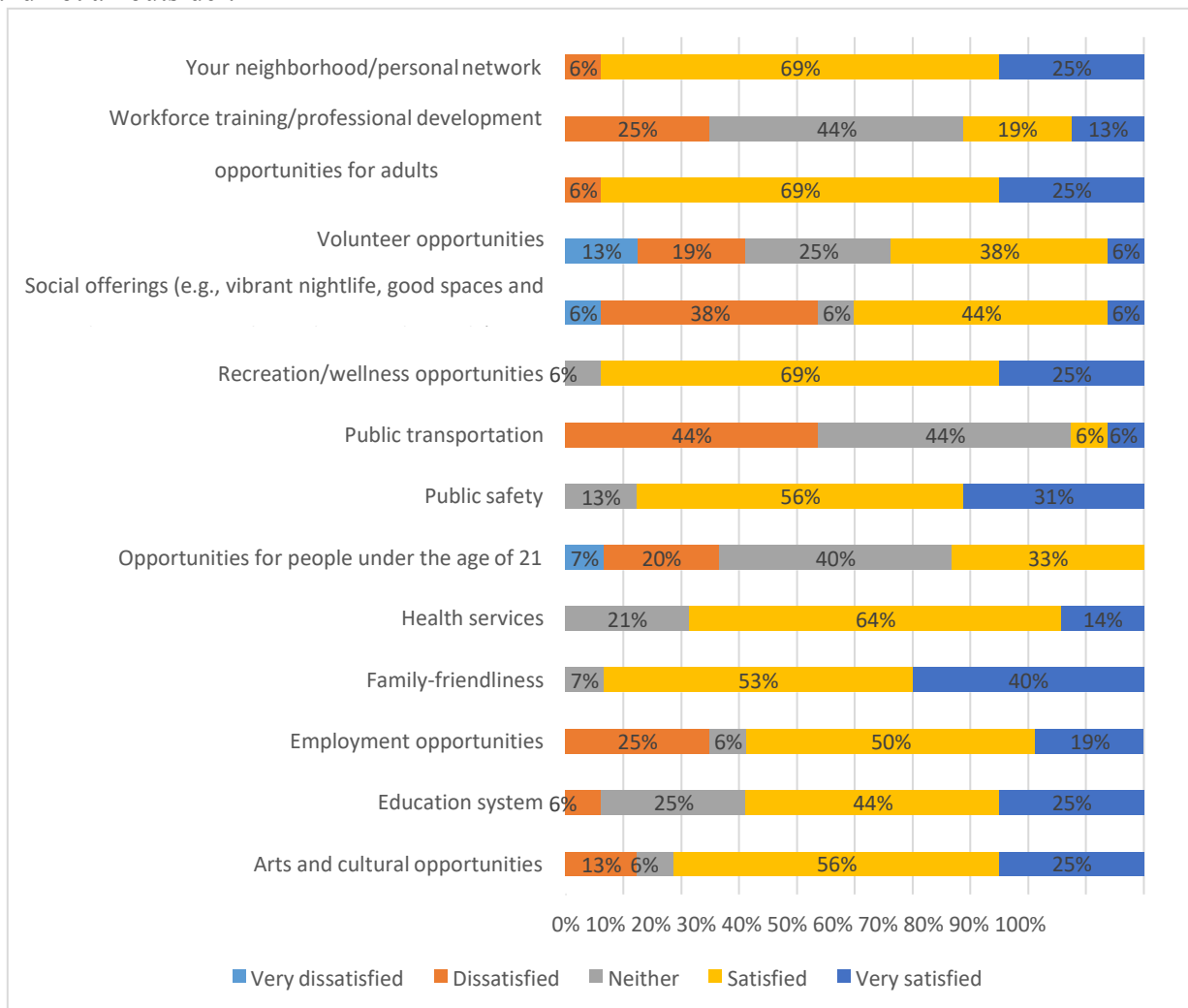


Figure 12: Transplant residents' satisfaction with Wabash County

How to Attract and Retain Residents

The two focus groups came up with four main areas where Wabash County needs to allocate its resources to attract new residents. They believe the county should invest in marketing campaigns, and that the small business revolution did good things for the community. Reliable and fast internet was brought up as something that could attract new residents, especially those who are able to work remotely. Participants also recommended investing resources in quality of life items

(e.g., parks, trails, sidewalks) and promoting opportunities in the (K-12) schools.

To retain current residents, participants recommended allocating resources to recruit young people after they've left for a while. Also, reframe the message that Wabash County is not scared of young people leaving, but that we want them to come back. Encouraging the development of a new medical device factory/think tank with incentives (drawing from industry in Warsaw), and investing in infrastructure at the airport could help retain current residents by providing additional job opportunities and opportunities for corporate advancement.

Do you think you will still be living in Wabash County in 5 years?

These focus groups had more than half of participants raise their hands saying that they believe they'll still be living in Wabash County in 5 years.

Do you think that Wabash County suffers from "brain drain" (once a person gets a post-secondary degree they move away)?

Most focus group participants feel that Wabash County does suffer from brain drain. One participant wonders if the lack of family housing could be exacerbating the issue of people not returning home because they can't find housing. Another thinks maybe brain drain is supposed to happen with good schools turning out good kids. A Manchester University faculty member had noticed that while half of the faculty live in North Manchester, it appears that of the newest 25% of faculty, about a third live in Wabash County. Some of the newer faculty don't think of Wabash as a place to live and instead choose places like Fort Wayne or Indianapolis. With its focus on community, the faculty member thinks the university could be more proactive or partner to help reverse this trend of newer faculty living outside of the county.

The \$5 Million Question

There were multiple answers provided to this question, often building on ideas mentioned earlier in the discussion. Responses mentioned centered around the following:

- Attract new industry
- Improve housing market
- Increase quality of place initiatives
- Bring reliable high-speed internet to the county
- Tax incentives to give businesses a reason to come here
- Community improvements (e.g., fix sidewalks)
- Create a destination/attraction (e.g., Great Wolf Lodge) to draw people here to boost the local economy
- Address education from Kindergarten to college
- Create a marketing/PR campaign to keep Wabash County in the front of people's minds

Interviews - Individuals who work in Wabash County but live outside of the county

Phone interviews were conducted with 17 individuals and one individual submitted written answers to the interview questions between May 3rd and May 16th, 2019. Participants were recruited from personal and professional contacts of Grow Wabash County, CFWC, and TCG who are known to work in Wabash County but live outside the county. The participants were nearly 50/50 female or male, and they ranged in age from early 20's to early 60's.



Where They Live Currently (County)

Allen - 5	Miami - 4
Grant - 1	Whitley - 2
Hamilton - 1	
Huntington - 3	
Kosciusko - 2	

How Long They Have Worked in Wabash County

Participants for interviews varied in age and thus vary in the amount of time they have worked in the county. About a third have worked in the county for 20+ years, a few have worked there for 10-15 years, and nearly half have worked in the county for less than 5 years.

Have they ever lived in Wabash County? Could they see themselves moving to Wabash County?

Only two participants mentioned having lived in Wabash County previously. Four participants lived in Wabash County for college. A couple of participants mentioned that they lived or grew up within a mile of the Wabash County line.

More than half of participants do not see themselves moving to Wabash County. Typically, their reason was that they're established where they are, they're not looking to get a second mortgage, or they're accustomed to the amenities they currently have. About six people said they were unsure. Often it would depend on something occurring such as downsizing once children move and an attractive house available, or something changing that made it so that they were looking for a shorter commute or a lower cost of living.

One respondent thought they might be interested in moving, and that they've enjoyed meeting great people in Wabash County but are unsure of what there is to do for people his age in the area.

Top Reasons for Living in Another County

Below are answers that were brought up in more than one interview in order of frequency (with the top bullet being the item that came up the most often). Having a spouse with a job in another county, a job that required location in a particular area, or better job opportunities in another county was mentioned by half of the interview participants. The commute being easy for many in surrounding counties was one reason they justified being the spouse to commute. Being close to family and having grown up in an area (or already established there) were the number two and three top reasons to decide to live in another county. A couple of participants said they tried to move to Wabash County but couldn't find a house to buy, and two participants mentioned living elsewhere for better schools.

- Spouse's job outside of county
- Close to family
- Grew up there/established
- Couldn't find a house in Wabash
- Easy commute
- Better schools

Best Attributes of Wabash County That Make It an Attractive Place to Live

Below are answers that were brought up in more than one interview in order of frequency (with the top bullet being the item that came up the most often). The best attributes most frequently mentioned were the small-town feel, close-knit community, and the active development/investment in making the downtowns an attractive place.

- Close-knit community
- Small-town feel
- Active development/investment in downtown areas
- People care about the community
- Downtown areas
- Honeywell Center
- University brings in events and speakers
- Family-friendliness
- Low cost of living
- Slower pace community and lifestyle
- Charley Creek Inn
- Small schools

Greatest Challenges That Prevent People from Living in Wabash County

Answers to this question varied more than answers of what the greatest attributes of Wabash County are. In a few cases, some of the previous attributes can also be the greatest challenges to people living in Wabash County such as not being close to a big city, lacking big city amenities, being too small of a community. After vicinity to a large city, job opportunities and the lack of diversity in industry was one of the top answers provided as a challenge to someone moving to Wabash County. Participants also mentioned the lack of retail options (grocery and big box stores for example) and a poor housing market as challenges.

Why do you think most current Wabash County residents would give as their primary reason for living here?

Nearly every participant provided one of two answers to this question. They believe people live in Wabash County because they grew up there and possibly still have family there, or they moved to Wabash County for a job.

Why do you think people choose to move away from the county?

According to participants, the top reason people choose to move away from the county is because of job opportunities. This was mentioned by over half of participants. Some other reasons they believe people move away is because they want a larger city or to move somewhere where there's more to do. The issue of housing also came up with two participants saying that their house was cheaper in Allen County than a comparable house in Wabash County.

How to Attract and Retain Residents (and How to Attract and Retain Younger People)

Participants seem to be in agreement that attracting residents and retaining them in some cases comes down to job opportunities, particularly in new industries and for those who hold postsecondary degrees. The other thing to focus on to attract younger people to live in Wabash County is quality of life initiatives involving community events, entertainment options, more dining, and more shopping. Some participants noted that there are things to do for those who are



elderly or young children, but there are not as many things to do for older youth and adults.

Often the answers on how to retain current residents were similar or the same as those to attract younger people to live in Wabash County. One item that came up more when talking about retaining current residents was investing more resources into schools and new housing developments.

Do you think Wabash County Suffers from “brain drain” (once a person gets a post-secondary degree they move away)?

Many interview participants are educators in K-12 schools or at higher education institutions so their perspective on this question is particularly relevant. Those in higher education feel that many of their students do not stay in Wabash county after graduation including those who grew up here. Some participants know of individuals who looked to stay in Wabash County but couldn't find a job, and that there are few opportunities for jobs for individuals right out of college. Multiple participants mentioned that this is a reason Wabash County needs more job opportunities that span different industries and require different levels of education.

For both age groups, one participant feels they're leaving not because they want to get out but because they lack awareness of what they could do in Wabash County. They're just starting to see some of the short commuting opportunities.

Do you think the reasons for a declining population are similar in Wabash Counties and its surrounding counties?

Most participants feel that Wabash County is not unique in its struggles to keep the population declining. They feel that rural areas across the state and the country are dealing with the same issue. In particular, the decline of the agriculture and manufacturing industries are affecting Wabash County as they are other rural counties.

Some participants mentioned that some areas are growing such as Warsaw due to its booming orthopedics industry and Huntington County being so close to Fort Wayne.

One attribute that participants brought up that not all rural communities have is a local college, Manchester University. Many see that as an opportunity to partner to bring more residents and amenities to the community. Others mentioned that Wabash County is ahead of the work of other counties to address the decline in population by actively working to address the issue.

Have you seen any business closures or layoffs that you believe contributed to population loss in Wabash County within the last 5 years?

Participants familiar with the Wabash area could not think of too many business closures or layoffs in the last 5 years, but most participants from North Manchester were quick to mention the closing of The Foundry as well as two local fast food restaurants. Some noted that while these weren't huge losses in terms of number of employees, the community still felt the loss. A couple of participants mentioned General Tire, and while that wasn't a recent closure, it was a big blow to the city and county that the community is still feeling the effects of.

Some participants noted closures occurring in surrounding counties such as the pending closure of Schneider in Peru which probably employs residents of Wabash County. The major concern mentioned when a participant discusses a closure of a business is whether the county has job



opportunities for these newly unemployed people or whether they'll have to seek employment outside of the county.

Other Reasons for the Declining Population in Wabash County

- Family farms can no longer employ their whole family and are struggling to compete with big farm corporations. (changing dynamics of farming)
- Poor cell phone reception and internet – makes the county look like it's not as advanced or doesn't have the resources to support these things.
- Multiple participants mentioned at different points in the interview, a struggle to be accepted or integrated into the community when you are not from Wabash County originally.

The \$5 Million Question

- Invest in housing, amenities, education, and attract and retain businesses.
- Working with higher education institutions in the county who are bringing the millennials in, to convince them to make Wabash County their home.
- Invest in young graduates by providing high school students scholarships to attend Manchester University or provide loans for students that will be forgiven if they come back to live/work in Wabash County for so many years after graduation.
- Invest more in North Manchester's downtown like they're doing in Wabash.
- Continue initiatives to better the community such as festivals and bike trails.
- Enhance the school systems. Thinks the Wabash County high schools need to consolidate resources, and that the community needs to focus on progress and not so much on tradition.
- Bring housing developers to build in Wabash County.
- Add an attraction and keep building the tourism industry in Wabash County.
- Bring opportunities in emerging industries like technology, entrepreneurship, and starting small businesses that could be driven by younger minds.
- Internships or ways to get people connected to Wabash County so then they'll stay.
- Renovate more places to attract more businesses.
- Continue what's happening in downtown Wabash but expand to roads/buildings, replacing empty lots, and get rid of old factories so site selectors see Wabash as clean and see the best attributes (e.g., river, Honeywell, etc.).
- Invest in jobs.
- Enhance activities throughout the county such as bike trails, parks, and things to do outside the normal work day.
- Entice businesses to come to the county – either with money or other amenities to make it an attractive place.
- Build a water park or other family attraction. (Columbia City just built a small one, and it's been huge for the community.)
- More emphasis on non-traditional students, and those who don't want to go to a year college.
- More emphasis placed on training and potential financial supports (such as those pursuing a CDL or nursing license).
- Marketing of opportunities – what's available to kids, what careers are in our vicinity, and embracing that there might be some opportunities to work outside the county but live in Wabash County.
- Quality of life improvements (e.g., diversity of dining, entertainment, and shopping options)
- Opportunity to partner with the university to develop workforce needed for target industries.
- If we're going to keep people here, we need them to be able to work within the job sectors



here. Part is training and part is attracting employers into the area.

Of note is that multiple participants took a moment to say they appreciate the hard work that has already been going on in the areas of downtown redevelopment, philanthropic investment, and quality of life initiatives. They recognize that leadership is looking to move Wabash County forward and see the county being an example to other counties who haven't begun the hard work of stemming population decline.

4. SUMMARY

From all of our audiences in their responses to surveys, interviews, and focus groups, there were some common topics that came up as barriers to moving to Wabash County and areas to invest resources to attract and retain residents,

Cross-cutting barriers and areas to invest to attract and retain residents:

- Diversify employment industries
- Address housing issues (inadequate supply for young professionals and executives)
- Invest more resources in K-12 schools
- Market Wabash County (particularly inform people of jobs and cultural and community opportunities)
- Develop more retail and social offerings
- Partner with Manchester University on these initiatives (MU is an untapped resource)
- Increase number of quality jobs and wages (especially for those with a postsecondary degree)