

South Central Illinois Regional Economic Performance Metrics

A Regional Economic Innovation Assessment

South Central Illinois Regional Planning & Development Commission
Economic Development District

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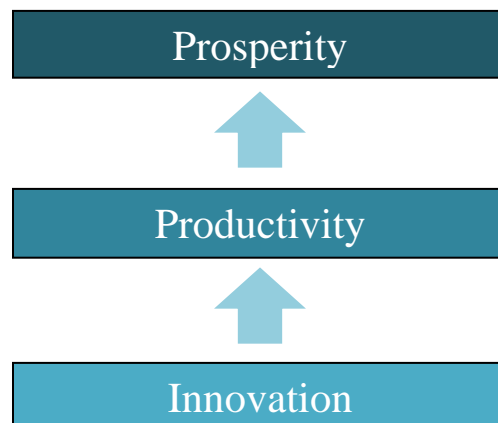
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Commentary on Regional Innovation

Regional Innovation. What is it and who really cares? First, to answer the what, regional innovation can be defined as the rapid diffusion or distribution of knowledge, information, skills and best industry practices within the region. Simply stated, economic growth is increasingly connected to the ability and capacity of regional economies to change their past practices and instead progress forward with new, innovative ways of achieving economic goals. Now to answer the who cares question, it is important to know that every growing business, industry, or company cares about innovation or at least will care in the near future. The development of new ideas to improve efficiency and the provision of new answers to age-old questions is vital to the success of any business or industry in the 21st century economy. The concept of innovation should not only be important to businesses and industries, but it should also be just as important to regional economic development stakeholders.

With information technology booming, any regional economy that wants to have economic success in the future must actively recruit businesses. Not just any businesses, but specifically those that are aggressively and enthusiastically working toward creating innovation in their particular industry. Regional economies should desire to bring in businesses that not only focus on the provision of goods and services, but also research and development. Although the distribution of goods and services do provide the region with instantaneous economic stimulation, it is research and development that provides long-term economic success through the creation of innovation. Regional economies should not only ‘want’ to create an environment of innovation, but should aggressively pursue it. **Figure 1** below illustrates the regional innovation economic development model in the simplest of terms.

Figure 1: Innovation-based Regional Economic Development Model



Source: EDA, Measuring Regional Innovation

This particular report provides an initial evaluation of where the SCIRPDC regional economy currently stands. Throughout this report, it is important to keep the concept of regional innovation in mind when considering the best ways to move forward. Every problem, or current success, that the SCIRPDC regional economy is currently experiencing can be continually improved upon through setting measurable and achievable goals. When those step-by-step goals are put in place, they should be done so with the ultimate goal of creating a regional economic environment that strives for innovation.

What are Regional Economic Performance Metrics?

Regional Economic Performance Metrics offer the opportunity to view the regional economy from a statistics focused perspective that is often either overlooked or completely ignored. Although regional economic development success takes much more than data wielding, no longer do the traditional regional economic metrics such as job growth or business creation alone suffice for the 21st century knowledge-based economy. As stated by ViTAL Economy Alliance,

In order to attract and retain companies and workers today, regions must put more focus on *performance metrics* that measure quality of life, demographic mix, educational attainment, climate of innovation and entrepreneurship, arts and culture, recreation, healthcare, knowledge, and skill assets. These are the factors that current and future companies and talent increasingly care about.¹

The central component of this report is not only its usage of several new data measurements, but also its application of regional trend analysis. Often times economic performance is measured based upon a singular point in time rather than over a period of several years. Although these types of singular measurements can be important in the early stages of economic performance measurement, what these narrow calculations do not provide is an understanding of how the regional economy reached its current state. Due to this fact, applying trend analysis not only helps solve this timeframe issue but also helps answer this most critical question, what specific factors are responsible for the region's growth or decline? Once the region can measure the extent of the economic performance problems, or opportunities for that matter, then the proper actions can be taken to help ensure the future success of the regional economy.

In sum, the purpose of this report is to attempt to provide an answer to that exceedingly important question, how did we get where we are now? After understanding what factors have led to the current state of the regional economy the next step is to begin goal-setting conversations and discussions with regional economic development stakeholders. The ultimate goal being that these Regional Economic Performance Metrics, along with their corresponding goals and objectives, will be incorporated into the region's Comprehensive Economic Development Strategy.

Specifically, the development of Regional Economic Performance Metrics intends on accomplishing three essential objectives. This report aims to achieve the first two of these objectives, while the third can only be completed in concert with regional economic development stakeholders. These three fundamental objectives include:

- Conducting a long-term trend analysis of selected regional economic performance metrics;
- Establishing a benchmark to define where the region is at a specific fixed point in time; and
- Setting Specific, Measurable, Achievable, Relevant and Time-based (S.M.A.R.T.) goals for each of the regional economic performance metrics

Regional Population Trend Analysis

As is shown below, **Table 1** exhibits the region’s population estimates and population projections against those of Illinois and the United States, and **Table 2** furthermore provides the region’s population trend lines. When looking at the SCIRPDC Region as a whole, a troubling trend becomes quite apparent. Four of the five counties in the SCIRPDC Region are projected to continue to experience population decline that will equate to a total population loss of 2,396 from 2010-2030. Effingham and Fayette County are the only counties in the region that are projected to continue to have somewhat strong population increases over the next 15 years. This regional population decline is especially alarming when compared against the State of Illinois and the United States, which are both projected to have continuous population growth. A continually declining population is generally not a welcomed occurrence at any level, but it can have even greater repercussions on regions whose populations are predominantly rural, such as is the case with the SCIRPDC Region.

Table 1: Population Estimates and Projections

Population Estimates					Annual Growth Rate	Est. Projections	
	1990	2000	2010	2015	-	2020	2030
Clay	14,460	14,560	13,815	13,428	-0.29%	13,236	12,858
Effingham	31,704	34,264	34,242	34,371	0.34%	34,949	36,125
Fayette	20,893	21,802	22,140	22,043	0.22%	22,529	23,025
Jasper	10,609	10,117	9,698	9,607	-0.38%	9,426	9,070
Marion	41,561	41,691	39,437	38,339	-0.31%	37,745	36,575
SCIRPDC	119,227	122,434	119,332	117,788	-0.05%	117,504	116,936
Illinois	11,430,602	12,419,293	12,830,632	12,859,995	0.50%	13,181,623	13,840,968
U.S.	248,710,000	281,422,000	309,330,000	321,418,820	1.1694%	340,212,178	379,996,590

Source: U.S. Census Bureau; Population projections estimated using Annual Growth Rate percent

Table 2: Population Trend Lines

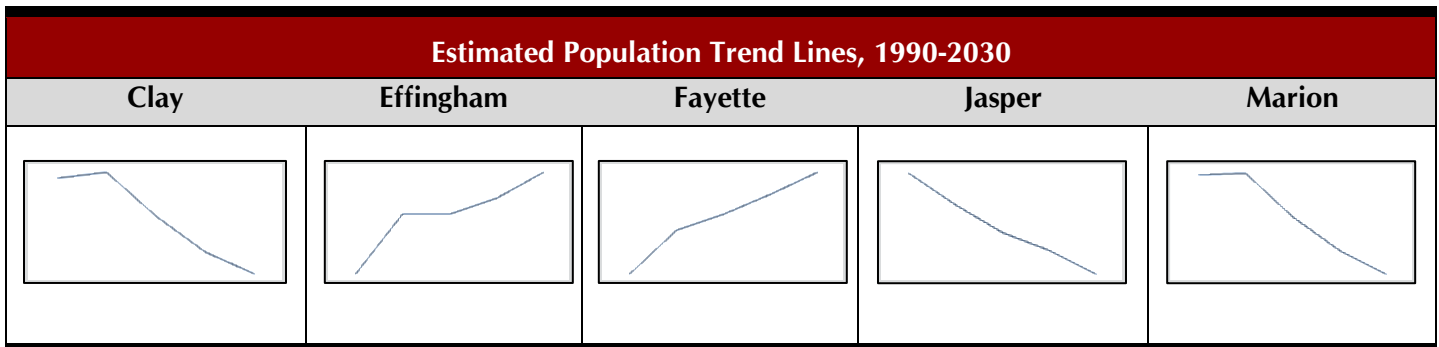


Table 3: Population Estimates Under 18

Population Estimates Under 18 (% of Total Population)				Est. Projections
	1990	2000	2014	2020
Clay	3,678 (25%)	3,483 (24%)	3,193 (23%)	2,912 (22%)
Effingham	9,559 (30%)	9,784 (29%)	8,297 (24%)	7,689 (22%)
Fayette	5,213 (25%)	5,188 (24%)	4,889 (22%)	4,731 (21%)
Jasper	2,998 (28%)	2,620 (26%)	2,158 (22%)	1,885 (20%)
Marion	11,079 (27%)	10,622 (25%)	9,072 (23%)	8,304 (22%)
SCIRPDC	32,527 (27%)	31,697 (26%)	27,609 (23%)	25,851 (22%)
Illinois	2,946,366 (26%)	3,245,451 (26%)	3,054,966 (24%)	3,163,590 (24%)
U.S.	63,604,432 (26%)	72,293,812 (26%)	73,777,658 (23%)	78,248,801 (23%)

Source: U.S. Census Bureau; Population projections based on current trend

Table 4: Population Estimates 18-24

Population Estimates 20-34 (% of Total Population)				Est. Projections
	1990	2000	2014	2020
Clay	2,879 (20%)	2,473 (17%)	2,278 (17%)	2,118 (16%)
Effingham	7,086 (22%)	6,022 (18%)	6,340 (19%)	6,640 (19%)
Fayette	4,606 (22%)	4,252 (20%)	4,238 (19%)	4,281 (19%)
Jasper	2,135 (20%)	1,660 (16%)	1,642 (17%)	1,602 (17%)
Marion	8,534 (21%)	7,057 (17%)	6,750 (17%)	6,039 (16%)
SCIRPDC	25,240 (21%)	21,464 (18%)	21,248 (18%)	19,976 (17%)
Illinois	2,857,333 (25%)	2,662,517 (21%)	2,675,494 (21%)	2,636,325 (20%)
U.S.	55,882,000 (22%)	58,855,725 (21%)	64,717,654 (21%)	68,042,436 (20%)

Source: U.S. Census Bureau; Population projections based on current trend

Table 5: Population Estimates 65 and Over

Population Estimates 65 and Over (% of Total Population)				Est. Projections
	1990	2000	2014	2020
Clay	2,800 (19%)	2,792 (19%)	2,484 (18%)	2,382 (18%)
Effingham	4,412 (14%)	4,767 (14%)	5,478 (16%)	5,592 (16%)
Fayette	3,736 (18%)	3,474 (16%)	3,643 (17%)	3,823 (17%)
Jasper	1,867 (18%)	1,667 (16%)	1,685 (17%)	1,602 (17%)
Marion	7,081 (17%)	6,925 (17%)	6,913 (18%)	6,794 (18%)
SCIRPDC	19,896 (17%)	19,625 (16%)	20,203 (17%)	19,976 (17%)
Illinois	1,436,545 (13%)	1,500,025 (12%)	1,696,283 (13%)	1,713,611 (13%)
U.S.	31,241,831 (13%)	35,991,753 (13%)	43,177,961 (14%)	47,629,705 (14%)

Source: U.S. Census Bureau; Population projections based on current trend

The impacts this can have on the regional economy can be rather damaging if the current population trend continues. A continually declining population will undoubtedly lead to a declining tax base, a lower demand for goods and services, and stretching even further, a declining housing market. These are only a few of the many possibilities that the SCIRPDC Region should be aware of and attempt to mitigate in the coming years and decades.

Taking the population trend analysis one step further, it is also important to consider the region's population age trends in order to attempt to narrow down why these population declines are occurring. **Tables 3, 4, and 5** located on the previous page illustrate three key population age demographics that provide greater insight into the SCIRPDC Region's residents. To begin, table 3 displays past, present and future population estimates of residents that are under the age of 18. Not only is the region illustrating a consistent population decline overall, as shown on tables 1 and 2, but it is also displaying a pattern of decline relative to the regional population under the age of 18.

In practical terms, this demonstrates that the aging population within the region is not being superseded by younger generations quick enough to prevent population decline. This could come from a reduction in regional fertility rates, families moving from the region for opportunities elsewhere or simply a continually aging population that simply cannot be succeeded at a balanced rate. No matter the reason why, several severe issues other than just overall population decline could occur do this this reduction in the under 18 population. What is most important to understand though is the impact that this decline can have on regional public schools. A decline in the under 18 population equates directly to a decline in students within regional school systems, furthermore increasing the likelihood of financial struggle such as decreased funding or resource allocation, and ultimately, if the trend continues long-term, school mergers or even closures.

Next, the regional population estimates for the resident population between 20 and 34 is shown on table 4. This specific age group is critical to the well-being of any local or regional community because it is this age group that will be making up the workforce, the tax base, as well as the local and regional leadership for the next half century. What is evident from this trend analysis is a decreasing number of residents that are 20-34 through the year 2020. However, this decrease is small and two of the region's counties, Effingham and Fayette, actually display increases in 2020 within this particular age group. Initially this finding seems quite discouraging, but one must consider that this is occurring alongside a consistent overall population decline for the region as a whole. Additionally, the State of Illinois and the United States are also both showing a decreasing population trend with the age group 20-34. Overall population numbers do not alone indicate this decrease, but rather it becomes apparent when examining the percent of the total population from the age group. This is most likely occurring because of an ever aging population region wide, state wide and nationwide.

However, when examining table 5, which displays the resident population 65 and older, there is a rather balanced population trend without any large increases or decreases in total percent of population since 1990 and projected through 2020. This data comparison makes the marginal decreasing trend of 20-34 year-olds more worrisome.

In sum, when it comes to attempting to slow down population decline, there is only so much that can be controlled through economic development action plans, for rather obvious reasons. Since this is the case,

the SCIRPDC Region must consider those actions that can be implemented and attempt to mitigate some of the downward trends this population analysis is indicating.

Possible action plans or S.M.A.R.T. goals could be based on increasing the quality of living through increased regional amenities such as parks and recreational areas, cultural opportunities, community or regional events, etc. Another possible goal is increasing workforce development opportunities for the 20-34 age population through continued conversation with regional high schools and community colleges, such as Kaskaskia College or Lakeland College. These are only two of the numerous S.M.A.R.T. goals and objectives that are possible to implement successfully within the region.

The Regional Labor Force

In addition to regional population trends, another important metric to consider when examining the regional economy is the current stability of the region's labor force. **Tables 6 and 7** provide trend analysis of both the region's unemployment rate and labor force participation rate, which is defined as the percentage of the population that is 16 and over currently participating in the workforce.

Table 6: Regional Unemployment

Unemployment Rate				
	1990	2000	2010	2015
Clay	9.4%	5.6%	11.9%	7.1%
Effingham	6.5%	4.1%	8.1%	4.9%
Fayette	8.6%	5.8%	11.4%	6.5%
Jasper	5.6%	4.7%	9.3%	6.3%
Marion	11.0%	5.3%	11.7%	6.9%
SCIRPDC	8.2%	5.1%	10.5%	6.3%
Illinois	6.1%	4.3%	10.4%	5.9%
U.S.	5.6%	4.0%	9.6%	5.3%

Source: Illinois Department of Employment Security; U.S. Bureau of Labor Statistics

Table 7: Labor Force Participation Rate

Labor Force Participation Rate				
	1990	2000	2010	2014
Clay	57.8%	60.2%	59.9%	61.6%
Effingham	67.4%	70.8%	68.8%	68.3%
Fayette	54.7%	57.5%	60.1%	58.2%
Jasper	61.2%	64.7%	66.4%	65.6%
Marion	61.0%	63.0%	61.5%	61.2%
SCIRPDC	60.4%	63.2%	63.3%	63.0%
Illinois	66.4%	65.4%	66.7%	66.1%
U.S.	66.5%	67.1%	64.9%	63.9%

Source: U.S. Census Bureau; Labor Participation Rate equals the percentage of the population 16 and over that is participating in the workforce

Examining both of these employment categories together provides a more comprehensive picture of the current employment situation in the SCIRPDC Region as compared to just one of these metrics alone. The key difference between these two statistics is that persons who are jobless, looking for a job, and available for work are considered unemployed, while the labor force participation rate includes all employed persons and all unemployed persons who are actively seeking employment. Since it is nearly

impossible to accurately predict future unemployment and labor force participation rates, tables 6 and 7 do not include projections.

The region's unemployment rate has had times of growth and decline over the last few decades, but continues to flow similarly to the unemployment rates of Illinois and the United States. As of 2015, the region's average unemployment came in 0.4% higher than the State of Illinois, and a full 1.0% higher than the United States' average. However, since 2010 the regional unemployment rate has fallen over 4.0%, indicating that in recent times the region's employment levels are improving. However, continued growth in employment numbers is definitely possible, as is evident by the region's significantly lower unemployment rate in the year 2000.

Over the last two decades, from 1990-2015, the region's labor force participation rate has increased an average of 2.6%, while the State of Illinois and the United States saw their participation rates become stagnant, and in the case of the United States, actually decrease nearly 3.0%. So, relative to these two larger reference regions, the SCIRPDC Region is doing fairly well in terms of the number of persons currently employed or actively looking for work. This bodes quite well for continued business and industry growth within the region because it illustrates that the region has an above average employee workforce. The most essential next step is to ensure that interested businesses and industries are aware of these statistics, and understand that this region is well-suited for economic development growth. Regional economic development stakeholders must make certain that appropriate steps are taken to keep the current labor force population properly trained and to continue to evolve their knowledge and skill-set alongside the ever-changing 21st century economy.

Continuing the discussion on workforce development and training, another important aspect to consider is the region's education attainment trends. **Table 8**, on the following page, shows the SCIRPDC Region's education attainment relative to that of the State of Illinois and the United States. A strong investment in the regional workforce's education level is critical to future employment opportunities. By 2020, it is estimated that around 67% of all Illinois jobs will require a career certificate or college degree.² This statistic plainly illustrates how important higher education is to the success of the region's workforce.

Although at every level, county, regional, state and national, education attainment has continued to increase at a fairly comparable rate, the SCIRPDC Region still trails the state and national average quite significantly. For example, the region as a whole trails Illinois and the United States by 16% and 13.4% respectively in terms of how many people within the reference region have a Bachelor's Degree or higher.

Although the rurality of the SCIRPDC Region and the lack of localized institutions of higher education definitely play a role in these below average education statistics, there are numerous four year universities within relatively close proximity, including the University of Illinois at Urbana-Champaign to the north; Southern Illinois University in Carbondale and Edwardsville to the south; and Eastern Illinois University in Charleston to the northeast just name a few. With these institutions, along with several community colleges, so close to the region, the population should be attaining much higher levels of education than the current trend is indicating.

It may be the case that the region's population is currently utilizing these institutions, but once they receive the education they are leaving the region for job opportunities elsewhere. Only further analysis

and research on this topic will answer that specific question, but if that is the case then the region must continue to attempt to provide higher level job opportunities to keep our educated population in the

Table 8: Regional Education Attainment

Education Attainment			
	1990	2000	2014
Clay			
<i>% High School Graduate or Higher</i>	65.6%	75.9%	87.3%
<i>% Bachelor's Degree or Higher</i>	7.6%	9.7%	13.5%
Effingham			
<i>% High School Graduate or Higher</i>	75.0%	83.4%	91.3%
<i>% Bachelor's Degree or Higher</i>	13.0%	15.1%	20.2%
Fayette			
<i>% High School Graduate or Higher</i>	68.8%	72.2%	84.0%
<i>% Bachelor's Degree or Higher</i>	8.5%	9.0%	13.4%
Jasper			
<i>% High School Graduate or Higher</i>	69.7%	82.6%	90.8%
<i>% Bachelor's Degree or Higher</i>	8.1%	11.2%	18.4%
Marion			
<i>% High School Graduate or Higher</i>	70.1%	79.1%	86.9%
<i>% Bachelor's Degree or Higher</i>	9.6%	12.1%	13.8%
SCIRPDC			
<i>% High School Graduate or Higher</i>	69.8%	78.6%	88.1%
<i>% Bachelor's Degree or Higher</i>	9.36%	13.8%	15.9%
Illinois			
<i>% High School Graduate or Higher</i>	76.2%	81.4%	87.6%
<i>% Bachelor's Degree or Higher</i>	21.0%	26.1%	31.9%
U.S.			
<i>% High School Graduate or Higher</i>	75.2%	80.4%	86.3%
<i>% Bachelor's Degree or Higher</i>	20.3%	24.4%	29.3%

Source: U.S. Census Bureau; Includes all persons 25 years and older

region. Along with that, the SCIRPDC region must continue to attempt to provide increased regional and community amenities such as retail outlets, restaurants, recreational opportunities, etc. Along with this type of economic development growth will come increased population numbers, increased job numbers, increased employment numbers, and so on. However, this is much easier said than done, and this type of development must be done in harmony with many other regional factors also taken into account. It is not a fast-moving process, but it can be accomplished through step-by-step S.M.A.R.T. goal-setting and strong implementation efforts.

One common, and somewhat obvious, correlation that is found in economic development research is that higher education attainment generally equates to a higher per capita income. As shown on **Table 9**, on the following page, just as the SCIRPDC Region's education attainment numbers trail behind the State of Illinois and the United States, so does the per capita income. Although the SCIRPDC Region does

illustrate a trend of continued growth, the per capita income of Illinois and the United States also continues to grow at a similar rate, making it rather difficult for the SCIRPDC Region to catch up to the larger reference regions without some kind of exponential increase. At a foundational level, in order to increase the per capita income of employed persons within the region, economic development stakeholders must continue to work toward providing the region’s workforce with higher paying job opportunities, as well as the necessary training and education opportunities to fill those positions.

Table 9: Per Capita Income

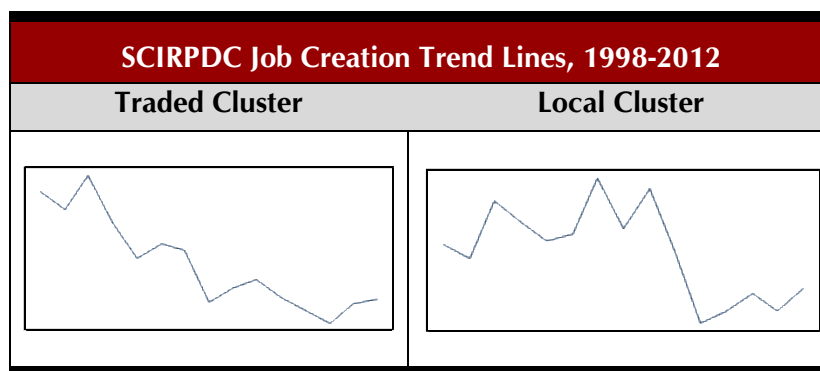
Per Capita Income			
	2000	2010	2014
Clay	\$15,771	\$20,802	\$22,160
Effingham	\$18,301	\$24,843	\$26,774
Fayette	\$15,357	\$21,663	\$21,845
Jasper	\$16,649	\$21,467	\$25,063
Marion	\$17,235	\$20,493	\$22,398
SCIRPDC	\$16,663	\$21,854	\$23,648
Illinois	\$23,104	\$28,782	\$30,019
U.S.	\$21,587	\$27,334	\$28,555

Source: U.S. Census Bureau

Another metric that is directly linked to education attainment and average annual wage is the current regional job creation trend. Specifically, this analysis examines both traded and local cluster job creation from 1998-2012, shown in more detail in **Appendix A and B** at the end of this report. Traded cluster industries can be defined as “industries that are concentrated in a subset of geographic areas and sell to other regions and nations.” Meanwhile, local cluster industries are “industries present in most (if not all) geographic areas, and primarily sell locally.”³

Among the 48 traded clusters included in this analysis, from 1998 to 2012, the SCIRPDC Region actually showed a job creation decrease from 24,112 jobs to 17,350, a total decrease during that time period of 6,762. Although traded cluster job creation did ebb and flow somewhat throughout the 15 year time frame, as shown on **Table 10** below, job numbers for the traded cluster did spiral downward fairly consistently. The largest of this downward trend occurred in the printing services job cluster which

Table 10: Job Creation Trend Lines



Note: Data used to create trend lines are located in Appendix A and Appendix B

decreased by nearly 1,400 jobs from 2004 to 2005. As for the local cluster, which includes 16 cluster categories, a more mixed result is present. From 1998 to 2012, the local cluster job creation numbers also decreased from 32,006 to 31,268 a total decrease of 738 jobs. However, these numbers alone do not illustrate the intricacies of local cluster job creation over this 15 year time frame. Although for the most part the local cluster ebbed and flowed, from 2006 through 2008 the local cluster had a job creation decrease of 2,386 jobs. This exponential decrease is quite evident on table 10 on the previous page. This large decrease most notably came from the local health services industry which dropped over 1,500 jobs in those three years. However, since that time local cluster job creation has fought back, now nearly reaching 1998 job creation totals.

The two large decreases in job creation mentioned above can be termed economic ‘shocks’. These types of changes in the regional economy can have an enormous effect on its success or failure. In order to control the impact that these changes have on the regional economy, regional economic development stakeholders must continue to strive to build economic resilience through strategic planning regarding how to prevent and respond to these possible economic disasters. One very simple way to begin prevention is to continue to be aware and informed of the ever-changing knowledge based economy, and attempt to adjust the region’s economic strategy right alongside it.

Taking the topic of jobs one step further, another economic metric that can be considered is the development and retention of establishments. Establishments can be defined as, “single physical locations where business is conducted or services or industrial operations are performed.”⁴ As shown on **Table 11** below, every county in the SCIRPDC region have shown decreases in the amount of establishments from 2000-2014. However, during this time period, after some significant jumps in the number of establishments in 2005, the State of Illinois and the United States have also experienced decreases in the number of establishments. Although these establishment numbers do not necessarily directly correlate to the number of businesses and industries within the region, these decreases do indicate less business being conducted, and therefore arguably less goods and services being produced and distributed within and outside of the region.

Table 11: Comparative Establishment Performance

Comparative Establishment Performance				
	2000	2005	2010	2014
Clay	376	385	353	362
Effingham	1,094	1,192	1,194	1,193
Fayette	486	492	495	469
Jasper	246	236	211	209
Marion	1,147	1,059	951	931
SCIRPDC	3,349	3,364	3,204	3,164
Illinois	308,067	318,417	314,171	316,120
U.S.	7,050,393	7,479,221	7,396,628	7,563,085

Source: U.S. Census Bureau; Establishments are measured as single physical location where business is conducted or industrial operations are performed

Regional Prosperity and Poverty

When exploring the current state of the regional economy it is also important to consider the relative prosperity of the region. Although measuring regional prosperity can be done in multiple ways, a simple and rather useful method is considering both the Gross Domestic Product (GDP) per capita and current poverty rate trends. These measurements are illustrated below on **Tables 12 and 13**. First, GDP per capita measures the total output of the reference region by taking the region’s GDP and dividing it by the total number of people within the region. This metric is especially useful when comparing one region to another because it illustrates the relative performance of each region without population bias. Despite the many pros of using GDP per capita, it does contain some flaws that must be considered.

While the GDP per capita measurement does measure the overall wealth of each reference region, it does not take into account accumulated wealth and assets such as savings, investments, real estate properties etc. Furthermore, simply stated, any member of the population that does not receive an income, such as a retired person or even a prison inmate, will effectively decrease the reference region’s overall GDP per capita. Nevertheless, this statistic is still widely considered one of the most accurate predictors available to measure the prosperity or wealth of a county, region or country.

With that in mind, table 12 below indicates that the SCIRPDC Region trails behind both the State of Illinois and the United States in GDP per capita. However, two counties, Clay and Effingham, not only follow the per capita levels of Illinois and the United States closely, but are projected to reach even higher levels by 2020. This specifically demonstrates that these two particular economies are currently excelling at well above-average levels, and should continue what has been working over the last 20 years.

Table 12: Prosperity Performance

	Prosperity (GDP Per Capita)			Est. Projections
	2000	2005	2013	2020
Clay	\$38,115	\$39,905	\$47,959	\$54,152
Effingham	\$47,926	\$49,030	\$57,219	\$62,766
Fayette	\$27,008	\$27,089	\$28,025	\$28,553
Jasper	\$28,852	\$28,552	\$30,698	\$31,655
Marion	\$35,909	\$29,860	\$33,243	\$32,009
SCIRPDC	\$35,562	\$35,976	\$40,714	\$43,701
Illinois	\$43,205	\$44,824	\$47,110	\$49,239
U.S.	\$43,536	\$42,397	\$43,536	*\$43,536

* U.S. Annual growth rate calculated to zero

Source: U.S. Cluster Mapping; Projections based on annual growth rate

On the other end of the spectrum, the remaining three counties in the SCIRPDC Region continue to trail the GDP per capita levels of Illinois and the United States quite substantially. Although this does not mean their corresponding economies are not effectively producing, it does demonstrate a continued need for economic growth, specifically the creation and distribution of goods and services to other regions across the nation. To do so, economic development stakeholders must assess what industry sectors are

currently producing and what sectors are not, then, create a balanced economic development strategy using S.M.A.R.T. goals that will allow the current thriving industries to continue to excel, while simultaneously incentivizing and pursuing growth in other less successful industry sectors.

What must be considered further is that two of these counties, Fayette and Marion, have correctional facilities located within their borders with prisoner populations of 1,671 and 1,555 respectively.⁵ Following a recalculation of the GDP per capita measurement to account for the prison population in these two counties, the new GDP per capita numbers increase between \$1,500 and \$2,000 dollars, and although this is somewhat substantial, the final GDP per capita numbers still indicate that both Marion and Fayette counties trail the SCIRPDC Regional average, the State of Illinois and the United States fairly significantly.

Additionally, examining regional poverty rates can also help deepen our understanding of the current regional prosperity level, and specifically display how the SCIRPDC population is fairing versus the larger reference regions of Illinois and the United States. As shown on table 13 below, the SCIRPDC Region as a whole has a projected average poverty rate that is 2.4% lower than the State of Illinois and 3.2% lower than the United States in 2020. However, that does not mean all five counties in the region are

Table 13: Poverty Rates

	Poverty Rate			Est. Projections
	2000	2010	2014	2020
Clay	11.8%	15.3%	13.9%	15.0%
Effingham	8.1%	9.9%	10.5%	12.1%
Fayette	12.2%	15.8%	16.4%	18.8%
Jasper	9.9%	10.8%	6.6%	5.7%
Marion	15.8%	16.5%	19.2%	20.0%
SCIRPDC	11.6%	13.7%	13.3%	14.1%
Illinois	10.7%	13.8%	14.4%	16.5%
U.S.	12.4%	15.3%	15.6%	17.3%

Source: U.S. Cluster Mapping; Projections based annual percentage growth rate

experiencing below-average poverty rates. On the contrary, both Fayette and Marion County have well above-average poverty rates that are expected to continue to balloon, reaching nearly, and in the case of Marion County, passing 20% by the year 2020. Not unexpectedly, Fayette and Marion County also have two of the lower GDP per capita levels within the SCIRPDC Region. This finding is not a coincidence and illustrates how important an active and healthy economy is to the prosperity and quality of living for the residents of those specific counties as well as the region as a whole. Although it is rather difficult to attempt to eliminate poverty head on, developing and achieving simple step-by-step S.M.A.R.T. goals to help improve the regional economy will in turn assist in decreasing the current poverty rate trends.

Physical Infrastructure

The success of a regional economy is also closely related to the capacity within the region to support innovation and economic growth. A large part of this capacity is desirable physical assets such as diverse and affordable parcels of land, high quality transportation capacity such as roadways, railways, air, etc., the physical location of the region and corresponding access to large metropolitan markets, and finally, the availability of information and communication technologies such as broadband.

Among the SCIRPDC Region's 13 industrial and business parks, located in eight separate municipalities, there is approximately 659 available acres for new business development or expansion out of a total of 1,422 acres. This equates to an occupancy of about 54%, illustrating that the region has plenty of room for continued industrial and business growth.

Moreover, as indicated below on **Figure 2**, the region has more than adequate roadway access with both Interstates 57 and 70 stretching through the region along with several U.S. Highways including U.S. 40; 45; 50; and 51. Furthermore, interstates 55 and 64 are located just to the west and south of the region respectively. More information regarding the usage of these roadways can be found in the regional freight truck analysis.

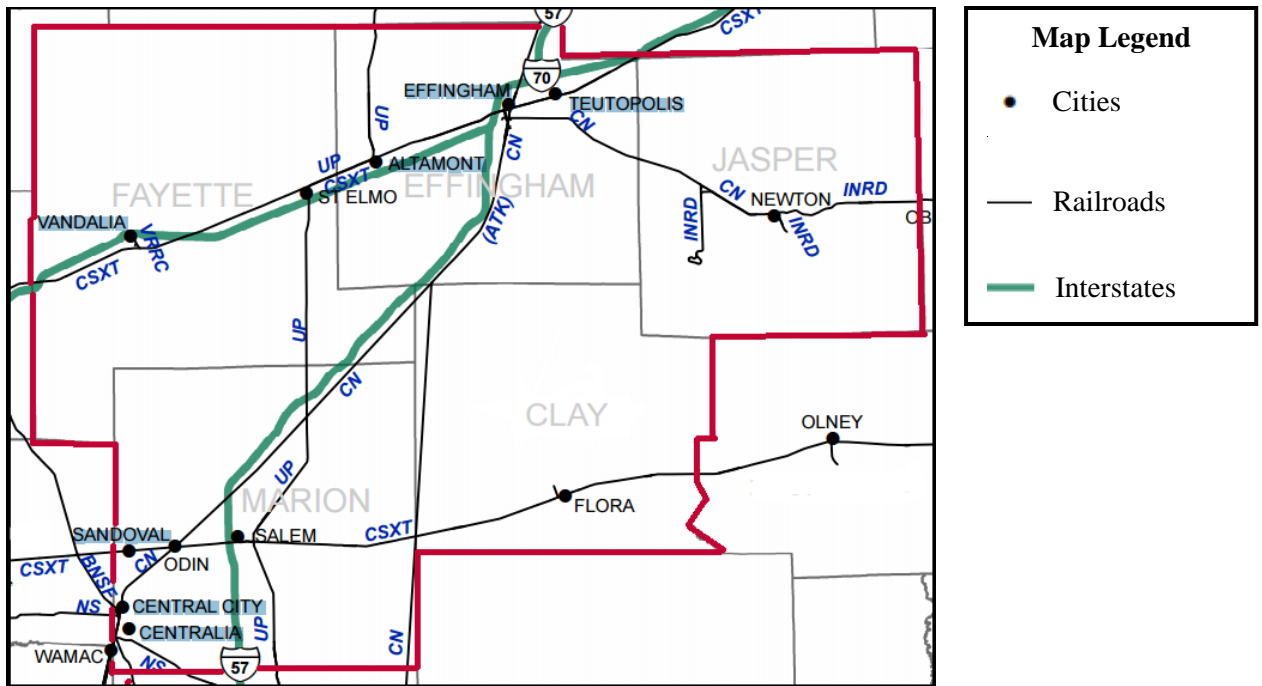
Figure 2: Regional Roadway Infrastructure



Source: ArcGIS, U.S. Department of Transportation

Figure 3, on the following page, displays the regional railroad infrastructure. After reviewing both the regional roadway and regional railroad map, it becomes apparent that the region has first-rate transportation infrastructure. Through both roadways and railroads the region has direct access to several large metropolitan markets including Chicago, St. Louis, Memphis, and Indianapolis to just name a few.

Figure 3: Regional Railroad Infrastructure



Source: IDOT Railroad Map, 2012

The SCIRPDC Region also has four municipal and one county airport that cover four of the region’s five counties, Jasper County excluded, and have a ranging capacity for various types of aircraft. The locations of these airports include Centralia, Effingham, Flora, Salem, and Vandalia. More information regarding these airports can be found in the region’s aeronautics studies.

The last portion of the region’s physical infrastructure that needs to be examined is the availability of information and communication technology, defined here as broadband access. **Table 14** provides a comparative summary of the region’s broadband access in 2015 versus 2016.

Table 14: Regional Broadband Access

Regional Broadband Access				
	2015		2016	
	% 25+ MBPS	% 50+ MBPS	% 25+ MBPS	% 50+ MBPS
Clay	47.0%	8.8%	58.0%	18.0%
Effingham	64.2%	62.6%	66.9%	65.1%
Fayette	57.3%	8.6%	60.1%	8.6%
Jasper	38.2%	0.4%	41.0%	0.4%
Marion	69.8%	68.3%	71.7%	69.0%
SCIRPDC	55.3%	29.7%	59.5%	32.2%

Source: Broadbandnow, 2016; MBPS = Megabytes Per Second

Overall, the SCIRPDC Region has seen excellent progress over the past year in terms of broadband access. In terms of individual counties, both Marion and Effingham County have above-average broadband access, which is critical to recruiting and retaining businesses and industries that have a strong focus on research, development, and innovation. The remaining three counties in the SCIRPDC Region, Clay, Fayette and Jasper, each have below average access to broadband. Although this may not seem to be a critical component to economic development growth at the present time, in order for continued growth in the future, strong efforts need to be put into increasing the accessibility and availability of broadband for the region's businesses and industries, not to mention the residential population. In sum, the region's physical infrastructure is well above-average overall, but one area that is definitely in need of improvement in the coming years is the area's accessibility to broadband.

The Regional Innovation Climate

The last, but arguably most important aspect of a regional economy is its innovation capacity (inputs) and innovation results (outputs). Although attempting to define such a multifaceted concept such as innovation into one specific measurement is difficult, to say the least, **Table 15** below offers an attempt at doing exactly that. This innovation index takes into account four separate variables or measurements of the regional economy and combines them together through a specified weight scale. Those other variables include Human Capital (30%), Economic Dynamics (30%), Productivity and Employment (30%) and Economic Well-Being (10%). Merging these four separate measurements of a regional economy into one singular index provides a basic, and yet vitally important look at regional innovation capacity and results.

Table 15: Regional Innovation Index

Regional Innovation Index Measurement					
	Inputs and Capacity		Outputs and Results		Innovation Index
	Human Capital	Economic Dynamics	Productivity & Employment	Economic Well-Being	
Clay	100.3	86.6	78.5	99.8	89.6
Effingham	83.4	90.9	103.9	103.9	93.8
Fayette	70.4	77.5	71.9	96.1	75.5
Jasper	74.9	73.2	73.2	103.8	76.8
Marion	77.1	90.5	77.8	96.5	83.3
SCIRPDC	80.6	85.7	87.2	99.7	86.0
Illinois	99.5	89.7	97.0	96.1	95.5
U.S.	100.0	100.00	100.00	100.00	100.00

Note: The United States is set at 100.00 in order to provide a region of comparison. Source: Stats America Innovation Index, 2015

Although accurately interpreting this innovation index is not simple due to the multiple factors considered, what is obvious is that the SCIRPDC Region as a whole trails the State of Illinois average in each category except for the output measurement of Economic Well-Being. However, this specific measurement only accounts for 10% of the total Innovation Index measurement therefore not affecting the overall Innovation Index as strong as the others. To take this one step further and to provide an even more relevant comparison, **Table 16**, on the following page compares the SCIRPDC Region against six other close proximity regional planning areas in Central and Southern Illinois.

What is first noticeable on table 16 is that among the seven Southern Illinois planning regions, SCIRPDC ranks second in the overall Innovation Index, only trailing WCDC, which includes seven counties to the west of the SCIRPDC Region. This specifically illustrates that the SCIRPDC Region is, relative to Southern Illinois as a whole, at the high end of the innovation spectrum with well-above average scores in each of the separate innovation categories, possibly barring only the Human Capital category. The category that really sets the SCIRPDC Region apart, along with the WCDC Region, is the Output and Result measurement of Productivity and Employment. This category includes statistics such as Gross Domestic Product per Worker, Job Growth, Patents per Worker and High-Tech Employment.

Table 16: Regional Comparative Innovation Performance

Regional Comparative Innovation Performance					
	Inputs and Capacity		Outputs and Results		
	Human Capital	Economic Dynamics	Productivity & Employment	Economic Well-Being	Innovation Index
SCIRPDC	80.6	85.7	87.2	99.7	86.0
*WCDC	77.3	84.0	84.3	100.2	83.7
*SIMAPC	87.0	86.5	94.4	99.9	90.4
*GERPDC	86.0	83.2	77.5	101.0	84.1
*GWRPC	82.3	85.9	77.9	101.6	84.0
*SFRPC	70.0	77.1	72.3	101.1	75.9
*SIRPDC	80.2	81.5	77.8	103.1	82.2

Source: Stats America Innovation Index. *Acronyms for planning commission regions are defined at the end of this report.

The question that still remains is how these innovation measurements equate to actual economic growth and stability within the regional economy. An attempt at answering this question was made by the research team that developed the Innovation Index measurement, and through quantitative analysis the research team found four specific indicators that have a positive significant relationship to overall economic growth. Two of these indicators came from the category Human Capital and they include both the percent of the population ages 25-64 with some college or an associate’s degree and the population growth rate for ages 25-44. One indicator, the average number of small establishments per 10,000 workers, came from the Economic Dynamics category, and the final indicator, from the productivity and employment category, was the change in high-tech employment share.⁶

Another more specific innovation metric that can be useful to examine further is the issuance of utility patents. **Table 17** provides some detail regarding the number of utility patents the region has received from 1998-2010. A utility patent can be simply defined as a patent that is issued by the U.S. Patent and Trademark Office (USPTO) for the “invention of a new and useful process, machine, manufacture, or composition of matter, or a new and useful improvement thereof...”⁷

When a business is truly innovative and puts great emphasis on research and development what undoubtedly occurs is idea generation. From there it is up to the development team to hone in on the idea that was created and turn it into a reality. Following testing and further development the final product or process can then be sent in for a utility patent. Although this is a rather unsophisticated summary of how an idea can become reality, it is important to have a general understanding. Furthermore, utility patents are a direct link to innovation. Businesses that patent their ideas are businesses that are worth much more than just the goods and services they provide.

Table 17: Issuance of Utility Patents

Issuance of Utility Patents			
	1998	2004	2010
Clay	1.70	1.37	*
Effingham	6.97	6.91	5.89
Fayette	*	1.55	1.79
Jasper	2.62	3.40	3.74
Marion	1.62	*	.76
SCIRPDC	3.56	3.35	3.19
Illinois	7.17	6.04	7.23
U.S.	5.55	7.33	9.63

Source: U.S. Cluster Mapping; Innovation Performance is measured as the number of utility patents per 10 thousand employees; * No patents shown that year

As is shown above, the SCIRPDC Region displays mixed results regarding the issuing of utility patents to regional businesses and industries. On average, the region has seen small decreases over the past 12 years, while the State of Illinois and the United States have steadily increased the number of utility patents per 10 thousand employees, excluding the slight drop in 2004 for the State of Illinois. What is quite obvious is that the SCIRPDC Region is far behind the two larger reference regions in terms of the number of utility patents. Continuing to stress the importance of research, development and idea generation will undoubtedly help to increase this slow moving issuance of utility patents that is currently trending in the SCIRPDC Region

Summary and Conclusion

This report has provided an assessment of the SCIRPDC regional economy using several metrics that are often underutilized. These regional economic metrics are not meant to be only informative, but also the foundation for S.M.A.R.T. goal-setting and regional economic development planning over the next several years. With this data in hand hopefully it will become easier to see the current direction of the SCIRPDC regional economy, and what changes are necessary to produce positive economic results.

This analysis will hopefully spark increased conversation on where the SCIRPDC Region wants to go in the future, and provide a basic framework to build upon to reach those economic goals. The next step is to begin regional collaboration regarding these economic performance metrics, as well as the concept of regional innovation, and start to put in place S.M.A.R.T. goals that will be included in subsequent regional Comprehensive Economic Development Strategies and will furthermore increase the quality of life for the region's residents and improve the existing regional economy.

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Planning Commission Acronyms

WCDC: West Central Development Council

SIMAPC: Southwestern Illinois Metro and Regional Planning Commission

GERPDC: Greater Egypt Regional Planning and Development Commission

GWRPC: Greater Wabash Regional Planning Commission

SFRPC: Southern Five Regional Planning District and Development Commission

SIRPDC: Southeastern Illinois Regional Planning and Development Commission

Appendices

Appendix A

SCIRPDC Regional Traded Cluster Job Creation 1998-2012									
Cluster Name	1998	1999	2000	2001	2002	2003	2004	2005	2006
Automotive	2315	2005	4380	3005	2580	2805	2980	2565	2565
Lighting and Electrical Equipment	570	570	945	945	570	630	395	20	30
Wood Products	725	665	1070	1060	695	665	1030	705	1190
Food Processing and Manufac.	861	810	1197	996	785	674	730	723	685
Furniture	355	625	575	565	565	450	500	500	490
Electric Power Gener. and Trans.	175	175	375	175	175	10	0	0	0
Distrib. And Electronic Commerce	2118	2387	2324	2311	1987	2605	2690	2596	2736
Construction Prod. and Services	234	233	335	410	303	440	320	300	330
Business Services	789	887	874	1040	657	815	905	1005	1212
Upstream Metal Manufacturing	180	190	250	260	355	295	355	355	355
Education and Knowledge Creation	30	30	90	90	90	50	40	50	50
Financial Services	370	390	400	390	380	370	420	380	407
Plastics	3110	2745	3120	2120	1645	1695	1320	1470	1155
Textile Manufacturing	60	70	70	60	0	0	0	0	0
Communications Equip. and Serv.	10	10	20	20	30	40	40	30	20
Coal Mining	10	10	10	10	0	0	0	0	0
Vulcanized and Fired Metals	10	10	10	0	10	10	10	10	10
Forestry	90	90	90	90	100	110	90	80	20
Insurance Services	140	140	140	140	140	140	150	130	140
Video Production and Distribution	20	20	20	10	10	10	10	10	10
Downstream Metal Products	0	0	0	0	0	0	190	175	0
Downstream Chemical Products	185	185	185	245	255	455	195	185	195
Environmental Services	20	30	20	20	50	40	30	20	20
Nonmetal Mining	10	10	10	30	20	30	30	30	30
Leather and Related Products	10	20	70	90	70	70	80	80	80
Medical Devices	10	10	10	10	10	10	10	10	10
Music and Sound Recording	10	10	10	10	10	10	10	10	10
Metal Mining	10	0	0	0	0	0	0	0	0
Performing Arts	30	30	20	30	30	50	40	30	30
Hospitality and Tourism	856	1114	845	815	780	806	875	755	785
Agricultural Inputs and Services	80	70	40	50	40	30	50	60	30
Paper and Packaging	365	365	315	315	305	245	185	185	385
Oil and Gas Production and Trans.	649	508	594	597	473	613	670	563	697
Jewelry and Precious Metals	0	0	0	0	10	10	10	10	10
Livestock Processing	110	60	50	50	100	50	40	40	30
Inform. Tech. and Analy. Instrum.	150	100	90	90	80	140	160	140	150
Apparel	410	235	245	245	255	265	255	90	90
Metalworking Technology	465	265	275	275	295	325	315	265	265
Transportation and Logistics	870	715	656	679	670	843	945	843	712
Marketing, Design, and Publishing	1215	840	860	485	853	549	541	270	240
Recreation. and Small Elect. Goods	620	570	195	205	185	185	195	255	195
Printing Services	3260	3250	2825	2720	2803	2671	2570	1173	1619
Prod. Tech. and Heavy Machinery	2475	2580	1570	1520	1520	1570	995	915	1040
Footwear	0	0	10	10	0	0	10	10	0
Upstream Chemical Products	0	0	0	0	0	0	60	70	70
Trailers, Motor Homes, and Applia.	0	0	0	0	10	10	10	10	0
SCIRPDC Totals	24112	23029	25190	22188	19901	20791	20456	17123	18098

Source: U.S. Cluster Mapping

Appendix A Cont.

SCIRPDC Regional Traded Cluster Job Creation 1998-2012								
Cluster Name	2007	2008	2009	2010	2011	2012	98-12 Change	98-12 % Change
Automotive	3555	2625	2190	2180	2705	2755	440	19%
Lighting and Electrical Equipment	30	30	20	30	30	30	-540	-95%
Wood Products	1090	1010	625	595	645	544	-181	-25%
Food Processing and Manufac.	845	874	1239	954	980	1000	139	16%
Furniture	490	420	420	420	420	360	5	1%
Electric Power Gener. and Trans.	0	0	0	0	0	0	-175	-100%
Distrib. And Electronic Commerce	2499	2677	2575	2605	2504	2590	402	18%
Construction Prod. and Services	330	533	485	410	403	595	361	154%
Business Services	1024	960	1059	871	997	1095	306	39%
Upstream Metal Manufacturing	470	235	235	410	410	410	230	128%
Education and Knowledge Creation	40	40	40	40	50	50	20	67%
Financial Services	391	390	460	381	391	384	14	4%
Plastics	1095	720	720	510	510	510	-2600	-84%
Textile Manufacturing	0	0	0	0	0	0	-60	-100%
Communications Equip. and Serv.	20	50	50	50	50	80	70	700%
Coal Mining	0	0	0	10	10	10	0	0%
Vulcanized and Fired Metals	10	10	10	10	10	10	0	0%
Forestry	10	10	20	30	30	30	-60	-67%
Insurance Services	140	130	110	110	100	100	-40	-29%
Video Production and Distribution	10	10	10	10	10	0	-20	-100%
Downstream Metal Products	0	80	235	90	0	20	20	100%
Downstream Chemical Products	195	195	195	195	195	195	10	5%
Environmental Services	30	30	40	40	30	50	30	150%
Nonmetal Mining	20	10	10	10	10	10	0	0%
Leather and Related Products	70	60	70	70	70	80	10	14%
Medical Devices	10	10	10	10	10	185	175	1650%
Music and Sound Recording	10	10	0	0	0	0	-10	-100%
Metal Mining	0	0	0	0	0	0	-10	-100%
Performing Arts	50	225	225	50	100	100	70	233%
Hospitality and Tourism	771	925	1006	878	785	753	-103	-12%
Agricultural Inputs and Services	30	50	70	70	70	90	10	13%
Paper and Packaging	185	185	185	185	185	185	-180	-49%
Oil and Gas Production and Trans.	764	677	576	622	636	757	108	17%
Jewelry and Precious Metals	10	10	10	10	0	0	0	0%
Livestock Processing	50	50	50	60	110	110	0	0%
Inform. Tech. and Analy. Instrum.	130	295	120	70	185	60	-90	-60%
Apparel	30	10	0	0	20	0	-410	-100%
Metalworking Technology	265	420	410	295	590	415	-50	-11%
Transportation and Logistics	794	790	547	493	647	452	-418	-48%
Marketing, Design, and Publishing	170	220	218	220	230	220	-995	-82%
Recreation. and Small Elect. Goods	185	175	185	185	185	205	-415	-67%
Printing Services	1657	1599	1376	2030	1953	2000	-1260	-39%
Prod. Tech. and Heavy Machinery	1050	670	795	620	745	900	-1575	-64%
Footwear	0	0	0	0	0	0	0	0%
Upstream Chemical Products	10	10	0	0	0	0	0	0%
Trailers, Motor Homes, and Applia.	0	0	0	10	0	10	10	100%
SCIRPDC Totals	18535	17430	16601	15839	17011	17350	-6762	-28%

Source: U.S. Cluster Mapping

Appendix B

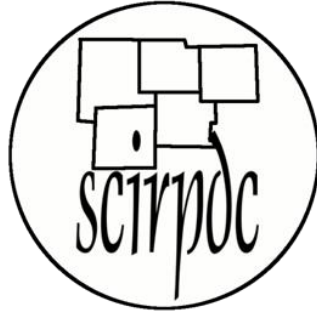
SCIRPDC Regional Local Cluster Job Creation 1998-2012									
Cluster Name	1998	1999	2000	2001	2002	2003	2004	2005	2006
Local Education and Training	275	450	450	660	660	470	720	510	460
Local Real Estate, Const., and Devel.	3199	3311	3462	3380	3634	3553	3672	3771	3801
Local Logistical Services	1325	1416	1448	1355	1297	1484	1030	922	1104
Local Household Goods and Serv.	1039	1088	1059	1011	1070	885	845	911	831
Local Food and Bev. Proc. and Dist.	1986	2030	1897	1920	1752	1838	1651	1662	1865
Local Motor Vehicle Prod. and Serv.	2836	2858	3119	3160	3003	3134	3107	3050	3093
Local Personal Serv. (Non-Medical)	762	779	880	1010	1001	889	868	921	857
Local Retailing (Clothing/Merch.)	1689	1700	1773	1738	1720	1642	1718	1828	1829
Local Health Services	7595	7593	7536	7543	7315	7559	8150	7447	7624
Local Commercial Serv.	1759	1755	2379	1598	1624	1229	1526	1383	1838
Local Entertainment and Media	850	830	844	799	832	871	878	1012	912
Local Financial Services	1342	1315	1322	1382	1367	1424	1346	1380	1324
Local Utilities	680	649	600	630	615	715	787	735	665
Local Industrial Prod. and Serv.	645	505	386	375	485	571	601	537	497
Local Hospitality Establishments	3933	3766	3717	3922	3806	4133	4334	4312	4067
Local Community and Civic Org.	2151	1770	1961	1981	1947	1838	2033	1958	2284
SCIRPDC Totals	32066	31815	32833	32464	32128	32235	33266	32339	33051

Source: U.S. Cluster Mapping

Appendix B Cont.

SCIRPDC Regional Local Cluster Job Creation 1998-2012 Cont.								
Cluster Name	2007	2008	2009	2010	2011	2012	98-12 Change	98-12 % Change
Local Education and Training	570	550	550	490	440	355	80	29%
Local Real Estate, Const., and Devel.	3532	3575	3418	3316	3211	3386	187	6%
Local Logistical Services	1215	1098	1173	1172	1398	1413	88	7%
Local Household Goods and Serv.	845	901	915	694	740	643	-396	-38%
Local Food and Bev. Proc. and Dist.	1680	1631	1437	1448	1496	1407	-579	-29%
Local Motor Vehicle Prod. and Serv.	2882	2902	2686	2903	3040	3178	342	12%
Local Personal Serv. (Non-Medical)	705	781	834	693	724	784	22	3%
Local Retailing (Clothing/Merch.)	2042	2148	2066	2074	2107	2049	353	21%
Local Health Services	7069	6077	7041	7233	7251	7468	-526	7%
Local Commercial Serv.	1869	2177	2112	2073	1724	1419	-340	-19%
Local Entertainment and Media	709	628	557	622	521	523	-327	-39%
Local Financial Services	1248	1146	1168	1100	1184	1122	-220	-16%
Local Utilities	705	567	796	799	590	615	-65	10%
Local Industrial Prod. and Serv.	513	260	252	368	426	797	152	24%
Local Hospitality Establishments	4156	4047	3760	3954	3748	4027	94	2%
Local Community and Civic Org.	2235	2177	2112	2240	2271	2082	-69	-3%
SCIRPDC Totals	31975	30665	30877	31179	30871	31268	-798	-3%

Source: U.S. Cluster Mapping



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