

Waukesha County by the Numbers

Using Economic and Demographic Data to Understand
Economic Development Opportunities

2019 Update

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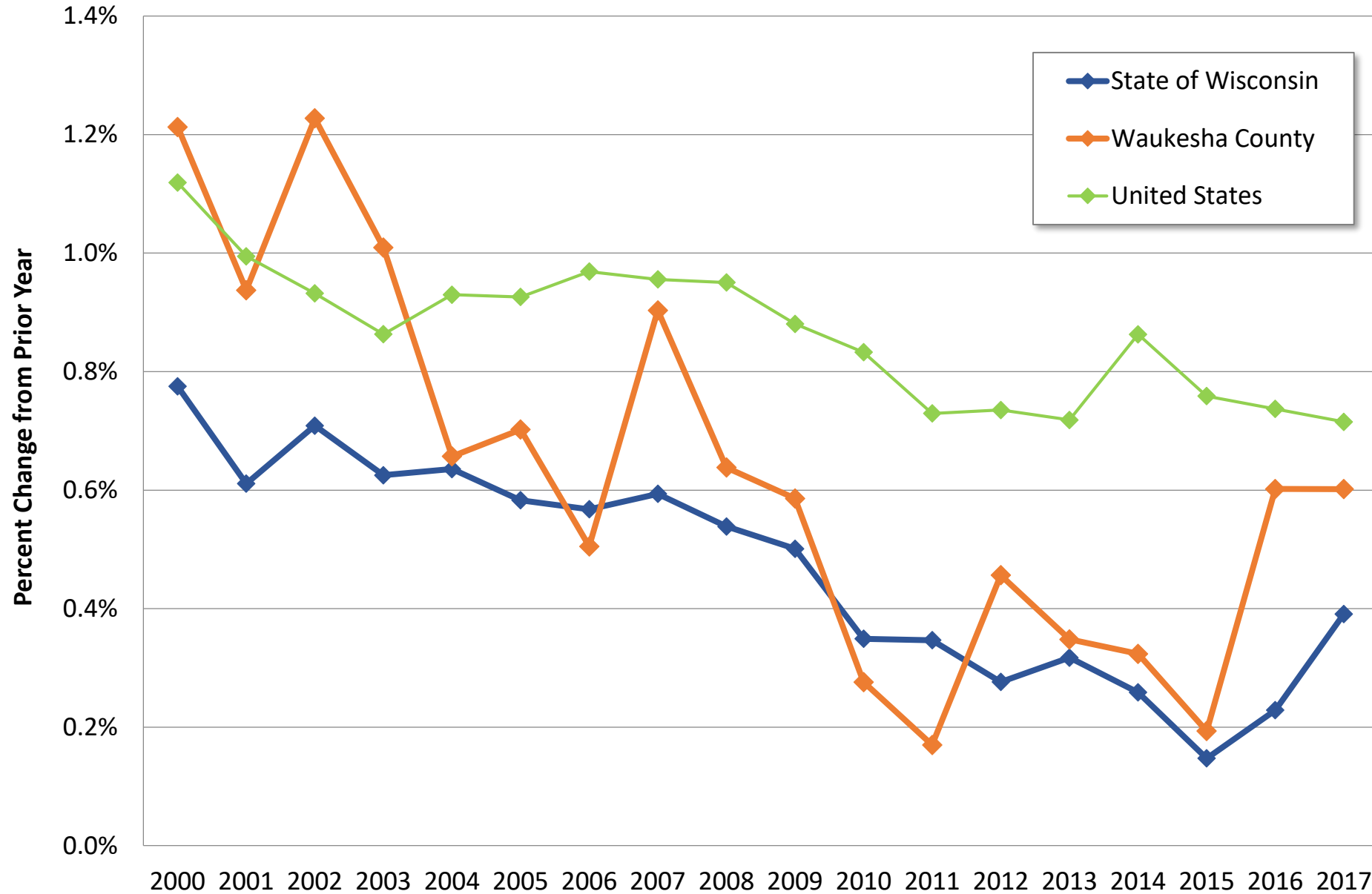


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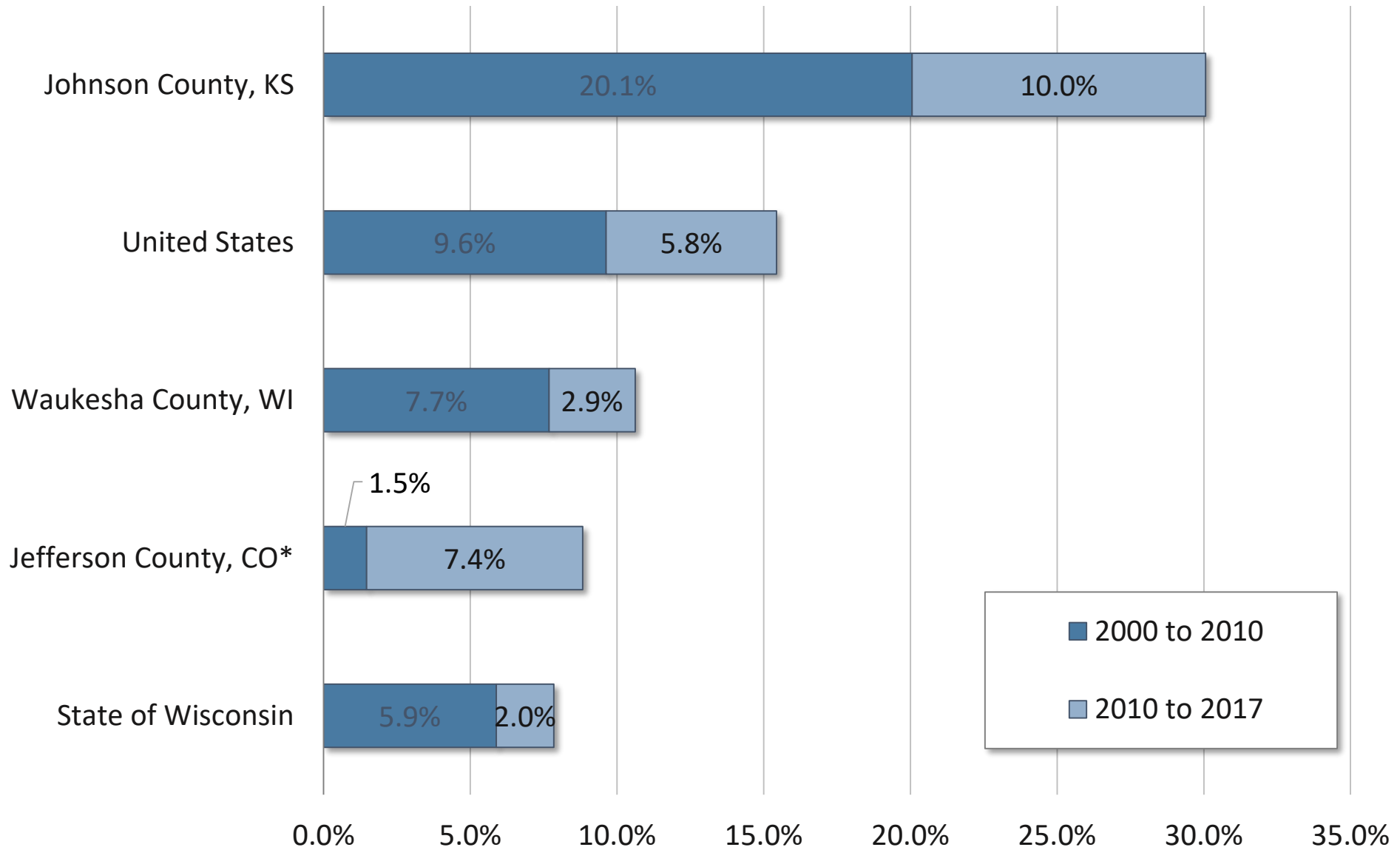
Demographics

Population Trends 2000 to 2017

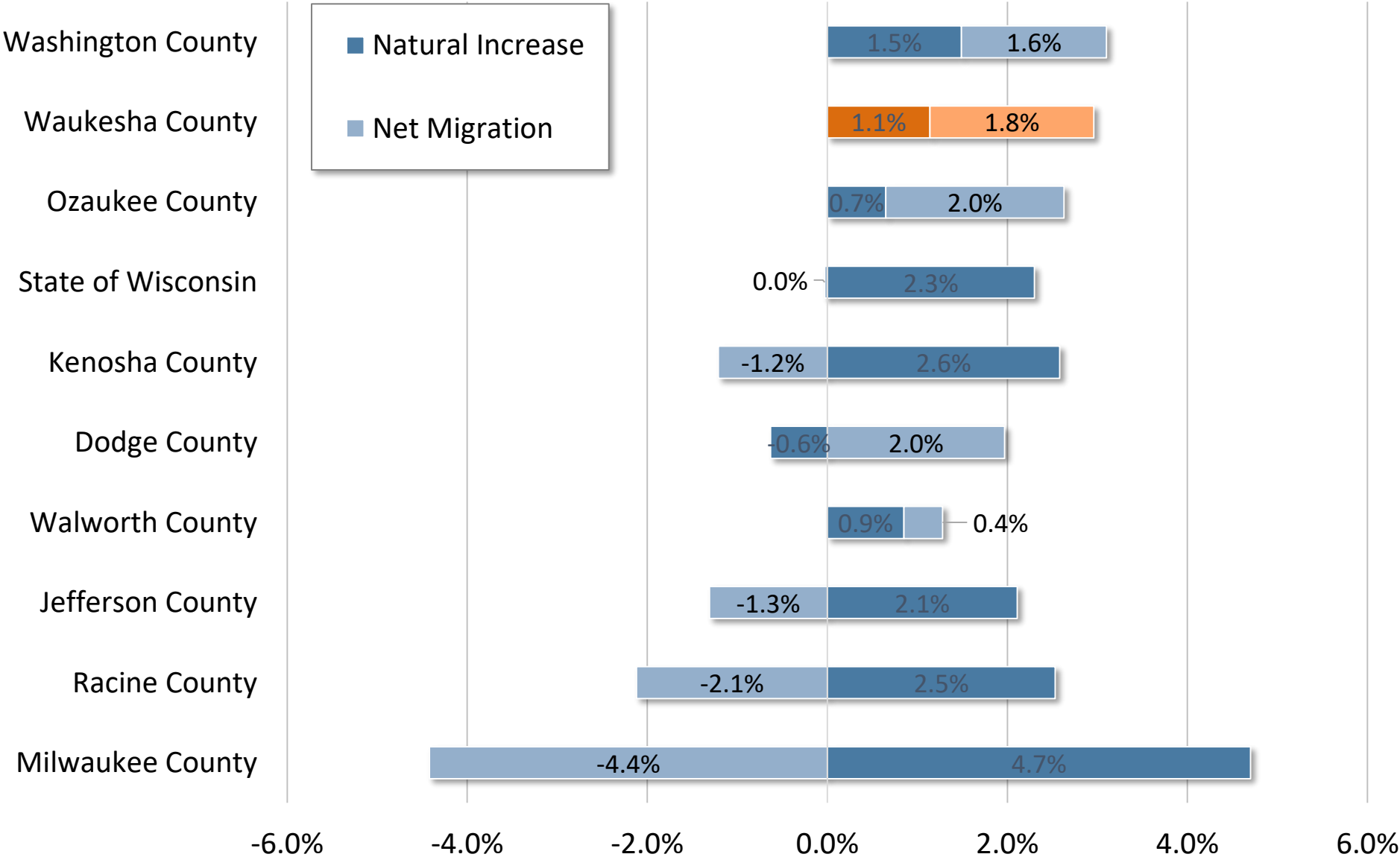
Percent Change in Population from Prior Year



Percent Change in Population – 2000 to 2017

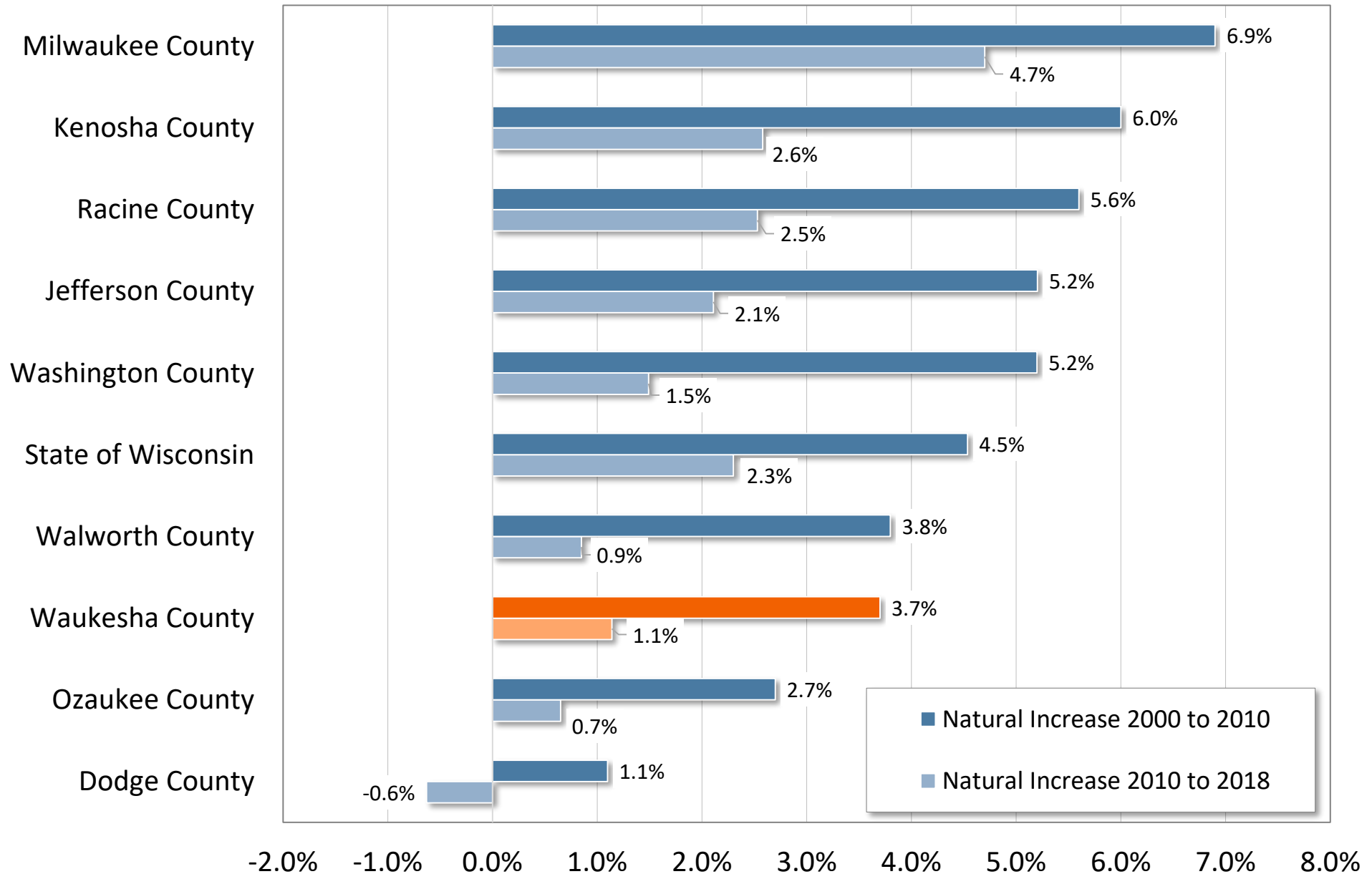


Regional Components of Population Change – 2010 to 2018

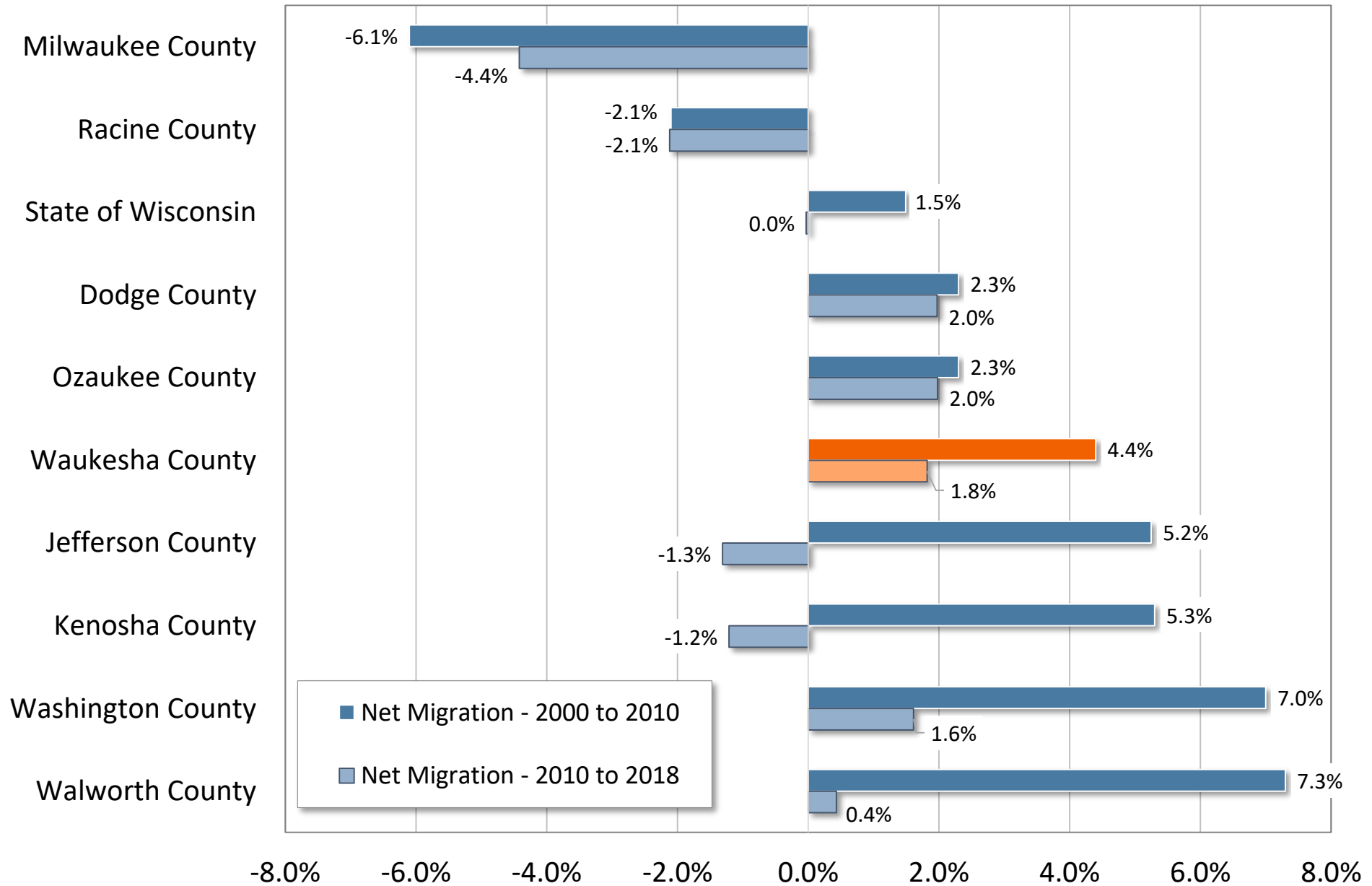


Data Source: U.S. Census Bureau and Wisconsin Department of Administration

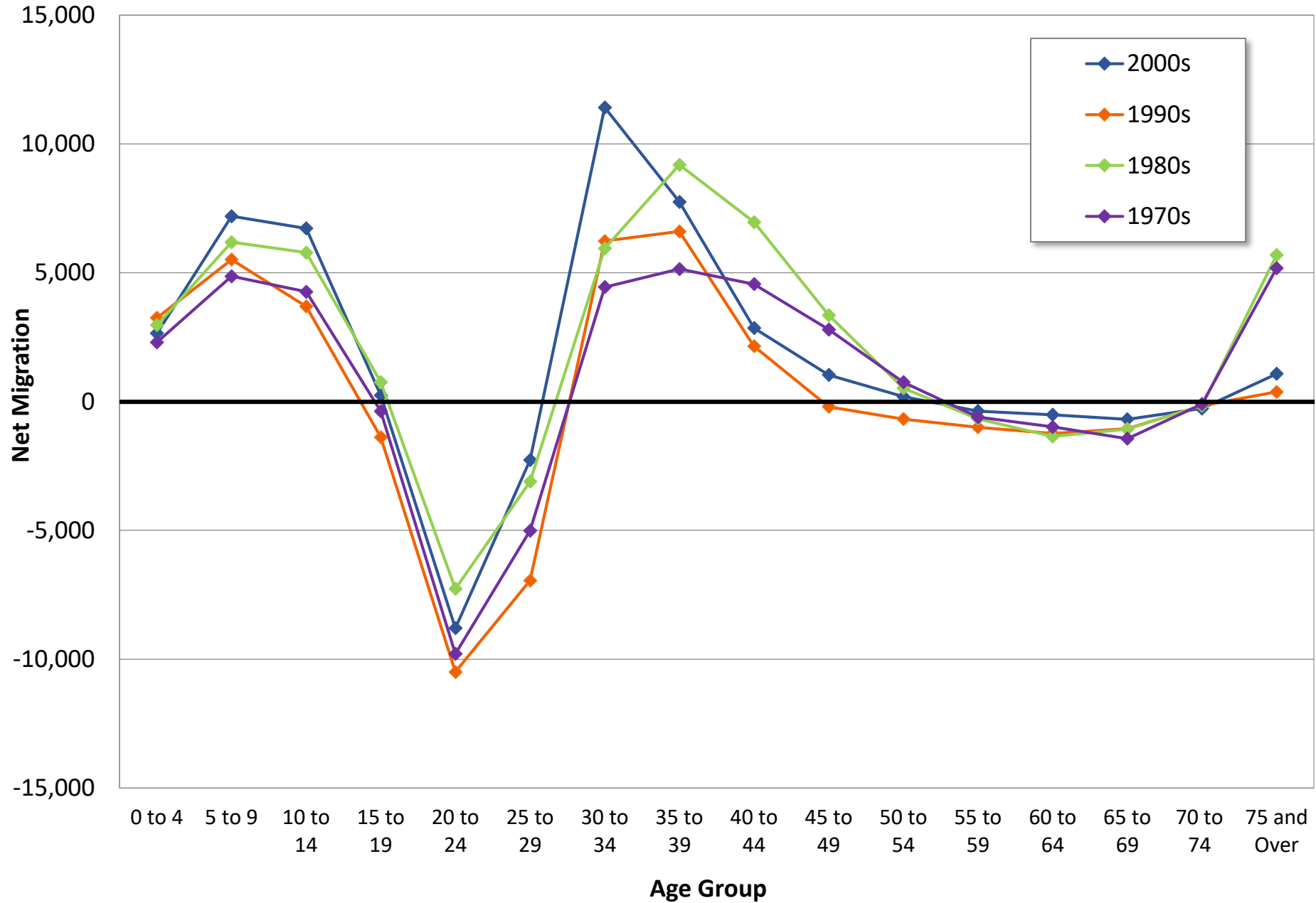
Natural Increase Comparison – 2000 to 2010 and 2010 to 2018



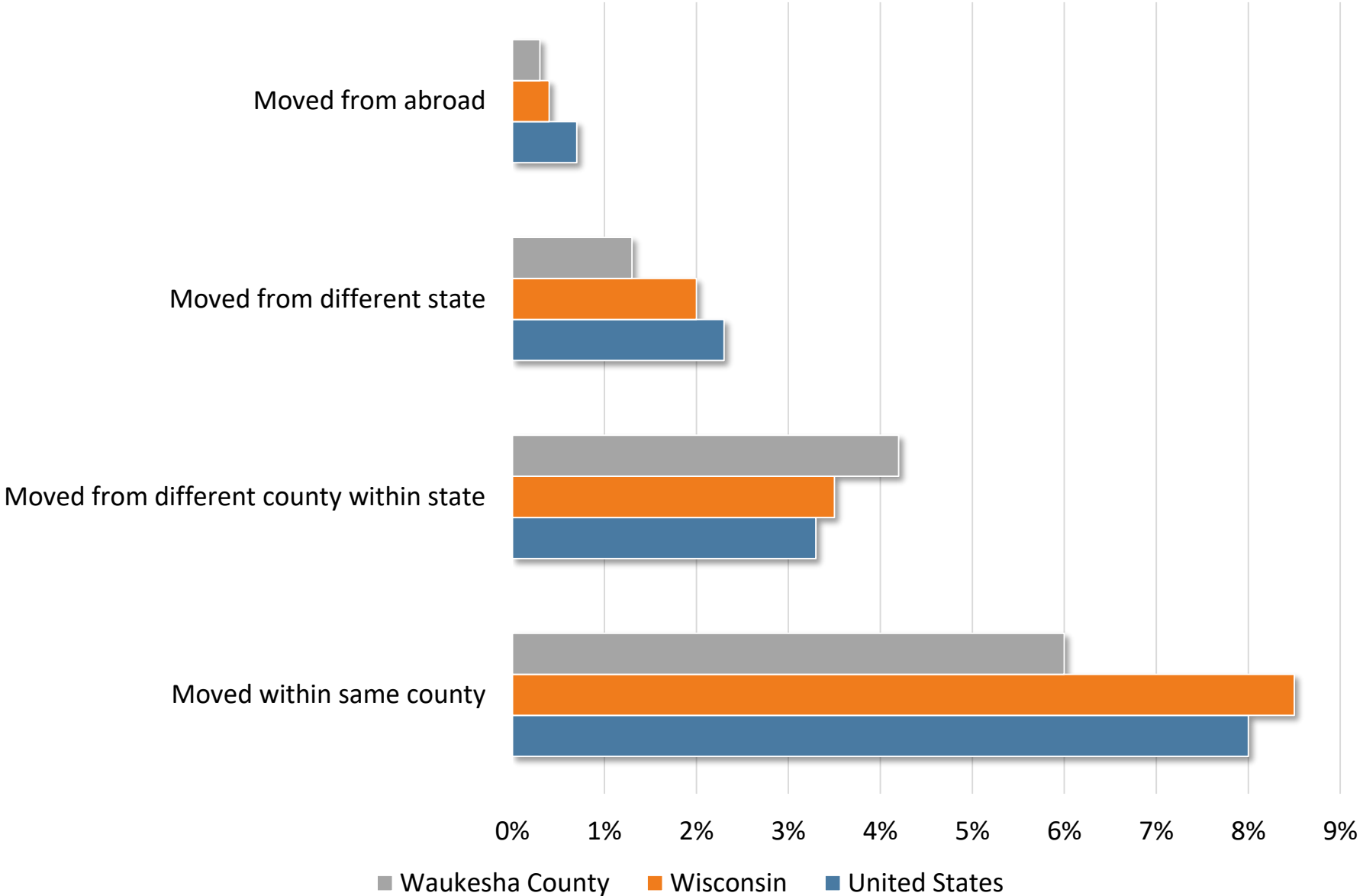
Net Migration Comparison – 2000 to 2010 and 2010 to 2018



Waukesha County Net Migration by Age

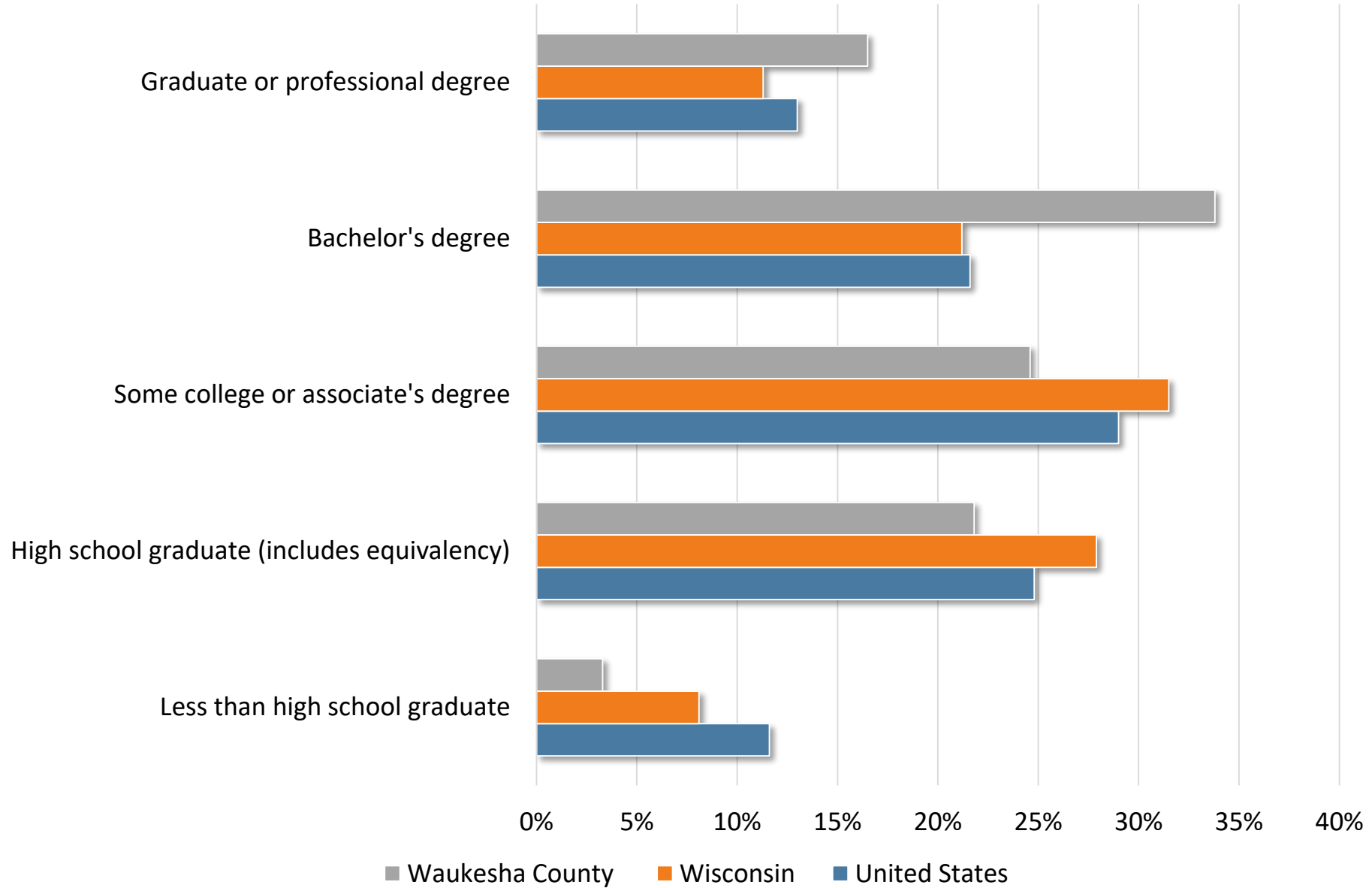


Geographical Mobility of Movers in 2017

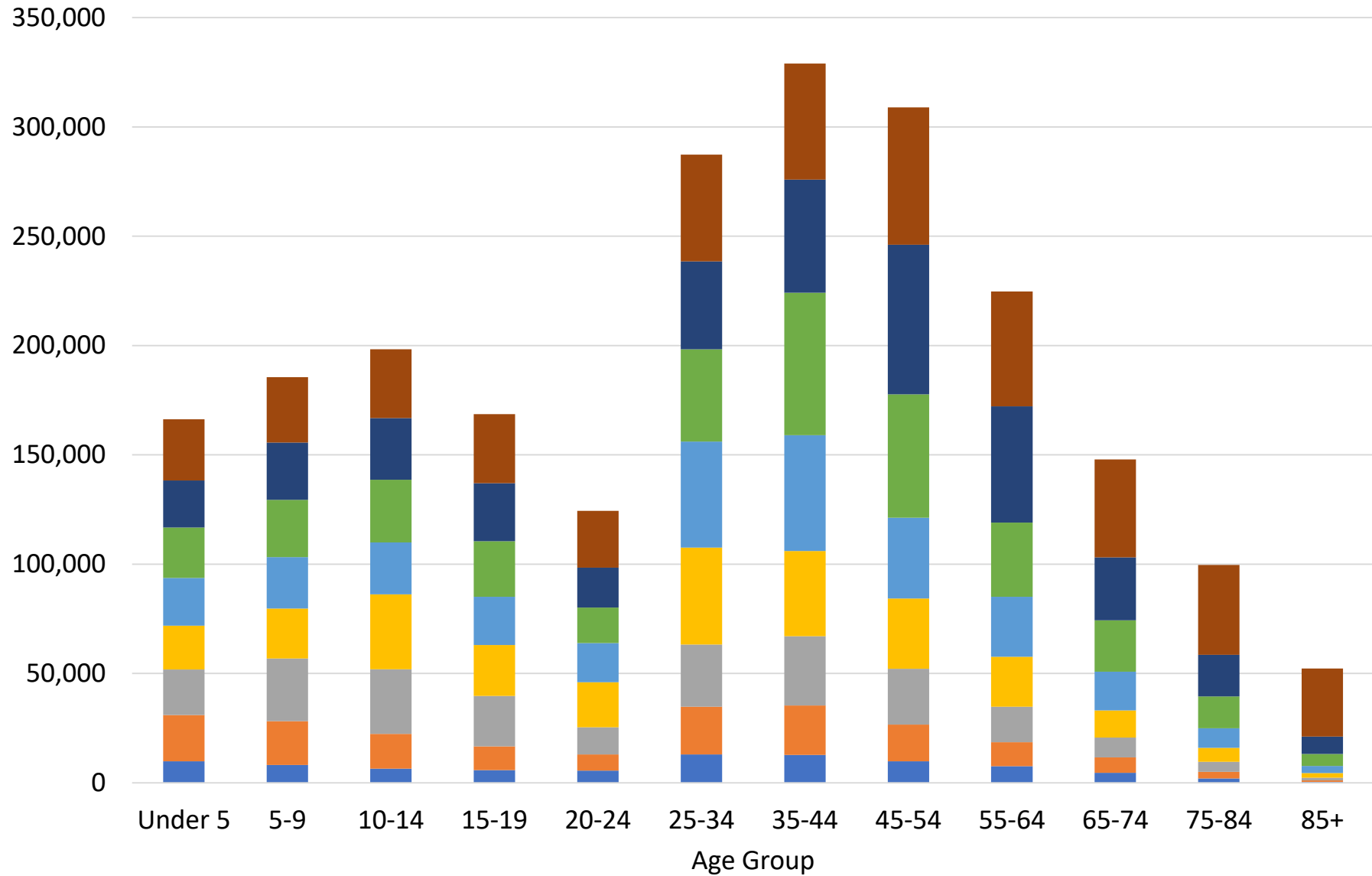


Source: U.S. Census Bureau American Community Survey and SEWRPC

Educational Attainment of Movers in 2017

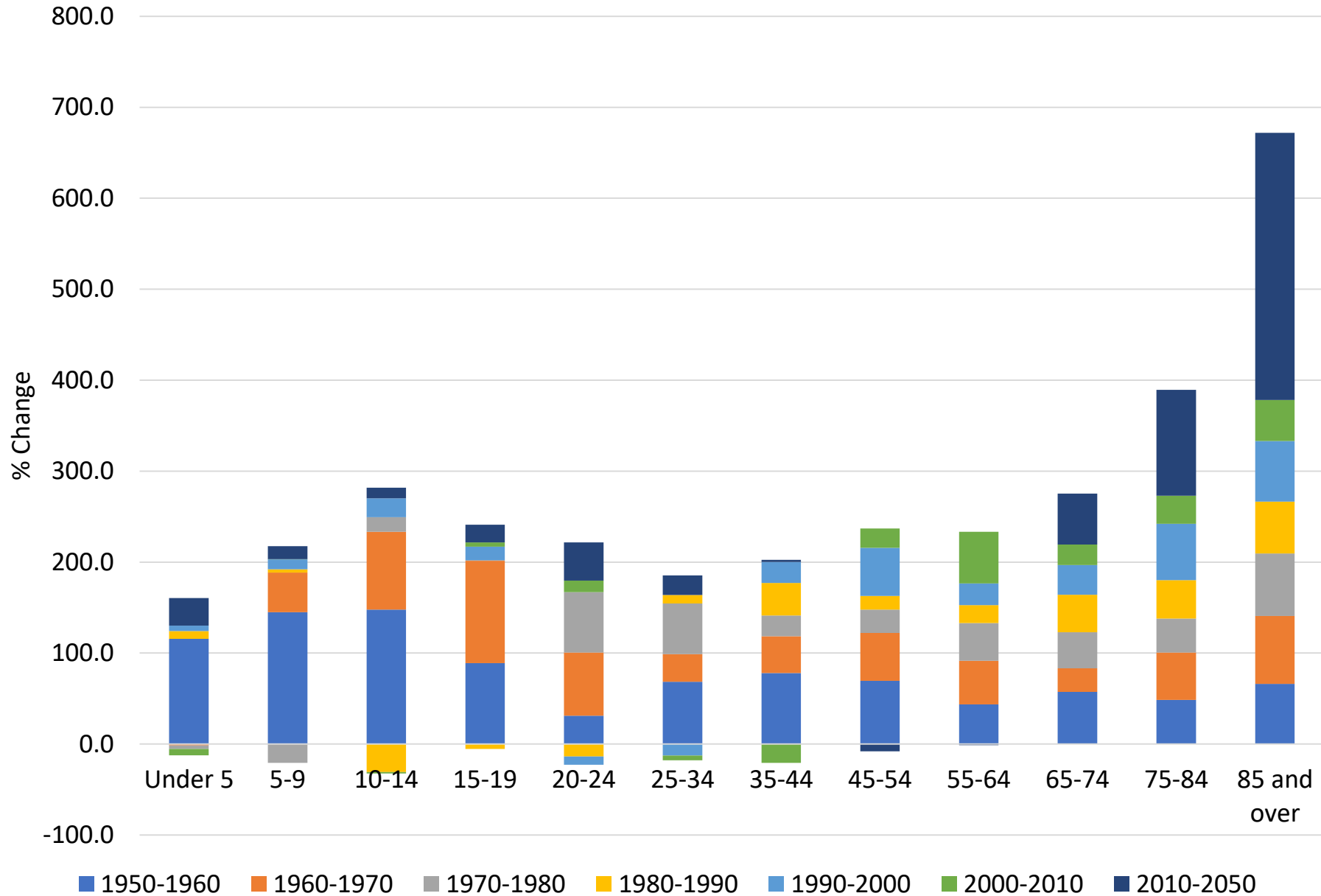


Population by Age Group from 1950-2050



■ 1950
 ■ 1960
 ■ 1970
 ■ 1980
 ■ 1990
 ■ 2000
 ■ 2010
 ■ 2050

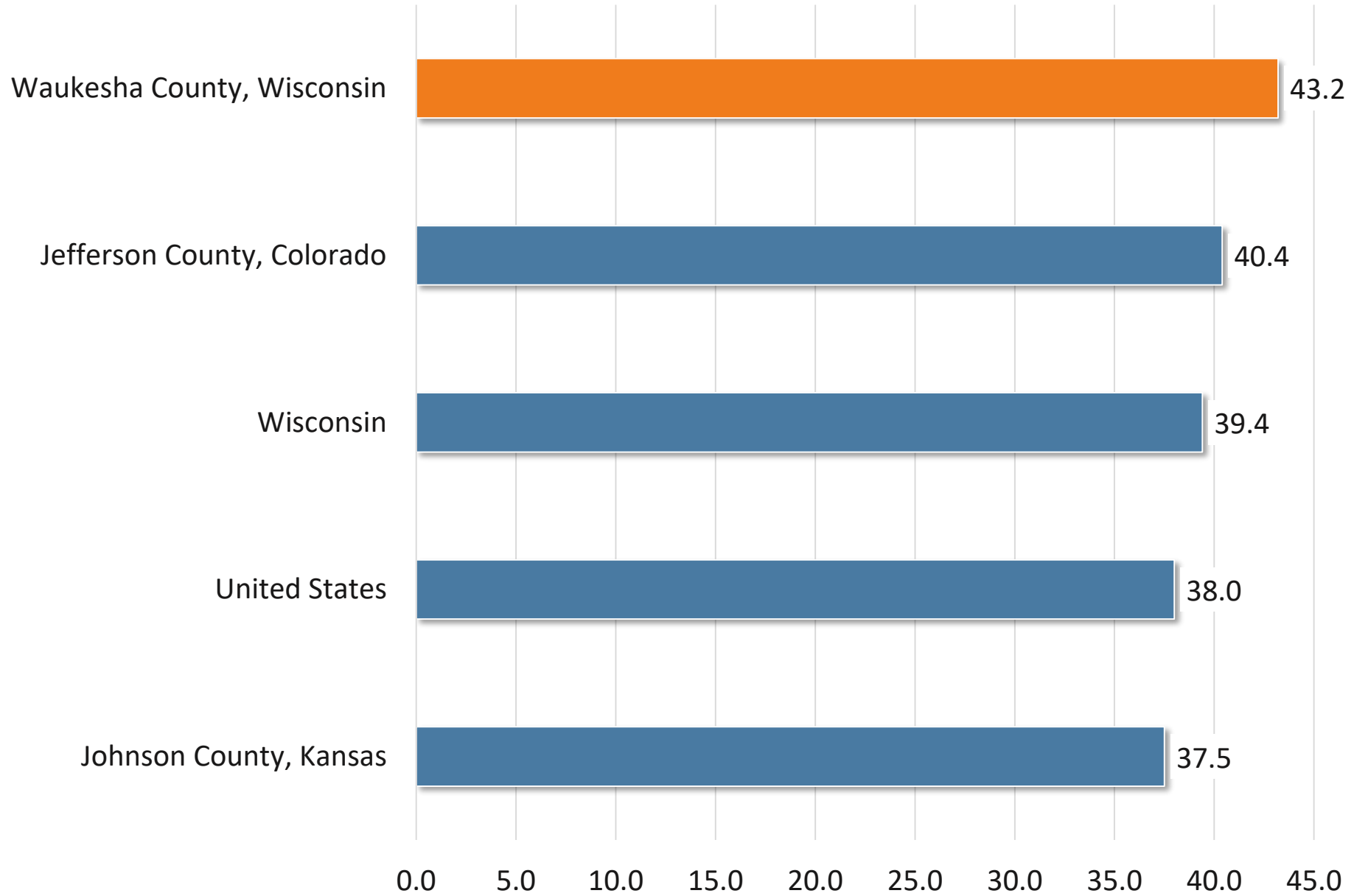
% of Population Growth by Age Group from 1950-2050



Waukesha County Age Distribution Comparison – 2010 Census to 2030 Projection

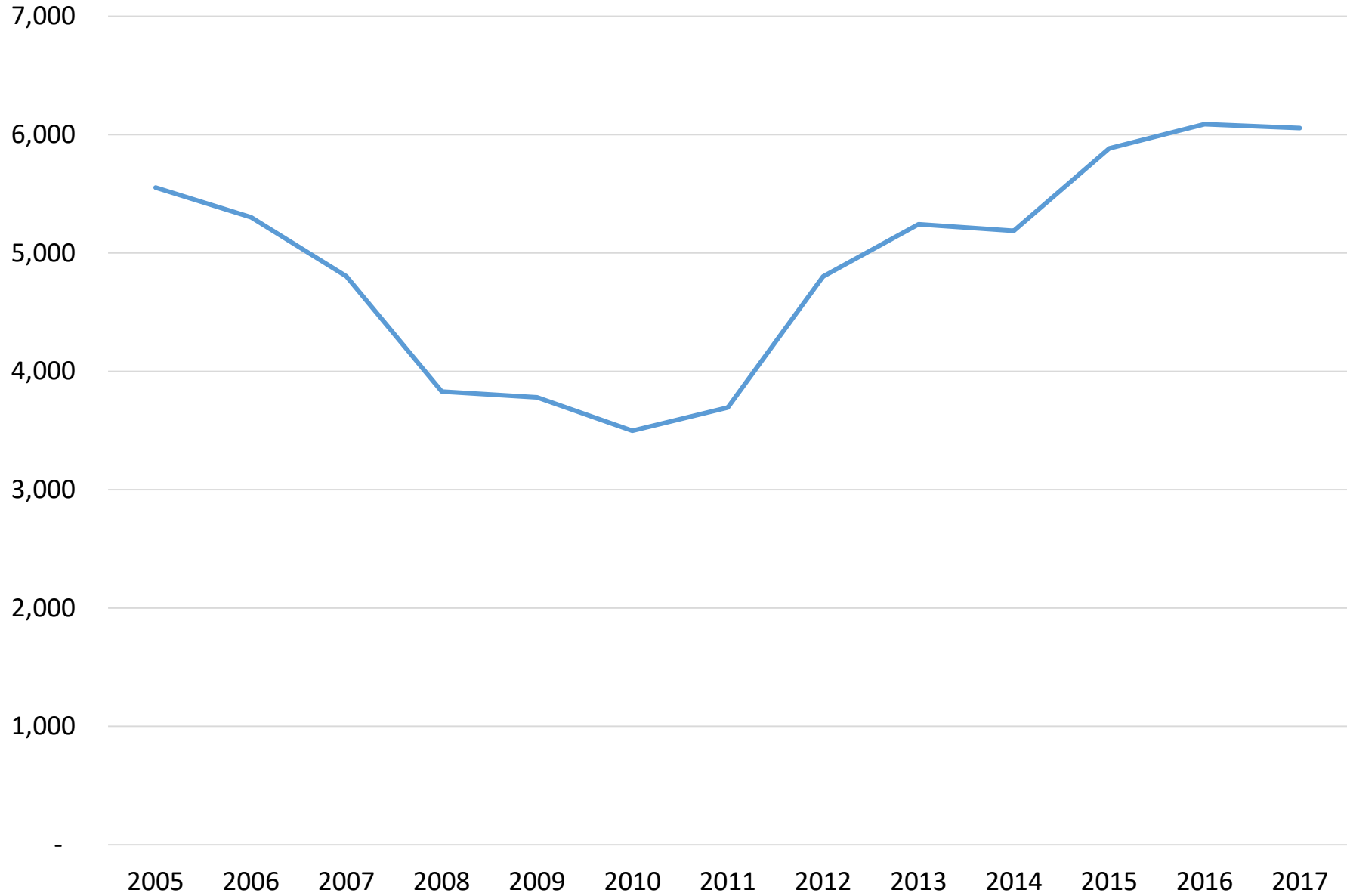
<u>Age Group</u>	<u>Waukesha County 2010</u>	<u>Waukesha County 2030</u>
Age 25 to 54	41.1%	35.7%
Age 15 to 64	66.3%	57.6%
Total Population	389,891	451,470
Under Age 5	5.5%	5.5%
Age 5 to 14	14.0%	12.4%
Age 15 to 24	11.5%	10.2%
Age 25 to 34	10.3%	11.0%
Age 35 to 44	13.3%	12.6%
Age 45 to 54	17.5%	12.0%
Age 55 to 64	13.6%	11.7%
Age 65 to 74	7.4%	12.7%
Age 75 to 84	14.3% = 4.9%	24.6% = 8.4%
Age 85 or More	2.0%	3.5%

Median Age in 2017

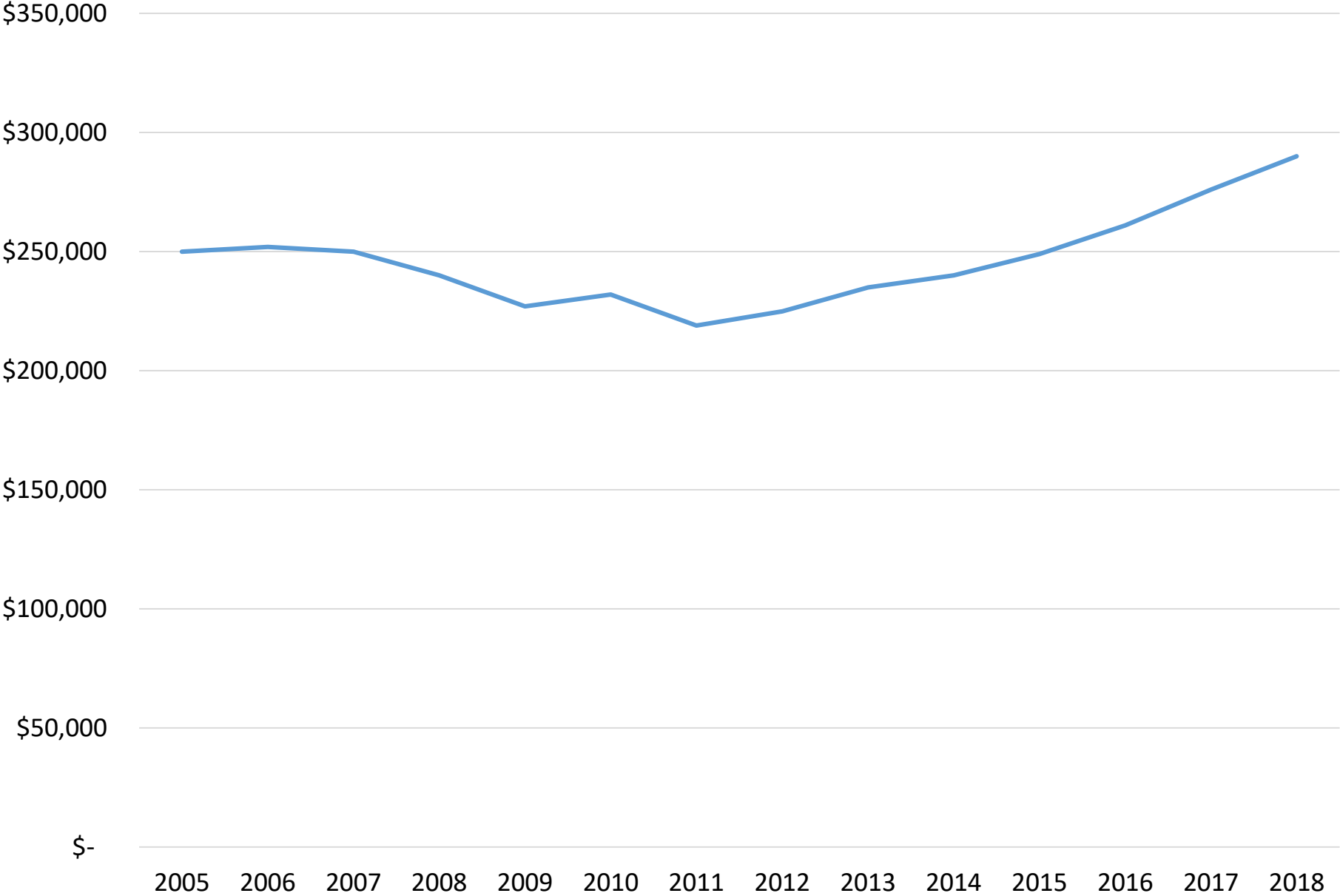


Tenure by Age of Householder in Waukesha County			
	2007	2012	2017
Owner occupied			
Householder 15 to 24 years	984	299	338
Householder 25 to 34 years	10,671	8,661	9,108
Householder 35 to 44 years	22,333	20,748	19,749
Householder 45 to 54 years	32,775	29,439	26,146
Householder 55 to 59 years	12,956	14,929	14,561
Householder 60 to 64 years	10,564	13,435	15,144
Householder 65 to 74 years	14,226	15,720	20,982
Householder 75 to 84 years	7,854	9,706	11,291
Householder 85 years and over	1,779	3,176	2,813
Owner Subtotal	114,142	116,113	120,132
Renter occupied			
Householder 15 to 24 years	5,351	3,229	3,350
Householder 25 to 34 years	7,710	9,563	10,461
Householder 35 to 44 years	5,015	5,419	5,981
Householder 45 to 54 years	4,855	5,808	5,110
Householder 55 to 59 years	2,086	3,175	2,921
Householder 60 to 64 years	1,234	2,602	2,147
Householder 65 to 74 years	2,441	2,780	3,853
Householder 75 to 84 years	2,962	2,702	2,920
Householder 85 years and over	1,994	2,798	2,638
Renter Subtotal	33,648	38,076	39,381
Total	147,790	154,189	159,513

Number of Home Sales in Waukesha County

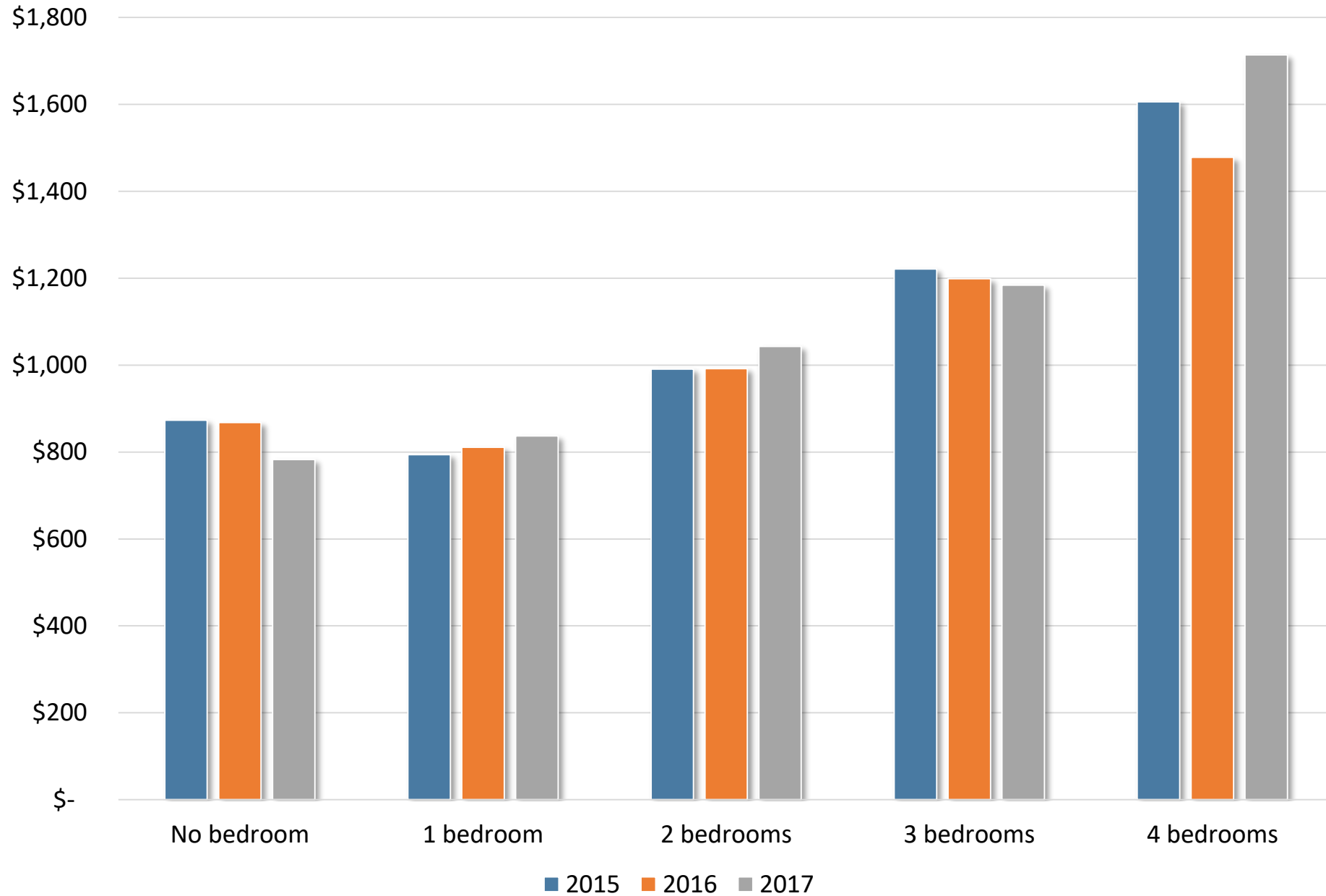


Median Home Sale Price in Waukesha County



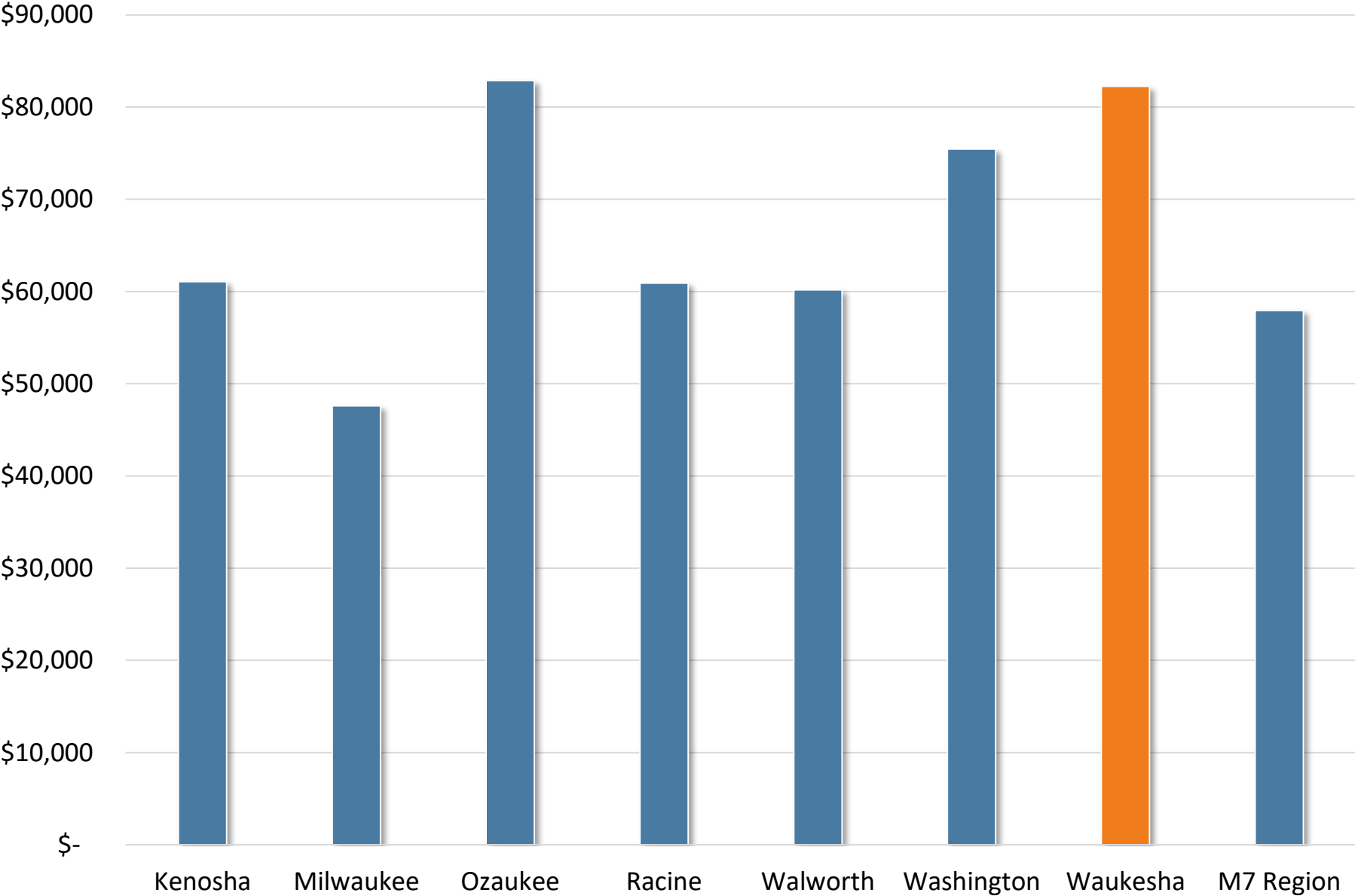
Source: Wisconsin Realtors Association

Median Gross Rent in Waukesha County



Source: U.S. Census Bureau American Community Survey. Note: This question was first asked in 2015.

Median household income

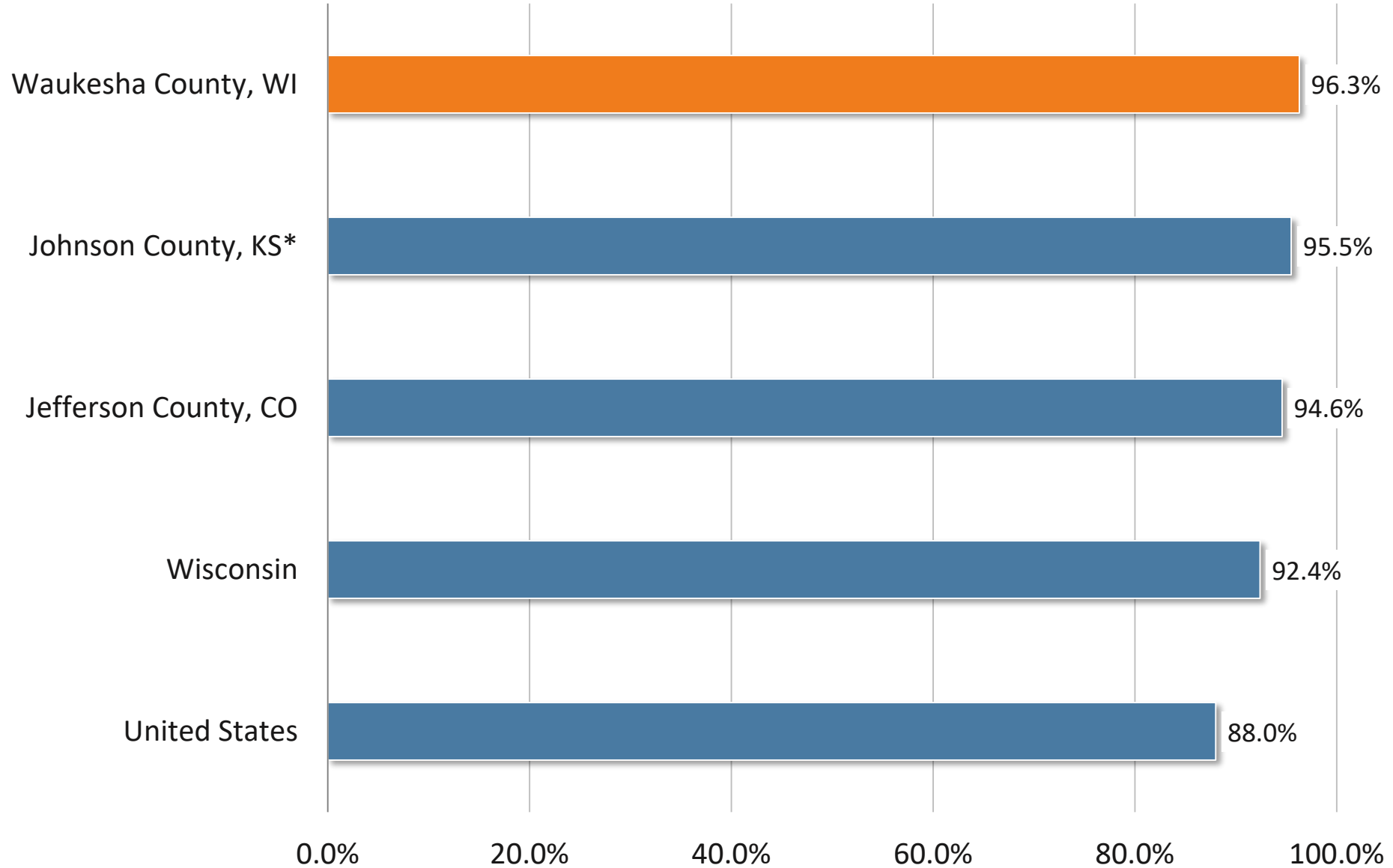


Source: U.S. Census Bureau American Community Survey and SEWRPC

Educational Attainment for the Population Age 25 and Over 2017 1-Year Estimates

Highest Level of Educational Attainment	Waukesha County	State of Wisconsin	United States
Less than 9th grade	1.2%	2.6%	5.1%
9th to 12th grade, no diploma	2.5%	5.1%	6.9%
High school graduate (includes equivalency)	22.6%	30.7%	27.1%
Some college, no degree	18.8%	20.3%	20.4%
Associate's degree	9.4%	10.9%	8.5%
Bachelor's degree	30.4%	19.8%	19.7%
Graduate or professional degree	15.1%	10.6%	12.3%
High school graduate or higher	96.3%	92.4%	88.0%
Associate's Degree or Higher	54.9%	41.3%	40.5%
Bachelor's degree or higher	45.5%	30.4%	32.0%

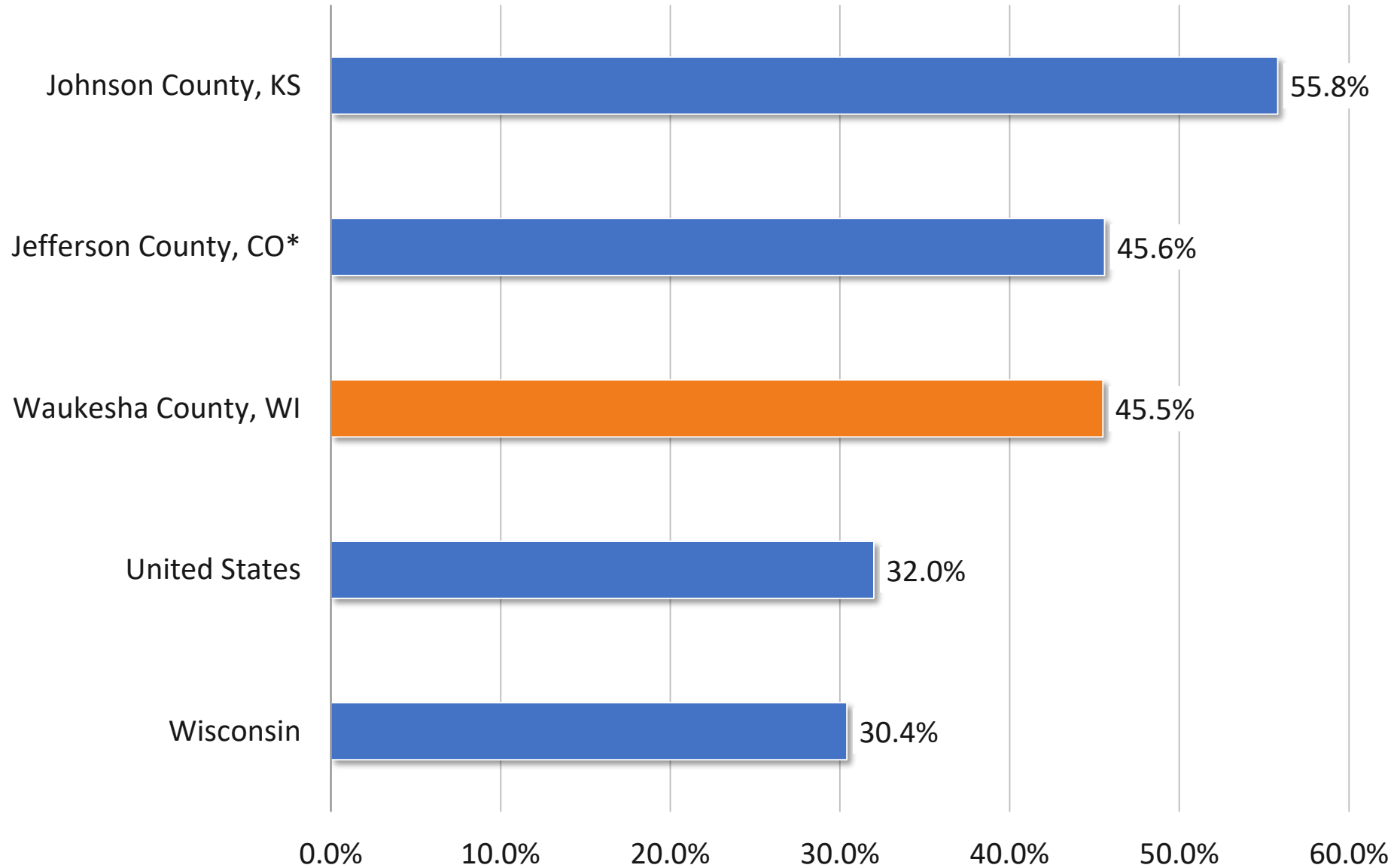
Percent of Residents Age 25 and Over with a High School Degree or Higher (2017 1-Year Estimates)



Data Source: U.S. Census Bureau 2017 American Community Survey

* Value not statistically different from Waukesha County at the 90% level.

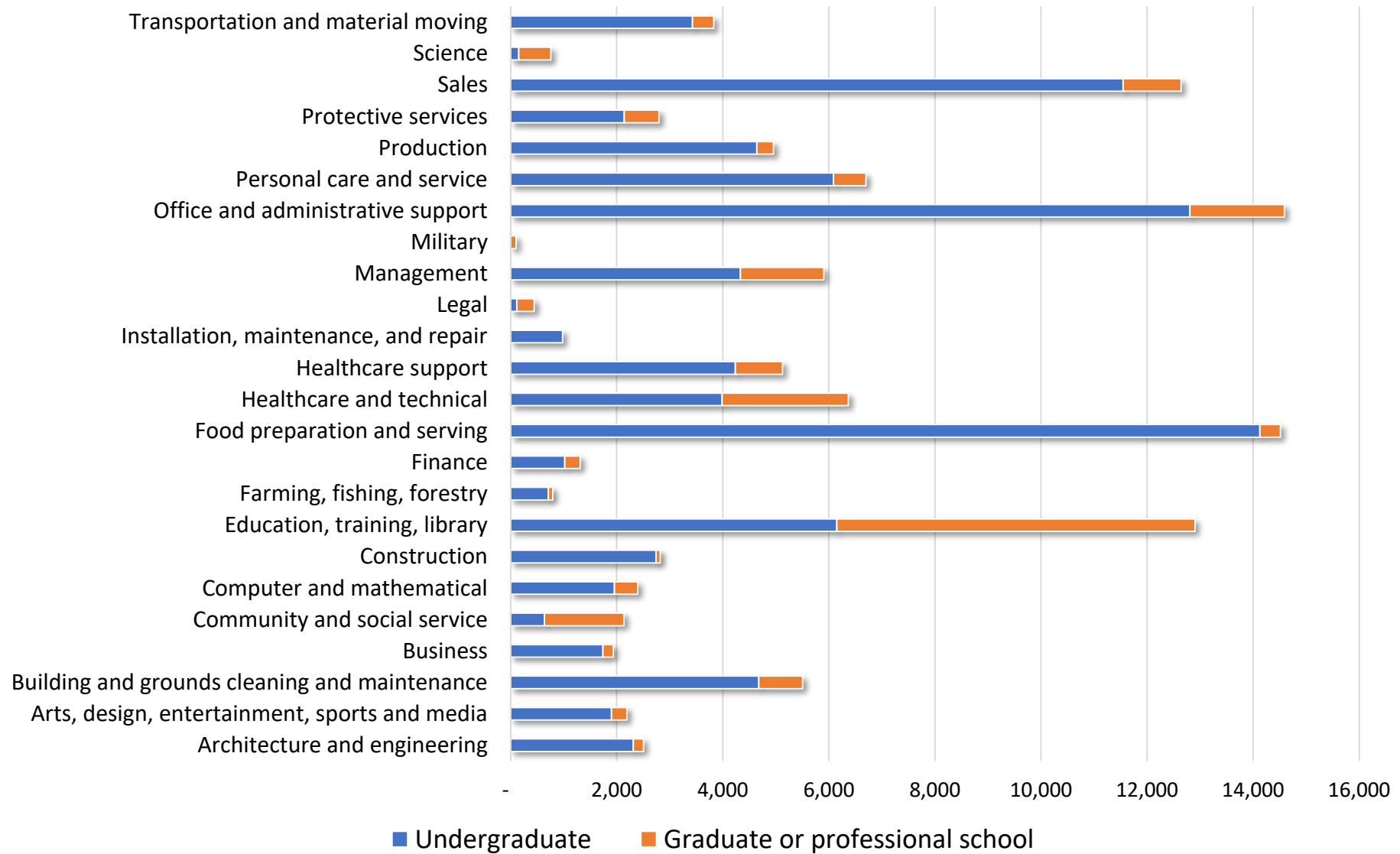
Percent of Residents Age 25 and Over with a Bachelor's Degree or Higher (2017 1-Year Estimates)



Data Source: U.S. Census Bureau 2017 American Community Survey

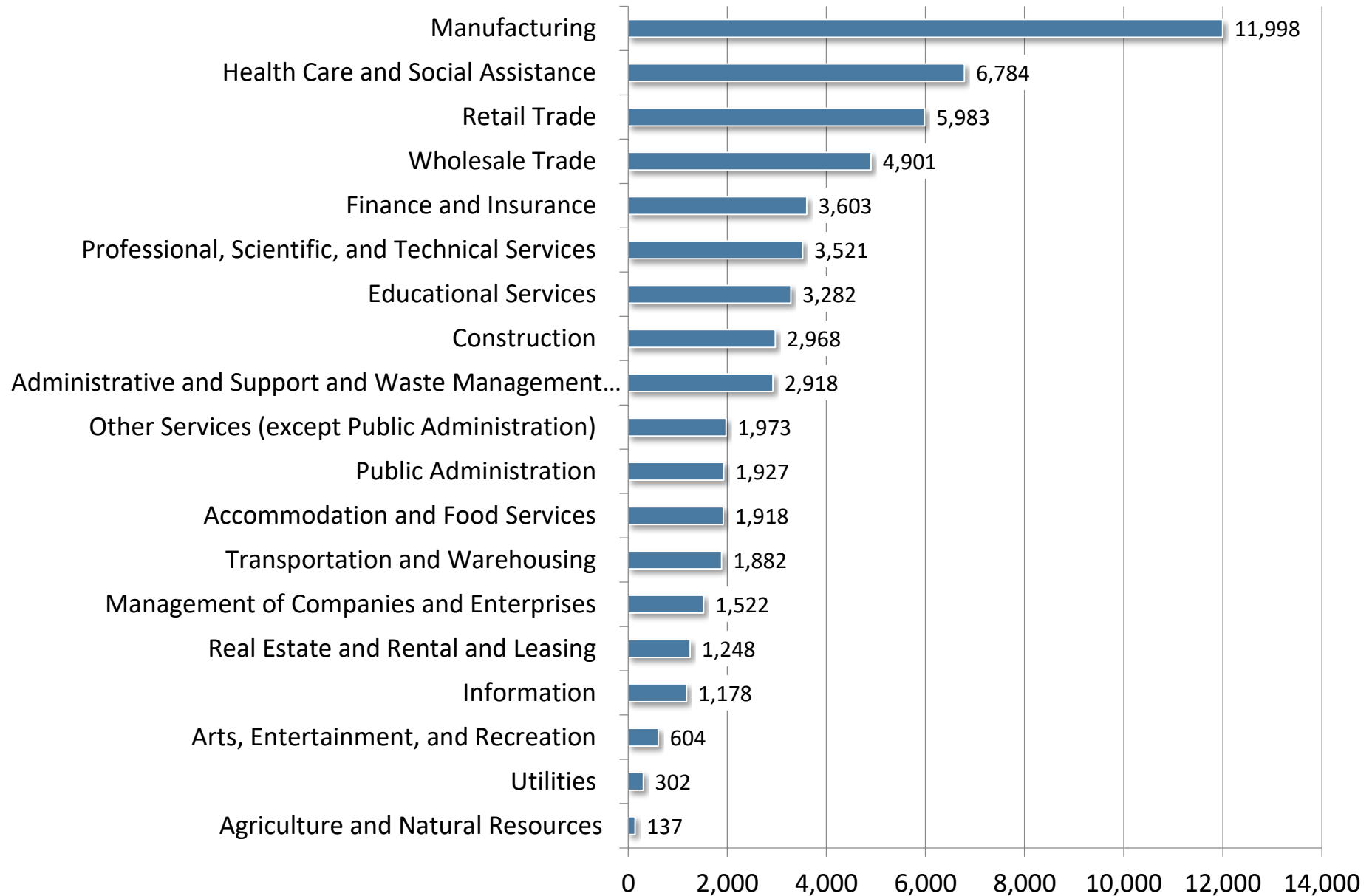
* Value not statistically different from Waukesha County at the 90% level.

Post-Secondary School Enrollment by Occupation in the M7 Region in 2017

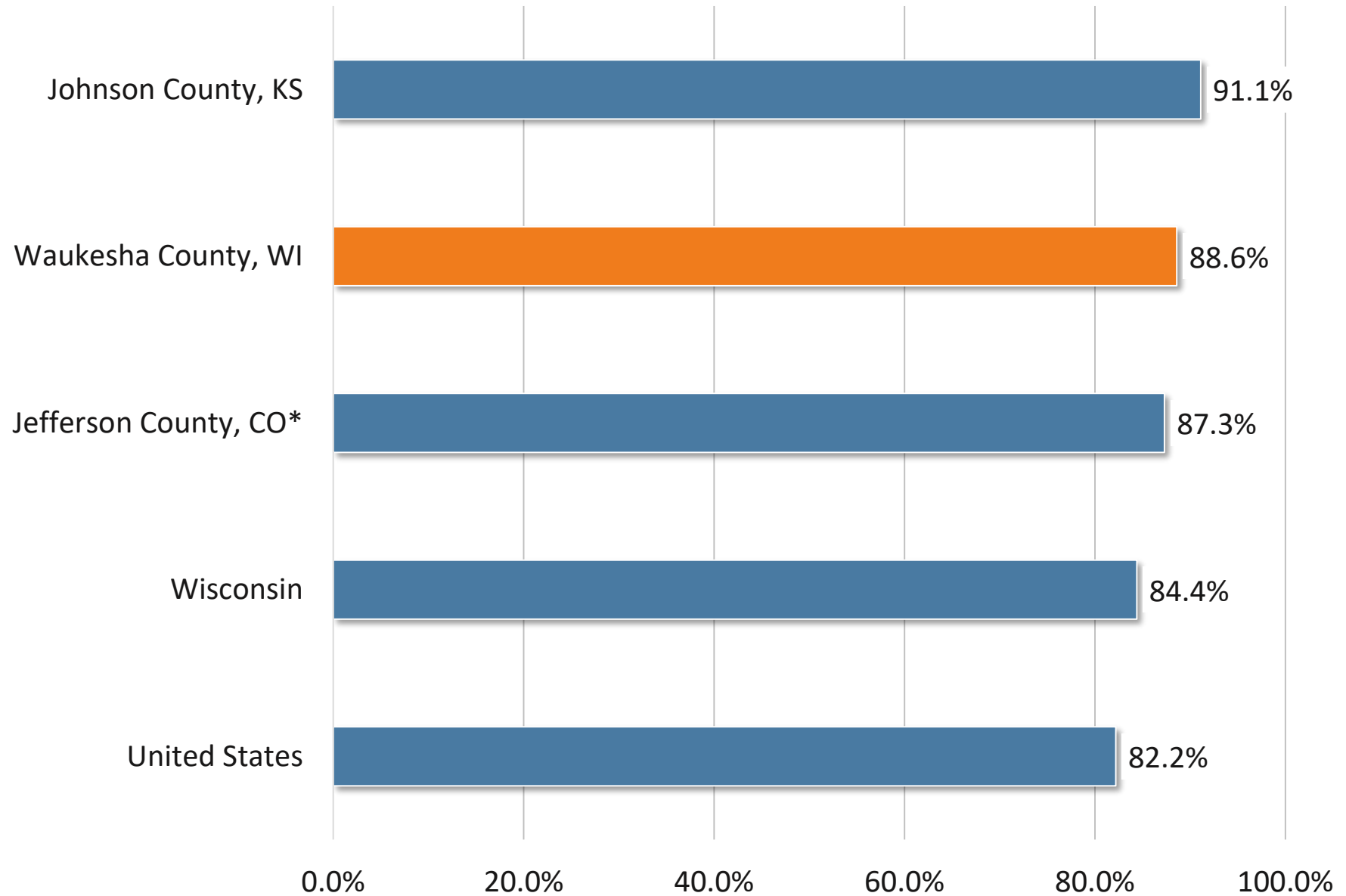


Labor Force and Employment

Waukesha County Employment by Sector – Total Number of Employees Age 55 and Over (Q2 2017)



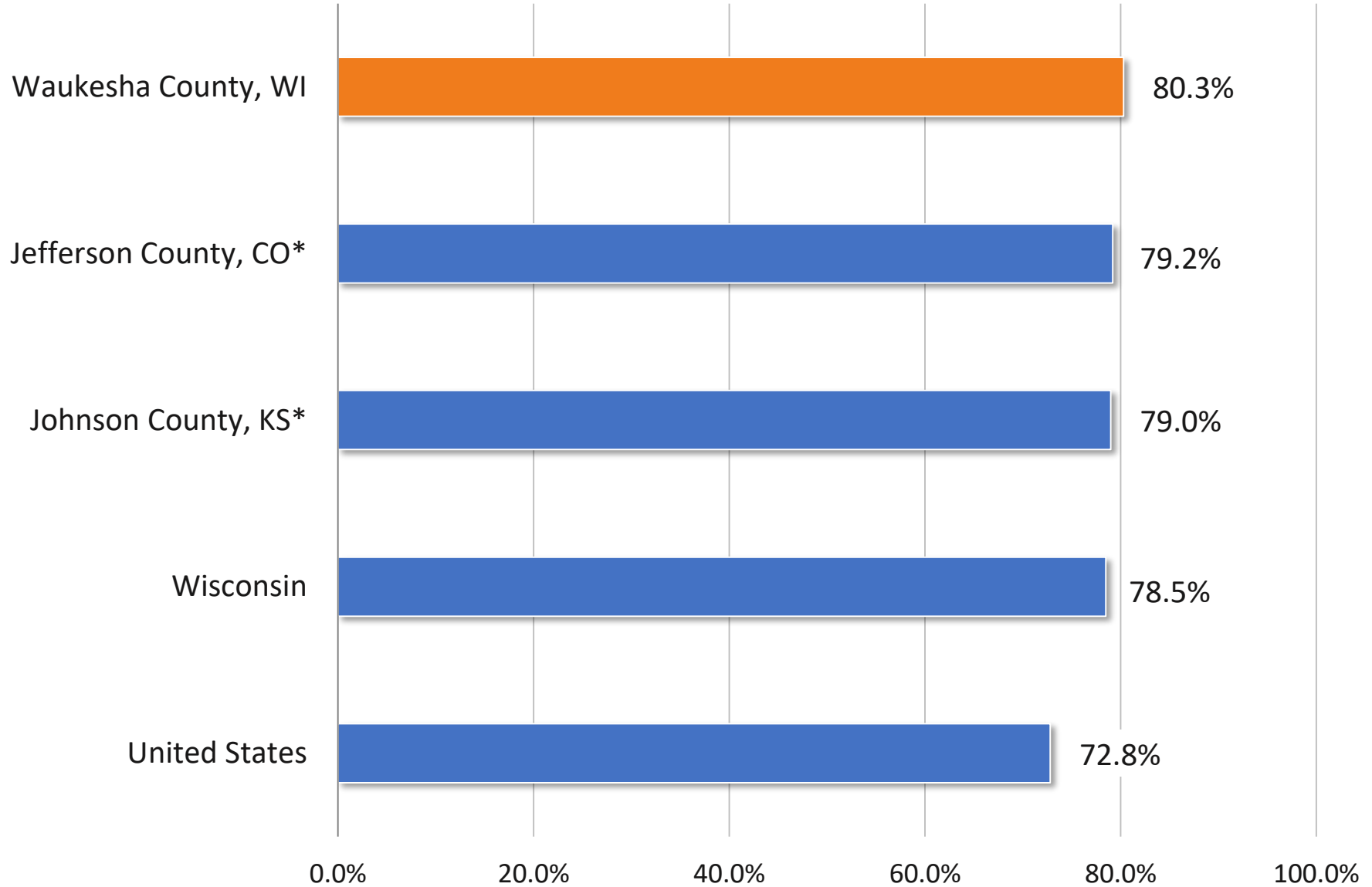
Labor Participation Rate for Males ages 20 to 64 years (2017 1-Year Estimates)



Data Source: U.S. Census Bureau 2017 American Community Survey

* Value not statistically different from Waukesha County at the 90% level.

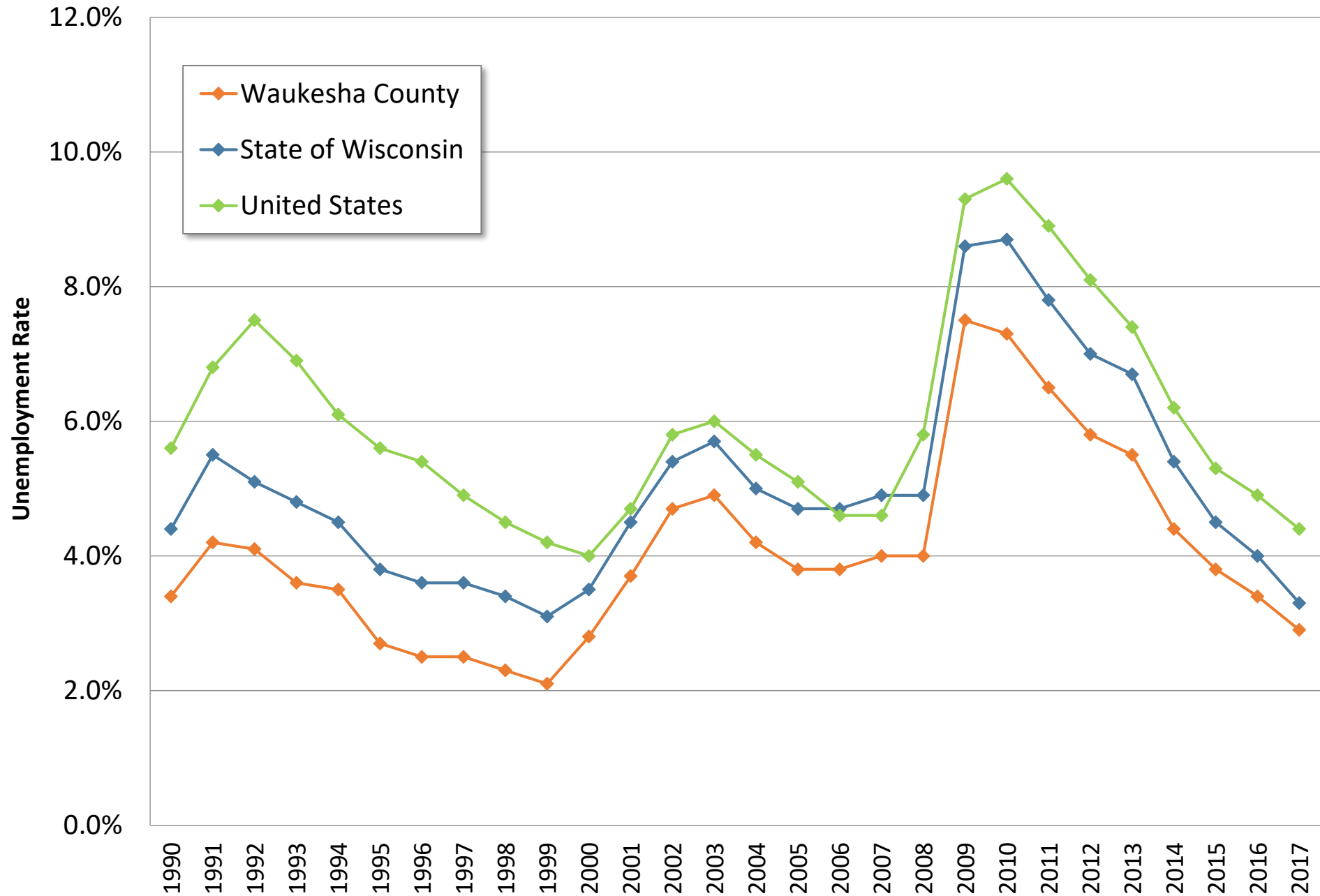
Labor Participation Rate for Females ages 20 to 64 years (2017 1-Year Estimates)



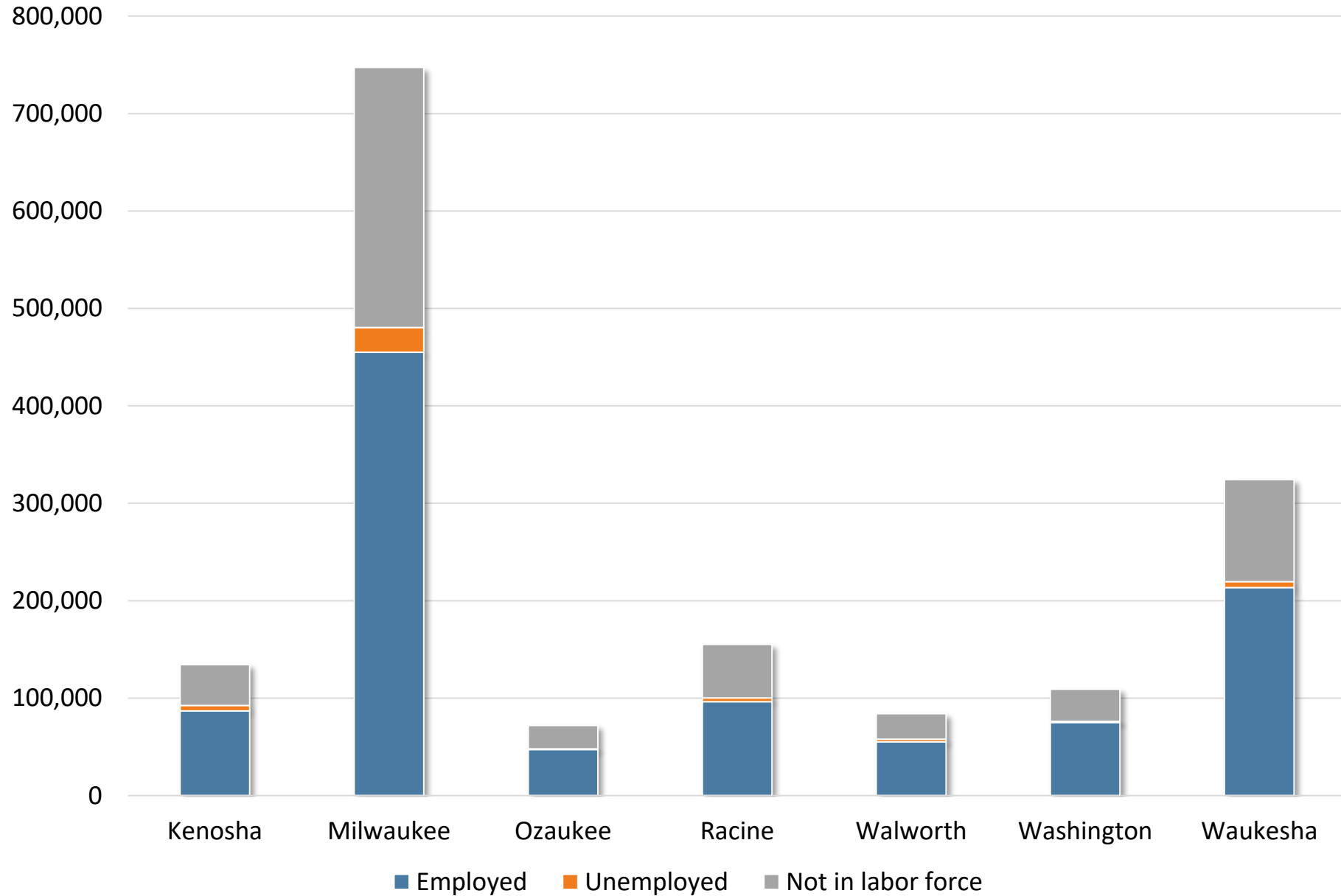
Data Source: U.S. Census Bureau 2017 American Community Survey

* Value not statistically different from Waukesha County at the 90% level.

Annual Average Unemployment Rate – 1990 to 2017



Employment Status for the Population 16 Years and Over in 2017



H-1B Visa Approvals by Metropolitan Area for Fiscal Years 2010-2016

Metropolitan area	Total H-1B visa approvals	H-1B visa approvals per 100 workers	Average salary for H-1B visa approvals	% of H-1B visa approvals with an advanced degree	% of H-1B visa approvals with a U.S. advanced degree
Milwaukee-Waukesha-West Allis, WI	1,500	0.179	\$84,800	46%	11%

Source: Pew Research Center analysis of U.S. Citizenship and Immigration Services data on H-1B visa approvals, received via Freedom of Information Act request on Nov. 17, 2017. Interactive includes data for fiscal years 2010-2016. Data on average monthly civilian labor force by metropolitan area for calendar years 2010-2016 from Bureau of Labor Statistics.

Worker Flow for Waukesha County (Q2 2015)

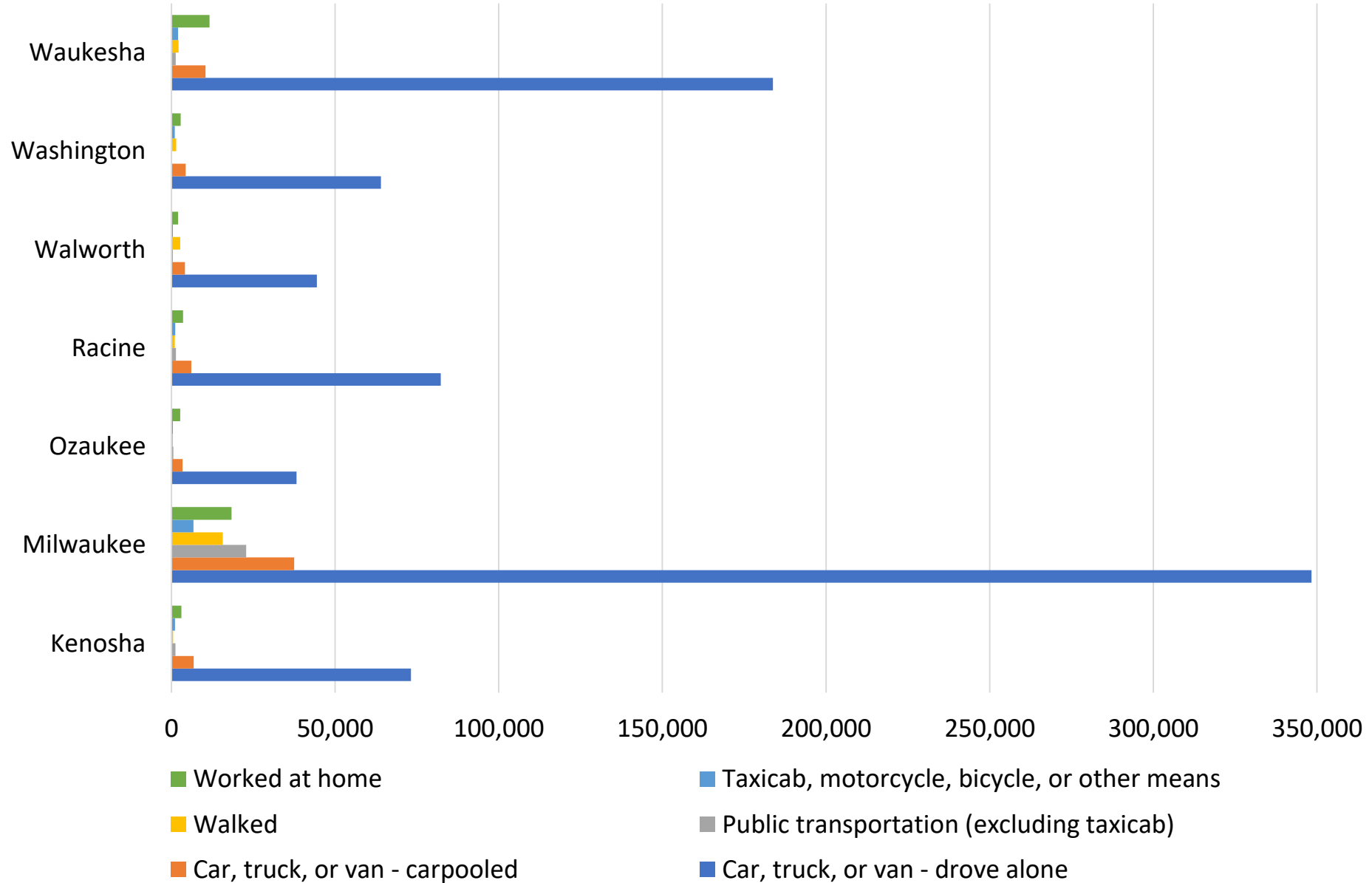
Employees Working in Waukesha County *County of Residence (n = 244,458)*

Place of Residence	Count	Share
Waukesha County, WI	101,382	41.5%
Milwaukee County, WI	71,285	29.2%
Washington County, WI	14,460	5.9%
Racine County, WI	8,112	3.3%
Jefferson County, WI	7,053	2.9%
Walworth County, WI	5,140	2.1%
Dane County, WI	4,888	2.0%
Ozaukee County, WI	4,685	1.9%
Dodge County, WI	3,161	1.3%
Kenosha County, WI	2,601	1.1%
All Other Locations	21,691	8.9%

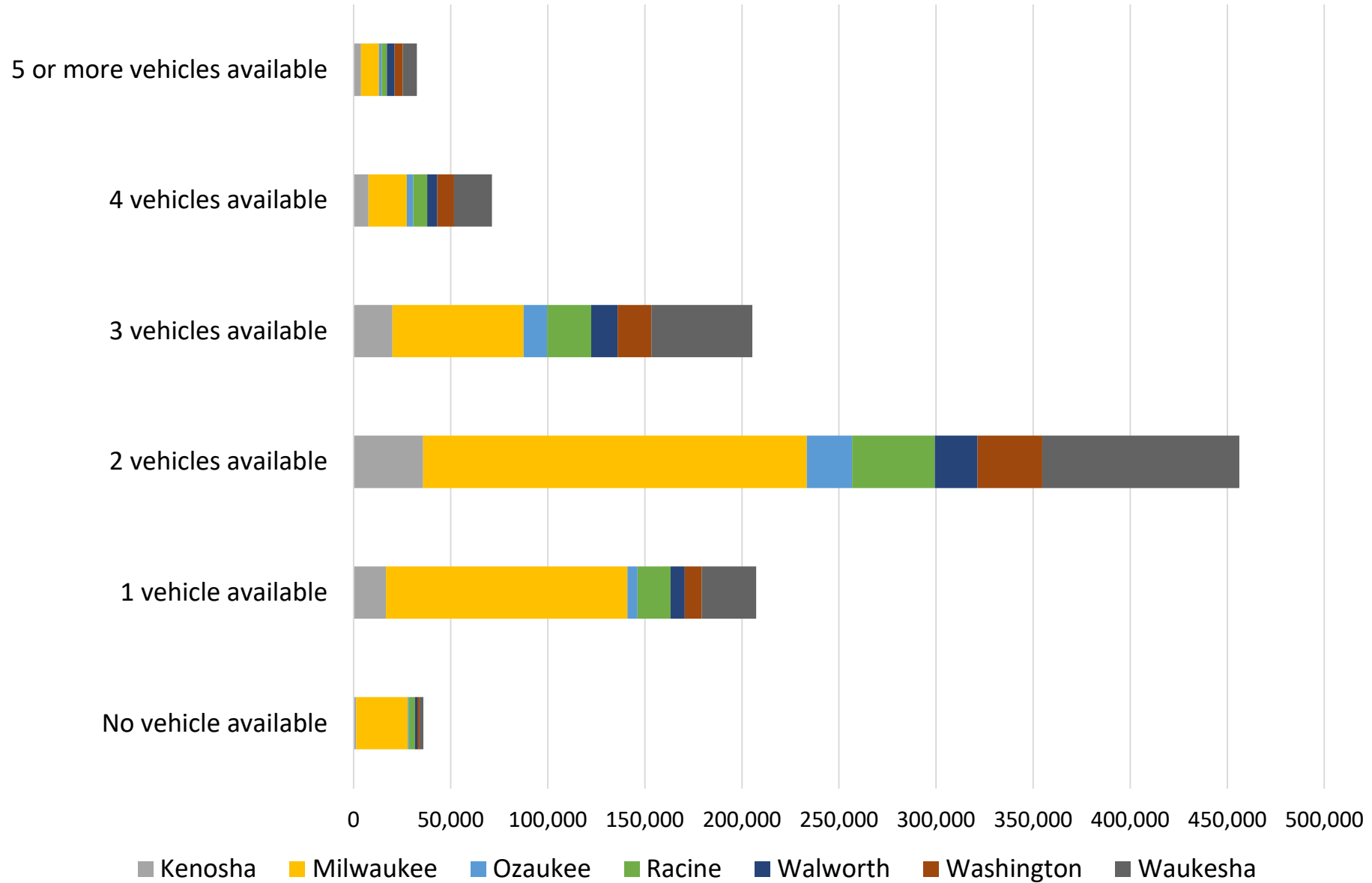
Employees Residing in Waukesha County *County of Employment (n = 206,364)*

Place of Employment	Count	Share
Waukesha County, WI	101,382	49.1%
Milwaukee County, WI	69,901	33.9%
Washington County, WI	5,284	2.6%
Dane County, WI	5,083	2.5%
Ozaukee County, WI	3,073	1.5%
Racine County, WI	2,927	1.4%
Jefferson County, WI	2,170	1.1%
Walworth County, WI	2,023	1.0%
Brown County, WI	1,410	0.7%
Kenosha County, WI	1,340	0.6%
All Other Locations	11,771	5.7%

Means of Transportation to Work in 2017

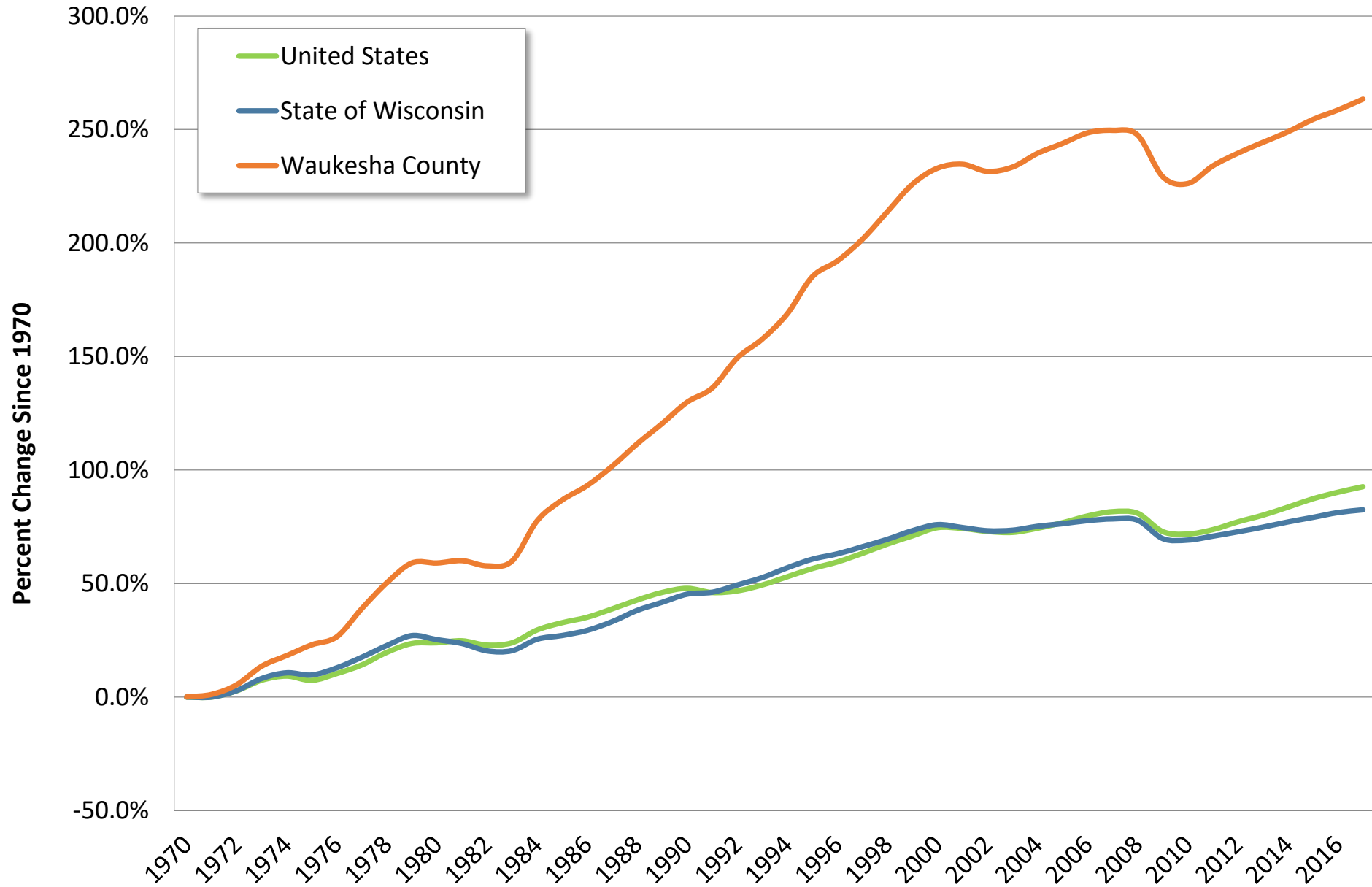


Workers by Vehicles Available in 2017

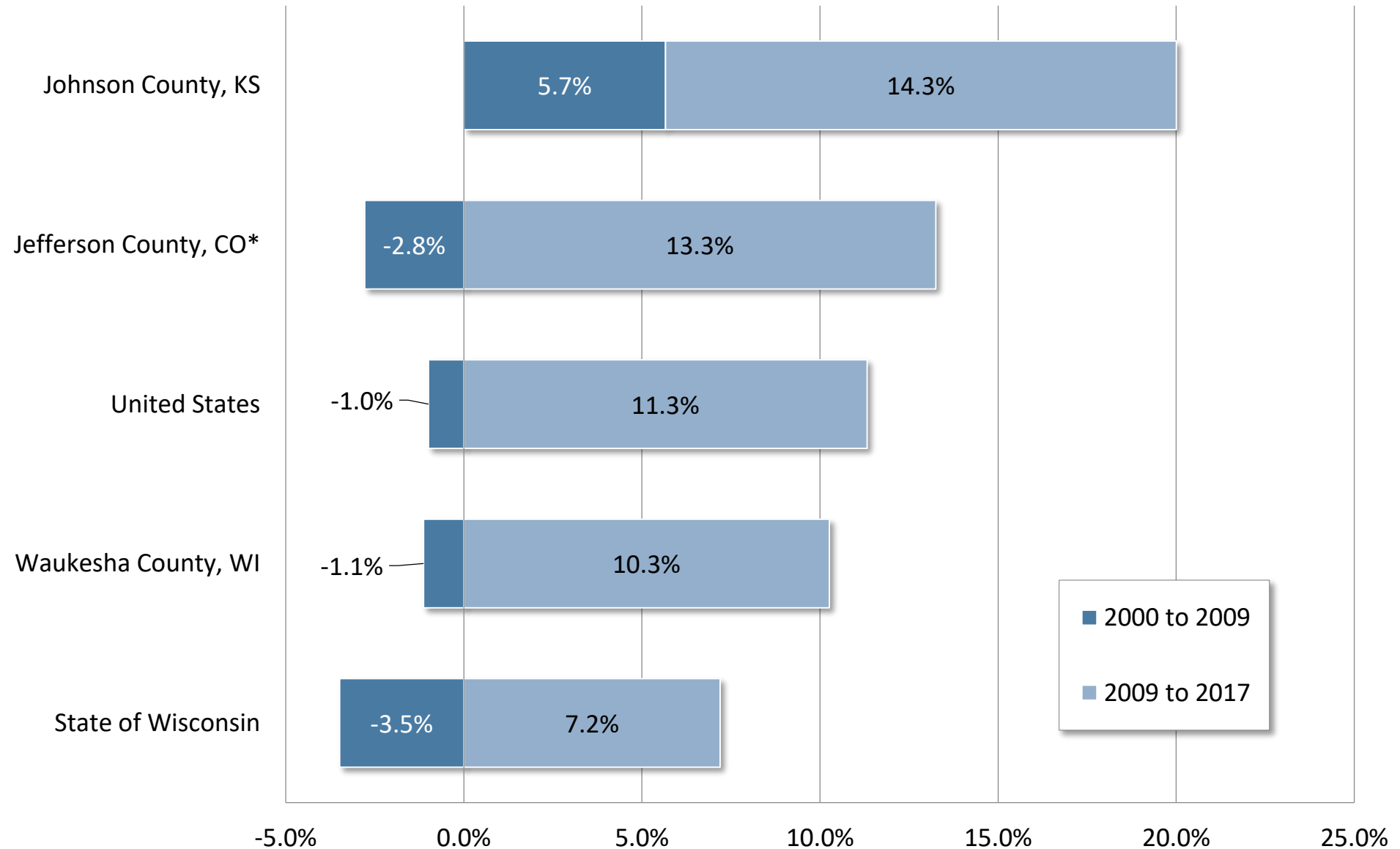


Change in Wage and Salary Employment 1970 to 2017

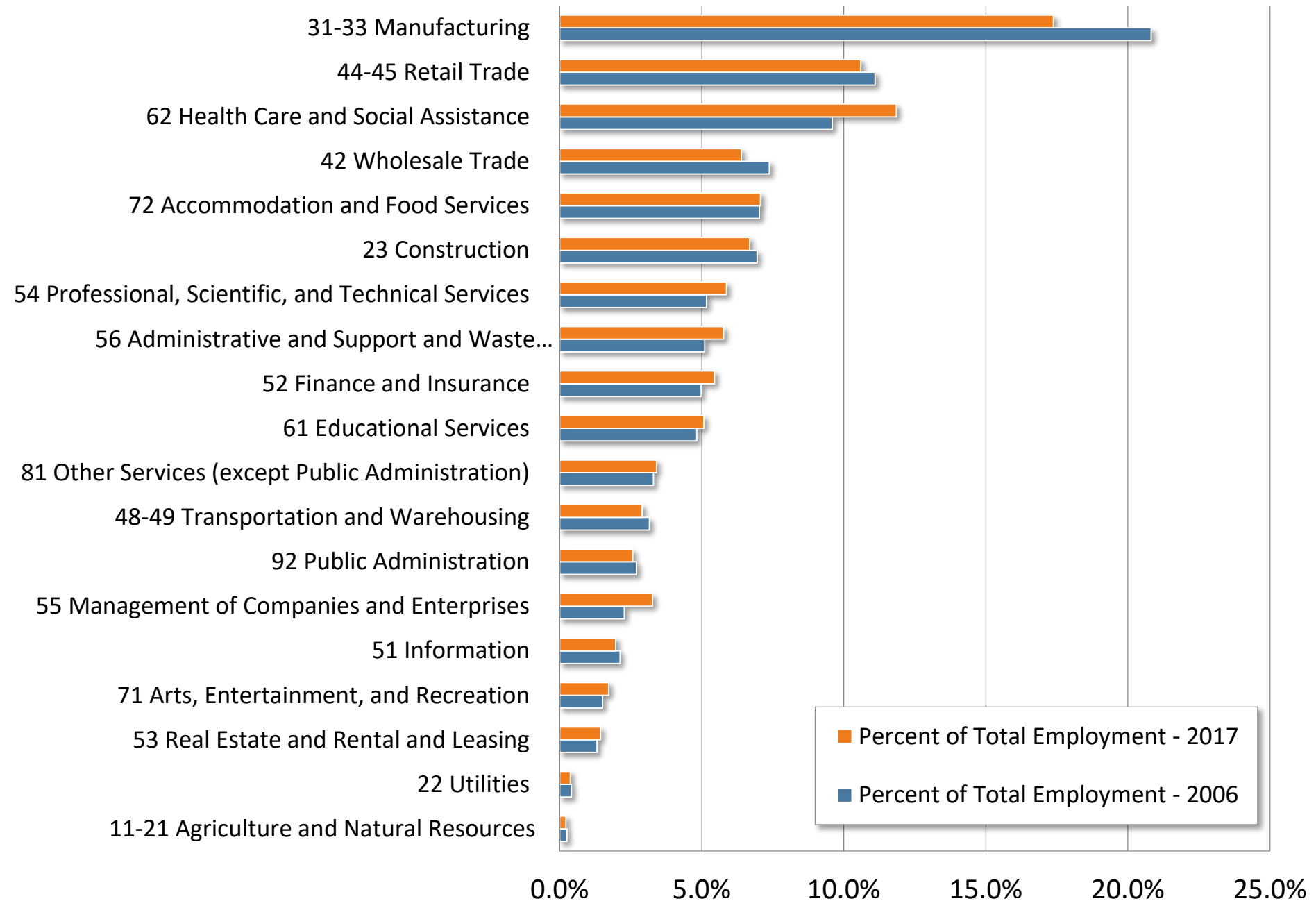
Percent Change Since 1970



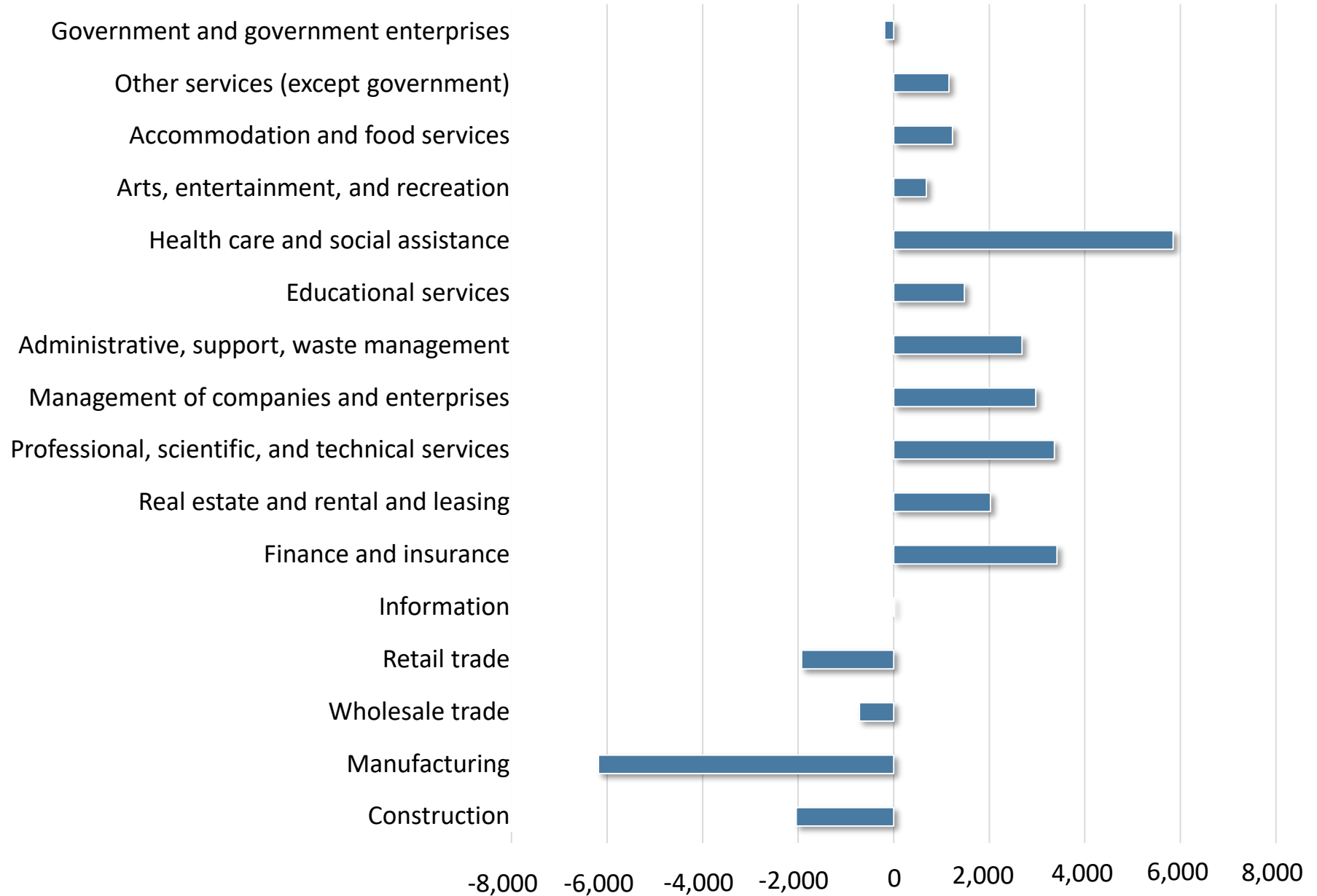
Percent Change in Wage and Salary Employment – 2000 to 2017



Distribution of Employment by Industry Sector – 2006 to 2017

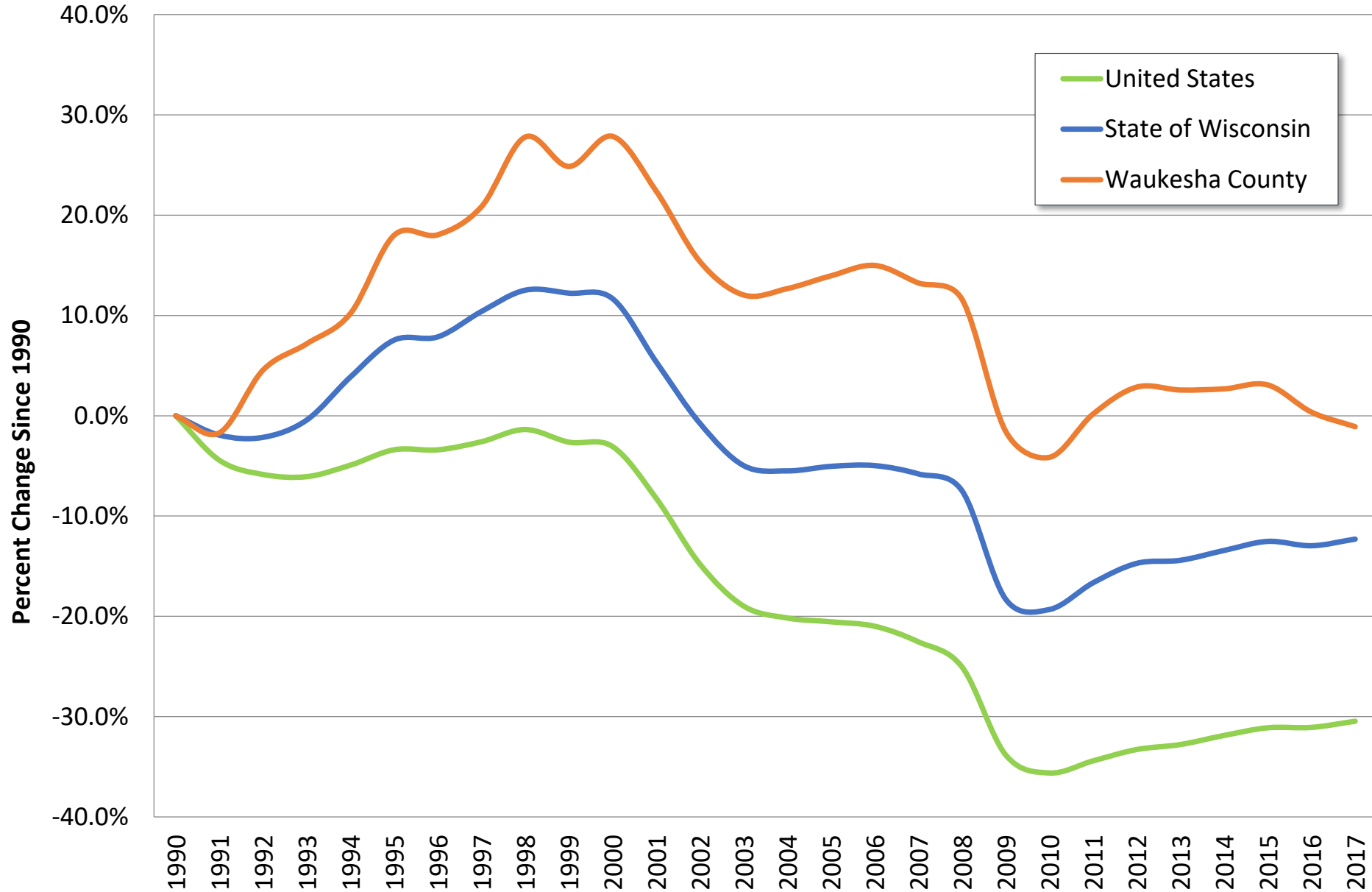


Change in Total Employment from 2006-2016

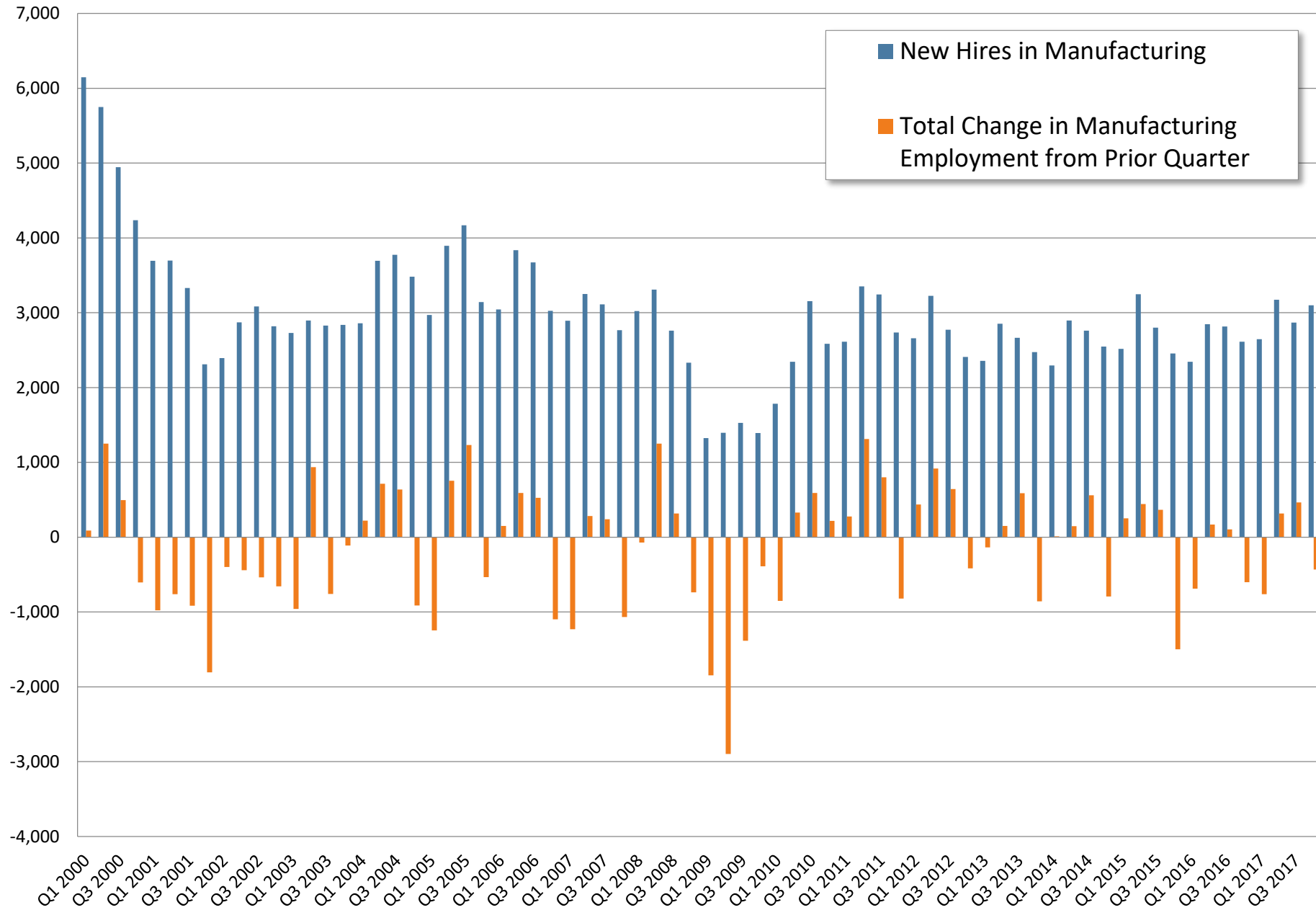


Change in Manufacturing Employment 1990 to 2017

Percent Change Since 1990



New Hires in Manufacturing – Q1 2000 to Q4 2017



Top Employment Location Quotients in Waukesha County (2017)

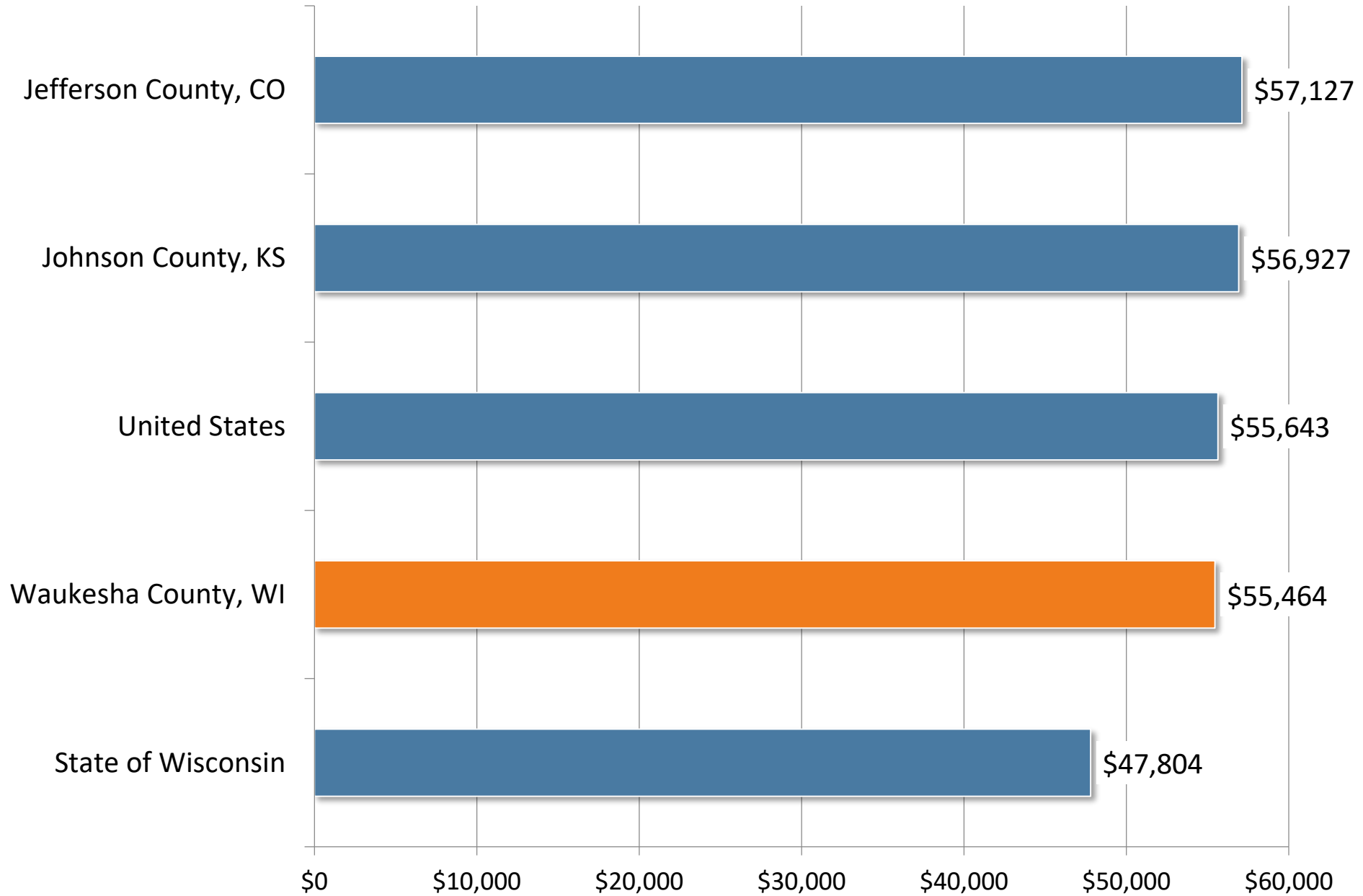
NAICS and Industry	Employment Location Quotient	Average Annual Employment	Annual Average Wage
323 Printing and related support activities	8.12	5,999	\$63,682
335 Electrical equipment and appliance mfg.	6.91	4,491	\$75,782
333 Machinery manufacturing	4.18	7,546	\$70,801
518 Data processing, hosting and related services	3.58	1,890	\$130,026
332 Fabricated metal product manufacturing	3.28	7,828	\$56,273
326 Plastics and rubber products manufacturing	2.67	3,212	\$54,647
334 Computer and electronic product manufacturing	2.60	4,550	\$101,057
423 Merchant wholesalers, durable goods	2.20	10,976	\$71,549
551 Management of companies and enterprises	2.06	7,905	\$88,829
331 Primary metal manufacturing	1.64	1,018	\$62,964

Major Employers in Waukesha County

Business Name	Municipality	Employment
Kohl's	Menomonee Falls	2,000 or More
ProHealth Waukesha Memorial Hospital	Waukesha	2,000 or More
GE Healthcare	Waukesha	2,000 or More
Waukesha County	Waukesha	1,500-1,999
Community Memorial Hospital	Menomonee Falls	1,500-1,999
Quad/Graphics Inc	Sussex	1,500-1,999
Waukesha County Technical College	Pewaukee	1,000-1,499
Aurora Medical Center	Summit	1,000-1,499
Harley-Davidson Motor Co	Menomonee Falls	1,000-1,499
Kohl's Service and Operations Center	Menomonee Falls	1,000-1,499
United Parcel Service	Elm Grove	1,000-1,499
ProHealth Oconomowoc Memorial Hospital	Oconomowoc	750-999
Arandell Corporation	Menomonee Falls	750-999
Ascension Elmbrook Hospital	Brookfield	750-999
AT&T	Waukesha	500-749
Carroll University	Waukesha	500-749
Froedert Health at Woodland Prime Corporate Center	Menomonee Falls	500-749
Target Distribution Center	Oconomowoc	500-749
GE Distributed Power	Waukesha	500-749
ProHealth Care Inc	Waukesha	500-749
MetalTek International: Wisconsin Centrifugal Division	Waukesha	500-749
Generac Power Systems Inc	Waukesha	500-749
GMR Marketing	New Berlin	500-749
Quad/Graphics Inc	Pewaukee	500-749
SPX Transformer Solutions Inc	Waukesha	500-749
Rogers Memorial Hospital	Oconomowoc	500-749
FIS Management Services	Menomonee Falls	500-749
QuadTech Inc	Sussex	500-749
U.S. Bank	Brookfield	500-749
YMCA at Pabst Farms	Oconomowoc	500-749
Thomson Reuters	Brookfield	500-749
Husco International	Waukesha	500-749

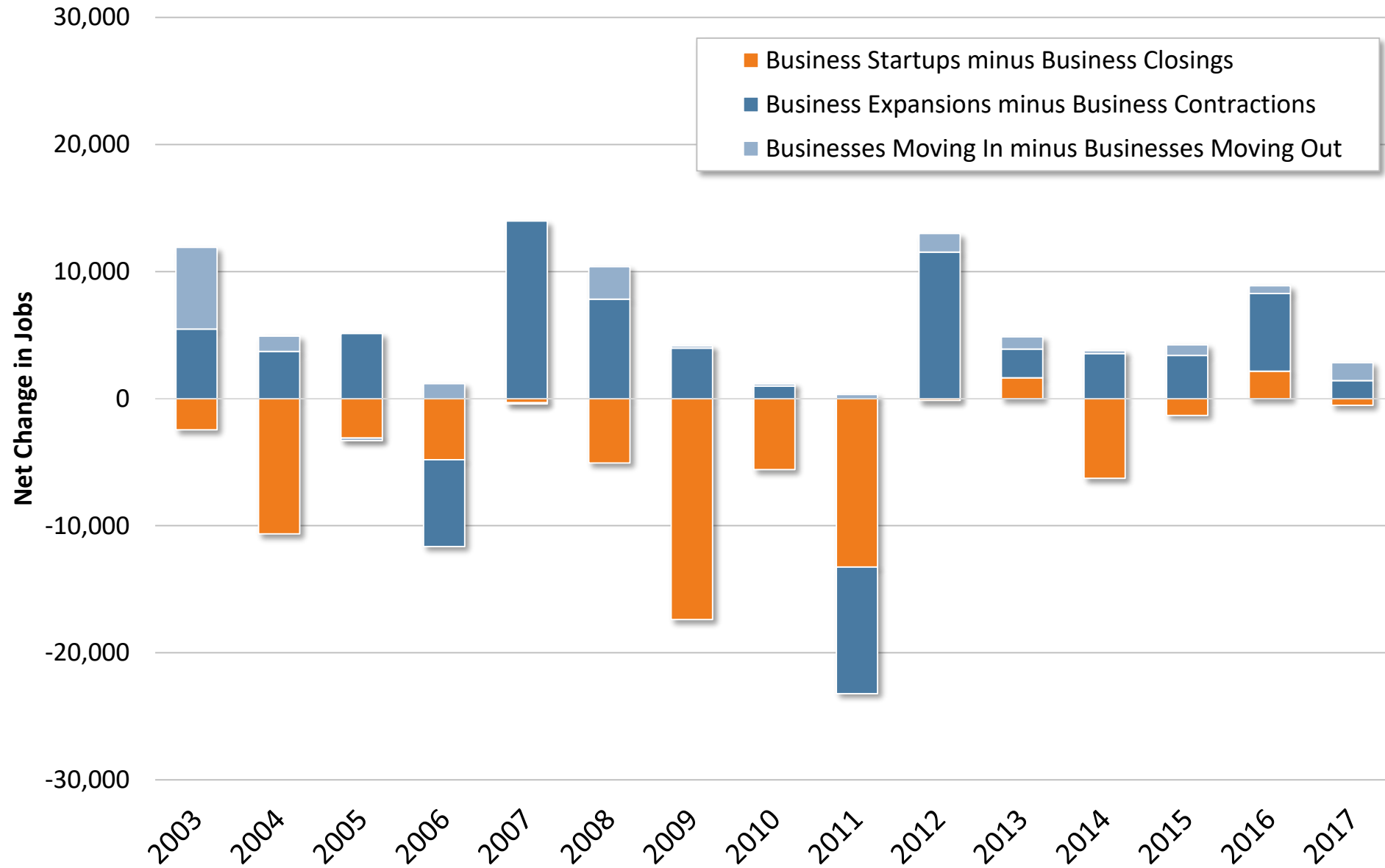
Source: Wisconsin WorkNet and SEWRPC

Annual Average Salary and Wages – All Jobs (2017)



Business Growth

Waukesha County Net Change in Employment by Components of Change (2003 to 2017)

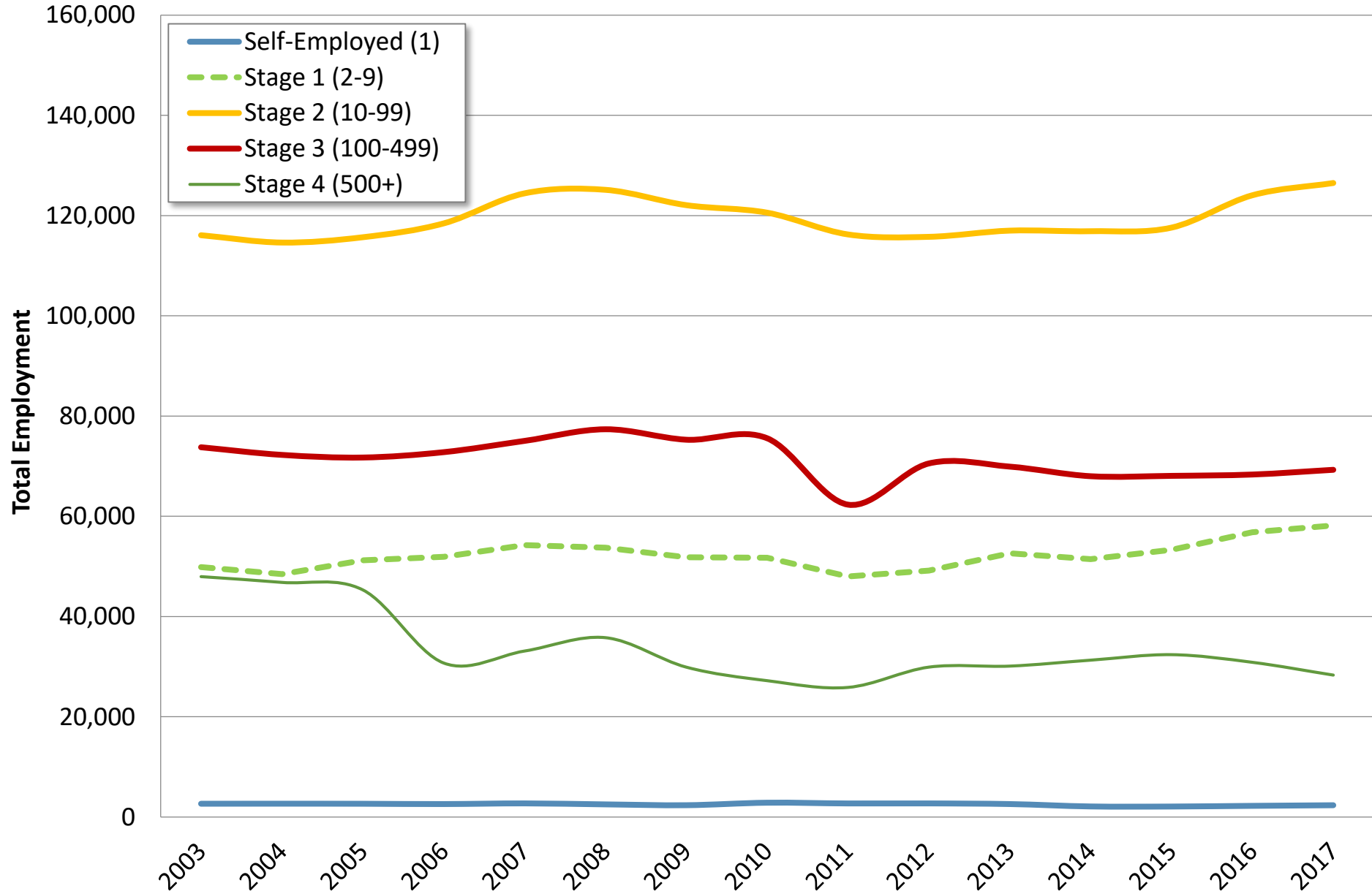


Business Stages

- **Self-Employed (1 employee)** - Small-scale business activity that can be conducted in homes as well as sole proprietorships;
- **Stage 1 (2-9 employees)** – Includes partnerships, lifestyle businesses and startups. Often focused on defining a market, developing a product or service, obtaining capital and finding customers;
- **Stage 2 (10-99 employees)** – A company typically has a proven product, and survival is less of a daily concern. Companies begin to develop infrastructure and standardize operational systems. Leaders delegate more and wear fewer hats;
- **Stage 3 (100-499 employees)** - Expansion is a hallmark as companies broaden their geographic reach, add new products and pursue new markets. Stage 3 companies introduce formal processes and procedures, and the founder is less involved in daily operations and more concerned with managing culture and change;
- **Stage 4 (500 or more employees)** – By Stage 4, an organization is typically dominant in its industry and is focused on maintaining and defending its market position. Key objectives focus on tasks such as controlling expenses, raising productivity, increasing market penetration and managing market niches.

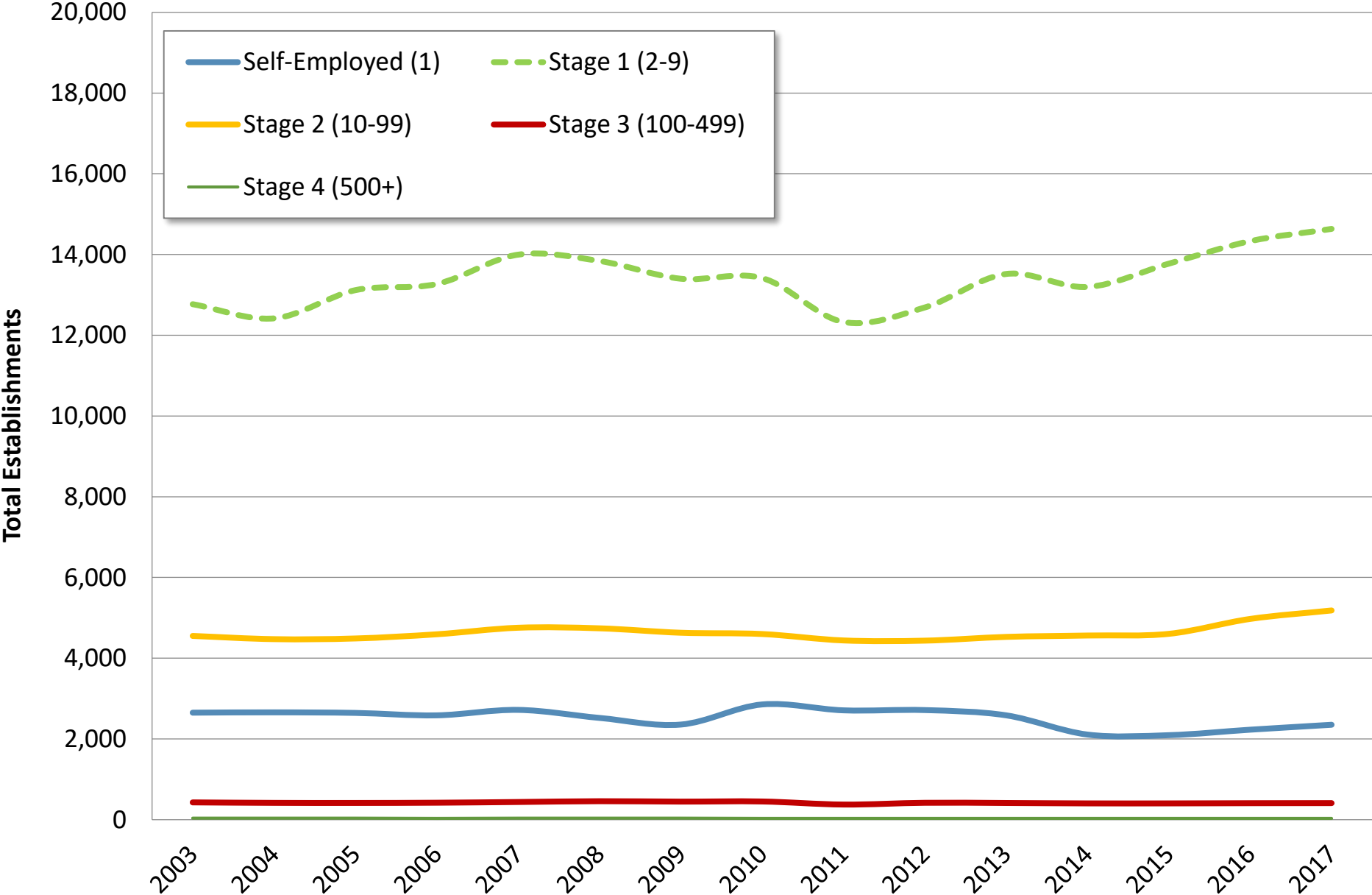
Waukesha County Employment 2003 to 2017

Total Employment by Establishment Stage



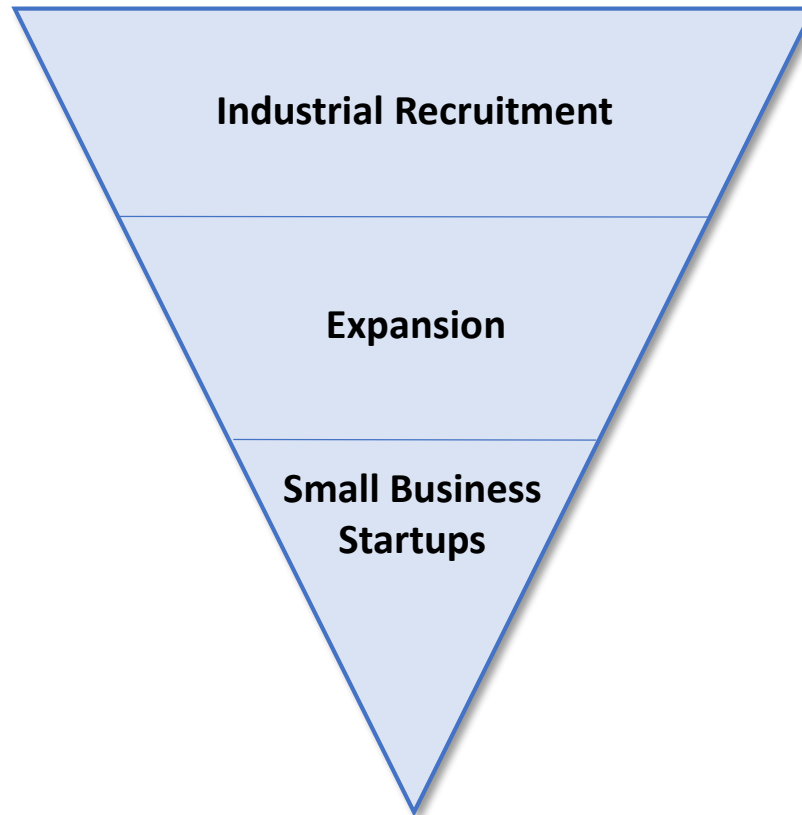
Waukesha County Employment 2003 to 2017

Total Establishments by Stage

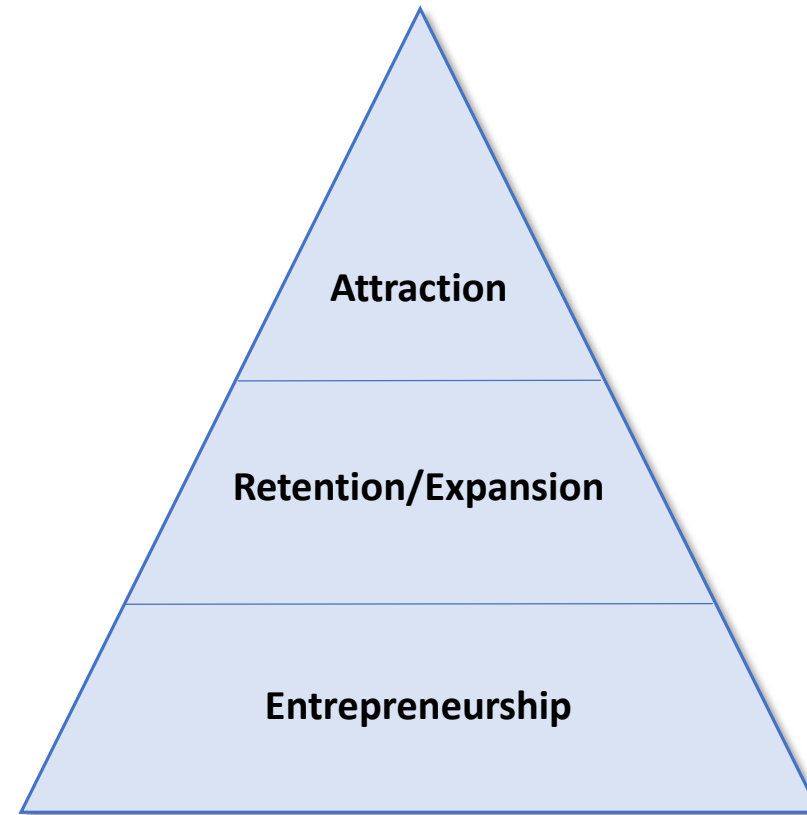


Traditional and New Models of Economic Development

Traditional Model



New Model



Key Points and Summary

- Rebounding population growth has helped to push home sales and sale prices above pre-recession levels.
- Movers in Waukesha County are more likely to come from within another county in Wisconsin than state and national averages.
- Waukesha County continues to grow older with the largest percentage increases found in residents age 65 and older. These shifts have implications for the region's labor force, housing stock, health care systems and tax base.
- Labor participation rates for Waukesha County residents age 20 to 64 are high, with values above state and national averages and statistically similar to peer counties.
- While there is still a significant exchange of workers among surrounding counties, a growing share and number of Waukesha County jobs are filled by residents of Milwaukee County

Key Points and Summary

- Health care, professional, scientific and technical services, finance and insurance and management of companies of enterprises have grown their shares of total employment.
- Many of these growing industries require higher levels of educational attainment and different occupational mixes than the industries declining in employment.
- Employment in the manufacturing sector remained largely steady between 2012 and 2015, but once again declined in 2016 and 2017. Despite these declines, manufacturing remains the largest employment sector in Waukesha County and continues to require a notable number of new hires.
- Since 2003 Waukesha County has increased employment in establishments with 1 to 9 employees (Stage 1 establishments) and 10 to 99 employees (Stage 2 establishments).
- Business expansions continue to provide the greatest source of job growth in Waukesha County.

For More Information on Today's Presentation

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