



Regional Data Snapshot

Industry Cluster Analysis
SET Session 1

North Central IN RPC, Indiana

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01 overview

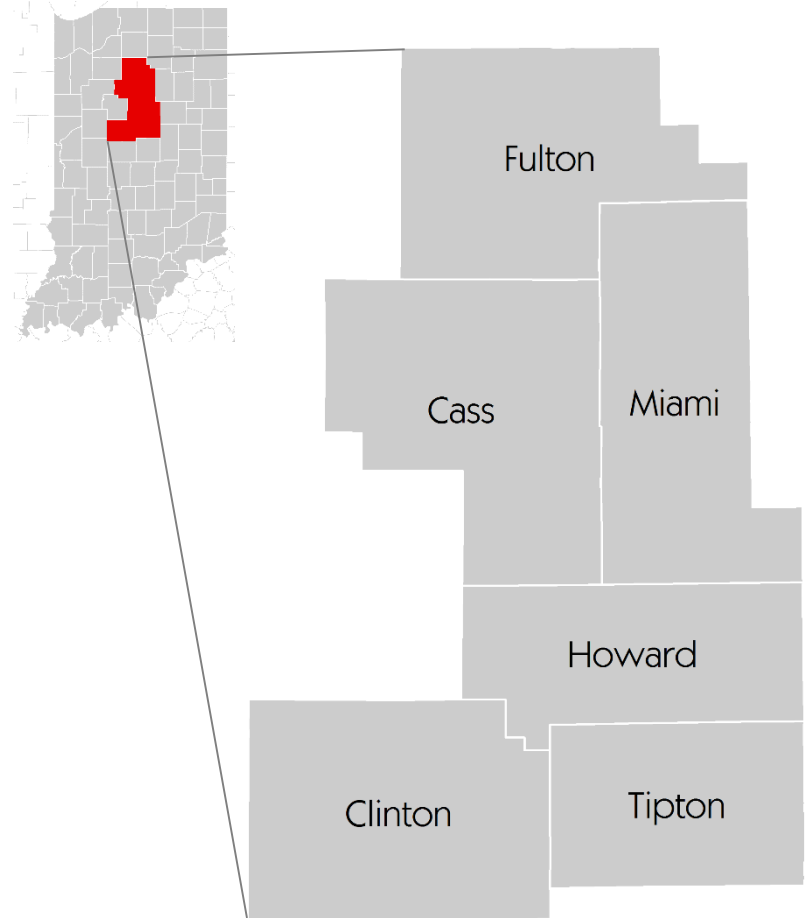
North Central IN RPC, IN

Overview

North Central IN RPC

The North Central IN RPC Region is comprised of 6 Indiana counties. State Highway 31 connects the region to Indianapolis in the south, and South Bend in the north.

- Cass
- Clinton
- Fulton
- Howard
- Miami
- Tipton



02 industry and occupation

Establishments

Employment by industry

Industry and occupation

Components of changes in Jobs

Changes in Jobs (2009-2015)

Gained by	New Startups	25,078
	Spinoffs	8,652
	Expansion	16,393
	In-migration	851
Lost by	Closings	-30,613
	Contractions	-15,098
	Out-migration	-1,101
	Net change	4,162

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.



Definition of Company Stages

0	Self-employed	1	2-9 employees
2	10-99 employees	3	100-499 employees
4	500+ employees		

Industry and occupation

Establishments

Number of Establishments by Company Stages

Stage	2009		2015	
	Establishments	Proportion	Establishments	Proportion
Stage 0	1,393	16%	1,319	13%
Stage 1	5,423	64%	6,837	69%
Stage 2	1,559	18%	1,583	16%
Stage 3	124	1%	113	1%
Stage 4	17	0.2%	17	0.2%
Total	8,516	100%	9,869	100%

Questions:

- What stage businesses have shaped the region's economic growth in the last 6 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Industry and occupation

Establishments

Number of Jobs by Company Stages

Year	2009	2015	% Change
Stage 0	1,393	1,346	-3%
Stage 1	20,692	26,324	27%
Stage 2	38,947	38,069	-2%
Stage 3	22,153	19,393	-12%
Stage 4	26,983	29,198	8.2%
Total	110,168	114,330	4%

Sales (\$Billion, 2015) by Company Stages

Year	2009	2015	% Change
Stage 0	0.27	0.2	-10%
Stage 1	4.56	6.0	31%
Stage 2	7.88	9.2	17%
Stage 3	6.50	6.5	-1%
Stage 4	13.32	12.9	-3.5%
Total	32.54	34.73	7%

Questions

What establishments are the most numerous based on company stages?

What stages have experienced the largest growth? The greatest decline?

What company stage employs the largest number of people?

What stage captures the most sales?

Which ones have experienced the greatest percentage loss over the 2009-2015 period?

Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
56	Administrative and Support and Waste Management and Remediation Services	3,735	4,576	841	23%	23%
31	Manufacturing	20,032	24,336	4304	21%	15%
62	Health Care and Social Assistance	8,982	10,742	1760	20%	7%
51	Information	797	891	94	12%	-4%
61	Educational Services	534	590	56	10%	9%
72	Accommodation and Food Services	7,015	7,668	653	9%	8%
48	Transportation and Warehousing	2,732	2,947	215	8%	12%
53	Real Estate and Rental and Leasing	2,668	2,828	160	6%	4%
23	Construction	5,033	5,244	211	4%	0%
44	Retail Trade	11,829	11,985	156	1%	3%

Questions:

- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

Industry and occupation

Top Nine industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
22	Utilities	310	257	-53	-17%	-8%
90	Government	17,904	15,569	-2335	-13%	-3%
21	Mining, Quarrying, and Oil and Gas Extraction	227	204	-23	-10%	30%
54	Professional, Scientific, and Technical Services	2,584	2,441	-143	-6%	5%
71	Arts, Entertainment, and Recreation	1,125	1,075	-50	-4%	1%
81	Other Services (except Public Administration)	6,793	6,621	-172	-3%	4%
52	Finance and Insurance	3,367	3,292	-75	-2%	1%
11	Crop and Animal Production	4,882	4,807	-75	-2%	1%
55	Management of Companies and Enterprises	217	216	-1	0%	16%

Questions:

- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

03 Industry cluster analysis

North Central IN RPC, IN

Industry cluster analysis

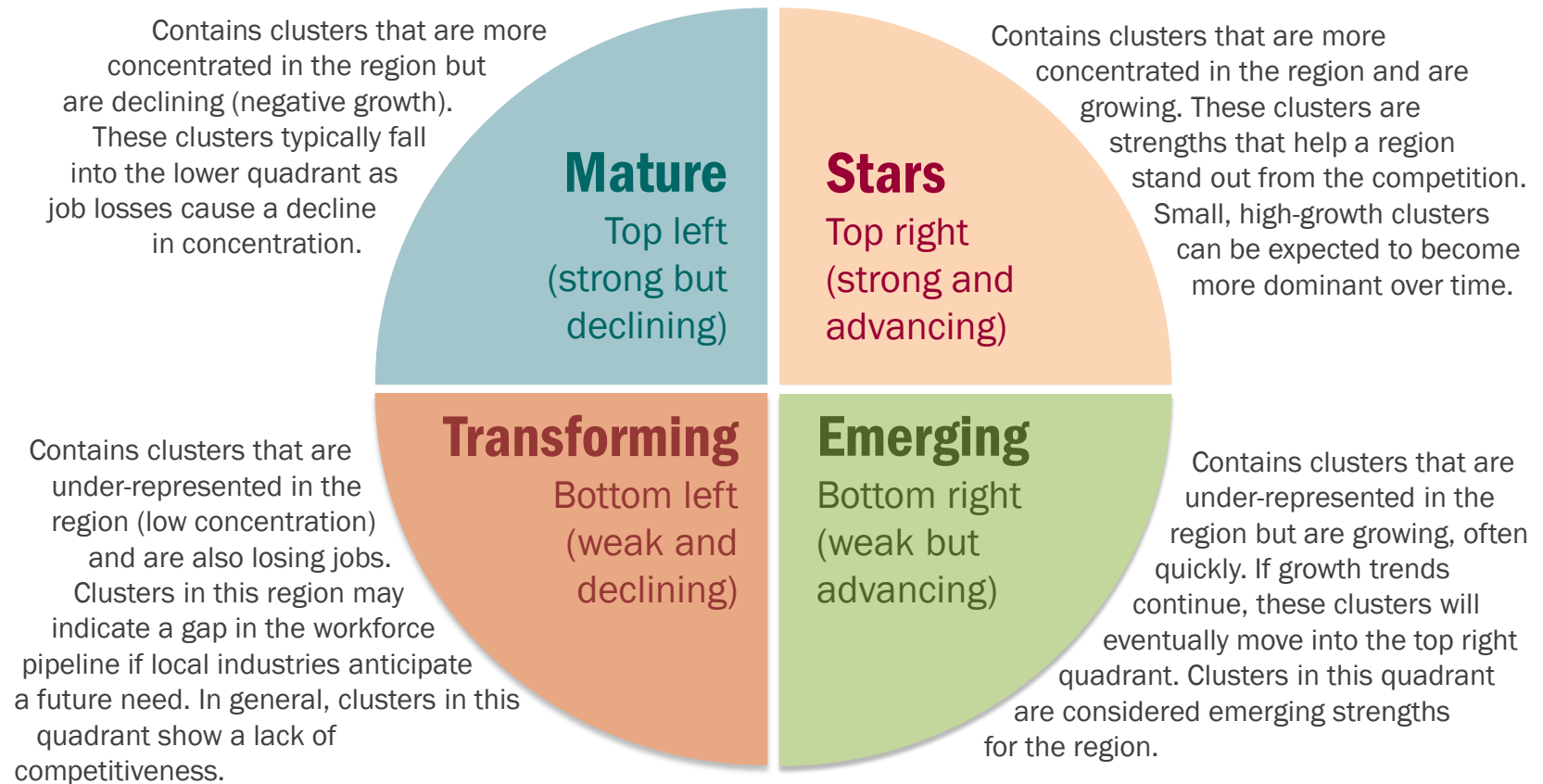
List of Clusters

- Advanced Materials
- Agribusiness, Food Processing & Technology
- Apparel & Textiles
- Arts, Entertainment, Recreation & Visitor Industries
- Biomedical/Biotechnical (Life Sciences)
- Business & Financial Services
- Chemicals
- Computer & Electronic Product Manufacturing
- Defense & Security
- Education & Knowledge Creation
- Electrical Equip, Appliance & Component Manufacturing
- Fabricated Metal Product Manufacturing
- Energy (Fossil & Renewable)
- Forest & Wood Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Machinery Manufacturing
- Manufacturing Super-cluster
- Mining
- Primary Metal Manufacturing
- Printing & Publishing
- Transportation & Logistics
- Transportation Equipment Manufacturing

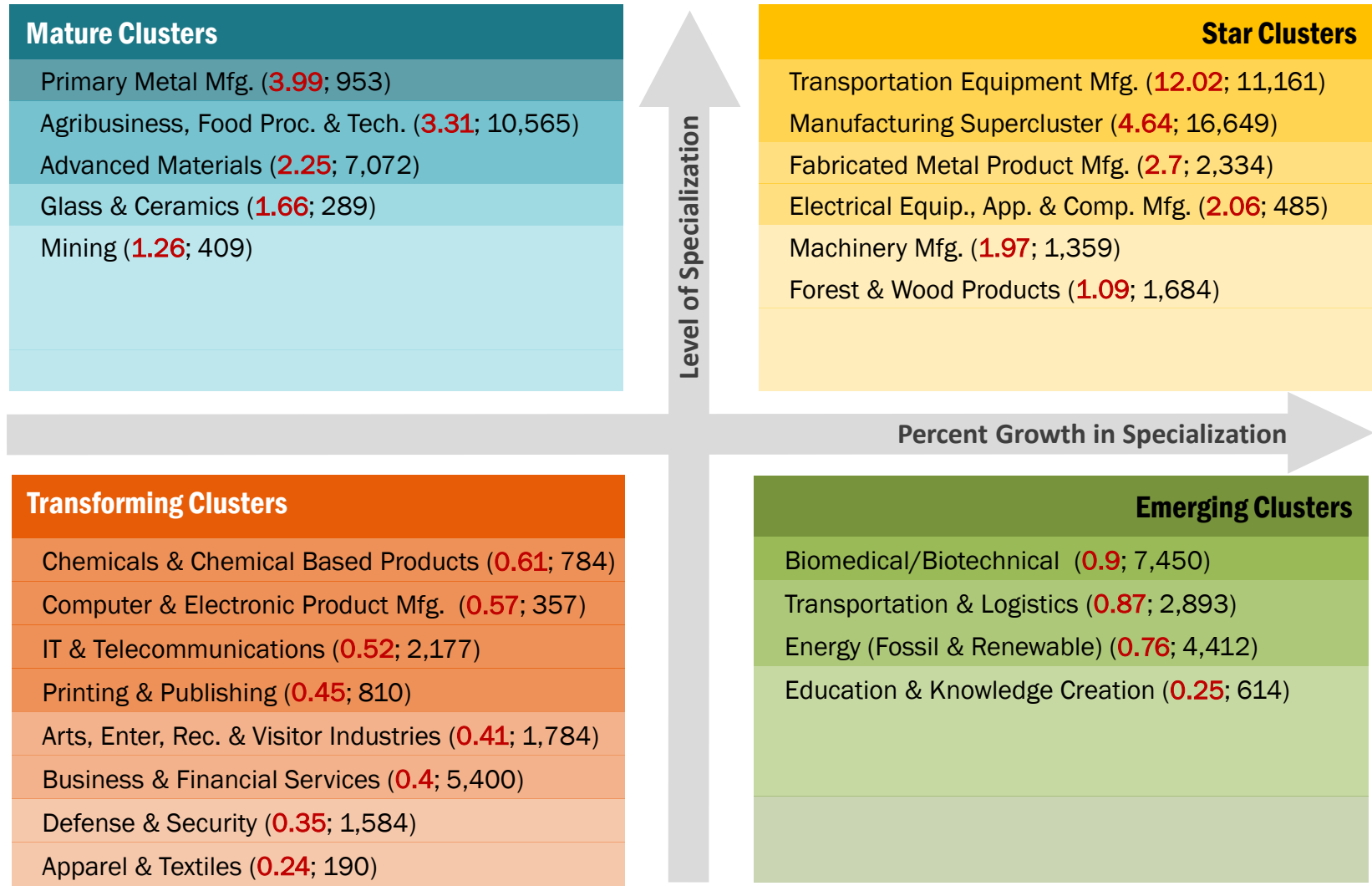
Industry cluster analysis

How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.



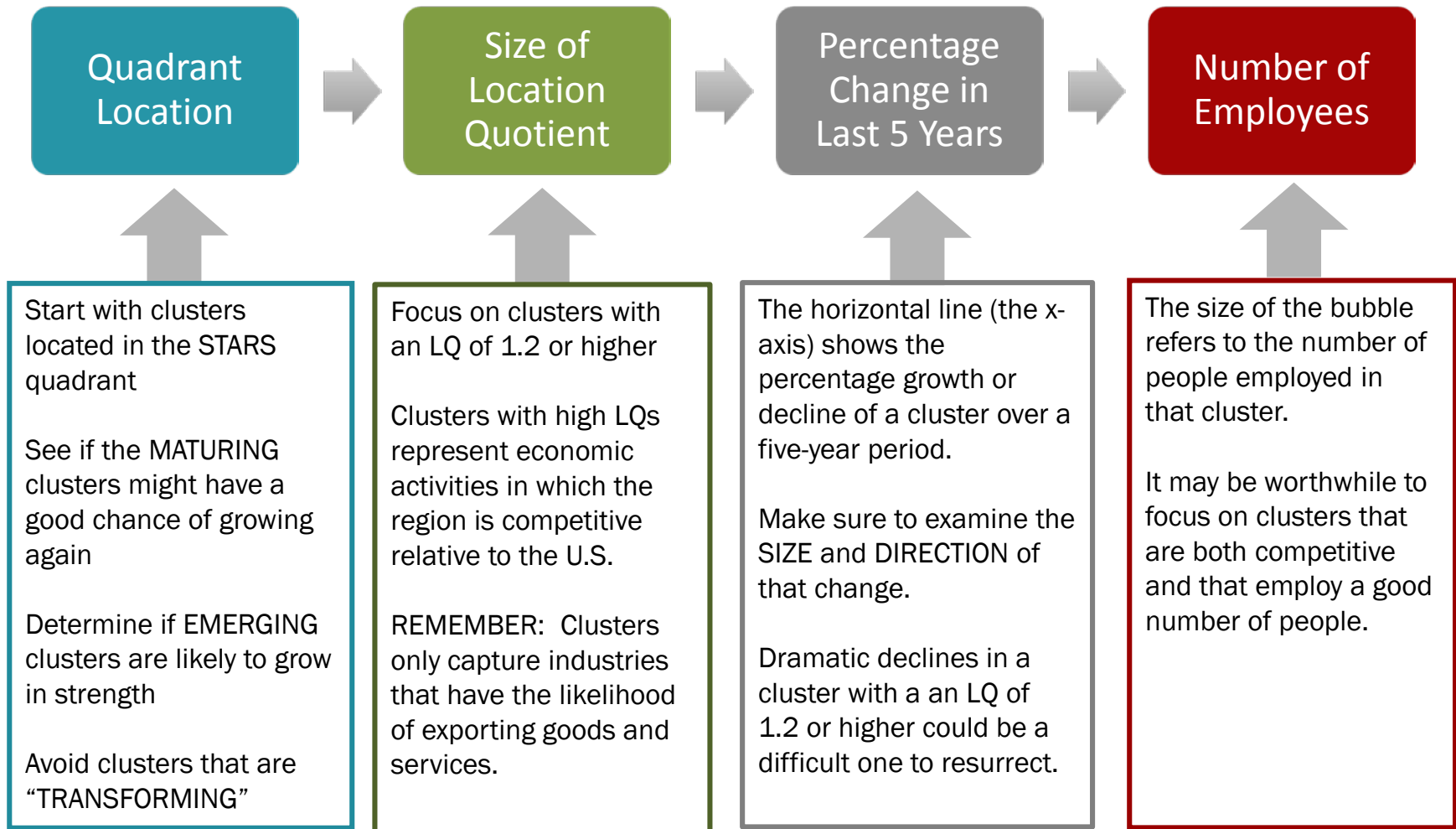
Industry cluster analysis



section 03

NOTE: The first number after each cluster represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient as shown in the bubble chart.

Bubble Chart: What to Look at First



Quadrant Location

Size of Location Quotient

Percentage Change in Last 5 Years

Number of Employees

Start with clusters located in the STARS quadrant

See if the MATURING clusters might have a good chance of growing again

Determine if EMERGING clusters are likely to grow in strength

Avoid clusters that are "TRANSFORMING"

Focus on clusters with an LQ of 1.2 or higher

Clusters with high LQs represent economic activities in which the region is competitive relative to the U.S.

REMEMBER: Clusters only capture industries that have the likelihood of exporting goods and services.

The horizontal line (the x-axis) shows the percentage growth or decline of a cluster over a five-year period.

Make sure to examine the SIZE and DIRECTION of that change.

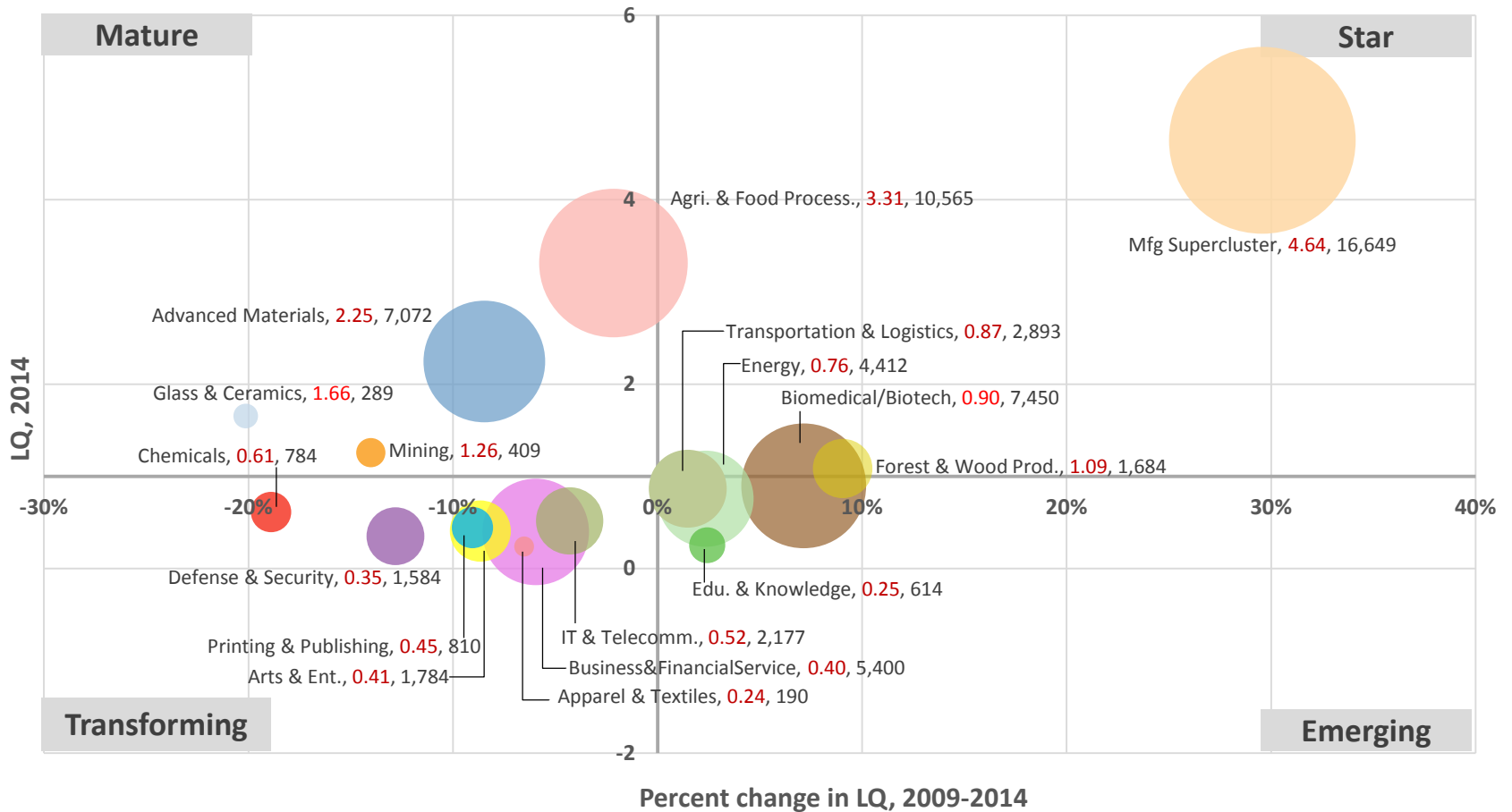
Dramatic declines in a cluster with an LQ of 1.2 or higher could be a difficult one to resurrect.

The size of the bubble refers to the number of people employed in that cluster.

It may be worthwhile to focus on clusters that are both competitive and that employ a good number of people.

Industry and occupation

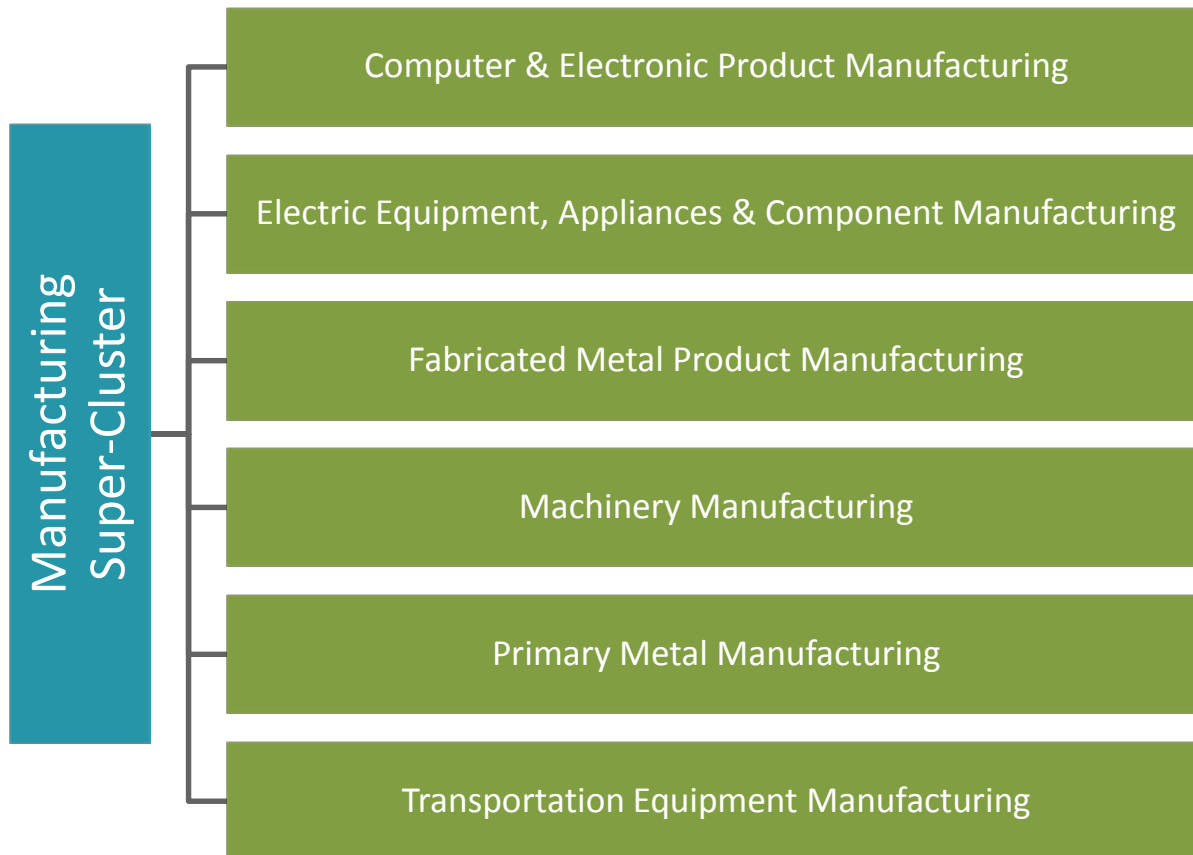
Industry cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014

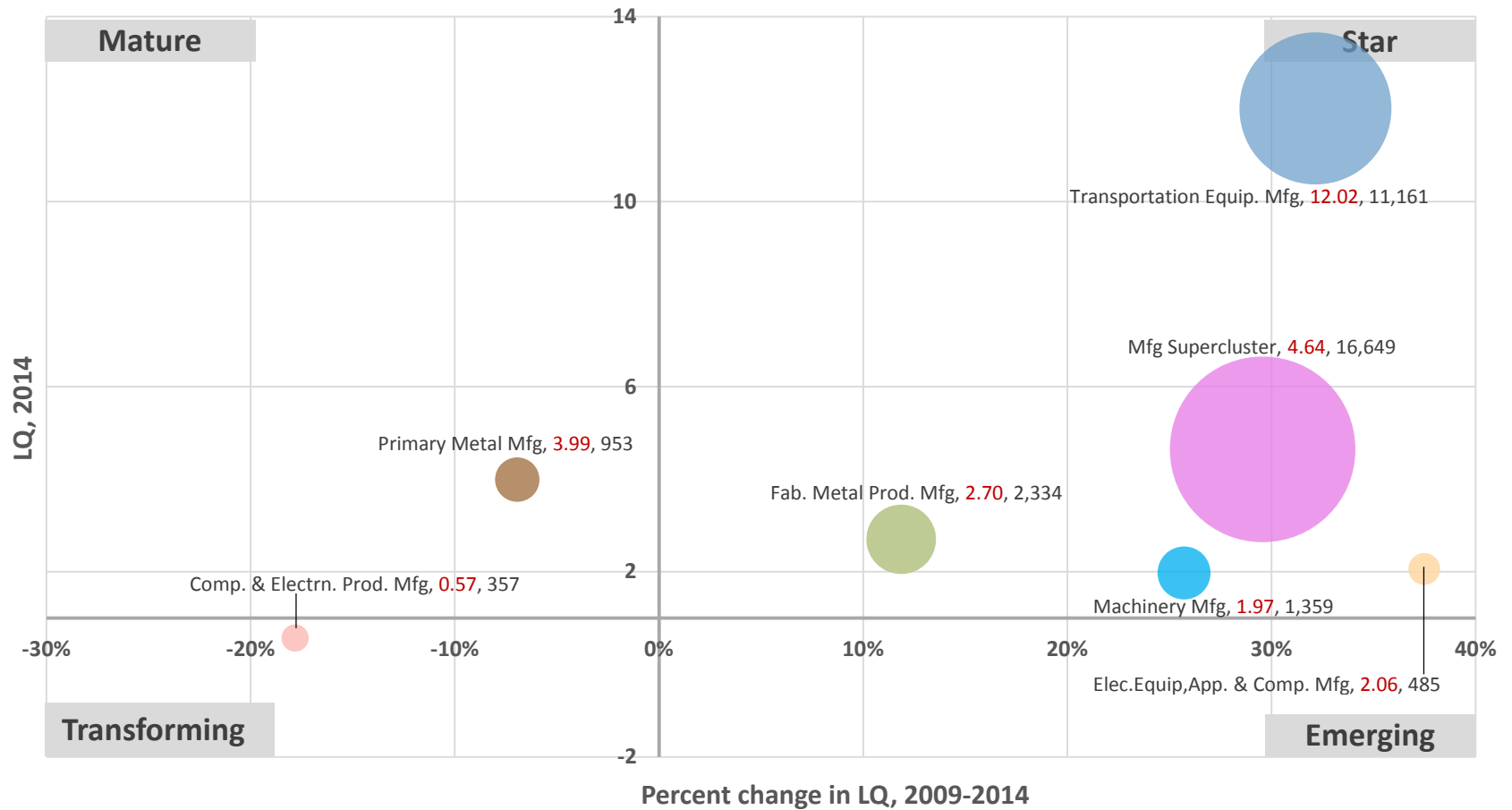
The Manufacturing Super-Cluster

Please note that this is not a cluster that a SET region should select. Rather, focus on the manufacturing sub-clusters that are important to that super-cluster.



Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Label includes cluster name, LQ in 2014, and Employment in 2014.

Industry and occupation

For your region

Mature Industries

Five industry clusters in the North Central IN RPC Region are in the Matured stage: Primary Metal Mfg.; Agribusiness, Food Processing & Tech.; Advanced Materials; Glass & Ceramics; and Mining. These industries are relatively concentrated, but its growth is trending downward. It is worth noting, however, that the North Central IN RPC Region may find it worthwhile to invest in efforts to shore up the concentration of these industries.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the Region, Chemicals; Computer & Electronic Prod. Mfg.; IT & Telecom.; Printing & Publishing; Arts, Ent., Rec. & Visitor Industries; Business & Financial Services; Defense & Security; and Apparel & Textiles. Eight industry clusters are all Transforming clusters. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. Five Star industry clusters in the North Central IN RPC Region are Transportation Equip. Mfg.; Fabricated Metal Product Mfg.; Electrical Equip., App. & Comp. Mfg.; Machinery Mfg.; and Forest & Wood Products. These clusters indicate that they have a little more jobs concentration in the region compared to the U.S.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are four Emerging clusters in total in the North Central IN RPC Region: Biomedical/Biotechnical (Life Sciences); Transportation & Logistics; Energy; and Education & Knowledge Creation.

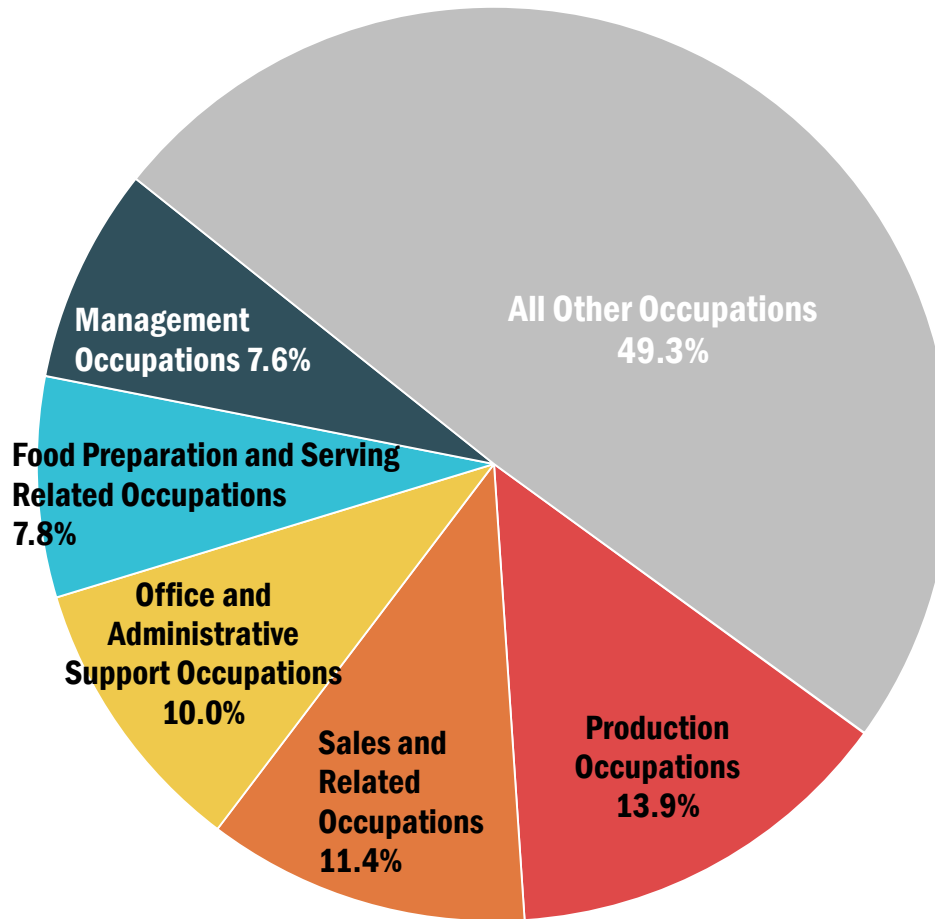
04 occupations

Top occupations

STEM occupations

Industry and occupation

Top five occupations in 2014

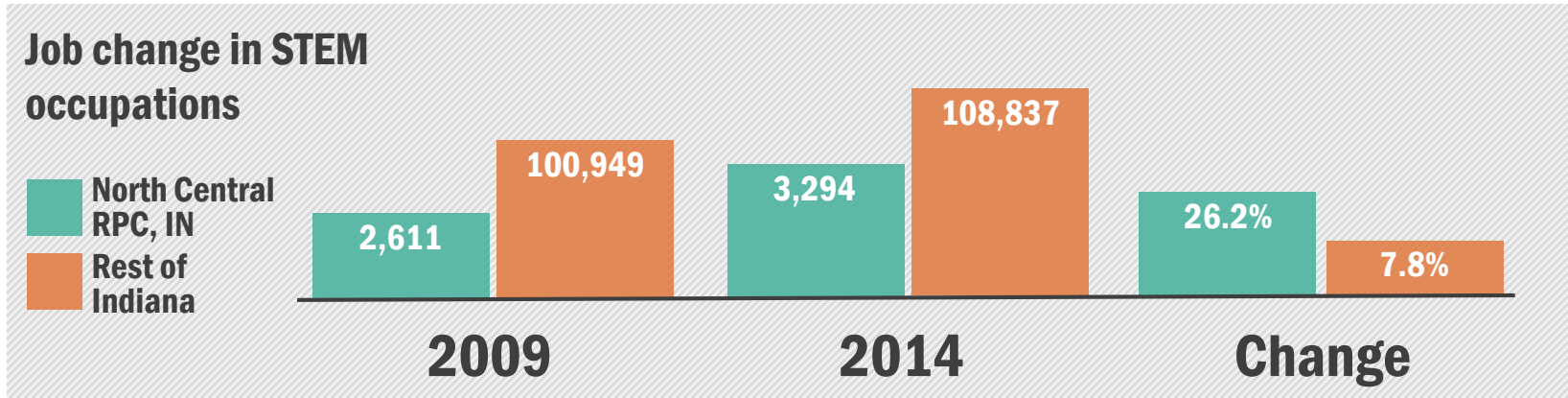


Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

Industry and occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

Report Contributors

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