



Stronger Economies Together

Civic Engagement Forum Mount Rogers

Tuesday, October 20, 2015

10 a.m. – 2:30 p.m.

Mount Rogers Planning Commission Conference Room

1021 Terrace Drive

Marion, VA 24354



Purpose of SET: *Doing Better Together*

Guide the Regional Team
in developing and implementing a

**High Quality Regional
Economic Development Plan**

that builds on the region's current and
emerging economic strengths.



The SET Partners

Mount Rogers Region

State Resource Team

USDA Rural Development

Dr. Basil Gooden, Janice Stroud-Bickes,
Anne Herring, Craig Barbrow, & David Foster

Office of the Secretary of Commerce and Trade

Mary Rae Carter

Virginia Department of Housing & Community Development

Doug Jackson & Michelle Jones

Virginia Rural Center

Christy Morton

Virginia Tourism

Steve Gaylean & Sandra Tanner

Virginia Economic Development Partnership

Liz Povar

Virginia Cooperative Extension – Virginia Tech

Dr. Ed Jones, Dr. Jim Pease, Dr. Mike Lambur, &
Dr. Martha Walker

Virginia Tech Office of Economic Development

Scott Tate

National Team



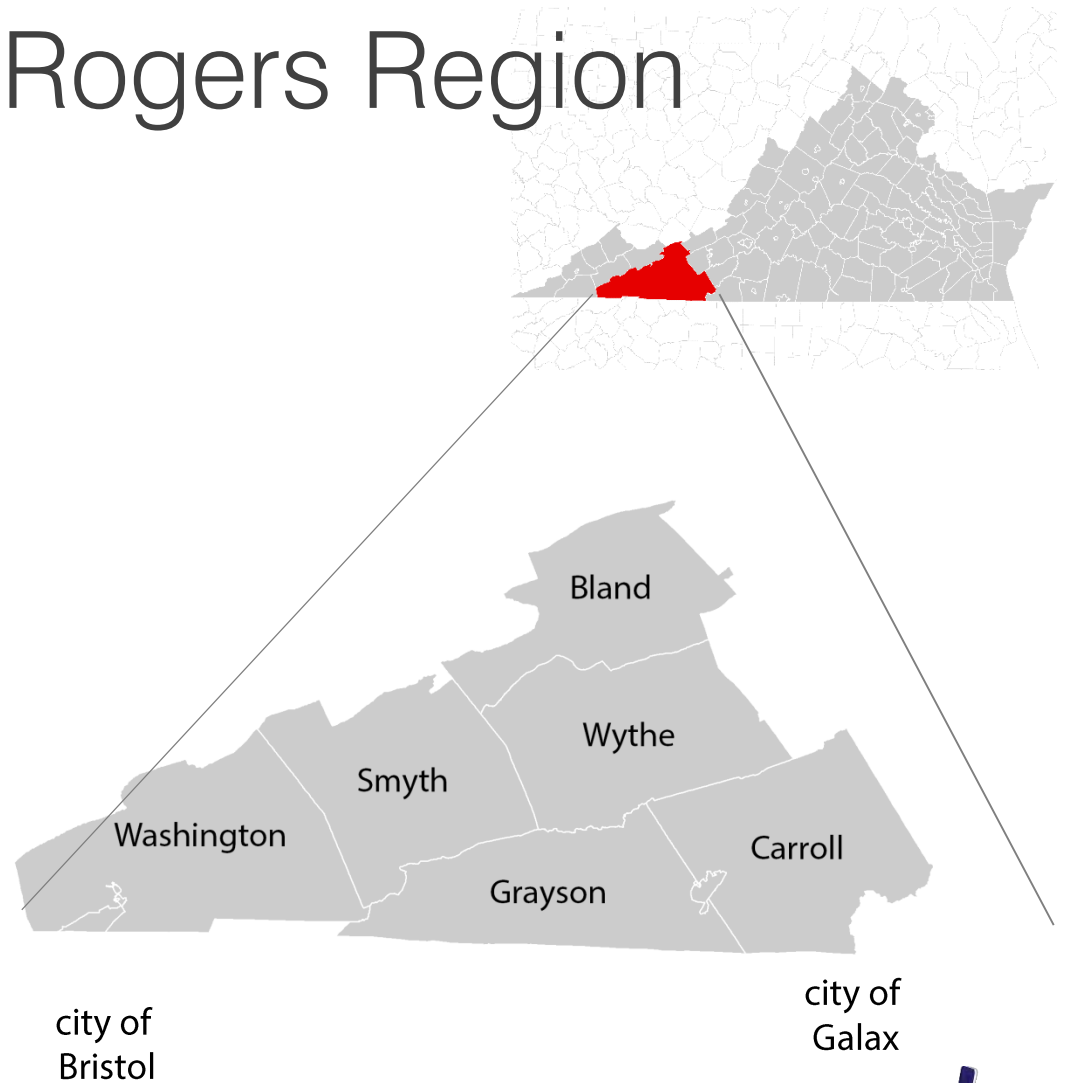
PCRD.PURDUE.EDU

Overview

Mount Rogers Region

The Mount Rogers Region is comprised of six Virginia counties and two cities. Interstate I-81 passes through the central part of the region.

- Bland
- Carroll
- Grayson
- Smyth
- Washington
- Wythe Counties
- city of Bristol
- city of Galax





REGIONAL SNAPSHOT

Mount Rogers Region, Virginia

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01 overview

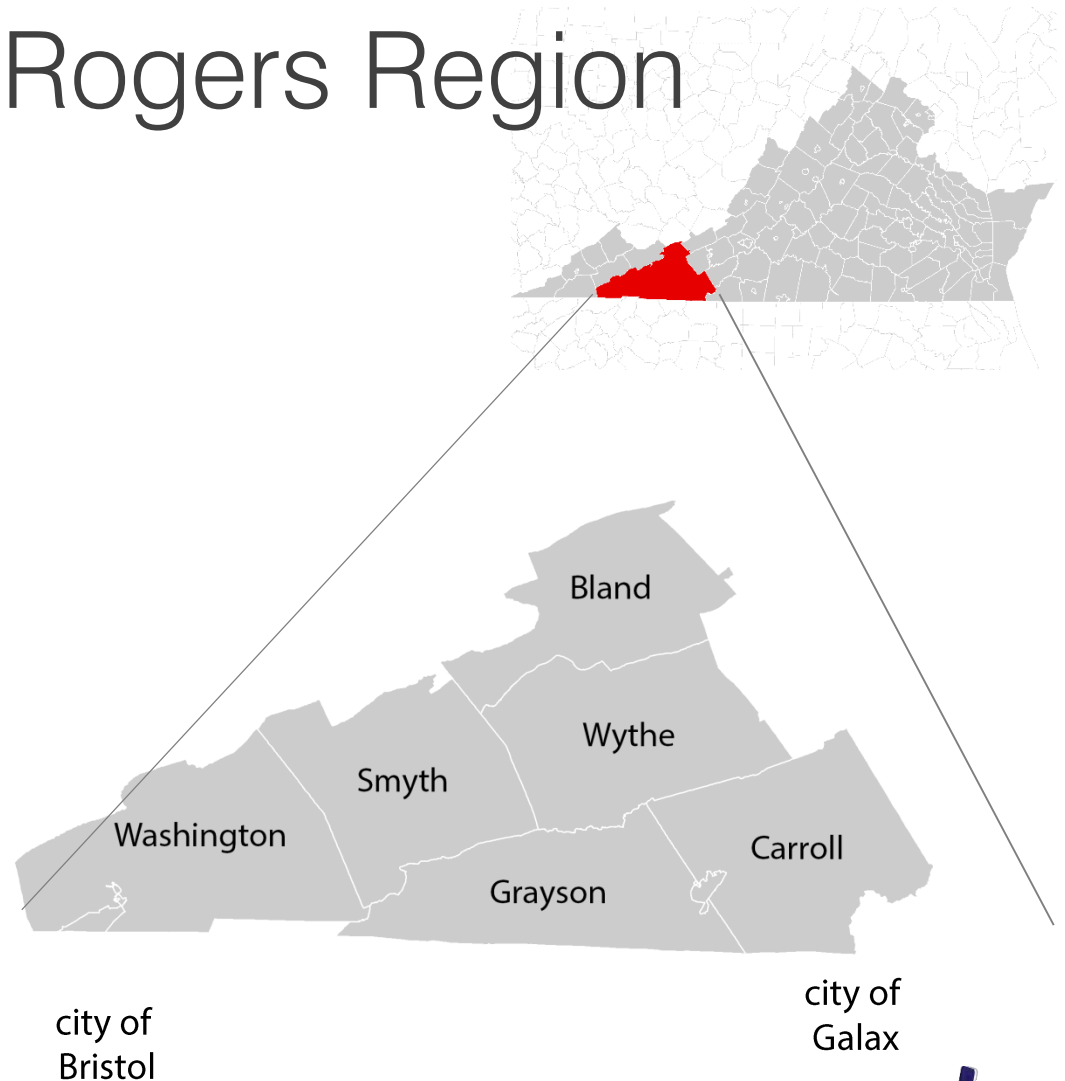
•Mount Rogers Region,
VA

Overview

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Overview

What is a regional snapshot?

What is the snapshot?

This snapshot is a demographic and economic assessment of the Mount Rogers Region in Virginia. Using county-level data, PCRD analyzed a number of indicators to gauge the overall economic performance of the Mount Rogers Region in comparison to the rest of the state.

What is its purpose?

The snapshot is intended to inform the region's leaders, organizations and residents of the key attributes of the region's population and economy. In particular, it takes stock of the region's important assets and challenges. With such data in hand, regional leaders and organizations are in a better position to invest in the mix of strategies that will spur the growth of the economy and provide a higher quality of life for residents of the region.

What are its focus areas?

PCRD secured and analyzed recent data from both public and private sources to generate the snapshot. In order to build a more comprehensive picture of the region, the report presents information under four key categories.

- Demography
- Human Capital
- Labor Force
- Industry & Occupation

When appropriate or relevant, the report compares information on the region with data on the remainder of the state. By so doing, the region is better able to determine how well it is performing relative to the state on a variety of important metrics.

02 demograph y

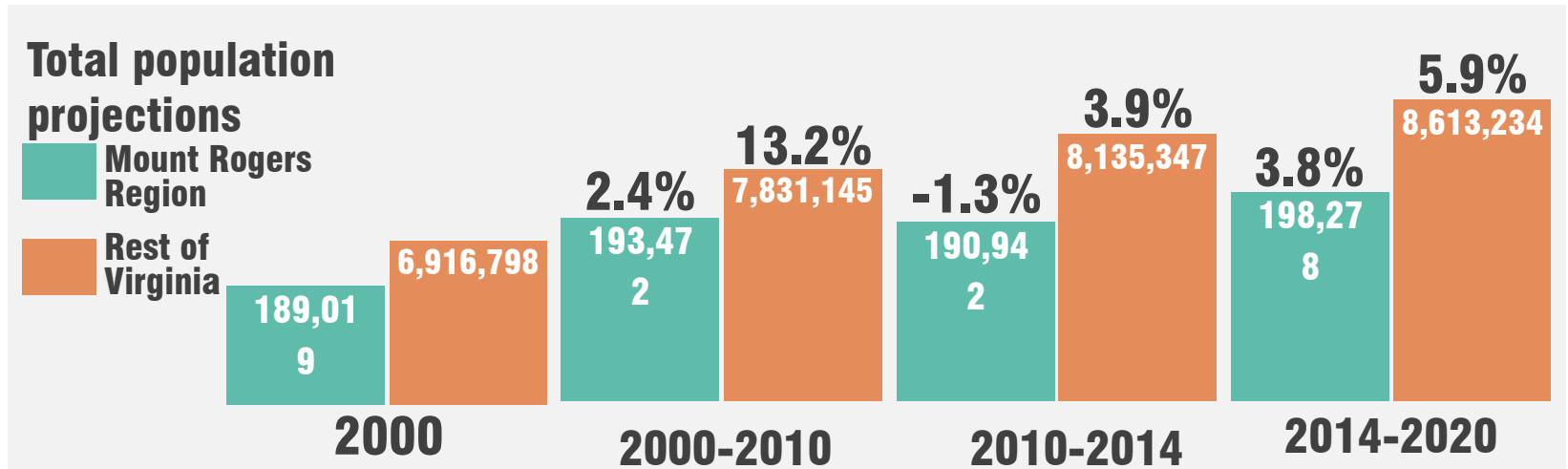
•Population change

•Age structure

•Income and poverty

Demography

Population change



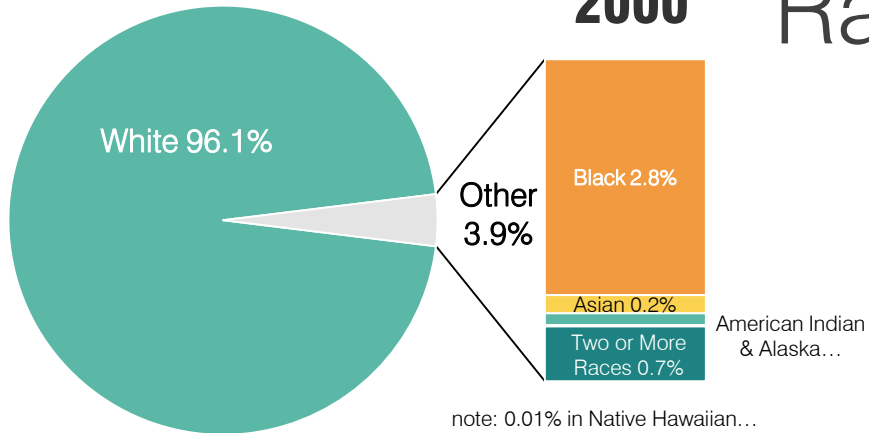
Questions:

- How does the region's population trend compare to that of the state?
- What may be some of the elements driving the trends in the region? In the state?
- What strengths or challenges might these trends present?

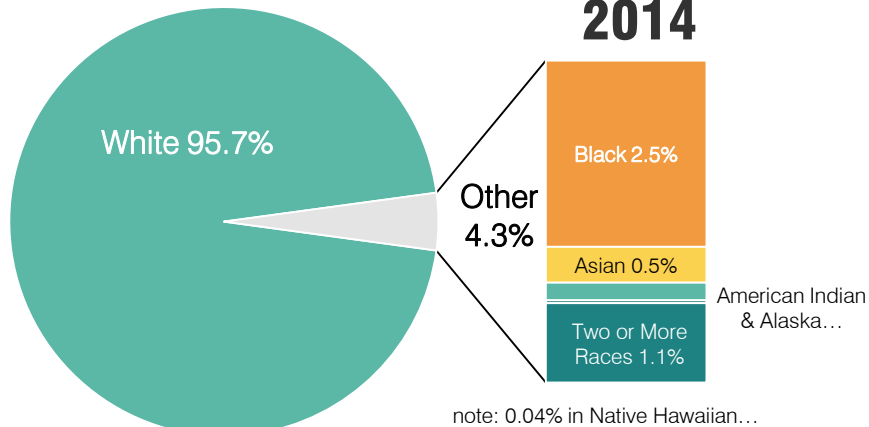
Ethnicity

Race

2000



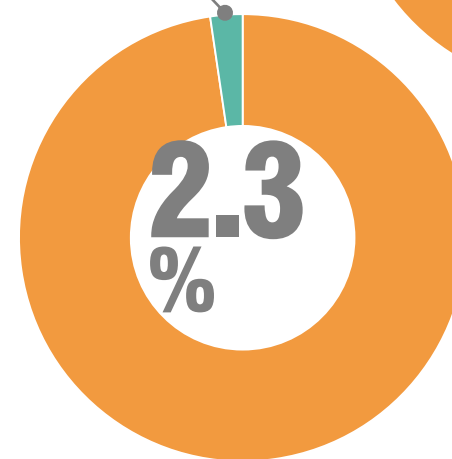
2014



Hispanics - 2000



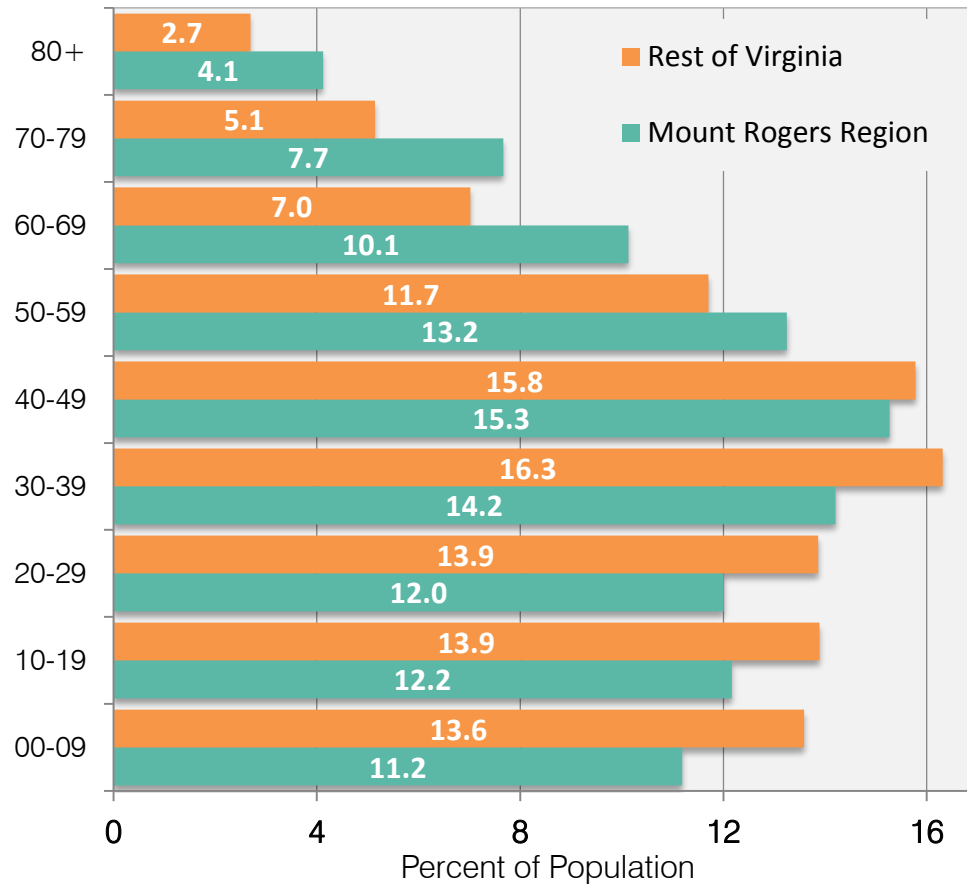
Hispanics - 2014



Demography

Population Age Structure, 2000

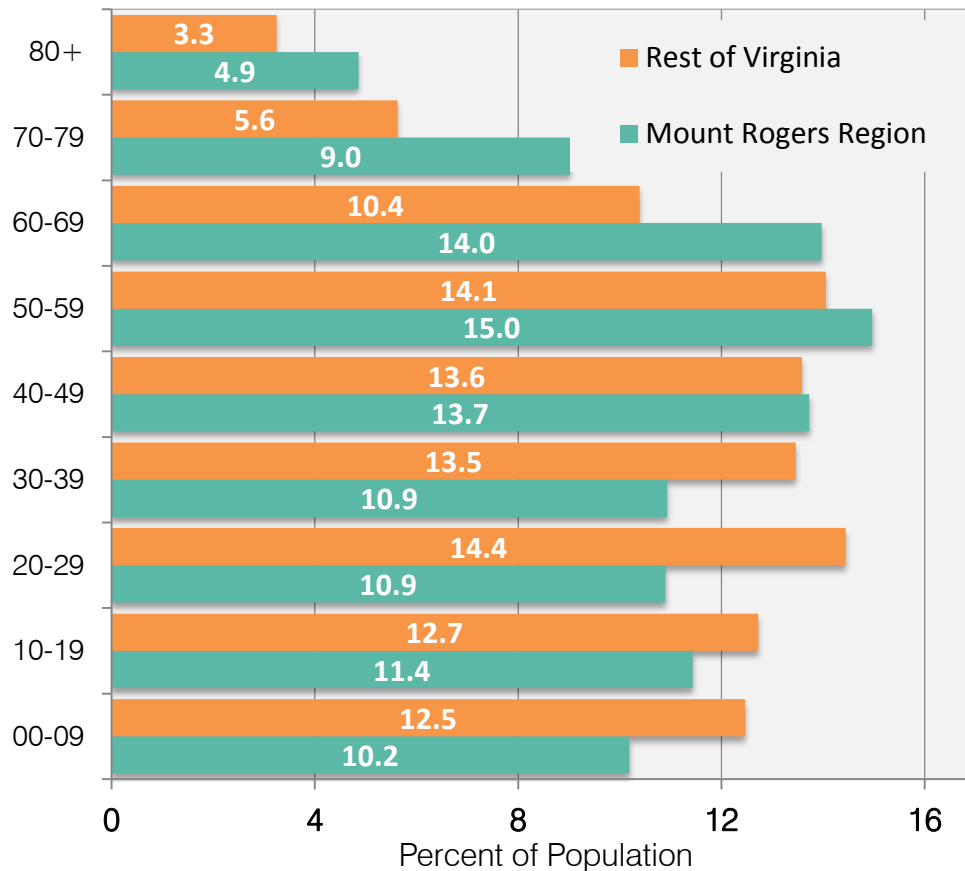
A visual presentation of the age distribution of the population (in percent)



Demography

Population Age Structure, 2014

A visual presentation of the age distribution of the population (in percent)



Questions:

- Is the region experiencing an aging of its population? How does this compare to the rest of the state?
- Is there a sizable number of people of prime working age (20-49 years of age) in the region?
- Is the youth population (under 20 years old) growing or declining?
- What are the implications of the region's age structure for the economic development efforts of the region?

Demography

Income and poverty

	2003	2008	2013
Total Population in Poverty	13.8%	16.1%	16.7%
Minors (Age 0-17) in Poverty	21.5%	23.2%	25.3%
Real Median Household Income* (\$ 2013)	\$40,369	\$39,902	\$38,683

Questions:

- Is the poverty rate for individuals in the county getting better or worse?
- Is poverty for minors in the county lower or higher than the overall poverty rate for all individuals? Why?
- Has real median income (adjusted for inflation) improved or worsened over the 2003 to 2013 time period? What may be reasons for these changes?

section 02

* Note: Regional Median Household income is the population-weighted average of median household income values across the Mount Rogers Virginia counties.
Source: U.S. Census Bureau – Small Area Income and Poverty Estimates (SAIPE)

03 human capital

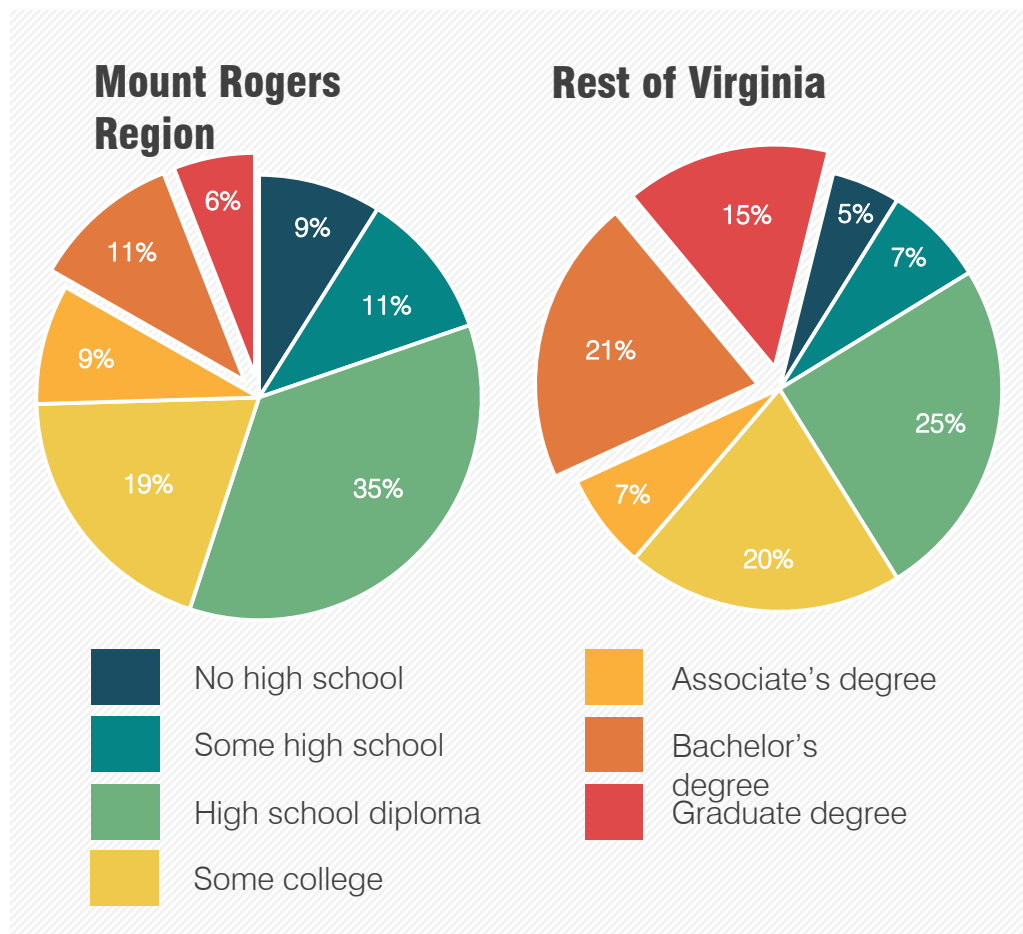
- **Educational attainment**

- **Graduation rates**

- **Patents**

Human capital

Educational attainment, 2013



Questions:

- What proportion of the adult population in the region has only a high school education?
- How many are college graduates (bachelors degree or higher)?
- How does the educational profile of the region compare to that of the rest of the state?
- What are the implications of the educational profile of the region **in terms of the region's** economic opportunities or workforce challenges?

04 labor force

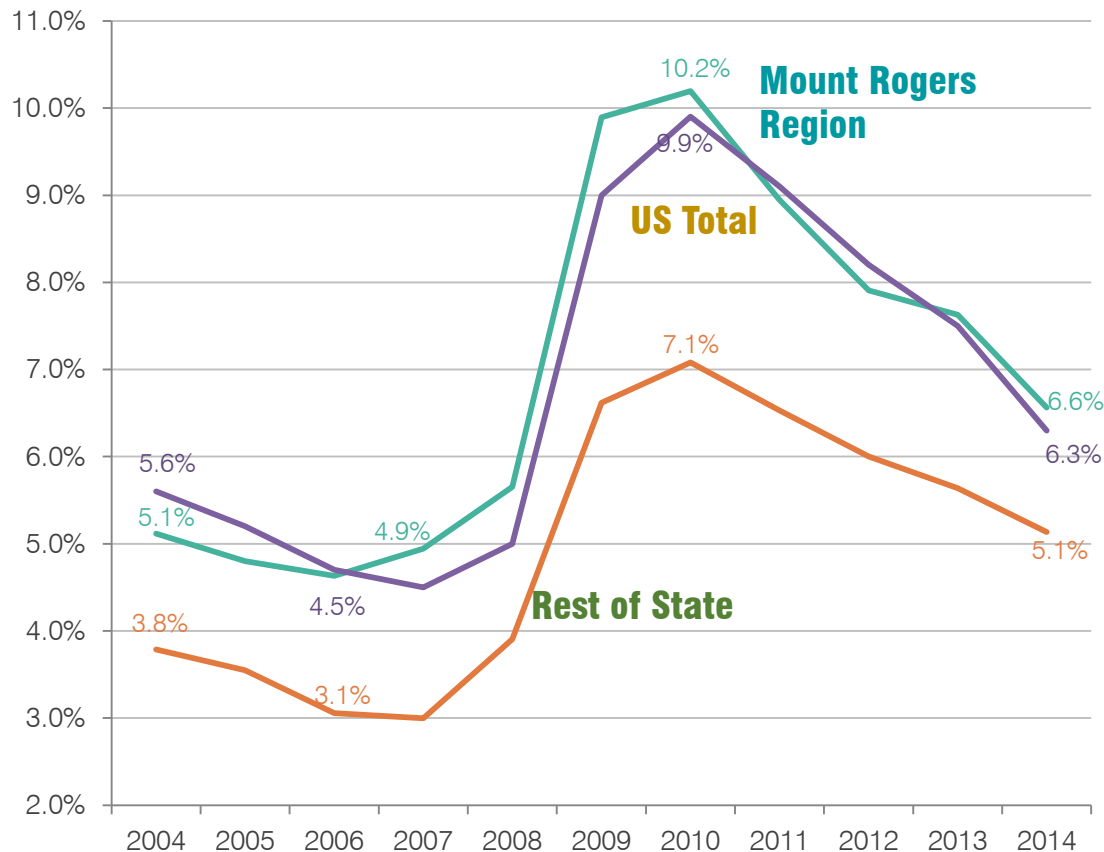
- Unemployment rates

- Earnings per worker

- Source of labor for the region

Labor force

Unemployment rates



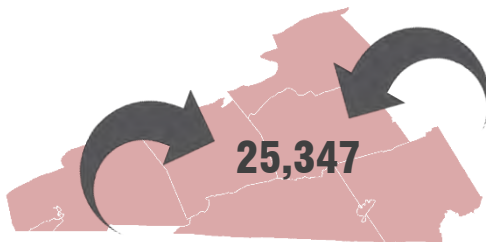
Questions:

- How does the region's unemployment rate compare to the rest of the state and nation?
- How does the region's unemployment peak and post-2009 recovery compare to the state and nation?
- What might this suggest for the region's economic future?

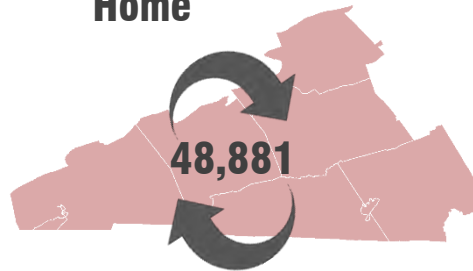
Labor force

Journey to Work

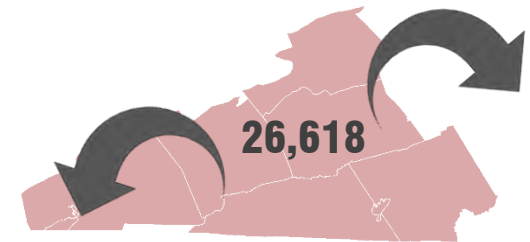
In-Commuters



Same Work/ Home



Out-Commuters



Population	2013 Jobs	Proportion
Employed in Region	74,228	100.0%
Employed in Region but Living Outside	25,347	34.1%
Employed and Living in Region	48,881	65.9%

Population	2013 Jobs	Proportion
Region Residents	75,499	100.0%
Employed Outside Region but Living in Region	26,618	35.3%
Employed and Living in Region	48,881	64.7%

Questions:

- How many people employed in the region actually reside outside the region? How many who live in the region commute to jobs outside the region?
- What are the implications for the region's economic development efforts?

05 industry and occupation

•Establishments

•Employment by industry

•Cluster analysis

•Top occupations

•STEM occupations

Industry and occupation

Establishments

Components of Change for Establishments 2000-2011

Establishments Launched	14,037
Establishments Closed	7,575
Net Change	6,462
Net Migration (Establishments moving into minus establishments moving out of the region)	267
Total Change	6,729

An establishment is a physical business location.

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



Definition of Company



Note: In-migration and Out-migration includes movement within the Mt Rogers region.

section 05

Source: National Establishment Time Series (NETS) – 2011 Database

Establishments

Number of Establishments by Company Stages

	2000		2011	
Stage	Establishments	Proportion	Establishments	Proportion
Stage 0	1,969	24.5%	4,340	29.4%
Stage 1	4,594	57.2%	8,874	60.1%
Stage 2	1,321	16.4%	1,405	9.5%
Stage 3	135	1.7%	136	0.9%
Stage 4	18	0.2%	11	0.1%
Total	8,037	100%	14,766	100%

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Establishments

Number of Jobs by Company Stages

Year	2001	2011	% Change
Stage 0	1,969	4,340	120.4%
Stage 1	17,431	26,559	52.4%
Stage 2	33,686	37,810	12.2%
Stage 3	26,886	26,949	0.2%
Stage 4	7,219	9,322	29.1%
Total	87,191	104,980	20.4%

Sales (\$ 2013) by Company Stages

Year	2001	2011	% Change
Stage 0	225,789,198	292,057,777	29.3%
Stage 1	2,435,780,242	2,185,013,625	-10.3%
Stage 2	3,756,403,934	3,162,230,055	-15.8%
Stage 3	3,481,543,625	2,994,336,968	-14.0%
Stage 4	2,368,702,860	1,485,804,652	-37.3%
Total	12,268,219,860	10,119,443,077	-17.5%

• 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 2002-11 period?

Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
53	Real Estate and Rental and Leasing	2,439	2,970	531	22%	15.0%
52	Finance and Insurance	2,874	3,339	465	16%	14.2%
31	Manufacturing	14,286	14,666	380	3%	-2.1%
72	Accommodation and Food Services	7,084	7,299	215	3%	9.3%
90	Government	15,262	15,449	187	1%	-0.2%
62	Health Care and Social Assistance	9,152	9,290	138	2%	11.4%
61	Educational Services	1,200	1,272	72	6%	13.4%
54	Professional, Scientific, and Technical Services	2,327	2,394	67	3%	1.7%

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 ten industry sector employment change

NAICS	Description	2008 Jobs	2013 Jobs	Change	Change (%)	State Change (%)
23	Construction	5,361	4,526	-835	-16%	-6.9%
56	Administrative and Support and Waste Management and Remediation Services	4,259	3,474	-785	-18%	8.6%
44	Retail Trade	12,275	11,774	-501	-4%	4.0%
81	Other Services (except Public Administration)	5,175	4,941	-234	-5%	8.5%
48	Transportation and Warehousing	2,747	2,558	-189	-7%	4.8%
21	Mining, Quarrying, and Oil and Gas Extraction	739	553	-186	-25%	-3.6%
42	Wholesale Trade	2,576	2,458	-118	-5%	-1.0%
22	Utilities	217	113	-104	-48%	-7.0%
51	Information	819	749	-70	-9%	-9.6%
11	Crop and Animal Production	5,662	5,615	-47	-1%	-1.8%

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?

How can I get involved?

- **Participate in the Discussion Sessions**
 - **Tuesdays . . .**
 - December 8, January 19, February 23, March 22, April 19, May 10
- **Communicate with the Regional Leadership Team**

Rocky Warren, Regional Planner

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rwarren@mrpdc.org

What happens next: Discussions

Civic Engagement Forum

Discussion and brainstorming session on region's strengths, challenges, and data. Respond to the question: What could /should we do to build on the opportunities and manage the challenges? Builds the foundation for future discussions.

Session 1: Exploration of Regional Data

Review Civic Engagement Forum results. Examine economic data (businesses, jobs, clusters) and relevance to proposed actions.

Session 2: Evidence-based Planning

Discussion on bubble chart, shift-share, import substitution, leakages, clusters, C.A.R.E. model. Set economic priorities.

Session 3: Connecting Capitals

Analyze each economic priority in relationship to the Seven Community Capitals, set goals and objectives.

Session 4: Finalizing the Plan

Set the actions that will ensure the successful accomplishment of the regional goals.

Implementation*

*There is potential for inclement weather to postpone a session. The dates in April and May will allow us two scheduled sessions to complete the high-quality plan and begin work on implementation.

Implementation*