

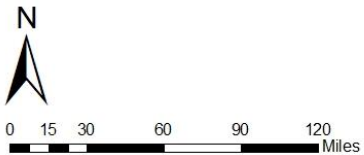
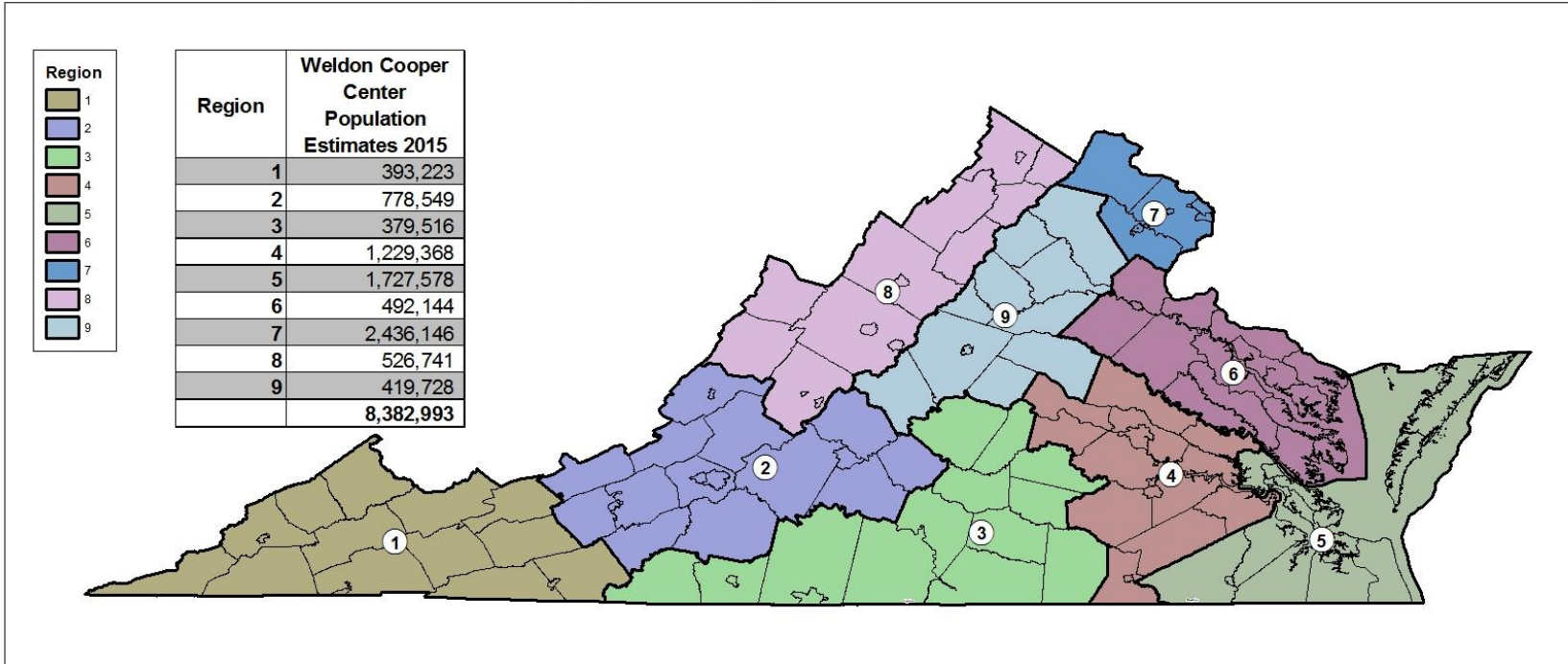


VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

REGIONAL BASELINE MEASURES
REGION 8



GO Virginia Regional Boundaries



Source: US Census, VA PDC



12/5/2016



VIRGINIA INITIATIVE FOR
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IN EACH REGION

Region 8

Counties of:

- Augusta, Bath, Clarke, Frederick, Highland, Page, Rockbridge, Rockingham, Shenandoah, Warren

Cities of:

- Buena Vista, Harrisonburg, Lexington, Staunton, Waynesboro, Winchester



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Data Included

- **Population**
 - Population Trends
- **Income and Wealth**
 - Per Capita Income
 - Percent of Population in Poverty
- **Employment**
 - Total Employment
 - Unemployment Rate
- **Industry**
 - Employment Trends by Industry Sector
 - Relative Concentration (Location Quotients) by Sector
 - Wages by Industry Sector



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Data Included

- **Labor Force**
 - Labor Force Participation Rate
 - Commuting inflow/outflow
 - Educational Attainment
- **Firm Growth**
 - Jobs Created by Young Companies (5 years old or less)
 - Jobs Created by Small Companies (less than 20 employees)
 - Sole Proprietorships



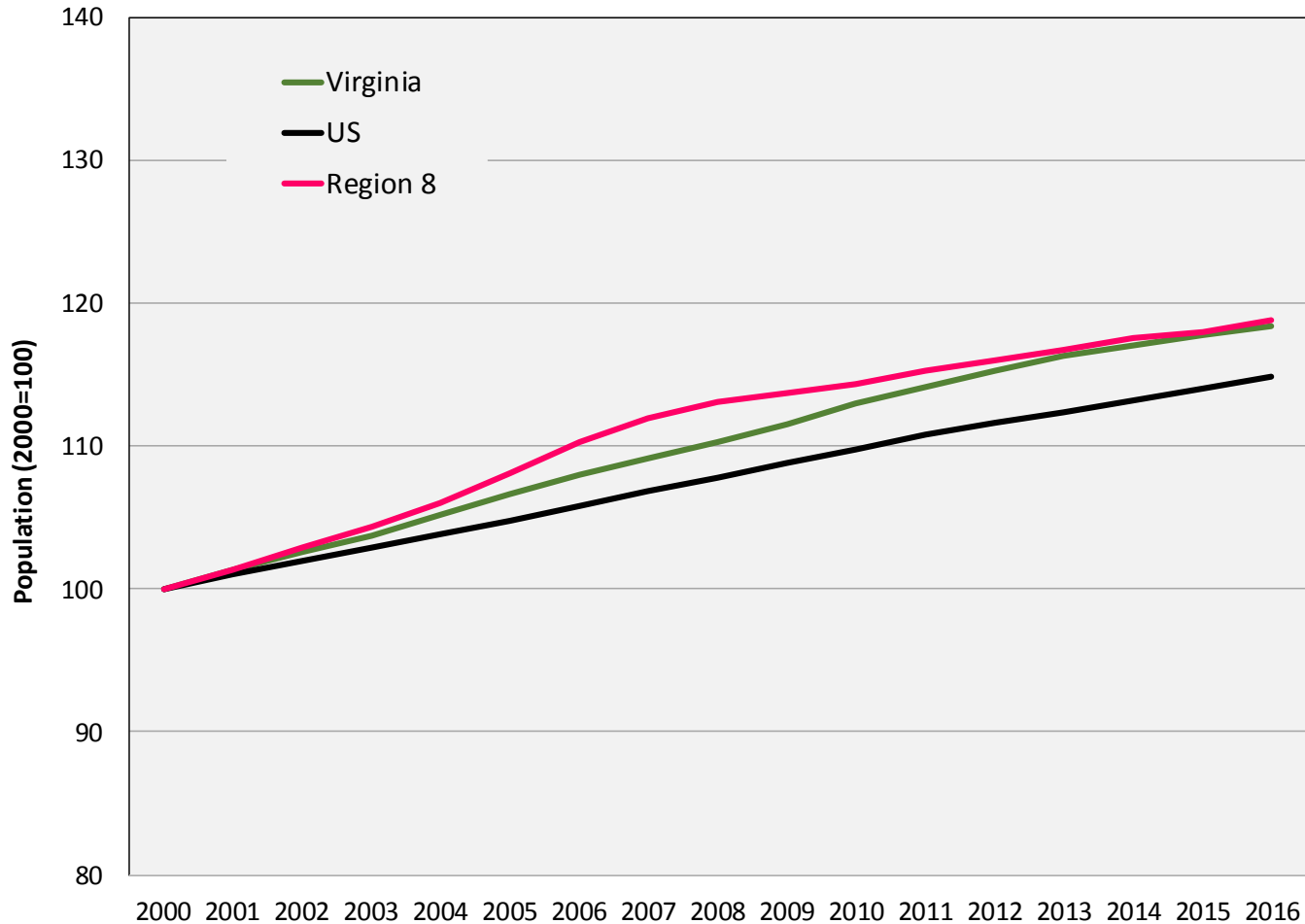
VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Population



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Population Trends



Source: US Census Bureau, Population Estimates Programs



Population Trends

Population Trends: Region 8

	2000	2010	2016	Annual Growth (00-10)	Annual Growth (10-16)
United States	281,424,600	308,745,538	323,127,513	0.9%	0.8%
Virginia	7,105,817	8,025,773	8,411,808	1.2%	0.8%
Region 8	445,222	509,185	528,945	1.4%	0.6%
Augusta	65,572	73,475	74,997	1.1%	0.3%
Bath	5,020	4,713	4,476	-0.6%	-0.9%
Clarke	12,672	14,038	14,374	1.0%	0.4%
Frederick	59,639	78,584	84,421	2.8%	1.2%
Highland	2,529	2,294	2,216	-1.0%	-0.6%
Page	23,149	24,053	23,654	0.4%	-0.3%
Rockbridge	20,835	22,294	22,392	0.7%	0.1%
Rockingham	67,977	76,368	79,744	1.2%	0.7%
Shenandoah	35,240	42,058	43,175	1.8%	0.4%
Warren	31,690	37,515	39,155	1.7%	0.7%
Buena Vista city	6,381	6,647	6,452	0.4%	-0.5%
Harrisonburg city	40,437	49,046	53,078	1.9%	1.3%
Lexington city	6,825	7,060	7,045	0.3%	0.0%
Staunton city	23,896	23,833	24,363	0.0%	0.4%
Waynesboro city	19,661	21,043	21,887	0.7%	0.7%
Winchester city	23,699	26,164	27,516	1.0%	0.8%

Source: US Census Bureau, Population Estimates Programs



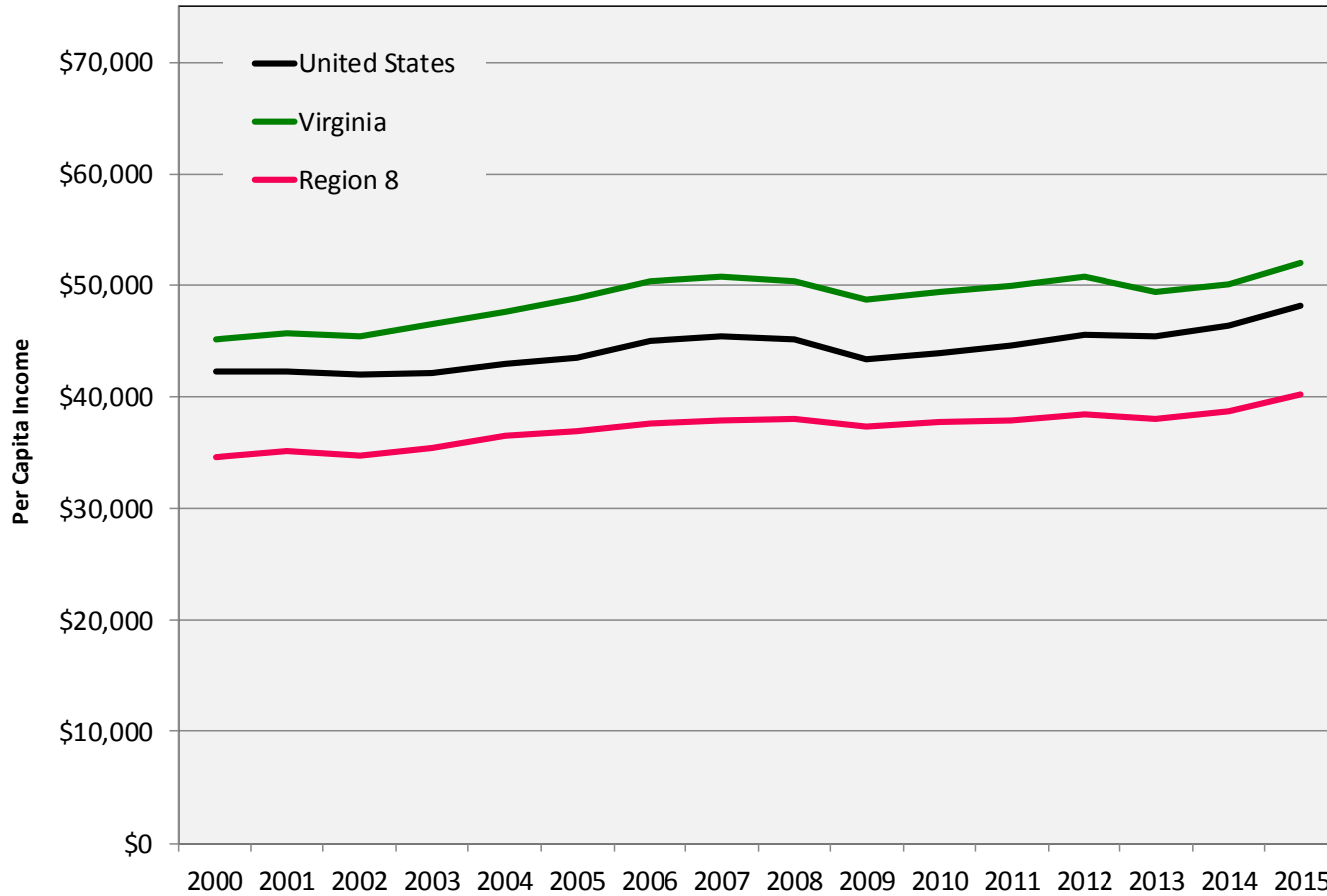
VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Income and Wealth



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Per Capita Income



Source: US Bureau of Economic Analysis, PCI adjusted for 2015 dollars



Per Capita Income

Per Capita Income: Region 8

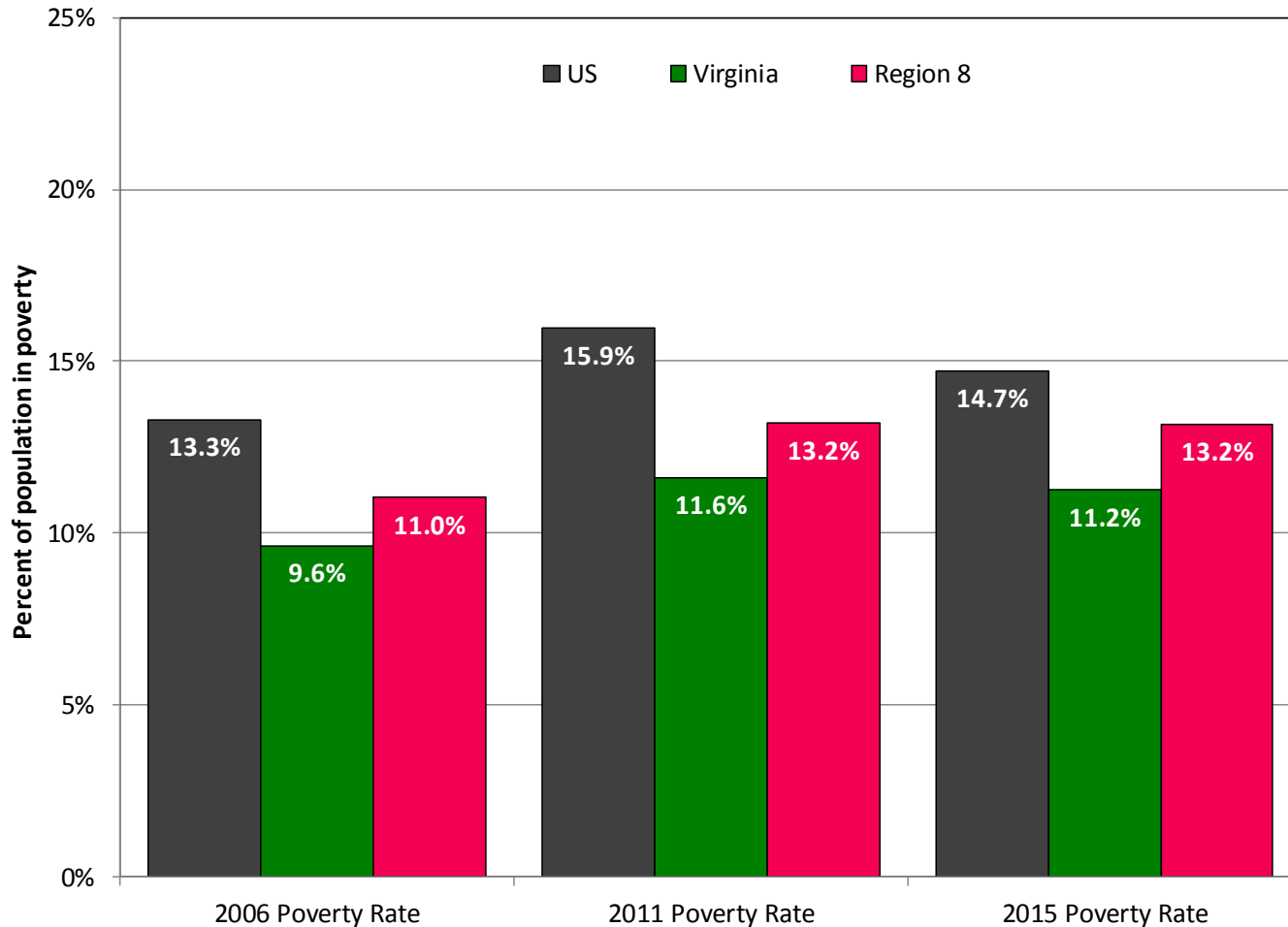
	2000	2010	2015	Annual Growth (00-10)	Annual Growth (10-15)
United States	\$42,231	\$43,902	\$48,112	0.4%	1.5%
Virginia	\$45,144	\$49,421	\$52,052	0.9%	0.9%
Region 8	\$34,680	\$37,757	\$40,199	0.9%	1.0%
Augusta, Staunton + Waynesboro, VA*	\$34,410	\$38,511	\$40,000	1.1%	0.6%
Bath	\$37,210	\$41,488	\$50,326	1.1%	3.3%
Clarke	\$43,606	\$54,321	\$56,372	2.2%	0.6%
Frederick + Winchester, VA*	\$39,064	\$42,120	\$44,871	0.8%	1.1%
Highland	\$33,031	\$37,000	\$44,498	1.1%	3.1%
Page	\$30,660	\$33,420	\$35,766	0.9%	1.1%
Rockbridge, Buena Vista + Lexington, VA*	\$31,457	\$34,371	\$37,210	0.9%	1.3%
Rockingham + Harrisonburg, VA*	\$31,981	\$33,040	\$35,700	0.3%	1.3%
Shenandoah	\$34,021	\$36,218	\$39,291	0.6%	1.4%
Warren	\$36,601	\$40,095	\$41,815	0.9%	0.7%

Source: US Bureau of Economic Analysis, PCI adjusted for 2015 dollars



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Percent of Population in Poverty



Source: US Census Bureau, Small Area Income and Poverty Estimates



Percent of Population in Poverty

Poverty Trends: Region 8

	2006 Poverty Rate	2011 Poverty Rate	2015 Poverty Rate
United States	13.3%	15.9%	14.7%
Virginia	9.6%	11.6%	11.2%
Region 8	11.0%	13.2%	13.2%
Augusta	8.3%	10.0%	9.3%
Bath	8.4%	10.8%	10.3%
Clarke	6.4%	8.2%	8.4%
Frederick	7.1%	8.9%	7.7%
Highland	12.9%	13.8%	13.8%
Page	13.0%	17.1%	15.0%
Rockbridge	12.0%	12.9%	12.8%
Rockingham	8.7%	9.6%	11.0%
Shenandoah	8.3%	13.4%	11.5%
Warren	9.6%	10.4%	10.8%
Buena Vista city	12.5%	15.1%	17.3%
Harrisonburg city	28.1%	27.0%	30.9%
Lexington city	20.8%	22.8%	22.9%
Staunton city	13.7%	16.0%	15.2%
Waynesboro city	12.4%	18.0%	16.0%
Winchester city	13.9%	17.8%	17.8%

Source: US Census Bureau, Small Area Income and Poverty Estimates



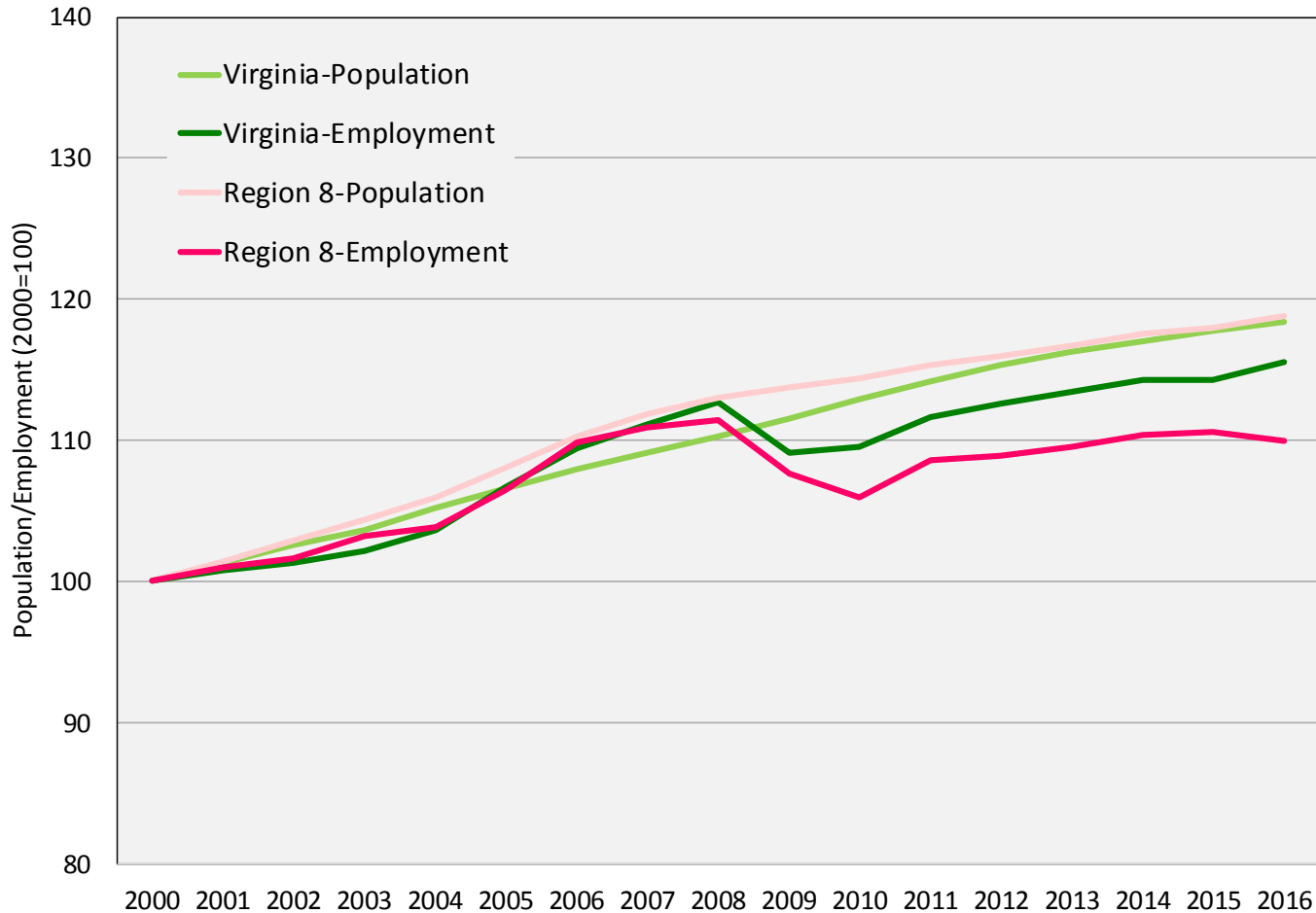
VIRGINIA INITIATIVE FOR
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IN EACH REGION

Employment



VIRGINIA INITIATIVE FOR
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IN EACH REGION

Total Employment



Source: US Census Bureau Population Estimates, US Bureau of Labor Statistics Local Area Unemployment Statistics (2016 preliminary)



Total Employment

Employment Trends: Region 8

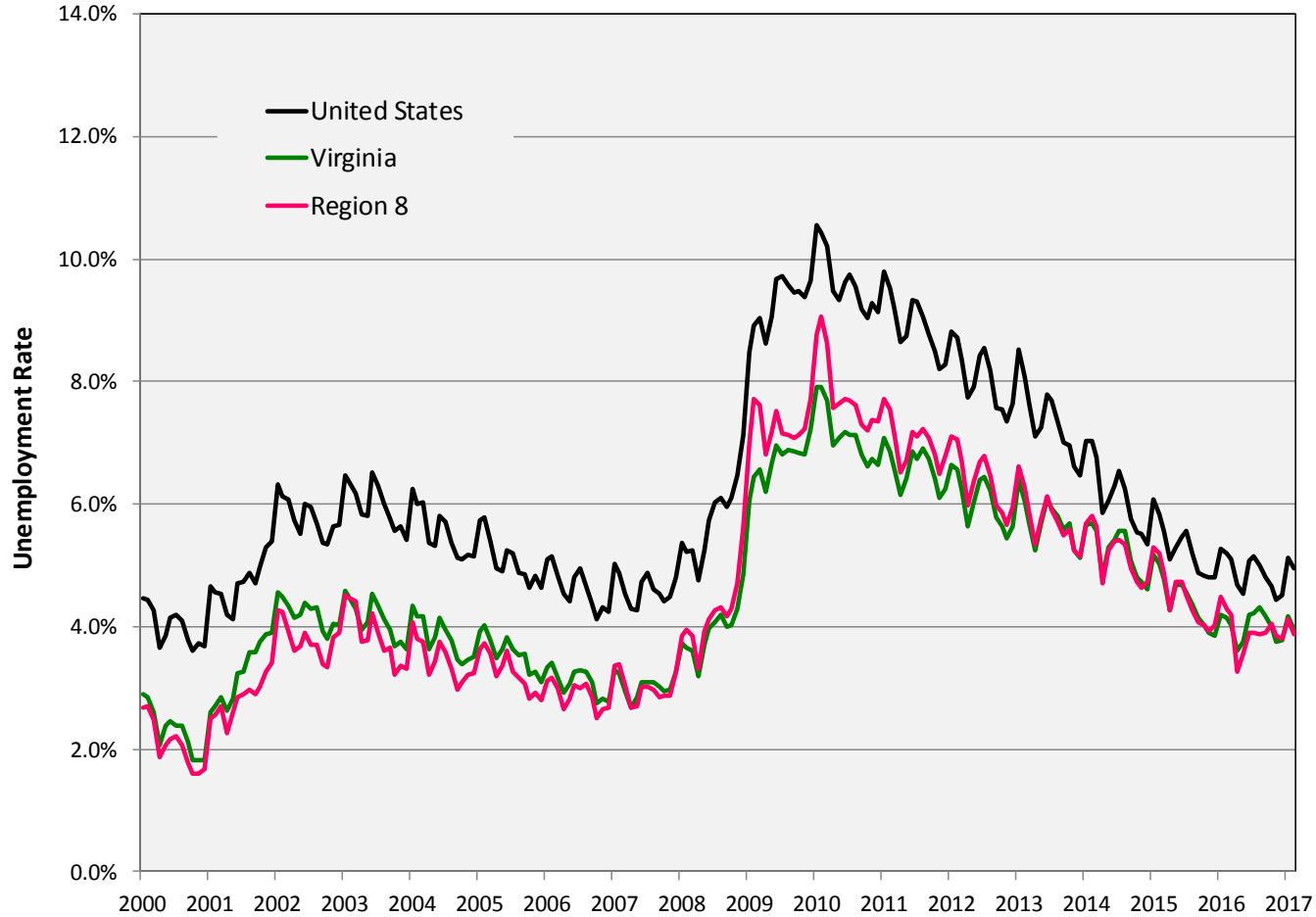
	2000	2010	2016	Annual Growth (00-10)	Annual Growth (10-16)
United States	136,891,000	139,064,000	151,436,000	0.2%	1.4%
Virginia	3,522,865	3,860,386	4,070,260	0.9%	0.9%
Region 8	226,064	239,612	248,553	0.6%	0.6%
Augusta	33,919	34,481	34,491	0.2%	0.0%
Bath	2,664	2,320	2,422	-1.4%	0.7%
Clarke	6,798	7,181	7,270	0.5%	0.2%
Frederick	32,247	38,832	43,693	1.9%	2.0%
Highland	1,138	1,355	1,251	1.8%	-1.3%
Page	11,474	10,900	10,793	-0.5%	-0.2%
Rockbridge	10,442	10,303	9,307	-0.1%	-1.7%
Rockingham	35,508	37,656	37,918	0.6%	0.1%
Shenandoah	18,179	19,117	20,302	0.5%	1.0%
Warren	16,245	18,480	19,024	1.3%	0.5%
Buena Vista city	3,152	2,925	2,948	-0.7%	0.1%
Harrisonburg city	19,206	21,250	22,512	1.0%	1.0%
Lexington city	2,163	2,086	1,894	-0.4%	-1.6%
Staunton city	11,393	10,920	11,250	-0.4%	0.5%
Waynesboro city	8,912	9,255	9,398	0.4%	0.3%
Winchester city	12,624	12,551	14,082	-0.1%	1.9%

Source: US BLS Local Area Unemployment Statistics (2016 preliminary)



VIRGINIA INITIATIVE FOR
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IN EACH REGION

Unemployment Rate



Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics



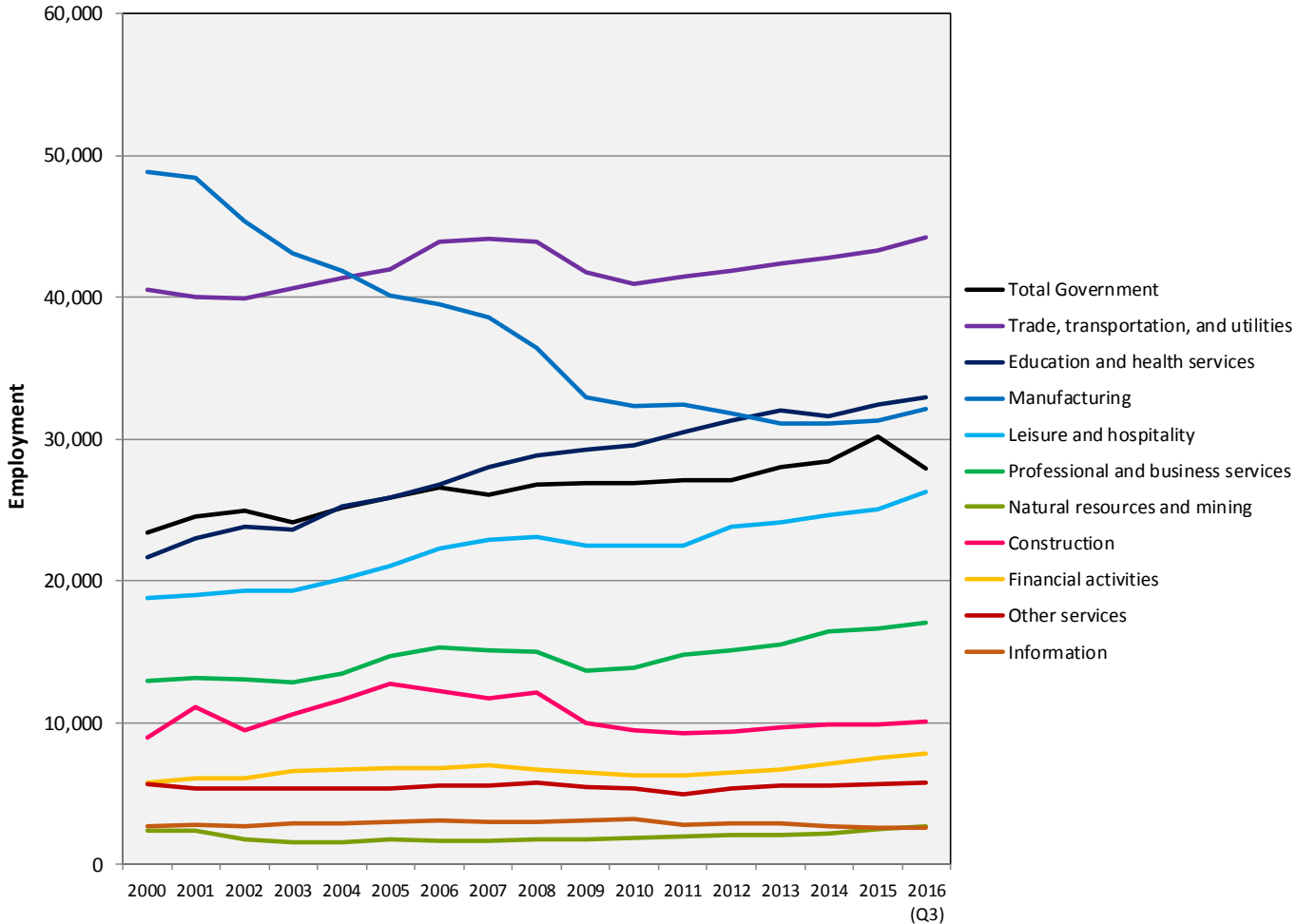
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Industry



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IN EACH REGION

Employment Trends by Industry Sector



Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages



Employment Trends by Industry Sector

Region 8: Industry Sectors, 2015*

Sector	Employment#	LQ	Region 8 Avg Wage	US Avg Wage
Trade, transportation, and utilities	43,349	1.06	\$33,834	\$44,321
Education and health services	32,424	1.01	\$44,275	\$47,383
Manufacturing	31,308	1.67	\$50,136	\$64,305
Leisure and hospitality	25,079	1.09	\$16,067	\$21,807
Local government	19,683	0.93	\$36,292	\$47,573
Professional and business services	16,657	0.56	\$45,904	\$69,270
Construction	9,843	1.00	\$42,112	\$57,009
Financial activities	7,452	0.62	\$48,566	\$87,915
Other services	5,648	0.86	\$29,611	\$35,116
State government	4,972	0.71	\$39,098	\$55,878
Federal government	3,182	0.76	\$75,576	\$77,900
Information	2,598	0.62	\$51,829	\$95,098
Natural resources and mining	2,447	0.80	\$31,398	\$58,461

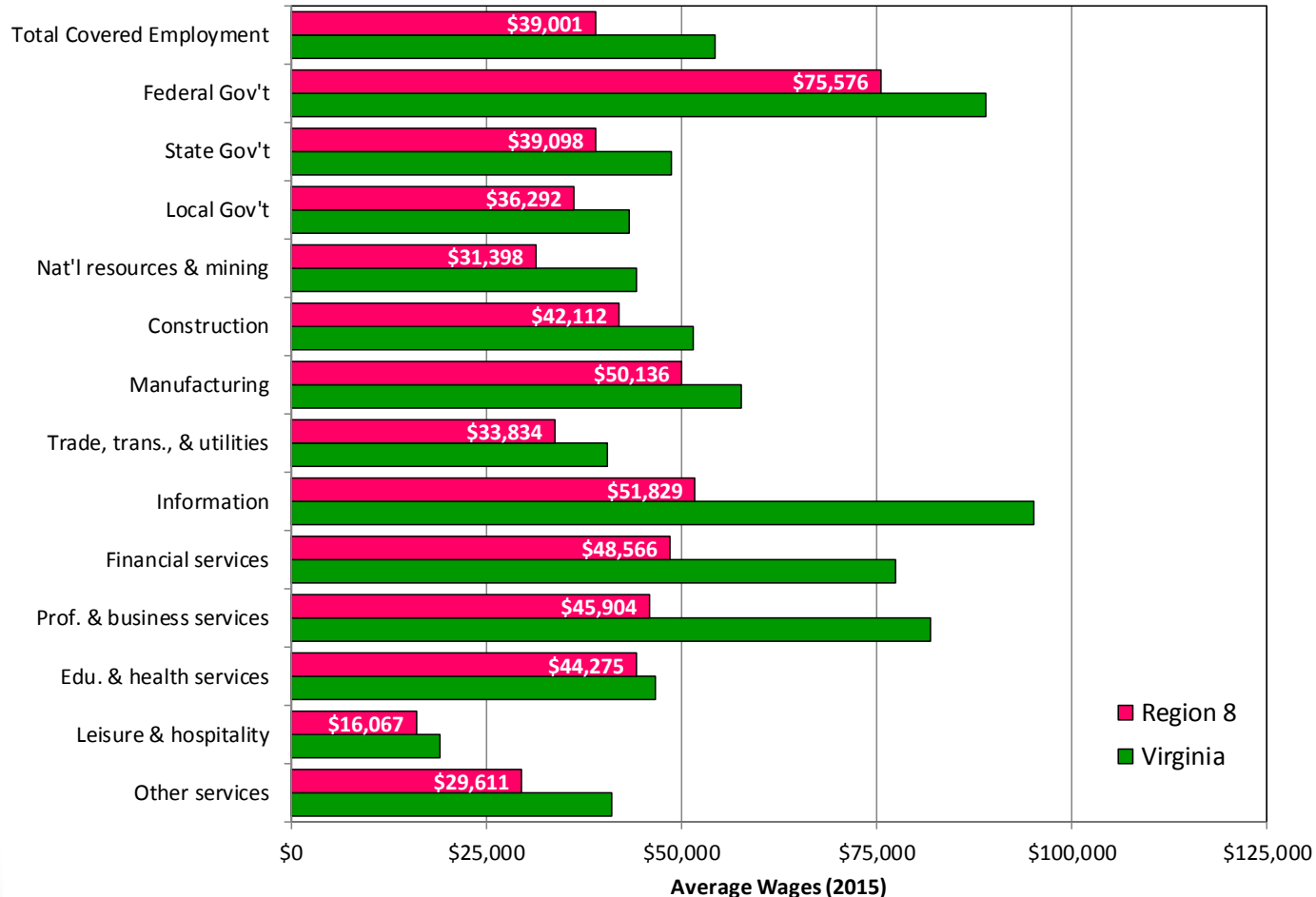
Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

*2015 is the most recently available complete year

#Does not include suppressed employment



Industry Wages by Sector



Source: US Bureau of Labor Statistics, Quarterly Census of Employment and Wages



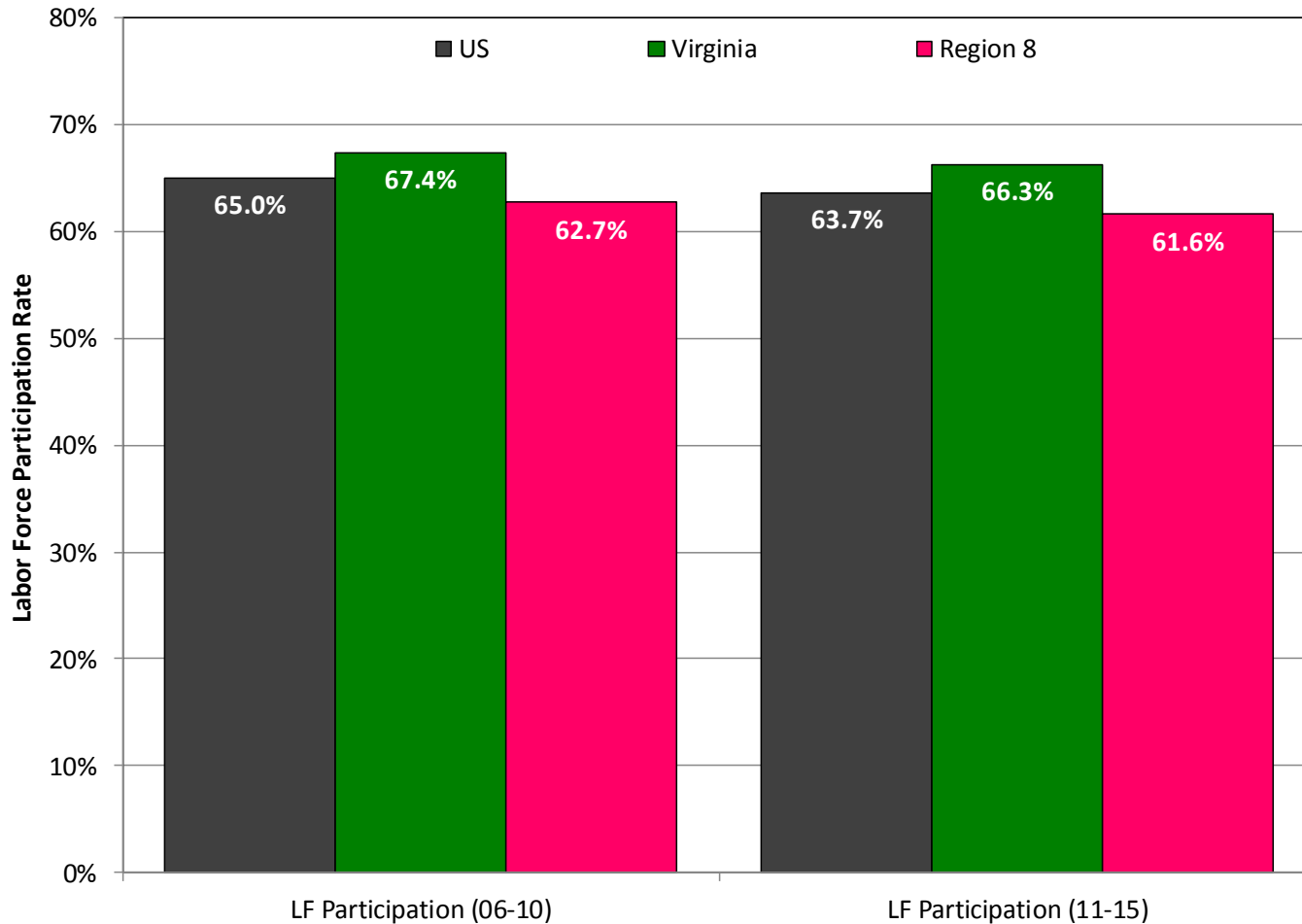
VIRGINIA INITIATIVE FOR
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IN EACH REGION

Labor Force



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IN EACH REGION

Labor Force Participation Rate



Source: US Census Bureau, 2006-2010 and 2011-2015 American Community Surveys



Labor Force Participation Rate

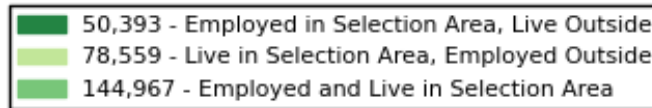
Labor Force Participation Rate: Region 8

	LF Participation (06-10)	LF Participation (11-15)
United States	65.0%	63.7%
Virginia	67.4%	66.3%
Region 8	62.7%	61.6%
Augusta	60.5%	59.2%
Bath	61.0%	64.6%
Clarke	66.6%	62.7%
Frederick	68.2%	67.6%
Highland	54.1%	51.9%
Page	61.0%	58.3%
Rockbridge	61.0%	54.1%
Rockingham	65.9%	64.9%
Shenandoah	63.3%	61.8%
Warren	69.6%	65.7%
Buena Vista city	64.8%	55.9%
Harrisonburg city	52.0%	58.5%
Lexington city	33.8%	35.5%
Staunton city	60.4%	59.4%
Waynesboro city	60.3%	61.0%
Winchester city	69.9%	63.3%

Source: US Census Bureau, 2006-2010 and 2011-2015 American Community Surveys

Commuting (Inflow/Outflow)

Inflow/Outflow Job Counts in 2014



Inflow/Outflow Job Counts (Primary Jobs): Region 8

	2014	
	Count	Share
Employed in the Selection Area	195,360	100.00%
Employed in the Selection Area but Living Outside	50,393	25.80%
Employed and Living in the Selection Area	144,967	74.20%
Living in the Selection Area	223,526	100.00%
Living in the Selection Area but Employed Outside	78,559	35.10%
Living and Employed in the Selection Area	144,967	64.90%

Source: US Census Bureau, Longitudinal Employer-Household Dynamics OnTheMap, 2014



Commuting (Inflow/Outflow)

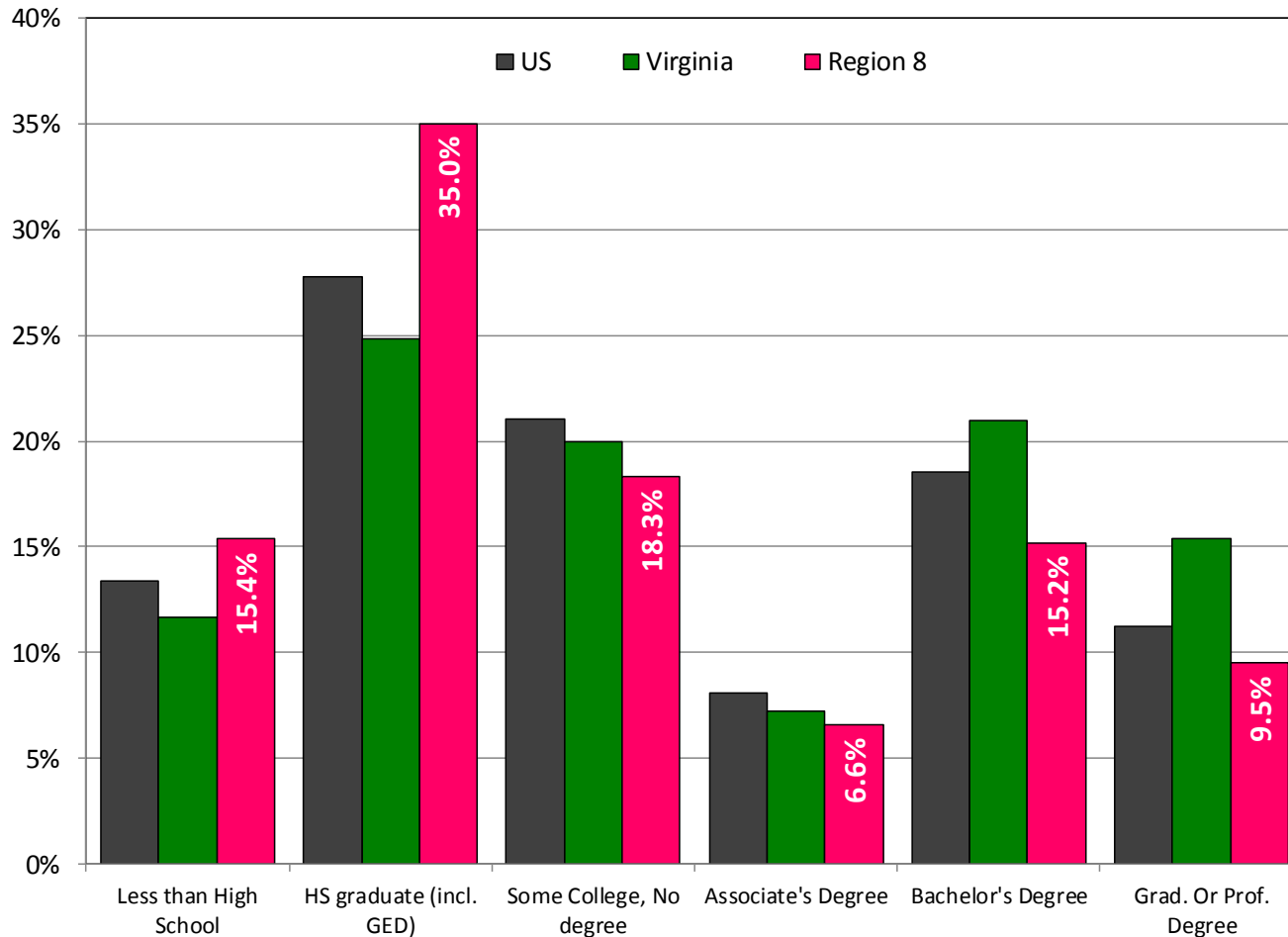
Commuting Patterns: Region 8

	Employed in Selection Area	Employed in the Selection Area but Living Outside		Employed and Living in the Selection Area		Living in the Selection Area	Living in the Selection Area but Employed Outside		Living and Employed in the Selection Area	
Virginia	3,313,939	286,033	8.6%	3,027,906	91.4%	3,377,666	349,760	10.4%	3,027,906	89.6%
Region 8	195,360	50,393	25.8%	144,967	74.2%	223,526	78,559	35.1%	144,967	64.9%
Augusta	22,588	12,019	53.2%	10,569	46.8%	32,448	21,879	67.4%	10,569	32.6%
Bath	1,903	953	50.1%	950	49.9%	2,290	1,340	58.5%	950	41.5%
Clarke	3,465	2,542	73.4%	923	26.6%	6,923	6,000	86.7%	923	13.3%
Frederick	22,812	14,808	64.9%	8,004	35.1%	35,358	27,354	77.4%	8,004	22.6%
Highland	711	421	59.2%	290	40.8%	1,215	925	76.1%	290	23.9%
Page	4,741	1,638	34.5%	3,103	65.5%	9,840	6,737	68.5%	3,103	31.5%
Rockbridge	5,231	3,007	57.5%	2,224	42.5%	8,858	6,634	74.9%	2,224	25.1%
Rockingham	26,286	14,409	54.8%	11,877	45.2%	37,703	25,826	68.5%	11,877	31.5%
Shenandoah	12,720	6,092	47.9%	6,628	52.1%	17,312	10,684	61.7%	6,628	38.3%
Warren	11,477	6,942	60.5%	4,535	39.5%	18,150	13,615	75.0%	4,535	25.0%
Buena Vista city	2,620	1,765	67.4%	855	32.6%	2,797	1,942	69.4%	855	30.6%
Harrisonburg city	48,737	33,834	69.4%	14,903	30.6%	51,436	36,533	71.0%	14,903	29.0%
Lexington city	3,625	2,920	80.6%	705	19.4%	1,946	1,241	63.8%	705	36.2%
Staunton city	10,999	8,302	75.5%	2,697	24.5%	10,194	7,497	73.5%	2,697	26.5%
Waynesboro city	9,861	7,745	78.5%	2,116	21.5%	9,228	7,112	77.1%	2,116	22.9%
Winchester city	24,669	20,947	84.9%	3,722	15.1%	11,325	7,603	67.1%	3,722	32.9%

Source: US Census Bureau, Longitudinal Employer-Household Dynamics OnTheMap, 2014



Educational Attainment



Source: US Census Bureau, 2011-2015 American Community Survey



Educational Attainment

Educational Attainment: Region 8

	2006-2010						2011-2015					
	Less than High School	HS graduate (incl. GED)	Some College, No degree	Associate's Degree	Bachelor's Degree	Grad. Or Prof. Degree	Less than High School	HS graduate (incl. GED)	Some College, No degree	Associate's Degree	Bachelor's Degree	Grad. Or Prof. Degree
United States	14.9%	29.0%	20.6%	7.5%	17.6%	10.3%	13.3%	27.8%	21.1%	8.1%	18.5%	11.2%
Virginia	13.9%	26.0%	19.6%	6.7%	19.9%	13.9%	11.7%	24.8%	19.9%	7.3%	21.0%	15.4%
Region 8	19.1%	35.9%	17.2%	5.5%	14.0%	8.3%	15.4%	35.0%	18.3%	6.6%	15.2%	9.5%
Augusta	16.3%	42.1%	17.3%	5.1%	13.4%	5.7%	14.0%	40.1%	17.5%	6.3%	14.7%	7.3%
Bath	20.8%	47.3%	17.2%	3.1%	7.4%	4.1%	12.1%	38.9%	22.6%	4.7%	12.6%	9.2%
Clarke	12.5%	31.3%	20.3%	6.7%	17.2%	11.9%	12.3%	28.0%	20.9%	7.8%	18.1%	12.9%
Frederick	16.9%	33.2%	19.9%	6.9%	14.3%	8.7%	12.6%	30.5%	20.0%	7.9%	18.4%	10.7%
Highland	26.4%	36.9%	11.3%	4.1%	13.5%	7.8%	16.3%	38.6%	18.9%	4.5%	14.6%	7.0%
Page	27.5%	42.1%	15.0%	4.3%	7.4%	3.8%	22.9%	42.9%	16.7%	4.7%	8.1%	4.7%
Rockbridge	20.4%	35.1%	16.8%	6.0%	14.2%	7.5%	14.2%	36.3%	18.0%	6.0%	13.8%	11.6%
Rockingham	22.1%	36.6%	13.9%	5.4%	13.7%	8.2%	18.7%	35.5%	16.5%	5.5%	14.4%	9.4%
Shenandoah	17.3%	40.0%	19.8%	5.4%	11.0%	6.5%	15.5%	39.5%	19.9%	6.1%	12.2%	6.8%
Warren	16.7%	36.7%	19.7%	5.5%	13.2%	8.1%	14.5%	36.6%	19.4%	8.8%	13.9%	6.7%
Buena Vista city	27.3%	34.4%	15.7%	6.2%	9.7%	6.8%	18.1%	40.5%	18.5%	6.4%	11.0%	5.5%
Harrisonburg city	22.6%	24.2%	15.3%	4.6%	19.3%	14.0%	15.9%	26.5%	15.9%	5.9%	20.6%	15.2%
Lexington city	18.8%	20.9%	13.3%	2.7%	20.6%	23.7%	20.0%	18.1%	14.7%	3.4%	22.5%	21.4%
Staunton city	17.3%	32.1%	17.3%	4.8%	18.2%	10.3%	12.8%	30.9%	18.3%	6.6%	18.8%	12.5%
Waynesboro city	18.9%	37.9%	16.5%	5.0%	13.9%	7.9%	15.1%	38.5%	21.6%	6.4%	11.7%	6.7%
Winchester city	20.4%	27.8%	16.4%	5.8%	16.8%	12.9%	15.8%	30.4%	17.5%	8.0%	15.3%	12.9%

Source: US Census Bureau, 2006-2010 and 2011-2015 American Community Surveys



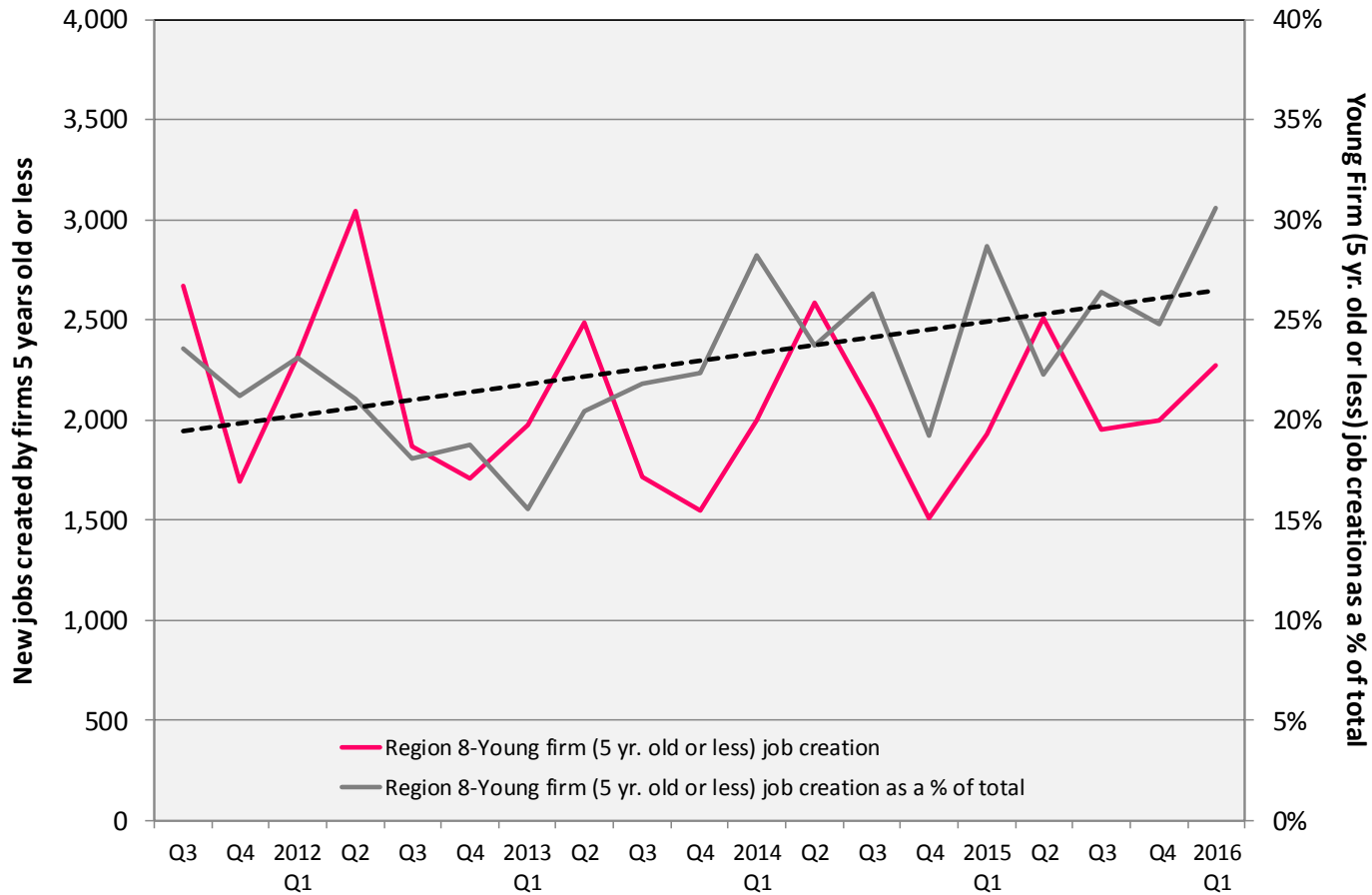
VIRGINIA INITIATIVE FOR
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IN EACH REGION

Firm Growth



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 OPPORTUNITY**
 IN EACH REGION

Jobs Created by Young Companies (5 years old or less)



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, Quarterly Workforce Indicators



VIRGINIA INITIATIVE FOR
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 IN EACH REGION

Jobs Created by Young Companies

(5 years old or less)

Region 8: Young firm (5 yrs old or less) job creation

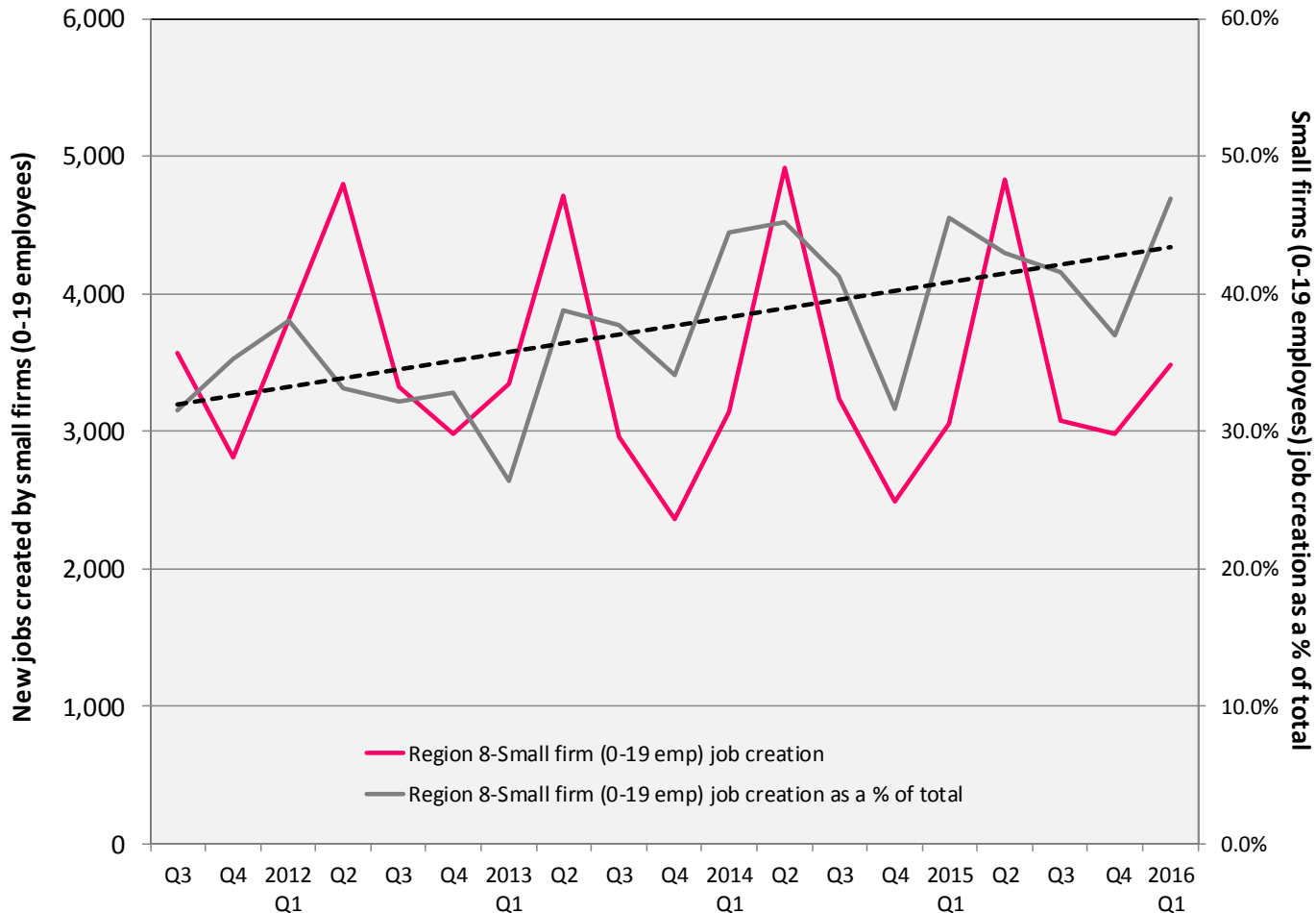
	2012 Average	2015 Average	2012 as a % of Total	2015 as a % of Total
US	1,542,135	1,674,953	25.2%	26.7%
Virginia	42,118	39,288	19.4%	26.2%
Region 8	2,232	2,096	20.3%	25.1%
Augusta	222	213	18.8%	23.9%
Bath	16	20	16.1%	19.2%
Clarke	74	39	34.4%	22.1%
Frederick	360	356	21.3%	29.1%
Highland	10	11	34.5%	41.0%
Page	67	77	17.3%	25.0%
Rockbridge	72	79	22.0%	26.0%
Rockingham	224	215	18.3%	18.3%
Shenandoah	247	114	37.0%	21.8%
Warren	171	148	22.4%	27.8%
Buena Vista city	12	14	9.9%	15.3%
Harrisonburg city	284	318	20.4%	29.2%
Lexington city	29	30	10.5%	19.7%
Staunton city	115	114	17.5%	24.8%
Waynesboro city	131	128	24.7%	33.4%
Winchester city	202	221	14.0%	24.0%

Source: US Census Bureau, LEHD, QWI



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

Jobs Created by Small Companies (less than 20 employees)



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, Quarterly Workforce Indicators



Jobs Created by Small Companies

(less than 20 employees)

Region 8: Small firm (0-19 Emp.) job creation

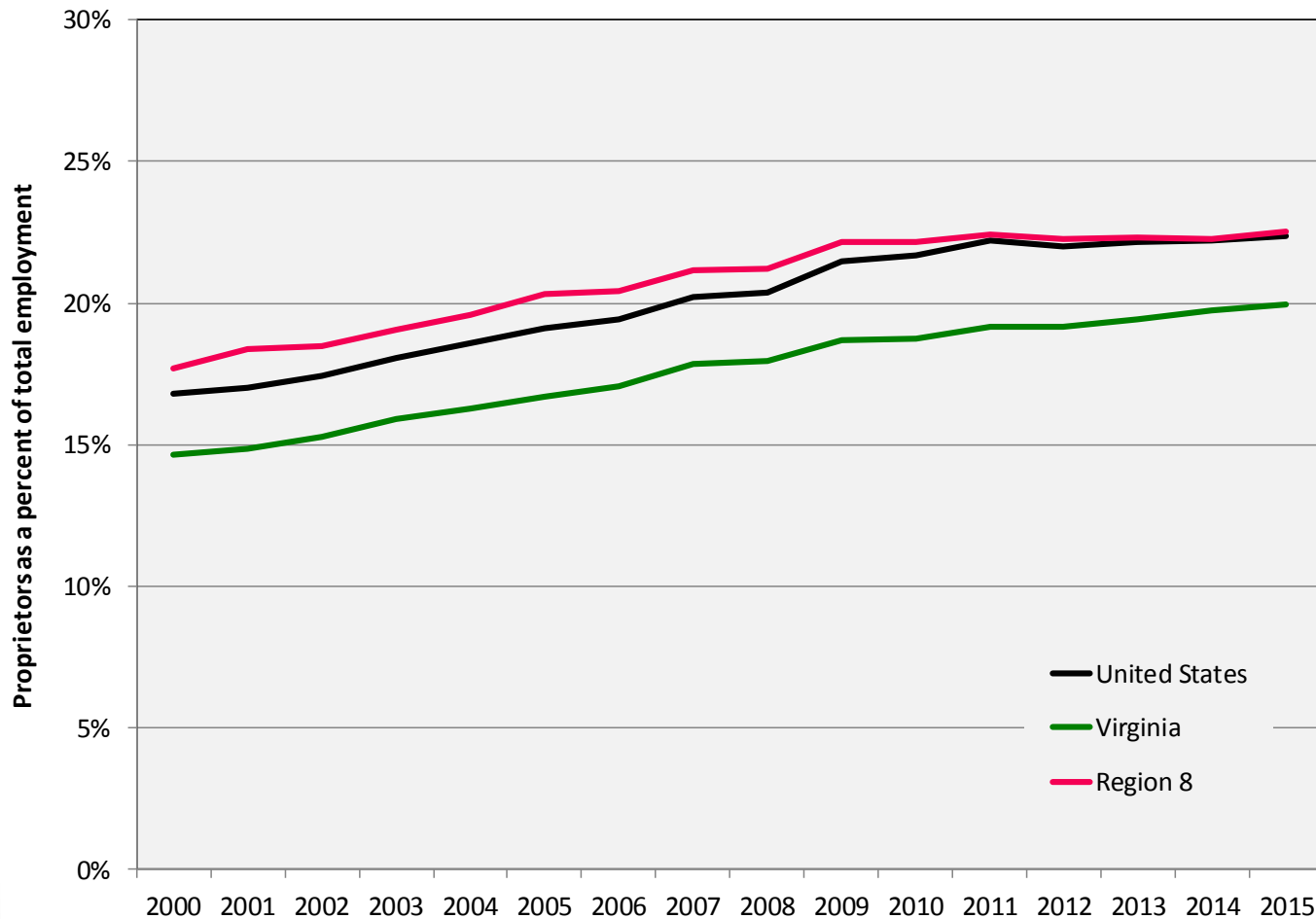
	2012 Average	2015 Average	2012 as a % of Total	2015 as a % of Total
US	2,203,129	2,268,500	36.0%	36.2%
Virginia	58,797	54,683	27.1%	36.4%
Region 8	3,731	3,485	34.0%	41.7%
Augusta	425	431	36.0%	48.4%
Bath	31	37	32.5%	35.3%
Clarke	130	105	60.6%	60.0%
Frederick	562	480	33.3%	39.2%
Highland	27	22	93.1%	83.8%
Page	140	149	36.2%	48.3%
Rockbridge	155	111	47.7%	36.7%
Rockingham	445	485	36.3%	41.5%
Shenandoah	273	270	40.9%	51.6%
Warren	301	246	39.5%	46.3%
Buena Vista city	24	29	20.3%	32.5%
Harrisonburg city	408	378	29.2%	34.7%
Lexington city	77	65	27.8%	43.1%
Staunton city	232	182	35.5%	39.6%
Waynesboro city	172	163	32.4%	42.3%
Winchester city	330	331	22.9%	36.0%

Source: US Census Bureau, LEHD, QWI



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Sole Proprietorships



Source: US Bureau of Economic Analysis



Sole Proprietorships as a percent of total employment

Proprietors as a percent of total employment: Region 8

	2000 Proprietors	2010 Proprietors	2015 Proprietors	Annual Growth (00-10)	Annual Growth (10-15)	Proprietors as a % of total employment
United States	27,760,800	37,508,700	42,561,400	3.1%	2.1%	22.4%
Virginia	644,573	890,602	1,008,978	3.3%	2.1%	19.9%
Region 8	46,256	61,620	66,503	2.9%	1.3%	22.5%
Augusta, Staunton + Waynesboro, VA*	11,341	12,993	13,901	1.4%	1.1%	21.6%
Bath	545	634	673	1.5%	1.0%	21.3%
Clarke	1,840	2,847	3,062	4.5%	1.2%	42.4%
Frederick + Winchester, VA*	8,652	12,330	13,849	3.6%	2.0%	19.5%
Highland	710	699	725	-0.2%	0.6%	54.9%
Page	2,409	2,630	2,751	0.9%	0.8%	31.3%
Rockbridge, Buena Vista + Lexington, VA*	3,226	4,532	4,772	3.5%	0.9%	24.9%
Rockingham + Harrisonburg, VA*	10,168	15,070	16,574	4.0%	1.6%	20.1%
Shenandoah	4,402	5,642	5,926	2.5%	0.8%	28.3%
Warren	2,963	4,243	4,270	3.7%	0.1%	24.7%

Source: US Bureau of Economic Analysis



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Thank You

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