



Target Industry Cluster Analysis

**Indiana 15 Regional Planning Commission,
Indiana**



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01 overview

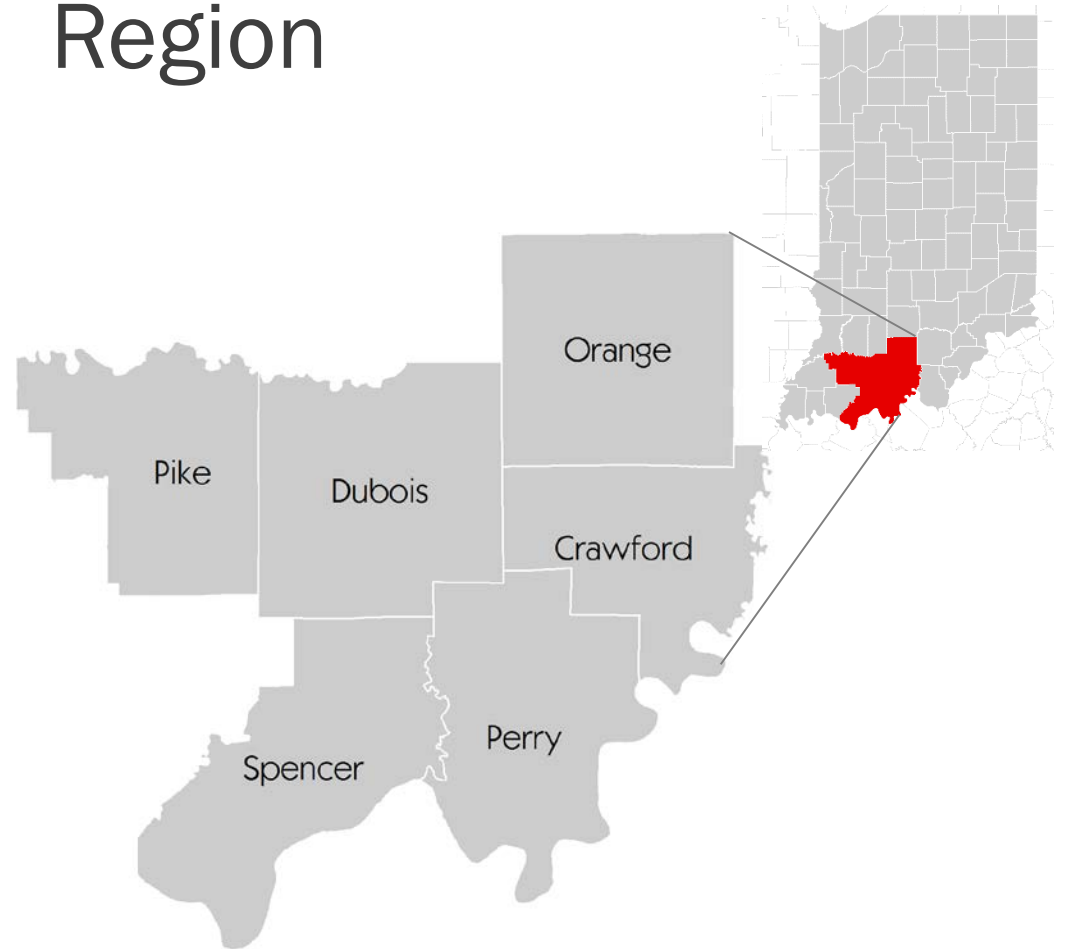
**Indiana 15 Regional Planning
Commission Region, IN**

Overview

Indiana 15 Regional Planning Commission Region

The Indiana 15 Regional Planning Commission Region is comprised of six Indiana counties. I-64 passes through the central part of the region connecting to I-55 to the west and I-65 to the east.

- Crawford
- Dubois
- Orange
- Perry
- Pike
- Spencer



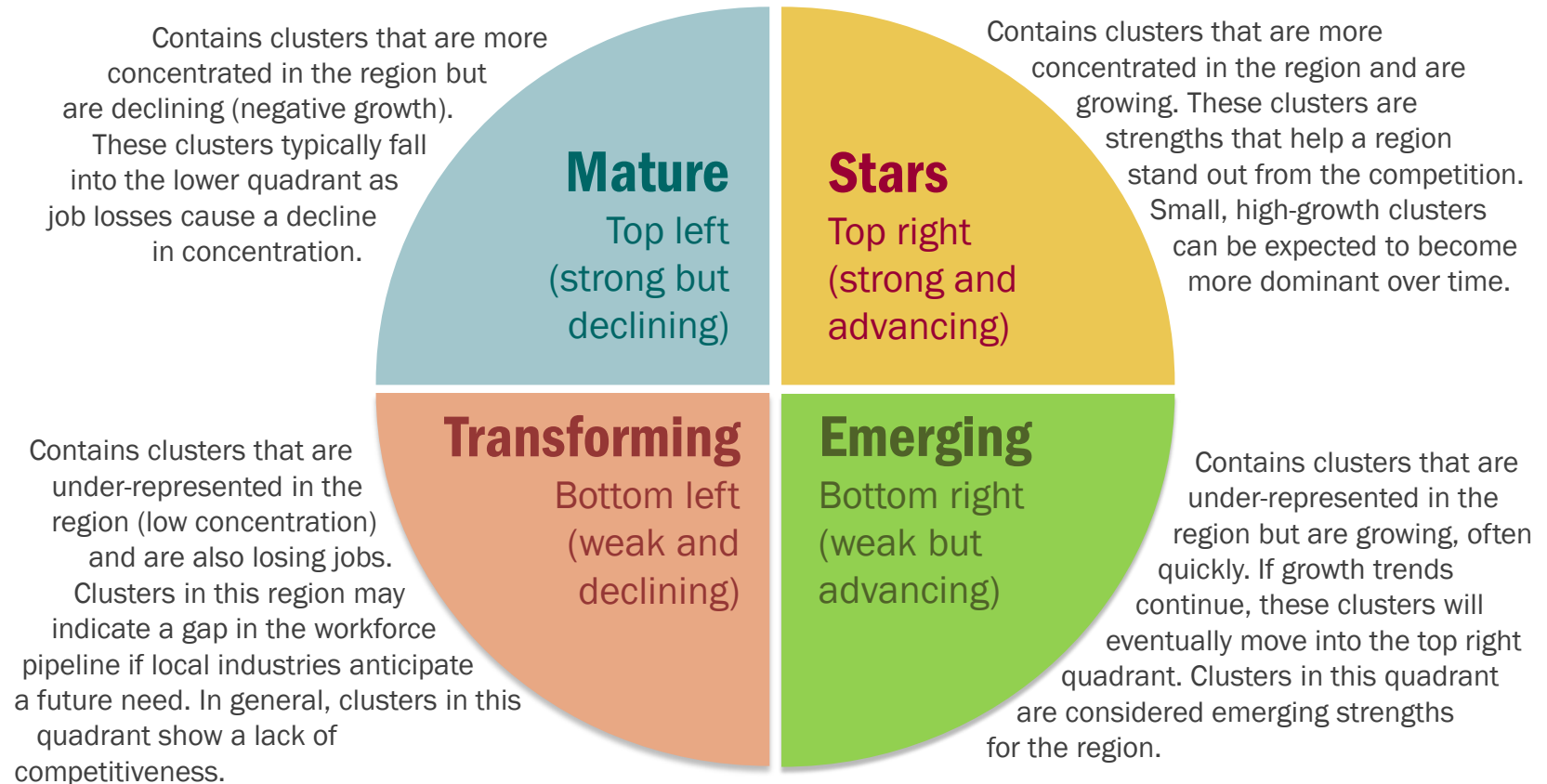
02 industry cluster analysis

**Indiana 15 Regional Planning
Commission Region, IN**

Industry cluster analysis

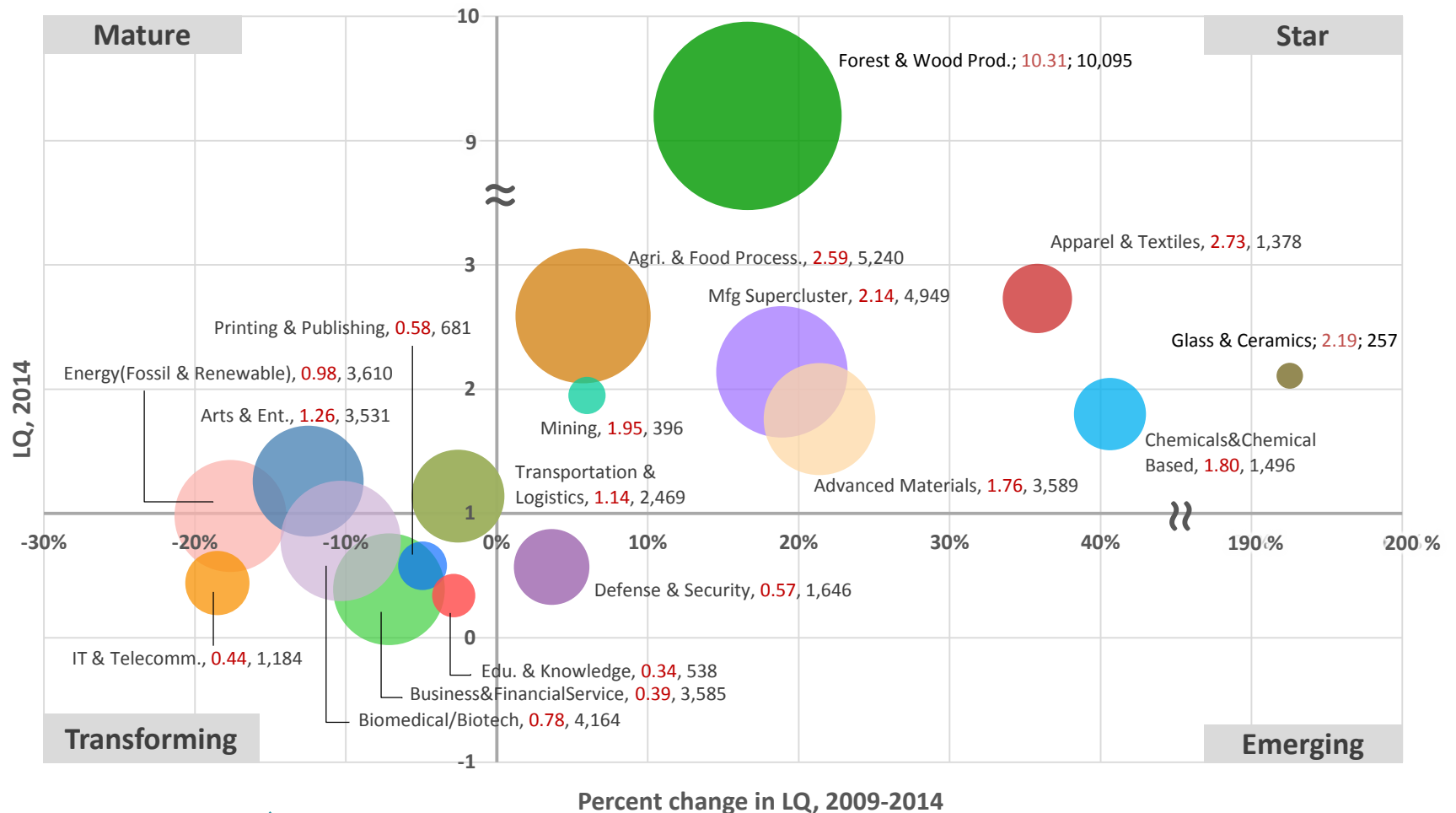
How to interpret cluster data results

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



Industry and occupation

Industry cluster bubble chart

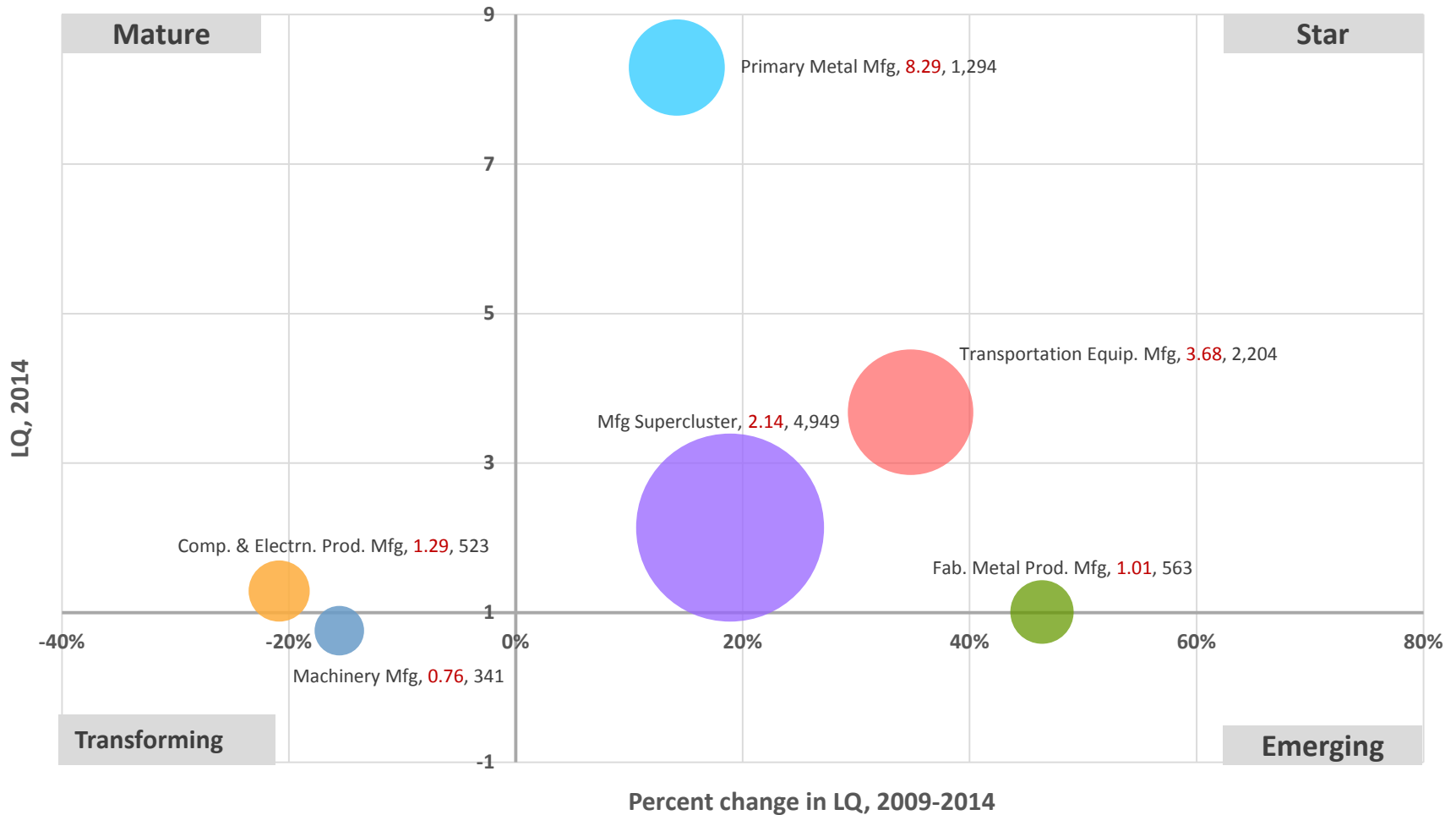


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Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).
 Note: Label includes cluster name, LQ 2014, and Employment 2014; NAICS 2012 definitions

Industry and occupation

Manufacturing sub-cluster bubble chart

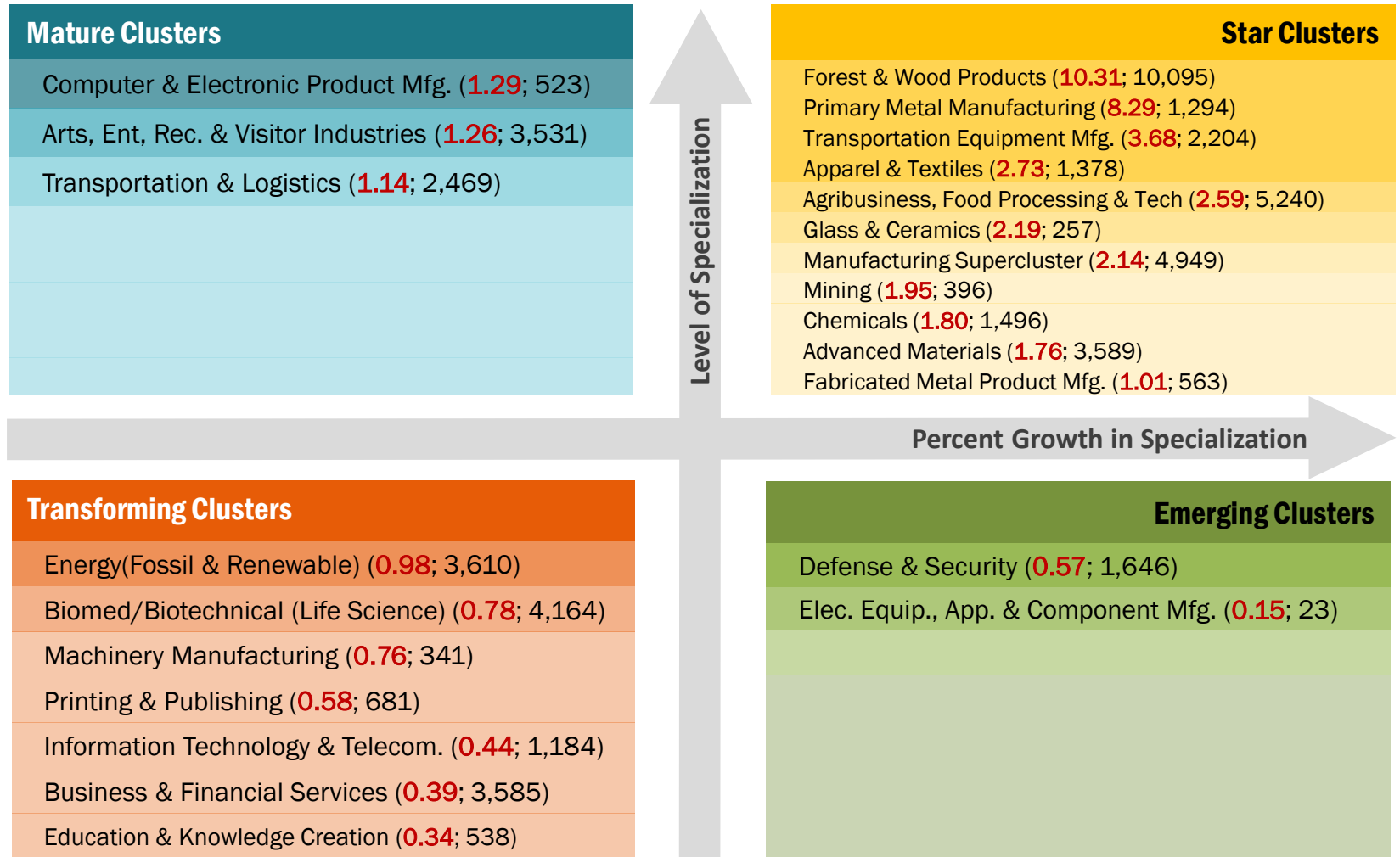


Note: Elec. Equip., App. & Comp. Mfg. has too few jobs.

section 02

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors).
Note: Label includes cluster name, LQ 2014, and Employment 2014; NAICS 2012 definition

Industry cluster analysis



Note: Elec. Equip., App. & Comp. Mfg. has too few jobs.

section 02

NOTE: The first number after each cluster represents its location quotient while the second number 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.

Industry and occupation

Bubble chart interpretation

Mature Industries

Three industry clusters in the Indiana 15 Regional Planning Commission (RPC) Region are in the Maturing stage: Computer & Electronic Product Mfg.; Arts, Entertainment, Recreation & Visitor Industries; and Transportation & Logistics. These industries are relatively concentrated, but their growth is trending downward. It is worth noting, however, that the Indiana 15 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 Indiana 15 RPC Region, Energy, Biomed/Biotechnical (Life Science), Machinery Mfg., Printing & Publishing, Information Technology & Telecom., Business & Financial Services, Education & Knowledge Creation, 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. The most highly concentrated of the Star industry clusters in the Indiana 15 RPC Region is Forest & Wood Products . Its location quotient is 10.31, indicating that the cluster is 10 times more concentrated in the region compared to the U.S. The other strong clusters in the region are Primary Metal Manufacturing, Transportation Equipment Manufacturing, Apparel & Textiles, Agribusiness, Food Processing & Technology, Glass & Ceramics.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are two Emerging clusters in the Indiana 15 RPC Region: Defense & Security and Electric Equipment, Appliances & Component Manufacturing.

03 target industry cluster

Manufacturing Supercluster

**Arts, Entertainment,
Recreation And Visitor
Industries**

Energy

**Information Technology And
Telecommunications**

Shift-Share Analysis by Top Industry Sectors: 15 Regional Planning Commission, IN

Manufacturing Supercluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Motor Vehicle Transmission and Power Train Parts Manufacturing	1,160	59	245	304	82
Iron Foundries	930	53	3	56	↑ 172
Motor Vehicle Brake System Manufacturing	617	35	-31	4	↑ 151
Printed Circuit Assembly (Electronic Assembly) Manufacturing	523	55	3	58	-259
Ship Building and Repairing	389	15	-8	7	↑ 181
Rolled Steel Shape Manufacturing	304	22	2	24	-17
Electroplating, Plating, Polishing, Anodizing, and Coloring	195	0	0	0	↑ 195
Sawmill, Woodworking, and Paper Machinery Manufacturing	123	13	-7	6	-62
Machine Shops	121	7	13	20	14
All Other Miscellaneous General Purpose Machinery Manufacturing	84	4	4	8	↑ 20
All Other Miscellaneous Fabricated Metal Product Manufacturing	82	3	1	4	↑ 41
Cutting Tool and Machine Tool Accessory Manufacturing	66	5	14	19	-23
Aluminum Foundries (except Die-Casting)	58	4	2	6	4
Plate Work Manufacturing	48	5	2	7	-24
Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers	48	4	4	8	-5

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

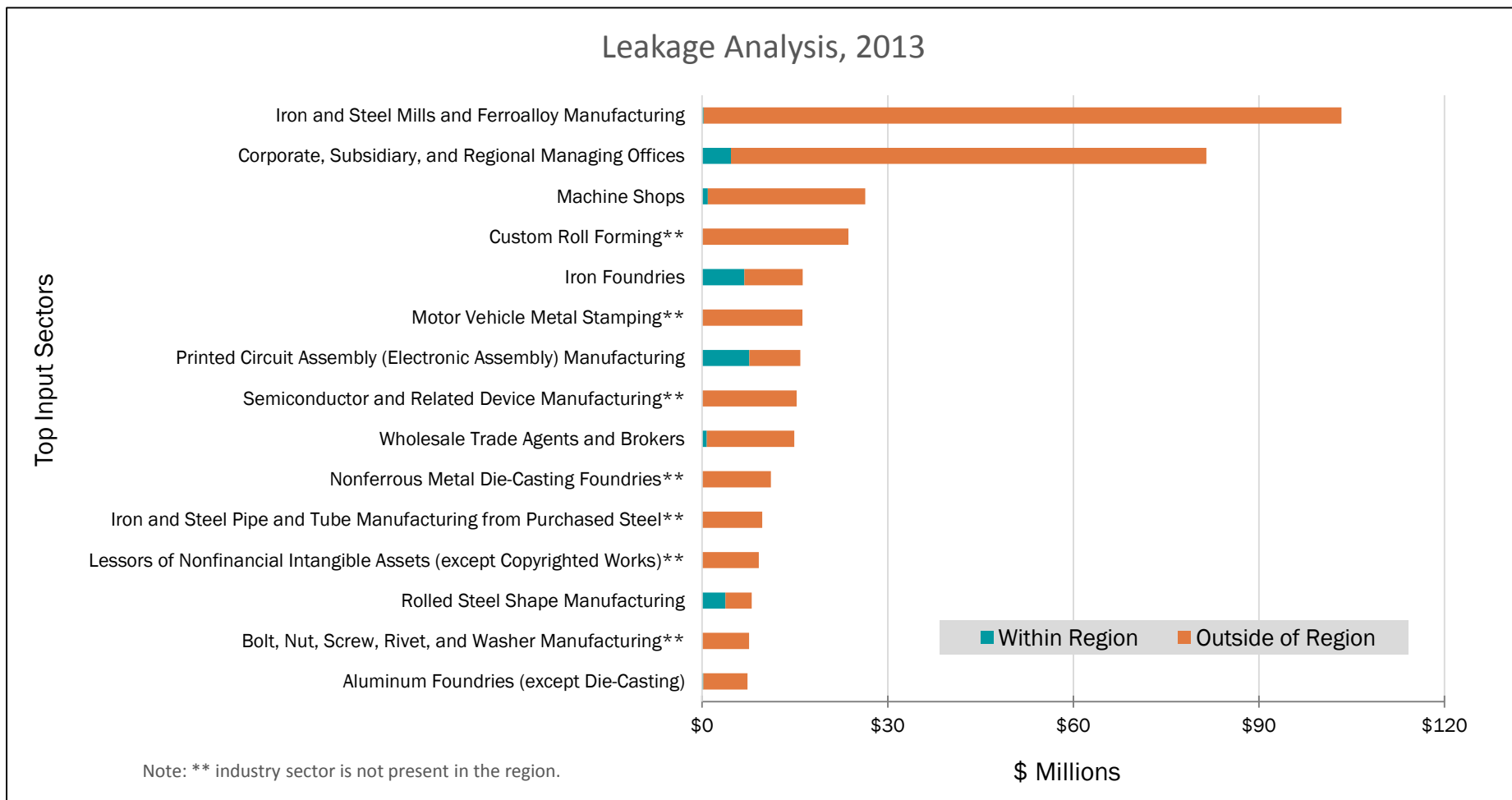
Manufacturing Supercluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Iron and Steel Mills and Ferroalloy Manufacturing *	\$103.35	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$81.51	6%	94%
Machine Shops	\$26.35	3%	97%
Custom Roll Forming **	\$23.63	0%	100%
Iron Foundries	\$16.25	42%	58%
Motor Vehicle Metal Stamping **	\$16.22	0%	100%
Printed Circuit Assembly (Electronic Assembly) Manufacturing	\$15.89	48%	52%
Semiconductor and Related Device Manufacturing **	\$15.28	0%	100%
Wholesale Trade Agents and Brokers	\$14.88	5%	95%
Nonferrous Metal Die-Casting Foundries **	\$11.11	0%	100%
Iron and Steel Pipe and Tube Manufacturing from Purchased Steel **	\$9.72	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$9.15	0%	100%
Rolled Steel Shape Manufacturing	\$7.99	47%	53%
Bolt, Nut, Screw, Rivet, and Washer Manufacturing **	\$7.60	0%	100%
Aluminum Foundries (except Die-Casting)	\$7.35	3%	97%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Manufacturing Supercluster



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Top Occupations: 15 Regional Planning Commission, IN

Manufacturing Supercluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Team Assemblers	534	37%	\$10.7	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	243	19%	\$15.3	High school diploma or equivalent
First-Line Supervisors of Production and Operating Workers	190	30%	\$23.3	Postsecondary non-degree award
Machinists	178	32%	\$16.9	High school diploma or equivalent
Computer-Controlled Machine Tool Operators, Metal and Plastic	177	42%	\$14.8	High school diploma or equivalent
Inspectors, Testers, Sorters, Samplers, and Weighers	169	27%	\$14.7	High school diploma or equivalent
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	119	25%	\$15.3	High school diploma or equivalent
Electrical and Electronics Engineering Technicians	116	-17%	\$31.7	Associate's degree
Industrial Machinery Mechanics	114	37%	\$19.3	High school diploma or equivalent
Grinding and Polishing Workers, Hand	109	43%	\$10.7	Less than high school
Tool and Die Makers	104	33%	\$21.3	High school diploma or equivalent
Mechanical Engineers	104	22%	\$33.3	Bachelor's degree
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	97	17%	\$12.7	High school diploma or equivalent
Foundry Mold and Coremakers	93	31%	\$12.0	High school diploma or equivalent
Industrial Engineers	90	15%	\$27.1	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Shift-Share Analysis by Top Industry Sectors: 15 Regional Planning Commission, IN

Arts, Entertainment, Recreation And Visitor Industries

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance , 2009-2014
Casino Hotels	1,160	105	-87	18	-248
Amusement and Theme Parks	716	56	57	113	-14
Hotels (except Casino Hotels) and Motels	423	37	1	38	-98
Independent Artists, Writers, and Performers	193	11	5	16	↑ 32
Skiing Facilities	147	10	10	20	-8
Golf Courses and Country Clubs	116	12	-5	7	-51
Sports Teams and Clubs	112	3	12	15	↑ 53
Fitness and Recreational Sports Centers	100	9	4	13	-27
RV (Recreational Vehicle) Parks and Campgrounds	81	10	11	21	-66
Theater Companies and Dinner Theaters	62	3	3	6	↑ 22
Radio Stations	48	3	-2	1	↑ 10
All Other Amusement and Recreation Industries	41	2	5	7	4
Other Spectator Sports	38	3	2	5	-5
Nature Parks and Other Similar Institutions	38	2	0	2	↑ 13
All Other Traveler Accommodation	32	1	2	3	↑ 21

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Arts, Entertainment, Recreation And Visitor Industries

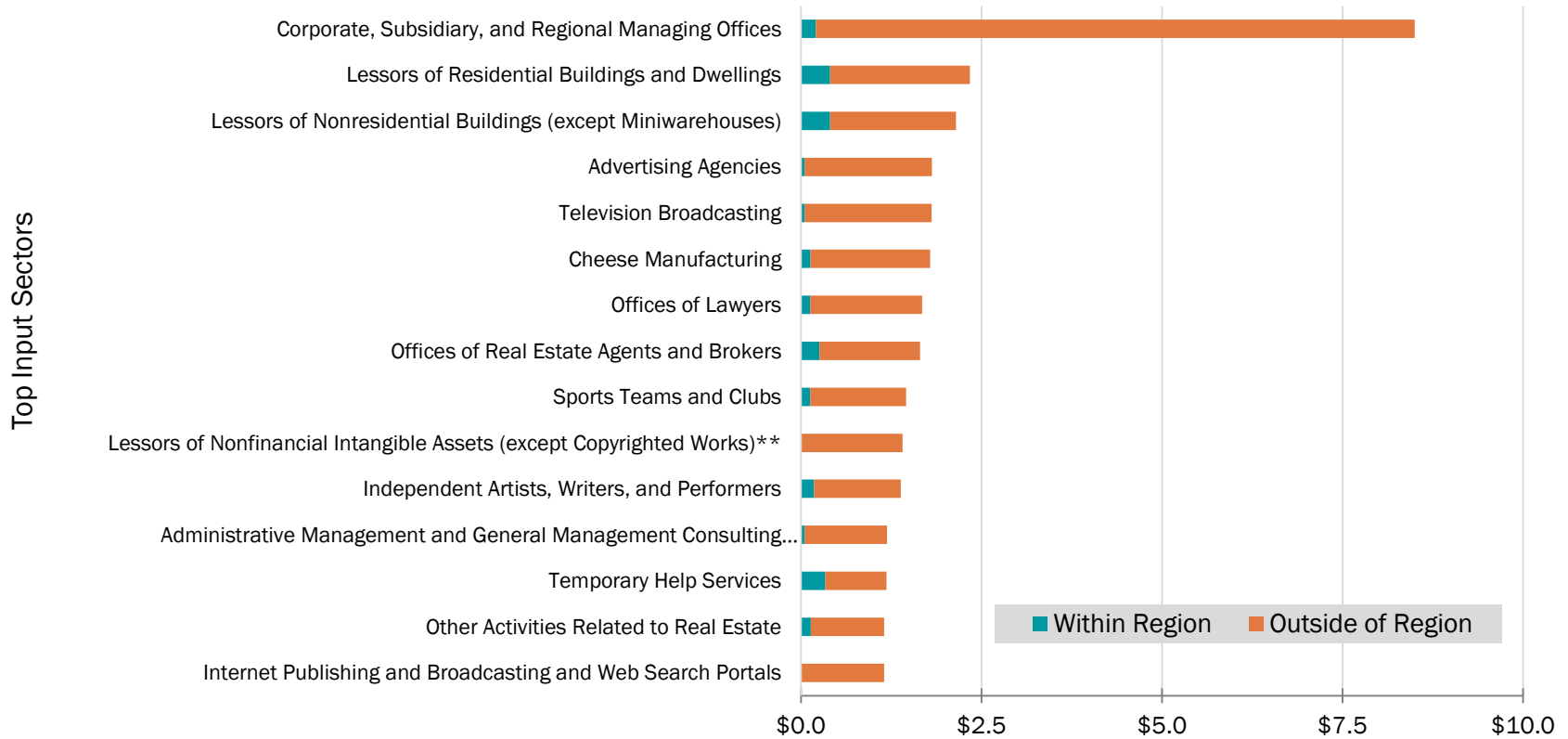
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$8.50	2%	98%
Lessors of Residential Buildings and Dwellings	\$2.34	17%	83%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$2.15	19%	81%
Advertising Agencies	\$1.81	3%	97%
Television Broadcasting *	\$1.81	3%	97%
Cheese Manufacturing	\$1.79	7%	93%
Offices of Lawyers	\$1.68	7%	93%
Offices of Real Estate Agents and Brokers	\$1.65	15%	85%
Sports Teams and Clubs	\$1.46	9%	91%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$1.40	0%	100%
Independent Artists, Writers, and Performers	\$1.38	13%	87%
Administrative Management and General Management Consulting Services	\$1.19	4%	96%
Temporary Help Services	\$1.18	28%	72%
Other Activities Related to Real Estate	\$1.15	12%	88%
Internet Publishing and Broadcasting and Web Search Portals	\$1.15	0%	100%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Arts, Entertainment, Recreation And Visitor Industries

Leakage Analysis, 2013



Note: ** industry sector is not present in the region.

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Top Occupations: 15 Regional Planning Commission, IN

Arts, Entertainment, Recreation And Visitor Industries

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Amusement and Recreation Attendants	309	-4%	\$8.4	Less than high school
Maids and Housekeeping Cleaners	254	-14%	\$7.9	Less than high school
Waiters and Waitresses	161	-13%	\$8.8	Less than high school
Hotel, Motel, and Resort Desk Clerks	142	-15%	\$8.8	High school diploma or equivalent
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	138	-10%	\$9.6	Less than high school
Gaming Dealers	117	-12%	\$8.4	High school diploma or equivalent
Cooks, Restaurant	97	-13%	\$8.9	Less than high school
Cashiers	90	-11%	\$8.6	Less than high school
Maintenance and Repair Workers, General	87	-12%	\$16.6	High school diploma or equivalent
Bartenders	74	-13%	\$9.3	Less than high school
Musicians and Singers	69	33%	\$15.1	High school diploma or equivalent
Ushers, Lobby Attendants, and Ticket Takers	61	5%	\$9.4	Less than high school
Recreation Workers	56	17%	\$10.3	Bachelor's degree
Security Guards	52	-7%	\$9.9	High school diploma or equivalent
Landscaping and Groundskeeping Workers	52	-12%	\$10.2	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

Shift-Share Analysis by Top Industry Sectors: 15 Regional Planning Commission, IN

Energy (Fossil And Renewable)

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Fossil Fuel Electric Power Generation	564	50	-238	-188	↑ 95
Gasoline Stations with Convenience Stores	392	30	-13	17	-22
Bituminous Coal Underground Mining	360	33	-35	-2	-72
Crude Petroleum and Natural Gas Extraction	328	19	18	37	↑ 39
Plumbing, Heating, and Air-Conditioning Contractors	316	25	-9	16	-35
Water and Sewer Line and Related Structures Construction	312	37	-59	-22	-151
Electrical Contractors and Other Wiring Installation Contractors	238	22	-17	5	-62
Power and Communication Line and Related Structures Construction	167	16	29	45	-83
Other Heavy and Civil Engineering Construction	122	11	-19	-8	-20
Bituminous Coal and Lignite Surface Mining	122	15	-29	-14	-58
Electric Power Distribution	102	7	32	39	-31
Fuel Dealers	91	3	-5	-2	↑ 49
Other Gasoline Stations	72	4	-3	1	↑ 12
Petroleum Bulk Stations and Terminals	69	6	-5	1	-5
Engineering Services	66	10	-3	7	-71

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Energy (Fossil And Renewable)

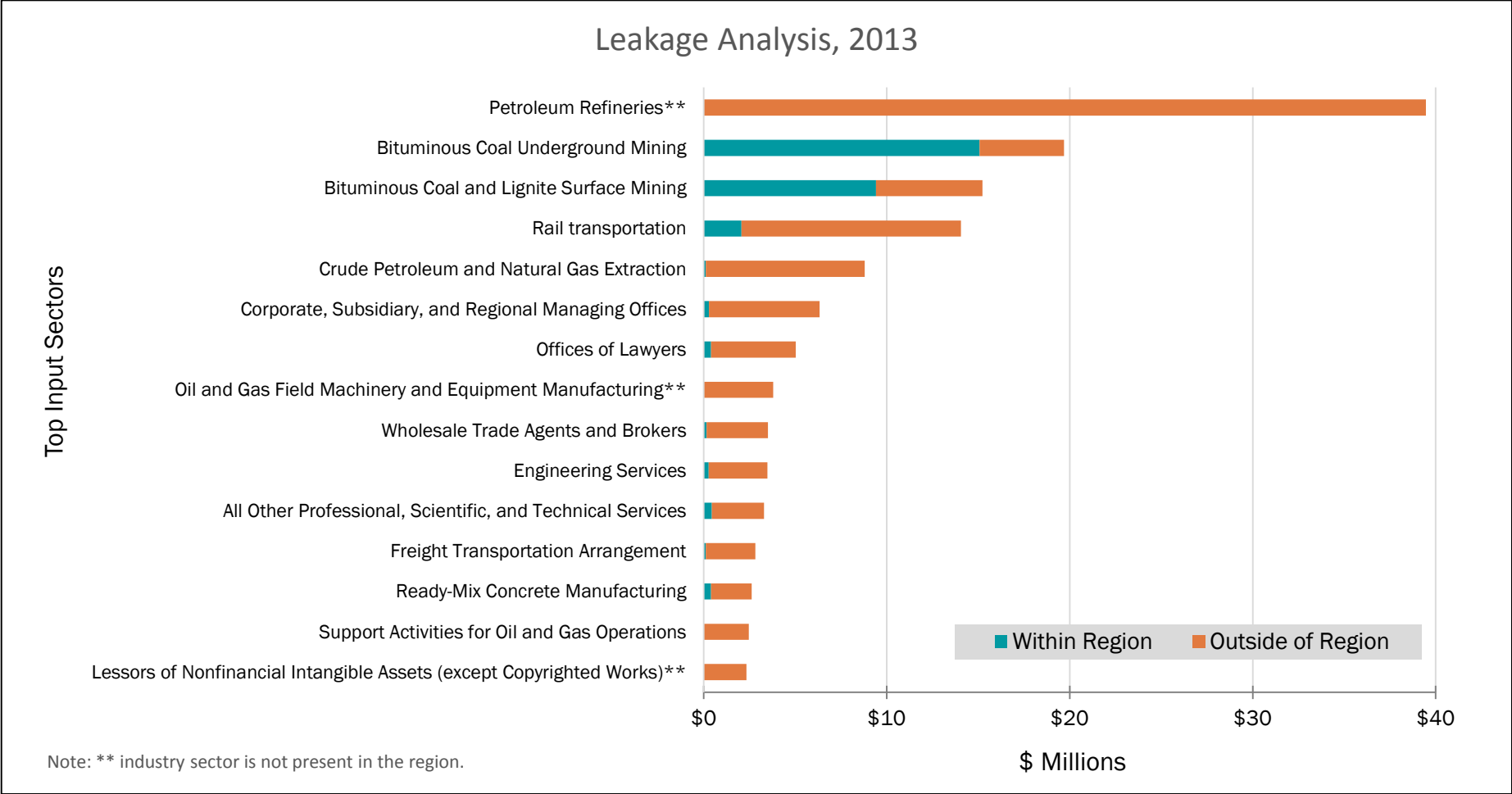
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Petroleum Refineries **	\$39.46	0%	100%
Bituminous Coal Underground Mining	\$19.69	77%	23%
Bituminous Coal and Lignite Surface Mining	\$15.24	62%	38%
Rail transportation	\$14.06	15%	85%
Crude Petroleum and Natural Gas Extraction	\$8.80	1%	99%
Corporate, Subsidiary, and Regional Managing Offices	\$6.34	5%	95%
Offices of Lawyers	\$5.03	8%	92%
Oil and Gas Field Machinery and Equipment Manufacturing **	\$3.80	0%	100%
Wholesale Trade Agents and Brokers	\$3.51	4%	96%
Engineering Services	\$3.49	8%	92%
All Other Professional, Scientific, and Technical Services	\$3.29	13%	87%
Freight Transportation Arrangement	\$2.82	4%	96%
Ready-Mix Concrete Manufacturing	\$2.63	15%	85%
Support Activities for Oil and Gas Operations *	\$2.47	1%	99%
Lessors of Nonfinancial Intangible Assets (except copyrighted works)**	\$2.33	0%	100%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Energy (Fossil And Renewable)



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Top Occupations: 15 Regional Planning Commission, IN

Energy (Fossil And Renewable)

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Cashiers	255	2%	\$8.6	Less than high school
Construction Laborers	145	-26%	\$14.1	Less than high school
Electricians	130	-19%	\$20.7	High school diploma or equivalent
Operating Engineers and Other Construction Equipment Operators	125	-23%	\$20.2	High school diploma or equivalent
First-Line Supervisors of Construction Trades and Extraction Workers	120	-12%	\$21.5	High school diploma or equivalent
Plumbers, Pipefitters, and Steamfitters	91	-13%	\$21.4	High school diploma or equivalent
Electrical Power-Line Installers and Repairers	90	-10%	\$34.0	High school diploma or equivalent
Power Plant Operators	82	-13%	\$40.4	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	77	-5%	\$17.5	Postsecondary non-degree award
Automotive and Watercraft Service Attendants	69	5%	\$9.1	Less than high school
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	69	1%	\$16.0	Postsecondary non-degree award
Electrical and Electronics Engineering Technicians	66	-14%	\$31.7	Associate's degree
First-Line Supervisors of Retail Sales Workers	64	0%	\$13.1	High school diploma or equivalent
Managers, All Other	62	15%	\$15.8	High school diploma or equivalent
General and Operations Managers	59	-21%	\$33.8	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Shift-Share Analysis by Top Industry Sectors: 15 Regional Planning Commission, IN

Information Technology And Telecommunications

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Printed Circuit Assembly (Electronic Assembly) Manufacturing	523	55	3	58	-259
Electrical Contractors and Other Wiring Installation Contractors	238	22	-17	5	-62
Wired Telecommunications Carriers	193	13	-15	-2	↑ 17
Computer Systems Design Services	100	7	10	17	-5
Custom Computer Programming Services	44	3	6	9	-11
Software Publishers	26	0	1	1	↑ 18
Motor and Generator Manufacturing	23	0	0	0	↑ 20
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	11	1	-1	0	-7

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient job numbers (< 10 jobs) for Data Processing, Hosting, and Related Services; Satellite Telecommunications; Software and Other Pre-recorded Compact Disc, Tape, and Record Reproducing; Other Electronic Parts and Equipment Merchant Wholesalers; Telecommunications Resellers; ; and R&D in the Physical, Engineering, and Life Sciences (except Biotechnology), etc.

section 03

Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Information Technology And Telecommunications

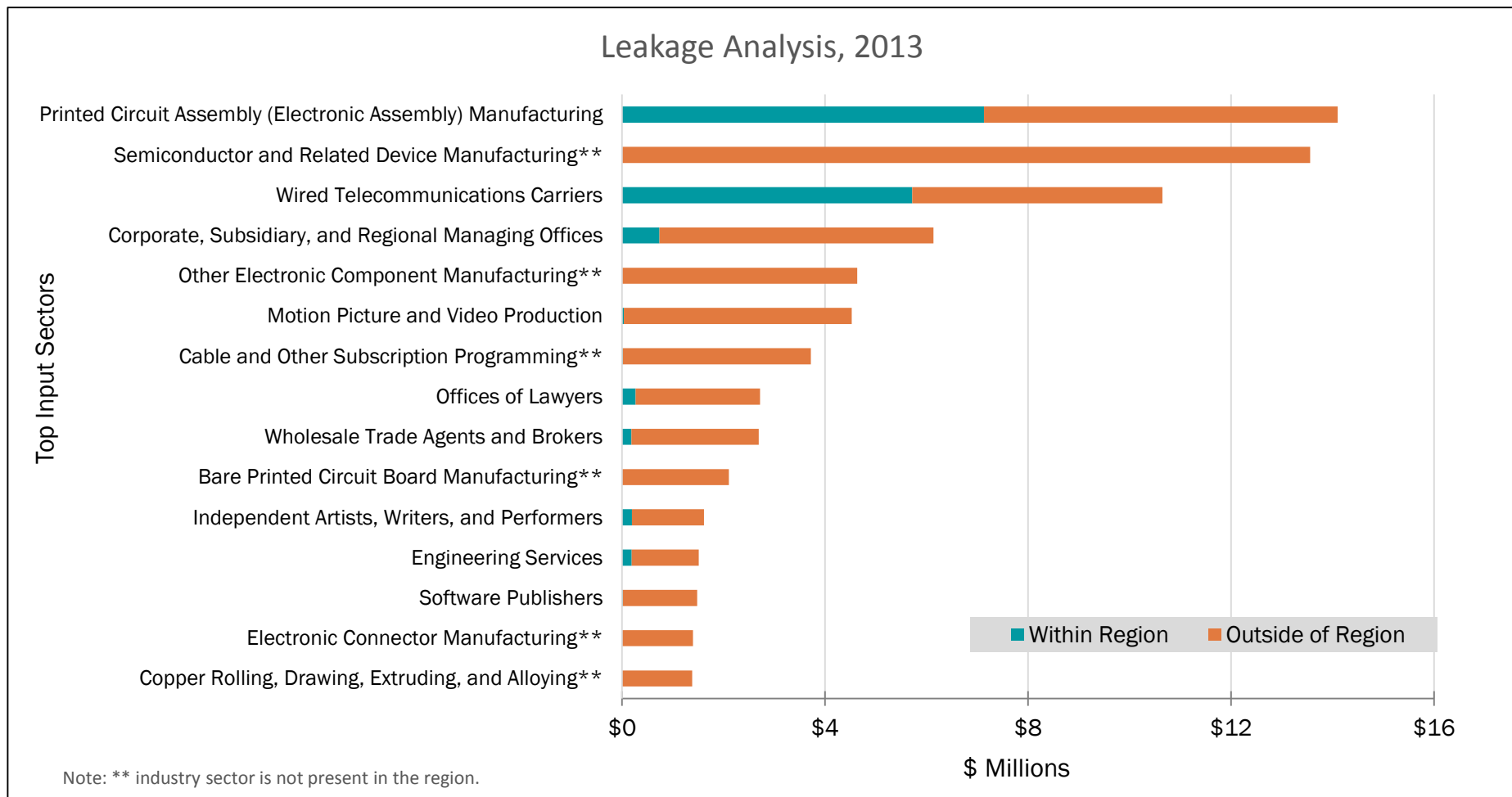
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Printed Circuit Assembly (Electronic Assembly) Manufacturing	\$14.10	51%	49%
Semiconductor and Related Device Manufacturing **	\$13.56	0%	100%
Wired Telecommunications Carriers	\$10.64	54%	46%
Corporate, Subsidiary, and Regional Managing Offices	\$6.13	12%	88%
Other Electronic Component Manufacturing **	\$4.63	0%	100%
Motion Picture and Video Production *	\$4.53	1%	99%
Cable and Other Subscription Programming **	\$3.72	0%	100%
Offices of Lawyers	\$2.72	10%	90%
Wholesale Trade Agents and Brokers	\$2.69	7%	93%
Bare Printed Circuit Board Manufacturing **	\$2.10	0%	100%
Independent Artists, Writers, and Performers	\$1.61	12%	88%
Engineering Services	\$1.51	13%	87%
Software Publishers	\$1.48	1%	99%
Electronic Connector Manufacturing **	\$1.39	0%	100%
Copper Rolling, Drawing, Extruding, and Alloying **	\$1.38	0%	100%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region.

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Top 15 Inputs by Dollars: 15 Regional Planning Commission, IN

Information Technology And Telecommunications



section 03

Top Occupations: 15 Regional Planning Commission, IN

Information Technology And Telecommunications

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, \$ 2014	Entry Level Education
Electrical and Electronics Engineering Technicians	95	-24%	\$31.7	Associate's degree
Electricians	95	-21%	\$20.7	High school diploma or equivalent
Electronics Engineers, Except Computer	91	-19%	\$40.0	Bachelor's degree
Unclassified Occupation	65	261%	\$13.0	N/A
Electrical and Electronic Equipment Assemblers	55	-26%	\$10.9	High school diploma or equivalent
Team Assemblers	29	-22%	\$10.7	High school diploma or equivalent
Telecommunications Equipment Installers and Repairers, Except Line Installers	28	-13%	\$26.4	Postsecondary non-degree award
Inspectors, Testers, Sorters, Samplers, and Weighers	23	-26%	\$14.7	High school diploma or equivalent
Telecommunications Line Installers and Repairers	20	-20%	\$20.0	High school diploma or equivalent
Industrial Engineers	19	-27%	\$27.1	Bachelor's degree
Computer Systems Analysts	19	12%	\$27.9	Bachelor's degree
Computer Programmers	18	6%	\$23.7	Bachelor's degree
Semiconductor Processors	18	-36%	\$15.5	Associate's degree
Construction Laborers	16	0%	\$14.1	Less than high school
Customer Service Representatives	16	-16%	\$13.6	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Report Contributors

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Center for Regional Development
Advancing Collaboration : Energizing Regions

The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

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