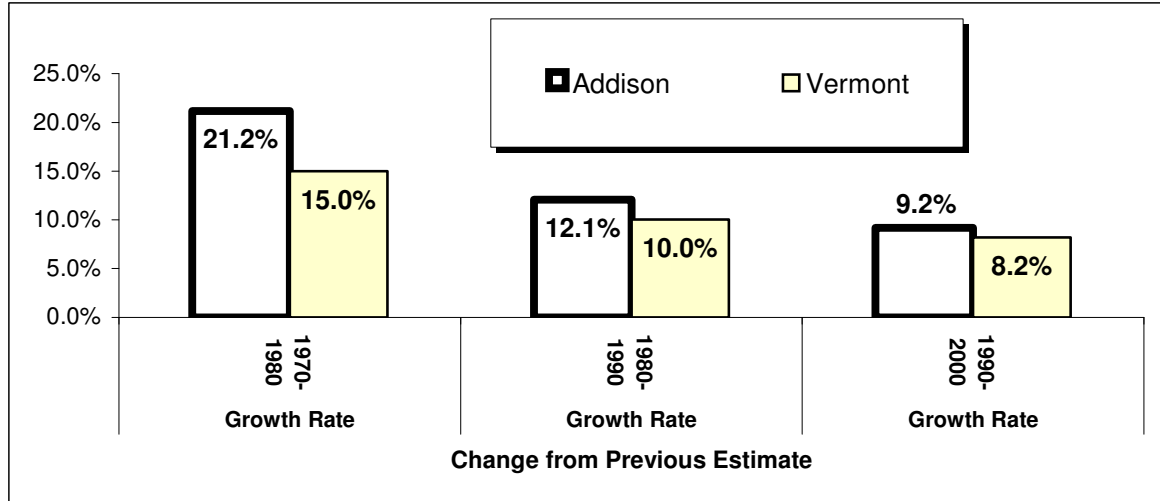


**Economic Analysis**

**Population**

Figure 1: Population Growth Rates 1990-2000



The population of Addison County has grown more quickly than that of the State of Vermont as a whole. Several factors can affect the population of an area. They include, but are not limited to: 1) employment activities or lack thereof; 2) favorable or unfavorable structure for business and industry operations; 3) cost of living; 4) quality of life; 5) pleasant climate or amenities that commonly attract permanent or seasonal retirement.

With the exception of the Northwestern tier of Vermont, consisting of Chittenden, Grand Isle, Franklin and Lamoille Counties, Addison County has been one of the fastest growing counties in the state.

**Figure 2: Population and Growth Rates for 1990-2000: Vermont and all Fourteen Counties**

Geographic area	Population		Population change, 1990 to 2000	
	2000	1990	Number	Percent
Vermont	608,827	562,758	46,069	8.2
<b>Addison County</b>	<b>35,974</b>	<b>32,953</b>	<b>3,021</b>	<b>9.2</b>
Bennington County	36,994	35,845	1,149	3.2
Caledonia County	29,702	27,846	1,856	6.7
Chittenden County	146,571	131,761	14,810	11.2
Essex County	6,459	6,405	54	0.8
Franklin County	45,417	39,980	5,437	13.6
Grand Isle County	6,901	5,318	1,583	29.8
Lamoille County	23,233	19,735	3,498	17.7
Orange County	28,226	26,149	2,077	7.9
Orleans County	26,277	24,053	2,224	9.2
Rutland County	63,400	62,142	1,258	2.0
Washington County	58,039	54,928	3,111	5.7
Windham County	44,216	41,588	2,628	6.3
Windsor County	57,418	54,055	3,363	6.2

Source: US Bureau of the Census, March 2001.

The components of population are births, deaths, International migration and domestic migration. Addison experienced an influx of population through domestic migration; approximately 9% of all domestic migration was to Addison County, less than its overall contribution to the total population of the state of 6%. Job creation in the northwestern tier of Vermont is considered a driving force behind this population growth, "Currently the economy of Northwestern Vermont is strong and the labor market is attracting new residents to the region. Birth rates are in decline and future population growth may be driven more by migration than natural increase"<sup>1</sup>

The well documented housing crunch in the greater Burlington area is also a contributing factor.

**Figure 3: Components of Population 1990-1999: Vermont and All Fourteen Counties**

<b>Geographic Area</b>	<b>Births 1990-99</b>	<b>Deaths 1990-99</b>	<b>Net Domestic Migration 1990-99</b>	<b>Net International Migration 1990-99</b>
Vermont	67,101	44,797	5,615	4,959
<b>Addison County</b>	<b>4,019</b>	<b>2,258</b>	<b>494</b>	<b>332</b>
Bennington County	3,891	3,854	161	52
Caledonia County	3,034	2,423	359	92
Chittenden County	16,968	7,569	196	3,031
Essex County	697	555	126	-8
Franklin County	6,020	3,143	1,575	127
Grand Isle County	684	401	721	56
Lamoille County	2,692	1,396	882	91
Orange County	2,988	2,002	769	51
Orleans County	2,817	2,308	972	66
Rutland County	6,761	5,731	-636	82
Washington County	6,142	4,621	-534	575
Windham County	4,788	3,573	-175	178
Windsor County	5,600	4,963	705	234

Source: US Bureau of the Census, 2000. Estimates (not Decennial Census)

The recent update to the Regional Plan examined data at the town level, "Although the 2000 population represents a new high for the region as a whole, more than half of the region's municipalities have still not exceeded their peak population from the 1800s".<sup>2</sup> In addition, the ACRPC reported on the fastest growing municipalities for the 1990-2000 period: Shoreham, Addison Ferrisburgh, New Haven and Monkton experienced the greatest growth measured in absolute numbers.

>>>>Insert map of Addison County.

<sup>1</sup> Addison County Regional Planning Commission. Regional Plan draft update. October 10, 2001.

<sup>2</sup> Ibid.

**Table 4: Projected Population Growth Rate Projections**

Geographic Area	Growth Rate 2000-2005	Growth Rate 2005-2010
UNITED STATES	4.5%	4.2%
NEW ENGLAND	1.7%	1.6%
VERMONT	3.1%	2.9%
BURLINGTON, VT	4.7%	4.4%
<b>ADDISON, VT</b>	<b>2.9%</b>	<b>2.8%</b>
BENNINGTON, VT	1.9%	1.9%
CALEDONIA, VT	2.4%	2.3%
CHITTENDEN, VT	4.5%	4.2%
ESSEX, VT	0.3%	0.3%
FRANKLIN, VT	5.2%	4.9%
GRAND ISLE, VT	4.9%	4.7%
LAMOILLE, VT	5.5%	5.1%
ORANGE, VT	4.8%	4.5%
ORLEANS, VT	2.4%	2.3%
RUTLAND, VT	0.8%	0.7%
WASHINGTON, VT	1.2%	1.2%
WINDHAM, VT	1.3%	1.2%
WINDSOR, VT	3.5%	3.3%

⇒ Woods and Poole Economics projects modest population growth for Addison County over the next ten years. Lamoille and Franklin Counties are projected to be the fastest growing counties. However, most of the growth would seem to be of the same type as Addison's population growth, namely in-migration of adult population. In fact, the school-age population is projected to decrease.

Source: Woods and Pool Economics, Inc.

Table 5: Highest to Lowest Median Age for Geographic Areas: 2000, 2005, 2010, 2020

2000	2005	2010	2020
ESSEX, VT	ESSEX, VT	ESSEX, VT	ESSEX, VT
WINDSOR, VT	WINDSOR, VT	BENNINGTON, VT	BENNINGTON, VT
BENNINGTON, VT	BENNINGTON, VT	WINDSOR, VT	WINDSOR, VT
RUTLAND, VT	ORLEANS, VT	ORLEANS, VT	ORLEANS, VT
ORLEANS, VT	RUTLAND, VT	RUTLAND, VT	RUTLAND, VT
WINDHAM, VT	WINDHAM, VT	WINDHAM, VT	CALEDONIA, VT
GRAND ISLE, VT	CALEDONIA, VT	CALEDONIA, VT	WINDHAM, VT
WASHINGTON, VT	WASHINGTON, VT	ORANGE, VT	ORANGE, VT
CALEDONIA, VT	ORANGE, VT	WASHINGTON, VT	WASHINGTON, VT
ORANGE, VT	GRAND ISLE, VT	VERMONT	VERMONT
VERMONT	VERMONT	GRAND ISLE, VT	<b>ADDISON, VT</b>
NEW ENGLAND	NEW ENGLAND	FRANKLIN, VT	FRANKLIN, VT
LAMOILLE, VT	LAMOILLE, VT	LAMOILLE, VT	LAMOILLE, VT
<b>ADDISON, VT</b>	<b>ADDISON, VT</b>	<b>ADDISON, VT</b>	BURLINGTON, VT
FRANKLIN, VT	FRANKLIN, VT	NEW ENGLAND	CHITTENDEN, VT
UNITED STATES	BURLINGTON, VT	BURLINGTON, VT	NEW ENGLAND
BURLINGTON, VT	UNITED STATES	CHITTENDEN, VT	UNITED STATES
CHITTENDEN, VT	CHITTENDEN, VT	UNITED STATES	GRAND ISLE, VT

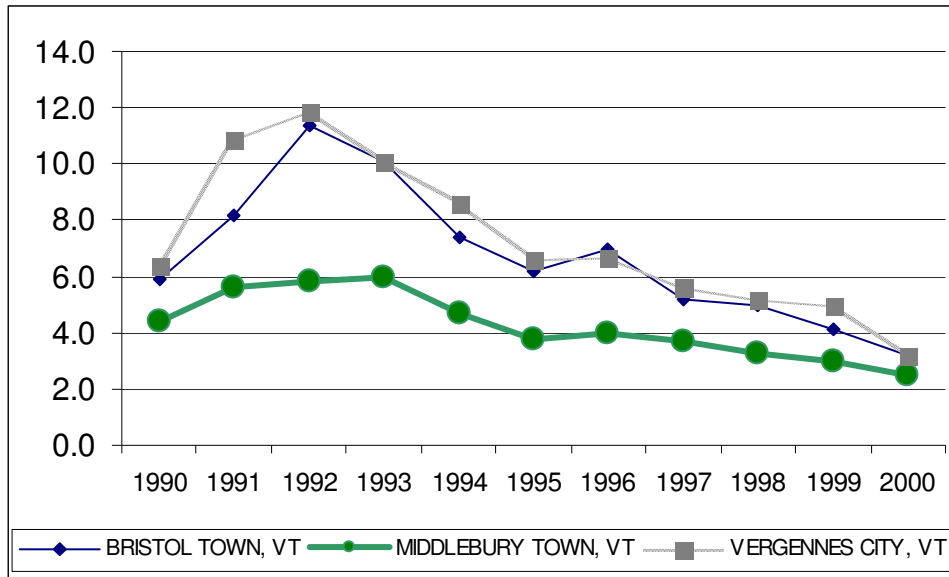
Source: Woods and Poole Economics

**Employment**

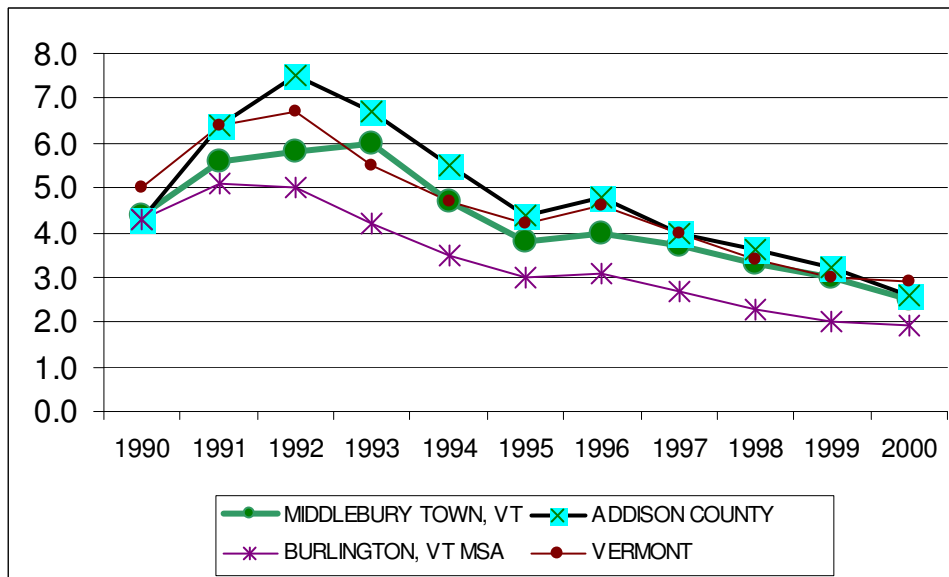
The unemployment rate is measure of those who are unemployed and actively seeking work. The unemployment rate is a traditional measure of economic success or distress; however, this indicator does not capture “underemployment”, those who are working several part-time jobs or at jobs that are not providing adequate or desired remuneration.

The early 1990s were a time of adjustment and recovery from a recession. Employment levels in Bristol and Vergennes were impacted to a greater degree by the recession than the town of Middlebury’s. Most likely, downsizing in manufacturing was a contributing factor to the higher unemployment rates.

Figure 6: Historical Average Annual Unemployment: Bristol, Middlebury and Vergennes



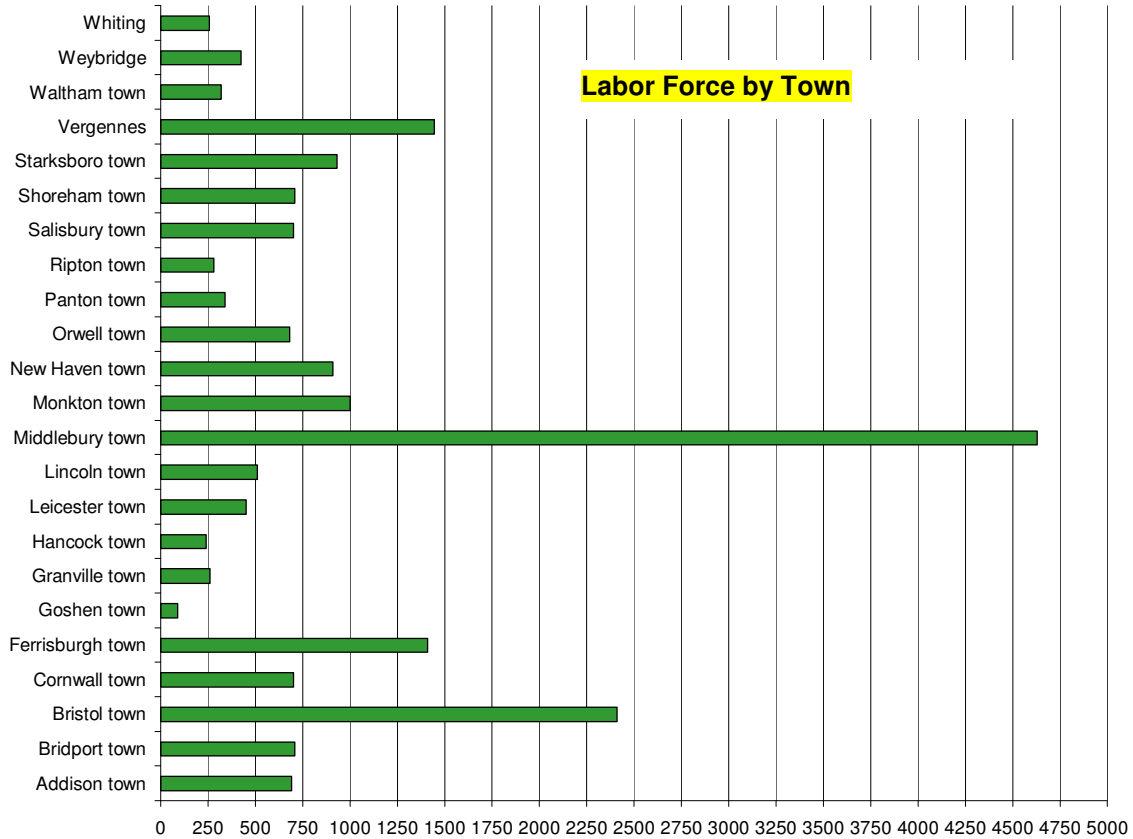
Source: US Bureau of Labor Statistics



Source: US Bureau of Labor Statistics

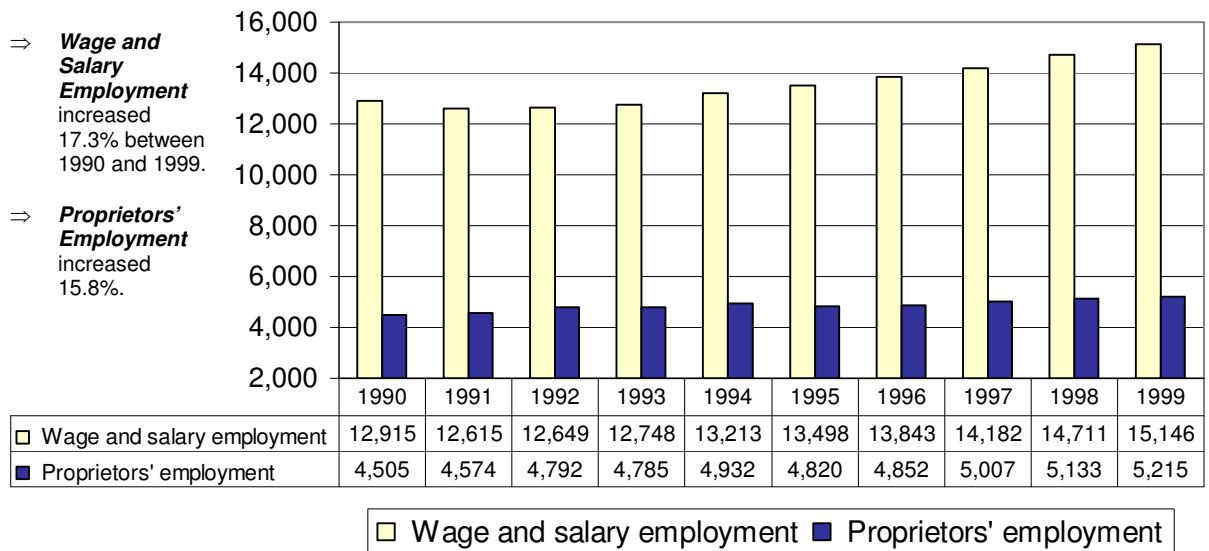
The difference in unemployment rates between the greater Burlington area and Addison County is less significant in the late 1990s. The two economies have become more closely linked over the past ten years, due to the job growth in Chittenden County.

**Figure 7: Labor Force in Addison County by Town Annual Average 2000**



Source: BLS

**Figure 8: Wage and Salary and Proprietors' Employment 1990-1999**



Source: Bureau of Economic Analysis, REIS

- ⇒ Total Employment in Addison County increased by 16.9% over the 1990-1999 period.
- ⇒ Proprietors in Addison County represent over 26% of total employment. This is considerably less in Chittenden County, 18%.
  - ⇒ Construction employment increased significantly over the late 1990s (1997-1999); however there are only approximately 50 more jobs in 1999 than in 1990.
- ⇒ Manufacturing employment has increased over the late 1990s, but is down by over 400 jobs since 1990.
- ⇒ Transportation and Public Utilities experienced employment growth in the 1995-1999 period.
- ⇒ Wholesale trade employment peaked in 1994.
- ⇒ Retail Trade Employment has increased steadily over the 1990s.

**Figure 9:**

Source: VT Department of Employment and Training Web Site

⇒ In the State of Vermont, 50% of those employed in the agricultural industries are self-employed.

VERMONT SELF EMPLOYMENT AND AGRICULTURE	
Class of Worker	1999 Annual
Total Employment	326,000
All Agricultural Industries	8,000
Self Employed Agriculture	4,000
Wage & Salary Agriculture	4,000
All Nonagricultural Industries	318,000
Self Employed Nonagriculture	35,000
Wage & Salary Nonagriculture	283,000
Source: Geographic Profile of Employment and Unemployment, 1999 U.S. Department of Labor, Bureau of Labor Statistics	

*Last Updated on 5/28/01 By Mike Griffin*

### **Employment**

- ⇒ Wage and Salary Employment increased 17.3% between 1990 and 1999.
- ⇒ Proprietors' Employment increased 15.8%.
- ⇒ Total Employment in Addison County increased by 16.9% over the 1990-1999 period.
- ⇒ Proprietors in Addison County represent over 26% of total employment. This is considerably less in Chittenden County, 18%.
- ⇒ In the State of Vermont, 50% of those employed in the agricultural industries are self-employed.

### **Employment by Sector:**

Employment by sector has changed dramatically over the past thirty years.

- ⇒ Employment has more than doubled during this time.
- ⇒ The manufacturing sector contributes less to total employment.
- ⇒ Employment in the services sector contributes 17% more to total employment in 1999 than it did in 1970.
- ⇒ Farm employment contributes 13% less in 1999 than it did in 1970.

### **Personal Income**

Total personal income (TPI) includes the earnings (wages and salaries, other labor income, and proprietors' income); dividends, interest, and rent; and transfer payments received by the residents of Addison County.

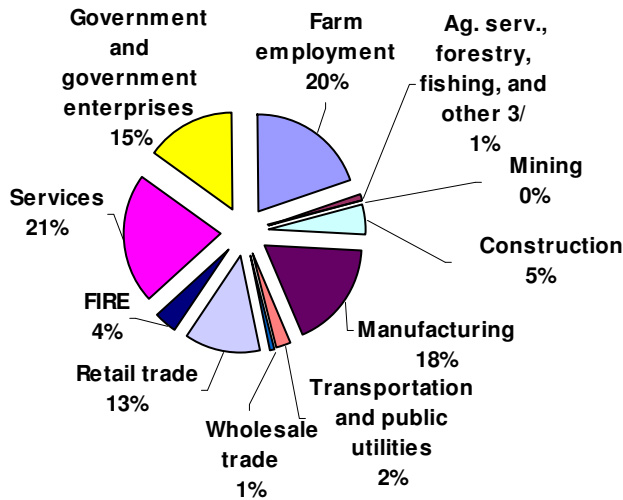
- ⇒ In 1999, Addison had a total personal income (TPI) of \$828,642.
- ⇒ This TPI ranked 8th in the State and accounted for 5.4 percent of the State total. In 1989, the TPI of Addison was \$508,034 and ranked 8th in the State.
- ⇒ The average annual growth rate of TPI over the past 10 years (1989-1999) was 5.0 percent.
- ⇒ The average annual growth rate for the State was 4.6 percent and for the nation was 5.4 percent.

#### ⇒ **Addison 1999 = 81.9% of US Per Capita Personal Income**

- ⇒ In 1999, earnings were 66.6 percent of TPI (compared with 69.0 percent in 1989); dividends, interest, and rent were 21.1 percent (compared with 20.6 percent in 1989); and transfer payments were 12.3 percent (compared with 10.4 percent in 1989).
- ⇒ From 1989 to 1999, earnings increased on average 4.6 percent each year; dividends, interest, and rent increased on average 5.3 percent; and transfer payments increased on average 6.8 percent.

Figure 10:

**Addison County Employment by Economic Sector: 1970**



Employment by sector has changed dramatically over the past thirty years.

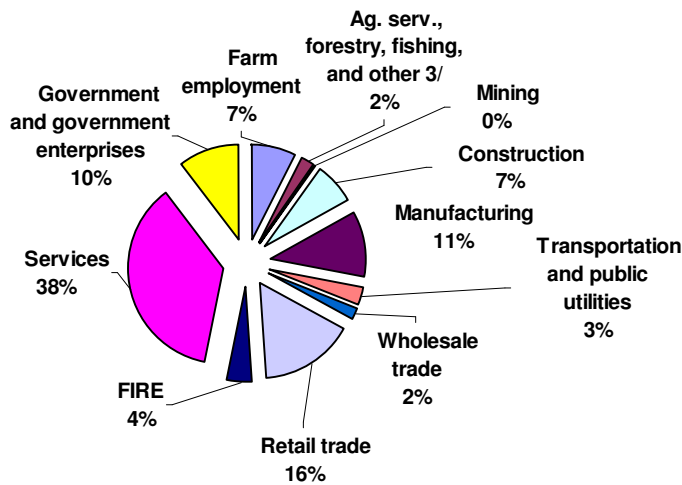
⇒ Employment in the services sector contributes 17% more to total employment in 1999 than it did in 1970.

⇒ Farm employment contributes 13% less in 1999 than it did in 1970.

⇒ Total Employment has more than doubled during this time.

⇒ The manufacturing sector contributes less to total employment.

**1999**

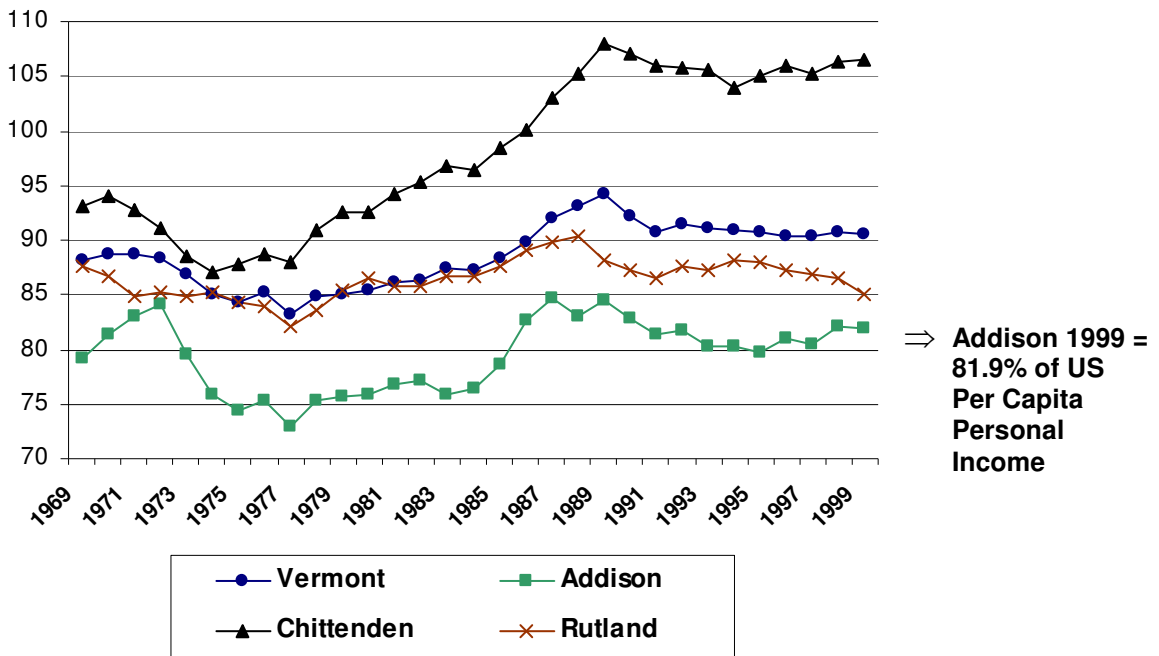


**Personal Income**

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- The average annual growth rate of TPI over the past 10 years (1989-1999) was 5.0 percent.
- The average annual growth rate for the State was 4.6 percent and for the nation was 5.4 percent.

**Figure 11: Percent of US per Capita Income**



Addison:

- ⇒ In 1999, earnings were 66.6 percent of TPI (compared with 69.0 percent in 1989); dividends, interest, and rent were 21.1 percent (compared with 20.6 percent in 1989); and transfer payments were 12.3 percent (compared with 10.4 percent in 1989).
- ⇒ From 1989 to 1999, earnings increased on average 4.6 percent each year; dividends, interest, and rent increased on average 5.3 percent; and transfer payments increased on average 6.8 percent.

## ECONOMIC SECTORS

Earnings data by sector is often used as a surrogate variable for output by sector at the regional level:

Real earnings per job is simply the earnings divided by employment for each industry. Increases in earnings per job can suggest productivity and competitive advantage for a region or industry.

**Figure 12: Real Earnings per Job Addison County, Vermont and US**

Addison County – Real Earnings Per Job	1970	1980	1990	1999	1970 to 1980 % Change	1980 to 1990 % Change	1990 to 1999 % Change
TOTAL EARNINGS (MILLIONS 1996 \$)	20.06	18.79	21.67	22.96	-0.6%	1.4%	0.6%
FARM EARNINGS .....	21.65	16.41	16.32	16.30	-2.7%	-0.1%	0.0%
AGRICULTURAL SERVICES, OTHER .	24.74	13.34	13.63	9.67	-6.0%	0.2%	-3.7%
MINING .....	200.00	1,569.00	23.05	27.41	22.9%	-34.4%	1.9%
CONSTRUCTION .....	19.45	19.90	23.67	23.98	0.2%	1.8%	0.1%
MANUFACTURING .....	27.71	26.64	35.02	37.98	-0.4%	2.8%	0.9%
TRANSPORT, COMM. & PUBLIC UTIL	25.62	24.46	22.57	30.22	-0.5%	-0.8%	3.3%
WHOLESALE TRADE .....	38.35	24.69	29.08	27.50	-4.3%	1.6%	-0.6%
RETAIL TRADE .....	17.51	14.63	15.46	16.47	-1.8%	0.5%	0.7%
FINANCE, INS. & REAL ESTATE ..	13.82	13.63	12.51	18.07	-0.1%	-0.9%	4.2%
SERVICES .....	14.76	15.02	18.93	21.60	0.2%	2.3%	1.5%
FEDERAL CIVILIAN GOVT .....	30.58	34.21	36.14	49.10	1.1%	0.5%	3.5%
FEDERAL MILITARY GOVT .....	4.86	7.02	11.07	17.02	3.8%	4.7%	4.9%
STATE AND LOCAL GOVT .....	19.39	18.38	26.24	27.72	-0.5%	3.6%	0.6%

Vermont – Real Earnings Per Job (000's)	1970	1980	1990	1999	1970 to 1980 % Change	1980 to 1990 % Change	1990 to 1999 % Change
TOTAL EARNINGS	\$22.24	\$21.62	\$24.13	\$25.47	-0.3%	1.1%	0.6%
FARM EARNINGS .....	\$18.57	\$14.00	\$12.87	\$13.92	-2.8%	-0.8%	0.9%
AGRICULTURAL SERVICES, OTHER .	\$19.29	\$13.58	\$14.30	\$11.83	-3.4%	0.5%	-2.1%
MINING .....	\$28.29	\$63.80	\$26.11	\$32.16	8.5%	-8.5%	2.3%
CONSTRUCTION .....	\$29.64	\$25.16	\$27.30	\$26.70	-1.6%	0.8%	-0.2%
MANUFACTURING .....	\$28.90	\$30.17	\$35.81	\$37.95	0.4%	1.7%	0.6%
TRANSPORT, COMM. & PUBLIC UTIL	\$30.60	\$34.42	\$34.28	\$36.95	1.2%	0.0%	0.8%
WHOLESALE TRADE .....	\$28.85	\$27.54	\$33.52	\$33.80	-0.5%	2.0%	0.1%
RETAIL TRADE .....	\$17.31	\$15.15	\$15.36	\$14.94	-1.3%	0.1%	-0.3%
FINANCE, INS. & REAL ESTATE ..	\$18.45	\$15.85	\$20.34	\$24.67	-1.5%	2.5%	2.2%
SERVICES .....	\$17.37	\$16.64	\$20.19	\$22.41	-0.4%	1.9%	1.2%
FEDERAL CIVILIAN GOVT .....	\$35.68	\$43.30	\$44.32	\$56.83	2.0%	0.2%	2.8%
FEDERAL MILITARY GOVT .....	\$5.99	\$8.11	\$11.97	\$16.73	3.1%	4.0%	3.8%
STATE AND LOCAL GOVT .....	\$21.50	\$21.89	\$28.65	\$30.43	0.2%	2.7%	0.7%

US- Real Earnings Per Job (000's)	1970	1980	1990	1999	1970 to 1980 % Change	1980 to 1990 % Change	1990 to 1999 % Change
TOTAL	26.07	27.43	29.39	32.42	0.5%	0.7%	1.1%
FARM EMPLOYMENT .....	16.79	10.16	16.25	13.63	-4.9%	4.8%	-1.9%
AGRICULTURAL SERVICES,OTHER	20.15	15.27	17.82	16.51	-2.7%	1.6%	-0.8%
MINING .....	33.58	51.61	40.78	54.61	4.4%	-2.3%	3.3%
CONSTRUCTION .....	34.65	34.23	33.29	33.52	-0.1%	-0.3%	0.1%
MANUFACTURING .....	31.75	36.50	39.45	44.69	1.4%	0.8%	1.4%
TRANSPORT, COMM. & PUBLIC UTIL	34.92	41.04	40.54	45.60	1.6%	-0.1%	1.3%
WHOLESALE TRADE .....	33.81	35.87	38.47	43.71	0.6%	0.7%	1.4%
RETAIL TRADE .....	18.78	17.14	16.38	16.97	-0.9%	-0.4%	0.4%
FINANCE, INS. & REAL ESTATE ..	20.31	20.88	26.60	38.41	0.3%	2.5%	4.2%
SERVICES .....	21.89	22.95	26.82	29.61	0.5%	1.6%	1.1%
FEDERAL CIVILIAN GOVT .....	37.83	46.80	49.50	60.28	2.2%	0.6%	2.2%
FEDERAL MILITARY GOVT .....	19.24	24.58	29.31	32.75	2.5%	1.8%	1.2%
STATE AND LOCAL GOVT .....	26.46	27.10	32.53	34.83	0.2%	1.8%	0.8%

\*Percent Change is average annual change

Source: BEA, Woods and Poole Economics, 2001

<b>Wages by Sector</b>	AVG UNIT	AVG EMP	TOT WAGE	AVG WAGE	CNFD	<b>% of Addison County Average wage</b>
ADDISON county	1195	13123	341604924	26032		100%
Private total	1081	11289	295247332	26153		100%
C. Contract Construction	140	632	18212608	28840		111%
15. General Building Contractors	57	350	11571970	33055		127%
16. Heavy Construction, excl Building	6	18	386003	21544		83%
17. Special Trade Contractors	77	264	6254635	23737		91%
D. Manufacturing	77	2252	77685732	34501		133%
Durable Goods	46	1433	51116290	35673		137%
24. Lumber & Wood Products	19	297	7639641	25730		99%
25. Furniture & Fixtures	4	25	480196	18893		73%
32. Stone,Clay & Glass Products					Y	0%
34. Fabricated Metal Products	6	95	2910850	30614		118%
35. Industrial Machinery					Y	0%
36. Electronic Equipment	4	82	1899997	23313		90%
37. Transportation Equipment					Y	0%
38. Instruments & Related Products					Y	0%
39. Miscellaneous Manufacturing	3	83	1713798	20586		79%

Addison County CEDS

Economic Analysis

Nondurable Goods	32	819	26569442	32451		125%
20. Food & Kindred Products	7	139	4234806	30503		117%
22. Textile Mill Products					Y	0%
23. Apparel & Other Textile Products	5	120	3071226	25576		98%
27. Printing & Publishing	12	296	11972314	40424		155%
28. Chemicals & Allied Products	3	177	4800361	27057		104%
29. Petroleum & Coal Products					Y	0%
30. Rubber & Misc. Plastic Products					Y	0%
E. Transportation & Public Utilities	57	462	11408919	24686		95%
41. Local Passenger Transit					Y	0%
42. Trucking & Warehousing	33	216	5328513	24622		95%
44. Water Transportation	4	16	284974	17719		68%
45. Air Transportation					Y	0%
47. Transportation Services	7	78	2292590	29392		113%
48. Communications	5	42	1012237	24149		93%
49. Electric, Gas & Sanitary Service					Y	0%
F. Wholesale	65	320	9920830	30970		119%
50. Durable Goods	36	150	4526940	30113		116%
						<b>% of Addison County Average wage</b>
TITLE	AVG_UNIT	AVG_EMP	TOT_WAGE	AVG_WAGE	CNFD	
51. Nondurable Goods	29	170	5393890	31729		122%
G. Retail	221	2563	45831921	17886		69%
52. Building & Garden Supplies	18	127	2925032	23123		89%
53. General Merchandise Stores	10	101	1180554	11669		45%
54. Food Stores	33	472	7148021	15144		58%
55. Auto Dealers & Service Stations	35	329	9322821	28373		109%
56. Apparel & Accessory Stores	9	30	273265	8984		35%
57. Furniture & Home Furnishings	11	68	1350631	20009		77%
58. Eating & Drinking Places	49	739	7790610	10544		41%
59. Miscellaneous Retail	56	698	15840987	22711		87%

## **Definitions**

### **SIC 15-17: CONSTRUCTION**

This division includes establishments primarily engaged in construction. The term construction includes new work, additions, alterations, reconstruction, installations, and repairs. Construction activities are generally administered or managed from a relatively fixed place of business, but the actual construction work is performed at one or more different sites. If a company has more than one relatively fixed place of business from which it undertakes or manages construction activities and for which separate data on the number of employees, payroll, receipts, and other establishment-type records are maintained, each such place of business is considered a separate construction establishment.

Three broad types of construction activity are covered: (1) building construction by general contractors or by operative builders; (2) heavy construction other than building by general contractors and special trade contractors; and (3) construction activity by other special trade contractors. Special trade contractors are primarily engaged in specialized construction activities, such as plumbing, painting, and electrical work, and work for general contractors under subcontract or directly for property owners. General contractors usually assume responsibility for an entire construction project, but may subcontract to others all of the actual construction work or those portions of the project that require special skills or equipment. General contractors thus may or may not have construction workers on their payroll.

Building construction general contractors are primarily engaged in the construction of dwellings, office buildings, stores, farm buildings, and other building construction projects. Operative builders who build on their own account for resale are also included in this division. However, investment builders who build structures on their own account for rental are classified in Real Estate, Major Group 65, but separate establishments primarily engaged in construction for the investment builder are classified in this division.

General contractors and special trade contractors for heavy construction other than building are primarily engaged in the construction of highways; pipelines, communications and power lines, and sewer and water mains; and other heavy construction projects. Special trade contractors are classified in heavy construction other than building if they are primarily engaged in activities such as grading for highway and airport runways; guardrail construction; installation of highway signs; asphalt and concrete construction of roads, highways, streets and public sidewalks; trenching; cable laying; conduit construction; underwater rock removal; pipeline wrapping; or land clearing and leveling.

Other special trade contractors undertake activities of a type that are either specialized to building construction or may be undertaken for building or nonbuilding projects. These activities include painting (including bridge painting and traffic lane painting) and electrical work (including work on bridges, power lines and power plants).

Force account construction is construction work performed by an establishment primarily engaged in some business other than construction, for its own account and use, and by employees of the establishment. This activity is not included in this division, but is classified according to the primary activity which is or will be performed in the establishment. However, construction work performed as the primary activity of a separate establishment of an enterprise for the enterprise's own account is included in this division.

The installation of prefabricated building equipment and materials by general and special trade contractors is classified in this division. Similar installation work performed as a service incidental to sale by employees of an establishment manufacturing or selling prefabricated equipment and materials is classified according to the primary activity in the Manufacturing or Trade Divisions. Establishments primarily engaged in the distribution and construction or installation of equipment often present classification problems. Since value added is not available for distinguishing the relative importance of sales versus installation or construction activities, payroll or employment may be used as measures yielding approximately the same results.

On this basis, separate establishments primarily engaged in the sale and installation of the following illustrative types of structures or integral parts of structures generally site assembled, are classified in construction rather than in trade:

a. Steel work on bridges or buildings; b. Elevators and escalators; c. Sprinkler systems; d. Central air-conditioning and heating equipment; e. Communications equipment; and f. Insulation materials.

On the other hand, establishments primarily engaged in the sale and installation of the following illustrative types of preassembled equipment are classified in trade rather than in construction:

a. Major household appliances, such as refrigerators, dishwashers, clothes washers and dryers, stoves and ranges; and b. Partitions for banks, stores, and restaurants.

### **SIC 20-39: MANUFACTURING**

The manufacturing division includes establishments engaged in the mechanical or chemical transformation of materials or substances into new products. These establishments are usually described as plants, factories, or mills and characteristically use power driven machines and materials handling equipment. Establishments engaged in assembling component parts of manufactured products are also considered manufacturing if the new product is neither a structure nor other fixed improvement. Also included is the blending of materials, such as lubricating oils, plastics resins, or liquors.

The materials processed by manufacturing establishments include products of agriculture, forestry, fishing, mining, and quarrying as well as products of other manufacturing establishments. The new product of a manufacturing establishment may be finished in the sense that it is ready for utilization or consumption, or it may be semifinished to become a raw material for an establishment engaged in further manufacturing. For example, the product of the copper smelter is the raw material used in electrolytic refineries; refined copper is the raw material used by copper wire mills; and copper wire is the raw material used by certain electrical equipment manufacturers.

The materials used by manufacturing establishments may be purchased directly from producers, obtained through customary trade channels, or secured without recourse to the market by transferring the product from one establishment to another which is under the same ownership. Manufacturing production is usually carried on for the wholesale market, for interplant transfer, or to order for industrial users, rather than for direct sale to the domestic consumer.

There are numerous borderline cases between manufacturing and other divisions of the classification system. Specific instances will be found in the descriptions of the individual industries. The following activities, although not always considered as manufacturing, are so classified:

Milk bottling and pasteurizing;

Fresh fish packaging (oyster shucking, fish filleting);

Apparel jobbing (assigning of materials to contract factories or shops for fabrication or other contract operations) as well as contracting on materials owned by others;

Publishing;  
Ready-mixed concrete production;  
Leather converting;  
Logging;  
Wood preserving;  
Various service industries to the manufacturing trade, such as typesetting, engraving, plate printing, and preparing electrotyping and stereotype plates, but not blueprinting or photocopying services;

Electroplating, plating, metal heat treating, and polishing for the trade;  
Lapidary work for the trade;  
Fabricating of signs and advertising displays.

There are also some manufacturing-type activities performed by establishments which are primarily engaged in activities covered by other divisions, and are, thus, not classified as manufacturing. A few of the more important examples are:

Agriculture, Forestry, and Fishing. Processing on farms is not considered manufacturing if the raw materials are grown on the farm and if the manufacturing activities are on a small scale without the extensive use of paid labor. Other exclusions are threshing and cotton ginning.

Mining. The dressing and beneficiating of ores; the breaking, washing, and grading of coal; the crushing and breaking of stone; and the crushing, grinding, or otherwise preparing of sand, gravel, and nonmetallic chemical and fertilizer minerals other than barite are classified in Mining.

Construction. Fabricating operations performed at the site of construction by contractors are not considered manufacturing, but the prefabrication of sheet metal, concrete, and terrazzo products and similar construction materials is included in the Manufacturing Division.

Wholesale and Retail Trade. Establishments engaged in the following types of operations are included in Wholesale or Retail Trade: cutting and selling purchased carcasses; preparing feed at grain elevators and farm supply stores; stemming leaf tobacco at wholesale establishments; and production of wiping rags. The breaking of bulk and redistribution in smaller lots, including packaging, repackaging, or bottling products, such as liquors or chemicals, is also classified as Wholesale or Retail Trade. Also included in Retail Trade are establishments primarily engaged in selling, to the general public, products produced on the same premises from which they are sold, such as bakeries, candy stores, ice cream parlors, and custom tailors.

Services. Tire retreading and rebuilding, sign painting and lettering shops, computer software production, and the production of motion picture films (including video tapes) are classified in Services. Most repair activities are classified as Services. However, some repair activity such as shipbuilding and boatbuilding and repair, the rebuilding of machinery and equipment on a factory basis, and machine shop repair are classified as manufacturing.

#### **SIC 40-49: TRANSPORTATION AND PUBLIC UTILITIES**

This division includes establishments providing, to the general public or to other business enterprises, passenger and freight transportation, communications services, or electricity, gas, steam, water or sanitary services, and all establishments of the United States Postal Service.

For many of the industries in this division, the establishments have activities, workers, and physical facilities distributed over an extensive geographic area. For this division, the establishment is represented by a relatively permanent office, shop, station, terminal, or warehouse, etc. that is either (1) directly responsible for supervising such activities or (2) the base from which personnel operate to carry out these activities.

Many of the industries are engaged in various related activities. For example, establishments of communications, pipeline, and utility enterprises include a variety of activities, such as power generation, pumping, transmission, and distribution. Establishments primarily engaged in such activities are all classified in this division. Establishments primarily engaged in new or replacement construction for establishments of these types of enterprises are classified as

operating establishments in Division C, Construction. Locations engaged in activities such as sales of electric appliances to household consumers are classified in Division G, Retail Trade.

The establishments classified in this division furnish services to the general public or to other business enterprises; establishments which furnish similar services only to other establishments of the same enterprise are classified as auxiliary to the establishments or units of the enterprise which they serve. However, separate establishments primarily engaged in long-distance trucking, stevedoring, water transportation, or pipeline transportation are classified according to their activity and not as auxiliaries, even though they serve only establishments of the same enterprise.

### **SIC 50 and 51: WHOLESALE TRADE**

This division includes establishments or places of business primarily engaged in selling merchandise to retailers; to industrial, commercial, institutional, farm, construction contractors, or professional business users; or to other wholesalers; or acting as agents or brokers in buying merchandise for or selling merchandise to such persons or companies.

The chief functions of establishments included in Wholesale Trade are selling goods to trading establishments, or to industrial, commercial, institutional, farm, construction contractors, or professional business users; and bringing buyer and seller together. In addition to selling, functions frequently performed by wholesale establishments include maintaining inventories of goods; extending credit; physically assembling, sorting, and grading goods in large lots; breaking bulk and redistribution in smaller lots; delivery; refrigeration; and various types of promotion such as advertising and label designing.

The principal types of establishments included are: (1) merchant wholesalers-wholesalers who take title to the goods they sell, such as wholesale merchants or jobbers, industrial distributors, voluntary group wholesalers, exporters, importers, cash-and-carry wholesalers, drop shippers, truck distributors, retailer cooperative warehouses, terminal elevators, cooperative buying associations, and assemblers, buyers or cooperatives engaged in the marketing of farm products; (2) sales branches and sales offices (but not retail stores) maintained by manufacturing, refining or mining enterprises apart from their plants or mines for the purpose of marketing their products; and (3) agents, merchandise or commodity brokers, and commission merchants.

Establishments primarily engaged in selling merchandise to construction contractors, institutions, industrial users, or businesses are included in Wholesale Trade with a few exceptions. These exceptions are made necessary because of sales to both the general public for personal or household consumption and to businesses, industrial users, or construction contractors. These exceptions are lumber yards; paint, glass, and wallpaper stores, typewriter stores; stationery stores; and gasoline service stations which are classified in Retail Trade, Division G.

However, establishments that sell similar products only to institutions, industrial users, and establishments that sell merchandise for use exclusively by business establishments or to other wholesalers are classified in Wholesale Trade. Establishments primarily engaged in selling such merchandise as plumbing equipment; electrical supplies; used automobile parts; and office furniture are classified in Wholesale Trade, even if a higher proportion of their sales is made to individuals for household use. Establishments primarily engaged in the wholesale distribution of used products are classified on the basis of the products sold.

Guidelines for the classification of establishments primarily engaged in the wholesale distribution and construction or installation of equipment manufactured by other establishments are outlined in the Introduction to Division C, Construction.

### **SIC 52-59: RETAIL TRADE**

This division includes establishments engaged in selling merchandise for personal or household consumption and rendering services incidental to the sale of the goods. In general, retail establishments are classified by kind of business according to the principal lines of commodities sold (groceries, hardware, etc.), or the usual trade designation (drug store, cigar store, etc.). Some of the important characteristics of retail trade establishments are: the establishment is usually a place of business and is engaged in activities to attract the general public to buy; the establishment buys or receives merchandise as well as sells; the establishment may process its products, but such processing is incidental or subordinate to selling; the establishment is considered as retail in the trade; and the establishment sells to customers for personal or household use. Not all of these characteristics need be present and some are modified by trade practice.

For the most part, establishments engaged in retail trade sell merchandise to the general public for personal or household consumption. Exceptions to this general rule are lumber yards; paint, glass, and wallpaper stores; typewriter stores; stationery stores; and gasoline service stations which sell to both the general public for personal or household consumption and to businesses. These types of stores are classified in Retail Trade even if a higher proportion of their sales is made to other than individuals for personal or household consumption. However, establishments that sell these products only to institutional or industrial users and to other wholesalers and establishments that sell similar merchandise for use exclusively by business establishments are classified in Wholesale Trade.

Establishments primarily engaged in selling such merchandise as plumbing equipment; electrical supplies; used automobile parts; and office furniture are classified in Wholesale Trade, even if a higher proportion of their sales is made to individuals for personal or household consumption. Buying of goods for resale to the consumer is a characteristic of retail trade establishments that particularly distinguishes them from the agricultural and extractive industries. For example, farmers who sell only their own produce at or from the point of production are not classified as retailers.

Processing incidental or subordinate to selling often is conducted at retail stores. For example, restaurants prepare meals, and meat markets cut meat. Separate establishments selling merchandise for personal or household consumption which has been manufactured by other establishments of the same company are classified in Retail Trade.

Chain store warehouses are considered auxiliary to the retail establishment served and are classified on the basis of the activity carried on by such retail stores.

Establishments primarily engaged in the retail sale of used motor vehicles, trailers, and boats are classified in Major Group 55; those selling used mobile homes are classified in Industry 5271; those selling used automobile parts are classified in Wholesale Trade, Industry 5015; and those selling all other used merchandise are classified in Industry Group 593. Establishments primarily engaged in non-store retailing are classified in Industry Group 596.

#### Location Quotient Analysis

Location quotient analysis indicates which industries have a comparatively larger (or smaller) presence in the local economy. Industries with a location quotient greater than one indicate relatively high production of a good or service; therefore, it is likely that some amount is being exported.

What is a Location Quotient?

Location quotients (LQ) are fractions that compare the concentration of employment in a particular industry at different geographical levels. For this document, location quotients have

been calculated that compare regional employment concentrations to national employment concentrations in the same industry. A ratio below 1.0 means that the region has a lower percentage of employment than the national average. A ratio equal to 1 means that the region has the same percentage as the national average and above 1.0 means that the region has a greater share of employment than the state average.

Location quotients can help to determine whether an area is importing or exporting services. A  $LQ > 1$  can mean that a region is producing more of a particular product than the local population can consume and is probably exporting the excess. A  $LQ < 1$  can mean that there is a leakage in the local economy and that there are not enough workers in a particular industry to meet local demand so the region must import. Importing is very costly to an economy and may represent a major economic opportunity for increasing local wealth. Finally, it must be noted that LQ's do not in themselves prove anything. They are but a simple tool to highlight possible areas of concern.

The next section describes each sector in detail. The following outline will be used to review each sector:

- A. Earnings
- B. Employment
- C. Wages
- D. Location Quotient Analysis (please see Appendix \_\_\_ for detail)
- E. Qualitative Analysis

## **SIC 01-09: FARM AND AGRICULTURAL SERVICES**

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### **Farms**

This division includes establishments primarily engaged in agricultural production, forestry, commercial fishing, hunting and trapping, and related services.

The classification of agricultural production covers establishments (e.g., farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries) primarily engaged in the production of crops, plants, vines, or trees (excluding forestry operations); and the keeping, grazing, or feeding of livestock for the sale of livestock or livestock products (including serums), for livestock increase, or for value increase. Livestock as used here includes cattle, sheep, goats, hogs, and poultry. Also included are animal specialties, such as horses, rabbits, bees, pets, fur-bearing animals in captivity, and fish in captivity. Agricultural production also includes establishments primarily engaged in the operation of sod farms, cranberry bogs, and poultry hatcheries; in the production of mushrooms, bulbs, flower seeds, and vegetable seeds; and in the growing of hydroponic crops.

Farms are the establishment units generally utilized for the purpose of industrial classification of agricultural production. A farm may consist of a single tract of land or a number of separate tracts which may be held under different tenures. For example, one tract may be owned by the farm operator and another rented. It may be operated by the operator alone or with the assistance of members of the household or hired employees, or it may be operated by a partnership, corporation, or other type of organization. When a landowner has one or more tenants, renters, croppers, or managers, the land operated by each is considered a farm.

**Agricultural Services**

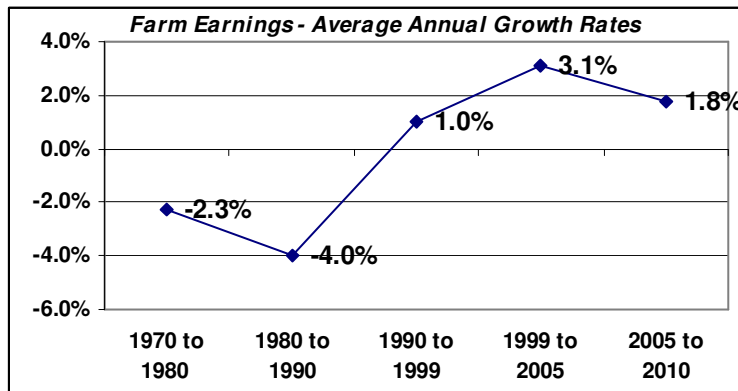
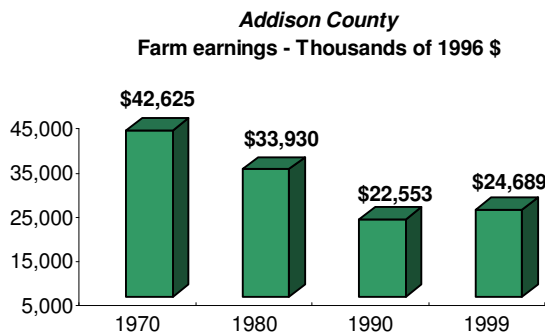
The classification of agricultural services includes establishments primarily engaged in supplying soil preparation services, crop services, landscape and horticultural services, veterinary and other animal services, and farm labor and management services.

The classification of forestry covers establishments primarily engaged in the operation of timber tracts, tree farms, or forest nurseries; in the gathering of forest products; or in performing forestry services. Logging establishments are classified in Manufacturing, Industry 2411.

The classification of fishing and hunting and trapping covers establishments primarily engaged in commercial fishing (including shellfish and marine products); in operating fish hatcheries and fish and game preserves; and in commercial hunting and trapping.

**A. Earnings**

**Figure \_\_: Farm Earnings and Growth Rates**



Source: BEA & Woods and Poole Economics - CEDS Analysis

Real farm earnings have decreased substantially since 1970; however, there has been an increase in earnings over the 1990-1999 period.

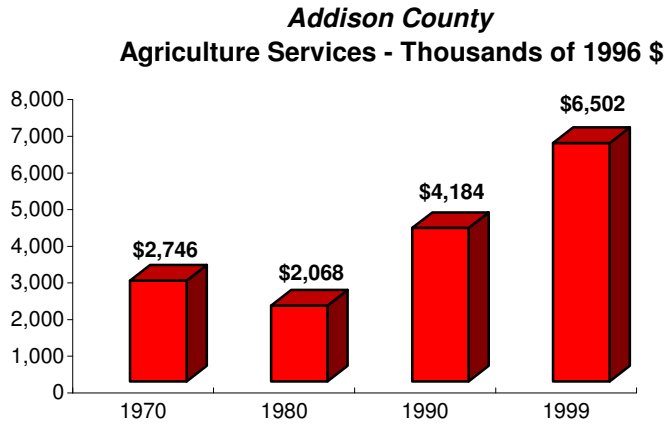
In 1999, Farm earnings were 5.2% of Total Earnings of the County.

The 1997 Census of Agriculture reports that Addison County has 204,985 acres in farm production and 683 farms. Over 16.2% of total farming acreage in Vermont is in Addison County, compared to its 8% contribution to total land area.

Approximately 450 farm operators of the 683 call farming their principal occupation. The only county with more farms is Franklin County; however the market value of agricultural products sold is greater in Addison (23.6% of state total) as is the average and median farm size.

Farm earnings are expected to grow over the next ten years.

Real earnings in agriculture services have steadily increased since 1980. In addition, real earnings per job have increased. This may indicate better quality jobs and more output per job.



Source: BEA, CEDS Analysis

Farm earnings were 5.2% of all earnings in 1999.

Projections call for steady growth in earnings in this sector and a small decline in employment over the 2000-2010 period.

Second behind Grand Isle in projections for concentration in farm employment for 2010.

**Agriculture Services**

**B. Employment**

<b>Addison Economic Sector – Employment</b>	<b>1970</b>	<b>1980</b>	<b>1990</b>	<b>1999</b>	<b>1970 to 1980 % Change</b>	<b>1980 to 1990 % Change</b>	<b>1990 to 1999 % Change</b>	<b>1999 % of Total</b>
Farm employment	1,969	2,068	1,382	1,516	0.5%	-4.0%	1.0%	7.4%
Ag. serv., forestry, fishing, other	111	155	307	458	3.4%	7.1%	4.5%	2.2%

Source: BEA, CEDS Analysis

The most drastic decrease in farm employment came between 1980 and 1990. During this time employment decreased at an annual rate of 4.0%. Since 1990, employment (REIS - wage and salary and self-employed) has increased at an annual rate of 1% per year. Real earnings per job have remained static since 1990.

Agricultural Services employment has steadily increased from 111 in 1970 to 458 in 1999.

**C. Wages**

The average wage for wage and salary jobs in agriculture, forestry and fishing reported by DET for this sector was \$19,616 in 2000. This reflects 72.6% of the average wage for Addison County as a whole.

**D. Location Quotient**

**E. Qualitative Analysis**

The number of farms has decreased over the past 30 years.

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**SIC 10-14: MINING**

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This division includes all establishments primarily engaged in mining. The term mining is used in the broad sense to include the extraction of minerals occurring naturally: solids, such as coal and ores; liquids, such as crude petroleum; and gases such as natural gas. The term mining is also used in the broad sense to include quarrying, well operations, milling (e.g., crushing, screening, washing, flotation), and other preparation customarily done at the mine site, or as a part of mining activity.

Exploration and development of mineral properties are included. Services performed on a contract or fee basis in the development or operation of mineral properties are classified separately but within this division. Establishments which have complete responsibility for operating mines, quarries, or oil and gas wells for others on a contract or fee basis are classified according to the product mined rather than as mineral services.

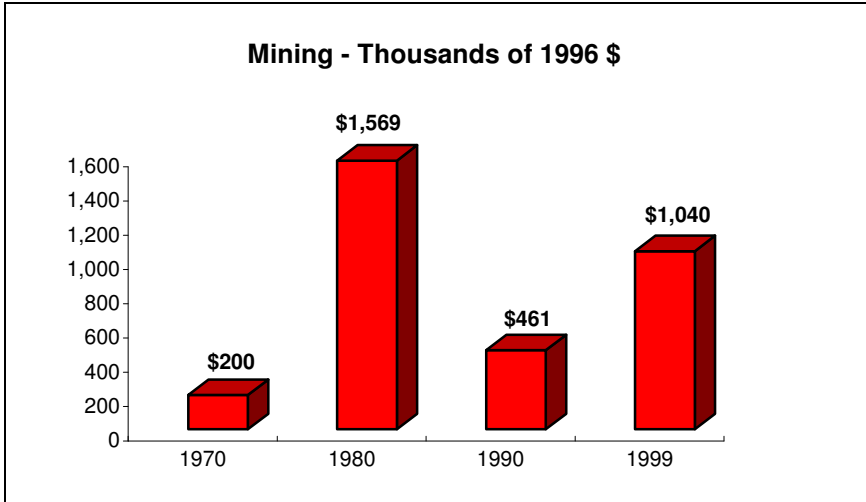
Mining operations are classified, by industry, on the basis of the principal mineral produced, or, if there is no production, on the basis of the principal mineral for which exploration or development work is in process. The mining of culm banks, ore dumps, and tailing piles is classified as mining according to the principal mineral product derived.

The purification and distribution of water is classified in Transportation and Public Utilities, Industry 4941, and the bottling and distribution of natural spring and mineral waters is classified in Wholesale Trade, Industry 5149.

Crushing, grinding, or otherwise preparing clay, ceramic, and refractory minerals; barite, and miscellaneous nonmetallic minerals, except fuels, not in conjunction with mining or quarrying operations, are classified in Manufacturing, Industry 3295. Dressing of stone or slabs is classified in Manufacturing, Industry 3281, whether or not mining is done at the same establishment.

Real Earnings Per Job increased over the 1990s.  
Employment is projected to remain at .2% of total employment.

**A. Earnings**



Source: BEA, CEDS Analysis

Earnings in mining have fluctuated over the past 30 years. This is primarily due to .....

**B. Employment**

<i>Addison Economic Sector - Employment</i>	<i>1970</i>	<i>1980</i>	<i>1990</i>	<i>1999</i>	<i>1970 to 1980 % Change</i>	<i>1980 to 1990 % Change</i>	<i>1990 to 1999 % Change</i>	<i>1999 % of Total</i>
Mining	0	9	20	49	#DIV/0!	8.3%	10.5%	0.2%

Source: BEA, CEDS Analysis

Mining employment provided .2% of total employment in Addison County in 1999.

**C. Wages**

The 2000 DET Covered Average Wage was \$25,333. This is 94% of County Average Wage.

**D. Location Quotients**

NA

**E. Qualitative Analysis**

**SIC 15-17: CONSTRUCTION**

This division includes establishments primarily engaged in construction. The term construction includes new work, additions, alterations, reconstruction, installations, and repairs. Construction activities are generally administered or managed from a relatively fixed place of business, but the actual construction work is performed at one or more different sites. If a company has more than one relatively fixed place of business from which it undertakes or manages construction activities and for which separate data on the number of employees, payroll, receipts, and other establishment-type records are maintained, each such place of business is considered a separate construction establishment.

Three broad types of construction activity are covered: (1) building construction by general contractors or by operative builders; (2) heavy construction other than building by general contractors and special trade contractors; and (3) construction activity by other special trade contractors. Special trade contractors are primarily engaged in specialized construction activities,

such as plumbing, painting, and electrical work, and work for general contractors under subcontract or directly for property owners. General contractors usually assume responsibility for an entire construction project, but may subcontract to others all of the actual construction work or those portions of the project that require special skills or equipment. General contractors thus may or may not have construction workers on their payroll.

Building construction general contractors are primarily engaged in the construction of dwellings, office buildings, stores, farm buildings, and other building construction projects. Operative builders who build on their own account for resale are also included in this division. However, investment builders who build structures on their own account for rental are classified in Real Estate, Major Group 65, but separate establishments primarily engaged in construction for the investment builder are classified in this division.

General contractors and special trade contractors for heavy construction other than building are primarily engaged in the construction of highways; pipelines, communications and power lines, and sewer and water mains; and other heavy construction projects. Special trade contractors are classified in heavy construction other than building if they are primarily engaged in activities such as grading for highway and airport runways; guardrail construction; installation of highway signs; asphalt and concrete construction of roads, highways, streets and public sidewalks; trenching; cable laying; conduit construction; underwater rock removal; pipeline wrapping; or land clearing and leveling.

Other special trade contractors undertake activities of a type that are either specialized to building construction or may be undertaken for building or nonbuilding projects. These activities include painting (including bridge painting and traffic lane painting) and electrical work (including work on bridges, power lines and power plants).

Force account construction is construction work performed by an establishment primarily engaged in some business other than construction, for its own account and use, and by employees of the establishment. This activity is not included in this division, but is classified according to the primary activity which is or will be performed in the establishment. However, construction work performed as the primary activity of a separate establishment of an enterprise for the enterprise's own account is included in this division.

The installation of prefabricated building equipment and materials by general and special trade contractors is classified in this division. Similar installation work performed as a service incidental to sale by employees of an establishment manufacturing or selling prefabricated equipment and materials is classified according to the primary activity in the Manufacturing or Trade Divisions. Establishments primarily engaged in the distribution and construction or installation of equipment often present classification problems. Since value added is not available for distinguishing the relative importance of sales versus installation or construction activities, payroll or employment may be used as measures yielding approximately the same results.

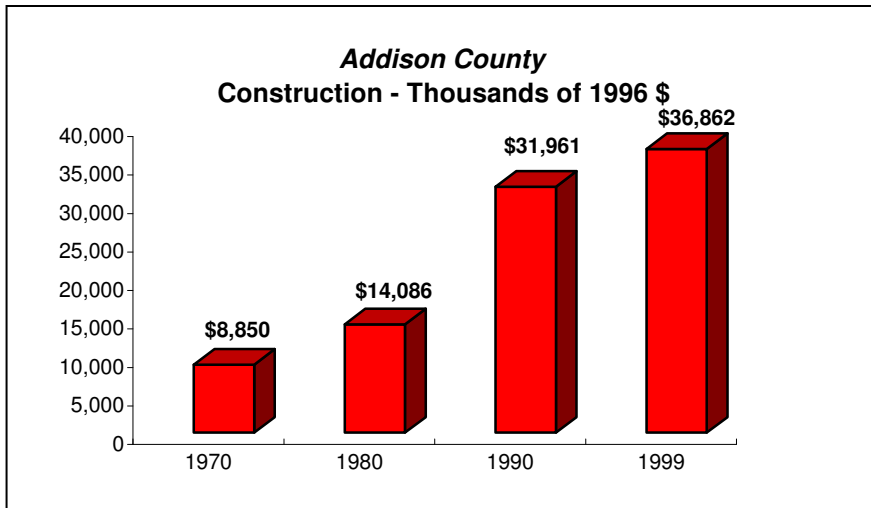
On this basis, separate establishments primarily engaged in the sale and installation of the following illustrative types of structures or integral parts of structures generally site assembled, are classified in construction rather than in trade:

a. Steel work on bridges or buildings; b. Elevators and escalators; c. Sprinkler systems; d. Central air-conditioning and heating equipment; e. Communications equipment; and f. Insulation materials.

On the other hand, establishments primarily engaged in the sale and installation of the following illustrative types of preassembled equipment are classified in trade rather than in construction:

a. Major household appliances, such as refrigerators, dishwashers, clothes washers and dryers, stoves and ranges; and b. Partitions for banks, stores, and restaurants.

**A. Earnings**



Source: BEA, CEDS Analysis

Earnings in this sector have increased slightly since 1990.

**B. Employment**

<i>Addison Economic Sector Employment</i>	<i>1970</i>	<i>1980</i>	<i>1990</i>	<i>1999</i>	<i>1970 to 1980 % Change</i>	<i>1980 to 1990 % Change</i>	<i>1990 to 1999 % Change</i>	<i>1999 % of Total</i>
Construction	455	708	1,350	1,406	4.5%	6.7%	0.5%	6.9%

Source: BEA, CEDS Analysis

The change in earnings may indicate less part-time employment and more full-time employment. Rutland Economic Sector

**C. Wages**

The average construction wage in 1999 was \$28,840. This is approximately 110% of the average wage across all industries. Contract construction provided the highest wage for this industry.

**D. Location Quotient**

**E. Qualitative Analysis  
SIC 20-39: MANUFACTURING**

The manufacturing division includes establishments engaged in the mechanical or chemical transformation of materials or substances into new products. These establishments are usually described as plants, factories, or mills and characteristically use power driven machines and materials handling equipment. Establishments engaged in assembling component parts of manufactured products are also considered manufacturing if the new product is neither a structure nor other fixed improvement. Also included is the blending of materials, such as lubricating oils, plastics resins, or liquors.

The materials processed by manufacturing establishments include products of agriculture, forestry, fishing, mining, and quarrying as well as products of other manufacturing establishments. The new product of a manufacturing establishment may be finished in the sense that it is ready for utilization or consumption, or it may be semifinished to become a raw material for an establishment engaged in further manufacturing. For example, the product of the copper smelter is the raw material used in electrolytic refineries; refined copper is the raw material used by copper wire mills; and copper wire is the raw material used by certain electrical equipment manufacturers.

The materials used by manufacturing establishments may be purchased directly from producers, obtained through customary trade channels, or secured without recourse to the market by transferring the product from one establishment to another which is under the same ownership. Manufacturing production is usually carried on for the wholesale market, for interplant transfer, or to order for industrial users, rather than for direct sale to the domestic consumer.

There are numerous borderline cases between manufacturing and other divisions of the classification system. Specific instances will be found in the descriptions of the individual industries. The following activities, although not always considered as manufacturing, are so classified:

Milk bottling and pasteurizing;  
Fresh fish packaging (oyster shucking, fish filleting);  
Apparel jobbing (assigning of materials to contract factories or shops for fabrication or other contract operations) as well as contracting on materials owned by others;  
Publishing;  
Ready-mixed concrete production;  
Leather converting;  
Logging;  
Wood preserving;  
Various service industries to the manufacturing trade, such as typesetting, engraving, plate printing, and preparing electrotyping and stereotype plates, but not blueprinting or photocopying services;

Electroplating, plating, metal heat treating, and polishing for the trade;  
Lapidary work for the trade;  
Fabricating of signs and advertising displays.

There are also some manufacturing-type activities performed by establishments which are primarily engaged in activities covered by other divisions, and are, thus, not classified as manufacturing. A few of the more important examples are:

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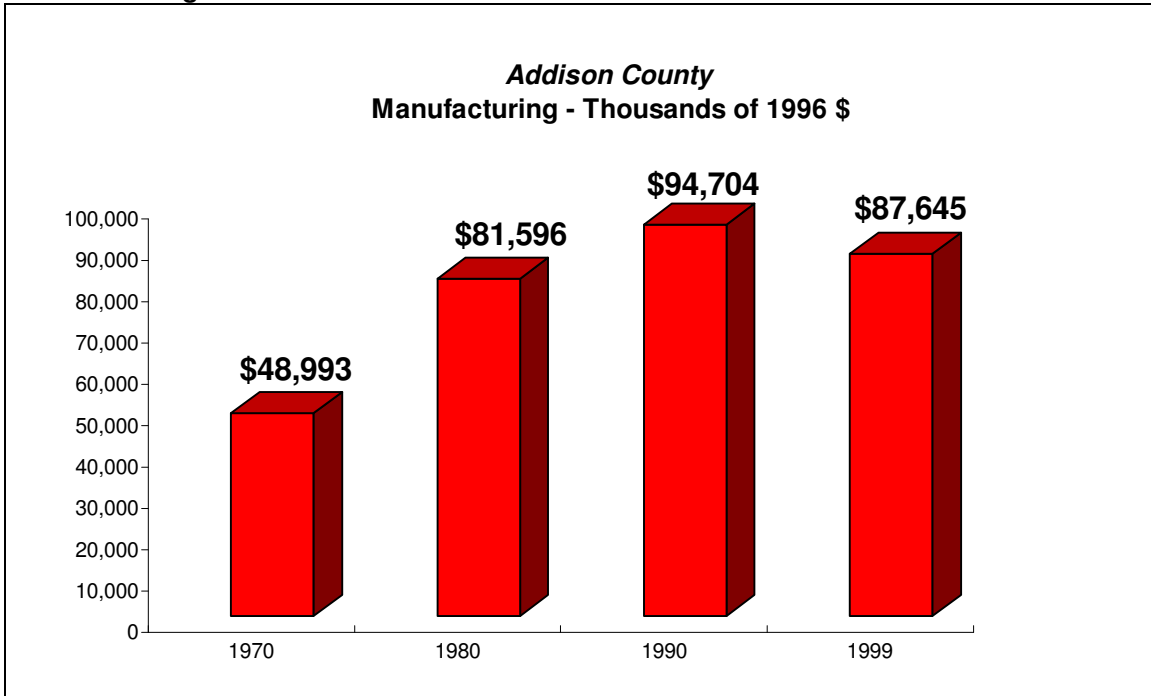
Construction. Fabricating operations performed at the site of construction by contractors are not considered manufacturing, but the prefabrication of sheet metal, concrete, and terrazzo products and similar construction materials is included in the Manufacturing Division.

Wholesale and Retail Trade. Establishments engaged in the following types of operations are included in Wholesale or Retail Trade: cutting and selling purchased carcasses; preparing feed at grain elevators and farm supply stores; stemming leaf tobacco at wholesale establishments; and production of wiping rags. The breaking of bulk and redistribution in smaller lots, including packaging, repackaging, or bottling products, such as liquors or chemicals, is also classified as Wholesale or Retail Trade. Also included in Retail Trade are establishments primarily engaged in

selling, to the general public, products produced on the same premises from which they are sold, such as bakeries, candy stores, ice cream parlors, and custom tailors.

Services. Tire retreading and rebuilding, sign painting and lettering shops, computer software production, and the production of motion picture films (including video tapes) are classified in Services. Most repair activities are classified as Services. However, some repair activity such as shipbuilding and boatbuilding and repair, the rebuilding of machinery and equipment on a factory basis, and machine shop repair are classified as manufacturing.

**A. Earnings**



Source: BEA, CEDS Analysis

Earnings in manufacturing have decreased slightly over the period 1990-1999. The greatest growth in earnings occurred between 1970 and 1980.

**B. Employment**

Employment over the 1990-1999 period decreased while earnings per worker increased.

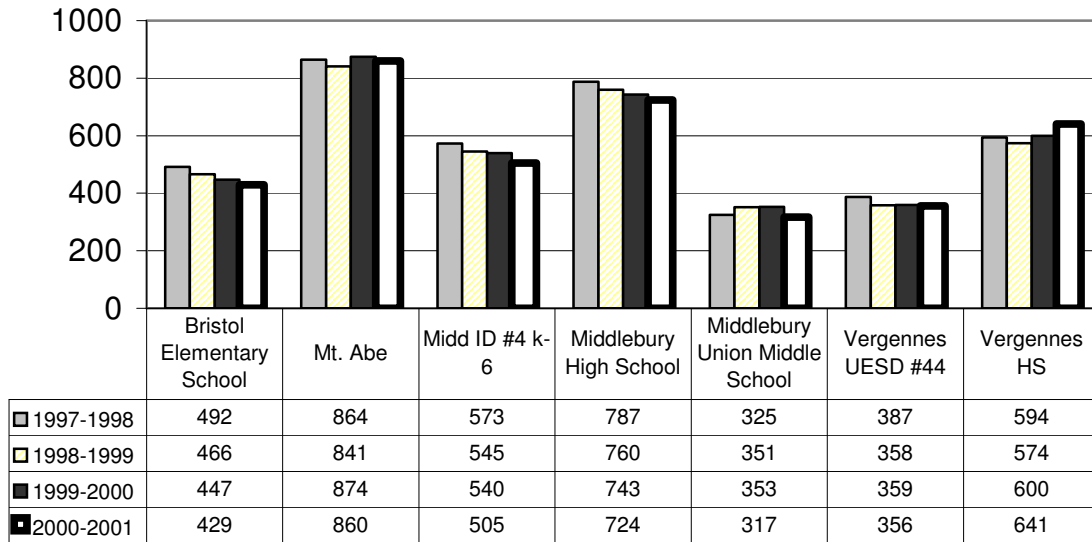
**C. Wages**

Some data are confidential at the county level due to the small number of firms in some of the sub-sectors. At the state level, more data are available:

**D. Location Quotient/Shiftshare Analysis**

**E. Qualitative Analysis**

**Total Enrollment: Schools in Bristol, Middlebury and Vergennes**



Source: Vermont Department of Education

**Student/Teacher Ratio**

School	1997-1998	1998-1999	1999-2000	2000-2001
<b>Bristol</b>	16.3	14.6	13.7	13.3
<b>Mt Abe</b>	12.9	12	12	11.4
<b>Midd ID #4 k-6</b>	15	13.9	13.7	12.6
<b>Middlebury High School</b>	10.9	10.6	10.2	13.4
<b>Middlebury Union Middle School</b>	10.4	11.1	10.8	9.5
<b>Vergennes UESD #44</b>	13.5	12.3	12	11.3
<b>Vergennes HS</b>	12.6	12.3	12.3	12.8

Source: Vermont Department of Education

**Employment and Wages****Employment and Wages: 2000**

<b>Industry</b>	<b>Number of Employing Units</b>	<b>Employment</b>	<b>Total Wages</b>	<b>Average Wage</b>
<b>ADDISON county</b>	<b>1,246</b>	<b>13,726</b>	<b>\$ 370,795,136</b>	<b>\$ 27,015</b>
<b>Private total</b>	<b>1,132</b>	<b>11,748</b>	<b>\$ 320,540,038</b>	<b>\$ 27,284</b>
<b>Government total</b>	<b>114</b>	<b>1,977</b>	<b>\$ 50,255,098</b>	<b>\$ 25,418</b>
<b>Federal government</b>	<b>39</b>	<b>154</b>	<b>\$ 4,983,102</b>	<b>\$ 32,428</b>
<b>State government</b>	<b>12</b>	<b>187</b>	<b>\$ 5,250,411</b>	<b>\$ 28,052</b>
<b>I. Services</b>	<b>5</b>	<b>91</b>	<b>\$ 1,909,862</b>	<b>\$ 21,084</b>
<b>73. Business Services</b>	<b>1</b>	<b>12</b>	<b>\$ 395,122</b>	<b>\$ 34,111</b>
<b>82. Educational Services</b>	<b>2</b>	<b>50</b>	<b>\$ 544,899</b>	<b>\$ 10,934</b>
<b>83. Social Services</b>	<b>2</b>	<b>29</b>	<b>\$ 969,841</b>	<b>\$ 33,252</b>
<b>J. Public Administration</b>	<b>6</b>	<b>71</b>	<b>\$ 2,478,469</b>	<b>\$ 34,826</b>
<b>92. Justice, Public Order &amp; Safety</b>	<b>3</b>	<b>36</b>	<b>\$ 1,257,195</b>	<b>\$ 34,841</b>
<b>94. Admin of Human Resources</b>	<b>1</b>	<b>11</b>	<b>\$ 359,202</b>	<b>\$ 33,940</b>
<b>95. Environmental Quality &amp; Housing</b>	<b>2</b>	<b>25</b>	<b>\$ 862,072</b>	<b>\$ 35,187</b>
<b>Local government</b>	<b>63</b>	<b>1,636</b>	<b>\$ 40,021,585</b>	<b>\$ 24,458</b>
<b>I. Services</b>	<b>30</b>	<b>1,392</b>	<b>\$ 34,944,583</b>	<b>\$ 25,098</b>
<b>73. Business Services</b>	<b>1</b>	<b>5</b>	<b>\$ 50,354</b>	<b>\$ 10,790</b>
<b>79. Amusement &amp; Recreation Services</b>	<b>1</b>	<b>14</b>	<b>\$ 182,832</b>	<b>\$ 13,378</b>
<b>82. Educational Services</b>	<b>28</b>	<b>1,374</b>	<b>\$ 34,711,397</b>	<b>\$ 25,263</b>

Source: ES-202 Employment &amp; Wages Program

- ⇒ The average annual wage in Local Government - Educational Services is slightly less than the average wage in the private sector. Teachers are included in total for educational services, however, data for teachers specifically is not disclosed by the Bureau of Labor Statistics.

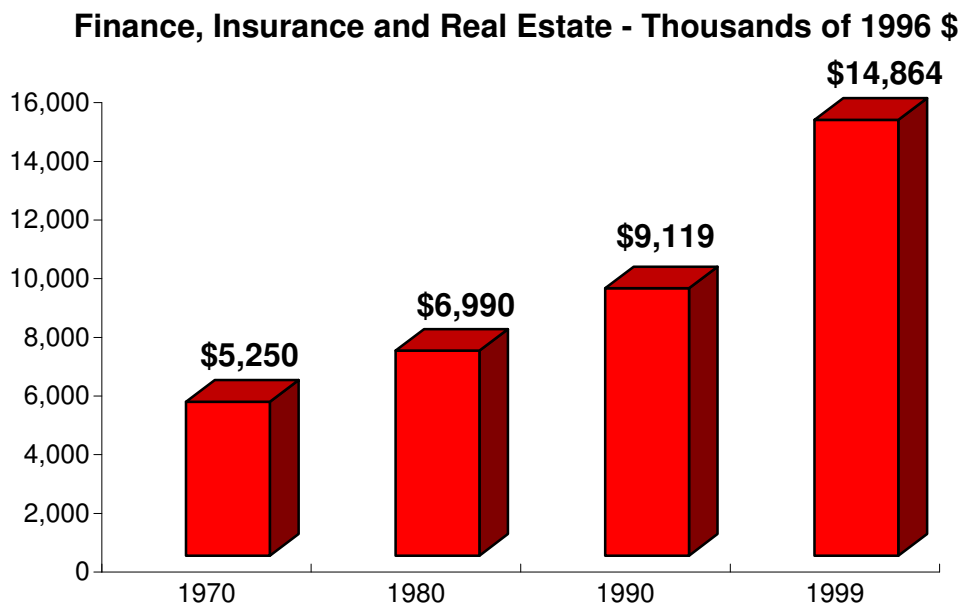
### Finance, Insurance and Real Estate (FIRE)

This division includes establishments operating primarily in the fields of finance, insurance, and real estate. Finance includes depository institutions, non-depository credit institutions, holding (but not predominantly operating) companies, other investment companies, brokers and dealers in securities and commodity contracts, and security and commodity exchanges. Insurance covers carriers of all types of insurance, and insurance agents and brokers. Real estate includes owners, lessors, lessees, buyers, sellers, agents, and developers of real estate. Establishments primarily engaged in the construction of buildings for sale (operative builders) are classified in Construction, Industry 1531.

### Services

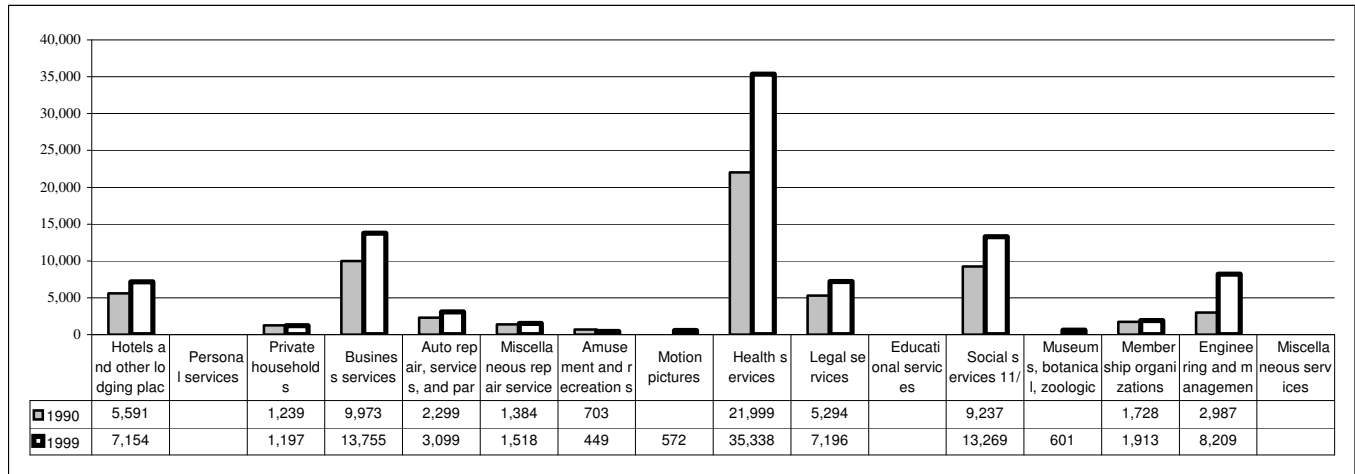
This division includes establishments primarily engaged in providing a wide variety of services for individuals, business and government establishments, and other organizations. Hotels and other lodging places; establishments providing personal, **business**, repair, and amusement services; health, **legal, engineering, and other professional services**; educational institutions; membership organizations, and other miscellaneous services, are included.

Establishments which provide specialized services closely allied to activities covered in other divisions are classified in such divisions.



Earnings in the FIRE sector have increased substantially over the past ten years. Real Earnings per Job also increased. This industry is projected to grow over the next ten years at approximately the same rate as total employment.

**Earnings in Services by Detailed Industry - Thousand of 1996 \$**



Source: US Bureau of Labor Statistics \*blanks indicate no data for confidentiality.

Category	Earnings	Percent of Total
Total Services	\$161,740	100%
Business Services	\$13,755	9%
Legal Services	\$7,196	4%
Engineering and Management	\$8,209	5%

**Employment**

Addison Economic Sector - Employment	1970	1980	1990	1999	1970 to 1999 %			
					1970 to 1980 % Change	1980 to 1990 % Change	1990 to 1999 % Change	1999 % of Total
FIRE	380	513	729	838	3.0%	3.6%	1.6%	4.1%
Services	2,132	3,658	5,511	7,469	5.5%	4.2%	3.4%	36.7%
TOTAL	9,859	13,999	17,420	20,361	3.6%	2.2%	1.7%	100.0%

Source: Bureau of Economic Analysis

**Average Annual Pay - FIRE**

<b>1997</b>	28761
<b>1998</b>	30085
<b>1999</b>	31070
<b>2000</b>	32664

Source: BLS

## Depository Institutions - Number of Establishments

<b>1997</b>	12
<b>1998</b>	12
<b>1999</b>	13
<b>2000</b>	13

Source: BLS

⇒ BLS reported 19 Real Estate Establishments in 2000.

**Comparison to US**

North American Industrial Classification System (NAICS) is the new system for classifying industries. The following table is information for 1999. The new categories, such as "Information", are part of the changes.

1999 County Business Patterns	Employment - Addison County	Addison County - Percent of Total Employment
Information	101	0.9%
Publishing industries	60	0.6%
Motion picture & sound recording industries	Na	0.0%
Broadcasting & telecommunications	Na	0.0%
Information & data processing services	Na	0.0%
Finance & insurance	274	2.5%
Credit intermediation & related activities	141	1.3%
Security, commodity contracts & like activity	10	0.1%
Insurance carriers & related activities	123	1.1%
Real estate & rental & leasing	72	0.7%
Real estate	Na	0.0%
Rental & leasing services	Na	0.0%
Professional, scientific & technical services	333	3.1%
Professional, scientific & technical services	333	3.1%
Management of companies & enterprises	Na	0.0%
Management of companies & enterprises	Na	0.0%

Source: US Census Bureau na=not disclosed

In contrast, the US as a whole has about 5.4% of total employment and 1.7% of total employment in Finance and Real Estate. This is one indicator that the region is a net importer of these types of services.

### **Wages - VT Department of Employment and Training**

Industry Title	Number of Employing Units	Employment	Total Wages	Average Wage
<b>ADDISON county</b>	<b>1,246</b>	<b>13,726</b>	<b>\$ 370,795,136</b>	<b>\$ 27,015</b>
<b>Private total</b>	<b>1,132</b>	<b>11,748</b>	<b>\$ 320,540,038</b>	<b>\$ 27,284</b>
<b>H. Finance, Insurance &amp; Real Estate</b>	<b>57</b>	<b>386</b>	<b>\$ 12,619,000</b>	<b>\$ 32,664</b>
<b>60. Depository Institutions</b>	<b>13</b>	<b>140</b>	<b>\$ 4,070,259</b>	<b>\$ 29,091</b>
<b>61. Nondepository Institutions</b>	Not publishable but included in subtotals			
<b>62. Security &amp; Commodity Brokers</b>	Not publishable but included in subtotals			
<b>63. Insurance Carriers</b>	Not publishable but included in subtotals			
<b>64. Insurance Agents &amp; Brokers</b>	<b>14</b>	<b>59</b>	<b>\$ 1,559,912</b>	<b>\$ 26,627</b>
<b>65. Real Estate</b>	<b>18</b>	<b>36</b>	<b>\$ 646,522</b>	<b>\$ 17,835</b>
<b>67. Holding &amp; Investment Offices</b>	Not publishable but included in subtotals			
<b>I. Services</b>	<b>413</b>	<b>4,308</b>	<b>\$ 120,928,111</b>	<b>\$ 28,072</b>
<b>73. Business Services</b>	<b>40</b>	<b>184</b>	<b>\$ 4,735,965</b>	<b>\$ 25,786</b>
<b>75. Auto Repair, Services &amp; Parking</b>	<b>26</b>	<b>77</b>	<b>\$ 1,637,635</b>	<b>\$ 21,291</b>
<b>81. Legal Services</b>	<b>18</b>	<b>87</b>	<b>\$ 3,178,269</b>	<b>\$ 36,427</b>
<b>86. Membership Organizations</b>	<b>9</b>	<b>55</b>	<b>\$ 610,375</b>	<b>\$ 11,048</b>
<b>87. Engineering &amp; Management Srvcs</b>	<b>52</b>	<b>177</b>	<b>\$ 6,062,984</b>	<b>\$ 34,190</b>

### **Occupational Projections**

The following table contains occupational projections for the "non-metropolitan" part of Vermont, which is essential anything outside of the Burlington area.

Sales Agents for Commodities, Paralegals, and Computer related professions are showing strong prospects for growth.

Job Title	1998 Empl.	2008 Empl.	Annual Growth Rate (compound avg)	Average Wage (OES survey)
NMA Total	219,249	240,577	0.9%	
<b>MANAGERIAL AND ADMINISTRATIVE</b>				
Education Administrators	1,028	1,129	0.9%	\$24.59
Managers - Administrative	292	304	0.4%	\$22.90
Managers - Communications/Transportation/Utilities Operations	233	263	1.2%	\$25.95
Managers - Construction	229	242	0.6%	\$25.19
Managers - Engineering/Mathematical/Natural Sciences/EDP	405	493	2.0%	\$28.23
Managers - Financial/Treasurers/Controllers	785	863	1.0%	\$25.05
Managers - Food Service & Lodging	1,054	1,075	0.2%	\$15.84
Managers - General & Top Executives	2,610	2,906	1.1%	\$28.61
Managers - Industrial Production	368	349	-0.5%	\$26.70
Managers - Marketing/Advertising/Public Relations/Sales	361	395	0.9%	\$25.05
Managers - Medicine & Health Services	437	533	2.0%	\$24.79
Managers - Personnel/Training/Labor Relations	184	196	0.6%	\$26.82
Managers - Property & Real Estate	628	648	0.3%	\$13.98
Managers - Purchasing/Merchandise	140	149	0.6%	\$21.66
Managers & Administrators- All Other	2,094	2,008	-0.4%	\$23.50
Postmasters & Mail Superintendents	155	174	1.2%	\$20.87
<b>PROFESSIONAL, PARAPROFESSIONAL, AND TECHNICAL</b>				
Accountants & Auditors	1,461	1,665	1.3%	\$17.70
Analysts - Management	484	699	3.7%	\$20.49
Announcers - Radio & Television	133	134	0.1%	\$7.97
Artists & Related Workers	480	499	0.4%	\$16.02
Buyers - Wholesale/Retail (exc Farm Products)	320	312	-0.3%	\$13.32
Buyers/Purchasing Agents - Farm Products	123	127	0.3%	\$14.11
Clergy	424	470	1.0%	\$21.20
Computer Data Base Administrators	112	158	3.5%	\$18.89

Computer Engineers	239	371	4.5%	\$25.39
Computer Programmers	475	508	0.7%	\$18.36
Computer Support Specialists	393	609	4.5%	\$15.74
Computer Systems Analysts - Electronic Data Processing	517	844	5.0%	\$21.58
Economists & Market Research Analysts	131	136	0.4%	\$23.61
Engineering Technicians & Technologists - Civil	190	225	1.7%	\$15.74
Engineering Technicians & Technologists - Electrical/Electronic	213	205	-0.4%	\$16.71
Engineering Technicians & Technologists - Mechanical	109	118	0.8%	\$17.96
Engineers - All Other	169	171	0.1%	\$23.97
Engineers - Civil/Traffic	412	493	1.8%	NA
Engineers - Electrical & Electronic (exc Computer Engineers)	352	330	-0.6%	\$24.28
Engineers - Industrial (exc Safety)	146	148	0.1%	\$23.66
Engineers - Mechanical	347	472	3.1%	\$23.34
Inspectors - Construction & Building	110	117	0.6%	\$11.14
Lawyers/Attorneys/Legal Counselors	1,549	1,716	1.0%	\$23.66
Librarians - Professional	314	308	-0.2%	\$16.08
Library - Technical Assistants	215	260	1.9%	\$9.81
Loan Officers & Counselors	314	379	1.9%	\$19.31
Management Support Workers- All Other	622	653	0.5%	\$19.25
Paralegal Personnel	198	307	4.5%	\$13.15
Personnel/Training/Labor Relations Specialists	838	941	1.2%	\$17.20
Planners - Urban & Regional	163	176	0.8%	\$18.24
Public Relations Specialists/Publicity Writers/Lobbyists	499	604	1.9%	\$16.21
Underwriters	107	79	-3.0%	\$15.61
<b>SALES AND RELATED</b>				
Insurance - Sales Agents	900	894	-0.1%	\$14.42
Real Estate - Brokers	201	186	-0.8%	\$19.71
Real Estate - Sales Agents	408	394	-0.4%	\$19.15
Sales Agents - Advertising	305	388	2.4%	\$13.20
Sales Agents - Business Services	429	574	3.0%	\$15.28
Sales Agents - Securities/Commodities/Financial Services	393	686	5.7%	\$36.26

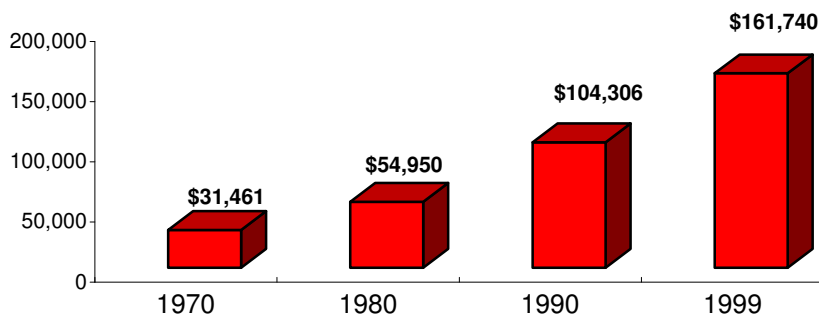
Source: VT DET

**Services**

This division includes establishments primarily engaged in providing a wide variety of services for individuals, business and government establishments, and other organizations. Hotels and other lodging places; establishments providing personal, business, repair, and amusement services; health, legal, engineering, and other professional services; educational institutions; membership organizations, and other miscellaneous services, are included.

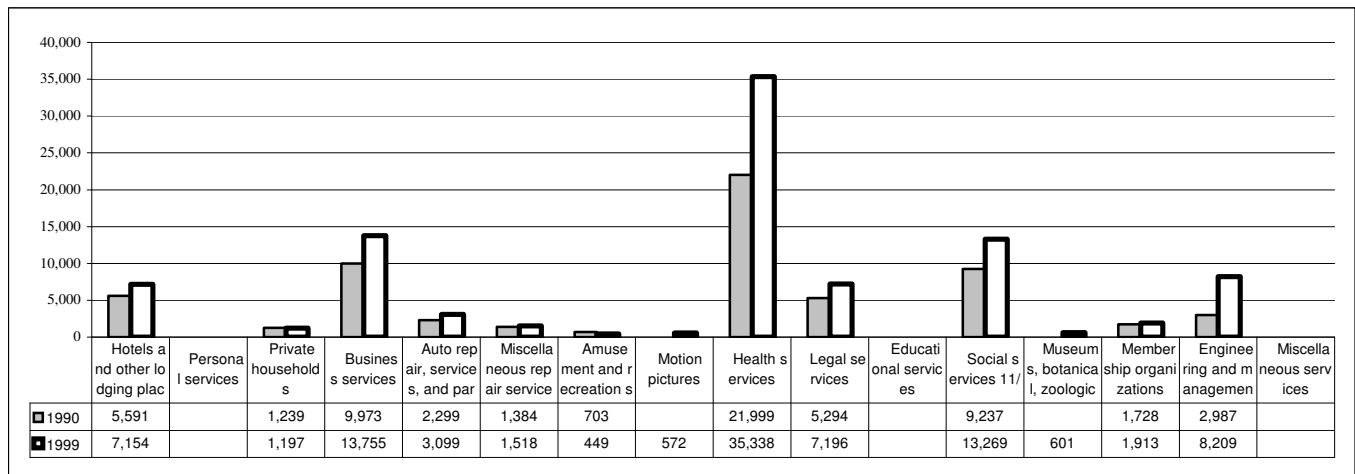
Establishments which provide specialized services closely allied to activities covered in other divisions are classified in such divisions.

**Services - Thousands of 1996 \$**



Earnings in the services sector have increased over the past thirty years. In 1999, the Health and Social Services Sectors' earnings constituted over 30% of the total earnings for the services sector.

**Earnings in Services by Detailed Industry - Thousand of 1996 \$**



Source: US Bureau of Labor Statistics \*blanks indicate no data for confidentiality.

- ⇒ Earnings in the Health Sector increased by 60 % between 1990 and 1999 and earning in the Social Services Sector increased by 40% over the same time period.

**Earnings Per Capita - 1999 \$**

Area name	Population - 2000	Health Services	Earnings Per Capita	Social Services	Earnings Per Capita
Vermont total	608,827	1,037,503	\$1.70	126,738	\$0.21
Addison	35,974	37,006	\$1.03	13,895	\$0.39
Bennington	36,994	74,190	\$2.01	10,463	\$0.28
Caledonia	29,702	34,550	\$1.16	3,908	\$0.13
Chittenden	146,571	416,132	\$2.84	32,543	\$0.22
Essex	6,459	na	na	339	\$0.05
Franklin	45,417	47,926	\$1.06	3,639	\$0.08
Grand Isle	6,901	na	na	501	\$0.07
Lamoille	23,233	32,190	\$1.39	4,021	\$0.17
Orange	28,226	23,838	\$0.84	7,575	\$0.27
Orleans	26,277	34,605	\$1.32	3,249	\$0.12
Rutland	63,400	103,773	\$1.64	12,166	\$0.19
Washington	58,039	96,627	\$1.66	15,483	\$0.27
Windham	44,216	70,240	\$1.59	9,358	\$0.21
Windsor	57,418	63,611	\$1.11	9,598	\$0.17

Source: BEA

- ⇒ Earnings per capita shows what is being earned in the private sector per capita. This is a rough measure of consumption of those services at the county level.
- ⇒ In the health services sector, Addison County earnings are only higher than earnings in Orange County on a per capita basis.

**Employment**

The Bureau of Labor Statistics provides data on employment at the 3-digit sic code level. Hospital employment was not disclosed, but is included in the total for "health services".

Health Services		Offices & Clinics of Medical Doctors	Offices and Clinics of Dentists	Offices of Other Health Practitioners	Nursing and Personal Care Facilities	Nursing and personal care, nec
<b>1997</b>	845	132	51	35	208	39
<b>1998</b>	866	140	49	40	216	38
<b>1999</b>	889	148	52	46	223	41
<b>2000</b>	948	170	55	55	227	45

Source: BLS

- ⇒ Health Services employment increased by 12% over the 1997-1999 period.

⇒ The only sub-sector in which there is limited growth is for dentists. Projections by BLS call for a continuation of this trend.

	Social Services	Individual and Family Services	Child Day Care Services
<b>1997</b>	625	391	70
<b>1998</b>	643	420	70
<b>1999</b>	666	405	81
<b>2000</b>	689	407	93

Source: BLS

⇒ Private social services employment increased by 10% over the 1997-1999 period.

## Wages

### Employment and Wages: 2000

Industry Title	Number of Employing Units	Employment	Total Wages	Average Wage
<b>I. Services</b>	<b>413</b>	<b>4,308</b>	<b>\$ 120,928,111</b>	<b>\$ 28,072</b>
70. Hotels & Other Lodging Places	23	368	\$ 5,798,147	\$ 15,738
72. Personal Services	21	73	\$ 1,012,271	\$ 13,962
73. Business Services	40	184	\$ 4,735,965	\$ 25,786
75. Auto Repair, Services & Parking	26	77	\$ 1,637,635	\$ 21,291
76. Miscellaneous Repair Services	9	20	\$ 491,351	\$ 24,264
78. Motion Pictures	8	55	\$ 466,825	\$ 8,475
79. Amusement & Recreation Services	4	37	\$ 324,314	\$ 8,805
80. Health Services	64	948	\$ 25,891,295	\$ 27,324
81. Legal Services	18	87	\$ 3,178,269	\$ 36,427
82. Educational Services	Not publishable but included in subtotals			
83. Social Services	37	689	\$ 13,459,549	\$ 19,525
84. Museums	3	41	\$ 724,798	\$ 17,571
86. Membership Organizations	9	55	\$ 610,375	\$ 11,048
87. Engineering & Management Svcs	52	177	\$ 6,062,984	\$ 34,190
88. Private Households	85	147	\$ 1,576,197	\$ 10,729

Source: Vermont Department of Employment and Training

⇒ The average annual wage in health services is slightly less than that for all services. Legal, private educational and engineering services provide higher average wages.

⇒ Social services substantially lower, providing an average annual wage in 2000 of \$19,525.

- ⇒ Health Services provided 21% of total wages and 15% of total employment to the Services sector as a whole.
- ⇒ The Social Services sector provided 11% of the total wages and 8% of total employment

## Projections

The following occupational projections call for growth in employment across the health and human services spectrum of occupations over the next eight years.

### **Occupational Projections 1998-2008, Non Metropolitan Area of Vermont**

Occupation Title	1998 Empl.	2008 Empl.	Annual Growth Rate (compound avg)	Annual Job Openings (due to growth and net replacement)	Average Wage (OES survey)
<b>MANAGERIAL AND ADMINISTRATIVE</b>					
Managers - Medicine & Health Services	437	533	2.0%	18	\$24.79
<b>PROFESSIONAL, PARAPROFESSIONAL, AND TECHNICAL</b>					
Dental Hygienists	279	399	3.6%	18	\$20.25
Dentists (DMD/DDS)	195	191	-0.2%	4	\$35.90
Health Professionals/Paraprofessionals/Technicians- All Other	223	263	1.7%	10	\$16.17
Human Services Workers/Case Aides	1,657	2,439	3.9%	121	\$10.68
Nurses - Licensed Practical (LPN)	1,093	1,329	2.0%	47	\$12.42
Nurses - Registered (RN)	3,152	3,839	2.0%	121	\$17.99
Pharmacists	196	229	1.6%	8	\$30.74
Physicians & Surgeons (MD)	924	1,082	1.6%	30	\$42.94
Physician's Assistants (PA)	157	234	4.1%	11	\$32.86
Psychologists	498	612	2.1%	20	\$16.31
Radiologic Technologists & Technicians	183	208	1.3%	6	\$15.00
Social Workers (exc Medical & Psychiatric)	849	1,070	2.3%	33	\$14.97
Social Workers -Medical & Psychiatric	432	551	2.5%	18	\$17.08
Technicians - Emergency Medical (EMT)	206	276	3.0%	12	\$8.54
Technicians - Psychiatric	369	355	-0.4%	5	\$11.76
Therapists - Physical	214	282	2.8%	10	\$22.95
Therapists - Recreational	105	118	1.2%	3	\$15.04
Veterinarians (DVM/VMD) & Veterinary Inspectors	181	239	2.8%	10	\$21.14
Veterinary Technicians & Technologists	110	134	2.0%	5	\$8.66
<b>CLERICAL AND ADMINISTRATIVE SUPPORT</b>					
Dispatchers - exc Police/Fire/Ambulance	199	237	1.8%	7	\$12.59
Dispatchers - Police/Fire/Ambulance	247	227	-0.8%	4	\$11.91
Welfare Eligibility Interviewers/Workers	235	198	-1.7%	5	NA

<b>SERVICE</b>	<b>1998 Empl.</b>	<b>2008 Empl.</b>	<b>Annual Growth Rate</b> (compound to avg)	<b>Annual Job Openings</b> (due to growth and net replacement)	<b>Average Wage</b> (OES survey)
Aides - Home Health	1,066	1,353	2.4%	44	\$7.76
Aides - Nursing/Orderlies/Attendants (CNA)	2,128	2,808	2.8%	98	\$8.36
Aides - Personal/Home Care	407	544	2.9%	25	\$7.35
Aides - Psychiatric	290	318	0.9%	7	\$8.58
Assistants - Dental	385	559	3.8%	23	\$12.03
Assistants - Medical	217	311	3.7%	14	\$11.86
Child Care Workers	2,161	2,824	2.7%	87	\$7.38
Child Care Workers - Private Household	463	471	0.2%	22	NA

Source: Bureau of Labor Statistics

- ⇒ The occupation with the greatest projected growth is physician's assistant and dental hygienists and assistants.