Rural Research Report

The Rural Midwest: How Is It Faring?

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The Midwestern economy has received a lot of attention during the past four decades due to a significant demographic and economic transition. The region experienced setbacks as older, routine manufacturing businesses moved to Mexico or overseas in search of lower costs (Longworth 2008, Walzer 2003). Elderly residents seeking more temperate climates, combined with declining birth rates among younger families (Longman 2004), caused the population growth in the Midwest to lag behind other parts of the country such as the South and Southwest (Hill, Bergstrom, Cordell, and Bowker 2009; Stewart 2000). The relative lack of employment opportunities precipitated an exodus of young adults and, combined with the continued mechanization of agriculture, meant fewer people were employed.

The Midwest's demographic transformation has resulted in an aging population with higher concentrations of the elderly, who may require additional services in the near future, and with fewer businesses and young workers to drive economic growth. In some instances, the absolute population declines in the rural counties[1] would have been larger and more prevalent without immigration, especially by Hispanics (Berube 2001, Kandel and Newman 2004). Growth in numbers of immigrants, however, may increase the need for supplemental education and social services to help bring them into the economic mainstream, thus equipping them to participate more effectively in the labor force.

Illinois did not escape these trends and, by some measures, was outperformed by neighboring states during the 1990s (Walzer, Gruidl, and Sutton 2002). For instance, rural counties in Illinois declined 2.3 percent in manufacturing employment during the 1990s compared with an average increase of 10.9 percent in Indiana, Iowa, Kentucky, Missouri, and Wisconsin. During the same period, wholesale and retail trade employment in rural Illinois declined 25.3 percent compared with 26.2 percent in adjacent states. Employment in services increased 23.7 percent in Illinois, nearly the same as the 23.8 percent in surrounding states.

The performance by rural Illinois counties in the 1990s in comparison with the surrounding states is important for several reasons. First, the significant employment declines in manufacturing were especially troublesome because manufacturing typically pays higher wages than other industries. Second, manufacturing businesses benefit from clustering with suppliers or related businesses in the same industry. To the extent that the clusters are weakened, the region may be less attractive to businesses in the future. Third, the losses in manufacturing employment can limit the potential for rural areas to attract or retain working-age residents because the lack of high-paying employment jobs equates to less income to circulate throughout the community.

Whether these population and employment trends continued into the 2000s and how Illinois fared compared with surrounding states as a Midwestern region is the subject of this report. Do the current high unemployment rates in rural Illinois simply reflect the Midwestern economy overall, or has Illinois continued to lag behind contiguous states? We make two main comparisons. First, the Midwestern states (Illinois and contiguous states) are compared with metro and rural counties across the U.S. Second, Illinois is compared specifically with the surrounding states in terms of population and employment. The discussion then turns to assets or opportunities for future development in rural Illinois. Hopefully, these comparisons will inform strategies to help revitalize local economies.

Population Trends

Between 2000 and 2010, population gains in Illinois were half of those in the surrounding states and one-third compared with gains in the U.S. (Table 1). Possible reasons for the lagging performance in both Illinois and the Midwest were identified in the previous section. Of greater concern is the fact that rural counties in Illinois declined while all county types in the surrounding states and nationwide increased. Only the metro counties in Illinois increased on average in population, while population increases in the surrounding states and the U.S. surpassed Illinois by double or more. These trends are disturbing for Illinois and confirm that the adverse trends for rural counties in the 1990s have not reversed.

Closer examination of population changes by age cohort is also informative. The population younger than age 17 statewide and across all types of Illinois counties declined. In surrounding states and nationwide, declines occurred in rural counties. Declines in the rural areas of Illinois were more than double compared with surrounding states and nearly four times greater than in rural populations nationwide. The implications of the decline in youth are clear. Educational institutions, especially in rural Illinois, will have smaller class sizes, which will increase pressures to reorganize and/or consolidate. There are also long-term implications for future workforces in rural areas and their ability to attract businesses and industries or at least labor-intensive industries.

Compounding the trends in youth population is that the age 18 to 44 cohort declined statewide in Illinois and in each county group. Declines in surrounding states in this age cohort were approximately half of those in Illinois and nationwide, while the decline in rural counties nationwide was significantly less than in Illinois (-2.5% for U.S. vs. -12.5% in Illinois). The metro counties in the surrounding states and nationwide gained in population for this cohort.

The age 65 to 84 cohort declined in rural Illinois counties, while metro counties had a slight increase. Population gains were experienced in all types of counties in adjacent states. The nationwide rural population gains were more than twice the gains in the states surrounding Illinois.

Table 1. Population Change by Age Group, 2000-2010

	Percent Change 2000-2010								
	Illinois			Surrounding States: Indiana, Iowa, Kentucky, Missouri, and Wisconsin			United States		
Age Group	Nonmetro & Micro	Metro	State	Nonmetro & Micro	Metro	Region	Nonmetro & Micro	Metro	Total U.S.
0-17 Years	-11.5%	-2.5%	-3.6%	-4.8%	2.8%	0.4%	-3.1%	3.6%	2.5%
18-44	-12.5	-1.8	-3.2	-6.7	1.1	-1.2	-2.5	4.0	3.0
45-64	11.6	23.0	21.2	20.8	27.4	25.2	23.6	27.8	27.0
65-84	-0.9	5.9	4.7	5.4	8.6	7.4	11.1	11.2	11.2
85+	4.9	24.9	20.4	7.9	22.2	16.7	15.7	29.3	26.3
Total Population	-4.5	4.4	3.2	2.1	8.4	6.4	5.6	10.2	9.4

Sources: U.S. Census Bureau 2000, 2010; EASI Analytics, Inc. 2011

Employment Trends

People choose a residence partly based on employment opportunities. Thus, areas with strong industry growth, especially those with opportunities for higher pay, can attract more residents. For this reason, employment trends in six main economic sectors were examined in order to compare rural Illinois with other Midwestern states and the nation (Table 2).

Between 2000 and 2010, rural counties in Illinois lost 6.7 percent of their employment compared with a decline of 2.5 percent in the surrounding states and a gain of 2.3 percent nationwide. Illinois counties statewide had a reduction in total employment of 1.5 percent, which is five times that of surrounding states, while U.S. employment experienced a gain of 5.3 percent. The recent recession affects these comparisons, and an economic recovery could potentially bring about a rebound, although these areas may not return to the pre-recession levels in the near term. The employment declines do not necessarily mean that companies have closed; rather, in some instances, they

Table 2. Industry Employment Change, 2000-2010

Industry	Illinois			Surrounding States: Indiana, Iowa, Kentucky, Missouri, and Wisconsin			United States		
	Nonmetro & Micro	Metro*	State	Nonmetro & Micro	Metro*	Region	Nonmetro & Micro	Metro*	Nation
Total Employment									
Percent Change	-6.7	-0.8	-1.5	-2.5	0.6	-0.3	2.3	5.8	5.3
Farming									
Percent Change	-25.1	-22.5	-24.1	-19.7	-19.1	-19.5	-14.7	-17.6	-16.1
Change in Share of Total Employment	-1.4	-0.1	-0.3	-1.5	-0.3	-0.7	-1.1	-0.2	-0.4
Manufacturing									
Percent Change	-35.3	-35.4	-35.4	-30.0	-30.4	-30.3	-30.5	-31.1	-31.0
Change in Share of Total Employment	-4.3	-4.1	-4.1	-5.1	-4.3	-4.5	-4.7	-3.5	-3.7
Wholesale and Retail Trade									
Percent Change	-6.4	-10.6	-10.1	-5.6	-8.1	-7.4	-3.2	-3.5	-3.5
Change in Share of Total Employment	0.1	-1.5	-1.3	-0.5	-1.3	-1.1	-0.8	-1.3	-1.2
Services									
Percent Change	2.9	12.7	11.8	14.4	15.2	15.0	18.1	19.1	19.0
Change in Share of Total Employment	3.1	5.4	5.2	4.8	5.2	5.2	4.6	4.9	4.9

* The U.S. Office of Management and Budget (2003) defines metropolitan areas. The definitions used for calculations in this report were released June 30, 2003.

Source: Woods & Poole Economics, Inc. 2012

have reduced employment short-term. Nevertheless, the employment trends help explain the adverse population trends described previously, especially when employment losses caused residents to leave for work elsewhere.

Agriculture and Related Industries. Agriculture has long been a solid employment base in many rural counties, but increased mechanization and farm sizes have reduced the employment in production agriculture. At the same time, however, the productivity of agricultural industries has increased, which means that support industries and/or processors have expanded, adding employment in both rural and metro communities where the products are manufactured.

Farming employment declined in Illinois by nearly 25 percent (Table 2). The share of workers employed in farming fell by 1.4 percent. Surrounding states and the nation experienced similar declines. This is likely the result of the long-term trends of farm consolidation and productivity gains rather than any other events in rural economies.

Examining the contributions to local economies from the perspective of earnings tells a different story (Table 3). In Illinois, earnings per employee in farming increased 141.0 percent during the past decade in rural counties, substantially more than the 95.7 percent in surrounding states and more than double the 58.8 percent nationwide. The earnings growth in Illinois could reflect differences in farm size, distribution of crops, and related factors not examined in this report. What is suggested, however, is that the farm economy, as measured by earnings, has prospered in Illinois to a larger extent than in other states, even in light of more significant declines in employment. Retaining and circulating these higher earnings in the rural economy provide opportunities for economic growth.

Manufacturing. Relatively speaking, what are the overall effects of the changes in manufacturing employment? The manufacturing sector in rural counties in Illinois experienced a 35.3 percent decline in employment, significantly higher than in the surrounding states (30.0%) and nationwide (30.5%). With respect to changes in manufacturing employment, the states contiguous to Illinois have a greater resemblance to the nation as a whole than does Illinois. Manufacturing as a share of total employment in rural Illinois counties fell by 4.3 percentage points, a smaller decline than in surrounding states and the U.S. However, manufacturing accounts for a smaller share of employment in rural Illinois than in the surrounding states or the nation.

So, what do these comparisons tell us? The Midwest was not more adversely affected in the 2000s than the nation in relative loss in the importance of manufacturing employment, but the declines still had a negative effect on the incomes in the affected counties. Of special note is that manufacturing industries in rural Illinois counties had industry earnings per employee of $39,470 in 2000 compared with an average of $41,776 (constant dollars) in 2010 (5.8% increase). Illinois manufacturing industry earnings per employee continued to lag behind the surrounding states and the U.S. for rural areas. The manufacturing industry earnings per employee in Illinois were nearly 27 percent below the earnings in surrounding states or the U.S. in 2010. The rate of earnings growth between 2000 and 2010 also lagged behind the region and the nation (Table 3).

Table 3. Percent Change in Industry Earnings per Employee, 2000-2010*

	Illinois			Surrounding States: Indiana, Iowa, Kentucky, Missouri, and Wisconsin			United States		
Industry	Nonmetro & Micro	Metro*	State	Nonmetro & Micro	Metro*	Region	Nonmetro & Micro	Metro*	Nation
Farming									
2000	$19,465	$20,538	$19,868	$13,657	$13,592	$13,634	$18,279	$19,281	$18,750
2010	$46,917	$55,916	$50,368	$26,732	$21,787	$24,983	$29,024	$25,045	$25,073
Percent Change	141.0	172.3	153.5	95.7	60.3	83.2	58.8	29.9	33.7
Manufacturing									
2000	$39,470	$42,877	$43,108	$43,517	$58,607	$53,506	$42,247	$62,645	$58,457
2010	$41,776	$45,016	$46,078	$46,149	$64,606	$58,387	$45,867	$67,440	$62,978
Percent Change	5.8	5.0	6.9	6.0	10.2	9.1	8.6	7.7	7.7
Wholesale and Retail Trade									
2000	$22,574	$24,536	$24,690	$24,443	$33,610	$31,145	$30,030	$38,655	$36,575
2010	$26,393	$25,840	$27,924	$25,380	$34,882	$32,277	$33,318	$38,749	$36,898
Percent Change	16.9	5.3	13.1	3.8	3.8	3.6	10.9	0.2	0.9
Services									
2000	$20,807	$23,195	$22,771	$23,297	$34,029	$31,543	$26,605	$39,970	$38,127
2010	$22,587	$24,312	$24,720	$24,966	$36,362	$33,736	$28,488	$41,198	$39,388
Percent Change	8.6	4.8	8.6	7.2	6.9	7.0	7.1	3.1	3.3

*Figures are in constant (2005) dollars.

** The U.S. Office of Management and Budget (2003) defines micropolitan areas. The definitions used for calculations in this report were released June 30, 2003.

Source: Woods & Poole Economics, Inc. 2012

Wholesale and Retail Trade. Rural counties in Illinois did not fare much better in retail and wholesale trade employment and declined 6.4 percent in employment compared with a decline of 5.6 percent in surrounding states (Table 2). Metro counties and the state of Illinois had similar experiences with declines of 10.6 and 10.1 percent, respectively.

Unfortunately, the employment losses in Illinois were larger than those in the surrounding states and the nation. These trends are consistent with the population declines described earlier since retail trade, especially, is often linked to the number of residents in the area. Essentially, rural counties in Illinois lost employment in these two relatively large industries during this period. The higher wages paid in manufacturing are linked to local markets for goods and services, which partially explains the adverse trends in the trade sectors.

Somewhat encouraging, however, are the increases in earnings per rural Illinois employee in wholesale and retail trade. Specifically, the average earnings of $22,574 in 2000 increased to $26,393 in 2010 (16.9%), compared with increases of 3.8 and 10.9 percent in the surrounding states and the nation, respectively (Table 3). This is good news for rural Illinois and could suggest that the pending economic recovery will benefit rural counties more in the future. However, a more detailed inspection of changes in the number of stores and related activities is needed before more definite statements can be made.

Services. Employment shifts from manufacturing to services have been underway for many years and are well-documented (Bryson and Daniels 2010, Gershuny and Miles 1983). These trends continued into the 2000s (Table 2). However, counties in rural Illinois fared worse than the surrounding states and the nation. The gain of 2.9 percent in rural Illinois counties compares with an increase of 12.7 percent in metro counties. Rural counties in Illinois did not perform as well as those in the surrounding states, which experienced a 14.4 percent increase and an 18.1 percent gain in similar counties nationwide. Metropolitan counties in Illinois fared better than their rural counterparts, increasing by 12.7 percent. However, similar counties in surrounding states and the nation consistently outperformed them, growing by 15.2 and 19.1 percent, respectively.

The impact of a trade-off between manufacturing and service employment becomes clearer in a comparison of earnings. In 2010, manufacturing earnings per employee averaged $41,776 in rural Illinois counties, compared with an average of $22,587 in service industries. Services are especially difficult to analyze because they include business services (accounting, engineering, legal, etc.) and consumer services (fast-food, personal care, restaurants, etc.). The threshold sizes needed to support a business and other considerations require business services to locate in larger or metro counties, while consumer services exist everywhere but are more important in rural areas.

Employment in rural Illinois is becoming more dependent on service industries, increasing by 2.9 percentage points from 2000 to 2010. One implication is that as markets for businesses in rural areas continue to shrink, rural counties will be less attractive for prospective residents, causing consumer services to be more adversely affected.

Does the relatively poor economic performance of rural counties in Illinois compared to the surrounding states and the nation still suggest opportunities for revitalization? The answer is *yes* because changing conditions in national and global economies offer several possibilities to consider.

Capturing the Manufacturing Rebound. There is evidence that a growing middle class in China combined with rising wages may well make rural locations in the U.S. more competitive for manufacturing expansions (Henderson 2010, Slass 2011). This competitive advantage may also be fostered by higher fuel costs that make transporting final goods from offshore locations more expensive (Harrington 2011). Since, as noted earlier, manufacturing jobs usually pay higher wages, this is an opportunity for some rural regions in Illinois to pursue. Especially important, however, are advanced manufacturing jobs that pay well above the average of many other industries and for which the demand is currently unmet (Battelle Technology Partnership Practice 2011, U.S. Department of Commerce 1993).

Communities could consider investing in educational programs that produce graduates with the skills needed to work in these industries. At the same time, however, local development agencies must attract these industries and avoid exporting highly trained graduates. Special opportunities might arise for regional collaboration among rural communities and regional centers where well-trained graduates could work while still taking advantage of lower living costs in neighboring areas, even after adjusting for commuting costs.

Stimulating Local Entrepreneurship. Creating and expanding local businesses are two proven ways to revitalize rural areas as well as to retain graduates. Helping second stage businesses to expand often creates jobs quicker than starting businesses, but adding businesses is certainly something that rural areas should consider (Shane 2008). The Department of Commerce and Economic Opportunity (DCEO) has a variety of programs, including Small Business Development Centers, with services to help potential entrepreneurs start ventures. Many of these businesses, with additional support, can expand and add employment.

Current research by the Center for Governmental Studies at Northern Illinois University has identified targets for entrepreneurship training and support. These targets, based on an unpublished study of business starts in 850 counties in the Midwest, include females ages 25 to 34, owners of relatively small farms, Hispanic immigrants, pre-retirees (ages 55 to 64), and unemployed residents. Each group fits into a necessity or opportunity entrepreneur category and may have been overlooked in traditional entrepreneurship support programs.

Value-Added Agriculture. Increased attention has been paid to opportunities to process locally raised agriculture products and market them to large population centers. One recent example shows a substantial return from processing and selling pumpkin oil, which has become a highly priced item in the culinary field (Marcus 2011). Illinois raises the largest number of pumpkins of any state and could be a major supplier of this oil. Processing these products locally can generate employment and substantial incomes from relatively small acreages. Even if only as a sideline, it could bring income and employment into rural areas.

Also increasing in popularity are food hubs, which provide a certified common kitchen where producers can contract to have their produce processed and marketed to institutions such as hospitals, universities, prisons, and other agencies that now mandate that a specific portion of their food has to be obtained from local sources. This development approach offers healthier lifestyles as well as generates income for producers and others in the community. The Wisconsin Innovation Kitchen (**www.wi.innovationkitchen.org**) in Mineral Point, Wisconsin, and the Farm Market Kitchen Incubator (**www.farmmarketkitchen.com**) in Algoma, Wisconsin, are two places in the Midwest that have implemented this approach successfully. The Wisconsin Innovation Kitchen used a small, closed business building and employed residents with disabilities to process products raised by local producers. The initial capital costs were not substantial, and these operations provide local incomes. More of these types of operations are likely in the future as local development practitioners continue to search for innovative approaches.

On a larger scale, the expected expansion of bio-fuels and other products will definitely provide opportunities for further development in rural areas. Some of these products are raised in Illinois, and further research is likely to generate even more opportunities. Ethanol and related products brought substantial returns to rural residents in the past and are at least partially responsible for the relatively prosperous economic times recently experienced by farmers. Opportunities in the future will depend on both the price of gasoline and the price of corn or other inputs.

Building on Broadband. The state of Illinois has invested substantially in broadband facilities. In the next few years, many relatively remote areas could become attractive to business investors who can serve markets using the Internet. Rural locations offer lower operating costs as well as a less hectic environment. Attracting these businesses, however, will require active recruitment efforts that probably are best undertaken regionally. The idea of forming business clusters that involve both metro and rural locations is currently promoted by many federal agencies and, when linked with broadband opportunities, can help revitalize remote rural areas in Illinois.

Increasing Access to Business Finance. A commonly cited obstacle to business development, especially during the recent recession, is the inability of local entrepreneurs to finance business starts and/or expansions. In many instances, the traditional sources of equity investment, such as houses or other business assets, have decreased in value and no longer provide the collateral required for a business loan.

In response, there has been considerable interest in forming seed accelerators in which entrepreneurs with high potential are selected from an applicant pool and invited to participate in an incubator setting. This seed accelerator provides an initial injection of financial support followed by continued education and guidance regarding business operations. Participants are then offered an opportunity to market their business plans to angel investors and/or venture capitalists. While this approach is well-suited to certain types of businesses in metropolitan areas, it nevertheless offers a paradigm that could be adapted to other business opportunities on a smaller scale in rural areas. State government agencies support these types of activities in some instances.

During the recent recession, rural Illinois has suffered more than the adjacent states, and the financial condition of local and state governments makes matters worse because of delays or cutbacks in payments to local governments. While we see evidence that a recovery is underway, traditionally, Illinois tends to enter a recession later and to recover more slowly. Thus, rural areas may have some time to wait before employment rebounds to pre-recession levels. Nevertheless, local public officials must move ahead with concerted actions to revitalize their local economies.

Fortunately, Illinois has several agencies specifically tasked with monitoring rural conditions and finding innovative solutions. Paramount among these organizations is the Governor's Rural Affairs Council (GRAC), which is celebrating its 25th anniversary in 2012. GRAC was started to help coordinate actions and policies by state agencies to strengthen rural economies. Chaired by Lt. Governor Sheila Simon, GRAC meets regularly with the representatives of state agencies charged with serving rural constituencies across the state. GRAC is identifying the needs of rural Illinois and is exploring innovative programs. The council does not duplicate other state departments; rather, it finds solutions that might not be pursued by traditional state agencies because these solutions cross the jurisdictional boundaries of several groups.

A second asset to rural areas is the Illinois Institute for Rural Affairs (IIRA), located at Western Illinois University. The mission of IIRA is to improve the quality of life in rural Illinois by partnering with public and private agencies on local development and enhancement projects. IIRA provides programs such as MAPPING the Future of Your Community, which helps local leaders to find a future for their communities and to create an action strategy to achieve local goals. This program works hand-in-hand with the Peace Corps Fellows program, which provides full-time local development practitioners to work with community leaders to implement their action plan.

IIRA also has an Illinois Value-Added Sustainability Development Center that focuses on new opportunities in value-added agriculture, bio-fuels, and related economic development activities especially suited to rural areas. Working together, GRAC and IIRA can help coordinate state agency services in rural Illinois. Collaborative efforts between GRAC and IIRA provide opportunities for rural leaders across Illinois to identify potential opportunities during the economic recovery and to design strategies in local and state governments to find new ventures to promote.

The bottom line, however, is that revitalization efforts must start locally with a clear vision of what a community or region wants. GRAC and IIRA can help community leaders find that vision and the strategies to implement it. State agencies can then collaborate to pursue those interests. An economic recovery is underway, and by combining rural resources with hard work and committed effort, rural Illinois can have a positive outlook for the future.

Endnote

[1] Rural counties are defined, for the purposes of this report, as those classified by the U.S. Census Bureau as either micropolitan or nonmetropolitan. Micropolitan counties are defined as those containing an urban population core of at least 10,000 (but less than 50,000).

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