



PUBLIC POLICY INSTITUTE

Collaborative transformation

INDIANA UNIVERSITY

SECTION 1

How is Avon doing?

Much of Avon is doing quite well

- Money Magazine – 17th best place to live
- Niche – 29/4976 best suburb to buy a house
- Fastest growing city in Indiana (15 – 50k) 2010 to 2016
- Nerdwallet – 5th best city for young families in Indiana

But -

- 3.8% live in poverty / 18.8% Latino
- 7.4% have no health insurance
- 226 unemployed
- 309 individuals 18-24 haven't graduated high school
- 191 over 25, less than 9th grade
- 426 over 25, more than 9th grade less than high school

SECTION 1

How is Indy region doing?

Places and people in the metro area are doing quite well

- Kiplinger – Top 10 place to start a business
- Livability – 3rd best downtown
- Forbes – top 10 places for young professionals and high tech job growth
- Money Magazine – Fishers best place to live in the US, Carmel #16, Avon #17, Greenwood #22
- Wall Street 24/7 – Hamilton county 13th best county to live in
- Forbes – 21st best place for Business and career

But others are struggling

- 80% increase in poverty in last decade
- 2016 poverty rates for msa
 - Latino 32.9%
 - Black 27.1%
 - Asian 13.4%
 - White 10.8%



But others are struggling

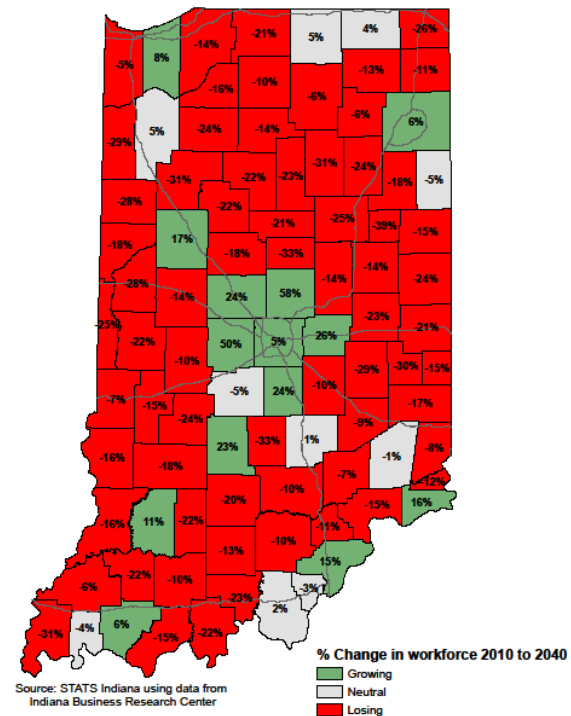
- 100,000 children in poverty
- 100,000 adults without HS diploma
- 250,000 at risk due to automation or globalization



Population / Workforce – losing ground to Amazon peers

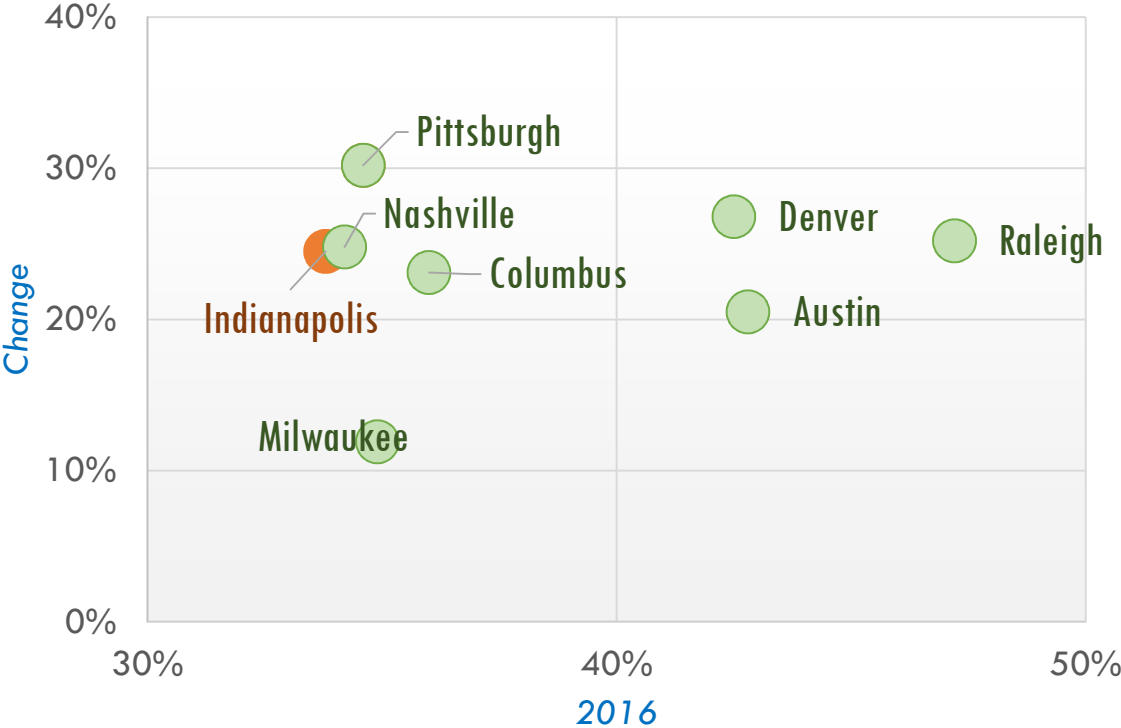
- **Change**
 - Doing well in Midwest
 - Slower than US
- 2011 – 2016 Population Change
 - Austin 15.5%
 - Raleigh 12.0%
 - Nashville 9.8%
 - Denver 9.7%
 - Columbus 6.0%
 - Indianapolis 4.9%
 - Milwaukee 1.6%
 - Pittsburgh -0.7%
- Low IN birth rate
- Declining birth rate
- Over dependence on IL, OH, MI

Estimated Changes in Age 25-64 Population
2010-2040



MSA WORKFORCE

- Not just slow growth but about talent
 - Lowest share BA+
 - 33.8%
 - Raleigh, Denver and Austin
 - All over 40%
- Increase 24.5% slower than all but
 - Milwaukee 11.9%
 - Austin 20.5%
 - Columbus 23.1%

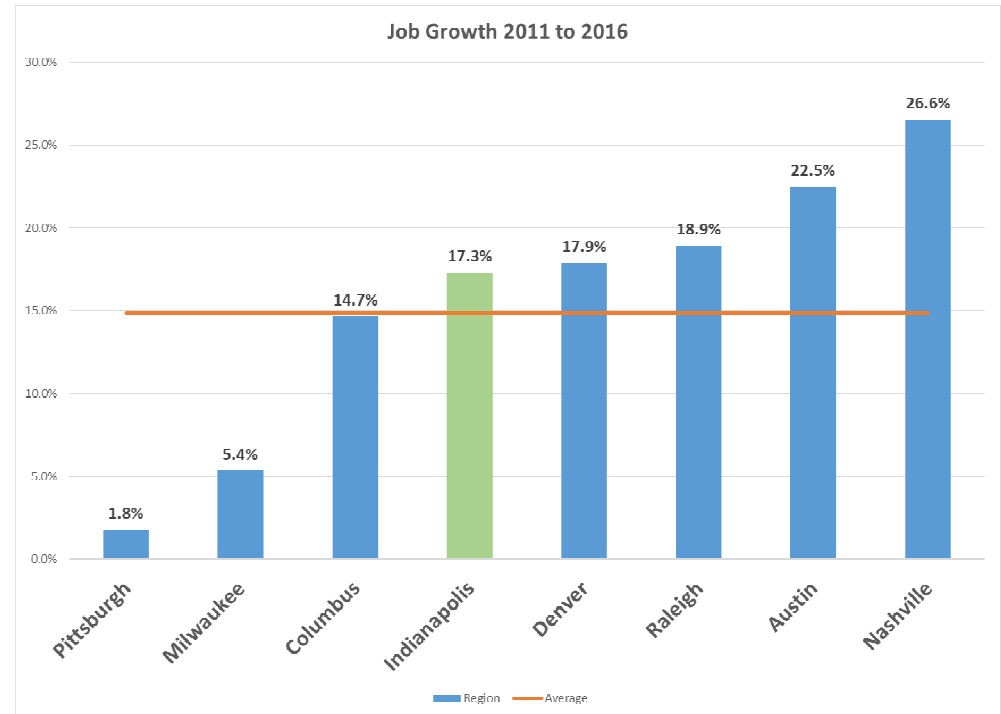


MSA Job Growth

Not Terrible

2015 to 2016 change and rankings

- Nashville 4.0%, 6th
- Austin 3.8%, 7rd
- Raleigh 3.7%, 10th
- Denver 2.6%, 37th
- Indy 2.5%, 40th
- Columbus 2.5%, 44th
- Milwaukee 0.8%, 87th
- Pittsburgh 0.1%, 95th

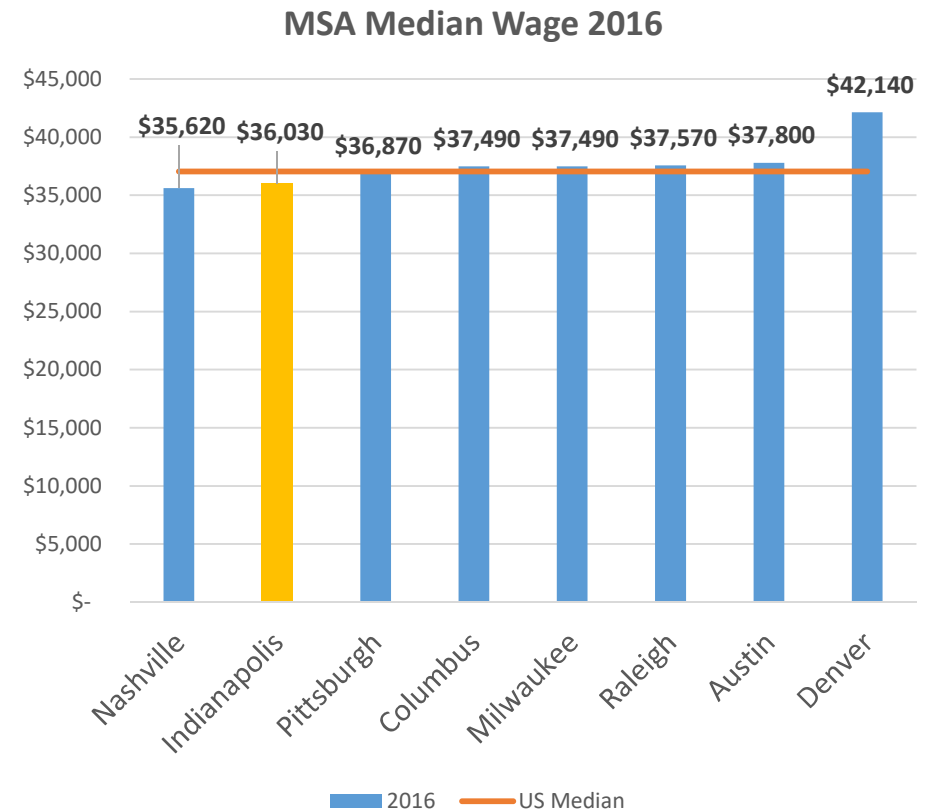


But wages are low and growth is slow

- Only Nashville is lower
- But their wages are growing twice as fast

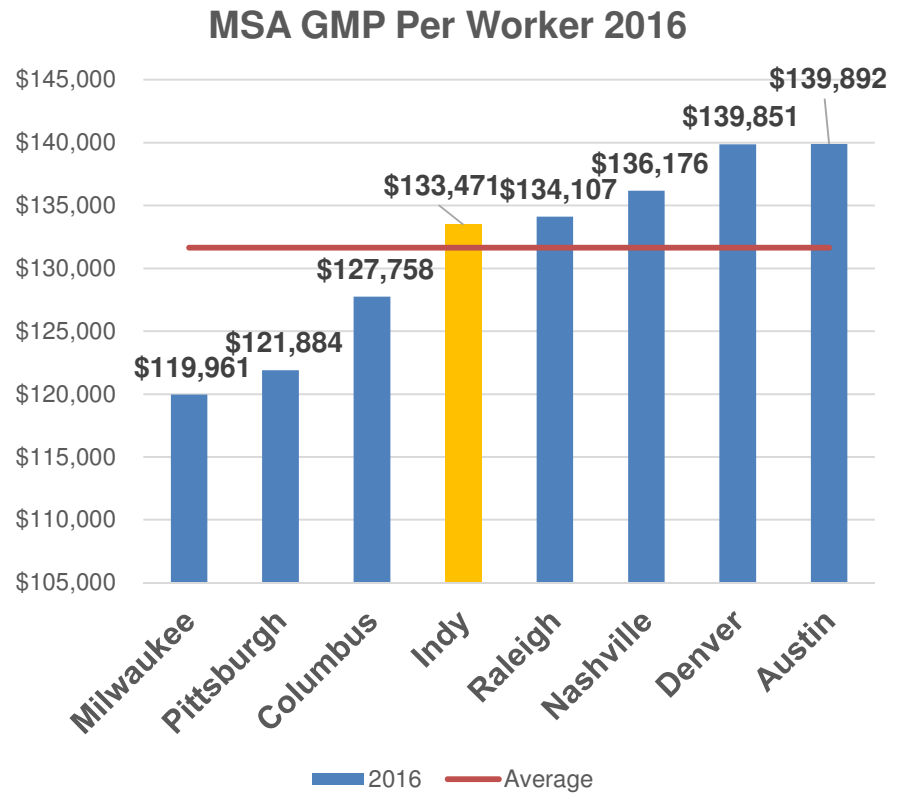
2006 to 2016 change and rankings

- Raleigh 13.0%, 4th
- Pittsburgh 12.0%, 7th
- Columbus 8.6%, 34th
- Denver 8.0%, 36th
- Nashville 7.7%, 40th
- Austin 7.3%, 43rd
- Milwaukee 4.6%, 75th
- Indy 3.6%, 85th



MSA PRODUCTIVITY

- Competitive, but growing most slowly
- Troubling
 - Why low wages when productivity is average?
- 2006 – 2016 Change in Total GMP
 - Pittsburgh +22.5%, 1st
 - Nashville 9.9%, 14th
 - Austin 8.4%, 21st
 - Columbus 6.3%, 34th
 - Denver 5.0%, 42nd
 - Milwaukee 3.6%, 52nd
 - Raleigh 3.6%, 53rd
 - Indianapolis +2.7%, 60th



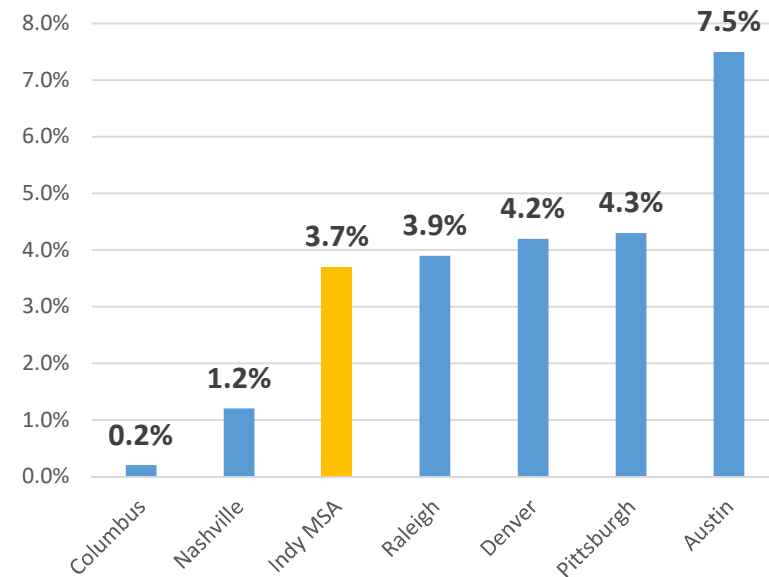
MSA Entrepreneurship

- Jobs at young firms (age 5)
- Low and losing ground
- Recent year a bit better

2006 to 2016 change and rankings

- Austin 36.0%, 1st
- Denver 5.0%, 5th
- Nashville -1.7%, 13th
- Raleigh -6.9%, 19th
- Columbus -7.4%, 21st
- Milwaukee -10.3%, 26th
- Indianapolis -17.9%, 53rd
- Pittsburgh -28.5%, 79th

MSA Job Growth at Young Firms 15-16

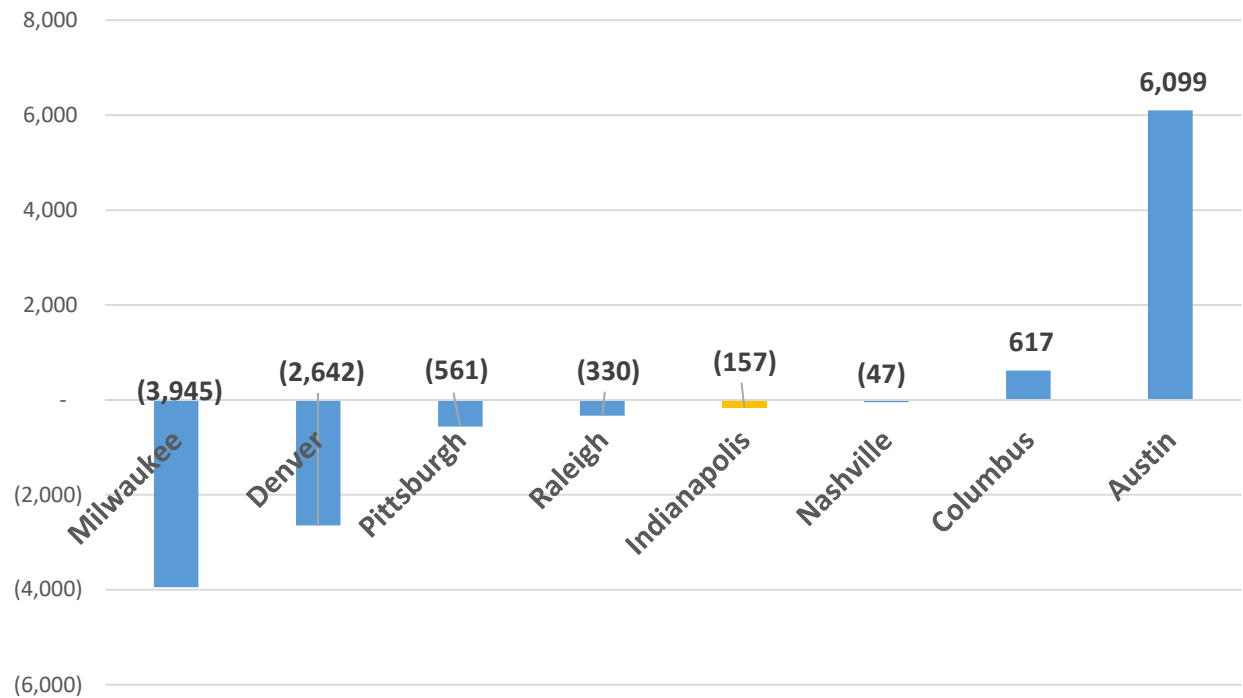


MSA Tech Cluster

- Total Jobs in cluster 2015

- Austin 22,869
- Pittsburgh 10,925
- Milwaukee 9,623
- Raleigh 9,509
- Denver 6,967
- Indianapolis 4,644
- Columbus 3,869
- Nashville 2,164

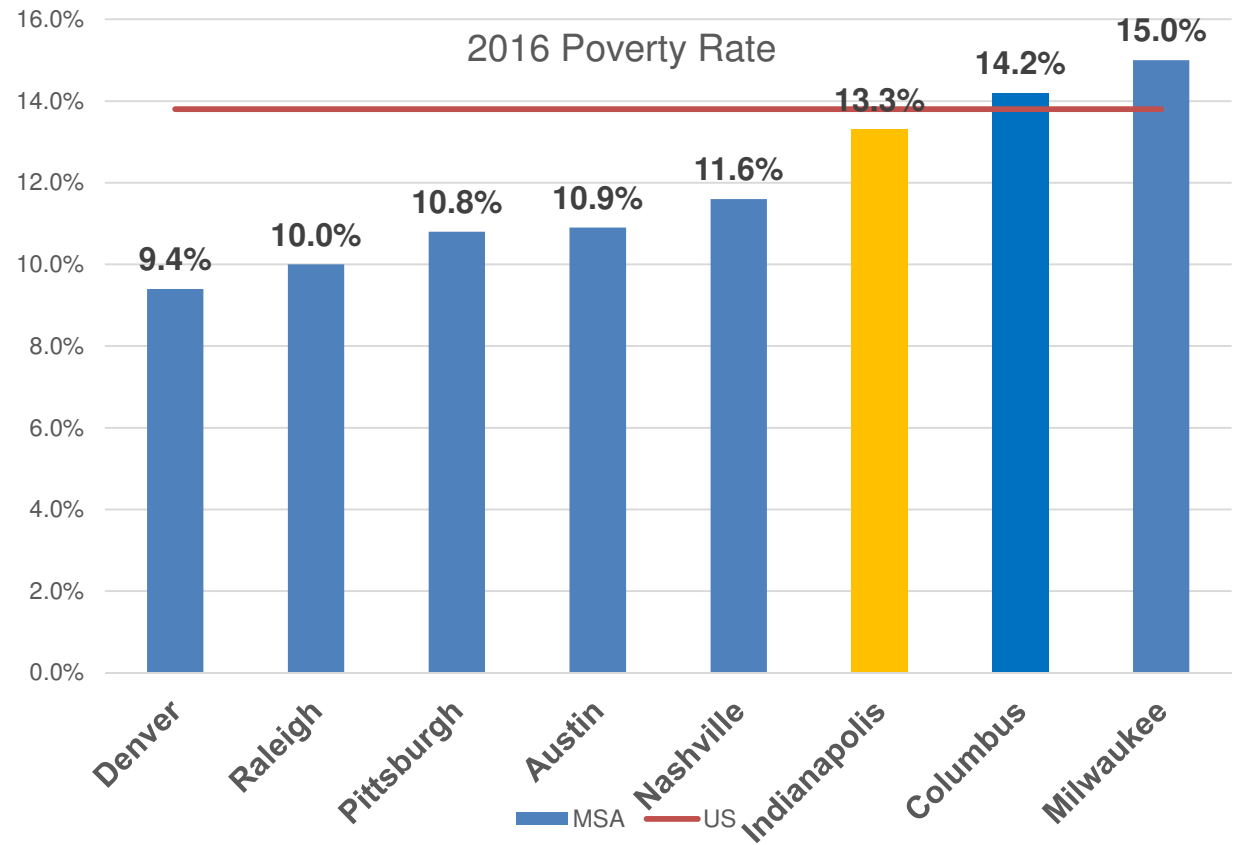
Information Technology/Analytical Instruments Cluster
Change in Jobs 2010 to 2015



Poverty in MSA

- High and growing fastest
 - From 2011 to 2016
 - Number of People

	Poverty	Not HS
Denver	-19.1%	0.7%
Austin	-17.4%	4.4%
Pittsburgh	-14.9%	-20.9%
Nashville	-8.6%	-1.0%
Raleigh	-8.6%	-14.0%
Columbus	0.9%	0.1%
Milwaukee	3.4%	8.3%
Indianapolis	6.3%	4.3%



The key challenge – recognize inter-dependencies and collaborate to change region's trajectory

- Transformative investment in regional assets and quality of life
 - 2 key ingredients
 - Improved collaboration
 - Sufficient investment



Discussion



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