

JULY 2020

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TARGET SECTOR ANALYSIS

EAST MICHIGAN COUNCIL OF GOVERNMENTS



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INTRODUCTION

The East Central Michigan region has a tremendous opportunity to build on its increasingly diverse economic base. Historically, the area has relied heavily on anchor companies, such as Dow and GM, to drive growth in its legacy sectors of **advanced manufacturing** and **food processing**. These key economic drivers have been strengthened through the growth of supporting activities like **professional services** and **higher education and research**. Fostering the growth of these activities, most notably the robust higher education cluster, will continue to advance the regional economy and develop the resiliency needed to withstand economic cycles.

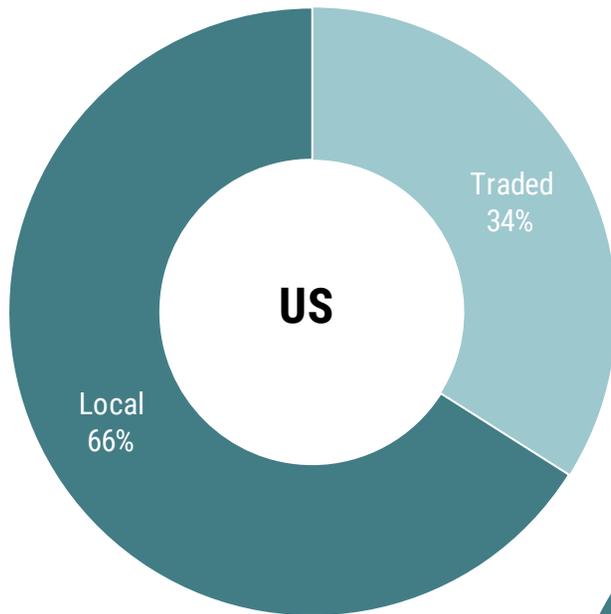
The region also features significant assets related to **healthcare** and **tourism/outdoor recreation**. In addition to their economic contribution, these sectors enhance the quality of place and provide desired amenities to area residents. Beyond its essential role in supporting the existing community, the healthcare system can also help draw talent and businesses to the region. Similarly, East Central Michigan's incredible natural resources and outdoor recreational opportunities attract tourists from all corners of the country.

As of the date of publication, economic upheaval associated with the COVID-19 pandemic has resulted in the loss of more than 40 million jobs nationwide. The impacts of this massive disruption have not begun to trickle through federal statistics. There is no timetable for a return to normalcy, nor any agreement as to what that might look like. Even with this uncertainty in mind, the six sectors and associated niches identified by this analysis remain the best potential for growth. They leverage some of the region's strongest assets and encompass a range of skills and education levels. They have a history of strong employment growth and they include goods and services likely to remain essential for the foreseeable future. By focusing on existing businesses in these sectors, as well as continuing to cultivate entrepreneurship and small business innovation, the consulting team is confident East Central Michigan can further expand on past successes.

EMPLOYMENT CLUSTERS

TRADED VS LOCAL

EMPLOYMENT IN 2019 BASED ON CLUSTER TYPE

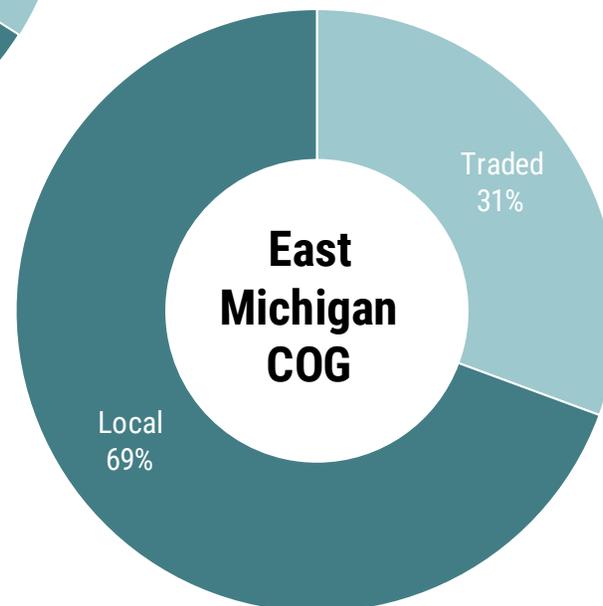


TRADED CLUSTERS

- Serve outside markets
- Free to choose where they locate
- Tend to be highly concentrated in a few regions that have specific advantage

LOCAL CLUSTERS

- Primarily serve local markets
- Present in virtually every market
- Location is not dependent upon competitive advantage



WHY IT MATTERS

Increasing the ratio of traded-to-local clusters is a common strategy for enhancing economic prosperity. “Traded” clusters are emphasized by economic developers because they include industries and firms that typically produce goods and services for customers beyond the local region. These traded activities are thus more likely to produce externally generated revenues which can, in turn, help boost local tax coffers. As an example, a dentist office might serve local customers exclusively, while a manufacturing plant, a data center, or a hotel would typically serve paying customers beyond the local area. The ability of traded clusters to serve larger markets also presents greater opportunity for employment growth, whereas a dentist office might face more finite geographic limits to expansion.

Sources: US Bureau of Labor Statistics; Emsi 2020.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies. Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi.

EMPLOYMENT CLUSTERS WEIGHT (SIZE & CONCENTRATION)

TRADED CLUSTERS EMPLOYING THE MOST WORKERS LOCALLY IN 2019

LOCATION QUOTIENTS

BELOW AVG ►  ◀ ABOVE AVG

	US		EAST MICHIGAN COG		
	% of nat'l employment		% of local employment		LQ
Automotive	0.6%		3.8%		5.90
Business Services	6.1%		3.5%		0.58
Education & Knowledge Creation	4.1%		3.5%		0.86
Plastics	0.4%		2.1%		5.29
Distribution & E-commerce	3.7%		2.0%		0.54
Agricultural Inputs & Services	1.1%		2.0%		1.82
Hospitality & Tourism	2.1%		2.0%		0.94
Prod. Tech. & Heavy Machinery	0.6%		1.4%		2.28
Metalworking Technology	0.3%		1.1%		3.68
Transport. & Logistics	1.3%		1.1%		0.81
Food Processing & Mfg.	0.7%		1.0%		1.34
Construction Products & Services	0.6%		0.6%		1.00
Federal Government (civilian)	1.4%		0.5%		0.37
Electric Power Generation & Transmission	0.1%		0.5%		4.48
Vulcanized & Fired Materials	0.2%		0.5%		2.96
OTHER TRADED CLUSTERS	10.6%		5.1%		
ALL LOCAL CLUSTERS	66.0%		69.4%		
Total	100.0%		100.0%		

WHY IT MATTERS

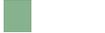
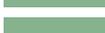
While local clusters (such as dentist offices) typically account for a similar share of employment across communities of varying size, the share of total employment represented by traded clusters (such as automotive assembly plants) may differ dramatically from one community to the next. Traded clusters that account for a larger-than-average share of total employment can suggest areas of competitive advantage. This figure compares the distribution of employment by cluster in the US (first column) with the local area (second column). The third column uses location quotients (LQs) to convey the intensity of employment locally relative to the US.

A **location quotient analysis** is a statistical technique used to suggest areas of relative advantage. LQs are typically calculated as an industry's share of total local employment divided by the same industry's share of employment at the national level. For example, if a traded cluster represents 1 percent of US employment and 5 percent of local employment, its LQ would be 5.0, meaning that the traded cluster in the local area is 5 times as large as would be expected based on national patterns. An LQ of 1.25 or greater is presumed to suggest a comparative advantage.

Sources: US Bureau of Labor Statistics; Emsi 2020.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.
Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi.

EMPLOYMENT CLUSTERS PROJECTED GROWTH

TRADED CLUSTERS WITH THE HIGHEST PROJECTED LOCAL JOB GAINS, 2019-2024

	US		EAST MICHIGAN COG		net gain
	5-yr. % change in nat'l. employment		5-yr. % change in local employment		
Automotive	5.1%		8.6%		+956
Agricultural Inputs & Services	2.9%		10.7%		+627
Hospitality & Tourism	4.4%		9.4%		+544
Distribution & E-commerce	6.0%		7.7%		+450
Education & Knowledge Creation	5.7%		4.1%		+426
Business Services	10.0%		3.8%		+392
Transport. & Logistics	5.2%		9.4%		+291
Construction Products & Services	10.5%		14.8%		+265
Plastics	1.7%		3.7%		+235
Prod. Tech. & Heavy Machinery	1.4%		5.2%		+205
Food Processing & Mfg.	5.1%		6.4%		+181
Electric Power Generation & Transmission	1.0%		12.5%		+176
Water Transport.	0.7%		35.3%		+158
IT & Analytical Instruments	4.0%		22.8%		+139
Federal Government (civilian)	2.0%		8.2%		+124
Livestock Processing	3.8%		27.0%		+120
Oil & Gas Production & Transport.	5.0%		16.7%		+98
Lighting & Electrical Equip.	3.2%		12.2%		+95
ALL TRADED CLUSTERS	5.0%		6.4%		+5,704
ALL LOCAL CLUSTERS	5.6%		0.0%		+22
Total	5.4%		2.0%		

WHY IT MATTERS

Understanding anticipated job growth in traded clusters is an essential element of the targeting process. This figure compares projected net job gains in percentage terms over a five-year horizon for the US (first column) and the local area (second column). The column on the far right shows projections (in numeric terms) for local net job gains in traded clusters in descending order. The last three rows of the exhibit—showing projected job growth aggregated for traded clusters, local clusters, and total employment—can help inform strategic discussions and refine goals for the future.

Sources: US Bureau of Labor Statistics; EMSI 2020.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies.
Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi.

TALENT DEMAND INDICATORS

ANALYSIS OF UNIQUE LOCAL JOB POSTINGS DURING CALENDAR YEAR 2019

INTENSITY OF JOB POSTINGS RELATIVE TO US BELOW AVG ►  ◀ ABOVE AVG

HIGH-DEMAND LOCAL OCCUPATIONS		HIGH-DEMAND LOCAL SKILLS	
	<i>location quotient</i>		<i>location quotient</i>
Combined Food Preparation and Serving Workers, Including Fast Food	1.88	Freightplus	2.17
Personal Care Aides	1.76	Cashiering	1.95
Heavy and Tractor-Trailer Truck Drivers	1.76	Care Plans	1.71
Cashiers	1.67	Home-Health	1.66
Medical Assistants	1.67	Banking	1.56
First-Line Supervisors of Retail Sales Workers	1.61	Merchandising	1.31
Nursing Assistants	1.60	Tractor-Trailers	1.30
Medical Secretaries	1.50	Medications	1.28
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1.47	Nursing	1.25
Retail Salespersons	1.45	Training Programs	1.08
Teachers and Instructors, All Other	1.45	Physical Requirements	1.02
First-Line Supervisors of Food Preparation and Serving Workers	1.28	Mathematics	1.01
Light Truck or Delivery Services Drivers	1.26	Distribution	0.94
Registered Nurses	1.21	Pricing	0.92
Customer Service Representatives	1.01	Controls	0.92
Insurance Sales Agents	0.96	Preventive Maintenance	0.87
Social and Human Service Assistants	0.96	Health Care	0.86
Stock Clerks and Order Fillers	0.81	Customer Experience	0.85
First-Line Supervisors of Office and Administrative Support Workers	0.78	Compliance	0.76
Sales Representatives, Services, All Other	0.62	Innovation	0.61

WHY IT MATTERS

An analysis of job postings can help re-frame our understanding of the local job market from the employer's perspective rather than simply through the lens of government statistics. This back-of-the-envelope analysis uses job postings from the prior calendar year to identify the most sought-out occupations (first column) and the most frequently occurring words and phrases (second column). LQs are used to approximate the local intensity of recruiting efforts and illustrate employer demand for specific "hard skills." A help wanted ad that appears locally at 5 times the relative rate as the US would have an LQ of 5.0; likewise a specific skill that appears more frequently in local postings than the national average would have an LQ greater than 1.0, suggesting higher demand in the local market. The results should prompt strategic questions about the alignment of the region's talent pipeline with the needs of employers and with target (traded) clusters.

Sources: US Bureau of Labor Statistics; EMSI 2020.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies. Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi.

TARGET SECTORS





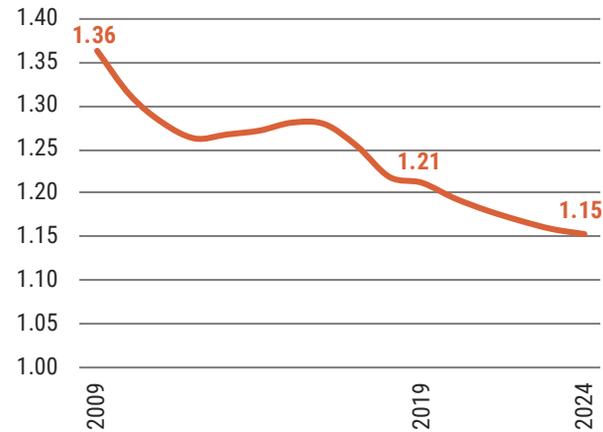
HEALTHCARE

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	1,204
2019 Employment	293,113	36,752
Net Change, 2009–2019	+7,991	-1,985
% Change, 2009–2019	+2.8%	-5.1%

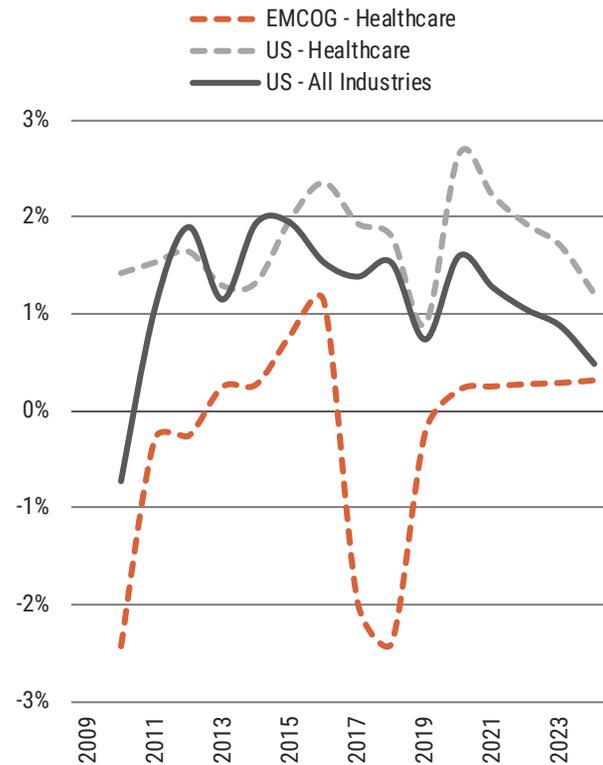
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

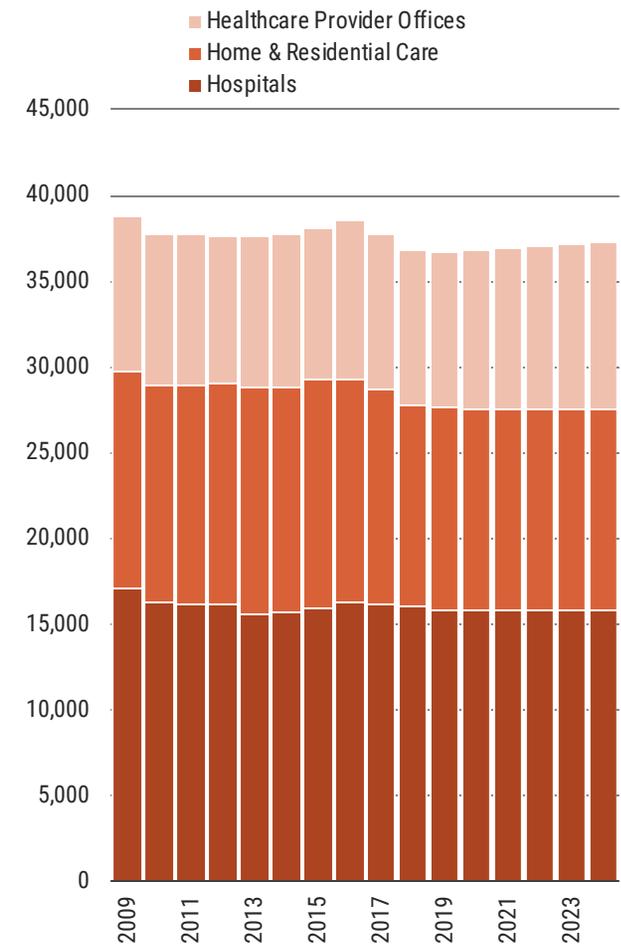


EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019–2024	+8,835,533	+1,717,862
Pct. Chg., 2019–2024	+5.4%	+10.1%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019–2024	+5,715	+493
Pct. Chg., 2019–2024	+1.9%	+1.3%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS BELOW AVG ►  ◀ ABOVE AVG

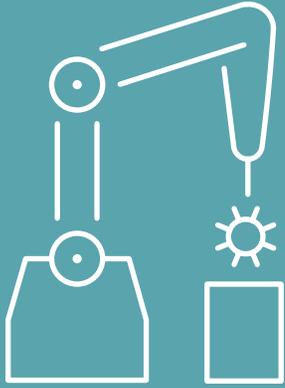
STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
29-1141	Registered Nurses	5,492	14.9%	0.98	33.22	0.96
31-1014	Nursing Assistants	3,566	9.7%	1.25	13.82	1.01
39-9021	Personal Care Aides	2,306	6.3%	1.21	10.87	0.94
31-1011	Home Health Aides	1,903	5.2%	1.39	11.03	0.95
43-6013	Medical Secretaries	1,488	4.0%	1.26	16.30	0.95
31-9092	Medical Assistants	1,456	4.0%	1.04	13.57	0.84
29-2061	Licensed Practical/Vocational Nurses	1,190	3.2%	0.91	21.49	0.97
43-4171	Receptionists & Information Clerks	805	2.2%	0.78	12.60	0.90
11-9111	Medical & Health Services Managers	678	1.8%	1.05	45.17	0.95
29-2021	Dental Hygienists	596	1.6%	1.29	28.59	0.79
29-2018	Clinical Laboratory Technologists and Technicians	582	1.6%	1.22	18.72	0.74
31-9091	Dental Assistants	579	1.6%	0.80	17.13	0.92
37-2012	Maids & Housekeepers	563	1.5%	1.10	11.22	0.99
29-1069	Physicians & Surgeons, All Other	560	1.5%	0.73	101.39	1.05
35-3041	Food Servers, Nonrestaurant	492	1.3%	1.48	11.71	1.05
43-9061	Office Clerks, General	492	1.3%	0.79	14.78	0.94
29-1123	Physical Therapists	490	1.3%	1.02	38.97	0.92
31-9097	Phlebotomists	429	1.2%	2.52	14.46	0.87
29-1126	Respiratory Therapists	375	1.0%	1.40	31.05	1.07
43-3021	Billing & Posting Clerks	368	1.0%	0.85	16.73	0.92
29-2034	Radiologic Technologists	328	0.9%	0.83	23.54	0.82
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	319	0.9%	0.81	15.44	0.88
35-2012	Cooks, Institution & Cafeteria	313	0.9%	1.10	12.36	0.96
29-2055	Surgical Technologists	297	0.8%	1.26	19.22	0.85
29-2071	Medical Records & Health Info. Technicians	288	0.8%	0.91	18.62	0.96

WHY IT MATTERS

Each target industry is underpinned by its workforce, making the occupational composition of each target worthy of further analysis. This exhibit shows each target's largest occupational contributors. The number of local jobs for each occupation is shown along with the occupation's weight (in percentage terms) within the target. The LQ compares the occupation's local weight to its national weight within this target. An LQ that exceeds 1.00 indicates a local occupation employed more heavily by the local target industry than national patterns might imply, while an LQ below 1.00 indicates relatively lighter local reliance on the occupation. Median local hourly earnings accompany the occupations shown in the exhibit. Wage ratios exceeding 1.00 indicate higher pay than the same occupation might expect nationally, while ratios below 1.00 suggest relatively lower compensation than the national level.

Sources: US Bureau of Labor Statistics; Emsi 2020.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi. For a discussion of LQs, please see page 3. Employment data and projections calculated in Q1 2020 do not include potential impacts of the COVID-19 crisis.



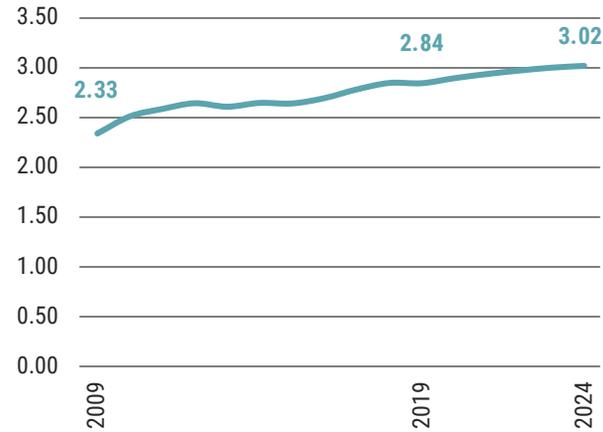
ADVANCED MANUFACTURING & MATERIALS

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	401
2019 Employment	293,113	28,564
Net Change, 2009–2019	+7,991	+6,489
% Change, 2009–2019	+2.8%	+29.4%

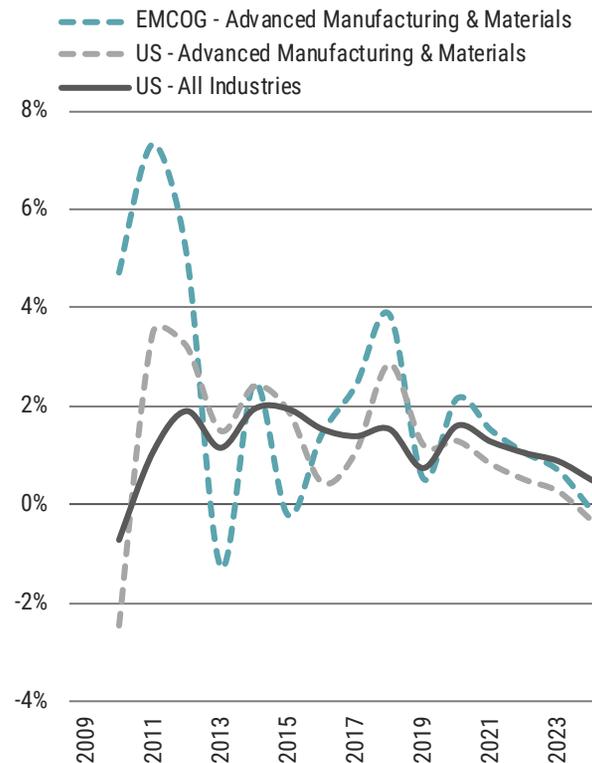
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



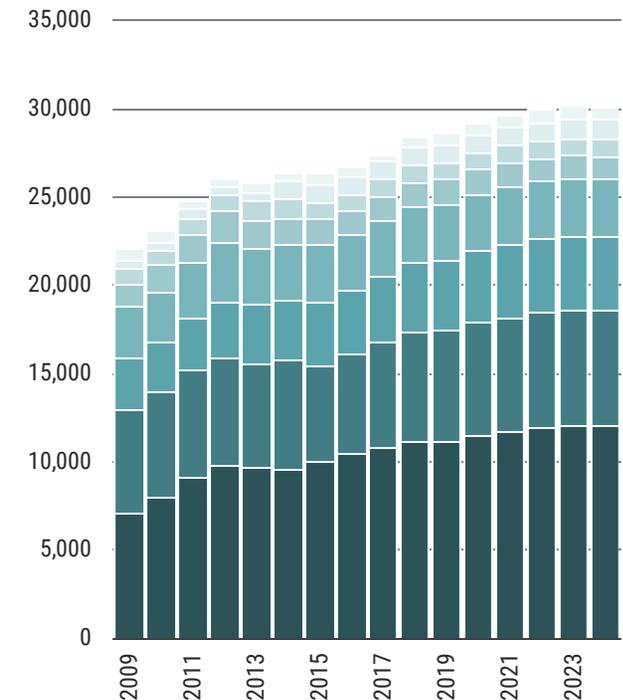
EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019–2024	+8,835,533	+145,798
Pct. Chg., 2019–2024	+5.4%	+2.6%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019–2024	+5,715	+1,548
Pct. Chg., 2019–2024	+1.9%	+5.4%

TARGET COMPONENTS

ANNUAL EMPLOYMENT

- Information Technology & Analytical Instruments
- Wood Products
- Downstream Metal Products
- Vulcanized & Fired Materials
- Metalworking Technology
- Production Technology & Heavy Machinery
- Plastics
- Automotive



TARGET STAFFING PROFILE

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
51-2098	Assemblers & Fabricators, All Other	3,660	12.8%	1.12	14.48	0.96
51-4041	Machinists	1,196	4.2%	1.46	18.16	0.87
51-4031	Cutting, Punching, & Press Machine, Metal/Plastic	1,163	4.1%	2.17	15.07	0.91
51-4111	Tool & Die Makers	1,125	3.9%	4.37	24.83	0.98
51-1011	First-Line Supvrs., Production & Operating Workers	1,064	3.7%	1.08	25.04	0.87
51-4072	Molding, Coremaking, & Casting, Metal/Plastic	890	3.1%	1.41	13.46	0.89
49-9041	Industrial Machinery Mechanics	680	2.4%	1.79	22.27	0.89
17-2112	Industrial Engineers	646	2.3%	1.21	35.52	0.85
51-4121	Welders, Cutters, Solderers, & Brazers	629	2.2%	0.77	16.59	0.84
17-2141	Mechanical Engineers	609	2.1%	1.25	31.63	0.75
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	591	2.1%	0.86	13.45	0.99
51-2028	Electrical & Electronic Equip. Assemblers	578	2.0%	0.81	14.94	0.92
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	562	2.0%	0.71	16.89	0.92
11-3051	Industrial Production Managers	529	1.9%	1.64	49.71	1.01
49-9071	Maintenance & Repair Workers, General	516	1.8%	1.37	15.73	0.85
51-9111	Packaging & Filling Machine Workers	450	1.6%	3.70	17.16	1.18
53-7051	Industrial Truck & Tractor Operators	446	1.6%	1.52	16.67	1.00
51-9011	Chemical Equipment Workers	443	1.6%	8.05	39.43	1.68
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	442	1.5%	0.89	25.16	0.90
51-4081	Multiple Machine Tool Workers, Metal/Plastic	429	1.5%	1.15	13.27	0.78
43-5071	Shipping, Receiving, & Traffic Clerks	404	1.4%	1.00	16.61	1.05
11-1021	General & Operations Managers	387	1.4%	0.79	36.34	0.75
51-4011	CNC Machine Operators, Metal/Plastic	360	1.3%	0.88	16.70	0.87
51-4071	Foundry Mold & Coremakers	357	1.3%	4.89	15.13	0.89
51-9041	Extruding, Forming, & Compacting Machine	350	1.2%	1.75	16.14	0.96

LQs & RELATIVE EARNINGS

BELOW AVG

ABOVE AVG



Sources: US Bureau of Labor Statistics; Emsi 2020.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi. For a discussion of LQs, please see page 3. Employment data and projections calculated in Q1 2020 do not include potential impacts of the COVID-19 crisis.



PROFESSIONAL SERVICES

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	1,487
2019 Employment	293,113	22,200
Net Change, 2009-2019	+7,991	-990
% Change, 2009-2019	+2.8%	-4.3%

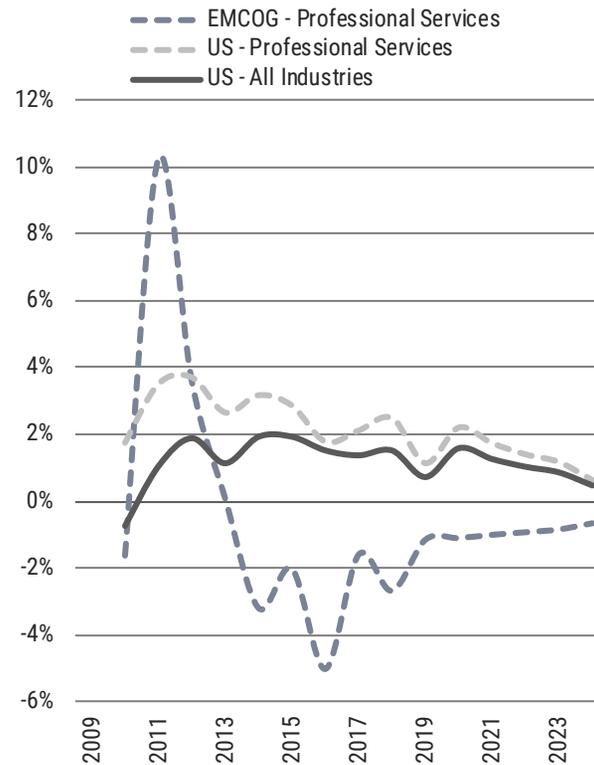
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

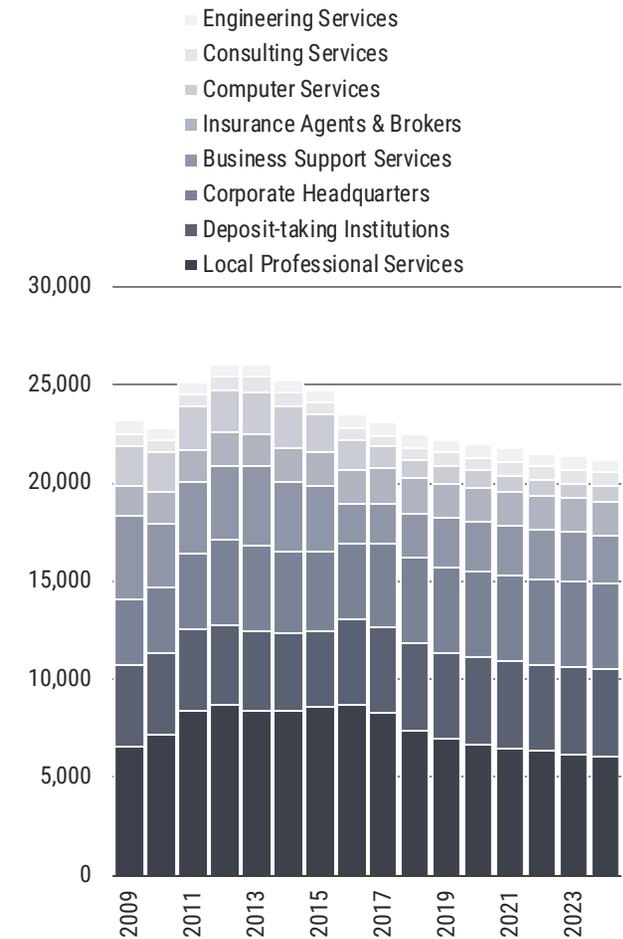


EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019-2024	+8,835,533	+1,333,785
Pct. Chg., 2019-2024	+5.4%	+7.4%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019-2024	+5,715	-1,006
Pct. Chg., 2019-2024	+1.9%	-4.5%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET STAFFING PROFILE

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
43-3071	Tellers	1,432	6.1%	3.47	12.60	0.89
43-4051	Customer Service Representatives	1,399	6.0%	1.32	13.83	0.85
41-3021	Insurance Sales Agents	1,045	4.4%	1.52	21.92	0.89
13-2011	Accountants & Auditors	855	3.6%	1.12	29.72	0.88
43-9061	Office Clerks, General	766	3.3%	1.36	14.78	0.94
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	618	2.6%	0.82	13.45	0.99
43-3031	Bookkeeping, Accounting, & Auditing Clerks	575	2.4%	1.22	16.64	0.86
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	549	2.3%	1.27	15.44	0.88
43-1011	First-Line Supvsr., Office & Admin. Support	470	2.0%	1.30	24.26	0.91
11-1021	General & Operations Managers	437	1.9%	0.91	36.34	0.75
23-1011	Lawyers	421	1.8%	0.61	38.28	0.68
11-3031	Financial Managers	420	1.8%	1.44	47.63	0.78
13-2072	Loan Officers	384	1.6%	2.02	23.95	0.79
51-2098	Assemblers & Fabricators, All Other	382	1.6%	1.42	14.48	0.96
13-1111	Management Analysts	375	1.6%	0.69	31.69	0.78
13-1161	Market Research Analysts & Mktng. Specialists	342	1.5%	1.12	23.07	0.76
41-3031	Securities, Commodities, & Financial Svcs. Sales	316	1.3%	1.53	15.28	0.50
13-1071	Human Resources Specialists	250	1.1%	0.94	27.73	0.95
43-4131	Loan Interviewers & Clerks	248	1.1%	1.95	14.23	0.74
13-1199	Business Operations Specialists, All Other	238	1.0%	0.81	25.41	0.75
41-3099	Sales Reps., Services, All Other	238	1.0%	0.59	22.14	0.85
15-1151	Computer User Support Specialists	228	1.0%	0.63	19.90	0.81
13-1081	Logisticians	219	0.9%	3.47	32.81	0.92
43-3021	Billing & Posting Clerks	217	0.9%	1.54	16.73	0.92
43-6012	Legal Secretaries	199	0.8%	1.01	15.50	0.70

LQs & RELATIVE EARNINGS

BELOW AVG

ABOVE AVG



Sources: US Bureau of Labor Statistics; Emsi 2020.1–QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi. For a discussion of LQs, please see page 3. Employment data and projections calculated in Q1 2020 do not include potential impacts of the COVID-19 crisis.



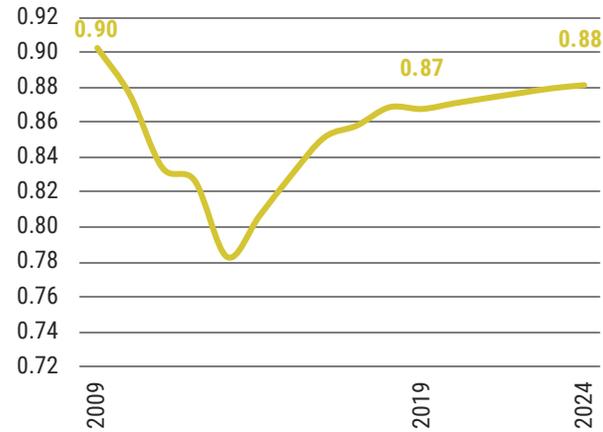
HIGHER EDUCATION & RESEARCH

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	56
2019 Employment	293,113	10,014
Net Change, 2009–2019	+7,991	-311
% Change, 2009–2019	+2.8%	-3.0%

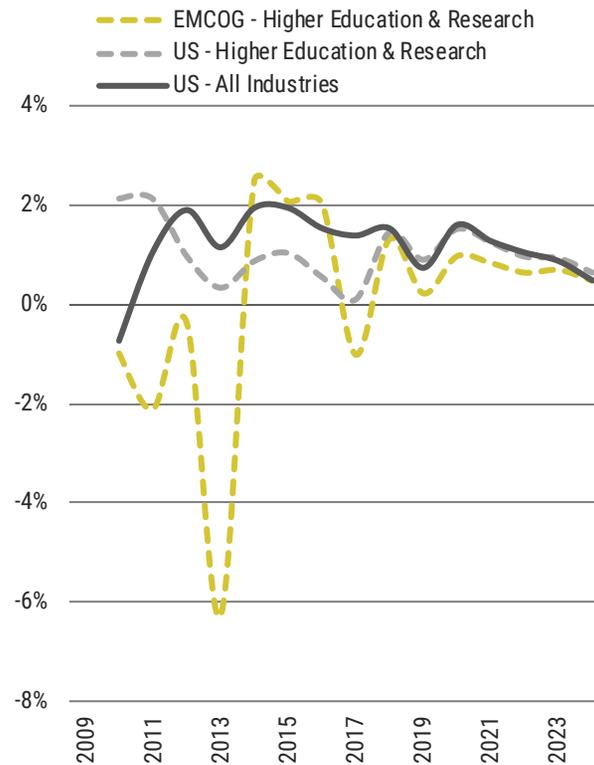
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

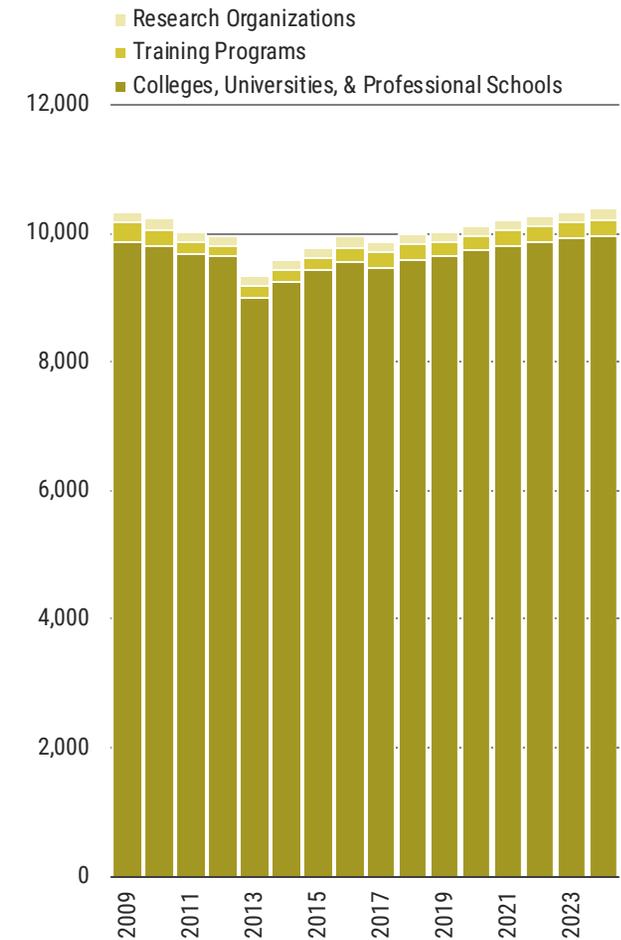


EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019–2024	+8,835,533	+351,252
Pct. Chg., 2019–2024	+5.4%	+5.4%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019–2024	+5,715	+361
Pct. Chg., 2019–2024	+1.9%	+3.6%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET STAFFING PROFILE

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
25-1099	Teachers, Postsecondary	2,171	21.7%	0.99	37.91	1.14
43-9061	Office Clerks, General	1,054	10.5%	1.31	14.78	0.94
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	759	7.6%	1.21	15.44	0.88
37-2011	Janitors & Cleaners, Exc. Maids & Housekeepers	460	4.6%	1.25	13.02	1.04
11-9033	Education Administrators, Postsecondary	399	4.0%	1.90	39.69	0.88
25-3097	Teachers & Instructors, All Other	229	2.3%	1.42	19.11	0.98
21-1012	Educ., Guidance, School, & Vocational Counselors	220	2.2%	1.56	21.36	0.79
49-9071	Maintenance & Repair Workers, General	209	2.1%	1.26	15.73	0.85
25-9041	Teacher Assistants	193	1.9%	1.37	12.38	0.95
15-1151	Computer User Support Specialists	165	1.6%	1.02	19.90	0.81
27-2022	Coaches & Scouts	158	1.6%	1.38	11.58	0.71
43-3031	Bookkeeping, Accounting, & Auditing Clerks	131	1.3%	1.06	16.64	0.86
25-4031	Library Technicians	123	1.2%	1.86	12.19	0.74
13-1199	Business Operations Specialists, All Other	116	1.2%	0.88	25.41	0.75
43-9199	Office & Admin. Support Workers, All Other	114	1.1%	0.81	19.42	1.16
19-4021	Biological Technicians	101	1.0%	1.45	21.31	1.00
33-9032	Security Guards	94	0.9%	0.90	11.63	0.85
37-3011	Landscaping & Groundskeeping Workers	89	0.9%	1.26	12.25	0.90
33-3051	Police & Sheriff's Patrol Officers	84	0.8%	1.13	21.55	0.73
25-3021	Teachers, Self-Enrichment Educ.	74	0.7%	0.53	16.12	0.84
43-1011	First-Line Supvrs., Office & Admin. Support	73	0.7%	1.01	24.26	0.91
43-4051	Customer Service Representatives	69	0.7%	0.97	13.83	0.85
43-6011	Exec. Secretaries/Admin. Assistants	68	0.7%	0.75	24.47	0.86
25-9031	Instructional Coordinators	67	0.7%	1.15	30.52	0.98
25-4021	Librarians	59	0.6%	1.68	20.86	0.73

LQs & RELATIVE EARNINGS

BELOW AVG

ABOVE AVG



Sources: US Bureau of Labor Statistics; Emsi 2020.1–QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi. For a discussion of LQs, please see page 3. Employment data and projections calculated in Q1 2020 do not include potential impacts of the COVID-19 crisis.



VALUE-ADDED AGRICULTURE & FOOD PROCESSING

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	471
2019 Employment	293,113	8,662
Net Change, 2009-2019	+7,991	+2,351
% Change, 2009-2019	+2.8%	+37.3%

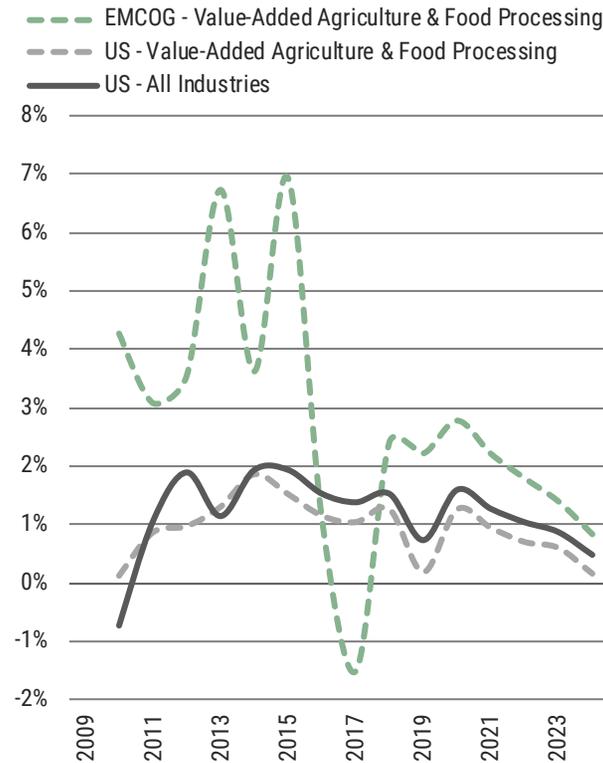
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

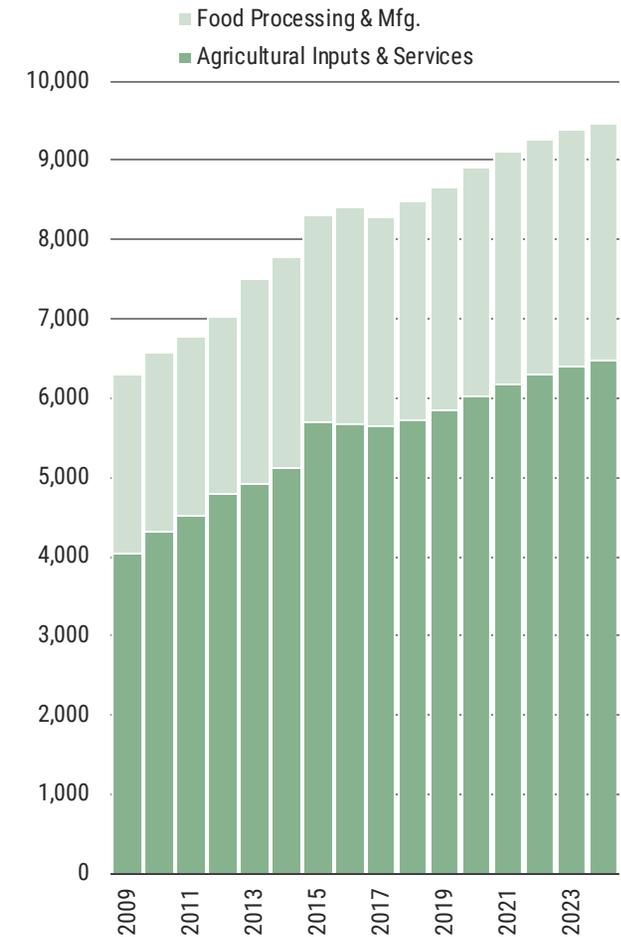


EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019-2024	+8,835,533	+112,431
Pct. Chg., 2019-2024	+5.4%	+3.8%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019-2024	+5,715	+808
Pct. Chg., 2019-2024	+1.9%	+9.3%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET STAFFING PROFILE

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
11-9013	Farmers, Ranchers, & Other Agricultural Mgrs.	2,014	23.3%	1.34	20.19	0.97
45-2092	Farmworkers & Laborers, Crop & Greenhouse	1,541	17.8%	0.89	12.15	1.04
45-2093	Farmworkers, Animals (Incl. Aquaculture)	610	7.1%	1.33	10.37	0.82
51-9111	Packaging & Filling Machine Workers	416	4.8%	1.02	17.16	1.18
45-2099	Agricultural Workers, All Other	299	3.5%	1.43	13.19	0.93
51-3092	Food Batchmakers	222	2.6%	0.74	16.94	1.19
45-2091	Agricultural Equipment Operators	198	2.3%	1.11	17.77	1.19
53-7064	Packers & Packers, Hand	180	2.1%	1.07	10.49	0.89
53-7062	Laborers/Freight, Stock, & Material Movers, Hand	167	1.9%	0.88	13.45	0.99
45-1011	First-Line Supvsr., Farming, Fishing, & Forestry	142	1.6%	1.10	18.33	0.82
53-3032	Heavy & Tractor-Trailer Truck Drivers	141	1.6%	1.00	18.45	0.88
53-7051	Industrial Truck & Tractor Operators	137	1.6%	1.00	16.67	1.00
49-9041	Industrial Machinery Mechanics	133	1.5%	1.35	22.27	0.89
51-1011	First-Line Supvsr., Production & Operating Workers	116	1.3%	0.95	25.04	0.87
49-9071	Maintenance & Repair Workers, General	95	1.1%	1.00	15.73	0.85
41-2031	Retail Salespersons	91	1.1%	1.46	10.94	0.94
41-4012	Sales Reps., Whls. & Mfg., Exc. Tech. & Scientific	89	1.0%	0.80	25.16	0.90
39-2021	Nonfarm Animal Caretakers	87	1.0%	1.69	10.51	0.91
51-9198	Helpers--Production Workers	80	0.9%	1.17	12.38	0.93
45-2041	Graders & Sorters, Agricultural Products	76	0.9%	0.71	11.68	0.99
43-9061	Office Clerks, General	71	0.8%	1.00	14.78	0.94
39-2011	Animal Trainers	68	0.8%	1.73	9.74	0.73
43-3031	Bookkeeping, Accounting, & Auditing Clerks	65	0.8%	0.97	16.64	0.86
43-6014	Secretaries/Admin. Asst., Exc. Legal, Med., & Exec.	65	0.7%	1.07	15.44	0.88
11-1021	General & Operations Managers	63	0.7%	0.79	36.34	0.75

LQs & RELATIVE EARNINGS

BELOW AVG

ABOVE AVG



Sources: US Bureau of Labor Statistics; Emsi 2020.1–QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

Notes: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the six-digit NAICS classifications used by Emsi. For a discussion of LQs, please see page 3. Employment data and projections calculated in Q1 2020 do not include potential impacts of the COVID-19 crisis.



TOURISM & OUTDOOR RECREATION

TARGET SNAPSHOT

EAST MICHIGAN COG	TOTAL	TARGET
2018 Payrolled Businesses	16,775	1,701
2019 Employment	293,113	32,380
Net Change, 2009–2019	+7,991	+2,974
% Change, 2009–2019	+2.8%	+10.1%

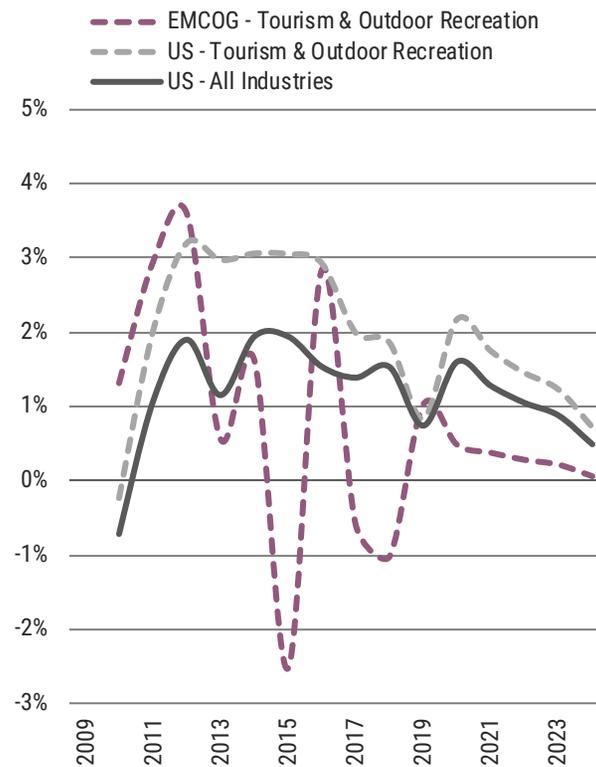
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

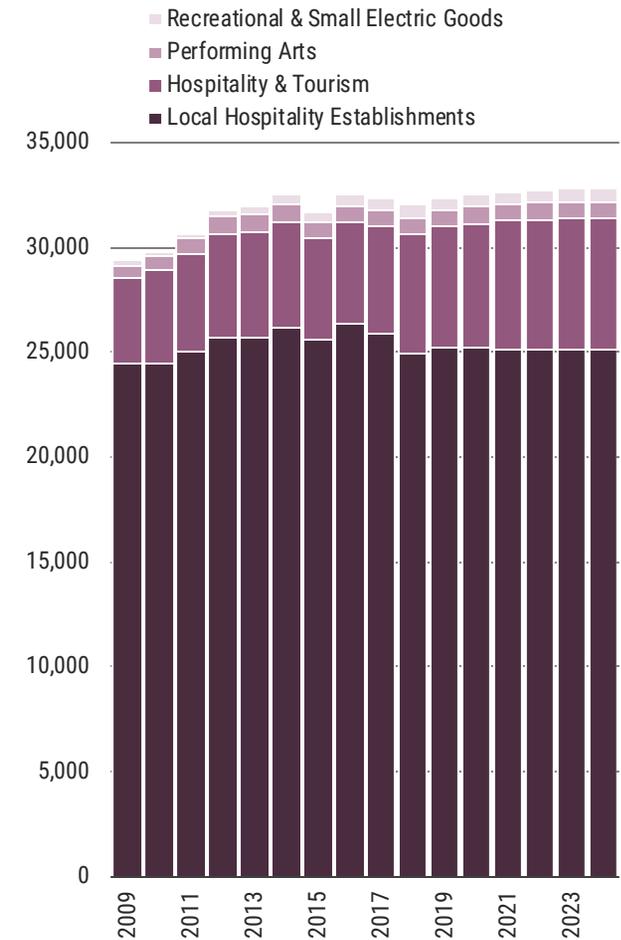


EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2019–2024	+8,835,533	+1,346,950
Pct. Chg., 2019–2024	+5.4%	+7.5%
EAST MICHIGAN COG	TOTAL	TARGET
Net Chg., 2019–2024	+5,715	+473
Pct. Chg., 2019–2024	+1.9%	+1.5%

TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET STAFFING PROFILE

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2019 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
35-3021	Combined Food Prep. & Servers, Incl. Fast Food	7,295	22.5%	1.24	9.94	0.97
35-3031	Waiters & Waitresses	4,788	14.8%	1.06	9.67	0.92
35-2014	Cooks, Restaurant	2,569	7.9%	1.06	11.15	0.87
35-3011	Bartenders	1,361	4.2%	1.32	9.67	0.89
35-1012	First-Line Supvsr., Food Prep. & Servers	1,336	4.1%	0.88	14.71	0.94
35-9021	Dishwashers	832	2.6%	1.01	9.73	0.89
41-2011	Cashiers	663	2.0%	0.78	10.31	0.96
35-9031	Hosts & Hostesses	649	2.0%	0.88	9.89	0.93
37-2012	Maids & Housekeepers	648	2.0%	0.73	11.22	0.99
35-2021	Food Preparation Workers	633	2.0%	0.71	10.82	0.95
41-2031	Retail Salespersons	538	1.7%	1.96	10.94	0.94
35-3022	Counter Attendants, Cafeteria, & Concession	538	1.7%	0.88	9.82	0.91
35-9011	Attendants & Bartender Helpers	508	1.6%	0.68	9.98	0.93
35-2011	Cooks, Fast Food	505	1.6%	0.58	11.00	1.03
41-3041	Travel Agents	420	1.3%	3.01	15.84	0.86
43-4081	Hotel, Motel, & Resort Desk Clerks	404	1.2%	0.89	11.04	0.97
43-4051	Customer Service Representatives	396	1.2%	2.46	13.83	0.85
39-3091	Amusement & Recreation Attendants	374	1.2%	0.77	10.13	0.95
11-9051	Food Service Managers	369	1.1%	0.80	22.24	0.94
53-3031	Driver/Sales Workers	354	1.1%	0.93	12.21	1.03
11-1021	General & Operations Managers	312	1.0%	0.96	36.34	0.75
37-3011	Landscaping & Groundskeeping Workers	293	0.9%	1.36	12.25	0.90
49-9071	Maintenance & Repair Workers, General	287	0.9%	0.95	15.73	0.85
43-9061	Office Clerks, General	259	0.8%	1.49	14.78	0.94
39-9031	Fitness Trainers & Aerobics Instructors	222	0.7%	0.47	16.25	0.86

LQs & RELATIVE EARNINGS

BELOW AVG

ABOVE AVG



Sources: US Bureau of Labor Statistics; Emsi 2020.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.

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INDUSTRY INTELLIGENCE



HEALTHCARE

TRADE ASSOCIATIONS

American Hospital Association (AHA)

www.aha.org

American Health Care Association (AHCA)

www.ahcancal.org

Health Care Association of Michigan (HCAM)

www.hcam.org

Michigan Health & Hospital Association (MHA)

www.mha.org

Michigan State Medical Society (MSMS)

www.msms.org

Michigan HomeCare & Hospice Association (MHHA)

www.mhha.org

Michigan Primary Care Association (MPCA)

www.mpca.net

RELEVANT CONFERENCES / EVENTS

MAFP Annual Meeting

August 8, 2020 | Virtual

www.mafp.com/get-involved/annual-meeting

AHA Virtual Conference- Navigating a New Reality:

Health Care Leaders Confront the Future

September 14–16, 2020 | Virtual

www.aha.org/education-events/aha-virtual-conference-navigating-new-reality-health-care-leaders-confront-future

Physician Leadership Experience: Achieving Resilience and Well-Being

September 21–23, 2020 | Glen Arbor, Michigan

www.aha.org/education-events/physician-leadership-experience-achieving-resilience-and-well-being

71st AHCA/NCAL Convention & Expo

October 8–31, 2020 | Virtual

www.eventscribe.com/2020/AHCANCAL

MSMS Annual Scientific Meeting

October 21–24, 2020 | Southfield, MI

www.msms.org/Education/Annual-Scientific-Meeting

2021 MHHA Annual Conference

May 12–14, 2021 | Acme, MI

www.mhha.org/2021-exhibitorsponsors

TRADE PUBLICATIONS

The American Journal of Medicine

www.amjmed.com

Journal of Hospital Management and Health Policy

jhmhp.amegroups.com

Healthcare: The Journal of Delivery Science and Innovation

www.journals.elsevier.com/healthcare-the-journal-of-delivery-science-and-innovation

Michigan Journal of Medicine

www.michjmed.org

Michigan Journal of Public Health

www.mipha.org/mjph

Promoting Excellence

www.officialmediaguide.com/hcm

Note: All events were correct at the time of this report's publication. Due to COVID-19, all events are subject to postponement or cancellation.

ADVANCED MANUFACTURING & MATERIALS

TRADE ASSOCIATIONS

Alliance of Automobile Manufacturers
autoalliance.org

MICHauto
michauto.org

Alliance for Automotive Innovation
www.autosinnovate.org

Michigan Manufacturing Association
mimfg.org

National Association of Manufacturers (NAM)
www.nam.org

Fabricators & Manufacturers Association, International
www.fmamfg.org

Laboratory Products Association (LPA)
www.lpanet.org

Association of Equipment Manufacturers (AEM)
www.aem.org

Heavy Duty Manufacturers Association (HDMA)
www.hdma.org

RELEVANT CONFERENCES / EVENTS

Heavy Duty Dialogue (HDD) Conference
September 15, 2020 | Virtual
www.hdma.org/events/heavy-duty-dialogue-hdd-virtual-conference

Stamping in an EV World Conference
September 29, 2020 | Ann Arbor, Michigan
www.fmamfg.org/events/334305865/stamping-in-an-ev-world-conference

LPA Annual Meeting
October 5–7, 2020 | Virtual
www.lpanet.org/i4a/pages/index.cfm?pageid=3288

11th Annual American Manufacturing Strategies Summit
October 19–20, 2020 | Houston, Texas
www.manufacturing-summit.com

FABTECH
November 18–20, 2020 | Las Vegas, Nevada
www.fabtechexpo.com

FMA Annual Meeting
March 2–4, 2021 | Miami, Florida
annualmeeting.fmanet.org

TRADE PUBLICATIONS

Journal of Manufacturing Processes
www.journals.elsevier.com/journal-of-manufacturing-processes

Journal of Manufacturing and Materials Processing
www.mdpi.com/journal/jmmp

Manufacturing Engineering
www.sme.org/manufacturing-engineering-magazine

Manufacturing Technology Insights
www.manufacturingtechnologyinsights.com

The Fabricator
www.thefabricator.com

MiMfg Magazine
mag.mimfg.org

American Laboratory
www.americanlaboratory.com

Driven
michauto.org/michauto/driven

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PROFESSIONAL SERVICES

TRADE ASSOCIATIONS

National Association of Corporate Directors (NACD)

www.nacdonline.org

Association for Corporate Growth (ACG)

www.acg.org

Society for Marketing Professional Services- Michigan Chapter (SMPS-MI)

smps-mi.org

Michigan Information Systems Association (MISA)

www.misasom.org

CompTIA

www.comptia.org

Michigan Small Business Development Center

sbdcmichigan.org

ISACA Detroit Chapter

engage.isaca.org/detroitchapter/home

Michigan Association of CPAs (MICPA)

www.micpa.org

Michigan Society of Association Executives (MSAE)

www.msae.org

Society for Information Management- Detroit Chapter

chapter.simnet.org/detroit/home

RELEVANT CONFERENCES / EVENTS

ORGPRO 2020

August 4–5, 2020 | Kalamazoo, MI

www.msae.org/ORGPRO1

ChannelCon

August 4–6, 2020 | Virtual

www.comptia.org/channelcon/agenda

Build Business 2020

October 8–10, 2020 | Austin, Texas

www.smps.org/buildbusiness

MISA Annual Conference

October 10–11, 2020 | Traverse City, Michigan

www.misasom.org/annual_conference.php

NACD Summit 2020

October 12–13, 2020 | Virtual

summit.nacdonline.org

The Pinnacle Experience

October 4–6, 2021 | New Orleans, Louisiana

www.smps.org/learning/premier-events/the-pinnacle-experience/

TRADE PUBLICATIONS

Corp! Magazine

www.corpmagazine.com

The Wall Street Journal

www.wsj.com

Business Process Management Journal

www.emeraldgrouppublishing.com/journal/bpmj

Marketer Journal

www.smps.org/resources/marketer-journal

CompTIA World

www.comptia.org/resources/comptiaworld-magazine

NACD Insights

www.nacdonline.org/insights

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HIGHER EDUCATION & RESEARCH

TRADE ASSOCIATIONS

Association of American Colleges & Universities (AAC&U)

www.aacu.org

American Association for Higher Education (AAHE)

aahea.org

Association for Continuing Higher Education (ACHE)

www.acheinc.org

Michigan Association for Institutional Research (MI/AIR)

miair.org

Michigan Association for Continuing Education and Training (MACET)

macet.org

Michigan Community College Association (MCCA)

www.mcca.org

Michigan Association of State Universities (MASU)

www.masu.org

Michigan Education Association (MEA)

mea.org

Michigan Educational Research Association

merainc.org

Educational Technology Organization of Michigan (ETOM)

etom.org

RELEVANT CONFERENCES / EVENTS

AIR Forum Annual Conference

June 29–July 1, 2020 | Virtual

www.airweb.org/collaborate-learn/air-forum

MEA Summer Conference

July 29–30, 2020 | Virtual

mea.org/summer-conference

MEA Higher Education Conference

July 31–August 2, 2020 | Orlando, Florida

mea.org/higher-education-conference/

82nd Annual ACHE Conference

October 11–14, 2020 | Virtual

www.acheinc.org/page-18649

HighEdWeb 2020

October 19–20, 2020 | Virtual

2020.highedweb.org

34th Annual MI/AIR Conference

November 4–6, 2020 | Virtual

miair.org/conferences/online-2020

2020 Transforming STEM Higher Education

November 5–7, 2020 | Arlington, Virginia

www.aacu.org/conferences/stem/2020

TRADE PUBLICATIONS

The International Journal of Higher Education Research

www.springer.com/journal/10734

The Journal of Continuing Higher Education

www.acheinc.org/news/5994737

The Chronicle of Higher Education

www.chronicle.com

Inside Higher Ed

www.insidehighered.com

The AIR Professional File

www.airweb.org/resources/publications/professional-file

MEA Voice

mea.org/mea-voice-magazine

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VALUE-ADDED AGRICULTURE & FOOD PROCESSING

TRADE ASSOCIATIONS

Institute of Food Technologists (IFT)

www.ift.org

Council for Agricultural Science and Technology (CAST)

www.cast-science.org

Agricultural & Applied Economics Association (AAEA)

www.aaea.org

Food Processing Suppliers Association (FPSA)

www.fpsa.org

Farm Equipment Manufacturers Association

www.farmequip.org

Michigan Agri-Business Association (MABA)

www.miagbiz.org

Michigan Farmers Market Association

mifma.org

Association of Equipment Manufacturers (AEM)

www.aem.org

RELEVANT CONFERENCES / EVENTS

SHIFT20

July 13–15, 2020 | Virtual

www.iftevent.org/#ift20updates

2020 AAEA Annual Meeting

August 10–11, 2020 | Virtual

www.aaea.org/meetings/2020-aaea-annual-meeting

2021 MABA Winter Conference

January 11–13, 2021 | Lansing, Michigan

www.miagbiz.org/events/winter-conference

FPSA 2021 Annual Conference

March 2–4, 2021 | Indian Wells, California

www.fpsa.org/annual-conference

Commodity Classic, An AEM Collaboration

March 4–6, 2021 | San Antonio, Texas

www.aem.org/events/trade-shows/commodity-classic-an-aem-collaboration

2021 Michigan Farmers Market Conference

March 9–10, 2021 | East Lansing, Michigan

mifma.org/conference

Supply Chain Summit & Showcase 2021

April 7–9, 2021 | Kansas City, Missouri

www.farmequip.org/meetings/spring/2020

PROCESS EXPO 2021

October 12–15, 2021 | Chicago, Illinois

www.myprocessexpo.com

CONEXPO-CONAG

March 14–18, 2023 | Las Vegas, Nevada

www.conexpoconagg.com

TRADE PUBLICATIONS

The American Journal of Agricultural Economics

www.aaea.org/publications/ajae

IFTNext

www.ift.org/iftnext

Food Technology

ift.org/news-and-publications/food-technology-magazine

Food Processing

www.foodprocessing.com

Ag Innovator

www.farmequip.org/publications/ag-innovator

Choices

www.aaea.org/publications/choices-magazine

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TOURISM & OUTDOOR RECREATION

TRADE ASSOCIATIONS

American Hotel & Lodging Association (AHLA)

www.ahla.com

Michigan Restaurant & Lodging Association (MRLA)

www.mrla.org

Outdoor Industry Association (OIA)

outdoorindustry.org

Michigan Retailers Association (MRA)

www.retailers.com

Michigan Humanities

www.michiganhumanities.org

Michigan Festivals & Events

www.michiganfun.com

Michigan Association of Convention and Visitor Bureaus (MACVB)

www.visitmichigan.org

Go Great Lakes Bay

www.gogreat.com

Saginaw Arts & Enrichment Commission

www.artsaginaw.org

RELEVANT CONFERENCES / EVENTS

Outdoor Retailer Summer

July 21–23, 2020 | Virtual

www.outdoorretailer.com

MACVB Education Conference

September 27–29, 2020 | Virtual

www.visitmichigan.org/conference.html

MUFSSO 2020

September 28–30, 2020 | Denver, Colorado

www.mufso.com/2020/Public/Enter.aspx

Buy Nearby Weekend

October 2–4, 2020 | Michigan

buynearbymi.com

2020 Political Action Committee Holiday Dinner

December 7, 2020 | Rochester, Michigan

www.mrla.org/pac-fundraisers.html

TRADE PUBLICATIONS

Journal of Outdoor Recreation & Tourism

www.journals.elsevier.com/journal-of-outdoor-recreation-and-tourism

Restaurant Hospitality

www.restaurant-hospitality.com

Lodging Magazine

lodgingmagazine.com

Journal of Hospitality & Tourism Research

journals.sagepub.com/home/jht

Michigan Food News

<https://issuu.com/michiganretailersassociation>

Michigan Retailer

www.retailers.com/news-events/michigan-retailer

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