

GREATER ROCKFORD CHAMBER OF COMMERCE

ECONOMIC DEVELOPMENT ROADMAP

OCTOBER 2025



PREPARED BY



EIGHT FIFTEEN
Impact



**GREATER
ROCKFORD**
CHAMBER OF COMMERCE

STEERING TOWARD A THRIVING FUTURE

The GRCC Economic Development Roadmap lays the foundation for a coordinated, results-driven approach to growing the Greater Rockford Region. It reflects the collective insights of business leaders, municipal partners, and regional stakeholders who share a common goal: to strengthen our economy, expand opportunity, and elevate the region’s competitiveness.

Now is the time to move from planning to action. By aligning around shared priorities — business retention and expansion, marketing and attraction, workforce development, site readiness, and innovation — we can build the regional capacity needed to deliver measurable results. The success of this roadmap depends on continued collaboration and investment. We invite every partner, public, private, and civic, to play an active role in advancing this work. Together, we can create a thriving, resilient economy that reflects the best of who we are and the promise of what’s ahead.

Upon completion of the 2023 merger of the Rockford Chamber of Commerce, the Rockford Area Economic Development Council, and the Greater Rockford Growth Partnership, the Greater Rockford Chamber of Commerce (GRCC) was afforded a unique opportunity



to unify efforts, strengthen collaboration, and redefine and re-energize economic development priorities in the Rockford Region.

Since then, GRCC has focused efforts to enhance its organizational capacity to lead these efforts effectively — integrating business retention, expansion, and attraction strategies into its programs and services while working in close coordination with key partners. This alignment is positioning the region for sustained economic success and a thriving business community.

**ANGELA KAY LARSON, CEO
GREATER ROCKFORD CHAMBER OF COMMERCE**



APPROACH TO PLANNING

The Rockford Region has made significant strides in economic progress, with key developments reflecting the region’s resilience and commitment to growth. To build on this momentum, collaborative efforts are needed to accelerate economic development and ensure equitable opportunities across the region.

GRCC’s vision to relentlessly grow, develop, and support a thriving business community positions them as the leading economic development organization to unify these efforts for Winnebago County and the broader region. In this leadership role, GRCC is charged with telling the region’s stories, supporting its employers, and driving measurable outcomes.

The GRCC Economic Development Roadmap is the result of a six-month collaborative effort to gather feedback from key stakeholders and regional partners; conduct an in-depth review of the organization’s current role and capacity in business retention, expansion, and attraction; assess the Rockford MSA’s broader economic landscape; and synthesize the most significant trends shaping economic futures across the U.S. and abroad.

These data points form the foundation of a stakeholder-reviewed strategy that prioritizes GRCC’s business retention, expansion, and attraction work into focused areas with clearly defined goals and organizational roles. The complete Economic Development Roadmap document includes a tactical plan outlining specific, measurable, and time-bound actions that align with GRCC’s current and evolving staff capacity and funding.

While economic development is a community-wide endeavor involving the collective contributions of many organizations – each excelling within its own area of expertise – the GRCC Economic Development Roadmap seeks to clearly define GRCC’s role in advancing the region’s economic progress. It does so by leveraging the organization’s strong leadership and reputation, its power to convene and influence public-private collaboration, and its natural position as a champion of business growth.



A REGION ON THE RISE

The economic landscape in Winnebago County and across the U.S. is transforming faster than at any time in recent history. Several converging trends are redefining how communities are approaching economic development.

- **Industry Transformation:** Traditional manufacturing — long the backbone of the Rockford Region’s employment base — remains the largest contributor to our local economy. Employment has declined as output increases due to automation, robotics, and digital technologies that are reshaping production processes, demanding new skillsets, and driving capital investment.
- **Workforce Evolution:** Employers are increasingly seeking adaptable workers who combine technical proficiency with strong analytical and problem-solving skills. This shift underscores the need for coordinated action among educators, workforce providers, and industry partners and a reliance on foundational skill-building from secondary and postsecondary education programs.
- **Global Supply Chain Realignment:** Reshoring and nearshoring trends are creating new opportunities for regions like Winnebago County, which combine a strong manufacturing heritage with robust logistics networks and infrastructure. However, competition for these projects is intense, underscoring the need for proactive marketing and business outreach efforts, along with continued investment in site readiness and development.
- **Entrepreneurship and Innovation:** Growth in small, high-tech, and niche manufacturing firms is reshaping regional economies. These companies rely on agile ecosystems that can provide support, visibility, and coordination.
- **Population Movement:** After years of no growth, Winnebago County saw nearly 1% population growth between 2023 and 2024, a sign of renewed momentum and quality-of-life appeal. This creates both opportunity and responsibility to ensure local job growth and housing keep pace with population gains.
- **Artificial Intelligence:** AI is not a single technology but a pervasive force reshaping how industries operate and compete. The region’s ability to adapt — through upskilling, cross-sector collaboration, business attraction strategies, and proactive investment — will determine its position in the emerging AI economy.

ROADMAP STRATEGIC INPUTS

<p>GRCC Vision</p>	<p>Relentlessly grow, develop, and support a thriving business community.</p>
<p>Alignment with Community Plans</p>	<p>This Economic Development Roadmap complements and reinforces other major regional and municipal plans. It ensures that the Roadmap builds on existing efforts, avoids duplication, and helps create a unified direction for the region’s economic growth.</p>
<p>Stakeholder Insights</p>	<p>The plan incorporates key themes and perspectives gathered from business leaders, municipal partners, and regional stakeholders. It highlights what was heard through interviews, surveys, and roundtables while focusing on shared priorities, recurring challenges, and opportunities for greater collaboration.</p>
<p>Community Analysis</p>	<p>The community analysis examined demographic, economic, and workforce data to provide a clear picture of the region’s current conditions and long-term trends. This includes population shifts, labor force participation, industry specialization, income levels, and quality-of-life indicators.</p>
<p>Organizational Assessment</p>	<p>This assessment evaluates the current capacity, structure, and performance of the region’s primary economic development entity. It reviews existing programs, staffing, partnerships, and resources to determine how well the organization is positioned to deliver on its mission and this roadmap.</p>



ALIGNMENT WITH OTHER COMMUNITY PLANS

Eight Fifteen Impact conducted a comprehensive review of existing planning documents and initiatives to ensure alignment with ongoing efforts led by key partners and community organizations. This review process provided a clear understanding of the region’s strategic priorities, current investments, and shared goals.

By identifying areas of overlap and opportunity, Eight Fifteen Impact ensured that this plan builds upon – rather than duplicates – work that is already underway, fostering a coordinated and forward-looking approach to community and economic development.

✓ RECENT PLANS & CONCURRENT PLANNING REVIEW

Greater Rockford Chamber of Commerce Blueprint for Leading Business Growth (2025 – 2029)

Rockford Region Comprehensive Economic Development Strategy (CEDS) (2026 – 2030)

Illinois Northern Stateline Regional and Local Workforce Plan (2024-2028)

THRIVE 2035 Destination Master Plan (September 2024)

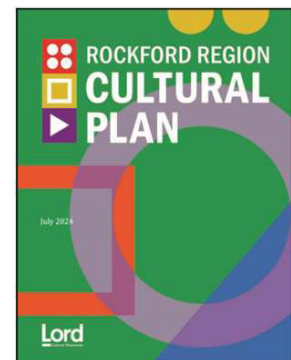
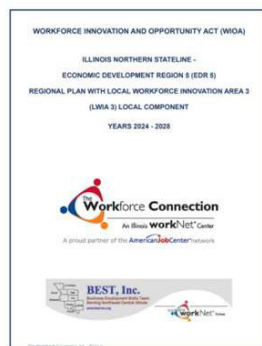
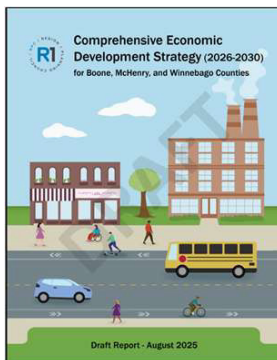
Rockford Region Cultural Plan (July 2024)

City of Rockford 2040 Plan

Village of Winnebago Strategic Plan (June 2025)

Growth Dimensions Strategic Plan: 2040 Vision

RAEDC Strategic Plan (2023 – 2026)



STAKEHOLDER SUMMARY

7 Interviews with Municipal Partners	THEMES
4 Regional Partner Meetings	Rebuilding and Clarifying the EDO's Core Role
3 Economic Development Committee Meetings	Enhancing Business Retention & Workforce Integration
3 1:1 Interviews with GRCC Staff	Strengthening the Value EDO Provides through Municipal Collaboration
2 Roundtables	Building Effective Organizational Capacity
1 All-Day Project Kick-off	Supporting Site Readiness with Region 1 Planning Council's Lead

“IN THEIR WORDS”

- Business retention/expansion and marketing should be core functions of EDO.
- Focus should be on reestablishing the benefit/value the RAEDC provided for business attraction.
- Need to determine optimal team design to effectively implement workplan.
- Should formalize process for notifying municipal partners of opportunities to engage before and after BRE visits.
- Need to show how ED work expands capacity of municipalities and staff and adjust to support new/emerging opportunities and incentives.
- Must ensure EDO direction aligns with needs of municipal partners.
- What will be the role of EDO be in supporting retail attraction?
- Current utility capacities and inability to work on upgrades without an end user or customer is a threat to site development.
- Great to see attention to outcomes in BRE visits; not just about visits but what is the impact?
- Overall, this plan restores much of the important EDO functions vacated by RAEDC; what we've been wanting to see.
- R1 has aligned many partners and resources to lead site readiness – opportunity to collaborate.
- Need to make sure we are not duplicating efforts that already exist or are underway.
- How can we extend collaboration with partners when conducting BRE visits?

FRAMEWORK FOR COMMUNITY AND ORGANIZATIONAL ASSESSMENT

The goal of the community and organization assessment is to understand the local business climate and regional economic development landscape while strengthening the capacity to support business retention, expansion, and attraction efforts with a focus on industrial sectors. This process identifies strengths for GRCC and its partners to build on, as well as areas that require more focused planning and additional resources.

ANALYTICAL FRAMEWORK



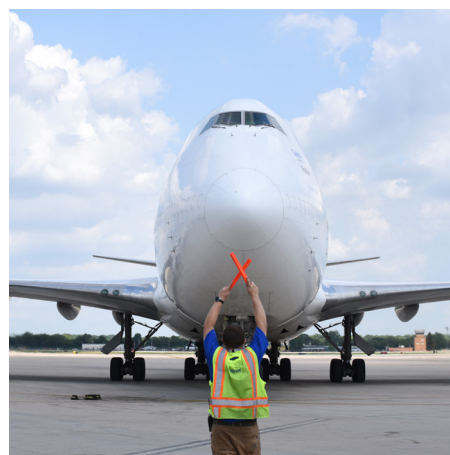
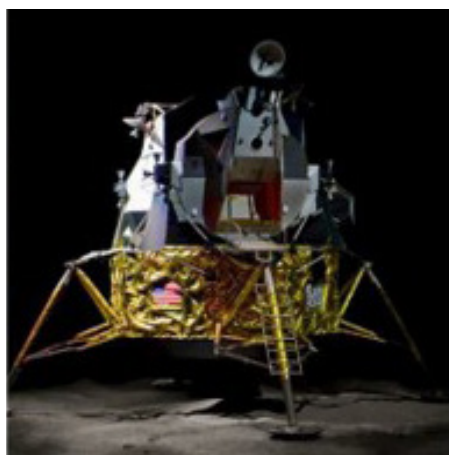
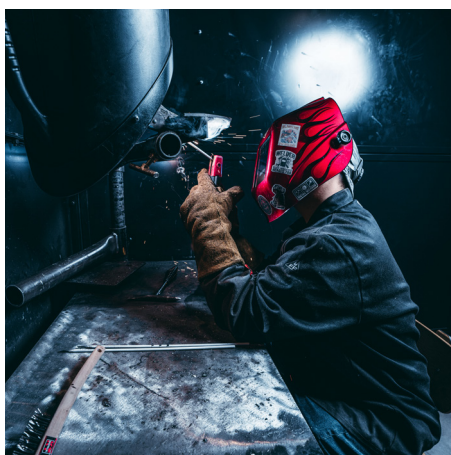
COMMUNITY ASSESSMENT

REGIONAL STRENGTHS TO BUILD ON

Winnebago County has a strong foundation on which to build a next-generation economic development strategy:

- **Resilient Aerospace Industry:** The Rockford Region’s globally recognized aerospace supply chain continues to innovate and export, supporting thousands of high-quality jobs.
- **Technical Workforce and Skilled Trades:** The region’s strong legacy in precision machining and advanced manufacturing has cultivated a deep base of technical talent and hands-on expertise.
- **Strong Education and Training Partners:** Local institutions and technical programs are well positioned to align with industry needs, ready to adapt to emerging technologies.
- **Population Growth:** The nearly 1% population increase between 2023 and 2024 marks a positive demographic turning point after a period of stagnation.
- **Strategic Location:** The county’s proximity to interstates, rail, and Chicago-Rockford International Airport positions it as a natural logistics and advanced manufacturing hub.
- **Partner Collaboration:** In addition to existing examples of partnership among organizations, there is a deep network of groups making meaningful contributions to community and economic development—and a strong, shared willingness to collaborate rather than duplicate efforts.

These strengths, when paired with a modern, proactive economic development structure, are forming the basis of a resilient and competitive regional economy.



COMMUNITY ASSESSMENT

KEY CHALLENGES AND STRATEGIC PRIORITIES

- **Declining Manufacturing Employment Base:** While the Rockford Region’s manufacturing sector remains 2.5 times more concentrated than the national average, employment has declined post-COVID despite output rebounding to well above pre-pandemic levels. This signals major structural shifts within the industry and productivity gains that are reshaping workforce needs.
- **Aging Workforce and Skill Gaps:** Despite the region’s strong base of technical talent and hands-on expertise, much of this experience resides in an aging workforce. Ensuring effective knowledge transfer and next-generation skill development is critical. The availability of skilled labor was identified as the #1 barrier to growth in the GRCC Business Sentiment Survey (Q1, Q2 & Q3 2025).
- **Educational Attainment:** The region’s rates of high school, bachelor’s, and graduate degree attainment trail behind peer regions and national averages. Educational attainment remains both a key site selection factor for employers and an indicator of internal community growth potential, underscoring the need for coordinated action.
- **Industry Diversification:** The Rockford MSA’s unemployment rate averaged 10.6% in 2021, nearly twice that of peer regions. This reflects the area’s heavy reliance on transportation-related manufacturing (aerospace and aviation) – industries hit hardest by the pandemic. Even with unemployment dropping to 3.6% in 2024, manufacturing employment continues to decline relative to output over time, signaling a growing need for a diversification strategy that embraces the future of work across both industrial and non-industrial sectors.
- **Site Readiness:** While the region offers several industrial sites of significant acreage, there is opportunity to coordinate efforts to prioritize, prepare, and market these sites. A more strategic approach is needed to increase competitiveness for large-scale business attraction opportunities that require substantial acreage and utility capacity.
- **Innovation:** In 2020, the region recorded its highest number of new patent filings since 1992, but filings have declined steadily since. None the less, the region now leads its peers in new business formation since 2020. Greater emphasis is needed on telling the innovation story, attracting new investment, and accelerating the development of emerging ideas and technologies.

These dynamics underscore the need for greater coordination, professional specialization, and consistent outreach to help Winnebago County stay ahead of economic shifts.

ORGANIZATIONAL ASSESSMENT

GRCC SWOT ANALYSIS

Biggest Takeaway: At the time of publication, GRCC was leading economic development efforts for Winnebago County with a lean structure: one full-time staff member dedicated to managing business expansion & attraction opportunities, supported by a contracted team (Eight Fifteen Impact) that provides strategic and project-based expertise, and executive support. This staffing model has allowed GRCC to maintain visibility, cultivate relationships, and advance select projects. However, it constrains the organization’s ability to deliver consistent, proactive, and measurable results at a scale that meets the vision of the GRCC Board and municipal partners. Achieving the desired level of impact will require targeted investments in people, processes, and programming — investments that not only strengthen the Greater Rockford Chamber of Commerce but also transform the community’s ability to respond effectively to opportunities and challenges shaping its economic future.

STRENGTHS

- Strong, multi-sector board provides effective governance and balanced leadership.
- GRCC is well-regarded and trusted within the community.
- New CEO brings fresh vision, renewed focus, and a clean slate for economic development programming.
- Active board and committees foster collaboration and can drive community problem-solving.

CHALLENGES

- One full-time staff member dedicated to economic development limits capacity.
- Key processes and SOPs were lost during the merger.
- Limited financial support from municipalities and public-sector partners.
- Overall, staff is relatively new to economic development as a discipline.

OPPORTUNITIES

- Evolving expectations of chambers and EDOs create an opportunity to future-proof the organization.
- Existing momentum, clear strategy, and measurable goals position the GRCC to expand its leadership in business retention, expansion and attraction work
- Municipalities are increasingly facing greater challenges with fewer resources, presenting a strong case for collaboration and public-private partnerships.

THREATS

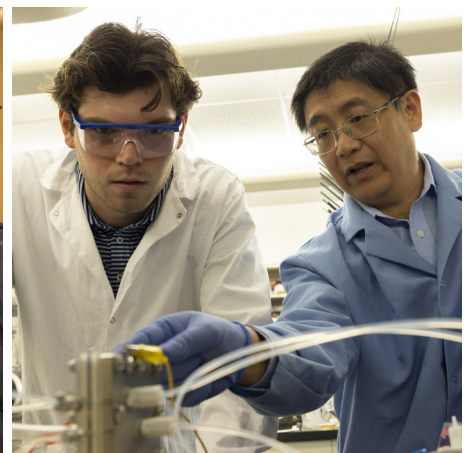
- Continued lack of municipal funding could further strain organizational capacity.
- Building economic development expertise may require recruiting talent from outside the region, creating both opportunity and risk.
- Clear outcome reporting, transparency, and strategic communication are essential to maintaining community trust and partner confidence.

ECONOMIC DEVELOPMENT PRIORITY FOCUS AREAS

Based on community and organizational assessments, Eight Fifteen Impact recommends **six strategic focus areas** to maximize regional economic impact. These priorities, developed and refined with input from GRCC's Economic Development Committee and regional stakeholders, were designed to minimize overlap with existing efforts while adding complementary capacity. They are **ordered by priority** based on potential impact, community need and the current capacity of the Greater Rockford Chamber of Commerce.

- 1. Organizational Development & Leadership**
- 2. Business Retention & Expansion (BRE)**
- 3. Marketing & Business Attraction**
- 4. Site Readiness Support**
- 5. Workforce Alignment & Talent Attraction**
- 6. Innovation**

While focused and prioritized around the most impactful opportunities, the goals and tactics that follow are designed to remain flexible and responsive to changing market conditions and emerging opportunities.



ECONOMIC DEVELOPMENT ACTION PLAN

<p style="text-align: center;">1</p> <p style="text-align: center;">Organization & Leadership</p>	<p style="text-align: center;">2</p> <p style="text-align: center;">Business Retention & Expansion</p>	<p style="text-align: center;">3</p> <p style="text-align: center;">Marketing & Business Attraction</p>
<p>Strengthen internal capacity and establish leadership in regional economic development.</p>	<p>Drive business expansion and retention, with civic engagement across the region.</p>	<p>Market the region as a competitive location for business with emphasis on targeted industries.</p>
<ul style="list-style-type: none"> • Build Organizational Capacity • Strengthen Community Trust and Engagement • Enhance Visibility of Economic Development and Successes • Grow Membership and Investment 	<ul style="list-style-type: none"> • Enhance BRE Visit Program • Support Existing Business Growth and Expansion • Create Opportunities for Industry Collaboration 	<ul style="list-style-type: none"> • Enhance Targeted Messaging and Branding • Drive Lead Generation and Outreach • Emphasize Digital Marketing and Strengthen Storytelling
<p style="text-align: center;">4</p> <p style="text-align: center;">Site Readiness Support</p>	<p style="text-align: center;">5</p> <p style="text-align: center;">Workforce Alignment & Talent Attraction</p>	<p style="text-align: center;">6</p> <p style="text-align: center;">Innovation</p>
<p>Collaborate in improving marketability of existing sites and help advance more sites toward readiness.</p>	<p>Enhance how businesses interact with workforce development resources and support talent attraction initiatives.</p>	<p>Collaborate with the region’s innovation leaders to amplify break-through ideas and technology.</p>
<ul style="list-style-type: none"> • Maintain Property Catalogs and Assessments • Advance Strategic Site Readiness in Partnership with Region 1 Planning Council 	<ul style="list-style-type: none"> • Increase Employer Engagement in Collaboration with Schools and The Workforce Connection • Enrich Local Leaders through Training and Development Programs • Promote Talent Attraction in Collaboration with GoRockford 	<ul style="list-style-type: none"> • Tell Region’s Innovation Story • Facilitate Collaboration among Region’s Innovation Partners • Strengthen Ecosystem and Access to Capital

DATA INSIGHTS



INDUSTRY ANALYSIS

The Rockford MSA's largest employment sectors are Manufacturing and Healthcare. The region is most specialized in Manufacturing, with a location quotient of 2.1, and Transportation and Warehousing, with a location quotient of 1.4, both exceeding national averages. However, the highest average wages in the region are concentrated in Management Firms and Finance rather than its dominant employment sectors.

Professional, Scientific, and Technical Services have a notably low location quotient of 0.33, well below the national average, which may be both a root cause and a symptom of gaps in educational attainment relative to national norms.

ROCKFORD MSA

NAICS Sector	Establishments	January Employment	February Employment	March Employment	Quarterly Wages	Avg. Weekly Wage	Location Quotient
NAICS 23 Construction	683	5,374	5,455	5,531	\$110,970,433	\$1,565	0.78
NAICS 31-33 Manufacturing	604	24,316	24,397	24,142	\$485,818,682	\$1,539	2.18
NAICS 44-45 Retail trade	889	15,116	14,926	14,945	\$143,494,630	\$736	1.11
NAICS 48-49 Transportation and warehousing	349	8,715	8,699	8,246	\$98,427,534	\$885	1.44
NAICS 51 Information	82	1,124	1,092	1,103	\$24,361,050	\$1,694	0.44
NAICS 52 Finance and insurance	310	2,763	2,704	2,726	\$67,118,994	\$1,891	0.49
NAICS 53 Real estate and rental and leasing	235	953	951	927	\$12,122,167	\$988	0.44
NAICS 54 Professional, scientific, and technical services	553	3,085	3,103	3,132	\$59,283,045	\$1,468	0.33
NAICS 55 Management of companies and enterprises	15	169	174	179	\$8,072,193	\$3,569	0.08
NAICS 56 Administrative, support, waste management and remediation services	393	8,595	8,721	8,905	\$92,801,399	\$817	1.15
NAICS 61 Educational services	81	1,607	1,652	1,670	\$13,971,900	\$654	0.57
NAICS 62 Health care and social assistance	608	24,462	24,380	24,465	\$422,724,359	\$1,331	1.22
NAICS 71 Arts, entertainment, and recreation	150	3,018	3,032	3,070	\$23,265,924	\$589	1.4
NAICS 72 Accommodation and food services	658	11,191	11,089	11,129	\$64,277,896	\$444	0.91
NAICS 81 Other services (except public administration)	620	3,937	3,893	3,931	\$39,435,400	\$774	0.96

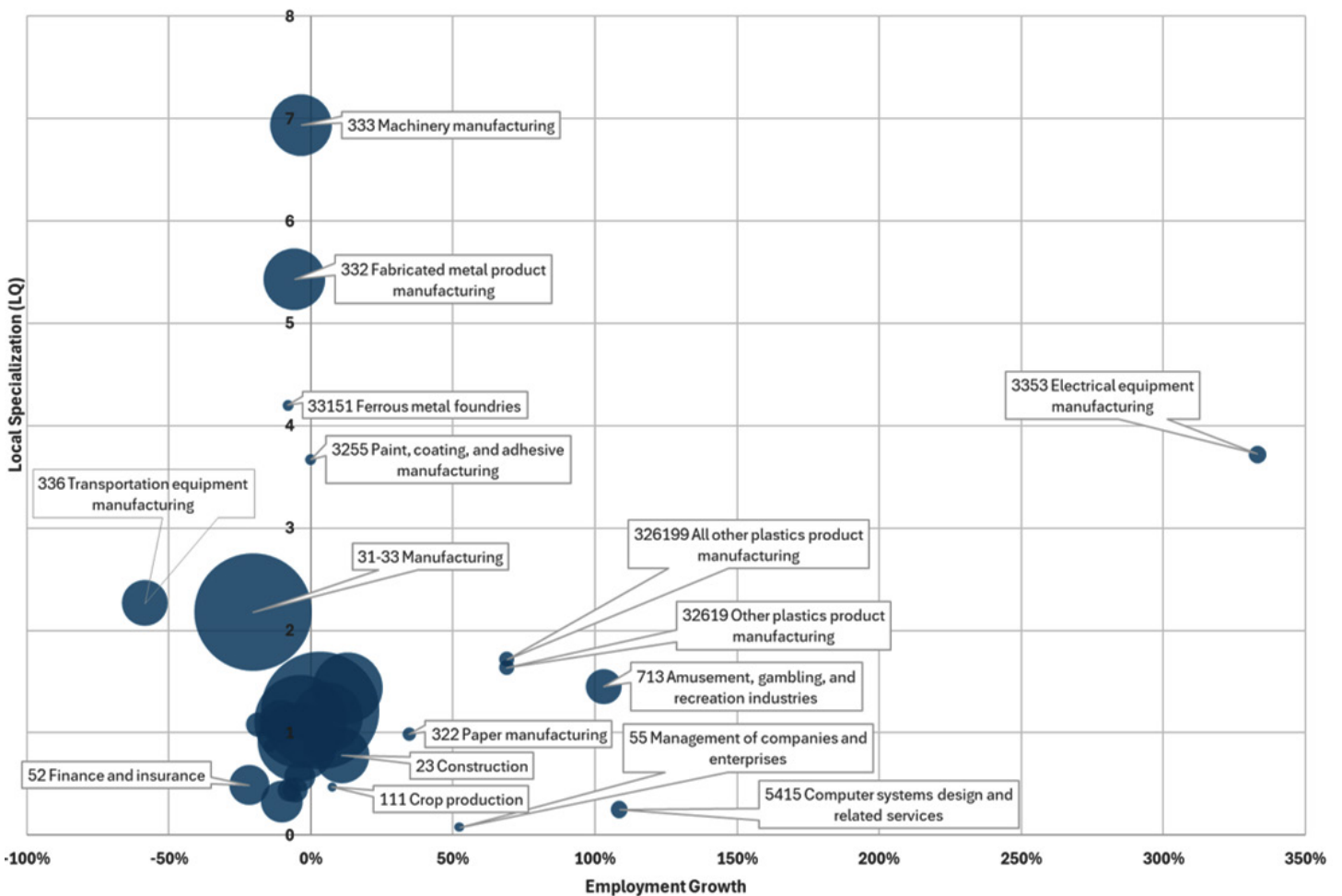
Location Quotient (LQ) measures how concentrated an industry is in a local economy compared to the national economy, where an LQ of 1.0 represents the national average, values above 1.0 indicate greater local specialization, and values below 1.0 indicate underrepresentation.

Source: BLS (QCEW, 2024)

INDUSTRY ANALYSIS

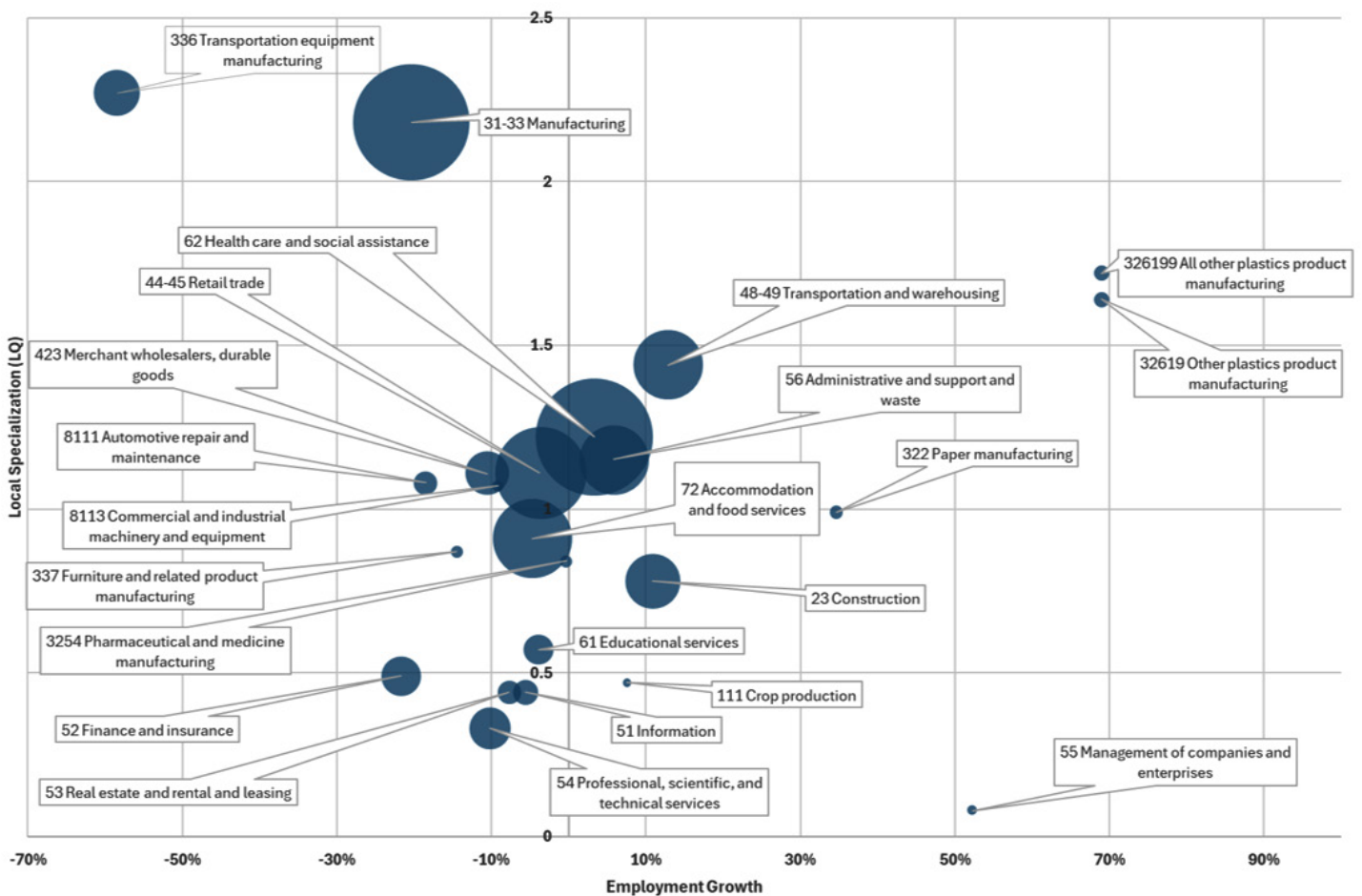
The bubble chart highlights Rockford industries by their performance since 2019. Industries positioned further right have experienced the most growth, those higher on the chart show greater local specialization, and larger bubbles represent higher employment levels.

- **Electrical Equipment Manufacturing** has experienced the strongest growth and is nearly four times more concentrated in the Rockford Region than the national average, though it represents a relatively small share of total employment.
- **Machinery Manufacturing and Fabricated Metal Products** remain highly concentrated in the Rockford MSA but have seen slight employment loss since 2019.
- **Plastics Manufacturing and Computer Systems Design** have grown since 2019 but maintain modest specialization and smaller employment footprints in the region.
- **Amusement, Gambling, and Recreation** doubled in size since 2019 and now accounts for a significant share of the region’s employment.



Source: BLS (QCEW, 2024)

- **Manufacturing** as a whole has lost nearly 20% of its employment since 2019, led by **Transportation Equipment Manufacturing**, which has seen a nearly 60% reduction in jobs.
- **Finance and Insurance** has experienced the second - largest employment decline since 2019.
- **Professional, Scientific, and Technical Services** employment has fallen by about 10% despite national growth in the sector – highlighting a need to examine the local factors driving this divergence.
- **Healthcare and Social Assistance** remains one of the region’s largest employment sectors and continues to experience robust growth, reflecting both its scale and sustained demand for services.

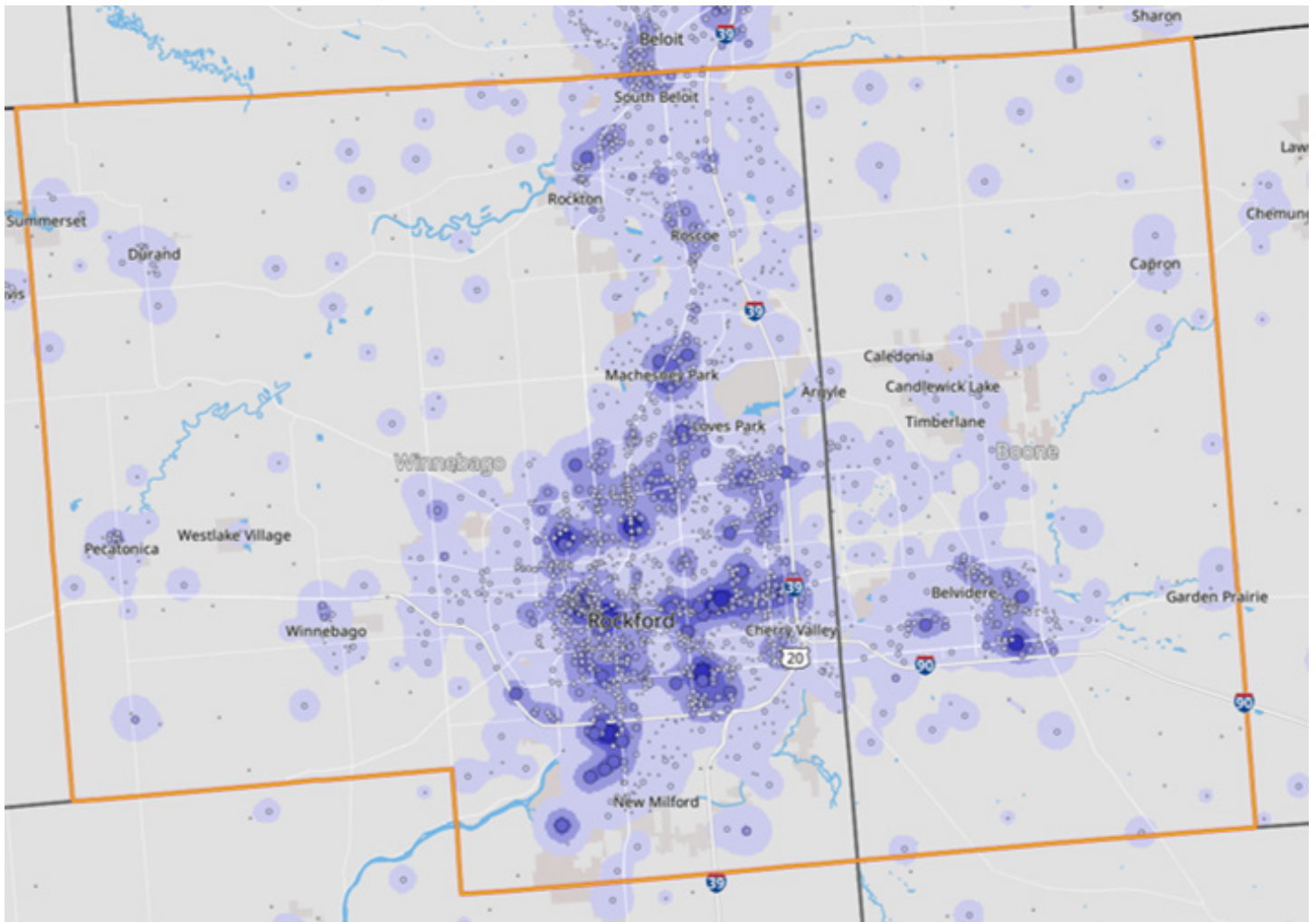


Source: BLS (QCEW, 2024)

LABORSHED SNAPSHOT

A Laborshed Snapshot provides insight into where a region’s workforce lives and how workers commute from home to their place of employment. Understanding these patterns is critical for evaluating labor availability, workforce accessibility, and the geographic reach of a region’s employment base. Laborshed analysis helps employers, site selectors, and policymakers assess business attraction potential, transportation needs, and the overall resilience of the regional labor market.

The map below illustrates the location of major employment hubs within the MSA and highlights where the majority of jobs are concentrated. The results show a heavy concentration of employment to the south and east of the City of Rockford’s center, along with additional dispersed employment centers to the north in Machesney Park and Loves Park. The map also highlights significant employment activity just east of Belvidere, underscoring the economic interdependence between Boone and Winnebago counties.

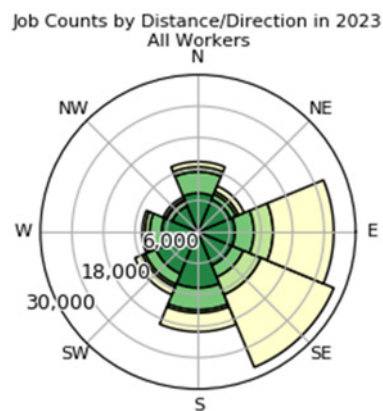


Source: U.S. Census, On the Map 2022

The following labor shed data illustrates where Rockford MSA residents live and their commuting patterns from home to work. With more than 126,000 residents employed in primary jobs, commuting data shows that 64% of workers in the region travel less than 25 miles to their place of employment with most traveling South, East and Southeast of their home.

ALL INDUSTRIES

Jobs by Distance - Home Census Block to Work Census Block		
2022		
	Count	Share
Total Private Primary Jobs	125,116	100%
Less than 10 miles	59,873	47.5%
10 to 24 miles	21,160	16.8%
25 to 50 miles	11,222	8.9%
Greater than 50 miles	33,860	26.8%



TRADE, TRANSPORTATION & UTILITIES

Jobs by Distance - Home Census Block to Work Census Block		
2022		
	Count	Share
Total Private Primary Jobs	31,257	100%
Less than 10 miles	11,197	35.8%
10 to 24 miles	3,975	12.7%
25 to 50 miles	3,374	10.8%
Greater than 50 miles	12,711	40.7%

In Trade and Transportation, there is a significant increase in the share of workers commuting more than 50 miles (40.7%), with the majority of these longer commutes extending south and southeast toward Chicago.

GOODS PRODUCING

Jobs by Distance - Home Census Block to Work Census Block		
2022		
	Count	Share
Total Private Primary Jobs	33,497	100%
Less than 10 miles	17,152	51.2%
10 to 24 miles	8,870	26.5%
25 to 50 miles	3,254	9.7%
Greater than 50 miles	4,221	12.6%

In the Manufacturing sector, far fewer residents commute more than 25 miles, with over 50% traveling less than 10 miles to work, signaling a strong concentration of local manufacturing job opportunities.

ALL OTHER SERVICES

Jobs by Distance - Home Census Block to Work Census Block		
2022		
	Count	Share
Total Private Primary Jobs	61,361	100%
Less than 10 miles	31,524	51.4%
10 to 24 miles	8,315	13.6%
25 to 50 miles	4,594	7.5%
Greater than 50 miles	16,928	27.6%

In the Services sector, a substantial 28.8% of residents commute more than 50 miles. This share increased from an estimated 16,928 workers in 2022 to nearly 18,000 in 2023, potentially reflecting continued growth in telecommuting and hybrid work arrangements.

Source: U.S. Census, On the Map 2022

PEER REGION COMPARISON

Selecting peer regions provides valuable context for understanding Rockford’s economic performance. Comparing data against similar regions helps ground local trends, highlight strengths, and identify areas for improvement.

The peer regions were chosen based on several carefully considered factors: proximity to a nearby major city, comparable population size, a strong manufacturing base, similar labor force participation rates, and comparable median household incomes. While not every factor aligns perfectly, the shared characteristics among these regions allow for meaningful comparisons and the differences help reveal what unique local conditions may be driving distinct economic outcomes.

MSA Name	Population	Nearby Major City	Drive Time to Major City	Labor Force	Labor Force Participation	Median HH Income	Unemployment Rate (March 2025)	Manufacturing Employment
Rockford, IL	336,605	Chicago, IL	~1.5 hrs	168,057	63.3%	\$66,960	5.0%	20.5%
South Bend -Mishawaka, IN-MI	324,000	Chicago, IL	~1.5 hrs	163,747	62.9%	\$65,834	4.1%	19.0%
Kalamazoo -Portage, MI	261,437	Detroit, MI	~2 hr	141,627	66.5%	\$67,191	4.9%	17.8%
Peoria, IL	365,773	Bloomington, IL	~1 hr	181,389	62.9%	\$68,504	4.4%	15.0%
Evansville, IN-KY	269,721	Louisville, KY	~2 hrs	137,243	62.8%	\$90,340	3.1%	17.8%
Davenport -Moline -Rock Island, IA-IL	381,864	Des Moines, IA	~2.5 hrs	194,748	63.9%	\$71,262	4.60%	18%

Source: ACS 1-Year (2023); BLS March 2025 (Unemployment)

Peer City Recommendations
 Comparable Selection Factor

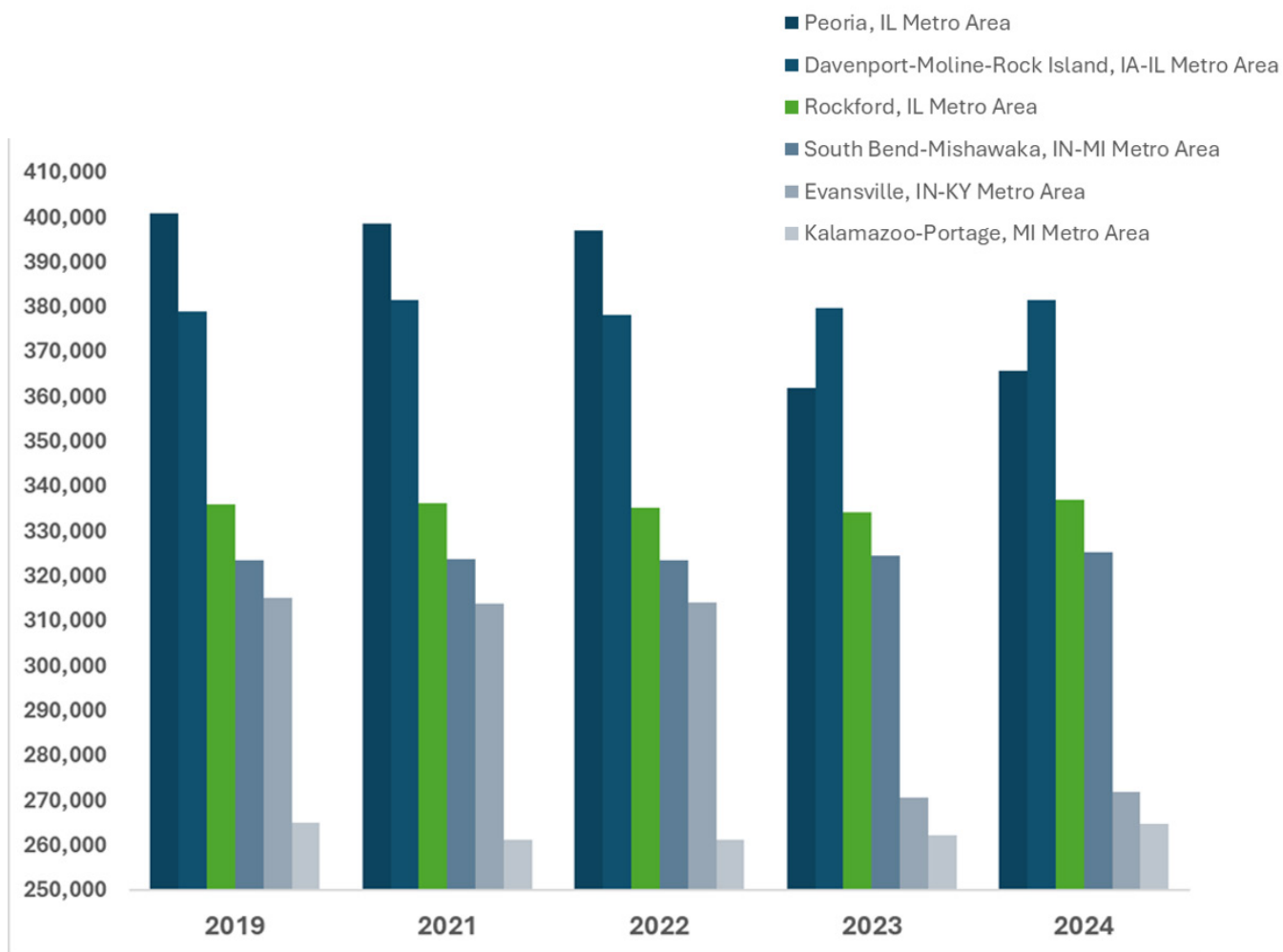


POPULATION GROWTH

Comparing population trends over the past several years provides insight into economic resilience and the lasting effects of COVID-19 on peer regions. Peoria, Illinois, historically the largest in this cohort, has experienced a gradual long-term decline in population, moving it from first to second in total population relative to its peers. Evansville, Indiana exhibits a similar pattern, with steady, modest population decreases over time rather than a sharp short-term loss.

These trends may reflect broader economic pressures, including shifts in local industries, labor markets, and migration patterns following the pandemic. In contrast, the populations of the Quad Cities, Rockford, South Bend, and Kalamazoo have remained relatively stable, reflecting more consistent growth patterns.

Rockford’s population stability, in particular, highlights its economic resilience and diversification, notably in advanced manufacturing, aerospace, and logistics. Strength in the local labor and housing markets may make the region more attractive to businesses seeking a stable workforce and to residents valuing consistent cost of living and community amenities.



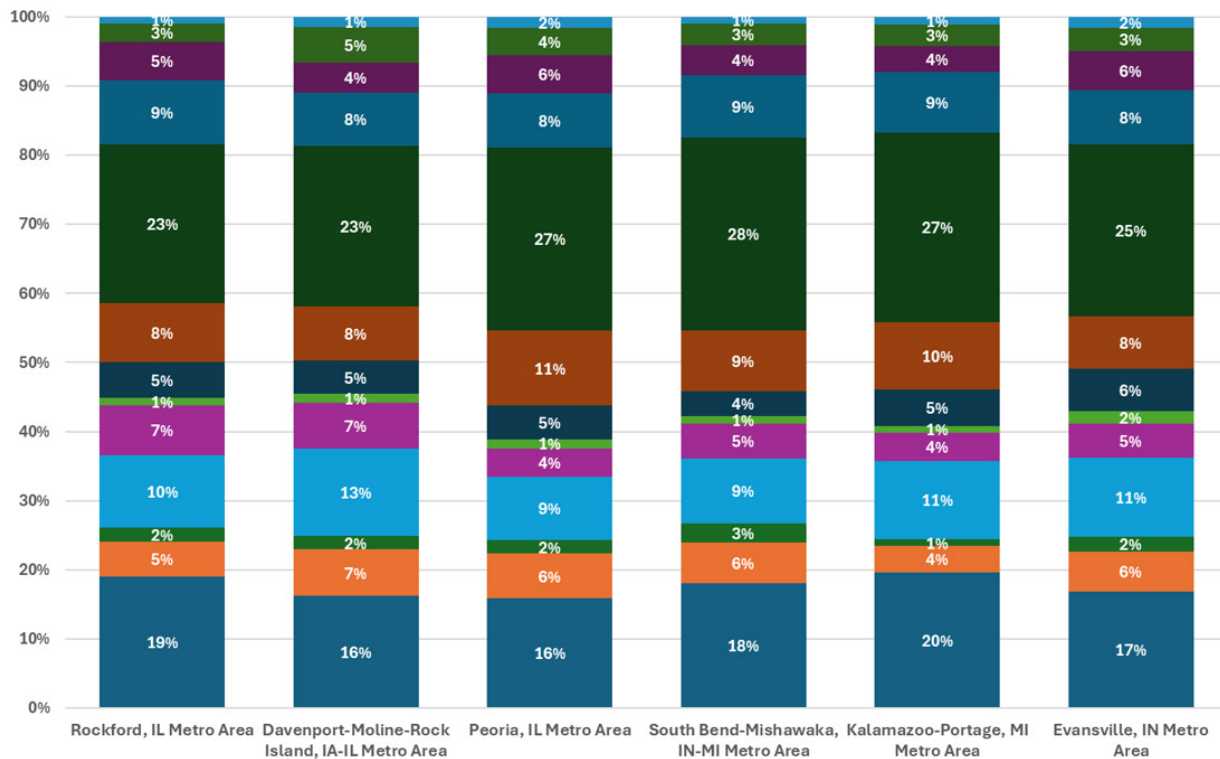
Source: ACS 1-Year Estimates

ECONOMIC PROFILE - INDUSTRY MIX

The Rockford MSA's industry mix is highly comparable to that of its peer regions and was a primary factor in selecting the cohort for comparison. Rockford is a leader in Manufacturing and Transportation and Warehousing, which together account for 26 percent of total employment. Professional, Scientific, and Management industries represent one of the smallest employment shares among the peer regions, while Peoria and Kalamazoo rank among the highest. Notably, Peoria and Kalamazoo also rank highest in educational attainment, suggesting a strong relationship between industry composition and workforce education levels.

From a competitive positioning standpoint, Rockford's strength in advanced manufacturing and logistics provides a strong foundation to attract and grow higher-value professional and technical services that support these industries. Targeted investments in talent development, education, and business attraction could help the region capture more of this value-added activity, diversify its employment base, and improve long-term wage growth while building on existing industry advantages.

- Agriculture, forestry, fishing and hunting, and mining
- Public administration
- Other services, except public administration
- Arts, entertainment, and recreation, and accommodation and food services
- Educational services, and health care and social assistance
- Professional, scientific, and management, and administrative and waste management services
- Finance and insurance, and real estate and rental and leasing
- Information
- Transportation and warehousing, and utilities
- Retail trade
- Wholesale trade
- Construction
- Manufacturing

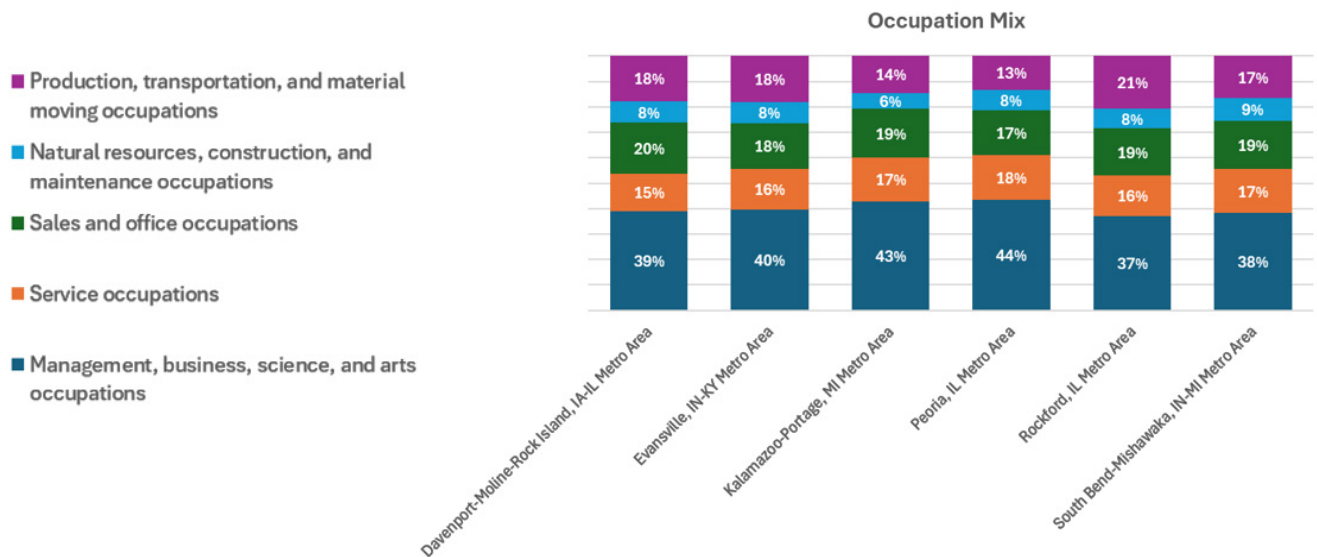


Source: ACS 1-Year Estimates 2023

ECONOMIC PROFILE - OCCUPATIONAL MAKEUP

Rockford’s occupational makeup closely mirrors its industry mix, with Production, Transportation, and Material Moving occupations leading among the region’s peers. However, a deeper look at 10-year U.S. growth projections reveals that Production occupations are among the lowest-growth categories, projected to decline by 1.1%. In contrast, Management occupations, an area where Rockford currently under-indexes, are expected to grow by 6.6%, one of the highest growth rates nationally.

Additionally, Healthcare Practitioners and Support occupations rank among the top three fastest-growing occupation groups. Notably, healthcare is already one of Rockford’s largest and most specialized local industries, highlighting both a strong current presence and future growth opportunities.



2024 National Employment Matrix Title	National Employment Matrix Code	Employment 2024	Employment 2034	Employment Change 2024-34	Change Percent 2024-34	Median Annual Wage 2024
Healthcare support occupations	31-0000	7,982.8	8,971.1	988.3	12.4	37,180
Computer and mathematical occupations	15-0000	5,416.7	5,962.3	545.6	10.1	105,850
Healthcare practitioners and technical occupations	29-0000	10,067.5	10,794.4	726.9	7.2	83,090
Community and social service occupations	21-0000	3,196.9	3,409.2	212.3	6.6	57,530
Management occupations	11-0000	13,607.6	14,441.0	833.4	6.1	122,090
Architecture and engineering occupations	17-0000	2,648.4	2,788.3	139.9	5.3	97,310
Business and financial operations occupations	13-0000	11,262.0	11,848.9	586.9	5.2	80,920
Construction and extraction occupations	47-0000	7,574.7	7,968.8	394.1	5.2	58,360
Life, physical, and social science occupations	19-0000	1,609.5	1,690.4	80.9	5.0	78,980
Installation, maintenance, and repair occupations	49-0000	6,492.9	6,794.3	301.4	4.6	58,230
Personal care and service occupations	39-0000	4,464.1	4,650.6	186.5	4.2	35,110
Transportation and material moving occupations	53-0000	14,204.6	14,784.4	579.9	4.1	42,740
Food preparation and serving related occupations	35-0000	13,805.3	14,295.3	489.9	3.5	34,130
Total, all occupations	00-0000	169,956.1	175,167.9	5,211.8	3.1	49,500
Arts, design, entertainment, sports, and media occupations	27-0000	3,021.1	3,104.6	83.5	2.8	60,140
Legal occupations	23-0000	1,418.2	1,456.5	38.3	2.7	99,990
Building and grounds cleaning and maintenance occupations	37-0000	5,715.9	5,832.9	117.1	2.0	36,790
Protective service occupations	33-0000	3,787.4	3,816.6	29.1	0.8	50,580
Educational instruction and library occupations	25-0000	9,813.2	9,875.4	62.2	0.6	59,220
Production occupations	51-0000	9,001.2	8,901.6	-99.6	-1.1	45,960
Sales and related occupations	41-0000	14,532.6	14,234.8	-297.8	-2.0	37,460
Farming, fishing, and forestry occupations	45-0000	1,008.5	983.3	-25.2	-2.5	36,750
Office and administrative support occupations	43-0000	19,325.2	18,563.3	-761.9	-3.9	46,320

Source: Employment Projections program, U.S. Bureau of Labor Statistics

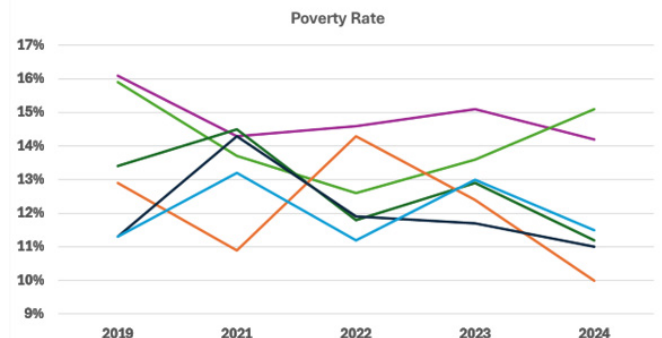
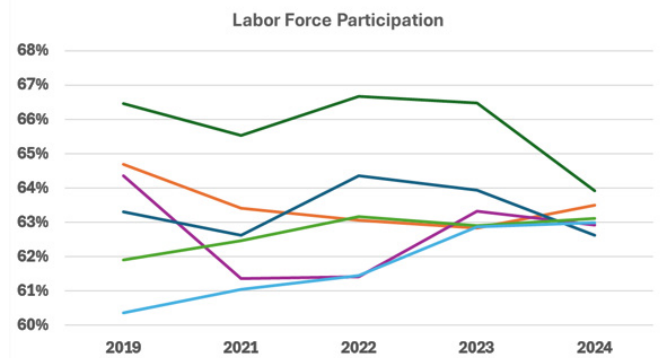
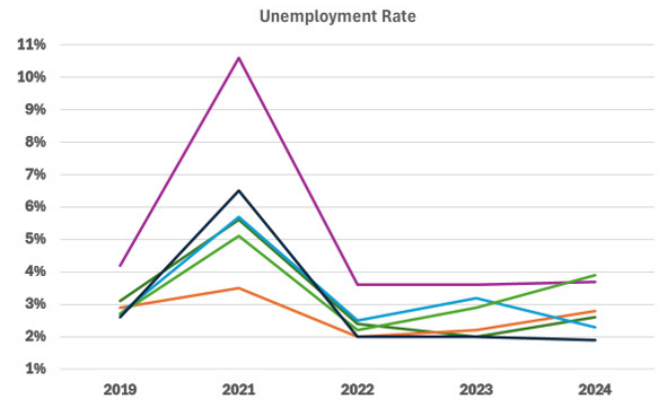
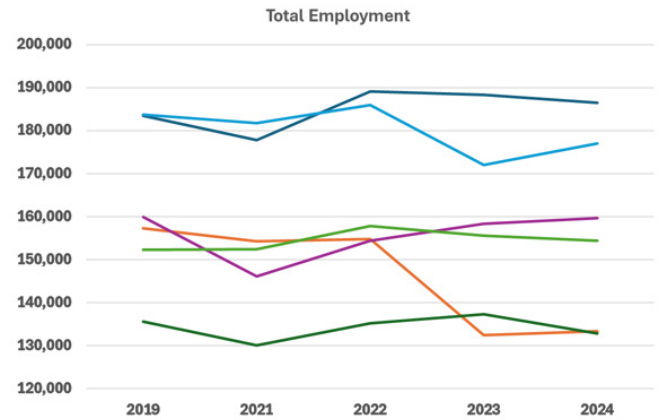
ECONOMIC PROFILE - LABOR MARKET

Rockford’s total employment declined by nearly 15,000 jobs following the onset of the Covid-19 pandemic but returned to pre-pandemic levels by 2024. Despite this temporary employment loss, the poverty rate declined by approximately 1.5 percentage points and continues to trend below pre-pandemic levels.

Unemployment increased sharply during the pandemic but fell to below pre-pandemic levels by 2022. However, structural unemployment in the Rockford MSA remains elevated relative to peer regions, indicating persistent challenges in aligning workforce skills with available jobs. At the same time, labor force participation declined from approximately 64.5 percent and had not fully recovered as of 2024, standing at roughly 63 percent.

Taken together, these trends suggest that recent labor market recovery has been driven more by shifts in workforce composition and wage levels among those employed than by broad-based re-engagement of the labor force. While employment levels have recovered, improving labor force participation and reducing structural unemployment will be critical to sustaining inclusive growth and expanding economic opportunity across the region.

- Davenport-Moline-Rock Island, IA-IL Metro Area
- Evansville, IN-KY Metro Area
- Kalamazoo-Portage, MI Metro Area
- Peoria, IL Metro Area
- Rockford, IL Metro Area
- South Bend-Mishawaka, IN-MI Metro Area



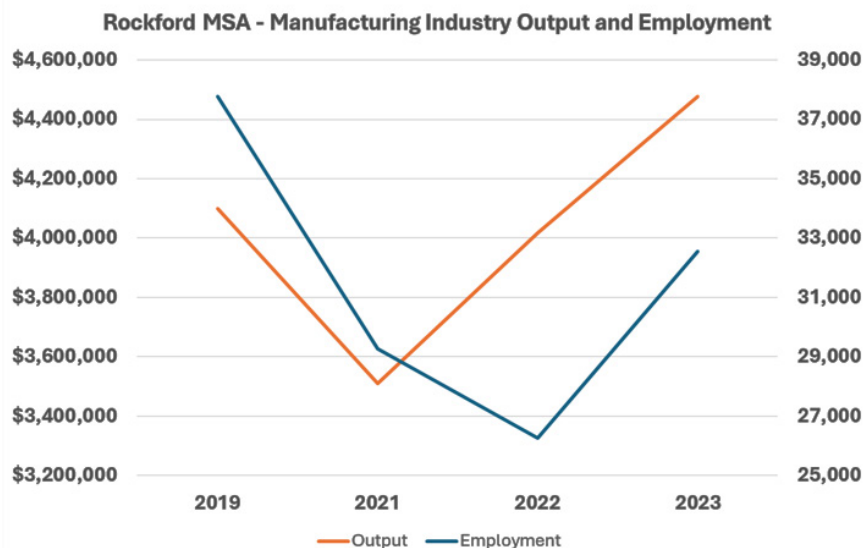
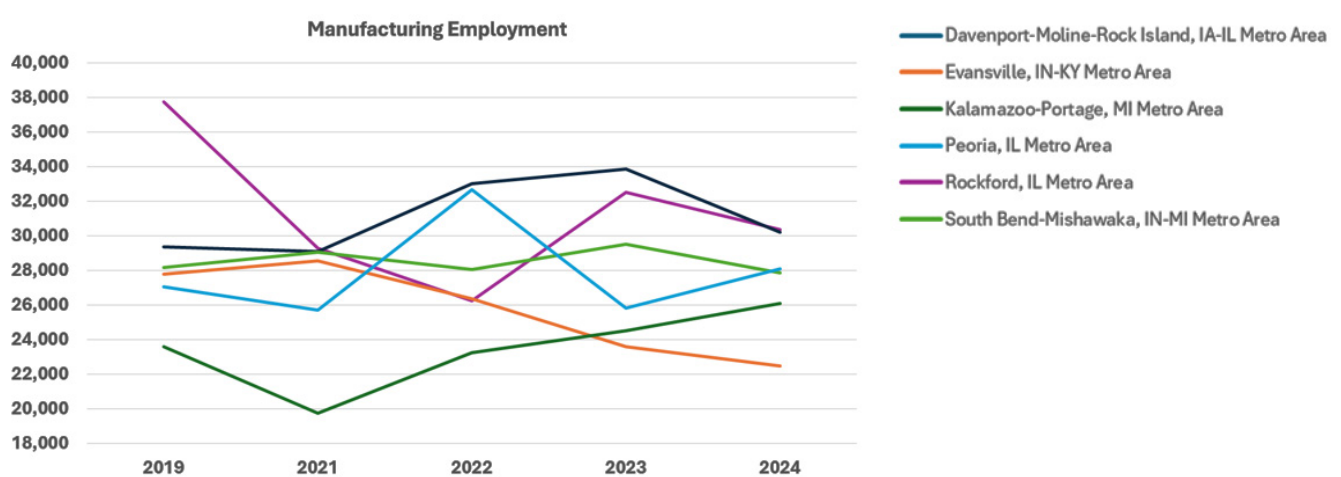
Source: ACS 1-Year Estimates 2023

ECONOMIC PROFILE - MANUFACTURING

While total employment in Rockford has returned to pre-pandemic levels, manufacturing employment, long the economic foundation of the region, has not fully recovered. At the same time, manufacturing output has surpassed 2019 levels, continuing a decades-long trend of rising productivity that mirrors both regional and national patterns.

With targeted focus and investment, Rockford can continue to be a place where U.S. manufacturing thrives. However, the long-term outlook suggests that a more intentional approach to attracting and expanding industries that are growing nationally will be necessary to complement manufacturing strength, diversify the employment base, and support sustained economic growth.

Manufacturing output in Rockford rebounded quickly following 2021 and has far outpaced employment gains, reflecting strong economic resilience and sustained investment in productivity. This divergence between output and employment is consistent with long-term trends in the manufacturing sector, where automation, advanced technologies, and process improvements have enabled firms to produce more with fewer workers. While this dynamic reinforces Rockford’s role as a competitive manufacturing center, it also underscores the importance of aligning workforce development and economic development strategies to ensure that productivity gains translate into broader employment opportunities and long-term regional prosperity.



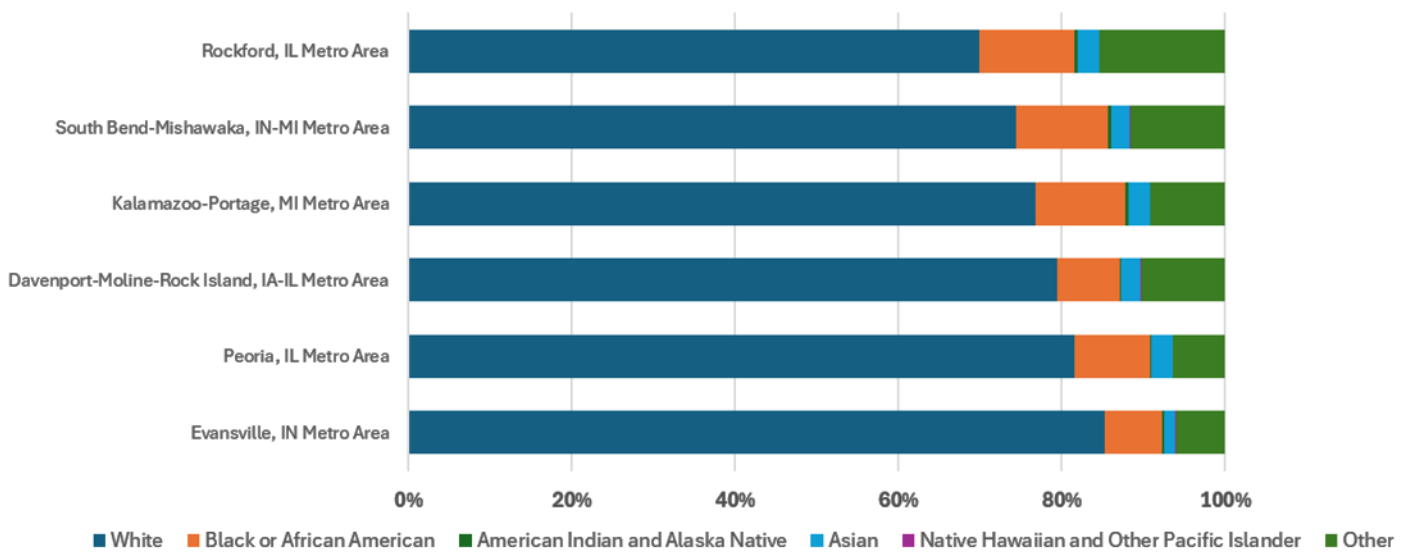
Source: BLS (Employment), BEA (Economic Output)

DIVERSITY

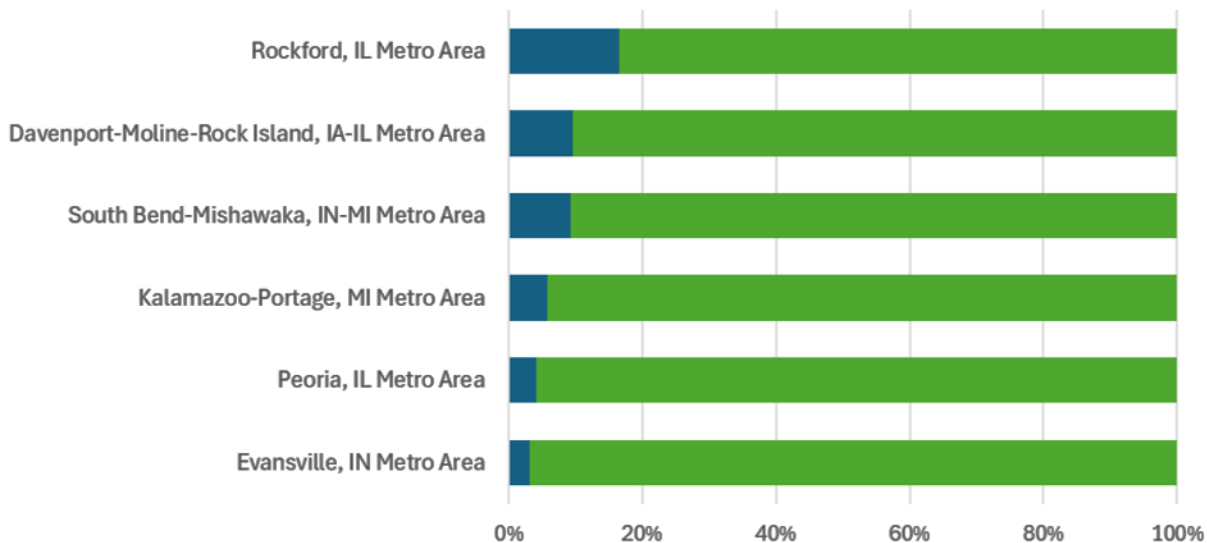
Rockford’s population diversity stands out among peer regions, offering a broad mix of backgrounds, and perspectives that support innovation and business growth. This diversity strengthens the local labor market, enhances workforce adaptability, and provides economic developers with a diverse pool of talent to attract and retain businesses.

A diverse community often signals inclusivity, vibrancy, and opportunity, qualities that make a region more attractive to highly skilled professionals considering relocation. Companies located in such communities can draw top talent from outside the region because prospective employees are more likely to move to areas where they feel welcomed, represented, and connected.

Racial Diversity



Hispanic Population



Source: ACS 5-Year Estimates 2023

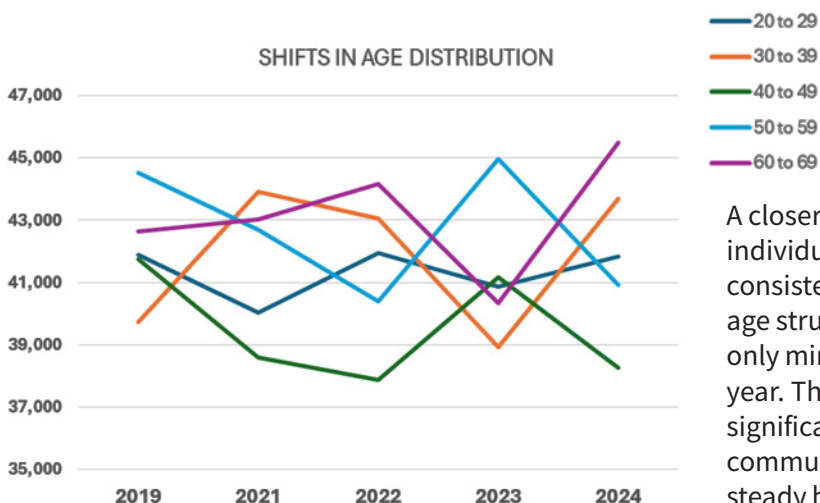
AGE DISTRIBUTION

With a U.S. median age of 39.2, Rockford aligns closely with the national average and sits near the middle among its peer regions. In comparison, South Bend and Kalamazoo show lower median ages, primarily influenced by large college populations, ages which temporarily skew their demographics younger. Rockford's position suggests a balanced population mix of working-age adults and retirees, which can appeal to employers seeking a stable, experienced workforce while still providing access to younger talent.

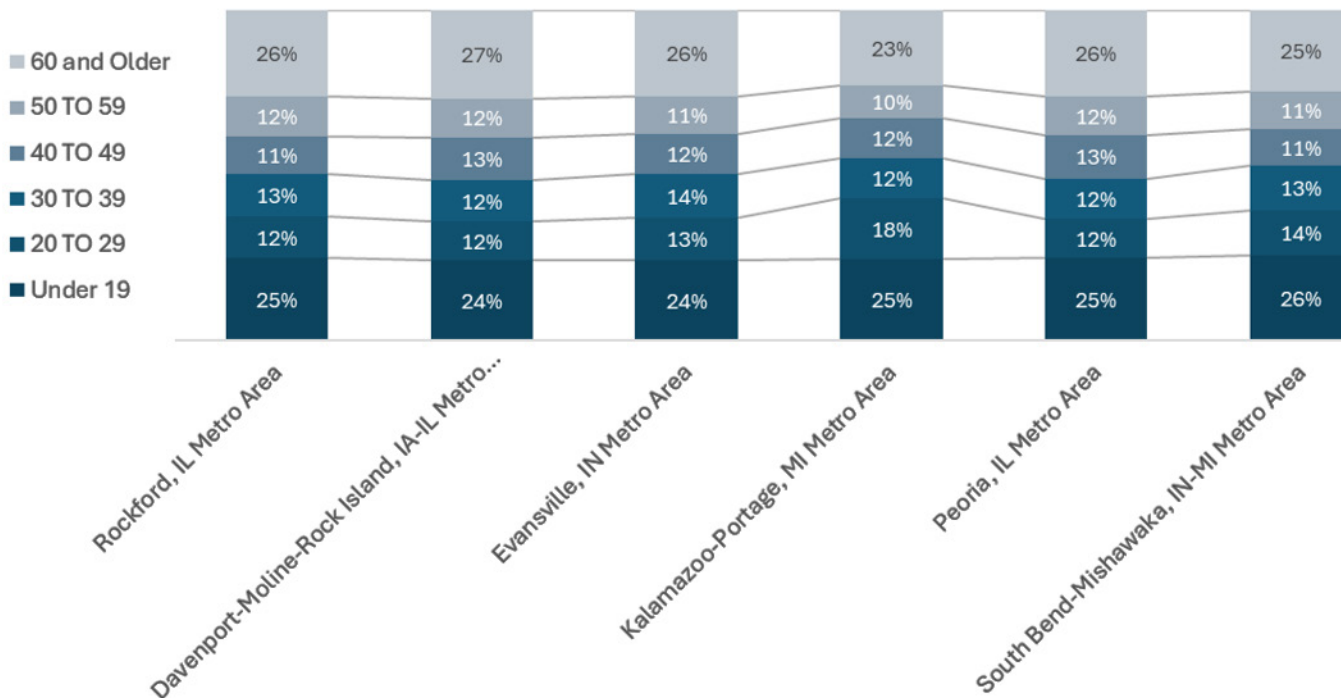
Median Age (years)

Davenport-Moline-Rock Island, IA-IL Metro Area	40.9
Peoria, IL Metro Area	40.7
Evansville, IN Metro Area	39.6
Rockford, IL Metro Area	39.6
South Bend-Mishawaka, IN-MI Metro Area	37.8
Kalamazoo-Portage, MI Metro Area	35.5

SHIFTS IN AGE DISTRIBUTION



A closer examination of age distribution across individual age groups reveals no clear or consistent trends. Overall, the population's age structure remains relatively stable, with only minor fluctuations observed from year to year. These slight variations do not indicate any significant demographic shifts, suggesting that the community's age composition has maintained a steady balance over the period analyzed.



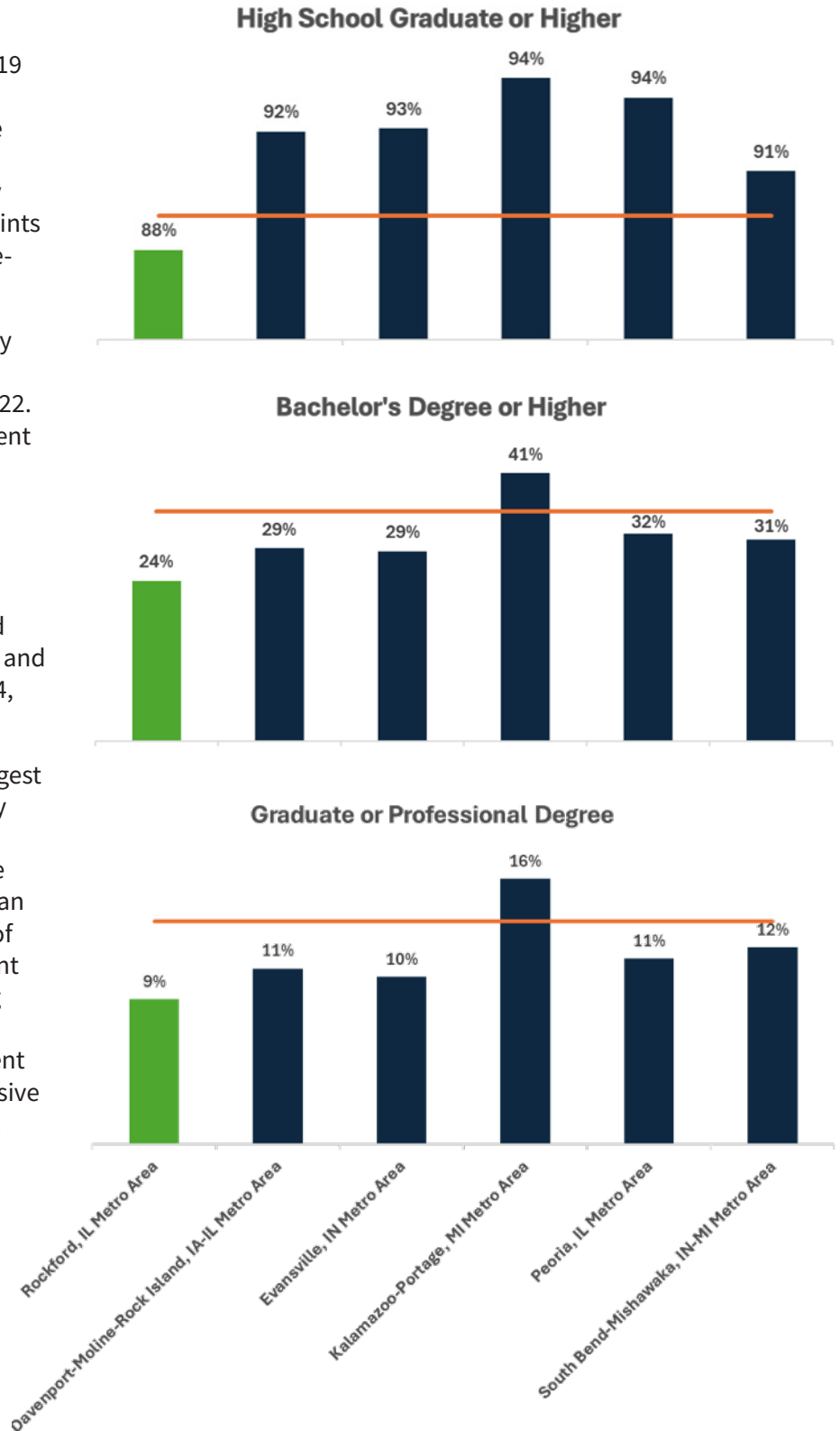
Source: ACS 1-Year Estimates 2023

EDUCATIONAL ATTAINMENT

Rockford's total employment declined by nearly 15,000 jobs following the onset of the Covid-19 pandemic but returned to pre-pandemic levels by 2024. Despite this temporary employment loss, the poverty rate declined by approximately 1.5 percentage points and continues to trend below pre-pandemic levels.

Unemployment increased sharply during the pandemic but fell to below pre-pandemic levels by 2022. However, structural unemployment in the Rockford MSA remains elevated relative to peer regions, indicating persistent challenges in aligning workforce skills with available jobs. At the same time, labor force participation declined from approximately 64.5 percent and had not fully recovered as of 2024, standing at roughly 63 percent.

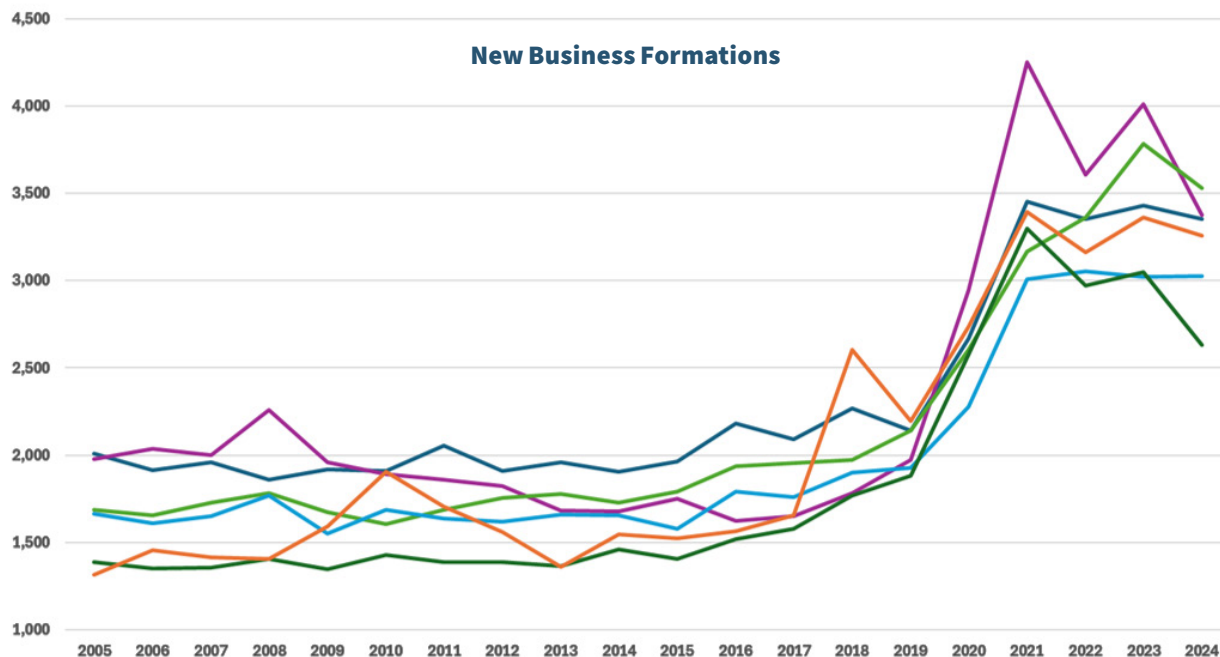
Taken together, these trends suggest that recent labor market recovery has been driven more by shifts in workforce composition and wage levels among those employed than by broad-based re-engagement of the labor force. While employment levels have recovered, improving labor force participation and reducing structural unemployment will be critical to sustaining inclusive growth and expanding economic opportunity across the region.



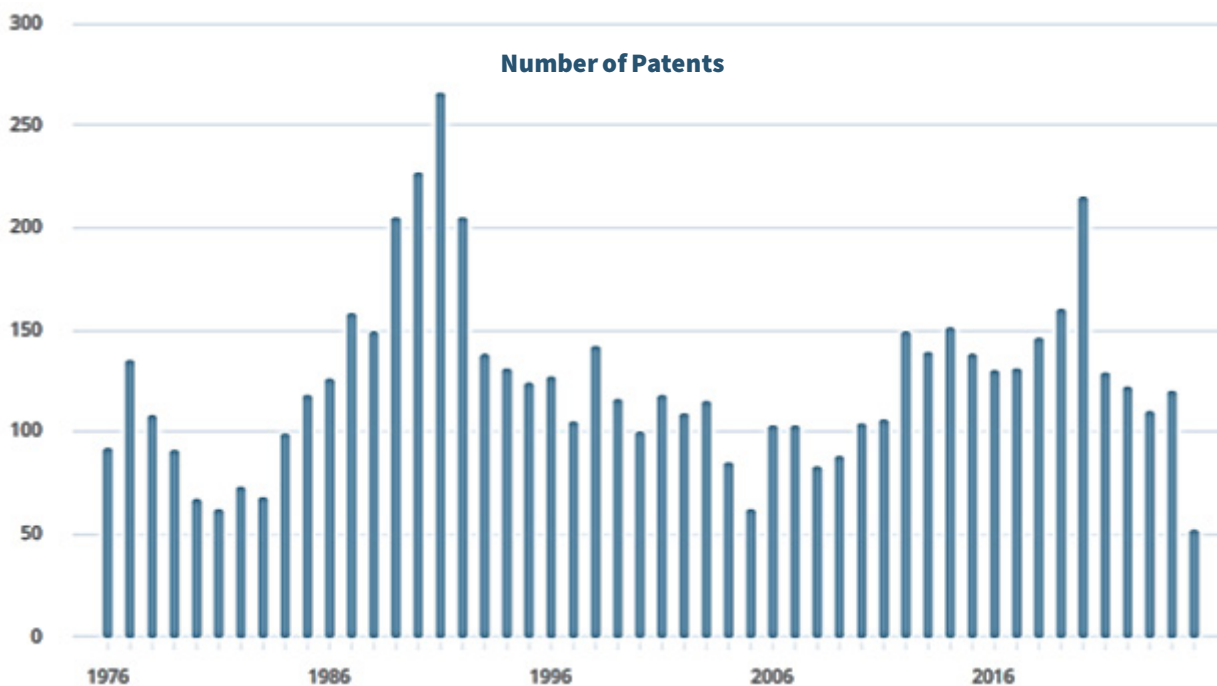
Source: ACS 5-Year Estimates 2023

INNOVATION

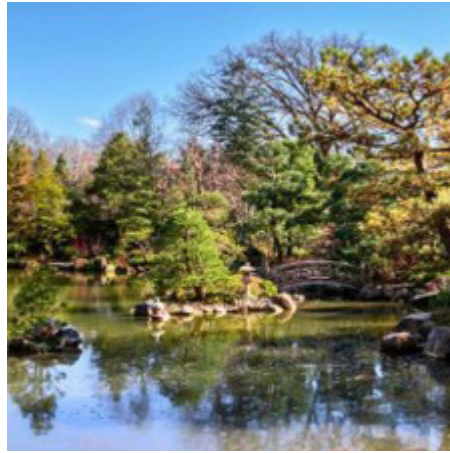
Rockford has strong entrepreneurial energy, ranking among the top peer regions for new business formations, with startups roughly doubling since 2019. This growth drives job creation, diversifies the economy, and attracts investment. However, the number of patents filed has declined since 2019, indicating underperformance in high-tech innovation. Economic development efforts could focus on supporting technology commercialization, intellectual property development, and collaboration between businesses and universities to strengthen both the quantity and quality of new ventures.



Source: U.S. Census Bureau



Source: U.S. PTO



Thoughts from the Consulting Team

Our team remains inspired by the dedication and energy of the stakeholders who contributed to this process. This roadmap does not represent every strategy that could or even should be pursued. Rather, it is a tactical plan – a set of data-informed strategies prioritized based on potential impact, the current and near-future capacity of GRCC and its partners, and a realistic pathway to implementation.

The time horizon for this plan is not 20 years, rather, it is 20 months. This GRCC Economic Development Roadmap is focused, actionable, and designed to build momentum. More than a list of strategies, it reflects the region’s shared commitment to growth, collaboration, and progress. The insights and recommendations within are intended to guide partners toward a more resilient, inclusive, and opportunity-rich economy. Moving forward will require continued alignment, accountability, and a willingness to adapt. The foundation, however, is strong. With clear direction and a unified approach, the region is well-positioned to turn its vision into measurable results.

ABOUT EIGHT FIFTEEN IMPACT

Eight Fifteen Impact is a consulting team dedicated to empowering governments, non-profits, and public-private partnerships through impact-driven consulting. With a combined 30 plus years of experience in economic development and community planning, we help organizations design and implement strategic initiatives that drive economic development, strengthen communities, and accelerate sustainable growth.

Contracted to develop an updated Economic Development Strategy for the Greater Rockford Chamber of Commerce, Eight Fifteen Impact is now a key resource for the organization’s Business Recruitment and Expansion team.



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