

Pickaway County economic and background assessment

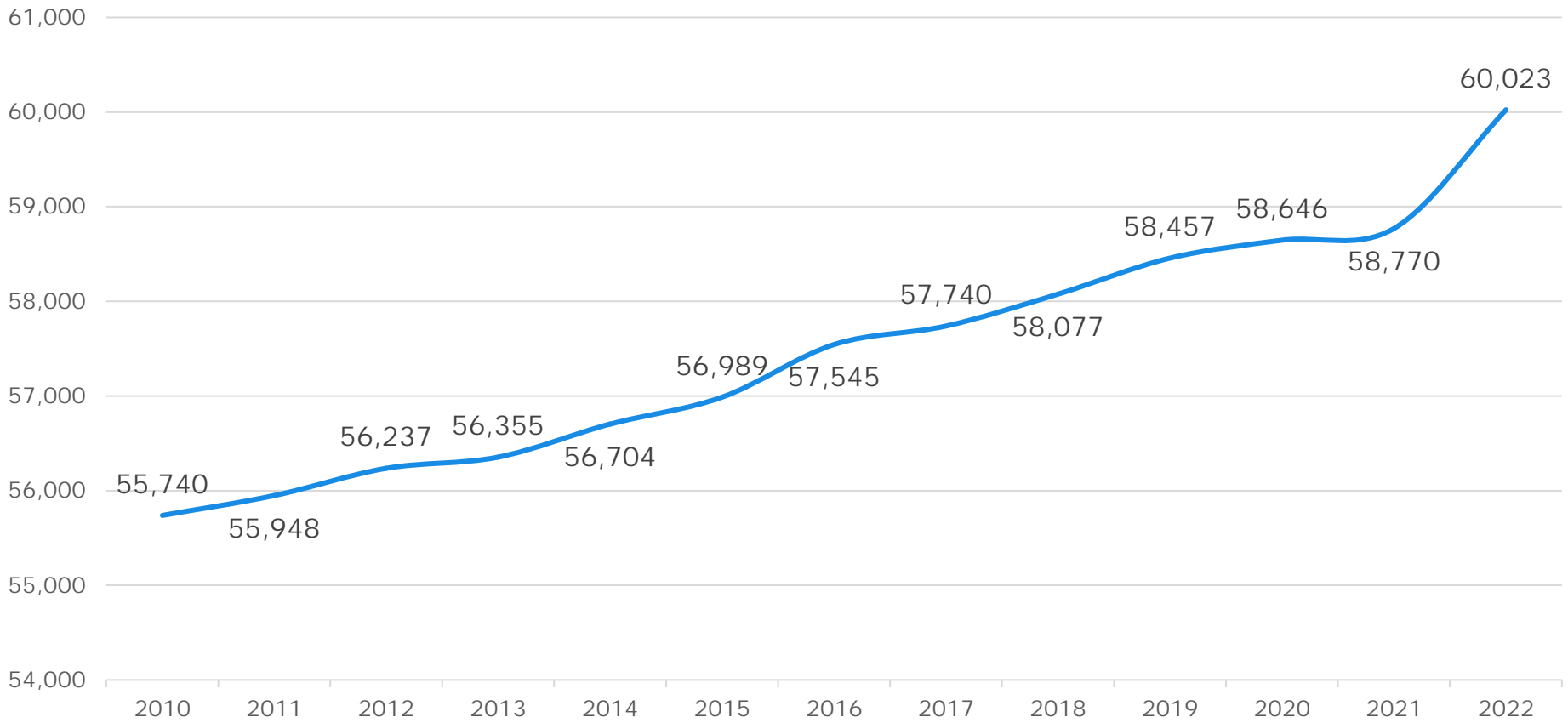
Prepared for: South Central Ohio
Workforce Partnership

July, 2023



Population

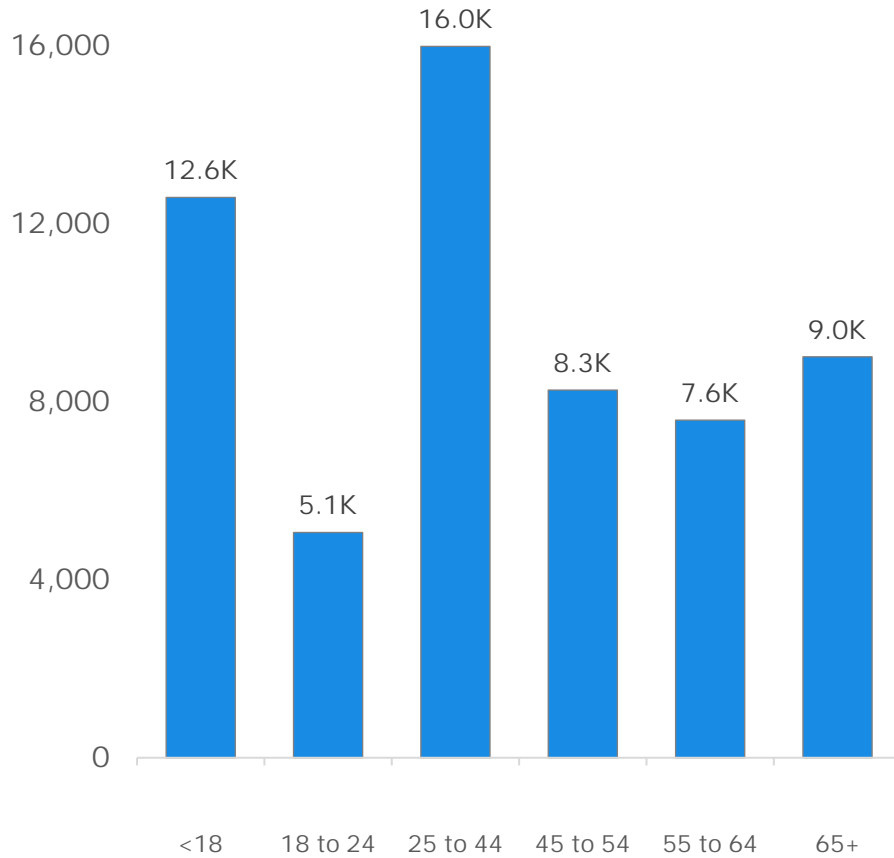
Population for Pickaway County, 2010 - 2022



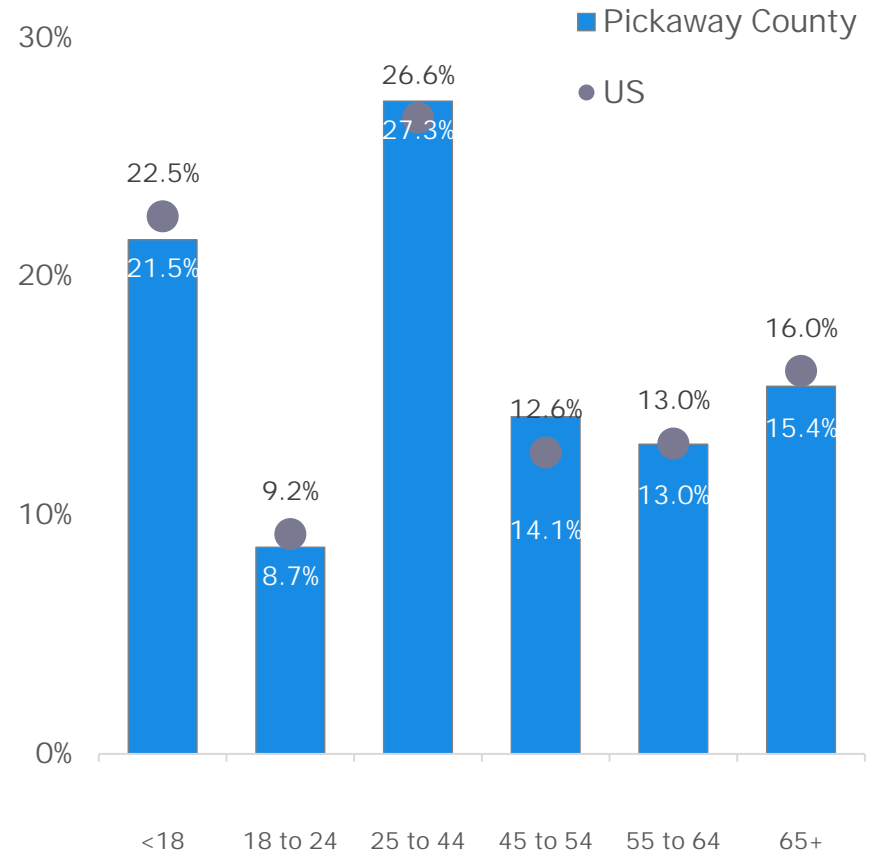
Source: US Census Bureau

Population by age

Population by age cohort, 2021



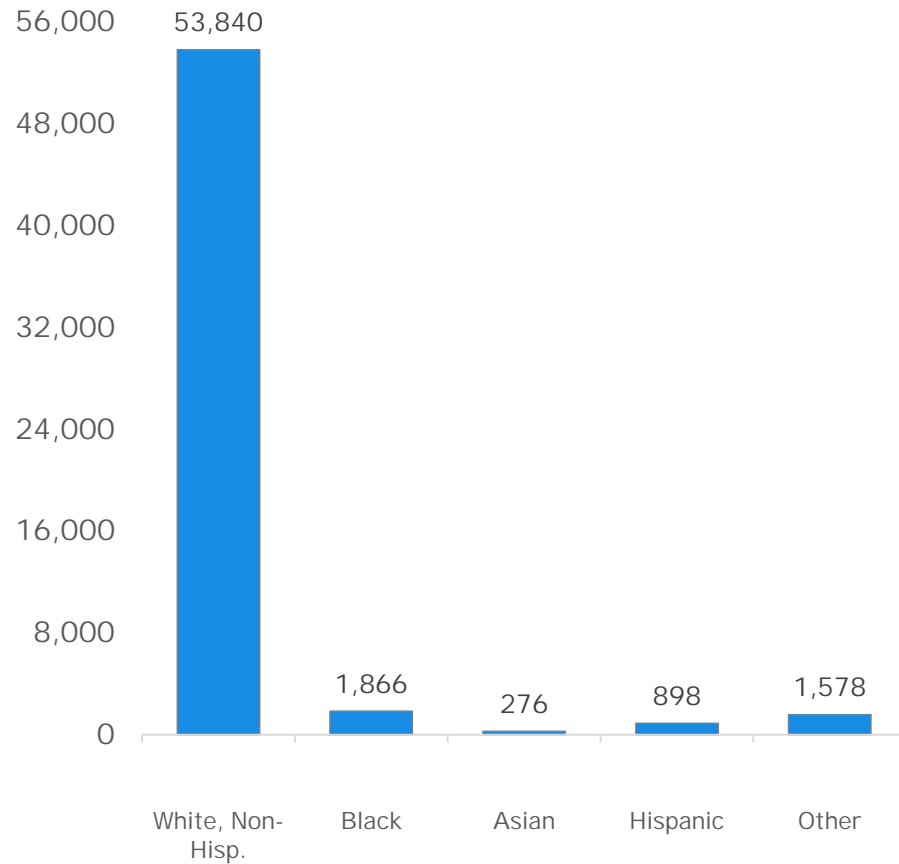
Share of population by age cohort, 2021



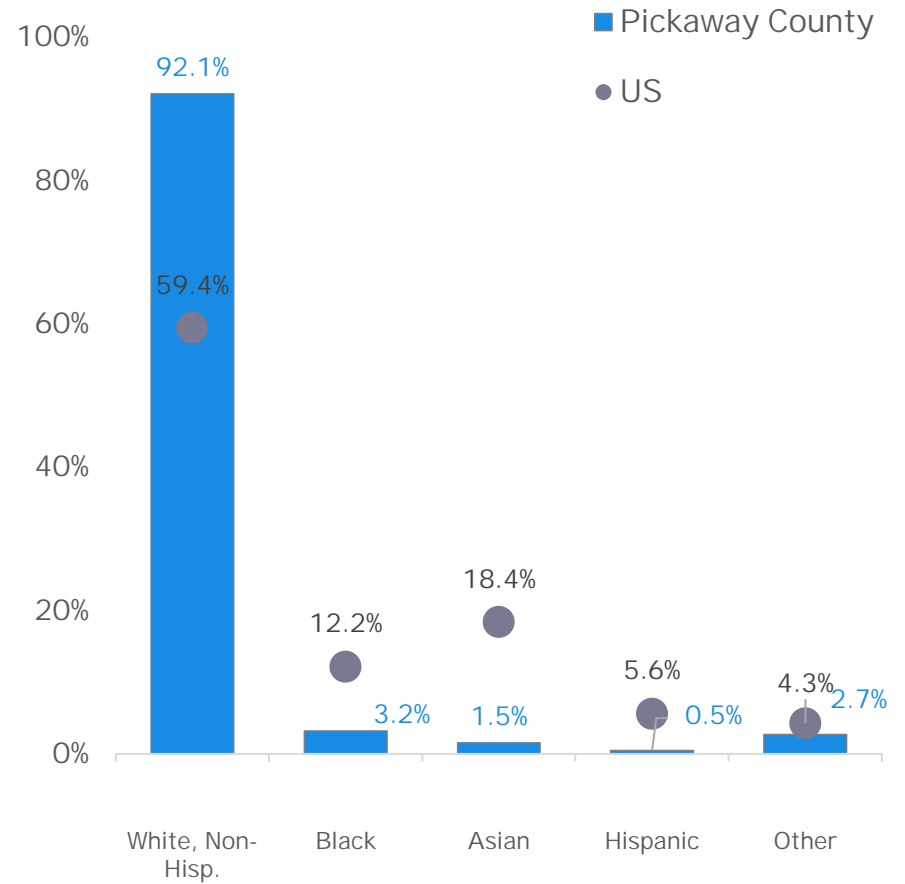
Source: US Census Bureau

Population by race

Population by race cohort, 2021



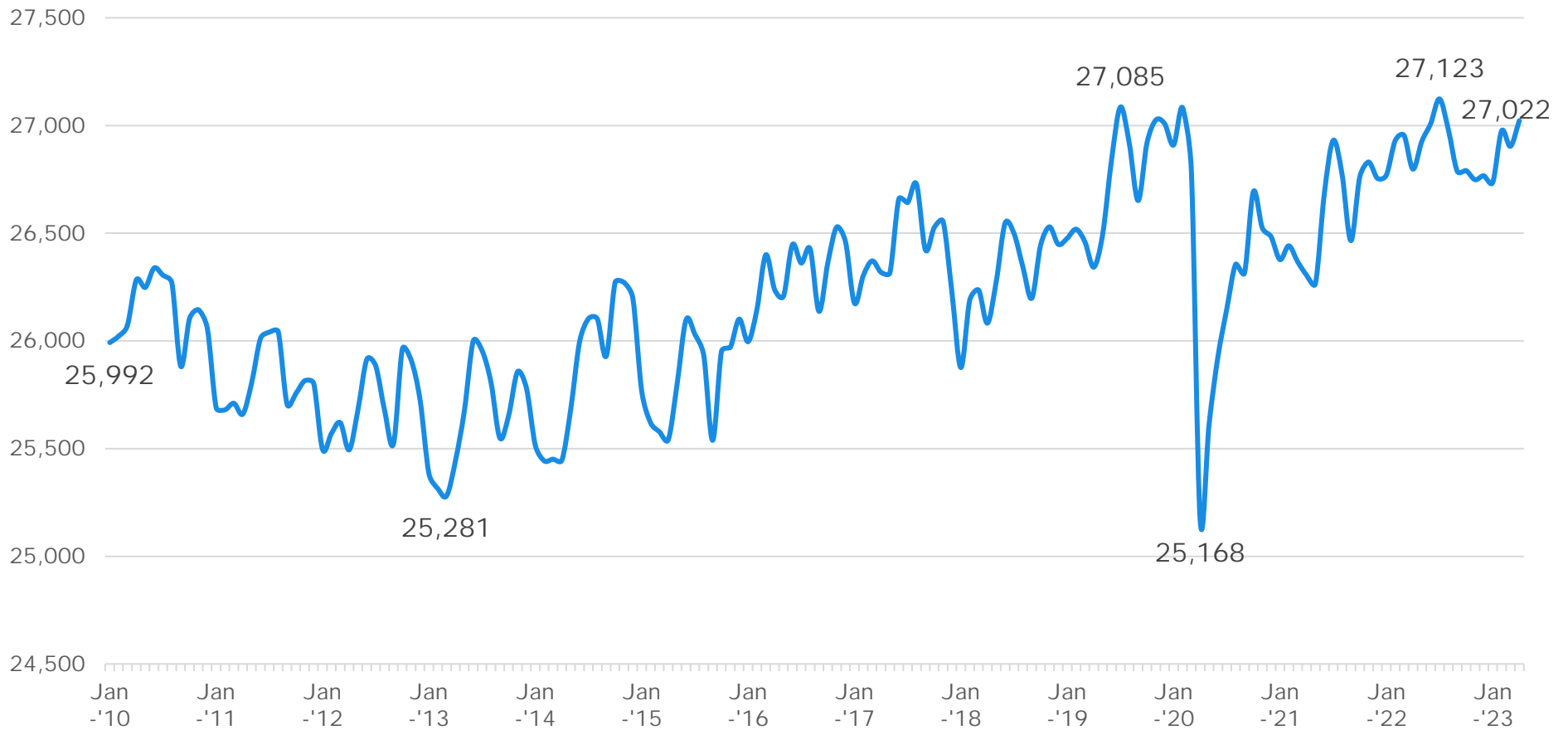
Share of population by race cohort, 2021



Source: US Census Bureau

Labor force

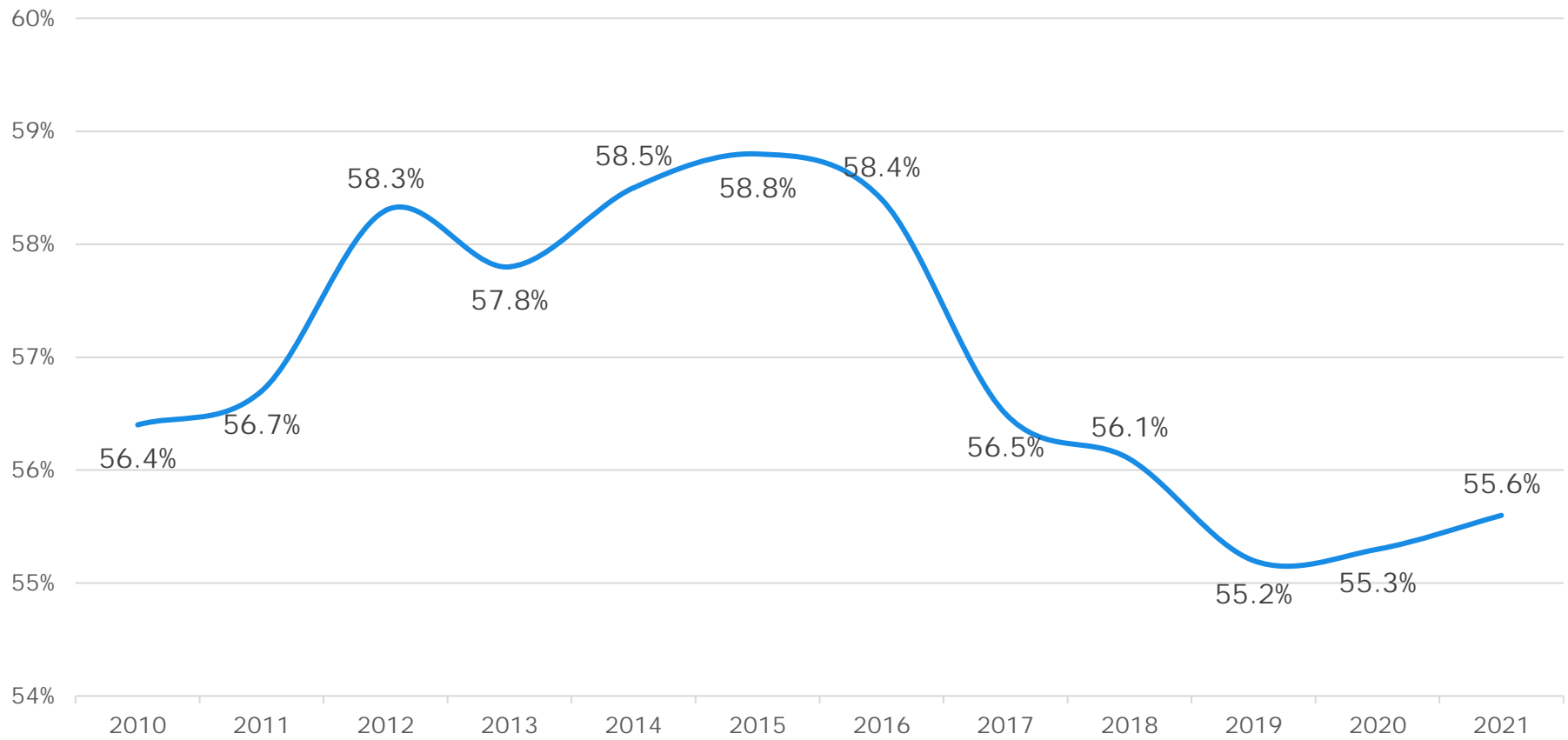
Monthly size of labor force (non-seasonally adjusted), January 2010 – April 2023



Source: US Bureau of Labor Statistics

Labor force

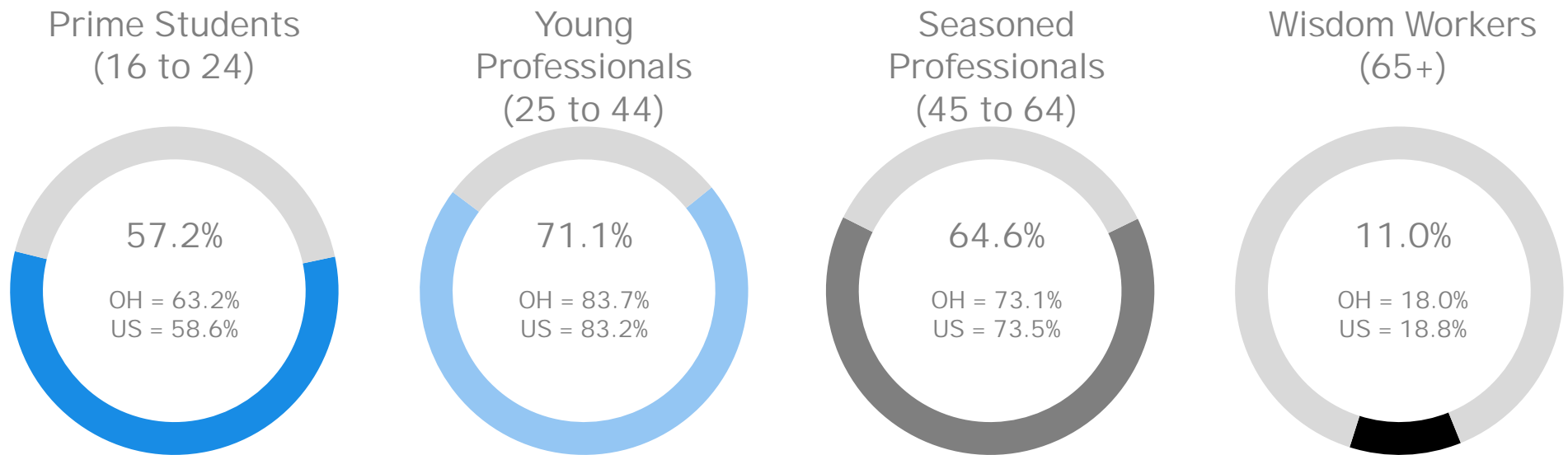
Labor force participation rate, 2010 - 2021



Source: US Census Bureau

Labor force

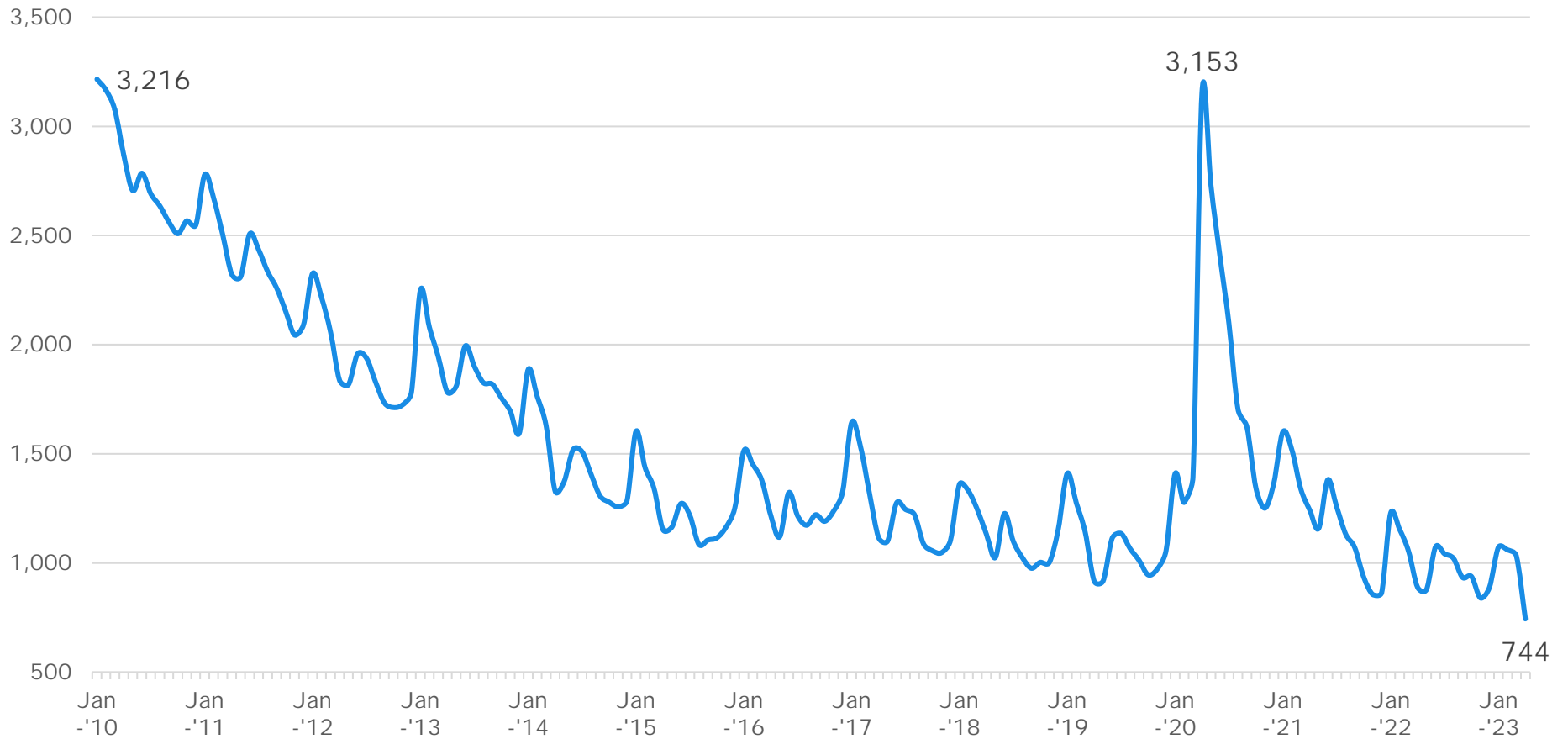
Labor force participation rate by age cohort (among residents 16 years and older) in Pickaway County, 2021



Source: US Census Bureau

Unemployment

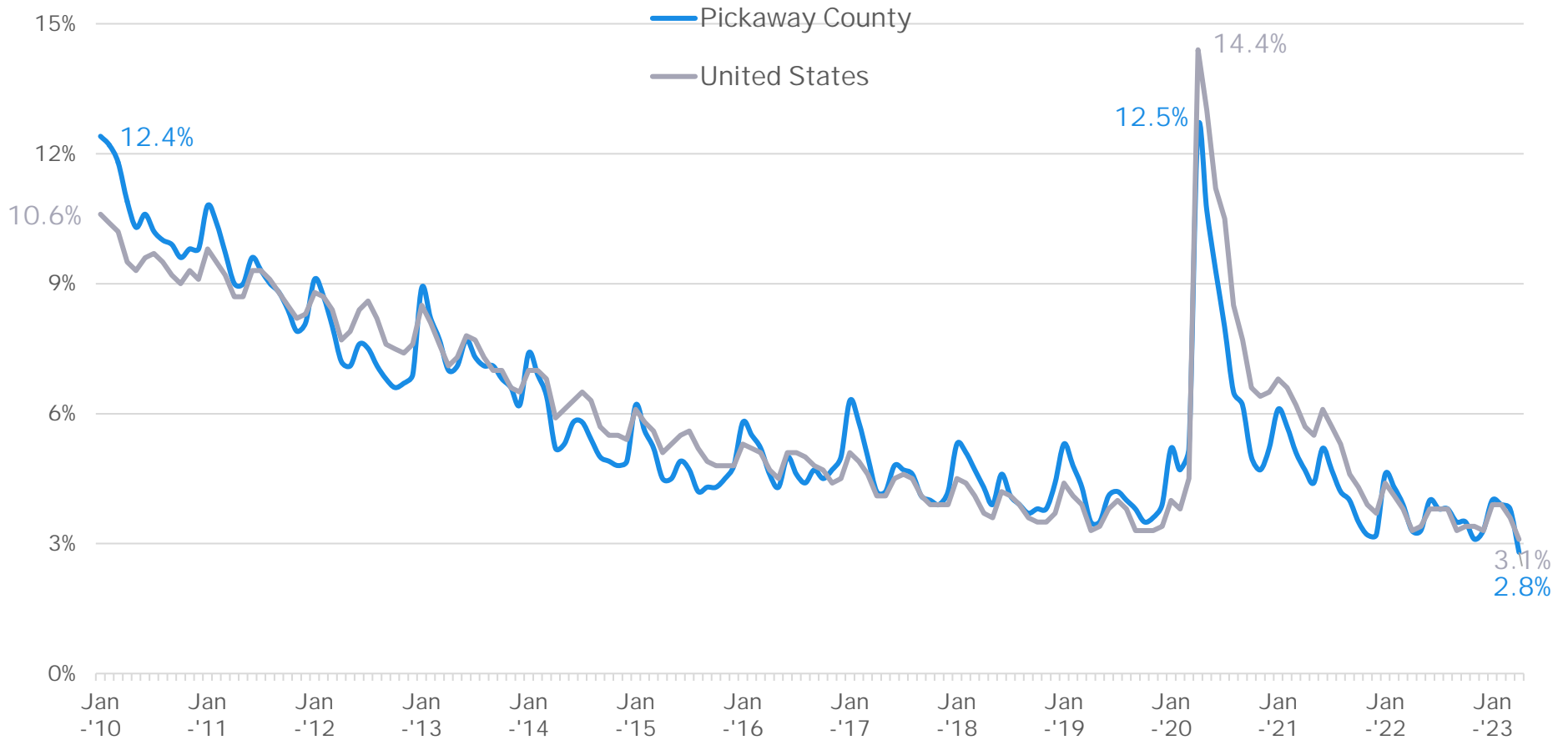
Monthly size of unemployed population (non-seasonally adjusted), January 2010 - April 2023



Source: US Bureau of Labor Statistics

Unemployment rate

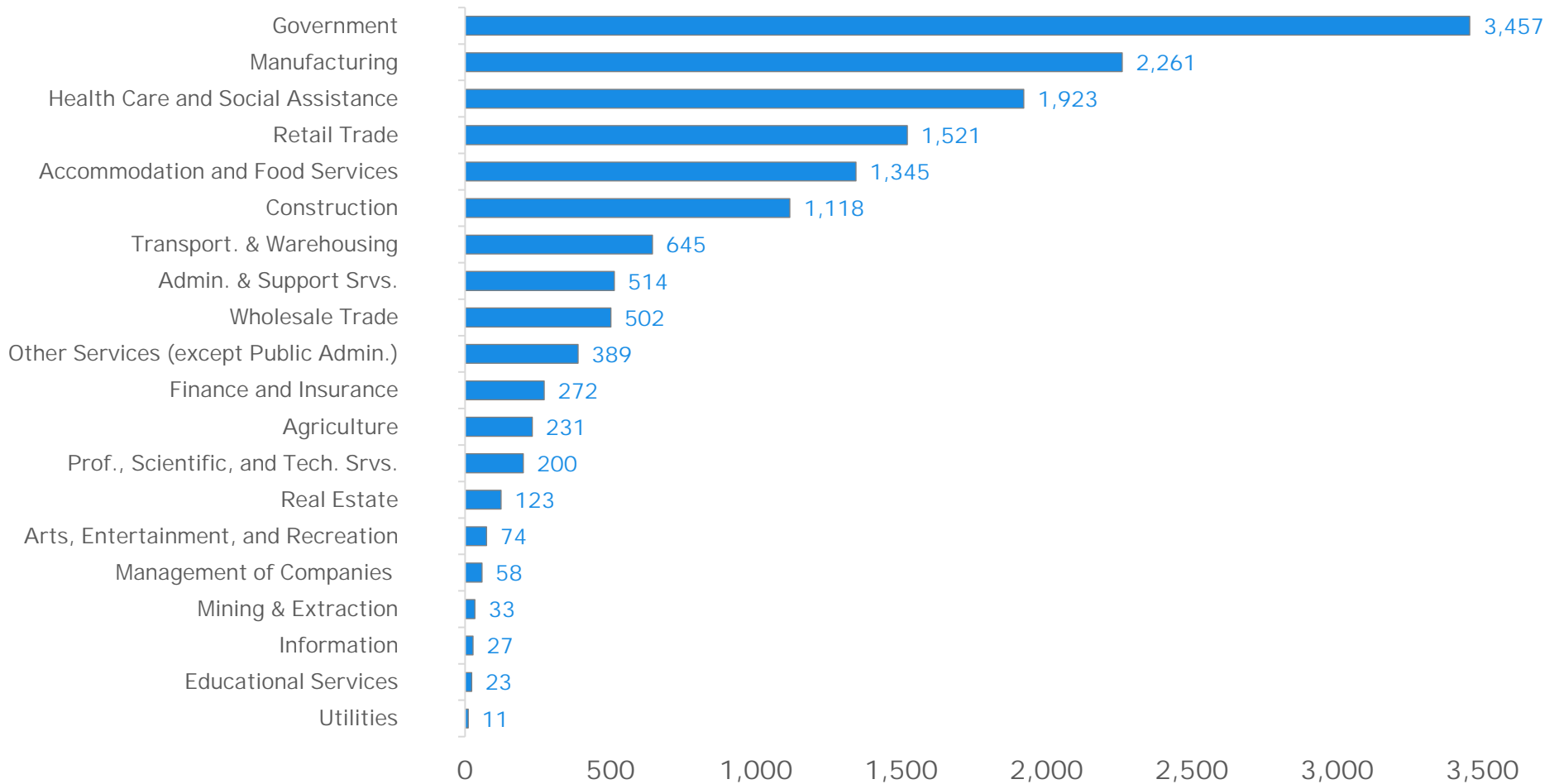
Monthly unemployment rate (non-seasonally adjusted), January 2010 - April 2023



Source: US Bureau of Labor Statistics

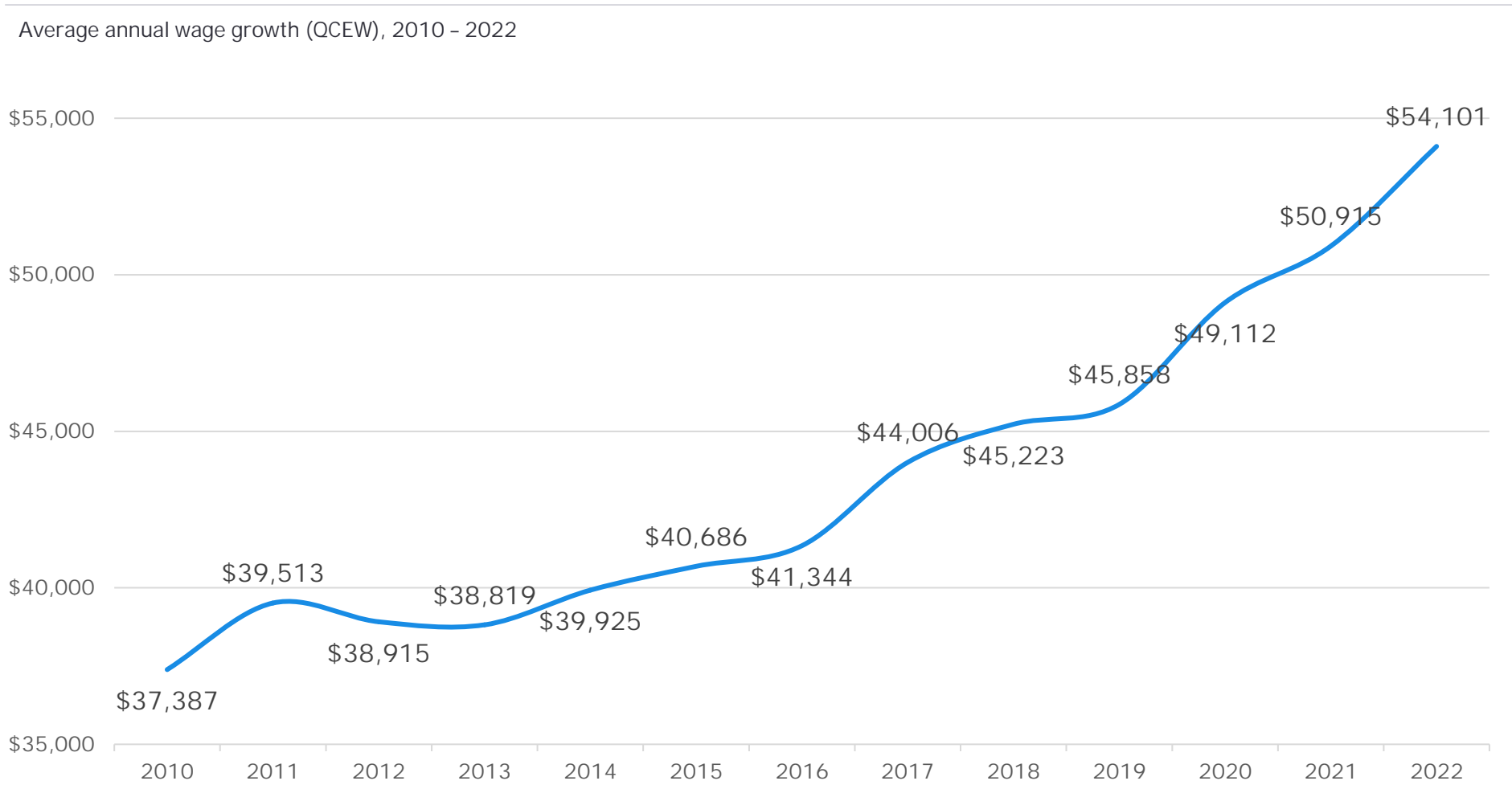
Employment by industry

Employment by industry (2-Digit NAICS, QCEW), 2022



Source: Lightcast

Average wage growth

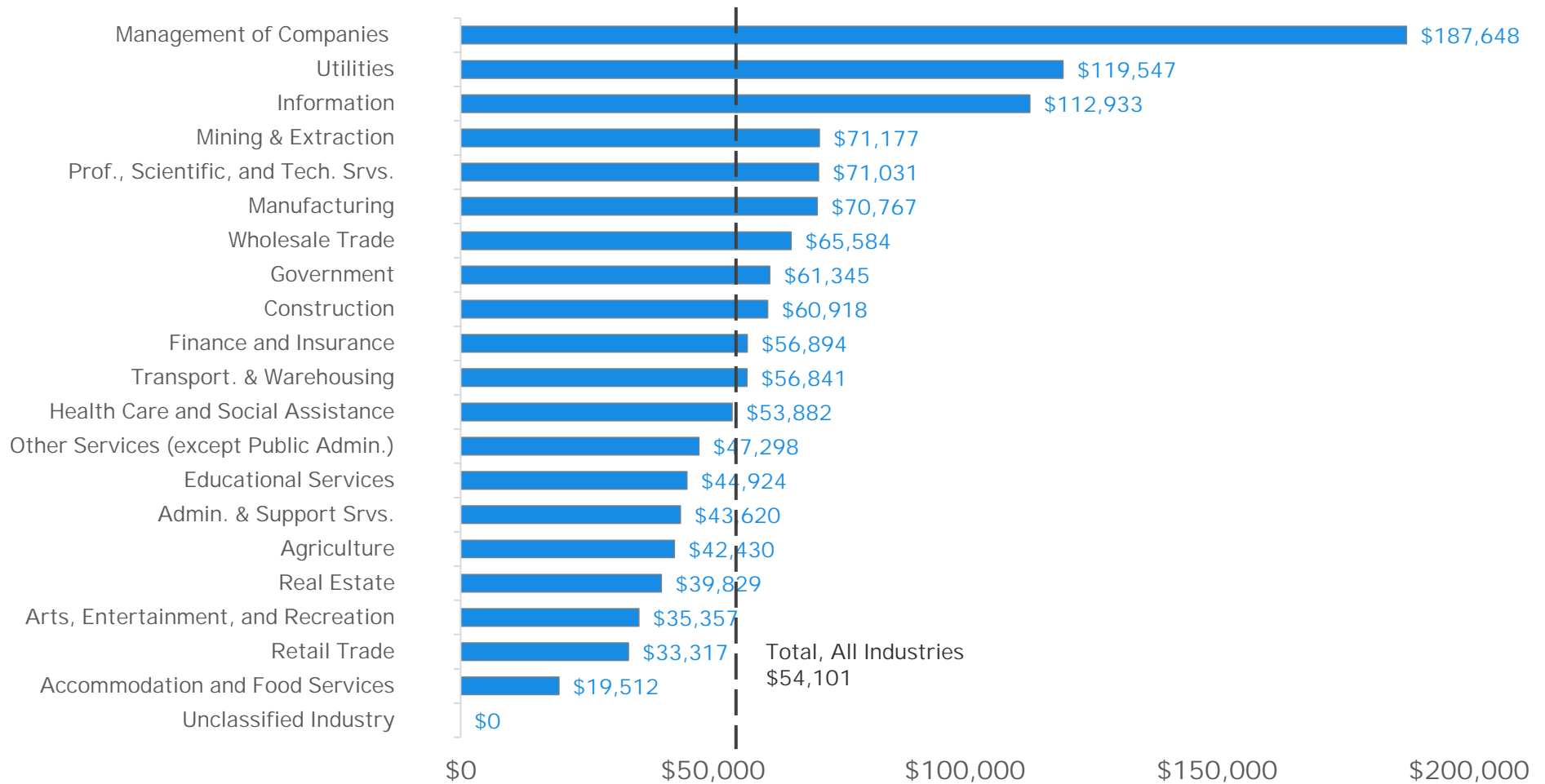


Source: Lightcast



Wage by industry

Wage by industry (2-Digit NAICS, OCEW), 2022

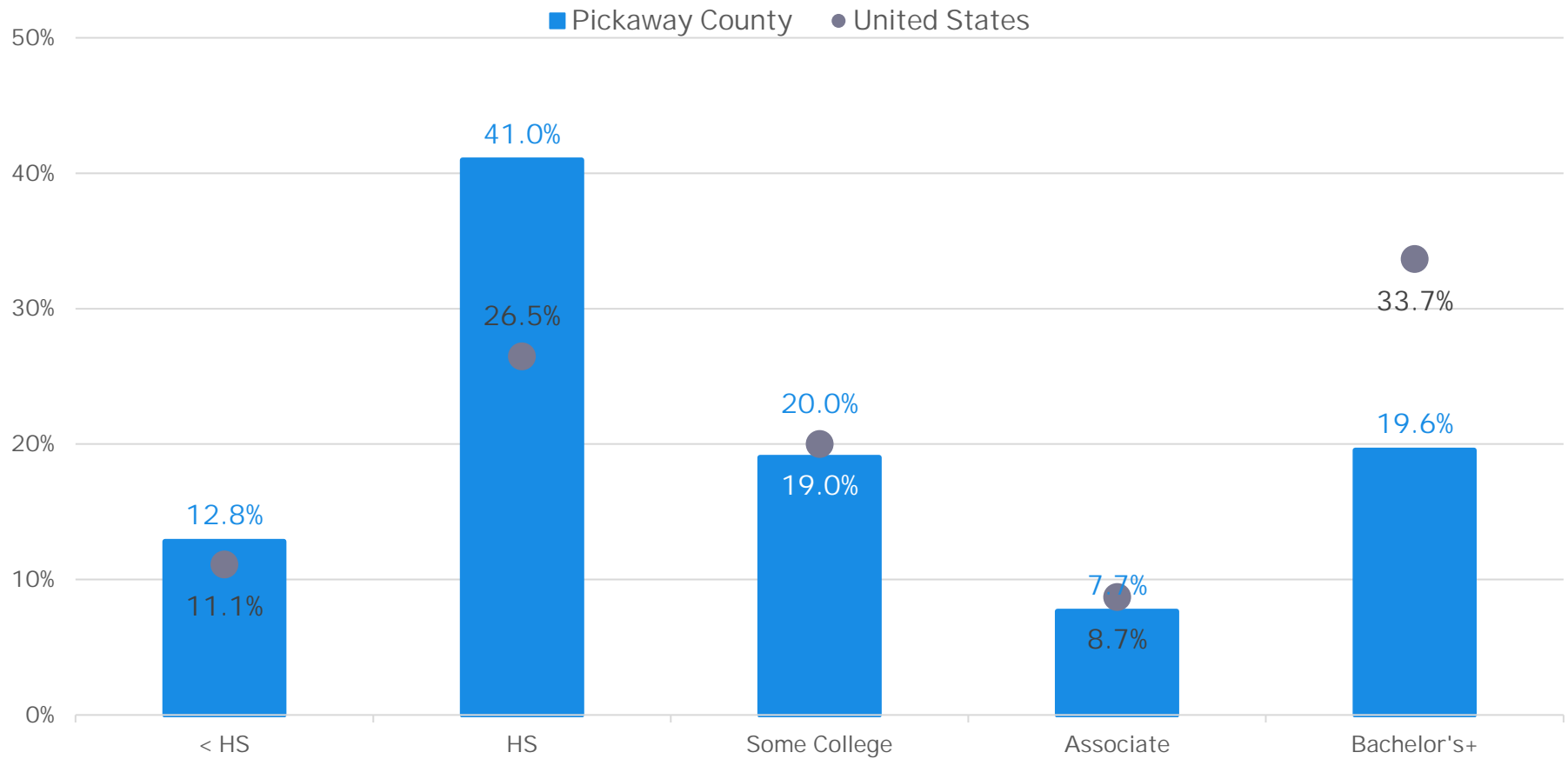


Source: Lightcast



Educational attainment

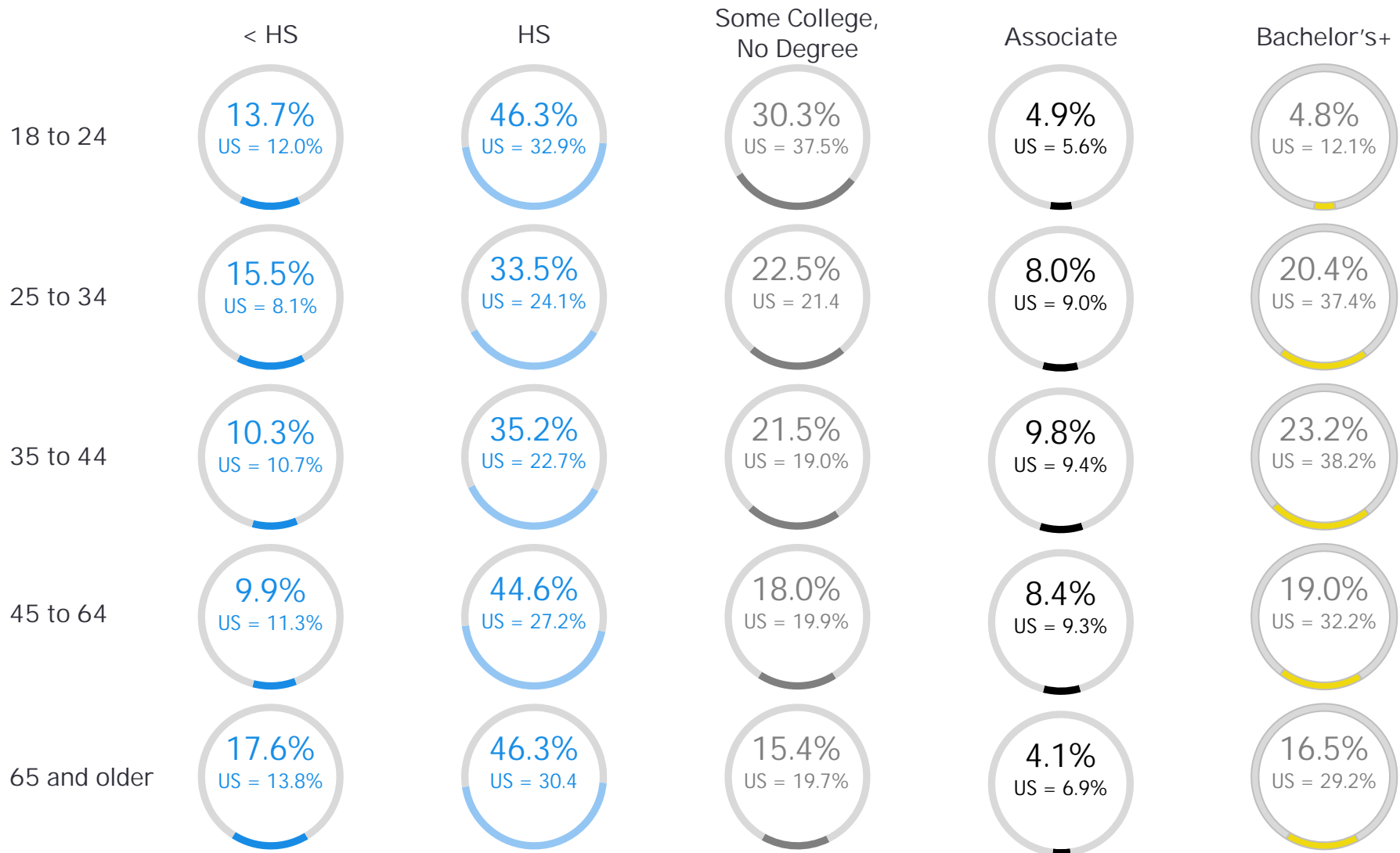
Educational attainment, 2021



Source: US Census Bureau

Educational attainment by age

Educational attainment by age (among residents ages 18 years of age and older), 2021



Industry composition

Between 2017 and 2022, more than two-thirds of industry clusters with a presence in Pickaway County experienced an increase in jobs. Industrial products, Industrial Machinery, and Electronics clusters, which did not have a presence in 2017 emerged by 2022. Industrial Products saw the largest growth among these industries, gaining more than 950 jobs in the five-year period and becoming the most concentrated industry as of 2022. Government, Healthcare, and Retail were the largest clusters for jobs in 2022 and all experienced growth between 2017 and 2022.

Pickaway County's industry cluster performance, 2017 - 2022

Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)	Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)
Government	2,153	0.4%	1.9	Research	13	31.9%	0.1
Healthcare	1,653	31.5%	1.0	Biomedical R&D/Mfg	289	-58.9%	3.2
Hospitality	1,345	3.6%	1.0	Automotive	214	-73.5%	2.1
Construction Svcs.	1,115	31.9%	1.5	Mining & Logging	26	-40.2%	1.2
Industrial Products	951	100%*	4.4	Metalworking	227	-7.9%	1.2
Distribution & Logistics	643	34.0%	1.5	Education	1,410	-22.2%	1.1
Industrial Machinery	262	100%*	1.7	Non-Profits & Social Service	350	-2.4%	0.8
Electronics	140	100%*	1.2	Back Office	452	-19.2%	0.4
Retail	1,479	2.2%	0.9	Entertainment	68	-43.2%	0.3
Consumer Products	69	5.5%	0.9	Creative Content	24	-76.1%	0.1
Wholesale Trade	533	81.2%	0.8	Telecom Services	0	-100%	0.0
Agribusiness & Food	242	78.2%	0.8	Transportation	0	-100%	0.0
Personal Services	256	104.4%	0.7	Aerospace	0	0.0%	0.0
Energy	65	97.4%	0.6	Apparel & Textiles	0	0.0%	0.0
Financial Svcs.	363	4.5%	0.5	Furniture Mfg.	0	0.0%	0.0
Professional Services	140	15.2%	0.3	Shipbuilding	0	0.0%	0.0
Software / Info. Tech.	39	108.9%	0.1	Total	14,734	8.0%	1.00

Strong & Advancing

Weak but Advancing

Strong but Declining

Weak & Declining

Source: Lightcast

*Employment was zero in 2017

Occupational composition

Between 2017 and 2022, more occupational clusters experienced growth than decline in Pickaway County. Logistics, Medical, and Business clusters posted the largest increases in net new jobs. Education and Hospitality clusters saw the largest net decrease in jobs during the same period.

Pickaway County's occupational cluster performance, 2017 - 2022

Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)	Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)
Geology	48	20.0%	2.4	Computer	334	20.4%	0.6
Plant Operators	93	157.3%	2.3	Sales & Marketing	67	70.6%	0.6
Agriculture	202	79.0%	1.8	Education	1,143	-14.8%	1.3
Production	1,389	7.4%	1.6	Political	16	-20.0%	1.2
Construction	873	22.7%	1.4	Hospitality	1,839	-7.6%	1.0
Social Service	957	5.7%	1.4	Architecture	16	0.0%	0.9
Logistics	1,716	17.7%	1.2	Legal	98	-2.8%	0.8
Engineering	341	1.6%	1.1	Performance	42	-23.0%	0.8
Mechanics	633	29.7%	1.1	Communications	52	-26.5%	0.8
Medical	1,514	18.1%	0.9	Design	56	-28.9%	0.6
Personal Services	1,220	8.6%	0.9	Financial	282	-1.6%	0.6
Back Office	1,778	5.5%	0.9	Math	16	0.0%	0.6
Business	538	53.0%	0.8	Total	14,734	8.0%	1.0

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Source: Lightcast

Occupational composition of resident workers

Resident workers are individuals that live in the region but may work outside of the region. These occupational clusters reflect the types of jobs your residents work in, whether in or outside the region. In 2022, the top five occupational cluster in terms of total resident workers were Logistics, Back Office, Hospitality, Medical, and Personal Services. With a 1.4 location quotient value, Logistics was the most concentrated cluster in 2022. Logistics, Medical, Business, Construction, and Social Service saw the largest net gains in resident workers between 2017 and 2022.

Pickaway County's occupational cluster performance for resident workers

Cluster	Resident workers (2022)	Resident worker growth (2017-2022)	Location quotient (2022)	Cluster	Resident workers (2022)	Resident worker growth (2017-2022)	Location quotient (2022)
Logistics	3,723	13.8%	1.4	Political	24	-9.7%	1.1
Construction	1,228	11.9%	1.1	Education	1,596	-3.7%	1.0
Production	1,693	1.0%	1.1	Hospitality	3,244	-1.4%	1.0
Social Service	1,368	8.9%	1.1	Back Office	3,449	-1.8%	1.0
Mechanics	1,054	4.9%	1.0	Personal Services	2,189	-6.2%	0.9
Plant Operators	72	16.0%	1.0	Engineering	412	-12.9%	0.8
Medical	2,825	17.1%	1.0	Legal	161	-0.5%	0.8
Business	1,077	44.9%	0.9	Design	116	-1.8%	0.7
Math	38	15.4%	0.8	Financial	620	-0.3%	0.7
Computer	760	4.8%	0.8	Geology	24	0.0%	0.7
Sales & Marketing	151	19.1%	0.7	Communications	78	-11.0%	0.7
Architecture	23	2.5%	0.7	Performance	62	-22.5%	0.6
Agriculture	137	23.8%	0.7	Total	25,959	4.9%	1.0

Strong & Advancing

Weak but Advancing

Strong but Declining

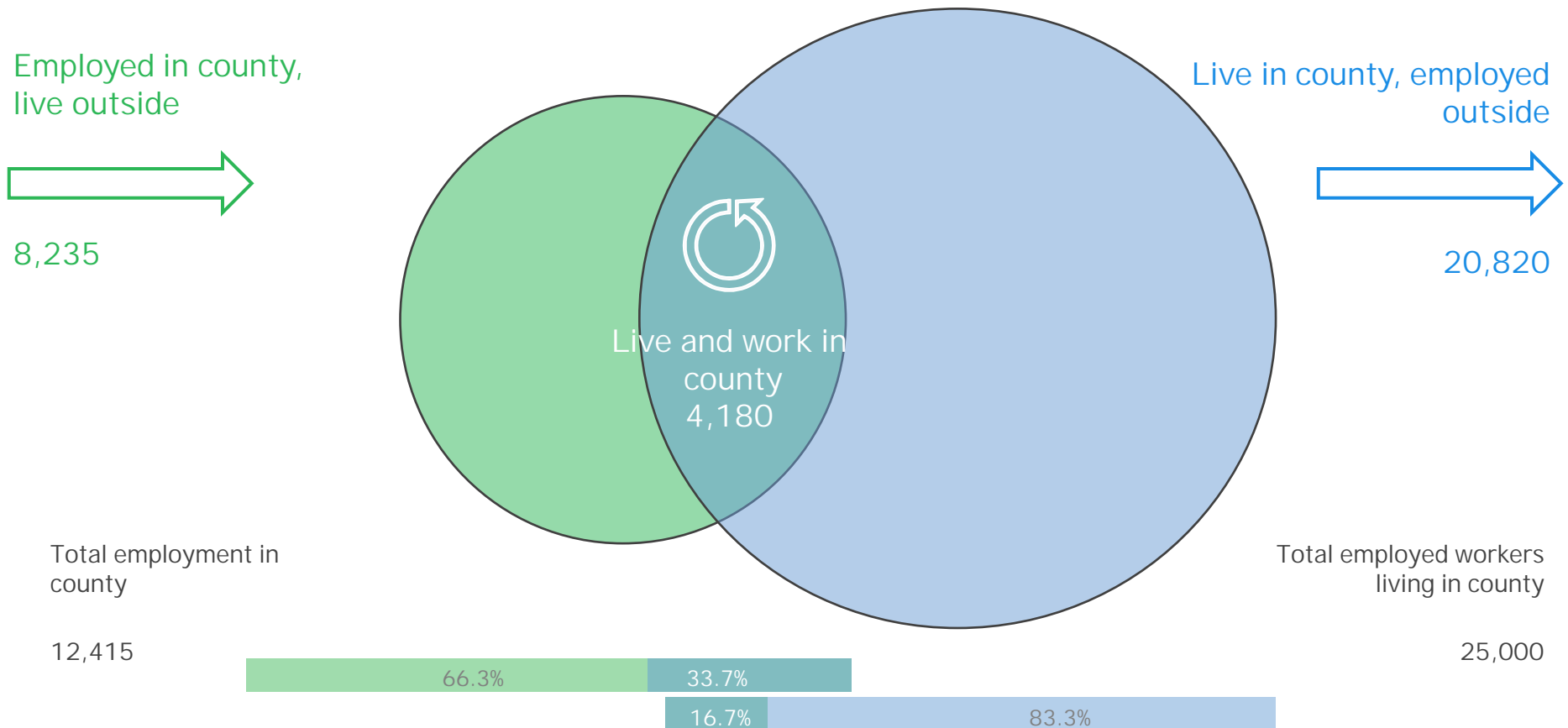
Weak & Declining

Source: Lightcast

Inflow/outflow analysis

While Pickaway County exports and imports talent, the county is a net exporter overall. Of the nearly 25,000 employed individuals residing in the county, approximately 83% are employed outside of the county. At the same time, approximately 66% of workers employed in the county live elsewhere outside of Pickaway County.

Pickaway County workforce inflow/outflow dynamics, 2020

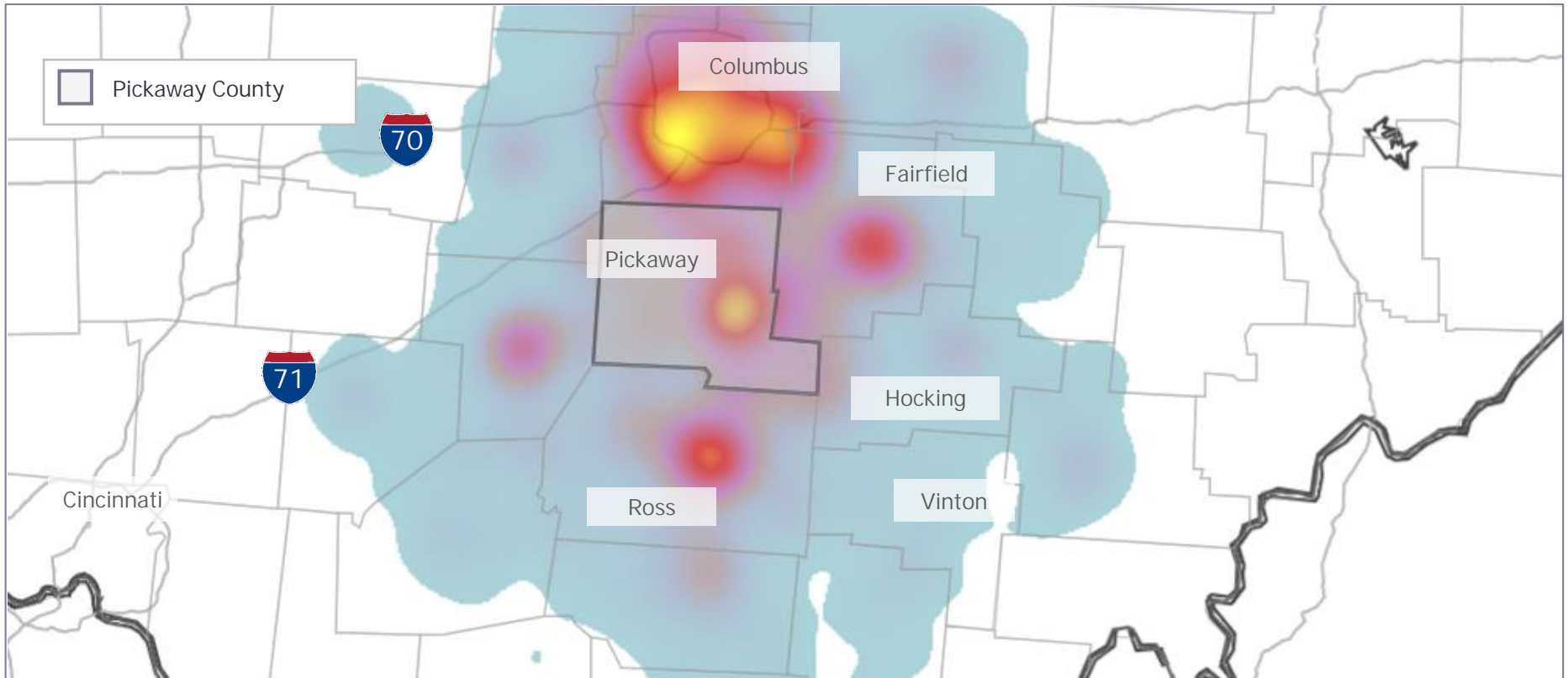


Source: US Census Bureau

Vinton County worker origin

The map below shows the origins of workers for the Pickaway County. The area shown below accounts for approximately 84% of the labor shed for the county and reflects approximately 10,480 workers. Given the proximity to Franklin County, it is unsurprising that Franklin County is a hotspot for workers commuting into Pickaway County. Ross and Fairfield Counties are also hotspots for workers within the Area 20 Region.

Pickaway County worker origin, 2020

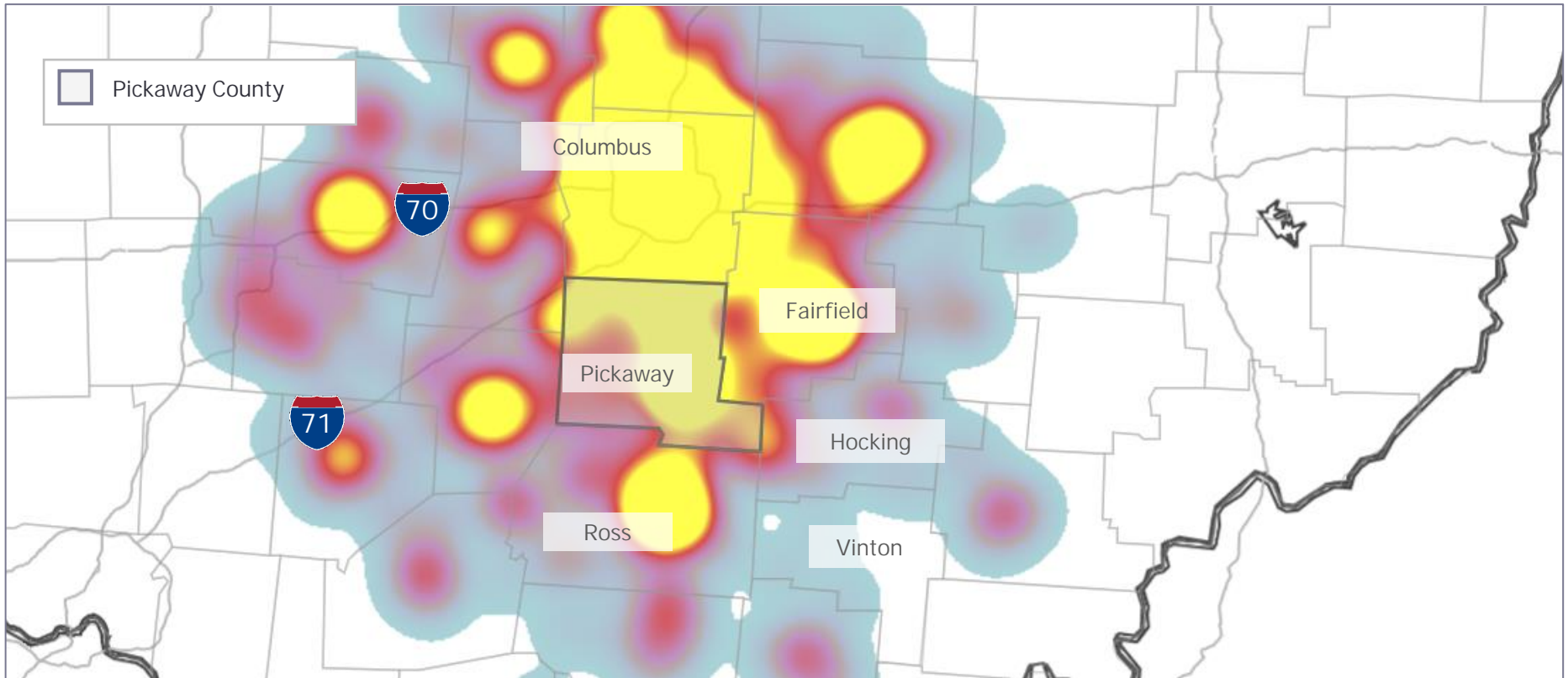


Source: US Census Bureau

Vinton County's resident worker destinations

The map below shows the work destinations of resident workers in Pickaway County. The area shown below accounts for approximately 21,060 resident workers, or 84% of the county's resident workforce. While many residents work within the region, Franklin, Licking, Fayette, and Clark counties are also hotspots for resident workers commuting out of the county and region for work.

Pickaway County's resident worker destinations, 2020

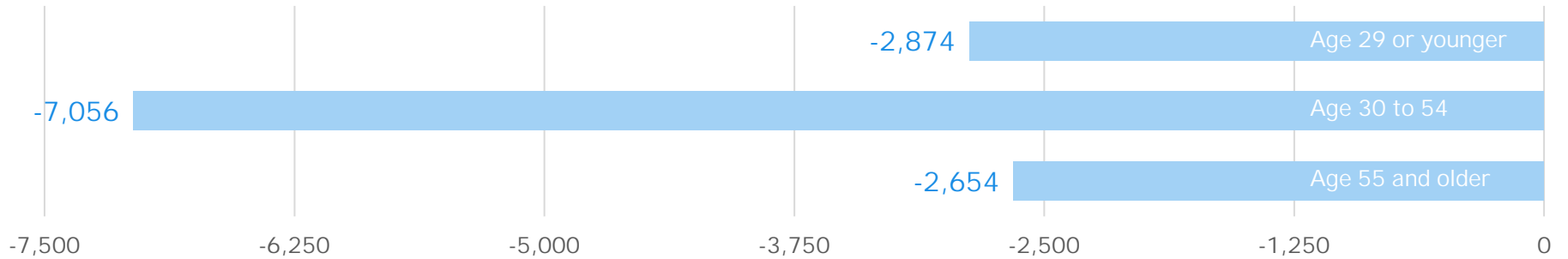


Source: US Census Bureau

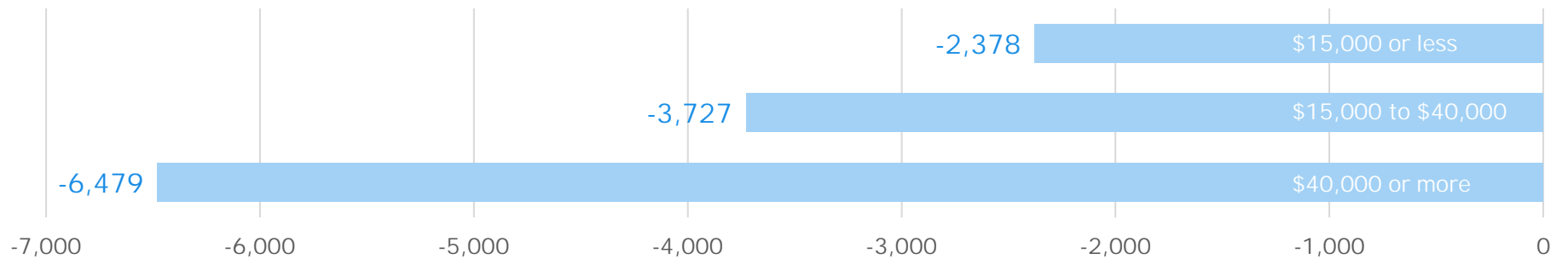
Inflow/outflow of workers by age and earnings

Pickaway County exported talent at every age and earnings bracket in 2020. Prime working age residents, ages 30 to 54, commuted out in larger numbers compared to the other age cohorts. Similarly, workers earning \$40,000 or more commuted out of the county at much higher levels than those workers earning less than \$40,000 annually.

Net inflow/outflow of workers into Pickaway County by age, 2020



Net inflow/outflow of workers into Pickaway County by earnings, 2020



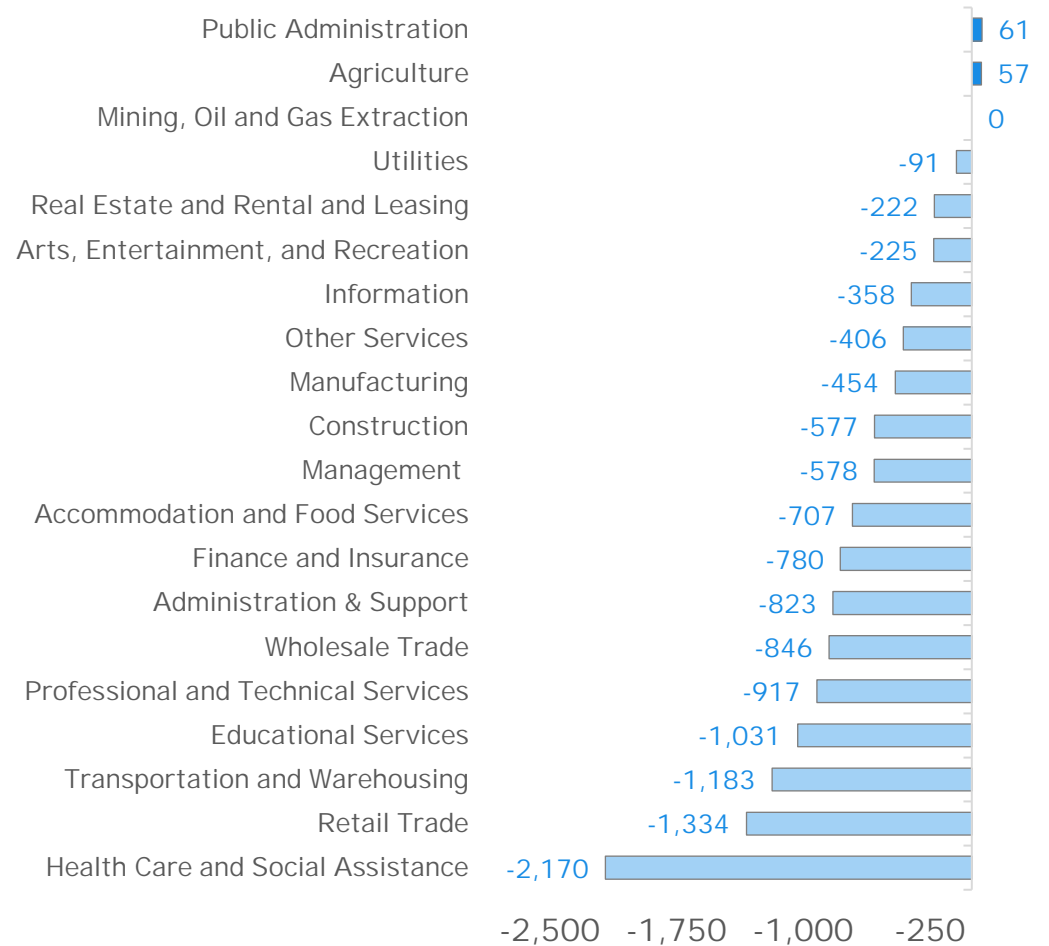
Source: US Census Bureau

Net inflow of workers by industry

Pickaway County is a net exporter of talent across most industries. There are just two industries in which employment within the county exceeds the number of resident workers. These industries include Public Administration and Agriculture. Mining, Oil & Gas Extraction have the same number of resident workers in these industries as there are jobs.

In all other industries, the number of resident workers exceeds employment. For example, Pickaway County is home to approximately 2,170 more workers employed in Health Care and Social Assistance compared to the total number of industry jobs located within in the city. Other major industries in which Pickaway County is an exporter of talent includes Retail, Transportation & Warehousing, Education, and Professional & Technical Services.

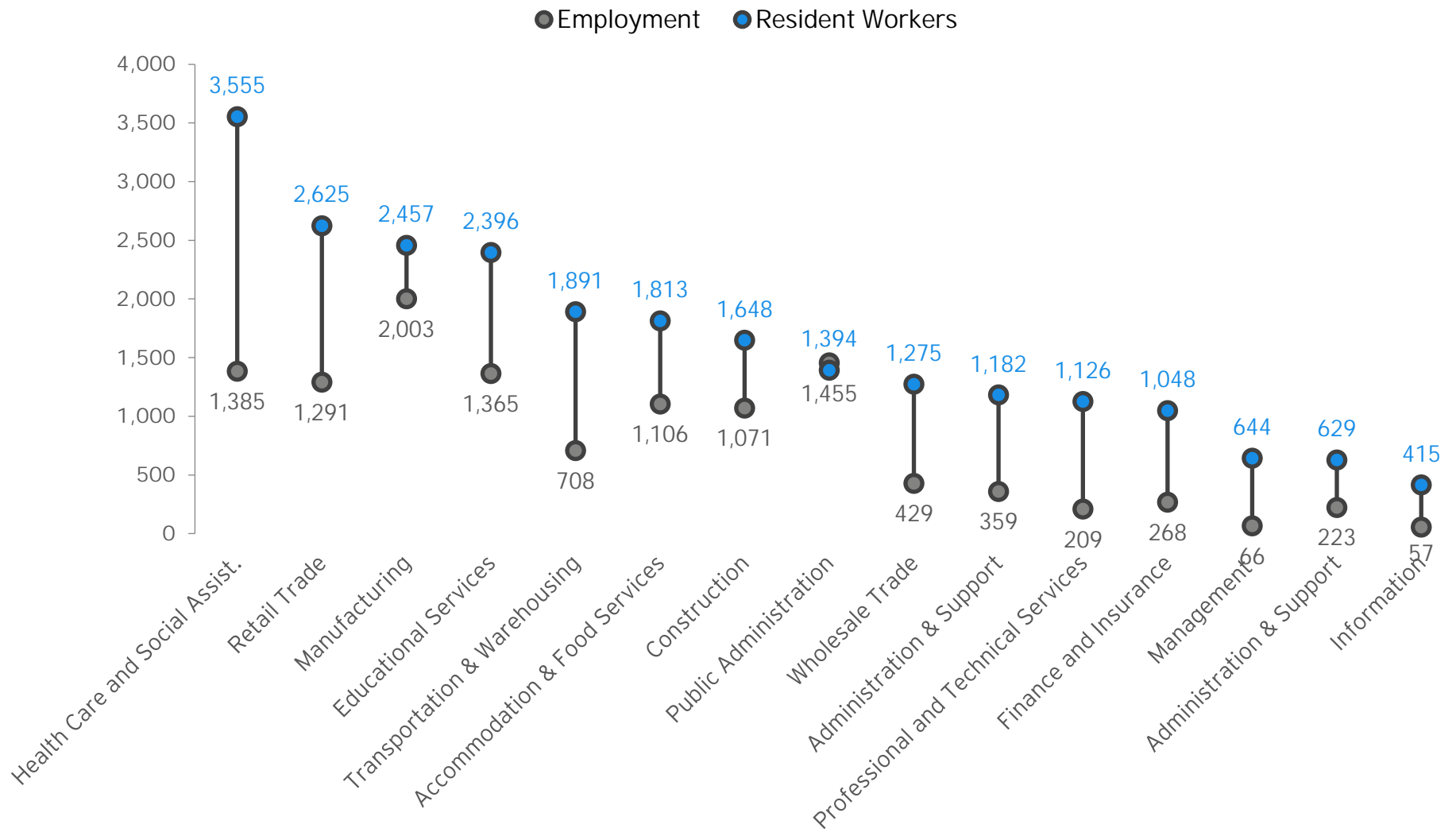
Net inflow/outflow of workers into Pickaway County by industry composition, 2020



Source: US Census Bureau

Industry composition by worker origin

Pickaway County's employment versus resident workers for top 15 industry clusters, 2020

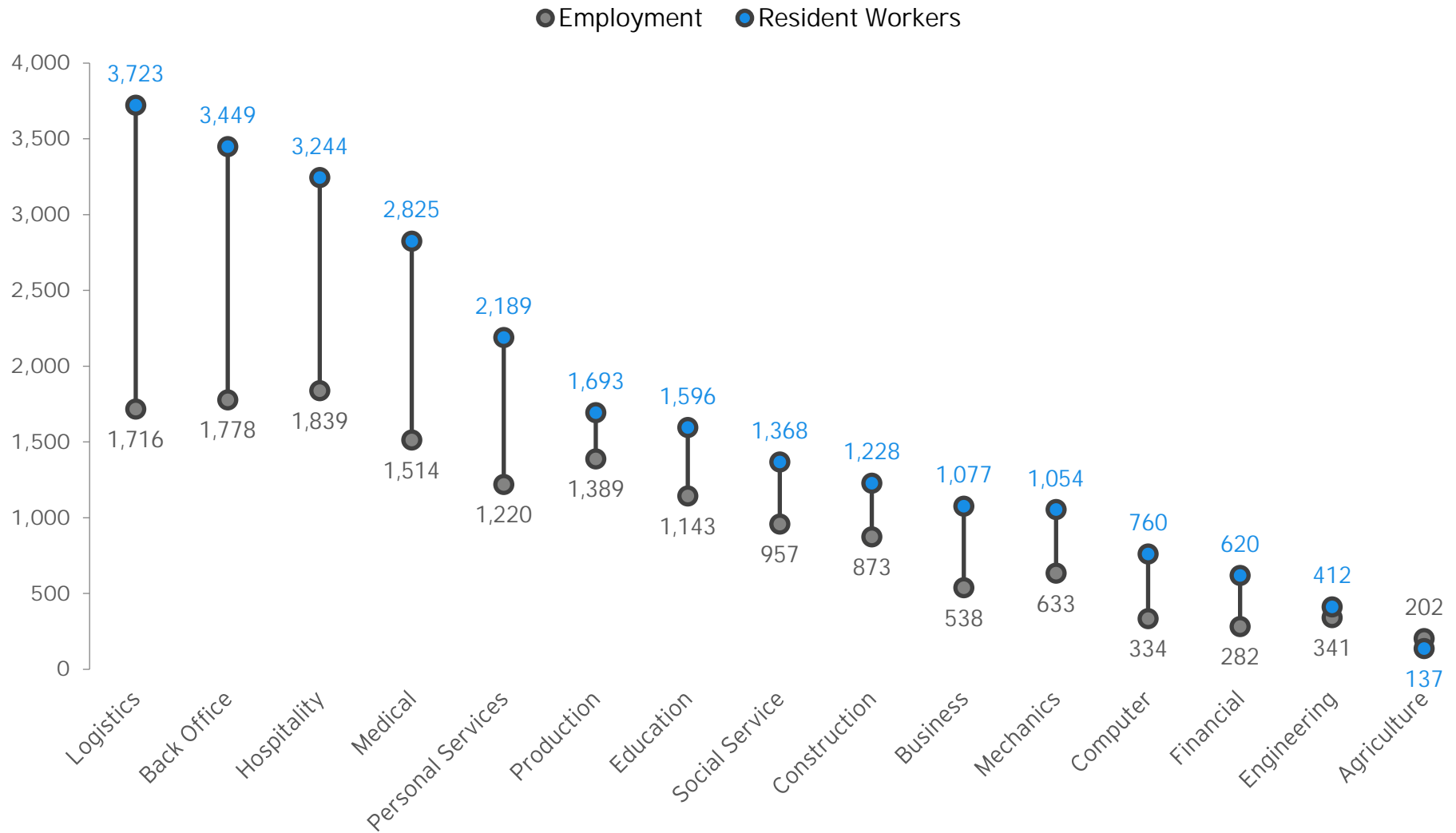


Source: US Census Bureau



Occupation composition by worker origin

Pickaway County's employment versus resident workers for top 15 occupational clusters, 2022



Source: Lightcast

Forecasted growth in industry composition

In the table below, we examine possible employment forecasts for industry clusters in Pickaway County. The top five clusters forecasted to add the most net new jobs over the next ten years are Healthcare, Industrial Products, Construction Services, Wholesales Trade, and Distribution & Logistics. Overall, the county is forecasted to add nearly 1,650 jobs over the next decade, growing by more than 11%.

Pickaway County's industry cluster forecasted growth

Cluster	Employment (2022)	Forecasted Employment (2024)	Forecasted Employment (2032)	Cluster	Employment (2022)	Forecasted Employment (2024)	Forecasted Employment (2032)
Aerospace	--	--	--	Healthcare	1,653	1,779	2,088
Agribusiness & Food	242	272	353	Hospitality	1,345	1,400	1,516
Apparel & Textiles	--	10	--	Industrial Products	951	1,058	1,208
Automotive	214	155	28	Industrial Machinery	262	310	368
Back Office	452	449	431	Metalworking	227	225	212
Biomedical R&D/Mfg	289	270	223	Mining & Logging	26	26	24
Construction Svcs.	1,115	1,211	1,362	Non-Profits & Social Service	350	368	427
Consumer Products	69	72	72	Personal Services	256	290	345
Creative Content	24	25	25	Professional Services	140	139	126
Distribution & Logistics	643	723	836	Research	13	15	19
Education	1,410	1,392	1,360	Retail	1,479	1,476	1,452
Electronics	140	183	259	Shipbuilding	--	--	--
Energy	65	94	137	Software / Info. Tech.	39	45	69
Entertainment	68	65	54	Telecom Services	--	--	--
Financial Svcs.	363	368	381	Transportation	--	--	--
Furniture Mfg.	--	--	--	Wholesale Trade	533	610	764
Government	2,153	2,125	2,061	Total	14,734	15,375	16,384

Source: Lightcast



Forecasted growth in occupational composition

In the table below, we examine possible employment forecasts for occupational clusters at the county level. Logistics, Medical, and Construction are forecasted to experience the largest net new jobs created in Pickaway County over the next decade. Agriculture and Sales & Marketing clusters are forecasted to grow at a faster pace among clusters over the next ten years. Education and Legal clusters are forecasted to experience declines over the next ten years.

Pickaway County's occupational cluster forecasted growth

Cluster	Employment (2022)	Forecasted Employment (2024)	Forecasted Employment (2032)	Cluster	Employment (2022)	Forecasted Employment (2024)	Forecasted Employment (2032)
Agriculture	202	226	282	Legal	98	95	89
Architecture	16	16	16	Logistics	1,716	1,844	2,034
Back Office	1,778	1,817	1,844	Math	16	16	16
Business	538	565	611	Mechanics	633	686	768
Communications	52	52	53	Medical	1,514	1,601	1,801
Computer	334	352	394	Performance	42	42	38
Construction	873	940	1,062	Personal Services	1,220	1,259	1,305
Design	56	56	59	Plant Operators	93	95	96
Education	1,143	1,133	1,124	Political	16	16	16
Engineering	341	354	374	Production	1,389	1,433	1,441
Financial	282	287	294	Sales & Marketing	67	70	82
Geology	48	48	48	Social Service	957	963	973
Hospitality	1,839	1,902	2,013	Total	14,734	15,375	16,384

Source: Lightcast



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