



Fairfield County economic and background assessment

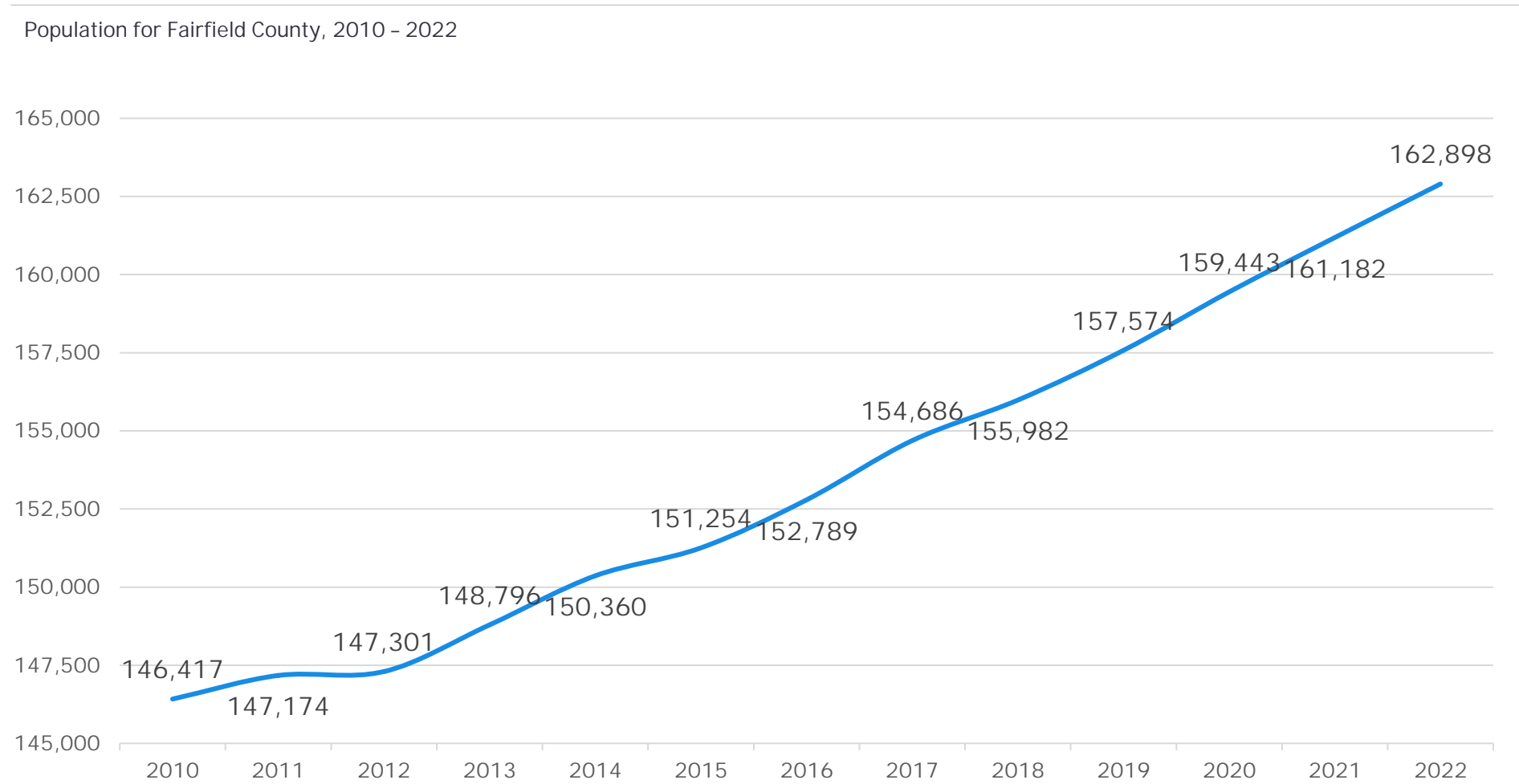
Prepared for: South Central Ohio
Workforce Partnership

July, 2023



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Population

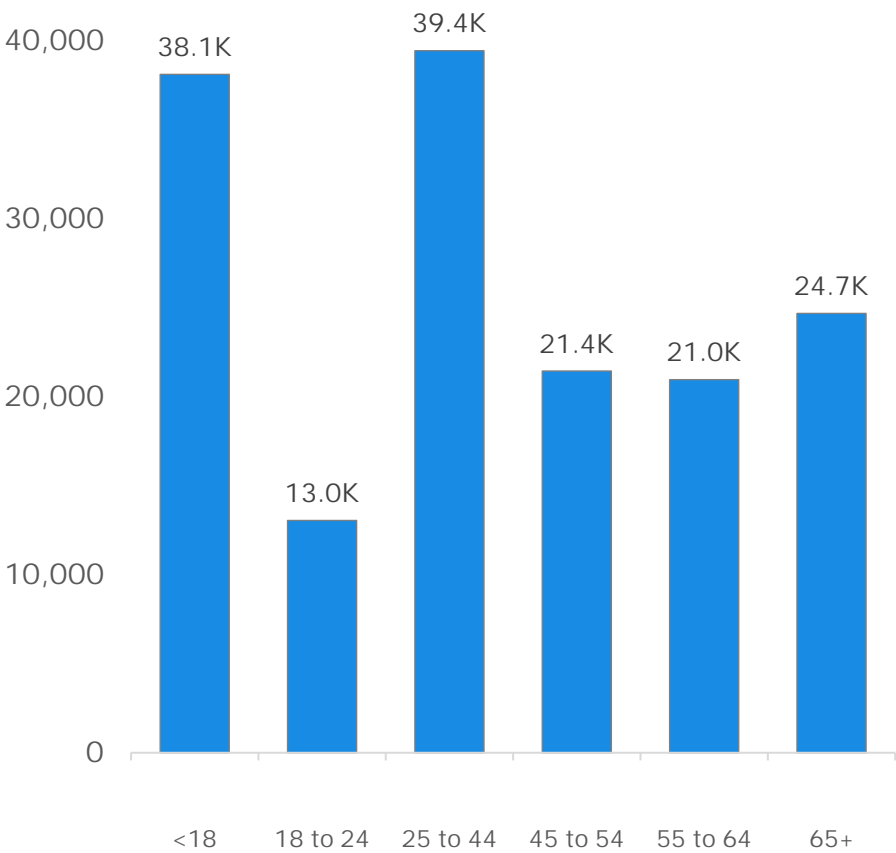


Source: US Census Bureau

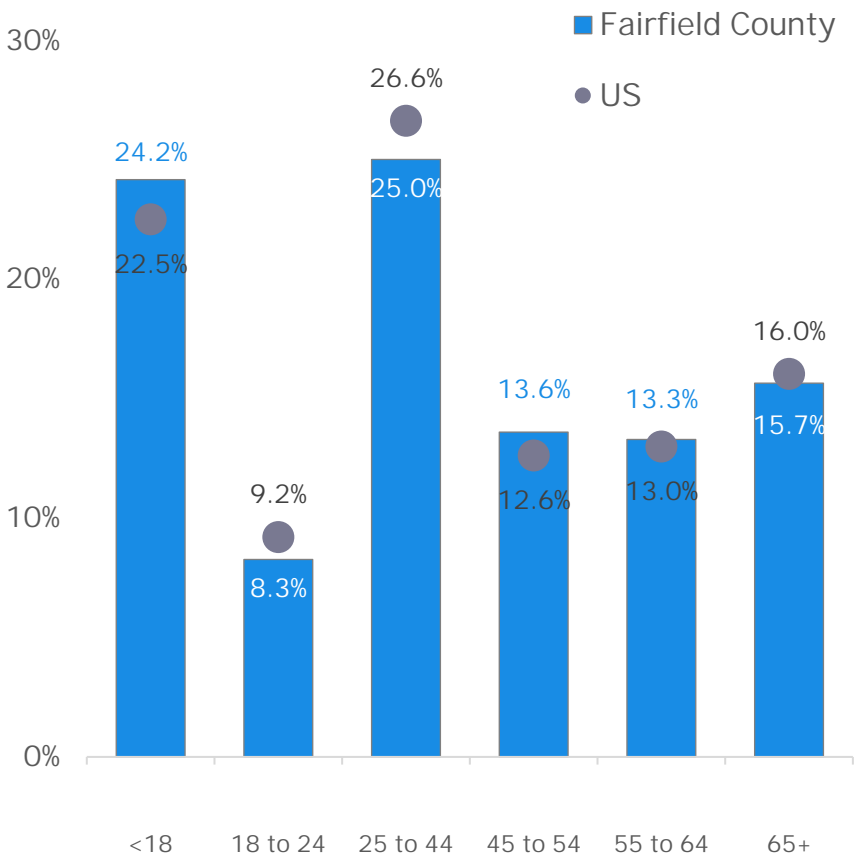


Population by age

Population by age cohort, 2021



Share of population by age cohort, 2021

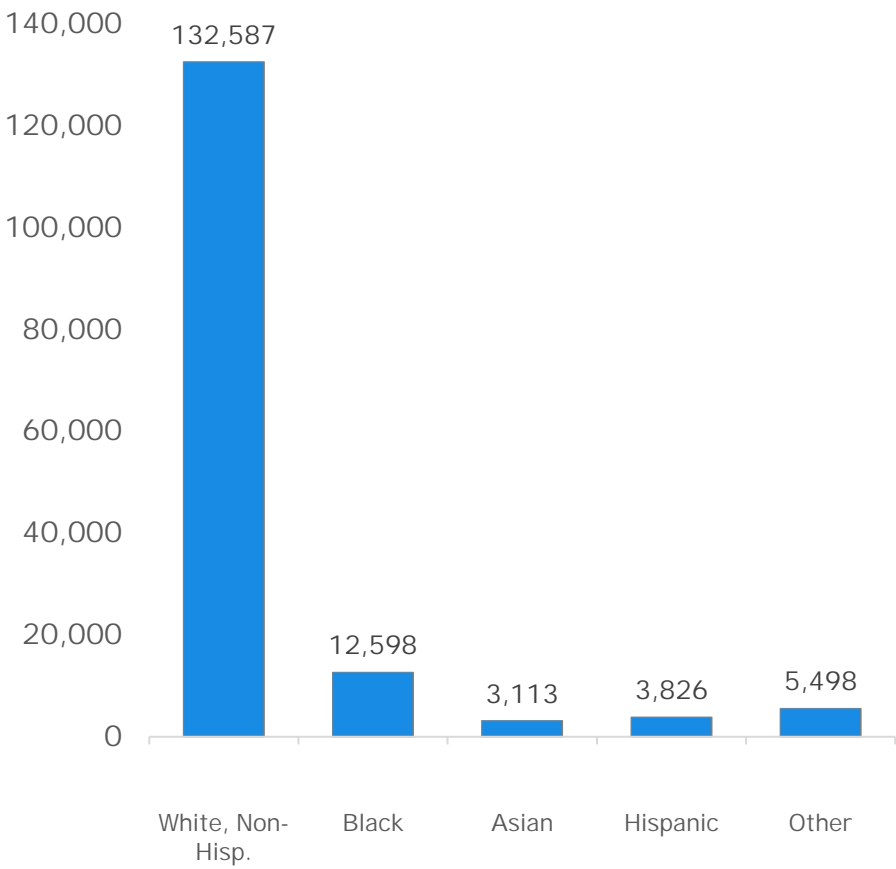


Source: US Census Bureau

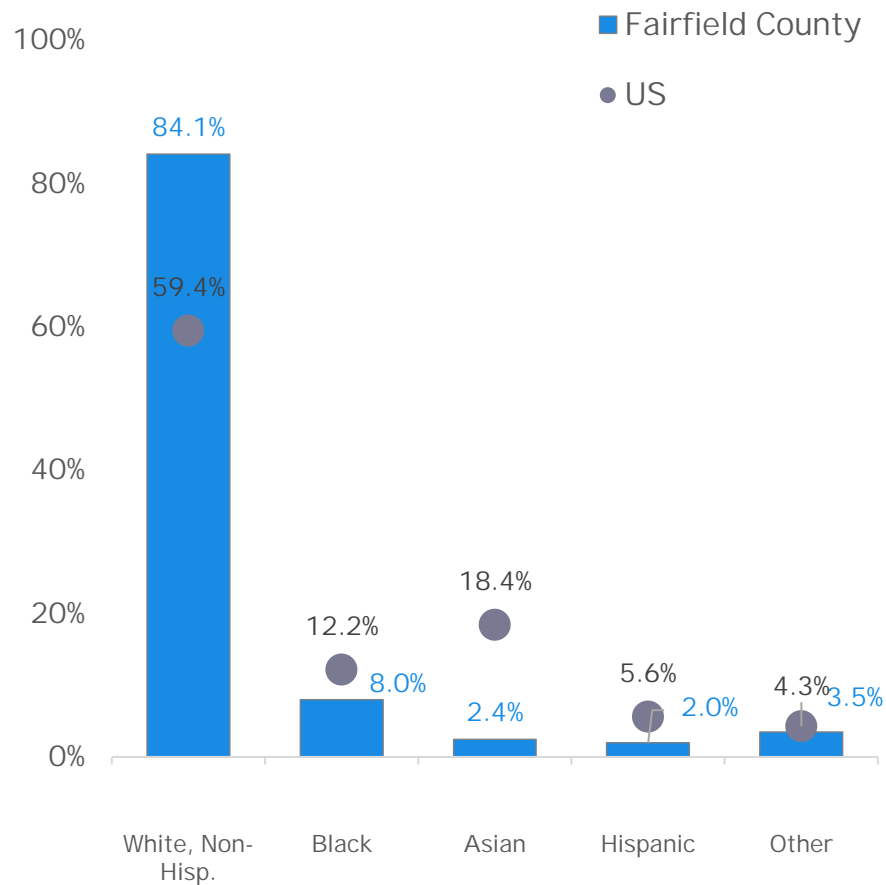


Population by race

Population by race cohort, 2021



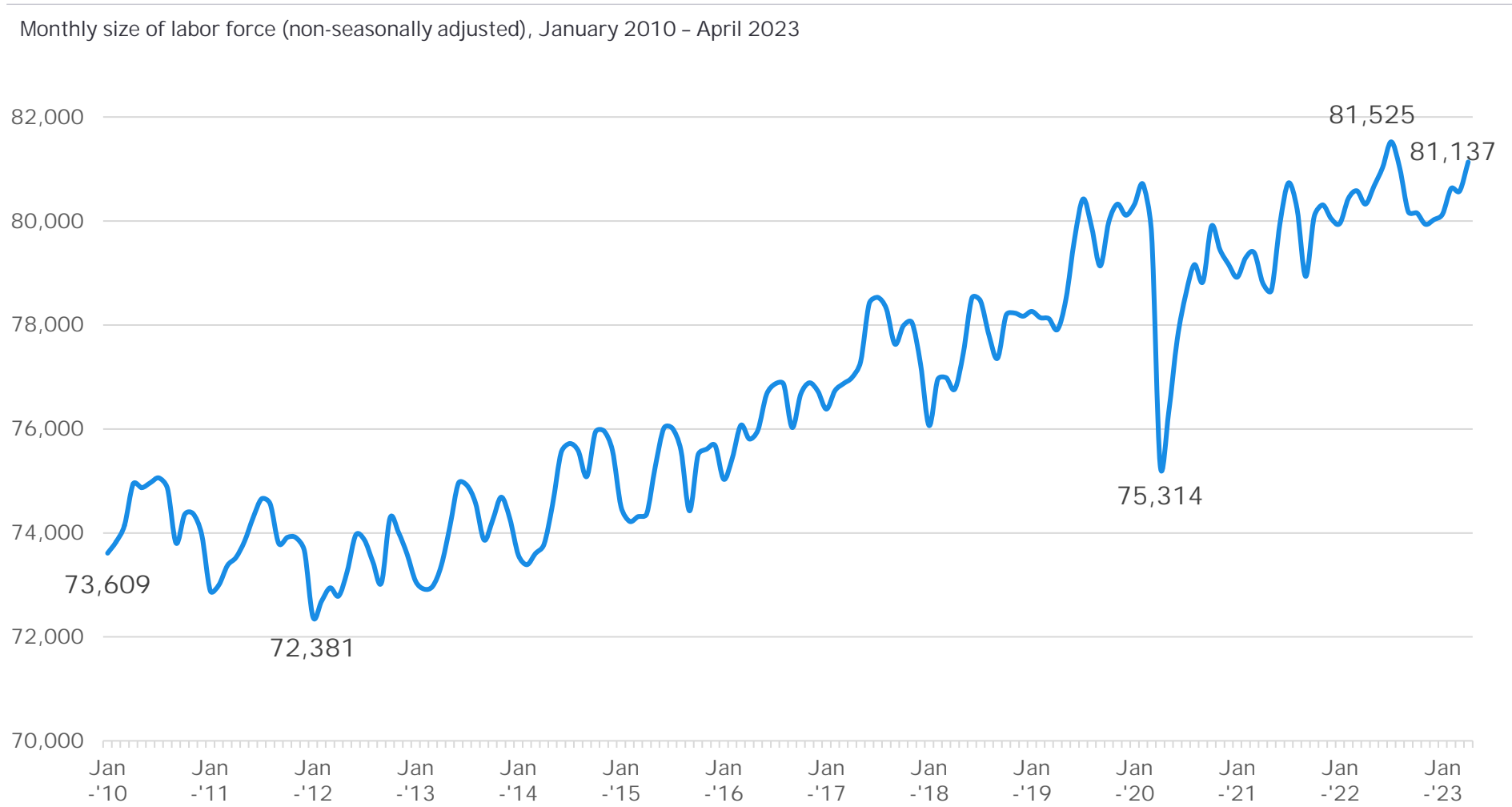
Share of population by race cohort, 2021



Source: US Census Bureau



Labor force

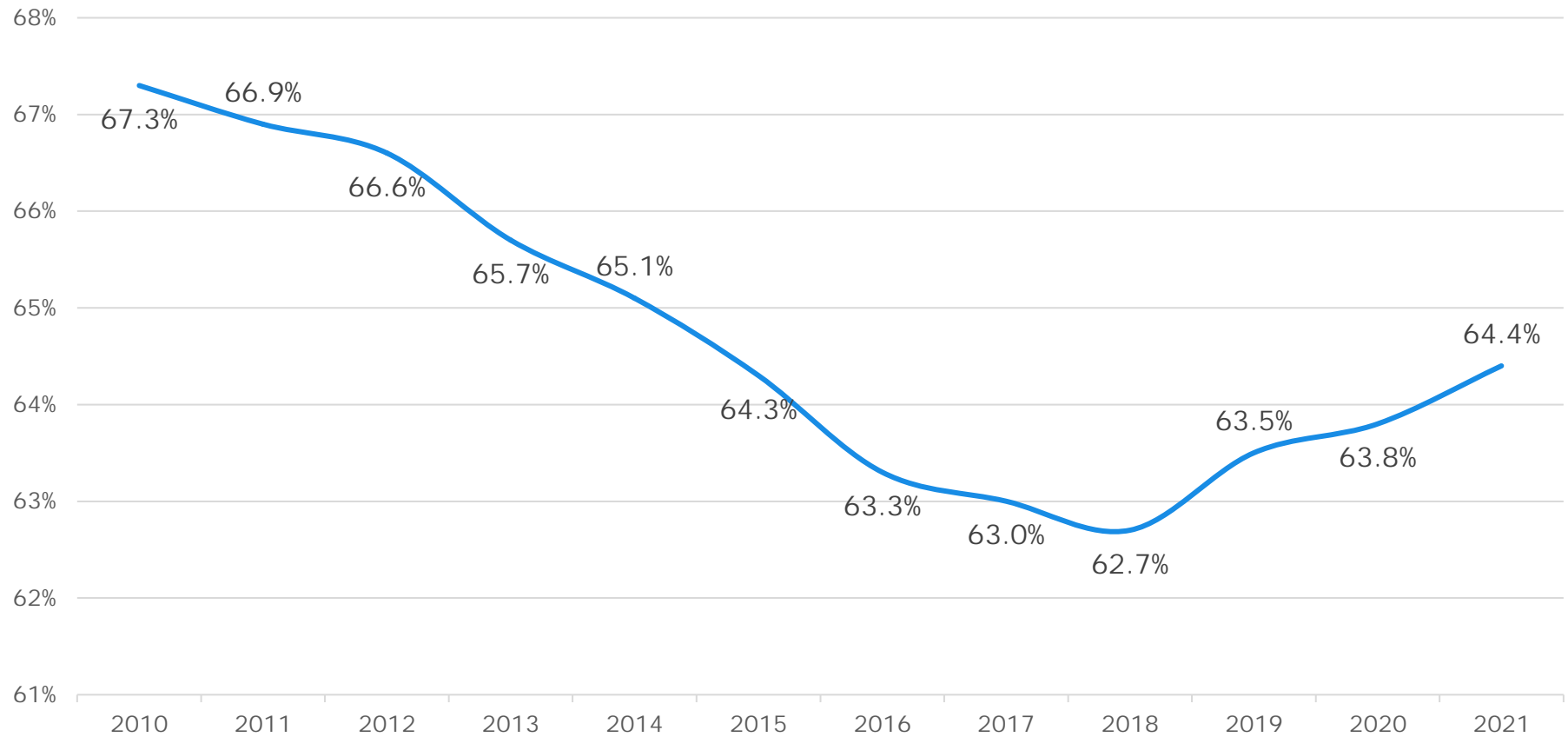


Source: US Bureau of Labor Statistics



Labor force

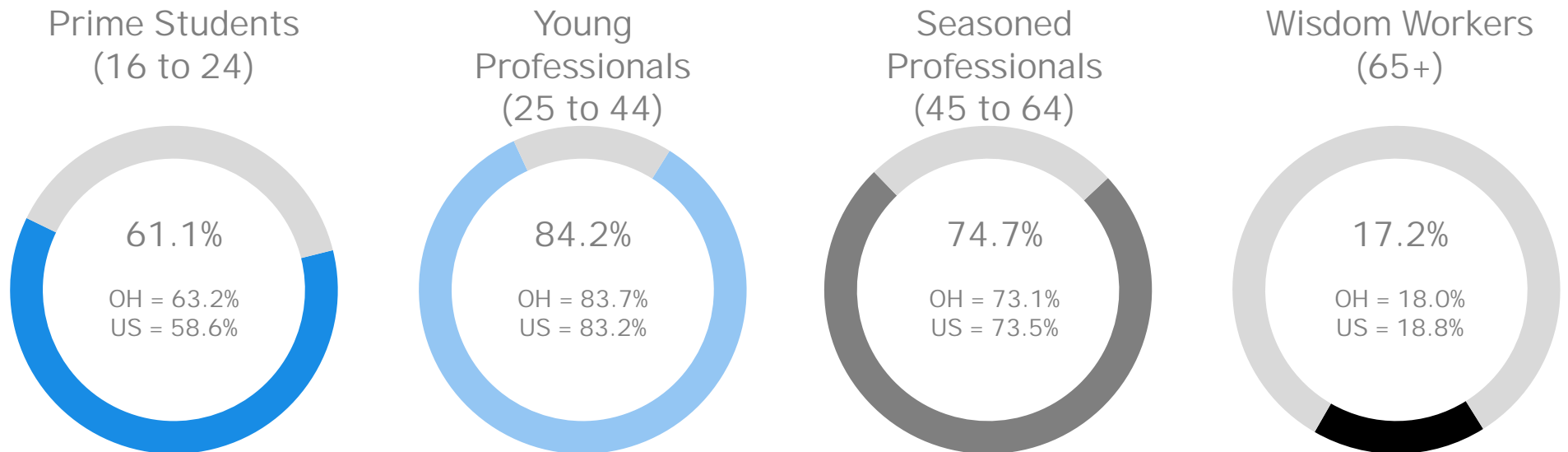
Labor force participation rate, 2010 - 2021



Source: US Census Bureau

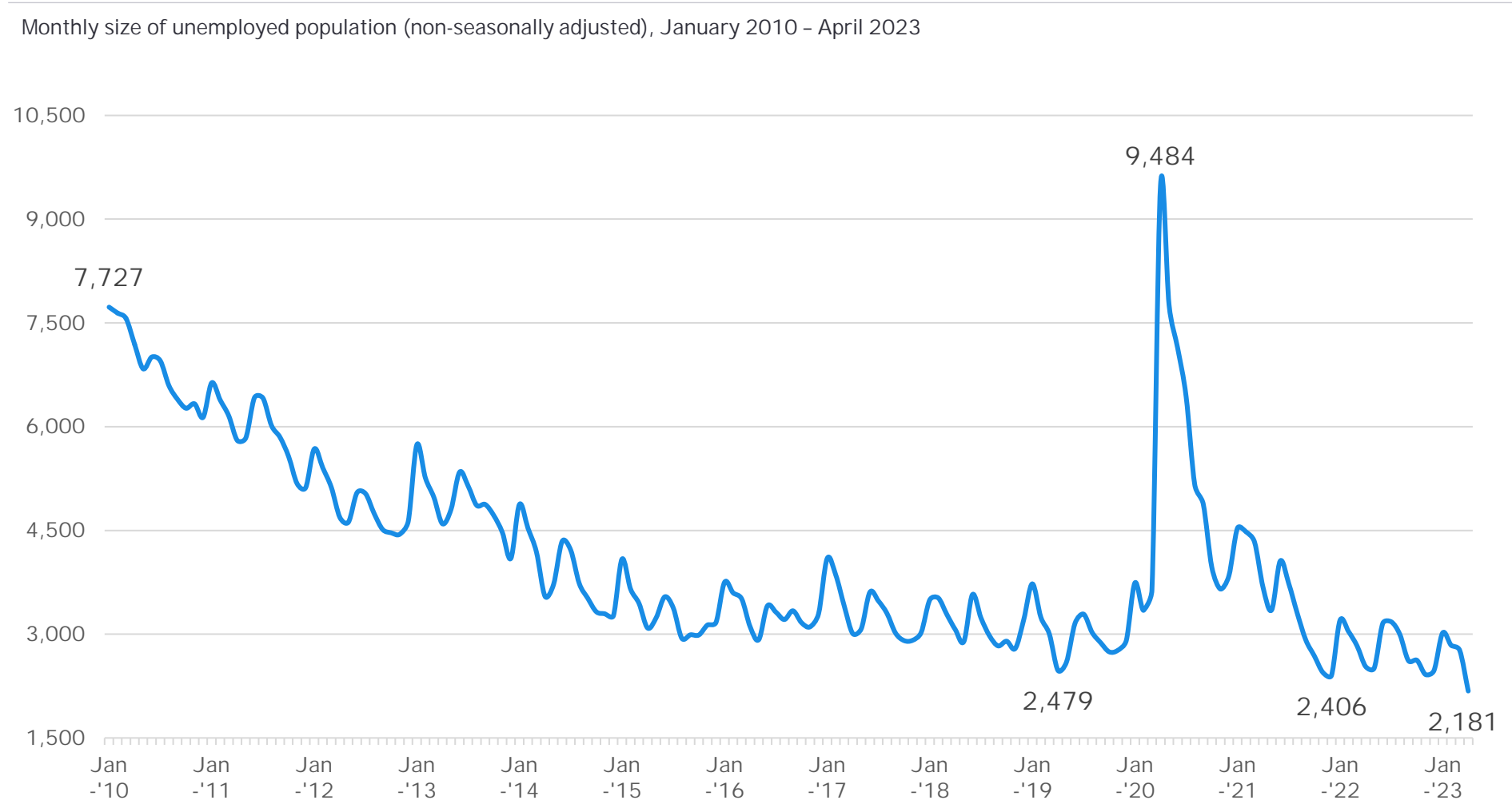
Labor force

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



Source: US Census Bureau

Unemployment

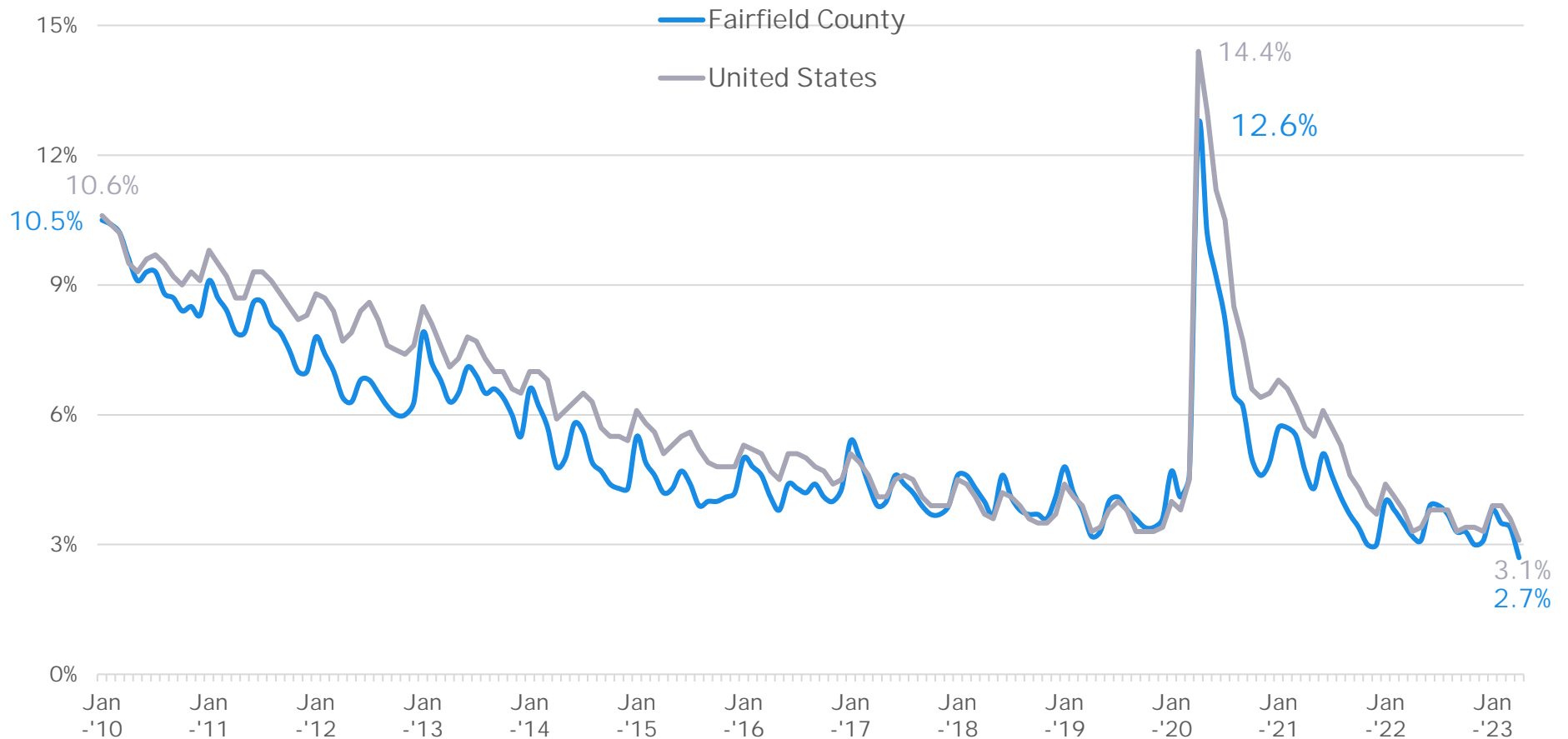


Source: US Bureau of Labor Statistics



Unemployment rate

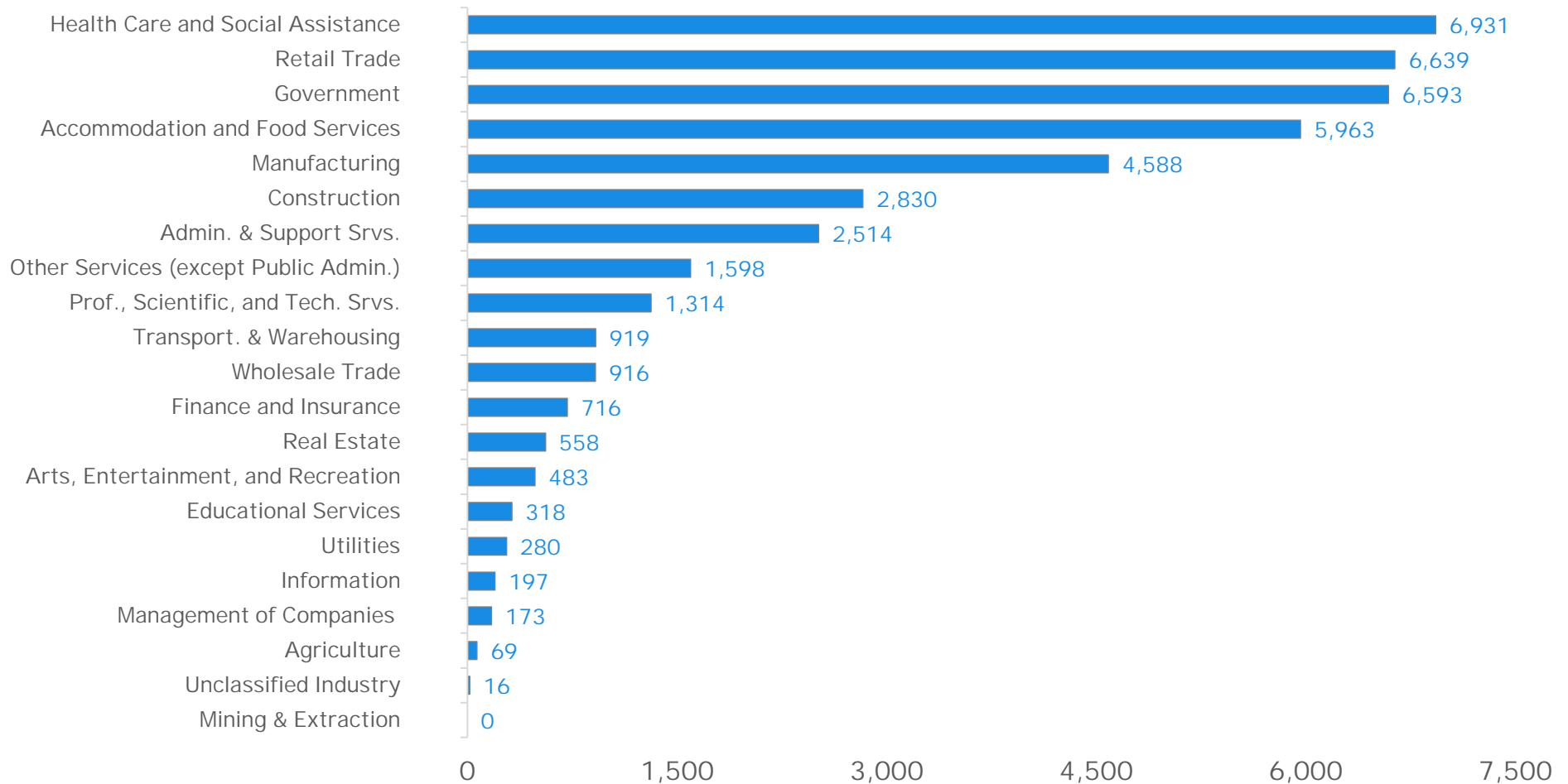
Monthly unemployment rate (non-seasonally adjusted), January 2010 – April 2023



Source: US Bureau of Labor Statistics

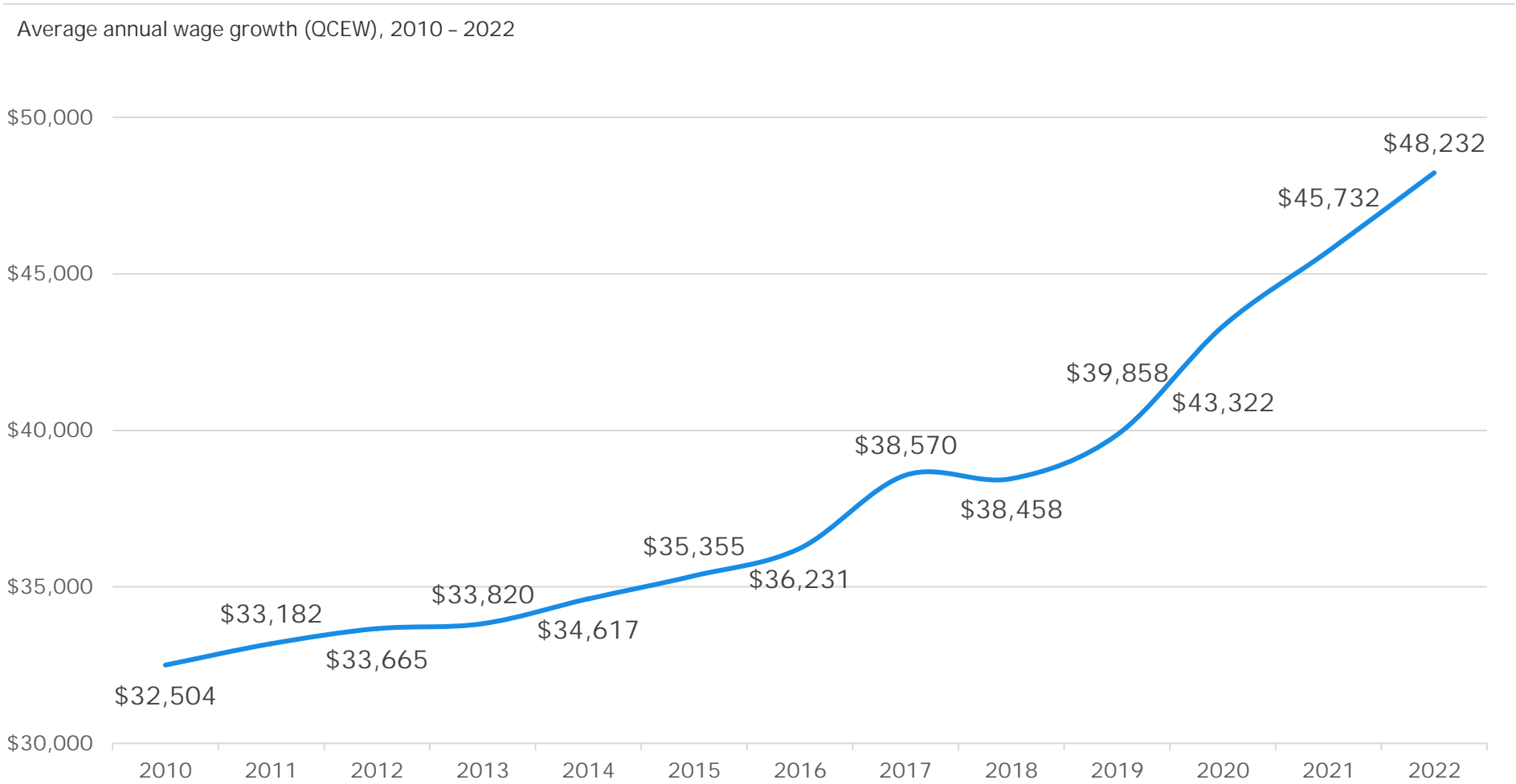
Employment by industry

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



Source: Lightcast

Average wage growth

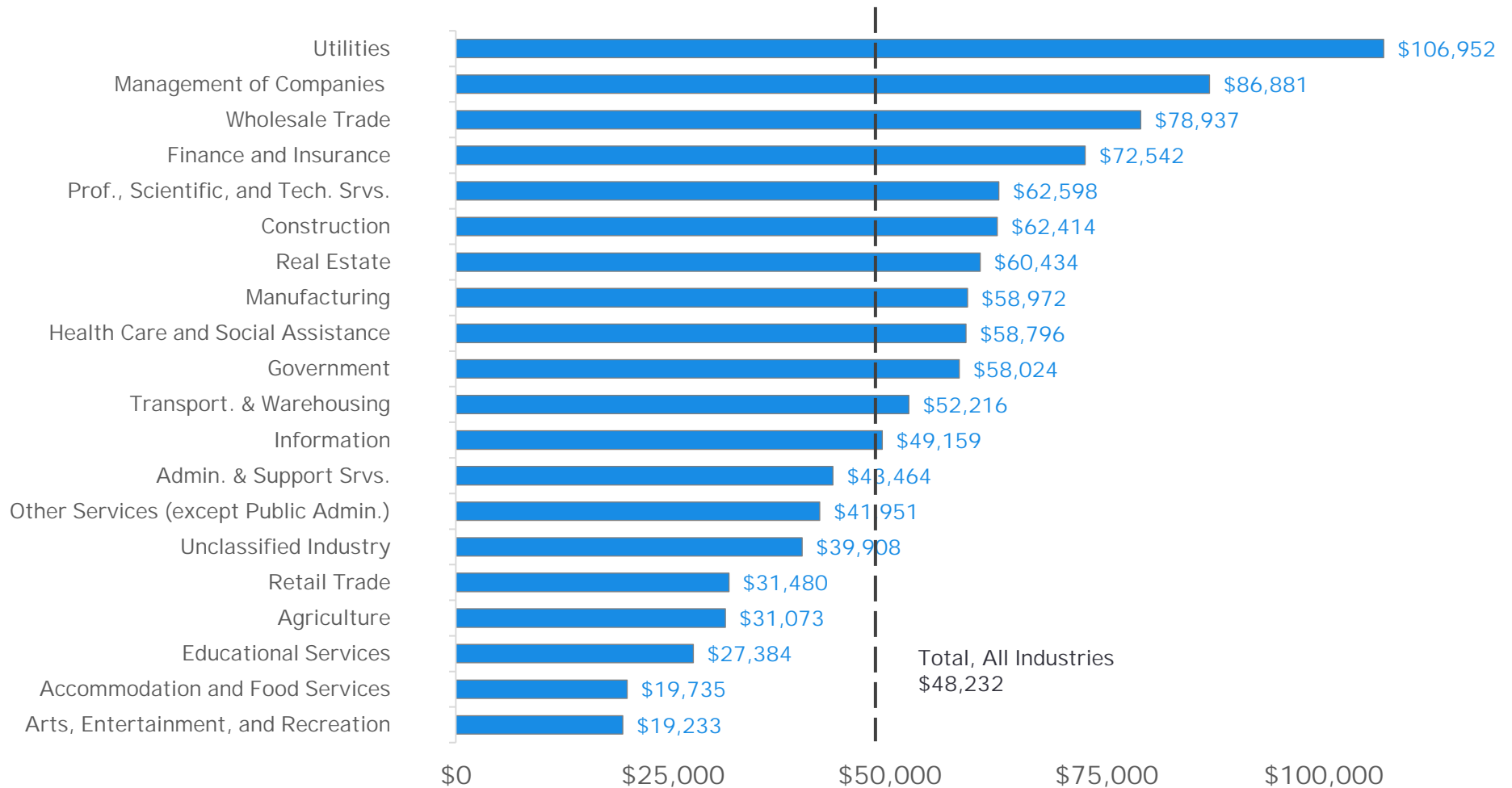


Source: Lightcast



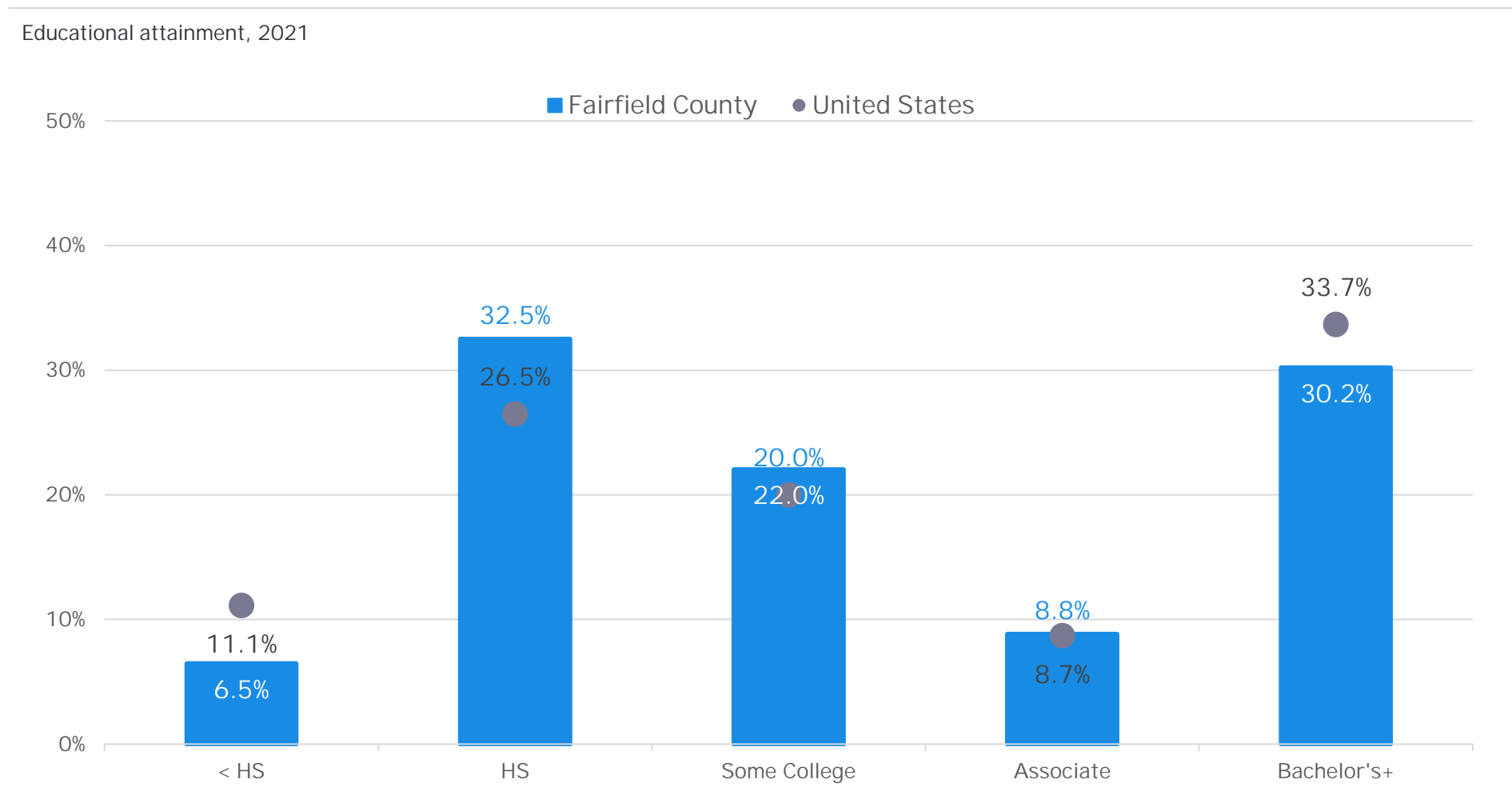
Wage by industry

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



Source: Lightcast

Educational attainment

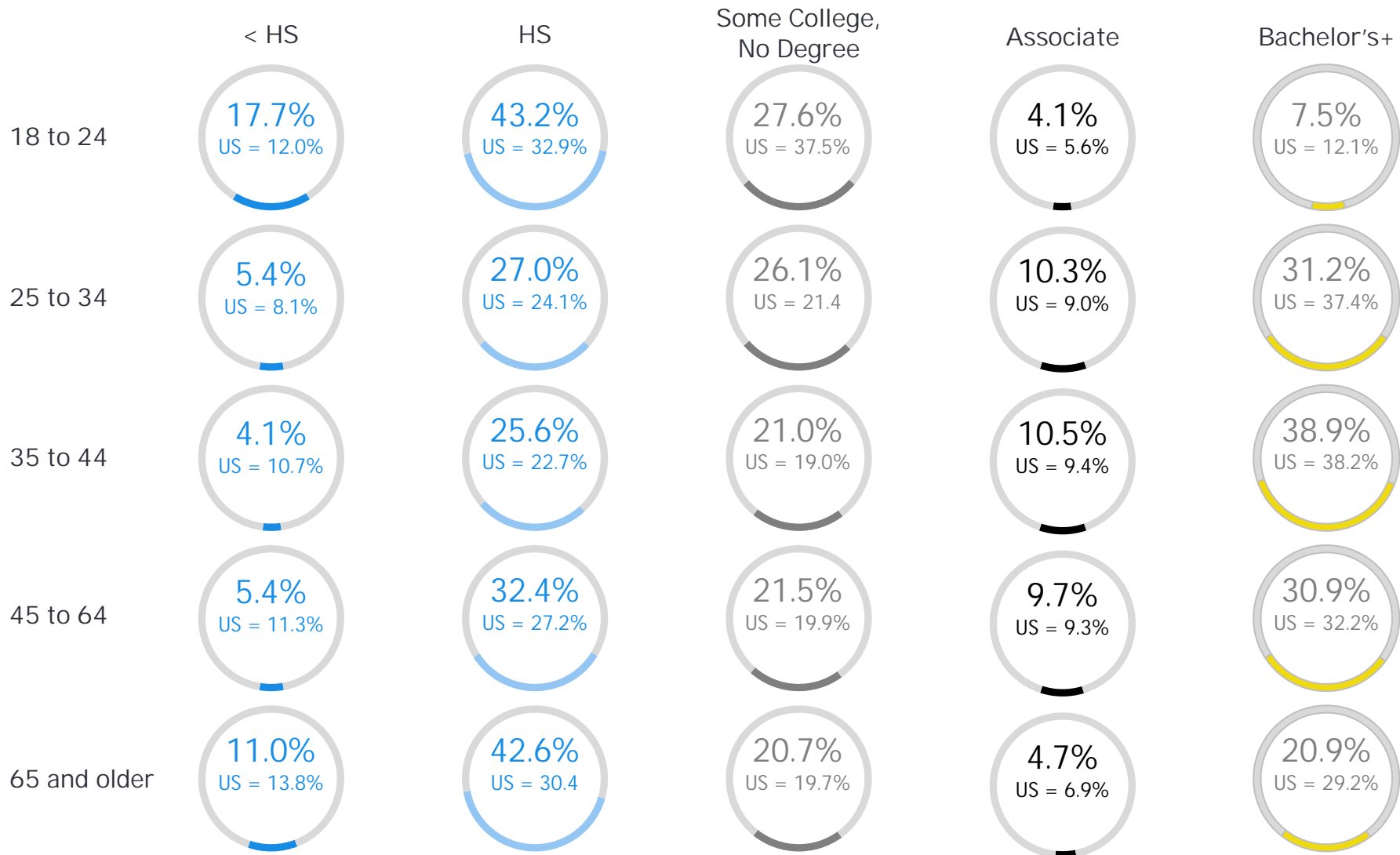


Source: US Census Bureau



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 half of industry clusters experienced job growth in Fairfield County. Construction Services saw the largest gains in net new jobs among clusters. Aerospace is a small but emerging in the county, having no presence in 2017 to 117 jobs in 2022. The largest clusters in terms of total jobs, Retail, Healthcare, and Hospitality, all saw slight declines between 2017 and 2022 but remained more concentrated than across the U.S. Industrial Products and Automotive were the most concentrated clusters for employment in 2022.

Fairfield 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)
Construction Svcs.	2,817	30.9%	1.3	Retail	6,730	0.0%	1.4
Industrial Products	1,421	1.2%	2.2	Healthcare	6,003	-5.4%	1.2
Personal Services	1,335	9.8%	1.2	Hospitality	5,963	-4.9%	1.4
Metalworking	904	81.5%	1.6	Education	3,925	-7.7%	1.0
Automotive	665	13.4%	2.2	Back Office	2,442	-19.9%	0.8
Industrial Machinery	634	18.9%	1.4	Creative Content	484	-10.7%	0.8
Furniture Mfg.	181	12.8%	1.6	Entertainment	454	-9.1%	0.6
Government	3,103	4.9%	0.9	Agribusiness & Food	447	-28.6%	0.5
Financial Svcs.	1,154	3.2%	0.5	Energy	285	-45.2%	0.8
Wholesale Trade	1,015	9.7%	0.5	Transportation	140	-32.6%	0.4
Professional Services	1,012	26.4%	0.8	Aerospace	117	100%*	0.7
Non-Profits & Social Svc.	990	3.5%	0.7	Telecom Services	61	-26.7%	0.3
Distribution & Logistics	751	1.6%	0.6	Consumer Products	37	-31.4%	0.2
Software / Info. Tech.	156	17.1%	0.2	Apparel & Textiles	12	100%*	0.1
Research	106	16.0%	0.2	Shipbuilding	--	--	--
Electronics	45	5.2%	0.1	Mining & Logging	--	--	--
Biomedical R&D/Mfg	22	25.5%	0.1	Total	43,622	-0.2%	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 declines than growth in Fairfield County. The Hospitality cluster experienced the largest decrease in number of jobs among clusters, losing approximately 1,100 jobs, or 11.5% of jobs. Despite this trend, Hospitality remained the largest cluster in terms of total employment and the most concentrated cluster. Sales & Marketing, Business, Construction, and Production clusters all saw double digit growth between 2017 and 2022.

Fairfield County's occupational cluster performance

Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)	Cluster	Employment (2022)	Employment growth (2017-2022)	Location quotient (2022)
Production	2,895	12.0%	1.1	Personal Services	4,743	-1.2%	1.2
Construction	2,035	19.0%	1.1	Logistics	4,206	-3.7%	1.0
Mechanics	1,750	6.8%	1.0	Education	3,213	-6.7%	1.2
Back Office	5,092	3.0%	0.8	Financial	759	0.0%	0.5
Social Service	1,914	6.7%	0.9	Engineering	442	-16.8%	0.5
Business	1,419	52.2%	0.7	Performance	124	-7.6%	0.8
Computer	728	7.4%	0.4	Communications	108	-0.9%	0.5
Legal	203	1.2%	0.6	Agriculture	99	-7.0%	0.3
Sales & Marketing	197	53.3%	0.6	Plant Operators	79	-30.5%	0.7
Design	176	4.7%	0.7	Math	28	-18.0%	0.3
Geology	48	9.1%	0.8	Political	24	-31.8%	0.6
Hospitality	8,389	-11.5%	1.5	Architecture	16	0.0%	0.3
Medical	5,128	-1.8%	1.1	Total	43,622	-0.2%	1.0

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Weak but Advancing

Strong but Declining

Weak & Declining

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 clusters in terms of 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. The cluster also saw the largest net gains in workers between 2017 and 2022. Overall, Fairfield County saw an increase of more than 3,000 resident workers from 2017 to 2022.

Fairfield 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	9,246	27.1%	1.4	Back Office	9,040	-0.8%	1.0
Medical	7,851	6.2%	1.0	Hospitality	8,538	-8.2%	1.0
Production	3,990	3.8%	1.0	Personal Services	5,918	-5.2%	1.0
Social Service	3,343	8.9%	1.0	Education	4,467	-1.9%	1.1
Construction	2,960	13.0%	1.1	Financial	1,705	-0.4%	0.8
Mechanics	2,683	4.0%	1.0	Engineering	888	-13.9%	0.6
Business	2,737	47.7%	0.8	Communications	184	-15.8%	0.6
Computer	1,973	9.1%	0.8	Performance	152	-14.6%	0.6
Legal	413	1.9%	0.7	Plant Operators	142	-2.5%	0.8
Sales & Marketing	368	14.8%	0.7	Math	96	-5.1%	0.7
Design	306	18.8%	0.7	Political	56	-4.1%	0.9
Agriculture	122	2.3%	0.2	Architecture	41	-14.2%	0.5
Geology	44	22.2%	0.5	Total	67,301	4.7%	1.0

Strong & Advancing

Weak but Advancing

Strong but Declining

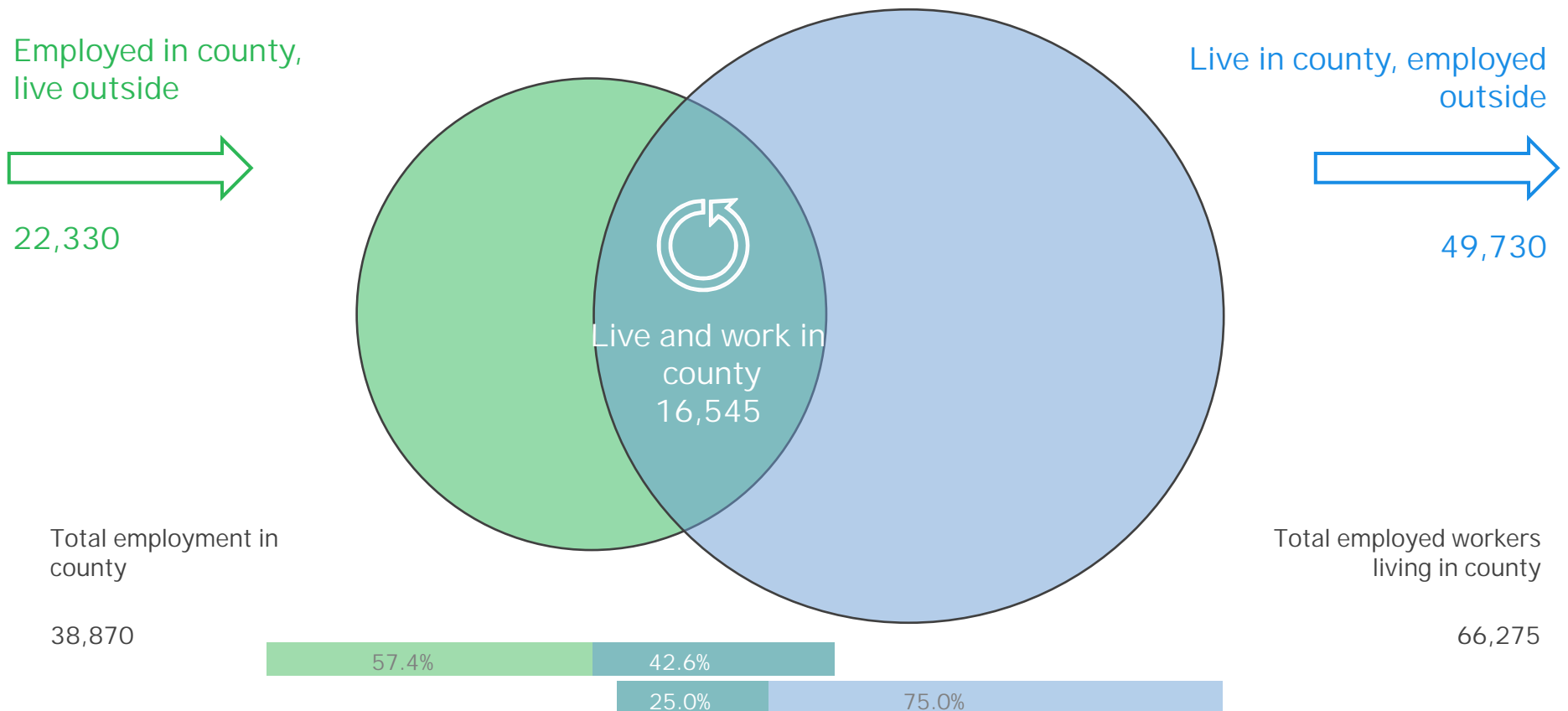
Weak & Declining

Source: Lightcast

Inflow/outflow analysis

While Fairfield County both imports and exports talent, there is a larger outflow of talent overall. Of the 66,275 employed individuals residing in the county, 75% are employed outside of the county. At the same time, approximately 57% of workers employed in the county live elsewhere outside of the county.

Fairfield County workforce inflow/outflow dynamics, 2020

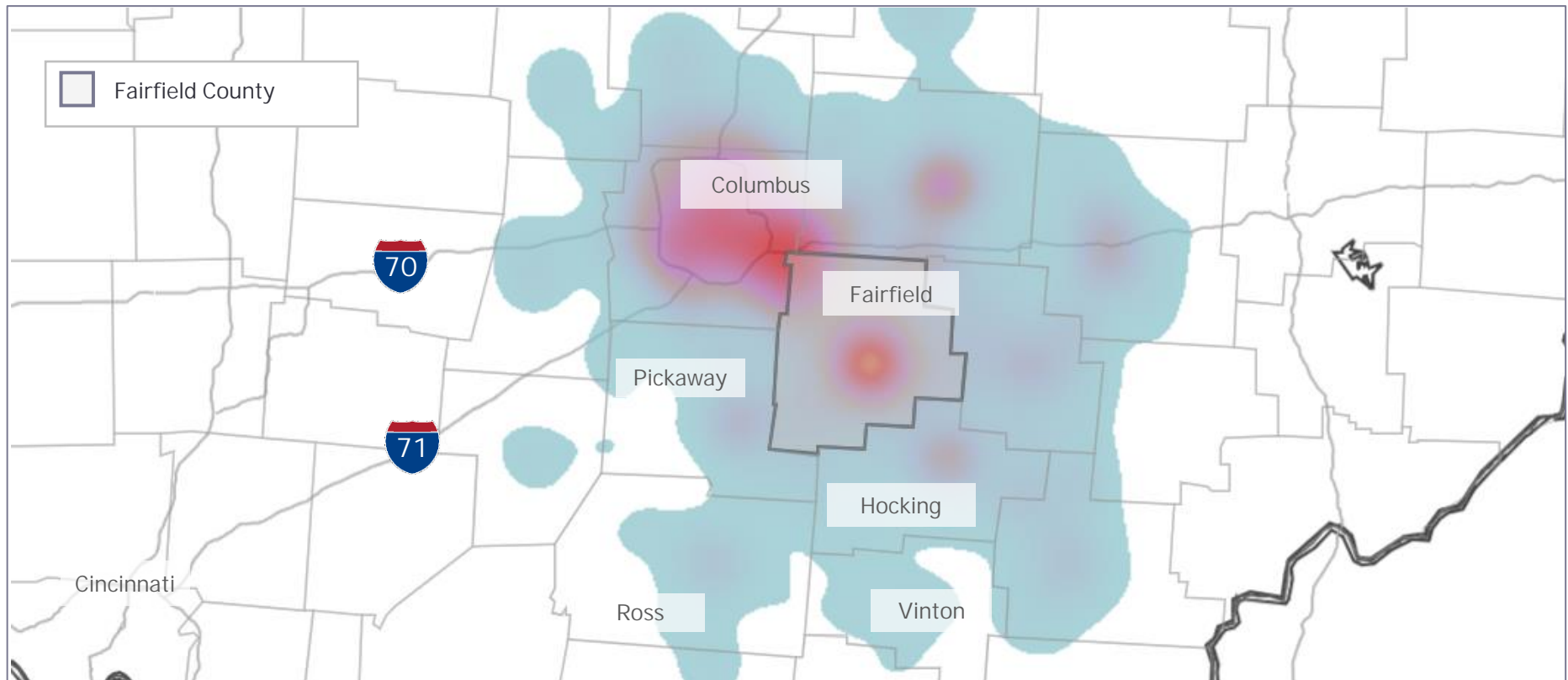


Source: US Census Bureau

Fairfield County worker origin

The map below shows the origins of workers for the Fairfield County. The area shown below accounts for approximately 84% of the labor shed for the county, or 32,650 workers. Given the proximity to Franklin County, it is unsurprising that many of Fairfield County's workers commute in from Franklin.

Fairfield County's worker origin, 2020

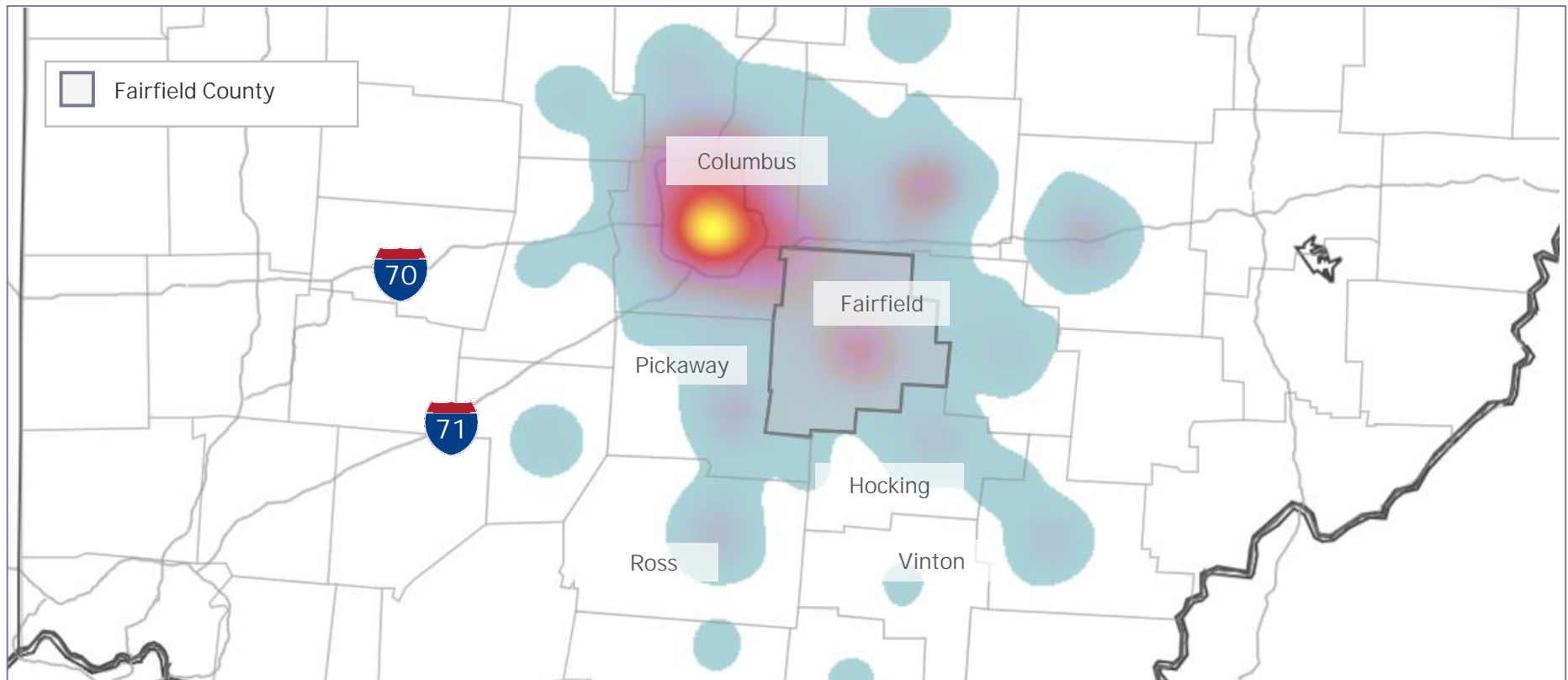


Source: US Census Bureau

Fairfield County's resident worker destinations

The map below shows the work destinations of resident workers in Fairfield County. The area shown below accounts for nearly 57,000 resident workers, or 86% of the county's resident workforce. Just as Franklin County is a hotspot for worker origin into Fairfield County, it is also a hotspot for resident workers commuting out of the county for work.

Fairfield County's resident worker destinations, 2020

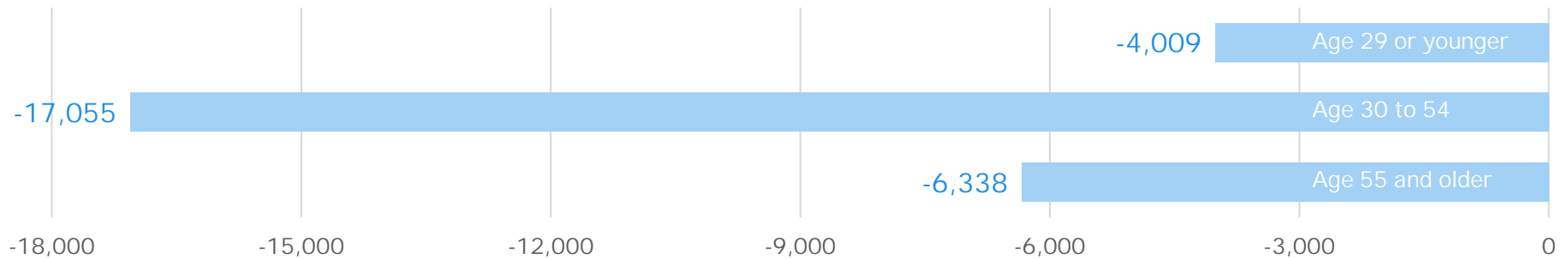


Source: US Census Bureau

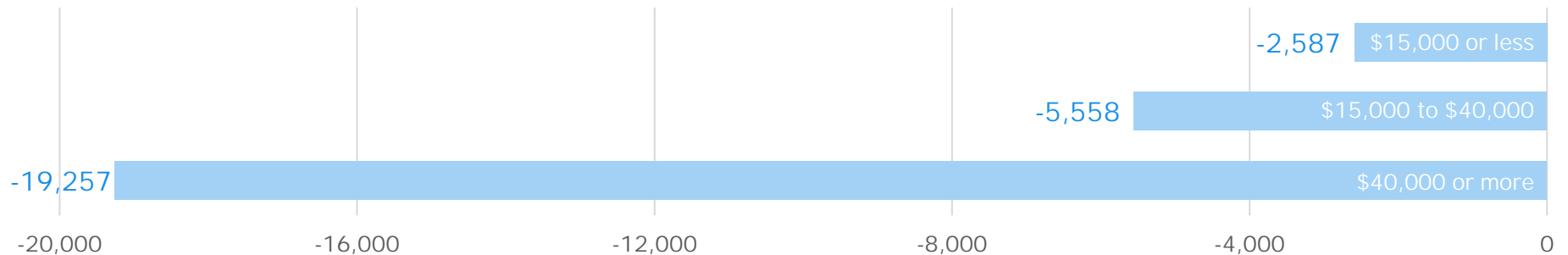
Inflow/outflow of workers by age and earnings

Fairfield 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 Fairfield County by age, 2020



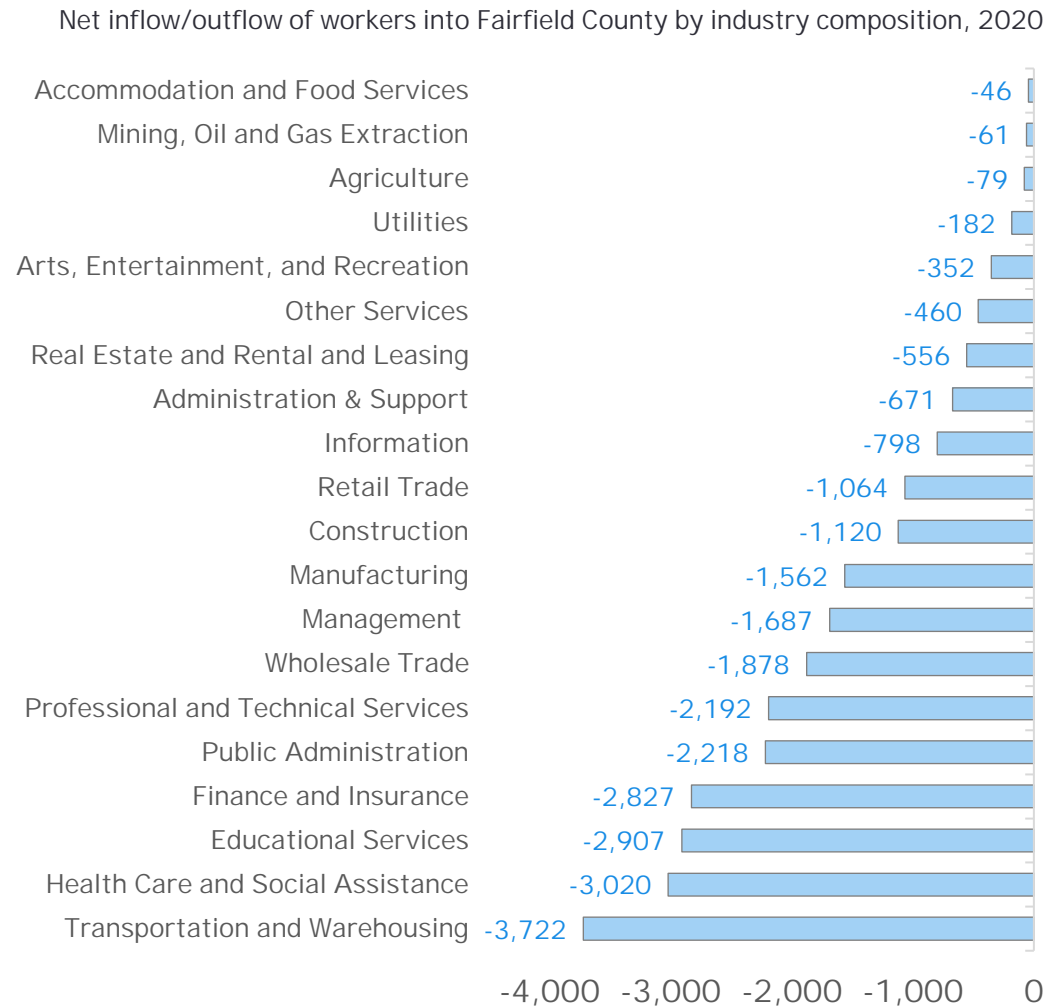
Net inflow/outflow of workers into Fairfield County by earnings, 2020



Source: US Census Bureau

Net inflow of workers by industry

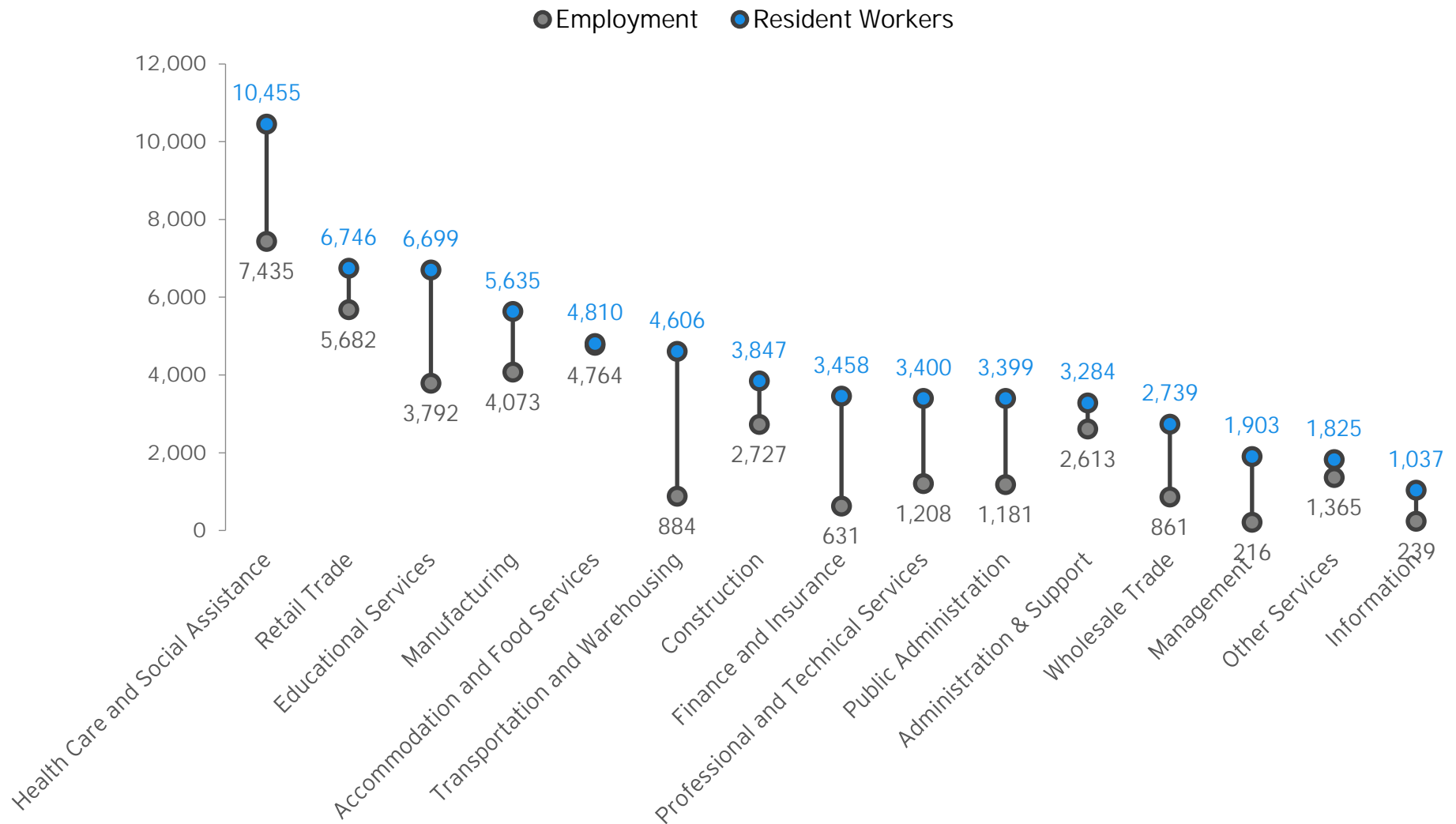
Fairfield County is a net exporter of talent across all observed industries, where the number of resident workers in each industry exceeds the number of jobs. For example, Fairfield County is home to approximately 3,720 more workers employed in Transportation and Warehousing compared to the number of jobs in the industry located within in the county. Other major industries in which Fairfield County is an exporter of talent include Health Care and Social Assistance, Education, Finance and Insurance, and Public Administration.



Source: US Census Bureau

Industry composition by worker origin

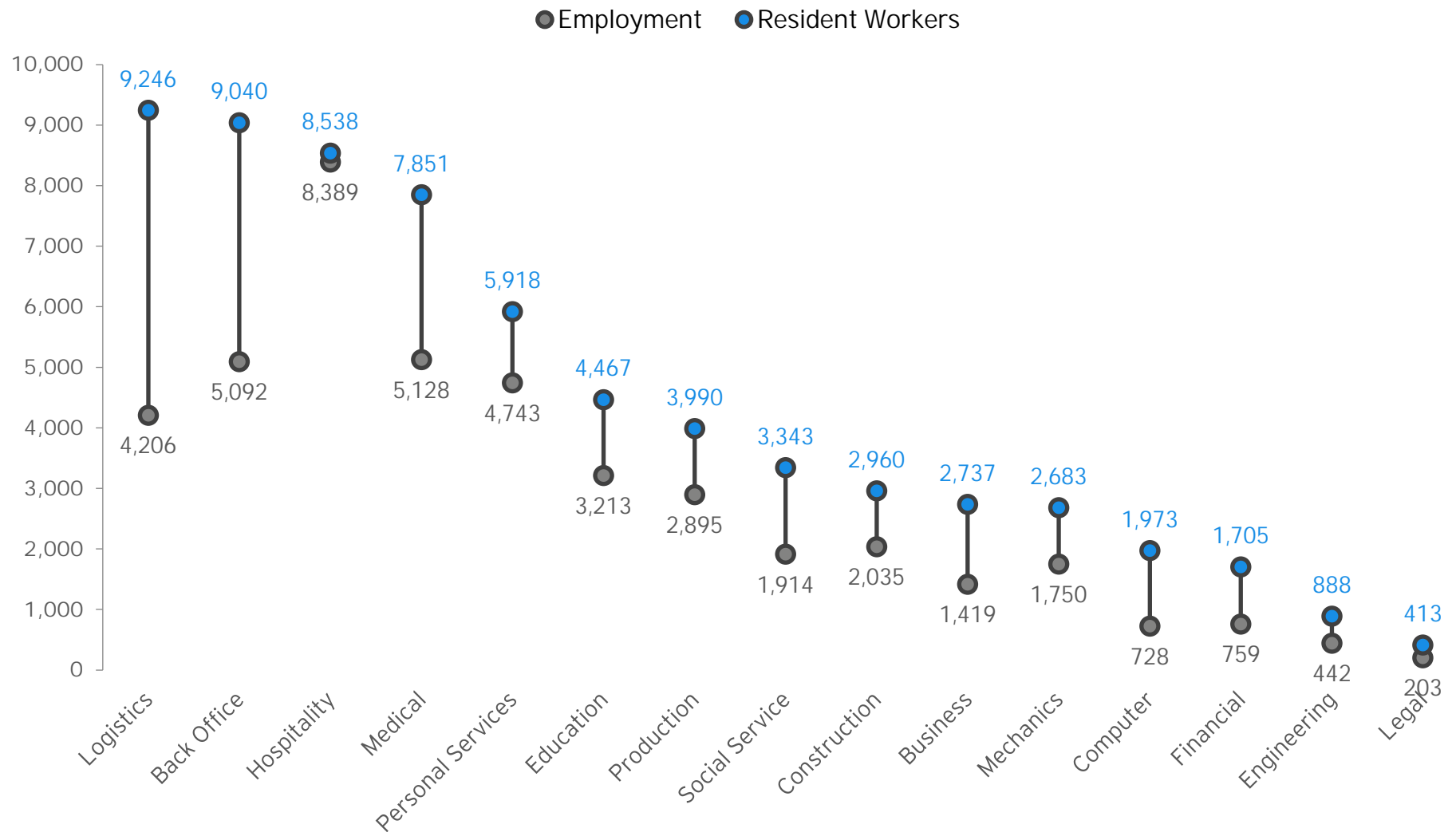
Fairfield County's employment versus resident workers for top 15 industry clusters, 2020



Source: US Census Bureau

Occupation composition by worker origin

Fairfield County's employment versus resident workers for top 15 occupational clusters, 2021



Source: Lightcast

Forecasted growth in industry composition

In the table below, we examine possible employment forecasts for industry clusters in Fairfield County. Large job clusters, such as Hospitality, Construction Services, and Healthcare are forecasted to have continued growth over the course of the next two and ten years and are likely to drive net gains in employment in the county. Overall, the county is forecasted to add 2,500 jobs over the next decade, growing by 5.7%. Aerospace and Automotive are forecasted to have notable gains over the next ten years.

Fairfield 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	117	154	222	Healthcare	6,003	6,108	6,334
Agribusiness & Food	447	489	550	Hospitality	5,963	6,176	6,524
Apparel & Textiles	12	16	21	Industrial Products	1,421	1,372	1,217
Automotive	665	770	923	Industrial Machinery	634	671	715
Back Office	2,442	2,286	1,911	Metalworking	904	1,021	1,220
Biomedical R&D/Mfg	22	22	22	Mining & Logging	--	--	--
Construction Svcs.	2,817	2,972	3,188	Non-Profits & Social Service	990	1,059	1,235
Consumer Products	37	41	48	Personal Services	1,335	1,391	1,498
Creative Content	484	498	508	Professional Services	1,012	1,079	1,196
Distribution & Logistics	751	789	830	Research	106	112	119
Education	3,925	3,923	3,927	Retail	6,730	6,795	6,739
Electronics	45	49	56	Shipbuilding	--	--	--
Energy	285	284	293	Software / Info. Tech.	156	160	164
Entertainment	454	506	574	Telecom Services	61	55	45
Financial Svcs.	1,154	1,175	1,182	Transportation	140	148	161
Furniture Mfg.	181	205	245	Wholesale Trade	1,015	1,074	1,171
Government	3,103	3,117	3,144	Total	43,622	44,691	46,122

Source: Lightcast

Forecasted growth in occupational composition

In the table below, we examine possible employment forecasts for occupational clusters at the county level. Despite lackluster growth between 2017 and 2022, over the next decade, all but three clusters are forecasted to experience growth. The Medical, Hospitality, Production, and Logistics clusters are anticipated to experience the largest net new jobs created in Fairfield County over the next decade. The Engineering cluster is forecasted to grow at a faster pace among clusters over the next ten years.

Fairfield 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	99	101	103	Legal	203	210	222
Architecture	16	16	16	Logistics	4,206	4,324	4,485
Back Office	5,092	5,164	5,130	Math	28	29	37
Business	1,419	1,469	1,551	Mechanics	1,750	1,832	1,950
Communications	108	111	118	Medical	5,128	5,252	5,525
Computer	728	748	783	Performance	124	128	139
Construction	2,035	2,142	2,282	Personal Services	4,743	4,789	4,767
Design	176	186	185	Plant Operators	79	81	82
Education	3,213	3,224	3,265	Political	24	24	24
Engineering	442	462	515	Production	2,895	3,058	3,258
Financial	759	785	827	Sales & Marketing	197	202	208
Geology	48	48	40	Social Service	1,914	1,946	2,020
Hospitality	8,389	8,552	8,767	Total	43,622	44,691	46,122

Source: Lightcast

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