Fairfield County economic and background assessment
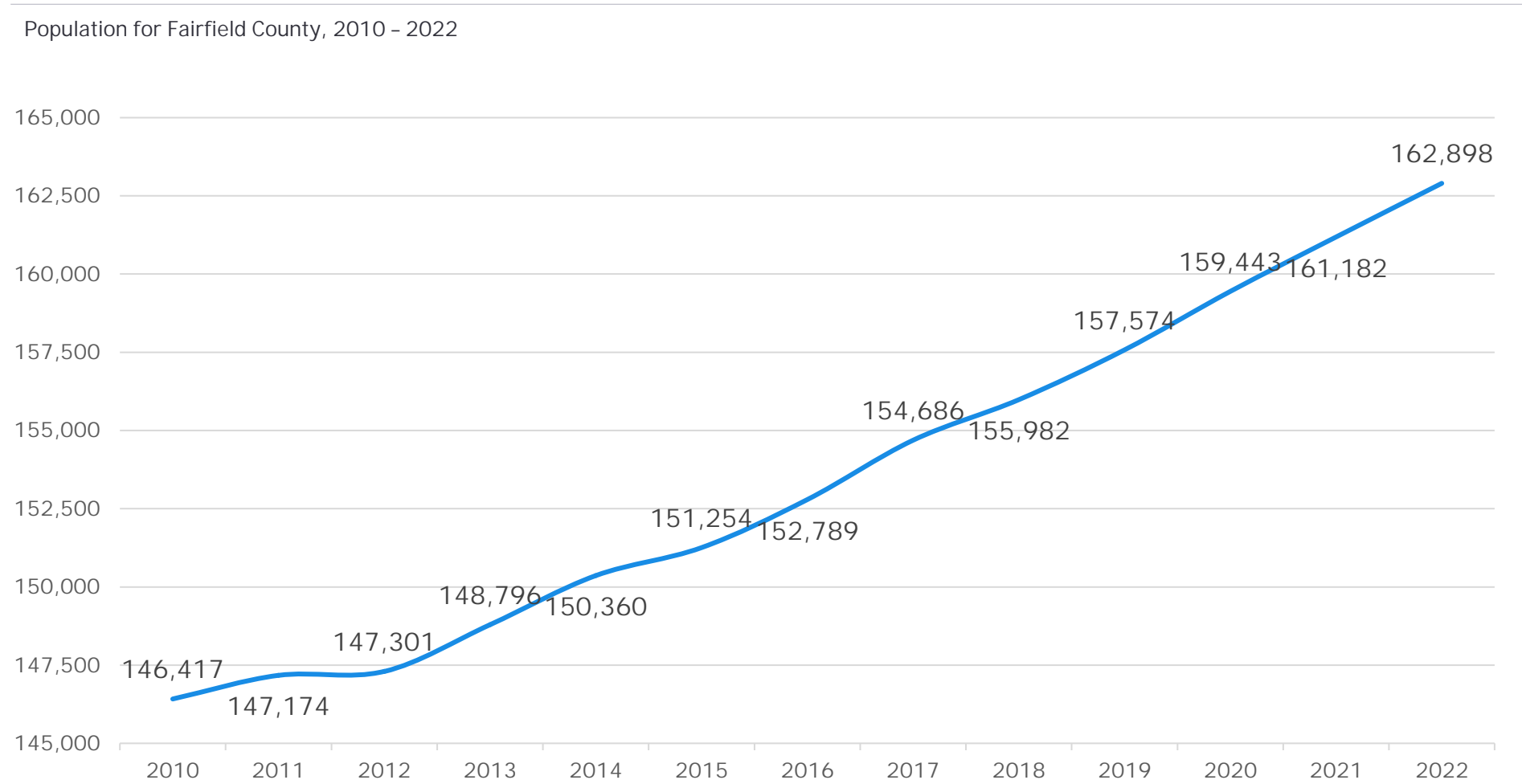
Prepared for: South Central Ohio Workforce Partnership

July, 2023

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Building a better working world
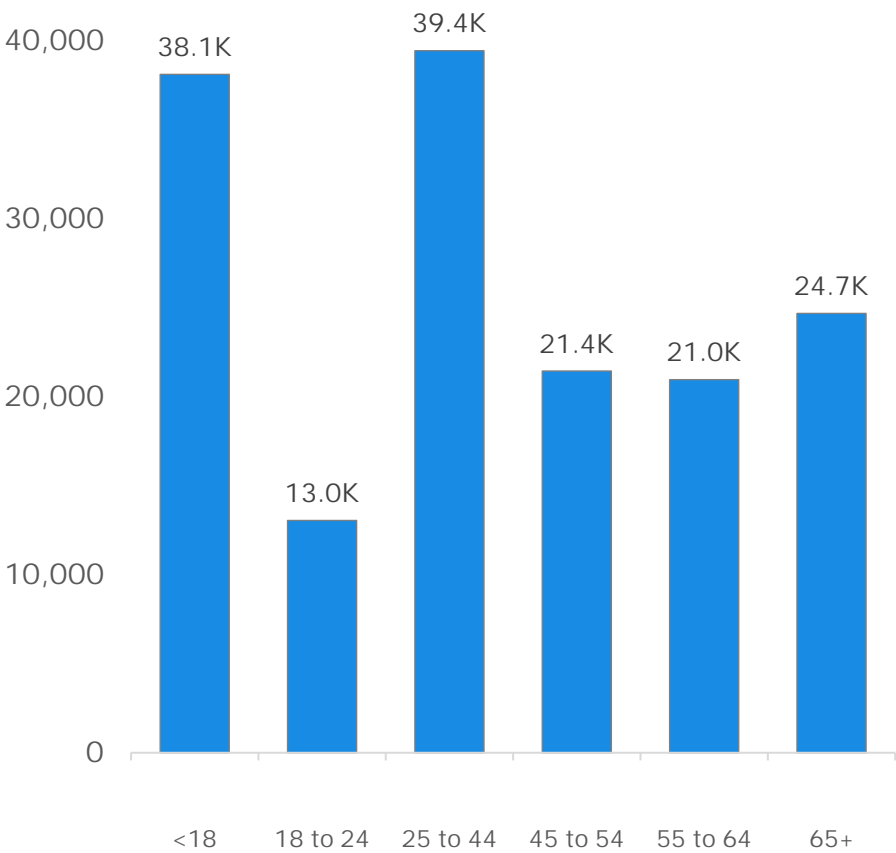
Population

Population for Fairfield County, 2010 – 2022

162,898

159,443 161,182

157,574

154,686

155,982

151,254 152,789

148,796 150,360

147,301

146,417

147,174

165,000

162,500

160,000

157,500

155,000

152,500

150,000

147,500

145,000

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

Source: US Census Bureau

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Population by age

Population by age cohort, 2021

	<18	18 to 24	25 to 44	45 to 54	55 to 64	65+
	38.1K	13.0K	39.4K	21.4K	21.0K	24.7K

Share of population by age cohort, 2021

■ Fairfield County
● US

	<18	18 to 24	25 to 44	45 to 54	55 to 64	65+
Fairfield County	24.2%	8.3%	25.0%	13.6%	13.3%	16.0%
US	22.5%	9.2%	26.6%	12.6%	13.0%	15.7%

Source: US Census Bureau

EY
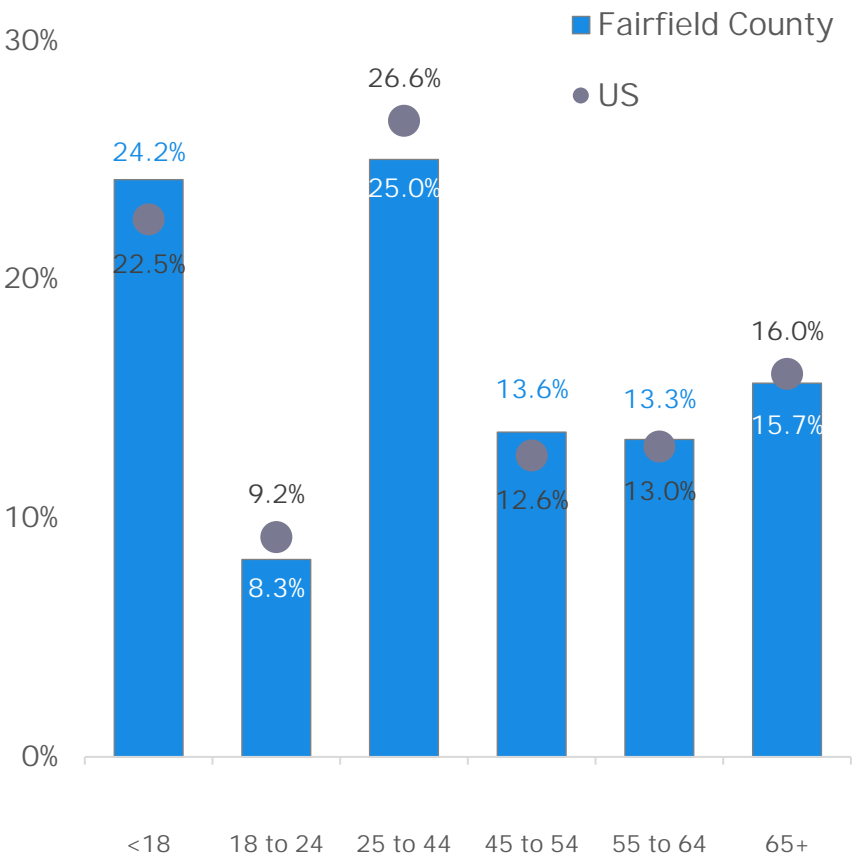
Population by race

Population by race cohort, 2021
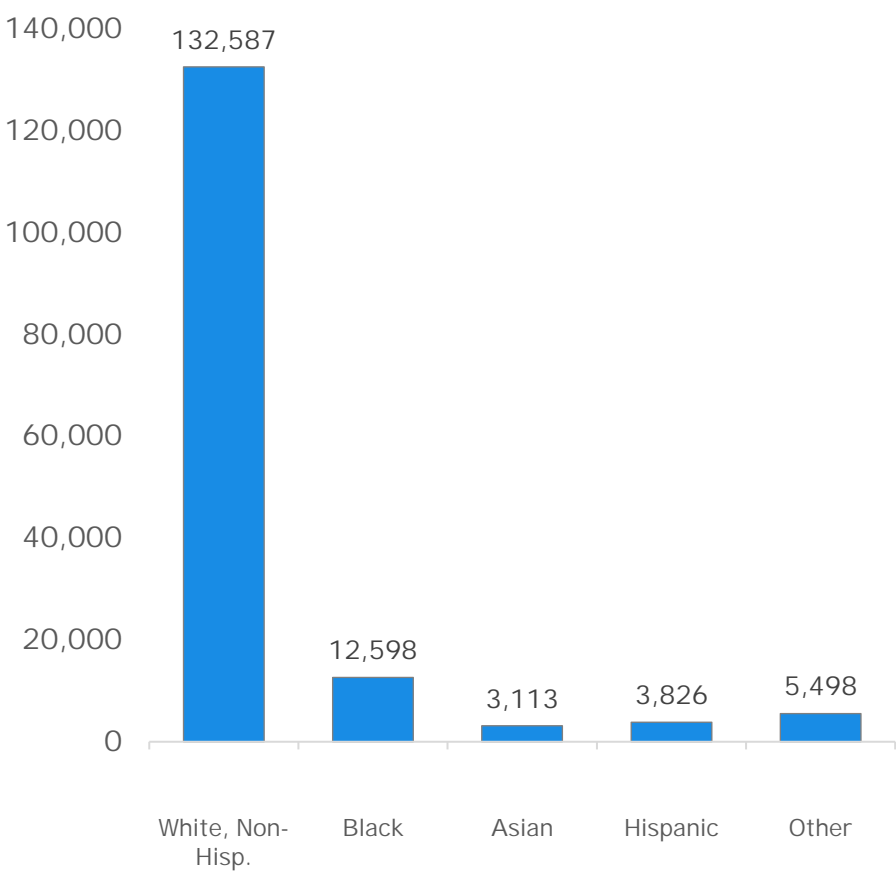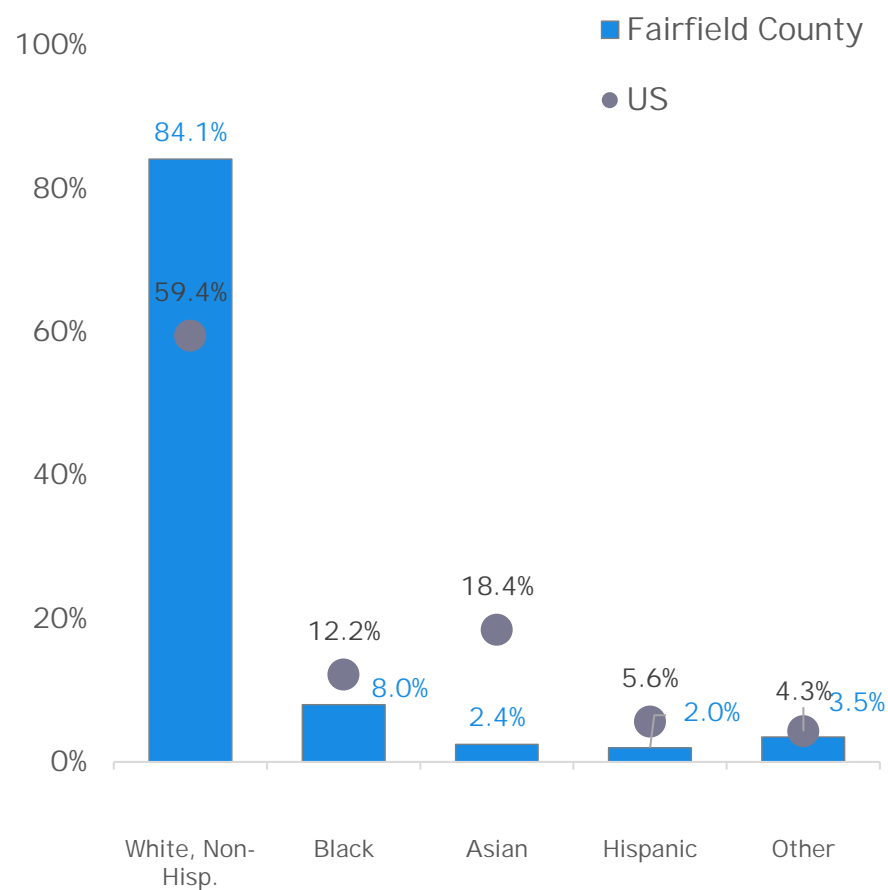
Race	Population
White, Non-Hisp.	132,587
Black	12,598
Asian	3,113
Hispanic	3,826
Other	5,498

Share of population by race cohort, 2021

■ Fairfield County
● US

Race	Fairfield County	US
White, Non-Hisp.	84.1%	59.4%
Black	8.0%	12.2%
Asian	2.4%	18.4%
Hispanic	2.0%	5.6%
Other	3.5%	4.3%

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Labor force

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

Source: US Bureau of Labor Statistics

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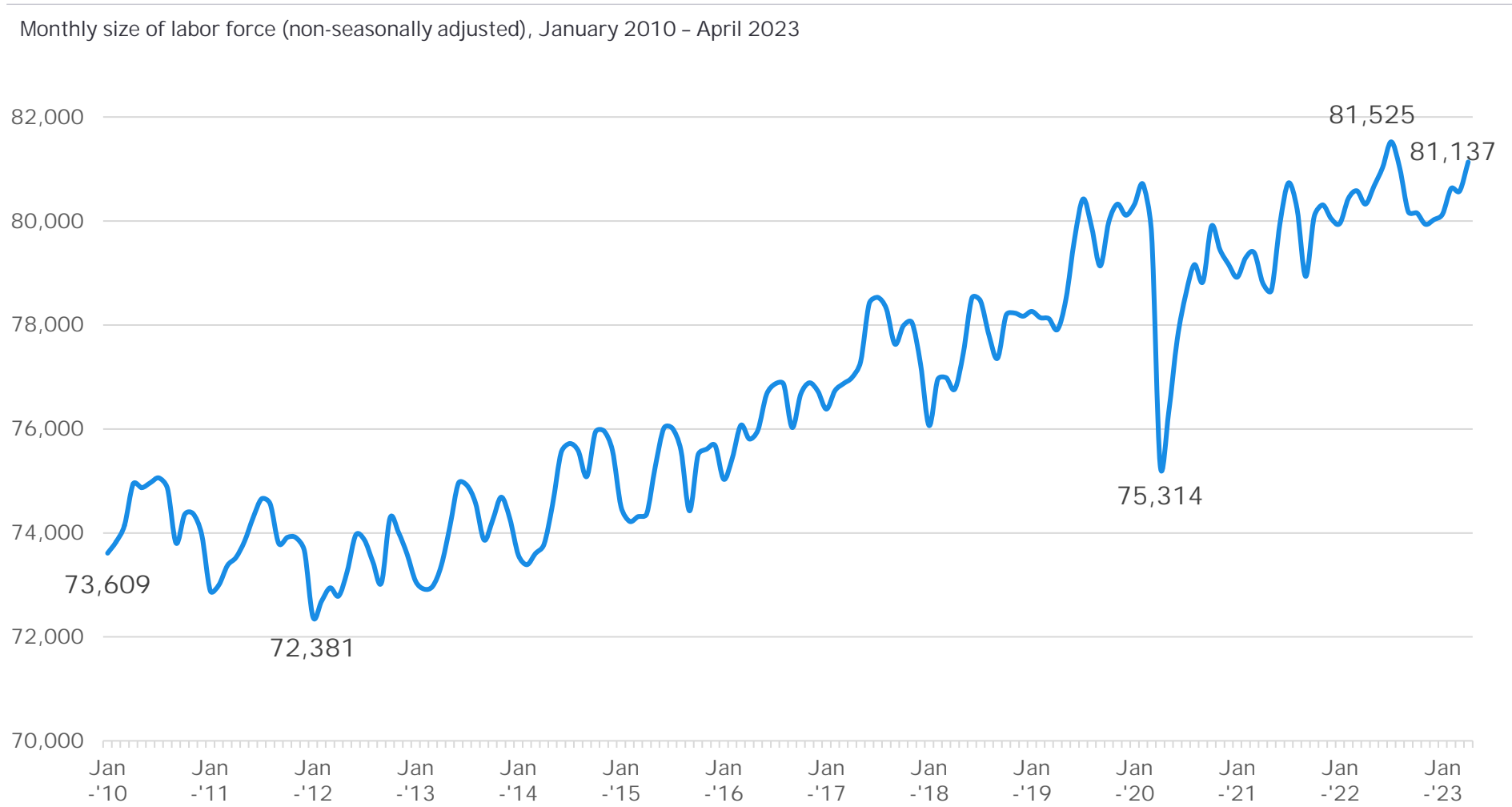
Labor force

Labor force participation rate, 2010 – 2021

67.3%
66.9%
66.6%
65.7%
65.1%
64.3%
63.3%
63.0%
62.7%
63.5%
63.8%
64.4%

Source: US Census Bureau

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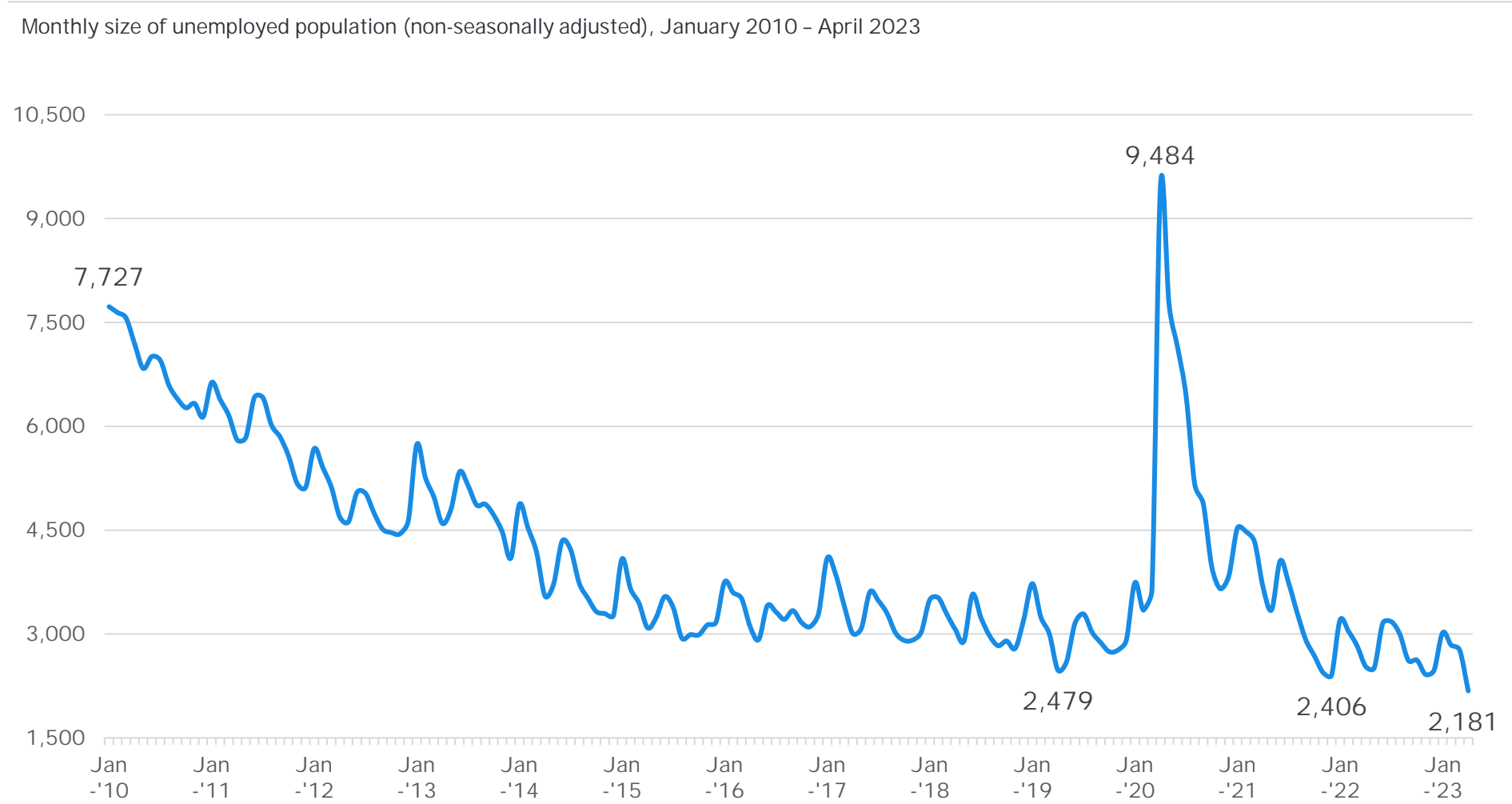
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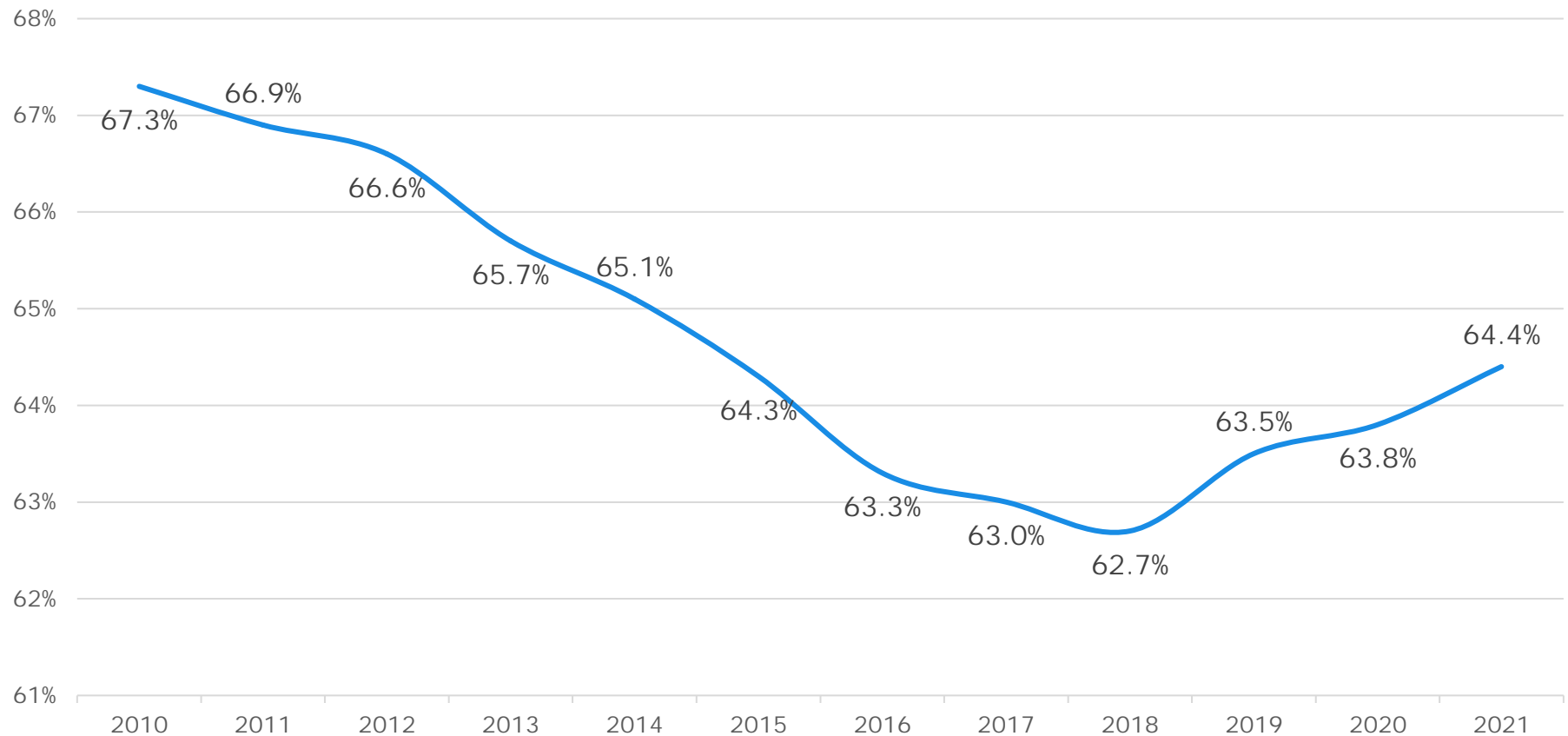
Labor force

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

Prime Students (16 to 24)	Young Professionals (25 to 44)	Seasoned Professionals (45 to 64)	Wisdom Workers (65+)
61.1%	**84.2%**	**74.7%**	**17.2%**
OH = 63.2%	OH = 83.7%	OH = 73.1%	OH = 18.0%
US = 58.6%	US = 83.2%	US = 73.5%	US = 18.8%

Source: US Census Bureau

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Unemployment

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

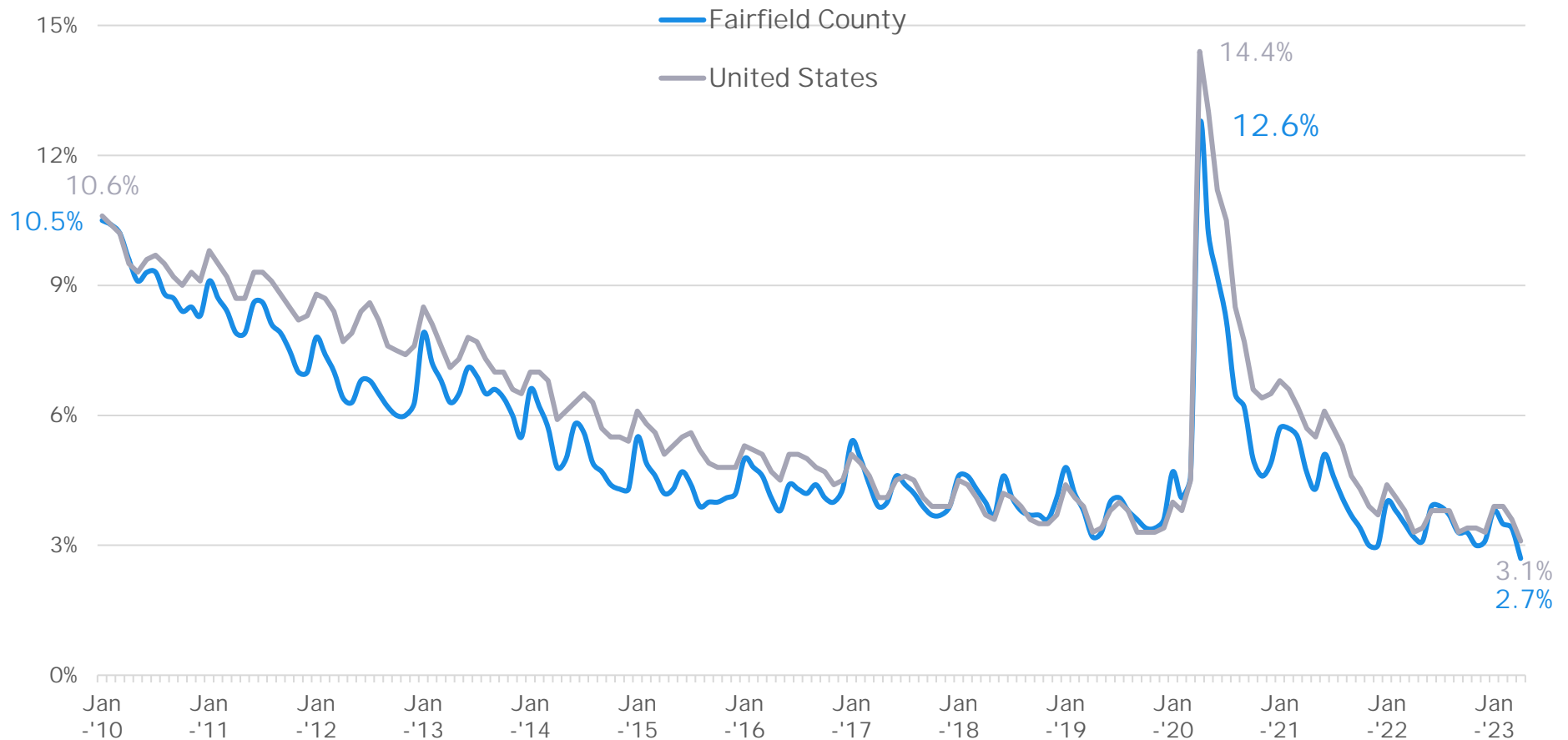Area 20 strategic workforce analysis and economy recovery plan: Fairfield County economic and background assessment

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Unemployment rate

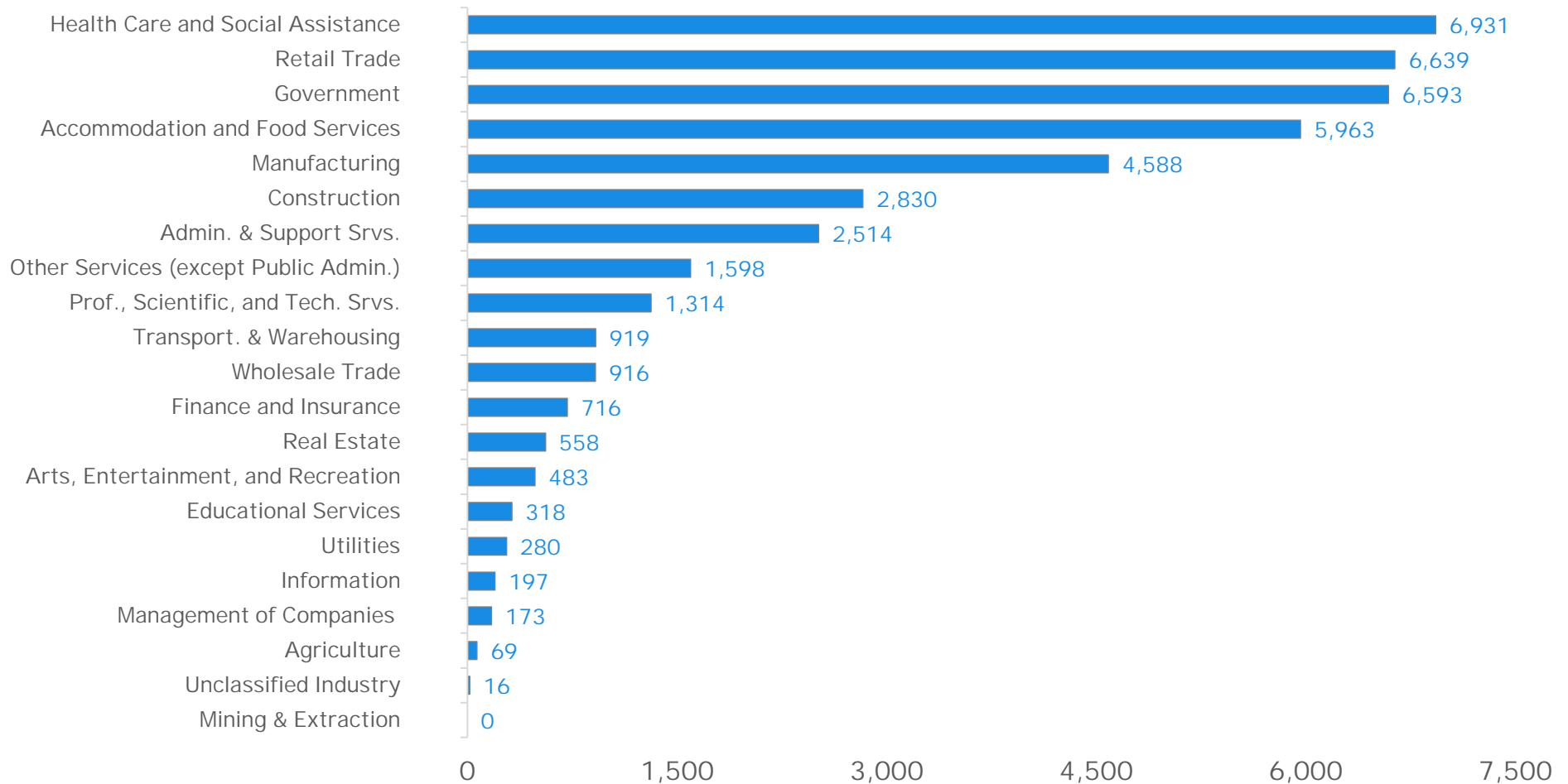Monthly unemployment rate (non-seasonally adjusted), January 2010 – April 2023
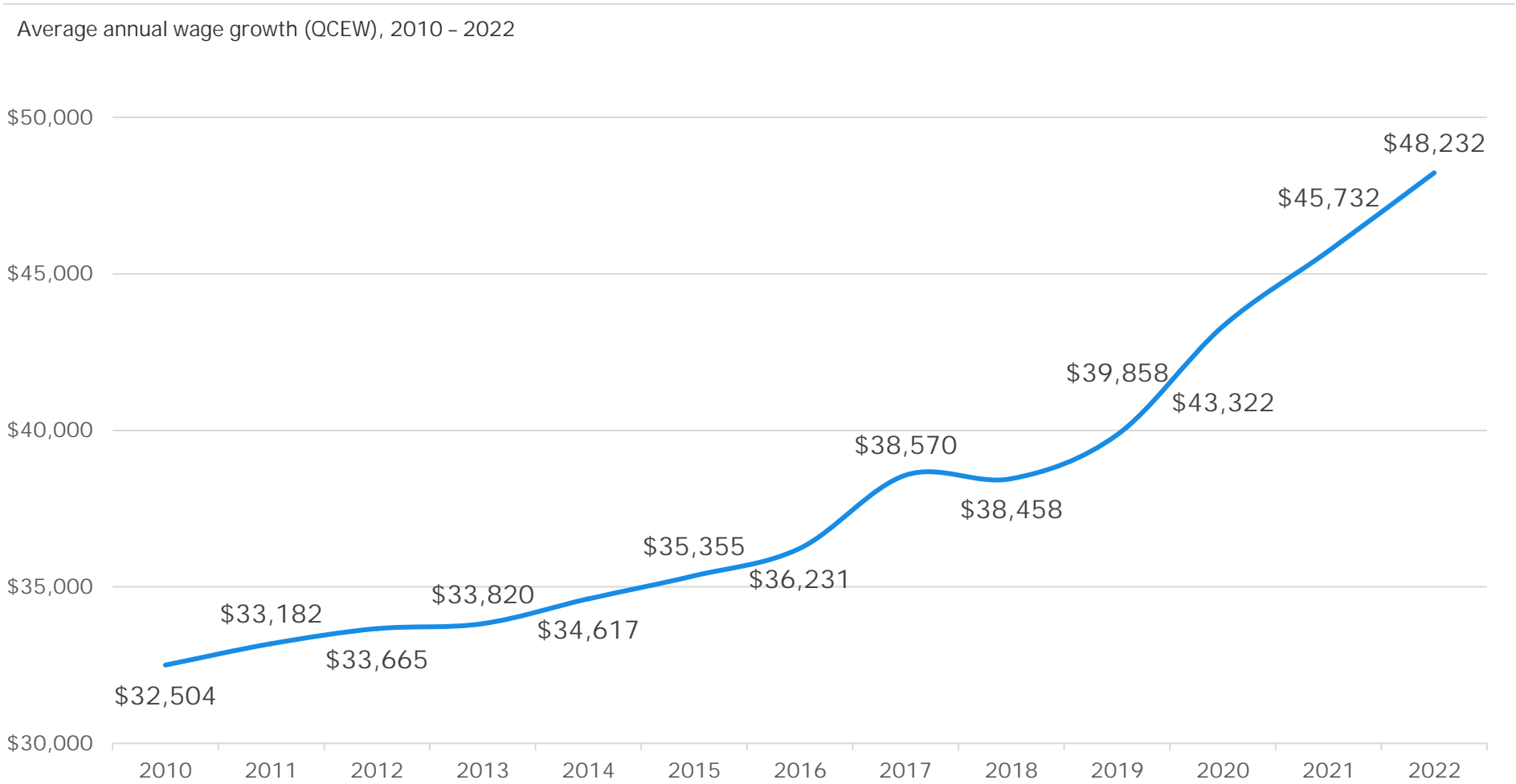

Source: US Bureau of Labor Statistics

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Employment by industry

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

Industry	Employment
Health Care and Social Assistance	6,931
Retail Trade	6,639
Government	6,593
Accommodation and Food Services	5,963
Manufacturing	4,588
Construction	2,830
Admin. & Support Srvs.	2,514
Other Services (except Public Admin.)	1,598
Prof., Scientific, and Tech. Srvs.	1,314
Transport. & Warehousing	919
Wholesale Trade	916
Finance and Insurance	716
Real Estate	558
Arts, Entertainment, and Recreation	483
Educational Services	318
Utilities	280
Information	197
Management of Companies	173
Agriculture	69
Unclassified Industry	16
Mining & Extraction	0

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Average wage growth

Average annual wage growth (QCEW), 2010 – 2022

$50,000

$45,000

$40,000

$35,000

$30,000

| 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |

$32,504
$33,182
$33,665
$33,820
$34,617
$35,355
$36,231
$38,570
$38,458
$39,858
$43,322
$45,732
$48,232

Source: Lightcast

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Wage by industry

Industry	Wage
Utilities	$106,952
Management of Companies	$86,881
Wholesale Trade	$78,937
Finance and Insurance	$72,542
Prof., Scientific, and Tech. Srvs.	$62,598
Construction	$62,414
Real Estate	$60,434
Manufacturing	$58,972
Health Care and Social Assistance	$58,796
Government	$58,024
Transport. & Warehousing	$52,216
Information	$49,159
Admin. & Support Srvs.	$48,464
Other Services (except Public Admin.)	$41,951
Unclassified Industry	$39,908
Retail Trade	$31,480
Agriculture	$31,073
Educational Services	$27,384
Accommodation and Food Services	$19,735
Arts, Entertainment, and Recreation	$19,233

Total, All Industries
$48,232

Source: Lightcast

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Educational attainment

Educational attainment, 2021

Source: US Census Bureau

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Educational attainment by age

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

	< HS	HS	Some College, No Degree	Associate	Bachelor's+
18 to 24	17.7% US = 12.0%	43.2% US = 32.9%	27.6% US = 37.5%	4.1% US = 5.6%	7.5% US = 12.1%
25 to 34	5.4% US = 8.1%	27.0% US = 24.1%	26.1% US = 21.4	10.3% US = 9.0%	31.2% US = 37.4%
35 to 44	4.1% US = 10.7%	25.6% US = 22.7%	21.0% US = 19.0%	10.5% US = 9.4%	38.9% US = 38.2%
45 to 64	5.4% US = 11.3%	32.4% US = 27.2%	21.5% US = 19.9%	9.7% US = 9.3%	30.9% US = 32.2%
65 and older	11.0% US = 13.8%	42.6% US = 30.4	20.7% US = 19.7%	4.7% US = 6.9%	20.9% US = 29.2%

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Source: US Census Bureau

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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 Srvc.	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

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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

Strong & Advancing	Weak but Advancing	Strong but Declining	Weak & Declining

EY

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

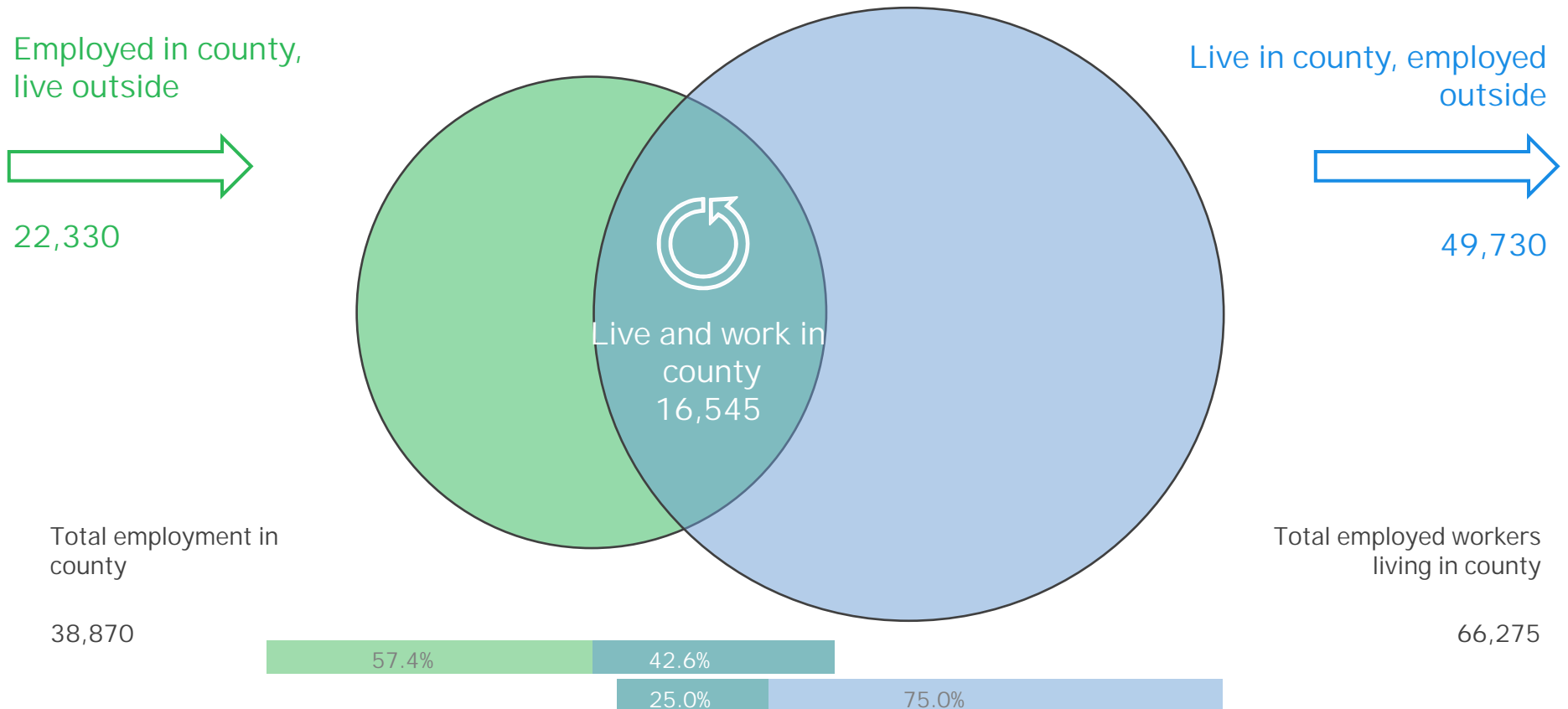*Source: Lightcast*

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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

Employed in county, live outside

22,330

Live in county, employed outside

49,730

Live and work in county
16,545

Total employment in county

38,870

57.4%   42.6%

25.0%   75.0%

Total employed workers living in county

66,275

Source: US Census Bureau

Area 20 strategic workforce analysis and economy recovery plan: Fairfield County economic and background assessment

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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

EY
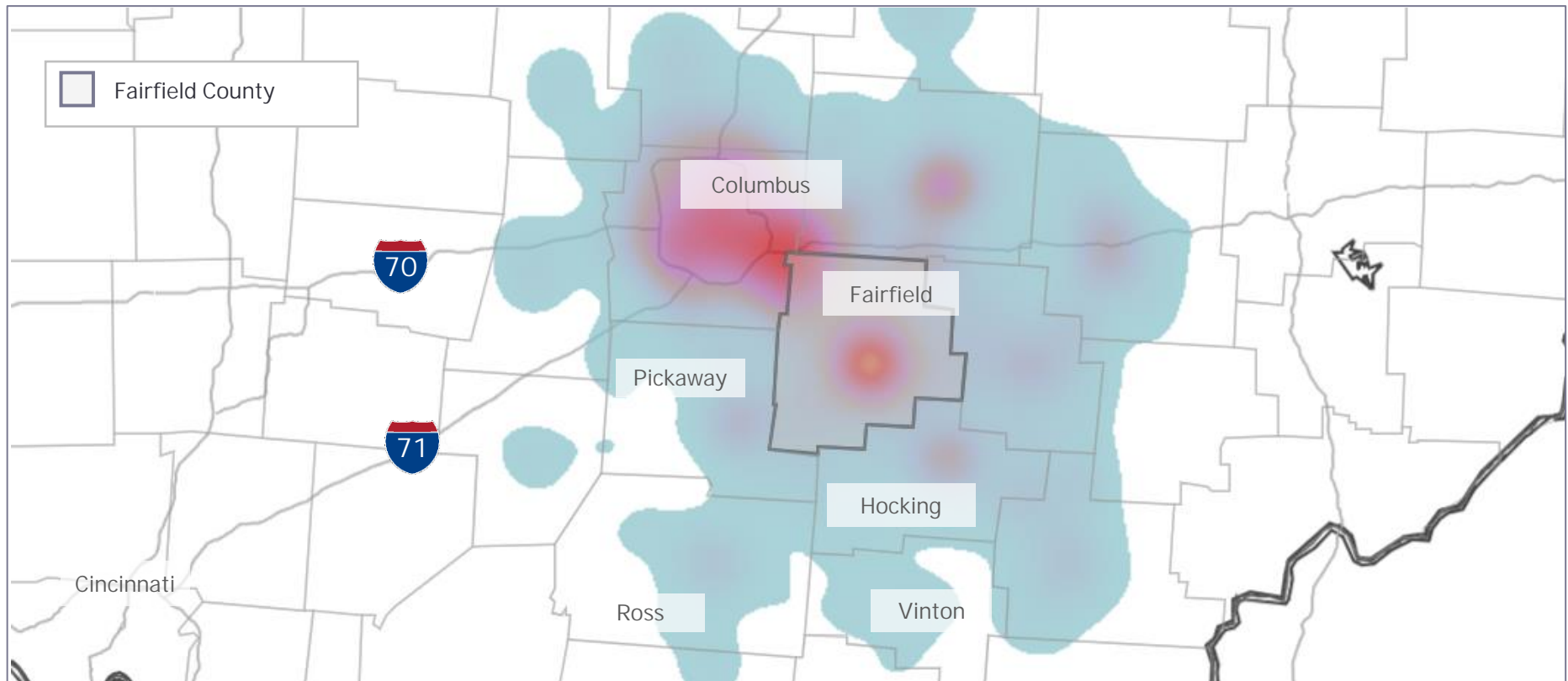
Fairfield County's resident worker destinations

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

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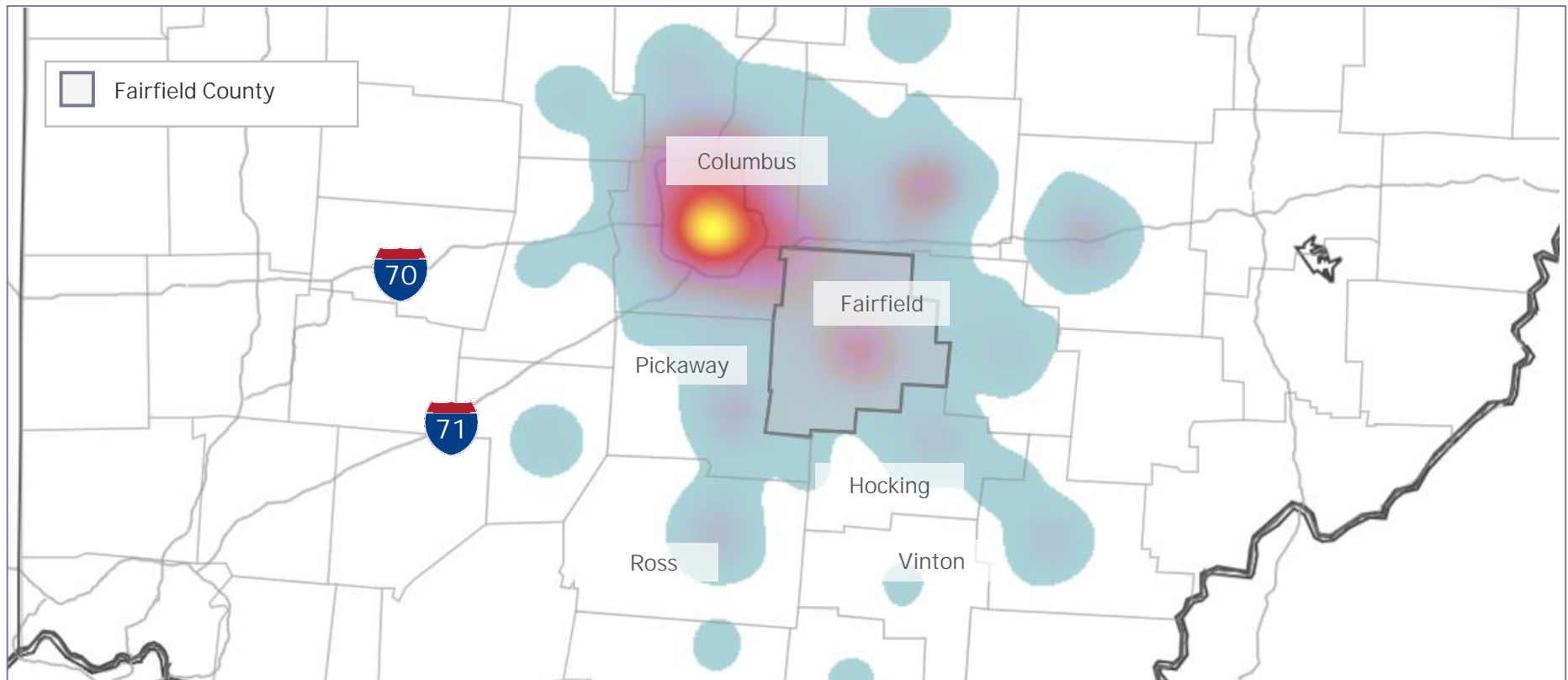
Inflow/outflow of workers by age and earnings

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 that those workers earning less than $40,000 annually.

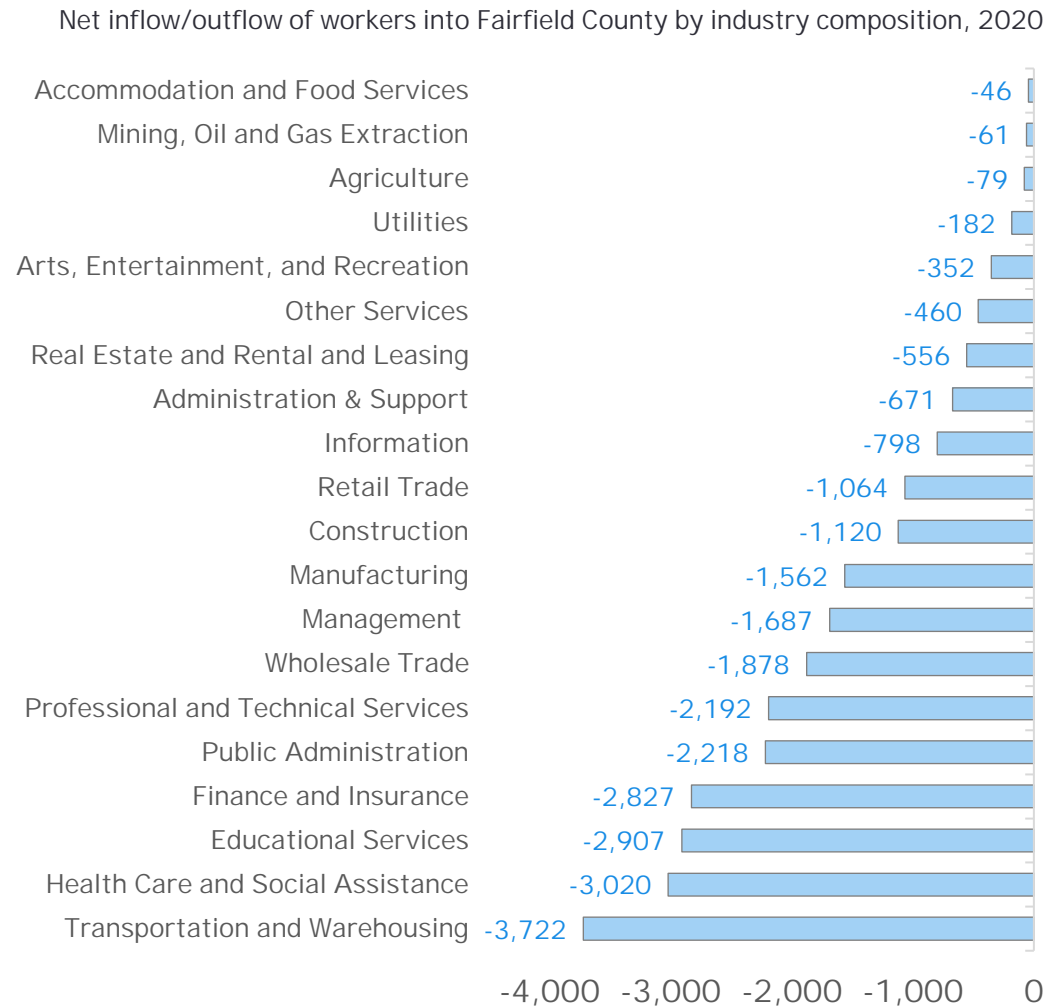Net inflow/outflow of workers into Fairfield County by age, 2020

- -4,009 — Age 29 or younger
- -17,055 — Age 30 to 54
- -6,338 — Age 55 and older

(axis: -18,000, -15,000, -12,000, -9,000, -6,000, -3,000, 0)
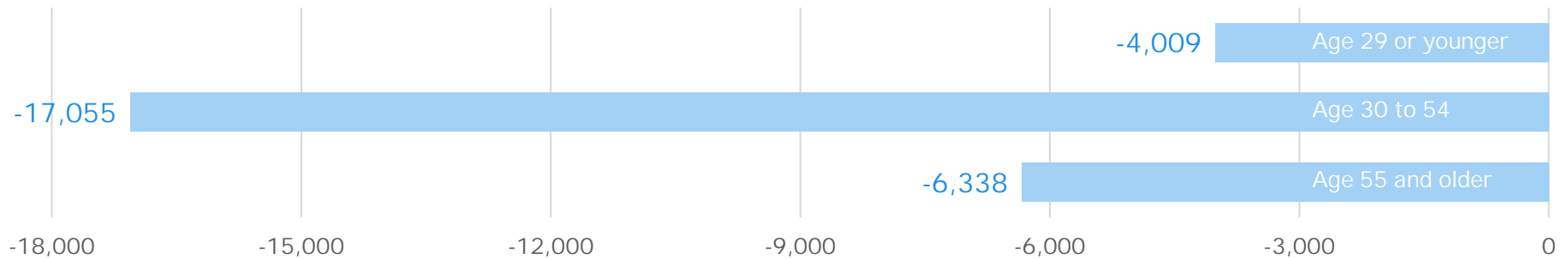
Net inflow/outflow of workers into Fairfield County by earnings, 2020

- -2,587 — $15,000 or less
- -5,558 — $15,000 to $40,000
- -19,257 — $40,000 or more

(axis: -20,000, -16,000, -12,000, -8,000, -4,000, 0)

Source: US Census Bureau

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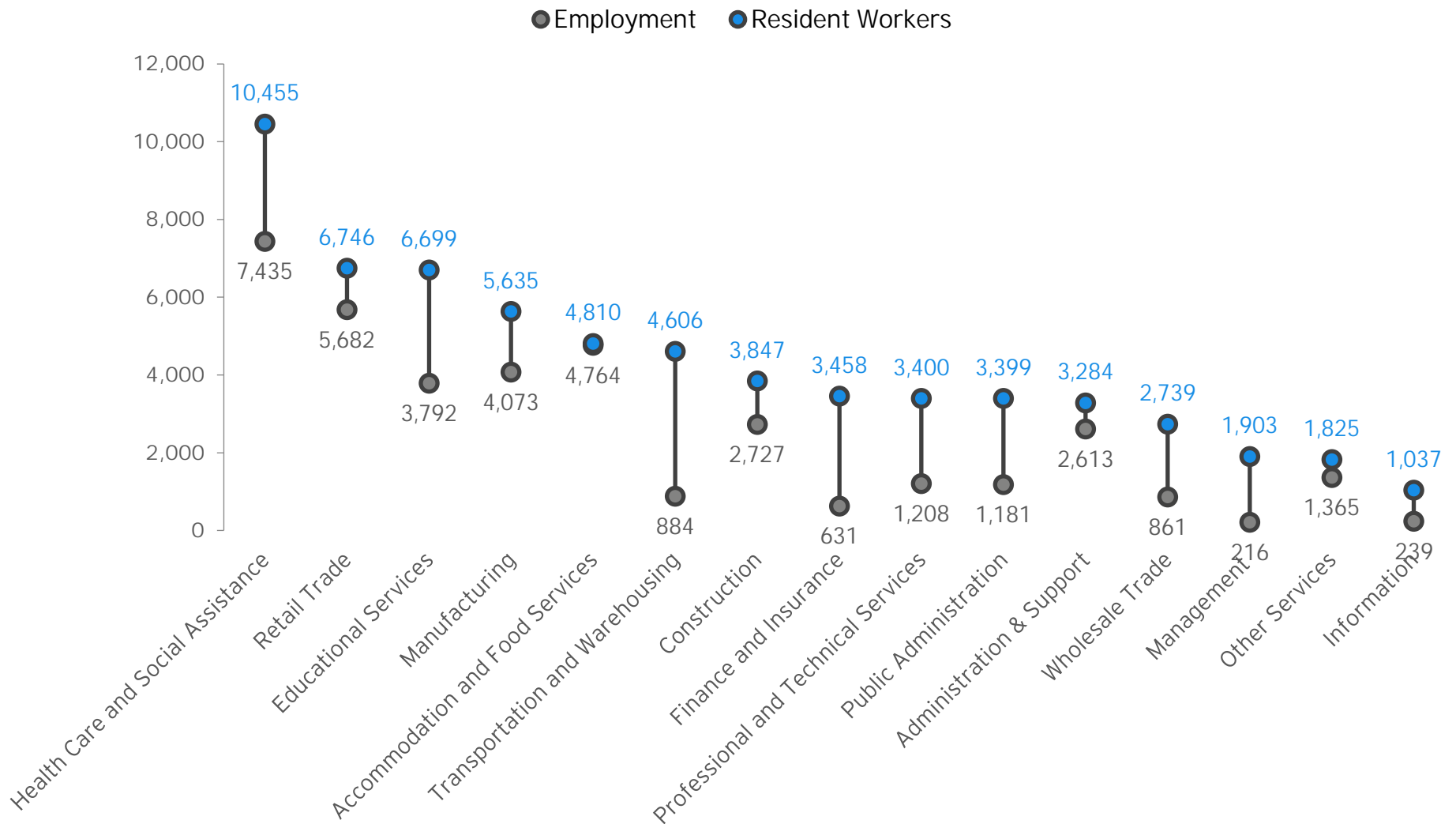
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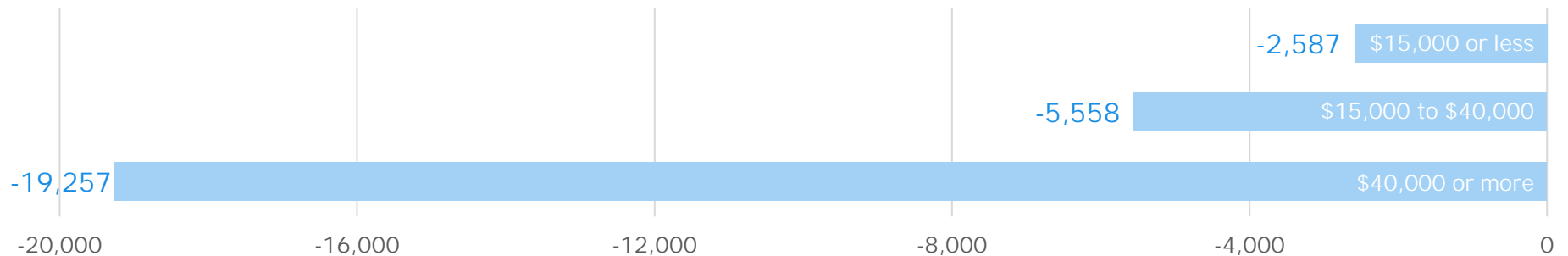
Net inflow of workers by industry

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.

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

Industry	Value
Accommodation and Food Services	-46
Mining, Oil and Gas Extraction	-61
Agriculture	-79
Utilities	-182
Arts, Entertainment, and Recreation	-352
Other Services	-460
Real Estate and Rental and Leasing	-556
Administration & Support	-671
Information	-798
Retail Trade	-1,064
Construction	-1,120
Manufacturing	-1,562
Management	-1,687
Wholesale Trade	-1,878
Professional and Technical Services	-2,192
Public Administration	-2,218
Finance and Insurance	-2,827
Educational Services	-2,907
Health Care and Social Assistance	-3,020
Transportation and Warehousing	-3,722

-4,000 -3,000 -2,000 -1,000 0

Source: US Census Bureau

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Industry composition by worker origin

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

● Employment   ● Resident Workers

Source: US Census Bureau

Area 20 strategic workforce analysis and economy recovery plan: Fairfield County economic and background assessment

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Occupation composition by worker origin

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

Source: Lightcast

Area 20 strategic workforce analysis and economy recovery plan: Fairfield County economic and background assessment

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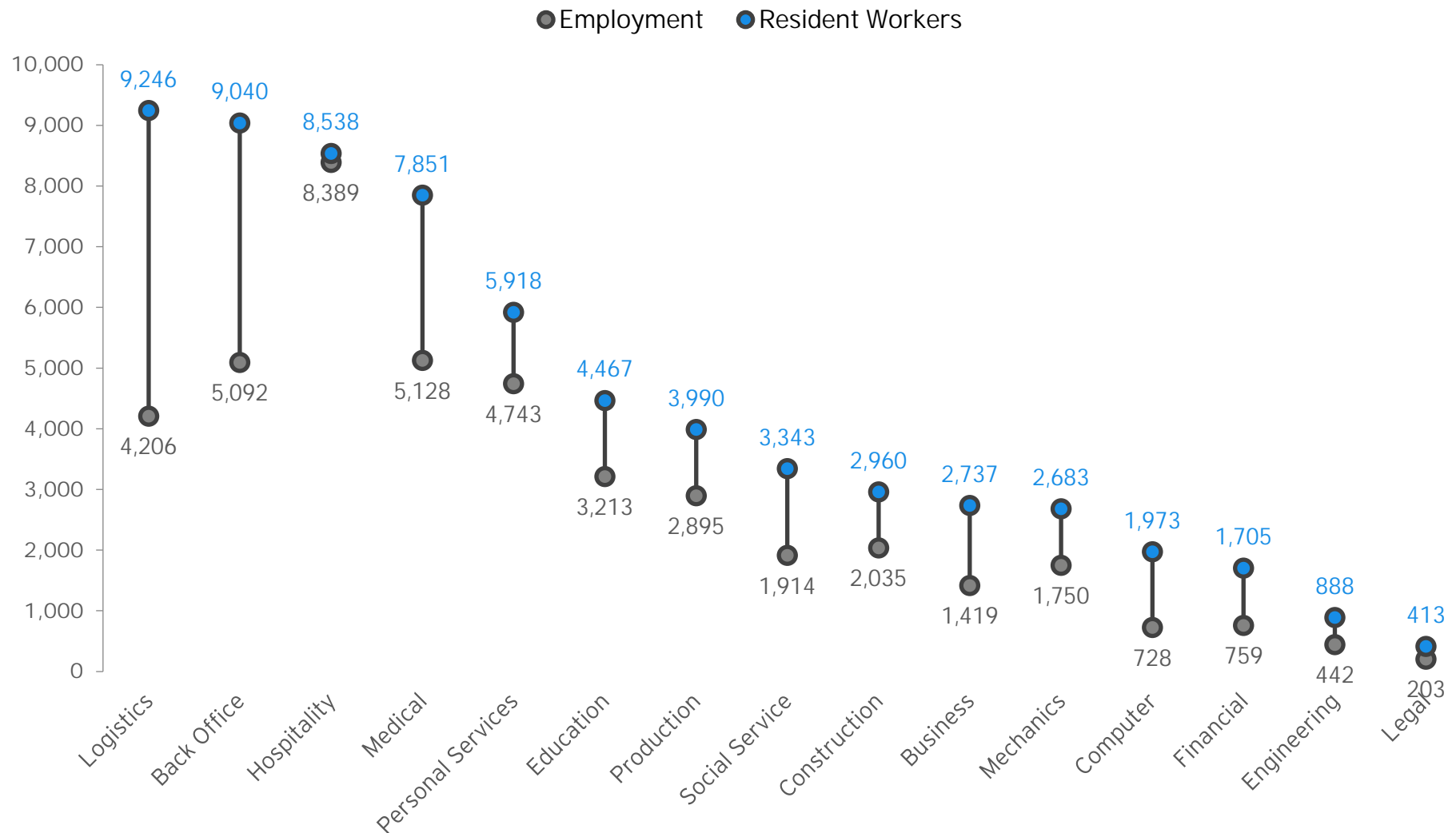
Forecasted growth in industry composition

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

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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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Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

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