Regional Overview

OSU Extension Area 18 is a three-county area in the south-central part of the state, including Fairfield, Hocking, and Licking counties. In 2020, the combined Area 18 footprint is 1,615 square miles (mi²) supporting a population of 368,086 residents and an overall population density of 228 residents per square mile. Population density is a ratio of total population to total land area, simply described as a count of residents per square mile. As illustrated in Image 1, Fairfield County has the highest population density of 318, followed by Licking County with a population density of 261, while Hocking had a population density 67 residents per square mile.

Overall, the combined population in Area 18 has grown, increasing by 21.3% from 303,554 in 2001 to a total population of 368,086 in 2020. However, there were some notable shifts in the population trends of individual counties between 2001 and 2020. Fairfield County experienced the greatest amount of growth as the population increased by 26% from 127,395 in 2001 to 160,662 in 2020. During this period, Licking County underwent a population increase of 21.3% to a total of 179,162 in 2020. Between 2001 and 2020 there was a minor shift in population (-0.6%) in Hocking County with a total of 28,263 residents in 2020.

Key Stats

- Population 368,086
- Total of 322 Industries
- Total Employment of 166,128
- Gross Domestic Product $13.03B

Data retrieved from IMPLAN (2020 data)
**Regional Industry Sector Overview**

IMPLAN defines the total annual production value of each Industry or Commodity as Output. Total output represents the total production value of an industry including intermediate inputs, employee compensation, proprietor income, taxes on production and imports, and other property income.

Table 1 below ranks the top 10 industries in Area 18 by total output in 2020. Owner-occupied dwellings was the highest ranked industry with a total output of $1.57 billion. The owner-occupied dwellings sector represents the wealth generated from home ownership. Owning and maintaining a home is also a major area of spending and the owner-occupied dwellings sector captures that economic effect. However, there is no employment or labor income generated in the owner-occupied dwellings sector, as the employment positions such as property managers and real estate agents is captured in the other real estate sector.

The industry with the second highest total output in Area 18 was warehousing and storage with a total output of $1.09 billion, supporting 13,388 jobs, and an average employee compensation of $38,759 per year. When comparing 2020 to 2019, the data shows the warehousing and storage industry experienced a 72% increase in total output and a 79% increase in total employment.

The industry with the third highest total output was other real estate with a total output of $917 million, supporting 5,606 jobs, and an average employee compensation of $58,226.

Of the top 10 industries by total output, the sectors with the most employees in the region were warehousing and storage, employment and payroll of local government and education, and other real estate.

<table>
<thead>
<tr>
<th>Industry Description</th>
<th>Output</th>
<th>Total Employment</th>
<th>Average Employee Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner-occupied dwellings</td>
<td>$1,568,786,238</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Warehousing and storage</td>
<td>$1,093,636,667</td>
<td>13,388</td>
<td>$38,759</td>
</tr>
<tr>
<td>Other real estate</td>
<td>$917,735,492</td>
<td>5,606</td>
<td>$58,226</td>
</tr>
<tr>
<td>Monetary authorities and depository credit intermediation</td>
<td>$818,917,521</td>
<td>1,611</td>
<td>$73,414</td>
</tr>
<tr>
<td>Employment and payroll of local govt, education</td>
<td>$706,025,655</td>
<td>8,148</td>
<td>$75,467</td>
</tr>
<tr>
<td>Soap and other detergent manufacturing</td>
<td>$661,543,992</td>
<td>513</td>
<td>$87,187</td>
</tr>
<tr>
<td>Insurance carriers, except direct life</td>
<td>$605,586,412</td>
<td>1,255</td>
<td>$95,275</td>
</tr>
<tr>
<td>Electric power transmission and distribution</td>
<td>$526,491,518</td>
<td>405</td>
<td>$146,037</td>
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<tr>
<td>Toilet preparation manufacturing</td>
<td>$504,049,123</td>
<td>552</td>
<td>$58,711</td>
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<tr>
<td>Hospitals</td>
<td>$479,685,051</td>
<td>2,801</td>
<td>$71,444</td>
</tr>
</tbody>
</table>
Area 18 Annual Employment Trends

The Total Employment figure reported by IMPLAN represents a full and part-time annual average including the self-employed, all federal, state, and local government employment and military employment (including overseas military).

Chart 1 provides a visual reference of the Area 18 annual employment trends between 2001 and 2020. As shown in the chart, Area 18 experienced consistent growth between 2002 and 2007 when the U.S. housing market collapsed, stressing global financial markets, and ultimately triggering the U.S. economy into a period of recession. Since 2010 annual employment in Area 18 increased by 27.1% reaching a peak employment of 166,128 jobs in 2020. Between 2019 and 2020 Area 18 experienced a year-to-year job increase, gaining 3,698 jobs, leaving an annual employment.

When considering the long-term employment trends by county, Licking County saw the greatest growth in total employment of 28.9%, increasing from 72,791 in 2001 to 94,042 in 2020. Similarly, Fairfield County total employment increased by 28.6%, from 48,344 jobs in 2001 to 61,162 in 2020. During the same period (2001–2020) Hocking County experienced a small increase in total employment (5.4%).

“Year-to-year, Area 18 total employment is up 3,698 Jobs in 2020”

Fairfield County, Ohio Hocking County, Ohio Licking County, Ohio
A location quotient (LQ) is a metric that compares the relative concentration of a local region's workers in a specific industry sector to the concentration of workers nationally in the same sector. An LQ equal to 1 signifies that the local share is equal to the national share, while an LQ greater than 1 means the local share is greater than the national share and is typically an exporter or perhaps has a specialization in that sector. Where there is an occupational concentration, there also tends to be higher core competencies relative to other areas, creating a competitive advantage. In addition, training and education opportunities associated with the occupation are often readily available to meet hiring demands.

Illustrated above, Chart 2 lists the top 15 occupations with the highest LQ in Area 18 demonstrating a significant concentration of workers relative to the nation. In 2020, the top occupation by LQ in Area 18 was material moving workers, with an LQ of 2.21. This suggests the region has more than two times the number of material moving workers compared to the national average. The second highest occupation by LQ in Area 18 was grounds maintenance workers at 2.14, followed by supervisors of transportation and material moving workers with an LQ of 1.85, and religious workers at 1.82.
Image 2 illustrates the average employee compensation by county for 2020. Employee Compensation is the total payroll cost of an employee including wages and salaries, all benefits, and payroll taxes. The average employee compensation is calculated as Employee Compensation divided by wage and salary Employment.

Of the counties in Area 18, Licking County had the highest average employee compensation of $56,641, also ranking 51st highest in Ohio. The next highest average employee compensation in Area 18 was Fairfield County ($54,331), followed by Hocking County ($46,388).
IMPLAN® model, 2020 Data, using inputs provided by the user and IMPLAN Group LLC, IMPLAN System (data and software), 16905 Northcross Dr., Suite 120, Huntersville, NC 28078 www.IMPLAN.com

OSU Extension Community Development Mission:
We help communities enhance their well-being and create social, economic and environmental conditions in which they can thrive.

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