

Extension Area 14: Economic Overview

Carroll, Harrison, Jefferson, and Tuscarawas Counties

Report prepared January 2025 by Amanda Osborne and Eric Romich, OSU Extension Community Development

Spring 2025 Edition

Regional Overview

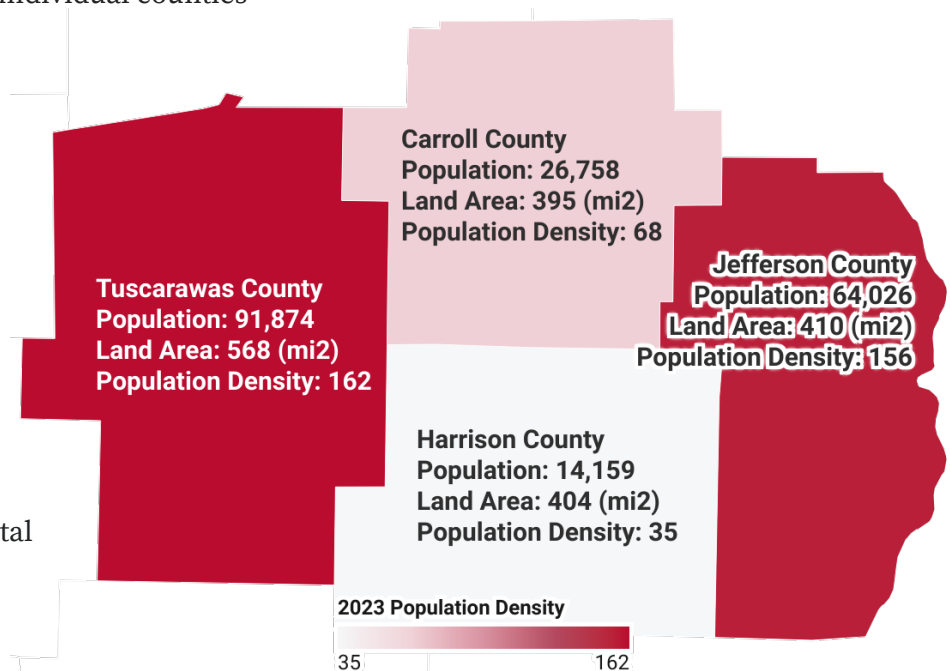
OSU Extension Area 14 is a four-county area in the eastern part of the state, including Carroll, Harrison, Jefferson, and Tuscarawas counties. In 2023, the combined Area 14 footprint is 1,776 square miles (mi²) supporting a population of 196,817 residents and an overall population density of 111 residents 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, Tuscarawas County has the highest population density of 162, followed by Jefferson County with a population density of 156, while Harrison, and Carroll counties ranged between 35 to 68 residents per square mile.

Overall, the combined population in Area 14 has remained consistent decreasing slightly by -5.8% from 208,893 in 2001 to a total population of 196,817 in 2023. However, there were some notable shifts in the population trends of individual counties between 2001 and 2023. Jefferson County experienced the greatest amount of decline as the population decreased by -12.1% from 72,855 in 2001 to 64,026 in 2023. During this period, Carroll County underwent a population decrease of -8% to a total of 26,758 in 2023, while Harrison County had a population decrease of -10.9% to a total of 14,159 in 2023. Between 2001 and 2023, Tuscarawas County was the only county to see a population increase (0.9%) to a total of 91,874 residents in 2023.

Key Stats

- Total of 312 Industries**
- Total Employment of 96,392**
- Gross Domestic Product \$11.1 B**

Image 1: OSU Extension Area 14 Population Density



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 14 by total output in 2023. Oil and gas extraction was the highest ranked industry with a total output of \$1.3 billion, supporting 844 jobs, and an average employee compensation of \$129,392. When comparing 2023 to 2022, the data shows the oil and gas extraction industry experienced a 16.3% increase in total output, a 168.9% increase in employment, and a -2.2% decrease in average employee compensation.

The industry with the second highest total output in Area 14 was iron and steel mills and ferroalloy manufacturing with a total output of \$1.2 billion. This industry supported 642 jobs with an average employee compensation of \$118,069. When

comparing 2023 to 2022, the data shows this industry saw a 19.2% increase in total output, a 17.2% increase in employment, and -3.2% decrease in average employee compensation.

The industry with the third highest total output was owner-occupied dwellings with a total output of \$943 million. 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.

Of the top 10 industries by total output, the sector with the most employees in the region was other real estate with 3,503 employees. The average annual income for these workers was \$52,415 per year.



Table 1: Area 14 Top 10 Industries by Total Output

Industry Description	Output	Total Employment	Average Employee Compensation
Oil and gas extraction	\$1,252 M	844	\$129,392
Iron and steel mills and ferroalloy manufacturing	\$1,240 M	642	\$118,069
Owner-occupied housing	\$943 M	N/A	N/A
Other basic organic chemical manufacturing	\$902 M	423	\$137,995
Electric power generation - Fossil fuel	\$752 M	376	\$196,889
Petroleum refineries	\$635 M	57	\$170,796
Hospitals	\$531 M	2,737	\$84,990
Other real estate	\$514 M	3,503	\$52,415
Monetary authorities & depository credit intermediation	\$483 M	841	\$72,718
Construction machinery manufacturing	\$474 M	669	\$86,240

Area 14 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 2 provides a visual reference of the Area 14 annual employment trends between 2001 and 2023. As shown in the chart, Area 14 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 2001 annual employment in Area 14 has increased 3.1% reaching a peak employment of 96,392 jobs in 2023. However, between 2019 and 2020 Area 14 experienced the greatest year to year job loss in the last decade, losing 3,722 jobs, leaving an annual employment of 89,149 in 2020. Since 2020, 7,243 jobs were gained. As noted in Chart 1, in 2023 65%

of the workforce was local, while 35% were out-commuters.

When considering the long-term employment trends by county, Jefferson County saw the greatest decline in total employment of -10.8%, decreasing from 31,542 in 2001 to 28,126 in 2023. Similarly, Harrison County total employment decreased by -6.1%, from 6,213 jobs in 2001 to 5,831 in 2023. During the same period (2001–2023) two of the counties in Area 14 experienced increases total employment including Carroll County (3.8%) and Tuscarawas County (13.7%).

Chart 1: Area 14 Location of Workforce

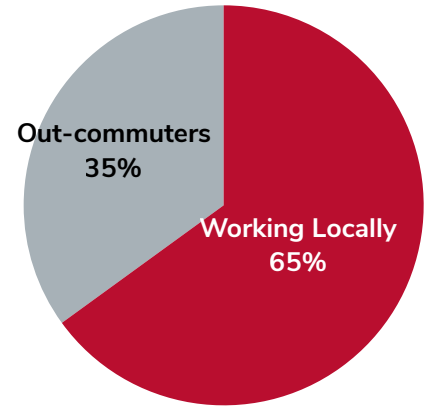


Chart 2: Area 14 Annual Employment

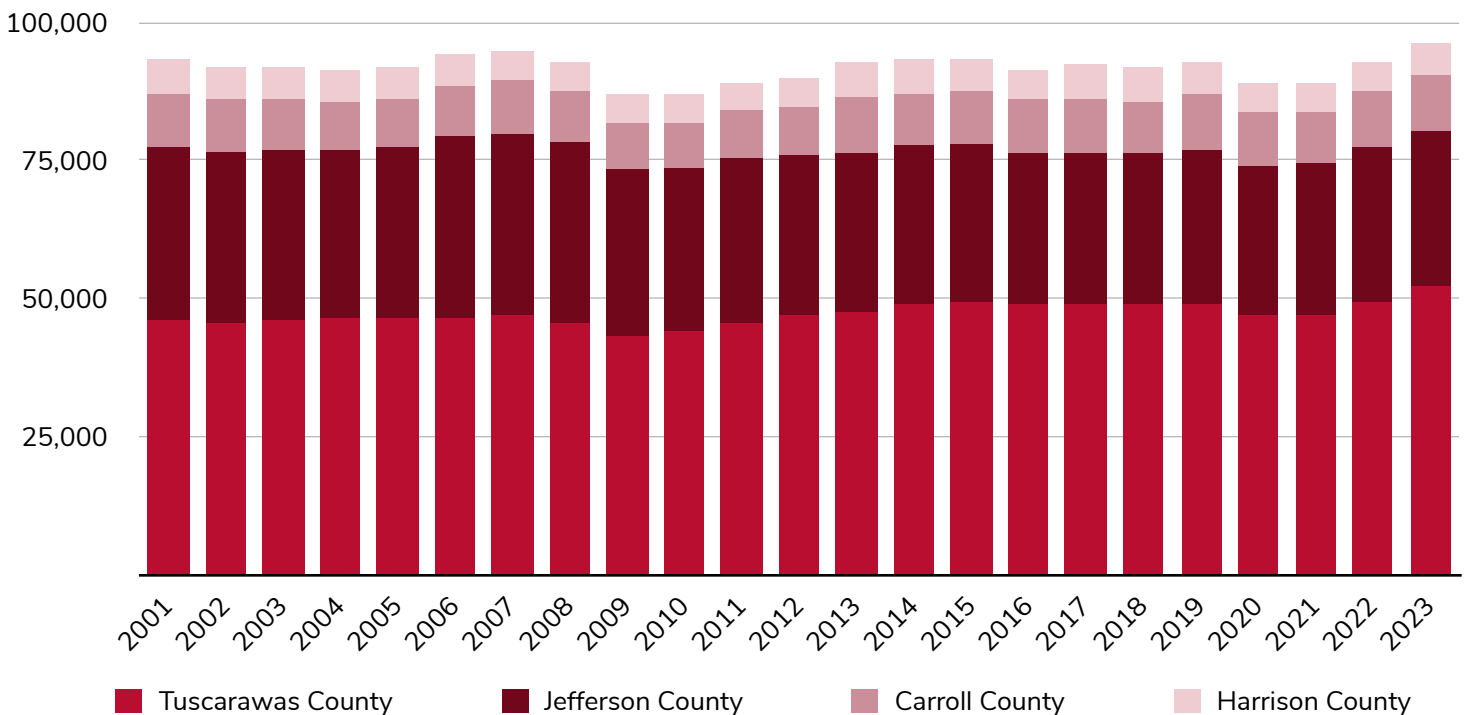
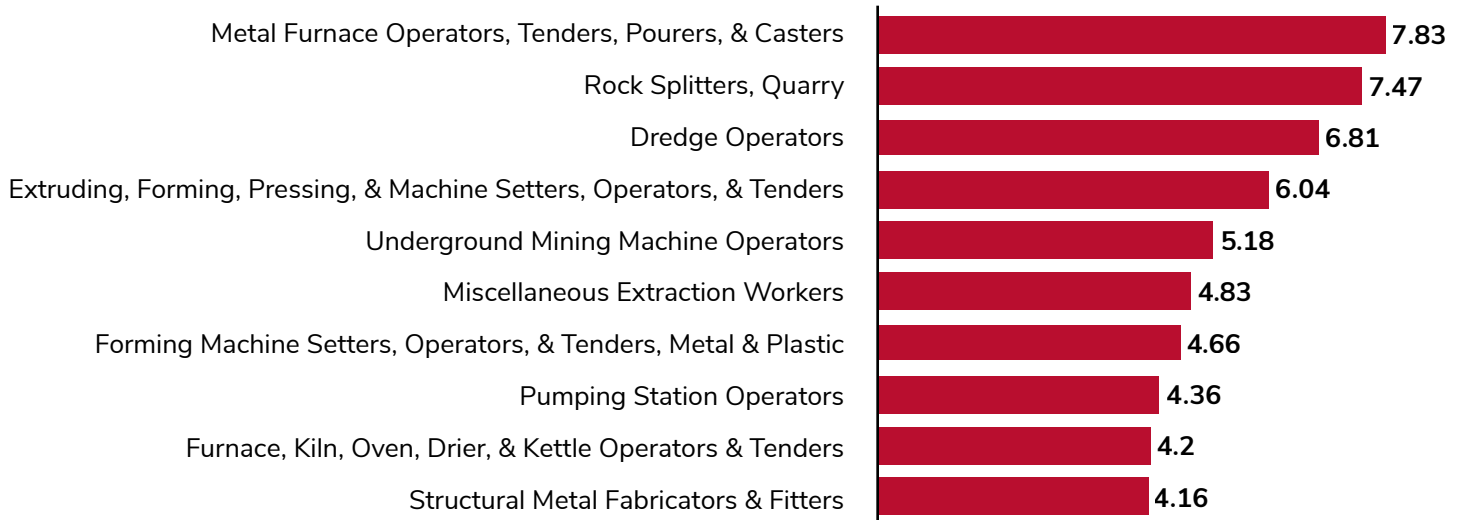


Chart 3: Area 14 Top 10 Occupations by Location Quotient

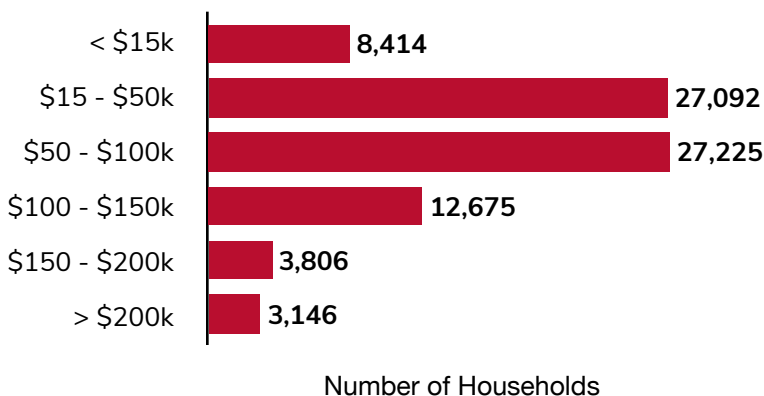


Occupations by Location Quotient

A location quotient (LQ) is a metric that compares the relative concentration of a local regions 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 10 occupations with the highest LQ in Area 14 demonstrating a significant concentration of workers relative to the nation. In 2023, the top occupation by LQ in Area 14 was metal furnace operators, tenders, pourers, and casters, with an LQ of 7.83. This suggests the region has more than almost eight times the number of metal furnace operators, tenders, pourers, and casters compared to the national average. The second highest occupation by LQ in Area 14 was quarry rock splitters at 7.47, followed by dredge operators with an LQ of 6.81, and extruding, forming, pressing, and compacting machine setters, operators, and tenders at 6.04.

Chart 4: Area 14 Households Income



Household Income

Area 14, had 82,358 households in 2023. Illustrated in Chart 4, the majority of the 82,358 households had a household income of \$15k-\$50k (33%) or \$50k-\$100k (33%). In 2023, there were 3,146 households (4%) with an income of over \$200k and 8,414 households (10%) with an income of less than \$15k per year.

Image 2: Average Employee Compensation by County 2023 Data and Dollar Year

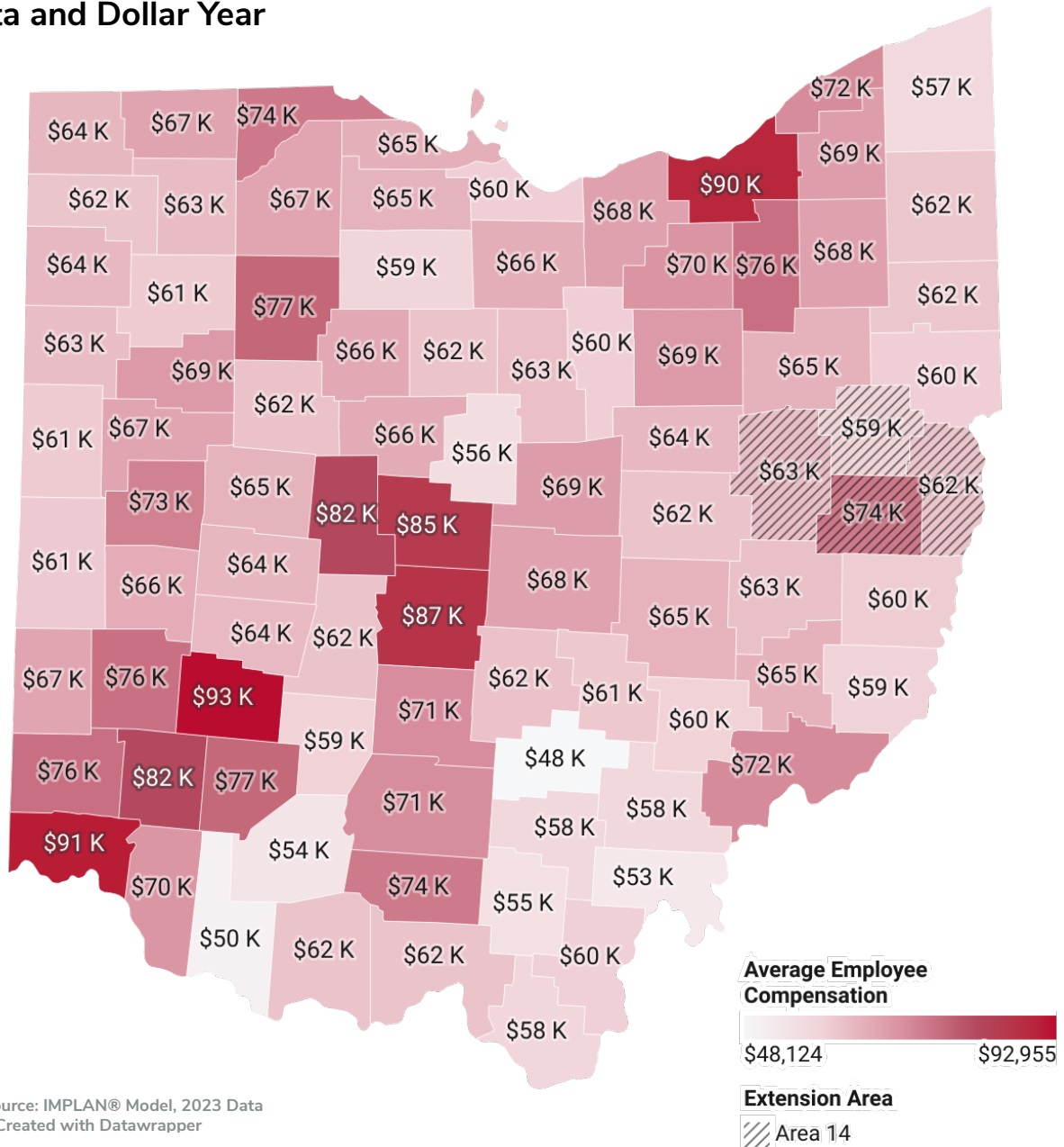


Image 2 illustrates the average employee compensation by county for 2022. Employee Compensation is the total payroll cost of an employee including wages and salaries, all benefits, and payroll taxes. The average employee compensation is calculated as Employee Compensation divided by wage and salary Employment. When comparing counties statewide, Hamilton County had the highest average employee compensation of \$89,038, while Brown County posted the lowest county average of

\$47,905 in 2022. When combining all Ohio counties, the statewide average employee compensation in 2022 was \$63,517 pe worker, which was a 5% increase compared to 2021. Of the counties in Area 14, Harrison County had the highest average employee compensation of \$68,585, ranking 17th highest in Ohio. The next highest average employee compensation in Area 14 was Tuscarawas County at \$59,613, followed by Jefferson County \$59,443, and Carroll County \$56,525.



Modeling Data Source

IMPLAN® model, 2023 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.

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