

# Extension Area 18: Economic Overview

## Fairfield, Hocking and Licking Counties

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

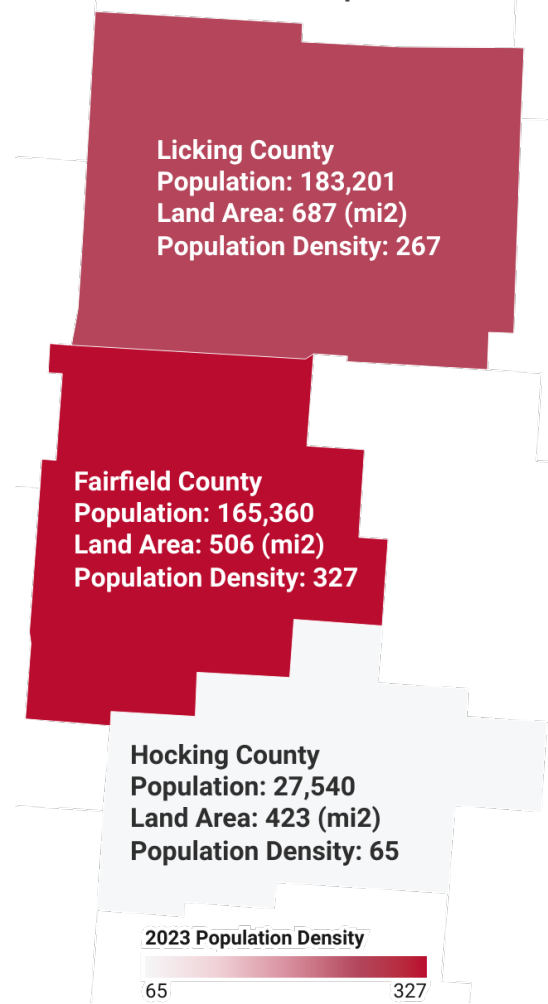
Spring 2025 Edition

### 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 2023, the combined Area 18 footprint is 1,615 square miles (mi<sup>2</sup>) supporting a population of 376,101 residents and an overall population density of 233 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 327, followed by Licking County with a population density of 267, while Hocking had a population density of 65 residents per square mile.

Overall, the combined population in Area 18 has grown, increasing by 23.9% from 303,554 in 2001 to a total population of 376,101 in 2023. However, there were some notable shifts in the population trends of individual counties between 2001 and 2023. Fairfield County experienced the greatest amount of growth as the population increased by 29.8% from 127,395 in 2001 to 165,360 in 2023. During this period, Licking County underwent a population increase of 24% to a total of 183,201 in 2023. Between 2001 and 2023 there was a slight population decrease (-3.2%) in Hocking County with a total of 27,540 residents in 2023.

Image 1: OSU Extension Area 18 Population Density



### Key Stats

**Total of 319 Industries**  
**Total Employment of 181,222**  
**Gross Domestic Product \$18.05 B**

# 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 2023. Owner-occupied dwellings was the highest ranked industry with a total output of \$1.94 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 are captured in the other real estate sector.

The industry with the second highest total output in Area 18 was monetary authorities and depository credit intermediation with a total output of \$1.38 billion, supporting 2,054 jobs, and an average employee compensation of \$89,321 per year. When comparing 2023 to 2022, the data shows the monetary authorities and depository credit intermediation industry experienced a 4.4% increase in total output and a 10.2% increase in total employment.

The industry with the third highest total output was other real estate with a total output of \$1.02 billion, supporting 6,932 jobs, and an average employee compensation of \$65,719.

Of the top 10 industries by total output, the sector with the most employees in the region was employment and payroll of local government and education with 8,749 employees.



**Table 1: Area 18 Top 10 Industries by Total Output**

Industry Description	Output	Total Employment	Average Employee Compensation
Owner-occupied housing	\$1,944 M	N/A	N/A
Monetary authorities and depository credit intermediation	\$1,380 M	2,054	\$89,321
Other real estate	\$1,028 M	6,932	\$65,719
Soap and other detergent manufacturing	\$902 M	722	\$92,438
Employment and payroll of local govt, education	\$778 M	8,749	\$75,397
Electric power transmission and distribution	\$729 M	462	\$149,167
Limited-service restaurants	\$691 M	6,877	\$23,009
Scientific research and development services	\$671 M	2,820	\$106,200
Toilet preparation manufacturing	\$632 M	750	\$63,849
Offices of physicians	\$559 M	3,386	\$142,237

# 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 2 provides a visual reference of the Area 18 annual employment trends between 2001 and 2023. 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 2001 annual employment in Area 18 increased by 38.6% reaching a peak employment of 181,222 jobs in 2023. Between 2022 and 2023 Area 18 experienced the most significant year-to-year job increase in the last two decades, gaining 7,242 jobs. As noted in Chart 1, in 2023 45% of the workforce was local, while 55% were out-commuters.

When considering the long-term employment trends by county, Fairfield County saw the greatest growth in total employment at 46.5%, increasing from 48,344 in 2001 to 70,835 in 2023. Similarly, Licking County's total employment increased by 36.5%, from 72,971 jobs in 2001 to 99,606 in 2023. During the same period (2001–2023) Hocking County experienced a more moderate increase in total employment (14.5%).

Chart 1: Area 18 Location of Workforce

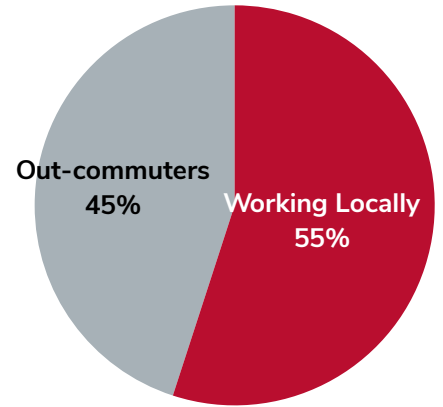
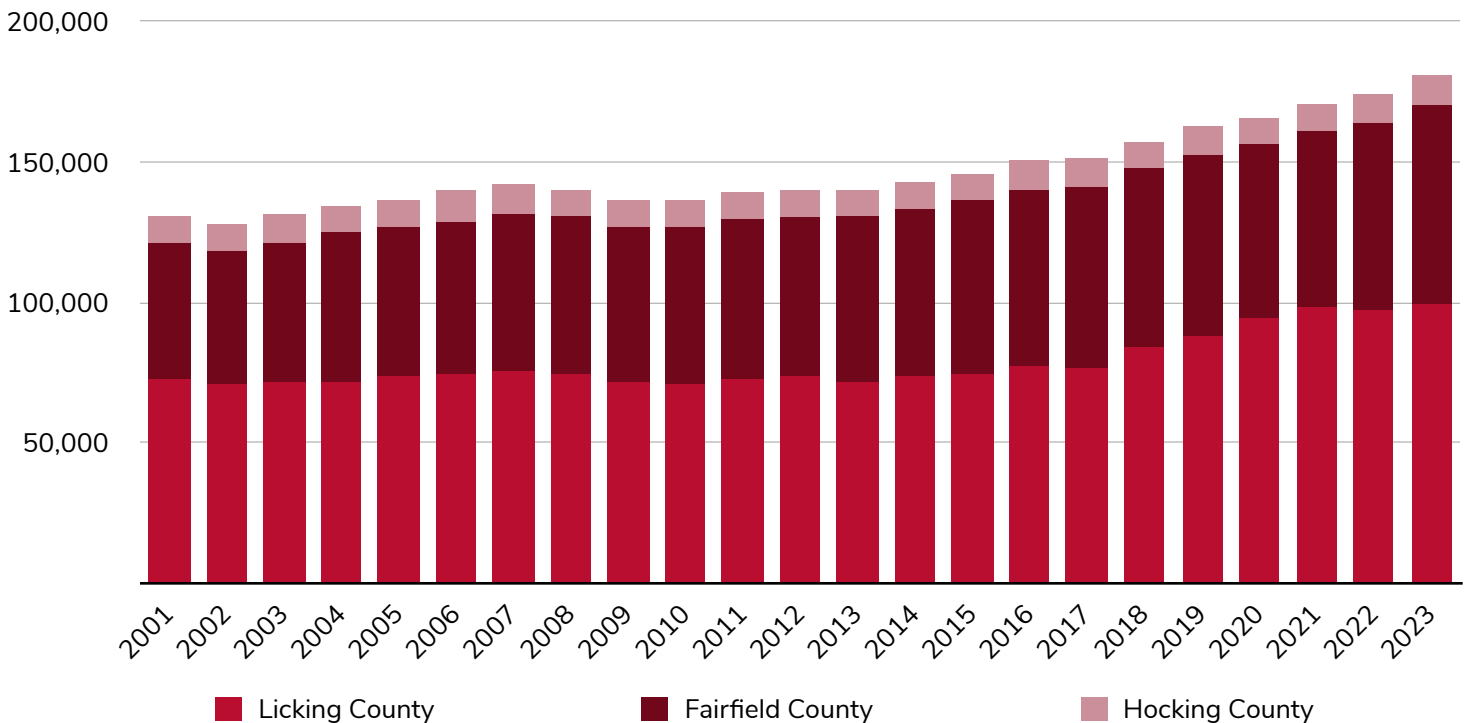
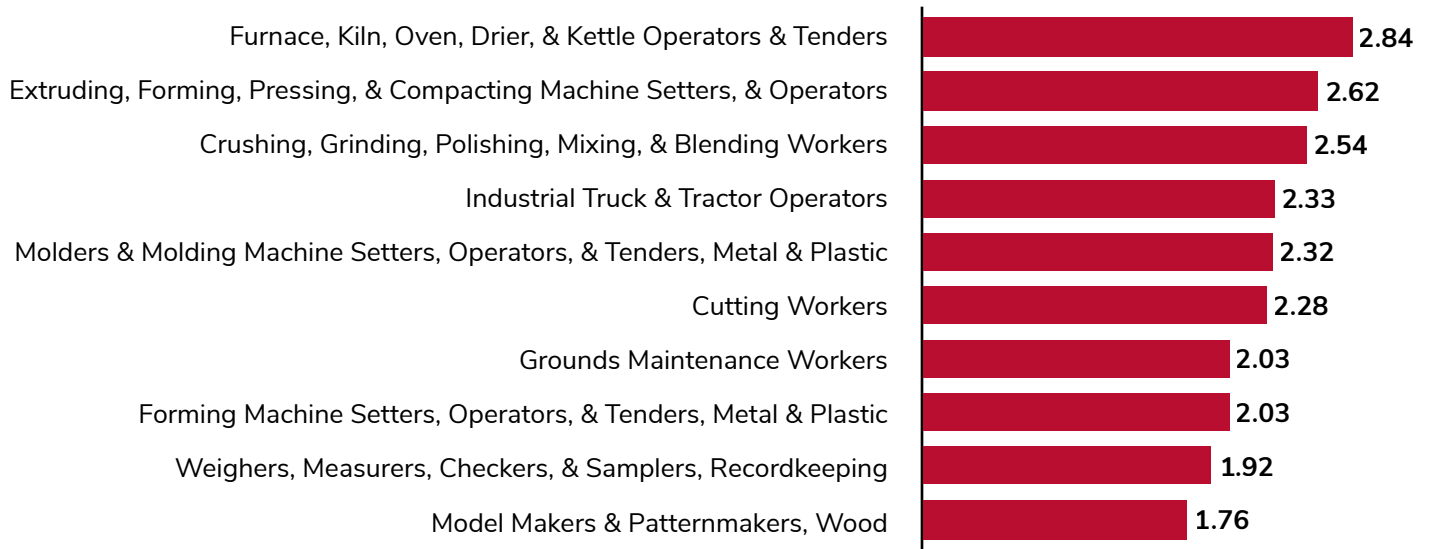


Chart 2: Area 18 Annual Employment



**Chart 3: Area 18 Top 10 Occupations by Location Quotient**

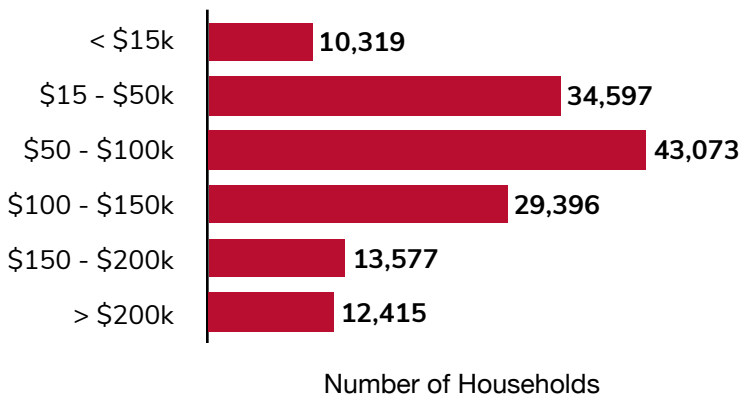


## Occupations by Location Quotient

A location quotient (LQ) is a metric that compares the relative concentration of a local 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 10 occupations with the highest LQ in Area 18 demonstrating a significant concentration of workers relative to the nation. In 2023, the top occupation by LQ in Area 18 was furnace, kiln, oven, drier, & kettle operators & tenders, with an LQ of 2.84. This suggests the region has nearly three times the number of furnace, kiln, oven, drier, & kettle operators & tenders compared to the national average. The second highest occupation by LQ in Area 18 was extruding, forming, pressing, & compacting machine setters, operators, & tenders at 2.62, followed by crushing, grinding, polishing, mixing, & blending workers with an LQ of 2.54, and industrial truck & tractor operators at 2.33.

**Chart 4: Area 18 Households Income**



## Household Income

Area 18, had 143,376 households in 2023. Illustrated in Chart 4, the majority of the 143,376 households had a household income of \$15k-\$50k (24%) or \$50k-\$100k (30%). In 2023, there were 12,415 households (9%) with an income of over \$200k and 10,319 households (7%) with an income of less than \$15k per year.

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

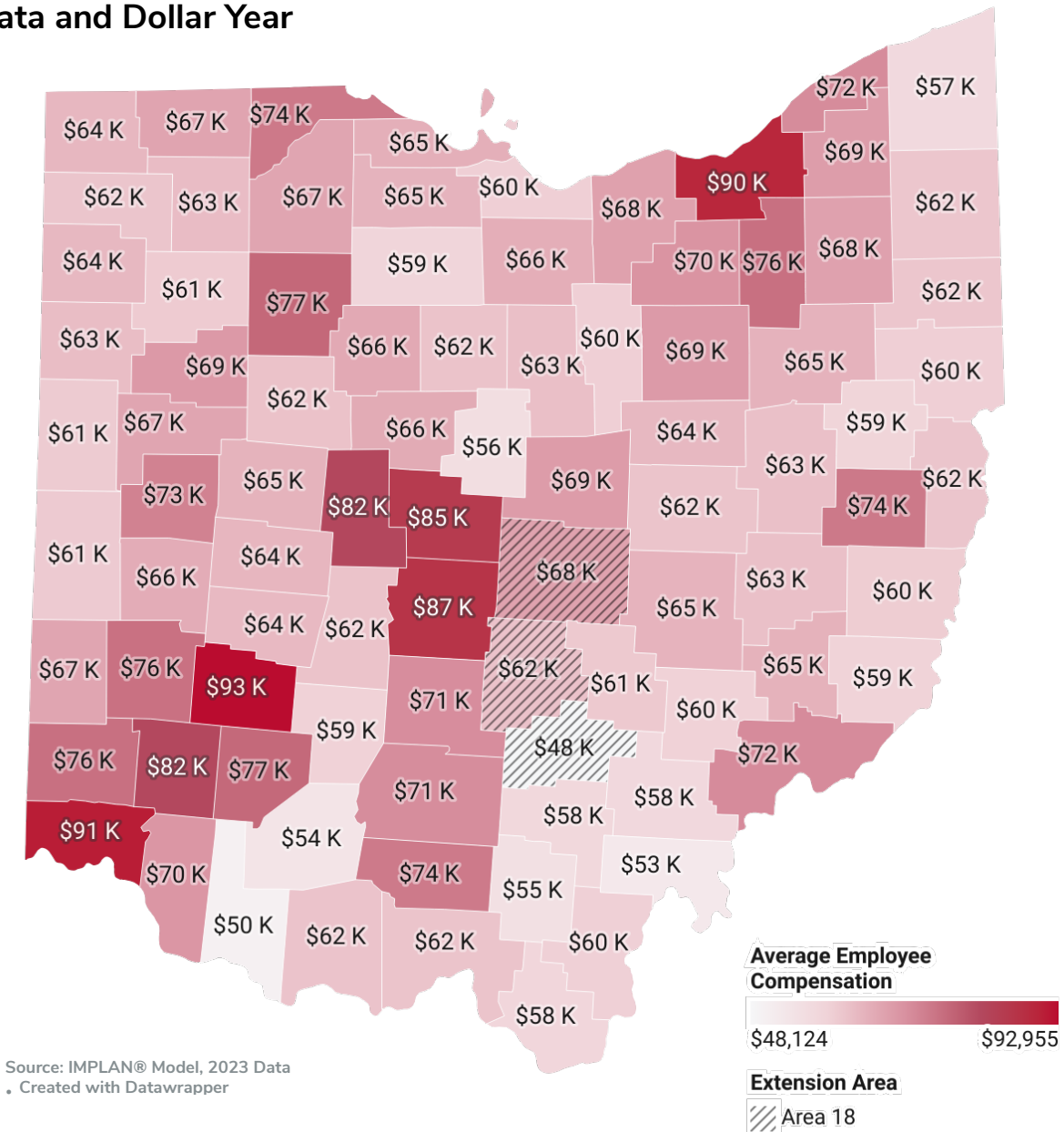


Image 2 illustrates the average employee compensation by county for 2023. Employee Compensation is the total payroll cost of an employee including wages and salaries, all benefits, and payroll taxes. The average employee compensation is calculated as Employee Compensation divided by wage and salary employment. When comparing counties statewide, Greene County had the highest average employee compensation of \$92,955, while Hocking County posted the lowest county average of \$48,124 in

2023. When combining all Ohio counties, the statewide average employee compensation in 2023 was \$66,126 per worker, which was a 4.1% increase compared to 2022.

Of the counties in Area 18, Licking County had the highest average employee compensation of \$67,858, ranking 29th highest in Ohio. The next highest average employee compensation in Area 18 was Fairfield County at \$62,224, followed by Hocking County at \$48,124.



### 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](http://www.IMPLAN.com).

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