2012
State of the Region Address

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Center for Regional Development
Bowling Green State University
Outline

• How we have changed
• Changing employment trends
• Temporal view of unemployment
• Implication of layoff events
• Rural vs. urban change
• View to the future
How We Have Changed
2009
Economic Crisis in a Global World

2010
Road to Recovery?

2011
Upside of a Downturn
Toledo MSA Employment Change
2007-2009

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
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<td>76,263</td>
<td>76,634</td>
<td>371</td>
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<tr>
<td>Trade, Transportation, and Utilities</td>
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<td>58,975</td>
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<td>36,274</td>
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<td>Leisure and Hospitality</td>
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<td>31,192</td>
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<td>10,852</td>
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<td>Information</td>
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<tr>
<td>Natural Resources and Mining</td>
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<td>-60</td>
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<td></td>
<td><strong>310,179</strong></td>
<td><strong>279,919</strong></td>
<td><strong>-30,260</strong></td>
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December 2007

Unemployment Rate

- LT 5%
- 5.1 - 7.0%
- 7.1 - 9.0%
- 9.1 - 11.0%
- 11.1 - 13.0%
- 13.1 - 15.0%
- 15.+%
## Toledo MSA Employment Change 2009-2010

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment, 2009</th>
<th>Employment, 2010</th>
<th>Employment Change</th>
<th>Percent Growth, 2009 - 2010</th>
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<tbody>
<tr>
<td>Education and Health Services</td>
<td>76,634</td>
<td>76,484</td>
<td>-150</td>
<td>-0.2</td>
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<tr>
<td>Trade, Transportation, and Utilities</td>
<td>58,975</td>
<td>57,643</td>
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<td>-2.3</td>
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<tr>
<td>Manufacturing</td>
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<td>37,688</td>
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<td>31,499</td>
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<td>31,418</td>
<td>1,431</td>
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<td>Construction</td>
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<td>Public Administration</td>
<td>10,150</td>
<td>10,216</td>
<td>66</td>
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<tr>
<td>Financial Activities</td>
<td>10,852</td>
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<tr>
<td>Other Services</td>
<td>9,737</td>
<td>9,094</td>
<td>-643</td>
<td>-6.6</td>
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<td>Information</td>
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<td>3,353</td>
<td>-42</td>
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<tr>
<td>Natural Resources and Mining</td>
<td>1,300</td>
<td>1,253</td>
<td>-47</td>
<td>-3.6</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>279,919</strong></td>
<td><strong>279,624</strong></td>
<td><strong>-295</strong></td>
<td></td>
</tr>
</tbody>
</table>
Dow Jones Industrials 2009-2012

- 2009: +30.06%
- 2010: +11.02%
- 2011: +5.53%
- 2012: +6.90%

3 YEAR CHANGE: 61.57%
Unemployment Rate for Selected Areas

- Austria: 4.2
- Netherlands: 4.9
- Germany: 5.7
- Czech Republic: 6.8
- Romania: 7.1
- Finland: 7.4
- Ohio: 7.6
- UK: 8.3
- US: 8.3
- Italy: 9.3
- Toledo: 9.3
- France: 10.0
- Poland: 10.2
- Hungary: 11.0
- Greece: 21.0
- Spain: 23.6
## Unemployment Rates for Selected Counties

<table>
<thead>
<tr>
<th>County</th>
<th>June 2009</th>
<th>February 2012</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allan County</td>
<td>11.2%</td>
<td>9.2%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Lucas County</td>
<td>13.6%</td>
<td>9.1%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Wood County</td>
<td>12.3%</td>
<td>8.0%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Fulton County</td>
<td>14.8%</td>
<td>10.0%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Williams County</td>
<td>16.7%</td>
<td>9.4%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Ottawa County</td>
<td>12.8%</td>
<td>14.3%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Erie County</td>
<td>10.5%</td>
<td>9.4%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

Ohio Underemployment rate is 15.2% for third quarter 2011
Michigan Underemployment rate is 19% for third quarter 2011
Changing Employment Trends
Ohio Employment from 1990
Wood County from 1990

Employment

- Avg-1990
- Avg-1991
- Avg-1992
- Avg-1993
- Avg-1994
- Avg-1995
- Avg-1996
- Avg-1997
- Avg-1998
- Avg-1999
- Avg-2000
- Avg-2001
- Avg-2002
- Avg-2003
- Avg-2004
- Avg-2005
- Avg-2006
- Avg-2007
- Avg-2008
- Avg-2009
- Avg-2010
- Avg-2011
Temporal View of Unemployment Changes
All Ohio Counties

Rate Clock
CRD Spatial Toolbox
Wood County

Rate Clock
CRD Spatial Toolbox

County Name: Wood
All Counties' AVG

Begin: DEC_07
End: Feb_12
Fulton County

Rate Clock
CRD Spatial Toolbox

County Name: Fulton
All Counties’ AVG
Ottawa County

Rate Clock
CRD Spatial Toolbox

County Name: Ottawa
All Counties' AVG

Begin: DEC_07
End: Feb_12
Toledo MSA

Fulton
Lucas
Ottawa
Wood

Rate Clock
CRD Spatial Toolbox
Implications of Layoff Events
2008

Warn Notice CRD
Spatial Toolbox
2010

Warn Notice CRD
Spatial Toolbox
2012 Layoff Events

• 2,437 workers affected statewide
• 329 in NW Ohio
  – **Edon**
    • Diversified Machine (8 jobs permanent and 65 temporary layoff) Lost Ford as a customer
  – **Delta**
    • Graham Packaging (65 jobs; plant closure)
  – **Tiffin**
    • PCCW Teleservices (128 jobs; closure)
  – **Toledo**
    • WUPW Broadcasting (63 jobs)
## Affected Occupations Statewide 2012

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>158</td>
</tr>
<tr>
<td>Professional</td>
<td>251</td>
</tr>
<tr>
<td>Service</td>
<td>121</td>
</tr>
<tr>
<td>Sales</td>
<td>462</td>
</tr>
<tr>
<td>Office</td>
<td>485</td>
</tr>
<tr>
<td>Construction</td>
<td>8</td>
</tr>
<tr>
<td>Maintenance</td>
<td>105</td>
</tr>
<tr>
<td>Production</td>
<td>412</td>
</tr>
<tr>
<td>Transportation</td>
<td>435</td>
</tr>
<tr>
<td>Total</td>
<td>2,437</td>
</tr>
</tbody>
</table>
Selected Occupations

- Top executives: 39
- Retail Sales: 271
- Motor vehicle operators: 123
- Secretaries: 36
- Nursing/home healthcare: 47
- Operations managers: 32
- Computer specialists: 48
Rural Vs. Urban

• Nationally rural counties weathered the recession better that urban counties
  – Large agricultural sector
  – Limited manufacturing sector
  – Limited construction sector

• Ohio rural counties have a significant manufacturing presence
Holiday City

Labor Shed Module
CRD Spatial Toolbox
Holiday City (Exit 13)
½ Mile Radius

Information
Selected nodes: 1
Total nodes: 15

Labor Shed Module
CRD Spatial Toolbox

Setting
Circle Radius: 0.5 Miles
Driving Time: 15 Min

Map Satellite
Holiday City (Exit 13)

- Employment 737
  Selected Occupations
    - Office and administrative 101
    - Production 231
    - Transportation 8
    - Sales 64
    - Management 51
    - Repair / Maintenance 53
Future Changes
<table>
<thead>
<tr>
<th>Industry</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>-14.9%</td>
</tr>
<tr>
<td>Construction</td>
<td>11.4%</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>21.2%</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>1.9%</td>
</tr>
<tr>
<td>Retail trade</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Transportation and warehousing</td>
<td>9.5%</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>3.6%</td>
</tr>
<tr>
<td>Professional and technical services</td>
<td>22.5%</td>
</tr>
<tr>
<td>Education services</td>
<td>13.7%</td>
</tr>
<tr>
<td>Government</td>
<td>0.5%</td>
</tr>
</tbody>
</table>
Challenges

• Nationally
  – European recession
  – Oil Prices
  – Washington

• Regionally
  – Alternative energy
  – State funding to local governments
  – Fear of change
Thank you

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Bowling Green State University