

State of the Region Address 2013

Michael C. Carroll
Center for Regional Development



unlucky

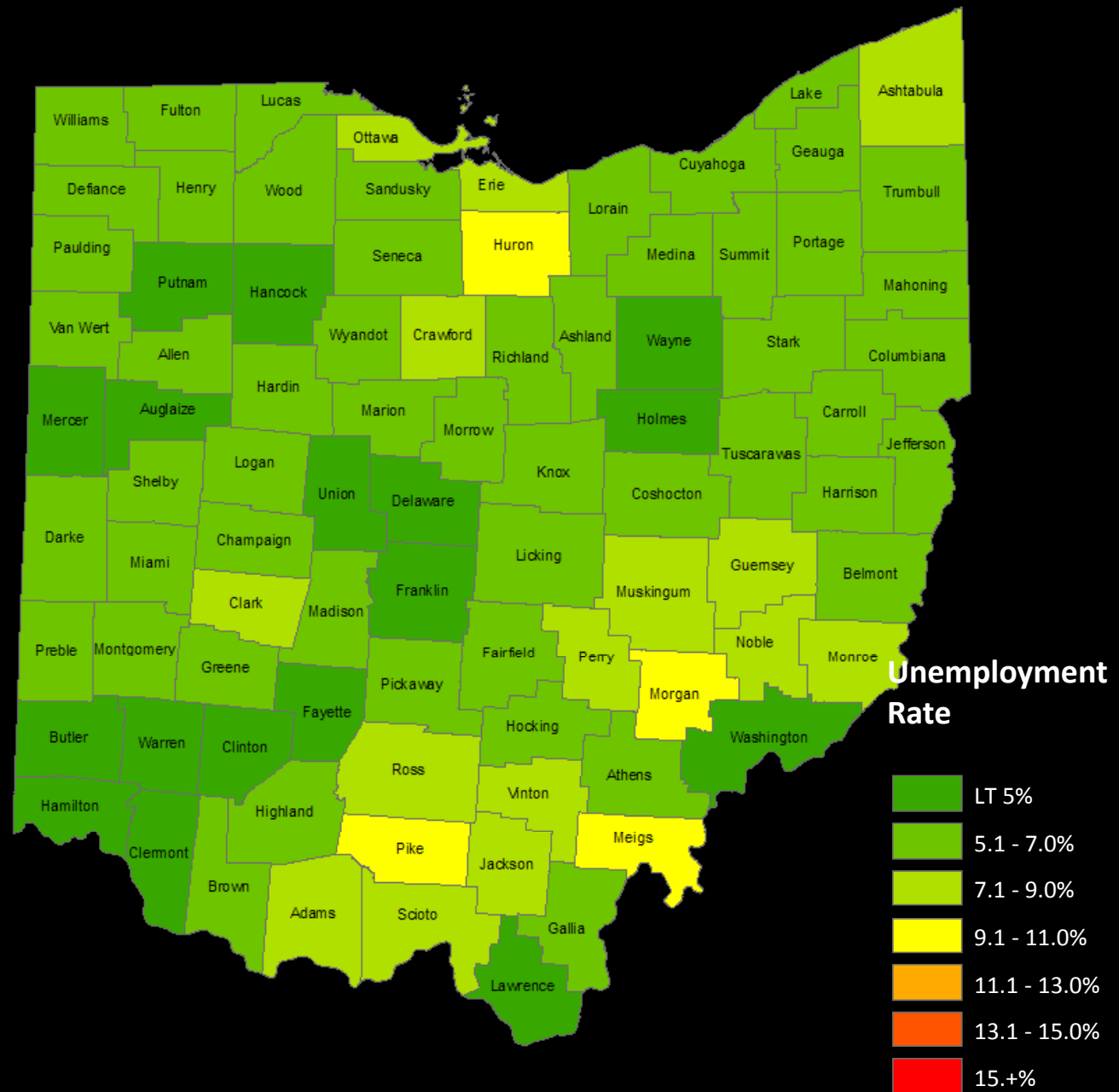
CENTER FOR REGIONAL DEVELOPMENT'S
ANNUAL STATE OF THE REGION CONFERENCE

BGSU.

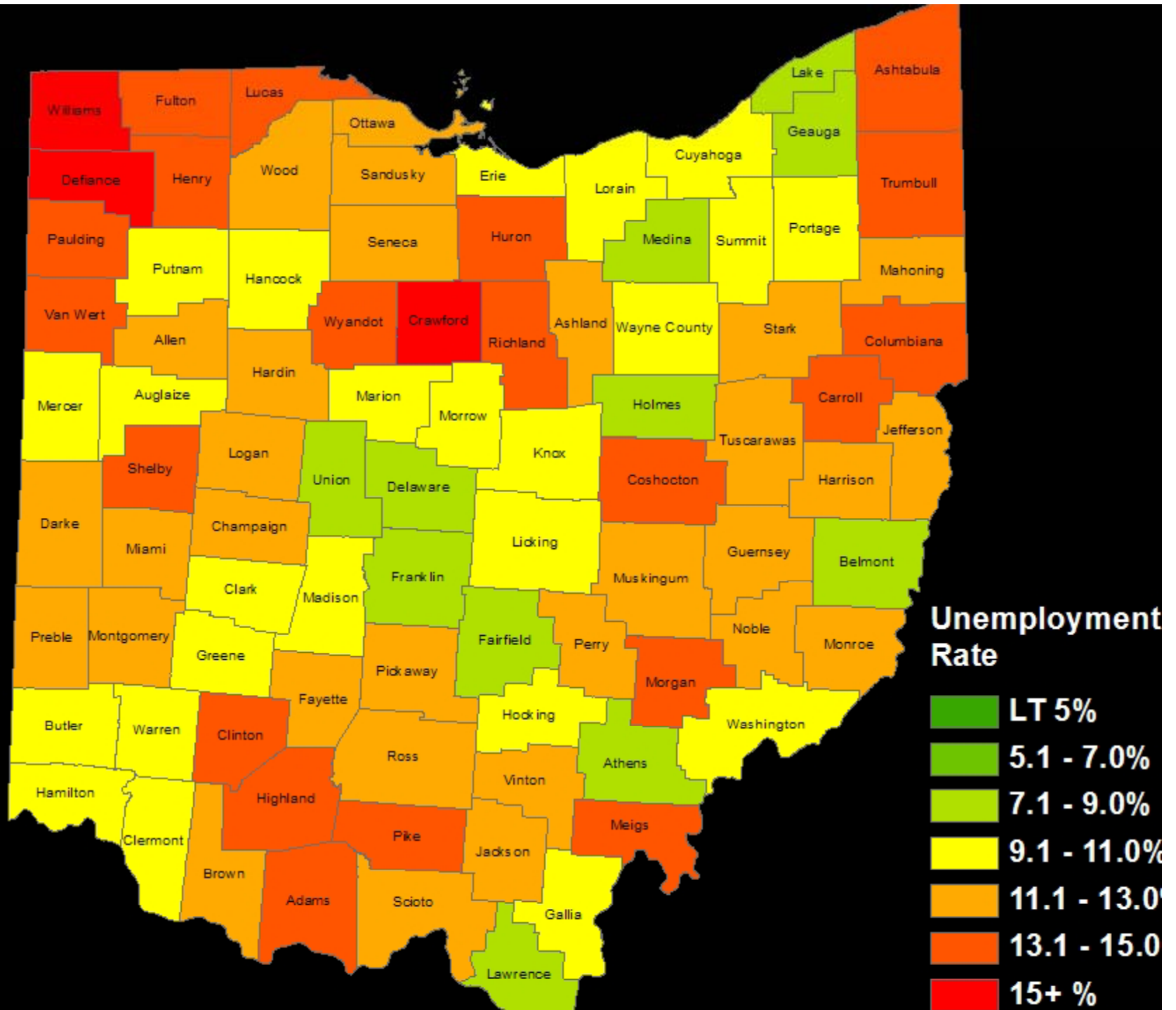
Outline

- Current Recovery
- Regional Structure
- Regional Contagion
- A View to the Future

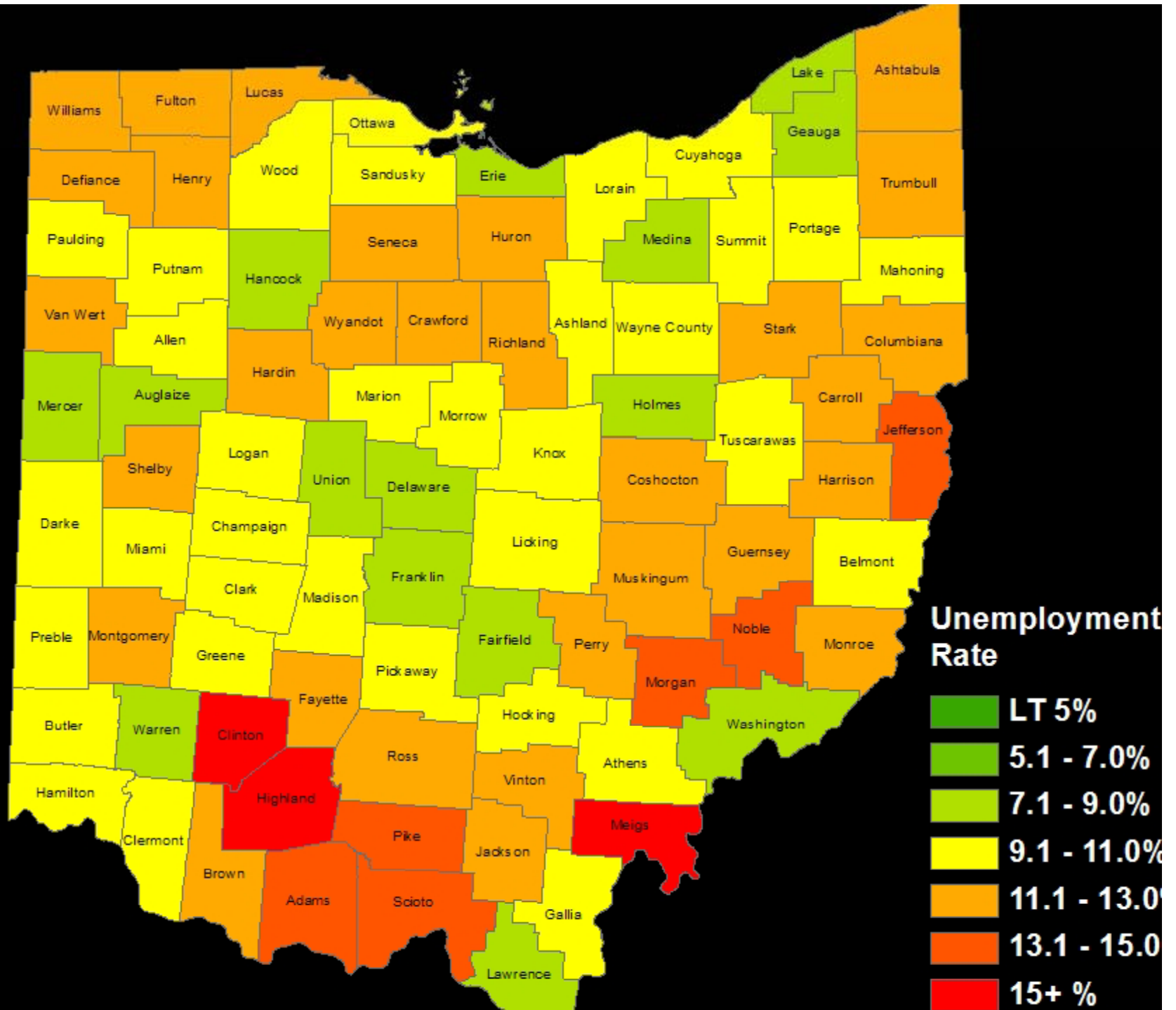
December 2007



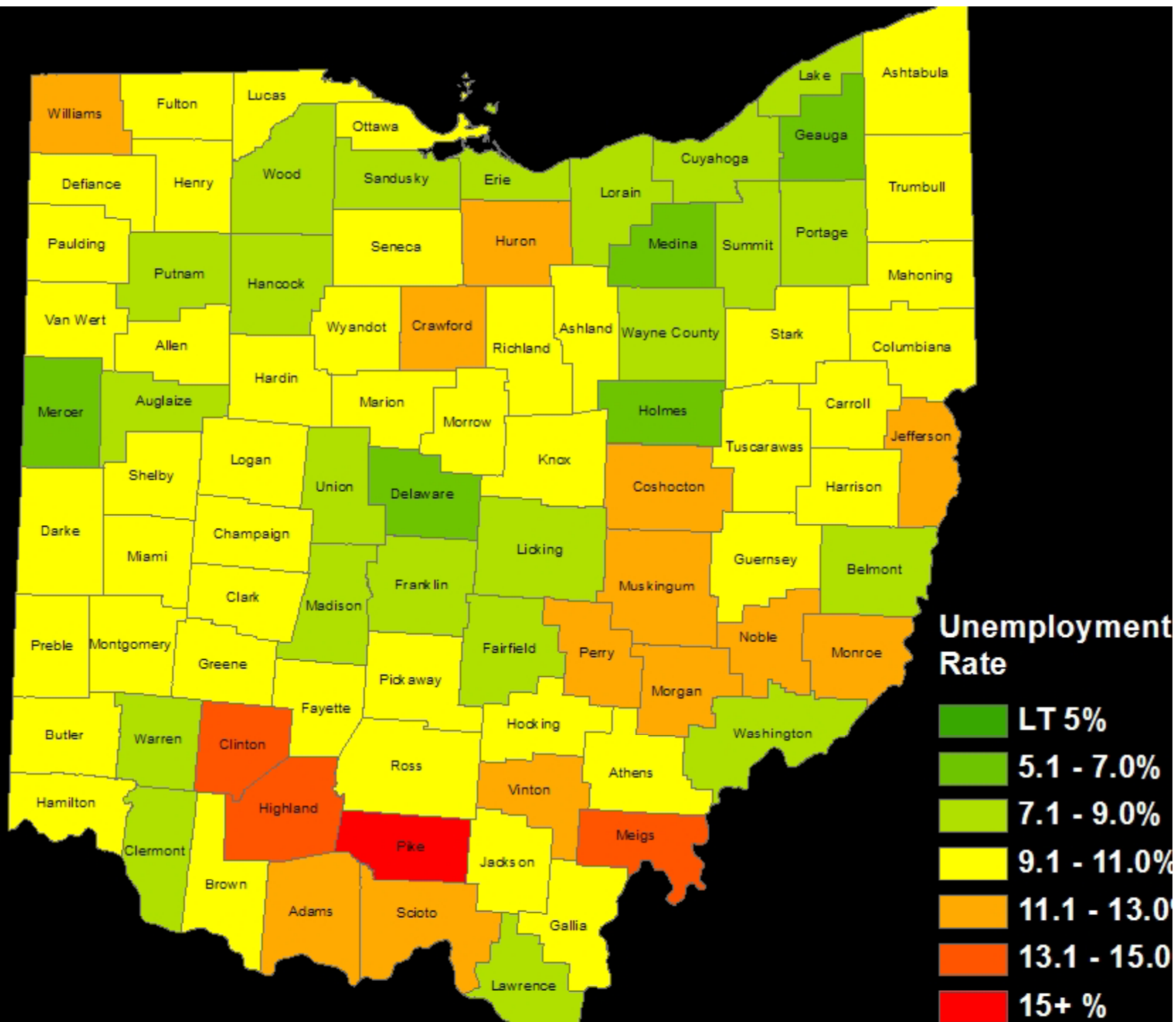
June
2009



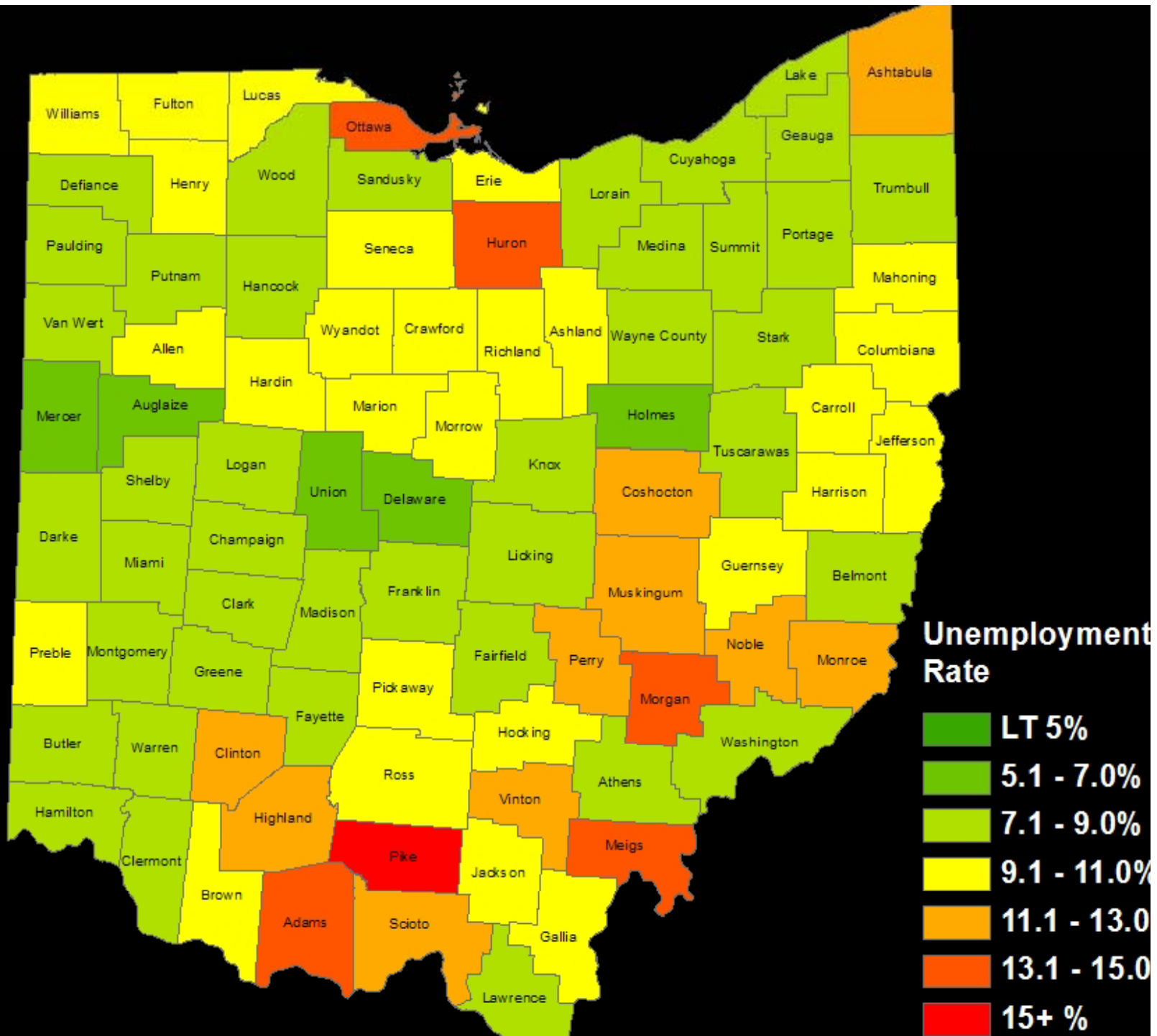
June
2010



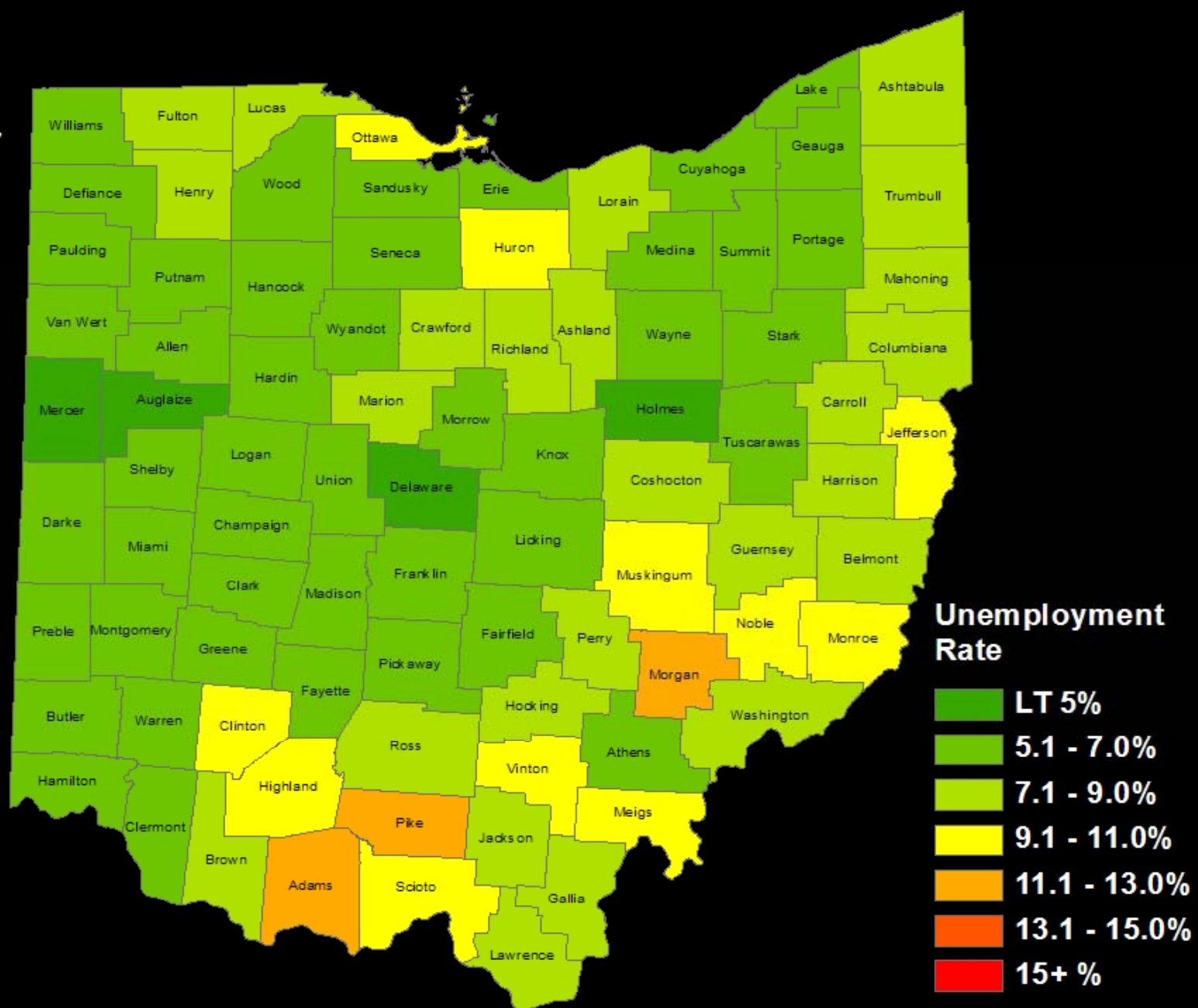
June
2011



February 2012

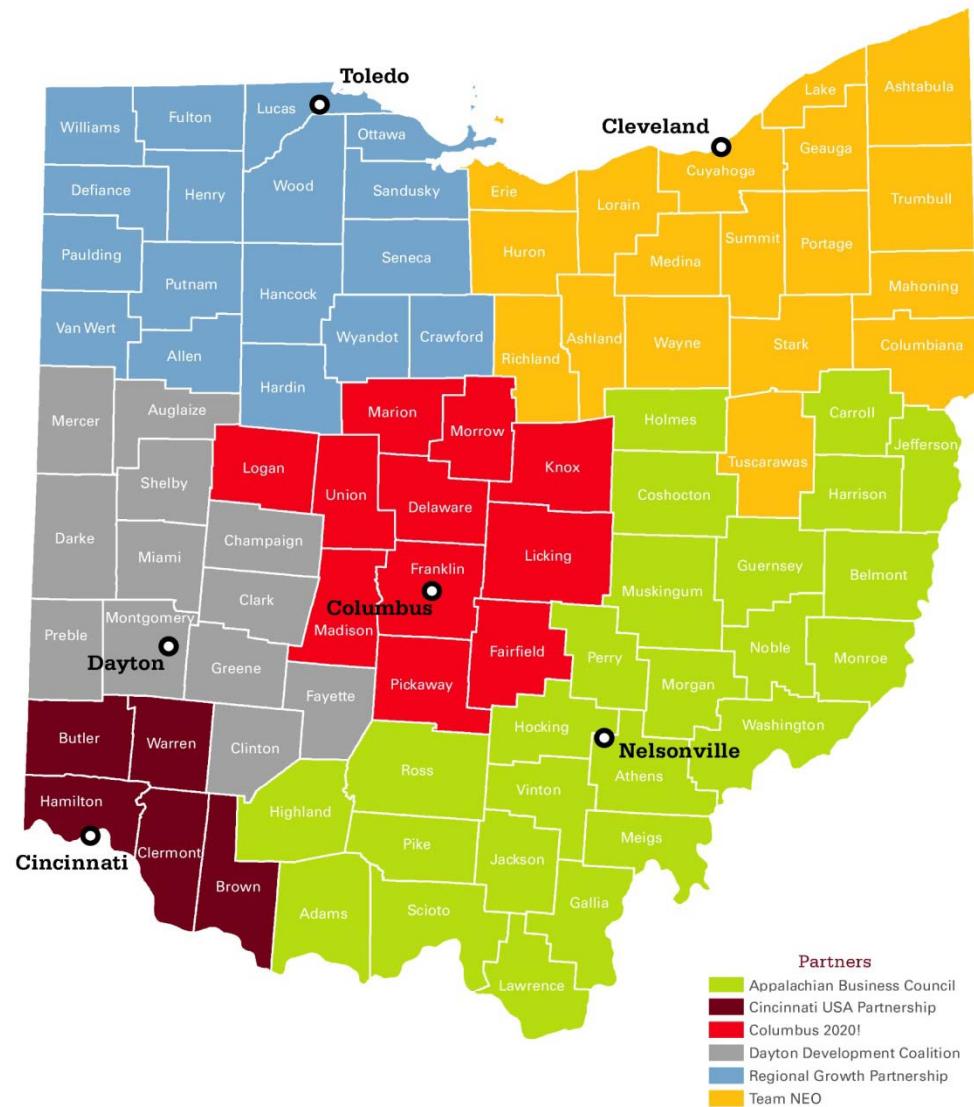


December
2012



17 County Region

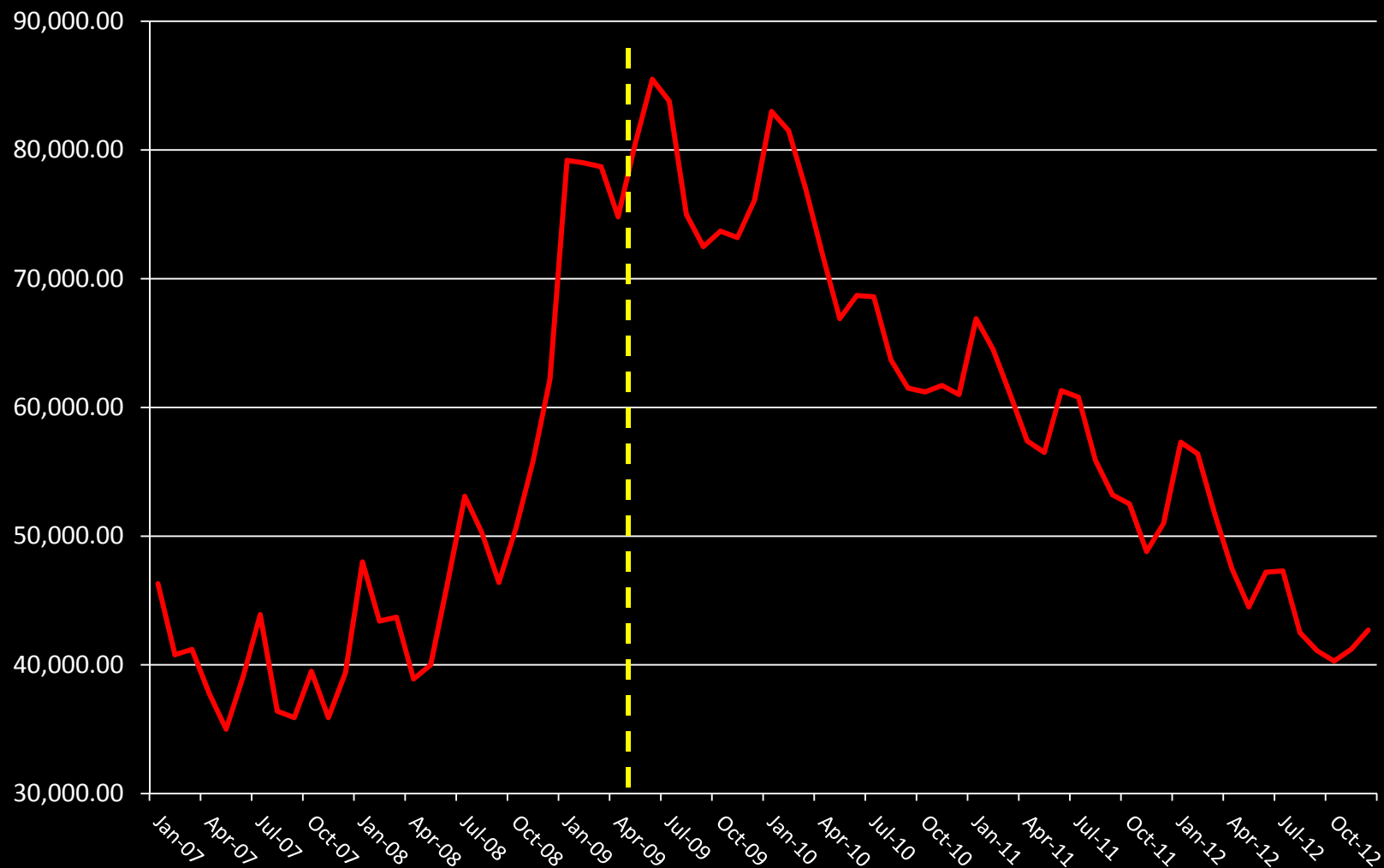
**JobsOhio
Network**



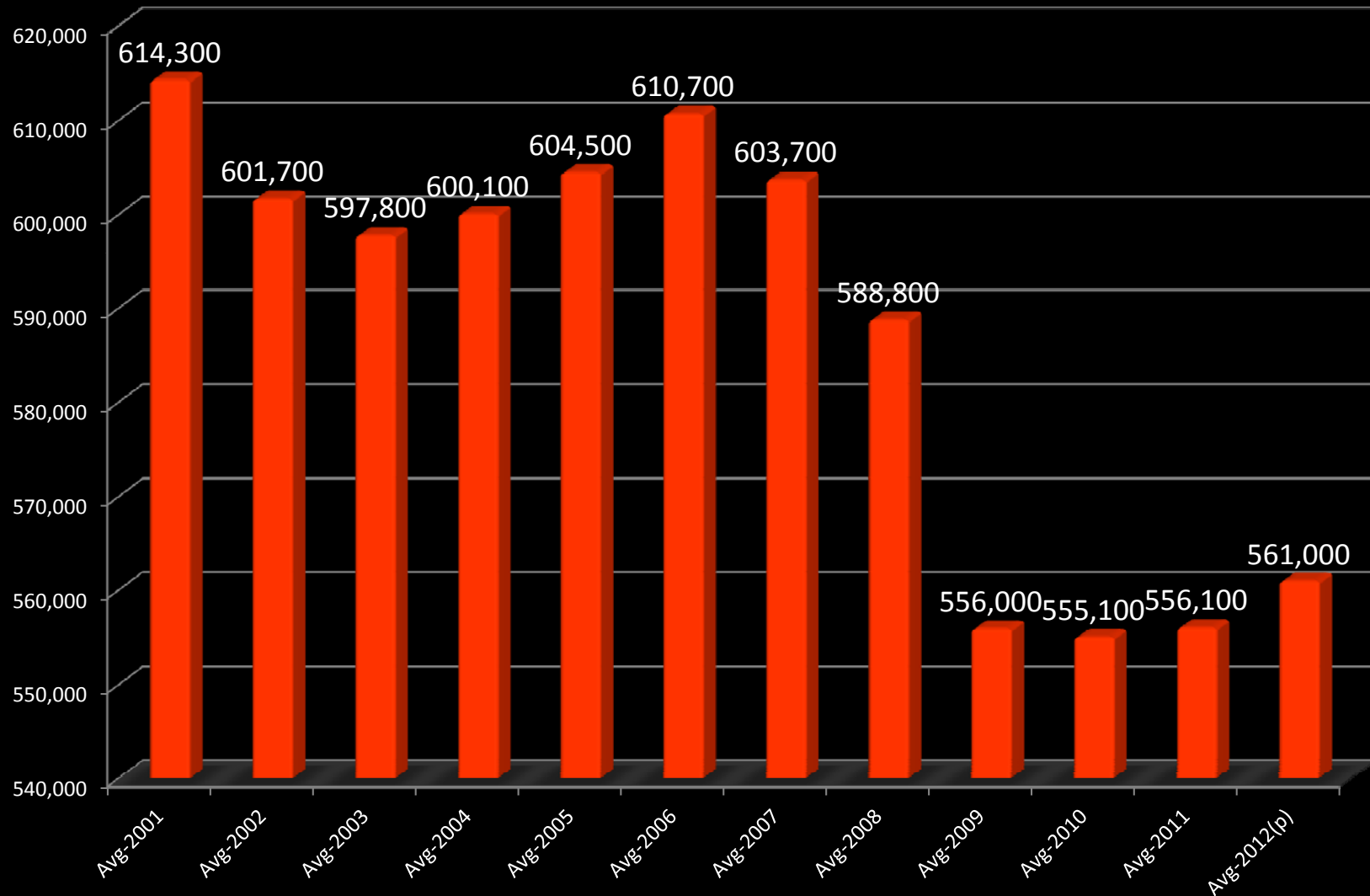
Unemployment Rate 17 County NW Ohio Region



Unemployed in 17 County NW Ohio Region



Employment in 17 County NW Ohio Region



Job Creation 2009-2012

	Created
Allen	600
Crawford	-100
Defiance	-200
Fulton	800
Hancock	1,200
Hardin	100
Henry	400
Lucas	-2,600
Ottawa	800

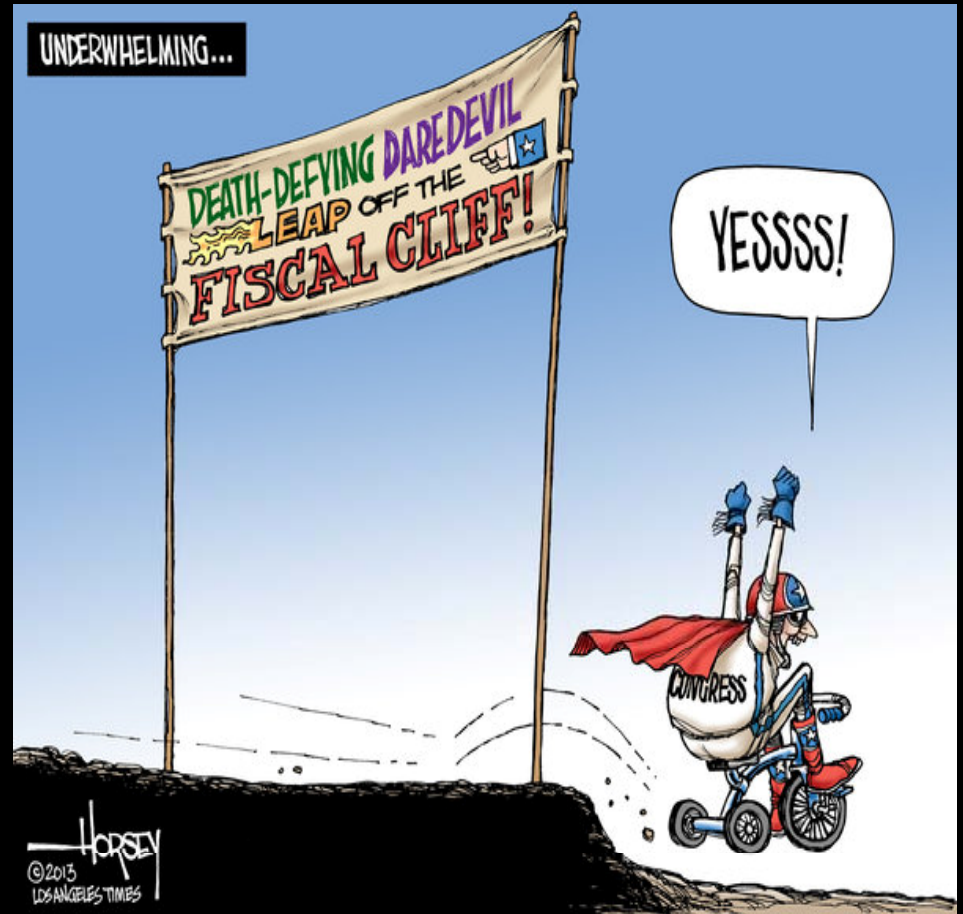
	Created
Paulding	200
Putnam	600
Sandusky	1,000
Seneca	-600
Van Wert	0
Williams	300
Wood	2,100
Wyandot	400
Total	5,000

Projected Recovery Date

2035

Recovery Arithmetic

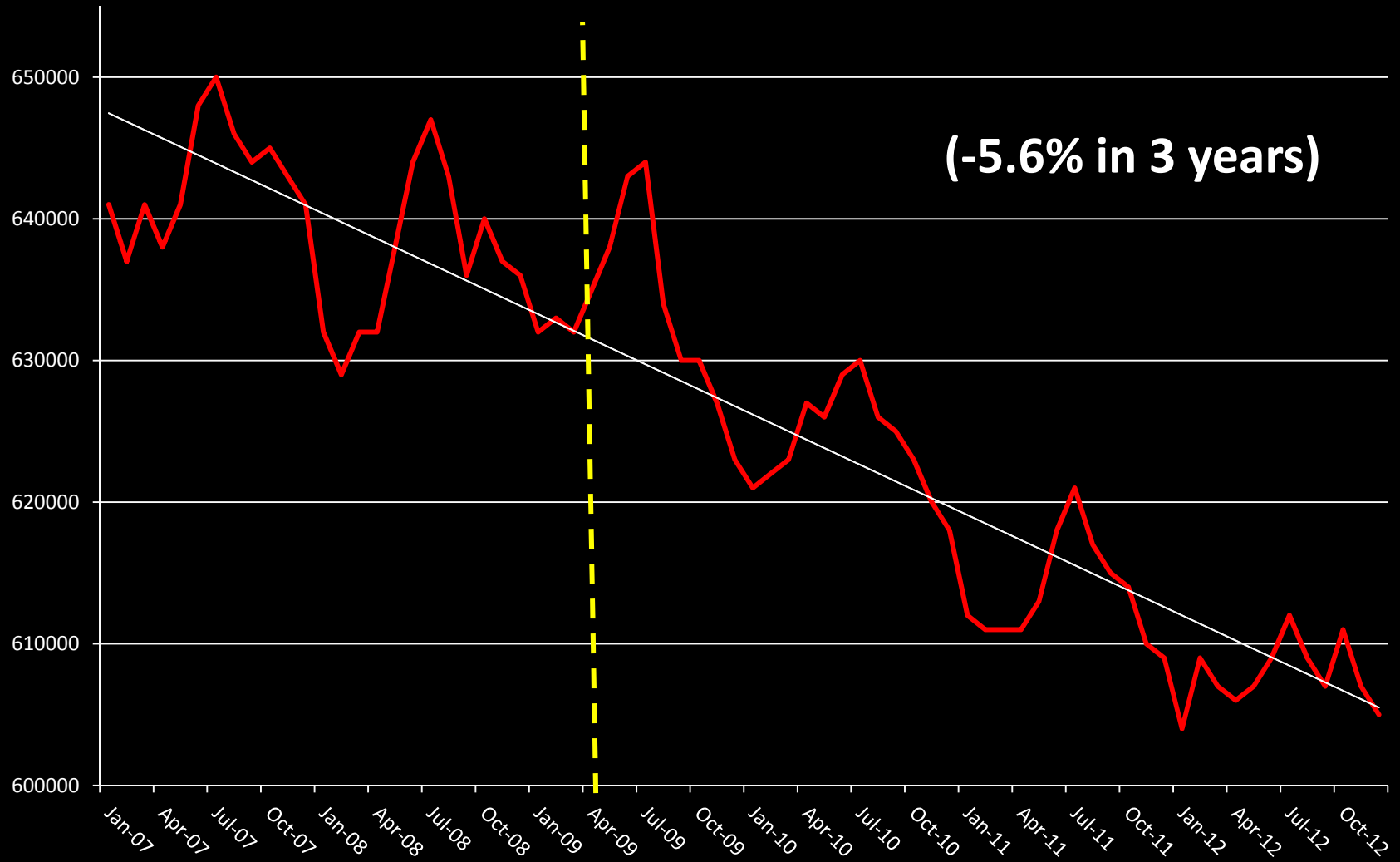
- Lost 42,500 jobs in 18 months
- Gained 5,000 jobs in past 36 months
- 139 jobs per month
- 270 months
- 22.45 years
- 2035 (March or April)



Unemployment Rate 17 County NW Ohio Region



Labor Force 17 County NW Ohio Region



Population Change 2000-2010

Percent Change	
Allen	-2.0%
Crawford	-6.8%
Defiance	-1.2%
Fulton	1.5%
Hancock	4.9%
Hardin	.4%
Henry	3.4%
Lucas	-2.9%
Ottawa	1.1%

Percent Change	
Paulding	-3.3%
Putnam	-.7%
Sandusky	-1.4%
Seneca	-3.3%
Van Wert	-3.1%
Williams	-3.9%
Wood	3.7%
Wyandot	-1.3%
Region Total	-1.38%

Projected Economic Growth

	North	South
Industry	Expected Growth 2008-2018	Expected Growth 2008-2018
Natural Resources, Ag. & Mining	-4.0%	-4.5%
Construction	4.3%	10.6%
Manufacturing	-16.9%	-12.7%
Trade, Transportation and Utilities	2.2%	2.7%
Information	-10.6%	0.0%
Financial Activities	5.3%	5.5%
Professional and Business Services	9.4%	15.3%
Education and Health Services	19.6%	18.8%
Leisure and Hospitality	1.7%	0.7%
Other Services	4.2%	8.6%
Government	-0.2%	-2.3%

Ohio 2020 Projections

- Of the high wage job (\$15.67/hr) openings through 2020
- 64% require a college education
 - 22% Associate's degree
 - 42% Bachelor's degree or higher

County Details



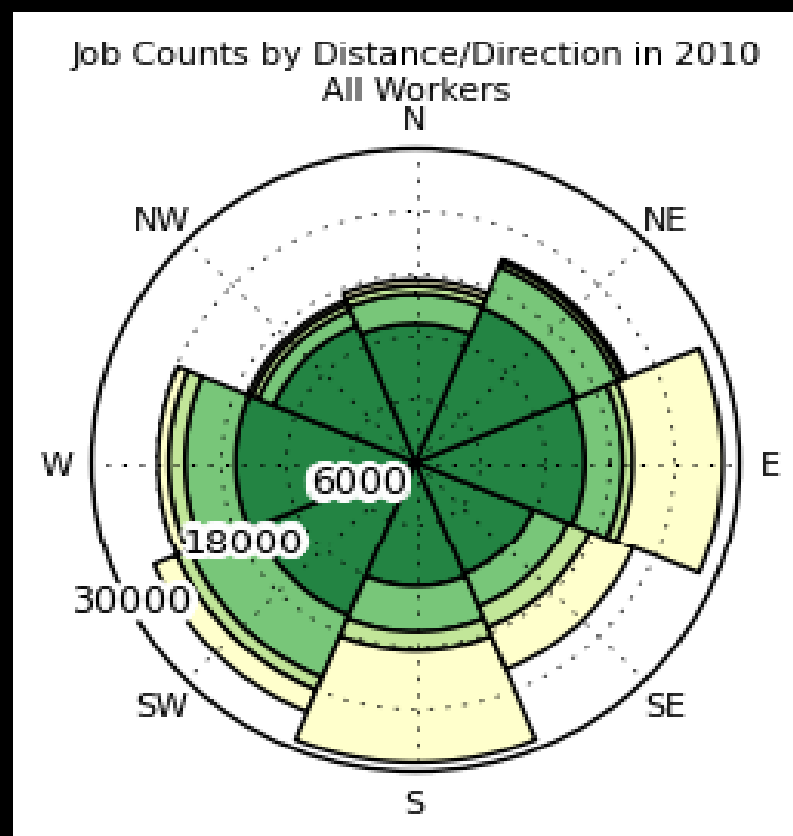
- Lucas County
- Williams County
- Sandusky County
- Allen County
- Wood County
- Hancock County

Lucas County

Amounts

	2010	2002
	Share	Share
Less than 10 miles	62.8%	69.0%
10 to 24 miles	16.8%	15.3%
25 to 50 miles	5.3%	4.9%
Greater than 50 miles	15.1%	10.9%

Direction

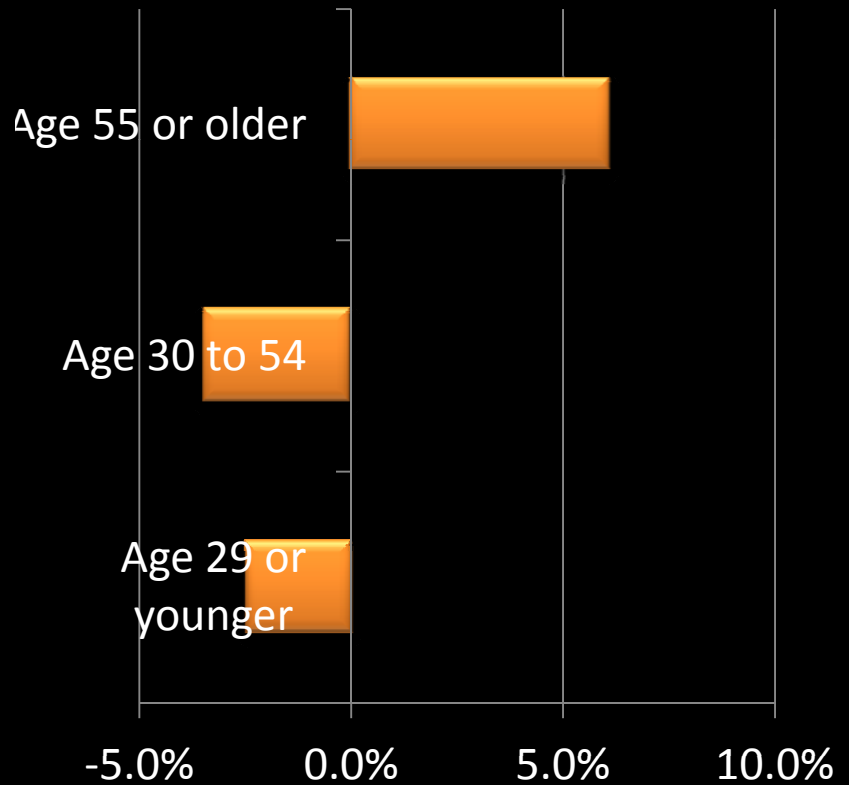


Lucas County

Amounts

	2010	2002
Total Primary Jobs	184,854	212,483
Age 29 or younger	23.9%	26.4%
Age 30 to 54	56.4%	59.9%
Age 55 or older	19.8%	13.7%

Change



Lucas County

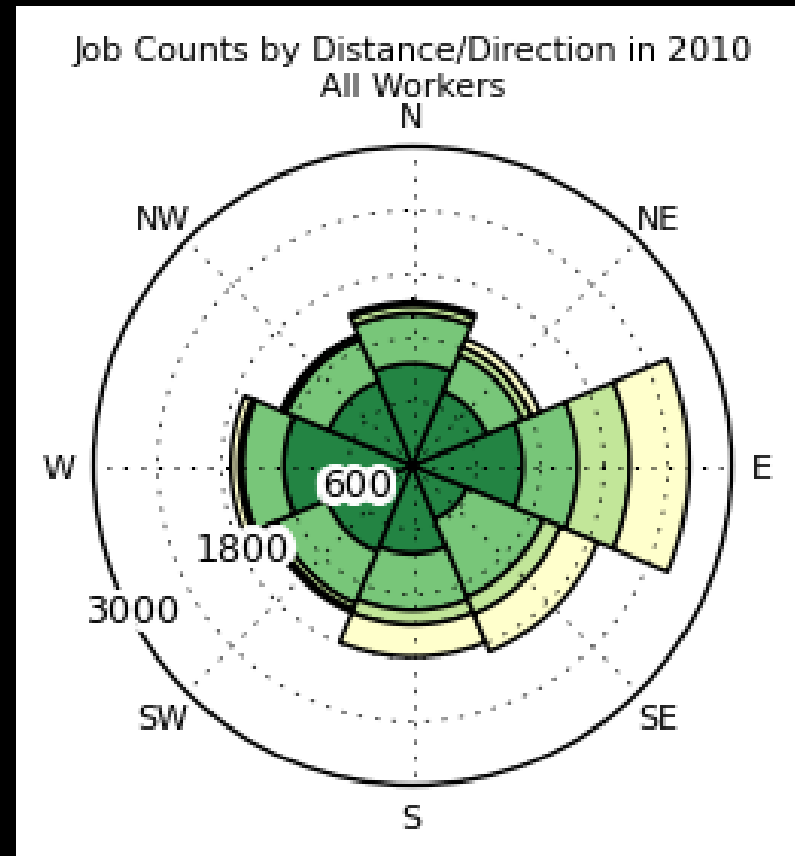
Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	6,981	3.8%	9,854	4.6%
Manufacturing	20,025	10.8%	31,480	14.8%
Wholesale Trade	6,775	3.7%	8,376	3.9%
Retail Trade	20,322	11.0%	25,761	12.1%
Transportation and Warehousing	7,422	4.0%	8,818	4.1%
Professional, Scientific, and Technical Services	9,583	5.2%	9,790	4.6%
Educational Services	17,034	9.2%	15,927	7.5%
Health Care and Social Assistance	39,995	21.6%	37,056	17.4%

Williams County

Amounts

	2010	2002
Total Primary Jobs	13,640	15,924
Less than 10 miles	51.7%	53.1%
10 to 24 miles	29.3%	29.4%
25 to 50 miles	8.0%	8.2%
Greater than 50 miles	11.0%	9.2%

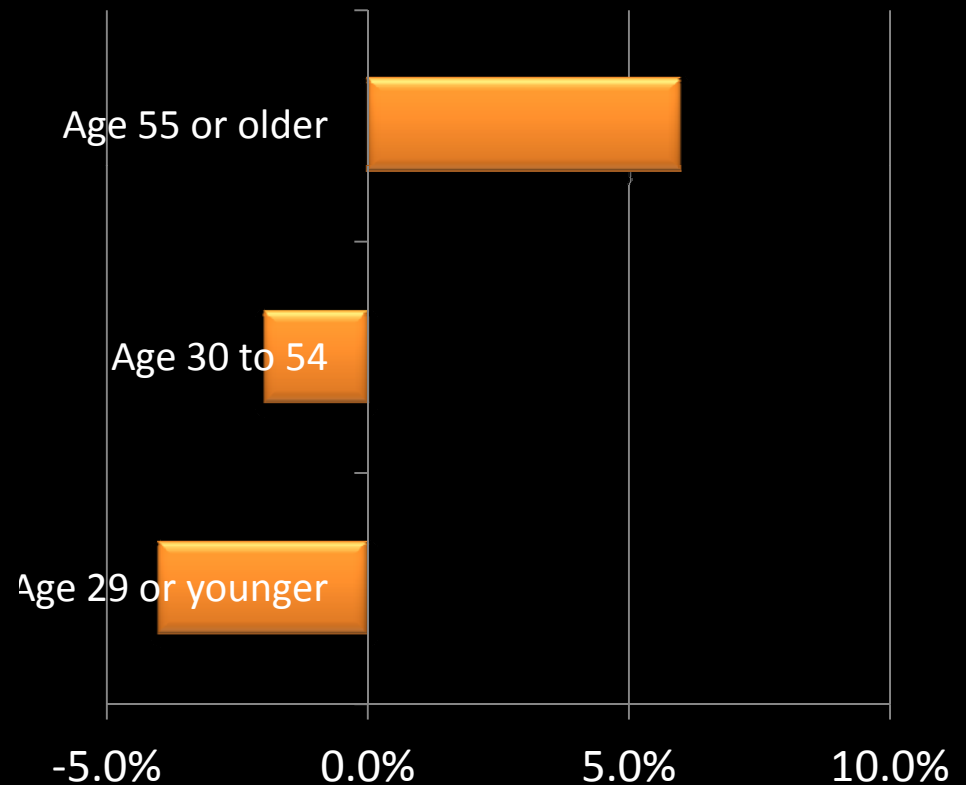
Direction



Williams County

Amounts

	2010	2002
Total Primary Jobs	13,640	15,924
Age 29 or younger	19.8%	23.8%
Age 30 to 54	57.3%	59.3%
Age 55 or older	22.9%	16.9%



Williams County

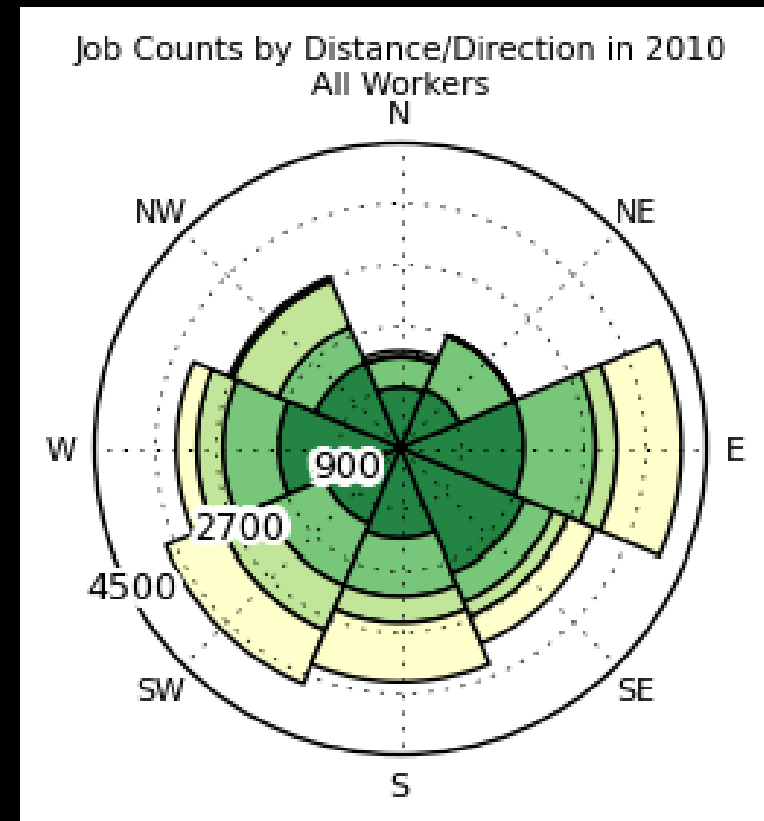
Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	457	3.4%	496	3.1%
Manufacturing	5,448	39.9%	7,296	45.8%
Wholesale Trade	655	4.8%	451	2.8%
Retail Trade	1,400	10.3%	1,219	7.7%
Transportation and Warehousing	291	2.1%	293	1.8%
Professional, Scientific, and Technical Services	157	1.2%	136	0.9%
Educational Services	1,027	7.5%	1,427	9.0%
Health Care and Social Assistance	1,651	12.1%	1,614	10.1%

Sandusky County

Amounts

	2010	2002
Total Primary Jobs	23,638	26,395
Less than 10 miles	47.8%	52.8%
10 to 24 miles	25.5%	24.3%
25 to 50 miles	11.8%	10.7%
Greater than 50 miles	15.0%	12.2%

Direction

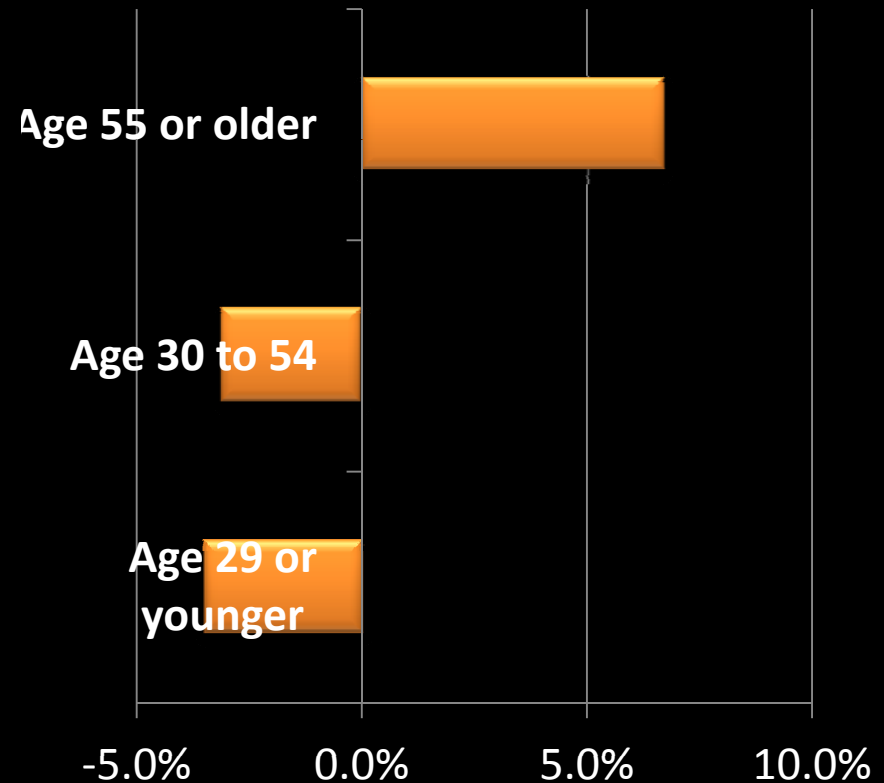


Sandusky County

Amounts

	2010	2002
Total Primary Jobs	23,638	26,395
Age 29 or younger	20.4%	23.9%
Age 30 to 54	58.8%	61.9%
Age 55 or older	20.9%	14.2%

Change



Sandusky County

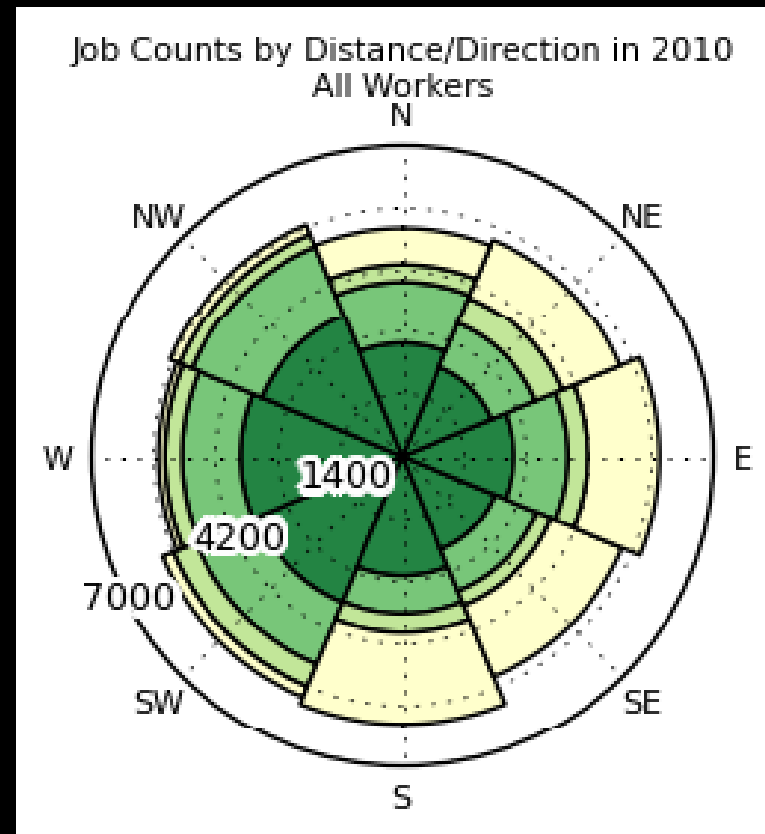
Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	746	3.2%	1,208	4.6%
Manufacturing	8,650	36.6%	10,428	39.5%
Wholesale Trade	491	2.1%	636	2.4%
Retail Trade	2,299	9.7%	2,496	9.5%
Transportation and Warehousing	499	2.1%	372	1.4%
Professional, Scientific, and Technical Services	409	1.7%	414	1.6%
Educational Services	1,763	7.5%	2,450	9.3%
Health Care and Social Assistance	3,385	14.3%	2,782	10.5%

Allen County

Amounts

	2010	2002
Total Primary Jobs	44,600	46,791
Less than 10 miles	51.0%	49.8%
10 to 24 miles	22.6%	21.3%
25 to 50 miles	7.8%	9.1%
Greater than 50 miles	18.5%	19.8%

Direction

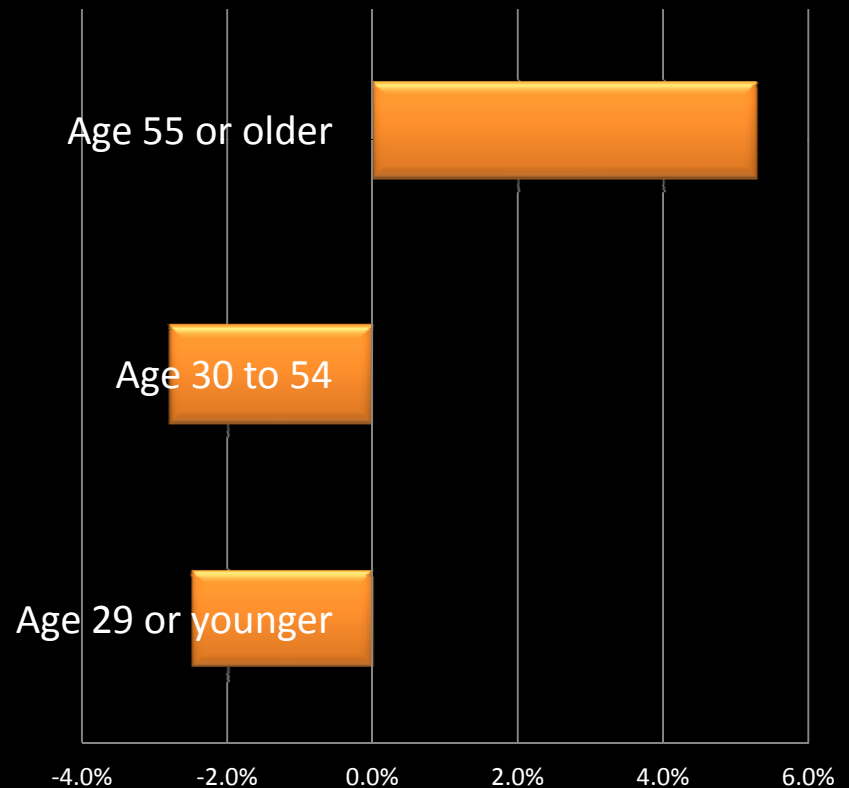


Allen County

Amounts

	2010	2002
Total Primary Jobs	44,600	46,791
Age 29 or younger	23.8%	26.3%
Age 30 to 54	56.3%	59.1%
Age 55 or older	19.9%	14.6%

Change



Allen County

Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	1,474	3.3%	2,114	4.5%
Manufacturing	8,343	18.7%	10,499	22.4%
Wholesale Trade	2,310	5.2%	2,128	4.5%
Retail Trade	5,355	12.0%	5,809	12.4%
Transportation and Warehousing	1,270	2.8%	1,071	2.3%
Professional, Scientific, and Technical Services	1,053	2.4%	950	2.0%
Educational Services	3,558	8.0%	3,775	8.1%
Health Care and Social Assistance	8,883	19.9%	7,502	16.0%

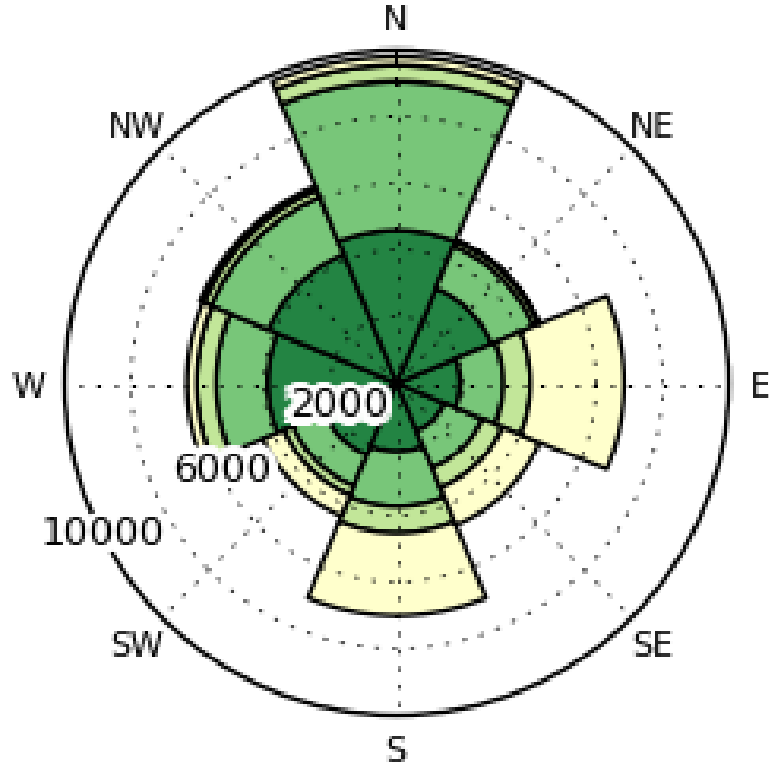
Wood County

Amounts

	2010	2002
Total Primary Jobs	50,054	47,140
Less than 10 miles	47.2%	53.5%
10 to 24 miles	28.9%	28.3%
25 to 50 miles	8.1%	7.5%
Greater than 50 miles	15.8%	10.7%

Direction

Job Counts by Distance/Direction in 2010
All Workers

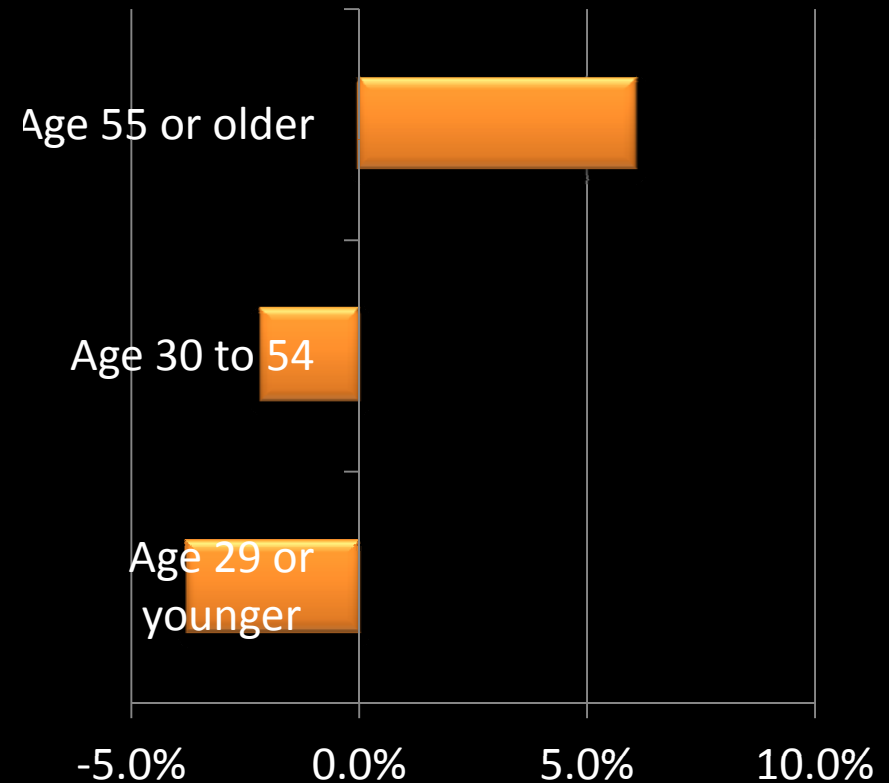


Wood County

Amounts

	2010	2002
Total Primary Jobs	50,054	47,140
Age 29 or younger	24.3%	28.1%
Age 30 to 54	56.7%	58.9%
Age 55 or older	19.0%	12.9%

Change



Wood County

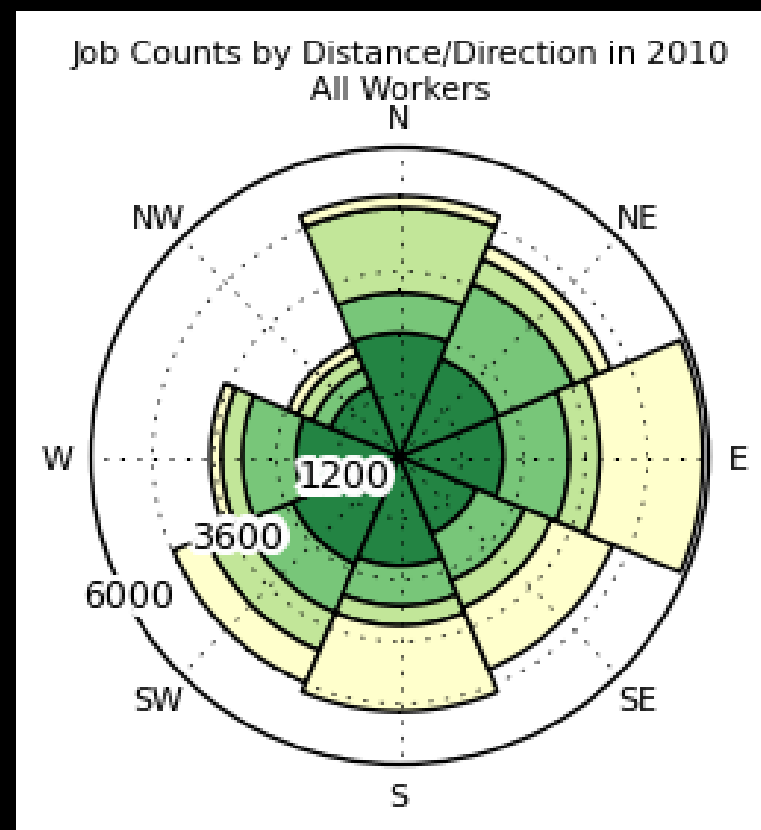
Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	1,479	3.0%	2,980	6.3%
Manufacturing	10,996	22.0%	11,140	23.6%
Wholesale Trade	2,866	5.7%	2,439	5.2%
Retail Trade	4,692	9.4%	4,946	10.5%
Transportation and Warehousing	2,966	5.9%	1,463	3.1%
Professional, Scientific, and Technical Services	1,417	2.8%	1,905	4.0%
Educational Services	7,529	15.0%	6,791	14.4%
Health Care and Social Assistance	4,571	9.1%	4,097	8.7%

Hancock County

Amounts

	2010	2002
Total Primary Jobs	35,622	37,813
Less than 10 miles	44.8%	51.0%
10 to 24 miles	22.1%	22.1%
25 to 50 miles	14.6%	13.1%
Greater than 50 miles	18.5%	13.8%

Direction

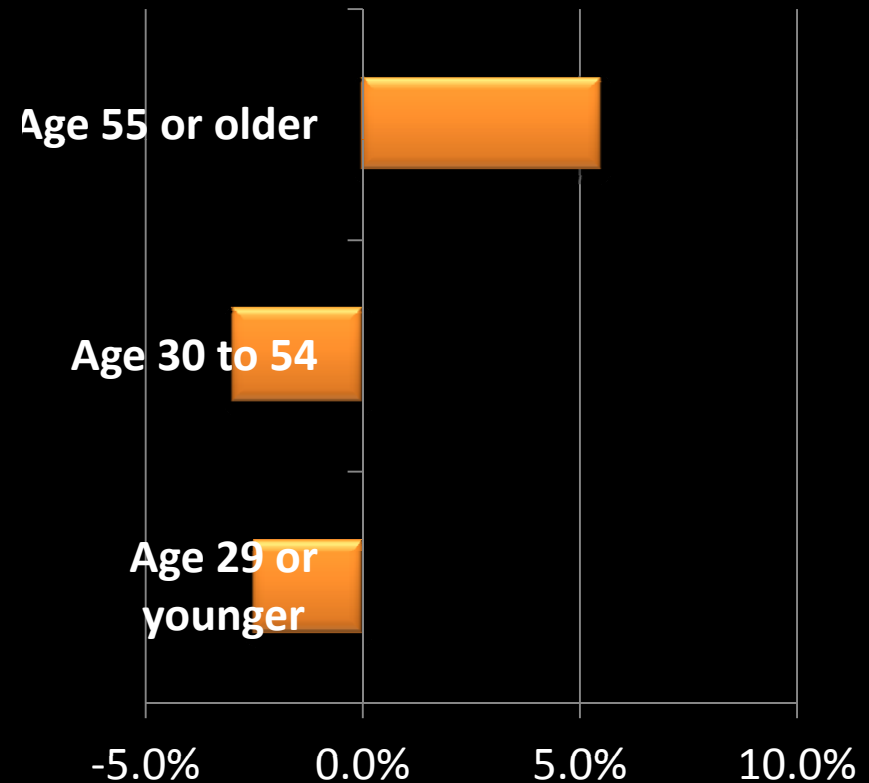


Hancock County

Amounts

	2010	2002
Total Primary Jobs	35,622	37,813
Age 29 or younger	23.7%	26.2%
Age 30 to 54	57.7%	60.7%
Age 55 or older	18.6%	13.1%

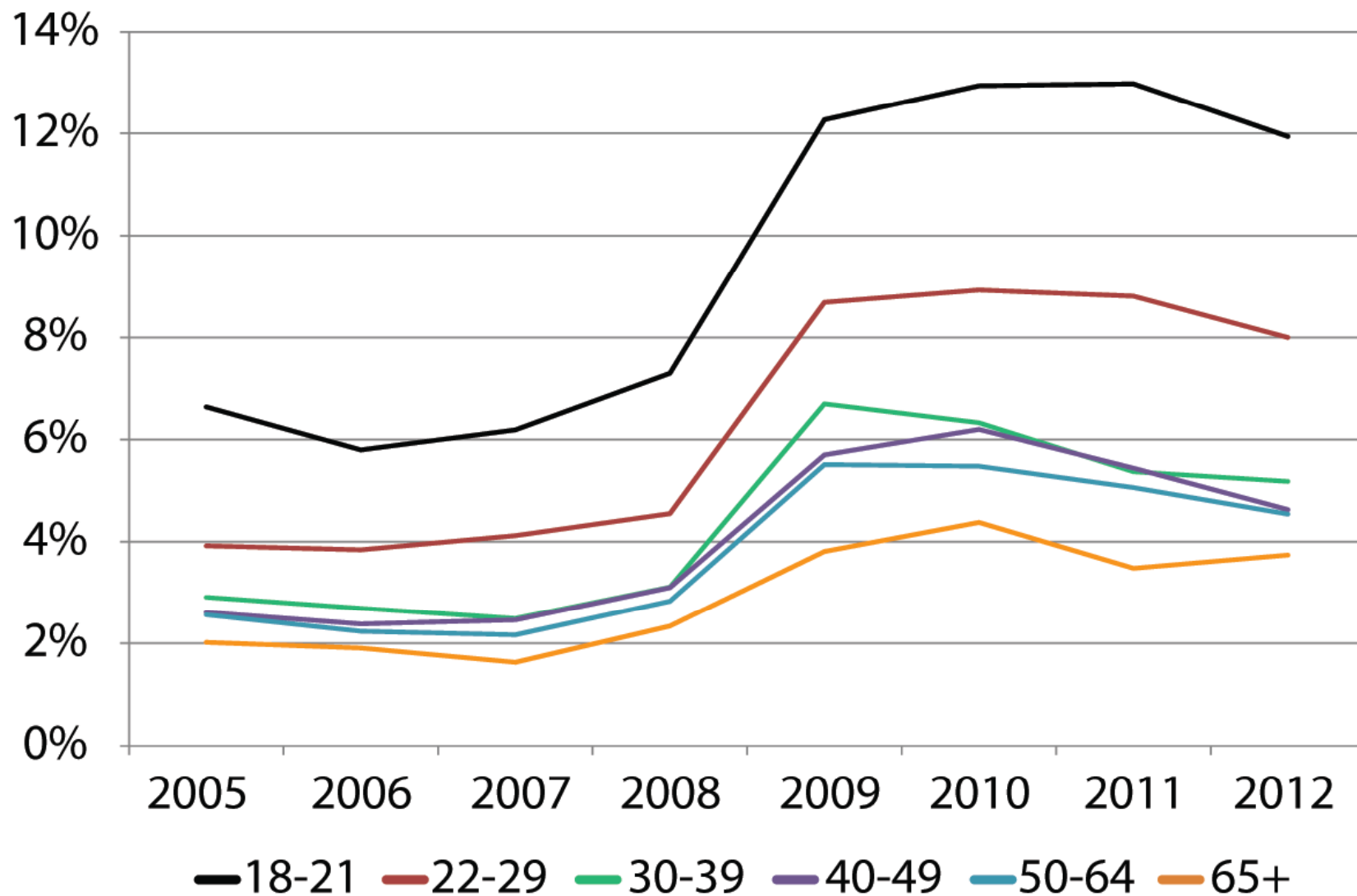
Direction



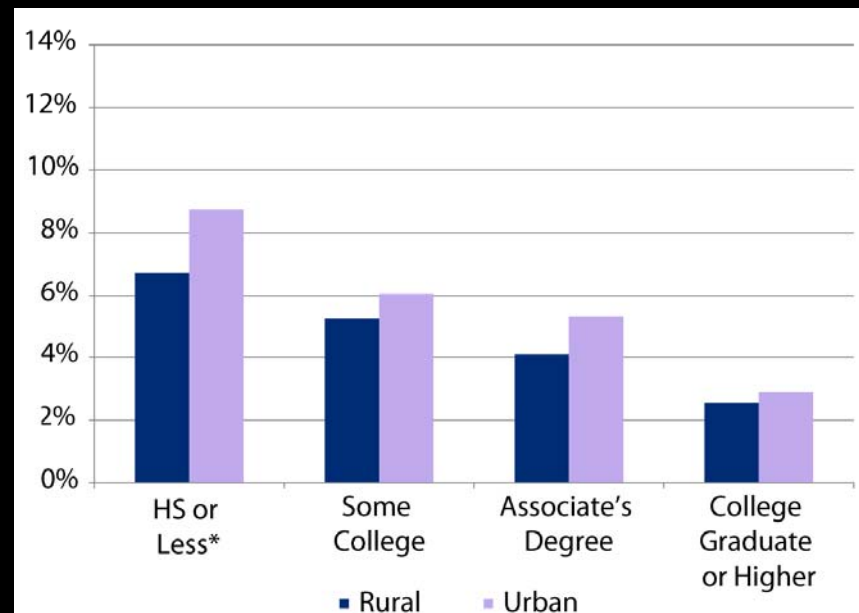
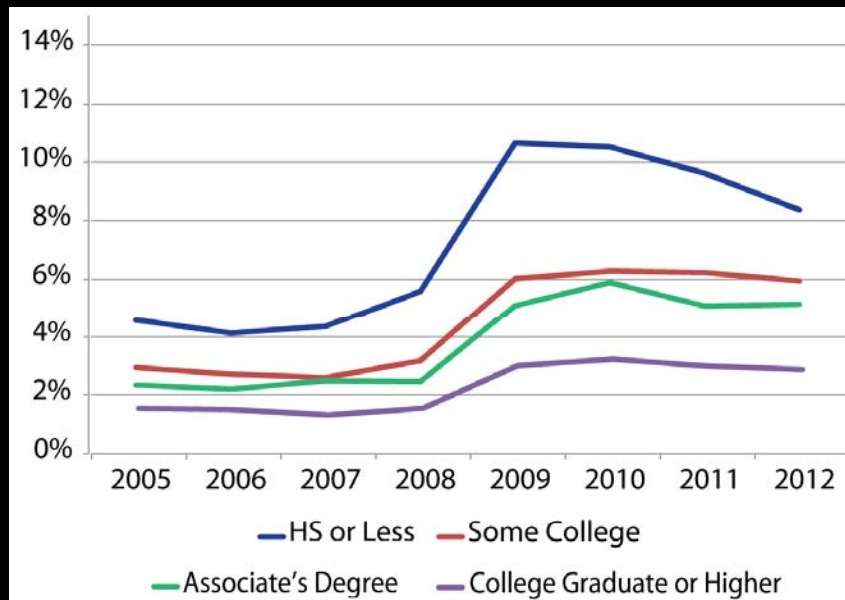
Hancock County

Selected Industries	2010		2002	
	Count	Share	Count	Share
Construction	989	2.8%	1,096	2.9%
Manufacturing	8,724	24.5%	11,161	29.5%
Wholesale Trade	1,341	3.8%	1,321	3.5%
Retail Trade	3,791	10.6%	4,746	12.6%
Transportation and Warehousing	2,169	6.1%	1,535	4.1%
Professional, Scientific, and Technical Services	1,143	3.2%	738	2.0%
Educational Services	2,954	8.3%	2,885	7.6%
Health Care and Social Assistance	4,283	12.0%	3,285	8.7%

U. S. Underemployment by Age

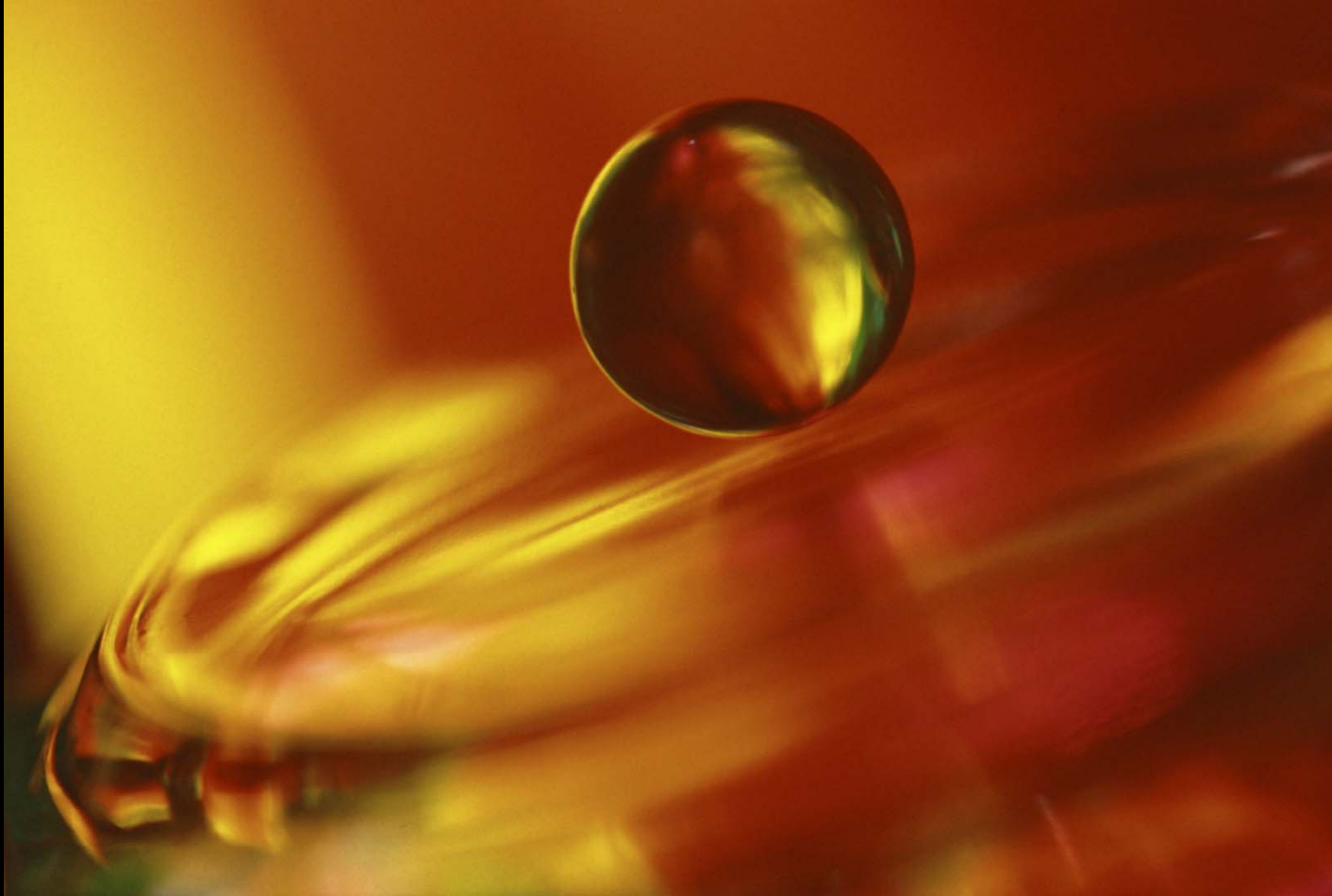


Underemployment by Education

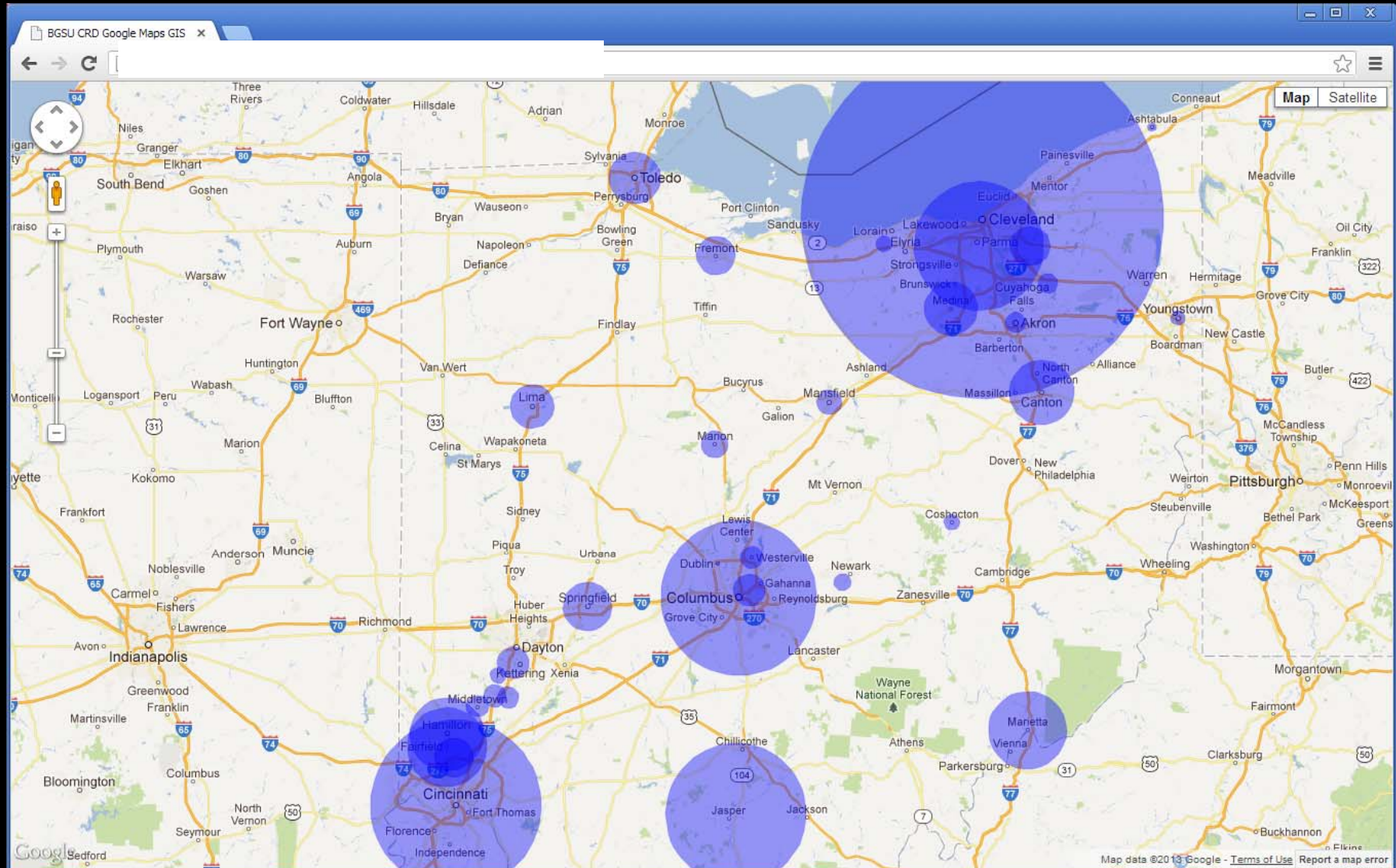


Source: Justin R. Young "Underemployment in Urban and Rural America, 2005-2012"

Economic Contagion



Warn Notice (Mass Layoffs)

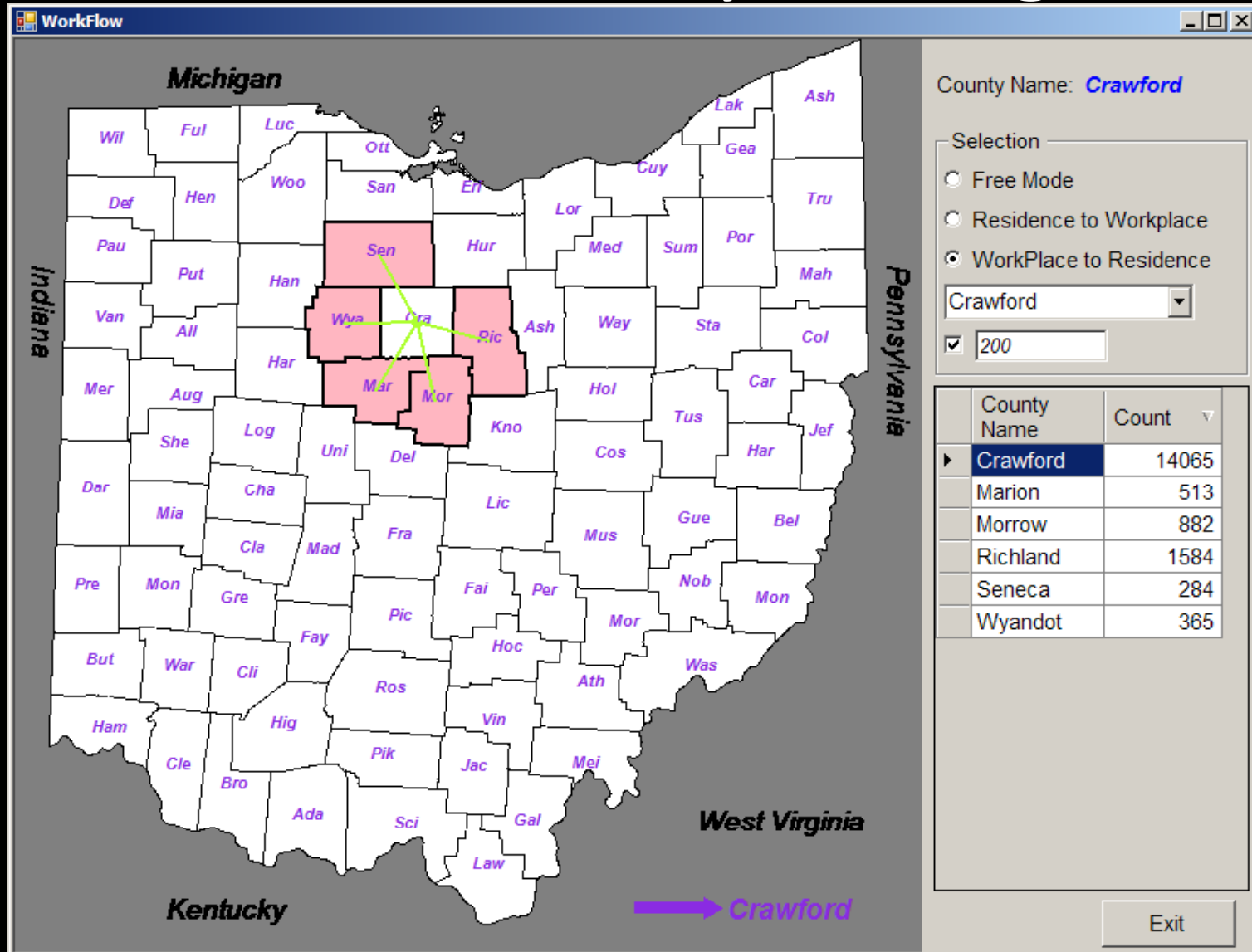


Job Creation 2009-2012

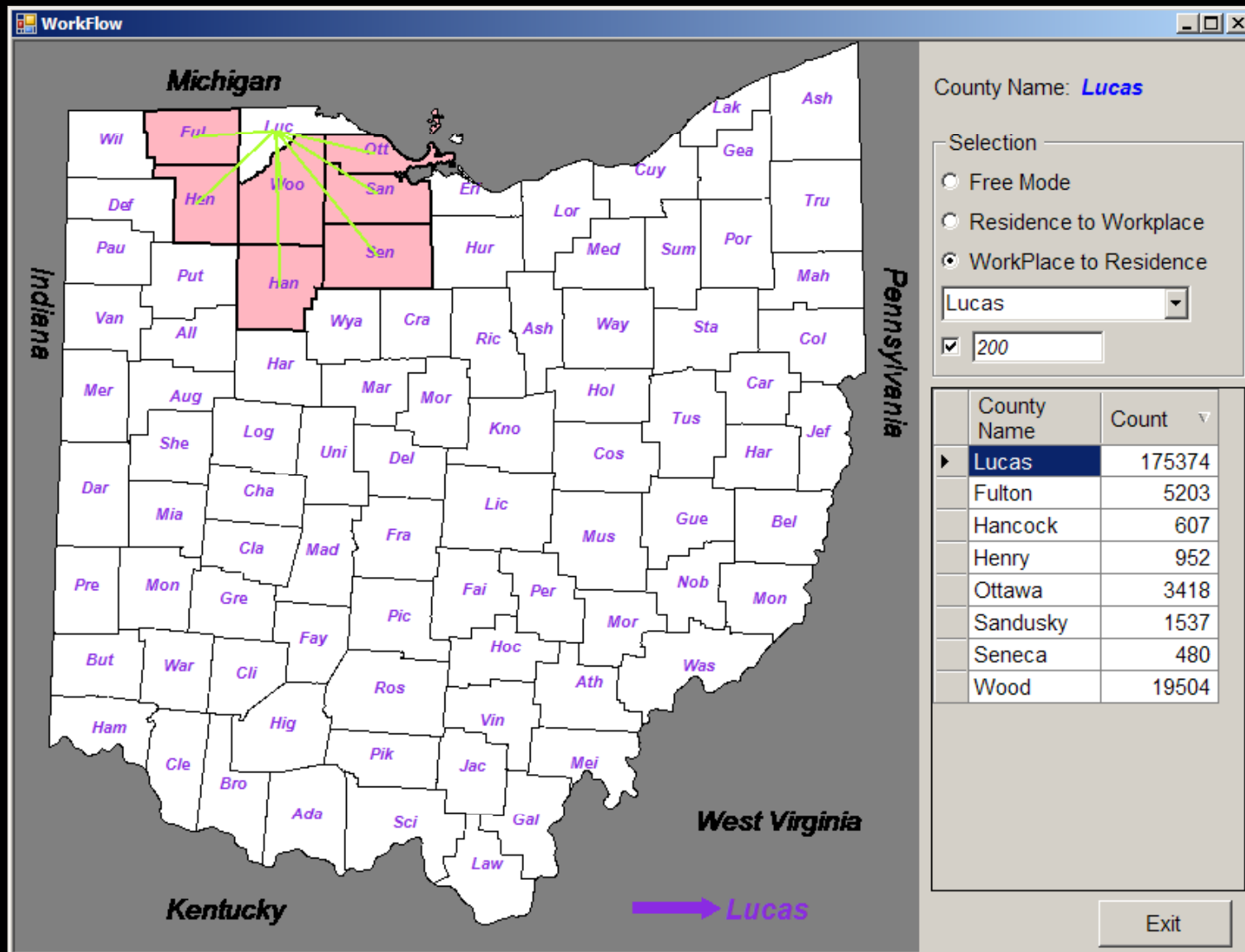
	Created
Allen	600
Crawford	-100
Defiance	-200
Fulton	800
Hancock	1,200
Harden	100
Henry	400
Lucas	-2,600
Ottawa	800

	Created
Paulding	200
Putnam	600
Sandusky	1,000
Seneca	-600
Van Wert	0
Williams	300
Wood	2,100
Wyandot	400
Total	5,000

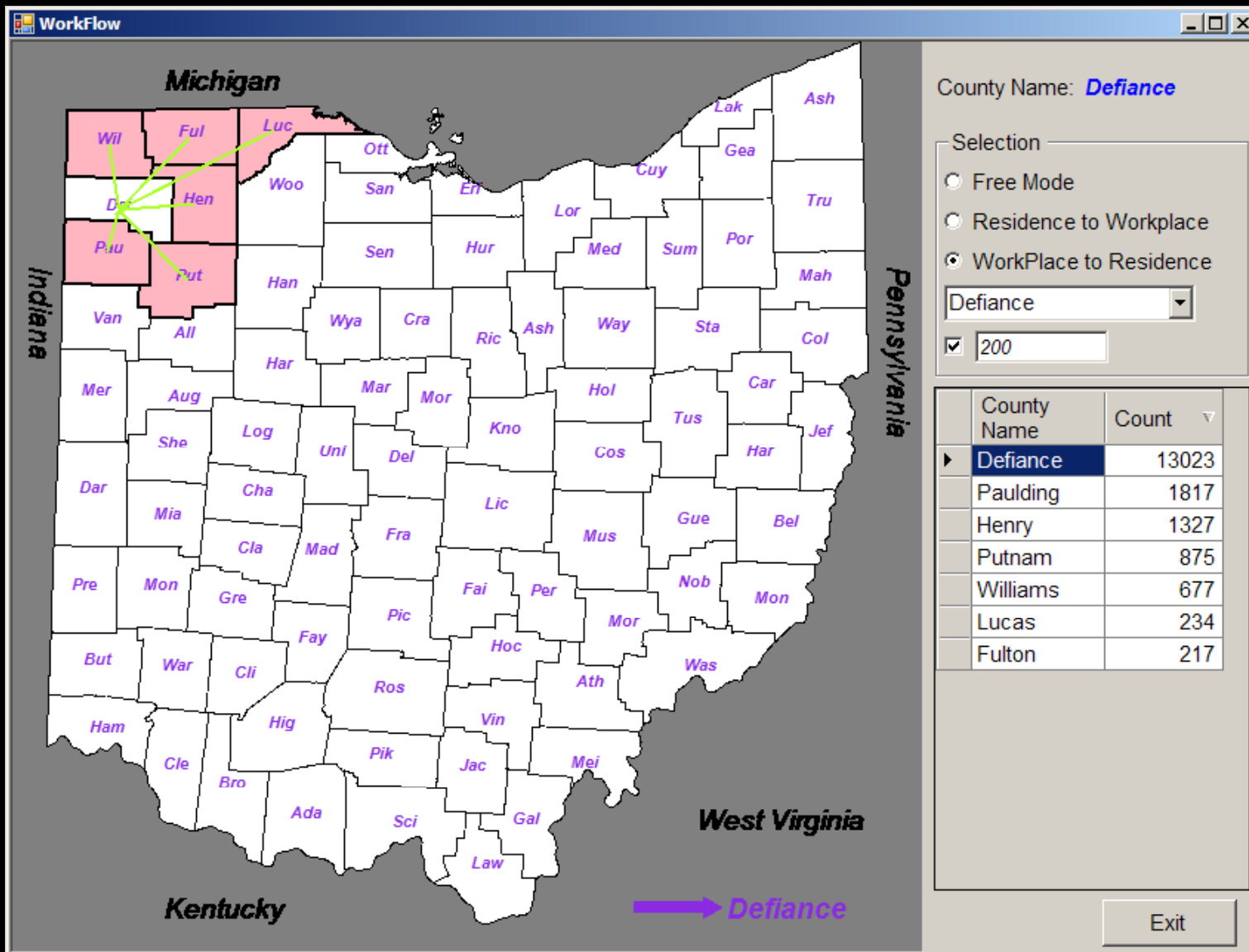
Crawford County Contagion



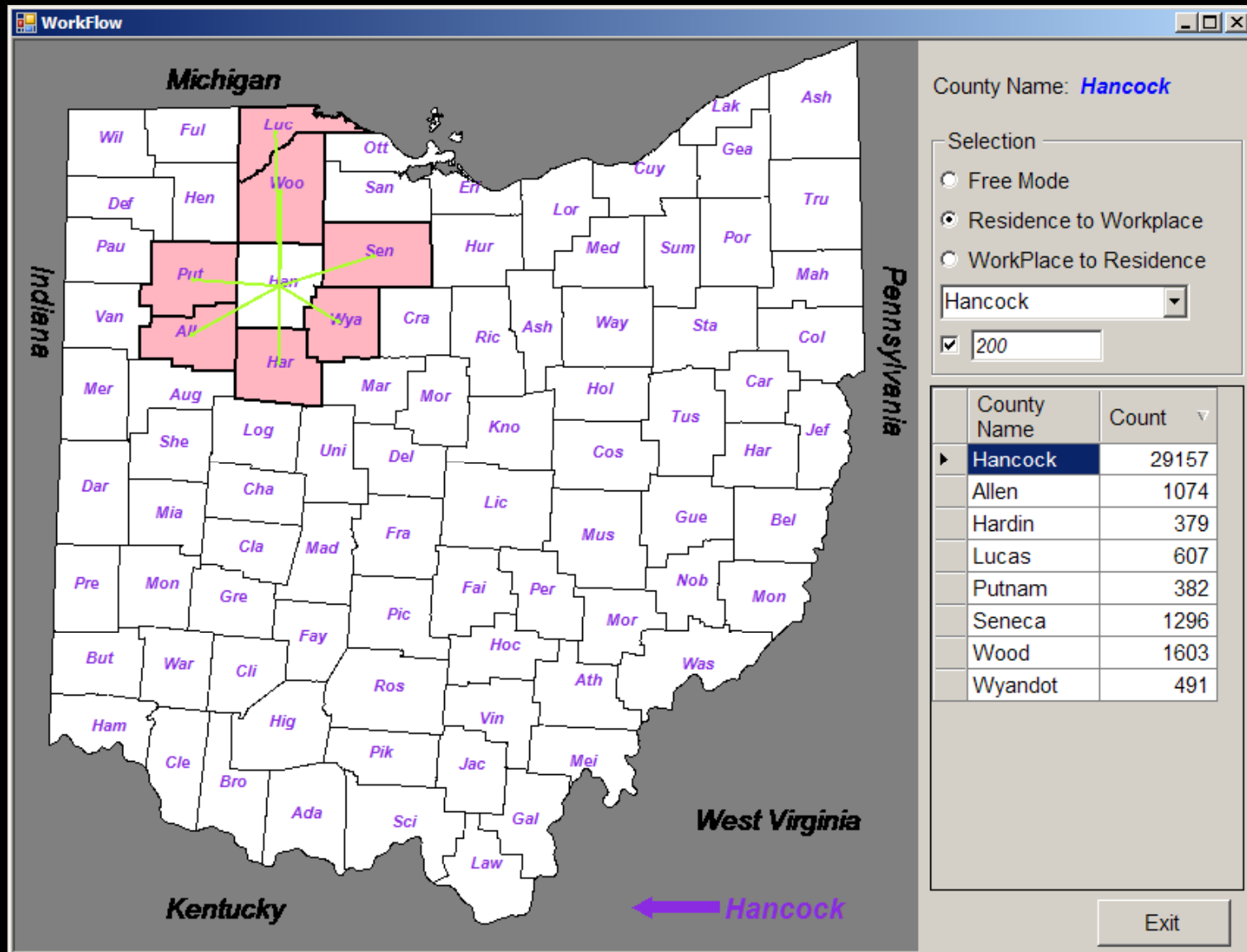
Lucas County Contagion



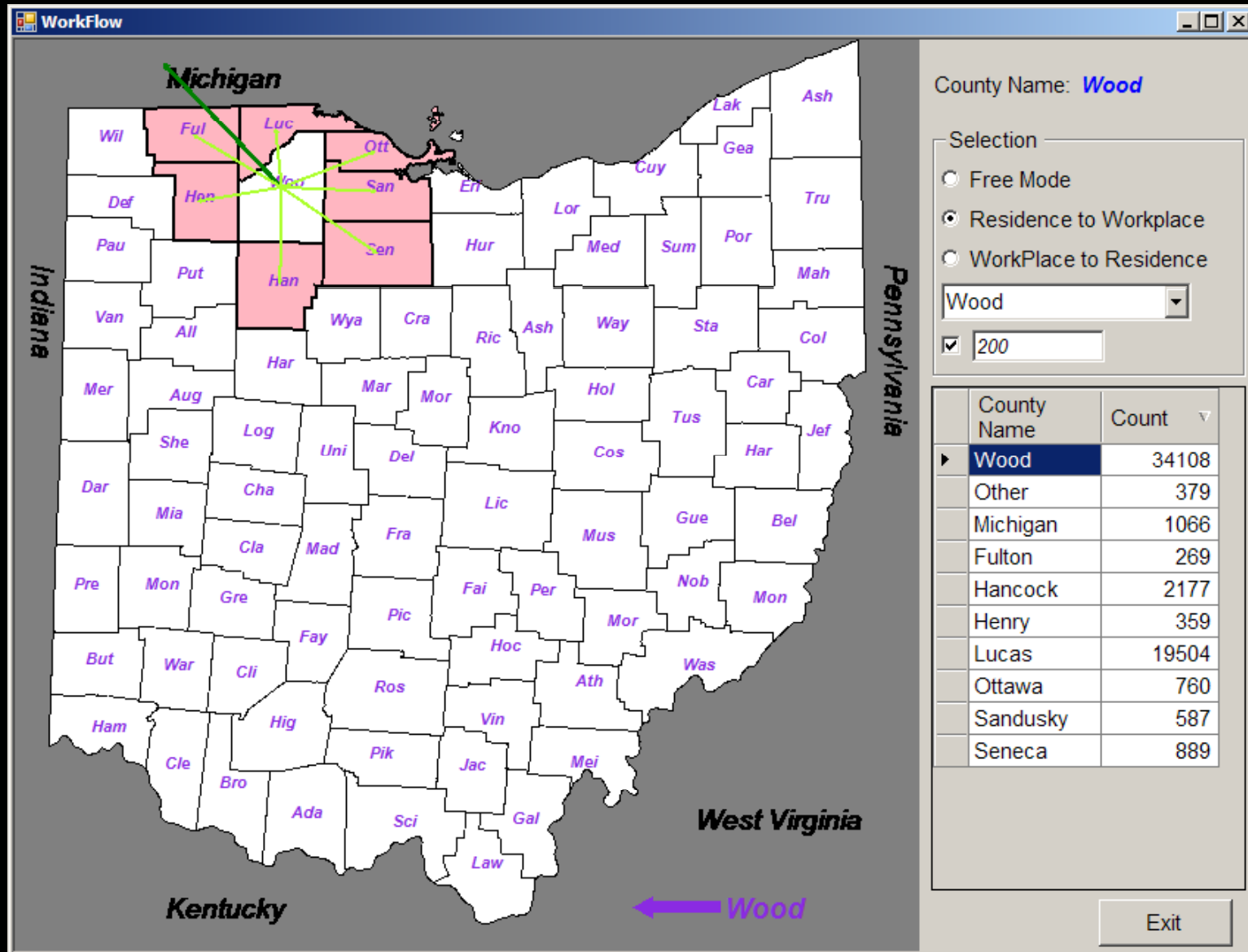
Defiance County Contagion



Hancock County Positive Contagion



Wood County Positive Contagion



A View to the Future

- Concerns:
 - US GDP decline in 4th quarter 2012
 - European decline
 - UK may enter its third recession in five years
 - Washington gridlock
 - Federal Reserve Toolbox

A View to the Future

- Opportunities
 - The worst is over for making a structural change in our regional economy
 - New economy ecosystems
 - New collaborations and a concentration on networked development

Thank
You

Michael C. Carroll
Center for Regional Development

unlucky

CENTER FOR REGIONAL DEVELOPMENT'S
ANNUAL STATE OF THE REGION CONFERENCE

BGSU.