

Benchmarking Central Ohio 2011 Overview and Highlights

November 2011

About the project

Benchmarking Central Ohio 2011 compares the eight-county Columbus metropolitan area¹ to 15 other metros² using a panel of 76 diverse indicators. The indicators focus on five broad areas—population vitality, economic strength, personal prosperity, community wellbeing, and lifelong learning—each of which describes a facet of the community that contributes to economic competitiveness. The research was jointly funded by The Columbus Foundation, a charitable organization whose mission is to assist donors and others in strengthening and improving the community for the benefit of all central Ohio residents, and The Columbus Partnership, a CEO organization of 30 top business and community leaders in central Ohio whose mission is to improve the economy of central Ohio and be a catalyst for growth in the region. The report was prepared by Community Research Partners (CRP), a nonprofit research center that strengthens Ohio communities through data, information, and knowledge.

The 2011 *Benchmarking* report, fourth in the *Benchmarking Central Ohio* series, affirms or clarifies many of the baseline measurements of the first three reports. This report provides the latest data available and continues to build the foundation for tracking trends in the future. Because there was an intervening year between this report and the 2009 report, CRP has gathered archived data wherever possible to fill in trend data for the missing year.

Changes in the 2011 report are greater in number than in previous years, which in part reflects an approach toward a broader scope in benchmarking. Changes in the 2011 report include:

- **New indicators:** CRP considered a wide range of potential new indicators, specifically on the topics of energy, health, child wellbeing, education, and gender equality. Compared to the addition of one new indicator to the 2009 report, the 2011 report contains 18 new indicators. Where possible, CRP gathered archived data for the new indicators to provide trending comparable to the established indicators.
- **Revised indicators:** Four of the existing primary indicators were modified for various reasons. The Earned Income Tax Credit, Charitable Contributions, and Traffic Congestion indicators were revised due to changes in the way their sources reported the data, while the Libraries indicator was changed due to concerns about the relevance of the data. A summary table of changes is included in Appendix A.
- **A new education section:** Called *Lifelong Learning*, this section includes five new indicators as well as four existing indicators from other sections in the 2009 report.

¹ Delaware, Fairfield, Franklin, Licking, Madison, Morrow, Pickaway, Union counties

² Austin, Charlotte, Chicago, Cincinnati, Cleveland, Indianapolis, Jacksonville, Kansas City, Louisville, Milwaukee, Minneapolis, Nashville, Portland OR, Raleigh, San Diego

- **Dropped indicators:** The Wi-Fi Hotspots and Home Internet Use indicators from previous reports were removed due to the ubiquity of public Wi-Fi hotspots and greater Internet access in general. The Venture Capital Investment indicator was dropped due to its use of congressional districts for reporting, which do not align with census MSA geographies.
- **Data source changes:** The data source for the Local Government indicator was changed from *Demographia* magazine to the Census Bureau's Census of Local Governments, which had been the raw data source for *Demographia*.
- **Online data resource for the top 100 metro areas:** In addition to this report, CRP has provided Benchmarking indicators data in an online resource for all of the top 100 Metropolitan Statistical Areas by population (including Columbus and the 15 other Benchmarking MSAs) to enable users to do their own benchmarking comparisons:
www.researchpartners.org/uploads/publications//Benchmarking2011_Top100.xls

The full *Benchmarking Central Ohio 2011* report can be downloaded from the Columbus Partnership website, www.columbuspartnership.com, or from the Community Research Partners website, www.communityresearchpartners.org. For more information about the project, contact The Columbus Partnership at 614-225-0500 or CRP at 614-224-5917, ext. 100.

The Columbus Metro Area Profile³

1. Population Vitality

Indicators of population growth, racial and ethnic diversity, and age diversity

Compared to the other 15 *Benchmarking* metros, Columbus had moderate population growth, a younger population, less racial and ethnic diversity, and more new immigrants.

- **Moderate population growth:** The Columbus metro area ranked 9th among the 16 metros in both population growth and birth rate.
- **A younger population:** Columbus was the 3rd youngest in median age and 4th lowest in persons age 65+.
- **Less racial and ethnic diversity overall, but many new immigrants:** Columbus ranked 10th in percent foreign born, 13th in percent minority population, and 10th most residentially integrated by race but 3rd in percent of *new* foreign-born residents (those who entered the U.S. in 2000 or after).

³ In most cases, a #1 ranking indicates both "highest" and "best," and a #16 ranking indicates both "lowest" and "worst." For some indicators (e.g. unemployment, poverty, crime), the lowest number is best. In these cases, data are ranked with the lowest number as #1 and the highest number as #16.

2. Economic Strength

Indicators of industry and occupation distribution, business and employment growth, investment, productivity, and the workforce

The Columbus metro area's economic strength indicators present an overall positive picture of the region, with approximately equal numbers of top- and middle-tier rankings and few bottom-tier rankings.

Columbus Top-Tier Rankings (Rank 1-5):

- **Job distribution:** Columbus had high concentrations of employment in the government (#4); professional and business services (#3); financial activities (#4); and transportation, warehousing, and utilities (#4) sectors.
- **Job growth:** The Columbus metro outpaced the other 15 *Benchmarking* metros (#1) in employment increase in the transportation, warehousing and utilities sector.
- **Large companies:** Columbus ranked 4th in the number of Fortune 1,000 companies.
- **Occupations:** Columbus ranked in the top tier in percent management, professional, and related occupations (#5) and IT occupations (#3).
- **Business Ownership:** Columbus ranked 2nd in percent of businesses owned by women.
- **Workforce:** Columbus ranks in the top tier in percent population of prime working age (22-54 years; #3) and percent population age 25-34 (#2).
- **Unemployment:** Columbus had a relatively low unemployment rate (3rd lowest).

Columbus Bottom-Tier Rankings (Rank 12-16):

- **Job distribution:** Columbus had low concentrations of employment in the education and health services (#11), manufacturing (#13), and leisure and hospitality (#11) sectors.
- **Job growth/loss:** Columbus ranked near the bottom in job change in the manufacturing (#13), retail trade (#16), and financial activities (#15) sectors.
- **Occupations:** Columbus ranked 16th in percent employment in construction, extraction, maintenance, and repair jobs.
- **Employer business firms:** Columbus had a low ranking in employment change in all business firms (#13) and change in the number of business firms (#13).
- **Small businesses:** Columbus ranked 13th in "births" of small businesses and 12th in birth-to-death ratio of small business (fewer than 20 employees).
- **Brain gain:** Columbus ranked 13th in percent of new residents 25 and older with a bachelor's degree.

3. Personal Prosperity

Indicators of personal income, economic hardship, homeownership and housing affordability, and economic equity.

The Columbus metro area's personal prosperity indicators were mostly in the bottom half of the rankings, with fewer top-tier than bottom-tier rankings.

Columbus Top-tier Rankings (Rank 1-5):

- **Income gap:** Columbus had a smaller gap between the top and bottom income groups (#5) than many of the other metros.
- **Gender equality:** Columbus ranked 4th in women's median income as a percentage of men's.

- **Housing affordability:** Columbus ranked 4th in both owner and rental housing affordability.

Columbus Bottom-tier Rankings (Rank 12-16):

- **Income:** Columbus ranked low in median household income (#12) and investment income as a percent of personal income (#15).
- **Poverty and public assistance:** Columbus ranked at the bottom in persons below the poverty level (#16) and near the bottom in persons receiving public assistance (#13).
- **Housing:** Columbus ranked 12th in both home foreclosures and homeownership.
- **Parental employment:** Columbus ranked at the bottom with the highest percent of children under 18 living in families where no parent works (#16).

4. Community Wellbeing

Indicators of health, safety, civic life, transportation, environmental quality, and cultural and leisure activities.

The Columbus metro area's community wellbeing indicator rankings were spread across the board, with more indicators in the middle tier (rank 6-11) than in either the top or bottom tier.

Columbus Top-tier Rankings (Rank 1-5):

- **Local foods:** Columbus ranked 2nd in percent of land area in agriculture.
- **Asthma and air quality:** Columbus was 2nd lowest in percent of adults with asthma and 5th highest in percent of days with good air quality.
- **Violent crime:** Columbus had a relatively low violent crime rate (#5).
- **Volunteering:** Columbus had a relatively high rates of volunteering (#4) and volunteer retention (#2) and a high number of annual volunteer hours, on average (#3).
- **Commute times:** Columbus had fewer workers who commute 25+ minutes (#2), the 3rd shortest commute times by car, the 5th shortest commute times by public transit, and the lowest number of hours of traffic delay per person (#1).
- **Community celebrations:** Columbus ranked at the top in number of nonprofit community celebrations per million people (#1).

Columbus Bottom-tier Rankings (Rank 12-16):

- **Obesity and diabetes:** Columbus ranked near the bottom in percent of adults who are obese (#14) and adults with diabetes (#14).
- **Charitable contributions:** Columbus ranked low in amount of charitable contributions per tax return (#15).
- **Local government:** Columbus ranked 12th in percent of major public officials who are women and 14th in the number of local government units per 100,000 population.
- **Infrastructure:** Columbus ranked 13th in number of highway bridges rated structurally deficient.
- **Public transit usage:** Columbus ranked low in public transportation passenger miles (#12).
- **Traffic congestion:** Columbus ranked 13th in change in traffic delay per person.
- **Commute transportation mode:** Columbus ranked 15th in percent of commuters driving alone and at the bottom in carpooling as a means to commute to work (#16).
- **Airports:** Columbus ranked low in commercial air passenger boardings per capita (#15).

- **Arts establishments:** Columbus ranked toward the bottom (#13) in the number of arts establishments per capita.
- **Energy use:** Columbus ranked low for carbon footprint from transportation (#12) and had the highest carbon emissions per capita from residential heating fuels (#16).

5. Lifelong Learning

Indicators of literacy and language, attendance and enrollment, educational attainment, and school nutrition.

The Columbus metro area's lifelong learning indicators fell mostly in the top half of the rankings, with none of the primary indicators in the bottom tier.

Columbus Top-tier Rankings (Rank 1-5):

- **English language ability:** Columbus had a low percent of the population age 5 and over speaking English less than "very well" (#4).
- **High school attendance:** Columbus had a low high school drop-out rate with a small percent of 16-19 year olds not enrolled school and not high school graduates (status drop-out rate; #2), and a lower percentage of "idle teens", defined as 16-19 year olds not enrolled in school and not working (#3).
- **Higher education enrollment:** Columbus ranks 4th in 18-24 year olds enrolled in higher education.
- **Educational attainment:** Columbus has the 5th highest percent of the population 25 and over with a bachelor's degree and the 4th lowest percent without a high school diploma.
- **School nutrition assistance:** Columbus has a relatively low percent of students K-12 eligible for free or reduced lunch (#3).
- **Libraries:** Columbus ranked 2nd in public library visits per capita.
- **Research universities:** Columbus ranked 3rd in number of research doctoral degrees awarded per 100,000 people.

Columbus Bottom-tier Rankings (Rank 12-16):

- **Educational attainment:** Columbus ranked 13th in the percent of the population 25 and over with only a high school diploma.

Columbus 3-Year Trends

One objective of the Benchmarking project is to monitor how Columbus performs against other metropolitan areas over time.

The following table provides an overview of Columbus ranking trends. For most of the indicator groupings the trends are mixed, with some rankings going up and some going down. However, the Economic Strength and Personal Prosperity indicators show a clear upward trend, with more indicator rankings moving up than down.

Indicator Grouping	Number of Indicators with:			
	Rank going up	Rank going down	Mixed movement	No change
Population Vitality	3	1	3	1
Economic Strength	7	1	6	3
Personal Prosperity	5	0	7	4
Community Wellbeing	2	7	7	5
Lifelong Learning	1	3	2	1

Seven indicators are not included because data is only available for one year. See report for methodology used to determine trends and trends by indicator.

How the Indicators Reflect Current Economic Conditions

In the 2011 *Benchmarking* report, a number of the business and housing indicators reflect decline in economic conditions across all 16 metro areas, mirroring current affairs in the national economy. Some of the data in the report, while the latest available, describe conditions as they were 2-3 years ago, reflecting that current economic difficulties in some cases had their beginnings several years ago. These economic conditions are evident in the current report in the following indicators:

- 15 metro areas had a net loss of business firms, compared to six metros in the 2009 report
- All metro areas had increased unemployment rates
- All metro areas had an increase in poverty rate
- All metros had increased foreclosure rates
- All metros had a drop in residential building permits
- Owner housing became more affordable across all metro areas