



## Benchmarking Central Ohio 2008 Overview and Highlights

April 2008

### About the project

*Benchmarking Central Ohio 2008* assesses how the 8-county Columbus metropolitan area<sup>1</sup> is doing, in comparison to 15 other metro areas<sup>2</sup>, using a panel of 60 diverse indicators. The indicators focus on four broad areas—population vitality, economic strength, personal prosperity, and community well-being—each of which describes a facet of the community that contributes to economic competitiveness. The research was commissioned by 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.

*Benchmarking 2008* represents the second year of the project. Although two years do not represent a definitive trend, this report provides the latest data available and builds the foundation for tracking trends over time. An objective of the 2008 report was to keep the content and format as stable as possible to allow comparisons with the 2007 data; however, some changes were made based on feedback from the Benchmarking Advisory Group and data availability. The following are new in the 2008 report:

- **Patterns across Indicators:** This matrix at the beginning of each section lines up the metro areas based on their ranking on a key indicator and shows other indicators that have similar rankings to that key indicator. For example: What is the profile of high growth metro areas, compared to slow growth metro areas?
- **Columbus trend chart:** For indicators where two years of data are available, a new Columbus Trend chart has been added to the indicator page.
- **National context data:** Each of the indicator bar graphs now has a new bar to show the data for the U.S., all metro areas, or other relevant basis of comparison.
- **New and revised indicators:** There have been selective indicator changes (some additions, deletions, and modifications). These are explained in Appendix A.
- **Data source changes:** There are some changes in data definitions, methodologies, and sources that may impact comparisons between the 2007 and 2008 reports. These are explained in the indicator definition and Appendix A.

The full *Benchmarking Central Ohio 2008* report can be downloaded from the Columbus Partnership website, [www.columbuspartnership.com](http://www.columbuspartnership.com), or from the Community Research Partners website, [www.communityresearchpartners.org](http://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.

---

<sup>1</sup> Delaware, Fairfield, Franklin, Licking, Madison, Morrow, Pickaway, Union counties

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

## The Columbus Metro Area Profile<sup>3</sup>

### 1. Population Vitality

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

Compared to the other metros, Columbus had moderate population growth, a young population, and less racial and ethnic diversity.

- **Moderate population growth:** The Columbus metro area population growth ranked 9<sup>th</sup> among the 16 metros.
- **A younger population:** Columbus was the 4<sup>th</sup> youngest in median age and 5<sup>th</sup> lowest in persons age 65+.
- **Less racial and ethnic diversity:** Columbus ranked 11<sup>th</sup> in percent foreign born and percent minority population; but 3<sup>rd</sup> in percent of *new* foreign-born residents (those who entered the U.S. in 2000 or after).

### 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 showed a mixed picture, with approximately equal numbers of top and middle tier rankings, and several bottom tier rankings.

#### **Columbus Top Tier Rankings (rank 1-5):**

- **Job distribution:** Columbus had high concentrations of employment in the government (#3); professional and business services (#4); retail trade (#4); financial activities (#4); and transportation, warehousing, and utilities (#4) sectors.
- **Job growth:** The Columbus metro far outpaced all other metros (#1) in employment increase in the transportation, warehousing and utilities sector.
- **Large companies:** Columbus ranked 4<sup>th</sup> in the number of Fortune 1,000 companies.
- **Workforce:** Columbus ranks in the top tier in higher education enrollment (#4), persons of prime working age (#5), and new residents with a graduate degree (#3).

#### **Columbus Bottom Tier Rankings (rank 12-16):**

- **Job growth/loss:** Columbus ranked near the bottom in job change in the manufacturing (#12), retail trade (#15), and financial activities (#14) sectors.
- **Number of businesses:** Columbus ranked near the bottom (#13) in change in number of business firms (#13).
- **Very small businesses:** Columbus ranked last (#16) in the percent of very small businesses (fewer than 20 employees), and 13<sup>th</sup> in "births" of very small businesses.

---

<sup>3</sup> 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.

### 3. Personal Prosperity

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

The Columbus metro area's personal prosperity indicators nearly all fell in the bottom half of the rankings, with only two top tier rankings among the 17 indicators, and 9 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.
- **Housing affordability:** Columbus ranked 3<sup>rd</sup> in owner housing affordability.

#### **Columbus Bottom Tier Rankings (rank 12-16):**

- **Income:** Columbus ranked low in median household income (#12), households with incomes above \$75,000 (#12), and investment income as a percent of personal income (#15).
- **Poverty and public assistance:** Columbus ranked near the bottom in persons below the poverty level (#15) and persons receiving public assistance (#13).
- **Housing:** Columbus had a low ranking in home foreclosures (#13), owner-occupied housing (#12), and residential building permits (#13).
- **Pre-K enrollment:** Columbus ranked 13<sup>th</sup> in 3- and 4-year olds enrolled in school.

### 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 no large groupings in any of the tiers.

#### **Columbus Top Tier Rankings (rank 1-5):**

- **Health insurance:** Columbus had a low percentage of adults without health insurance (#3).
- **Commute times:** Columbus had fewer workers who commute 25+ minutes (#2).
- **Libraries and sports:** Columbus ranked 2<sup>nd</sup> in library circulation and 4<sup>th</sup> in the number of professional sports teams.
- **Air quality:** Columbus had a high ranking in unhealthy air quality days (#3).

#### **Columbus Bottom Tier Rankings (rank 12-16):**

- **Obesity:** Columbus ranked in the bottom tier in adults who are obese (#13).
- **Public transit usage:** Columbus ranked at the bottom (#16) in change in public transit usage.
- **Wi-Fi:** Columbus had a low ranking (#13) in the number of Wi-Fi hot spots.
- **Arts establishments:** Columbus ranked at the bottom (16<sup>th</sup>) in number of arts establishments.
- **Local government:** Columbus ranked in the bottom tier (#12) in the number of local government units.

## Columbus 2-Year Trends

A comparison of the 2007 and 2008 Benchmarking reports found that the Columbus metro area rankings changed most (3 or more spots) for the indicators in the table below. For the indicators related to income, new housing starts, rental housing affordability, and households without a vehicle, the rankings worsened between 2007 and 2008. The rankings for owner housing affordability, transportation mode, and green buildings improved.

There are, however, caveats with regard to the ranking changes. The first is that two years do not necessarily constitute a trend. In addition, all of the indicators below, with the exception of 3.11 and 4.17, have the 2005 and 2006 Census Bureau's American Community Survey (ACS) as the data source. Changes in the ACS methodology for counting persons in group quarters, such as dormitories, from 2005 to 2006 may account for some of these two-year trends.

Indicator	Rank 2007 Report	Rank 2008 Report
2.04 Transportation, Utilities, Warehousing Sector Employment	8	4
3.02 Household Income	9	12
3.03 Income \$75,000 and Above	7	12
3.05 Poverty	12	15
3.08 Self-Sufficiency Income	7	12
3.11 New Housing Starts	10	13
3.13 Owner Housing Affordability	7	3
3.15 Rental Housing Affordability	2	9
3.16 Households without a Vehicle	6	9
4.11 Commute Transportation Mode	13	9
4.17 Green Building	13	6

### Patterns Across Indicators

The beginning of each of the four sections of *Benchmarking 2008* has a graphic that lines up the metro areas based on their ranking on one key indicator from that section and shows other indicators with rankings most and least similar to that key indicator. The following tables provide an overview of these Patterns Across Indicators matrices.

**1. How does the Columbus metro area (rank #9) compare to high population growth metros and low population growth metros?**

Highest growth metros	Lowest growth metros
Raleigh (1), Austin (2), Charlotte (3), Jacksonville (4), Nashville (5)	Cincinnati (12), Chicago (13), San Diego (14), Milwaukee (15), Cleveland (16)
<p><b><i>Columbus is similar to highest growth metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low population age 65+</li> <li>• High prime working age population</li> <li>• High transportation, warehousing, and utility sector job growth</li> <li>• Low percent investment income</li> </ul>	<p><b><i>Columbus is similar to lowest growth metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low change in number of business firms</li> <li>• Low small business births</li> <li>• Low residential building permits</li> <li>• High new residents with graduate degrees</li> <li>• High owner housing affordability</li> <li>• Low workers who commute 25+ minutes</li> <li>• High library circulation</li> </ul>
<p><b><i>Other “top tier” characteristics of highest growth metros:</i></b></p> <ul style="list-style-type: none"> <li>• High change in number of business firms</li> <li>• High small business births</li> <li>• High venture capital</li> <li>• High per capita income</li> <li>• Low unemployment rate</li> <li>• High residential building permits</li> <li>• Low households without a vehicle</li> </ul>	

Indicator 1.01: Percent population change, 2001-2006 (Source: U.S. Census Bureau, Population Estimates)

**2. How does the Columbus metro area (rank #7) compare to high Gross Metropolitan Product (GMP) metros and low GMP metros?**

Highest GMP metros	Lowest GMP metros
San Diego (1), Minneapolis (2), Charlotte (3), Austin (4), Chicago (5)	Portland (12), Kansas City (13), Raleigh (14), Cincinnati (15), Louisville (16)
<p><b><i>Columbus is similar to highest GMP metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low population age 65+</li> <li>• Low median age</li> <li>• High college enrollment</li> <li>• Low owner-occupied housing</li> <li>• High foreclosure rate</li> </ul>	<p><b><i>Columbus is similar to lowest GMP metros in:</i></b></p> <ul style="list-style-type: none"> <li>• High persons receiving public assistance</li> <li>• High number of local government units</li> <li>• High transportation, warehousing, and utilities sector job growth</li> <li>• Low income gap ratio</li> <li>• High owner housing affordability</li> <li>• Low adults without health insurance</li> <li>• Low workers who commute 25+ minutes</li> <li>• High library circulation</li> </ul>
<p><b><i>Other “top tier” characteristics of highest GMP metros:</i></b></p> <ul style="list-style-type: none"> <li>• High foreign born population</li> <li>• High minority population</li> <li>• High venture capital investment</li> <li>• High minority business ownership</li> <li>• Low persons receiving public assistance</li> <li>• Low adults who smoke</li> </ul>	

Indicator 2.11: Gross metropolitan product per capita, 2005 (Source: U.S. Conference of Mayors, U.S. Metro Economies, 2007)

**3. How does the Columbus metro area (rank #15) compare to low poverty rate metros and high poverty rate metros?**

Lowest poverty rate metros	Highest poverty rate metros
Minneapolis (1), Raleigh (2), Kansas City (3), Indianapolis (4), Portland (5)	Milwaukee (12), Nashville (13), Austin (14), Columbus (15), Louisville (16)
<p><b><i>Columbus is similar to lowest poverty rate metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low income gap ratio</li> <li>• High percent management and professional occupations</li> </ul>	<p><b><i>Columbus is similar to highest poverty rate metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low persons per household</li> <li>• High persons receiving public assistance</li> <li>• Low Wi-Fi hotspots</li> <li>• Low change in number of business firms</li> <li>• High transportation, warehousing and utilities sector job growth</li> <li>• Higher enrollment in higher education</li> <li>• High owner housing affordability</li> <li>• Low adults without health insurance</li> <li>• High good air quality days</li> </ul>
<p><b><i>Other “top tier” characteristics of lowest poverty metros:</i></b></p> <ul style="list-style-type: none"> <li>• High persons under age 18</li> <li>• High persons per household</li> <li>• High change in number of business firms</li> <li>• High, High Tech Location Quotient</li> <li>• Low persons receiving public assistance</li> <li>• Low tax returns claiming EITC</li> <li>• High tax returns with charitable contributions</li> <li>• High WI-Fi hotspots</li> </ul>	

Indicator 3.05: Percent of population below poverty level, 2006 (Source: American Community Survey, 2006)

**4. How does the Columbus metro area (rank #16) compare to high arts establishments metros and low arts establishments metros?**

Highest arts establishments metros	Lowest arts establishments metros
Nashville (1), Minneapolis (2), Portland (3), Raleigh (4), Austin (5)	Charlotte (12), Jacksonville (13), Cleveland (14), Cincinnati (15), Columbus (16)
<p><b><i>Columbus is similar to highest arts establishments metros in:</i></b></p> <ul style="list-style-type: none"> <li>• High prime working age population</li> <li>• High management and professional occupations</li> <li>• Low owner-occupied housing</li> </ul>	<p><b><i>Columbus is similar to lowest arts establishments metros in:</i></b></p> <ul style="list-style-type: none"> <li>• Low Wi-Fi hotspots</li> <li>• Low change in number of business firms</li> <li>• Low median household income</li> <li>• High foreclosures</li> <li>• High professional and business services sector employment</li> <li>• High transportation, warehousing and utilities sector employment</li> <li>• High transportation, warehousing and utilities sector job growth</li> <li>• High owner housing affordability</li> <li>• Low workers who commute 25+ minutes</li> <li>• High library circulation</li> <li>• High good air quality days</li> </ul>
<p><b><i>Other “top tier” characteristics of highest arts establishments metros:</i></b></p> <ul style="list-style-type: none"> <li>• High foreign born population</li> <li>• High change in number of business firms</li> <li>• High venture capital investment</li> <li>• High, High Tech Location Quotient</li> <li>• High median household income</li> <li>• Low births to teens</li> <li>• Low foreclosure rates</li> <li>• High Wi-Fi hotspots</li> </ul>	

Indicator 4.15: Arts establishments per 1,000 population, 2004 (Source: Urban Institute, Arts and Culture Indicators Project, 2004)