COLUMBUS REGION COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

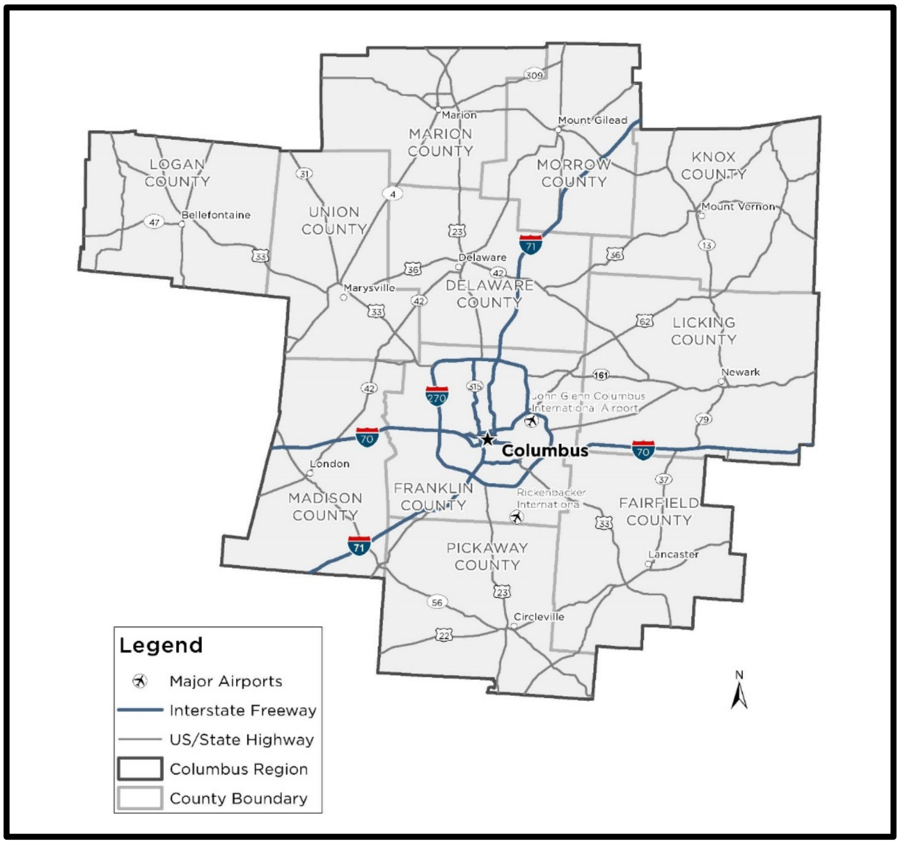
OCTOBER 14, 2021

MID-OHIO REGIONAL
MORPC
PLANNING COMMISSION

INTRODUCTION

The Columbus Region (Region), consisting of the 11 counties of Delaware, Fairfield, Franklin, Knox, Licking, Logan, Madison, Marion, Morrow, Pickaway, and Union, is a metropolitan area located in central Ohio. The City of Columbus, centrally located in the Region, is the state capital and largest city in Ohio, and the 14th largest city in the U.S. The regional economy is diverse and growing as a center for innovation.

FIGURE: Columbus Region



Over the last decade, the Region has experienced strong, consistent growth supported by a shared commitment to region-wide prosperity. One Columbus, the region's economic development organization, and JobsOhio have led these successes for over a decade. The Mid-Ohio Regional Planning Commission (MORPC) is the Region's regional council for more than 70 members comprised of counties, cities, villages, townships, and regional organizations. Working with One Columbus, the region's economic development leader, and more than 30 other regional partners, MORPC has updated the Columbus Region Comprehensive Economic Development Strategy (CEDS) to support the region's commitment to sustained prosperity.

CEDS Update Process

The CEDS update was collaboratively led by the CEDS Strategy Committee, a group of regional economic and community development leaders. The roster is as follows:

Columbus Region CEDS Strategy Committee		
Name	Title	Organization
Corey Alton	Vice President, Commercial Loans	Park National Bank
Michael Augenstein	Director of Workforce Solutions	Marion Technical College
Mark Barbash	Director, Ohio Economic Development Institute	Ohio Economic Development Association
Darnita Bradley	Local Government Affairs and Engagement Manager	JobsOhio
Gus Comstock	Director	Marion CAN DO!
Scott Cubberly	Senior Brokerage Advisor	Equity
Zachary Dowley	Economic Development Specialist	Delaware County Economic Development
Kristen Easterday	Director of Communications & Public Affairs	Columbus Regional Airport Authority
Brad Ebersole	Economic Development Executive	Consolidated Cooperative, Inc.
Terry Foegler	Chief Development Officer	Central Ohio Transit Authority
Kelly Fuller	Workforce Development Director	Columbus Chamber of Commerce
Jeff Gottke	President	Area Development Foundation, Inc.
Cheryl Hay	Executive Director, Office of Talent Strategy	Columbus State Community College
Frank Hickman	Founder	Whetsone Business Consulting
Matt Hill	Technical Study Director	Licking County Area Transportation Study
Patty Huddle	Vice President	Columbus-Franklin County Finance Authority
Brian Huprich	Chief Financial Officer	Ariel Corporation
David Kell	Executive Director	Madison County Chamber of Commerce
Jim Lenner	Village Manager	Village of Johnstown
Michael Linton	Board Chair	South Central Ohio Workforce Partnership
Kenny McDonald	President and Chief Economic Officer	One Columbus
Alicia Oddi	Managing Director	Rev1 Ventures
Eddie Pauline	Director, Economic Development	The Ohio State University

Columbus Region CEDS Strategy Committee		
Name	**Title**	**Organization**
Eric Phillips	Executive Director	Union County - Marysville Economic Development
Jeff Polesovsky	Vice President, Public Policy	Columbus Partnership
Ryan Scribner	Executive Director	Pickaway Progress Partnership (P3)
Chance Shannan	Associate Director of Business Solutions	Workforce Development Board of Central Ohio
Jason Stanford	Vice President	Union County Community Improvement Corporation
Matt Staugler	Director of Business Development	Small Nation
Rick Szabrak	Director of Economic and Workforce Development	Fairfield County
Emanuel Torres	Assistant Director	Franklin County Economic Development & Planning
Ben Vollrath	President	Logan County Chamber of Commerce
Andy Ware	Development Director	Morrow County
Jeff Wilkins	Director of Administration	Solid Waste Authority of Central Ohio

MORPC engaged regional stakeholders in a variety of ways throughout the CEDS process. The Strategy Committee held meetings during the spring and summer of 2021 to guide the CEDS process and identify strategic priorities. MORPC staff presented the CEDS to relevant groups across the region, including economic development leaders, private sector representatives, and local governments.

Finally, a 30-day public comment period allowed for input from across the region. During this period, the CEDS was presented to several regional audiences, including MORPC's Community Advisory Committee, Transportation Advisory Committee, Board of Commissioners and Executive Committee, the Mid-Ohio Development Exchange (MODE), and Central Ohio Rural Planning Organization (CORPO) subcommittees for the counties of Knox, Madison, Fairfield, Morrow, and Union, among others.

Implementation

The Region is projected to continue its significant population growth, necessitating close alignment among regional plans. The Columbus Region CEDS can ensure that stakeholders are coordinating strategic plans and investments for a maximum impact on regional priority areas. The CEDS identifies key partners and strategies to reinforce shared goals.

MORPC will prepare annual reports on the implementation of the CEDS, allowing regional partners to adapt to changing needs and priorities. The CEDS will also support regional proposals for grant funding, improving the region's competitiveness for key funding streams to support economic development.

SECTION 1: SUMMARY BACKGROUND

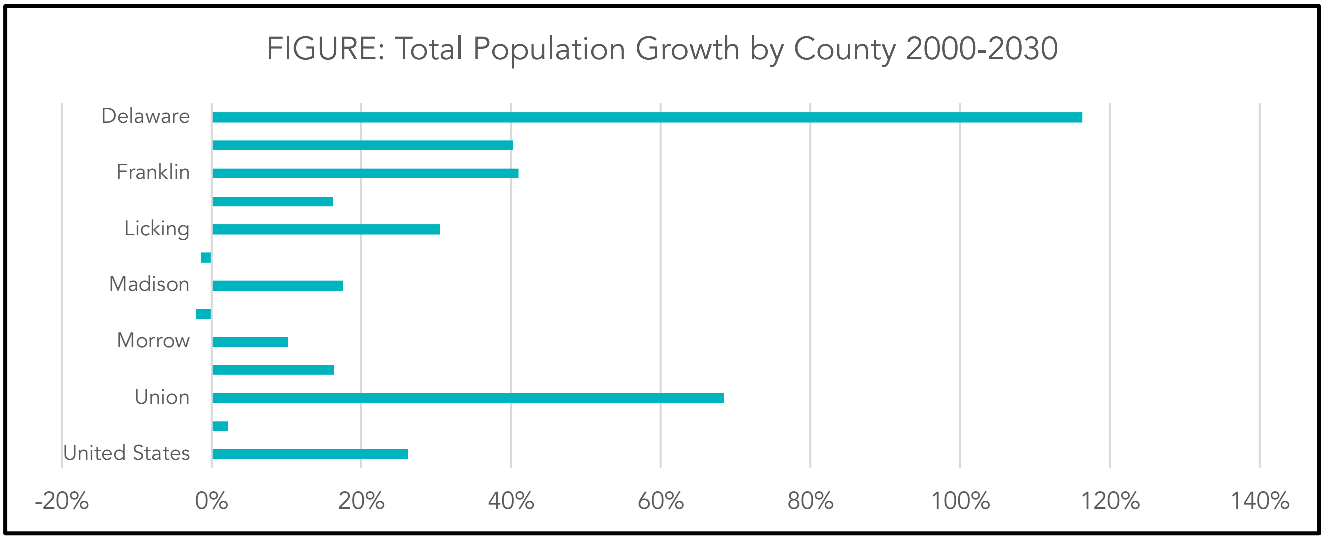
Population and Demographic Background

Since 2010, the Region has experienced strong, consistent demographic and economic growth. The Region is attractive both to businesses and residents—evidenced by a decade (2010-2020) with its strongest-ever annual average population growth. The Columbus region is one of the fastest growing in the Midwest. Notably, the Region's growth from 2000-2030 is projected to outpace the State of Ohio and the nation.

FIGURE: Total Population with Projections by County

Geography	2000	2010	2020	2030	% Growth 2000-2030
Delaware	111,759	175,116	211,050	241,709	116.3%
Fairfield	123,485	146,396	159,980	173,169	40.2%
Franklin	1,072,018	1,166,274	1,348,203	1,511,680	41.0%
Knox	54,616	61,092	61,999	63,483	16.2%
Licking	146,268	166,713	177,622	190,913	30.5%
Logan	45,984	45,749	45,364	45,351	-1.4%
Madison	40,218	43,434	44,938	47,295	17.6%
Marion	66,135	66,455	64,754	64,740	-2.1%
Morrow	31,813	34,791	35,018	35,073	10.2%
Pickaway	52,808	55,733	58,652	61,476	16.4%
Union	41,338	52,389	60,415	69,596	68.4%
TOTAL	1,786,442	2,014,142	2,267,994	2,504,484	40.2%
Ohio	11,363,844	11,536,504	11,574,870	11,615,100	2.2%
United States	281,421,906	308,745,538	332,639,000	355,101,000	26.2%

Source: Mid-Ohio Regional Planning Commission Population Projections



The Columbus Region is relatively young compared to U.S. averages, with a share of working-age (18-64) population 1.9% above the U.S. average. This difference is projected to become even greater. While the Region's share of working-age population is projected to decrease by 0.7% by 2050, the national share is projected to decrease by 3.1%. These trends indicate a region facing an aging population, but one with an increasing competitive advantage in population demographics.

FIGURE: Population by Age Projection

Geography	Age Group	2020	2020 % of Total	2050	2050 % of Total	Change 2020-2050
Columbus Region	Population Ages under 18	529,601	23.4%	657,082	23.2%	24.1%
Columbus Region	Population Ages 18 - 64	1,425,164	62.8%	1,760,530	62.1%	23.5%
Columbus Region	Population Ages 65 and older	313,229	13.8%	417,688	14.7%	33.3%
TOTAL		2,267,994		2,835,300		25.0%

Geography	Age Group	2020	2020 % of Total	2050	2050 % of Total	Change 2020-2050
United States	Population Ages under 18	73,967,000	22.2%	78,225,000	20.1%	5.8%
United States	Population Ages 18 - 64	202,621,000	60.9%	225,023,000	57.9%	11.1%
United States	Population Ages 65 and older	56,052,000	16.9%	85,675,000	22.0%	52.8%
TOTAL		332,640,000		388,923,000		16.9%

Source: United States Census Population Projections

The Region's racial and ethnic demographics are also changing, with nonwhite residents contributing the greatest share of population growth. From 2010-2019, the share of nonwhite residents in the region increased by 4.52 percentage points.

FIGURE: Population by Race/Ethnicity						
Race / Ethnicity	2010 Estimate	2010 % of Total	2019 Estimate	2019 % of Total	Change 2010-2019	% Change 2010-2019
American Indian and Alaska Native	3,066	0.16%	3,105	0.14%	39	1.3%
Asian	55,305	2.81%	88,813	4.06%	33,508	60.6%
Black or African American	265,566	13.47%	323,027	14.78%	57,461	21.6%
Hispanic or Latino	62,790	3.19%	89,893	4.11%	27,103	43.2%
Native Hawaiian and Other Pacific Islander	393	0.02%	645	0.03%	252	64.1%
Some other race	2,794	0.14%	4,672	0.21%	1,878	67.2%
Two or more races	40,929	2.08%	66,260	3.03%	25,331	61.9%
White	1,540,271	78.14%	1,609,030	73.62%	68,759	4.5%
TOTAL	1,971,114	100.00%	2,185,445	100.00%	214,331	

Source: American Community Survey

The Columbus Region's racial demographic changes largely mirror the U.S. averages, but with greater growth among people of color. The 4.52 percentage point share of growth from 2010-2019 compares to 2.72 percentage points at the state level and 3.97 percentage points nationally.

FIGURE: Population by Race/Ethnicity vs. Ohio and United States			
Race/Ethnicity	Region	State	United States
American Indian and Alaska Native	-0.01%	-0.02%	-0.01%
Asian	1.26%	0.59%	0.84%
Black or African American	1.31%	0.27%	0.10%
Hispanic or Latino	0.93%	0.91%	2.31%
Native Hawaiian and Other Pacific Islander	0.01%	0.01%	0.02%
Some other race	0.07%	0.03%	0.02%
Two or more races	0.96%	0.92%	0.69%
White	-4.52%	-2.72%	-3.97%

Source: American Community Survey

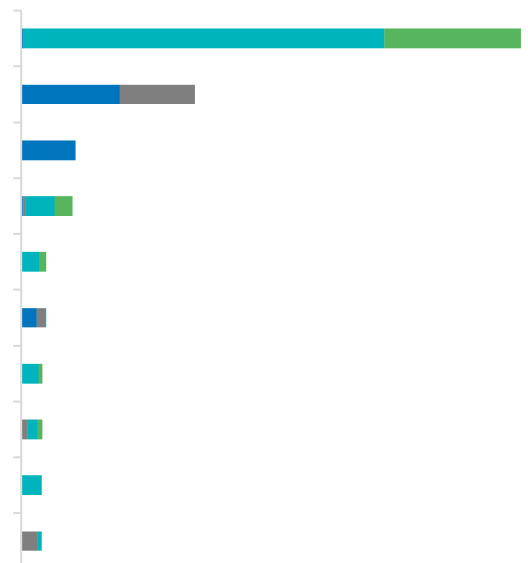
Education

The Region is home to 62 college and university campuses, including The Ohio State University, a tier-1 research university. In 2019, there were 36,939 post-secondary graduates in the Region. This pipeline has grown by 2% over the last five years. The Ohio State University, Columbus State Community College, and Franklin University contribute the greatest numbers of graduates:

FIGURE: Educational Pipeline

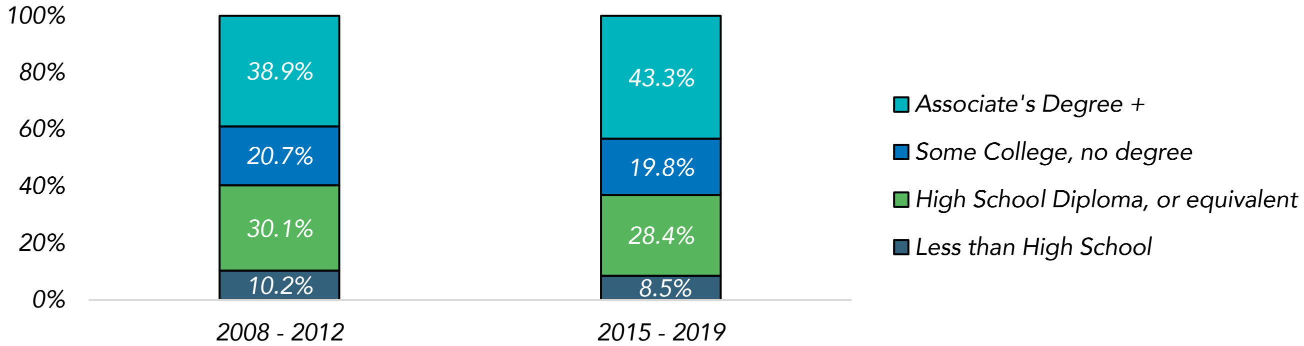
School	Total Graduates (2019)
Ohio State University - Main Campus	16,970
Columbus State Community College	5,894
MyComputerCareer.edu-Columbus	1,844
Franklin University	1,740
Capital University	848
Hondros College of Nursing	842
Otterbein University	729
Ohio Christian University	725
Denison University	698
Ohio State University - Newark Campus	698

Source: EMSI, Class of Worker Data 2021.2



Educational attainment in the region is strong and improving, leading to a skilled and educated regional workforce. The share of residents with a college degree is 5.5% greater than the state average.

FIGURE: Share of Population by Educational Attanment (Adults 25 & Older)



Source: American Community Survey

Socioeconomic

The region has experienced strong wage growth in recent years. From 2010-2018 increases in annual average wages ranged from 10.5-21.8%.

FIGURE: Average Annual Wages

County	2010	2014	2018	Change 2010-2018
Delaware	$46,433	$50,898	$55,330	19.2%
Fairfield	$32,504	$34,617	$38,458	18.3%
Franklin	$46,293	$50,906	$56,374	21.8%
Knox	$35,946	$40,399	$43,064	19.8%
Licking	$35,440	$38,551	$42,312	19.4%
Logan	$39,651	$41,814	$46,041	16.1%
Madison	$36,487	$40,199	$43,590	19.5%
Marion	$35,926	$37,881	$41,280	14.9%
Morrow	$30,646	$34,097	$35,922	17.2%
Pickaway	$37,386	$39,925	$45,223	21.0%
Union	$52,935	$54,967	$58,518	10.5%

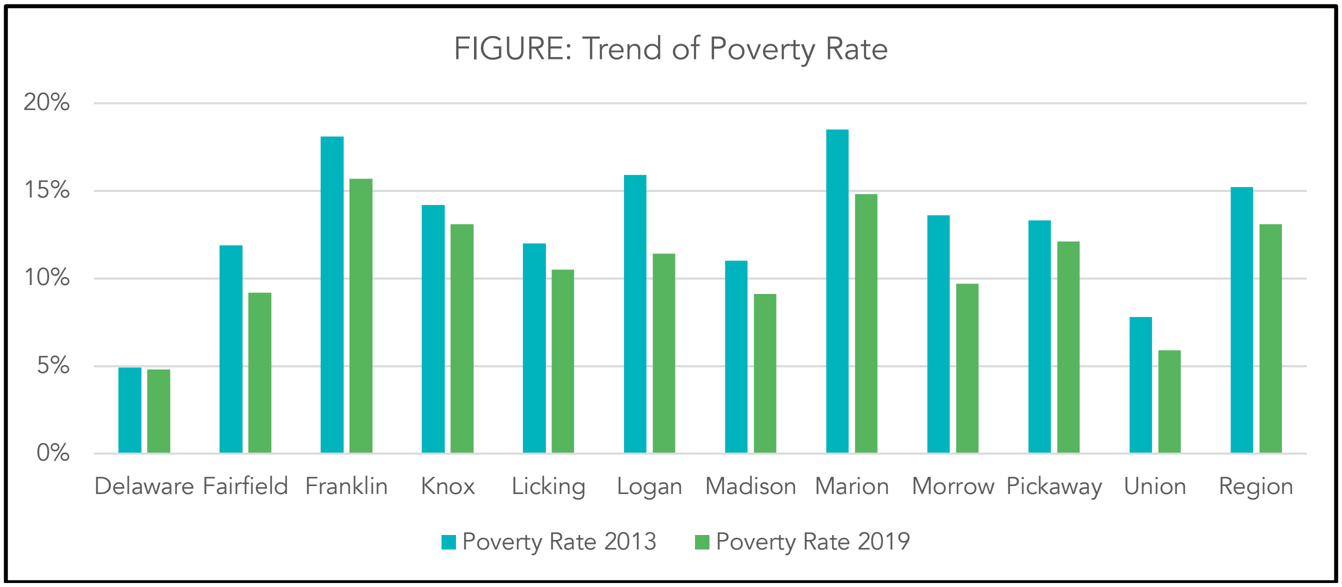
Source: Bureau of Labor Statistics

Rising wages and a growing economy supported a decrease in poverty rates from 2013-2019, however as of 2019 the rate for the Region was higher than the U.S. average of 12.3%.

FIGURE: Trend of Poverty Rate

County	Total Population 2013	Population in Poverty 2013	Poverty Rate 2013	Total Population 2019	Population in Poverty 2019	Poverty Rate 2019
Delaware	174,984	8,570	4.9%	198,250	9,530	4.8%
Fairfield	144,217	17,096	11.9%	151,338	13,930	9.2%
Franklin	1,155,599	208,639	18.1%	1,260,187	197,950	15.7%
Knox	57,517	8,180	14.2%	57,946	7,593	13.1%
Licking	162,994	19,567	12.0%	169,176	17,750	10.5%
Logan	45,036	7,151	15.9%	44,753	5,090	11.4%
Madison	38,501	4,235	11.0%	38,609	3,518	9.1%
Marion	60,222	11,170	18.5%	59,343	8,790	14.8%
Morrow	34,312	4,677	13.6%	34,664	3,363	9.7%
Pickaway	51,251	6,829	13.3%	53,003	6,431	12.1%
Union	49,153	3,844	7.8%	53,341	3,143	5.9%
TOTAL	1,973,786	299,958	15.2%	2,120,610	277,088	13.1%

Source: American Community Survey

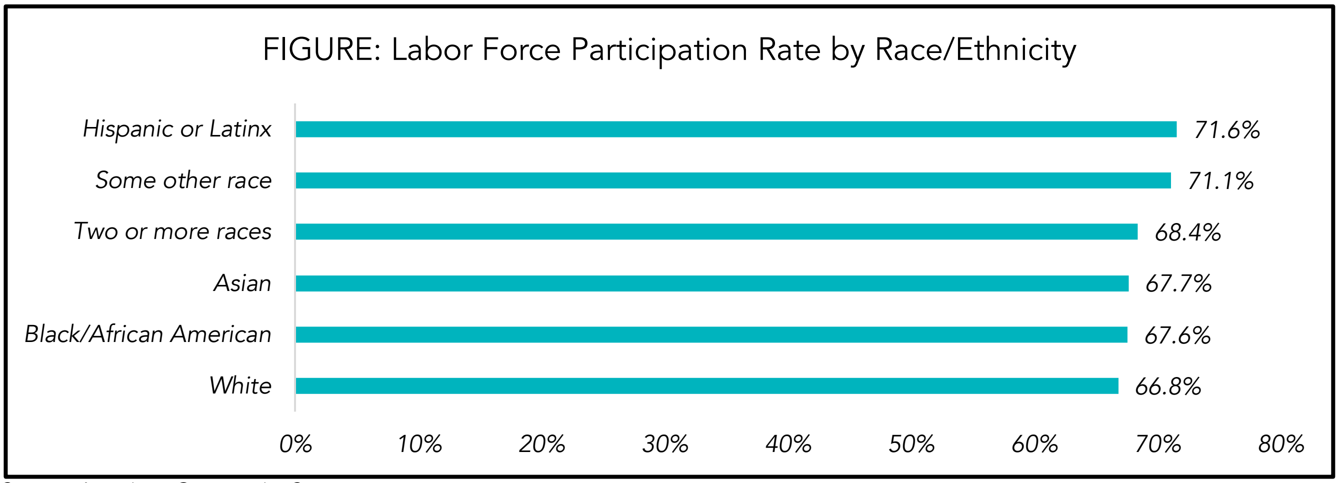


Source: American Community Survey

Labor Force and Employment

The regional labor force participation rate has declined from 65 percent in 2010 to 63 percent in February 2020, just before pandemic impacts took hold. The regional rate continues to outpace the national rate, however, which was 65 percent in 2010 and 63 percent in February 2020 (*sources: Bureau of Labor Statistics, EMSI, Class of Worker Data 2021.2)*

The racial distribution of labor force participation and unemployment in the Region is uneven, with lower labor force participation and unemployment rates among white residents as of 2019. The Hispanic/LatinX population had the highest rate at 71.6 percent and the white population had the lowest at 66.8 percent from 2015 to 2019.



Source: American Community Survey

Notably, the negative economic impacts of the Covid-19 pandemic impacted non-white residents most acutely. Nationally, 41% of Black-owned businesses closed from February to April 2020, compared to 32% of Latinx-owned businesses, 26% of Asian-owned businesses, and 17% of white-owned businesses (*source: Stanford Institute for Economic Policy Research*).

Macroeconomic Statistics

On a county level, the largest economies in the Region by GRP (greater than $4 billion) are Delaware, Fairfield, Franklin, Licking, and Union. Only one county (Delaware) has a higher cost of living index than Franklin County. Notably, Franklin and Union Counties have higher levels of exports than imports, reflecting their relatively high levels of advanced manufacturing.

FIGURE: Regional Macroeconomic Overview

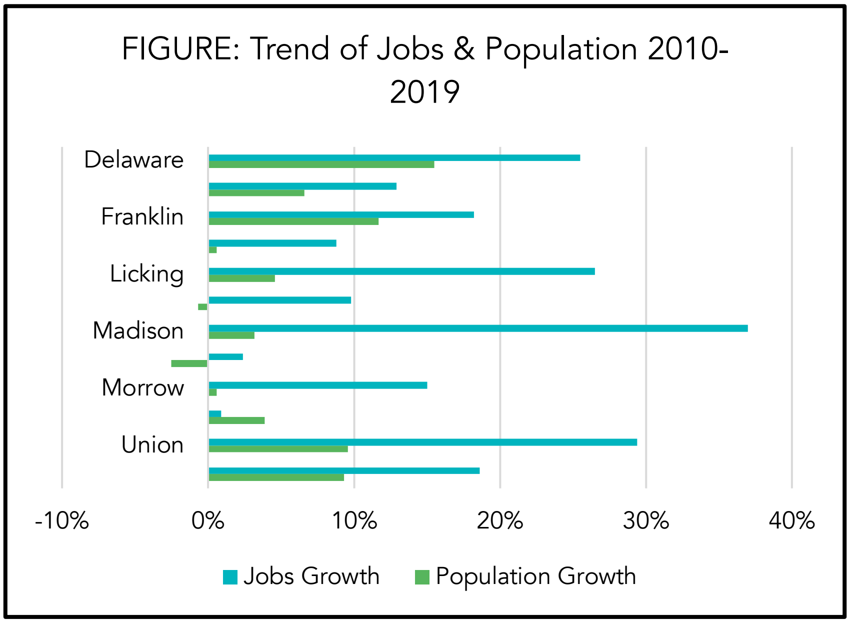
Geography	Population (2020)	Labor Force (2020)	Jobs (2020)	Cost of Living	GRP	Imports
Columbus Region	2,260,328	1,157,986	1,186,763	94.7	$142.99B	$122.88
Delaware	213,170	111,852	96,791	104.9	$12.33B	$14.66
Fairfield	159,465	78,482	48,392	92.9	$4.67B	$8.26
Franklin	1,334,655	702,319	819,908	100.0	$102.64B	$75.22
Knox	62,921	31,067	23,243	91.9	$2.31B	$3.57
Licking	179,028	90,464	76,150	92.9	$7.28B	$10.48
Logan	45,896	22,332	19,884	93.8	$2.00B	$3.50
Madison	45,206	20,885	19,381	94.7	$1.74B	$3.89
Marion	65,204	27,871	25,719	89.3	$2.61B	$3.94
Morrow	35,530	16,845	6,743	92.1	$723.13B	$1.71
Pickaway	58,894	26,492	15,757	91.0	$1.69B	$4.17
Union	60,360	29,377	34,795	98.6	$5B	$7.04

Source: EMSI, Class of Worker Data 2021.2

From 2010 to 2019, Bureau of Labor Statistics data suggest a 17.1 percent increase in average annual employment in the region. While this strong growth, in part, reflects the recovery from the Great Recession, the Region is better positioned than most to weather economic downturns and recover more quickly. Significant employment in stable industries like health care, insurance, higher education, and state government; a prime location for logistics operations; world-class research institutions; and a diversity of industries all contribute to the region's economic resilience.

FIGURE: Trend of Jobs		
County	2010	2019
Delaware	72,153	90,527
Fairfield	39,029	44,048
Franklin	647,397	765,429
Knox	18,719	20,361
Licking	50,308	63,633
Logan	17,542	19,255
Madison	13,129	17,987
Marion	24,326	24,904
Morrow	4,738	5,448
Pickaway	13,787	13,913
Union	25,915	33,532
TOTAL	927,043	1,099,037

Source: Bureau of Labor Statistics



Infrastructure Assets That Relate to Economic Development

The Columbus region is positioned as a fulcrum for distributing goods to the Eastern United States and Midwest. Its physical infrastructure is extensive and augments its close proximity to large markets (goods leaving Columbus can reach approximately 46 percent of the U.S. population within a 10-hour drive).

Corporate offices are being built or rebuilt as infill projects in and near urban centers as well. There are also major employment centers that are continuing to add new businesses beyond urban centers across the region. Airports - especially John Glenn International Airport, and Rickenbacker International Airport and Intermodal Yard - serve as hubs for logistics, distribution and warehousing. Additional sites serve as major centers of research and development, light manufacturing and warehousing. Additionally, there are major office parks combined with regional shopping centers.

Notably, the Region has a significant advanced automotive industry cluster. This cluster is supported by all levels of government, universities, non-profit organizations, and a spectrum of private sector employers from microbusinesses to international companies with a strong presence in our region. These supporters include Honda Development and Manufacturing of America, the Transportation Research Center, The Ohio State University, the National Highway Transportation Safety Administration, and numerous others. The advanced automotive industry in the Columbus Region employs people from every county – rural and urban – and offers upward career mobility for individuals of all educational attainment levels – high school diploma and GED through PhD.

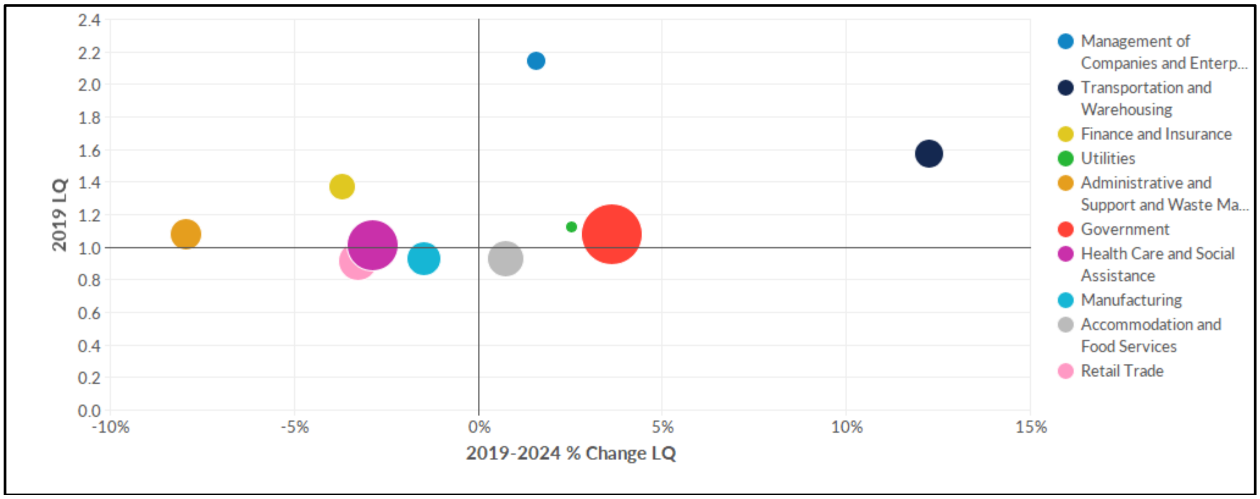
Emerging or Declining Clusters/Sectors

Location Quotients (LQs) compare the relative concentration of an industry in a local economy with the average concentration seen at the national level. An LQ of 1.5 indicates that the local economy has 50 percent more jobs per capita in that industry than witnessed at the national level. An LQ of 1.0 indicates parity, and an LQ below 1 indicates a below-average concentration.

The bubble chart in the following section shows LQ by industry on the vertical axis. The horizontal axis shows the projected 5-year percentage growth for the industry, and the size of the bubble indicates the relative number of jobs in the industry.

The graph's quadrants each tell a different story. While sectors in the top-right quadrant are viewed as competitive and should be priorities for talent development, sectors to the bottom-right (which are growing but have below-average concentrations) typically require special attention such as entrepreneurial assistance or new workforce training programs.

FIGURE: Location Quotient vs. Change in Location Quotient by Sector



Sources: Bureau of Labor Statistics, Source: EMSI, Class of Worker Data 2021.2

The Region has clear strengths in Management of Companies and Enterprises, Transportation and Warehousing, Government, and Utilities. The only major sector in the lower-right quadrant, Accommodation and Food Services, reflects increasing service-sector needs to support a growing population.

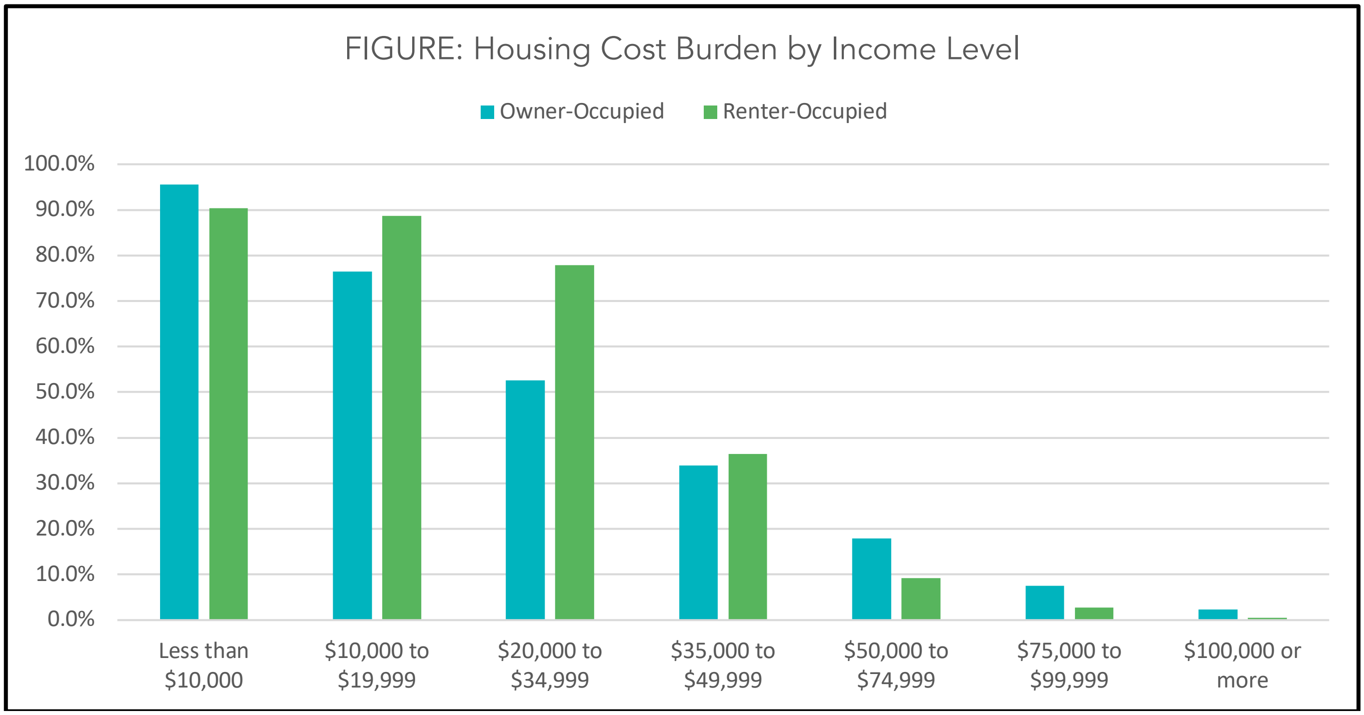
The table below also reflects these trends, with the addition of relative salary levels, from relatively low (blue) to relatively high (green). Again, the region's strengths stand out in Management of Companies and Enterprises, Transportation & Warehousing, Manufacturing, and Finance & Insurance.

FIGURE: Employment, Location Quotient, & Average Salaries by Sector				
			2020 AVERAGE SALARY	
INDUSTRY	2020 EMPLOYMENT	2020 LQ	Columbus Region	U.S.
Utilities	4,608	1.13	$111,203	$115,944
Construction	55,315	0.81	$63,745	$62,555
Manufacturing	84,606	0.92	$67,091	$72,840
Retail Trade	104,364	0.91	$34,458	$36,892
Transportation & Warehousing	82,027	1.72	$52,590	$56,426
Finance & Insurance	66,886	1.34	$94,668	$119,371
Professional, Scientific, & Technical Services	70,001	0.87	$84,591	$102,933
Management of Companies & Enterprises	37,112	2.15	$121,599	$132,560
Administrative & Support & Waste Management & Remediation Services	74,547	1.05	$41,571	$45,449
Health Care & Social Assistance	151,235	0.99	$52,145	$55,319
Arts, Entertainment, & Recreation	15,364	0.92	$35,490	$45,229
Accommodation & Food Services	81,332	0.96	$20,314	$23,196
Government	192,349	1.07	$60,284	$59,776
TOTAL	989,169		$58,023	$61,276

Source: EMSI, Class of Worker Data 2021.2

Housing

The pattern of recent regional growth has changed compared with prior periods of expansion. Preferences and lifestyles of the growing number of older adults and young adults in the region are changing demand for housing. This changing demand, along with a shifting emphasis on the quality of life and cost-saving benefits of more compact development, have resulted in the most centralized and compact growth pattern the region has experienced in decades. Furthermore, the highly competitive real estate market and a persistently high poverty rate have led to more vulnerable groups struggling to find housing in neighborhoods of their choice. The U.S. Department of Housing and Urban Development considers households paying 35% or more of their gross income in housing to be housing cost burdened. Most renters and homeowners making less than $35,000 in the region are housing cost burdened.



Source: American Community Survey

In 2020 MORPC, along with regional partners, released the Regional Housing Strategy (RHS). The RHS identified five core regional housing issues:

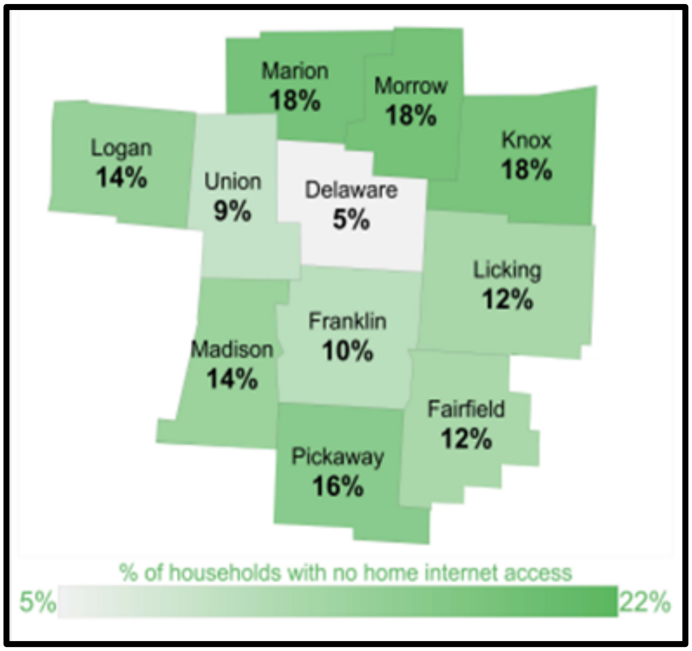
1. Increased competition for homes, driven by increased population growth, a low rate of housing production, and lasting impacts from the Great Recession.
2. Barriers limiting access to homes, including disparities in lending practices, creditworthiness, housing instability, and housing discrimination.
3. Limited supply of homes priced for low-income households, as more homes are built at higher price points, the region loses some of its existing affordable options (including single-family rentals and expiring subsidized housing), and demand for rental assistance continues to outweigh supply.
4. Demand for more homes that serve a wider range of ages, abilities, and household sizes, which is growing as a result of the region's changing demographics. This includes trends like the increasing racial and ethnic diversity in Central Ohio and the growing number of both older and younger adults in the region.
5. Housing instability among Central Ohioans, as reflected in the region's rates of cost-burden, evictions, homelessness, and homes in need of repair.

Broadband and Internet Access

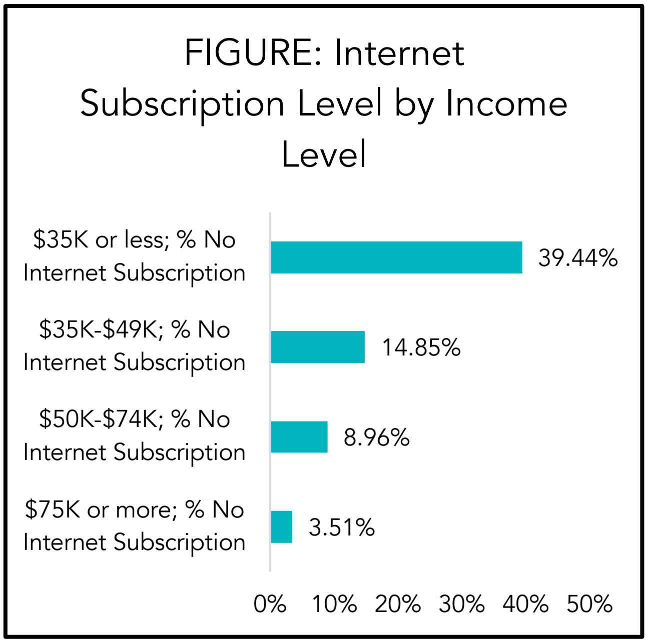
Broadband access is a challenge for households throughout Central Ohio for several reasons. Rural areas still face significant infrastructure gaps, and in urban and suburban communities where broadband infrastructure is nearly ubiquitous, affordability and adoption hurdles exist for some residents. In 2019 in some of the region's most rural counties, nearly one in five households lacked home internet. In Franklin County, one in ten had no home internet. Among households that have home internet, there are disparities in connection speed and in access to appropriate devices. An analysis of Columbus broadband challenges produced by AECOM suggests that there are geographical disparities in internet speed, which can be a limiting factor in how effectively home internet can be used for things like remote school, telework, or telehealth.

Lack of broadband disproportionately impacts low-income households. Nearly 40% of households with an annual income less than $35,000 are without broadband. Lack of home internet is also prevalent in older adult households.

FIGURE: Households with No Internet Access (2019)



Source: American Community Survey



Source: American Community Survey

Economic Resilience and Diversity, Equity, and Inclusion

The Columbus Region CEDS highlights essential sectors and strengths that are key to economic resilience, while highlighting other needs and weaknesses that, if addressed, would better prepare the Region for economic shocks and displacement. Importantly, the pandemic has also exposed and exacerbated the inequalities that exist across and within our communities.

In exploring the Columbus Region's successes and challenges, topics around Diversity, Equity, and Inclusion were discussed. The Region has a long history of working to ensure that all segments of the population have access to quality programs and services needed to provide high-value job opportunities to all residents. This commitment to an ongoing conversation about this difficult but significant topic will continue and have ongoing benefits for regional economic resilience.

The visions contained in the CEDS action plan, particularly the objectives around increased labor force utilization, are intended in part to address barriers faced by underserved urban and rural communities. To build resilience in our economy and communities, we are convening to build broad, inclusive growth and development across the region.

COVID-19 Pandemic

The Columbus Region CEDS process and development took place as the coronavirus pandemic continued to spread throughout the U.S. Many datasets provided in the summary background of the plan are reflective of the region's economy prior to the pandemic, during a time of positive momentum in economic and population growth. MORPC is prepared to deliberately address economic vulnerabilities exposed by the pandemic and leverage key assets and partnerships to build economic prosperity and resilience.

In 2021, MORPC and its partners released a series of policy briefs aimed at understanding regional recovery from the lingering and expected impacts of the COVID-19 pandemic. These briefs are incorporated into this CEDS as Appendix A.

The briefs provide a closer look at the status of the region before COVID-19, as well as the economic, social and growth impacts as a result of the pandemic – with analysis and insights on the medium- to long-term impacts.

In some cases, the COVID-19 pandemic accelerated existing trends and issues – income inequality, housing instability and shifts to online retail. In other cases, new challenges for the region emerged – global supply chain shortages, historic unemployment, and social and physical isolation of communities.

While some individuals and businesses bounced back quickly and even gained during the shutdowns, those who were already struggling the most were hardest hit. This includes households and businesses led by people of color and those with smaller budgets. Also, the leisure and hospitality sector lost nearly 50% of its employment in March and April 2020, and has only partially recovered that loss. Because this sector's jobs are predominantly lower wage and lower skill, this is a particular concern. Other partners who worked on the briefs include: Franklin County; One Columbus; Regionomics; United Way of Central Ohio; the Human Services Chamber of Franklin County; and Franklin County Public Health.

The policy brief topics are:

- Economic and community development
- Employment and small businesses
- Housing
- Social sector
- Technology and broadband access
- Transportation
- Public health

The briefs examine the most pressing issues for each topic. They draw on quantitative data from a range of sources, combined with qualitative data collected through interviews and focus groups.

A distinguishing feature of the briefs is that they explain the long-term risks posed to community prosperity if the critical issues are not addressed, providing motivation for new funding decisions and policies to address health, racial and income disparities.

Opportunity Zones

Opportunity Zones are an economic development tool that allows people to invest in distressed areas in the United States. Their purpose is to spur economic growth and job creation in low-income communities while providing tax benefits to investors.

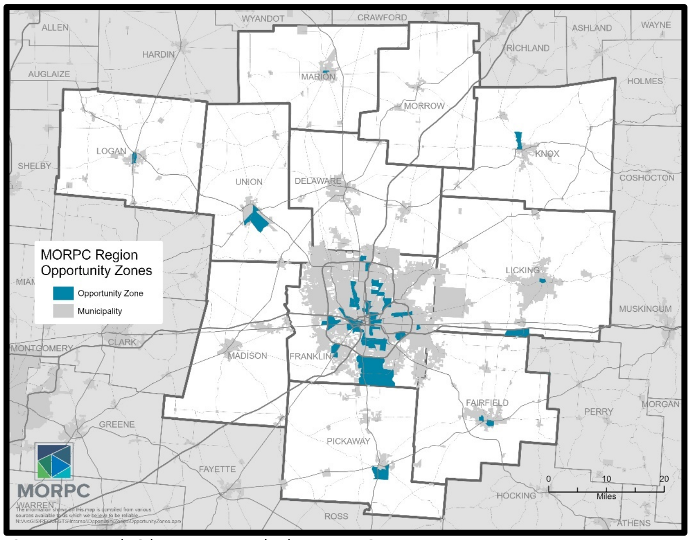
Opportunity Zones were created under the Tax Cuts and Jobs Act of 2017 (Public Law No. 115-97). Thousands of low-income communities in all 50 states, the District of Columbia and five U.S. territories are designated as Qualified Opportunity Zones. Taxpayers can invest in these zones through Qualified Opportunity Funds.

The Columbus Region contains 52 opportunity zones covering over 97 square miles. Franklin County contains most of these zones at 43.

FIGURE: Columbus Region Opportunity Zones

County	# of OZs	Area (sq. mi.)
Fairfield	2	1.95
Franklin	43	71.56
Knox	1	2.69
Licking	2	5.53
Logan	1	1.31
Marion	1	0.35
Pickaway	1	5.36
Union	1	8.28
TOTAL	52	97.04

Source: Mid-Ohio Regional Planning Commission



Source: Mid-Ohio Regional Planning Commission

Opportunity zones are aligned with the goals of the CEDS. They are a key tool to increase and align community investments to support economic development. Boosting private investment in these areas has potential to address infrastructure and other barriers to labor force participation.

University Centers

The purpose of EDA’s University Center program is to enable institutions of higher education and consortia of institutions of higher education to establish and operate University Centers (UCs) specifically focused on leveraging university assets to build regional economic ecosystems that support innovation and high-growth entrepreneurship, resiliency and inclusiveness. By responding to the economic development needs of their regions, University Center programs are demand-driven by nature. Historically, UCs have been leaders in promoting and facilitating economic development in their regions. They have been among the first to recognize emerging technical assistance needs.

The Columbus Region is covered in part by the Rural Universities Consortium (RUC). Bowling Green State University’s (BGSU) Center for Regional Development (CRD) and Ohio University’s (OU) Voinovich School of Leadership and Public Affairs comprise a joint University Center known as the RUC. EDA's funding allows the Center for Regional Development to partner with economic developers and businesses on expansion and attraction projects, particularly in underserved rural communities. (source: Economic Development Administration)

Incorporation of Other Plans and Strategies

MORPC, both as a regional leader and in its role as the Columbus Region's Metropolitan Transportation Organization (MPO) and Regional Council, regularly produces planning documents covering surface transportation, mobility, public infrastructure, economic development, and community development priorities. These plans, program, and initiatives each involve months or years of continuing stakeholder engagement, modeling, and evaluation.

The following plans are reflected throughout the CEDS and serve to expand on key concepts and strategies.

- 2020-2050 Metropolitan Transportation Plan
  - Long-range MPO planning document
- 2021-2024 Transportation Improvement Program
  - Short-range MPO planning document
- Competitive Advantage Projects
  - Initiative to advance strategic infrastructure investments across the Region
- Central Ohio Rural Planning Organization (CORPO)
  - Partnership with seven counties in the nonmetropolitan areas of our region to provide transportation planning products and services
  - CORPO also produces long-and short-range transportation planning documents reflecting the unique transportation needs of its counties
- Regional Housing Strategy
  - MORPC, the City of Columbus, and other regional partners released a first-of-its-kind housing strategy for Central Ohio
- Regional Mobility Plan (to be released in 2021)
  - The Regional Mobility Plan will identify local transportation needs of people with disabilities, older adults, and those with low incomes
- Insight2050 (2014-present)
  - Study of growth in region that considers demographic and development trends to bring forward strategies for future regional growth
- Rickenbacker Area Study (2018)
  - Study providing recommendations to position the Rickenbacker area as a complete community, as well as a successful international logistics hub
- Sustainable2050
  - Program to support MORPC members' sustainability efforts through direct technical assistance, collaboration, and recognition

- Rapid Speed Transportation Initiative (Midwest Connect)
    - Initiative focused on improving connectivity to Chicago and Pittsburgh through exploration of two transportation technologies, including traditional passenger rail and hyperloop
- Rapid 5
    - A collaboration of MORPC, the Urban Land Institute of Columbus, Columbus and Franklin County Metro Parks, and many public and private partners throughout Central Ohio, with the goal of connecting our region’s major waterways and trails into one interconnected, greenspace system

SECTION 2: SWOT ANALYSIS

The following section provides a summary of the Columbus Region's strengths, weaknesses (challenges), opportunities and threats (SWOT). The SWOT Analysis draws conclusions from the data analysis in the Summary Background, the Strategy Committee, tours of the Region, outside advisors' national perspectives and expertise, staff observations, and extensive input from regional representatives who participated in discussions and interviews.

Strengths

- Economic development leadership, led by One Columbus and Jobs Ohio
- The Columbus Region is younger and more educated than the national average, leading Ohio and the Midwest in both population and millennial growth
- Relatively low cost of living and business expense
- Robust workforce institutions with mature training programs and sector partnerships
- Significant regional headquarters presence
- Strong manufacturing sector
- The Region is positioned at the forefront of transportation and logistics, including advanced automotive manufacturing, research, and development (CASE: Connected, Autonomous, Shared, and Electrified vehicles)
- Growing entrepreneurial, venture capital, and innovation economies
- Mature 'smart city' strategies including smart mobility and energy
- The Columbus Region is home to 62 college and university campuses supporting a large and increasing pipeline of graduates, as well as an adult population that is more educated than the national average.
    - These institutions support a large and increasing pipeline of in-demand, tech savvy graduates
    - The Ohio State University is a primary partner of the community for research in nearly every science and technology-driven industry
- The Region has a strength in logistics, featuring greater access to the U.S. market within a 10-hour drive than any other major metro, multiple rail terminals, and Rickenbacker International Airport
- Rickenbacker International Airport is one of the world's only cargo-dedicated airports located near a major metropolitan area with room and plans in place for continued growth
- Mild climate with relatively low risk of natural disasters
- Strong site inventory and site development capabilities
- Highly collaborative, engaged, interconnected culture around growth strategies – public and private (Columbus Way)

Weaknesses

- Underutilized labor force – lack of access to credential and skill development opportunities across the Region
- Lack of coordinated support for small business development
- The skills and wage gaps between economically distressed and affluent areas of the Region are persistent
- Lower immigration numbers than other growing metropolitan areas
- There is inconsistent utility supply coverage across the region, including natural gas and water
- Lack of mobility options, particularly in rural counties
- Need for more manufacturing – the regional economy is relatively services-heavy
- Lack of EDA-funded Revolving Loan Funds (RLF) – there is only one in the Region
- The Region lacks diverse multi-modal mobility options that support industry and mitigate the financial and time burden of worker and student commutes.
- Housing access and affordability
- There are gaps to uniform broadband access across the region for residents and businesses.
- The Columbus Region does not have direct flights to Europe or Asia

Opportunities

- Growth in programs to provide needed skills and credentials, including:
  - Science, Technology, Engineering, and Mathematics
  - Commercial and freight drivers (CDL)
  - Startup and entrepreneurial talent
  - Registered Nurses
  - Software developers
- Regional leaders must regularly measure and address structural issues that have led to an equity gap with broad impacts for residents and businesses
- It will be necessary to become far more diverse, engaging across rural and urban areas and minority communities, while also attracting talent from across the world
- Improvement and promotion of vocational and skilled trade educational opportunities will improve labor market access and efficiency
- Build on key sector strengths, including:
  - Management of Companies and Enterprises
  - Automotive
  - Fintech and insurtech
  - Logistics
  - Diverse manufacturing sector
  - Additional warehousing
  - Additional data centers
- Capitalize on emerging sectors, including
  - Electric vehicles, batteries, and other innovative energy technologies
  - Smart mobility and advanced automotive manufacturing
  - Technology and venture capital
- Create synergies between higher education and workforce training
- There is potential for significant growth in cargo capacity at Rickenbacker International Airport and in warehousing capacity and technology in the surrounding logistics hub
- The Region must bring forward transportation access options on par with other leading national and global regions
- As the Columbus Region continues to grow economically, its air service within the U.S. and internationally will likely improve

Threats

- Employers are demanding a more skilled workforce, a trend that is increasingly true regardless of industry or vocation
- Immigration policies limit the region's ability to capture the value of the talented international student population within the area over the long term, especially STEM graduates
- The Region must remove barriers to international immigration and workforce attraction wherever possible
- The gap between communities that are thriving and those that are impoverished within the Region threatens regional prosperity
- We must meet the challenges presented by automation
- The Region's advanced automotive cluster must respond as industry shifts towards electric and autonomous vehicles and away from traditional combustion engines
    - These shifts in the automotive manufacturing, research, and development industry could lead to highly detrimental outcomes for the workforce and the economy broadly in the Region if not addressed
- A lack of skilled workers could create a competitive disadvantage for the Columbus Region as is seeks to secure additional investment and jobs from existing companies and those considering the area for new facilities
- Significant challenges to housing access and affordability across the region
- There is a need for greater regional alignment to create a globally competitive multimodal mobility system
- Relative lack of manufacturing exposes the region to service industry shocks
- The higher education system is being challenged to not only deliver a talented workforce, but also comprehensive research
- Government entities are undergoing a massive shift in technologies to serve citizens and to achieve status as smart cities

SECTION 3: CEDS ACTION PLAN

Population and Demographic Background

Responses derived from the SWOT analysis led to the creation of overarching goals to align the Region's economic development capacity and support prosperous communities. First, the Region must continue to support and align around the efforts of economic development leaders, including One Columbus and JobsOhio.

Next, to reach a higher degree of economic prosperity, the region must address labor force access barriers to allow for all people, no matter income, race/ethnicity, or social characteristics, to have opportunities towards building wealth and economic stability and mobility. These barriers include housing affordability and access, broadband access, mobility, childcare, and dependent care.

Finally, we must maintain and extend our world-class infrastructure investments to drive continued growth and opportunity for all regional communities.

Vision 1: Build on Economic Development Success

This vision is aligned with and supportive of the One Columbus strategic plan (2019), which itself was based on hundreds of meetings, conversations, and forums across the Region. The One Columbus strategic plan is incorporated into the CEDS as Appendix B.

Vision Statement

The Region has experienced broad, sustained economic growth since the Great Recession. Regional stakeholders must continue to support our economic development leaders and build long-term economic resilience through growth and diversification.

Goals

Goal 1: Maintain and build on competitive advantages

- Serve existing businesses: Create the most competitive economic base in the United States
- Attract new businesses: Create the most diverse employment and tax base in the United States
- Support entrepreneurship and accelerate high-growth firms: Create a seamless continuum of services for venture-backed startups and high-growth firms to scale within the Columbus Region

Goal 2: Align regional strategies to support strategic growth priorities

- Prepare communities for the future: Become the most prepared area in the United States for growth and investment
- Increase global trade and investment: Lead our peer regions in foreign investment and export growth
- Market and promote the Columbus Region globally: Become known as the most prosperous economy in the United States
- Priority Economic Sectors: To increase employment and overall payroll in each economic sector over the next decade, we will focus on these key industries:
  - Manufacturing
  - Research & development
  - HQ & business services
  - Logistics
  - Automotive innovation

Goal 3: Leverage the collaborative, interconnected culture to succeed

- Align regional strategies: ensure that local and regional plans are contextualized with common challenges and opportunities

<u>Objectives</u>

Aligned with the One Columbus strategic plan, the objectives from 2020-2030 for Vision 1 are:

- Add $3.3 billion of payroll in communities within the Columbus Region
- Secure 60,000 net new jobs in the Columbus Region. Full-time jobs with benefits remain a powerful way to change lives and build sustainable communities
- Attract $10 billion of capital investment to the Columbus Region from our economic base projects

<u>Key Partners</u>

One Columbus, JobsOhio, Delaware County Economic Development, Fairfield County Economic and Workforce Development, Franklin County Economic Development & Planning, Knox County Area Development Foundation, Inc., GROW Licking County, Logan County Chamber of Commerce, Madison County Chamber of Commerce, Marion CAN DO!, Morrow County Economic Development, Pickaway Progress Partnership (P3), Union County - Marysville Economic Development, Mid-Ohio Development Exchange, the Columbus Chamber of Commerce, Rev1 Ventures, Central Ohio Community Improvement Corporation, Future Ready Columbus, Columbus Council on World Affairs

Vision 2: Increased Labor Force Utilization

Vision Statement

Addressing barriers to labor force participation, particularly for marginalized populations, will enable the region to build on its economic development leadership and contribute to prosperous communities. Three key priority areas are housing access, broadband access, mobility, and workforce re-entry.

Goals and Objectives

Goal 1: Increase housing affordability and access

- Review green tape development trends
- Offer more tenant-based rental assistance to address housing instability
- Enact source of income protection laws
- Create a State-level housing tax credit to support priority housing development
- Create a pilot that supports the development of diverse, lower-cost housing products, leveraging innovative design and construction techniques

Key Partners: Affordable Housing Alliance of Central Ohio, Affordable Housing Trust, Building Industry Association of Central Ohio, regional transit authorities, Columbus Metropolitan Housing Authority, Columbus Urban League, regional community improvement corporations, Ohio Capital Corporation for Housing, Ohio Housing Finance Authority

Goal 2: Enable high-speed broadband internet access for the significant portion of our regional population that lacks it

- Increase the number of affordable, reliable, high-speed internet options for residents and businesses in underserved areas
- Invest in innovative broadband access approaches
- Support digital literacy across the region, giving students and job-seekers the tools to seek out employment

Key Partners: Columbus Metropolitan Library, regional library systems, National Digital Inclusion Alliance, Smart Columbus, The Columbus Foundation, Broadband Ohio, regional school systems, OhioMeansJobs, One Columbus

Goal 3: Enhance mobility through innovative initiatives

- Encourage electric vehicle (EV) adoption through investment in EV infrastructure and public engagement
- Expand transit-oriented development (TOD) approaches across the region
- Increase options for rural mobility, including for seniors and disabled residents

Key Partners: Smart Columbus, Columbus Partnership, City of Columbus, Clean Fuels Ohio, regional transit authorities, and numerous public and private partners along transit-oriented development corridors (e.g., businesses, local governments, etc.)

Goal 4: Expand and Enhance Workforce Re-Entry Programs

- Create a military transition program to assist veterans with seeking civilian employment after exiting the military
- Develop a program to assist enhance the employability of those needing re-entry services
- Consider launching a Back to Work 50 initiative through the AARP Foundation to re-engage the older workforce who are unemployed or underemployed
- Establish a "returnship" program to recapture the portion of the workforce that has been out of work for a significant amount of time and need exposure to the workplace to upskill for today's in-demand occupations

Key Partners: Smart Columbus, Columbus Partnership, Regional Employers, AARP Foundation, Recovery Services Organizations, Ohio Department of Rehabilitation and Correction, Regional Jail Systems, Veterans Service Organizations

Vision 3: Increased and Aligned Infrastructure Investment

Vision Statement

We must continue to identify and prioritize key infrastructure investments that prepare regional communities for continued economic and community development.

Goals and Objectives

Goal 1: Prioritize supportive infrastructure projects

- Improve regional coordination of priority infrastructure projects
- Identify trends in infrastructure needs related to economic development across the Region

Goal 2: Increase regional infrastructure investment

- Obtain new funding for prioritized projects
- Encourage new state and federal programs to increase and align infrastructure investment related to economic development

Key Partners

Regional county engineers, Ohio Department of Transportation, Ohio Department of Development, regional water and wastewater authorities, regional transit authorities, Central Ohio Greenways, utilities providers, Ohio Gas Access Partnership, Columbus Regional Airport Authority, railroad corporations

SECTION 4: EVALUATION FRAMEWORK

Population and Demographic Background

The evaluation framework serves as a mechanism to gauge progress on the successful implementation of the overall CEDS while providing information for ongoing monitoring. This monitoring keeps the strategic direction and action plan outlined in the CEDS current and relevant.

Each vision identified in the action plan has a set of performance measures that can be monitored over time to achieve the objectives of the CEDS.

Vision 1: Build on Economic Development Success

- Net new jobs
- Gross regional product
- Relative gains in the tax base
- Median wages
- Racial employment and labor force participation
- Community measures of housing opportunity
- Educational attainment
- Physical and economic mobility of the workforce
- Venture capital investment
- Patent development

Vision 2: Increased Labor Force Utilization

- Percent of 18- to 24-year-olds enrolled in a postsecondary institution
- Post-secondary education or high-quality credential attainment (all ages)
- Solutions to barriers implementing STEM programs
- Pre-K enrollment
- Percent of 25- to 44-year-olds in the labor force
- Households earning a livable wage
- Solutions for reoccurring barriers for marginalized populations
- Metrics around populations historically unemployed or underemployed
- Performance metrics around existing or future workforce re-entry programs

Vision 3: Increased and Aligned Infrastructure Investment

- Average commute times
- Vehicle miles traveled, transportation system efficiency
- Public transit and alternative mode commuting patterns
- Cost of transportation as a percentage of income
- Number of airline seats and routes from regional airports

- Broadband access and affordability
- Water supply and treatment investments

Appendix A
Covid-19 Policy Briefs

CENTRAL OHIO
COVID-19
POLICY BRIEFS

ONE COLUMBUS

MID-OHIO REGIONAL MORPC PLANNING COMMISSION

ECONOMIC & COMMUNITY DEVELOPMENT

Summary

In the years leading up to the pandemic, the Central Ohio region experienced strong economic recovery following the Great Recession. There was strong growth in population and jobs, as Central Ohio retained diverse large employers and continued to attract new ones. The Columbus Metropolitan Statistical Area (MSA) added 190,000 jobs and 220,000 people from 2010 to 2019.

This growth led to capital investment in premium office space, retail, and industrial development. Growth was encouraged by private-public focus on amenity-rich development to help attract and retain young professionals to support economic development. Recovery did not occur without some challenges, namely aging real estate, workforce shortages, and a growing e-commerce market share.

The COVID-19 pandemic brought about massive economic disruptions, some that will have lasting effects. Both consumer and business reactions to the limitations introduced by pandemic disruptions accelerated some trends and reversed others. In many cases, these disruptions were accelerations of trends that were already occurring.

Key Issues

Remote work has become a more viable option for employers, putting the **future of office work** in question.

Consumer spending has shifted toward the home and home-based activities, and e-commerce is booming, which impacts retail economies at the regional, community, and neighborhood scale. Black-owned businesses in Ohio were impacted disproportionately, which may point to stronger **impacts on retail economies** in majority-Black neighborhoods.

Dramatic halts to overseas production and transportation bottlenecks have companies reimagining **supply chains and logistics** for their businesses.

The challenges of many Central Ohio residents in juggling childcare, transportation, and employment have been magnified by the pandemic, bringing about clearer perspectives around **workforce shortages** in the region. The labor force challenges are especially acute for non-white single mothers.

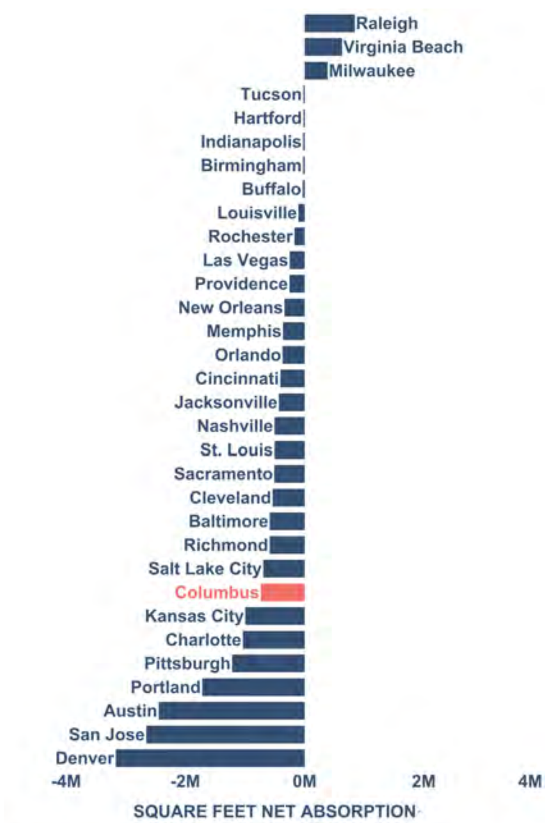
FUTURE OF OFFICE WORK

Office development is sensitive to trends in organizational culture. The recent trend in office work leading up to the pandemic was an employer focus on developing a strong employee culture, with an emphasis on collaboration-focused office space that supports high performance teams. This led to a shift toward production of premium-quality office environments with a higher price tag, a step above in quality compared to typical Class A office space.

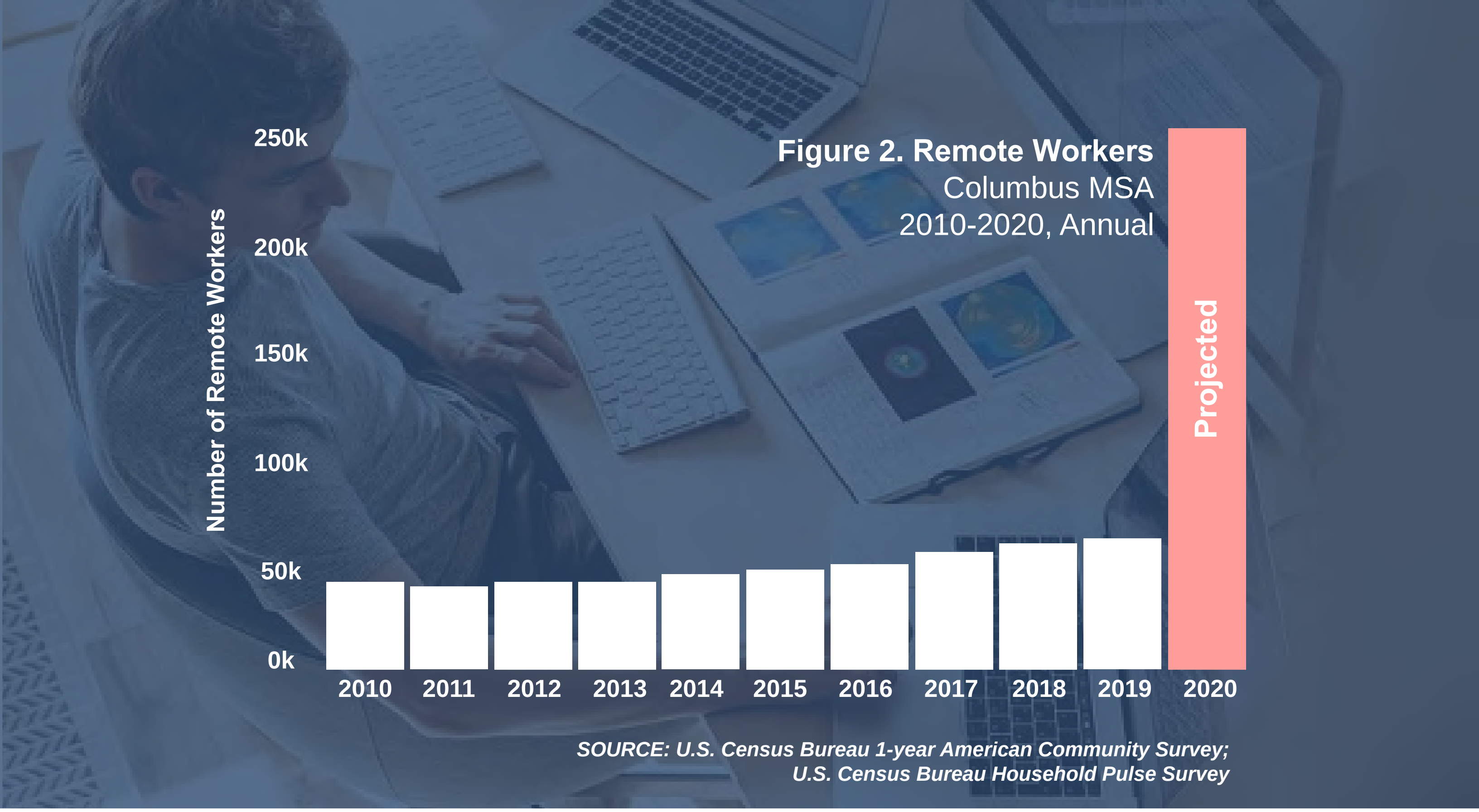
The pandemic and stay at home orders prompted many employers to shift to widespread telework, especially for office employees. While office construction projects in the works have continued to move forward, in 2020, the Columbus market experienced 730,000 square feet of negative net absorption of office real estate, ending the year with an office vacancy rate of 8.0% (compared with 6.8% at the end of 2019). According to NAI Ohio Equities, this is the first twelve-month negative net absorption in a decade in the Columbus market (Figure 1).[1,2] This indicates that, in addition to business closures, some employers are opting out of lease renewals or downsizing office space after seeing their remote teams performing well.

In addition to the impacts on commercial real estate and the future of office development, there are implications for local tax revenue streams. According to research from the Brookings Institution, 76% of the general fund in Columbus comes from income taxes paid by employees working within the municipal boundaries.[3] In 2018, a net of 21.5% of people working in the city of Columbus commuted in from surrounding communities.[4] Some number of the 305,000 commuters have worked from home since the pandemic onset. The Ohio State Legislature has introduced some short-term legislation to temporarily stabilize municipal income tax revenue as many office workers' primary work locations have shifted to their communities of residence.[5] Long-term voluntary shifts to remote work would not, however, be sheltered by such emergency legislation, which could have lasting impacts on the primary revenue stream in the City of Columbus.

Figure 1. Office Net Absorption
Comparable MSAs 2020
Yearly Total



SOURCE : Cushman & Wakefield (via OneColumbus)



Columbus is not the only municipality in the region that is vulnerable to these shifts. Suburbs that are heavily office-oriented and have a net inflow of workers could also suffer a net loss of revenue. Key examples include Dublin, with a net inflow of 22,645 (49% of total employment); Worthington (net inflow of 10,618, 59%); and New Albany (net inflow of 13,912, 76%).

Locally, the precise extent of the shift to telework is not clear. In the whole State of Ohio, household surveys conducted by the U.S. Census Bureau indicate that more than 30% of households had some adults working remotely nearing the end of 2020. With 820,000 households in the Columbus Metropolitan Statistical Area (MSA), this suggests that 250,000 Central Ohio households had at least one worker engaged in remote work in the end of 2020. That means that more than 20% of the region's workforce was working remotely at the end of 2020. By comparison, in 2019, 5% of the workforce, or 60,000 people, worked remotely. While the region has experienced some gradual increase in the remote work trend over the last decade, 2020 was a huge acceleration (Figure 2).

The long-term permanence of the recent expansion of telework remains in question. Based on conversations between One Columbus staff and Central Ohio employers, there will be some permanent shifts to remote work for at least some staff. A December 2020 survey of 1,000 hiring managers by Upwork found that by 2025, the number of remote workers could be 87% higher than before the pandemic. Employers, however, are also considering the challenges of maintaining culture in the long run, especially as firms bring on new hires.

Organizational culture will be an important consideration in the return to office work. There are shifting expectations and work norms for individuals that come along with remote work, especially roles that have been traditionally conducted 'face-to-face.' While the convenience of changing meetings with the click of a mouse, for instance, may have real productivity value for organizations, this sort of insidious efficiency has real costs for employees who find themselves fixed to a single spot in a steady stream of meetings. Beyond the toll on individuals, the diminished likelihood of encountering anyone outside of scheduled meetings has a hard-to-quantify, yet still important opportunity cost, associated with the lack of informal networking, both within and between organizations.

CONSUMER SPENDING & RETAIL ECONOMY

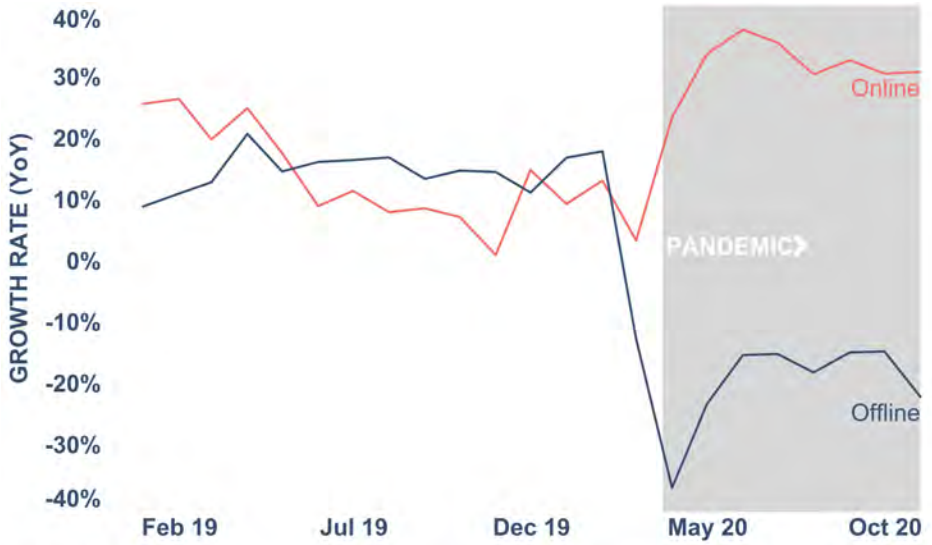
Leading into 2020, Central Ohio was experiencing growth in commercial development across many categories. Commercial real estate development was trending toward high quality office space, hospitality, and high-quality 'lifestyle' mixed-use development with retail and amenities supporting diverse pools of customers—both residential and worker populations, as well as tourists and other visitors. Before the pandemic, pressure on single-use brick and mortar retail was mounting from e-commerce and apparent shifts in consumer preferences.

The pandemic added to the pressure from e-commerce on all retail, and especially traditional, aging brick and mortar retail styles like indoor malls and strip retail. In-store spending, also referred to as "offline" spending, took a major hit beginning with the stay-at-home orders in March 2020. Growth in online shopping persisted even as establishments began to reopen. Offline spending has declined locally by anywhere from about 15% to 40% each month. Meanwhile, online spending has grown consistently by more than 30% each month since May 2020 (Figure 3).

Beyond the acceleration of e-commerce, overall spending was down through 2020. In the state of Ohio, spending in middle- and especially high-income ZIP codes took much longer to rebound. Evidenced by the sectors with the greatest spending declines, high- and middle-income households are more likely to include office workers, which led to deeper cuts in overhead spending for households with the ability to work from home, paired with greater reductions to discretionary spending on recreation, leisure, and travel (Figure 4).

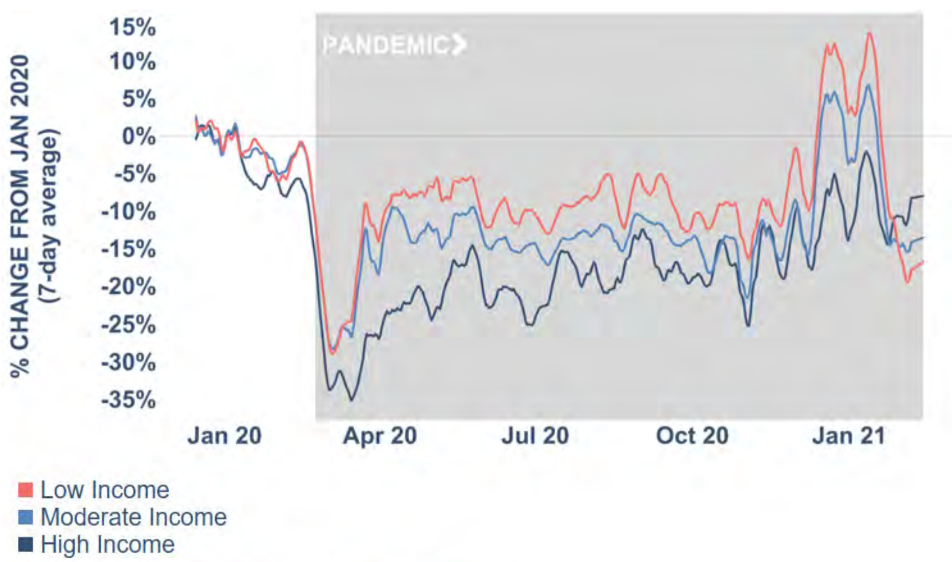
Conversely, low-wage earners are less likely to have remote work options and have less discretionary income, resulting in limited opportunity to reduce spending. In fact, Ohioans in low-income ZIP codes experienced a modest increase in household spending, which might be attributable to costs associated with seeking new employment, navigating the changing availability of resources like childcare and transportation, and to federal interventions like recovery checks and increased unemployment benefits.[6,7]

Figure 3. Online v. Offline Consumer Spending (Columbus MSA)
2019-2020, Weekly



SOURCE : JP Morgan Chase Local Commerce Data Series

Figure 4. Consumer Spending by Income (Ohio)
2020-2021, Daily



SOURCE : Affinity (via Economic Tracker)

Figure 5. Retail Sales by Industry
United States
2019 & 2020 Annual Comparison

SOURCE: U.S. Census Bureau Monthly Retail Sales

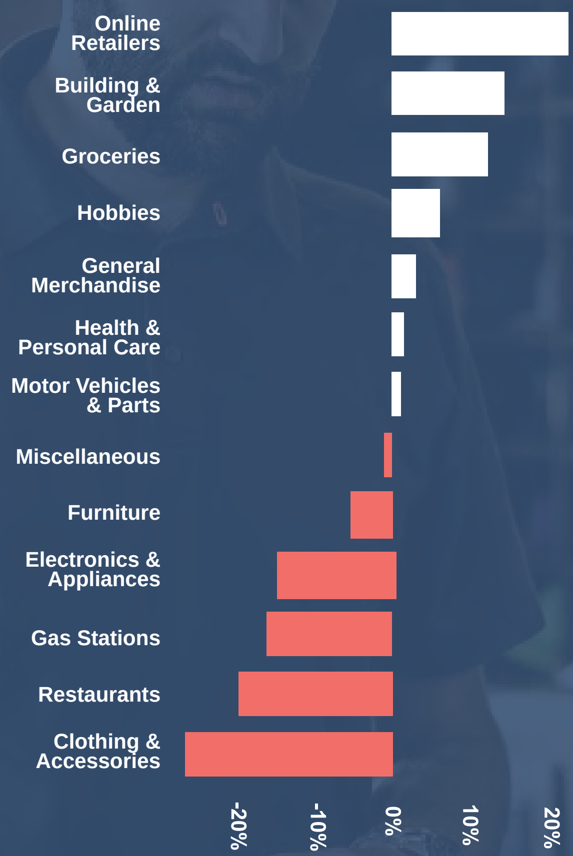
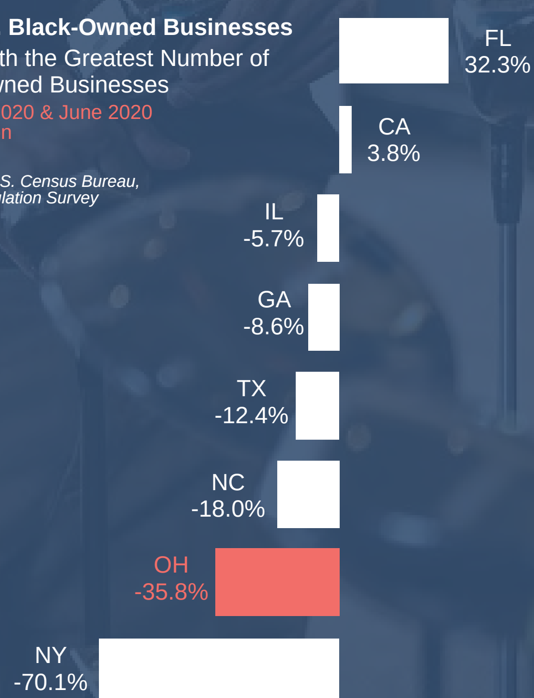


Figure 6. Black-Owned Businesses
States with the Greatest Number of Black-Owned Businesses
February 2020 & June 2020 Comparison

SOURCE: U.S. Census Bureau, Current Population Survey



With the second round of federal stimulus payments, along with vaccine rollouts beginning in early 2021, spending began showing modest gains across income levels. As the vaccine rollout progresses, consumers with unspent discretionary spending budgets may react with more pronounced increases in overall spending in the coming year in sectors that are, by definition, offline (e.g., recreation, leisure, and travel). Other types of spending that support office employees' in-person work (e.g., fuel, clothing, and personal care) are likely to rebound dependently, and therefore concurrently, with employer decisions to return to in-person work.

While no regionwide neighborhood-level data analysis has been completed to demonstrate, there is strong anecdotal evidence to support that neighborhood retail economies were most impacted in places that rely on daytime worker populations or recreational and nightlife attractions, notably downtown Columbus. Neighborhoods with a strong local resident customer base, and especially those with more modern-style mixed-use retail have remained more stable. The rebound of worker-dependent neighborhood economies will depend upon vaccine rollout and patterns of employer decisions to return to in-person work (Figure 5).

According to a national study by the Federal Reserve Bank of New York, evidence suggests a greater impact on Black-owned businesses, including small retailers.[8] According to the study, these businesses tend to be in majority-Black neighborhoods, which were also among those hit hardest by COVID-19 illness. The study cites structural reasons for the disparate impacts on Black-owned businesses, including lack of wealth and weak banking relationships. In the State of Ohio, Black business ownership fell 35% from February to June 2020 (Figure 6).

By the end of the third quarter 2020, the Columbus retail commercial market experienced twelve-month negative net absorption of 264,000 square feet. This began to rebound with some positive gains in the fourth quarter. The surplus in retail space will impact new capital investments as existing retail rebounds. The cadence of this rebound depends on a few key factors – recovery of overall consumer spending, vaccine rollout, and the rate of return to in-person work – and will vary from neighborhood to neighborhood.

LOGISTICS & SUPPLY CHAIN

Ohio relies on overseas production of key commodities including oil, manufacturing components (e.g., vehicle components, metals), health care necessities (e.g., pharmaceuticals, medical supplies) and direct-to-consumer products (e.g., personal care items, computers).[9] For years, China had been the number one country of origin for imported goods into Ohio; however, changes in global trade policies were beginning to increase diversification of import origins, even before the pandemic. By 2019, Canada replaced China as the leading country of origin for imports to Ohio (Figure 7).

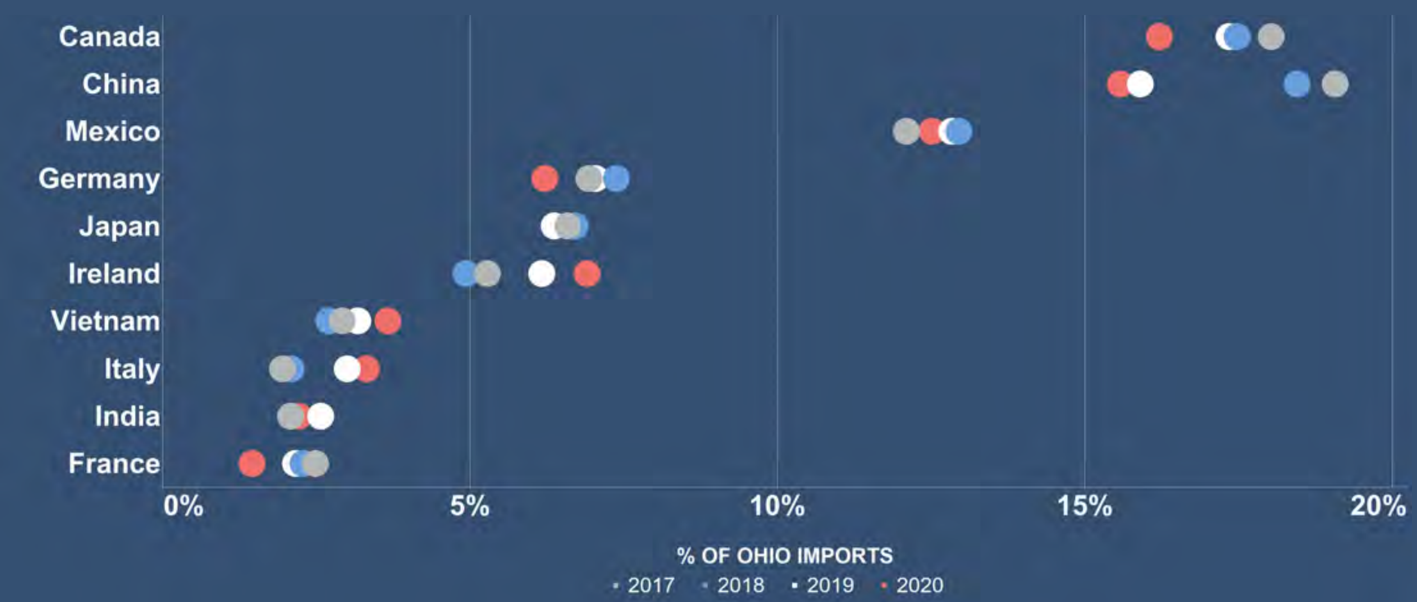
Nationally, the overall dollar amount of international imports was increasing, pre-pandemic, fueled in part by growing e-commerce. In the United States, the e-commerce retail sales market quadrupled from 2010 to early 2020—from $40 billion (about $120 per person in the US) to $160 billion (about $490 per person in the US). When the pandemic hit, e-commerce sales jumped over 30% in a single quarter to $210 billion (about $650 per person in the US). Locally, non-store retailer sales similarly jumped 30%, marking a sudden acceleration in a long, but previously gradual upward trend.[10]

Whether from offshore suppliers or domestic, the abrupt increase in e-commerce demand, sudden global production slowdowns, and shifting logistics patterns catalyzed some dramatic shifts for businesses, and the public resources that support transportation and logistics.

For instance, commercial air cargo comes through both Rickenbacker International Airport and John Glenn International Airport. Before the pandemic, half of global air freight capacity was within the bellies of passenger planes, particularly international routes. When international passenger travel came to a halt with pandemic restrictions and reduced business demand, cargo capacity was significantly reduced. As a result, cargo prices went up and cargo activity shifted. Some passenger aircraft were modified to handle cargo exclusively. For the last half of 2020, these converted aircraft were the predominant type of freighter seen at Rickenbacker.

Some of the earliest signs of the pandemic's impact became evident in January and February 2020 as air cargo from Asia nearly ceased when factories shutdown. However, when factories reopened in Asia, including production facilities for Personal Protective Equipment (PPE), demand surged for air cargo. Rickenbacker was one of the first dedicated airports for Federal Emergency Management Agency relief flights to bring PPE supplies into the country.

Figure 7. Ohio Commodity Imports
Top 10 Countries of Origin
2017 - 2020, Annual



SOURCE : U.S. Census International Trade Data

After the PPE supply chain had stabilized, consumer spending began to rebound. Computers, office furniture, and the like filled cargo flights. A huge backlog of consumer products were then coming via air instead of ocean to meet demand. Ocean capacity has also been backlogged because of the rapid shift from shutdown to high production of a variety of goods produced offshore. Because assembly factories have been waiting for parts produced offshore, businesses have accelerated delivery and shipped more components and goods via air (Figure 8).

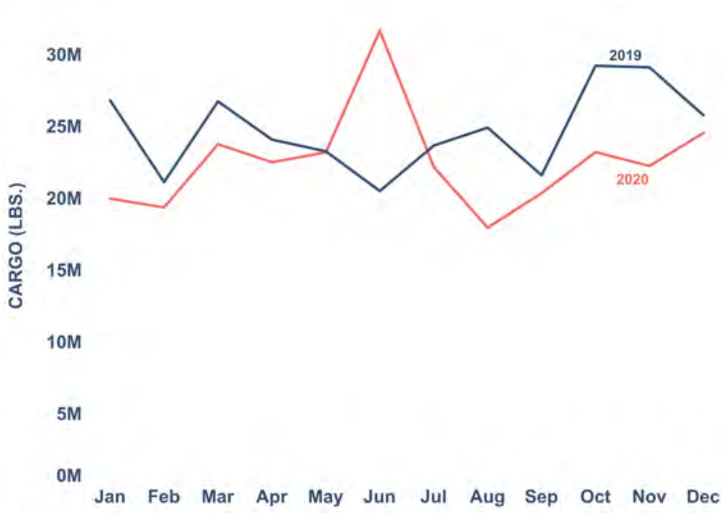
“The world is going through a reimagining of supply chain resiliency,” said one interviewee from the Columbus Regional Airport Authority. Demand for warehouse space, the interviewee suggests, has increased because US companies want more inventory stateside to avoid goods being stuck overseas. Various industries are considering re-shoring more supplies, especially medical supplies.

Indeed, industrial real estate has reflected the increased demand for warehouse space. According to NAI Ohio Equities, 2020 saw 3.3 million square feet of positive net absorption for industrial real estate (which includes warehouse and manufacturing). Industrial construction has also seen record-breaking activity. In 2020, 11.2 million square feet of industrial space was added, far above any year in the past decade (Figure 9). Partly, this reflects the e-commerce boom. According to NAI, 20% of industrial real estate activity is from Amazon distribution facility lease activity alone. It also may reflect businesses seeking to stockpile resources onshore to avoid supply chain pinch points.[1]

Whether diversifying supply chain sources, importing and storing essential supplies in greater volumes locally, or exploring local manufacturing options, there will be important conversations in the coming years between the private and public sectors about employer needs, and the impacts on Central Ohio land use, resident employment opportunities, and transportation systems.

Figure 8. Air Cargo

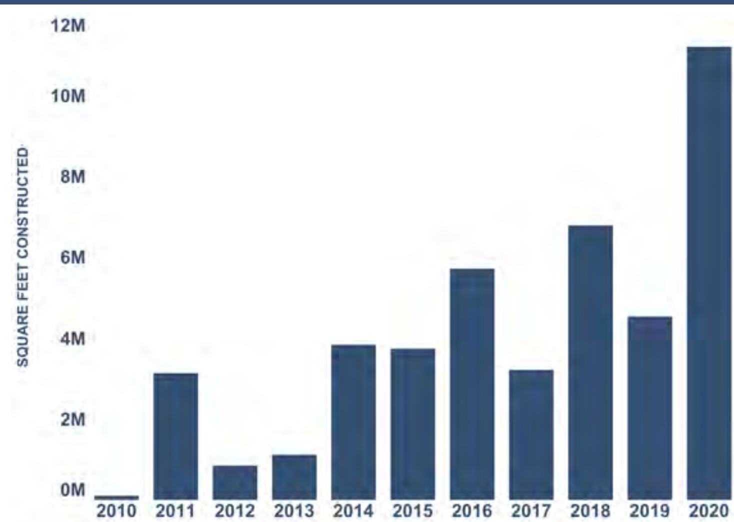
Rickenbacker International & John Glenn International Airports
2019 - 2020, Monthly



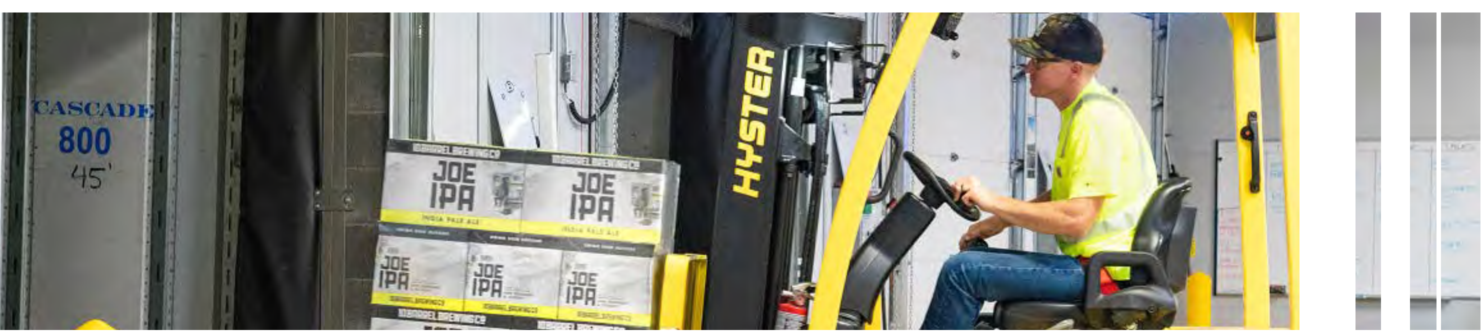
SOURCE : Columbus Regional Airport Authority

Figure 9. Industrial Square Feet Completed

Columbus MSA
2010 - 2020, Annual



SOURCE : Jones Lang LaSalle (via OneColumbus)



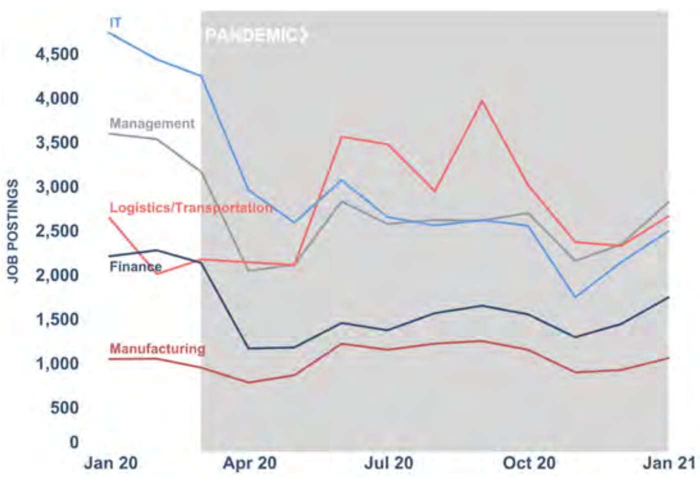
WORKFORCE SHORTAGES

Workforce shortages were a key concern reported by employers before the pandemic. In the years following the Great Recession, Columbus had experienced a gradual but steady increase in the region's labor force. Despite the expanding labor force, employers reported challenges finding workers with the skillsets to match vacant positions.

The pandemic had massive impacts on employment (discussed in detail in the Employment & Small Business brief), along with a significant drop in hiring. By the week ending on May 8, 2020, there were 50% fewer job postings than in January of the same year. By late February of 2021, overall hiring was still 12% lower than in January 2020. Broken down by the educational requirements for vacancies, however, those with lower educational requirements rebounded more quickly, with a few distinct spikes in postings. The greatest of these spikes was in late June 2020, when unfilled vacancies with minimal educational requirements were 43% higher than they were at the start of the year. These positions are reflective of a surge in demand for workers in logistics and transportation, at least partly driven by the surge in e-commerce (Figures 10 & 11).

Figure 10. Job Postings by Industry

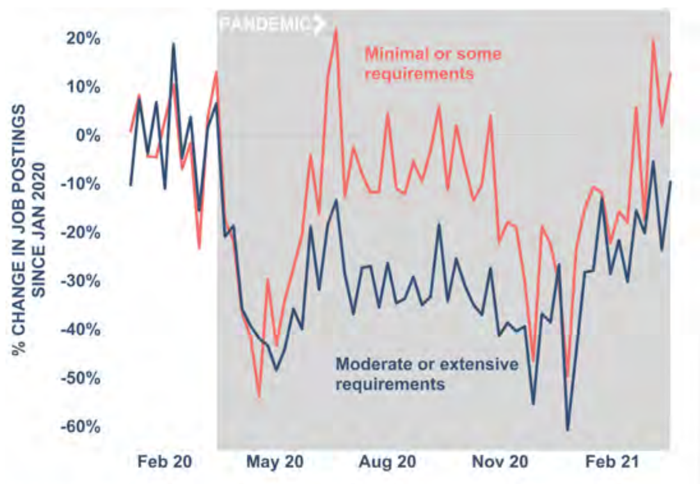
Columbus MSA
2020 - 2021, Monthly



SOURCE : Burning Glass (via OneColumbus)

Figure 11. Job Postings by Education Requirements

Columbus MSA
2020 - 2021, Weekly



SOURCE : Burning Glass (via Opportunity Insights Economic Tracker)

Figure 12. Labor Force

Columbus MSA
2010 - 2021, Monthly

SOURCE : U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (Smoothed, Seasonally Adjusted)

With high unemployment, the workforce challenges employers are experiencing seem almost contradictory. Based on conversations between One Columbus staff and Central Ohio employers, staff turnover is a big issue, as employees deal with childcare and transportation issues. Many employers are increasing wages, which has increased their geographic reach—employees are willing to travel farther for higher wages—but they are still struggling to hire and retain, even temporary workers.

Local employers' experiences mirror a national trend — a major drop in labor force participation that is slow to recover to previous levels. After years of steady growth in the region's labor force, March 2020 saw a 5% decline in a single month. Recovery of the labor force has been slow and uneven (Figure 12). Nationally, the data suggests that dropping out of the labor force is more likely to affect households with children, women, workers without a college degree, and Black and Latinx workers.[12] Barriers also exist for office workers or families conducting remote school who live in locations with poor or no broadband access (an issue discussed in more detail in the Technology & Broadband Access brief).

Another national analysis from the U.S. Census Bureau points out that mothers, especially non-white single mothers, have disproportionately fallen out of the labor force since the pandemic emerged. Mothers are more likely to work in service industry jobs, which were more impacted by the pandemic, and they are more likely to carry the burden of unpaid domestic labor, demands that have been intensified by the reduced availability of childcare and in-person school.[13]

The increasing demand for essential workers reflects an adjustment to a rapidly shifting ecosystem of consumer behavior. This paired with increased barriers to accessing employment for the people who are more likely to fill those positions is a recipe for exacerbated workforce shortages in Central Ohio. Employers are eager to bring in the workforce they need and are taking a range steps to attract and retain staff including increasing wages, expanding job advertising, and considering employee supports around childcare.

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CENTRAL OHIO
COVID-19
POLICY BRIEFS

Regionomics
From Trends to Insight to Action

MID-OHIO REGIONAL
MORPC
PLANNING COMMISSION

EMPLOYMENT & SMALL BUSINESS

Summary

Central Ohio experienced growth in employment that rivaled the national average in the years following the Great Recession. Strong growth overall, however, was not evenly felt across the region. Wages for employment, for instance, diverge widely across industry sectors, which meant that for some, the expense of working was not sufficiently offset by the earnings. This was especially challenging for working parents, with the high cost of childcare added to already distressed budgets.

Overall, Central Ohioans were recovering their personal finances, which translated as more spending and contributions to the economic engines that drive employment growth. Small businesses, however, were struggling to compete with large national or global chains and a growing e-commerce market.

Key Issues

The COVID-19 pandemic initiated a **historic economic collapse,** including a rapid 14% employment decline in a single month. A recovery is in progress but is only partial.

The industry sectors hit hardest by the pandemic shutdowns were primarily those with the lowest average wages. This created **financial peril for un- and underemployed** Central Ohioans, especially those with already low earnings.

At the nexus of small business and supports for workers, the pandemic impact on childcare centers has the potential to create greater workforce challenges as **childcare access and affordability** are compromised.

The COVID-19 shutdowns prompted a jarring **collapse in consumer confidence**. This, paired with reduced consumer spending, has implications on overall growth of the economy.

Decreased consumer spending and weak confidence across the board created **threats to an already weak small business environment**. Small business closures, still a threat, will leave an indelible mark on both the region's economy and communities.

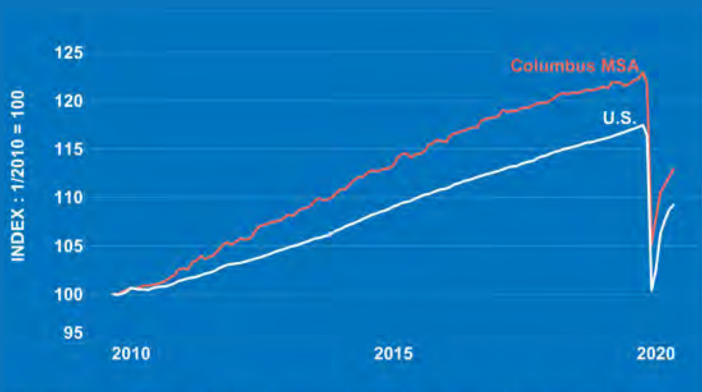
RECOVERY FROM HISTORIC EMPLOYMENT COLLAPSE

Central Ohio employment grew by 23% between December 2009 and February 2020 – totaling 214,400 jobs, nearly one-third greater than the national average. This above-average growth was driven by key sectors including construction, finance and insurance, and healthcare.

Employment in the Columbus metro suffered a historic decline during the March and April 2020 lockdown. The employment collapse brought the region a total loss of 160,300 jobs (14.2%) (Figure 1). Leading this loss was leisure and hospitality – arts, entertainment, recreation, hotels, restaurants, and other food services. This sector lost nearly half its employment over that two-month span. In the Columbus MSA, leisure and hospitality accounted for 10% of total employment in February 2020, but its loss represented more than one-third of the total employment decline (Figure 2).

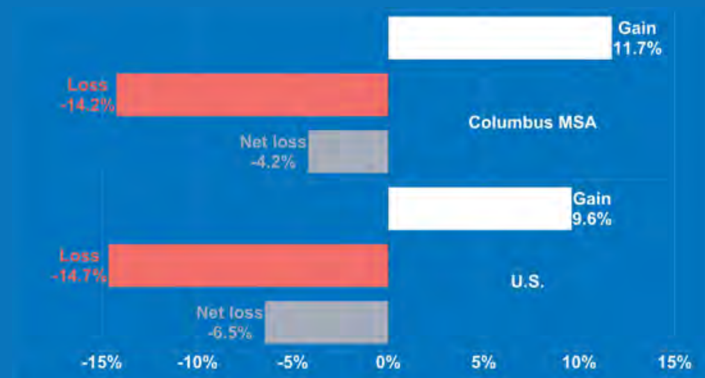
Although growth in succeeding months has been significant, employment as of January 2021 remained 47,000 (4.2%) below its February 2020 peak. While Central Ohio jobs have recovered faster than the country as a whole – U.S. employment in January 2021 remained 6.5% below February 2020 – it will still be many months before job totals return to their pre-pandemic levels.

Figure 1. Total Employment
Columbus MSA & US
2010-2020, Monthly



SOURCE : U.S. Bureau of Labor Statistics Current Employment Statistics, Seasonal adjustment of Columbus MSA employment by Regionomics

Figure 2. Employment Gain, Loss, & Net Change
Columbus MSA & US
Apr 2020-Jan 2021, Comparison



SOURCE : U.S. Bureau of Labor Statistics Current Employment Statistics, Seasonal adjustment of Columbus MSA employment by Regionomics

Nationally, no primary sector has recovered all of the jobs lost last March and April. Locally, the Regionomics® seasonally adjusted employment estimates show three sectors above their year-ago levels: construction, manufacturing, and transportation and utilities. January financial activities employment is equal to its February 2020 level. However, employment in the leisure and hospitality sector remains 26,000 (23%) lower than before the pandemic – a net loss comparable to the national average.

The Regionomics 2021 Columbus Economic Forecast predicts a year-over-year gain of 26,800 jobs (2.6%). That would be the largest gain since 2012, but it will leave December 2021 employment well below its February 2020 peak. This is consistent with national forecasts. The quarterly surveys of economists by the Federal Reserve Bank of Philadelphia and the National Association for Business Economics (NABE) both expect strengthening U.S. employment growth over the year, but neither panel expects a full employment recovery this year. Among the economists in the NABE survey, 65% do not expect this to occur until 2023 or later.

A related concern is the effect of long-term unemployment on workforce readiness and workers themselves. As discussed in a recent *Harvard Business Review* article,[1] the long-term unemployed lose skills and the contacts who could help them regain employment, and suffer a range of psychological impacts. While no local statistics measuring unemployment duration exist, the number of people nationwide unemployed for more than 27 weeks has quadrupled from its year-ago level to more than 4 million. The share of all unemployed who have been without work for 27 weeks or more is now 41.5%, more than double the share from before the pandemic. This impact has fallen disproportionally on women: the percentage of women who are in the labor force is at its lowest level since 1987. Rather than the hoped for "V-shaped" recovery the disparities in long-term unemployment point to the reality of a "K-shaped" recovery, with many in the region experiencing more lasting economic struggles.

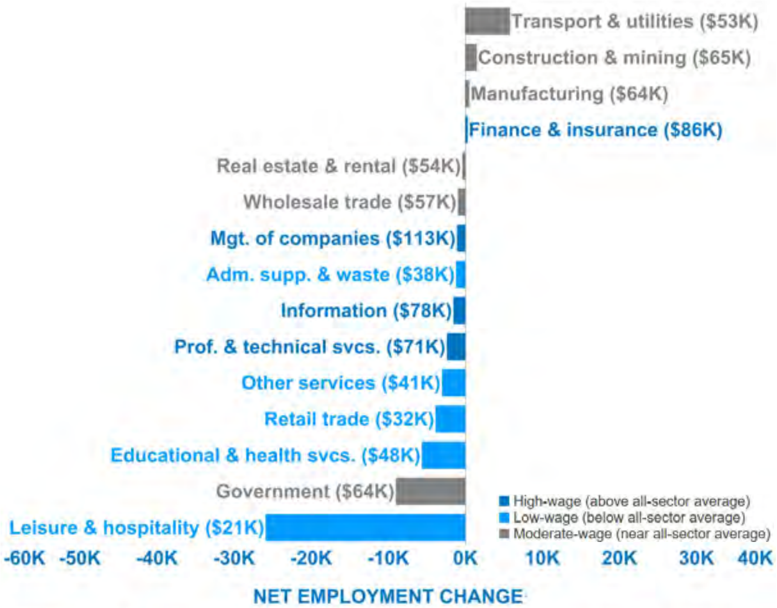
Some of the job dislocations from the pandemic will be permanent. Two-thirds of the economists in the NABE panel expect up to 5% of jobs to disappear permanently, while one-quarter expect the impact to be even larger – up to 15%. There will be a need for significant investment in retraining to address this dislocation and return these workers to the labor force.

FINANCIAL PERIL FOR UN- & UNDEREMPLOYED

Pandemic-related job losses have disproportionately impacted workers in lower-wage industry sectors, particularly leisure and hospitality (the arts, recreation, hotels, and restaurants), and retail trade. Of the 47,100 net jobs lost through January 2021 in the Columbus MSA, 25,900 are in leisure and 4,900 are in wholesale and retail. These sectors account for two-thirds of the total jobs lost. Wages in leisure and hospitality in particular are the lowest of any sector – an average of $21,463 in the Columbus MSA in 2019. Low-wage industry sectors also include administrative support and waste services (temporary staffing is included in this sector), and other services. These are the most “at-risk industry sectors”, and have suffered a combined net loss of 34,000, 72% of all jobs lost (Figure 3).

Figure 3. Net Employment Change by Industry

(Average Annual Wage)
Columbus MSA
Feb 2020-Jan 2021, Comparison



SOURCE : U.S. Bureau of Labor Statistics Current Employment Statistics; Quarterly Census of Employment and Wages

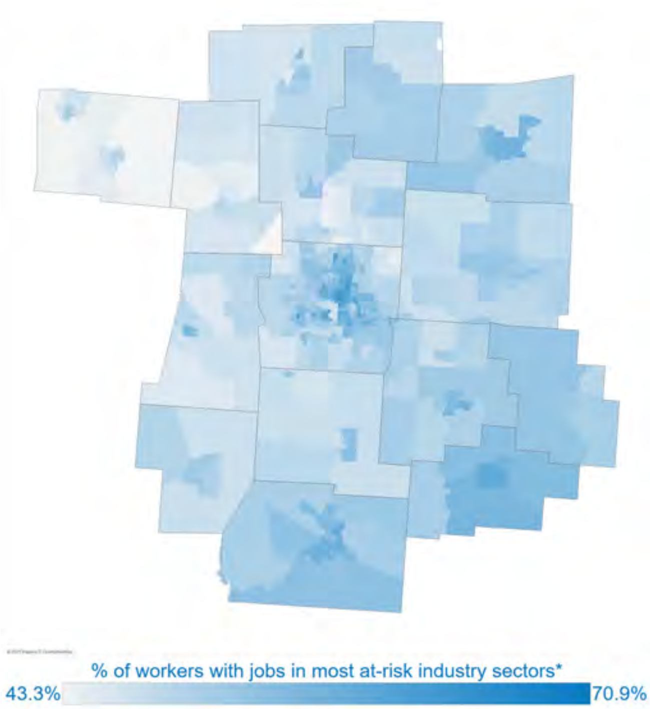
Low-income workers are more vulnerable to the impacts of job loss. A 2019 Federal Reserve study found that nearly 40% of households nationwide were not equipped to handle a sudden $400 expense – let alone sudden unemployment. Housing is a particular vulnerability. Among households earning less than $75,000 annually, 46% in 2019 met the U.S. Department of Housing and Urban Development definition for “housing cost burdened” – paying 30% or more of their income in housing costs. One in five households earning less than $75,000 a year in the Columbus MSA paid 50% or more of their income in rent or mortgages.[2,3]

In Central Ohio, low-wage workers in at-risk industry sectors live in high concentrations in many of the region’s rural county seats, in parts of Appalachia where ecotourism is a dominant industry (e.g., Perry and Hocking Counties), and in areas of Franklin County with higher concentrations of Black and brown residents (Figure 4). These communities will be places to note. High-income workers have more or less rebounded employment since the start of the pandemic, but middle-income workers (10% down since January 2020), and especially low-income workers (29% down since January 2020) are still struggling to recover (Figure 5).

Augmented unemployment benefits have provided a lifeline for struggling households, but enhanced supports are only temporary and may fall short of meeting all household expenses. Discussed in greater detail in the Social Sector brief, survey data from the U.S. Census Bureau suggests that one out of every three adults in Ohio are having a somewhat or very difficult time keeping up with usual household expenses. These Ohioans are more likely to have experienced loss of employment as a major factor contributing to their difficulty keeping up with bills. They are more reliant on state-run assistance programs (e.g., Supplemental Nutritional Assistance Program), and they are more likely paying bills by borrowing money from friends and family, using credit cards or loans, using savings, or selling assets.

New claims for unemployment surged in April 2020, tapering off throughout the rest of the year, but remaining at higher rates than before the pandemic. More recently, Ohio’s unemployment claims system has become the target of significant fraud. Initial claims more than tripled during the week ended February 6, 2021, to a level rivaling that during the worst of the job loss in April 2020. The need to subject all claims to greater scrutiny increases system costs and could lead to delays in the payment of legitimate claimants’ benefits, which would put extra strain on households’ budgets (Figure 6).

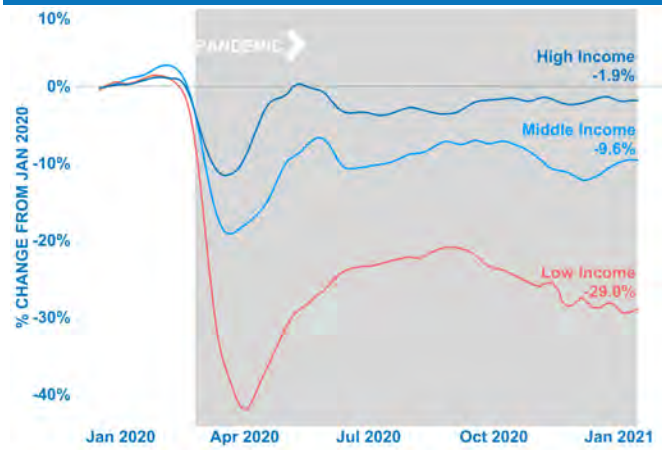
Figure 4. Home Locations of Workers in Most At-Risk Industry Sectors
Central Ohio Census Tracts, 2017



SOURCE : Center for Economic Studies LEHD Origin-Destination Employment Statistics (LODES)

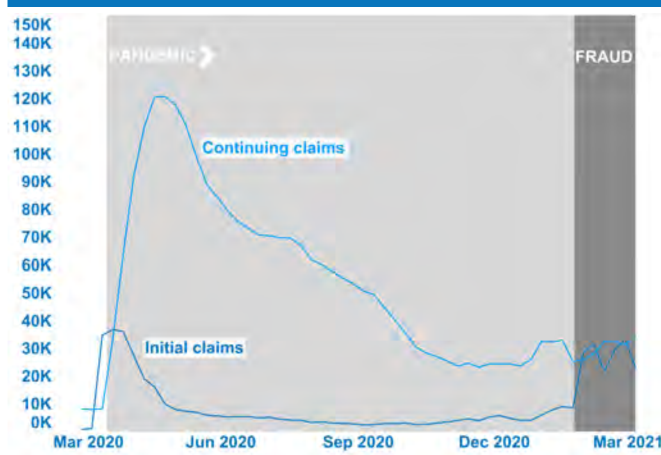
* Retail trade; Accomodation & food services; Administrative & support & waste management & remediation services; Other services; Education; and Healthcare

Figure 5. Employment by Income
Columbus MSA
Jan 2020-Feb 2021, Daily



SOURCE : Earnin, Intuit, Kronos, Paychex (via Economic Tracker)

Figure 6. Unemployment Claims
Columbus MSA
Mar 2020-Mar 2021, Weekly



SOURCE : Ohio Department of Job and Family Services

CHILDCARE ACCESS & AFFORDABILITY

Affordability of childcare poses a difficult challenge for families. The Massachusetts Institute of Technology's Living Wage Calculator estimates the unsubsidized annual cost of childcare at $9,714 per year per child.[4] These costs are sometimes subsidized for lower-income households, but childcare costs can be a substantial burden even for households with moderate income.

A related problem is the benefits cliff: the fact that the childcare subsidy disappears at a certain household income level that is often well below what is needed to afford the unsubsidized cost. This can cause a worker facing the loss of the childcare benefit to make the economically rational decision to forgo a promotion or additional work hours. Childcare access and affordability would remove a key barrier to entry into the labor force and help to stabilize household finances for many Central Ohio families.

Childcare access is also challenging due to supply limitations—childcare centers are a business model that operates on tight margins. The cost of operating a childcare facility and the ability of clients to pay, including their access to subsidies, lead to different service levels, which manifests an inequity in quality of early learning experiences. Slots in accredited, highly rated early childhood education centers, as rated by Ohio's Step Up to Quality program, are both expensive and in high demand. These inequities were already present before the pandemic, but the increased costs and revenue losses created by COVID-19 are expected to intensify these disparities.

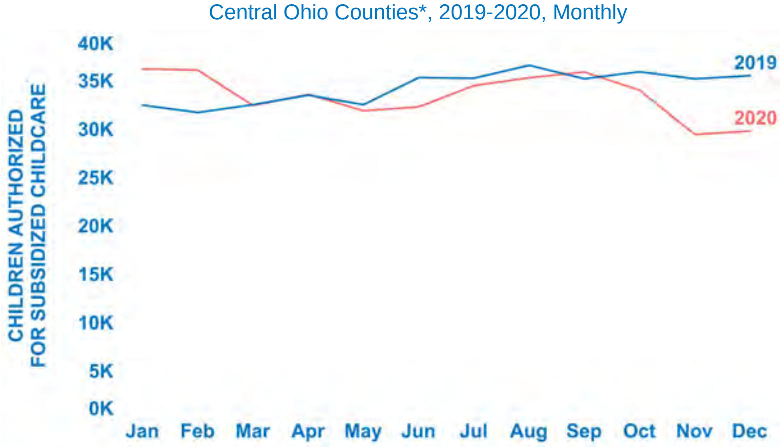
One year after the pandemic shutdowns began, 6% of unemployed workers nationally reported that their primary reason for not working was caring for children who were not in school or daycare.[5] Locally, the number of children authorized for childcare subsidies has remained consistently lower than 2019 numbers since the pandemic shutdowns began in March 2020 (Figure 7). Neither the national nor local data tell a complete story about the reasons why families have some workers focused on childcare responsibilities in lieu of work. For some families, there is a likely connection to childcare centers scaling back enrollment or closing entirely, or families' concerns about health or inability to find work.

Childcare centers' financial stability relies on full enrollment, which has been prohibited during the pandemic. The initial stay-at-home order closed all centers in the spring, which was a large blow to financial viability. Some workers who were allowed to work from home provided their own childcare, and others relied on informal arrangements.

Estimates of the impact of these stresses on the number and employment of childcare centers in the Columbus MSA are not yet available, but a survey of local centers in March 2020 by Action for Children paints a dire picture.[6] One in six childcare centers remained closed at that time, as a result of sustained low enrollment and increased costs for personal protective equipment (PPE) and cleaning. At the time, 30% of still-open providers anticipated closing within three months without immediate support, and half of providers reported closing within 6 months (Figure 8). The loss of even a fraction of these at-risk providers, especially those rated as high-quality, will create limitations on the number of available slots that will continue after the pandemic. Furthermore, 49% of respondents in the Action for Children survey had already or planned to increase tuition. With the already high cost of childcare, this places additional strain on Central Ohio families, especially those with lower incomes.

Figure 7. Subsidized Childcare

Central Ohio Counties*, 2019-2020, Monthly

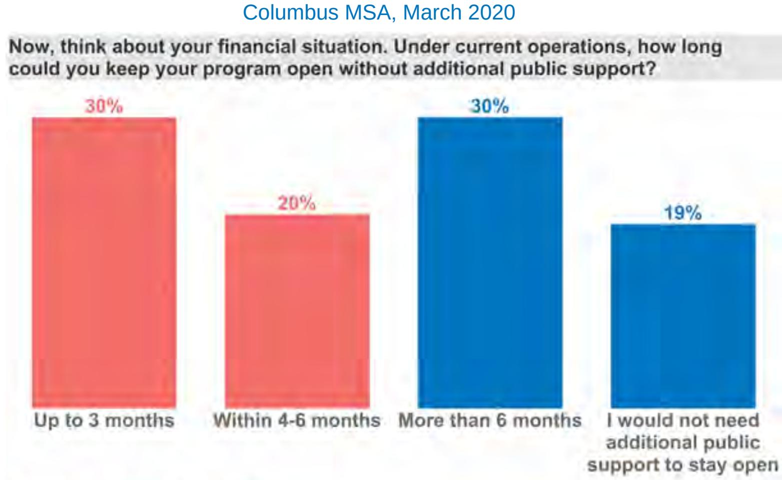


SOURCE : Ohio Department of Job and Family Services

** Delaware, Fairfield, Fayette, Franklin, Knox, Licking, Logan, Madison, Marion, Morrow, Perry, Pickaway & Union counties*

Figure 8. Childcare Center Survey

Columbus MSA, March 2020



SOURCE : Action for Children

COLLAPSE IN CONSUMER CONFIDENCE

Strong consumer confidence is essential for strong, sustained growth in the economy. Consumer spending comprises 70% of gross domestic product (GDP), if consumers lack confidence, they will not spend, and GDP growth will be severely limited. The University of Michigan's Consumer Sentiment Index, which had been at 20-year highs before the pandemic, fell to levels rivaling those immediately following the 2007-2009 recession as the pandemic took hold (Figure 9). Although the reopening of the economy and the emergence of therapies and vaccines has had a positive impact on the index, it remains depressed.

The lack of confidence is evident in the personal savings rate, which rose to historic highs, spiking to 33.7% during the lockdown. By the fall of 2020, as consumer spending began to slowly increase and overseas production and logistics challenges subsided, the savings rate fell to the mid-teens, a rate that still rivaled levels last seen in the early 1970s. In January 2021, the rate again increased to 20.5% as economic stimulus payments were hitting households' bank accounts (Figure 10). These savings represent amounts that households are not devoting to consumption, which negatively impacts GDP growth. Consumer confidence must improve before the savings rate can return to pre-pandemic levels.

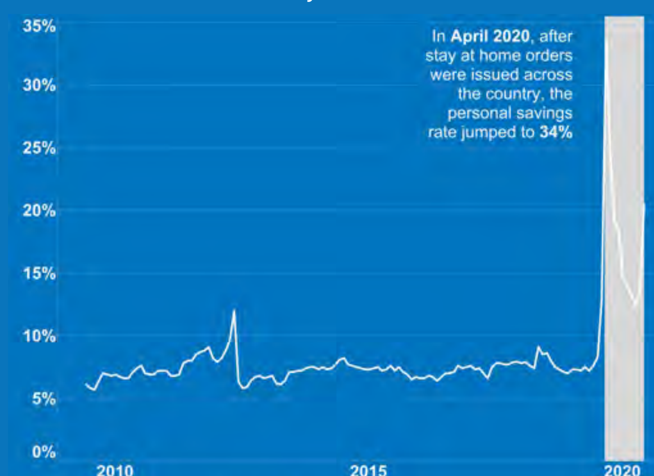
Discussed in more detail in the Economic and Community Development brief, data obtained from Opportunity Insights' Economic Tracker shows a clear divergence in consumer spending by income.[7] Lower income households are keeping up with normal spending patterns, for the most part, as their budgets tend to have fewer discretionary items that can be eliminated; they are also less likely to be working from home, which makes it difficult to eliminate some consumer spending needs. Middle- and high-income households saw the greatest spending reductions, suggesting that these earners are enjoying increased personal savings, while making fewer contributions to GDP growth.

The economy and public health are linked in unprecedented ways, and the course of the virus and vaccinations is critically important to the return of confidence. The flow of positive news about the declining virus positivity rate, the increasing number of vaccinations, and the responsible reopening of sports and entertainment venues to a limited number of patrons will have a positive impact. However, there is an unknown number of individuals who are hesitant to return to these venues. Perhaps being vaccinated will reduce their concerns and thus making vaccinations widely and easily available will help restore confidence. Pent up demand for travel and tourism (discussed in the Transportation brief) will also have positive effects on GDP growth. The successful return of these economic engines will be contingent on the publicizing of and adherence to public health guidelines, which will reduce the positivity rate and keep the economy reopening.

Figure 9. Consumer Sentiment
United States
Jan 2010-Jan 2021, Monthly

SOURCE : University of Michigan Surveys of Consumers

Figure 10. Personal Savings Rate
United States
Jan 2010-Jan 2021, Monthly



SOURCE : U.S. Bureau of Economic Analysis

THREATS TO AN ALREADY WEAK SMALL BUSINESS ENVIRONMENT

Central Ohio's rate of self-employment, and concentration and growth of small businesses has been far below average for years (Figure 11). Among the 100 largest MSAs in the U.S., Columbus in 2019 ranked 82nd in the percentage of workers who are self-employed. Other statistics are available less regularly, but the rankings are stable. Columbus ranked 86th in the share of all businesses that are small (fewer than 20 employees) in 2015 and 74th in the small business birthrate that year.

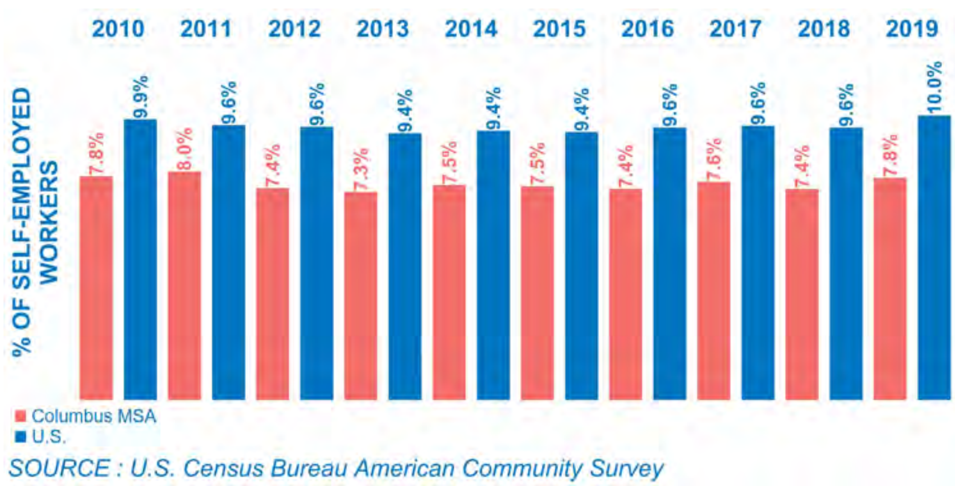
Statistics on the loss of small businesses resulting from the economic stresses of the pandemic are not yet available, but evidence suggests that a large number of small businesses are failing, or near failure. Discussed further in the Economic and Community Development brief, these challenges are felt more acutely by businesses owned by people of color. A national survey of small businesses suggests that "the share of firms that experienced financial challenges in the prior 12 months rose from 66% to 80% between 2019 and 2020." [8] Furthermore, 90% of firms surveyed used some form of emergency financial relief, predominately from the Paycheck Protection Program (PPP). Of the 64% of small businesses that said they would apply for more financial support if available, 39% said their business would not survive unless business returned to pre-pandemic levels, or more relief became available.

The new emergency relief package, however, offers much less aid to small businesses than previous rounds -- $50 billion of the $1.9 trillion plan, or only 2%. Of that total, $29 billion is targeted to aid hard-hit restaurants and bars, and $1.25 billion is designated for live-event operators.[8] Still, the economic stimulus provided to households will benefit surviving businesses as confidence improves.

A March 2021 survey conducted by the U.S. Census Bureau of existing small businesses suggests that some Columbus metro firms are still operating below capacity and anticipating a long, slow recovery. Although the extent is unknown, by March 2021, some small businesses had already shuttered their operations, and would therefore be excluded from the Census survey. Thirty percent of area small businesses are still operating within a 50% reduction of capacity, and an estimated 40% of small businesses expect the "return to normal" will take at least 6 months. Still, some are anticipating a ramp up of operations, by increasing staffing (40%), increasing marketing (30%), or making a capital expenditure (20%) in the next 6 months. The size of firms and the nature of business matters, but this is unclear in these data.

Local businesses add unique elements to the community. Further, locally owned, locally serving businesses trap spending that flows from chains to distant headquarters, so the spillover benefits of local businesses are greater. Civic Economics has found that locally owned retailers trap an average of $0.48 of every sales dollar for at least one additional round of spending, compared to $0.14 for the typical chain. The Columbus economy's low concentration of small, local businesses already has negative impacts on the economic impact of consumer spending, and the loss of these businesses reduces the impact further.

Figure 11. Self-Employment
Columbus MSA & US
2010-2019, Annual



Local governments can provide aid to these businesses to the extent possible by aggressively promoting the benefits of shopping locally and shopping small, and by reviewing their own bidding and bid selection processes. In some cases, government bid preparation requirements are complex, lengthy, and may shut out small firms. Some governments in the region explicitly award points to bidders within their own jurisdiction, but given the regional benefit of keeping spending local, all governments within the region should consider establishing preferences for local bidders and ensure that bidding requirements are as straightforward as possible.

The same preferences for local purchasing can be adopted by private employers, particularly large anchor institutions. Trade associations and chambers of commerce could work with these companies to find local suppliers that could effectively meet the needs for goods and services that are currently being met by suppliers based outside of the area.

The region's civic technology community is connecting volunteers and local businesses. Can't Stop Columbus has created initiatives that help local businesses launch sites for e-commerce, and help residents find local restaurant options[9] or other small business retailers.[10] There has been a significant shift to online shopping in recent years – a trend that has accelerated during the pandemic. This trend threatens to leave behind businesses that do not have an online presence. In addition to promoting buying locally, local governments should consider supplying resources and funding to assist small businesses, perhaps via the civic technology volunteer community, to develop e-commerce options.

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COVID-19
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THE CITY OF COLUMBUS CITY COUNCIL

MID-OHIO REGIONAL MORPC PLANNING COMMISSION

HOUSING

Summary

The past decade was one of historic growth for Central Ohio, and that growth is expected to continue for the foreseeable future – with the Mid-Ohio Regional Planning Commission (MORPC) projecting the region to have as many as 3 million residents by 2050. Not only is the region growing; it is changing. Increases in both the young adult and 65 and older populations are shifting housing preferences. Furthermore, the highly competitive real estate market and a persistently high poverty rate have led to more vulnerable groups struggling to find housing in neighborhoods of their choice.

The impacts of the COVID-19 pandemic are bifurcated, and housing is a clear demonstration of the "K-shaped" recovery. The slow recovery for some residents magnifies structural challenges that were already present, while the quick recovery for other residents adds pressure to the tight housing market, accelerating price increases overall.

Key Issues

Renter instability magnifies the precarity of housing for low- and middle-income residents in Central Ohio, and the challenges connecting residents to available supports.

Homeowner instability is a slow-moving process, but a suspected fair number of Central Ohio homeowners are underwater with their mortgages.

The housing supply has been further depressed by the pandemic yet **demand for market-rate housing is surging** as some residents adapt to remote work and school or capitalize on increased personal savings and historic low interest rates.

Supply of subsidized housing is suppressed, while demand increases, especially as rapidly increasing market-rate housing prices reduce naturally occurring affordable housing options.

The region's **Continuum of Care** is preparing for an influx of people experiencing homelessness, as residents with sustained income reductions move into increasingly unstable housing.

HOUSING INSTABILITY

Many in the region experienced the last decade as a recovery of personal finances following the Great Recession. In fact, the percentage of residents who are housing cost-burdened has been on the decline, in alignment with national trends. Nonetheless, before the pandemic, 210,000 households in the region were stretching their earnings beyond what is considered sustainable to pay for housing (more than 30% of household income is considered housing cost-burdened), especially among lower earners.

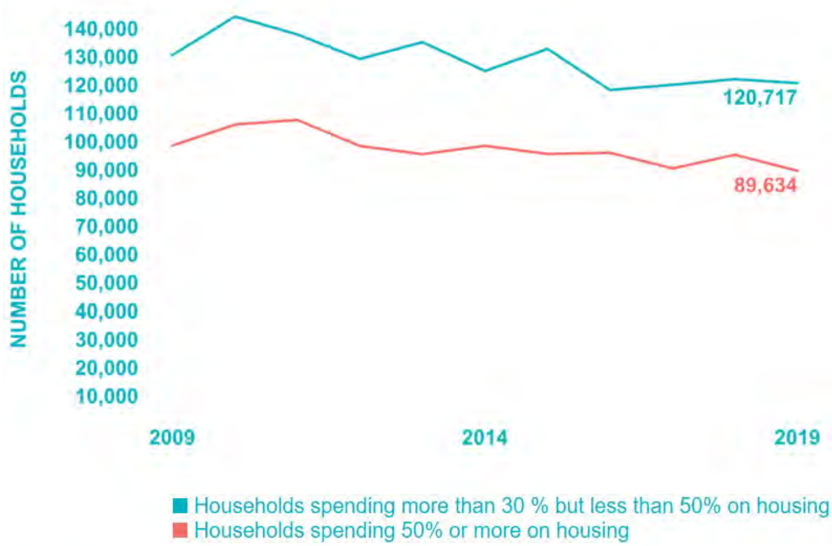
Of those experiencing housing cost burdens, around 90,000 are extremely cost-burdened, spending more than 50% of their incomes on housing costs (Figure 1).

Renter Instability

Many Central Ohio residents experienced a reduction or loss in employment in the pandemic, especially those in industries and occupations that cannot be transitioned to remote work. Job loss is estimated to have the greatest impact among low wage earners. According to one analysis from the Urban Institute, there are significant concentrations of job loss in Central Ohio (nearly 10% of all workers in some Census Tracts) in low income, low opportunity neighborhoods (places with limited access to basic necessities like food, jobs, childcare, and healthcare), with higher concentrations of renters. These are also neighborhoods with the greatest concentration of Black or African American residents (Figure 2).[1]

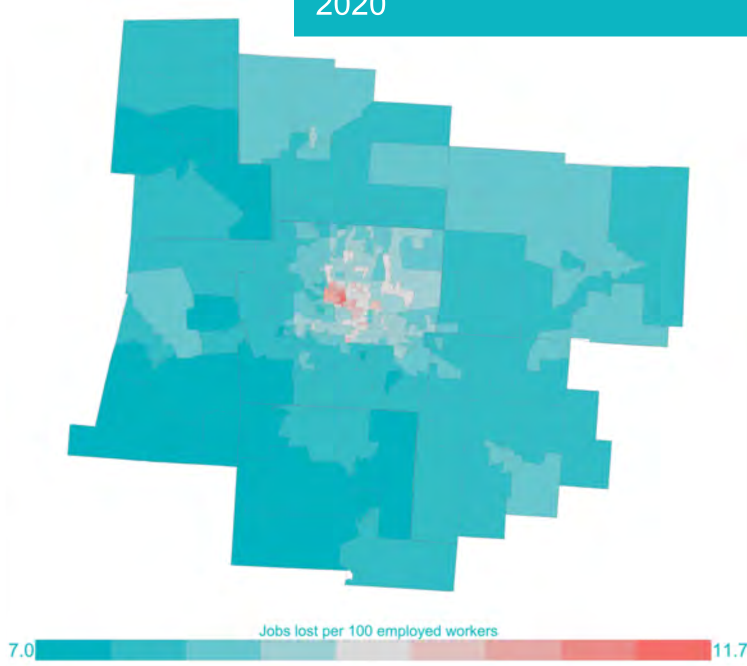
With many households experiencing income reduction or job loss, there is an anticipated impact on these households' ability to pay rent. As a national policy concern, this has prompted the Centers for Disease Control and Prevention to place a moratorium on evictions, if the reason for eviction is a tenant's inability to pay due to COVID-19-related financial hardship.[2] The moratorium on evictions seems to have slowed tenant eviction filings in the courts. From March to October 2020, there were 8,000 eviction filings in Central Ohio, compared with 14,500 total filings in the same period of 2019. While eviction filings are lower in 2020 than in 2019, they generally increased as the year continued (Figure 3).

Figure 1. Cost-burdened Households
(Columbus MSA)
2009-2019, Annual



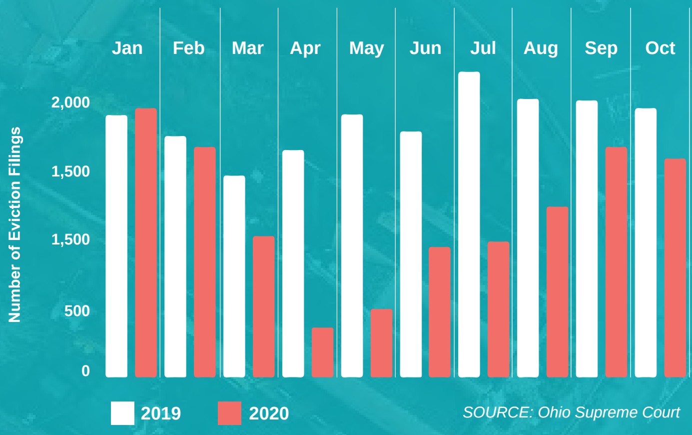
SOURCE : U.S. Census Bureau 1-year American Community Survey

Figure 2. Jobs Loss Estimate
Central Ohio Census Tracts
2020



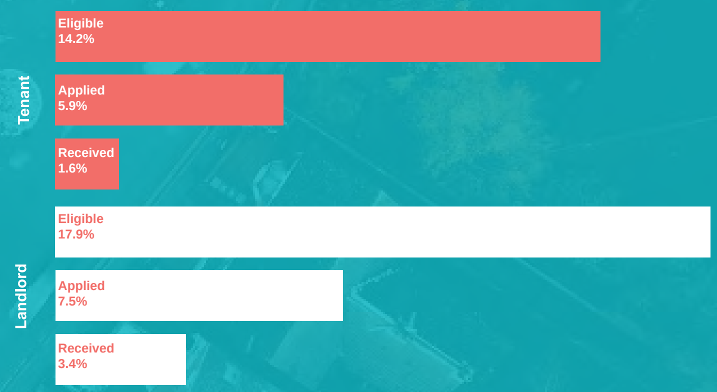
SOURCE : Urban Institute

Figure 3. Eviction Filings
Columbus MSA
2019 & 2020, Monthly



SOURCE: Ohio Supreme Court

Figure 4. Rental Assistance for Tenants & Landlords
US National Survey, February 2021



SOURCE: Avail 2021 Landlord and Tenant Survey (via Urban Institute)

While the moratorium is slowing eviction filings, many Central Ohio residents are accumulating rent debt as they continue to manage their budgets with reduced incomes. According to a survey of households conducted by the US Census Bureau, around 350,000 Ohioans are behind on rent payments, and 280,000 of those reported some loss of income. Of the renter households working to stabilize housing, but still coming up short on rent payments, 53% are Black or African American. For comparison, only 12% of the total population in Ohio is Black or African American. 160,000 respondents in renter households believe it is 'very likely' they will lose their home due to eviction in the next two months. Over 125,000 of those households are Black or African American.[3]

Some residents have opted to change their housing situation altogether, according to interviews with housing experts in the region, either by moving to lower cost housing or "doubling up" housing (moving in with friends or family) to reduce costs. These solutions are less than ideal and can create new hurdles down the road.

Lower cost housing often comes with trade-offs in access to jobs and necessities, housing quality, housing appropriateness (e.g., accessibility features, number of rooms), and safety.[4] Doubling up housing can lead to overcrowding. Experts suggest that overcrowding can have negative impacts on individuals' well-being, especially outcomes for children.[5] As a temporary solution, doubling up housing may create new barriers to housing access including saving up for security deposits, and sometimes multiple months' rent. As an unstable housing arrangement with barriers to independent housing, some researchers suggest that doubled-up housing is a precursor to homelessness.[6]

There may be some property owners or property managers struggling to recoup losses from missed rent payments. Based on interviews with local housing experts, small-scale landlords may change behavior, and that could have negative implications for the availability of naturally occurring affordable housing in Central Ohio.

One study from the Urban Institute looked at a survey of landlords to understand how they are faring with the rent moratorium. In September 2020, 35% of the landlords surveyed did not receive all rent payments, and more than three-quarters of those missed payments were caused by the tenant's inability to pay. Vacancy is also a concern for property owners. In the same survey, one out of five landlords reported increased vacancy. The financial pressure, according to the report, is leading more property owners to consider selling properties. Landlords are also implementing stricter tenant screening practices.[7]

Locally, city funding in the amount of $10.5 million was given to IMPACT Community Action, a nonprofit working to reduce poverty in parts of the Central Ohio region, and other housing partners in Central Ohio for Tenant Based Rental Assistance. While this was important, and saved many residents from losing their homes, many are still unemployed or financially burdened due to COVID-19, which means rent payments are still piling up.

Furthermore, connecting resources to the people who need them is an on-going challenge, magnified by the increased volume of need and the rapid expansion of supports. An Urban Institute report of a February 2021 survey of landlords and tenants suggests that only about half of renters are aware that rental assistance programs exist. Pointedly, even those renters and landlords that are aware of and eligible for rental assistance programs do not always apply (Figure 4).[8]

Homeowner Instability

There are indications that some Central Ohio homeowners may be struggling to keep up with their mortgage and tax payments, but the extent and magnitude of this issue will not be clear for some time. According to the US Census Bureau Household Pulse Survey, there are around 390,000 Ohioans currently behind on their mortgage payments, about 145,000 of which report some loss of income due to the COVID-19 pandemic. Of those, around 50,000 believe they are 'very likely' to lose their home due to foreclosure in the next two months.[3]

Like with evictions, some measures were taken at both the federal and local levels to support homeowners experiencing financial hardship due to COVID-19. For homeowners with federally backed mortgages, a broad program is available for mortgage forbearance.[9] Private lenders are also taking measures to work on flexible mortgage repayment for households struggling with reduced income or health challenges in the pandemic.

According to a study of forbearances by the Mortgage Bankers Association, 5.54% of Americans' mortgage loans were in forbearance in November 2020, up from 0.25% in March 2020.[10, 11]

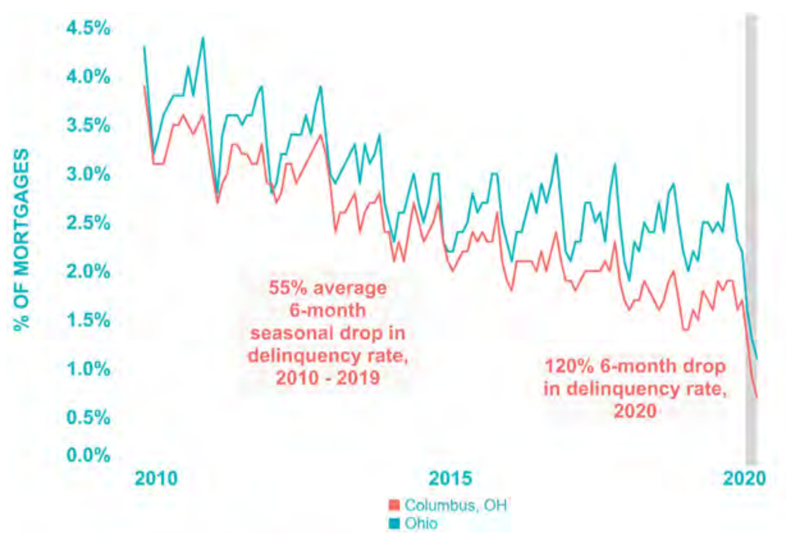
Forbearance allows mortgage-holders to delay payments without penalty and without classifying the loan as delinquent, a condition that can lead to foreclosure. After the onset of the pandemic, and the implementation of programs allowing for forbearance flexibility, the percentage of mortgages between 30- and 89-days delinquent, or past due, dropped sharply compared to the historic trend—a 120% 6-month seasonal decline, compared with an average 55% 6-month seasonal decline observed from 2010 - 2019. Drops were observed both locally and nationally (Figure 5).

While forbearances seem to have prevented some households from falling into delinquency, there is inconsistency across lenders in their terms of repayment of missed payments during the forbearance period. While some lenders are allowing borrowers to tack on the extra payments at the end of the mortgage lifecycle, extending the loan period with no near-term financial burden, others are requiring lump sum repayment of the missed amount, while others will increase monthly payment amounts until the deferred amount is repaid.

According to the Survey of Household Economics and Decisionmaking conducted by the Federal Reserve in July 2020, American homeowners may not be clear about the terms of the forbearance options provided by their lenders. About one-quarter (23%) of borrowers in forbearance do not know what repayment terms their lenders expect when the forbearance period ends, and more than half (54%) have little or no confidence in their ability to pay once the forbearance ends (Figure 6).[12]

Figure 5. Mortgages 30-89 Days Delinquent

Columbus MSA & Ohio
January 2010 - June 2020, Monthly



SOURCE : Consumer Protection Finance Bureau
Shaded area represents pandemic emergency period

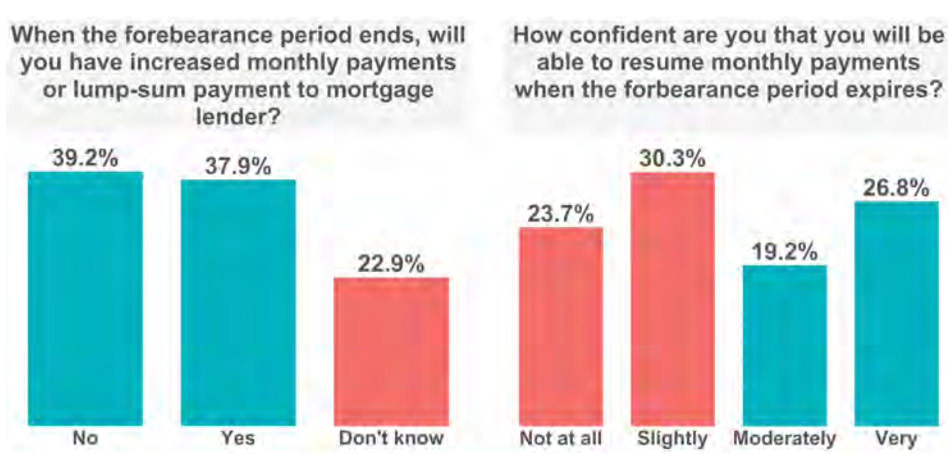


Figure 6. Forbearance Repayment Understanding & Confidence

US National Survey
July 2020

SOURCE: Federal Reserve Survey of Household Economics and Decisionmaking

SHIFTING SUPPLY & DEMAND

Low housing production paired with changes in residents' preferences and behavior led to a shrinkage in the overall supply of homes available to potential homeowners over the last decade. At the height of the Great Recession, in 2008, homes were on the market for a median of 75 days. With demand increasing relative to supply since around 2011, that median sharply and steadily declined, and by 2020 homes were on the market for a median of only six days. In 2020, around 5% of rental units were vacant and available (Figure 7).

Market-Rate Housing

The initial housing market reaction at the start of the pandemic was a significant slowdown in activity, mainly fueled by a reduction in inventory as the real estate business worked to adapt the home selling and buying process to adhere to COVID-19 health guidelines. That lull in inventory accelerated price increases, which did not seem to deter homebuyers' pent-up demand when inventory picked up again by mid-summer.[13]

The booming housing market, alongside reports of job loss and threats of eviction and foreclosure, is an epitomical representation of the so-called "K-shaped recovery." While some, especially low-wage earners, are struggling more than ever, others are experiencing no loss of income paired with large reductions in spending from remote work and fewer options for discretionary spending. Those in the latter category are enjoying increased personal savings, and historically low mortgage interest rates. Some homebuyers may be existing homeowners, eager to increase space to conduct work and school from home, whereas others may be first-time homebuyers, hoping to lock in the low interest rates.

Demand for housing has remained strong, meanwhile pre-existing housing production challenges have been magnified. Housing production costs have been increased during the pandemic by challenges with the cost of supplies, development review, and labor shortages. The impacts of these exacerbated market-rate supply shortages are two-fold.

First, price increases are accelerated (the Columbus Board of Realtors reported a 10.5% price increase in 2020, market wide), and 'days on market' are reduced (a median of 6 days in 2020), both of which make the housing market less accessible for homebuyers at all price points (Figure 8).[13]

Second, market shortages reduce the availability of affordable housing that occurs naturally in the market (known as Naturally Occurring Affordable Housing, or NOAH). This segment of the housing

Figure 7. Housing Market Trends
Columbus MSA
2000 - 2020, Annual

SOURCE : U.S. Census Bureau 1-year American Community Survey

market fills an important gap for households that have limited incomes, but not low enough to qualify for subsidized housing, as well as those who are on waitlists for but have not yet obtained subsidized options.

The impacts of market price increases on NOAH affects the market for potential first-time homebuyers. The market share of homes priced below $180,000 (a benchmark for affordability based on Area Median Income, or AMI) fell 11.5% in 2020.[13] It can also reduce the availability of small-scale rental properties (single-family rentals and two- or three-unit properties), as these property owners may be motivated to fetch a higher price in the seller's market. As rentals, these units fill an important need for low- and middle-income families who cannot afford to buy but need more space than the more-plentiful 1- or 2-bedroom low-cost apartment units can offer.

The National Association of Home Builders recorded lumber prices at $955 per thousand board feet in September 2020, which was up 62% since April. However, prices have started to lower with a November 2020 price of $567. Supply chains have also experienced instability. For instance, some global suppliers halted production because of COVID-19 which then rippled through housing production markets.

Based on interviews with local housing experts, the pandemic is influencing the type of stock produced although developers are unsure what trends will last. If people continue to work from home after the pandemic, they may want an extra room to use as an office and may be willing to live further out from the city core. Internet bandwidth and accessibility will also be important. Apartment unit developers are anticipating less demand for common areas for complexes.

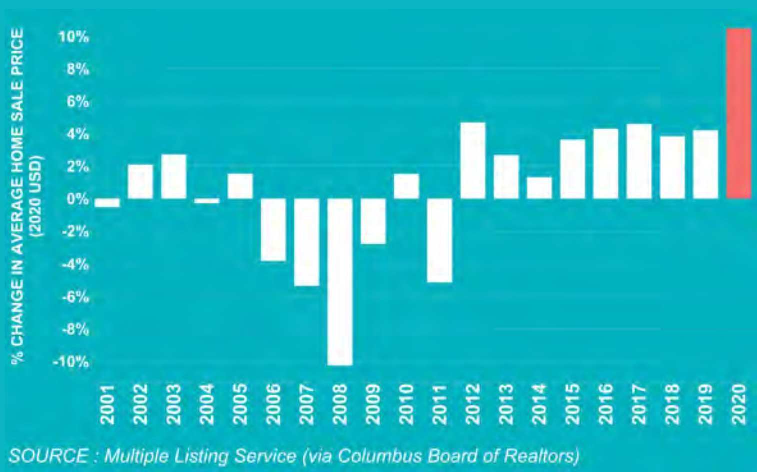
Subsidized Housing

Subsidized affordable housing production is limited by costs in the same ways as market rate production, but with the added barrier of regulatory costs. The cost of producing an affordable housing unit "may be 20-25% more than costs to produce market rate homes", shared a Central Ohio affordable housing expert.

Some affordable housing developments qualify for incentives and tax credits that offset the cost, but gap financing for projects is needed even with incentives such as the Low-Income Housing Tax Credit. Projects that do not win these federal incentives or credits are strained to an even greater degree. Developments with land close to bus lines, in highly rated school districts, and near jobs make a competitive case to qualify for incentives and tax credits. However, these prime locations are not plentiful, and may in some cases be in direct competition with market rate projects. Other locations for affordable housing plans may not qualify for the incentives to make the project financially viable.

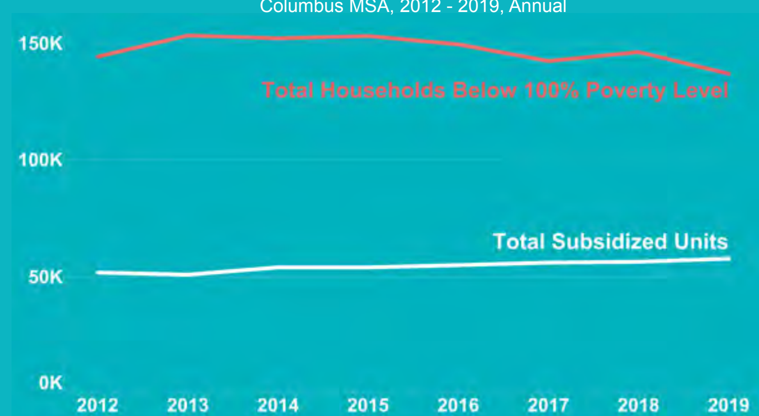
According to interviews with local affordable housing experts, the number of housing vouchers in the region remained consistent during the pandemic. However, even before the pandemic, there were not enough subsidized units (either place-based or vouchers) to meet the need (Figure 9). Families with recently reduced income who now qualify for assistance are on a long wait list for housing vouchers. Reviews and approvals for vouchers and other funding applications are also taking longer with government offices working remotely. Furthermore, the pandemic has increased the number of households that have reduced income and may need housing assistance, but still do not qualify for subsidy.

Figure 8. Home Sale Prices
7-County Central Ohio Region
2019 - 2020, Annual



SOURCE : Multiple Listing Service (via Columbus Board of Realtors)

Figure 9. Subsidized Housing & Households in Poverty
Columbus MSA, 2012 - 2019, Annual



SOURCE : U.S. Department of Housing and Urban Development Picture of Subsidized Housing; U.S. Department of Housing and Urban Development Low-Income Tax Credits; U.S. Census Bureau 1-year American Community Survey

THE CONTINUUM OF CARE

Before the pandemic, homelessness was a growing challenge in Central Ohio, largely centered in Franklin County, as the most populous county and where many homeless support resources are available. As a growing region, population growth alone was a major contributor to rising homelessness. According to the Community Shelter Board, the Continuum of Care serving much of the Central Ohio region, population growth accounts for 60% of the 1,700 additional homeless individuals since 2010.[14]

Regardless of changes in needs stemming from the pandemic, Community Shelter Board predicts 150 new people experiencing homelessness each year as the region continues to grow. The greatest gaps in service are for families experiencing homelessness, which are overrepresented by Black or African American mothers and their children.

The booming housing market in Central Ohio was already creating risk factors for homelessness. The increasing scarcity of low-cost housing, including subsidized housing, prices many low-income households out of the market. With demand outweighing supply, this creates more barriers for low-income residents as property owners can afford to be pickier with tenant selection. This means that the residents most likely to experience poor housing outcomes and homelessness—those with past evictions, convictions, and poor credit histories—are at even greater risk for housing trouble.

The pandemic, which led to extensive job loss or reduction of employment, triggered federal and local policies creating safety nets (e.g., eviction moratorium, stimulus payments, and unemployment benefit expansion) to avoid widespread crisis. In their semi-annual Indicator Report for fiscal year 2021, the Community Shelter Board attributes a 51% reduction in families needing shelter (comparing 7/1/2020 - 12/31/2020 to the same period in 2019) to the success of these safety nets.[15] In addition to a reduction in families needing shelter, there were reductions for single women, pregnant women, and veteran's seeking emergency shelter. There was a small (2%) increase in the number of single men seeking shelter, and their average time spent in shelter increased (Figure 10).

According to analysis from the US Census Bureau, one out of three American households receiving unemployment benefits are still struggling to pay for essentials like food, rent and childcare.[16] Even with safety nets in place, many families are struggling to make ends meet.

With an eye toward homelessness prevention, the region's Continuum of Care is already positioned to monitor for potential influxes of individuals or families experiencing homelessness. Eviction, of course, is a clear warning sign for future homelessness, however people are inclined to exhaust all other options, such as seeking lower cost housing or doubling up, before seeking emergency shelter. According to one interview, family and friends are more willing to allow doubling up in their homes due to fears about COVID-19 in emergency shelters. As these concerns dissipate, however, individuals and families may have fewer opportunities to double up.

With reports in the region of residents moving into more precarious housing situations as a way to avoid eviction before the moratorium is lifted, there is an even greater need for tools, like housing stability screening and strengthened referral networks, to identify residents on the verge of homelessness early and offer services to increase housing stability.

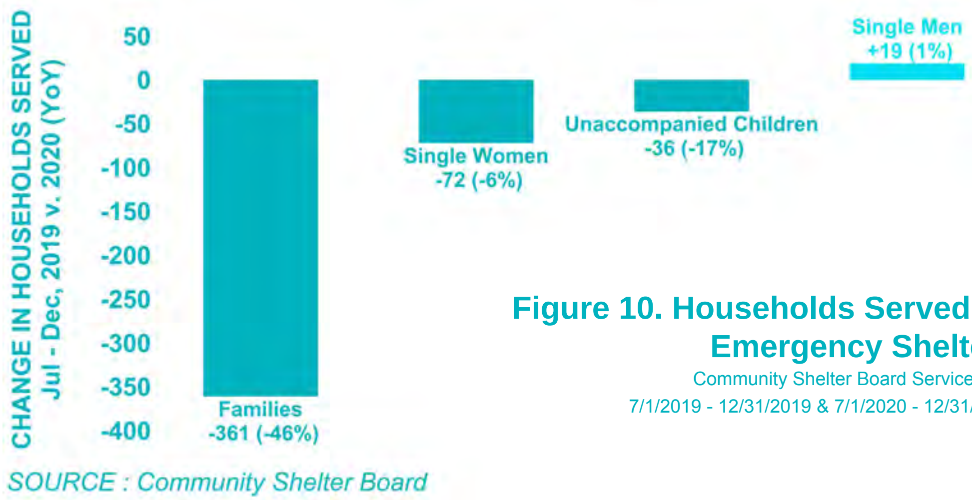


Figure 10. Households Served by Emergency Shelters

Community Shelter Board Service Area

7/1/2019 - 12/31/2019 & 7/1/2020 - 12/31/2020

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CENTRAL OHIO
COVID-19
POLICY BRIEFS

Franklin County Public Health

THE CITY OF COLUMBUS CITY COUNCIL

MID-OHIO REGIONAL MORPC PLANNING COMMISSION

PUBLIC HEALTH

Summary

Central Ohio, like the United States overall, has a long history of disparate health outcomes based on class, but especially on race and ethnicity. Social determinants of health include things like access to healthcare or adequate and nutritious food, which leads to a gap in health outcomes based on income. Also, research shows that Black and brown people are often treated differently for medical concerns, which leads to overall poorer health outcomes among people of color, regardless of income. A long history of structural racism has also included disinvestment in Black and brown communities, destabilizing neighborhoods, which has led to greater problems with mental health and substance use, and subsequent problems with violent crime.

The pandemic brought tragedy for all residents who lost a loved one to the virus, and in communities of color, where lives were already lost too early more often, the pandemic exacerbated this trauma. Lives were lost at a greater rate among Black and brown residents, not only due to the virus itself, but also because of the social and economic disruption created by the pandemic, which more severely impacted these communities.

Key Issues

The **COVID-19 virus had disparate impacts**, affecting older residents more severely, as well as Black and Hispanic or Latinx residents at higher rates. Inconsistencies in how these data are reported point to a need for clarification of messaging to better-understand these impacts.

Public health messaging in communities of color presented challenges. Despite great local efforts to reach immigrants, New Americans, and Black residents about the virus and vaccine, there are historical reasons why these communities continue to be difficult to reach.

The social and economic impacts of the pandemic have created **secondary public health concerns** like medical treatment delays, increased substance use, mental health problems, and a sudden increase in homicides. The greater severity of impact in Black and brown neighborhoods has meant a greater increase in these secondary health issues in those communities.

Food insecurity more than doubled in the state of Ohio, despite the volume of resources aimed to ensure out-of-work residents and residents with greater health risks had enough food and food access.

DISPARATE IMPACT OF COVID-19 VIRUS

Poor health outcomes are understood to be impacted by a host of social determinants of health, including disparities in access to community resources and assets, like healthcare facilities. Social and environmental factors have particularly negative impacts for those in low opportunity neighborhoods, which result in poor health outcomes for people of color, and especially Black residents more than white residents—while Black residents make up 15% of the Central Ohio population, they represent 24% of the population in low opportunity neighborhoods, and 48% of the population in very low opportunity neighborhoods.

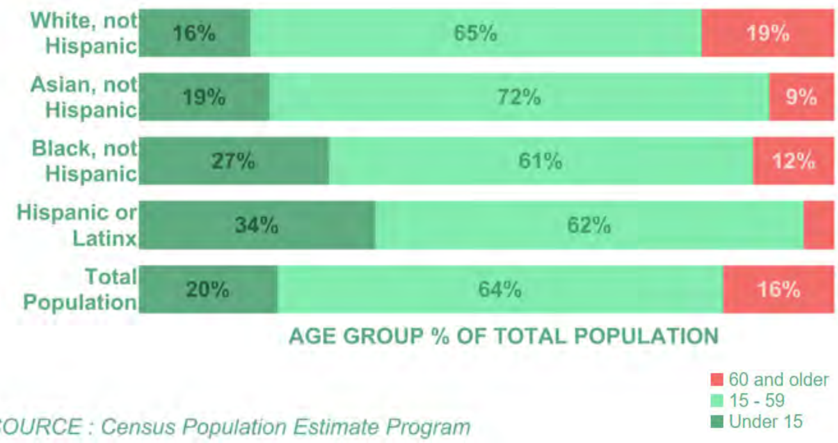
In Franklin County, the most racially and ethnically diverse county in the region, 19% of the white population is 60 or older, only 12% of Black residents are 60 and older, and only 4% of the Hispanic or Latinx community is in this age group (Figure 1).

The reasons for these age distribution differences vary for different groups. Research suggests that Black bodies tend to age more rapidly, a phenomenon called "epigenetic aging", that is caused by chronic stress and leads to shorter overall life expectancies.[1] This is evidenced in Central Ohio neighborhoods where the higher the percentage of Black residents, the lower the average life expectancy (Figure 2). Hispanic and Latinx families tend to be younger and larger overall, which makes older adults a smaller proportion of their age distribution. Hispanic and Latinx people have overall longer life expectancies than white or Black people.[2]

When COVID-19 began spreading through the region, it became clear that the disease was having disproportionately serious impacts on older adults. As of April 2021, Central Ohioans 60 years and older made up only 18% of total COVID-19 cases, but 91% of virus deaths (Figure 3).

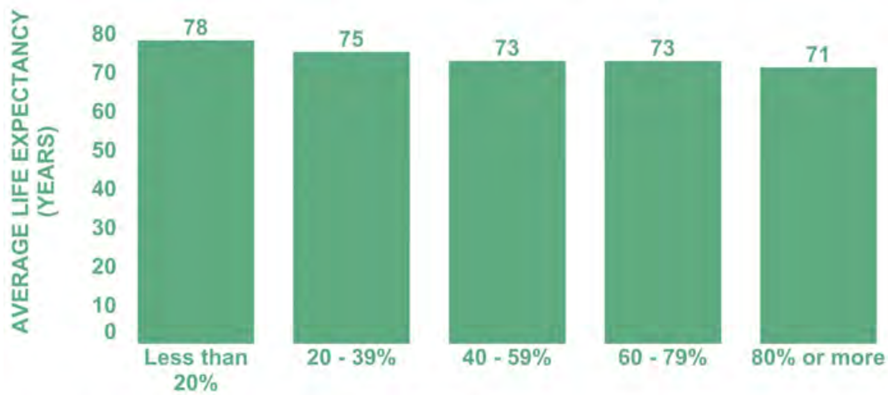
The Centers for Disease Control and Prevention (CDC) suggest that Black or African American residents are not only more likely to become infected with the COVID-19 virus, they are 2.9 times more likely to be hospitalized, and 1.9 times more likely to die from the illness. Hispanic and Latinx people make up 4% of the population in Central Ohio. Nationwide, they are not only more likely to catch the virus, they are 3.1 times more likely to be hospitalized, and 2.3 times more likely to be killed by serious cases of the illness.[3]

Figure 1. Age Distribution by Race & Ethnicity
Franklin County, Ohio, 2019



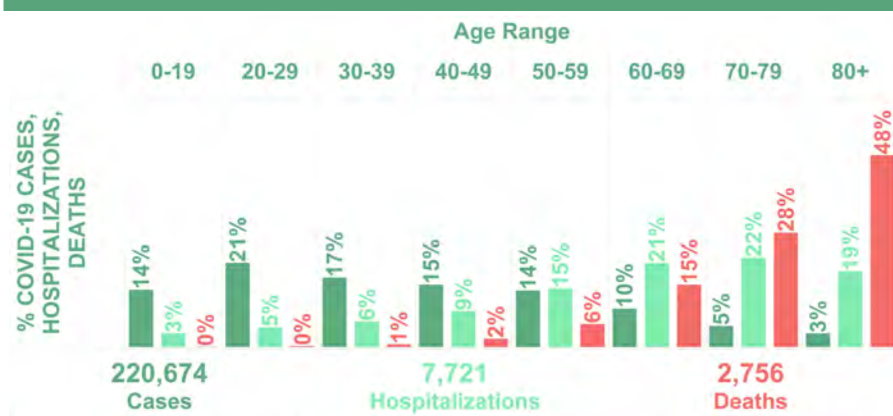
SOURCE : Census Population Estimate Program

Figure 2. Average Life Expectancy by % Black Residents
Central Ohio Census Tracts, 2018



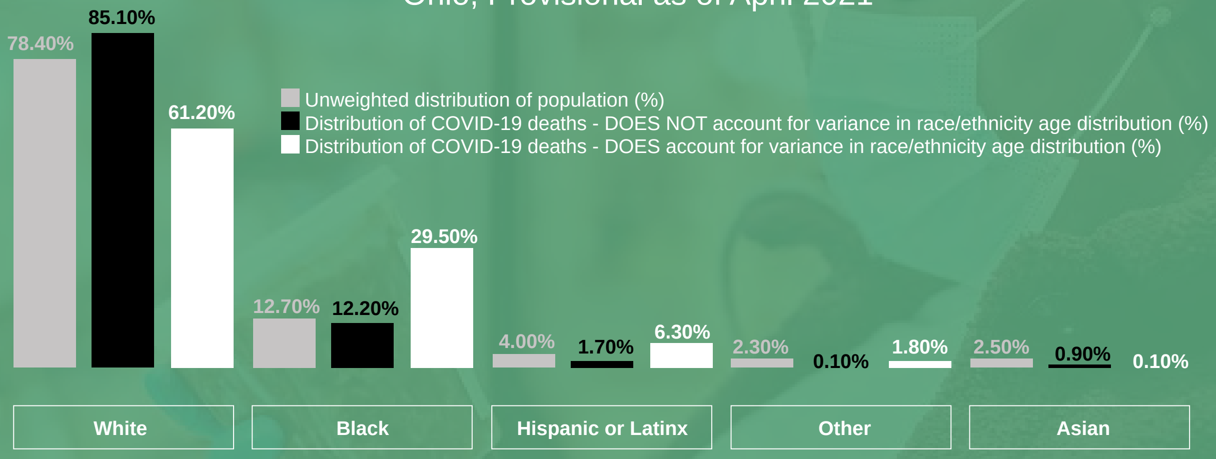
SOURCE : Kirwan Institute for Race and Ethnicity

Figure 3. COVID-19 Cases, Hospitalizations, & Deaths by Age
Central Ohio Counties, As of April 2021



SOURCE : Ohio Department of Health Coronavirus Summary Data, including mortality data by county of residence

Figure 4. COVID-19 Deaths by Race & Ethnicity
Ohio, Provisional as of April 2021



SOURCE: The Centers for Disease Control and Prevention National Center for Health Statistics Provisional Death Counts for Coronavirus Desease 2019 (COVID-19)

In the State of Ohio, raw data on COVID-19 virus-related deaths seems to contradict the national trend toward inequitable impacts by race. COVID-19 deaths among Black residents occurred in proportion with percent of Black residents in the state (12%). Deaths among Hispanic and Latinx residents were less than the proportion of Hispanic and Latinx people living in the state (2% of deaths compared with 4% of population).[4] Statewide, the data on cases overall and hospitalizations caused by the virus has significant gaps in race and ethnicity information so meaningful comparisons cannot be made.

Data from the CDC for the State of Ohio, however, offers an alternative view. They standardize the data for age (a common practice for reporting mortality statistics), which accounts for differences in the percent of population in different age ranges across racial and ethnic groups. This perspective on the severity of COVID-19 by race makes a clear case for the importance of age-adjustment of COVID-19 mortality data to ensure an accurate account of the impact. After applying an age-adjustment, which assumes the extent of deaths if all races and ethnicities had the same age distribution as the population as a whole, Black residents (12% of the population) would have represented 30% of all COVID-19 deaths. Hispanic and Latinx Ohioans (4% of the population) would have represented 6% of deaths (Figure 4).[5]

Local data on race and ethnicity of people who have been sick with, hospitalized by, or killed by COVID-19 are not comprehensive. For example, Ohio data reports comprehensive race or ethnicity among those who died from COVID-19, but classifies nearly 30% of cases and more than 10% of those hospitalized as either “unknown” or “other”, which makes it impossible to track the impact on different populations.[6] While it is not conclusive how racial and ethnic groups are being impacted by all measures in proportion to their percent of the population, there is definitive data to support that Black residents are disproportionately hospitalized by the virus in the City of Columbus, even based on raw counts.[7] Were this data to be age-adjusted, this disparity would be expected to increase as it did in the CDC data.

Gaps in demographic COVID-19 data and inconsistencies in reporting on disparities signal a need for data communication practices to support the identification of health equity issues as a critical step to addressing them. The CDC’s interpretation of the data paints a clear picture of the stark disparities of COVID-19 virus impacts in Ohio. The CDC suggests why this is occurring, stating that, “race and ethnicity are markers for other underlying conditions that effect health, including socioeconomic status, access to healthcare, and exposure to the virus related to occupation, e.g., among frontline, essential, and critical infrastructure workers.”[8]

There was already a life expectancy gap for Black residents, which can be observed locally—the higher the proportion of Black residents in a Central Ohio neighborhood, the lower the life expectancy. Black people die earlier than white people, and national research suggests the pandemic will widen the gap. For Hispanic or Latinx people who have longer life expectancies, COVID-19 will have a greater impact. In 2020, researchers suggest a 0.68-year life expectancy reduction due to COVID-19 for white Americans, compared with a 2.10-year and 3.05-year reduction for Black and Hispanic or Latinx Americans, respectively.[9]

PUBLIC HEALTH MESSAGING IN COMMUNITIES OF COLOR

Some local leaders have suggested barriers in access to public health information among Black and brown communities as another potential source of disparity. Challenges remain despite efforts to address barriers, such as language, lack of continuous healthcare, and medical mistrust among communities of color.

Language barriers are a more tangible challenge to address. Local organizations like US Together and the Center for Refugee and Immigrant Services have produced translated materials of public health guidance related to COVID-19 in common languages spoken in the region, like Spanish and Somali.

Providing translated public health information is one piece of the puzzle; however, the Robert Wood Johnson Foundation conducted research that suggests that immigrants are generally less connected to healthcare providers, and more likely to forgo needed medical treatment for reasons that seem to extend beyond language barriers alone.[10] Some national headlines point to recent concerns, especially among undocumented immigrants, around seeking treatment or receiving the vaccine for COVID-19.[11]

Additional research suggests that persistent discrimination in medical care for Black residents has led to widespread general mistrust of the healthcare system.[12] Locally, leaders from the Central Ohio Area Agency on Aging (COAAA) and the Alcohol, Drug and Mental Health Board of Franklin County (ADAMH) noted this concern among immigrant, New American, and Black residents in the region. These groups are often those employed in residential facilities, and interviewees cited reported concerns among these workers about taking the vaccine or receiving medical treatment. “Vaccine fear is based on a historical lack of trust in the medical profession and on lived experience of Black people,” stated an interviewee.

Medical mistrust is a deep-seeded experience rooted in long-standing institutional racism—it cannot be remedied quickly or easily, but it is imperative that policy-makers approach this and other public health matters through this lens of understanding and ensure that diverse perspectives are represented in decision-making about public health messaging and disparities.

An article on the topic from The Commonwealth Fund captures one key perspective on the issue, “When asked if seeing President Obama receive the COVID-19 vaccine on camera would persuade them to get vaccinated, two Black men pointed out to a Washington Post reporter that should the former president experience serious side effects he’d have access to the best doctors and receive care that is unimaginable in their own or other low-income communities.”

National survey data suggests that Black, Hispanic or Latinx, and people identifying as two or more races are disproportionately hesitant about the COVID-19 vaccine (Figure 5). Across the U.S. population, people who are hesitant about the vaccine cite concerns about side effects or plans to wait until they know it is safe as their main reasons for delaying or deciding against the vaccine (Figure 6). Local leaders are working on messaging and communication designed to help residents overcome vaccine safety concerns, like videos created by Columbus Public Health that contain clear information that debunk common vaccine myths and emphasize vaccine safety.

Figure 5. Hesitance About the COVID-19 Vaccine by Race & Ethnicity
United States, March 17 - March 20, 2021

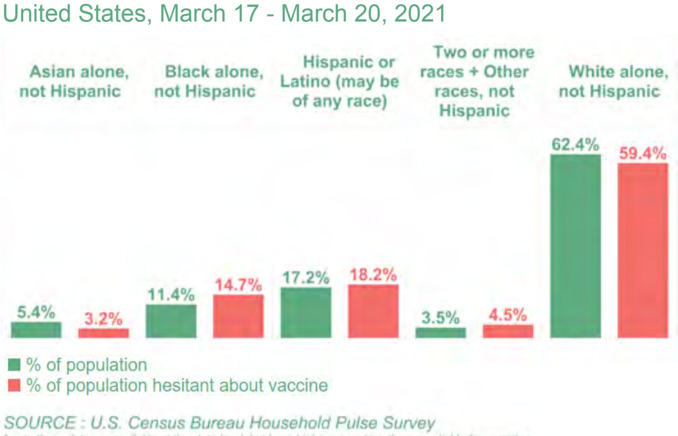
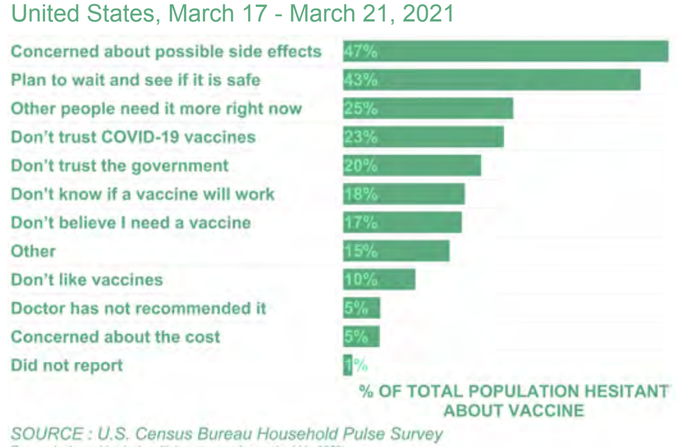


Figure 6. Reasons for Vaccine Hesitancy
United States, March 17 - March 21, 2021



SECONDARY PUBLIC HEALTH CONCERNS

Before the pandemic, the death rate in Central Ohio had increased from around 2,100 per 100,000 residents in the early 2010s to around 2,400 per 100,000 residents beginning around 2016. This increase in lives lost was partly tied to illness affecting older adults as more of the population moved into the later stage of life, but it was also tied to the opioid epidemic – more people were dying from opioid drug overdoses than ever before.[13]

The COVID-19 pandemic brought even more tragedy for many Central Ohioans. In 2020 alone, the virus took the lives of 2,006 Central Ohio residents, yet the total year over year increase in deaths was 3,054.[14] Clearly the virus itself was not the only source of increased deaths. Even controlling for population growth, the death rate jumped from 2,500 per 100,000 residents in 2019 to 3,000 per 100,000 residents in 2020.

Beyond the lives lost to COVID-19, causes of death with increases in 2020 appear, in some cases, related to lack of access to medical treatment for people with chronic illnesses. A March 2021 survey from the U.S. Census Bureau indicated that 1.5 million Ohioans delayed getting medical treatment because of the coronavirus pandemic.[15] Increased deaths caused by lack of access to or intentional avoidance of medical care may be a contributing factor in increased deaths, especially among older residents. In 2020, there were 2,383 more deaths among residents 65 and older compared to 2019, but deaths attributable to COVID-19 only account for about 70% of the increase.

According to interviews with staff from the Central Ohio Area Agency on Aging (COAAA), one factor impacting health among older residents is the healthcare workforce, specifically, front line workers providing direct care. This workforce was reduced by people contracting COVID-19, the fear of becoming infected, or having to leave their employment to manage their own pandemic-induced personal issues (e.g., remote schooling), an interviewee suggested. The lack of home health aides particularly hampers access to in-home health supports for both seniors and people with disabilities. The interviewee suggested that multi-generational immigrant and New American households often had successful models for senior care. Younger family members were even able to become home health aides and receive paid compensation for caring for their older relatives.

Interviewees also suggested a need for improved infrastructure for back-up care (e.g., nursing homes) for people otherwise aging at home. Because of concerns about COVID-19 spread, seniors have been reluctant to go to residential facilities when home healthcare is unavailable, or if they have an acute condition and need more care.

Older adults were not the only ones experiencing higher death rates for reasons other than the COVID-19 virus itself. Among 15 to 64-year-olds, there were 683 more deaths compared to 2019, of which 44% were attributable to the COVID-19 illness. Other increases were related to substance abuse.[16] In 2020, there were 36% increases each in deaths from alcoholic liver disease (45 more than 2019), and drug overdoses (300 more than 2019).

Substance-related issues appeared in another trend – a surge in state tax revenues for alcohol and tobacco sales. In 2020, Ohio collected $13 million more in alcohol sales tax, and $100 million more in tobacco sales tax revenues than in 2019 (Figure 7). Some residents seem to be coping with the anxiety of the pandemic, social isolation, financial worries, or secondary trauma through increased substance use.

In addition to the increase in causes for mental and emotional distress, the pandemic has also created new barriers to accessing supports. According to interviews with staff from the Alcohol, Drug and Mental Health Board of Franklin County (ADAMH), the delivery method for services has changed during the pandemic. In-person services were still offered when possible, but alternatives like virtual appointments and phone calls were provided as alternatives. However, communities with already limited access to consistent care and supports, and challenges with digital access likely suffered more from the mental health side-effects of the pandemic.

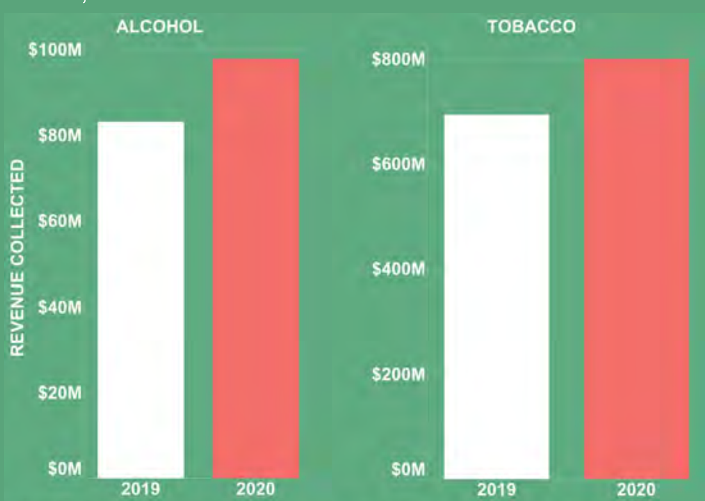
Interviewees from both ADAMH and COAAA mentioned concerns about social isolation amid worries around COVID-19, especially for people in residential facilities, "…with waves of COVID pushing through the facilities where maybe there are staffing shortages... you also have family members who can't even visit their loved ones. So, you have that added isolation on top of all of this fear and anxiety," one interviewee stated.

Another alarming source of increased deaths in 2020 was a 37% increase in homicides (53 more than 2019). Decades of academic research suggests that inequality of resources, a condition experienced by people in poverty and disproportionately includes Black people, causes higher homicide rates.[17] As such, increasing homicides during the pandemic almost entirely affected the Black community. Young Black men, especially, were being killed at a rate 1.6 times higher than the average rate over the previous 13 years in Central Ohio.[18] Black residents experienced more severe economic impacts of the pandemic than other races or ethnicities, which magnified the inequality of resources that already existed.

Despite a reduction in other types of crime, national headlines have remarked on a startling trend of rising homicide deaths in cities across the nation.[19] Bloomberg CityLab discussed possible reasons for the trend including the pandemic's destabilization of neighborhoods and community services, and an increased sense of fear and instability in communities heavily impacted by COVID-19. Separately, experts have suggested food insecurity—which more than doubled in Ohio in 2020—can lead to increased aggression.[20]

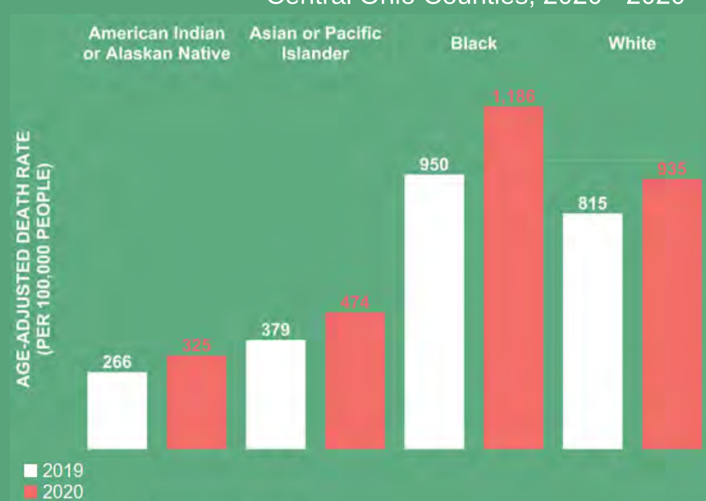
All of the increased loss of life mentioned above impacted the Black community at higher rates (Figure 8). This will leave a mark on our region's communities that will last far beyond the pandemic itself. Challenges created by sustained lack of access or avoidance of medical and mental health care, and the web of people and communities impacted by the trauma of an unimaginable increase in lost lives will have lasting public health challenges and will need continued resources and support.

Figure 7. State Alcohol & Tobacco Sales Tax Revenues
Ohio, 2019 - 2020



SOURCE : U.S. Census Bureau Selected Monthly State Sales Tax Collections

Figure 8. Death Rate by Race and Ethnicity
Central Ohio Counties, 2020 - 2020



SOURCE : Ohio Department of Health

FOOD INSECURITY

Food insecurity is a serious public health concern that research shows can have lifelong social, economic, and health effects on those who experience it. Lack of food contributes to diet-related chronic illness, as well as developmental delays and social and behavioral problems among children.[21] Survey data collected from 2016 to 2018 suggests that 1.5 million households in Ohio were food insecure, which can range from a periodic lack of resources to provide adequate, nutritious meals; to hunger, skipped meals, or not eating for entire days at a time.[22]

The pandemic shutdowns had devastating effects for many Central Ohioans, including astronomical un- or underemployment (discussed in the Employment & Small Business brief). As a result, more Ohio households were experiencing food insecurity than before the pandemic. Even as recently as March 2021, 3.6 million Ohio households reported food insecurity—1.4 million were households with children.

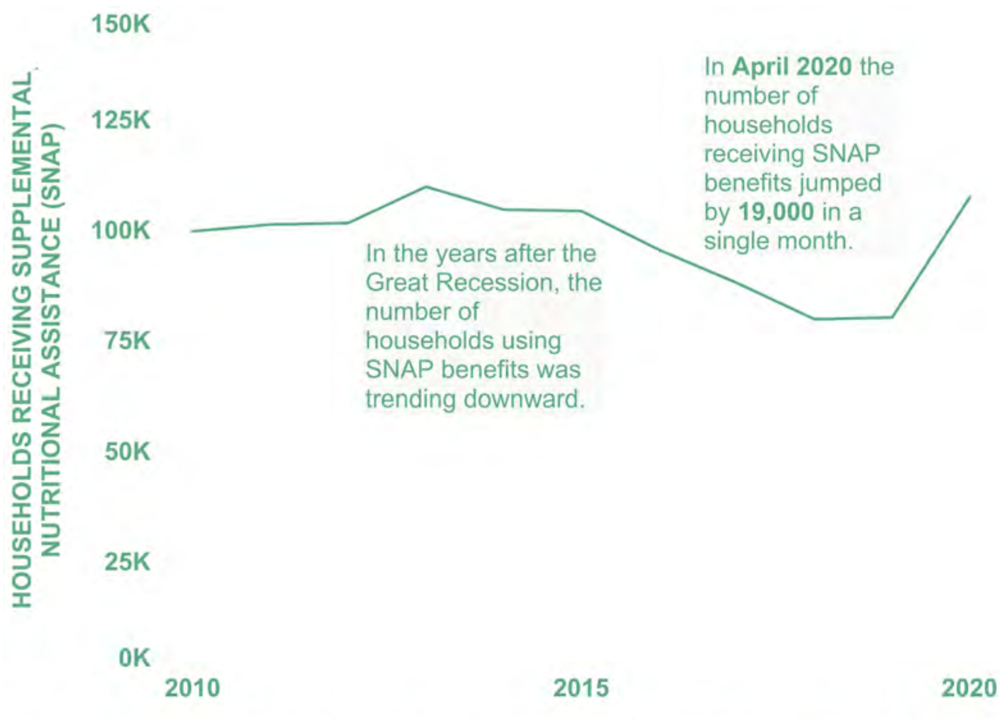
This, more than doubling households missing meals or going without adequate and nutritious food, has happened despite the incredible state and local efforts to address the issue. Prior to the pandemic, many families relied on school-provided free meals to ensure their children had enough to eat. With school districts conducting remote education, this became more challenging. Efforts were made to offer school meal pickup, but still, numbers of meals provided were down from 2019 in the state.[23] Additionally, families of free or reduced lunch-eligible children who were already using the Supplemental and Nutritional Assistance Program (SNAP) were provided increased food assistance. Electronic Benefit Transfer cards (like debit cards for food assistance) were sent to families who were not enrolled in SNAP. In Central Ohio, 19,000 more households enrolled in SNAP shortly after the start of the pandemic shutdowns (see the Social Sector brief for more detail) (Figure 9).

Food banks and pantries faced initial challenges with safe food distribution. The Mid-Ohio Food Collective, a collective organization of food banks serving Central Ohio, has taken the lead on developing protocols and guidance for operating safe, contactless food pick-up sites throughout the region. Their 2020 annual report states that they served nearly 400,000 individuals and served 25,000 families who had never visited a food pantry before. They distributed over 29 million pounds of food from March to June 2020—30% more than was distributed during the same period in 2019.[24]

Figure 9. Government Food Assistance

Columbus MSA

2010 - 2020, Annual



SOURCE : U.S. Census Bureau American Community Survey; Ohio Department of Job and Family Services (2020 only)

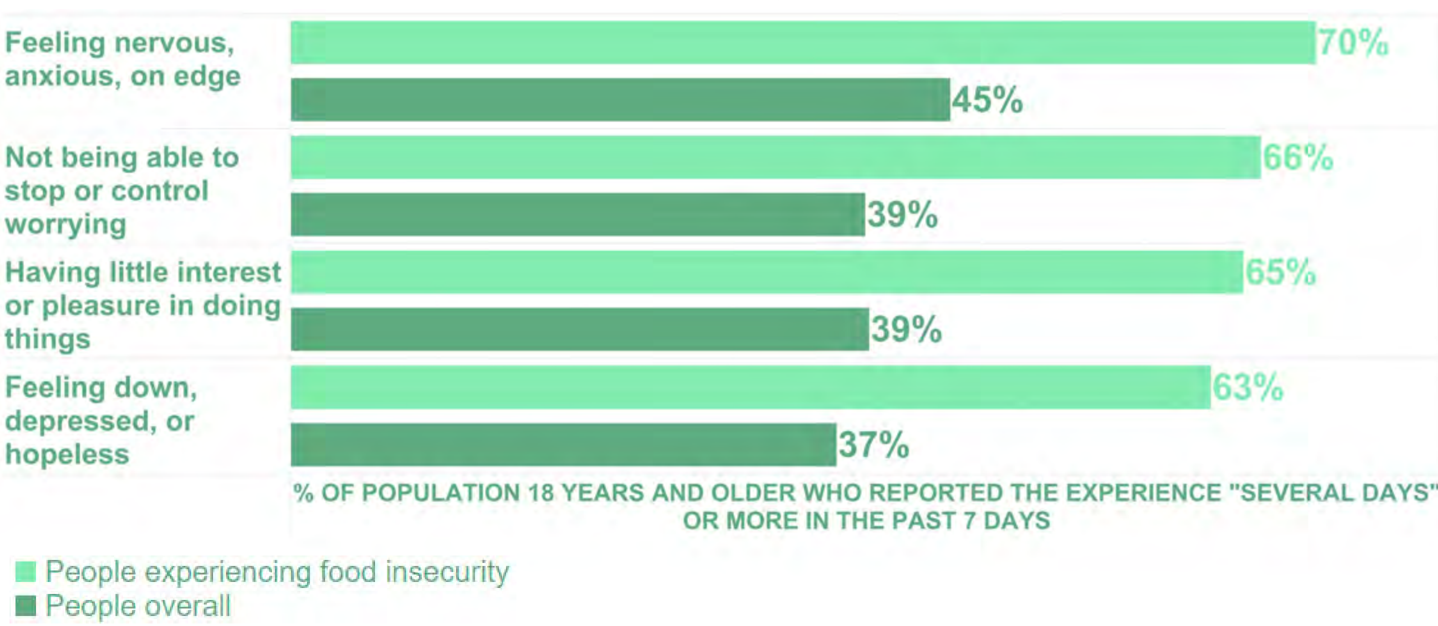
In an interview with a representative of the Central Ohio Area Agency on Aging, unique concerns around food distribution to older residents were discussed. Seniors eligible for Meals-on-Wheels were given increased service, and area agencies on aging tapped into other resources such as volunteer or charity funds to help provide people with some additional food or local food box programs. Home health aides were encouraged to assist with grocery shopping for their clients to help manage the risk of exposure. However, it was noted that some people still experienced challenges, most notably those with low-incomes who may not qualify for Meals-on-Wheels, and those without home health aides.

Nationally, surveys conducted by the U.S. Census Bureau in March 2021 suggest that people of color disproportionately experienced food insecurity. Black or African American people make up 11% of the survey respondents but 15% of people who experienced food insufficiency. Similarly Hispanic or Latinx people were 17% of respondents but 25% of people wo experienced food insufficiency. Pre-pandemic data suggests that rural communities experience greater food insecurity as well. According to Feeding America, "rural communities make up 63% of counties in the United States and 87% of counties with the highest rates of overall food insecurity." [25]

There are lasting concerns about the increase in households experiencing prolonged food insecurity—rises in diet-related disease rates, and more barriers to success for children in school and beyond. Whether prolonged or temporary, the U.S. Census Bureau survey sheds light on less tangible but not less important concerns around the mental health impacts of food insecurity. Nationally, people who were food insecure in a March 2021 survey reported up to twice as often than the overall population that they were experiencing frequent mental and emotional distress (Figure 10).

Food resources and distribution systems are strong in Central Ohio, yet the shock of the pandemic was enough to press those systems beyond their limits. With 2 million more households facing food insecurity in Ohio even a year after the shutdowns began, these limits are clear. The challenges are in part with the historical underinvestment in the social sector (for more detail, see the Social Sector brief), and with a pervasive challenge connecting people to resources, particularly people who have not found themselves needing supports before. The American Rescue Plan includes bolstered supports for food insecurity problems, like increased food benefits for SNAP recipients, greater administrative funds for state run programs to better-handle the increased volume of demand and increased or extended supports for families with children not in school.[26]

Figure 10. Mental Health Distress by Food Insecurity
United States
Mar 17 - Mar 21, 2021



SOURCE : U.S. Census Bureau Household Pulse Survey
** note these data are available at the state level, but have high error making them unreliable for reporting*

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Funders

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SOCIAL SECTOR

Summary

The social sector is a broad ecosystem of service providers (e.g., human service nonprofits, government social service departments, and some faith-based organizations), funders (e.g., philanthropic organizations, corporate, and individual donors), and partner organizations (e.g., transit agencies, libraries, and hospitals). Together, these entities work to address the needs of residents, communities, and organizations that are unmet by private, federal, and state resources. Despite a strong recovery in Central Ohio following the Great Recession, the need for supports was still increasing as a function of population growth, a widening income gap, and persistent disparities for the region's people of color.

The social sector was experiencing overall growth, but not without great hurdles to keeping nonprofits running. Furthermore, nonprofit organizations have necessarily focused on programmatic spending over operational investments, which contributed to lower resiliency in emergency situations.

The COVID-19 pandemic exacerbated both the need for community-based human services and the precarity of supports for the nonprofit sector. This "perfect storm" of challenges punctuated the need for long-term strengthening of the systems that support the region's most vulnerable residents. Many improvised solutions emerged that may serve as valuable seeds of change for a more equitable, resilient social sector going forward.

Key Issues

High un- or underemployment has contributed to an **increased need for individual supports**, by and large adding new financial hurdles for low-wage households.

The social sector fills a critical role in meeting community needs responsively, but with many small nonprofits doing this work and low investments in operations, the pandemic emergency catalyzed **instability in the nonprofit sector**.

Much needed temporary supports for nonprofits came from federal relief packages and increases in individual giving have supported part of the need, but these **funding stream shifts** were not enough to offset the increased operational costs and loss of funds from other sources.

Emergency delivery of human services presented a host of challenges, especially as nonprofits had to reduce capacity and respond to a rapidly changing and a sustained high volume of needs. The sector came together to innovate during the crisis, while unearthing new opportunities for more collaborative, effective service delivery in the future.

INCREASED NEED FOR INDIVIDUAL SUPPORTS

In the 2010s, Central Ohio experienced strong recovery from the Great Recession, including slow but steady declines in the number of residents in poverty. Even still, in 2019 there were 140,000 households living at the poverty line or below (around $25,000 annually for a household with two adults and two children), and 40% of those households earned only half of the defined income threshold for poverty (Figure 1). Compounding the need for individual supports around mental and physical healthcare, approximately 150,000 Central Ohioans lacked health insurance in 2019.

Strong economic growth in Central Ohio presents clear benefits, but it is also paired with challenges as the cost-of-living increases, raising the bar for those with lower earnings. Reflecting the widening gap for Central Ohioans, those in the highest earnings quintile saw an increase in income ten times greater than those in the lowest quintile from 2010 to 2019 (Figure 2). The nonprofit sector, in conjunction with traditional government assistance programs, play a key role in administering assistance to residents.

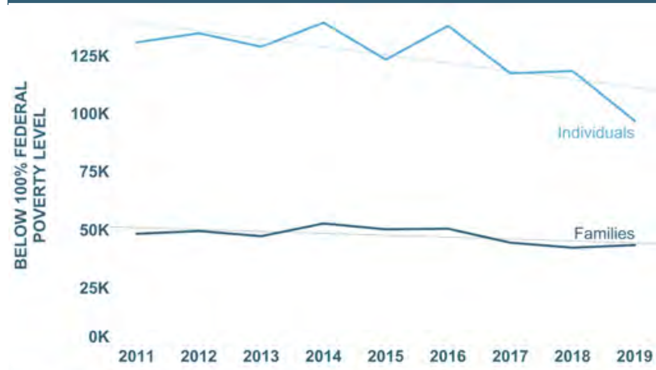
The pandemic heightened demand for basic needs, including food, shelter, and mental and physical healthcare. This affected people with low-wage jobs, hit the hardest by the pandemic shutdowns, either by expanding their existing needs for social supports, or in some cases introducing the need for supports for the first time.

Interviews with leaders from the Central Ohio social sector highlighted the value of direct financial assistance to individuals, such as federal stimulus payments and enhanced unemployment benefits, to efficiently meet basic needs. While the cash assistance was a critical support, there were still more Central Ohioans seeking traditional government assistance than before the pandemic. For example, in April 2020, Central Ohio saw a sudden increase in food assistance recipients (19,000 more households than March 2020). More children than adults were living in these households, pointing to a likely prevalence of single parent households among those seeking assistance from the state (Figure 3).

In 2019 in the Columbus MSA, a disproportionately high number of families with 3 or more people were receiving benefits like food assistance, and 55% of households below the poverty level were single mother households compared to just 13% of households overall.[1]

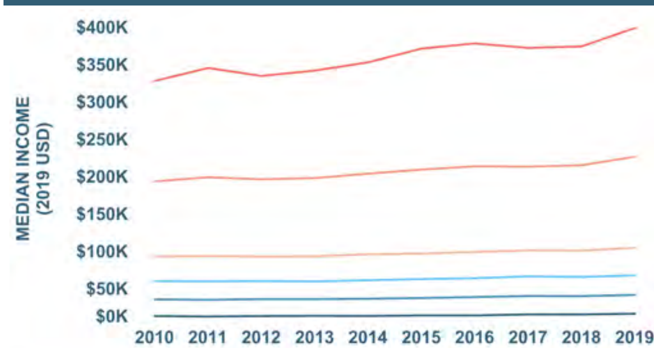
Furthermore, survey data from the U.S. Census Bureau suggests that one out of every three adults in Ohio are having a somewhat or very difficult time keeping up with usual household expenses in March 2021. These Ohioans are less likely to have maintained their pre-pandemic income, which indicates loss of employment as a major factor contributing to their difficulty keeping up with expenses. They are more likely to be using state-run assistance programs (e.g., Supplemental Nutritional Assistance Program), and they are more likely to be paying bills by borrowing money from friends and family, using credit cards or loans, using savings, or selling assets (Figure 4).

Figure 1. Poverty
Columbus MSA, 2011 - 2019 (Annual)



SOURCE : U.S. Census Bureau American Community Survey

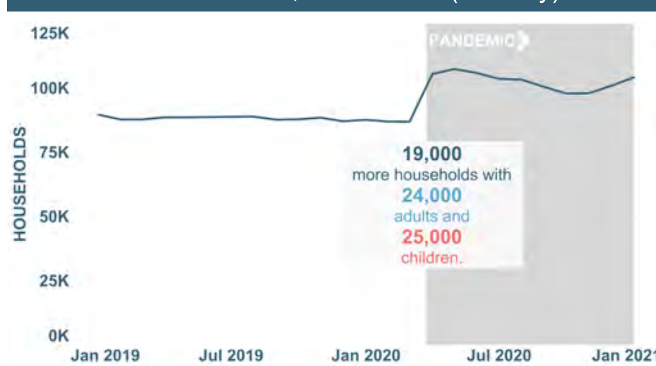
Figure 2. Quintile Median Income
Columbus MSA, 2011 - 2019 (Annual)



INCREASE FROM 2010 TO 2019					
Top 5 Percent	Highest Quintile	Fourth Quintile	Third Quintile	Second Quintile	Lowest Quintile
$71,023	$32,878	$11,819	$7,687	$5,917	$3,179

SOURCE : U.S. Census Bureau American Community Survey

Figure 3. Households Receiving Food Assistance
Central Ohio Counties*, 2019 - 2021(Monthly)



SOURCE : Ohio Department of Job and Family Services
** Delaware, Fairfield, Fayette, Franklin, Knox, Licking, Logan, Madison, Marion, Morrow, Perry, Pickaway & Union counties*

According to analysis from the Urban Institute, more Central Ohio residents in most counties are taking out payday loans, a form of debt that is usually short-term and high interest, than before the pandemic. Some of the more rural Central Ohio counties have experienced increases in the share of the population behind on car or mortgage payments, and more residents have subprime credit scores than before the pandemic shutdowns started.[2]

Ohioans who are having the greatest difficulty keeping up are disproportionately residents who are younger, Black or Asian, single or divorced, low-income, high school educated or less, or with children under 18 living in the household.[3] These disparities are a marker of the so-called "K-shaped" recovery. Residents who were better off than others before the pandemic had more resilient structures in place (e.g., remote work options and digital access) compared to those who were worse off before the pandemic. The structures that support low-income residents and especially people of color are simply less resilient.

Interviews with Central Ohio social sector leaders echoed the Census Bureau data in the disparate effect of the pandemic on certain groups of the population. Black and brown residents were hit hardest both economically and by the health impacts of the pandemic, as were low-wage workers in essential service industry roles (e.g., restaurants and childcare). Low-wage jobs, which are prevalent in the service industry, are disproportionately held by people of color.[4]

Beyond the insights highlighted by data from the Census surveys, interviewees suggested that women were hit harder due to challenges with increased unpaid labor responsibilities while schools and daycares are closed. They also noted that older adults and residents with mobility limitations faced increased social isolation, residents with limited English proficiency faced expanded challenges accessing resources, and undocumented residents or those with uncertain legal statuses were concerned about interacting with the health and social service systems.

The uneven impact of the pandemic is certainly measured by individuals' ability to access what are usually thought of as the 'basic needs' (e.g. shelter, food, and healthcare). The pandemic also revealed the importance of other needs as elemental to thriving in contemporary society. Gaps in access to broadband, technology, and digital literacy (discussed in greater detail in the Technology & Broadband Access brief) have contributed disparities in job loss, which were further compounded by the increasing reliance on access to virtual organizations for finding support and resources, reskilling for a changing job landscape, effective use of remote education, and maintaining social ties.

Concurrent with the pandemic's alarming magnification of inequities nationwide, the death of George Floyd and ensuing protests have ignited institutions and organizations involved in social service delivery to take a more overt stance on tackling racism in their communities. Adding to the increased need for nonprofit and state-run human services from the pandemic, the developing racial justice movement created new needs for support from social sector organizations, like legal defense and bail funds; diversity, equity, and inclusion training; and community organizing.

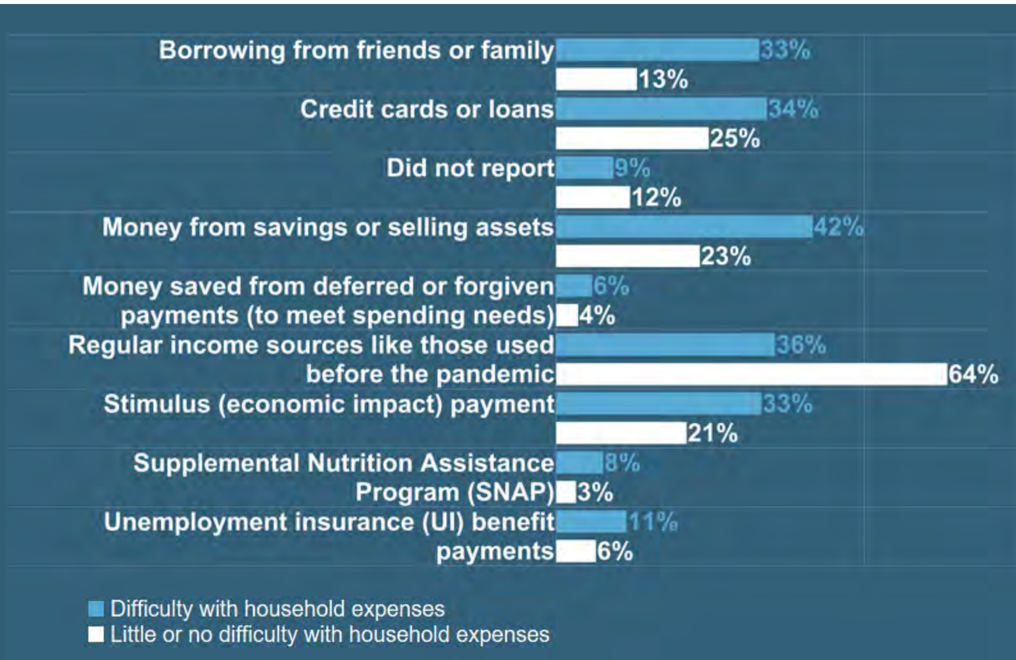


Figure 4. Funds Used to Meet Recent Spending Needs

Ohio
Mar 3 - Mar 15, 2021

SOURCE: U.S. Census Bureau Household Pulse Survey

INSTABILITY IN THE NONPROFIT SECTOR

In 2017, 1,700 nonprofit organizations in the Columbus metro employed 95,000 people, making up 11% of total employment in the region. 1,000 of those nonprofits, employing 63,000 people, were in health and social services. The nonprofit sector experienced strong growth and recovery in Central Ohio during the 2010s following the Great Recession, expanding both assets and revenues for human services, education, and the arts.[5] Growth was strong during this period, but so too were challenges for nonprofits working to maintain funding to meet their service delivery objectives. Additionally, nonprofits have historically struggled to invest in operational improvements as they often prioritize funds to programming.

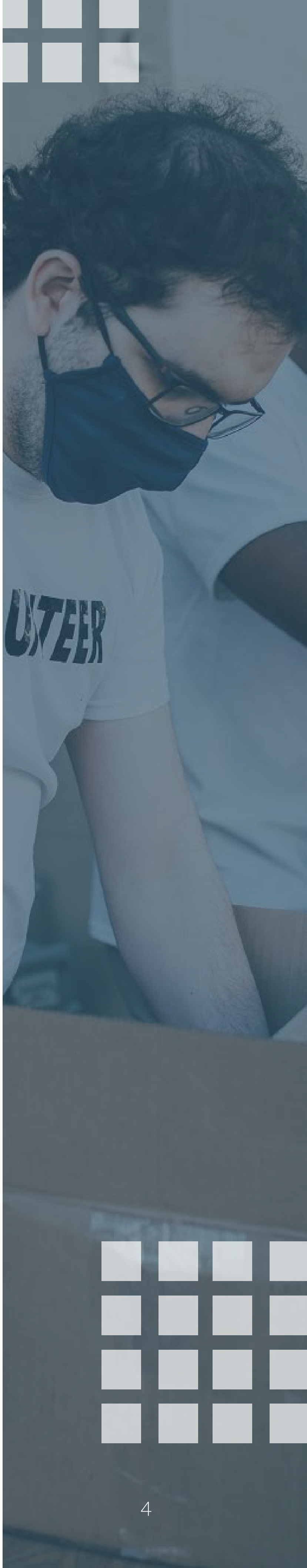
Not only do nonprofits play a key role in the region's economy, they are an essential vehicle for programmatic delivery of social support services. Nationwide, nonprofits play a critical role in community-based human services delivery. Locally, nearly all jobs in social advocacy, civic, and social organizations are in the nonprofit sector. Nonprofits also represent most jobs in key human service industries like education, individual, and family services, and in work supporting residents with developmental disabilities, mental health, and addiction.[6]

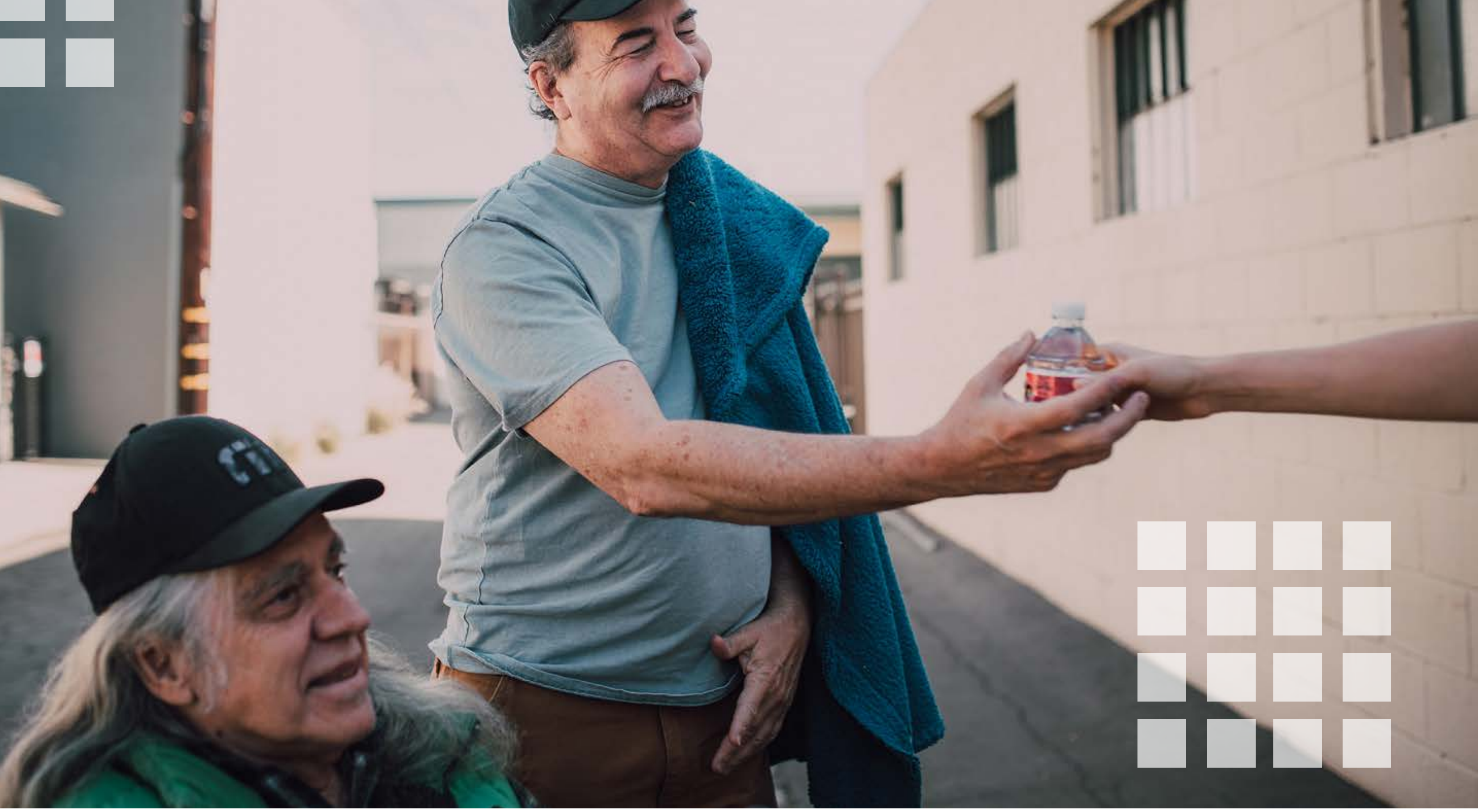
A smaller, but not insignificant share of the arts, entertainment, and recreation industry (19%) is represented by nonprofits in Central Ohio. Nationally, this industry within the nonprofit sector was hit harder than any other, facing a 37% employment reduction over the course of 2020. In interviews, representatives from the arts community highlighted the need for operational supports for arts organizations, ranging from sustaining basic operations to having performance and recording space during and after the pandemic for artists to create content. Arts and culture nonprofits were faced with technological hurdles, looking for ways to engage the community in a virtual setting. These issues are discussed in greater detail in the Technology and Broadband Access brief.

In times of crisis and economic hardship, there is an inevitable double-edged sword—more people need services and resources, while the stability of nonprofit organizations tasked with delivering those services is threatened. Nationwide, nonprofits have been severely impacted by the pandemic—by December 2020, the sector had lost nearly one million jobs, a 7% decline from February 2020, according to the Johns Hopkins Center for Civil Society Studies.[7]

In a recent survey of Ohio nonprofits, 14% of respondent organizations remained unable to provide any programs or services, and 61% reported either moderate (28%) or severe (33%) reduction in services. Furthermore, diminished funding and operational challenges have initiated contraction and consolidation of the nonprofit sector. An estimated 18% of Ohio nonprofits, mostly smaller organizations, have either already (8%) or plan to (10%) shut down operations indefinitely, and 7% have already or plan to merge with another organization.[8]

In many ways, nonprofits are like small businesses, but with additional restrictions on how to spend resources (e.g., grants with tight caps on operational expenses and onerous reporting requirements). Funders in Central Ohio have taken measures to introduce flexible grantmaking in response to the surging and rapidly shifting needs of both nonprofits and the communities they serve. They have also worked to intentionally enhance the accessibility of grant dollars, removing hurdles that would otherwise deter some small, lesser-known nonprofits from applying. Offering grant agreements that allow nonprofits greater flexibility or unrestricted use of funding, extending grant timelines, and offering opportunities to roll programmatic funds into operational budgets are some strategies that have been employed, and that may present a solution for sustained recovery of the sector, especially small nonprofits. Simplified and shared expectations for reporting and data collection among funders will also create efficiency and remove a burden for non-profits without sacrificing accountability.





Locally, these flexible grantmaking efforts have been successful in eliminating some barriers for small nonprofits receiving grants from emergency relief funds. United Way of Central Ohio (UWCO), for instance, awarded nearly $400,000 in grants to small nonprofits with no previously established relationship to UWCO by allowing organizations to apply for smaller amounts of funding that fit the scale of their organizations' capacities, and waiving requirements in the application process for new nonprofits that might otherwise deter them from applying.

The Columbus Foundation introduced application process adjustments as well. These include reduced application length, simplified application questions, significantly faster turnaround from application to receipt of grant payment (to as little as 2 weeks), and minimal reporting requirements.

Interviews with social sector leaders suggest that although most nonprofits saw a reduction in resources, some service providers, such as food banks and pantries, saw a large influx of resources to help meet needs. In these cases, the challenges were less centered on a lack of resources, but more so on the unpredictable fluctuations created by changing closures and safety guidelines (e.g., after-school programs and recreation centers). Funding and supports for organizations to adapt to the changing environment are critical.

A challenge throughout 2020 was figuring out how to leverage the variety of federal, state, local, and philanthropic resources that became available at different times throughout the year, with different levels of flexibility and deadlines for expenditure. As federal resources continue to flow in 2021, the challenge of taking advantage of all possible funding streams will become even greater.

Central Ohio leaders understood the importance of bolstering the social sector when the pandemic crisis hit. While none of the dollars from the CARES Act were specifically earmarked for nonprofits, local governments like the City of Columbus and Franklin County, and even the State of Ohio, channeled those dollars to nonprofits throughout the region. The government response paired with a surge of generosity from philanthropic entities, businesses, and individual donors was so successful, in fact, that Mackenzie Scott passed up Columbus when deciding how to spend billions in COVID-19 relief donations.[9]

Social sector leaders are hopeful that funders will permanently adopt more proactive and less reactive investments and see the value and return on investment of a well-funded and well-resourced social sector in our community. 2021 federal funds from the American Relief Plan (ARP) will be significantly greater than CARES Act dollars with fewer restrictions and have the potential to serve as a resource to enhance the Central Ohio social sector, injecting much needed and long-awaited funds into the organizations that fill the gaps in federal and state-run social service programs.

FUNDING STREAM SHIFTS

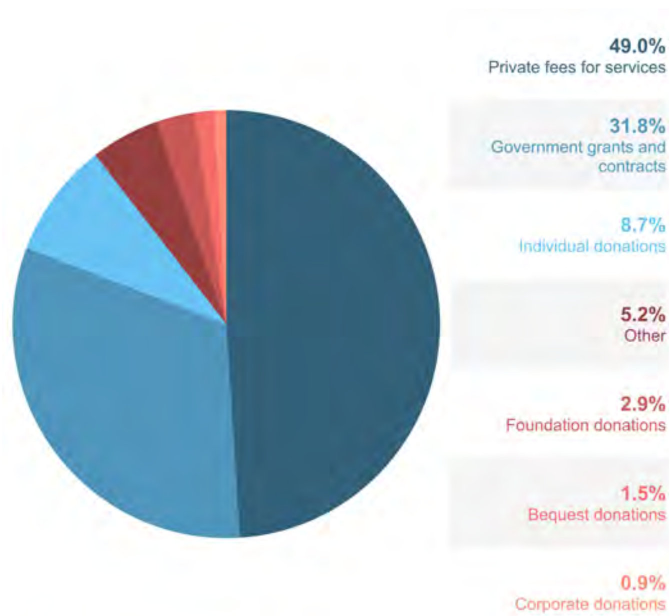
According to the National Council of Nonprofits, sector-wide, more than 80% of charitable nonprofit revenues come from private fees for services, or government contracts. While each individual nonprofit has its own funding profile, about 14% of nonprofit revenues come from charitable giving and philanthropy across the sector (Figure 5).[10] Arts organizations differ from this norm, relying more heavily on giving (about 50% of revenues) than on programmatic funds.

In Ohio, a survey of nonprofits suggests that these organizations are feeling revenue impacts of the pandemic, with 80% of respondents reporting reductions in revenues of greater than 10%, and just under half expecting revenue reductions of about 50%. Cuts appear across the board for organizations' revenue profiles—from major funding sources like fees for services and government contracts and grants, to smaller sources like individual and corporate giving (Figure 6). According to interviews with local social sector leaders, Central Ohio nonprofits are uncertain about their 2021 revenue streams. Many have used their contingency funds for 2020 and are trying to operate as efficiently as possible to work with their budgets and meet their missions in 2021 and beyond. In January and February 2021, Central Ohio health and human service nonprofits reported $74 million in unrealized revenues and $25 million in incurred expenses due to COVID-19.

While fund reductions are an issue across organizations, some strategies have bolstered nonprofit budgets. Some CARES Act dollars were channeled to nonprofits by local governments (as will funding from the American Rescue Plan Act), and The Columbus Foundation and United Way of Central Ohio each established emergency relief funds (ERF).The region's local governments and philanthropic organizations have an opportunity to learn from the successes and challenges of the 2020 federal funding distribution process to simplify application for funds and get dollars awarded quickly.

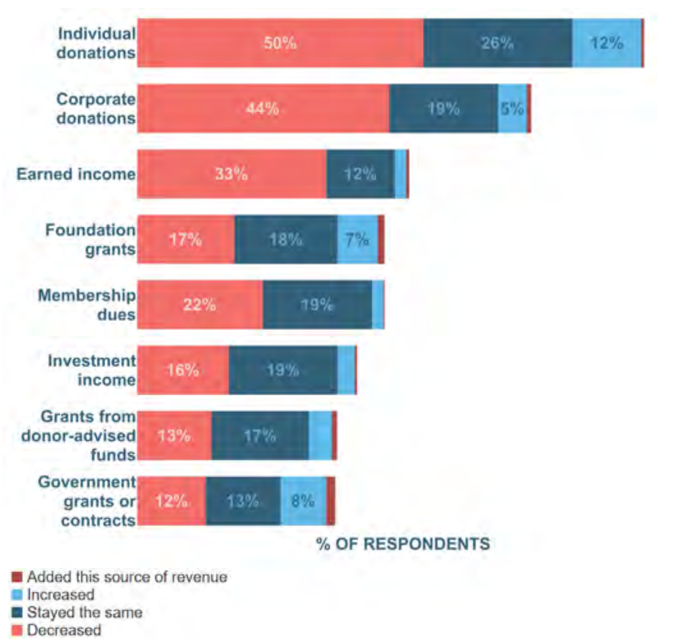
Some nonprofits applied for and received money from the Paycheck Protection Program (PPP). About 4% of PPP loans ($40 million) protected nonprofit jobs (7,000), whereas about 96% of Central Ohio PPP dollars ($1 billion) sheltered 185,000 jobs in the private sector (Figure 7).[11] While a relatively small share of the PPP loan program was utilized by nonprofits, they had enormous value for the organizations that used the funds, and interviews with social sector leaders suggest that many human service nonprofits applied for and received these supports. A survey of local health and human services organizations suggested that 80% of the 76 respondents applied for and received PPP loans.[12]

Figure 5. Sources of Nonprofit Funding
United States, 2019



SOURCE : National Council of Nonprofits

Figure 6. Nonprofit COVID-19 Funding Impacts
Ohio, 2020



SOURCE : Philanthropy Ohio

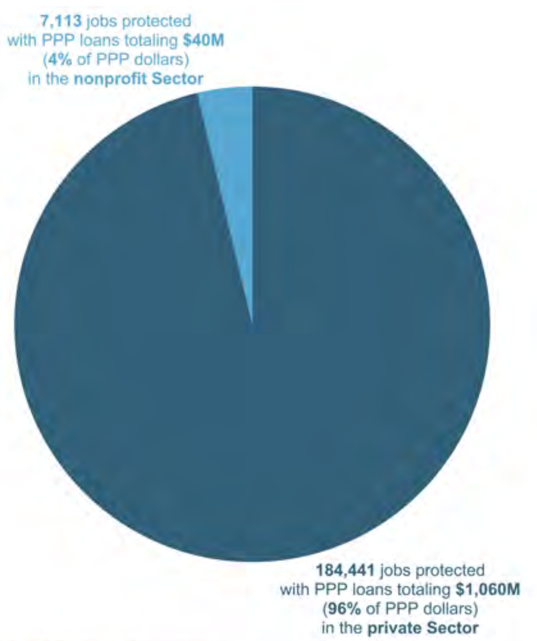
Typically, non-emergency funds for human services are channeled through state and municipal-run programs, as well as human service nonprofits. However, the economic impacts of COVID-19 have the potential to stifle these revenues in the long run, in the absence of continued relief. Nationally, the impact of revenues that would translate to funds distributed to state, local, tribal and territorial governments is projected at $555 billion over state fiscal years 2020 – 2022.[13] This projection has drawn national interest toward assistance specifically targeting stability of vital services these funds typically support, which include funds for critical human services.

Philanthropic giving generally makes up a small but vital share of overall nonprofit funding streams, but it can offer more flexibility and responsiveness to immediate or changing community needs. These sources have experienced some encouraging increases as the pandemic continued. The Columbus Foundation 2020 ERF grant distribution was over $7.2 million and represented a combination of drastic reallocation of grant funding and increased corporate and individual giving.[14] The Big Give raised $32.5 million for nonprofits in 2020, an increase of 81% from the previous Big Give in 2017.[15] UWCO ERF grant distribution was $2.4 million as of August 2020 (Figure 8).[16]

Nationally, there was an increase in contributions to donor-advised funds and #GivingTuesday contributions (both up more than 20% over 2019), which show the commitment of individual donors to addressing the COVID-19 economic fallout.[17] Emergency response giving is an important piece of the nonprofit funding puzzle, but is not necessarily enough to keep struggling nonprofits afloat on its own—other interventions will still be necessary in what promises to be a long, slow recovery.

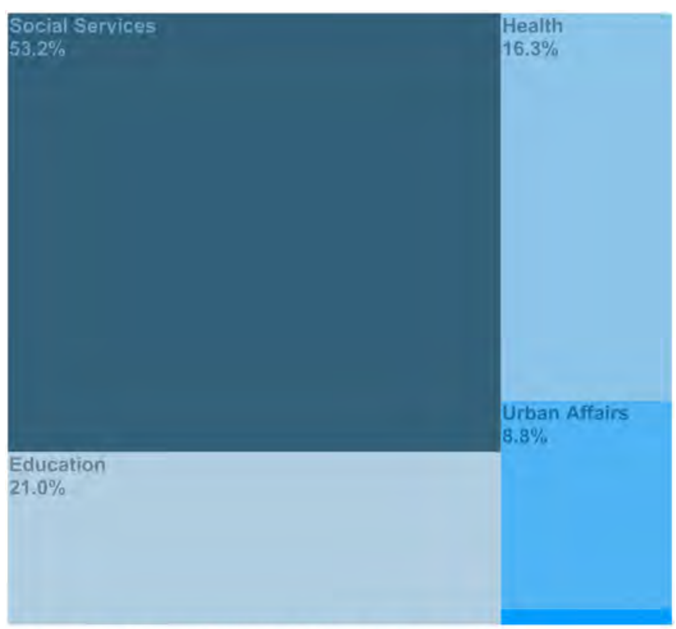
The COVID-19 pandemic provides a rallying point for giving and philanthropy in the community, and community members have been generous to specific causes. Yet, the community leaders interviewed anticipate that tax revenue will be down, and philanthropic giving may not be enough to meet all the need. In the City of Columbus, municipal income tax is the primary revenue stream for the general fund (76%) which is expected to take a hit if there are long-term shifts to remote work (read more on this in the Economic and Community Development brief) or sustained employment reductions in at-risk industries (more on this in the Employment and Small Business brief).[18] One person mentioned the possibility of levies to help meet social service demands on systems. Another suggested redistribution of local government budgets. The region will have to prioritize needs, communicate effectively, and coordinate efficiently to come close to meeting social needs as the community and individual residents work to recover from the pandemic.

Figure 7. Paycheck Protection Program (PPP) Loans
Columbus MSA, As of March 2021



SOURCE : Small Business Administration

Figure 8. Emergency Relief Funds
Distribution of Dollars Awarded by Category
2020



SOURCE : The Columbus Foundation & United Way of Central Ohio
Categories not labeled : Conservation (0.5%); Arts & Humanities (0.1%)

EMERGENCY DELIVERY OF HUMAN SERVICES

Delivery of human and social services by community-based nonprofits presents an opportunity to meet the nuanced needs in communities. Community foundations and social service institutions are positioned at the heart of this work, looking across the ecosystem of service needs to coordinate and prioritize the distribution of philanthropic funds. With the region's strong growth comes an increasing demand for services and resources.

The pandemic catalyzed steep declines in human service delivery. In July 2020, 70% of nonprofit programs were either halted or operating with limited capacity (Figure 9). Service delivery reductions paired with increased service demand sparked an "all-hands-on-deck" response from the health and human services community. Especially where critical needs emerged (e.g., food pantries, behavioral health, homelessness and housing supports), nonprofits adjusted quickly and effectively either through implementing safer in-person service delivery, or by embracing technological approaches like telemedicine. All of this illuminated opportunities for improvement around strategic coordination of resource delivery to increase operational agility and enhance the efficacy of the sector.

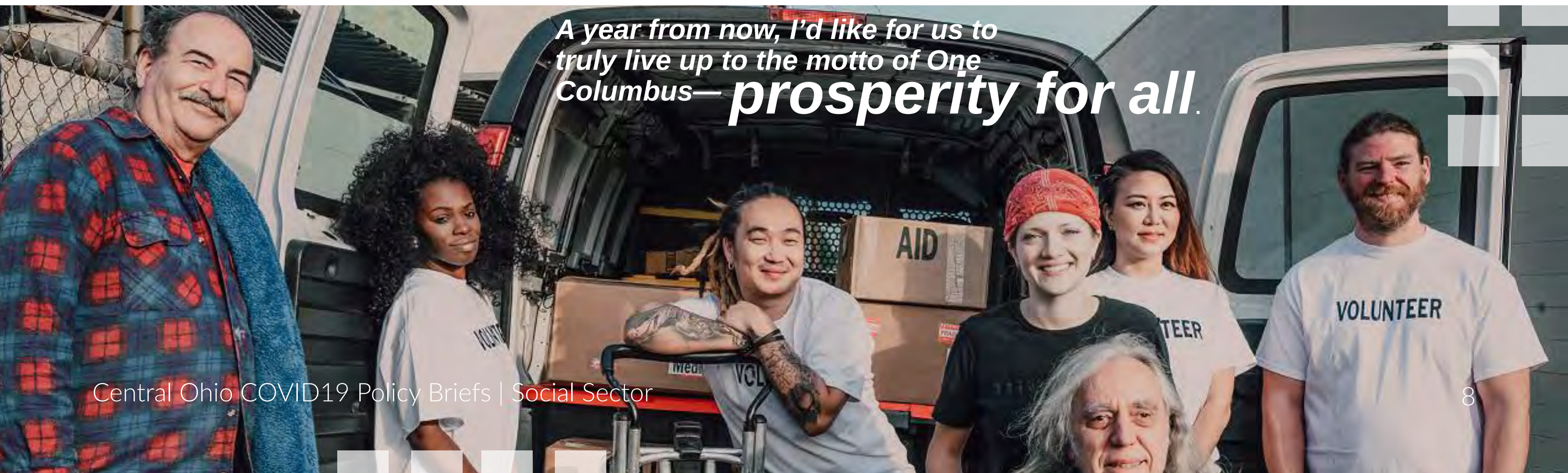
Central Ohio social sector leaders say they hope that novel adaptations will become permanent operational improvements. These improvements did not come without growing pains, however, and there are still nonprofits in need of supports. Early in the pandemic in May 2020, 70% of nonprofits reported a need for assistance, especially with technology, strategic planning, and human resources (Figure 10). Many of these needs persist.

The pandemic magnified the need for intentional local braiding of resources, and interviewees want to continue to build on local coordination post-pandemic. "We need to be cognizant of who's doing what, and how quickly," one staff member of a grantmaking organization stated. "Too often, when our community comes together, we're omitting a really key group from that, not necessarily intentionally, but because things are moving fast." Key groups include, but are not limited to, cities and townships, counties, federal funding stream representatives, non-profits, health systems, education institutions, neighborhood-based organizations, and other community leaders.

There is also an opportunity to build greater intentionality into racial equity in the distribution of funds. Taking care up-front to ensure funds are elevating the work of effective nonprofits with leaders of color, serving the needs of communities they represent. One example is the Equity Now Coalition—a group of elected officials and nonprofit leaders working on "facilitating the design and implementation of a collective impact strategy to achieve equitable outcomes for the Black Columbus."[19] Furthermore, organizations delivering supports to residents impacted by racism are rethinking how they prioritize and operationalize funds to ensure an explicit understanding of who is being served, and whether social service programs are effective in helping residents overcome structural hurdles.

Nonprofits are a small but critically important part of a complex ecosystem that supports human service delivery. While these organizations can (and often do) serve important roles in serving residents who have been impacted by structural racism, removing those structures will take far broader change and greater strides in realizing diverse leadership in the private, public and nonprofit sectors, not only within administrations and C-suites, but within councils and boards.

"[In a year I want to see] Tangible ways that everyone has the opportunity to participate fully in the recovery," an interviewee stated. "[We need to] have equity as the lens that we're looking through in terms of serving low-income people and people of color… we'll see more minority businesses and job growth among minority businesses; greater participation from larger entities and corporations to provide not only financial support, but technical support to help the smaller organizations where most of the job growth takes place. So a year from now, I'd like for us to truly live up to the motto of One Columbus—prosperity for all."



In part, improvements to operational agility were realized through targeted technical assistance for nonprofits and leveraged partnerships with larger organizations. For instance, the Human Service Chamber of Franklin County (HSC) discussed its shared services for its members. HSC has served as a central resource for acquiring personal protective equipment and general legal guidance to ease the burden on its nonprofit members. Another example, IMPACT Community Action created memorandums of understanding and partnership agreements with 20 smaller nonprofits to share revenue to help process rental assistance for the soaring demand.

Other adaptations are technology-driven, improving the discoverability of the ever-changing landscape of resources and services to improve efficiency for providers and clients. IMPACT Community Action is creating a centralized client relationship management system so that the organization and its partners can coordinate and collaborate to serve families. Discussed in more detail in the Technology and Broadband Access brief, the civic technology community, like the Can't Stop Columbus initiative, was an important player in developing resources for enhanced virtual service delivery for under-resourced service organizations.

The stress on nonprofit frontline workers at places like food banks, homeless shelters, and behavioral health facilities was also noted. While social services professionals have risen to the occasion, they have also been mentally and emotionally challenged by the pandemic and the volume of demand. These secondary impacts are discussed further in the Public Health brief. Additionally, nonprofit workers have struggled with absences due to COVID-19 illness and quarantine as a result of being on the front lines of service delivery, which hamper operational capacity on top of the health impact to workers and their families.

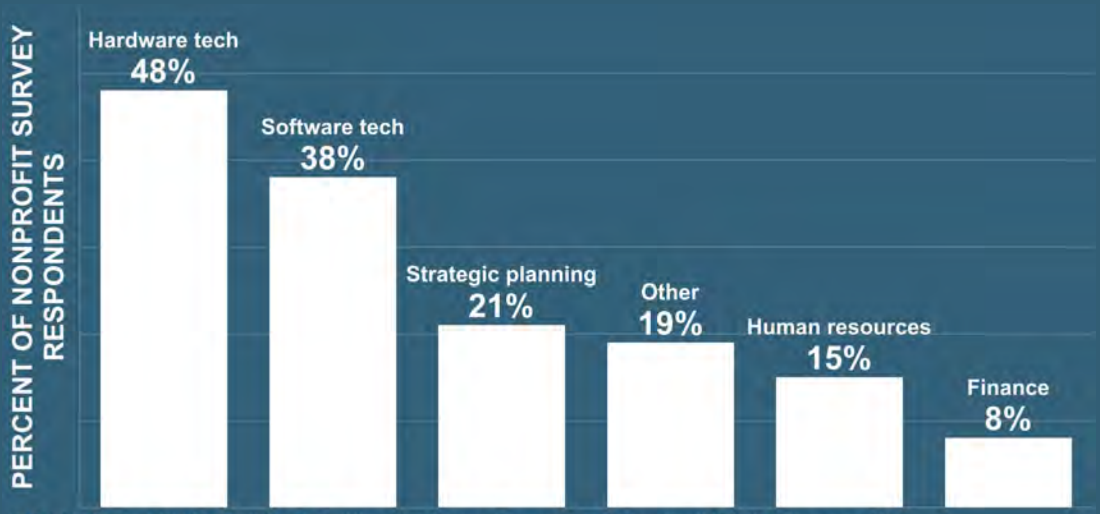
Figure 9. Nonprofit Service Delivery Impact

Central Ohio, July 2020

SOURCE : UWCO, HSC & Illuminology Survey of Central Ohio Nonprofits

Figure 10. Nonprofit Needs

Central Ohio, May 2020



SOURCE : UWCO, HSC & Illuminology Survey of Central Ohio Nonprofits

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CENTRAL OHIO
COVID-19
POLICY BRIEFS

MID-OHIO REGIONAL
MORPC
PLANNING COMMISSION

TECHNOLOGY & BROADBAND ACCESS

Summary

Just two decades in, the twenty-first century has been a time of remarkable technological advancements that impact nearly every aspect of life. The ways in which people use technology to engage in real-time for work, socialization, civic action, or completing day-to-day tasks like shopping, entertainment, or banking were previously a matter of convenience in many cases. In Central Ohio, there has been a growing interest across sectors in the ways that technology could enhance the region, with local leaders exploring ideas around building Smart Cities through things like digital infrastructure and connected vehicles.[1] Furthermore, leaders are setting agendas for building data capacity and partnerships to improve data-informed decision-making, and especially to support more equitable outcomes in planning and policy decisions.[2]

Virtual life went from convenience to necessity when the pandemic shutdowns began in March 2020. Some people, businesses, and institutions were ready for the abrupt change to a predominantly remote world, but still others were less prepared.

Key Issues

A symptom of a long-developing **digital divide**, many Central Ohioans experienced a rocky transition to virtual life due to lack of access to affordable high-speed internet or adequate devices to support intensive technology use for things like remote work and school.

Even with measures to arm residents with technology tools, many in the region still fell behind due to low or limited **digital literacy** and a lack of services and resources to support residents who were less confident navigating virtual resources independently.

Many institutions were underprepared to make the leap from in-person to virtual operations and service delivery. The public and social sectors, small businesses and the arts had challenges and successes in the rapid **transition to virtual institutions**.

The reduction of physical community and civic engagement spurred the use of real-time technological interaction as a growing mode for **building community connectivity**.

DIGITAL DIVIDE

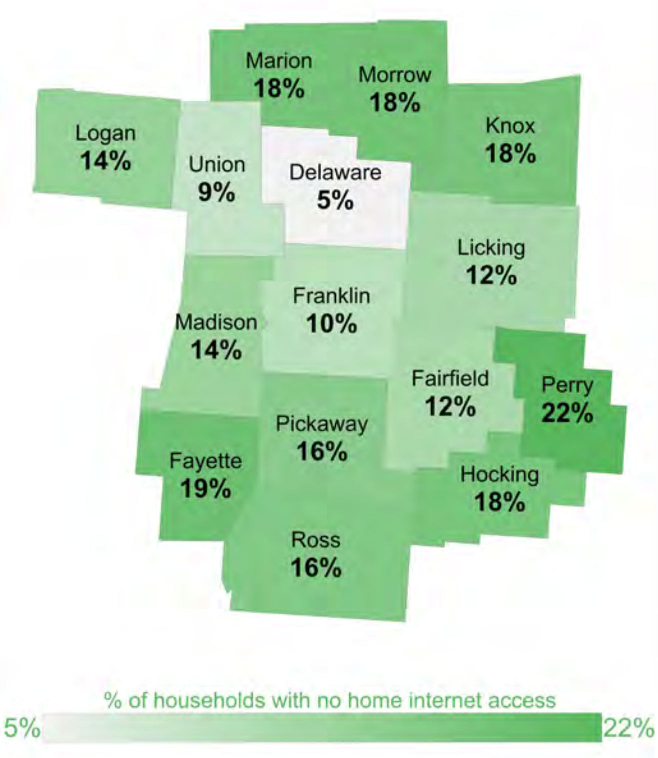
For decades, the “digital divide”, or the gap in access to digital resources, has been a growing topic of research and policy concern driven by three elemental components—devices, broadband access and adoption, and digital literacy. It is necessary to address all three together to close the digital divide.

Broadband access is a challenge for households throughout Central Ohio for several reasons. Rural areas still face significant infrastructure gaps, and in urban and suburban communities where broadband infrastructure is nearly ubiquitous, affordability and adoption hurdles exist for some residents. In 2019 in some of the region’s most rural counties, nearly one in five households lacked home internet. In Franklin County, one in ten had no home internet. Among households that have home internet, there are disparities in connection speed and in access to appropriate devices. An analysis of Columbus broadband challenges produced by AECOM suggests that there are geographical disparities in internet speed, which can be a limiting factor in how effectively home internet can be used for things like remote school, telework, or telehealth (Figure 1).[3]

The quality or appropriateness of devices also makes a difference in how effectively a person can use technology for school, work, or healthcare. According to the Franklin County Digital Equity Framework, “low-income residents are much more likely to rely upon a mobile phone as their only computing device.[4] While mobile devices offer convenience and are useful for intermittent internet access, they generally do not meet the needs of remote work or school, and relying on them as the sole source of access can significantly limit a person’s ability to engage with digital resources.”[5]

More than 206,000 households (25%) in the Columbus MSA lack a cable, fiber, or DSL internet account. Of those, 84,000 have internet only through a cellular data plan, and another 79,000 have no home internet subscription of any kind. Lack of broadband disproportionately impacts low-income households. Households with an annual income less than $35,000 make up 24% of households in the MSA, but account for 64% of those without broadband (Figure 2). Lack of home internet is also prevalent in older adult households (51,000, or more than one-third, lack a computer or home broadband). Digital equity disparities also exist among households of color - Black or African American and Hispanic or Latinx residents make up 20% of the population but represent 30% of residents without a computer or home broadband (Figure 3).[6,7,8]

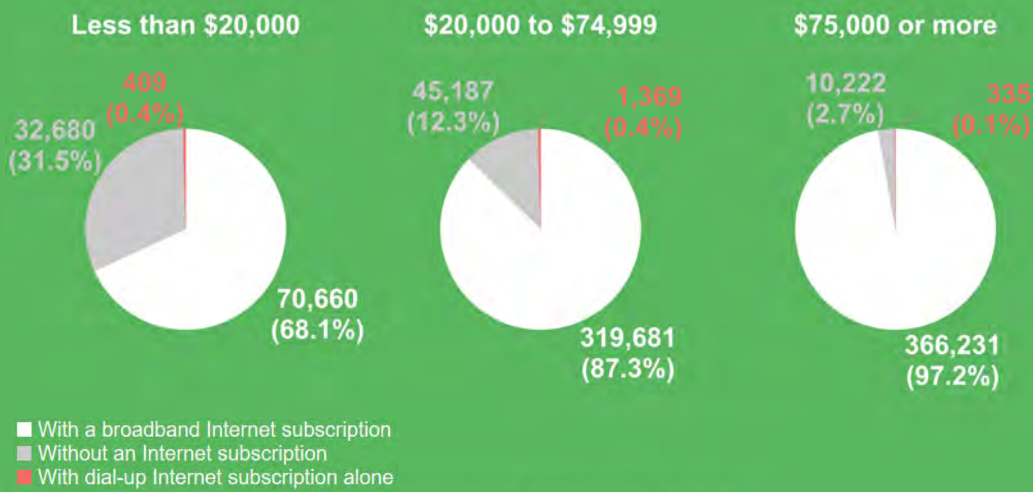
Figure 1. Households with No Internet Access
Central Ohio Counties, 2019



SOURCE : U.S. Census Bureau American Community Survey

Whether the issue is lack of infrastructure or affordability, limited options and lack of competition too often result in poor performance and high costs for consumers. Many areas are served by a single Internet Service Provider (ISP). In some cases, apartment tenants are restricted to a single ISP as property owners sign exclusivity options with one company. Standard broadband internet service has an estimated cost between $45 and $100 per month, not including costs for equipment, taxes, and other fees.

The pandemic led to a widespread shift to remote learning and work—initially, nearly all K-12 and college students were engaged in remote learning, and many employers required staff to work from home. By April 2021, all Central Ohio public school districts were either open five days a week, or in a hybrid model. However, many students and families were still opting for remote options. Statewide, estimates from the Census Household Pulse Survey suggest that 800,000 (41%) K-12 students in Ohio were still engaged in remote learning at least 3 days a week even in March 2021.[9] The pandemic made clear the importance of digital connectivity for students to access key educational resources and excel outside of the classroom, even after in-school classes have fully resumed. In addition to the surge in students learning remotely, the same survey suggests that 3.3 million (37%) Ohio households had at least one adult engaged in telework as a result of the pandemic.[10]



SOURCE : U.S. Census Bureau American Community Survey

Figure 2. Home Internet Access by Household Income

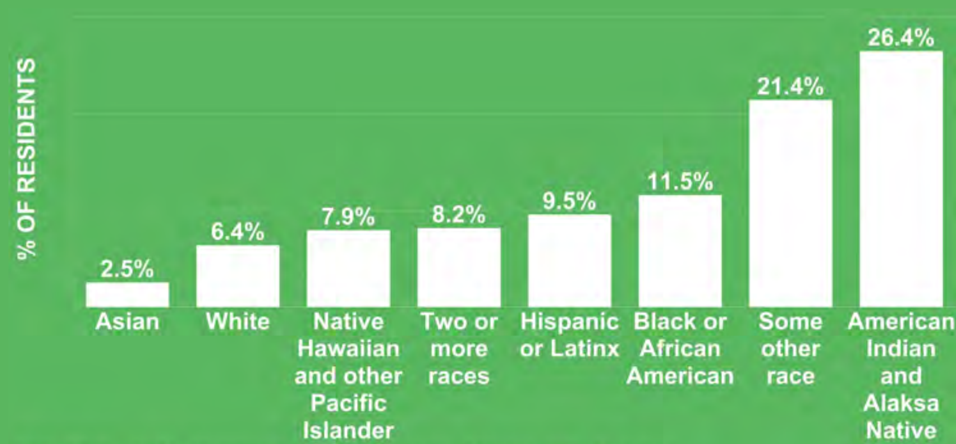
Columbus MSA, 2019

SOURCE: U.S. Census Bureau American Community

Figure 3. Households Without Broadband or Own Computer by Race & Ethnicity

Columbus MSA, 2019

SOURCE: U.S. Census Bureau American Community Survey

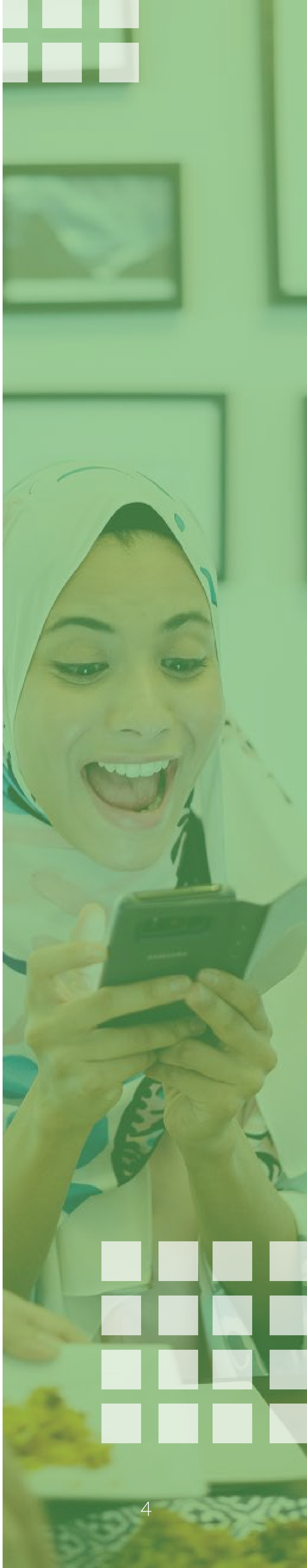


The need for devices and home internet access became imperative, especially for districts that were not already providing devices to students on loan. With libraries also closed for a period, then later reopened with limited capacity, the alternatives for students without home internet or adequate devices were limited at best. Throughout 2020, school districts, local governments, and other organizations worked to secure funds from the Coronavirus Aid, Relief, and Economic Security (CARES) Act to improve access to technology and internet as part of their remote learning plans. Some districts purchased computers for students to use on loan from the districts or refurbished computers to give to families indefinitely. Many ISPs offered temporarily free or reduced-cost internet service to qualifying families, opened community hot spots as a free Wi-Fi access option, or provided Wi-Fi hotspots for families to use in their homes.[11]

With each subsequent federal relief funding package, there has been an abundance of funding to address the digital divide. CARES Act funds were not specifically earmarked for digital equity, but many state and local governments used funds for these purposes. The Consolidated Appropriations Act funds in late 2020 included a provision for direct subsidies for residents through the Emergency Broadband Benefits, as well as funds designed to fill gaps in broadband infrastructure. The American Rescue Plan (ARP) Act includes multiple broadband-specific programs, targeting investments in libraries, school districts, states, and others. The funding is abundant, but complicated, and presents both an opportunity and an added burden, on already taxed organizations, to spend those dollars in a coordinated way, collaborating to make strides toward digital equity as efficiently and effectively as possible.

The pandemic has cast a light on the already-present disparities in access to suitable internet and technology for high-efficacy engagement in virtual environments. Some of the shifts to virtual school, work, institutions, and even community life that were accelerated by the pandemic will be permanent. Because of the digital divide that persists in Central Ohio, access to these virtual pathways and opportunities remains exclusive.

Local leaders rallied around digital equity challenges with greater energy beginning in 2020, as the issue was magnified by the COVID-19 pandemic. In 2020, a new group formed that developed into the Franklin County Digital Equity Coalition, consisting of more than 30 local organizations working collaboratively to address digital equity needs for Franklin County. The group published a framework report in March 2021 that outlines these issues in greater detail.



DIGITAL LITERACY

Alongside broadband access and devices, the third pillar of the digital divide is digital literacy. Low digital literacy is, in and of itself, a deterrent to broadband adoption. The skills needed to work effectively in virtual environments are not universally understood, let alone the skills to troubleshoot confidently when there are problems with equipment or the resources a person is trying to use.

A 2015 Pew Research Center survey found that more than half of adult Americans lacked what they call “digital readiness” (Figure 4), a set of skills that would allow them to use internet and technology for more complex tasks like online learning. Americans who possessed digital readiness were more highly educated, younger, and had higher incomes than those who lacked this skillset. These people were not only more comfortable using and troubleshooting the technology itself, they were also more confident in their ability to discern and seek trustworthy information.[12] That same study suggests that only 17% of adults are “highly prepared” to use technology for online learning. A 2019 Pew Research Center survey found that many American adults were unsure about or incorrectly identified important internet security and privacy topics, like how to make sure a website they are using is secure and identifying phishing scams.[13]

In Central Ohio, numerous organizations provide digital literacy and technical support services, but it is a disjointed and patchwork system, with many organizations serving certain clientele or meeting specific needs. There is not a universal and easily navigable resource to direct those in need to the appropriate digital literacy supports. The digital literacy and skill-building resources that do exist in Central Ohio seem to be disproportionately targeted toward training people for technology-based careers, and thus require users to begin from a higher base level. These resources are important workforce development tools, but there remains a critical gap in basic skills training resources that would support residents starting from a lower level.

As a catalyst for widespread transition to virtual learning, work, institutions, and communities, the pandemic made it immediately clear that internet and devices alone were insufficient to address the digital divide. With national research suggesting that as few as one in five adults are highly proficient technology users, it is unsurprising that this became such a pronounced issue for Central Ohio households. As a legal requirement that districts and households must fulfill, K-12 remote education presents a clear case study for the critical importance of digital literacy in overcoming the digital divide.

In remote K-12 education, even with efforts to get families connected and keep them engaged in remote learning during the transition, many students remained difficult to reach. Statewide, chronic absenteeism increased 16% for elementary students, and 11% each for middle and high school students. The extent to which digital literacy contributed to this increase in the 2020 – 2021 school year is uncertain, but it is a likely factor for many households. The increase was greatest in urban districts compared to rural districts and was far greater among Black students than other races and ethnicities.[14]

Digital literacy uniquely impacts some groups of the population. Layering onto the complexities of navigating technology for advanced tasks like remote learning, some students like pre-readers, young children, students with limited English proficiency, students with learning differences, and students with disabilities were all engaged in remote learning.

National research reports that while 36% of the native English-speaking population had ‘high proficiency’ navigating internet and technology problem solving, only 12% of non-native English speakers had the same proficiency level.[16] The Columbus City School District alone served around 7,800 students who qualified for supports due to limited English proficiency, and around 8,000 required special education due to cognitive or physical disabilities.[15] In these households, students’ success was largely dependent on the presence of caregivers in the home able to dedicate time to navigate remote learning with their students, and with the digital literacy skills and confidence to provide that support.

Disparities in work opportunities are another clear example of the impact of the digital divide. Many Central Ohioans lost work or were unable to work in the pandemic due to health concerns or family care responsibilities. Limited digital literacy was a prohibitive factor in finding remote work options for many, and even finding work that does not require high digital literacy was more difficult in the pandemic, as many job search tools and applications are conducted completely online. Access to human services and programs, civic engagement, community engagement, and basic needs (e.g. groceries and banking) were also shifted near-exclusively online in many instances.

In many cases, the pandemic amplified a troubling paradox. The people who most needed support (e.g. housing assistance, supports for students, and job help) were also the most likely to struggle with effectively interacting with those resources online.

The National Digital Inclusion Alliance offers a proposed model for addressing this paradox. The pandemic shunted many resources, civic engagement, and supports online, while also closing or limiting capacity of anchor institutions like libraries. Libraries have filled an important role in community access to computers and internet, and special supports for K-12 students and job seekers. However, these were already inconvenient options for some. NDIA suggests the pandemic could open a door to more stable, convenient options for residents. The "digital navigator model" pairs individuals with trained navigators to connect them to digital literacy training, devices, internet, and support navigating online resources while they are in the process of building skills and confidence.[17] Funding available through the federal ARP presents an opportunity to consider novel approaches to making meaningful and lasting strides in bolstering digital literacy as a means to narrow the digital divide.

52%

Relatively hesitant

14% **The Unprepared**
- Relatively lower levels of tech adoption
- Do not use the internet for learning
- Need help setting up new tech devices
- Not familiar with "ed tech" terms
- Lack confidence in computer skills and find online information untrustworthy

5% **Traditional Learners**
- Active learns who have technology
- Not as likely to use the internet for learning
- Have concerns about trusting online information

33% **The Reluctant**
- Higher levels of digital skills
- Low levels of awareness of new education technology concepts
- Low use of internet for learning

48%

Relatively more prepared

31% **Cautious Clickers**
- High levels of tech ownership
- Confidence in online skills and ability to find trustworthy information
- Less familiar with online learning terms
- Less apt than Digitally Ready to use online tools for learning

17% **Digitally Ready**
- Ardent learners for personal enrichment
- Have technology and are confident about their digital skills and abilities to find trustworthy online information
- Know the most about online learning resources

Figure 4. Digital readiness: The five groups along a spectrum from least ready to most ready

% of U.S. adults in each group

Source: Survey conducted Oct. 13 - Nov. 15 2015. "Digital Readiness Gaps" Pew Research Center

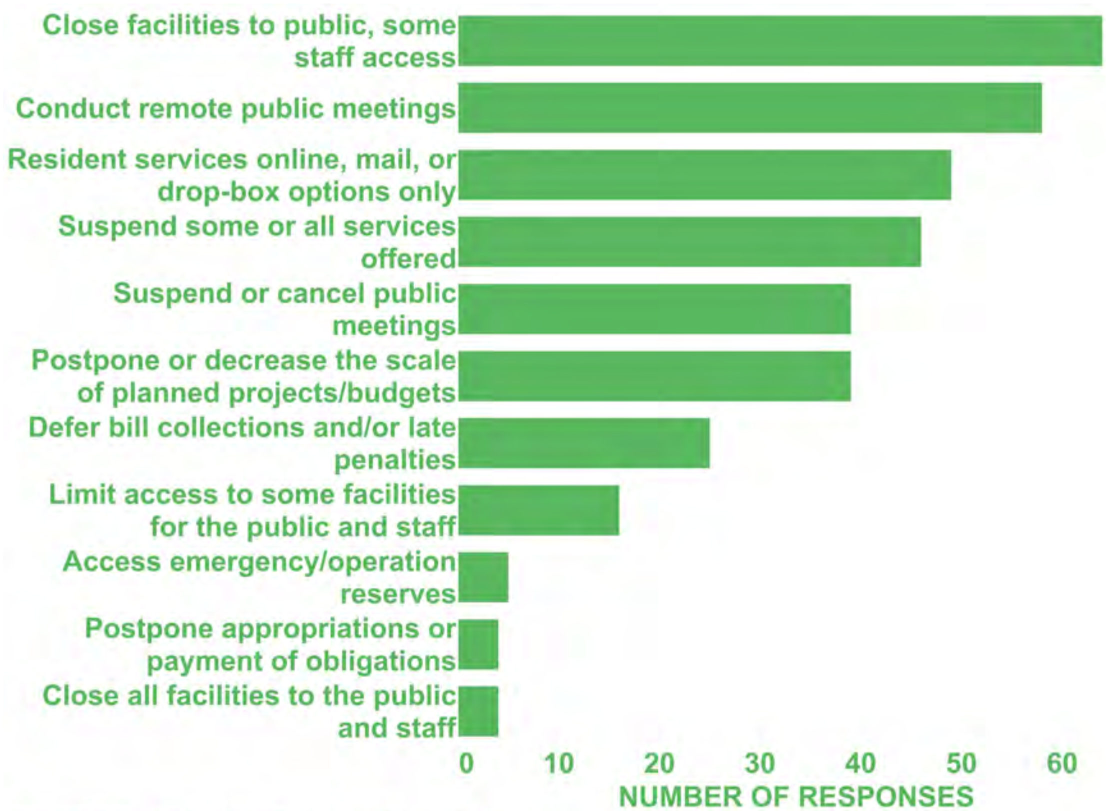
TRANSITION TO VIRTUAL INSTITUTIONS

Despite the incredible social transformation spurred by the internet and technology in recent decades, some sectors have been slower than others to create virtual analogs for in-person experiences or processes. The public and social sectors, small businesses and the arts have generally lagged private sector companies in developing strong, user-friendly virtual tools and engagement with customers and constituents. In part, these sectors are limited by the populations they serve—equitable delivery of services and resources is less attainable so long as there is a digital divide. They are also limited by the types of services they deliver, many of which have historically centered around face-to-face interaction. These sectors can also be stunted in their technological acceleration by things like bureaucratic red tape, low investment in operational enhancements, limited connectivity of data across departments or organizations, and limited resources and skillsets for investment in user-centered design of websites and applications.

In the early weeks of the pandemic, a survey of local governments conducted by the Mid-Ohio Regional Planning Commission showed that the immediate operational changes spurred technology solutions in some instances. In the first week of April 2020, most local government survey respondents had closed to the public and limited staff access. Following brief pauses, most quickly pivoted to hosting public meetings remotely, and providing online, drop-box, or mail options for resident services (Figure 5).[18] For many local governments, a lag in technological advancements meant this was a sudden and jarring shift to remote operations. In some cases, adoption of virtual alternatives worked well, while in other cases there were persistent concerns.

On the one hand, the COVID-19 pandemic dissolved some of the previous barriers to technological acceleration. The need to create safe, contactless processes for service delivery led to some enhancements. Interviews with local government staff indicated that services like remote property and buildinginspections were adopted as a result of the pandemic, as was the removal of some steps in building and zoning processes like in-person hand-off of building plans. According to interviewees, process changes like this would have been slowed down by bureaucratic approval requirements in a pre-pandemic world.

Figure 5. Local Government Changes to Operations
Central Ohio Local Governments
Apr 2 - Apr 6, 2020



SOURCE : MORPC Survey of Local Governments

Other enhancements were noted by interviewees. While many residents have fallen further behind in the digital divide, others have become more comfortable operating in virtual environments. Public meetings, some of which were previously conducted in person as a statutory requirement, were permitted to be conducted online as a result of the pandemic.[19] Virtual community engagement and public meetings have been well adopted by some community members. For those with access, the online version of these modes of civic engagement could encourage more public participation as time and logistical barriers are removed when people can log on from anywhere.

Beyond government-led public meetings, interviewees suggested that other less formal engagement in civic- and service-oriented organizations (e.g., My Brothers Keeper, New American Leadership Academy) was bolstered by the convenience of remote meetings or the ability to engage after the fact by watching pre-recorded content on their own schedule. While interviewees were supportive of permanent virtual civic engagement pathways like continued remote public meetings, they also suggested a need for enhancements to ensure effective meetings such as two-way communication with participants, and cited the need to be aware of limitations around trust-building in these settings. In fact, several interviewees mentioned building empathy and connection with community members as a prerequisite to technology-based engagement, both within public and human services.

The social sector was also challenged by the abrupt shift to contactless and, in some cases, technology-enhanced service delivery. Surveys of Central Ohio nonprofits suggested a persistent need for support with technology within the sector, whether for remote work, coordination of services and resources, or tools for resource discovery among those they serve (see more about the impacts on nonprofits in the Social Sector brief). As the pandemic accelerates technology innovation in both the public and social sectors, the need to build connectivity of data and information behind the scenes, and to develop intuitive, user-friendly tools to access resources, services and information becomes greater.

Can’t Stop Columbus is a group of civic technology volunteers that emerged as an important resource to support the growing technology needs of the public and social sectors, small businesses, and the arts. While the volunteer organization could not fill every technological need for delivering public and human services, they made significant contributions to things like acquiring and delivering Personal Protective Equipment, collecting food donations and getting meals to residents, and bolstering small businesses. This emerging volunteer civic technology community could serve as a long-term opportunity to partner those with technical skills to the sectors that have limitations in technology solution development.[20]

Can’t Stop Columbus also provided support to the small business community (see more in the Employment and Small Business Brief), as well as technology-based supports for local artists. The Columbus Arts Hub was developed as a resource to support local artists with establishing an online presence through virtual concerts, online art classes, and online artist profiles.[21] There were some efforts to have online events and marathons of artists, many driven and led by artists rather than arts organizations, and artists grew in their use of technology to create art not just to share art. An interviewee from The Greater Columbus Arts Council acknowledged that this was a scramble, initially, as many artists independently found technology and venues to create an online presence before shared technology investments were established.

BUILDING COMMUNITY CONNECTIVITY

Nationwide, there was an increase of 11 million (3.7%) internet users and 10 million (4.3%) active social media users from January 2020 to January 2021, many of whom were new adopters - the population overall grew by only 1.9 million or 0.6% during the same period (Figure 6).[22]

This increase in internet and social media users is indicative of the pandemic's disruption of many facets of life, from work, to school, to business. It also points to a fundamental disruption of community life. Social gatherings, neighborhood block parties, and community events were largely arrested by the safety concerns around COVID-19. With many aspects of life shifting to a virtual environment, so too did community engagement and informal political and civic action.

One prime example of civic action through volunteerism is the Can't Stop Columbus initiative. Can't Stop Columbus developed rapidly in Central Ohio at the onset of the pandemic, leveraging existing technology-focused groups (e.g., Smart Columbus, Tech Life Columbus, and Give Back Hack). The overwhelming volunteerism germinated in response to the growing needs in the region's communities, and the limitations on the public and social sectors in filling those needs or connecting residents to resources. The organization grew to over 1,700 volunteers, operating almost exclusively online, with the mission statement, "Can't Stop Columbus is a community-wide movement that addresses problems that have arisen due to the COVID-19 crisis. Activating our city's talents and passions, we're putting bold ideas into action to deliver real solutions that unite our community."[20]

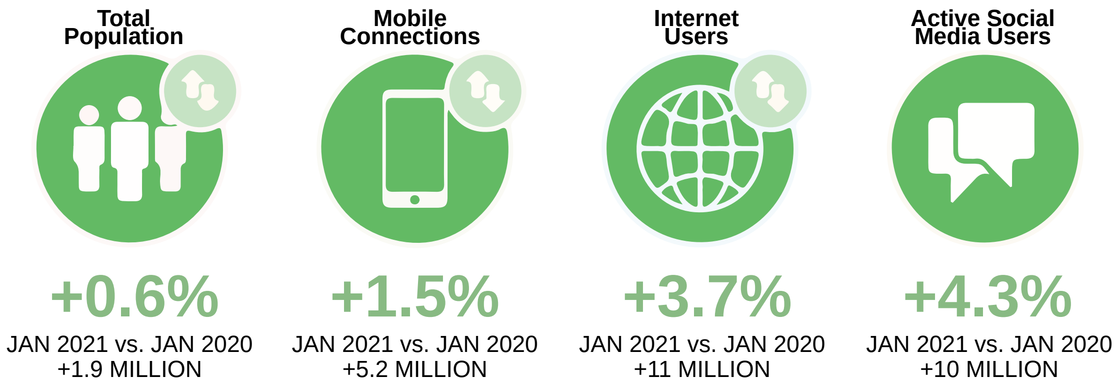
Informal civic engagement increased on social media during the pandemic, some national research suggests. Some of the increase was observed among young people, especially centered around national political issues, like the presidential election, and the swelling racial justice movement.[23] While political organizing and activism still happened face-to-face, whether through canvassing to "get out the vote", or Black Lives Matter protests in downtown Columbus, the organizing and coordination of these efforts took place largely online. Arguably, access to real-time virtual interaction supported the extra layers of planning and communication needed to ensure these in-person activities could be conducted safely, during the still-raging pandemic.

Other research highlights the value of "online neighborhood social networks" in sharing resources, trading goods and services, and supporting local businesses and artists during the pandemic.[24] These virtual communities burgeoned in the pandemic as tools for swapping information among virtual (or sometimes literal) neighbors about help available for housing, food, unemployment, or information about COVID-19 testing and vaccinations. These platforms also became peer networks for people dealing with similar types of challenges during the pandemic, like parents of remote learners. Whether volunteerism, political organizing and activism, sharing information about the ever-changing landscape of resources and supports, or simply navigating uncharted territory during COVID-19, the level of engagement that occurred would not have been possible without the technology to support real-time virtual interaction.

While the acceleration of virtual communities presents great opportunities for continued civic and community engagement, there are concerns about inclusive access to these virtual civic spaces and the risk of social isolation for those not connected given the still-wide digital divide. Furthermore, the spread of misinformation will remain a persistent concern in virtual civic and political dialogue and in the exchange of information about community resources.

Figure 6. Annual Digital Growth

Year-on-year change in key indicators of digital adoption
United States



SOURCES: The UN; Local Government Bodies; GSMA Intelligence ITU; Eurostat; CNNIC; APJR; OCDH;Social Media Platforms' Self-Service Advertising Tools; Company Earnings Reports; Mediascope; Cafebazaar

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CENTRAL OHIO
COVID-19
POLICY BRIEFS

MID-OHIO REGIONAL
MORPC
PLANNING COMMISSION

TRANSPORTATION

Summary

Central Ohio has been experiencing a trend of growth and urbanization, fueled by strong economic diversity, expanding resources for efficient logistics and transportation, and public-private partnerships driving investments in amenities to enhance quality of life for workforce attraction and retention. The Mid-Ohio Regional Planning Commission (MORPC), along with partners in transportation (e.g., transit, aviation, and active transportation) play a key role in monitoring how the growing region leverages transportation resources and infrastructure, balancing goals around congestion reduction, reduced climate impact, expanded opportunities to bike and walk for work or leisure, and encouraging focused growth to support enhanced transit options.

The pandemic agitated transportation dynamics across modes and has left an indelible mark on the balance of the transportation system of the future. Shutdowns of businesses and services, as well as individuals' personal health concerns provoked changes in transportation behavior across the board – residents, students, workers, businesses, and institutions. Many of these behavior shifts may stick, at least to a degree. In some cases, these lasting shifts may relieve pressure on the transportation system and in other cases they may create new challenges; either way presents an opportunity to explore innovations and reconsider priorities for investment.

Key Issues

Central Ohio experienced a dramatic pause in **traffic congestion** as communities shut down to slow the spread of COVID-19. While traffic will inevitably return as the pandemic is managed, some behavior shifts – how people work, attend school, and where they choose to live – may have lasting effects on traffic patterns and infrastructure demands.

Public transit experienced large reductions in ridership. While permanent shifts to remote work and health precautions may have changed behavior for some, others will rely on transit now more than ever as an economical transportation option as more residents experience financial hardship.

Bike and pedestrian activity increased as more residents turned to outdoor recreation and residents sought alternatives to transit during the pandemic. Overall, fewer crashes involving people bicycling or walking points to improved safety; however, these crashes in majority Black or brown neighborhoods have persisted, punctuating the need for infrastructure safety improvements in historically disinvested communities.

Widespread consumer behavior changes altered **freight and last-mile logistics** in the region. To the extent that these changes endure, there will be lasting pressure created by the increase in direct-to-consumer delivery of goods.

Intercity travel and tourism came to a standstill with the onset of the pandemic. While vaccination and continued health and safety protocols will restore leisure travel and conferences, there will be some permanent shifts to remote meetings which will reduce revenue from business travel.

TRAFFIC CONGESTION

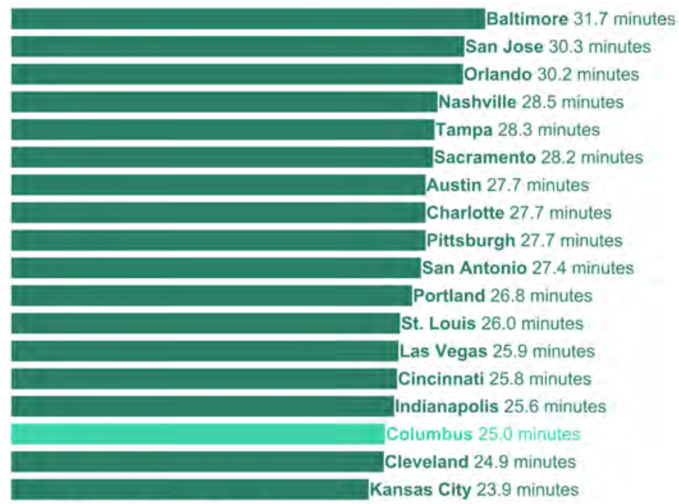
Central Ohio has enjoyed relatively short commute times compared to other, similarly sized metros in the United States (Figure 1). The region has, however, experienced high population growth over about the last decade, which led to an increase in commute times on par with other fast-growing metros like Charlotte and Nashville (Figure 2). This has resulted in increased roadway congestion, and uncertainty for commuters' trip times especially during peak commute hours.

When the first Ohio stay-at-home order was issued on March 24, 2020, traffic congestion decreased significantly. Slowdowns in traffic speed, an indicator of traffic congestion, remained less frequent through late summer 2020 when compared to early March levels. By autumn 2020, severe slowdowns (speed reductions of 25 mph or more) remained rare on Central Ohio freeways, but moderate slowdowns (speed reductions between 10 and 24 mph) became more frequent as some returned to school and offices, and some businesses reopened (Figure 3).

As a catalyst for widespread shifts to remote alternatives to work and school, the pandemic presents an opportunity for sustained congestion reduction. Whether this benefit translates to overall reduction in the number of trips and distance traveled will depend on the degree to which land use patterns are altered by resident behavior.

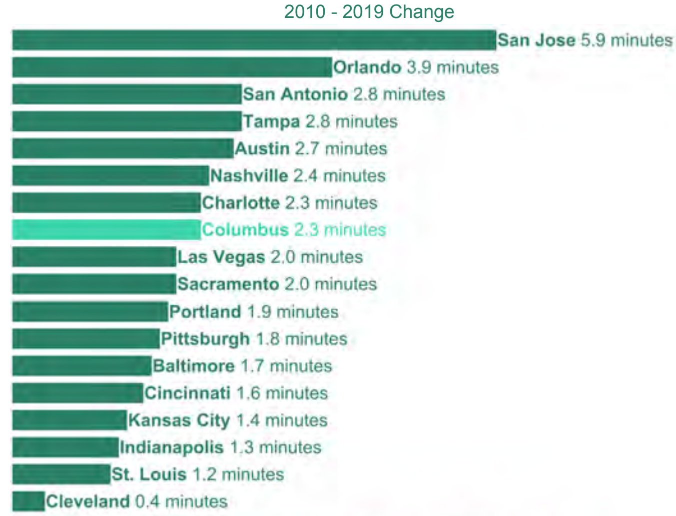
The pandemic brought a large and sudden shift to remote education. Throughout the 2020 – 2021 school year, most school districts and universities in Central Ohio implemented health and safety protocols to allow for a "hybrid" (mix of some remote and some in-person school days) approach. The persistence of hybrid learning is largely dependent upon vaccine distribution and effectiveness. Even as many districts and universities may formally return to in-person learning, they have also made large initial investments in technology to support remote learning, which they are likely to find ways to utilize.

Figure 1. Average Commute Time
Comparable MSAs
2019



SOURCE : U.S. Census Bureau American Community Survey

Figure 2. Commute Time Change
Comparable MSAs
2010 - 2019 Change



SOURCE : U.S. Census Bureau 1-year American Community Survey

Figure 3. Traffic Congestion
7-County Central Ohio Region
March 2, 2020 - December 18, 2020, Weekly

SOURCE: INRIX (via MORPC)

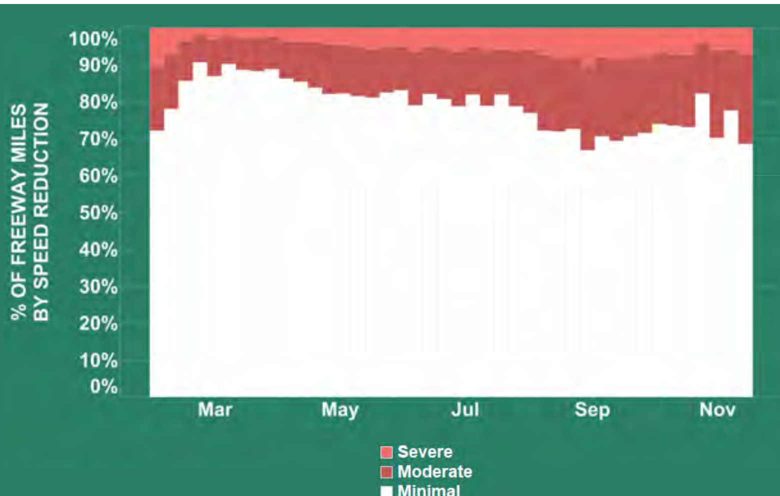
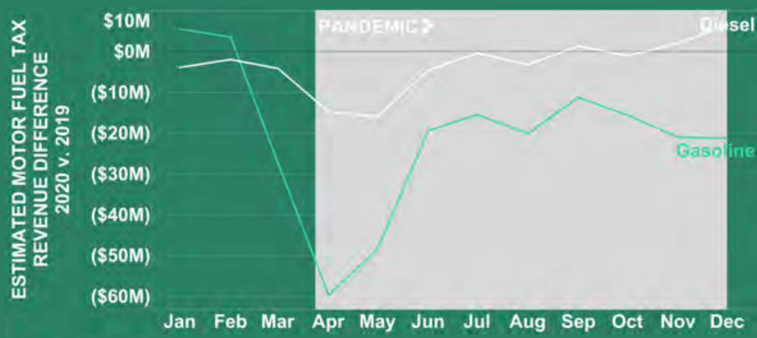
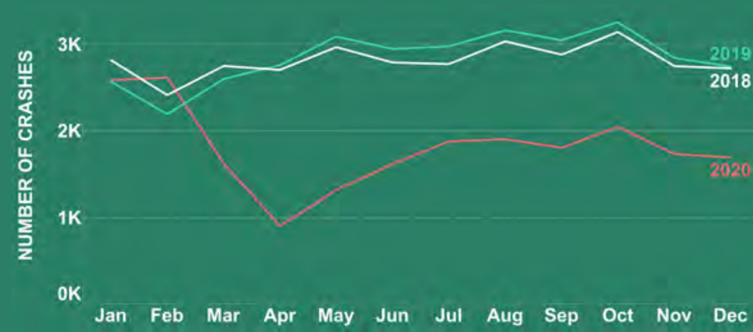


Figure 4. Motor Fuel Tax Revenue
Ohio
2020 compared to 2019, Monthly



SOURCE : Ohio Department of Taxation

Figure 5. Traffic-Related Crashes
Franklin County
2018-2020, Monthly



SOURCE : Ohio Department of Transportation, final (2018 and 2019) and preliminary (2020) crash data

When shutdowns began, employees who could work remotely began working from home. Some employees later returned to some or all in-person work as employers implemented health and safety protocols and stay-at-home orders lifted. By early 2021, however, over 250,000 workers in Central Ohio continued to work from home (up from just 60,000 in 2019). There will be some permanent shifts to remote work and school (discussed in greater detail in the Economic & Community Development brief), which would translate to a reduction of work trips paired with greater flexibility for non-work trips within workers' residential communities.

Shifts to remote work led to changing needs or preferences about where people live and in what type of housing. Spurred by low interest rates, increased personal savings, a need for more space to conduct remote work and school, and shifting lifestyle priorities, some Central Ohioans were purchasing homes in less dense areas of the region (discussed in greater detail in the Housing brief), creating an increase in non-work trips not only in number but in trip length. If residents choose to live farther from the urban core, this would be a shift of the trend toward more dense, urban growth in the 2010s. Insight2050 was an effort that built regional consensus around focused growth and compact development, rooted in an increased understanding of the impacts of past development trends, along with shifting demographics and housing preferences.

Traffic is tied directly to funding that supports roadway infrastructure maintenance, development, and safety through the motor fuel tax. Comparing gallons of gasoline and diesel fuel sold in 2020 to 2019, there was an estimated $300 million reduction to Ohio fuel tax revenues in 2020 – about 10% less than expected. Nearly two-thirds of this revenue loss impacts the State transportation budget, while about one-third of the dollars would go directly to counties and municipalities. Based on prior year local distribution of tax revenues, Central Ohio will see a $20 million reduction from expected fuel tax revenue for local roadway infrastructure spending.

Diesel fuel use reductions made up 14% of that revenue loss, and gasoline made up the other 86%. The greatest impact occurred in April and May during the initial stay-at-home orders. Diesel fuel, used primarily by freight vehicles, restored to 2019 levels by July 2020, and even surpassed 2019 levels by the end of year holiday season – likely a sign of increased parcel delivery driven by the surge in e-commerce. However, gasoline, used primarily by passenger vehicles did not recover to 2019 levels at any point during 2020 after the pandemic onset (Figure 4). This raises further questions about the long-term stability of fuel tax revenues, adding to other impacts on this source of funding like increases in electric vehicles and improved fuel efficiency.

Road safety is also impacted by traffic volume. On interstates, the number of crashes is known to correlate positively with traffic volume—more vehicles on the road means more opportunities for congestion-related crashes like fender-benders. Attributed to increased speeds, other roadways (arterials, collectors, and local roads) have more crashes as volume decreases.[1]

Overall, the decrease in traffic during the pandemic brought about sustained reductions of about 40% in the total number of crashes on the roadways (Figure 5). The bulk of this decline stemmed from decreased traffic volumes on interstates and freeways. Declines also occurred on arterials, collectors, and local roads, but with a few exceptions. Possibly related to increased speeds, there was a notable increase in the number of fatal crashes on arterials, particularly fatalities involving people walking. Related to more local traffic and possibly increased speeds, there was also an increase in the number of serious injury crashes on collectors and local roads. Finally, there was an increase in the number of alcohol-related crashes on collectors and local roads.

TRANSIT RIDERSHIP

Central Ohio saw more public transit use in the 2010s, despite nationwide declines in bus passengers.[2] Growth in transit ridership was attributable to technology-driven system enhancements introduced by the Central Ohio Transit Authority (COTA) to improve customer experiences and provide greater access to mobility options.[3] Among the many new and enhanced services were a comprehensive redesign of COTA's fixed service routes for improved speed and frequency of service (Transit System Redesign), release of the COTA Connector mobile application allowing for cashless fares, and technology-enhanced on-demand services for residents with mobility limitations and for first-mile/last-mile connections. Additional planned enhancements are centered around high-capacity transit corridors as COTA works in partnership with the City of Columbus, other local communities and MORPC on the LinkUS initiative.

The pandemic brought about obvious health concerns related to public transit, leading to 70% declines in fixed route ridership. Health and safety protocols were implemented on public busses (e.g., limited capacity for social distancing, rear door entry). Bus fares were also temporarily waived for all bus riders. Even with these strategies in place, fixed route ridership declines persisted throughout 2020 (50% lower from March to December compared to the previous year, on average) as the health emergency continued (Figure 6). According to interviews with COTA staff, the decline was not consistent. On some fixed routes serving low income neighborhoods, busses were filled to capacity (significantly reduced for safety). Some riders had to be turned away, and in some cases additional busses were added to these routes.

Despite fixed route service declines, there were opportunities to push technology-driven innovations as the change of circumstances catalyzed the adoption of new modes and ways of interacting with the public transit system. Cashless fare systems have been accelerated as a result of the pandemic, and so has adoption of on-demand services. Most notably, service tripled in the first five months of the pandemic for the Uber-style on-demand system for ordering paratransit service, Mainstream On-Demand (Figure 7). Even with the increase in passengers using this new service option, the number of passengers using Mainstream was down 10,000 by August 2020, which likely signals broader challenges accessing key goods and services for residents eligible for paratransit service. Other on-demand service offered through COTA's new COTA Plus program may see greater uptake, especially as employment rebounds.

Figure 6. COTA Fixed Route Passengers
COTA Service Area
2019-2020, Monthly

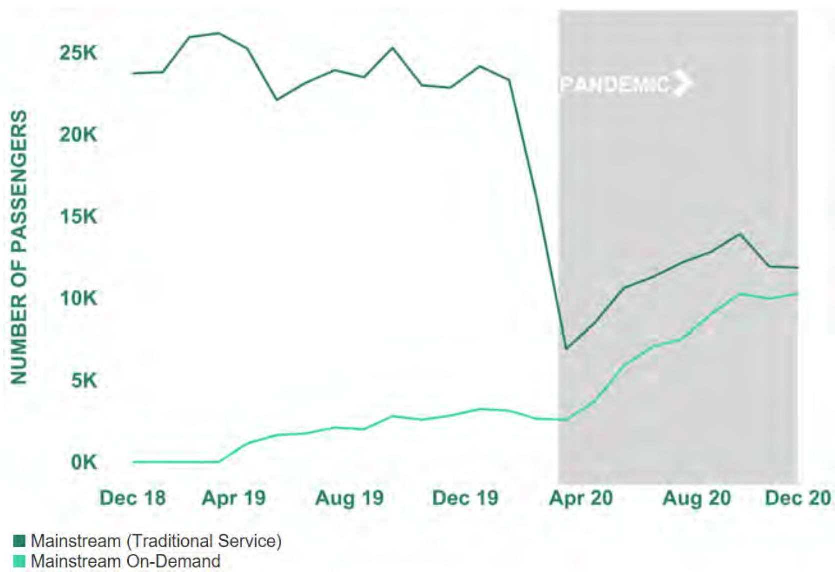
SOURCE : Central Ohio Transit Authority (COTA)

While health concerns will diminish as the pandemic is managed, some previous transit riders may permanently shift modes. Persistent remote work will have clear impacts on the number of transit commuters. Additionally, national data shows a surge in used car sales, which research suggests is in part attributable to transit users opting for personal vehicles as a safer mode of travel (Figure 8).[4] People converting from transit to personal vehicles are not likely to switch back immediately, even when health concerns dissipate. Local data on used car sales are not available, so the extent of this mode shift in Central Ohio remains unclear but is something to consider as other data (e.g., ridership and car travel) are monitored going forward.

While there are questions about public transit use reductions, nationwide, it is imperative to consider that there have also been residents who experienced loss or reduction of employment. The need for reliable, efficient, and economical transit options may reach a new pinnacle of importance, as many Central Ohioans recover their personal finances.

Figure 7. Paratransit Passengers

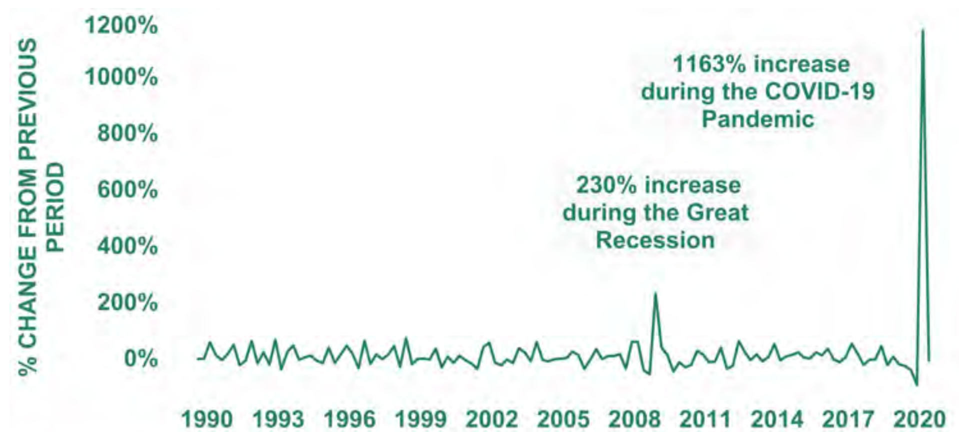
COTA Service Area
2019-2020, Monthly



SOURCE : Central Ohio Transit Authority (COTA)

Figure 8. Net Purchases of Used Autos

United States
1990-2020, Quarterly



SOURCE : Bureau of Economic Analysis

BIKE & PEDESTRIAN ACTIVITY

Central Ohio has long invested in infrastructure for people walking and bicycling, and, as of 2020, the region's metropolitan transportation planning area had over 700 miles of dedicated multi-use trails and on-street bike facilities connecting neighborhoods, parks, and employment centers. The Central Ohio Greenways (COG) trail network is the backbone of this system, offering extensive options for recreation or active transportation for residents throughout the region. However, the existing infrastructure is not enough to encourage biking and walking for all residents. Based on a recent study of the COG trail network in Franklin County, only about 14% of the County's population can walk to a trail access point within a half-mile of their home using a pedestrian network, and only about 27% can bike to a trail access point within one mile of their home using a low-stress bike facility, such as a multi-use path or a neighborhood street.[5]

The pandemic brought along increased interest in outdoor activities, illustrating the overlooked value of open space like parks and trails in the region's communities. While most destinations, activities, and services were closed, parks, trails, and neighborhood streets provided needed opportunities for recreation and safe, physically distanced socializing. Columbus and Franklin County Metro Parks saw a 33% increase in park visitors in 2020 compared to 2019, and in some months during the pandemic, the region's trails experienced a 70% increase in average daily trail use year over year (Figure 9). Some experts are suggesting that the surge in interest in outdoor recreation included new users of open space, and that this will spur lasting increases in park and trail use.[6]

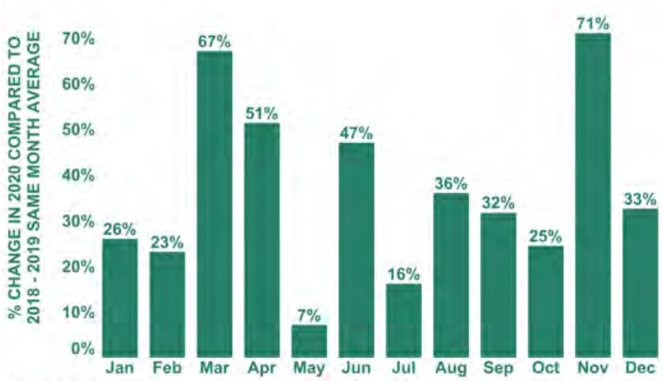
However, the benefits of increased opportunities to access community amenities like open space are not equally enjoyed. Lower income neighborhoods (particularly those with high concentrations of Black and brown residents) have experienced historic lack of investment in high-quality amenities like parks and trails. Only about 40% of neighborhoods in Franklin County experiencing disproportionately high rates of low-income populations are connected to a COG trail.
The safety of people walking and bicycling in Central Ohio was becoming an increasing priority for local policymakers even before the pandemic. In Franklin County, crash data illustrates the vulnerability of people walking and bicycling. While they are involved in only about 3% of all crashes, they represent 29% of traffic deaths, and 18% of traffic-related serious injuries (Figure 10). The City of Columbus, with support from local and regional partners, launched a Vision Zero initiative in 2020 as an important step toward increasing mobility equity through safety improvements.[7]

The pandemic brought about steep declines in vehicle traffic, which correlated with a reduced number of crashes involving people walking and bicycling in Franklin County. From May through December 2020, these crashes were down by about 30% compared with previous years. Overall declines in crashes involving people bicycling and walking points to traffic reduction, at least in some neighborhoods, as an important contributor to improved safety for the most vulnerable roadway users.

While overall crashes were down, the number of fatalities resulting from crashes involving people walking in Franklin County was higher (33 in 2020, compared with 24 in 2019). It is not entirely clear whether this tragic increase in lost lives is related to the pandemic or other factors. However, it is notable that half of these fatal incidents occurred in majority Black and brown neighborhoods (only 30% of Census Block Groups are home to more than 50% people of color). Structural racism contributes to this disproportionate effect—these tend to be neighborhoods with higher speed roads, poorer infrastructure, and more people reliant on transit, biking, and walking, a condition created by a history of wealth deprivation.

Figure 9. Change in Average Daily Trail Use

Central Ohio Trail System
2020 compared to 2018-19 average, Monthly

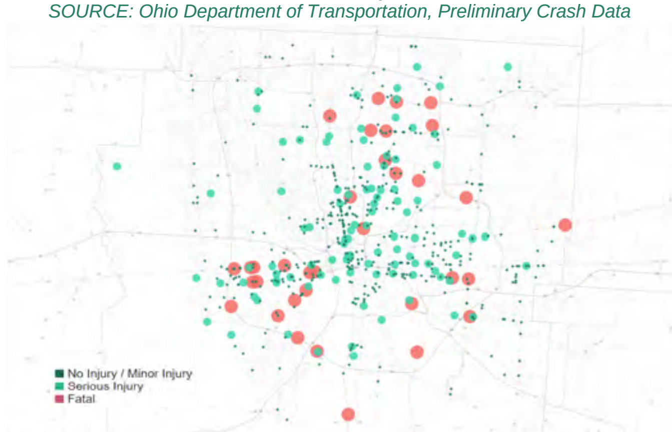


SOURCE : TrafX Trail Counters

Figure 10. Bike & Pedestrian Crash Locations

Franklin County, 2020

SOURCE: Ohio Department of Transportation, Preliminary Crash Data



FREIGHT & LAST-MILE LOGISTICS

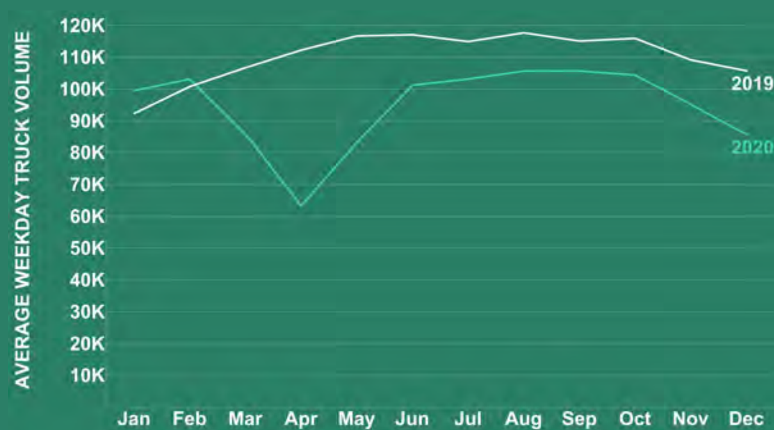
For decades, Central Ohio worked to establish a competitive advantage for economic development through investments in freight transportation and logistics, resulting in sustained growth of those industries, and positioning the region to capitalize on the growing e-commerce share of the retail market. Nationwide and regionally, freight transportation has been increasing since the Great Recession, driven by a combination of business supply chain delivery, and direct-to-consumer e-commerce.

Overall, freight traffic volumes were reduced by the pandemic. Supply chains were stalled as many international markets shut down their borders temporarily. Furthermore, production declined for some industries in response to abrupt shifts in consumer product demand. Even before widespread concern about COVID-19 became a reality in the U.S., freight activity (including trucks, rail, and air cargo) was slowing in response to international spread of the virus as early as December 2019. From November 2019 to April 2020 freight activity fell 12% (Figure 11). In Central Ohio, freight traffic volumes on the road network were down about 10% in 2020, compared with the same month in 2019 (Figure 12).

Figure 11. Freight Index (Truck, Rail, & Air)
United States
2000-2021, Monthly

SOURCE : U.S. Bureau of Transportation Statistics

Figure 12. Truck Traffic Volume
15-County Central Ohio Region
2019-2020, Monthly



SOURCE : Ohio Department of Transportation, 26 Permanent Count Stations

Supply chains eventually stabilized as markets re-opened for production and shipment, and while some industries remained stunted by demand reductions, others surged. E-commerce spending was quickly accelerated as many consumers opted to avoid shopping in brick and mortar stores—increasing 30% in a single quarter. This new source of demand helped to offset reduced freight activity, returning closer to pre-pandemic levels by the holidays.

One advantage for roadway freight was the reduction of passenger vehicle traffic volume in cities. City congestion creates bottlenecks for freight, and in Central Ohio, peak hour travel time uncertainty (a measure of the likelihood of travel delays during commute times) had been steadily increasing in the region as the population steadily grew. These delays increase direct-to-consumer transport of goods, or “last-mile logistics”, meaning increased costs for businesses shipping goods for production, and pressure added to the transportation network.

If the surge in consumer demand for e-commerce and other delivery services persists, then there will be a concurrent persistence in higher volumes of last-mile logistics trips within the local road network. As previously noted, continuing remote work has the potential to reduce commuting trips, but those reductions may be offset in-part by increased neighborhood delivery activity. These various increases in traffic on local roads may create new challenges around infrastructure, safety, parking, and mode equity.

This trend is putting new pressure on cities nationwide. Research by McKinsey and Company suggests that without intervention, e-commerce demand will increase delivery vehicles by 36%, increase emissions by 6 Million-tons of carbon dioxide, and increase average commute times 21%.[8] The acceleration of e-commerce will likely mean an acceleration of local policy interventions to offset the impacts on climate, congestion, and neighborhood traffic safety for all modes.

INTERCITY TRAVEL & TOURISM

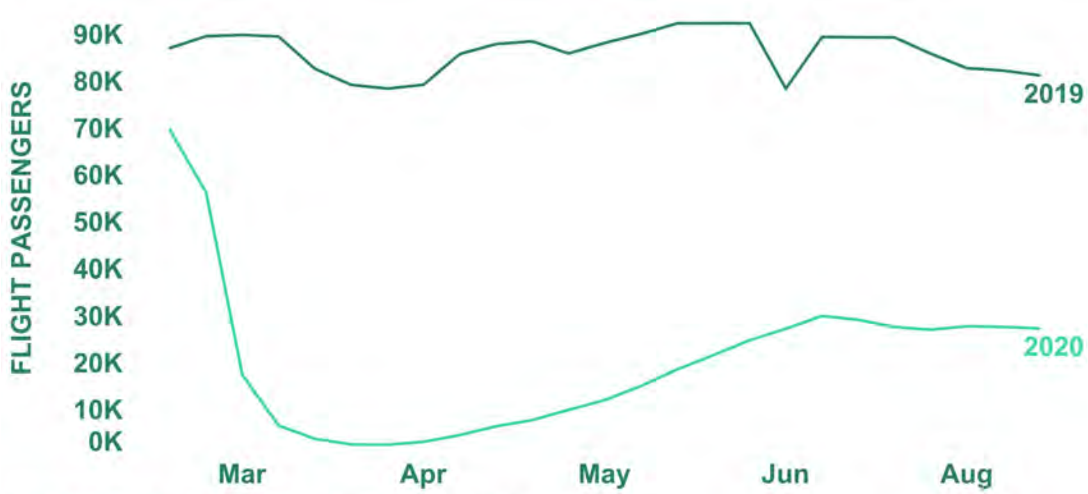
At the end of 2019, the Greater Columbus area had 42 million visitors, according to Experience Columbus, the city's tourism advocacy organization. Tourism is an important driver of the region's economy. Visitors spent $7 billion annually, supported 78,000 jobs in Franklin County, and paid $1.25 billion in taxes each year. Columbus was gaining attention as a destination city for domestic travelers, making headlines in major newspapers and travel magazines.[9]

Passenger air travel directly supports the tourism industry in Central Ohio, whether for business or leisure. Commercial passenger traffic in Columbus predominantly occurs at John Glenn International Airport (CMH), operated by the Columbus Regional Airport Authority (CRAA). 7.5 million passengers passed through CMH in 2017.[10] Based on interviews with CRAA staff, those passengers were evenly split between business and leisure.

With the onset of the pandemic, passenger travel disappeared almost entirely. In mid-April 2020, passenger travel hit its lowest point in Columbus falling from 10,000 passengers per day to fewer than 500 passengers per day. Early 2021 has seen some recovery, but trips are still only at one-third of the volume seen before the pandemic. In early 2021, most passenger travel was for leisure, as many companies were not yet authorizing business travel at 2019 levels.

While leisure travel is expected to experience a surge of pent up demand as the pandemic is managed through vaccinations and established health protocols, sustained shifts toward remote meetings will have continued negative impacts on local revenues from business traveler spending for the foreseeable future. Some types of business, such as large meetings and conventions, are more difficult to replicate virtually and will likely return once it is safe to do so. According to interviews with CRAA staff, business travel has a higher economic impact than leisure travel. Smaller meetings and travel for individuals, such as employees attending meetings at a corporate headquarters, are the types of travel most likely to see permanent reductions due to remote work options.

Figure 13. Air Travel Passengers
John Glenn International Airport
2019-2020, Weekly



SOURCE : Columbus Regional Airport Authority

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Funders

Columbus City Council
The Columbus Foundation
The Robert Wood Johnson Foundation

Appendix B
One Columbus Strategic Plan (2019)

ONE COLUMBUS

Partners for Regional Growth & Prosperity

THE COLUMBUS REGION

THE COLUMBUS REGION

The Columbus Region is a dynamic 11-county metropolitan area in the midst of unprecedented economic growth. The Region is home to today's leaders and is at the forefront of the industries of tomorrow, from advanced manufacturing to smart mobility research and development.

Delaware	Licking	Morrow
Fairfield	Logan	Pickaway
Franklin	Madison	Union
Knox	Marion	

OPEN

SMART

BUSINESS ORIENTED

ONE COLUMBUS

Partners for Regional Growth & Prosperity

The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world's most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation throughout the 11-county Columbus Region.

TABLE OF CONTENTS

THE BEGINNING

The Columbus 2020 Story Started With You

A REGIONAL REVIVAL

As summer turned to fall in 2007, Central Ohio was in the midst of a decade of stagnant job growth, diminishing per capita income figures and an undistinguished economic development profile. Columbus was considered just another metro area succumbing to the headwinds of the decline of the Midwest. In December of that year, the housing crisis and the global recession hit, washing away any gains that had been made in that decade.

Leaders around the country gathered to consider their economic future, including in Central Ohio. What would our future be and how would we claim it? How could we leverage the great companies that had been built here, the ambition of local entrepreneurs and the power of our world-renowned institutions?

A new path was created based on the dire need for economic activity and job growth, and became more important as each day passed. A new platform was needed to bring focus to these efforts to go to market as the Columbus Region, and to stake our claim as one of the most powerful metropolitan economies in the United States. Audacious, measurable goals were set to define the mission of the work, and the stakes were high.

The journey of the next decade included transformational project announcements, notable entrepreneurial achievements and the greatest expansion of the Columbus Region economy in its history. A decade later, the Columbus Region has

Regional Growth Strategy Launch

COLUMBUS 2020

50,000 Net New Jobs

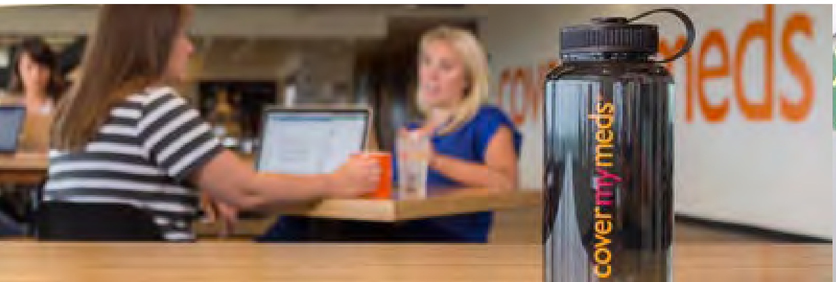
2010 — Columbus 2020 Incorporated

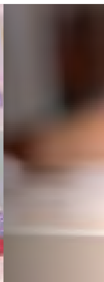
2011 — Columbus 2020 Begins Operations

2012 — IBM Opens Advanced Analytics Center

2013 — SK Food Group Announces $13 Million Food Manufacturing Facility

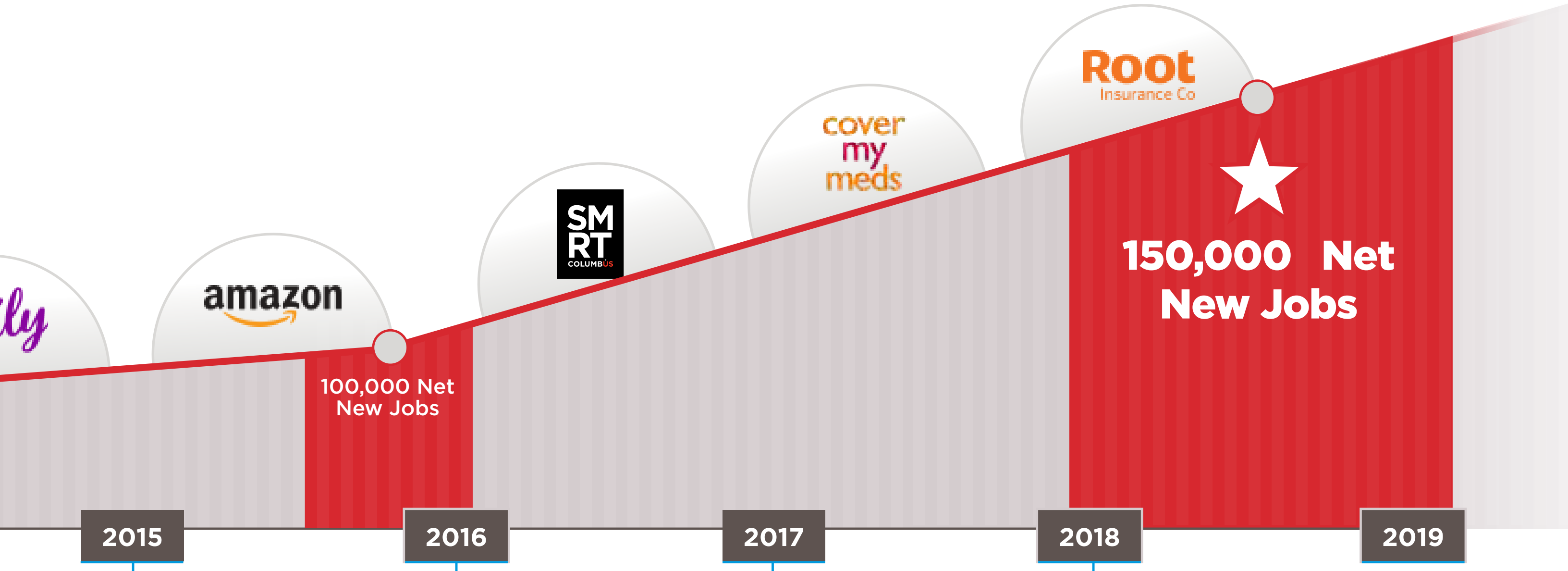
2014 — Zulily Announces Plans for New Fulfillment Center





not only achieved the job, investment and income goals it set, but has also earned distinction as a metro area with boundless ambition and economic potential.

For those reasons and more, we can and should celebrate, but we cannot pause. 2020 is a mile marker, not a destination. So, we redouble our efforts and attack the next 10 years with the same enthusiasm and ambition that fueled our work in 2010.



2015

Sofidel Chooses Circleville for New Manufacturing Facility

Amazon and Amazon Web Services Announce Multiple Projects Totaling $1.3 Billion in Capital Investment and 2,000 New Jobs

2016

Dollar Shave Club Announces Plans for Grove City Facility, 185 New Jobs

Columbus Wins $50 Million Smart Cities Challenge

2017

CoverMyMeds Sold for $1.1 Billion

Facebook to Build $750 Million Data Center in Licking County

2018

Root Insurance Valued at $1 Billion

Google Announces Plans for New Albany Data Center

Amazon to Add West Jefferson Fulfillment Center, 1,500 New Jobs

RESULTS

The Columbus Region has emerged as a beacon of economic competitiveness and population growth equal to any in the country. As this decade ends, the Columbus Region is surging beyond its goals, and is considered a national model of economic development success and collaboration. With each company expansion, each investment announcement from a new company and each company formed in the Region, our communities prosper and our lives are changed for the better.

In less than 10 years, the Columbus 2020 Regional Growth Strategy ...

created over
150,000
net new jobs

secured over
$8 billion
in capital investment

sparked a
30% **increase in personal per capita income**

No. of Projects:
500+

Total Payroll:
$2.0B

Capital Investment:
$8.5B

> **"Columbus is the #1 rising city for startups and the top emerging city for venture capital."**
>
> **FORBES**

> **"Columbus isn't the next business destination; it's already happening."**
>
> **INC.**

=$23.8 BILLION

economic impact

“The Columbus Region is experiencing the strongest decade of economic growth in its history, surging past what we once thought was possible. The broad-based growth we are seeing across the 11 counties and in core industries has lifted many businesses, communities and individuals.”

PABLO VEGAS,
Chairman of the Board of Directors, Columbus 2020

THE PROCESS

Your Input Defined the Path Forward

WE LISTENED

The past year has included hundreds of meetings, conversations and forums to discuss the future of our region. What are we anxious about? What is our new ambition? What does the future hold for this great region? Business leaders, public officials and civic advocates were engaged to discuss these concerns and what success looks like for the 11-county Columbus Region.

LEADERSHIP ASSESSMENT

Spring 2018

60
business leaders

From
45
organizations

Representing
22
industry sectors

STAKEHOLDER & CIVIC GROUP DISCUSSIONS

Summer 2018

We met with
200+
business & civic leaders and board members

Representing
50+
local economic development partners

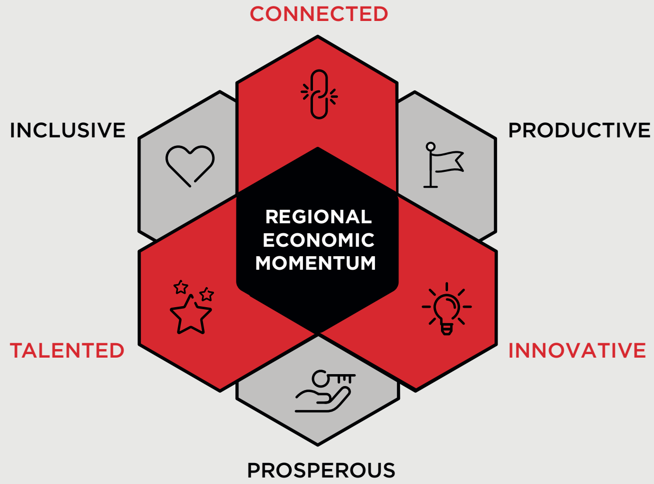
This research and the conversations it sparked have exposed common interests and priorities that have helped to identify our path forward.

ANALYSIS AND INSIGHTS

As in years past, the Columbus Region focused on the hard facts. Objective, comparative research revealed where we are strong, where we need to improve and where we are lagging behind. Analysis was conducted to address how prepared the Region is to meet the challenges of the future. Rapidly changing technology, global competition and demographic shifts are sure to have an impact on the Columbus Region, and the strategies and tactics that have worked in the past will not yield the same results going forward.

COMPARATIVE RESEARCH

As we build upon the successes achieved during the past decade, Avalanche Consulting, a national economic development consultancy, identified six areas critical to the economic vibrancy of a region — **connectivity, productivity, prosperity, innovation, talent** and **inclusivity.** While an economically vibrant region may not rate especially high in each and every measure, rare is the region that can succeed in the face of consistently poor performance across any one element. To succeed going forward, we must focus on these areas.



Consistent themes emerged from the stakeholder meetings and research. It became clear that in order to achieve a new ambition and meet both existing and emerging challenges, Columbus Region communities, leadership and institutions will need to focus on four imperatives to achieve success.

1 WE MUST

Sustain Our Economic Momentum

by continuing to make economic growth and prosperity a top priority.

2 WE MUST

Develop, Inspire and Attract a Talented, Adaptive and Diverse Workforce

to compete for investment.

3 WE MUST

Enable the Innovation Capacity

of business, academic and government sectors to grow dynamically.

4 WE MUST

Increase Global Identity and Connectivity

to attract investment and talent from around the world.

1 SUSTAIN OUR ECONOMIC MOMENTUM

by continuing to make economic growth and prosperity a top priority.

Success breeds confidence, and confidence fuels momentum — a necessary component to the next phase of the Region's growth. To compete for talented people and strategic investment, there must be a strong case that we are getting stronger, more innovative and more diverse.

The challenge: Over the last decade, the Region accomplished its economic development goals and outperformed other Midwest metros across many metrics. To continue this remarkable level of momentum, we must amplify our successes, apply resources and redouble our efforts.

The Region must consistently invest in and execute a comprehensive economic development strategy in order to compete and to be ready for opportunities that emerge.

#1 THROUGHOUT THE MIDWEST
Job Growth
U.S. Bureau of Labor Statistics

#1 THROUGHOUT THE MIDWEST
GDP/GRP
U.S. Bureau of Economic Analysis

#1 THROUGHOUT THE MIDWEST
Population Growth
U.S. Census Bureau

#1 THROUGHOUT THE MIDWEST
Millennial Migration
Brookings Institution

2 DEVELOP, INSPIRE AND ATTRACT A TALENTED, ADAPTIVE AND DIVERSE WORKFORCE

to compete for investment.

The Columbus Region is younger and more educated than the national average, leading Ohio and the Midwest in both population and millennial growth. We boast one of the highest concentrations of higher education institutions and an in-demand, tech savvy workforce.

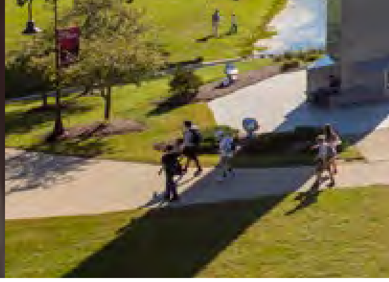
The challenge: There are stubborn disconnects between demographics and outcomes, and we must work to eliminate these disparities. There is an insatiable appetite for skilled workers, and we must meet the challenges presented by automation. It will be necessary to become far more diverse, engaging across rural and urban areas and minority communities, while also attracting talent from across the world.

A talented workforce is the most critical location factor for our existing companies and for those who seek to locate here.

#1 city for college graduates
SmartAsset

35.9% of the population 25+ holds a bachelor's degree or higher

#12 in the United States and #1 in the Midwest for net migration of ages 25-34



3 ENABLE THE INNOVATION CAPACITY

of business, academic and government sectors to grow dynamically.

The Columbus Region is home to 15 Fortune 1000 companies, billion-dollar startups, and a strong education ecosystem. Corporate, academic, government, medical centers and R&D operations in our region are at the forefront of research and innovation. Research expenditures at The Ohio State University totaled more than $850 million in 2017, ranking it among the top 25 universities in the United States.

The challenge: As technology advances and automation increases, threats to the existing ecosystem have emerged. Fortune 1000 companies in the Region must adapt as innovative competitors become a threat. The higher education system is being challenged to not only deliver a talented workforce, but also comprehensive research. Government entities are undergoing a massive shift in technologies to serve citizens and to achieve status as smart cities.

> To grow dynamically and to diversify our economy, we must create, use and leverage technology.

#1 city for tech workers
SmartAsset

Home to the Transportation Research Center, the largest independent proving grounds in the Americas

$484.68 million of venture capital invested in Columbus in 2018 across 61 companies

4 INCREASE GLOBAL IDENTITY AND CONNECTIVITY

to attract investment and talent from around the world.

The Columbus Region has worked hard to establish its identity and increase brand awareness, regionally, nationally and internationally. This has helped to attract both investment and talent, including hundreds of foreign-owned firms. Opportunities abound for companies to accelerate export and foreign direct investment (FDI) growth.

The challenge: It's critical that we connect our communities and companies to both each other and the rest of the world via infrastructure, including broadband.

While we connect the Columbus Region economy with others, we must also grow and elevate our brand. Expanding our reach to be globally known will help ensure continued economic growth.

The Columbus Region must be connected physically, digitally and intellectually with the rest of the world.

300+ foreign-owned organizations, including 115 Japanese businesses

Home to Rickenbacker International Airport, one of the world's only cargo-dedicated airports

Columbus has been recognized as the standard-bearer for collaborative visual identity

THE VISION

We Will Boldly Pursue a Shared Ambition

To be the **most prosperous region in the United States**

We emerged from the last decade in a new, better place, but those changes did not happen in a vacuum. The world changed around us, and the economic development landscape is far different and far more competitive than 10 years ago.

Building on the success of the past decade requires something more than an economic development plan. This will be a community-wide effort requiring a shared vision for a Columbus Region economy that enables prosperity for all. It will test our courage to change our approach even as we near the end of a decade of unprecedented economic growth.

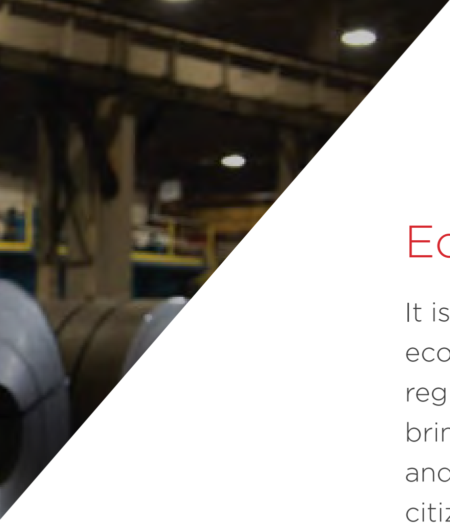
PROSPERITY DEFINED:

The process by which more and more people in a region improve their economic and social well-being.


Reginald
GROWTH

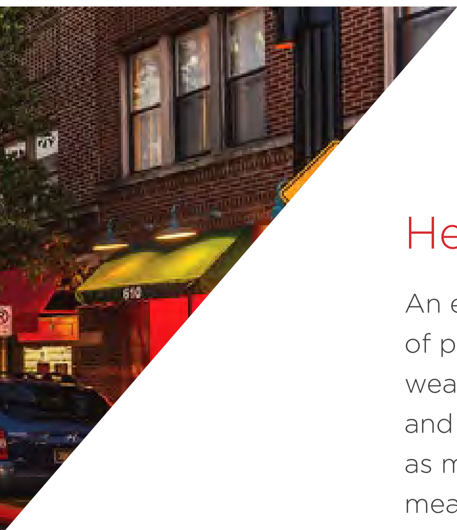

Three Dog Bakery
PROSPERITY


BATTELLE
INNOVATION



Economic and infrastructure gains:

It is imperative that the Columbus Region continue to grow and diversify its economy. There are a variety of measures that include net new jobs, gross regional product and relative gains in the tax base. Economic base growth that brings new money into the Region is the primary driver of our ability to innovate and to build the needed civic infrastructure to improve the quality of life of our citizens and to build social safeguards for those with short- and long-term needs.



Health, wealth and education gains:

An expanding economy is a necessary prerequisite to increase the well-being of people and the health of our communities. However, if disparities in income, wealth, education and health are to improve, our region must take action above and beyond what we've traditionally done. Indicators include measures such as median wages, racial employment and labor participation, and community measures of housing opportunity, educational attainment, healthcare disparities, and the physical and economic mobility of the workforce.

Tech, innovation and investment gains:

The economy is driven by technology. The Columbus Region must leverage its unique position as a leading center of higher education, corporate investment and government operations to expand its economy and reduce both costs and disparities. Measures of government, business and academic innovation such as venture capital invested in our region, patent development, STEAM education and other indicators signal our capacity to meet the challenges of a disruptive economy.

OUR MISSION

A Singular Focus on Jobs and Economic Development

The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world's most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation throughout the 11-county Columbus Region.

As we work together to realize our new vision, the One Columbus team is focused on providing the leadership and strategy needed to sustain and grow a vibrant region. Success over the next 10 years will be defined by accomplishing the following goals:

60k
jobs

We will secure 60,000 jobs in the Columbus Region. Full-time jobs with benefits remain a powerful way to change lives and build sustainable communities.

$3.3 billion
payroll

We will add $3.3 billion of payroll in communities within the Columbus Region.

$10 billion
investment

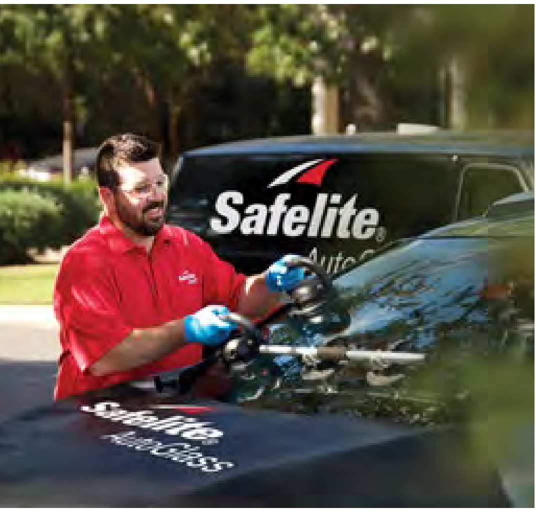
We will attract $10 billion of capital investment to the Columbus Region from our economic base projects.

THE PLAN

FOUNDATIONAL STRATEGIES

The fundamental principles for growing the Region's economy are consistent: Retain, attract and create jobs that drive economic growth.

Serve Existing Businesses



Objective

To create the most competitive economic base in the United States

Attract New Businesses

Objective

To create the most diverse employment and tax base in the United States

Support Entrepreneurship And Accelerate High-Growth Firms

Objective

To create a seamless continuum of services for venture-backed startups and high-growth firms to scale within the Columbus Region

GROWTH ACCELERATORS

To amplify and accelerate our growth, we must look outside the Region and beyond the horizon.

Prepare Communities For The Future

Objective

To become the most prepared area in the United States for growth and investment

Increase Global Trade And Investment

Objective

To lead our peer regions in foreign investment and export growth

Market And Promote The Columbus Region Globally

Objective

To become known as the most prosperous economy in the United States

ECONOMIC SECTORS

OBJECTIVE

To increase employment and overall payroll in each economic sector over the next decade, we will focus on these key industries.

Retail Brands & Technologies

Objective

To maintain our role as a retail headquarters, services and technology leader

E-Commerce

Objective

To increase our position as a leading logistics location by building global capabilities and diversifying our employment and facilities profile

Finance & Insurance

Objective

To increase our aggregate wages and diversify our finance and insurance industries

HQ & BUSINESS SERVICES

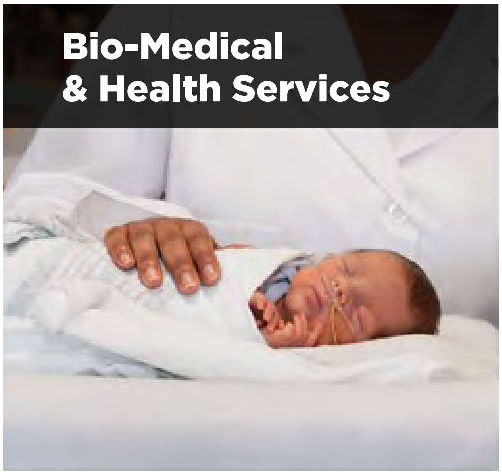
LOGISTICS

Automotive & Mobility

Objective

To diversify our portfolio of automotive and mobility suppliers and increase research and development services

Bio-Medical & Health Services



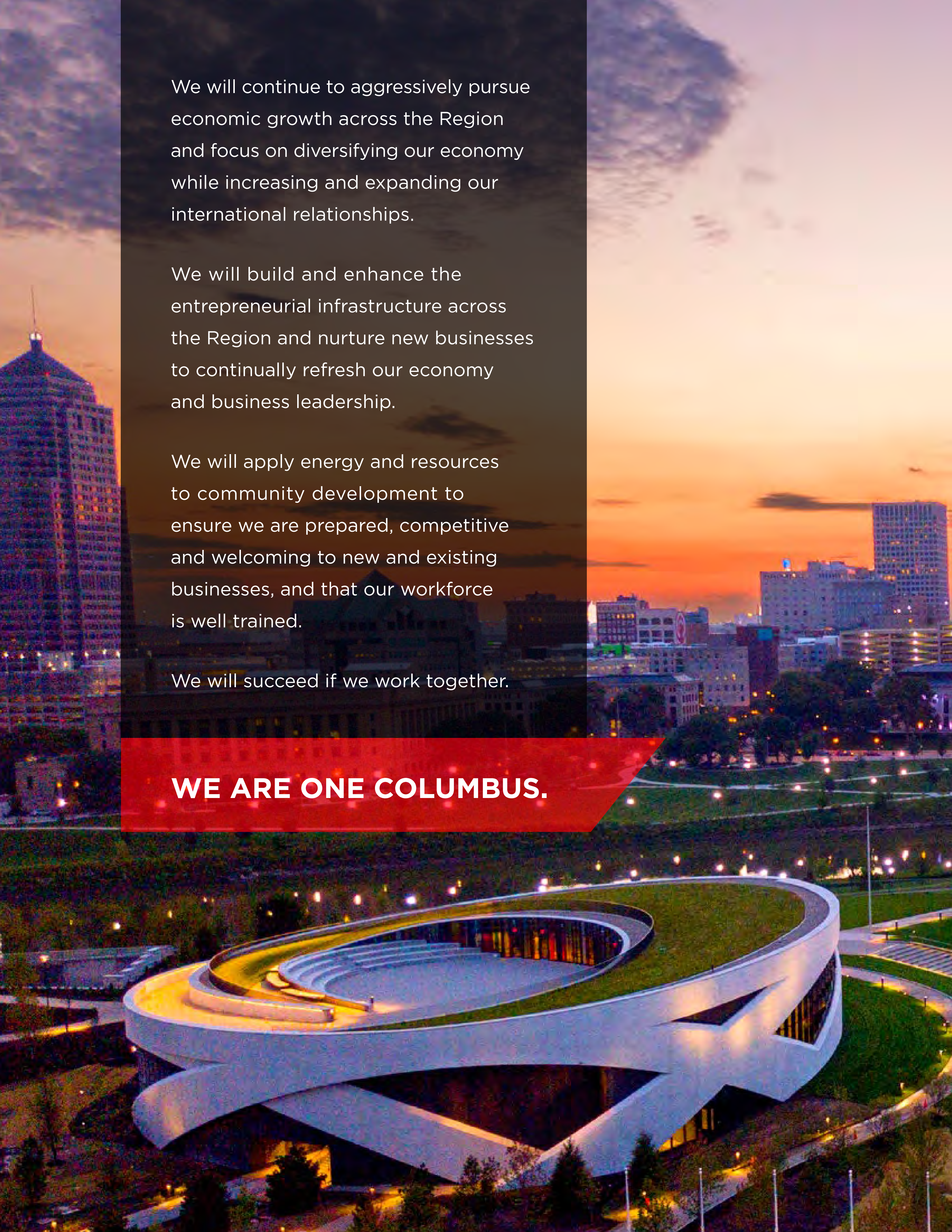
Objective

To build a sustainable bio-medical and health services industry

Advanced Computing Services

Objective

To become one of the most significant advanced computing centers in the United States



We will continue to aggressively pursue economic growth across the Region and focus on diversifying our economy while increasing and expanding our international relationships.

We will build and enhance the entrepreneurial infrastructure across the Region and nurture new businesses to continually refresh our economy and business leadership.

We will apply energy and resources to community development to ensure we are prepared, competitive and welcoming to new and existing businesses, and that our workforce is well trained.

We will succeed if we work together.

WE ARE ONE COLUMBUS.

THANK YOU

TO OUR PARTNERS, LEADERS AND INVESTORS

Board of Directors

Pablo A. Vegas, *Columbia Gas Group*

Eric Phillips, *Union County Economic Development Partnership*

Gregory R. Overmyer, *Overmyer Hall Associates*

Mark Berven, *Nationwide*

Marilyn Brown, *Franklin County Board of Commissioners*

Corrine Burger, *JPMorgan Chase & Co.*

Alex R. Fischer, *The Columbus Partnership*

Andrew J. Ginther, *Mayor, City of Columbus*

Michael W. Louge, *OhioHealth*

Robert H. Schottenstein, *M/I Homes*

Tom Shoupe, *Honda of America, Mfg., Inc.*

Aaron Pitts, *JobsOhio*

Mark Smolik, *DHL Supply Chain*

Raja Sundararajan, *AEP Ohio*

Dr. David Williams, Ph.D., Sc.D., *The Ohio State University*

Sue Zazon, *Huntington National Bank*

Matthew Bailey, *Squire Patton Boggs*

Kenny McDonald, CEcD, *One Columbus*

Sean Grant, *One Columbus*

State & Regional Partners

Columbus Chamber
JobsOhio
Mid-Ohio Regional Planning Commission
Ohio Development Services Agency
Rev1 Ventures
Smart Columbus
The Columbus Partnership

Local Partners

Area Development Foundation of Knox County
City of Canal Winchester
City of Columbus
City of Delaware
City of Dublin
City of Gahanna
City of Grandview Heights
City of Grove City
City of Groveport
City of Hilliard
City of London
City of New Albany
City of Pataskala
City of Pickerington
City of Upper Arlington
City of Westerville
City of Whitehall
City of Worthington
Delaware County
Fairfield 33 Development Alliance
Franklin County
Licking County Chamber/Grow Licking County CIC
Logan County Chamber of Commerce
Madison County Future Inc.
Marion CAN DO!
Mid-Ohio Development Exchange (MODE)
Morrow County
Pickaway Progress Partnership
Union County-Marysville Economic Development
Village of Obetz
Violet Township

Leadership Circle

Alliance Data Systems, Inc.
American Electric Power Company, Inc.
AT&T Ohio
Bank of America, National Association
Battelle Memorial Institute
Big Lots, Inc.
Bricker & Eckler LLP
Cardinal Health, Inc.
CBRE
Champion Companies
Chemical Abstracts Service
Columbia Gas of Ohio, Inc.
Columbus REALTORS
Columbus Regional Airport Authority
Columbus State Community College
Continental Office
Corna Kokosing Construction Company
CoverMyMeds LLC
Dawson Resources
Deloitte
Diamond Hill Capital Management, Inc.
Dispatch Media Group
Dispatch Printing Company
Encova Insurance
Ernst & Young
Fahlgren Mortine
Fifth Third Bank
Grange Insurance Company
Greif
Hollywood Casino Columbus
Honda Marysville
Honda of America Manufacturing, Inc.
Huntington Bank
Ice Miller, LLP
IGS Energy
JPMorgan Chase Bank
Lancaster Colony Corporation
L Brands, Inc.
M/I Homes, Inc.
Mount Carmel Health System

Leadership Circle (cont.)

Nationwide Children's Hospital
Nationwide Mutual Insurance Company
OhioHealth
PNC Bank
Porter Wright Morris & Arthur LLP
Ruscilli Construction Co., Inc.
SOLUTIONS Staffing
Squire Patton Boggs (US) LLP
The Scotts Miracle-Gro Company LLC
The Columbus Foundation
The Ohio State University
The Ohio State University Wexner Medical Center
Turner Construction Company
US Bank
VERTIV
Vorys, Sater, Seymour and Pease LLP
Worthington Industries, Inc.

Investors

3 Pillar Homes, LLC
Abercrombie & Fitch Co.
Accenture plc
AC Hotel Dublin
Adena Corporation
Advanced Civil Design, Inc.
Advanced Drainage Systems, Inc.
AECOM
Alterra Real Estate Advisors
American Structurepoint Inc.
Anderson Aluminum Corporation
Anderson Concrete Corporation
Anheuser-Busch InBev
Anthem, Inc.
Artina Promotional Products
Ascena Retail Group
Associated Insurance Agencies, Inc.
Assurex Global Corp.
Atlas Butler
Bailey Cavalieri LLC
BakerHostetler LLP
Barnes & Thornburg LLP
BDO USA LLP
BMO Harris Bank
Brexton LLC
Buckeye Power, Inc.
Bruner Corporation
Builders Exchange of Central Ohio
Building Industry Association of Central Ohio
Burgess & Niple, Inc.
Burns McDonnell
Byers, Minton & Associates, LLC
Calfee, Halter & Griswold LLP
Cameron Mitchell Restaurants
Capital University
Carlile Patchen & Murphy LLP
Casto
Central Ohio Technical College
Centric Consulting
Champion City Media
Chemcote Roofing Company
Chemcote, Inc.
Clark, Schaefer, Hackett & Co.
Clear Channel
ClearPath Benefit Advisors LLC
Coldwell Banker King Thompson
Colliers International
Columbus Airport Marriott
Columbus Business First
Columbus Building Trades Council
Columbus Coach, Ltd.
Columbus Coal & Lime Company
Columbus College of Art & Design
Columbus Zoo & Aquarium
Compass Homes, Inc.
Construction One
Crabbe, Brown & James LLP
Crane Group Co.
Crawford Hoying
CTL Engineering, Inc.
Cushman & Wakefield
Danis Building Construction Company
Dave Gill Chevrolet
Dayton Power & Light
Delaware Area Chamber of Commerce
Denier Electric Co., Inc.
Denison University
DesignGroup
DHL Express (USA), Inc.
Dickinson Wright PLLC
DLZ Corporation
Donatos Pizzeria, LLC
DRK and Company
Dublin Building Systems
Dugan & Meyers
Dupler Office
EclipseCorp, LLC
EDGE
Elford, Inc.
EMH&T
Express Employment Professionals
EXXCEL Project Management, LLC
Ferguson Construction Company
First Commonwealth Bank
First Financial Bank
First Merchants Bank
FirstEnergy Corp.
Franklin University
Frost Brown Todd LLC
FST Logistics
G & J Pepsi-Cola Bottlers, Inc.
GBQ Partners LLC
George J. Igel & Co., Inc.
Geotechnical Consultants Inc.
Germain Motor Company
Gilbane Building Company
Hahn Loeser & Parks LLP
Hamilton Capital Management, Inc.
Hamilton Parker Company, LLC
Haughn & Associates
Heartland Bank
Heath-Newark-Licking County Port Authority
Heidelberg Distributing Company
Hilton Columbus Downtown
Hoffmann & Associates Insurance Services, Inc.
Holbrook & Manter
Homewood Homes, Inc.
Humble Construction Co.
Hyatt Regency
Indus Hotels
Information Control Company LLC
InnoSource, Inc.
Interior Supply Inc.
JDS Companies
Jeni's Splendid Ice Cream
Jezerinac, Geers & Associates, Inc.
Jim Frey Real Estate Advisor
John Gerlach & Company
Jones Lang LaSalle Incorporated
Kabil Associates, Inc.
Kaufman Development
Kegler, Brown, Hill & Ritter Co., L.P.A.
KEMBA Financial Credit Union, Inc.
Kenyon College
KeyBank
Kimball Midwest
Kirk Williams Company
KLH Engineers
Kohr Royer Griffith, Inc.
Kohrman Jackson & Krantz
KPMG LLP
LeadingEDJE
Leftchannel
Lehman Daman Construction Services, Inc.
Lifestyle Communities
Limbach
Lindsay Honda/Acura
LIVE! Technologies
Loeb Electric and Loeb Lighting Services
LOTH, Inc.
M&A Architects
Matrix PDM Engineering, Inc.
McGohan Brabender LLC
Mead & Hunt
Medical Mutual of Ohio
Mid-City Electric
Miles McClellan Construction Company
Mills James
Mindstream Interactive
Montrose Group
Morgan Stanley & Co. LLC
ms consultants
NAI Ohio Equity
Navigator Management Partners, LLC
NBBJ, LLC
NCT Ventures
Norfolk Southern Corporation
ODW Logistics, Inc.
Ohio Dominican University
Ohio University
Ohio Wesleyan University
Oswald Companies
Otterbein University
Overmyer Hall Associates
Park National Bank
Paul J. Ford & Company
PEDCO E&A Services
Peoples Bank
Perez & Morris LLC
Pillar Technology Group, LLC
Plante Moran
POLARIS Centers of Commerce
Portfolio Creative
Power Connect
Prater Engineering Associates, Inc.
Preferred Living
ProLogis
Pulte Group, Inc.
RED Capital Markets, LLC
Redwood Acquisitions
Renaissance Columbus Downtown
Resource Development Group
RevLocal, Inc.
Robin Enterprises Company
Rockford Homes
Roetzel & Andress, LPA
Ryan's Landscaping
Rumpke
S&ME
Safelite Group, Inc.
Sands Decker CPS, LLC.
Schneider Downs & Co., Inc.
Shumaker, Loop & Kendrick, LLP
Sinclair Broadcast Group
Solid Waste Authority of Central Ohio
Solutions Staffing
Sophisticated Systems, Inc.
Spectrum
State Auto Insurance Companies
State Farm Insurance Company
Steiner & Associates
Stewart Title Company
Stonehenge Partners, Inc.
Suburban Steel Supply Company LLC
Superior Beverage Group
Taft Stettinius & Hollister, LLP
Tanaka & Company
Team Fishel Surveying and Engineering
Telhio Credit Union
Terracon
The Daimler Group, Inc.
The Energy Cooperative
The Kleingers Group, Inc.
The Kroger Co.
The Memorial Tournament
The New Albany Company
The Painting Company
The Pizzuti Companies
The Refectory Restaurant & Bistro
The Robert Weiler Company
The Superior Group
The Whiting-Turner Contracting Company
thinkCSC
Thomas & Marker Construction
Trillium Staffing
Valley Interior Systems
VanTrust Real Estate LLC
Vermont Energy Investment Corporation
Vertiv Corporation
Village Communities
Vista Industrial Packaging
Voya
Wagenbrenner Development
Wells Fargo Bank
Whiting-Turner Contracting
Wolfe Enterprises
Woolpert
Zipline Logistics

As of August 2019

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