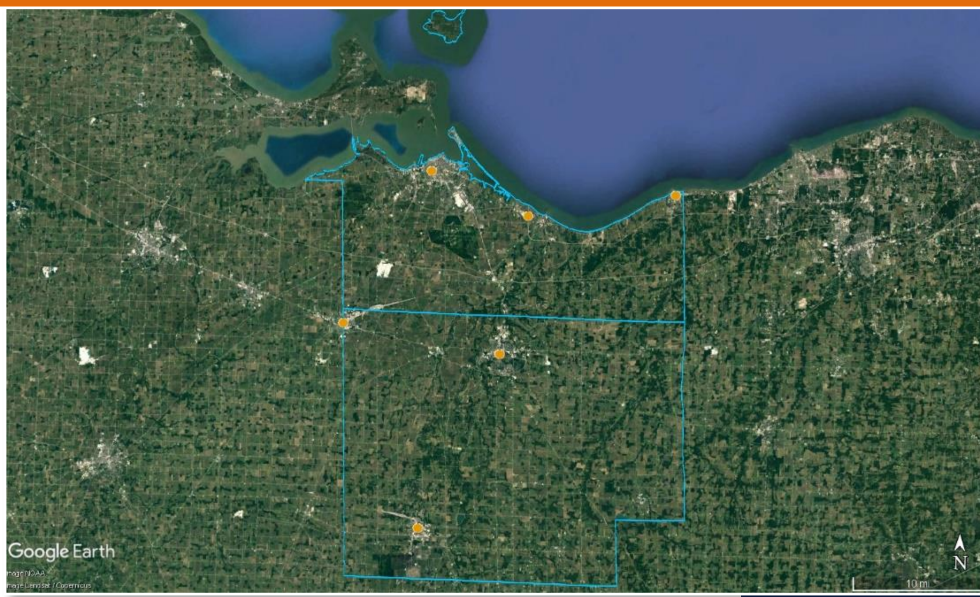
Comprehensive Economic Development Strategy
Erie and Huron Counties, Ohio (2025 – 2029)



Prepared for:

Prepared by:

HAMMAN CONSULTING GROUP
SITE SELECTION – ECONOMIC DEVELOPMENT

October 2024

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INTRODUCTION

The Erie Regional Planning Commission (the "Client" or "ERPC") engaged The Hamman Consulting Group, Inc. ("HCG") to prepare a Comprehensive Economic Development Strategy (the "CEDS") for Erie and Huron counties (collectively referred to herein as the "Counties" or the "Region") per the guidelines set forth by the U.S. Economic Development Administration ("EDA").

The CEDS includes the following sections:

- Summary Background
- SWOT Analysis
- Industry Cluster Analysis
- Strategic Direction/Action Plan
- Evaluation Framework
- Economic Resilience
- Workforce Development

HCG has truly appreciated the opportunity to work with the ERPC and looks forward to the potential for continued engagement should there be opportunities for additional support and guidance to help advance economic development efforts in Erie and/or Huron Counties. Please feel free to contact me at (440)292-5326 or via email at jason@hammanconsulting.com to discuss any questions related to the CEDS.

Respectfully,

Jason Hamman, President
The Hamman Consulting Group, Inc.
11400 W. Lake Rd.
Vermilion, OH 44089

STEERING COMMITTEE

The CEDS Steering Committee included the following individuals:

- Tim King -- Executive Director, Erie Regional Planning Commission
- Matt Lasko – City Manager, City of Huron
- Joe Roman - Executive Director, Erie County Chamber of Commerce
- Zach Rospert - Financial Planner/Econ. Dev. Specialist, Erie Regional Planning Commission
- Sarah Ross - Executive Director, Huron County Growth Partnership
- Nico Samaniego – Director of Economic Development, Greater Sandusky Partnership
- Eric Wobser – Executive Director, Greater Sandusky Partnership

The CEDS Planning Process

A CEDS is designed to focus, strategize, and aid implementation of economic development policies and practices at the local and regional level. Regional economies consist of numerous moving parts, which can be difficult to coordinate and organize. The CEDS document creates an action plan to unite local governments, organizations, businesses, and residents to develop and diversify the economy, improve the quality of life, efficiently utilize resources, and protect the environment.

This CEDS includes analyses of economic and demographic data, as well as industry composition and trends. Utilizing a SWOT analysis framework, the CEDS will feature a series of goals, objectives and strategies, and an evaluation framework with metrics.

Stakeholder Interviews & Public Survey

Twenty-three interviews were conducted with twenty-six key stakeholders in order to better understand local perceptions regarding the strengths and weaknesses of the Region.

Name	Title	Organization
Mike Gastier	Educator, Agriculture and Natural Resources	Ohio State University Extension
Trudy Riddle	Business Outreach Coordinator	Ohio Means Jobs
Neil Yingling	CWFI Administrator	Ohio Means Jobs
John Orzech	City Manager	City of Sandusky
Bryson Hamons	City Manager	City of Willard
Pat Shenigo	Commissioner	Erie County
Connie Ward	Mayor	Village of Berlin Heights
Kate Repola	Executive Director	Vermilion Main Street
Kula Lynch Hoty	Corporate Counsel	Hoty Enterprises, Inc.
Daniel Rambler	Superintendent	Sandusky City Schools
Jason McClure	SVP, Park Operations	Cedar Fair Entertainment Co.
Erika Roitblat-Bowers	Project Manager, Programs & Site Selection	Team NEO
Angie Byington	Community Development Director	Perkins Township
Skip Wilde	Commissioner	Huron County
Larry Fletcher	President & CEO	Shores & Islands Ohio
Amanda Smith Rasnick	Destination Development & Experience Director	Shores & Islands Ohio
Arne Goldman	Director of Business Development	Marous Brothers Construction
Nick Katsaros	Regional External Affairs	Ohio Edison
Melissa (Frank) Rowe	Sr. Economic Development Executive	Ohio Edison
Mike Parker	President	Erie County Township Association
Bo Knez	Owner	B.R. Knez Construction
Lenora Minor	Director	Huron County - Jobs & Family Services
Mike Petrigan	First VP, Advisory & Transaction Services	CBRE
Beth Maiden	Executive Director	Erie County Community Foundation
Ron Guerra	President	LEWCO, Inc.
Josie Barga	Senior Project Manager	Jobs Ohio

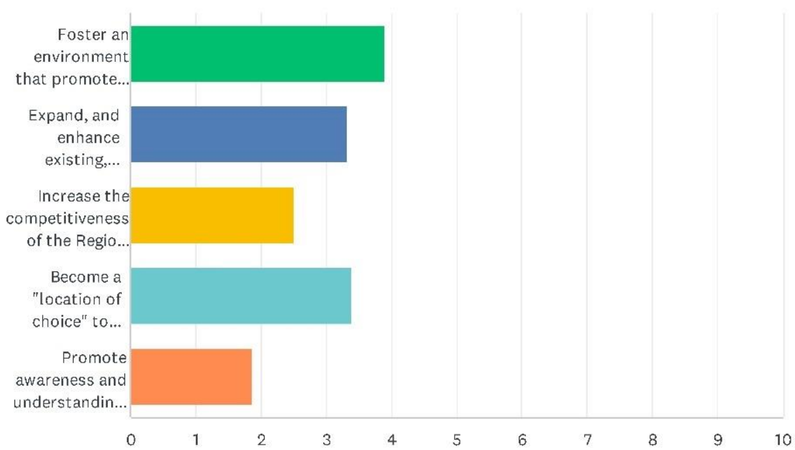
PUBLIC SURVEY

The following survey was open for public response on SurveyMonkey.com beginning Monday, June 17 through Friday, July 5. Members of the CEDS Steering Committee posted links to the survey on their respective websites and social media pages. The Sandusky Register also published an article on June 27 that included a link to the survey. The results are provided below.

Comprehensive Economic Development Strategy for Erie & Huron Counties

Q1 Please rank the following goals, from most (1) to least (5) important, in terms of improving economic development outcomes in Erie & Huron Counties:

Answered: 127 Skipped: 0

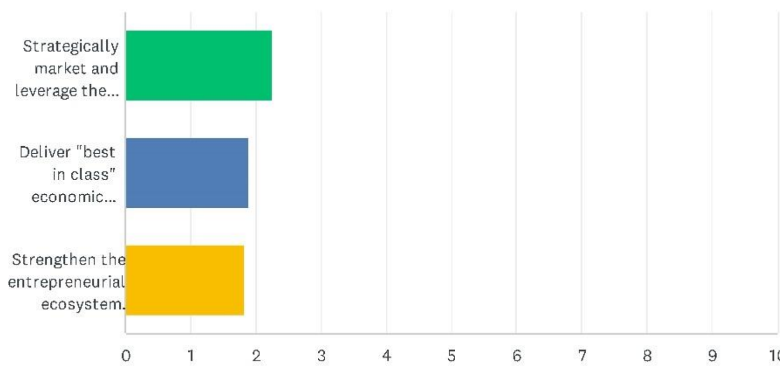


	1	2	3	4	5	TOTAL	SCORE
Foster an environment that promotes the retention, expansion and attraction of business investment.	40.16% 51	24.41% 31	24.41% 31	7.09% 9	3.94% 5	127	3.90
Expand, and enhance existing, public infrastructure.	20.47% 26	26.77% 34	23.62% 30	23.62% 30	5.51% 7	127	3.33
Increase the competitiveness of the Region's workforce.	4.72% 6	19.69% 25	18.11% 23	37.80% 48	19.69% 25	127	2.52
Become a "location of choice" to live, work and play.	26.77% 34	23.62% 30	22.83% 29	14.96% 19	11.81% 15	127	3.39
Promote awareness and understanding of economic development.	7.87% 10	5.51% 7	11.02% 14	16.54% 21	59.06% 75	127	1.87

Survey respondents ranked "Foster an environment that promotes the retention, expansion and attraction of business investment" as the most important economic development goal among the five choices.

Q2 Please rank the following objectives, from most (1) to least (3) important, towards achieving the following goal: Foster an environment that promotes the retention, expansion and attraction of business investment.

Answered: 95 Skipped: 32

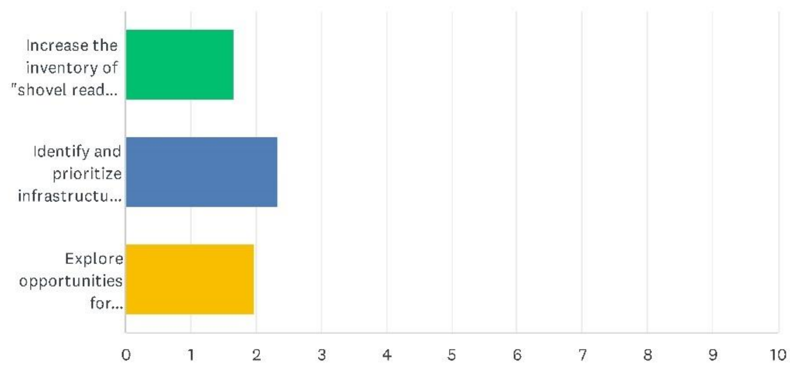


	1	2	3	TOTAL	SCORE
Strategically market and leverage the Region's unique economic development assets.	38.95% 37	49.47% 47	11.58% 11	95	2.27
Deliver "best in class" economic development programs and services.	32.63% 31	24.21% 23	43.16% 41	95	1.89
Strengthen the entrepreneurial ecosystem.	28.42% 27	26.32% 25	45.26% 43	95	1.83

"Strategically market and leverage the Region's unique economic development assets" was ranked as the most important objective towards achieving the goal of "Foster an environment that promotes the retention, expansion and attraction of business investment."

Q3 Please rank the following objectives, from most (1) to least (3) important, towards achieving the following goal: Expand, and enhance, public infrastructure.

Answered: 110 Skipped: 17



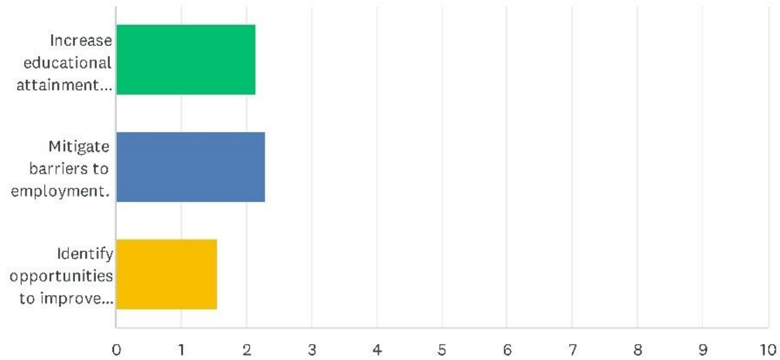
	1	2	3	TOTAL	SCORE
Increase the inventory of "shovel ready" site for economic development project opportunities.	16.36% 18	33.64% 37	50.00% 55	110	1.66
Identify and prioritize infrastructure needs in "development corridors."	51.82% 57	30.91% 34	17.27% 19	110	2.35
Explore opportunities for collaboration.	31.82% 35	35.45% 39	32.73% 36	110	1.99

"Identify and prioritize infrastructure needs in 'development corridors'" was selected by nearly 52% of respondents as the most important objective towards the goal of "Expand, and enhance, public infrastructure."

The Region has been working on this objective, with the U.S. 6 Corridor Study issued by ERPC in November 2019.

Q4 Please rank the following objectives from most (1) to least (3) important, towards achieving the following goal: Increase the competitiveness of the Region's workforce.

Answered: 98 Skipped: 29

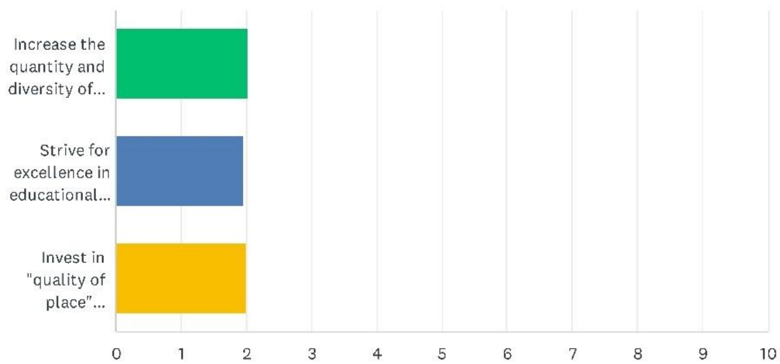


	1	2	3	TOTAL	SCORE
Increase educational attainment levels.	38.78% 38	37.76% 37	23.47% 23	98	2.15
Mitigate barriers to employment.	48.98% 48	31.63% 31	19.39% 19	98	2.30
Identify opportunities to improve engagement with seasonal and international workforce.	12.24% 12	30.61% 30	57.14% 56	98	1.55

"Mitigate barriers to employment" was ranked as the most important objective towards achieving the goal of "Increase the competitiveness of the Region's workforce." The Region has proactively taken measures to reduce employment barriers through recent efforts to analyze issues such as the availability of childcare services and housing.

Q5 Please rank the following objectives, from most (1) to least (3) important, towards achieving the following goal: Become a "location of choice" to live, work and play.

Answered: 104 Skipped: 23

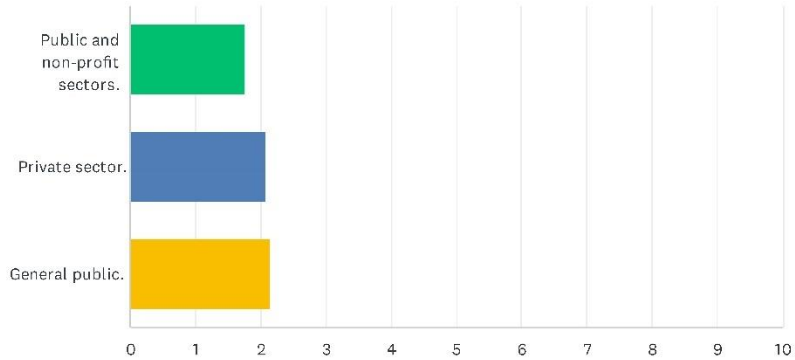


	1	2	3	TOTAL	SCORE
Increase the quantity and diversity of housing options.	37.50% 39	27.88% 29	34.62% 36	104	2.03
Strive for excellence in educational institutions.	37.50% 39	21.15% 22	41.35% 43	104	1.96
Invest in "quality of place" amenitites.	25.00% 26	50.96% 53	24.04% 25	104	2.01

Responses were split almost evenly between the three objectives towards achieving the goal of the Region becoming "a 'location of choice' to live, work and play."

Q6 Please rank the following objectives, from most (1) to least (3) important, towards achieving the following goal: Promote awareness and understanding of economic development to stakeholder groups.

Answered: 105 Skipped: 22

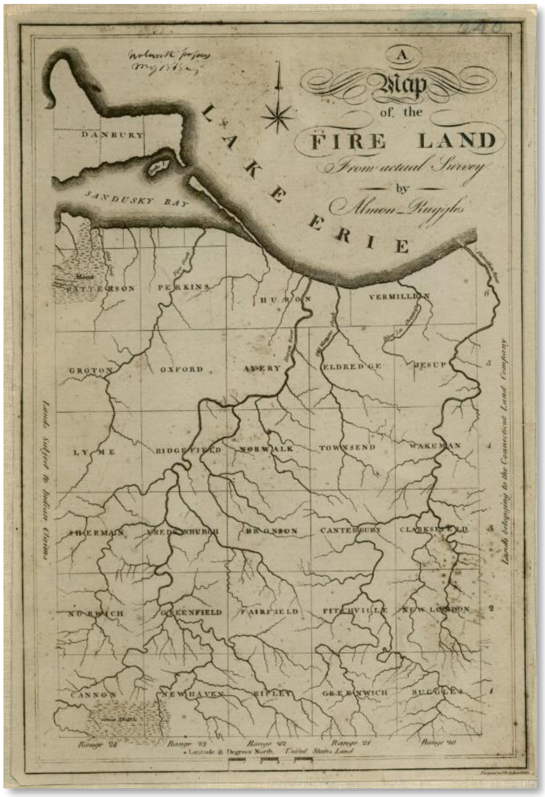


	1	2	3	TOTAL	SCORE
Public and non-profit sectors.	18.10% 19	40.00% 42	41.90% 44	105	1.76
Private sector.	44.76% 47	19.05% 20	36.19% 38	105	2.09
General public.	37.14% 39	40.95% 43	21.90% 23	105	2.15

Promoting "awareness and understanding of economic development" to the general public was ranked by respondents as the most important stakeholder group, followed closely by the private sector.

Summary Background

Historical & Geographical Overview



Originally part of Connecticut's "Western Reserve," Erie and Huron Counties became known as the "Fire Lands," as this land was given to residents whose property was destroyed by the British military during the Revolutionary War.

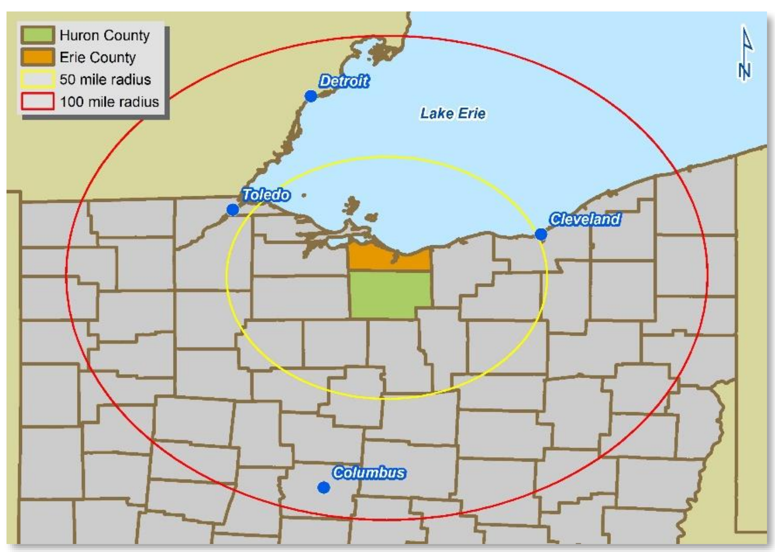
Huron County was established in 1809, and currently consists of 19 townships, 7 villages and 3 cities. The City of Norwalk is the county seat.

Established in 1838 after being split off from the original Huron County, Erie County currently consists of 9 townships, 5 villages and 4 cities. The county seat is the City of Sandusky.

The Village of Milan is located partially in Erie and Huron Counties, while the Village of Plymouth is located in both Huron and Richland Counties. The City of Bellevue is partially located in Erie and Huron Counties, as well as partially in Seneca and Sandusky Counties. The City of Vermilion is partially located in Erie County, with the remainder of Vermilion is part of Lorain County.

The Region is centrally located in northern Ohio, with Erie County bordering Lake Erie. The Huron and Vermilion Rivers are located in both Erie and Huron Counties and provide recreational boating access to Lake Erie.

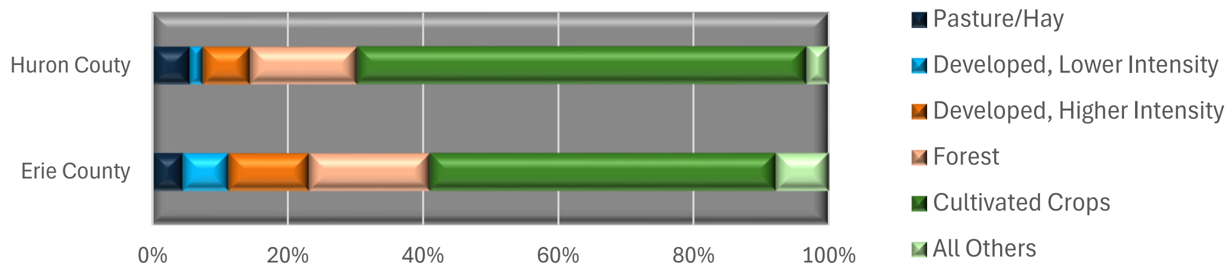
The map at right uses the City of Norwalk as the point from which the 50 and 100 mile radii are drawn to depict the Region's geographic proximity to several major cities and their respective amenities.



Land Use

Huron County has a total land area of 493.1 square miles, of which 66.41% is used for the production of cultivated crops. Another 5.50% is used as pasture/hay fields. "Lower intensity" developed land accounts for 6.93% of land in Huron County, with only 2.01% being considered "higher intensity."

More than half (51.40%) of Erie County's 254.5 square miles is used for the production of cultivated crops, with an additional 4.47% used as pasture/hay fields. Erie County has a greater percentage of its land classified as developed land relative to Huron County, with "lower intensity" accounting for 11.91% and "higher intensity" accounting for 6.87%.



Source: Ohio Department of Development

Agriculture

Agriculture has been, and continues to be, an important part of the Region's economy. In total, the Region has a total of 1,192 farms that have a combined 326,959 acres of land. This equates to an average farm size of 274 acres.

Cash receipts generated from the Region's farms total more than $294 million. Crops account for 75.4% of the total cash receipts, with livestock and related products comprising the balance.

Agriculture Overview:	Erie County	Huron County	Region
Total acres of farmland	86,440	240,519	326,959
Total number of farms	382	810	1,192
Average farm size (acres)	226	297	274
Total cash receipts	$94,205,000	$199,958,000	$294,163,000
Average cash receipts per farm	$246,609	$246,862	$246,781
Crop receipts	$86,949,000	$134,900,000	$221,849,000
Livestock receipts	$7,256,000	$65,059,000	$72,315,000

Source: Ohio Department of Development

Population Trends

A review of past Decennial Census population estimates reveals that Erie County's population peaked in 1980 at 79,655 and has since declined to 75,622 in 2020, while Huron County's population peaked in 2010 at 59,626 and has since decreased to 58,565 in 2020.

Source: Ohio Department of Development

SWOT Analysis

When corporate decision makers consider expanding or relocating a facility, many factors are considered. A comprehensive site selection process goes well beyond finding a suitable building or site. A comparative analysis of locations is conducted to better understand the operating environment and costs. The following SWOT Analysis will provide an in-depth evaluation of the following location factors that are typically part of a corporate site selection decision process:

- Workforce
- Demographic profile
- Transportation
- Infrastructure
- Tax Climate
- Economic climate
- Quality of Place
- Available real estate inventory

The relative importance of each location factor may vary significantly depending upon the industry sector to which it is being applied. This SWOT analysis, and subsequent recommendations, are informed by these differences in relative importance as applied to various industry sectors.

Workforce

Among the many location factors that influence corporate site selection decisions, workforce availability, skills and costs found within a community's regional labor market area is arguably more important than ever. The rapid pace of technological advances has been a key driver, particularly in manufacturing, for the increased demand for a skilled and educated workforce. Area Development Magazine's annual survey of site selection consultants and corporate executives further illustrates this point. Among the 30 site selection factors included in the 2023 survey, the availability of skilled labor was ranked as the most important site selection factor among consultants and 2nd most important among corporate executives. Labor costs were ranked as the 1st most important site selection factor for corporate executives.

Workforce Factors

- Commuting Patterns
- Employment Trends
- Wage Rates
- Educational Attainment

The following section of the SWOT Analysis will include an analysis of commuting patterns, unemployment and employment trends, wage rates and educational attainment in the Region.

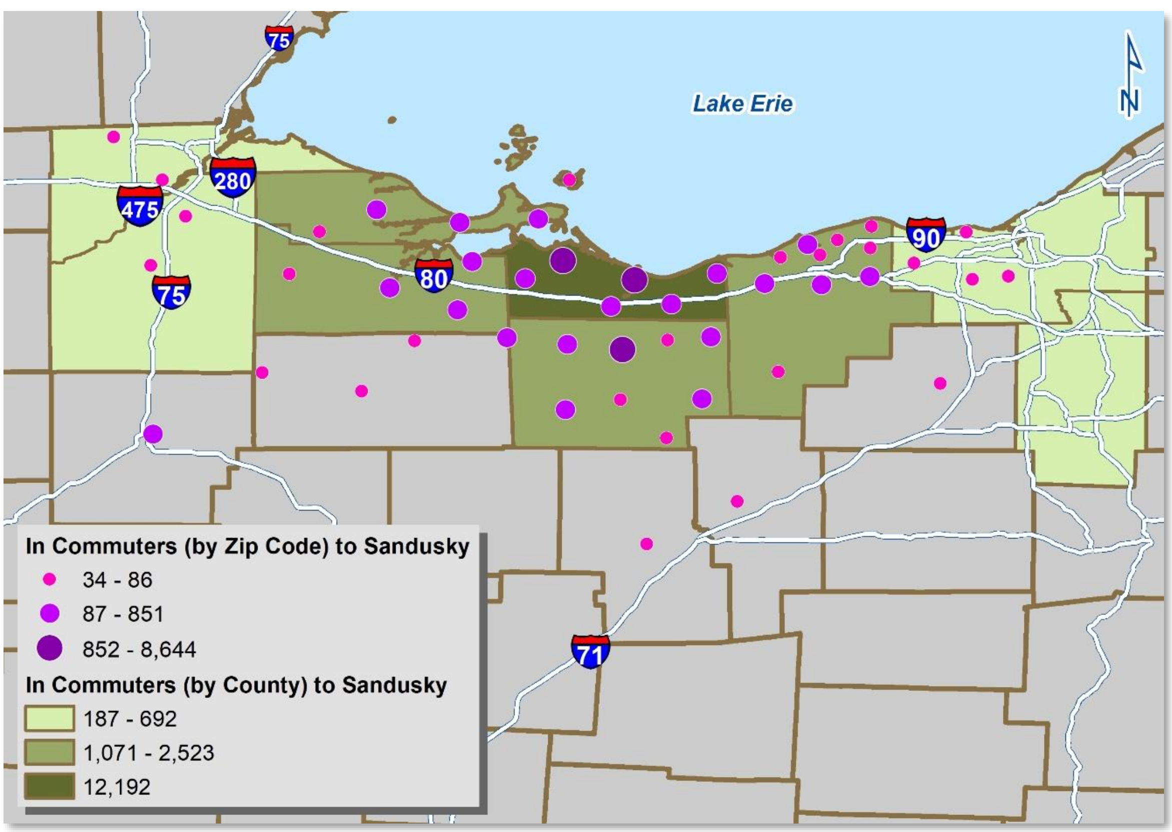
Commuting Patterns

Defining the geographic market area is an important component of any regional economic analysis. Typically, this is accomplished through an analysis of commuting patterns. Commuting pattern data are published by the U.S. Census Bureau's Center for Economic Studies. The origin and destination of workers are provided. Commuting patterns provide an indication as to the degree of economic integration between two geographic areas. A resident of one area who commutes to another area for work generates a series of economic activities in both geographic areas. It is this concept that forms the basis for the U.S. Census Bureau's designation of metropolitan, micropolitan, and combined statistical areas.

The following maps depict, by county and zip code, the number of in-commuters to the zip codes that include the cities of Sandusky (44870), Norwalk (44857) and Willard (44890), which are the three largest employment centers in the Region.

City of Sandusky: In-Commuters By County & Zip Code

The map below depicts the top 9 counties and 50 zip codes where those employed in Sandusky (zip code 44870) live (i.e. commute in from). Based on the county-to-county commuting pattern analysis, the regional labor market area ("RLMA") for Sandusky can be defined as Erie, Huron, Sandusky, Lorain and Ottawa counties. Workers residing in these five counties account for nearly 78% of those working in the Sandusky zip code.



County	Number	Percent
All Counties	23,643	100.0%
Erie County, OH	12,192	51.6%
Huron County, OH	2,523	10.7%
Sandusky County, OH	1,491	6.3%
Lorain County, OH	1,186	5.0%
Ottawa County, OH	1,071	4.5%
Cuyahoga County, OH	692	2.9%
Lucas County, OH	443	1.9%
Franklin County, OH	249	1.1%
Summit County, OH	218	0.9%
Wood County, OH	187	0.8%
All Other Locations	3,391	14.3%

Zip Code	Number	Percent
All ZIP Codes	23,643	100.0%
44870 - Sandusky	8,644	36.6%
44839 - Huron	1,647	7.0%
44857 - Norwalk	1,395	5.9%
44811 - Bellevue	851	3.6%
44824 - Castalia	595	2.5%
43452 - Port Clinton	569	2.4%
43420 - Fremont	513	2.2%
44089 - Vermilion	384	1.6%
43410 - Clyde	376	1.6%
44846 - Milan	337	1.4%
All Other Locations	8,332	35.3%

The top 10 zip codes of residence for workers employed in Sandusky's zip code account for nearly 65% of the total employment. Seven of these 10 zip codes are located entirely, or partially, in the Counties.

Source: U.S. Census Bureau, Center for Economic Studies (2020)

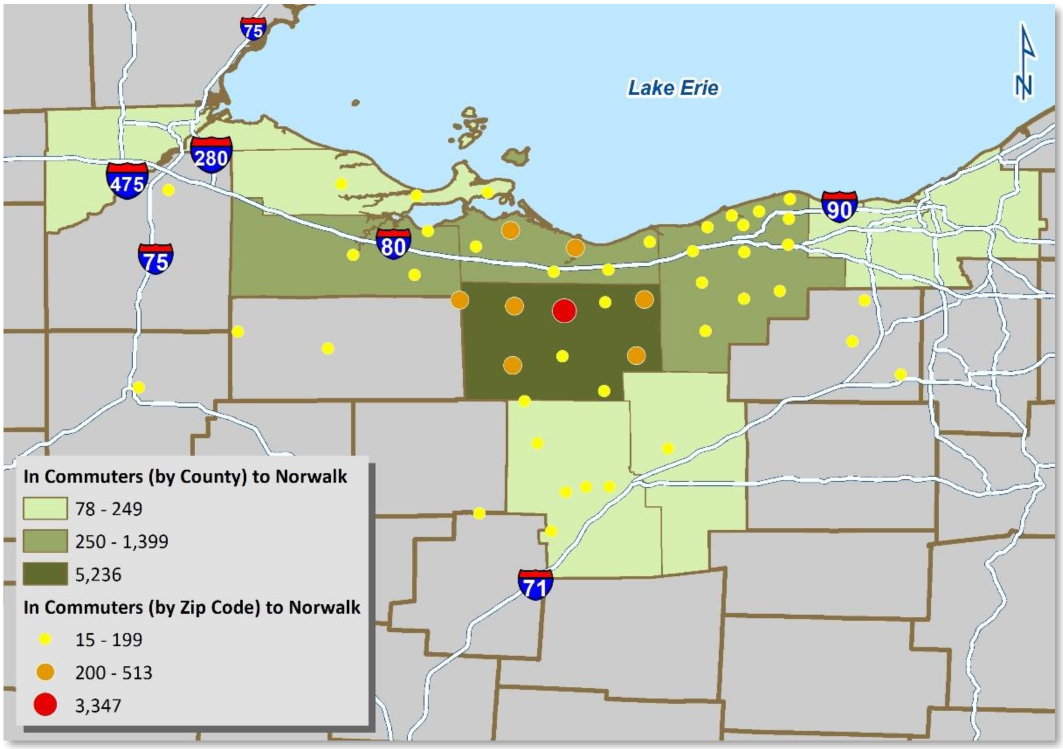
City of Norwalk: In-Commuters by County and Zip Code

Huron and Erie Counties are home to 69.2% of workers employed in Norwalk. With the additional 5.4% and 3.6% of commuters from Lorain and Sandusky Counties, respectively, the top 4 counties would comprise the RLMA for Norwalk, with 78.2% of workers residing in these counties.

County	Number	Percent
All Counties	9,588	100.0%
Huron County, OH	5,236	54.6%
Erie County, OH	1,399	14.6%
Lorain County, OH	522	5.4%
Sandusky County, OH	348	3.6%
Cuyahoga County, OH	165	1.7%
Richland County, OH	153	1.6%
Ashland County, OH	142	1.5%
Ottawa County, OH	131	1.4%
Lucas County, OH	109	1.1%
Franklin County, OH	78	0.8%
All Other Locations	1,305	13.6%

Zip Code	Number	Percent
All ZIP Codes	9,588	100.0%
44857 - Norwalk	3,347	34.9%
44870 - Sandusky	513	5.4%
44889 - Wakeman	398	4.2%
44890 - Willard	355	3.7%
44851 - New London	331	3.5%
44839 - Huron	325	3.4%
44811 - Bellevue	319	3.3%
44847 - Monroeville	308	3.2%
44846 - Milan	190	2.0%
44837 - Greenwich	151	1.6%
All Other Locations	3,351	34.9%

The top 10 zip codes of residence for workers employed in Norwalk's zip code account for 65.1% of the total employment. All 10 of these zip codes are located entirely, or partially, in the Counties.



Source: U.S. Census Bureau, Center for Economic Studies

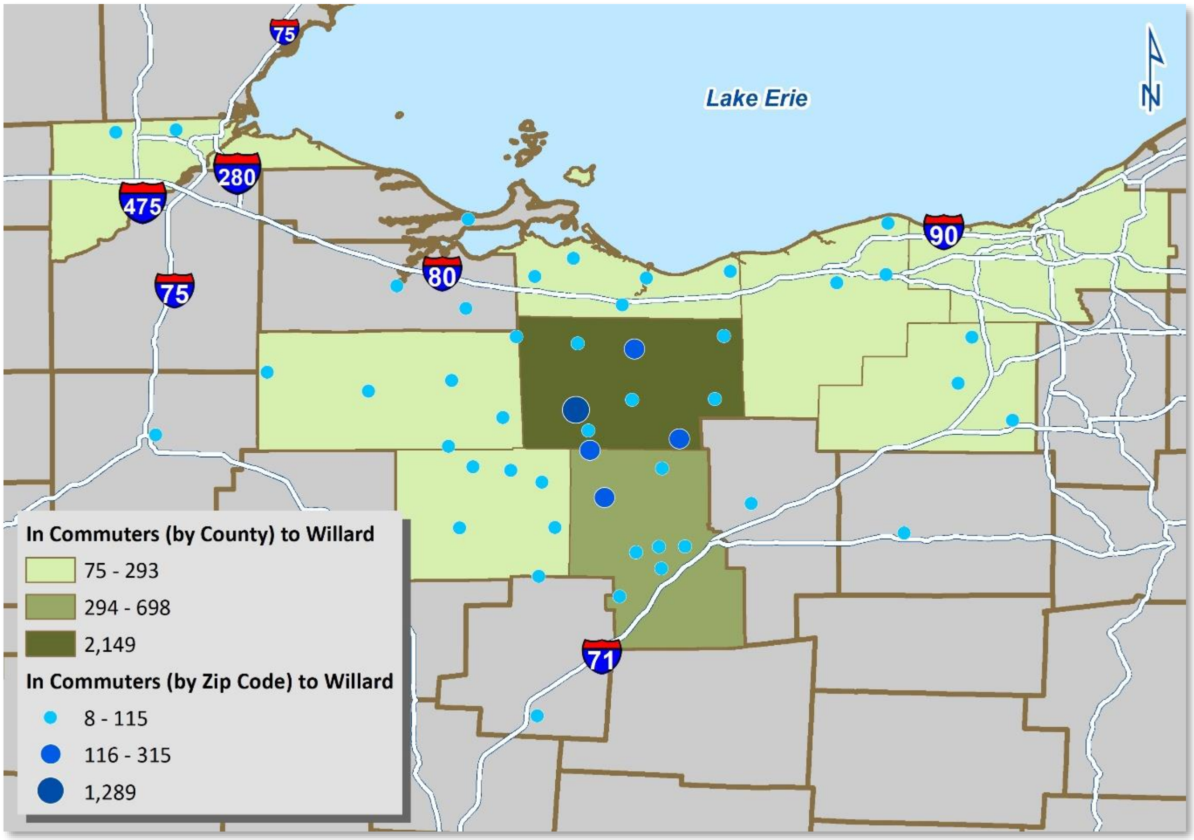
City of Willard: In-Commuters by County & Zip Code

The City of Willard draws workers from a broad geographic area, and includes many smaller and rural communities, especially as compared to Sandusky and Norwalk.

County	Number	Percent
All Counties	4,801	100.0%
Huron County, OH	2,149	44.8%
Richland County, OH	698	14.5%
Crawford County, OH	293	6.1%
Seneca County, OH	293	6.1%
Cuyahoga County, OH	111	2.3%
Erie County, OH	101	2.1%
Lorain County, OH	91	1.9%
Lucas County, OH	82	1.7%
Franklin County, OH	77	1.6%
Medina County, OH	75	1.6%
All Other Locations	831	17.3%

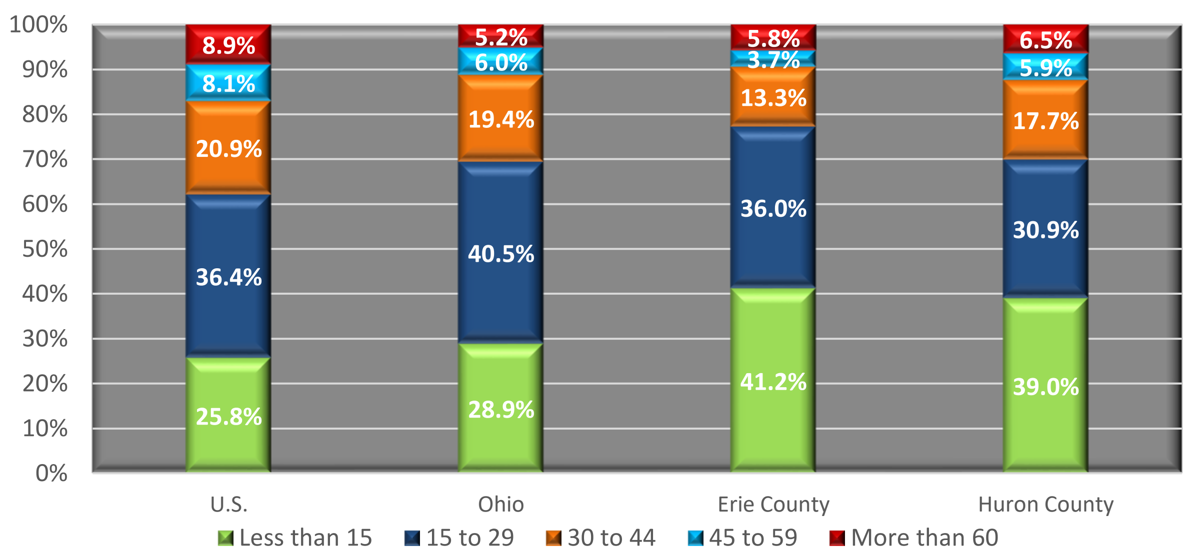
Zip Code	Number	Percent
All ZIP Codes (ZCTA)	4,801	100.0%
44890 - Willard	1,289	26.8%
44875 - Shelby	315	6.6%
44865 - Plymouth	226	4.7%
44857 - Norwalk	207	4.3%
44837 - Greenwich	187	3.9%
44855 - North Fairfield	115	2.4%
44807 - Attica	108	2.2%
44818 - Bloomville	87	1.8%
44903 - Mansfield	81	1.7%
44854 - New Washington	79	1.6%
All Other Locations	2,107	43.9%

With Willard's location in the southwestern portion of Huron County, the spatial distribution of commuters to Willard is noticeably different from the patterns found in Sandusky and Norwalk. Specifically, in-commuters to Willard are much less concentrated along the I-80/90 corridor.



Source: U.S. Census Bureau, Center for Economic Studies

Travel Time to Work



Erie County has the greatest percentage of residents with travel times to work of less than 30 minutes (71.2%) among the comparison geographies, followed by Huron County (69.9%). Erie and Huron Counties have lower percentages of residents, as compared to the U.S., that travel more than 60 minutes to work, although greater percentages when compared to Ohio. This could be an indication of the Region's proximity to major cities, such as Cleveland and Toledo, and their associated diversity of employment opportunities.

Source: U.S. Census Bureau, 2022 American Community Survey, 1-year estimate

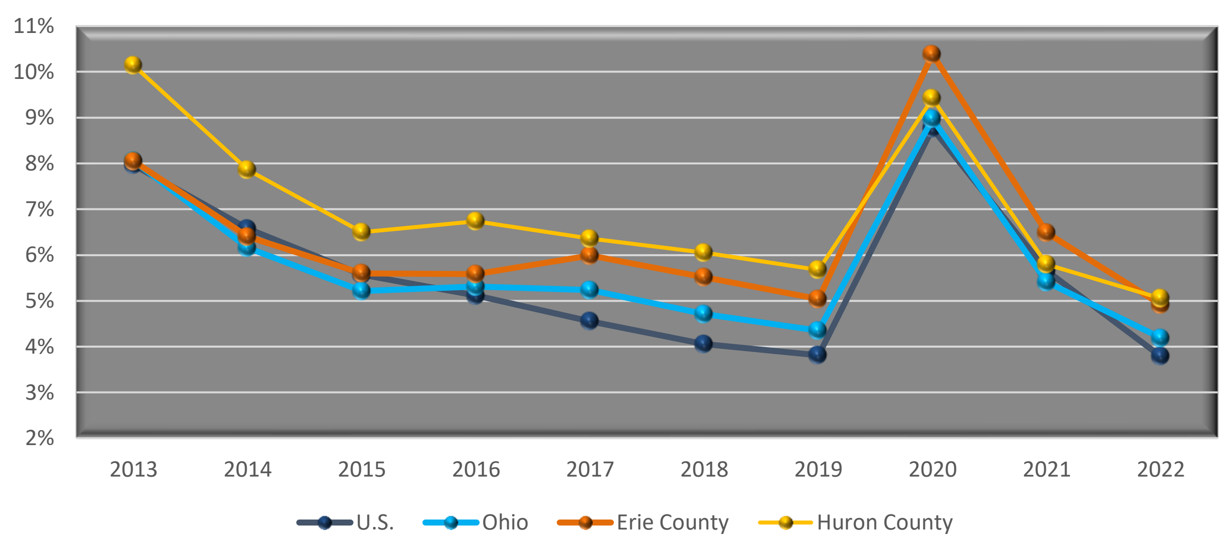
EMPLOYMENT TRENDS

Unemployment rate trends not only indicate the relative economic health of a community, but also provide an estimate of the available labor force. When unemployment rates fall below 4%, some economists consider this to be near the point of "full employment," where issues may arise as to whether the available labor pool is sufficient to meet local/regional workforce needs, both in terms of required skill sets and the total number of workers available. This situation can be viewed negatively by companies evaluating locations for potential expansion or relocation projects, as the competition between companies for available workers will likely drive up the cost of labor.

Unemployment rates can be deceiving when not analyzed in conjunction with total employment estimates. For example, it is possible for total employment and the unemployment rate to increase during the same time period, based upon changes in the total labor force.

Many communities, especially those that have lost a major employer, experience underemployment, in which the skills and experience of displaced workers exceed the requirements, and the compensation being offered, for available job opportunities. However, underemployment is notoriously difficult to measure.

ANNUAL UNEMPLOYMENT RATE TRENDS (2013 – 2022)



Source: Ohio Labor Market Information (LAUS)

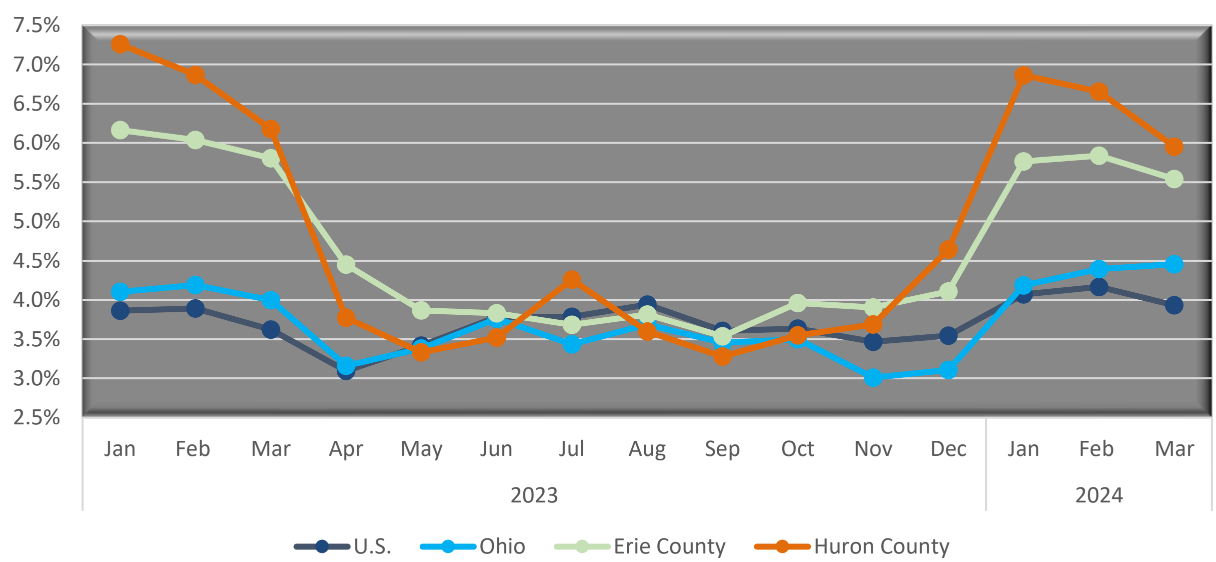
Erie County experienced its highest unemployment rate (10.4%) during the 2020 pandemic year, while its lowest unemployment rate during this time period occurred in 2022 (4.9%).

Huron County's highest unemployment rate during this time period was 10.1% in 2013, and as was the case with Erie County, had its lowest unemployment rate in 2022 (5.1%).

Annual labor force data for Erie and Huron Counties are provided in the table below.

Year	Erie County				Huron County			
	Labor Force	Employed	Unemployed	Rate	Labor Force	Employed	Unemployed	Rate
2018	38,100	36,000	2,100	5.5%	28,100	26,500	1,700	6.0%
2019	37,700	35,800	1,900	5.0%	28,200	26,600	1,600	5.7%
2020	36,600	32,800	3,800	10.4%	27,600	25,000	2,600	9.4%
2021	37,000	34,700	2,400	6.5%	27,600	26,000	1,600	5.8%
2022	36,600	34,800	1,800	4.9%	27,700	26,300	1,400	5.1%
Avg. 2018-22	37,200	34,820	2,400	6.5%	27,840	26,080	1,780	6.4%

Monthly Unemployment Rate Trends (2023-24)



Source: Ohio Labor Market Information (LAUS)

Since the beginning of 2023, the average monthly unemployment rate for both Counties is approximately 1 percentage point greater than that of Ohio and the U.S. The Counties experience significantly greater seasonality, with the average Q1 unemployment rate several percentage points greater than during the remainder of the year.

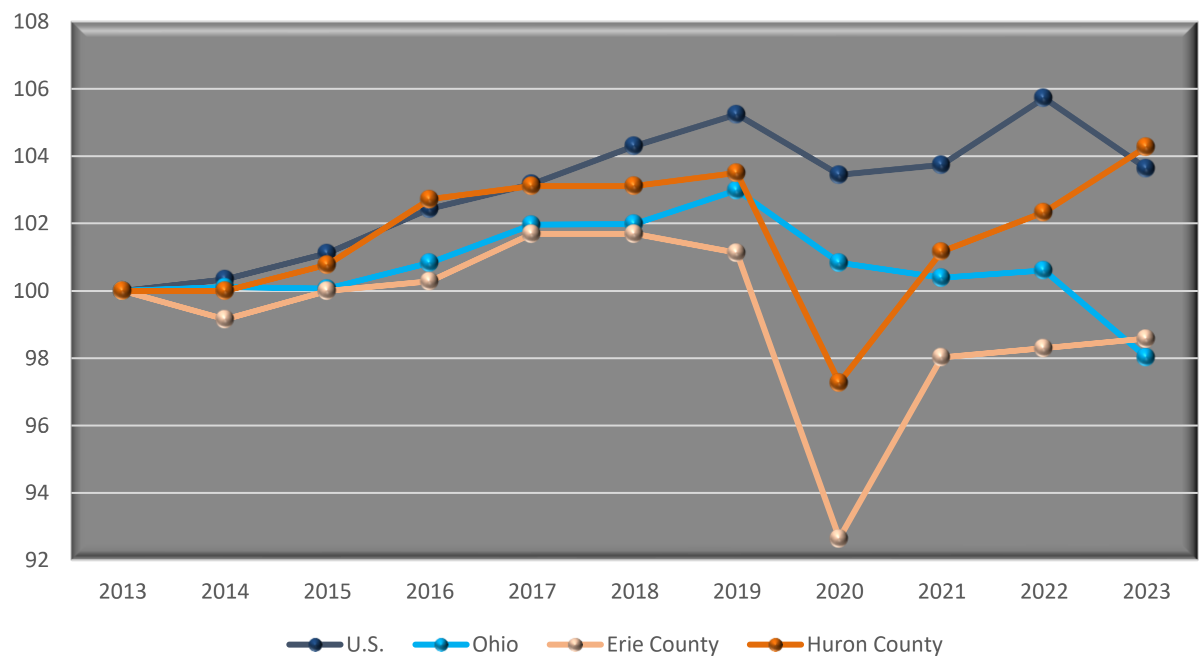
Detailed monthly labor force statistics for Erie and Huron County are provided in the table below.

Area	Low Month	High Month	Average Rate
Erie County	Sep. 2023 (3.5%)	Jan. 2023 (6.2%)	4.7%
Huron County	Sep. 2023 (3.3%)	Jan. 2023 (7.3%)	4.9%
Ohio	Nov. 2023 (3.0%)	Mar. 2024 (4.5%)	3.7%
U.S.	Apr. 2023 (3.1%)	Feb. 2024 (4.2%)	3.7%

Erie and Huron Counties have the same low and high month for unemployment rate during the time period depicted on the graph above.

EMPLOYMENT INDEX: ALL INDUSTRY SECTORS (2013 – 2023)

The graph below measures the annual percentage of change in total employment, across all industry sectors, from 2013 through 2023. The index value for each of the comparison geographies is set to 100 for the first year of the study period.



Source: Ohio Labor Market Information (LAUS)

During the study period, total employment increased in Huron County (4.3%) and the U.S. (3.6%) but decreased in Erie County (-1.4%) and Ohio (-2.0%). Erie and Huron Counties were impacted more severely by the 2020 pandemic year than Ohio (-2.7%) and the U.S. (-1.8%), with total employment losses of 8.4% and 6.2% respectively from 2019.

The table below indicates the year in which each of the comparison geographies experienced their lowest and highest total employment levels.

Since 2010, total employment in Erie County peaked in 2017 and 2018, while 2023 was the peak for Huron County. Both counties experienced their low point for total employment in the 2020 pandemic year.

Total Employment - All Industry Sectors				
2010 - 2023	U.S.	Ohio	Erie County	Huron County
Low Year	2013	2023	2020	2020
High Year	2022	2019	2017/2018	2023

Wage Rates

Wage rate comparisons are almost always included in the location analysis for business expansion or relocation projects. While the table below includes average annual wage data for broad industry sectors, when responding to an actual project lead, providing wage rates for specific occupations that are of importance to the prospect is appropriate.

Average Annual Wages by Industry Sector (2023)

Average Annual Wages by Industry	U.S.	Ohio	Erie County	Huron County
Total - All Industries	$70,346	$60,639	$45,343	$49,693
Natural resources and mining	$66,444	$56,644	$48,243	$38,765
Construction	$73,445	$70,575	$57,944	$80,133
Manufacturing	$79,483	$70,003	$59,199	$55,494
Trade, transportation, and utilities	$58,048	$53,761	$42,793	$48,035
Information	$145,214	$87,631	$53,466	$46,944
Financial activities	$116,786	$88,480	$70,766	$51,936
Professional and business services	$93,741	$79,141	$56,120	$42,801
Education and health services	$60,936	$57,243	$53,736	$49,209
Leisure and hospitality	$30,560	$24,472	$28,650	$16,893
Other services	$48,549	$41,671	$33,806	$31,257

Source: U.S. Bureau of Labor Statistics (QCEW)

Among the comparison geographic areas, average annual wages in Erie and Huron Counties are less than Ohio and the U.S. across every industry listed, with the exception of Leisure and Hospitality wages being higher in Erie County versus Ohio.

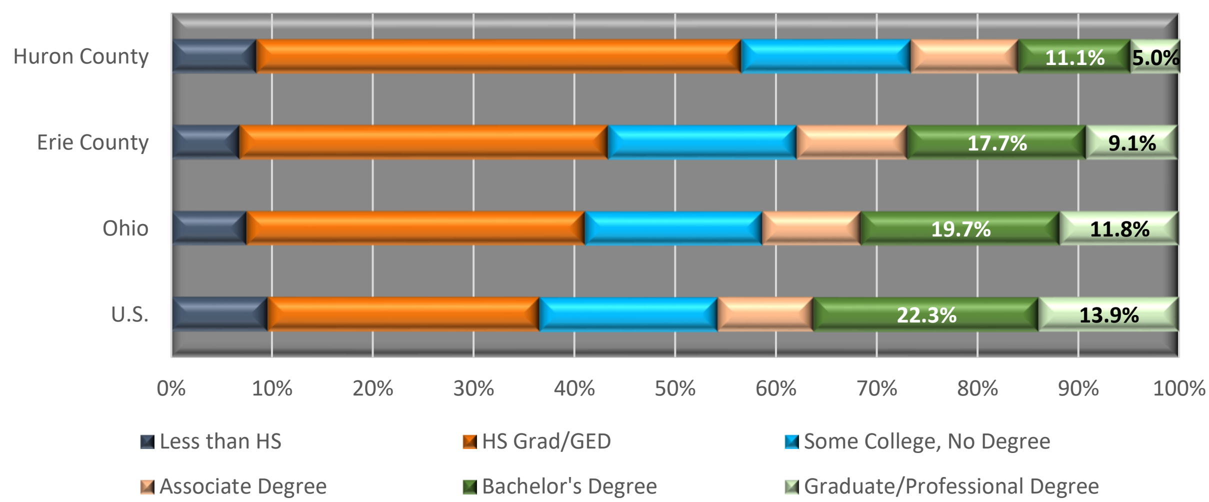
As previously noted, labor costs are typically one of the most important site selection factors, so this point should be taken into consideration when working on business attraction opportunities. However, some of the differences in wages may not be solely reflective of market size or cost of living, but potentially due to the local occupational mix within each industry (i.e. greater local prevalence of lower paying occupations).

From the economic developer's vantage point, higher wages are viewed positively, as a quality of life indicator. However, it's important to keep in mind that higher wages, through the lens of a prospective company, could be viewed negatively as an indicator of higher operating costs.

Educational Attainment

An educated and skilled workforce can give a region a competitive advantage not only when pursuing business attraction opportunities, but it may also provide an environment conducive for expansion opportunities for existing companies. Many of the fastest growing industry sectors and occupations require individuals to have some postsecondary certification or degree. Educational attainment and income potential are also positively correlated.

Educational Attainment



Source: ESRI Business Analyst Online (2023)

Relative to the U.S., Erie and Huron Counties have a significantly lower percentage of its population with a bachelor's degree or higher. The table below summarizes the educational attainment levels for Erie and Huron Counties by number and percentage.

Educational Attainment		Erie County	Huron County	Ohio	U.S.
Less than HS Grad	Number	3,794	3,455	622,675	22,425,228
	Percent	6.8%	8.5%	7.5%	9.6%
HS Grad/GED	Number	20,422	19,549	2,789,582	63,070,954
	Percent	36.6%	48.1%	33.6%	27.0%
Some College	Number	10,434	6,828	1,461,210	41,346,514
	Percent	18.7%	16.8%	17.6%	17.7%
Assoc. Degree	Number	6,138	4,349	813,628	22,191,632
	Percent	11.0%	10.7%	9.8%	9.5%
Bach. Degree	Number	9,876	4,511	1,635,558	52,091,936
	Percent	17.7%	11.1%	19.7%	22.3%
Grad/Prof Degree	Number	5,078	2,032	979,675	32,469,862
	Percent	9.1%	5.0%	11.8%	13.9%

Erie & Huron: Workforce & Labor Market

Strengths

- Access to large regional labor shed
- Shorter commute times

Weaknesses

- High seasonality
- Lower educational attainment, especially those with a BA+

Opportunities

- Increase postsecondary educational opportunities in the Region

Threats

- Aging population = aging workforce (how to replace these workers?)

Demographic Profile

A community's demographic profile is often a good indicator of its economic health and stability. Communities with growing populations and rising or above average income levels are likely to be locations where good employment opportunities are more plentiful, relative to communities with shrinking populations and declining or below average income levels. If evaluating two otherwise equal locations, the community with positive trending demographics will likely be selected for the capital investment.

Demographic Profile

- Population
- Income
- Housing

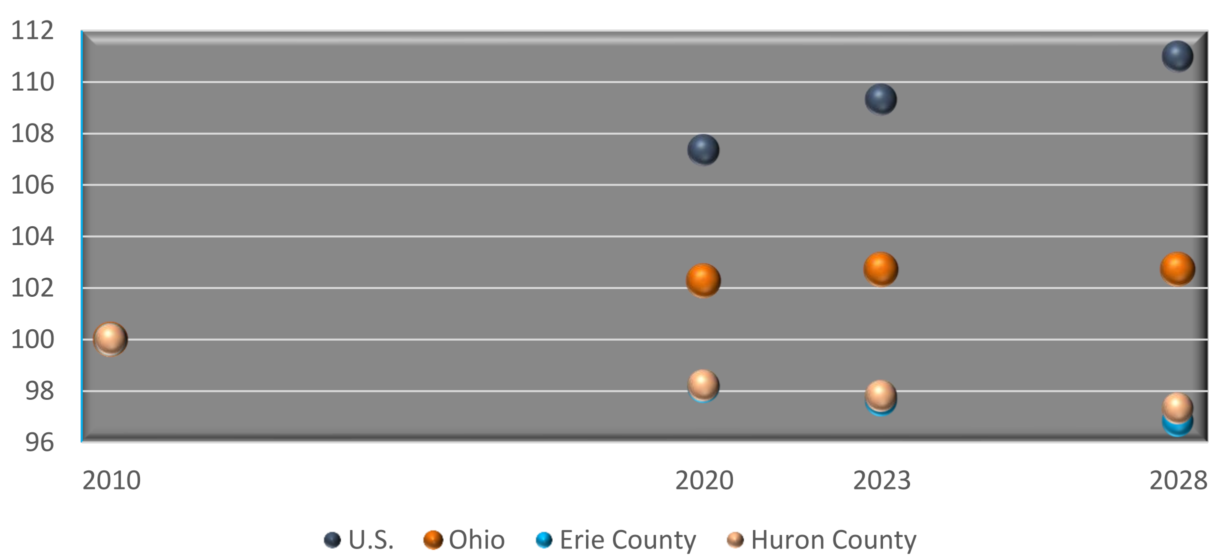
This section of the SWOT Analysis will include a comparative analysis of population, income and housing trends.

Population

Population trends can provide useful insights into the current state of a community. While there can be many reasons contributing to population changes within a community, this SWOT Analysis looks at changes in population from the perspective of a company evaluating potential business locations. A growing population may indicate that a community offers desirable amenities or economic opportunities that can entice people to relocate. Conversely, a declining population may indicate that a community lacks sufficient amenities or economic opportunities to retain its current residents.

The following will include an analysis of population trends, a population growth index and population by age cohort.

Population Growth Index: 2010 – 2028



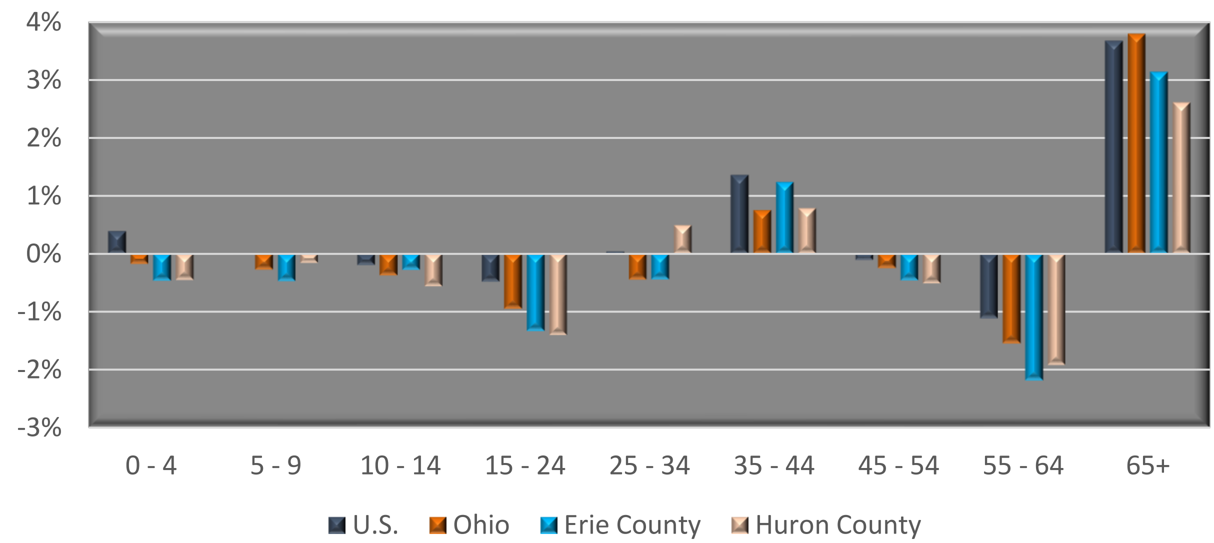
Source: U.S. Census Bureau; ESRI Business Analyst Online (2023)

The population growth index measures the annual percentage change for each of the comparison geographic areas. From 2010 to 2023, the Counties both experienced a decrease in population, while Ohio and the U.S. both increased. Erie and Huron Counties are projected to continue losing population between 2023 and 2028.

Population totals from the previous graph are provided in the table below.

Year	U.S.	Ohio	Erie County	Huron County
2010	308,745,538	11,536,504	77,054	59,626
2020	331,449,281	11,799,448	75,622	58,565
2023	337,470,185	11,849,286	75,218	58,319
2028	342,640,129	11,850,386	74,611	58,030
2010-23	28,724,647	312,782	-1,836	-1,307
% Chg.	9.3%	2.7%	**-2.4%**	**-2.2%**
2023-28	5,169,944	1,100	-607	-289
% Chg.	1.5%	0.0%	**-0.8%**	**-0.5%**

Change in Population by Age (2020 – 2028)



Source: U.S. Census Bureau; ESRI Business Analyst Online (2023)

Huron County is the only area depicted on the graph above that is projected to experience population growth for the key employment age cohort of 25 to 34. The 35 to 44 age cohort is projected to increase at a faster rate in Erie and Huron Counties as compared to Ohio, but not as compared to the U.S. The fastest growing age cohort across all the comparison geographies during this time period is for individuals aged 65 and older.

Huron County is projected to experience population growth in only 3 of the 9 age cohorts shown above, while Erie County's population growth is in just 2 of the 9 age cohorts.

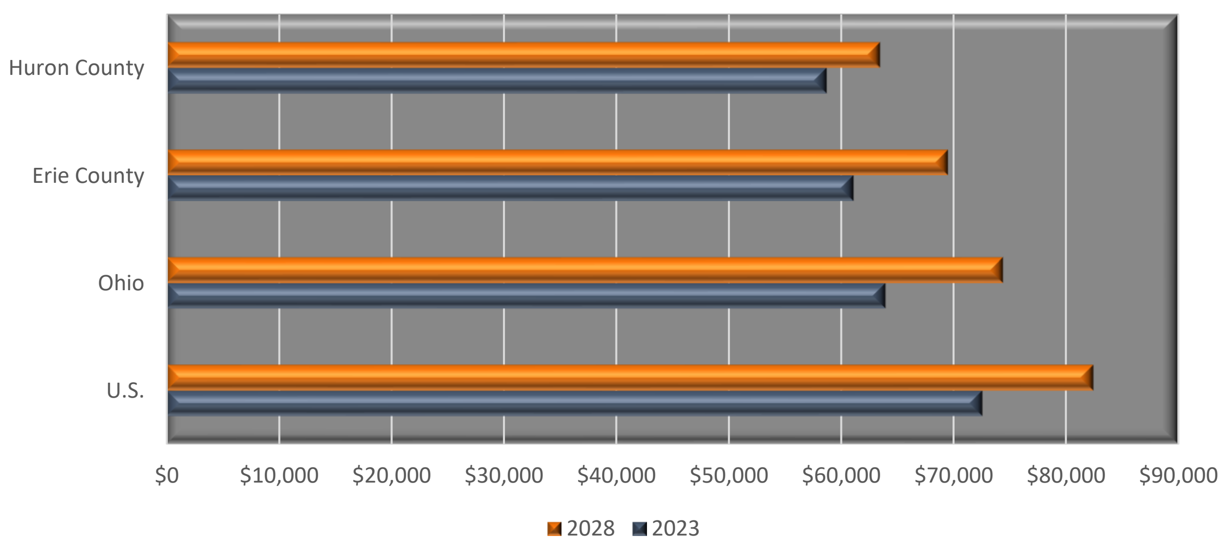
The table below provides the projected population change by age cohort from 2020 to 2028.

Population Change by Age Cohort (2020-2028)										
		0 to 4	5 to 9	10 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
U.S.	# Change	1,311,968	-2,639	-643,155	-1,595,378	140,204	4,504,999	-336,726	-3,673,601	12,159,266
	% Change	0.4%	0.0%	-0.2%	-0.5%	0.0%	1.4%	-0.1%	-1.1%	3.7%
Ohio	# Change	-20,848	-32,495	-44,142	-111,780	-52,783	89,065	-29,337	-182,577	447,582
	% Change	-0.2%	-0.3%	-0.4%	-0.9%	-0.4%	0.8%	-0.2%	-1.5%	3.8%
Erie County	# Change	-349	-354	-208	-1,007	-334	938	-346	-1,649	2,374
	% Change	-0.5%	-0.5%	-0.3%	-1.3%	-0.4%	1.2%	-0.5%	-2.2%	3.1%
Huron County	# Change	-265	-91	-328	-821	288	461	-300	-1,122	1,526
	% Change	-0.5%	-0.2%	-0.6%	-1.4%	0.5%	0.8%	-0.5%	-1.9%	2.6%

INCOME

Evaluating a community's income levels can provide an indication of the economic stability of its residents. Income data are also often analyzed to identify local or regional market opportunities, which is particularly important for companies whose location decisions rely on the availability of discretionary spending within a specific trade or service area. The following will provide data for median household income, per capita income, and households by income.

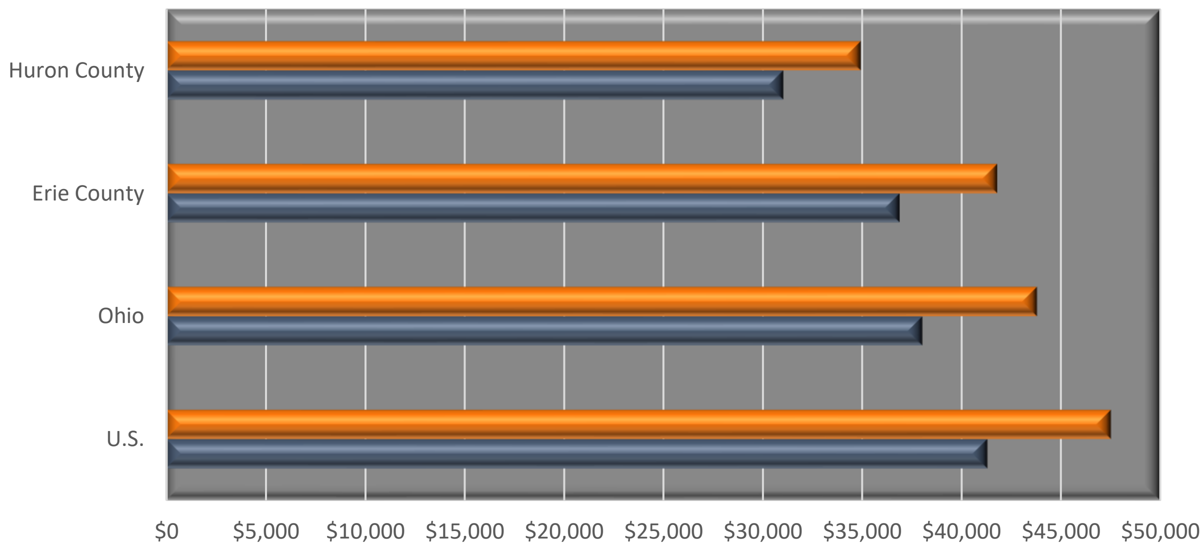
MEDIAN HOUSEHOLD INCOME



Source: ESRI Business Analyst Online (2023)

For 2023, Erie County's median household income of $61,105 is 95.5% of Ohio's median household income, while Huron County's $58,729 is 8.2% less than Ohio. Median household income in Huron County is projected to grow at a slower rate (8.0%) than the comparison geographies. Erie County's median household income is projected to grow at a slightly faster rate than (13.7%) versus Ohio (13.5%).

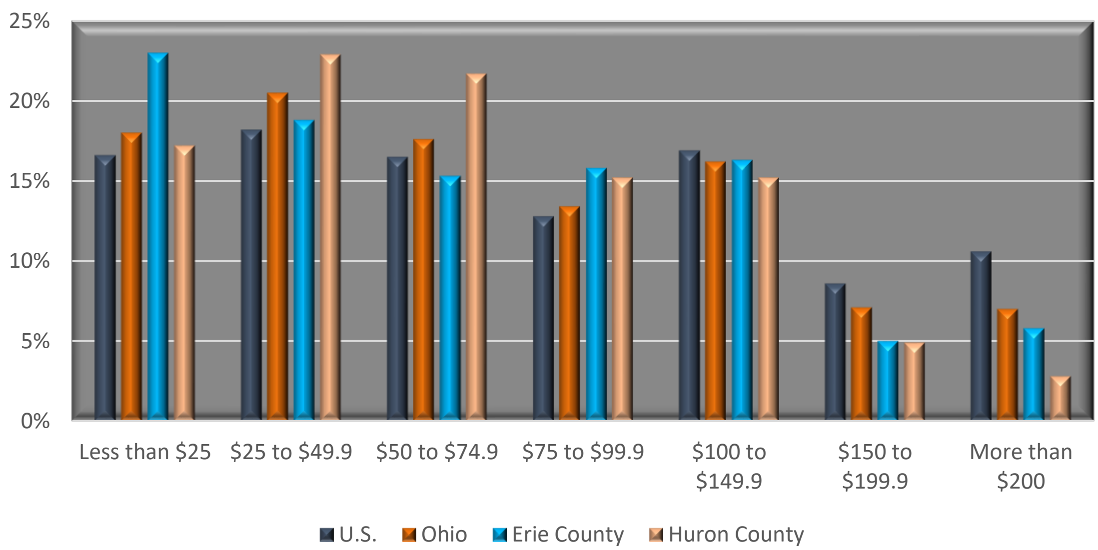
Per Capita Income



Source: ESRI Business Analyst Online (2023)

The same general patterns hold true for per capita income as with median household income, although in this case, Erie County's projected per capita income growth rate, from 2023 to 2028, trails that of Ohio.

Households by Income ($ 000s)



Source: ESRI Business Analyst Online (2023)

Twenty-three percent of households in Erie County have an annual income of less than $25,000 per year, while 44.6% of households in Huron County have annual incomes between $25,000 and $75,000. The Counties significantly trail Ohio and the U.S. in the percentage of households with annual incomes of greater than $150,000.

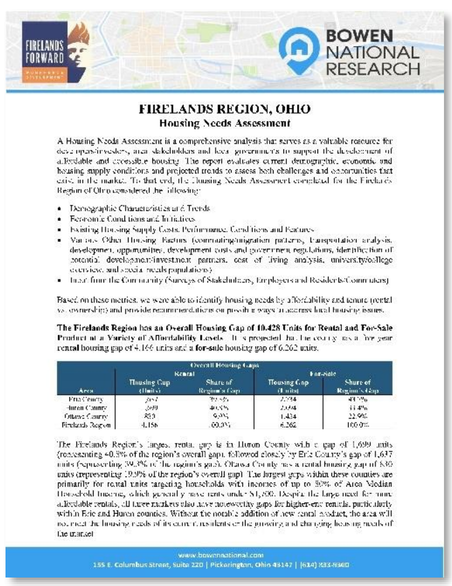
The table below provides the total number of households per income bracket.

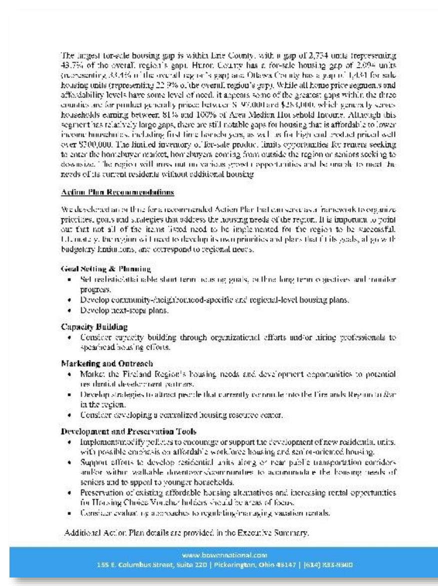
Households by Income ($000s)	Erie County: # of HHs	Erie County: % of HHs	Huron County: # of HHs	Huron County: % of HHs	U.S.: % of HHs	Ohio: % of HHs
Less than $25	7,443	23.0%	4,045	17.2%	16.6%	18.0%
$25 to $49.9	6,084	18.8%	5,385	22.9%	18.2%	20.5%
$50 to $74.9	4,951	15.3%	5,103	21.7%	16.5%	17.6%
$75 to $99.9	5,113	15.8%	3,575	15.2%	12.8%	13.4%
$100 to $149.9	5,275	16.3%	3,575	15.2%	16.9%	16.2%
$150 to $199.9	1,618	5.0%	1,152	4.9%	8.6%	7.1%
More than $200	1,877	5.8%	658	2.8%	10.6%	7.0%

HOUSING

Bowen National Research completed a Housing Needs Assessment in 2023 that included Erie and Huron Counties, as well as Ottawa County. The Assessment concluded that, over the next five years, there is a combined gap of nearly 4,800 for-sale housing units and over 3,300 rental housing units exist in Erie and Huron Counties.

The Assessment is available for download on FirelandsForward.com.





Demographic Profile SWOT and Recommendations

Erie & Huron: Demographic Profile

Strengths

- Income growth (but at a slower rate than OH and US)

Weaknesses

- Population growth concentrated in those aged 65+

Opportunities

- Attract younger professionals and families

Threats

- Continued population decline

Transportation

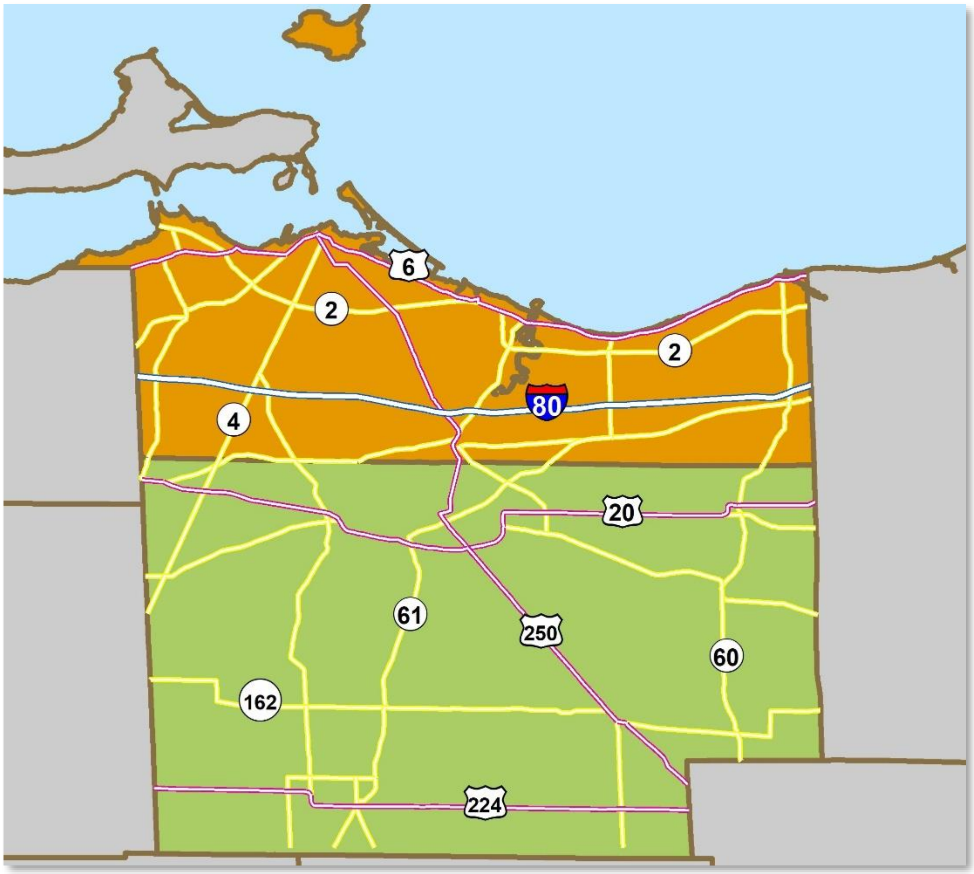
A region's transportation network can be the difference between winning and losing a variety of project types. Distribution centers require proximity to interstate highways, branch facilities may require proximity to an airport with nonstop flights to its headquarters city, while a R&D center may benefit from proximity to a four-year university with specific degree programs. While not as broadly used as trucking, freight rail service and water port access can be critical site selection factors for some energy-intensive and commodity based industry sectors. A region's transportation network not only impacts the efficiency of moving goods, but also the movement of people, including the area from which a company is able to hire employees.

Transportation

- Highway Network
- Railroad Network
- Airport Access
- Navigable Waterways/Ports

This section of the Analysis will provide an overview of the transportation networks serving the Region, including the highways, railroads, airports and water ports.

Highway Network

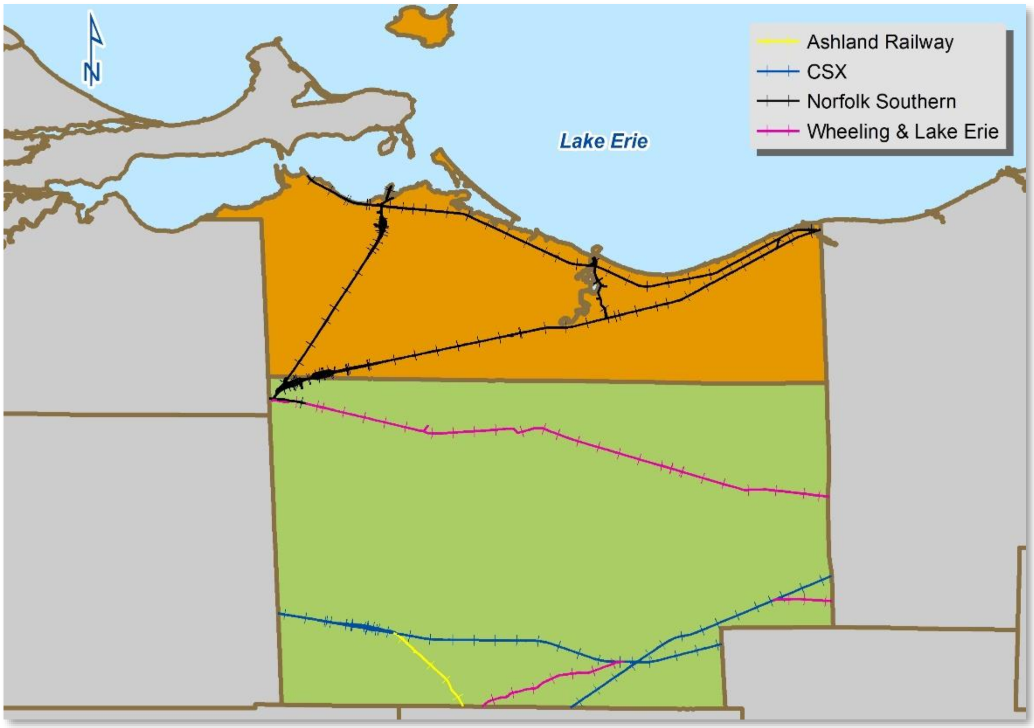


Highways are the primary mode of transportation for people and goods. As such, "highway accessibility" was ranked as the 8th most important site selection factor, out of 30, by consultants and 9th by corporate executives in Area Development's 2023 survey. During a competitive site selection process, proximity to an interstate highway is often an explicitly stated requirement.

With direct access to two Ohio Turnpike (Interstate 80/90) interchanges, along with the 4-lane divided, limited access Ohio Route 2, east-west connectivity is excellent in Erie County. In Huron County, U.S. 20 and 224 serve as key east-west trucking routes. Improving north-south access through the Counties is currently being evaluated by the Ohio Department of Transportation.

Railroad Network

"Railroad service" was ranked 30th out of 30 site selection factors included in Area Development's 2023 Corporate Survey, and 29th in the Consultants Survey. This ranking does not diminish the importance of railroads, rather it reflects the fact that most industries do not use railroad service.



Freight rail service includes Class I carriers Norfolk Southern and CSX, as well as shortline/regional carriers Wheeling & Lake Erie and Ashland Railway. The map above depicts the freight rail lines serving the Region by carrier.

Given the existing rail network, businesses that require rail service could consider the Region as a location for a new project.

Amtrak offers passenger rail service from its station in Sandusky with routes that connect Chicago to Washington DC (Capitol Limited) and Chicago to New York City/Boston (Lake Shore Limited).

Airport Access

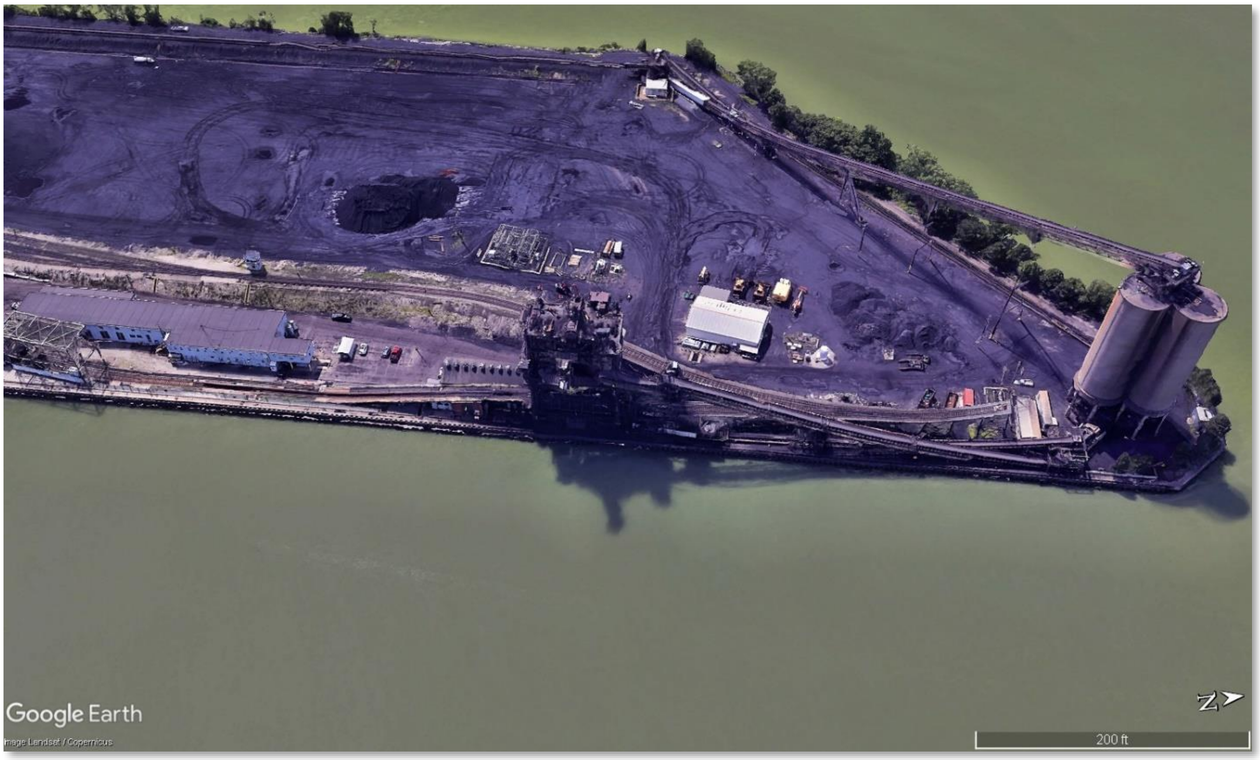
Site selection consultants ranked "Accessibility to major airport" as the 20th most important site selection factor, while corporate executives ranked it as the 25th most important, out of 30 site selection factors included in Area Development's 2023 survey.

General aviation airports in the Region include Willard Municipal Airport and the Norwalk – Huron County Airport, while the Erie – Ottawa International Airport is located in Port Clinton.

The Region has multiple options with respect to commercial airports with Cleveland Hopkins International Airport (CLE) and Detroit Metro Airport (DTW). Toledo Express Airport (TOL) offers limited flight options via Allegiant Airlines.

Navigable Waterways & Ports

Similar to railroads, "waterway or oceanport accessibility" was ranked 29th out of the 30 site selection factors included in Area Development's 2023 Corporate Survey and 28th in the Consultants Survey.



Norfolk Southern owns and operates the "Sandusky Dock" on Lake Erie. The facility handles coal and receives ships that are up to 1,000 feet long. The Sandusky Dock has an annual capacity of approximately 7 million tons during the season, which typically runs from March through December.

With the proposed riverfront development in the City of Huron utilizing space that previously received freighters, the Sandusky Dock is the only commercial port facility in the Region. As such, it is unlikely the Region would successfully attract new investment projects that are dependent on moving goods via water.

Source: https://www.norfolksouthern.com/en/ship-by-rail/industry/coal/coal-transload-facilities

Transportation Network SWOT and Recommendations

Erie & Huron: Transportation

Strengths

- Interstate 80/90
- Robust freight rail network
- Proximity to CLE and DTW

Weaknesses

- Seasonal traffic congestion along commercial corridors

Opportunities

- Improve capacity along commercial corridors
- City of Sandusky owned land east of NS Dock for future port development

Threats

- Maintenance and safety of freight rail network

Utilities

Accurate utilities information, such as existing and available capacities, are often invaluable to the site selection process. Depending on the industry sector, having the needed utilities in place, and in sufficient capacity, can be the difference between a community winning or losing a competitive site selection project. Economic development professionals with a readily available understanding and knowledge of the utilities infrastructure within their community are positioned to respond quickly and accurately to project inquiries.

Utilities

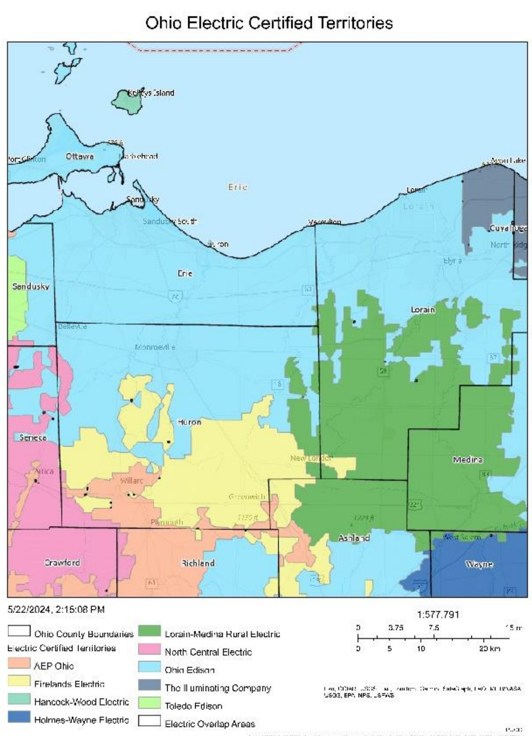
- Electric
- Gas
- Water/Sewer
- Telecom/Data

"Energy availability" was ranked as the 14th most important site selection factor by corporate executives and tied for 5th among site selection consultants in Area Development's 2023 survey. "Energy costs" were ranked 7th and 6th respectively.

In terms of overall energy consumption, the following five industry sectors accounted for 84% of all fuel used in manufacturing: chemicals, petroleum & coal products, primary metals, food and paper.

Source: U.S. Energy Information Administration, 2018 Manufacturing Energy Consumption Survey

Electric



The two primary electric service providers in the Region, by service territory size, are Ohio Edison and Firelands Electric, with AEP Ohio and Lorain – Medina Rural Electric each serving small areas in Huron County.

Additionally, the City of Huron, along with the Villages of Milan and Monroeville are public power communities with American Municipal Power.

The table below provides a comparison of electric rates for states that may often compete with Ohio for corporate investment projects.

Electricity Prices per kWh (December 2023)					
Residential		Commercial		Industrial	
KY	$0.1221	OH	$0.1053	KY	$0.0647
IN	$0.1458	PA	$0.1105	OH	$0.0696
OH	$0.1569	KY	$0.1165	PA	$0.0768
PA	$0.1753	IN	$0.1257	IN	$0.0790
MI	$0.1855	MI	$0.1318	MI	$0.0838

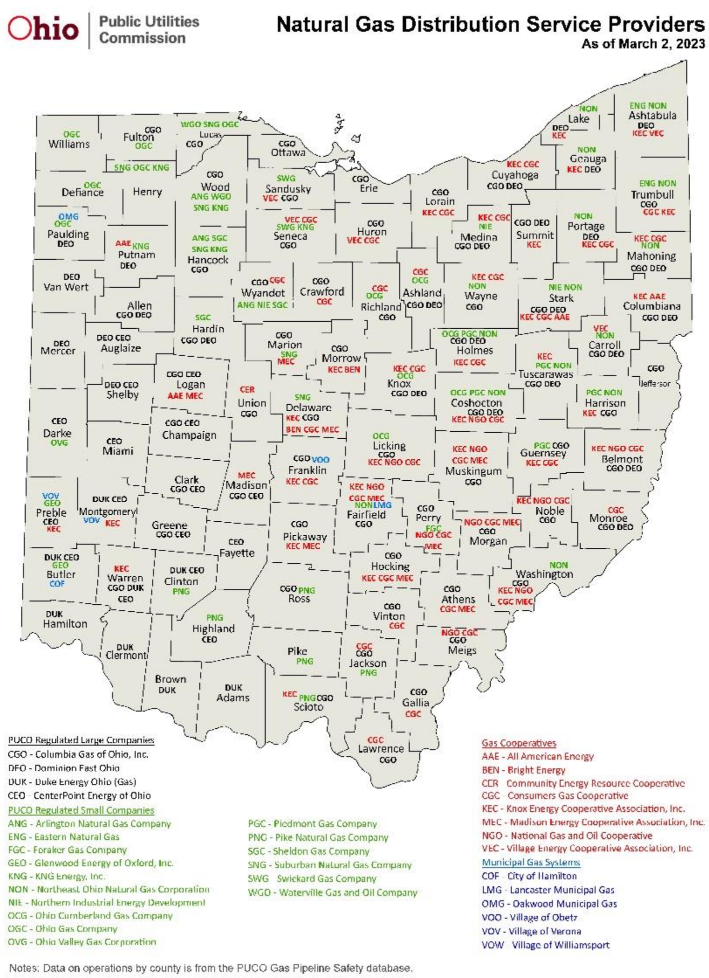
Source: U.S. Energy Information Administration

NATURAL GAS

The table below provides a comparison of natural gas prices for selected midwestern states that may often compete with Ohio for corporate investment projects.

Natural Gas Prices per CCF (November 2023)					
Residential		Commercial		Industrial	
IN	$9.86	OH	$6.94	KY	$4.33
MI	$10.20	IN	$7.24	IN	$5.43
OH	$11.63	MI	$9.00	MI	$7.90
KY	$11.63	PA	$9.44	OH	$8.37
PA	$12.29	KY	$9.71	PA	$9.26

Source: U.S. Energy Information Administration



Columbia Gas of Ohio is the natural gas distribution service provider for Erie County, while Huron County also includes service from Consumers Gas Cooperative and Village Energy Cooperative Association, in addition to Columbia Gas.

Source: Public Utilities Commission of Ohio

Water & Sewer

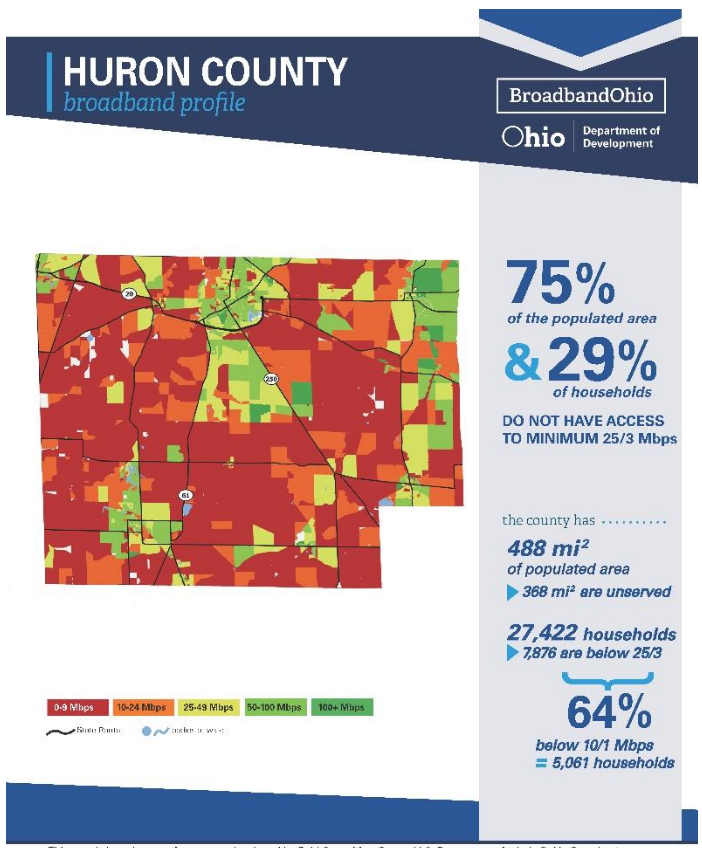
Similar to large consumers of electricity and natural gas, the U.S. Environmental Protection Agency identifies industry sectors that consume large quantities of water and produce large quantities of wastewater. These industries include food and beverage manufacturing, chemical manufacturing, paper manufacturing, primary metals and electric power generation.

The availability of excess water has not been a limiting factor for attracting new development projects in the Region; however, the lack of sanitary sewer infrastructure in lesser developed/more rural areas within the Region has been an obstacle, as this adds both time and cost to new projects.

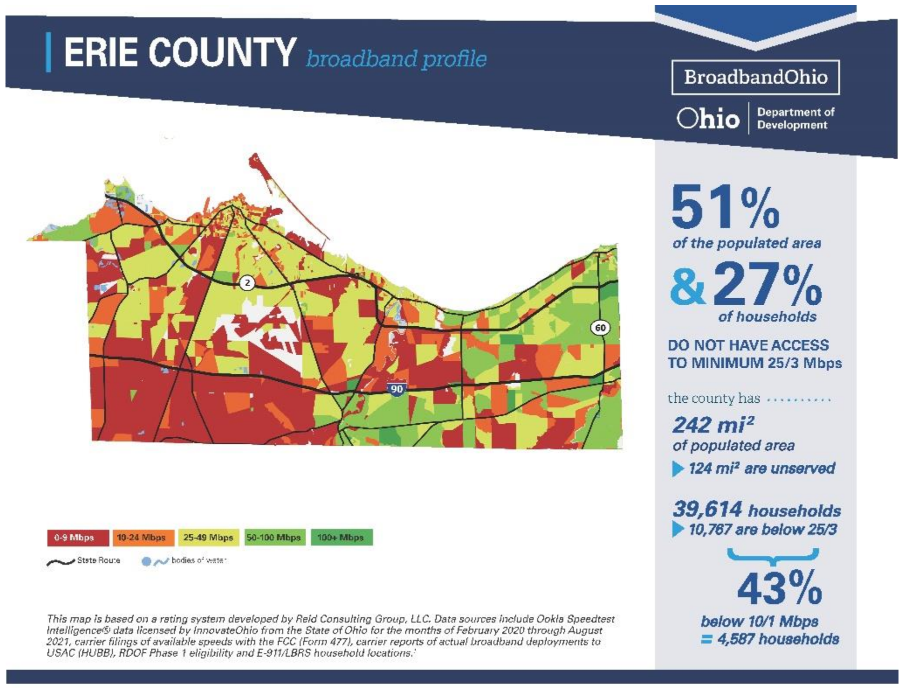
Telecommunications & Data

The necessity of remote work during the pandemic magnified the importance of strong and reliable internet service. While site selection consultants only ranked "ICT/broadband" as the 27th most important site selection factor, corporate executives ranked it as the 5th most important factor in the 2023 Area Development survey.

The following maps depict the broadband internet availability gaps by county.



This map is based on a rating system developed by Reid Consulting Group, LLC. Data sources include Ookla Speedtest Intelligence® data licensed by InnovateOhio from the State of Ohio for the months of February 2020 through August 2021, carrier filings of available speeds with the FCC (Form 477), carrier reports of actual broadband deployments to USAC (HUBB), RDOF Phase 1 eligibility and E-911/LBRS household locations.



Utilities Infrastructure SWOT and Recommendations

Erie & Huron: Utilities

Strengths

- Available water capacity
- Ohio is competitive vs. neighboring states for electric and natural gas rates

Weaknesses

- Lack of sanitary sewer in rural and lesser developed areas

Opportunities

- Evaluate implementation of incentives and public finance mechanisms
- Aggressively pursue grant funding

Threats

- Increasing construction costs negatively impact affordability of utility expansion projects

Tax Climate

Taxes have an impact on the ultimate location decision for almost all competitive site selection projects. In fact, corporate tax rate was ranked as the 9th most important site selection factor in Area Development's 2023 Corporate Survey, while state/local incentives and tax exemptions were tied for 11th. Site selection consultants ranked state/local incentives as the 2nd most important site selection factor, with tax exemptions ranked 7th and corporate tax rate 26th. State and local taxes, such as real and personal property tax, sales tax, and income tax, can vary significantly between locations, as well as their relative impact on different industry sectors. Typically, during the initial phases of the location analysis, a general evaluation of a State's tax climate and incentives opportunities is prepared, as opposed to the creation of a comparative operating cost model, which usually occurs once the "short list" of sites/communities is determined.

Tax Climate

- State Tax Climate

The following section of the Analysis will include an overview of Ohio's state tax climate.

State Taxes

The table below provides data from the Tax Foundation's 2024 State Business Tax Climate Index and compares Ohio to the same set of states included previously in the Utilities section. Ohio was ranked as having the 36th best overall state business tax climate. Ohio has been ranked 37th for the previous five years.

State	Indiana	Michigan	Kentucky	Ohio	Pennsylvania
Overall Rank	10	11	18	36	31
Corporate Tax	12	20	15	39	41
Individual Income Tax	16	12	18	40	23
Sales Tax	18	12	13	36	16
Property Tax	3	26	23	5	14
Unemployment Insurance Tax	25	7	46	12	21

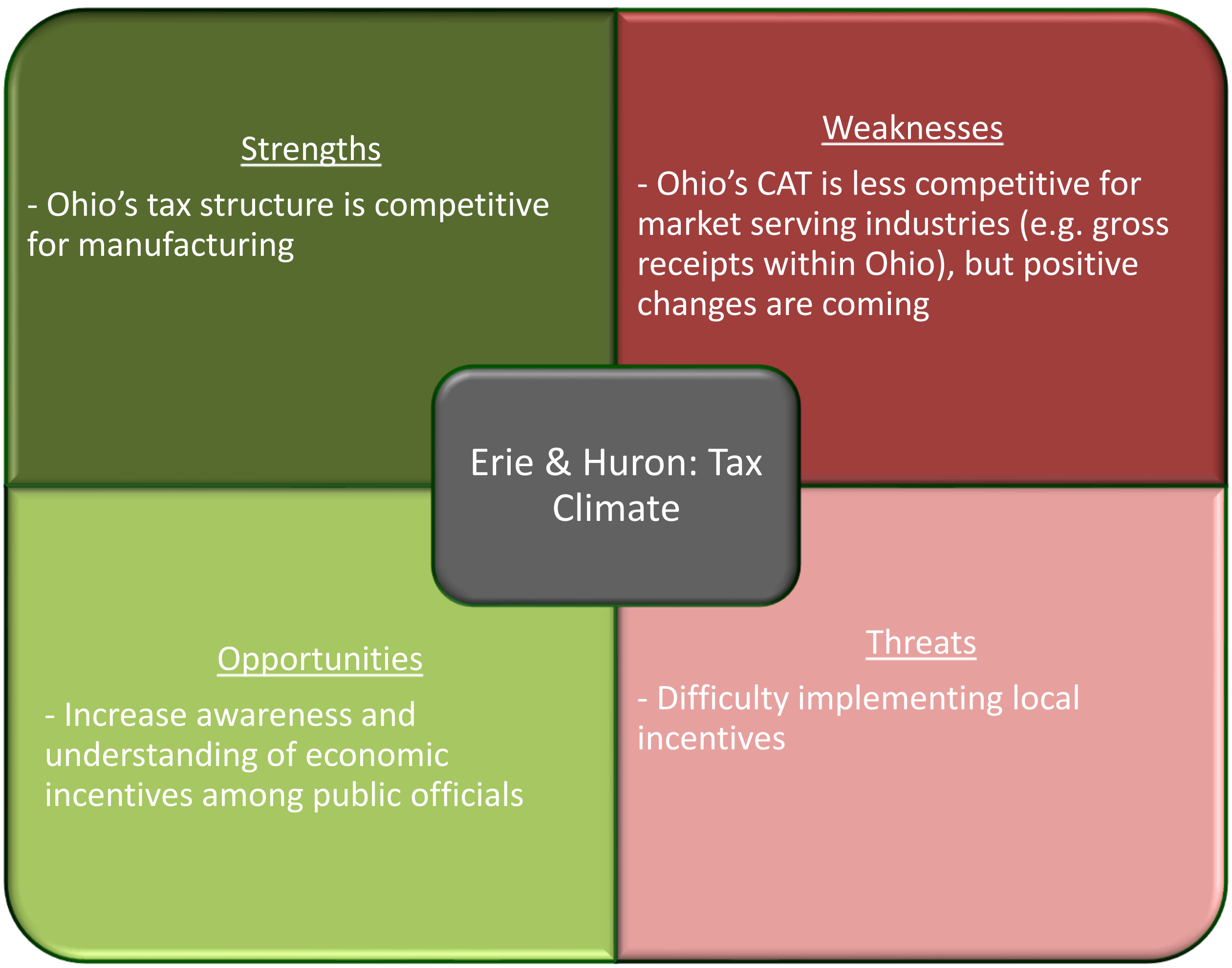
Source: https://taxfoundation.org/research/all/state/2024-state-business-tax-climate-index/

Ernst and Young's report, "Total state and local business taxes for FY21" provides a breakdown of tax collections by type. Among the midwestern comparison states, Ohio has the highest share of revenue generated by sales tax but has the 2nd lowest share of taxes collected from property, corporate income, unemployment insurance and individual income tax on business income.

State	Property	Sales	Excise	Corporate Income	Unemp. Insurance	Ind. Income Tax on Biz. Income	License & Other	Total
Kentucky	33.3%	20.4%	18.7%	11.3%	4.6%	6.8%	4.9%	100.0%
Indiana	40.5%	19.9%	12.7%	9.4%	3.8%	11.4%	2.2%	100.0%
Michigan	40.4%	22.6%	9.9%	8.3%	6.1%	5.9%	6.8%	100.0%
Ohio	35.2%	23.6%	14.9%	8.7%	4.2%	6.4%	7.0%	100.0%
Pennsylvania	36.1%	17.1%	11.8%	12.7%	6.9%	6.9%	8.5%	100.0%

Source: https://www.ey.com/en_us/tax/total-state-and-local-business-taxes-for-fy21

Tax Climate SWOT and Recommendations



Business & Economic Climate

Developing an understanding of the composition and health of the local economy, as well as determining the relative ease or difficulty of conducting business within an area, are key factors in an analysis of a community's business and economic climate. It is important to note that the perception of a community's business and economic climate versus its actual business climate may be vastly different.

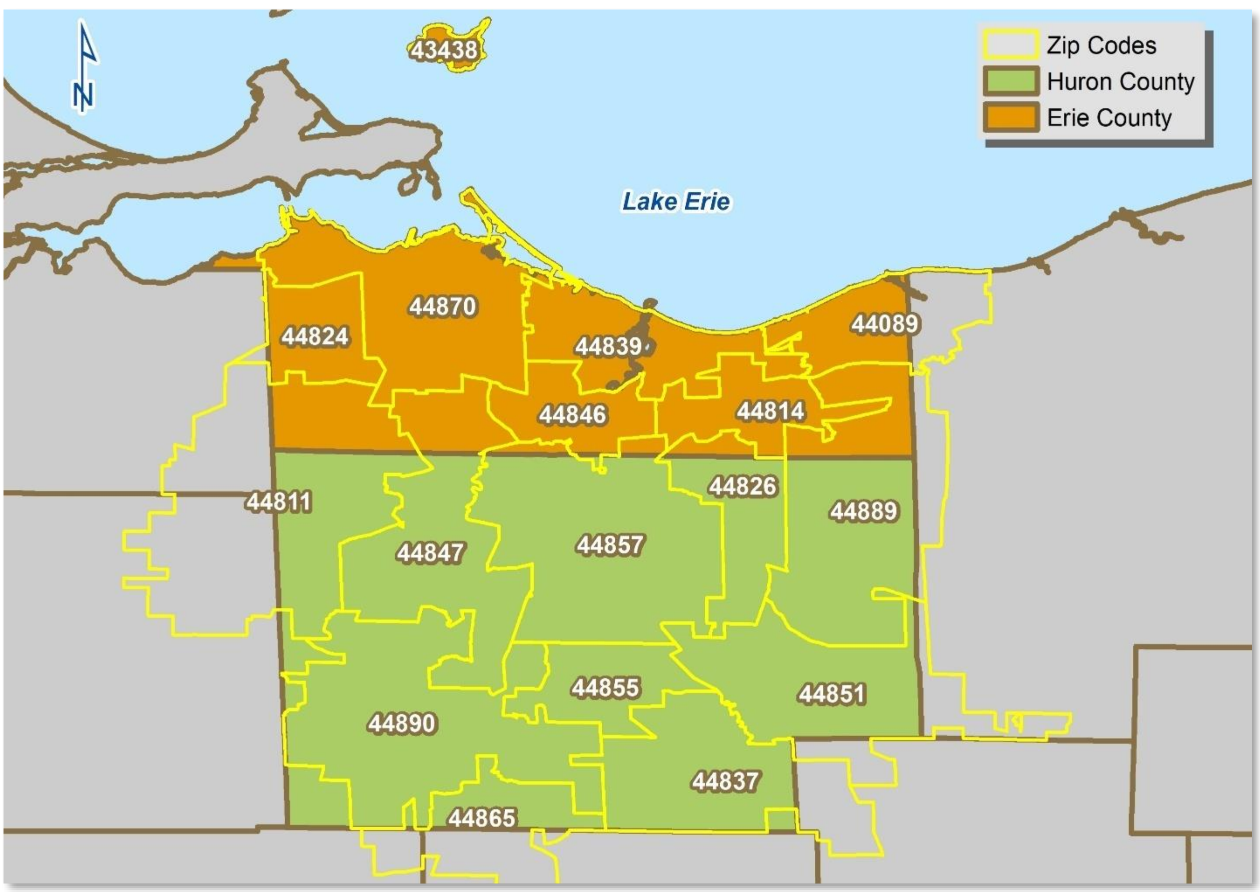
Business & Economic Climate

- Establishment Trends
- State Business Climate

The following section of the SWOT Analysis includes an evaluation of business establishment trends and state business climate.

Business Establishment Trends

The U.S. Census Bureau reports business establishment trends for counties and zip codes on an annual basis. The County/Zip Code Business Patterns datasets include the number of establishments, by industry sector and employment size range. The map below depicts the 17 zip codes that are included. Some of the zip codes included cross county boundaries.



Change in Total Business Establishments by Industry Sector (2017 – 2021)

NAICS	Industry Description	Number of Establishments		Change (2017-2021)	
		2017	2021	Number	Percent
22	Utilities	4	3	-1	-25.0%
23	Construction	293	317	24	8.2%
31-33	Manufacturing	206	205	-1	-0.5%
42	Wholesale Trade	100	108	8	8.0%
44-45	Retail Trade	498	473	-25	-5.0%
48-49	Transportation & Warehousing	73	77	4	5.5%
51	Information	45	43	-2	-4.4%
52	Finance & Insurance	191	172	-19	-9.9%
53	Real Estate, Rental & Leasing	111	112	1	0.9%
54	Professional, Scientific & Technical Services	195	181	-14	-7.2%
55	Management of Companies & Enterprises	12	6	-6	-50.0%
56	Admin., Support & Waste Mgmt. Services	113	123	10	8.8%
61	Educational Services	25	20	-5	-20.0%
62	Health Care & Social Assistance	358	346	-12	-3.4%
71	Arts, Entertainment & Recreation	80	73	-7	-8.8%
72	Accommodation & Food Services	405	400	-5	-1.2%
81	Other Services	376	378	2	0.5%
Other	Unclassified	106	99	-7	-6.6%
Total	***All Industries***	***3,187***	***3,133***	***-54***	***-1.7%***

Growth in the total number of business establishments occurred in 6 of the 17 industry sectors (highlighted in GREEN) included in the table above, with Administration, Support & Waste Management Services having the greatest percentage increase (8.8%). Construction had the most new establishments (24) during this time period.

The number of Retail Trade businesses had the greatest decrease (-25) among all industry sectors, while Management of Companies and Enterprises had the greatest percentage decrease (-50.0%).

Change in Total Business Establishments by Employment Size (2017 – 2021)

The table below summarizes the total number of business establishments, across all industry sectors, for the zip codes comprising the Region, by employment size, for 2021 and the change since 2017.

Erie + Huron Zip Codes	Total # Estabs.	1 to 4 Emps.	5 to 9 Emps.	10 to 19 Emps.	20 to 49 Emps.	50 to 99 Emps.	100 to 249 Emps.	250 to 499 Emps.	500 to 999 Emps.	1,000+ Emps.
2021	3,133	1,570	663	410	309	97	35	18	0	3
2017	3,187	1,537	750	419	294	91	45	8	0	3
# Chg.	-54	33	-87	-9	15	6	-10	10	0	0
% Chg.	-1.7%	2.2%	-11.6%	-2.2%	5.1%	6.6%	-22.2%	125.0%	N/A	0.0%

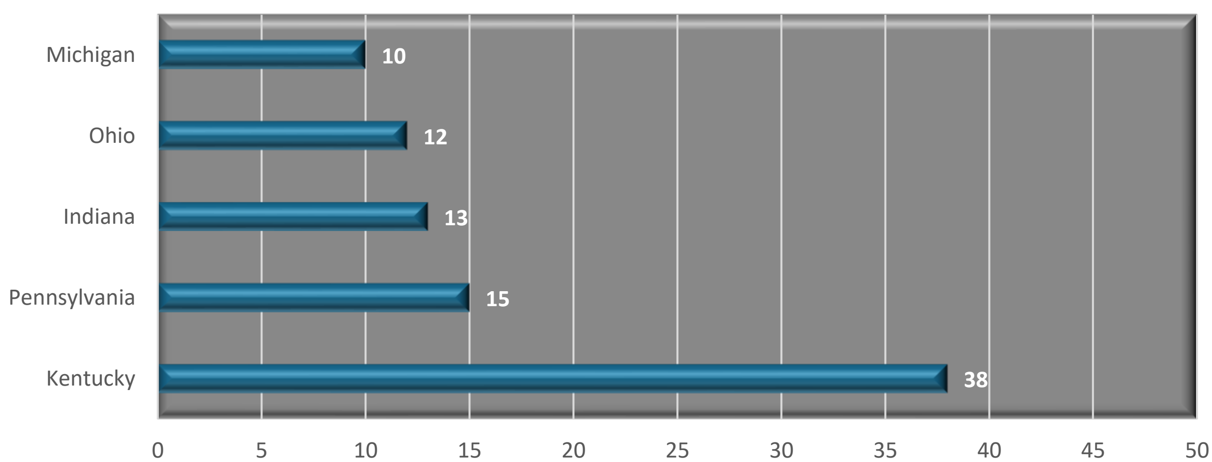
The increase in businesses with 1 to 4 employees (33), in conjunction with the decrease in businesses with 5 to 9 employees (-87) could indicate a need and/or opportunity to increase entrepreneurial support activities in the Region via facilities such as business incubators/accelerators, maker spaces and co-working spaces.

Companies in the 20 to 49 and 50 to 99 employment ranges experienced solid growth during this time period. Some notable "mid-size" companies in the Region that have experienced recent growth, include Toft Dairy, Stride Mobility, Lakeway Manufacturing, Maple City Rubber, Ploger Transportation, CW Mechanical and Norwalk Concrete.

Although the 100 to 249 employee size range decreased by 10 establishments during this time period, the 250 to 299 employee size range increased by 10 establishments.

State Business Climate

The 2023 CNBC Top States for Business rankings were used to compare Ohio to several other midwestern states that likely compete with Ohio for corporate investment projects. CNBC ranks each state in the following ten categories: workforce, infrastructure, economy, life-health-inclusion, cost of doing business, tech-innovation, business friendliness, education, access to capital and cost of living.



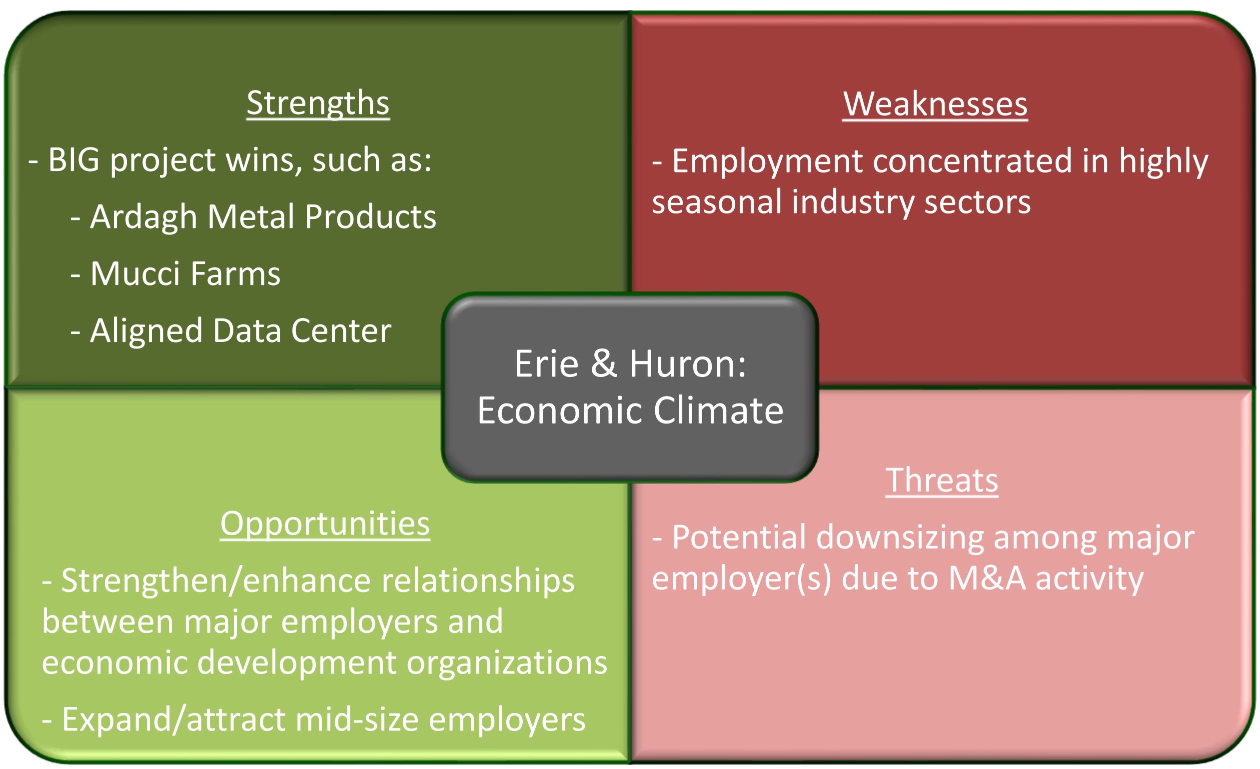
Source: https://www.cnbc.com/2023/07/11/americas-top-states-for-business-2023-the-full-rankings.html

The graph above depicts overall rankings, with Ohio ranked as having the 12th best business climate. Of the selected comparison states, only Kentucky is ranked significantly below the others, indicating the overall competitiveness of this region of the United States.

Detailed rankings by category are provided in the table below, with the best ranking for each category in GREEN and the worst ranking in RED. Of particular note, Ohio was ranked in the top 5 best in the nation for Cost of Living, Cost of Doing Business and Access to Capital.

State	Ohio	Michigan	Indiana	Kentucky	Pennsylvania
Overall Rank	12	10	13	38	15
Workforce	39	24	35	33	24
Infrastructure	6	26	5	29	17
Economy	21	29	9	25	18
Life, Health & Inclusion	23	24	44	36	27
Cost of Doing Business	4	6	5	10	24
Tech & Innovation	16	12	22	41	11
Business Friendliness	40	15	22	40	31
Education	40	36	45	36	13
Access to Capital	5	10	13	45	6
Cost of Living	3	7	3	17	16

Business & Economic Climate SWOT and Recommendations



Available Real Estate Inventory

At the end of every site selection process, the ultimate location decision is completed with some type of real estate transaction. Over the past several years, the timeline for the site selection process has become much more condensed. For many projects, this has resulted in property searches that include only existing buildings, and exclude development sites, as companies are seeking buildings that are "move-in ready." As a result of this trend, communities have been increasingly investing resources on "site certification" efforts to document that development sites are "shovel ready" in order to prevent elimination from further consideration for a project.

Real Estate

- Available Buildings
- Available Sites

For a community with a building that meets a project's search criteria, it is critical for the local economic development organization to have as much information as possible about the building readily available. The corporate site selection process is generally based on elimination and places significant emphasis on risk mitigation; therefore, lacking key information for an available building or development site greatly increases the likelihood of a community being eliminated from further consideration for a project.

For projects that are seeking a development site, generally sites that require infrastructure to be installed, require land assembly or need zoning changes are more likely to be eliminated from further consideration. Just as with existing buildings, companies typically seek "shovel ready" sites. For sites that are not immediately ready for development, it is important for the local economic development organization to identify what improvements need to be made, how long they will take, what they will cost and options for funding the necessary improvements.

The following section of the SWOT Analysis includes an overview of available properties in the Region.

Available Buildings

At the time of this report, there are a total of 80 buildings listed on the JobsOhio available real estate database. The table below provides an overview of these properties.

Listing Type	Erie County	Huron County	Total
For Sale	36	7	43
For Lease	25	12	37
Total	61	19	80

Building Type	Erie County	Huron County	Total
Industrial	6	6	12
Office	39	7	46
Retail	14	4	18
Warehouse	2	2	4
Total	61	19	80

There are only two buildings available of more than 100,000 square feet. Both buildings are industrial and located in Norwalk.

Available Sites

At the time of this report, there are a total of 62 sites listed on the JobsOhio available real estate database. The table below provides an overview of these properties.

Listing Type	Erie County	Huron County	Total
For Sale	49	10	59
For Lease	1	2	3
Total	50	12	62

Site Zoning	Erie County	Huron County	Total
Commercial	13	1	14
Industrial	6	6	12
Agricultural	3	0	3
Not Listed	28	5	33
Total	50	12	62

Erie County has seven sites of more than 50 acres, while Huron County has only one.

The 84-acre North Central Ohio Industrial Park in Norwalk is the only JobsOhio "Authenticated" site in the Region.

Real Estate SWOT and Recommendations

Erie & Huron: Real Estate Market

Strengths

- Availability of land for development (not necessarily "on the market," but meaning there is land that could be developed)

Weaknesses

- Lack of large development sites
- Lack of modern, industrial buildings

Opportunities

- Identify properties for industrial park development
- Identify partners for "spec" building development

Threats

- Cost to extend utilities to undeveloped land
- Increasing construction costs

Quality of Place

Depending on the project type (e.g., new manufacturing facility versus headquarters relocation), the relative importance of quality of place factors can vary significantly during the site selection process. Quality of place is usually much more important when employees are either being relocated, or need to be recruited, to a new community. For projects where the company's workforce needs will be largely supplied by the local population, quality of place tends to be less important since the local quality of place is already known to the existing workforce. Among younger workers, there has been a trend away from moving to a job and towards moving to a place. This trend continued to grow with the expansion of remote work opportunities following the pandemic.

Quality of Place

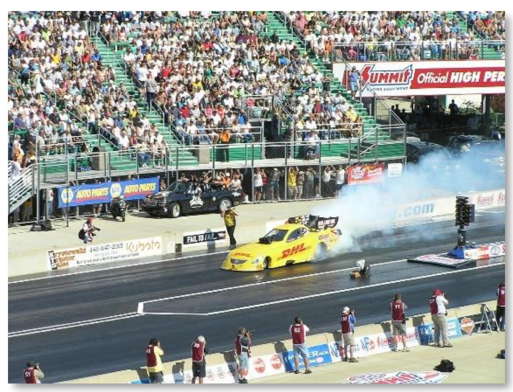
- Cultural/Recreational
- Health Care Facilities
- K-12 Education
- Cost of Living

Quality of placee is also very subjective. For example, Denver and San Diego are both generally regarded as being desirable places to live; however, some people prefer warm weather and beaches, while others prefer cool weather and mountains.

The following section of the CEDS provides an overview of cultural/recreational amenities, health care facilities, the local educational system, and cost of living in the Region.

Cultural/Recreational Amenities

The Region, and in particular Erie County, offers a truly unique mix of recreational amenities with its location along the shore of Lake Erie. Venues such as Cedar Point amusement park in Sandusky and Summit Motorsports Park in Norwalk attract tourists and local residents.



Heritage tourism sites such as the Thomas Edison birthplace in Milan and cultural amenities such as the Firelands Symphony Orchestra in Huron are just a few examples of the Region's Quality of Place Assets.

Health Care Facilities

Local medical facilities in the Region include Firelands Regional Medical Center in Sandusky and Fisher Titus Medical Center in Norwalk. U.S. News & World Report named Firelands Regional Medical Center as a "high performing" hospital for heart attacks in the publication's Best Hospitals list for 2023-24.

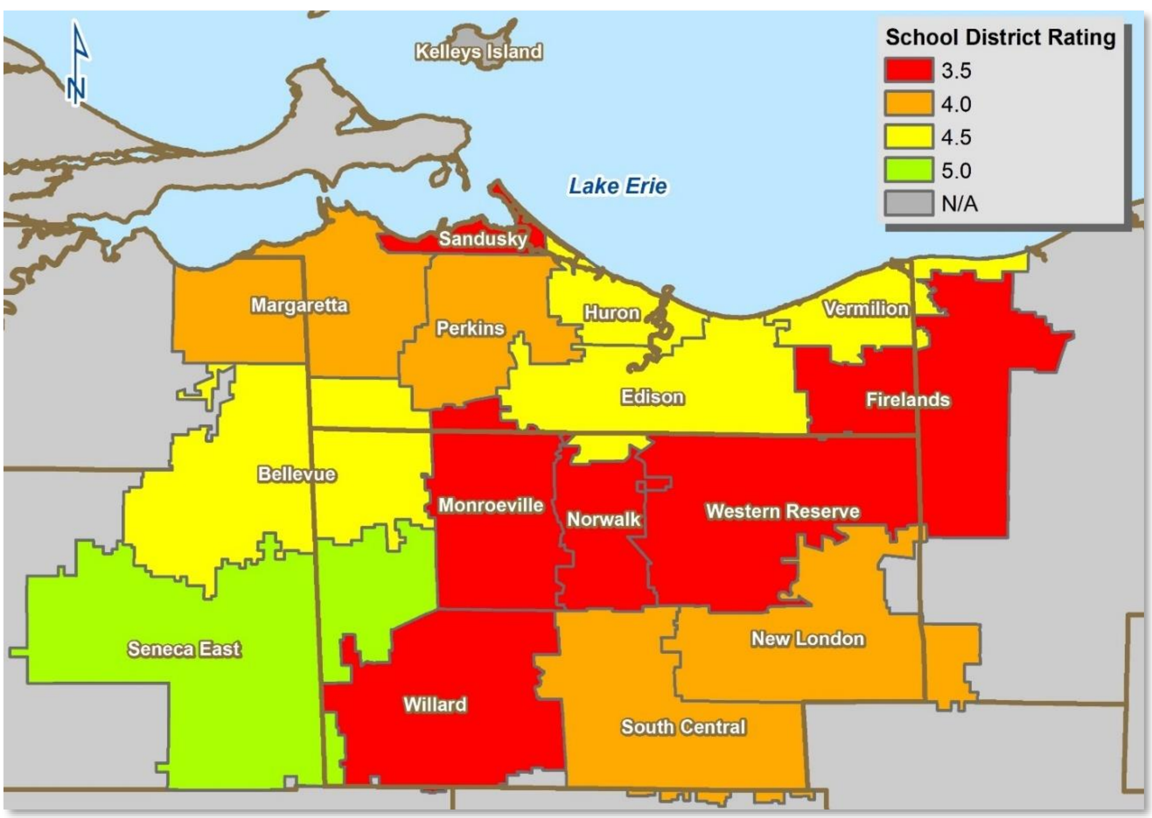
However, the two article links below highlight some of the challenges that smaller and/or rural health care facilities are faced with in terms of layoffs and elimination of programs.

- https://sanduskyregister.com/news/513779/fisher-titus-confirms-layoffs/
- https://sanduskyregister.com/news/428338/open-heart-surgery-program-ending/

Northern Ohio Medical Specialists ("NOMS Healthcare") is headquartered in Sandusky and has several locations in the Region.

K-12 Educational System

There are 16 school districts located either completely within or have a significant portion of the district located within the Region; however, district report card data are not available for the Kelleys Island Local School District. K-12 enrollment at these 15 school districts for the 2022-23 academic year totaled 21,417 students.

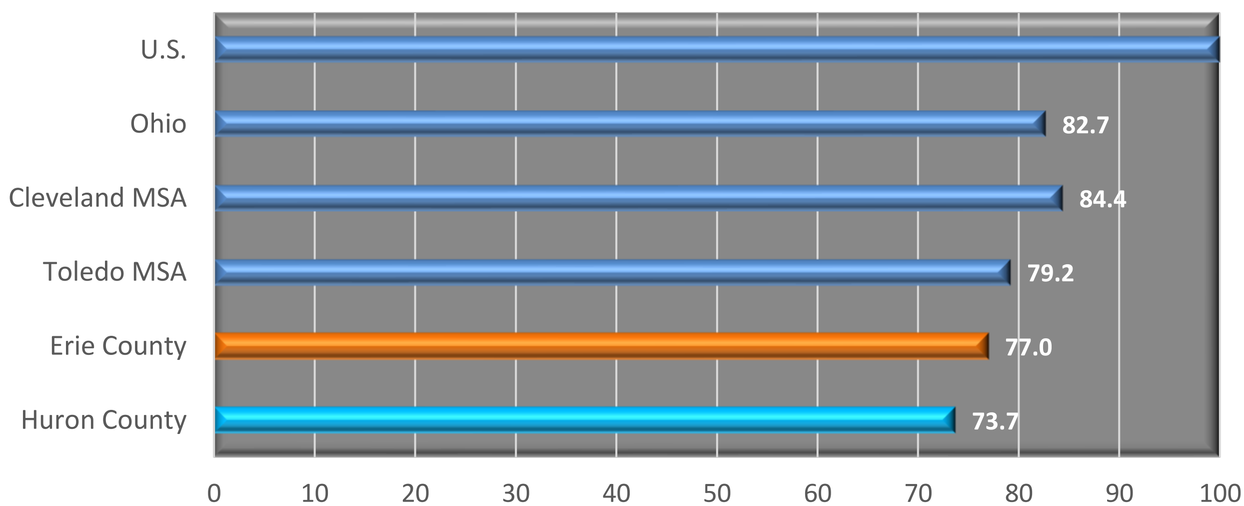


The Ohio Department of Education rates school districts on a scale from 1 to 5, with 5 being the best rating. Of the 15 school districts for which ratings are available, 9 are rated as a 4.0 (exceeds state standards) or higher, with the remaining 6 at a rating of 3.5 (meets state standards).

Source: Ohio Department of Education (2023)

Cost of Living

The cost of living index used in the graph below is calculated as a weighted average of the following components: housing (30%), food (15%), transportation (10%), utilities (6%), health care (7%) and miscellaneous (32%).



Huron County's composite cost of living index score of 73.7 means that, relative to the U.S. average (100.0), Huron County is 26.3% less expensive. Erie County's cost of living is 23.0% less expensive than the U.S. average.

The table below provides a breakdown of the overall cost index by component. The values highlighted in GREEN represent the lowest cost of living score for each category. Relative to the comparison geographic areas included, Huron County has the lowest cost of living for housing and "miscellaneous" expenditures, while Erie County has the lowest health care and transportation costs.

Cost of Living	Huron County	Erie County	Toledo MSA	Cleveland MSA	Ohio	U.S.
Overall	**73.7**	77.0	79.2	84.4	82.7	100.0
Grocery	95.9	97.3	**92.6**	98.0	96.1	100.0
Health	82.0	**81.3**	90.2	83.6	88.7	100.0
Housing	**44.8**	56.0	50.0	63.6	61.6	100.0
Utilities	96.2	94.8	98.4	**94.4**	100.0	100.0
Transportation	71.7	**68.1**	83.9	88.8	83.9	100.0
Miscellaneous	**82.2**	102.1	104.5	110.4	89.3	100.0

Source: Sperling's Best Places

Quality of Place SWOT and Recommendations

Strengths

- Affordability
- Lake Erie
- Proximity to major cities

Weaknesses

- Limited availability of housing

Erie & Huron: Quality of Place

Opportunities

- Implement recommendations from Housing Study to promote/attract new residential development

Threats

- Aging/declining population trends continue
- Increase of properties being purchased as 2nd/vacation homes

Summary of SWOT Analysis

Based upon the preceding assessment of the eight location factor categories, a rating of either positive, neutral or negative was assigned to each. The rating is from the perspective of how the characteristics and attributes within each location factor affect the Region's ability to retain, expand or attract business investment, both in general and as applied to specific industry sectors.

Positive	Neutral	Negative
• Tax Climate • Transporation Network • Quality of Place	• Utilities • Workforce/ Labor Market • Business & Economic Climate	• Demographic Profile • Available Real Estate

Industry Cluster Analysis

Understanding the target audience is of critical importance to the Region's ongoing business retention, expansion and attraction efforts.

In most instances, communities target "traded sectors" or "export industries" exclusively. However, as the Region, and in particular Erie County, has historically been a seasonal tourist destination, retail, restaurant and hospitality sectors have benefited from the influx of visitors.

Taking these factors into account, the target industry identification process will utilize several economic indicators to arrive at a set of industries that are well positioned for Erie and Huron Counties to consider as target industry sectors.

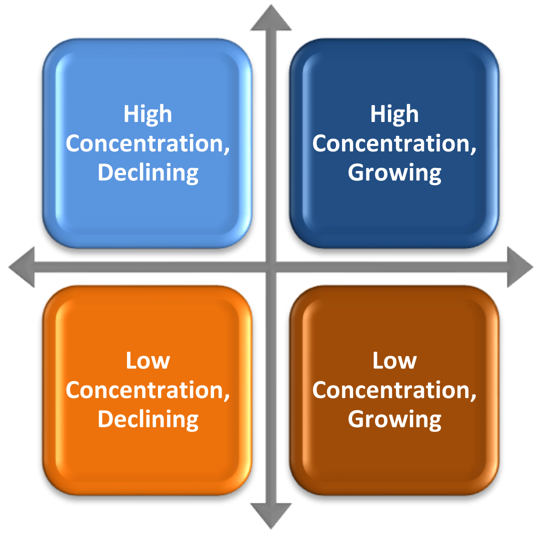
Regional Concentration – Location Quotient Analysis

A location quotient measures the relative concentration or specialization of a "local" industry sector, usually a county or group of counties, relative to some larger geographic area, typically the nation, but it could also be a state. A location quotient of less than 1.00 indicates an industry sector is less concentrated locally than nationally or statewide. A value greater than 1.00 indicates the industry is more concentrated in the region than in the nation. Industry sector employment is most commonly examined through a location quotient analysis; however, other variables, such as the number of individuals with specific educational qualifications or industry sector output can also be analyzed.

When applied to output, location quotients may provide an indication as to whether an industry sector's output is sufficient to satisfy local demand, or whether an industry sector's products are being "exported" beyond the confines of the local economy. Industry sectors with location quotients greater than 1.00 may be considered export industries. Export industries tend to be drivers of economic development as they bring in "outside" money to a local economy, and also tend to have higher employment multipliers ("ripple effect"). Industry sectors with location quotients less than 1.00 may be considered import industries. This scenario would result in products being imported to the local economy, as local production is not sufficient to meet local demand.

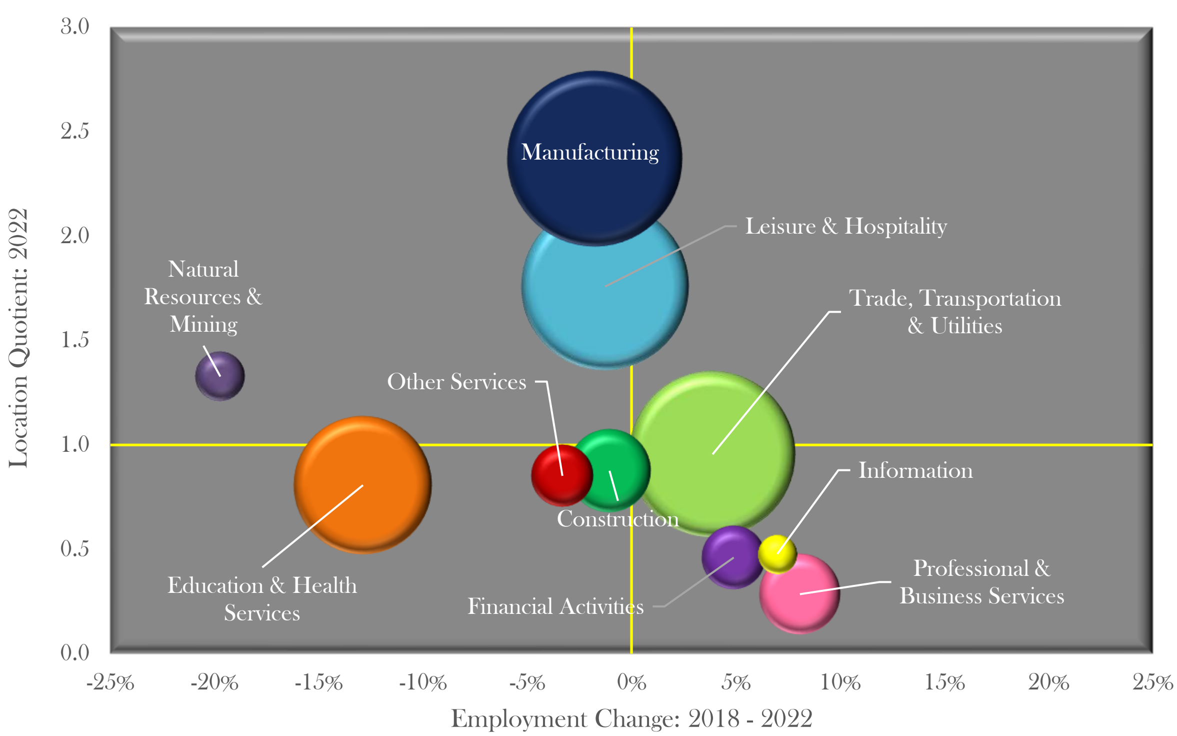
However, as with most economic analyses, a location quotient analysis does not provide absolute conclusions regarding industry sector activity between multiple geographic areas. In some instances, location quotient values are impacted more by specific local conditions, as opposed to importing or exporting of products. This is more prevalent within market-serving industry sectors, most notably retail and service sectors. Local conditions that impact an industry sector's location quotient may include certain demographic variables or proximity to specific geographic features. For example, a higher than average population of children under the age of five-years-old might yield a location quotient greater than 1.00 for day-care services, but this of course does not necessarily indicate that day-care services are being exported. Furthermore, a location quotient less than 1.00 for boat repair does not necessarily indicate that these services are being imported, but is more likely a function of a local economy's distance from a navigable body of water.

A bubble chart is commonly used to depict a location quotient analysis. The ideal location for bubbles is the upper-right quadrant, which would indicate both a regional concentration higher than the nation as well as industry growth. Bubbles in the lower-right quadrant are considered "emerging" industries. These industries have demonstrated industry growth, but are currently less concentrated within the region than the nation. The upper-left quadrant contains industries that are concentrated within the region but have contracted during the study period. Industries found in the lower-left quadrant of the bubble chart are less concentrated in the region than the nation and are experiencing negative growth.



Location Quotient Analysis: Erie + Huron Counties

The bubble chart below depicts the NAICS "supersectors" for the Region. The vertical Y-axis represents each industry's 2022 location quotient, while the horizontal X-axis represents each industry's percentage change in employment from 2018 to 2022. The size of the bubble corresponds to the overall size of each industry in terms of total employment for 2022.



The data from the bubble chart are listed in the table at right.

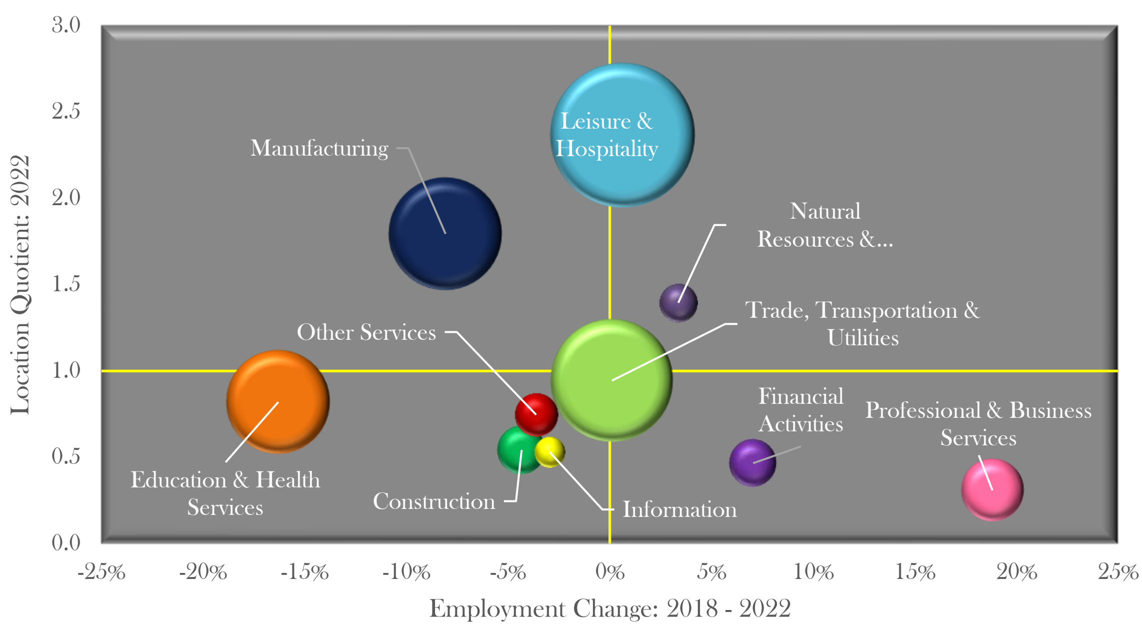
There are no industry supersectors located in the "high concentration, growing" quadrant, while the following are located in the "low concentration, growing" quadrant:

- Trade, Transportation & Utilities
- Information
- Financial Activities
- Professional & Business Services

NAICS Supersector	2022 Employment	% Change: 2018-22	2022 LQ
Total - All Industries	50,002	-2.0%	1.00
Nat. Resources & Mining	936	-19.7%	1.33
Construction	2,626	-1.1%	0.88
Manufacturing	11,750	-1.8%	2.37
Trade, Trans. & Utils.	10,550	3.9%	0.96
Information	566	7.0%	0.48
Financial Activities	1,540	4.9%	0.46
Prof. & Biz Services	2,502	8.1%	0.29
Edu. & Health Services	7,323	-12.9%	0.81
Leisure & Hospitality	10,740	-1.3%	1.76
Other Services	1,458	-3.3%	0.85

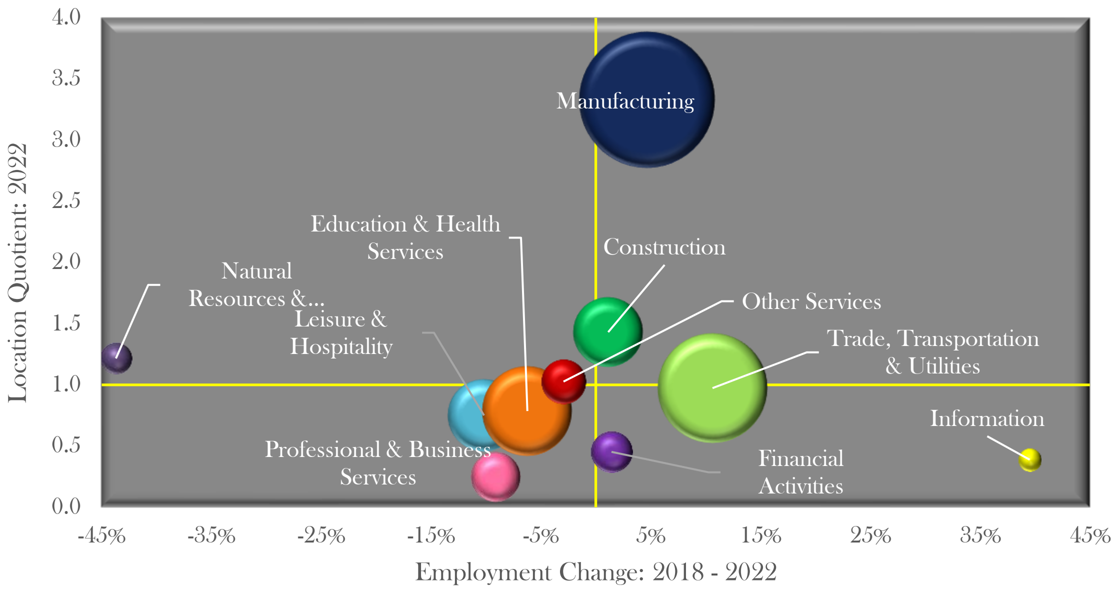
The following charts provide the location quotient analysis for Erie and Huron Counties individually.

Location Quotient Analysis: Erie County



NAICS Supersector	2022 Emp.	% Change: 2018-22	2022 US-LQ
Nat. Resources & Mining	614	3.4%	1.40
Construction	1,015	-4.3%	0.54
Manufacturing	5,553	-8.1%	1.79
Trade, Trans. & Utilities	6,512	0.1%	0.94
Information	393	-3.0%	0.53
Financial Activities	972	7.0%	0.47
Prof. & Biz Services	1,692	18.8%	0.31
Edu. & Health Services	4,645	-16.3%	0.82
Leisure & Hospitality	9,019	0.6%	2.37
Other Services	798	-3.6%	0.75

LOCATION QUOTIENT ANALYSIS: HURON COUNTY



NAICS Supersector	2022 Emp.	% Change: 2018-22	2022 US-LQ		NAICS Supersector	2022 Emp.	% Change: 2018-22	2022 US-LQ
Nat. Resources & Mining	322	-43.7%	1.22		Financial Activities	568	1.4%	0.45
Construction	1,611	1.1%	1.43		Prof. & Biz Services	810	-9.1%	0.25
Manufacturing	6,197	4.7%	3.33		Edu. & Health Services	2,678	-6.2%	0.79
Trade, Trans. & Utilities	4,038	10.6%	0.97		Leisure & Hospitality	1,721	-10.2%	0.75
Information	173	39.5%	0.39		Other Services	660	-2.9%	1.03

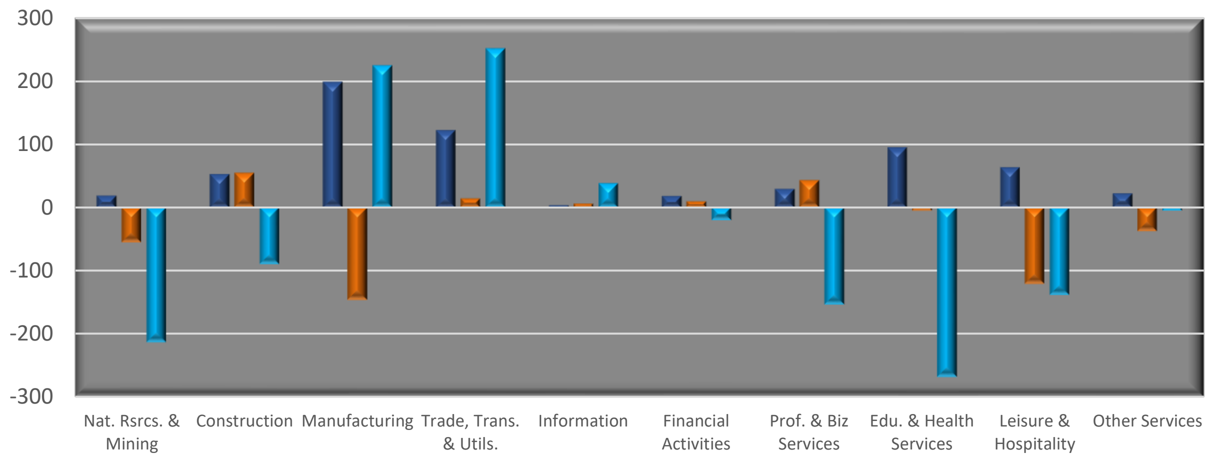
REGIONAL COMPETITIVENESS – SHIFT SHARE ANALYSIS

Shift-share analysis disaggregates the causes of regional employment change into three components: National Share (NS), Industry Mix (IM), and Regional Effect (RE). The National Share represents the change accounted for by the overall change in employment in the U.S. For example, if, during the period under consideration, the nation's total employment grew by 5%, then the national effect component of the shift-share analysis would be equal to a 5% increase.

The Industry Mix effect represents the change that is accounted for by the overall change in employment within a particular industry. For example, if the overall employment within an industry being analyzed grew by 10%, then the industry mix effect component of the shift-share analysis would be equal to 10%.

By combining these two components, we arrive at the expected change in employment within an industry in the region; however, it is rarely the case that the expected change is equal to the actual change. This difference is assumed to be attributable to the final component of the analysis, referred to as the Regional Effect. While shift-share analysis may indicate that a competitive advantage exists within a region for a given industry sector, it does not directly identify the cause(s) of any advantages or disadvantages.

Employment Change by Shift Share Component: Erie + Huron Counties



Erie + Huron Counties: US Shift Share (2018-2022)						U.S. Emp. % Chg.
Industry	NS	IM	RE	Emp. # Chg.	Emp. % Chg.	
Total - All Industries	628	0	-610	18	0.10%	3.34%
Natural Resources & Mining	19	-55	-214	-250	-43.71%	-6.34%
Construction	53	55	-90	18	1.13%	6.77%
Manufacturing	198	-146	225	277	4.68%	0.88%
Trade, Transportation & Utilities	122	14	252	388	10.63%	3.73%
Information	4	6	39	49	39.52%	8.32%
Financial Activities	19	10	-20	8	1.43%	5.08%
Professional & Business Services	30	43	-154	-81	-9.09%	8.18%
Education & Health Services	96	-5	-269	-178	-6.23%	3.17%
Leisure & Hospitality	64	-121	-138	-195	-10.18%	-2.95%
Other Services	23	-37	-5	-20	-2.94%	-2.15%

Source: U.S. Bureau of Labor Statistics, QCEW data

Industry sectors in the Region with a positive Regional Effect include Manufacturing, Trade, Transportation & Utilities and Information. Although the Regional Effect was negative for Construction and Financial Activities, these sectors did have slight increases in employment during this time period.

Regionally, Natural Resources & Mining experienced the greatest decline in employment, losing more than 250 jobs. This was followed by Leisure & Hospitality and Education & Health Services, each of which lost almost 200 jobs. Employment loss in Leisure & Hospitality was likely related to the pandemic's impact on the Region.

Nationally, Natural Resources & Mining and Leisure & Hospitality also experienced an overall decrease in employment, as did Other Services. Even national manufacturing employment grew by almost one percent during this time period, which was outpaced by the Region's manufacturing employment growth of 4.68%.

Industry Growth Projections

Every two years, the U.S. Bureau of Labor Statistics (BLS) calculates employment projections by occupation and industry, as well as for industry output. The BLS only produces industry projections at the national level. The most recently published BLS projections have 2021 as the base year, with projections for 2031.

From a business attraction perspective, sectors that are either projected to increase in terms of employment and/or productivity would be ideal targets, assuming other critical site selection factors for the given industry sector are available in the community.

Sectors projected to have productivity growth, especially in manufacturing, can make ideal targets as companies are continually striving to make more products with less people through automation and the deployment of AI.

The table below includes an analysis of the projected change in output, employment, and productivity of selected industry sectors included in BLS projections relative to that of the total projected change for the total of all industries.

Industry Sector	Projected Change 2021-2031					
	# Chg. Ind. Output	% Chg. Ind. Output	# Chg. Jobs	% Chg. Jobs	# Chg. Productivity	% Chg. Productivity
Total: All Industries	$7,802.7	22.4%	8,317.2	5.3%	$35,851.0	16.2%
Agriculture, forestry, fishing & hunting	$119.7	20.9%	15.7	0.7%	$52,528.5	20.1%
Mining	$170.2	24.2%	63.8	12.3%	$143,695.2	10.6%
Utilities	$29.4	5.7%	-34.6	-6.4%	$122,804.8	13.0%
Construction	$215.8	15.4%	204.7	2.8%	$23,243.7	12.3%
Manufacturing	$1,076.0	18.0%	-139.4	-1.1%	$93,681.6	19.3%
Wholesale trade	$524.2	25.9%	135.8	2.4%	$81,855.7	23.0%
Retail trade	$596.7	29.9%	-332.7	-2.2%	$42,477.5	32.7%
Transportation & warehousing	$332.5	27.1%	466.5	7.7%	$36,346.8	18.0%
Information	$846.2	38.8%	209.8	7.4%	$225,086.7	29.2%
Finance & insurance	$418.9	16.5%	287.3	4.4%	$45,092.3	11.6%
Real estate, rental & leasing	$452.4	21.8%	48.8	2.2%	$176,684.4	19.2%
Professional, scientific & technical services	$673.7	28.4%	1,074.8	10.9%	$37,929.4	15.8%
Management of companies & enterprises	$220.0	31.8%	68.2	2.9%	$83,070.2	28.1%
Admin., support & waste mgmt. services	$352.5	33.3%	406.4	4.5%	$32,305.7	27.5%
Education services	$47.1	15.0%	437.2	12.2%	$2,207.7	2.5%
Health care & social assistance	$894.8	38.5%	2,610.0	13.0%	$26,122.0	22.6%
Arts, entertainment & recreation	$107.8	43.1%	312.4	15.8%	$29,820.9	23.6%
Accommodation & food services	$189.2	19.3%	1,611.0	13.3%	$4,280.4	5.3%
Other services	$135.2	22.6%	527.3	8.6%	$12,589.1	12.9%

The cells that are highlighted in green indicate an industry sector's projected growth rate exceeds the average for all industries. Yellow highlighted cells indicate a positive projected growth rate, but at a slower pace than the projected rate of growth for all industries. Cells highlighted in red are projected to experience a decline in that variable.

INDUSTRY LOCATION TRENDS

The Ohio Department of Development's "Private Investment Survey" tracks economic development projects for submission to Site Selection Magazine's annual "Governor's Cup" award.

Reviewing this dataset can provide useful insights into current economic development momentum or decline. The projects listed in the table below are classified as either manufacturing (MFG), distribution/warehousing (DW), research & development (RD), agriculture (AG), call center (CC), data center (DT), headquarters (HQ), transportation (TR) or service provision (SV), and met one or more of the following criteria: Investment minimum of $1,000,000; Square footage of 20,000 or more; Job creation of 20 or more.

Year	County	Company	City	NAICS	Type	Jobs	Investment	Sq. Ft.	New or Exp.
2022	Erie	American Colors, Inc.	Sandusky	3251	MFG	22	$4,279,000	12,500	New
	Erie	American Quality Stripping, Inc.	Sandusky	3328	MFG	10	$2,420,970	96,000	Expansion
	Erie	Seven Lakeway Refractories LLC	Huron	3271	MFG	30	$9,380,000		Expansion
	Huron	Goodlevel Enterprises LLC	Norwalk	3261	MFG	6	$1,870,000		Expansion
2021	Erie	Ardagh Metal Beverage USA, Inc.	Huron	3324	MFG	211	$411,000,000		New
	Erie	Duraflow Industries, Inc.	Wakeman	3334	MFG	15	$1,000,000	5,000	Expansion
	Huron	American Excelsior	Norwalk	3261	MFG	10		60,000	New
	Huron	Tip Products, Inc.	New London	3344	MFG	14	$1,966,700	30,000	Expansion
2020	Erie	Sandusky Packaging Corp.	Sandusky	3222	MFG	3	$2,000,000		Expansion
	Huron	Specialized Technology Resources, Inc.	Bellevue	3261	MFG	51	$3,000,000	50,000	New
2019									
2018	Erie	CertainTeed Corp.	Milan	3241	MFG	10	$37,000,000		Expansion
	Huron	Mitsubishi Chem. Performance Polymers	Bellevue	3252	MFG	25	$2,000,000		Expansion
	Huron	Tenneco Inc.	Milan	5417	RD		$1,000,000		Expansion
	Huron	Wilbert Plastic Services	Bellevue	3261	MFG	88	$8,600,000		Expansion
2017	Erie	Exsurco Medical, Inc.	Florence Twp	3391	MFG	52	$20,000,000		Expansion
	Erie	Mucci Farms Ltd.	Huron	1114	AG	200	$66,000,000	272,000	New
	Erie	Thorworks Industries, Inc.	Perkins Twp	3329	MFG	20	$350,000		Expansion
	Huron	Borgers Ohio, Inc.	Norwalk	3363	MFG	80	$13,000,000	150,000	Expansion
	Huron	New Horizons Baking Company, Inc.	Norwalk	3118	MFG		$4,100,000	15,000	Expansion
	Huron	Ohio Logistics, Ltd.	Bellevue	4931	DW		$7,600,000	200,000	New
					Totals:	***847***	***$596,566,670***	***890,500***	

Recommended Target Industry Sectors

This section of the CEDS will define each NAICS sector at the two-digit level and provide evaluations and recommendations as to whether the Region should consider it as a target for business retention, expansion and attraction efforts.

Industry sectors will be rated as Primary, Secondary or Neutral in terms of their status as targets.

Primary targets should be proactively sought after, while Secondary targets should be supported, but with an understanding of the limitations impacting growth opportunities in the Region.

Neutral targets are those industry sectors where the ability of the Region to directly recruit new facilities to locate in Erie or Huron Counties may be limited for one or more reasons.

Natural Resources & Mining (NAICS 11 & 21)

Secondary

"The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats. The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries."

"The Mining, Quarrying, and Oil and Gas Extraction sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas."

Mining is not a suitable target industry for the Region; however, Natural Resources, specifically Crop Production (NAICS 111), should be considered as a Secondary target.

Utilities (NAICS 22)

Neutral

"The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage treatment and disposal."

The ability to attract energy generation facilities is limited due to factors largely beyond the Region's ability to impact, such as the location of high voltage electric transmission lines or interstate natural gas transmission lines.

Construction (NAICS 23)

"The Construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems)."

Secondary

Although Construction is in the "high concentration, growing" quadrant in Huron County's location quotient analysis, it is an industry sector that typically responds to local demand more so than "exporting" services. Therefore, supporting the growth of existing firms is important, but active recruitment of new firms should not be an area of emphasis.

Manufacturing (NAICS 31 – 33)

"The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products."

Primary

For many communities, manufacturing is the most heavily recruited industry sector. There are several reasons for this. Manufacturing jobs typically provide above average wages and often have supply chain industries that tend to locate facilities nearby producing a "ripple effect".

The Region has positive location factors that are important to the site selection process for manufacturing companies, such as access to a large, skilled workforce and excellent highway accessibility. However, manufacturing growth could be limited due to the lack of suitable real estate opportunities.

Wholesale Trade (NAICS 42)

"The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. Establishments arranging for the purchase or sale of goods owned by others or purchasing goods, generally on a commission basis are known as business-to-business electronic markets, agents and brokers, commission merchants, import/export agents and brokers, auction companies, group purchasing organizations (acting as agents), and manufacturers' representatives. ***These establishments operate from offices and generally do not own or handle the goods they sell.***"

Neutral

As with many "office" businesses, this industry sector could have a lower demand and/or need for physical office space as many of the work functions could be performed from a home office.

Retail Trade (NAICS 44 – 45)

"The Retail Trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise."

Secondary

Retail Trade is an important contributor to the local quality of place, with the U.S. 250 corridor serving as a regional retail hub, attracting consumers from neighboring communities, as well as supporting the tourism economy. Because of this, the Retail Trade sector in the Region is not just a market serving industry. Retail franchises decide to locate in communities that match their demographic criteria. Given the population trends (i.e. aging and decreasing), economic development efforts should be focused more on retention and expansion as opposed to attraction.

Transportation & Warehousing (NAICS 48 – 49)

"The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation-related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline."

Secondary

Transportation & Warehousing, and specifically the "Warehousing & Storage" subsector (NAICS 493) is projected to grow nationally in terms of output, employment and productivity. While Transportation & Warehousing developments will likely require large development sites near highway interchanges, the Region's robust railroad assets make this sector is a Secondary target.

Information (NAICS 51)

"The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data."

Secondary

Similar to the rationale for Transportation & Warehousing, Information, and in particular for the "data centers" subsector, (NAICS 518210), should be considered as a Secondary target, as it is likely that the development of additional data center facilities in the Region will require large sites near existing electric transmission infrastructure.

Also, of critical importance to the attraction of data centers is understanding the available capacity, and timeline to increase capacity, of electric service to potential development sites in the Region. With the abundance of data center activity currently in Ohio, it's important to note that new electric transmission level service capacity may take up to two years or more to come online.

Finance & Insurance (NAICS 52)

Neutral

"The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions."

The Region should consider Finance & Insurance as a Neutral target.

Although Finance & Insurance is projected to have employment growth nationally, albeit at a slower rate than overall employment growth, jobs within this sector are almost entirely "office" jobs (more susceptible to remote work), and traditional bank branches are continuing to decrease as well.

Real Estate, Rental & Leasing (NAICS 53)

Neutral

"The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case with real estate and equipment, or intangible, as is the case with patents and trademarks. This sector also includes establishments primarily engaged in managing real estate for others, selling, renting, and/or buying real estate for others, and appraising real estate."

Employment in this sector is usually in an "office" environment, with activities that are often driven by local market demand. Because of these reasons, Real Estate, Rental & Leasing should be a Neutral target for the Region.

Professional, Scientific & Technical Services (NAICS 54)

Primary

"The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services."

Among the "office" sectors (NAICS 51 – 56), Professional, Scientific & Technical Services has the greatest projected increase in employment nationally. As the industry description states, jobs in this sector require skills and training, and therefore, also provide high wages for employees. Furthermore, establishments in this sector have a broad range in terms of employment size. Accordingly, Professional, Scientific & Technical Services should be a Primary target for the Region.

Management of Companies & Enterprises (NAICS 55)

Primary

"The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise."

Commonly referred to as "headquarters," these locations are almost universally desired by communities. While the Region may not be large enough to attract a company on the Fortune 500 list, the Quality of Place and Transportation assets, which are often critical factors in the site selection process for headquarters facilities, could make it attractive for a regional or divisional HQ, or to attract a growing company on the Inc. 5000 list.

Administrative & Support and Waste Management & Remediation Services (NAICS 56)

Neutral

"The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services."

Often known as "back office" operations or firms that provide "business process outsourcing," the administrative and support component of this sector includes "call centers." Call centers have been particularly impacted by the work from home movement, even prior to the pandemic.

This sector is considered a Neutral target. Business attraction, efforts should be directed towards other "office sectors" that have a higher concentration of high skill, high wage jobs.

Educational Services (NAICS 61)

"The Educational Services sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and/or accommodation services to their students."

Secondary

Expanding the postsecondary educational opportunities in the Region is an important goal and should be strongly supported by the economic development community; however, it is not a sector that can typically be recruited. As such, Educational Services should be considered a Secondary target, with efforts aimed at retention and expansion.

Health Care & Social Assistance (NAICS 62)

Secondary

"The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The industries in this sector are arranged on a continuum starting with establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance."

The rationale of Health Care & Social Assistance being rated as Secondary is essentially the same as that of Educational Services.

Arts, Entertainment & Recreation (NAICS 71)

Primary

"The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests."

The Arts, Entertainment & Recreation sector is directly related to Quality of Place, and therefore is a Primary target.

Accommodation & Food Services (NAICS 72)

Primary

"The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment."

Accommodation & Food Services should be considered a Primary target for the same reason as Arts, Entertainment & Recreation.

Other Services (NAICS 81)

"The Other Services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services, pet care (except veterinary) services, photofinishing services, temporary parking services, and dating services."

Secondary

Although establishments in Other Services are predominantly local market serving businesses with relatively small employment totals, they are often started by local entrepreneurs, and with support for expansion being available.

Summary of Target Industry Sectors

Primary

- Manufacturing
- Information
- Professional, Scientific & Technical Services
- Management of Companies (HQs)
- Arts, Entertainment & Recreation
- Accommodation & Food Services

Secondary

- Natural Resources & Mining
- Construction
- Retail Trade
- Transportation & Warehousing
- Information
- Educational Services
- Health Care & Social Assistance
- Other Services

Neutral

- Utilities
- Wholesale Trade
- FIRE - Finance, Insurance & Real Estate
- Real Estate, Rental & Leasing
- Admin., Support & Waste Mgmt. Services

Selected Target Industry Subsector Profiles

Profiles of selected industry subsectors from primary target industry sectors are provided in the following section. The target industry subsector profiles include a description of the activities performed and relevant assets found within the Region, such as specialized facilities, industry focused organizations or businesses operating within the subsector. From a workforce development perspective, the fastest growing and most prevalent occupations for each target industry subsector are listed.

NAICS 311: Food Manufacturing

Transformation of livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products.

The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.

Growth Occupations

- Data scientists
- Information security analysts
- Software developers
- Web developers
- Industrial machinery mechanics

Most Prevalent Occupations

- Packaging and filling machine operators and tenders
- Food batchmakers
- Meat, poultry, and fish cutters and trimmers
- Laborers and freight, stock, and material movers, hand
- Bakers

Selected Industry-Specific Assets

- Available water capacity within the Region
- U.S. Location Quotient = 2.83; Ohio Location Quotient = 2.78
- Several existing companies within the Region

NAICS 3121: Beverage Manufacturing

The Beverage Manufacturing industry group includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages.

Growth Occupations

- Data scientists
- Industrial machinery mechanics
- Software developers
- Logisticians
- Occupational health and safety specialists

Most Prevalent Occupations

- Bartenders
- Packaging and filling machine operators and tenders
- Separating, filtering, clarifying, precipitating, and still machine setters, operators, and tenders
- Sales representatives, wholesale and manufacturing, except technical and scientific products
- Waiters and waitresses

Selected Industry Assets

- Several independently owned and operated wineries and breweries
- Available water capacity within the Region
- Complements tourism sector

NAICS 334: Computer & Electronic Product Manufacturing

Establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products, and establishments that manufacture components for such products. For industries in this subsector, the manufacturing processes are fundamentally different from the manufacturing processes of other machinery and equipment. The design and use of integrated circuits and the application of highly specialized miniaturization technologies are common elements in the production technologies of the Computer and Electronic Product Manufacturing subsector.

Due to the Intel project near Columbus, OH, particular emphasis should be placed on NAICS 3344 Semiconductor and Other Electronic Component Manufacturing as a target industry opportunity. This industry comprises establishments primarily engaged in manufacturing semiconductors and other components for electronic applications. Examples of products made by these establishments are capacitors, resistors, microprocessors, bare and loaded printed circuit boards, electron tubes, electronic connectors, and computer modems.

Growth Occupations (NAICS 3344)

- Statisticians
- Data scientists
- Industrial machinery mechanics
- Information security analysts
- Computer and information research scientists

Most Prevalent Occupations (NAICS 3344)

- Electrical, electronic, and electromechanical assemblers
- Semiconductor processing technicians
- Industrial engineers
- Inspectors, testers, sorters, samplers, and weighers
- Software developers

Selected Industry-Specific Assets and Rationale

- Intel supply chain/service provider opportunities
- Projected growth in employment, output and productivity
- Connections to other target industries, including automotive and aerospace

NAICS 3363: Motor Vehicle Parts Manufacturing

Establishments primarily engaged in manufacturing motor vehicle gasoline engines and engine parts, motor vehicle electrical and electronic equipment, motor vehicle steering and suspension components (except springs), motor vehicle brake systems, motor vehicle transmission and power train parts, motor vehicle seating and interior trim, motor vehicle metal stampings, and other motor vehicle parts and accessories. This industry group includes establishments that rebuild motor vehicle parts.

Most Prevalent Occupations

- Miscellaneous assemblers and fabricators
- Cutting, punching, and press machine setters, operators, and tenders, metal and plastic
- Engine and other machine assemblers
- First-line supervisors of production and operating workers
- Inspectors, testers, sorters, samplers and weighers

Growth Occupations

- Data scientists
- Industrial machinery mechanics
- Information security analysts
- Software developers
- Operations research analysts

Selected Industry-Specific Assets

- Proximity to multiple OEM facilities
- Workforce with relevant skills and experience
- Targeted sector for TeamNEO and JobsOhio

NAICS 3364: Aerospace Product & Parts Manufacturing

Establishments primarily engaged in one or more of the following: (1) manufacturing complete aircraft, missiles, or space vehicles; (2) manufacturing aerospace engines, propulsion units, auxiliary equipment, or parts; (3) developing and making prototypes of aerospace products; (4) aircraft conversion (i.e., major modifications to systems); and (5) complete aircraft or propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).

Growth Occupations

- Software developers
- Industrial engineers
- Mechanical engineers
- Logisticians
- Inspectors, testers, sorters, samplers and weighers

Most Prevalent Occupations

- Software developers
- Industrial engineers
- Inspectors, testers, sorters, samplers and weighers
- Aircraft structure, surfaces, rigging, and systems assemblers
- Aircraft mechanics and service technicians

Selected Industry-Specific Assets (Facilities, Organizations, Companies, etc.)

- NASA Armstrong
- Sierra Lobo
- Ohio Aerospace Institute

NAICS 54 & 55: HQs & Professional, Scientific, and Technical Services

These target industry sectors have been combined as they share several characteristics in terms of key site selection factors and workforce composition. Industry subsectors within Professional, Scientific and Technical Services include:

- Legal services
- Accounting, tax preparation, bookkeeping, and payroll services
- Architectural, engineering, and related services
- Specialized design services
- Computer systems design and related services
- Management, scientific, and technical consulting services
- Scientific research and development services
- Advertising and related services
- Other professional, scientific, and technical services

For Professional, Scientific and Technical Services, the most prevalent occupations were excluded as they tend to be very specific to a given industry subsector (e.g. lawyers or accountants) as opposed to being part of several industry subsectors. Therefore, the top 10 growth occupations were included.

Growth Occupations

- Data scientists
- Statisticians
- Medical and health services managers
- Software developers
- Computer and information research scientists
- Operations research analysts
- Actuaries
- Epidemiologists
- Software quality assurance analysts and testers
- Web developers

NAICS 71: Arts, Entertainment and Recreation
NAICS 72: Accommodation and Food Service

The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.

Growth Occupations (NAICS 71 & 72)

- Other personal care and service workers
- Motor vehicle operators
- Cooks and food preparation workers
- Entertainers and performers, sports and related workers
- Grounds maintenance workers

Most Prevalent Occupations (NAICS 71 & 72)

- Entertainment attendants and related workers
- Other personal care and service workers
- Food and beverage serving workers
- Cooks and food preparation workers
- Other food preparation and serving related workers

Selected Industry-Specific Assets and Rationale

- Nationally recognized attractions (e.g. Cedar Point)
- Nationally recognized natural resources (e.g. Lake Erie)
- Bowling Green State University's Sandusky campus

Workforce Development – Connecting to Target Industry Sectors

Workforce development efforts between educational institutions, public sector agencies and private sector employers should be coordinated and not solely reactive, but proactive as well. Ideally, these key stakeholder groups will work together to find a balance between educational and training efforts aimed at the most prevalent occupations (short and mid-range needs) versus those that target growth occupations (mid-range to long-term opportunities).

The following section provides detailed data for selected growth occupations within target industry sectors. Occupational data and descriptions were obtained from the U.S. Bureau of Labor Statistics Occupational Outlook Handbook.

Additional occupational data are available at: https://www.onetonline.org/.

Data Scientists: SOC 15-2051.00

Data scientists use analytical tools and techniques to extract meaningful insights from data. Typically, data scientists spend much of their time in an office setting. Data scientists need at least a bachelor's degree in mathematics, statistics, computer science, or a related field to enter the occupation. Some employers require or prefer that applicants have a master's or doctoral degree.

Data Scientists: SOC 15-2051.00	
2023 Annual Median Pay	$108,020
Typical Entry-Level Education	Bachelor's Degree
Related Work Experience	None
On-the-job Training	None
Number of Jobs, 2022	168,900
Job Outlook, 2022-32	35%
Growth Rate	Much faster than average
Employment Change, 2022-32	59,400
Annual openings	17,700

Software Developers: SOC 15-1252.00

Software developers design computer applications or programs and work in computer systems design and related services, in manufacturing, or for software publishers. They often work in offices and on teams with other software developers or quality assurance analysts and testers. Software developers typically need a bachelor's degree in computer and information technology or a related field. Some employers prefer to hire developers who have a master's degree.

Software Developers: SOC 15-1252.00	
2023 Annual Median Pay	$130,160
Typical Entry-Level Education	Bachelor's Degree
Related Work Experience	None
On-the-job Training	None
Number of Jobs, 2022	1,795,300
Job Outlook, 2022-32	25%
Growth Rate	Much faster than average
Employment Change, 2022-32	451,200
Annual openings	153,900

Information Security Analysts: SOC 15-1212.00

Information Security Analysts: SOC 15-1212.00	
2023 Annual Median Pay	$120,360
Typical Entry-Level Education	Bachelor's Degree
Related Work Experience	Less than 5 years
On-the-job Training	None
Number of Jobs, 2022	168,900
Job Outlook, 2022-32	32%
Growth Rate	Much faster than average
Employment Change, 2022-32	53,200
Annual openings	16,800

Information security analysts plan and carry out security measures to protect an organization's computer networks and systems. Most information security analysts work for computer companies, consulting firms, or business and financial companies. A bachelor's degree in a computer science field, along with related work experience is typically needed. Some employers also prefer additional professional certification.

Medical and Health Services Managers: SOC 11-9111.00

Medical and health services managers plan, direct, and coordinate the business activities of healthcare providers, and typically work in healthcare facilities, including hospitals and nursing homes, and group medical practices. Medical and health services managers typically need a bachelor's degree to enter the occupation. Prospective managers also typically need work experience in an administrative or clinical role in a hospital or other healthcare facility.

Medical & Health Service Managers: SOC 11-9111.00	
2023 Annual Median Pay	$110,680
Typical Entry-Level Education	Bachelor's Degree
Related Work Experience	Less than 5 years
On-the-job Training	None
Number of Jobs, 2022	509,500
Job Outlook, 2022-32	28%
Growth Rate	Much faster than average
Employment Change, 2022-32	144,700
Annual openings	54,700

Industrial Machinery Mechanics: SOC 49-9041.00

Industrial Machinery Mechanics: SOC 49-9041.00	
2023 Annual Median Pay	$61,170
Typical Entry-Level Education	HS Diploma or GED
Related Work Experience	None
On-the-job Training	Apprenticeship
Number of Jobs, 2022	507,900
Job Outlook, 2022-32	13%
Growth Rate	Much faster than average
Employment Change, 2022-32	64,700
Annual openings	49,100

Industrial machinery mechanics install, maintain, and repair factory equipment and other industrial machinery. Workers must follow safety precautions and use protective equipment. Most work full time in manufacturing facilities; however, they may be on call and work night or weekend shifts. Overtime is common. A high school diploma, but usually need at least a year of on-the-job training and/or an apprenticeship program.

Economic Resilience

Traditionally, the concept of economic resilience was focused on diversification of a region's economy, in order to avoid not being disproportionately reliant upon one industry sector or a few large employers. However, in the aftermath of the pandemic, economic development organizations have developed a more comprehensive approach to strengthening the economic resiliency of their respective regions. This more comprehensive approach includes steady-state and responsive initiatives.

The following provides examples of both steady-state and responsive initiatives that have been implemented in the Region.

Steady-State Initiatives

The EDA defines steady-state initiatives as those that bolster a region's ability to withstand or avoid an economic shock through a focus on actions developed to achieve long term goals.

Environmental Justice Report (2023): Prepared by the ERPC, the Environmental Justice Report ("EJR") responds to Executive Order 12898, which seeks to "identify and address disproportionately high and adverse human health or environmental effects on minority and low-income populations. The EJR utilizes GIS mapping to analyze American Community Survey in conjunction with proposed projects included in the Transportation Improvement Program to determine whether there will be an adverse impact on minority and low-income populations.

GIS-based Flood Plain Maps: The Erie County GIS Advisory Board maintains a series of GIS-based maps with the goals of effectively communicating information and improving the efficiency of public service delivery. A floodplain boundary map serves as guidance for locating new developments outside of areas that are at increased risk from flooding or other related weather incidents.

Workforce Collaborative: facilitated by the Huron County Commissioners, this monthly meeting is designed to identify and discuss short and long term challenges in the Region among key stakeholder groups that include employers, educational institutions and individuals in, or seeking to enter, the workforce.

Community Roundtable: facilitated by the Huron County Growth Partnership, this bi-monthly meeting provides a forum to share best practices and enhance leadership skills among elected officials and director/management level leaders in the public and non-profit sectors.

Responsive Initiatives

Responsive initiatives establish capabilities for economic development organizations to address the needs of their region following an economic shock.

Firelands Forward: was established in November 2019 and added its first staff February 2020. Firelands Forward is a regional workforce development entity serving Erie and Huron Counties, as well as Ottawa County. With the onset of the COVID-19 pandemic coinciding with Firelands Forward becoming an active entity, one of its first initiatives was the launch of the Frontline Worker Retention work group, which directly supports one of its core goals: address immediate and future workforce needs of the Region.

Small Business Relief Grants: Using funds received from the CARES Act, ARPA and private philanthropy, economic development organizations, including the Huron County Growth Partnership and Greater Sandusky Partnership, provided grant funding to small businesses that were negatively impacted by the COVID-19 pandemic and met eligibility criteria.

Business Response Group: the Huron County Growth Partnership and the Huron County Emergency Management Agency started the Business Response Group to help address issues that local businesses were facing as a result of the COVID-19 pandemic. The Business Response Group continues to meet twice per year, and most recently, developed contingency plans related to the potential influx of visitors arriving in the Region to view the full solar eclipse on April 8, 2024.

Broadband Focus Group: facilitated by the Huron County Commissioners, the Broadband Focus Group was established to identify areas and develop strategies to address areas in the Region where broadband internet access is limited or unavailable. This effort was a direct response to the COVID-19 pandemic, which shed light on the importance of broadband internet availability for distance learning and remote work.

Climate Resilience

With the increase in the frequency and severity of weather events, increasing the Region's resiliency against climate change can help mitigate the negative impacts of such events.

The chart below summarizes data from the U.S. Climate Vulnerability Index for the Counties. For the Ohio County rankings, scores closer to 88 indicate less vulnerability. For the National Vulnerability Percentile rankings, scores closer to 0 indicate less vulnerability.

Variable	Erie County		Huron County	
	Ohio County Ranking	National Vulnerability Percentile	Ohio County Ranking	National Vulnerability Percentile
Extreme Climate Events: Overall	83	20th	72	31st
Precipitation	10	92nd	10	92nd
Standardized Precipitation Index	7	95th	7	95th
Total Precipitation	43	86th	43	86th
Snowfall	13	85th	13	85th
Riverline Flooding	40	77th	67	55th
Temperature	56	62nd	41	66th
Cold Wave	37	77th	14	82nd
Urban Heat Island Extreme Heat Days	85	66th	51	75th
Days with Max Temp above 95° F	73	18th	73	18th
Storms	68	25th	25	53rd
Winter Weather	54	56th	58	54th
Hurricanes	31	54th	27	60th
Tornados	74	15th	35	39th
Drought	86	3rd	86	3rd
Wildfires	70	0th	57	1st

At first glance, the National Vulnerability Percentile for Precipitation, and its sub-categories, appear to indicate high levels of risk for the Region; however, when viewed in conjunction with the extremely low percentile rankings for drought and wildfires, the additional precipitation provides some explanatory context. The high precipitation and snowfall percentiles are also indicative of the fact that many areas have chronic water shortages and zero snowfall.

The Region is fortunate to be much less susceptible to many severe weather events as compared to many areas throughout the nation. In fact, while Ohio is often viewed negatively for its "winter weather," it could in fact emerge as a premier location for its natural resiliency against climate change.

Economic development organizations in the Region should continue to coordinate with local, state and national agencies that are involved with matters related to preparation for, and recovery from, weather events.

Goal 1: Foster an environment that promotes the retention, expansion and attraction of business investment.

Objective 1.1: Strategically market and leverage the Region's unique economic development assets

- Strategy 1.1.1: Develop marketing program directed at primary target industry sectors
- Strategy 1.1.2: Promote collaboration with NASA to explore partnership and development opportunities

Objective 1.2: Deliver "best in class" economic development programs and services

- Strategy 1.2.1: Identify comparable regions to benchmark performance metrics against
- Strategy 1.2.2: Actively review and monitor legislation and program opportunities

Objective 1.3: Strenghten entrepreneurial ecosystem

- Strategy 1.3.1: Evaluate feasibility of establishing a business incubator/accelerateor or maker space
- Strategy 1.3.2: Establish local mentorship network

Selected Key Partners

1. Greater Sandusky Partnership
2. Huron County Growth Partnership
3. Team NEO/JobsOhio

Evaluation Metrics

1. Number of new jobs created
2. Number of new businesses created
3. Create a comparative economic performance dashboard

Goal 2: Expand, and enhance existing, public infrastructure.

Objective 2.1: Increase inventory of "shovel ready" sites for economic development project opportunities

- Strategy 2.1.1: Create inventory of sites that are aligned with project opportunities
- Strategy 2.1.2: Proactively engage with private landowners regarding availability of land and real estate development process

Objective 2.2: Identify and prioritize infrastructure needs in "development corridors"

- Strategy 2.2.1: Engage with utility providers to determine current and projected needs
- Strategy 2.2.2: Aggressively pursue grant funding for infrastructure development projects

Objective 2.3: Explore opportunities for collaboration

- Strategy 2.3.1: Utilize port authorities to lead real estate development initiatives
- Strategy 2.3.2: Evaluate opportunities to implement publice finance tools such as JEDDs
- Strategy 2.3.3: Proactivley discuss benefits of TIFs and other abatements with school districts

Selected Key Partners

1. Erie & Huron County Commissioners
2. Municipal & Township Governments
3. Utilities & Transportation Agencies

Evaluation Metrics

1. Number of new sites available for development sites
2. Grants applied for & funds awarded
3. Number of new infrastructure projects

Goal 3: Increase the competitiveness of the Region's workforce

Objective 3.1: Increase educational attainment levels

- Strategy 3.1.1: Collaborate with educational institutions to align program offerings with in-demand employment opportunities
- Strategy 3.1.2: Monitor educational attainment outcome data

Objective 3.2: Mitigate barriers to employment

- Strategy 3.2.1: Support the expansion of public transit and other ride sharing services
- Strategy 3.2.2: Support the expansion of affordable childcare options

Objective 3.3: Identify opportunities to improve engagement with seasonal and international workforce

- Strategy 3.3.1: Host networking events to increase connectivity between employees and the community

Selected Key Partners

1. Ohio Means Jobs local offices
2. Firelands Forward
3. EHOVE and other postsecondary educational institutions

Evaluation Metrics

1. % of population with a college degree
2. Labor force participation rate
3. Average wages in key industry sectors

Goal 4: Become a "location of choice" to live, work and play.

Objective 4.1: Increase the quantity and diversity of housing options

- Strategy 4.1.1: Implement recommendations in the Bowen Housing Needs Assessment

Objective 4.2: Strive for excellence in educational institutions

- Strategy 4.2.1: Support K-12 initiatives to improve academic performace
- Strategy 4.2.2: Support extracurricular programs and activities that enrich student development

Objective 4.3: Invest in "Quality of Place" amenities

- Strategy 4.3.1: Promote revitalization of traditional downtown areas
- Strategy 4.3.2: Promote development of outdoor recreational amenities to optimize natural assets

Selected Key Partners

1. Private housing developers/builders
2. Shores & Islands Ohio
3. Chambers & Main Street organizations

Evaluation Metrics

1. Number of new housing units
2. Commercial vacancy rates in traditional downtown areas
3. Attendance at events, attractions, etc.

Goal 5: Promote awareness and understanding of economic development to stakeholder groups

Objective 5.1: Public and non-profit sectors

- Strategy 5.1.1: Develop educational outreach program for elected and appointed officials
- Strategy 5.1.2: Provide research and analysis support to local governmental entities to support decision making related to development projects

Objective 5.2: Private sector

- Strategy 5.2.1: Increase business retention and expansion visits
- Strategy 5.2.2: Disseminate information on finance and incentive program opportunities

Objective 5.3: General public

- Strategy 5.3.1: Communicate vision to broaden support for economic development efforts
- Strategy 5.3.2: Encourage individuals to investigate opporutnities to "get involved"

Selected Key Partners

1. ERPC, GSP, HCGP
2. Municipal and township associations
3. Subject matter experts (e.g. consultants, attorneys, etc.)

Evaluation Metrics

1. Number of educational meetings held
2. Number of BR&E visits conducted
3. Number of "press release" articles about economic development