



Exploration & Discovery Report

06.2022





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Introduction

The City of Hilliard engaged Boyette Strategic Advisors (Boyette) to develop a comprehensive Recovery and Economic Development Strategy. The development of this plan began as the Covid-19 pandemic was beginning to wane, allowing the country to return to a more normal economic environment. However, there are some lasting effects of the pandemic related to how we conduct business, support local economies, and maximize talent and other critical resources.

Many businesses have discovered that their workforce can be productive and effective working remotely, which has led to a significant increase in “work from home” job opportunities and, ultimately, an abundance of available office space in many cities. Communities have become much more aware of essential industry sectors and how important they are to maintaining livability, health, and security during a major disruption like a pandemic or natural disaster. Additionally, cities are also considering the resiliency of their economy to withstand those disruptions, allowing communities to continue functioning through any type of interruption in businesses’ ability to maintain the status quo.

The development of a Recovery and Economic Development Strategy for Hilliard has considered the impacts of Covid-19 on the business community, but it has also looked beyond Covid’s disruptions to new opportunities that lie ahead. This document provides an overview of the Exploration and Discovery process of the Opportunity Hilliard plan. That process informs the identification of target business sectors and the development of strategic goals to guide the City’s economic development efforts for the next five years.

The Exploration component included thorough data mining related to past performance of the Hilliard economy, how that performance may impact future outcomes, and how regional and national trends may offer direction for the City moving forward. Exploration also focused on stakeholder engagement to get an anecdotal view of Hilliard’s competitive position and the desires and ideas residents, employers, partners, educators, and City leaders have for the next five years.

All the stakeholder input and data mining have been thoroughly analyzed through the Discovery portion of the process. The findings of this analysis, combined with the stakeholder engagement component, have been used to develop realistic and implementable strategic goals and action items to address challenges and maximize assets as Hilliard works to remain competitive for economic opportunities that are to come.

Introduction

Methodology

Boyette developed a customized approach to the Hilliard economic development strategy that was designed to address four key objectives of the project, taken from the Request for Proposals issued by the City of Hilliard. Those objectives are:

- Improving the community's economic resiliency and recovery
- Expanding partnerships to improve the pipeline of talent and development of in-demand skills for our employers
- Attracting technology-based employment
- Sustainability

The process will inform a strategy that is designed to help cultivate business growth and sustain a prosperous community. It is important to note that the City of Hilliard has also been updating its comprehensive plan at the same time as the economic development strategy. That parallel track for the two required the planning process to sync up as appropriate to ensure that the economic development portion of the comprehensive plan will support recommendations in the economic development strategy.

The illustration to the right shows the four primary components of this planning effort. This document provides data and findings from the Exploration and Discovery Component, as well as the Market Analysis piece, which went beyond the initial data collection focused on who Hilliard is economically to consider specific issues such as benchmark research, economic resiliency, and workforce development assets and needs.

This data will inform the Critical Mission component, which includes developing strategic goals with associated recommendations and action items, in addition to profiles of critical data related to the identified target sectors. With that component completed, the project will be delivered, along with a separate Executive Summary document and an implementation matrix to assist with moving forward with the strategies.



Key Findings from Research



Thorough qualitative and quantitative data mining and research have been completed to ensure that this economic development strategy will strengthen Hilliard's already impressive competitive position over the next five years. What follows are key findings from that research.

Key Findings

The Exploration and Discovery process began with a high-level look at key data points comparing Hilliard to other Central Ohio suburban cities, which are often competitors of Hilliard in the economic development arena. Data mining and analytics were used related to the following topics:

- Hilliard Economic Profile
- Benchmark Research
- Office Sector Analysis
- Economic Resiliency Analysis
- Retail Market Profile
- Target Sector Analysis
- Workforce Data Analysis

Following is an overview of the Discoveries made related to each of those topics and how they will serve to shape Hilliard's approach to economic development over the next five years.

Hilliard Economic Profile

Boyette's Exploration process began by reviewing a series of high-level metrics that provide an economic base snapshot for Hilliard. The following Discoveries were made from that analysis:

- Hilliard has a balanced age breakout, with Millennials representing the largest segment of the population and the Greatest Generation the smallest.
- White Collar jobs dominate the workplace, with 80 percent of all jobs in Hilliard defined as White Collar.
- While a significant number of Hilliard residents commute out of the city for work, the daytime population is only 400 below the city's total population of 38,540.
- Nearly all the Civilian Population Age 16+ – 98 percent – are currently employed.
- Median Household Income in Hilliard is more than \$105,000, with more than half of residents having a household income of \$150,000+.
- More than half (56 percent) of city residents hold a Bachelor's Degree or above, with 65 percent having an Associate's Degree or higher.

Hilliard Economic Profile

ECONOMIC PROFILE

38,540

2022 Total
Population (Esri)

38,130

2022 Total
Daytime
Population (Esri)

40.7

Diversity Index

1,199

2022 Total
(NAICS11-99)
Businesses

17,216

2022 Total
(NAICS11-99)
Employees

98%

2022 Employed
Civilian Population
Age 16+ (Esri) (%)



8.9%

Services



10.4%

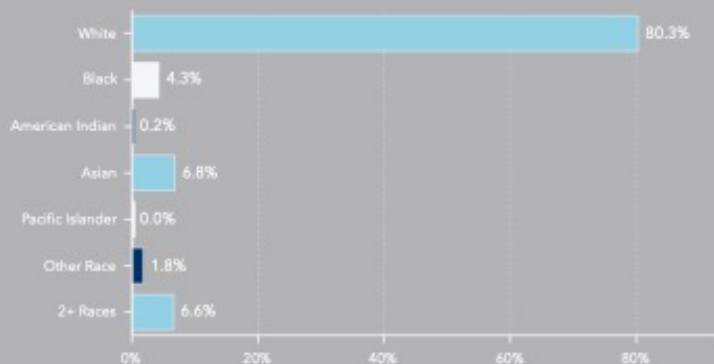
Blue Collar



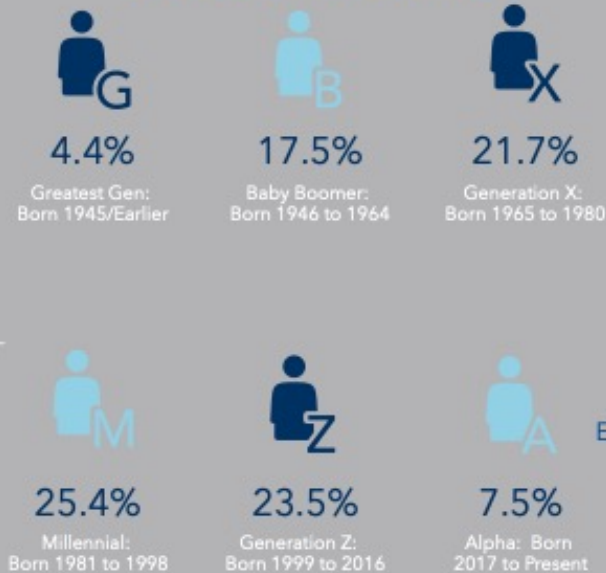
80.6%

White Collar

TOTAL POPULATION BY RACE



POPULATION BY GENERATION



INCOME



\$105,718

Median Household Income



\$52,342

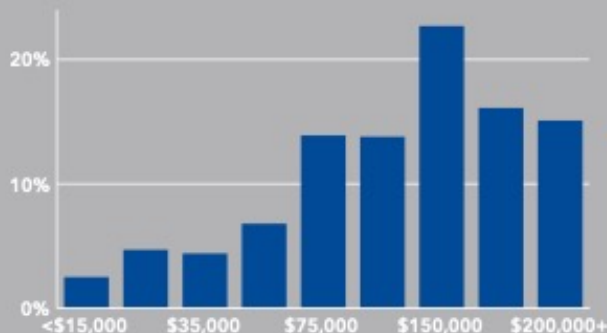
Per Capita Income



\$254,116

Median Net Worth

HOUSEHOLD INCOME



EDUCATIONAL ATTAINMENT



COMMUTE TIME: MINUTES



Benchmark Research

Benchmark research is a key element in developing an economic development strategy for any community. It allows for exploration of communities that have some similarities to Hilliard and have experienced economic success in recent years. This research process includes the following types of information:

- Population Demographics
- Housing
- Crime
- Transportation & Infrastructure
- Entrepreneurship & Innovation
- Economic Development Organization
- Major Employers
- Target Sectors
- Recent Wins
- Incentives
- Workforce

Benchmark Communities

- Carmel, Indiana
- Gilbert, Arizona
- Pflugerville, Texas
- Woodstock, Georgia

The box to the right provides a list of the communities that were used as benchmarks for the Hilliard economic development strategy. Because Intel announced a new semiconductor manufacturing facility in Central Ohio as this strategy was in development, two of the benchmark communities are adjacent suburbs to other Intel locations. Those are Gilbert, Arizona, which is in close proximity to multiple Intel facilities in Chandler, Arizona, while Pflugerville, Texas, is a growing suburb of Austin, Texas. The other two communities explored through this process were Carmel, Indiana, a smaller successful city in the Midwest, and Woodstock, Georgia, an Atlanta suburb that is very similar to Hilliard in terms of size and demographics and has a growing entrepreneurial community.

An overview of benchmark research discoveries is found on the following page.

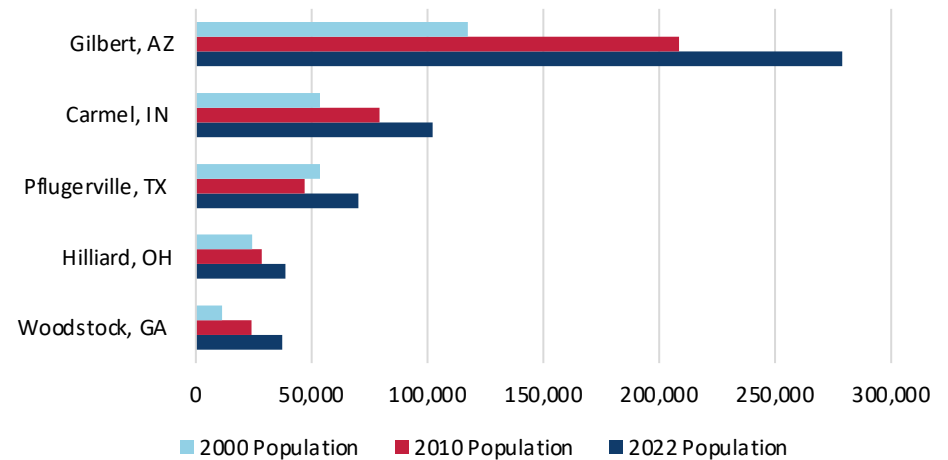
Benchmark Research

Findings

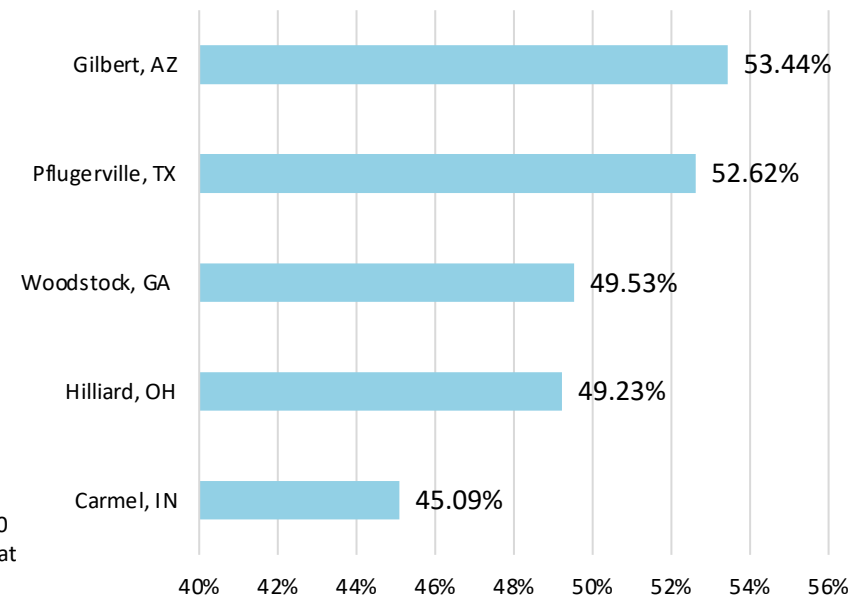
- All the benchmark cities have seen significant population growth since 2000, ranging from 232 percent in Woodstock to 31 percent in Pflugerville.
- The two Intel communities – Gilbert and Pflugerville – have the highest percentage of Millennials and GenZ residents.
- Population diversity is also much higher in the Intel communities, with Pflugerville having a Diversity Index of 75.7 and Gilbert at 57.9. All the benchmark communities and Hilliard expect to see diversity increase over the next five years.
- Carmel, Indiana, leads in educational attainment, with 76.59 percent of residents holding an Associate's Degree or higher and 71.23 percent having a Bachelor's Degree +. Hilliard ranks second in both measures at 62.99 percent Associate's Degree or above and 55.92 percent holding a Bachelor's Degree or above.
- The highest median household income is found in Carmel at \$120,175, with Woodstock, Georgia, having the lowest at \$77,192. Hilliard's income measures are strong against the benchmarks, with the second-highest per capita and average household incomes and third-highest median household income.

Note: The Diversity Index is published by Business Analytics Online and uses a single number from 0 to 100 to capture the racial and ethnic diversity of a geographic area. It represents the likelihood that two persons, chosen at random from the same area belong to different races or ethnic groups.

Benchmark Population Growth



Gen Z/Millennial Population

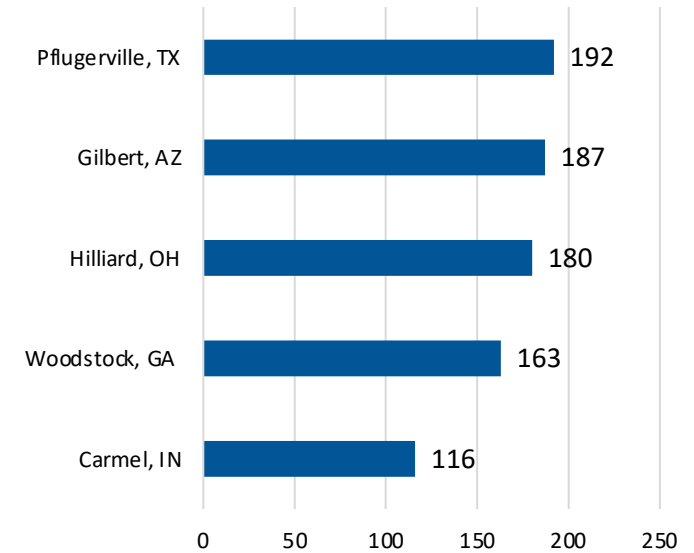


Benchmark Research

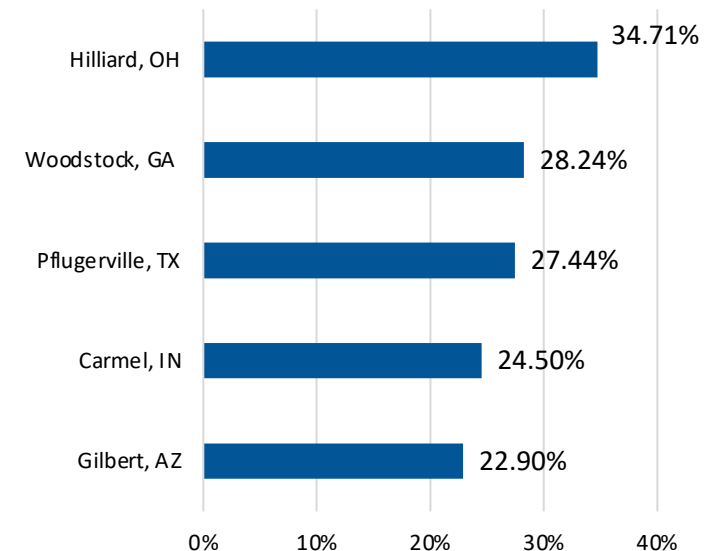
Findings

- Hilliard falls in the middle of the benchmarks in terms of housing affordability, with the Housing Affordability Index ranking Pflugerville, Texas, as most affordable with an index of 192, while Hilliard reports an index of 180.
- The average home value in Hilliard is lower than all other benchmarks except Pflugerville, Texas, with Hilliard's average at \$281,068 compared to \$266,473 in Pflugerville.
- Only 1.58 percent of housing in Hilliard is currently vacant, which is significantly lower than Carmel, Indiana, which has the highest vacancy rate of 6.03 percent. Hilliard also has the highest percentage of homes that are renter occupied.
- All the benchmark communities have low poverty rates and low Crime Index values, with poverty ranging from 3.69 percent in Carmel to 7.48 percent in Woodstock. Hilliard has the lowest Crime Index at 44, with Woodstock having the highest at 69.
- All the benchmark communities include Manufacturing or Advanced Manufacturing among their target sectors, with all also targeting Business or Professional Services.
- Finance and Insurance is listed as a target for both Carmel and Gilbert, while Woodstock includes Film and Media among its target sectors.
- While all benchmarks have some kind of entrepreneurial support system, Woodstock has the most expansive and unique entrepreneurial assets, including The Circuit, its physical co-working and entrepreneurial space.
- Because all the benchmark communities are in close proximity to a much larger city, the post-secondary education assets are significant. Additionally, some benchmarks participate in a regional workforce organization designed to maximize their workforce assets and ensure they are aligned with talent demands of the target sectors.

2021 Housing Affordability Index



Renter Occupied Housing Units



Note: The Housing Affordability Index is published by Business Analytics Online and measures the financial ability of a typical household to purchase an existing home in an area. An HAI of 100 represents an area where median household income is sufficient to afford a home valued at the median home price. An index greater than 100 suggests homes are affordable, while an index less than 100 indicates homes are less affordable.

Office Sector Analysis

With more than 80 percent of Hilliard's jobs considered White Collar, the health of the overall office sector is a critical consideration in any economic development strategy. The primary two-digit NAICS office sectors in Hilliard include Information; Finance and Insurance; Professional, Scientific, and Technical Services; and Administrative and Support and Waste Management and Remediation Services.

Below is additional detail about the current office sector in Hilliard, including both historic and projected trends at the two-digit and four-digit NAICS level.

Historic Trends – 2-Digit NAICS

- While data shows no jobs in NAICS 55 – Management of Companies and Enterprises – there are companies that have a headquarters function in Hilliard but are reporting in another NAICS code related to their primary product or services
- The greatest historic growth has occurred in NAICS 52 – Finance and Insurance. The Information sector has also seen limited growth in the past five years.
- There is a potential opportunity for industries that have spillover between Information and Finance and Insurance, such as Fintech and InsureTech companies.
- NAICS 54 – Professional, Scientific and Technical Services and NAICS 56 – Administrative and Support Services both experienced declines in the past five years, with Professional, Scientific, and Technical Services declining by 2 percent and Administrative and Support and Waste Management and Remediation Services dropping by 7 percent.

NAICS	Description	2017 Jobs	2021 Jobs	2017 – 2021 % Change	2020 Location Quotient
51	Information	146	150	3%	0.30
52	Finance and Insurance	2,936	3,304	13%	2.72
54	Professional, Scientific, and Technical Services	1,145	1,067	(7%)	0.60
55	Management of Companies and Enterprises	0	0	0%	0.00
56	Administrative and Support and Waste Management and Remediation Services	1,577	1,538	(2%)	0.94
		5,803	6,060	4%	

Office Sector Analysis

Historic Trends – 4-Digit NAICS

- The 10 largest sectors based on employment in 2021 are listed below.
- Agencies, Brokerages, and Other Insurance-Related Activities made up the greatest historic growth, with a 31 percent increase in employment.
- Non-depository Credit Intermediation (23 percent), Depository Credit Intermediation (15 percent), and Investigation and Security Services (11 percent) were the next highest-growth sectors.
- Significant decline of 10 percent has been experienced in the Insurance Carriers, Office Administrative Services, and Computer Systems Design and Related Services sectors during the last five years.

NAICS	Description	2017 Jobs	2021 Jobs	2017 – 2021 % Change	2020 Location Quotient
5242	Agencies, Brokerages, and Other Insurance-Related Activities	901	1,183	31%	4.06
5241	Insurance Carriers	1,131	1,015	(10%)	4.21
5222	Non-depository Credit Intermediation	697	860	23%	7.60
5611	Office Administrative Services	583	522	(10%)	5.31
5415	Computer Systems Design and Related Services	564	509	(10%)	1.22
5617	Services to Buildings and Dwellings	326	321	(2%)	0.81
5221	Depository Credit Intermediation	197	226	15%	0.70
5616	Investigation and Security Services	160	177	11%	1.04
5619	Other Support Services	183	176	(4%)	3.30
5416	Management, Scientific, and Technical Consulting Services	135	141	4%	0.48

Esmi, Class of Worker 2021.4

Office Sector Analysis

Projected Trends – 2-Digit NAICS

- As referenced previously, because no jobs are reported in the Management of Companies and Enterprises sector, there is no projected growth.
- Growth is projected for the Information, Finance and Insurance, and Administrative and Support and Waste Management and Remediation Services sectors.
- The Professional, Scientific, and Technical Services sector is expected to decline very slightly over the next five years.
- An overall growth rate of 3 percent is expected in the overall office sector, which represents approximately 150 jobs.

NAICS	Description	2022 Jobs	2026 Jobs	2022 – 2026 % Change	2020 Location Quotient
51	Information	154	160	4%	0.30
52	Finance and Insurance	3,367	3,484	3%	2.72
54	Professional, Scientific, and Technical Services	1,064	1,054	(1%)	0.60
55	Management of Companies and Enterprises	0	0	0%	0.00
56	Administrative and Support and Waste Management and Remediation Services	1,555	1,595	3%	0.94
		6,139	6,293	3%	

Esmi, Class of Worker 2021.4

Office Sector Analysis

Projected Trends – 4-Digit NAICS

- Below are the top 10 four-digit office sectors based on employment in 2022.
- Agencies, Brokerages and Other Insurance-Related Activities (8 percent); Investigation and Security Services (12 percent); and Management, Scientific, and Technical Consulting Services (14 percent) are projected to have the most significant increases in employment in the next five years.
- Non-depository Credit Intermediation and Office Administrative Services are also projected to grow, and those sectors have high location quotients of 7.6 and 5.31, respectively.

NAICS	Description	2022 Jobs	2026 Jobs	2022 – 2026 % Change	2020 Location Quotient
5242	Agencies, Brokerages, and Other Insurance-Related Activities	1,232	1,335	8%	4.06
5241	Insurance Carriers	1,002	969	(3%)	4.21
5222	Nondepository Credit Intermediation	879	920	5%	7.60
5611	Office Administrative Services	527	542	3%	5.31
5415	Computer Systems Design and Related Services	502	488	(3%)	1.22
5617	Services to Buildings and Dwellings	318	310	(2%)	0.81
5221	Depository Credit Intermediation	228	229	1%	0.70
5616	Investigation and Security Services	185	206	12%	1.04
5619	Other Support Services	177	171	(4%)	3.30
5416	Management, Scientific, and Technical Consulting Services	147	168	14%	0.48

Esmi, Class of Worker 2021.4

Economic Resiliency

The Covid-19 pandemic resulted in major economic disruptions around the world. As the economy began a slow return to normal, communities, regions, states, and nations all began to consider how to fare better in the next economic disruption, which may result in job loss, changes in how and where people work, need for support of the “essential” sectors, and generally how to better meet the needs of businesses and residents for the duration of the disruption.

The Exploration phase of research for the Hilliard economic development plan included a review of several types of data to discover and better understand what happened to the city’s economy during Covid-19 and what assets or challenges the city has in the event of another disruption. The process began with simply reviewing the overall sector diversity of the city’s economic base. Additionally, while this tool is not available at the city level, the *Chumura Economics & Analytics Covid Vulnerability Index* was also reviewed for Franklin County. This index is designed to measure the negative impact the Covid-19 pandemic had on employment based on the county’s mix of industries.

After that, additional data reviewed Hilliard’s employment base at a high level using a breakout of Essential and Non-Essential sectors as defined by the U.S. Cybersecurity and Infrastructure Security Agency. The next step was considering the likelihood of automation among key Hilliard occupations and how that might impact the city’s economic resiliency. *Lightcast’s Automation Index* was used to determine the occupations with the highest likelihood of automation.

Economic Resiliency

Sector Diversity

Following are key discoveries related to employment by major sector:

- The Columbus region economy is highly diversified, with no industry representing more than 18 percent of employment.
- Hilliard's largest segment based on employment is Government at 14.6 percent of total jobs, followed by Manufacturing at 12.4 percent and Finance and Insurance at 11.6 percent. A total of 10 two-digit NAICS sectors represent at least 5 percent of the jobs in Hilliard, indicating strong sector diversity.
- This is the primary consideration for the Franklin County *Covid Vulnerability Index*, which is at 91.08, indicating that Franklin County has a lower likelihood of Covid-related job loss than the U.S. as a whole.

Covid Vulnerability Index

91.08

Franklin County

Largest Sectors as % of Total Employment

Description	Hilliard Census Tracts Group
Government	14.58%
Manufacturing	12.44%
Finance and Insurance	11.55%
Healthcare and Social Assistance	8.37%
Retail Trade	8.24%
Wholesale Trade	6.92%
Construction	6.48%
Accommodation and Food Services	6.04%
Administrative and Support and Waste Management and Remediation Services	5.76%
Other Services (except Public Administration)	5.57%

Lightcast, Class of Worker 2022.2

Economic Resiliency

Essential Jobs

Following is a summary of findings related to Essential vs. Non-Essential sectors:

- The Hilliard employment base has approximately 16,000 jobs in Non-Essential sectors, compared with 14,000 jobs that are considered Essential. With more than half of jobs currently found in Non-Essential sectors, it will be important to monitor those sectors closely and anticipate needs of those employers before any other economic disruption.
- Insurance carriers and local government are the largest Essential sectors, with each having more than 2,200 jobs in Hilliard.
- Hilliard's largest segment based on employment is Government at 14.6 percent of total jobs, followed by Manufacturing at 12.4 percent and Finance and Insurance at 11.6 percent. A total of 10 two-digit NAICS sectors represent at least 5 percent of the jobs in Hilliard, indicating strong sector diversity

Employment in Essential Sectors			
Description	Hilliard Census Tracts	Franklin County, OH	Columbus, OH
Insurance Carriers & Related Activities	2,251	53,657	85,523
Local Government	2,202	24,185	30,755
Chemical Manufacturing	1,151	27,850	33,408
Credit Intermediation and Related Activities	1,124	21,953	25,932
State Government	1,073	70,998	76,463
Federal Government	1,020	17,068	20,451
Merchant Wholesalers, Nondurable Goods	858	4,116	7,753
Telecommunications	1,289	3,998	4,359
Couriers and Messengers	1,233	11,381	12,706
Merchant Wholesalers, Nondurable Goods	937	8,534	10,713

Employment in Non-Essential Sectors			
Description	Hilliard Census Tracts	Franklin County, OH	Columbus, OH
Food Services and Drinking Places	1,719	50,732	77,929
Administrative and Support Services	1,537	53,854	70,725
Ambulatory Healthcare Services	1,497	52,360	66,330
Professional, Scientific, and Technical Services	1,220	54,597	71,927
Merchant Wholesalers, Durable Goods	1,105	18,355	22,911
Fabricated Metal Product Manufacturing	1,064	4,168	7,788
Heavy and Civil Engineering Construction	904	4,352	6,484
Specialty Trade Contractors	822	23,458	36,696
Personal and Laundry Services	597	10,179	14,153
Support Activities for Transportation	574	5,000	5,877

Economic Resiliency

Automation Risk

With new technologies released every day, a number of occupations are at risk of being replaced by automation. Following are findings related to occupations that are vulnerable to automation in Hilliard:

- Laborers and Freight, Stock, and Material Movers, Hand is the sector with the most jobs and an Automation Index greater than 100 in Hilliard. A total of 735 jobs fall in that occupation, which is trending downward slightly over the next five years.
- The highest wage occupation on the automation risk list is Heavy and Tractor-Trailer Truck Drivers, with an average wage of \$24.04/hour, followed closely by Construction Laborers at \$23.96/hour.
- The occupation with the highest Automation Index is Fast Food and Counter Workers, representing 566 jobs in Hilliard and has an Automation Index of 130.8.

Hilliard Census Tracts Occupations – Highest Automation Index					
Description	2022 Jobs	2027 Jobs	Avg. Hourly Earnings	Median Hourly Earnings	Automation Index
Laborers and Freight, Stock, and Material Movers, Hand	735	729	\$17.01	\$16.30	117.2
Heavy and Tractor-Trailer Truck Drivers	570	594	\$24.04	\$22.22	110.1
Fast Food and Counter Workers	566	602	\$11.25	\$10.29	130.8
Office Clerks, General	516	508	\$19.50	\$18.30	102.0
Stockers and Order Fillers	478	452	\$16.12	\$15.12	112.3
Construction Laborers	367	389	\$23.96	\$22.47	131.9
Cashiers	362	327	\$12.36	\$11.58	105.5
Bookkeeping, Accounting, and Auditing Clerks	327	319	\$22.45	\$21.73	103.6
Miscellaneous Assemblers and Fabricators	325	307	\$17.76	\$17.29	112.6
Waiters and Waitresses	324	323	\$12.41	\$10.53	129.8
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	279	283	\$14.94	\$13.54	122.5
Landscaping and Groundskeeping Workers	273	271	\$15.94	\$15.12	129.1

Lightcast, Class of Worker 2022.2

Retail Market Profile

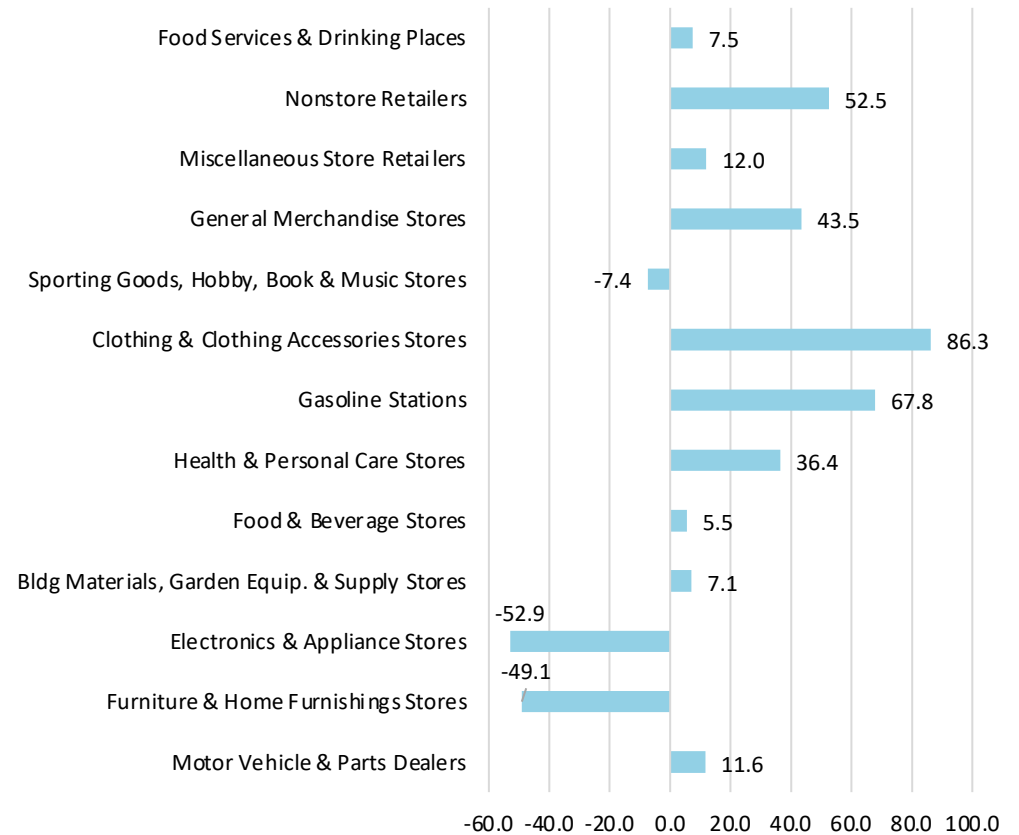
While Hilliard has a significant retail presence in the city, its residents often leave the community to shop in Columbus or in other Central Ohio suburbs. The Exploration phase of this strategy examined both the current retail market profile and the demand potential for various retail sectors. The demand potential is based on demographics and consumer spending.

The retail market profile considers existing supply and demand and any associated gaps or areas of surplus. The identified gaps indicate residents are leaving the city to obtain certain products elsewhere, which leads to a leakage of spending in Hilliard.

Following are discoveries from this analysis:

- Hilliard's population is projected to increase by approximately 8 percent or just over 3,000 new residents by 2026.
- During the same period Hilliard residents will see their median household income increase from \$98,000 to \$105,000.
- This is projected to lead to nearly \$700 million in new spending in the city. The largest category of spending is Financial, which includes savings and investments.

Hilliard Retail Leakage/Surplus Factor



Esri Business Analytics Online

Retail Market Profile

- The highest current surplus is in electronics and appliances, which have a demand of \$18.3 million, with a supply of more than \$59 million.
- Clothing and clothing accessories currently have the greatest gap, with demand estimated at \$27.6 million and supply at \$2 million, resulting in a gap of almost \$26 million.

Retail Demand Potential				
Top Tapestry Segments	Percent	Demographic Summary	2021	2026
Boomburbs (1C)	15.1%	Population	37,928	40,937
Bright Young Professionals (8C)	15.0%	Households	13,917	15,069
Rustbelt Traditions (5D)	11.2%	Families	9,903	10,676
Workday Drive (4A)	10.9%	Median Age	37.5	37.9
Professional Pride (1B)	10.2%	Median Household Income	\$98,220	\$104,966
		2021 Consumer Spending	2026 Forecasted Demand	Projected Spending Growth
Apparel and Services		\$38,610,182	\$46,164,840	\$7,554,658
Computer		\$3,687,851	\$4,411,068	\$723,217
Entertainment & Recreation		\$58,105,175	\$69,368,995	\$11,263,820
Food		\$164,967,656	\$197,276,200	\$32,308,544
Financial		\$2,672,093,346	\$3,175,172,334	\$503,078,988
Health		\$10,015,676	\$11,957,375	\$1,941,699
Home		\$352,587,641	\$419,475,381	\$66,887,740
Household Furnishings and Equipment		\$25,847,641	\$30,854,185	\$5,006,544
Household Operations		\$34,616,865	\$41,309,938	\$6,693,073
Insurance		\$146,085,454	\$174,458,269	\$28,372,815
Transportation		\$110,388,695	\$131,998,236	\$21,609,541
Travel		\$37,130,704	\$44,281,715	\$7,151,011

Esri Business Analytics Online

Target Sectors

In addition to exploration of various data to generally frame the Hilliard economy and begin consideration of strategic goals for this plan, it also includes analytics that will result in recommended target sectors. These targets should be sectors that are growing both nationally and regionally; that pay high wages; that Hilliard has a talent pipeline to support; and that fits within Hilliard's overall community desires.

Boyette has taken a comprehensive approach to considering the sectors for which Hilliard is likely to be in a strong competitive position to recruit them. This includes looking at the current situation from multiple perspectives, including the following:

- Current Major Employers
- Current Regional Sectors and Employers
- Current Employment by Sector
- Cluster Identification
- Recent Projects for which Hilliard Has Competed
- Available Sites or Buildings Appropriate for Chosen Sectors

Hilliard Employers

Hilliard's current major employers, which are shown at right, are primarily white-collar businesses, with some skilled manufacturing companies also included.

Hilliard Major Employers

Information

- Verizon
- Amazon Web Services
- Dish Network

Finance & Insurance

- Sedgwick Claims Management

Manufacturing/Trades

- Advanced Drainage Systems
- Armstrong World Industries
- EcoPlumbers
- Rich Products
- Sutphen

Business Services

- Equifax

Target Sectors

Regional & State Targets

Understanding the targets that are being pursued by regional and state economic development organizations is also important in determining local target sectors. These larger organizations are likely aggressively marketing to decision makers in these sectors, which is to the City's benefit. In addition, the research those Economic Development Organizations (EDOs) completed to identify targets may be similar in scope to how Hilliard's targets are being identified, which would then serve to validate the findings of all research used to inform Hilliard's targets.

- JobsOhio has 11 target sectors, some of which are traditional while others are looking toward future industries that are likely to result from new technologies and/or consumer demand; i.e., Advanced Mobility.
- JobsOhio includes several manufacturing targets in its list, such as Advanced Manufacturing, Aerospace and Aviation, Automotive, and Food and Agribusiness. In addition, JobsOhio has a very broad target simply labeled Technology.
- One Columbus, which represents 11 counties in Central Ohio, has identified four sectors that are the basis for the regional economy, including Logistics, Headquarters and Business Services, Technology, and Manufacturing.
- Those core sectors have then been refined to focus on six key industries for the organization. Manufacturing is not among the sectors listed by One Columbus, except for Automotive and Mobility, as well as the possibility of Biomedical and Health Services (including a manufacturing component).

JobsOhio Targets

- Advanced Manufacturing
- Advanced Mobility
- Aerospace & Aviation
- Automotive
- Energy & Chemicals
- Financial Services
- Food & Agribusiness
- Healthcare
- Logistics & Distribution
- Military & Federal
- Technology

One Columbus Key Industries

- Advanced Computing Services
- Automotive & Mobility
- Biomedical & Health Services
- E-Commerce
- Finance & Insurance
- Retail Brands

Target Sectors

Sector Employment & Growth

Data has also been analyzed related to the largest three- and four-digit NAICS sectors in Hilliard. This analysis included current employment, projected 2027 employment, and location quotient. Following are key discoveries from this step:

- The top five three-digit sectors are all projected to experience growth in the region during the next five years, with Ambulatory Healthcare Services expected to see the largest increase in employment at 11 percent.
- Of the top 15 three-digit sectors, only Merchant Wholesalers, Non-Durable Goods, is expected to see a decrease in employment through 2027.
- When examining the more detailed four-digit sectors, one of the top five – Insurance Carriers – is projected to decline by 6 percent, with State Government (excluding Education and Hospitals) employment expected to remain flat.
- Federal Government; Paint, Coating, and Adhesive Manufacturing; and Computer Systems Design are projected to see a slight drop in employment of 2 percent to 3 percent.
- Two sectors – Boiler, Tank, and Shipping Container Manufacturing and Paint, Coating, and Adhesive Manufacturing – both have very large location quotients, meaning that the concentration of jobs in those sectors is highly concentrated in the city when compared to the U.S.

Five Largest Sectors in Hilliard

3-Digit NAICS

- Insurance Carriers & Related Activities
- Local Government
- Food Services & Drinking Places
- Administrative & Support Services
- Ambulatory Healthcare Services

4-Digit NAICS

- Restaurants & Other Eating Places
- Local Government, Excluding Education & Hospitals
- Agencies, Brokerages, and Other Insurance-Related Activities
- State Government, Excluding Education & Hospitals
- Insurance Carriers

Target Sectors

Recent Project Wins in Hilliard

- The largest and most high-profile project to locate in Hilliard in the last five years is Amazon Web Services, which made a \$400 million investment and created an additional 200 jobs, in addition to the 122 that were retained.
- Forsee Power selected Hilliard for its North American headquarters and assembly facility in 2022 for the production of advanced battery systems, creating more than 150 jobs.
- In 2017 PharmaForce expanded its Hilliard operations, investing \$34 million, retaining 103 jobs, and creating eight new jobs.
- The Inn at Library Way, an assisted living facility, invested \$19.5 million in 2021.
- Trilogy Health Services created 90 jobs and invested \$15.2 million in Hilliard in 2017.
- Two new hotels – Marriott and Avid – were constructed in Hilliard in 2018 with an investment of \$12.7 million by Marriott and \$11.5 million by Avid. Both businesses employ approximately 16 people.

Industry Clusters

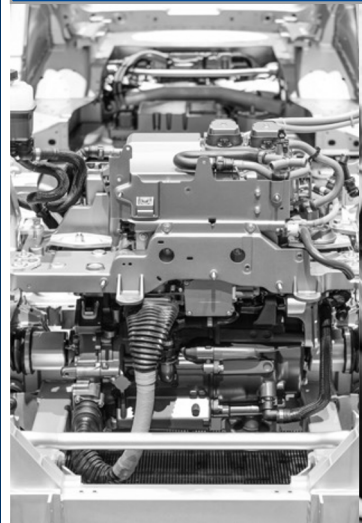
Industry clusters are groups of interconnected industries that would see a benefit from being near each other. Five industry clusters, listed at right, were identified as having a significant presence in the Hilliard area and were explored by individual six-digit NAICS codes within each cluster in Franklin County. The broader geography was used in this case because clusters often form in a region, rather than just one community. Following are key findings of that analysis:

- Financial Services, Business Services, and Insurance Services all show a number of sectors within the cluster that could present significant opportunity to Hilliard.
- The Information Technology and Analytical Instruments cluster provided information that illustrates how broad the IT sector can be and that manufacturing is a key component of that cluster in Franklin County.
- After the Hilliard targets were identified, the cluster analysis provided additional guidance into how each sector is defined.

Franklin County Industry Clusters

- Transportation & Logistics
- Financial Services
- Business Services
- Insurance Services
- Information Technology & Analytical Instruments

Hilliard Target Sectors



Automotive
Technologies



Business
Services &
Regional HQ



Entrepreneurs
& Startups



Information
Technology &
Associated
Manufacturing



Healthcare
Services &
Applied
Technologies



Film, Media &
Arts

Workforce Data Analysis

A community will not succeed in recruiting businesses from its target sectors if there is not an adequate workforce pipeline specific to the skills needed by those targets. Boyette has completed a workforce data review related to the potential target sectors to ensure Hilliard is prepared to meet employer demand in those sectors.

Generally, workers are willing to commute 45 minutes to an hour one way for a good job with adequate wages. For that reason, workforce analytics need to be done in a way that considers those potential workers who live within that commute time radius. For the Hilliard study, Boyette defined a potential labor market based on a 45-minute drive time from the Hilliard Municipal Building. To be as precise as possible, it is built using a collection of 90 Zip Codes that are in four counties – Delaware, Franklin, Madison, and Union.

The map to the right illustrates the combined Zip Code geography that represents a 45-minute drive time from Hilliard.

The two primary data sources used for the workforce component of the Hilliard economic development strategy are occupational data from Lightcast and a series of workforce questions that were included in the Hilliard resident survey fielded for this project.

Note that there is no occupational analysis for the Entrepreneurs and Start-ups target. This is because an entrepreneur can work in any business sector, which makes it difficult to adequately assess workforce availability.

45-Minute Drive Time Geography



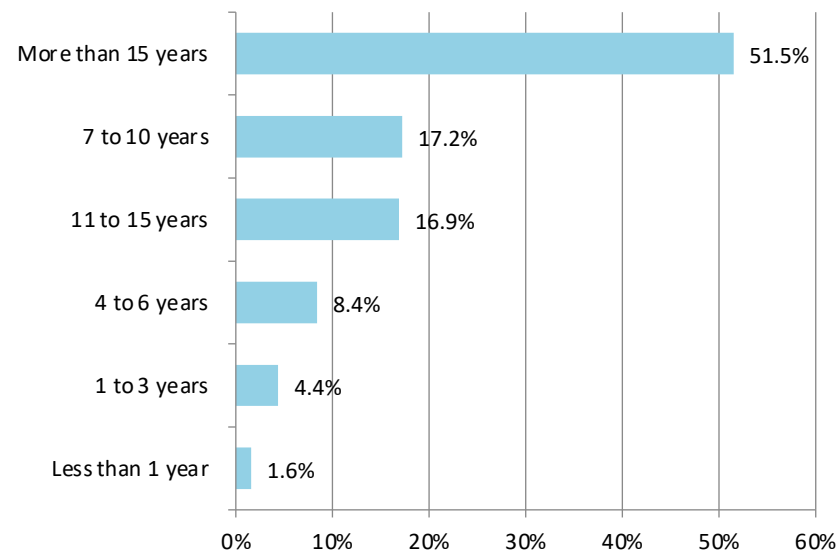
Workforce Data Analysis

Resident Survey Results

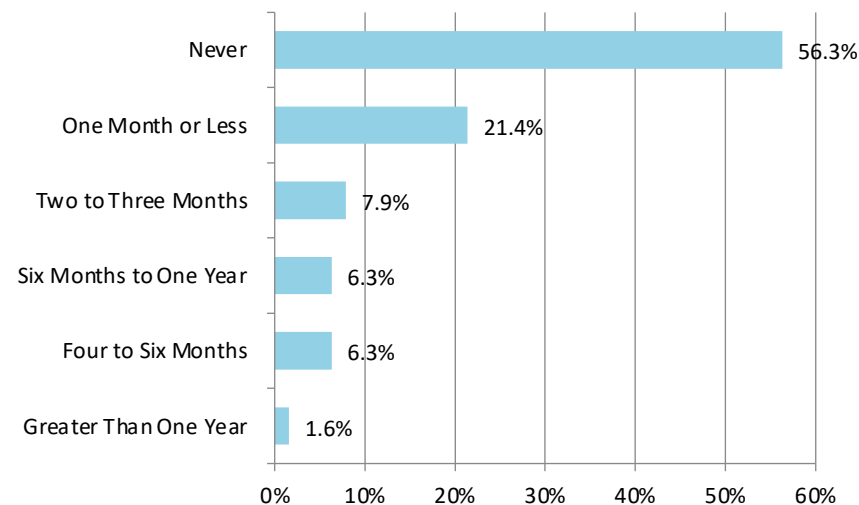
More than 375 residents in Hilliard participated in a survey covering a variety of economic development, workforce, and community development topics as part of this strategic planning process. Following are key findings related to workforce from that survey:

- Survey respondents are highly experienced in their chosen career field, with more than half having worked 15 years or more in that field.
- Only 14 percent of respondents reported six years or less of work experience in their field.
- Among respondents, only 7 percent were unemployed at the time they took the survey.
- The majority of those residents who are unemployed or are actively seeking other employment cite a desire for better pay and benefits as the reason they are seeking new employment. More than a quarter of respondents said general unhappiness with their job led them to look for new employment.
- One-third of respondents who said their job was impacted by Covid-19 are working remotely, with more than half of them not expecting to ever return to the office environment.

How much experience do you have in your current field of employment?



If you are working remotely, when do you think you will return to the office in person? (N=129)



Workforce Data Analysis

Occupational Analysis

Following are workforce findings resulting from analysis of occupational data:

- The majority of occupations in both the Information Technology and Business Services sectors require a Bachelor's Degree to qualify for those positions.
- Those two sectors also have, overall, the highest wages among the targets, although all identified sectors provide high-wage opportunities.
- Many of the occupations for the Automotive Technologies sector show a forecast decline in employment by 2027. However, those projects are likely not adequately accounting for the rapid growth of electric vehicles and the impact **that is** having on the Automotive sector and its suppliers.
- Only two occupations in the Healthcare sector are projected to decline, which indicates that the existing workforce availability challenges in that sector will continue.
- Tables on the following pages provide data related to occupational growth, median hourly earnings, and typical entry-level education for the top 15 occupations in each of the four target sectors that were analyzed.

Workforce Data Analysis

Automotive Technologies Occupations

Workforce Overview					
Automotive Technologies					
Occupation	2022 Employed in Industry Group	2027 Employed in Industry Group	2022 – 2027 % Change	Median Hourly Earnings	Typical Entry-Level Education
Miscellaneous Assemblers and Fabricators	3,450	2,926	(15%)	\$17.32	High school diploma or equivalent
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	443	386	(13%)	\$18.29	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand	347	331	(5%)	\$16.24	No formal educational credential
First-Line Supervisors of Production and Operating Workers	307	293	(5%)	\$30.18	High school diploma or equivalent
Industrial Engineers	307	299	(3%)	\$41.81	Bachelor's degree
Inspectors, Testers, Sorters, Samplers, and Weighers	307	272	(11%)	\$19.17	High school diploma or equivalent
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	276	256	(7%)	\$17.63	High school diploma or equivalent
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	249	230	(8%)	\$17.86	High school diploma or equivalent
Welders, Cutters, Solderers, and Brazers	241	247	3%	\$19.37	High school diploma or equivalent
Mechanical Engineers	219	213	(3%)	\$40.18	Bachelor's degree
Industrial Machinery Mechanics	179	183	2%	\$25.30	High school diploma or equivalent
Shipping, Receiving, and Inventory Clerks	151	143	(5%)	\$17.45	High school diploma or equivalent
Computer Numerically Controlled Tool Operators	134	125	(6%)	\$19.89	High school diploma or equivalent
Machinists	121	121	0%	\$22.09	High school diploma or equivalent
Electricians	116	106	(9%)	\$23.20	High school diploma or equivalent

Workforce Data Analysis

Business Services & Regional Headquarters Occupations

Workforce Overview					
Business Services & Regional Headquarters					
Occupation	2022 Employed in Industry Group	2027 Employed in Industry Group	2022 – 2027 % Change	Median Hourly Earnings	Typical Entry-Level Education
Customer Service Representatives	7,829	7,580	(3%)	\$17.72	High school diploma or equivalent
Software Developers and Software Quality Assurance Analysts and Testers	7,653	7,933	4%	\$48.41	Bachelor's degree
Project Management Specialists and Business Operations Specialists, All Other	3,665	3,706	1%	\$34.44	Bachelor's degree
Management Analysts	3,625	3,796	5%	\$39.88	Bachelor's degree
Computer Systems Analysts	3,370	3,292	(2%)	\$43.76	Bachelor's degree
Accountants and Auditors	3,117	3,240	4%	\$34.80	Bachelor's degree
Claims Adjusters, Examiners, and Investigators	3,101	2,957	(5%)	\$28.70	High school diploma or equivalent
General and Operations Managers	2,313	2,389	3%	\$50.08	Bachelor's degree
Market Research Analysts and Marketing Specialists	2,261	2,425	7%	\$32.08	Bachelor's degree
Human Resources Specialists	2,190	2,228	2%	\$28.18	Bachelor's degree
Insurance Sales Agents	2,005	1,949	(3%)	\$29.23	High school diploma or equivalent
Computer User Support Specialists	1,964	1,948	(1%)	\$24.96	Some college, no degree
Insurance Claims and Policy Processing Clerks	1,732	1,639	(5%)	\$19.24	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	1,731	1,724	(0%)	\$21.59	Some college, no degree
Office Clerks, General	1,668	1,639	(2%)	\$18.19	High school diploma or equivalent

Workforce Data Analysis

Healthcare Services & Applied Technologies Occupations

Workforce Overview					
Healthcare Services & Applied Technologies					
Occupation	2022 Employed in Industry Group	2027 Employed in Industry Group	2022 – 2027 % Change	Median Hourly Earnings	Typical Entry-Level Education
Registered Nurses	14,170	14,353	1%	\$31.93	Bachelor's degree
Home Health and Personal Care Aides	10,200	11,857	16%	\$11.64	High school diploma or equivalent
Medical Secretaries and Administrative Assistants	3,579	3,724	4%	\$17.36	High school diploma or equivalent
Licensed Practical and Licensed Vocational Nurses	2,988	3,222	8%	\$22.44	Postsecondary nondegree award
Receptionists and Information Clerks	1,814	1,961	8%	\$14.23	High school diploma or equivalent
Medical and Health Services Managers	1,584	1,776	12%	\$46.26	Bachelor's degree
Customer Service Representatives	1,204	1,182	(2%)	\$17.72	High school diploma or equivalent
Billing and Posting Clerks	1,087	1,154	6%	\$18.96	High school diploma or equivalent
Office Clerks, General	1,078	1,114	3%	\$18.19	High school diploma or equivalent
Medical Dosimetrists, Medical Records Specialists, and Health Technologists and Technicians, All Other	924	949	3%	\$19.77	Postsecondary nondegree award
First-Line Supervisors of Office and Administrative Support Workers	856	893	4%	\$28.90	High school diploma or equivalent
Project Management Specialists and Business Operations Specialists, All Other	670	677	1%	\$34.44	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	536	536	0%	\$19.03	High school diploma or equivalent
Software Developers and Software Quality Assurance Analysts and Testers	498	521	5%	\$48.41	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	477	476	(0%)	\$13.55	No formal educational credential

Workforce Data Analysis

Information Technology & Associated Manufacturing

Workforce Overview					
Information Technology & Associated Manufacturing					
Occupation	2022 Employed in Industry Group	2027 Employed in Industry Group	2022 – 2027 % Change	Median Hourly Earnings	Typical Entry-Level Education
Software Developers and Software Quality Assurance Analysts and Testers	703	781	11%	\$48.41	Bachelor's degree
Customer Service Representatives	107	106	(1%)	\$17.72	High school diploma or equivalent
Computer User Support Specialists	98	104	6%	\$24.96	Some college, no degree
Project Management Specialists and Business Operations Specialists, All Other	92	95	3%	\$34.44	Bachelor's degree
Industrial Engineers	89	88	(2%)	\$41.81	Bachelor's degree
Market Research Analysts and Marketing Specialists	81	89	11%	\$32.08	Bachelor's degree
Miscellaneous Assemblers and Fabricators	79	69	(13%)	\$17.32	High school diploma or equivalent
Computer Systems Analysts	69	70	2%	\$43.76	Bachelor's degree
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	69	72	5%	\$38.86	Bachelor's degree
Computer and Information Systems Managers	59	64	8%	\$66.44	Bachelor's degree
Electrical Engineers	57	55	(4%)	\$42.26	Bachelor's degree
General and Operations Managers	54	56	4%	\$50.08	Bachelor's degree
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	54	59	9%	\$25.92	High school diploma or equivalent
Mechanical Engineers	52	49	(5%)	\$40.18	Bachelor's degree
Inspectors, Testers, Sorters, Samplers, and Weighers	50	47	(6%)	\$19.17	High school diploma or equivalent

Stakeholder Engagement Findings



Approximately 400 Hilliard employees, residents, city leaders, entrepreneurs, educators, and economic development partners provided invaluable input into development of an economic development strategy for the City of Hilliard.

Stakeholder Engagement Findings

Key Trends

Stakeholder engagement is a critical component of any economic development strategy. It not only allows various stakeholder groups to provide input, but it also leads to stronger support for the resulting plan. For the Hilliard plan, individual and small group conversations were conducted with people who play some role in the overall success of Hilliard's economic development efforts. The stakeholder groups who participated in this portion of the project are listed in the box at right.

In addition to interviews and group discussions, it was also important to seek input from the broader community. The most efficient way to do that was to field an online survey and encourage all Hilliard residents and workers to participate.

Stakeholder Discussion Overview

Conversations with stakeholders addressed a variety of topics pertinent to development of this plan. These discussions not only allowed key stakeholders to share their opinions, but they also allowed the Boyette team to learn a bit more about Hilliard and Central Ohio and go beyond the data analytics to understand the personality of the community. Additionally, stakeholder conversations often result in uncovering something that has not previously been discussed or results in a potential strategy idea to further research. A summary of the stakeholder discussion findings begins on the next page.

Resident Survey Overview

The resident survey was developed by Boyette in collaboration with the City of Hilliard Economic Development Department and the comprehensive plan consultants with planning NEXT. While both planning processes needed stakeholder input, fielding two surveys would have been confusing and probably would result in a lower number of respondents. For that reason, planning NEXT provided five questions that were included in the survey. The City of Hilliard team distributed the survey link through social media, email, and collaboration with other groups who had email lists of Hilliard residents to ensure an adequate number of responses was received to validate the survey findings, which begin on page 36.

Discussion Participants

- Major Employers
- Entrepreneurs
- Educators
- Economic Development Partners
- City of Hilliard Employees
- Norwich Township Leaders

Resident Survey Responses

376

Stakeholder Engagement Findings

Stakeholder Discussions

While the Boyette team began each conversation with a series of fairly general questions, the conversations inevitably evolved to deeper discussions about each stakeholder's area of expertise and overall knowledge of economic development. Following are trends that have been identified from stakeholder discussions:

- Stakeholders were fairly consistent in identifying Hilliard's competitive advantages for economic development, with the most common responses being its quality of life, Downtown Hilliard, proximity to Columbus, and opportunities for further development.
- When thinking about challenges, many stakeholders mentioned a regional housing deficit, lack of adequate retail options, and a workforce that is lacking in some key skills.
- The employers who participated were asked how the City could better support their businesses. Incentives was the most common answer, but some employers also mentioned a need for more sites for future business development, difficulty finding an entry-level workforce, a need for more City services in the tech corridor, and expansion of the current industrial base.
- In thinking about Hilliard's top economic development opportunities, there was less agreement among stakeholders. However, the most frequently mentioned opportunities included more public-private partnerships, creation of a business-friendly identity for the City, additional development in Downtown Hilliard, entrepreneurship and innovation, more diversity, and enhanced workforce development options.
- When asked about their top priority for this plan, ensuring that it is implementable and actionable was a key desire. Others included resulting job growth, strong existing business support, making this plan cohesive with the new comprehensive plan, acquiring and preparing more sites for business development, and overall community preparedness.

Ideas for Unlimited Resources

- Establish a tech center or incubator
- Acquire additional land
- Create more green space
- Increase density
- Create a maker space
- Implement entrepreneurial program in K-12 schools
- Improve broadband to support work-from-home opportunities
- Expand Downtown Hilliard
- Attract more medical and IT businesses to the city

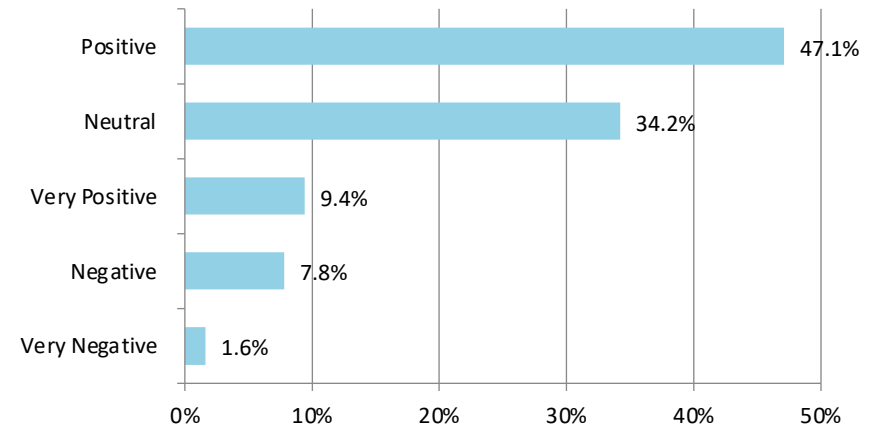
Stakeholder Engagement Findings

Resident Survey

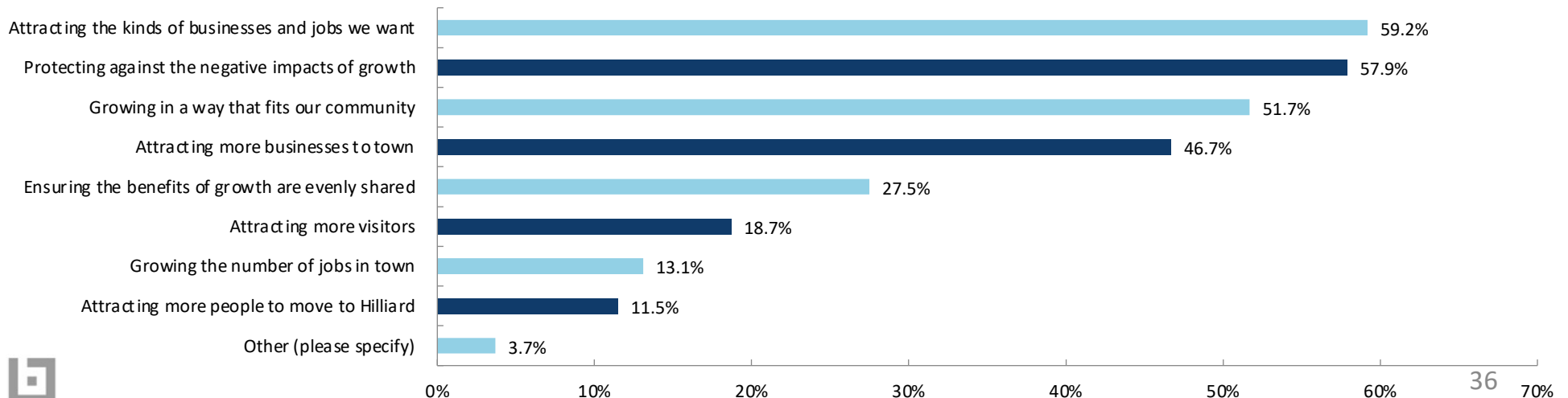
With approximately 375 resident respondents, the online survey provided key insights into a range of economic, community, and workforce development topics. Following are some of those findings:

- While 57 percent of Hilliard residents have a positive or very positive perception of the community, they are not as in sync when thinking about what economic development means for the City of Hilliard. The most frequent answer to that question was “attracting the kinds of businesses and jobs we want,” but two additional answers also were chosen by more than 50 percent of respondents – “protecting against the negative impacts of growth” and “growing in a way that fits the community.”

What is your perception of Hilliard’s reputation as a place to do business?



Economic development means different things in different places. When we talk about intentionally supporting economic development, what does it mean to you? (Please select only three.)

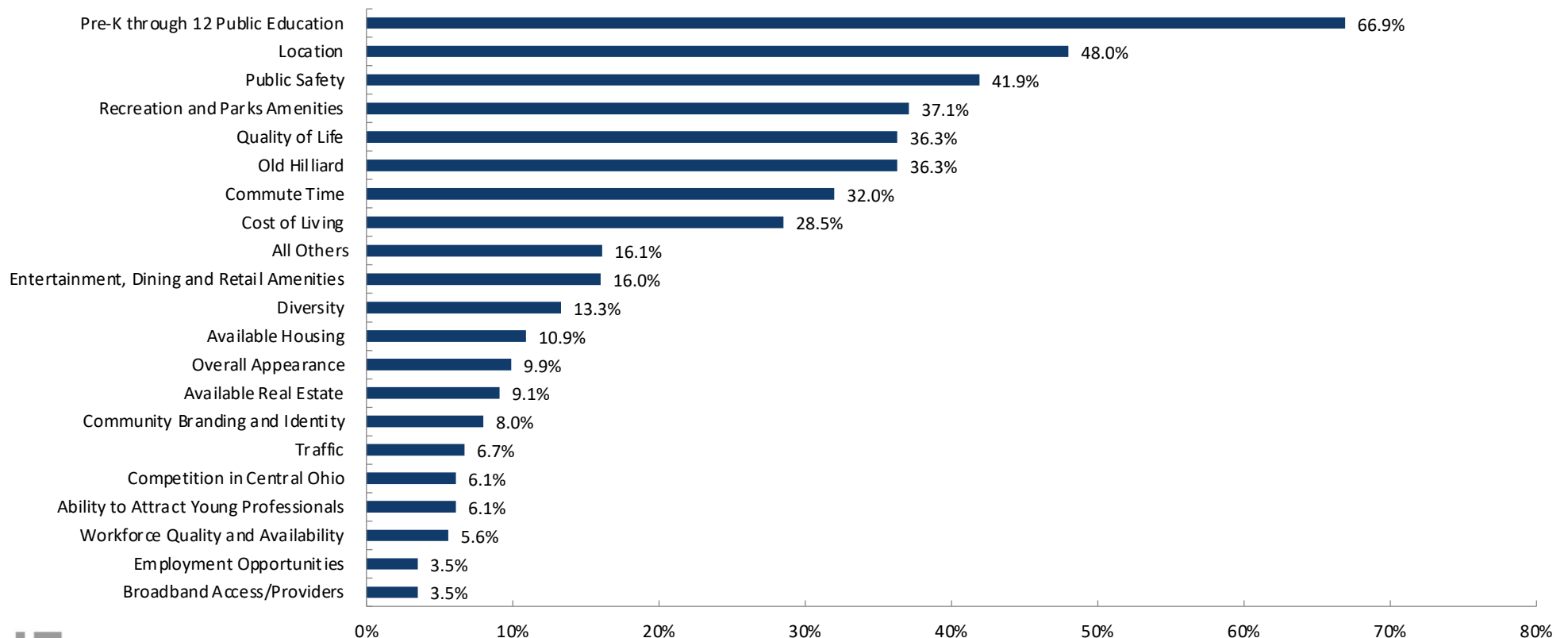


Stakeholder Engagement Findings

Resident Survey

- Residents focused primarily on livability issues when thinking about Hilliard's competitive advantages for economic development. The top five choices among residents were pre-K – 12 education, location, public safety, recreation and parks, and quality of life.
- The five answers with the fewest people choosing were more focused on the business side of economic development, including competition in Central Ohio, ability to attract young professionals, workforce quality and availability, employment opportunities, and broadband access.

What do you believe are Hilliard's top five competitive advantages for economic development?

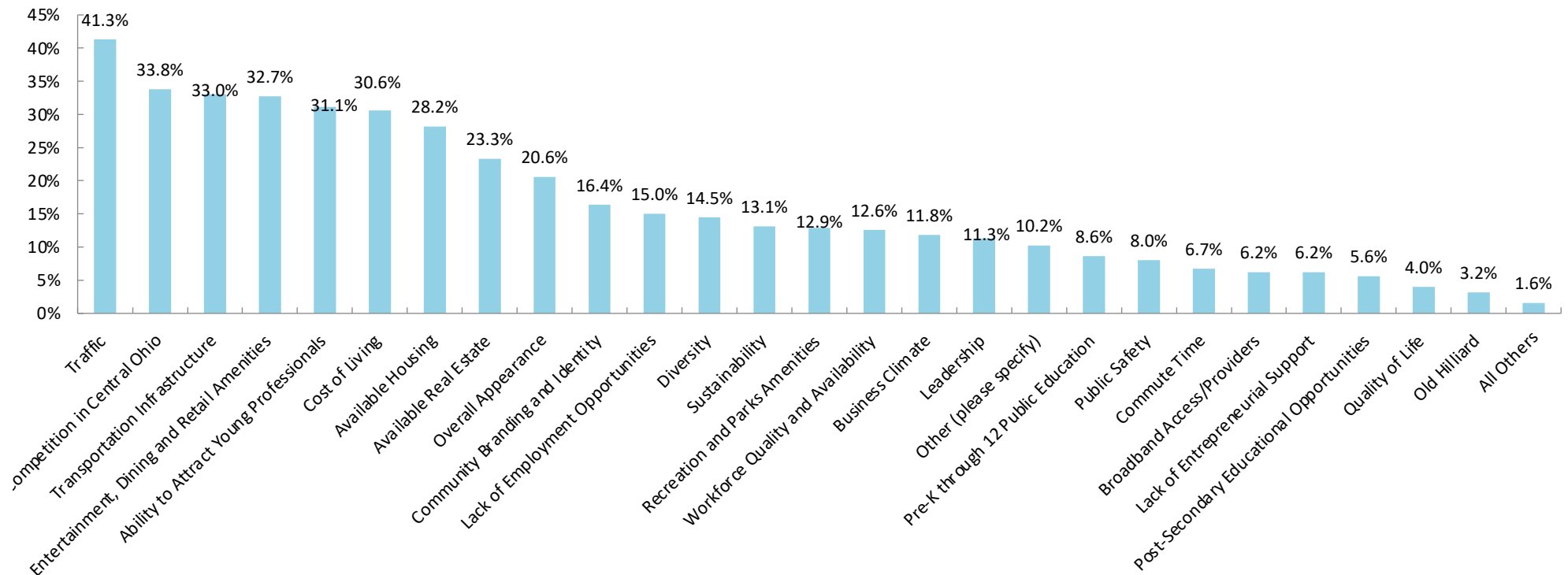


Stakeholder Engagement Findings

Resident Survey

- When asked about Hilliard's five challenges related to economic development, survey respondents chose traffic; competition in Central Ohio; transportation infrastructure; entertainment, dining, and retail amenities; and ability to attract young professionals as the top five concerns.
- Some of the five challenges chosen by the fewest respondents were among the important advantages identified in the previous question. The five challenges chosen by the fewest people are broadband access, lack of entrepreneurial support, post-secondary educational opportunities, quality of life, and Downtown Hilliard.

What do you believe are the top five greatest challenges facing Hilliard from an economic development perspective?



Stakeholder Engagement Findings

Resident Survey

In addition to multiple choice questions, the resident survey also included open-ended questions, giving respondents the opportunity to provide more perspective on the topics included. Following are key trends from those questions: (Note that the number following an x for each response is the number of times that answer was given by respondents.)

What would make Hilliard a better place to “work from home”?

- Broadband, Wi-Fi, & Fiber x77
- Restaurants, Retail, & Entertainment x44
- Walkability, Trails, & Green Spaces x43
- Third Spaces, Co-working spaces, & Community Spaces x26
- Taxes x15
- Housing x11
- Infrastructure x7
- City Appearance x4
- Amenities x2
- Childcare x2
- Diversity
- Employment

What types of events/amenities/development would make Hilliard a destination?

- Restaurants & Retail x83
- Destination Space/Activities x60
- Recreation x30
- Arts & Culture x30
- Trails & Green Space x19
- Walkability/Bikeability x12
- Small Business/Entrepreneurial Support x6
- Redevelopment/Infill x6
- Housing x6
- Transportation x5
- Economic Development x2



Little Rock ■ Atlanta

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