# V. LOCAL MARKET INPUT MEETINGS - VIEWS FROM FOUR COMMUNITIES

One of the limitations of large scale, statistical models is that they make projections for the “average” community. Specific features of individual communities are not part of the analysis. Local knowledge of specific circumstances is often excluded from the conclusions. They provide a bird’s eye view of the community.

In contrast to statistical models, this section examines local concerns, attitudes and insights into the likely impact of high speed rail for the specific communities of Cincinnati, Columbus, Middletown, and Toledo Ohio. All four cities are potential stations stops on the Ohio Hub. This section considers unique features of each community and how these factors will influence the impact of the proposed high speed passenger rail. Using this approach, the reasonableness of statistical models can be assessed in a qualitative manner, providing yet another mechanism for evaluating the potential economic and community impact of an investment in high speed rail by the state of Ohio

The core methodology used in this chapter was to solicit input from local experts in economic development, business development and transportation about the impact of improved inter-city rail on their community. This information was gathered by convening focus groups, or roundtables, of 10 to 20 recognized experts in each community to engage in a discussion and dialogue on the Ohio Hub and feedback from a survey distributed to participants in each focus group. The focus groups began with a brief overview of the proposed Ohio Hub system by ORDC and were followed by a structured discussion moderated by GEM Public Services. The use of local experts was supplemented by data from government and other sources.

## A. CINCINNATI

A meeting of public officials and private industry representatives was held in Cincinnati on October 6, 2006 at the Cincinnati City Hall. This meeting was organized with the assistance of the City of Cincinnati and the Ohio Rail Development Commission. A compilation of results from written questionnaires completed by meeting attendees is included in Appendix 5.A. of this report.

The purpose of this meeting was to gather local input regarding the potential economic impact of proposed Ohio Hub high-speed rail system, insights into potential uses and ridership, and to get insight into the placement of the Ohio Hub station stop in Cincinnati. Cincinnati had at least three alternative station stops to consider as potential Ohio Hub locations. Two of the location alternatives were in, or very near, downtown Cincinnati, with the third alternative somewhat removed from the downtown area, but with other strong reasons to be considered as a potential location.

### 1. Findings Regarding Passenger Service

Fifteen people attended the Cincinnati meeting and the vast majority felt that the public would use the Ohio Hub system for a variety of business and personal travel needs. Commuting and regular business meetings were the two dominant reasons for passenger travel expressed by the Cincinnati group, with sporting events, pleasure and shopping indicated, in descending order of importance, as significant reasons to use the high-speed rail system.

The group felt that weekday travel would be the most widely used period of the week with morning travel the most intense period of the day.

Since the Cincinnati stop is at the "end of the line" for the Ohio Hub, the timing of departures and arrivals throughout each day and each week were important to the group.

The group ranked conventions, sporting events and tourism as equally important reasons why people travel to Cincinnati from outside the city. Business travel was fourth, but only slightly behind the first three. Shopping and miscellaneous other reasons were expressed, but none as strongly as the four reasons cited above.

For most of the group, the Ohio Hub would appear to replace personal automobiles as the means of traveling to other destinations. Commercial air travel was cited as the second most frequently identified alternative that could be replaced by high-speed, intercity rail.

When asked to address the importance of face-to-face meetings in an environment of electronic alternatives, such as conference calls or video conferencing, most members of the group indicated that face-to-face business communications were still "very important" although the majority of respondents to the survey indicated that face-to-face meetings were becoming less important over time. This appears to indicate that face-to-face meetings are still an essential part of doing business, but electronic alternatives to face-to-face meetings are likely growing in importance.

More respondents indicated they are more likely to travel to other cities in Ohio (Columbus and Cleveland) as compared to travel out of state. Several respondents indicated that Cincinnati would be a likely destination suggesting that they would use the rail system for commuting purposes.

When asked about the types of businesses that would use high-speed rail, the majority of respondents to the question indicated that corporations would be the most likely business users followed by professional practices, service providers, and government workers.

As far as the types of people who would use the high-speed rail, the largest number of responses indicated pleasure travelers, with employees (business travel) and sports fans (pleasure travel) next in number of responses, followed by students and executives in descending order of responses.

The group cited time savings as the most important reason to use high-speed rail, with out-of-pocket cost savings, ability to do work while traveling, and congestion avoidance all equally cited as the next most likely inducements to travel by rail.

**2. Findings Regarding Regional Economic Growth**

All but one respondent in Cincinnati indicated they believed that high-speed rail would be either somewhat positive (8) or very positive (1) for the local economy.

Members of the group felt that office-based businesses would be the most likely to benefit from high-speed rail with retail and residential growth also indicated in declining number of responses.

The group also felt that businesses located in close proximity to the rail would be the most likely to benefit and the vast majority also felt it is “possible” to “very likely” that transportation oriented development would take place in close proximity to the chosen station stop in Cincinnati.

The table V.1 shows concentrations of employment by business and industry segments that could benefit directly, or indirectly, from the presence of the Ohio Hub, or upgrades in rail infrastructure induced by investments in high speed rail. High concentrations of local employment in a particular industry are represented statistically by a “location quotient”. Location quotients represent the ratio of local employment in a particular industry to a benchmark area (in this case the United States). A location quotient greater than 1.0 indicates the local area (or county) has a higher concentration of employees in that sector compared to the nation. Only significant concentrations are shown for the three counties detailed above.

Location quotients were collected for Butler, Hamilton, and Warren counties because the current route of the Ohio Hub anticipates station stops in these counties. The city of Cincinnati is in Hamilton County, while Butler and Warren counties are growing suburban employment and residential centers. Thus, these counties have the greatest geographic proximity to the Ohio Hub routes within the Cincinnati metropolitan area, and most likely to derive benefits from its operations.

**Table V.1. High Private Sector Location Quotients for Cincinnati and Middletown**

| Cincinnati MSA Area Counties | Butler | Hamilton | Warren |
|---|---|---|---|
| Paper manufacturing | 4.33 | | 3.18 |
| Printing and related support activities | | | 2.91 |
| Petroleum and coal products manufacturing | | | 3.87 |
| Chemical manufacturing | | 2.27 | |
| Plastics and rubber products manufacturing | | | 2.61 |
| Primary metal manufacturing | 8.45 | | 2.72 |
| Computer and electronic product manufacturing | | | 2.58 |
| Truck transportation | 2.04 | | |
| Warehousing and storage | 2.82 | | |
| Insurance carriers and related activities | 2.32 | | 2.12 |
| Management of companies and enterprises | | 3.45 | |
| Museums, historical sites, zoos, and parks | | 2.00 | |
| Amusements, gambling, and recreation | | | 4.12 |

*NOTE: Location quotients reflect the percentage of local employment compared to the same employment segment percentage nationally. A location quotient greater than 2.0 means that a County has twice the percentage of employment, in a given category, as the nation.*
*Source: U.S. Department of Labor*

### 3. Findings Regarding Site Development

The following table provides some basic demographic measures for the ¼ mile and ½ mile radii around the proposed Cincinnati station stop at Union Terminal. TEMS has defined their "rent tents" as falling within these two radii, the discussion in this section, and other sections of this report employ the same radii for consistency. The numbers provide some idea of the current composition of the neighborhood and the population and households that could be impacted upon the arrival of the Ohio Hub.

**Table V.2 Demographic Profile for the 1/4 and 1/2 Mile Radii Around the Station Stop in Cincinnati**

| Cincinnati, | 1990 | | 2000 | | 2006 | | 2011 | |
|---|---|---|---|---|---|---|---|---|
| Ohio | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile |
| Total Population | 1,045 | 7,782 | 1,144 | 4,852 | 1,066 | 4,518 | 1,009 | 4,270 |
| Total Households | 445 | 3,161 | 445 | 2,198 | 407 | 2,040 | 378 | 1,919 |
| | | | | | | | | |
| Housing units | 458 | 3,477 | 456 | 2,891 | 455 | 2,925 | 453 | 2,955 |
| Owner Occupied | 2.0% | 2.4% | 0.8% | 4.6% | 1.8% | 5.0% | 2.8% | 5.5% |
| Renter Occupied | 95.1% | 88.6% | 96.8% | 71.5% | 87.7% | 64.8% | 80.6% | 59.4% |
| Vacant | 2.9% | 9.1% | 2.5% | 24.0% | 10.5% | 30.3% | 16.7% | 35.1% |
| Median Home Value | $52,425 | $38,827 | N/A | $110,290 | N/A | N/A | N/A | N/A |
| | | | | | | | | |
| Average HH Income | $18,456 | $9,017 | $19,723 | $20,151 | $19,711 | $20,531 | $21,067 | $21,449 |
| Median HH Income | $14,042 | $5,102 | $16,291 | $9,360 | $17,817 | $8,772 | $19,180 | $9,163 |
| Per Capita Income | $7,939 | $3,704 | $7,672 | $9,129 | $14,670 | $11,416 | $16,430 | $12,227 |
| | | | | | | | | |
| Employment | N/A | N/A | N/A | N/A | 900 | 2,784 | N/A | N/A |
| Establishments | N/A | N/A | N/A | N/A | 59 | 188 | N/A | N/A |

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From Data Supplied by DemographicsNow.com

Cincinnati has considered three potential sites for the Ohio Hub rail stations in or near the central city. Rail is nearby, but would have to be extended to this site. The first alternative is in a transportation center in the central business district. The second station location alternative is at location known as “Longworth Hall” near the Ohio River west of the current right-of-way of I-75. This site is immediately west of the central business district, but somewhat removed from downtown business activity due to the interstate highway (I-71/I-75) and bridge to Kentucky. Freight rail is at this site, but the rail would have to be improved in order to be used for passenger service. The third alternative is at Union Terminal. This is the historic rail station serving Cincinnati, but it significantly removed from the central business district, and access to the downtown or other destinations would be either by bus, taxi, or personal automobile.

The Union Terminal location is the preferred location according to local officials present in the meeting. This location is the traditional rail stop in the City and it is better located to serve destinations like the University of Cincinnati and area hospitals, all located north of the central business district. In addition, this location is at a grade high enough to route directly across the Ohio River in the event the high-speed rail system is extended into Kentucky and/or to the Cincinnati Airport.

Existing infrastructure could be shared with Amtrak relative to passenger traffic through Union Terminal and the station clearly has the capacity to serve more travelers (commuters), even with the conversion of much of the facility to museum purposes. On-site parking and connections to downtown, the University of Cincinnati, local hospitals, and other destinations would have to be provided independently.

## B. COLUMBUS

A group of community development officials and transportation leaders met, on November 20, 2006, at the request of the Ohio Rail Development Commission, with the cooperation of the Columbus Chamber of Commerce. The purpose of the discussion was to consider the impact of the proposed inter city passenger rail system on the city of Columbus and its economic region. Three broad areas of interest were: a) passenger service, b) regional economic growth, and c) site development. As in the other focus groups, participants were given a presentation that described the proposed Ohio Hub system prior to the discussion.

### 1. Findings Regarding Passenger Service

The majority of the respondents believed that high speed passenger rail would likely be competitive with automobile travel for a small percentage (about 5%) of travelers. Passenger rail was expected to be most competitive for business travelers. The high degree of perceived substitutability for business travelers likely reflects their desire to work while traveling and the fact that the rail system will connect with important business destinations in the central business district (in Columbus and other major cities). Responses to a set of questions administered to the participants are provided in Appendix 5.B.

Trips to airports were another high potential use for which rail travel was viewed as very competitive with automobiles. During the discussions, several participants spoke strongly in favor of building a rail line directly to the airport (Port Columbus). The large catchment area for the airport was also mentioned as a reason for a direct airport connection. Participants were less optimistic about the potential for bus service to provide service to the airport in lieu of rail service. Some participants anticipated that first taking a train to Columbus and then taking a bus to the airport would be “a hassle”. The implication was that if a bus connection is necessary it should be well coordinated with the rail service. Consideration should be given to having the bus connector under the operating control of the passenger rail authorities because it will be such a critical link in the success of the passenger rail system.

Speed was recognized as an important factor in attracting riders but concern was expressed about the willingness of freight rail providers to coordinate with the high speed passenger system.

Only moderate use of the rail system was anticipated for regular commuting by some participants while others felt it might be significant, particularly when linked to a station stop north of Columbus. Personal travel on rail, where non-nodal points will be connected or where there may be multiple destination points, was not considered a good substitute for the automobile. Even in the case of personal travel, however, several respondents replied that rail passenger service would be competitive. (See question 15 in Appendix 5.B.)

With regard to fares, the community respondents felt that the out-of-pocket costs estimated by TEMS were reasonable and would not unduly restrict passenger travel. One person suggested that families might stay with the automobile, but the fare system would be very appealing to single travelers. Family fares might be addressed in later stages of the planning process.

Another aspect of passenger service discussed among the group was the travel demand generated in the area by the presence of Ohio State University. First, significant demand will be generated by events, particularly sports events associated with the university. Perhaps more important in the long run was the possibility that OSU would further limit the ability of students to park on campus. If campus parking is limited and off campus parking spaces become more costly, students will be attracted to rail. Even in the absence of parking restrictions, students were frequently mentioned as likely users of the rail system for trips home and other events. (See Appendix 5.B, question 6).

When asked what factors would induce travelers to switch from automobile to rail, for trips of between 100-300 miles, time saving and the ability to work while traveling were the most frequent responses. Both responses reflect genuine advantages of rail travel, supporting the TEMS estimates. Convenience to destination was also important reinforcing the need for excellent station stop locations and connectivity with a bus system. The ability to save wear and tear on the car was the least important consideration. Since savings on automobile deprecation is in reality a significant cost savings, this aspect of rail travel might be emphasized in early promotions. Findings from question 8 are mirrored in question 16.

The qualitative responses suggest that the ridership will be substantial and did not raise any “red flags” regarding the TEMS ridership estimates. The consensus at the meeting was that there were many segments of the Columbus market with potentially high levels of intercity rail ridership.

### 2. Findings Regarding Regional Economic Growth

A second topic concerned the extent that the proposed passenger rail system would contribute to economic growth in the area. If new regional growth did not occur, the impact of the rail system may be to redistribute growth near the rail station and away from somewhere else in the region. In other words, economic activity may still relocate near the station stops, but the gain in activity will not be net to the region; increased activity at one place might be at the expense of somewhere else in the region.

Ten of the 11 respondents believed that the high-speed rail system would have a very positive or a positive impact on economic growth for the Columbus area economy. See question 8 in Appendix 5.B. The respondents were unanimous in their belief that the rail system would generate long-term economic growth opportunities primarily in the office-oriented occupations.

In addition to the benefits for office-oriented occupations, the community representatives foresaw benefits from improved freight transportation. Wholesaling, manufacturing, and Food processing were highlighted as sectors that would be strengthened by improved freight transportation. Courier dependent business—especially legal and government—were singled out as benefiting from improved movement of goods.

Respondents very strongly linked the improvements in passenger rail to improvement in quality of life. Improved quality of life was in turn considered a key to economic development. The theory articulated by several participants has been developed and elaborated by many recent economic development officials such as Richard Florida. It may be summarized:

Quality of Life → Talented People in Area →Increased Economic Activity.

The talent driven model differs from the traditional view that implicitly assumes that top talent competes in a national labor market and employees, or potential employees, will relocate to where the good paying jobs are.

Columbus was viewed as competing with coastal cities for brain-intensive activities needing creative and innovative talent—scientists, engineers, economists, artists and so forth. Under this model, new activity is made possible by individuals in the “creative class”, a term coined and popularized by Richard Florida in his book *The Rise of the Creative Class*. The creative class is attracted to amenity rich areas. As one participant said, “We are 10 years away from a talent war for the best and brightest young people. We know that group loves connectivity and we need the talent to attract headquarters types of activity.” It was also observed that, “companies need to be able to retain good talent”, so the region must become a place where people want to live for reasons other than being a job site. A region’s quality of life has been mentioned increasingly in location studies as a reason companies select an area to relocate or start a new enterprise.

Columbus was considered to be at a disadvantage compared to coastal cities in its ability to attract the talented labor pool needed for future growth.

How will passenger rail contribute to the ability of Columbus to attract a talented labor pool? As a stand-alone metropolis, Columbus lacks the cultural amenities and entertainment outlets that cities on the coasts possess. Focus group participants suggested that a high speed rail connection to other Ohio cities, particularly Cleveland, would greatly enhance the amenity base of Columbus.

In comparison to the economic development positives of constructing the passenger rail system, at least one participant expressed concern that not moving forward with the rail project would be detrimental to the competitive position of the region. In other words, the rail project was necessary for Columbus to keep-up with the competition.

The importance of connectivity in encouraging economic development was strongly expressed in the Columbus focus group. This idea could easily be extended to most major places in Ohio that will be connected by passenger rail.

Another economic development aspect of passenger rail concerns the importance of face-to-face communications. To the extent that e-mails, video conferences and teleconferences have emerged as communications tools, will physical connectivity continue to be important? Some observers believe that face-to-face communications will still be important because of the subtle information that can be discerned only from body language and other information communicated directly. Most respondents believed that face-to-face communications would continue to be important and some believed that face to face communications would become more important. See questions 1, and 2 in Appendix 5.B. Thus, concerns that business oriented travel would diminish due to communications innovations were not supported by the participants.

Finally, the role of intercity rail in the context of an overall transportation plan for the region was raised. Participants seemed to agree that Columbus needed more transportation capacity. They said congestion was looming as a damper on economic growth. Intercity passenger rail was seen as part of the remedy. If rail service is incorporated into an overall transportation and economic development plan, some other efforts to elevate congestion such as road redesigns may be avoided. In this regard, it was suggested that places like Chicago should be examined and problems they face may be avoided by better planning.

Improving freight capacity will also generate important economic development benefits. Table V.3 shows the industrial compositions of private employers in the region's counties. Only industries with high employment concentrations are shown. An analysis of the employment structure of the Columbus area is somewhat misleading. Since Columbus is the state capital, the private sector data do not adequately describe the area's industrial composition. However, private sector activity will reflect potential benefits generated through improving the freight services.

**Table V.3 High Private Sector Location Quotients for Columbus**

| **Columbus MSA Area Counties** | **Delaware** | **Franklin** | **Madison** | **Morrow** |
|---|---|---|---|---|
| Beverages and Tobacco | | 2.22 | | |
| Wood Products | | | 2.12 | |
| furniture and related | | | 4.06 | |
| Machine manufacturing | | | | 3.31 |
| Gasoline stations | | | | 7.13 |
| Warehousing | 4.79 | 3.15 | | |
| Insurance | 2.03 | 2.27 | | |
| Amusements etc | | 2.28 | | |
| Nursing Homes | | | | 4.22 |

*Location quotients reflect the percentage of local employment compared to the same employment segment percentage nationally. A location quotient greater than 2.0 means that a County has twice the percentage of employment, in a given category, as the nation.*

*Source: U.S. Department of Labor*

While the focus of the Columbus meeting stresses the importance of travel for individuals in the service sector, the examination of location quotients suggests that warehousing and some manufacturing activities may benefit form the improved transpiration capacity that freight carriers may receive from track improvements associated with the passenger rail. Both Delaware and Franklin counties are major distribution centers. Madison and Marrow counties have important manufacturing activity that may be enhanced by improved freight service.

The Columbus community representatives strongly supported the idea that the proposed high speed rail system will be a positive stimulus to the metropolitan economy. Similarly, lack of improvement in transportation capacity was viewed as a long term threat.

### 3. Findings Regarding Site Development

The Columbus station stop will likely be located near the existing Columbus convention Center, about one-half mile from the State Capitol. In general, the area is developed with buildings designed for office use with significant ground level retail shops and restaurants. The site is within walking distance of Nationwide Plaza and a short taxi ride to the State Capital and office buildings. There are several sizable parking lots in proximity and the site is contiguous to I-670. See the map and aerial photograph in Section V of this report for further details regarding the station location.

The location of the proposed station stop was not controversial in the sense that nearly everyone in the focus group considered the location at the Columbus Convention Center appropriate. When the station is designed, it could be oriented towards the Capitol Building nearer Nationwide Boulevard in order to strengthen the synergy with Columbus downtown.

When asked to evaluate the proposed site the respondents identified several major factors as being strongly positive: 1) support of downtown, 2) access, 3) support for local businesses, and 4) the conditions of the surrounding area. Still positive, but relatively less favorable aspects included: 1) links to other transportation modes, 2) historic preservation, and 3) stimulation of new investment. See questions 10 and 12.

With regard to stimulation of new businesses, several participants believed that the areas near the proposed station stop were currently ripe for significant residential, office and retail development. The inclusion of the high speed passenger rail station in the area will alter the character of new development.

However, significant development of the immediate area would likely occur anyway. Office development is the driver for real estate development in the area. Retail development is likely to follow office development.

Some respondents believed that the rail transit stop would influence the demographic composition of the area. Specifically, younger, “genXers” who might themselves be an economic development asset, are likely to be attracted to the area. In this regard, some participants suggested that younger families might not require a second car if they could depend on rail transportation, particularly for longer trips.

The demographic analysis for both the ¼ mile and ½ mile radii of the area indicates scattered, low income, disproportionately minority residents mix with a fast growing service-oriented business base. A ¼ mile residential population of 33 contrasts with an employment base of 35,821 persons. The “day time” population consists of predominantly white collar workers. The predominant daytime occupations are Executive Managers, Administrative Support Workers, and Professional Specialty Occupations. Not surprisingly, the main industry was public administration. However, among residents, the median household income for 2006 is estimated as $21,579 and $24,267 for the 2/4 mile and ½ mile surrounding areas respectively.

**Table V.4 Demographic Profile for the 1/4 and 1/2 Mile Radii Around the Station Stop in Columbus**

| **Columbus,** | **1990** | | **2000** | | **2006** | | **2011** | |
|---|---|---|---|---|---|---|---|---|
| **Ohio** | **1/4 mile** | **1/2 mile** | **1/4 mile** | **1/2 mile** | **1/4 mile** | **1/2 mile** | **1/4 mile** | **1/2 mile** |
| Total Population | 26 | 482 | 30 | 866 | 33 | 873 | 35 | 881 |
| Total Households | 22 | 108 | 26 | 269 | 29 | 271 | 31 | 274 |
| | | | | | | | | |
| Housing units | 28 | 133 | 28 | 286 | 34 | 315 | 38 | 341 |
| Owner Occupied | 10.5% | 8.4% | 20.6% | 6.7% | 19.4% | 7.2% | 18.6% | 7.6% |
| Renter Occupied | 66.1% | 72.3% | 72.5% | 87.4% | 65.9% | 78.9% | 61.5% | 72.9% |
| Vacant | 23.4% | 19.3% | 7.0% | 5.9% | 14.7% | 13.9% | 20.0% | 19.4% |
| Median Home Value | $54,575 | $62,642 | $143,613 | $152,351 | N/A | N/A | N/A | N/A |
| | | | | | | | | |
| Average HH Income | $22,202 | $21,572 | $38,730 | $34,465 | $40,038 | $43,936 | $42,481 | $45,959 |
| Median HH Income | $9,753 | $17,136 | $19,409 | $21,803 | $21,579 | $24,267 | $22,734 | $25,314 |
| Per Capita Income | $13,064 | $7,421 | $33,563 | $10,707 | $24,698 | $30,318 | $26,240 | $32,349 |
| | | | | | | | | |
| Employment | N/A | N/A | N/A | N/A | 11,697 | 35,281 | N/A | N/A |
| Establishments | N/A | N/A | N/A | N/A | 501 | 1,556 | N/A | N/A |

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From Data Supplied by DemographicsNow.com

Substantial retail activity in the area serves the daytime population and convention visitors. In the ½ mile radius there were 1,037 restaurants. The existing restaurants will benefit from the location of the station stop.

The demographic and employment analysis is consistent with an area in land use transition. Specifically, the median household income is too low to support the median home value, suggesting that the property values are high in anticipation of a land use change.

In the meantime, property owners are renting the housing as "taxpayers" to recoup a portion of their expenses. Of the housing units in the area, about 90% are either renter occupied or vacant.

Because the area near the proposed station is already developing quickly, an early commitment to the passenger rail may help guide the character of development.

The proposed station stop will likely intensify the existing pressure towards a more dense mixed use land use. The pressure for parking will be significant. The area is already a convention center and has good connectivity with other parts of the region.

The community experts suggested that the likely parking squeeze may be ameliorated somewhat because there are likely to be more commuters coming into the Columbus area during working days than leaving the area after working hours. The commuters coming in to the area will leave their cars at home. The northern Columbus station stop was seen by the participants as being strongly affected by the rail system. While the area near the downtown Columbus station stop was already moving in the direction of more intensive land use, the site selected for the northern Columbus stop will experience substantial new residential development. The development in the northern Columbus transit stop will likely extend many miles beyond the station stop as potential commuter's park and ride accommodate suburban riders. Accordingly, they projected a flat rent tent near the northern Columbus stop.

The conclusion of the local observers is that economic growth will occur near the downtown area. This growth is likely even if the passenger rail system is not built. The downtown rent tent is likely to become more step even without passenger rail. While overall density may not increase due to rail connectivity the character of development will be influenced.

## C. MIDDLETOWN

A meeting of public officials and representatives from private industry was held on September 27, 2006 at the Middletown city building. This was the first of the four meetings conducted in cities that were likely to have station stops along the Ohio Hub rail corridor. A detailed compilation of a survey questionnaire for Middletown is included in Appendix 5.C. of this report.

### 1. Findings Regarding Passenger Service

Among the attendees at the Middletown meeting, commuting was the most frequently cited reason for using the high-speed rail system. Pleasure, regular business meetings, shopping, and sporting events were all highly ranked as additional reasons to use the Ohio Hub.

The respondents to the question regarding likely destination points cited Cincinnati most frequently, with Columbus second in order of frequency, and Cleveland third. Among the respondents, trips to Dayton were actually indicated less frequently than trips out-of-state.

When queried about the reasons why people would use the Ohio Hub, the respondents in Middletown cited business most frequently, tourism second most frequently, and sporting events third.

The group indicated they felt that face-to-face communications were important, or very important, as a means of business communications, but they also indicated that it is becoming less important to business. This question was asked in order to gather some data regarding perceptions of alternative means of business communications replacing business trips.

The group cited weekday ravel as most important with mornings the most important time period of the day. The group responses in Middletown suggest that the community envisions the Ohio Hub providing commuter service, predominantly to Cincinnati and Columbus.

In Middletown, the meeting attendees cited “Service Providers” as the type of business that could take the most advantage of the high-speed rail, with “Government Workers” the second most frequently cited business type to use the rail service. Corporations, professional practices and educators were all identified equally as potential business users of the rail service, but the frequency of responses was well below the first to groups, cited.

Among the types of people using the rail system the most, the Middletown group cited employees, pleasure travelers, and sports fans equally in their responses to this question. Students as rail users were only slightly behind the first three categories cited by respondents to this question.

Time savings, out-of-pocket cost savings, and congestion avoidance were equally important to the Middletown group as reasons to use the high-speed rail system. Two additional reasons; convenience to destination and congestion avoidance, were frequently identified by the group.

Four arrivals and departures are projected for the Middletown station. The community group felt this number of arrivals and departures was too low for Middletown.

Among members of the meeting group, the majority indicated they would be very likely to use high-speed rail for business purposes and somewhat likely to use the system for personal use. The group indicated they would be very likely to use the system for commuting. If connections were in place, the group indicated they would use the system to access the airport (no definition of airport destinations was provided).

## 2. Findings Regarding Regional Economic Growth

The Middletown meeting group was positive regarding potential economic growth that could emerge from the development of the Ohio Hub. The group felt that business would benefit with retail businesses the most frequently identified as businesses that would benefit.

The participants felt that the Ohio Hub could help lead to redevelopment in the heart of Middletown. The high-speed rail system would lead to increased traffic around the station location that could benefit businesses selling food and beverages along with small consumer goods. In addition, one respondent cited the rail system as a potential source of demand to bolster a “sagging” housing market in Middletown.

The group expressed a consensus of opinion that the proposed station location is in an area of town that is in “moderate” to “poor” condition. The group also felt that access to the proposed station location was only moderate to poor. Linkages to other modes of transportation were deemed to be “poor” by most of the members of the group.

A majority of responses to the survey indicated that the proposed station location would benefit downtown Middletown and nearby businesses. Historic preservation was perceived as a good to very good outcome of the presence of the Ohio Hub and the group was relatively positive regarding the stimulation of new investment in the city.

The following table details some specific employment concentrations by industry segment for the Butler County and Warren county areas in which Middletown is located. These industries may benefit from the Ohio Hub once it is operational.

**Table V.5 High Private Sector Location Quotients for Cincinnati and Middletown**

| Cincinnati MSA Area Counties | Butler | Hamilton | Warren |
|---|---|---|---|
| Paper manufacturing | 4.33 | | 3.18 |
| Printing and related support activities | | | 2.91 |
| Petroleum and coal products manufacturing | | | 3.87 |
| Chemical manufacturing | | 2.27 | |
| Plastics and rubber products manufacturing | | | 2.61 |
| Primary metal manufacturing | 8.45 | | 2.72 |
| Computer and electronic product manufacturing | | | 2.58 |
| Truck transportation | 2.04 | | |
| Warehousing and storage | 2.82 | | |
| Insurance carriers and related activities | 2.32 | | 2.12 |
| Management of companies and enterprises | | 3.45 | |
| Museums, historical sites, zoos, and parks | | 2.00 | |
| Amusements, gambling, and recreation | | | 4.12 |

*NOTE: Location quotients reflect the percentage of local employment compared to the same employment segment percentage nationally. A location quotient greater than 2.0 means that a County has twice the percentage of employment, in a given category, as the nation.*
*Source: U.S. Department of Labor*

### 3. Findings Regarding Site Development

The focus of this meeting was on the ridership and general economic development benefits, but some site-specific information was also gathered.

The consensus of opinion was that it would take a significant amount of community investment to make the proposed station attractive for use as the local Ohio Hub station stop. A substantial amount of redevelopment appeared to be evident to the local community group. Parking was cited as an impediment to use of the proposed station location in Middletown. The importance of the streets in close proximity to the proposed station was observed as a potential conflict with the trains unless a grade separation could be achieved that enabled vehicular traffic to circulate unencumbered by stopped trains at the station.

While the group indicated that residential development could be aided by the presence of the Ohio Hub, they cited several reasons why they did not believe that residential development could be accomplished in conjunction with the local station, including noise, lack of available land, and high volumes of traffic with poor road circulation.
Ultimately, the group felt that the overall attractiveness of the station stop would be critical to the success of the Ohio Hub in Middletown. More data regarding site development is contained earlier in this report in Section IV, “Long-term Economic Development Benefits of the Ohio Hub”.

Table V.6 provides some insight into the current status of the ¼ mile and ½ mile radii surrounding the proposed station stop, the former passenger station, in Middletown.

**Table V.6 Demographic Profile for the 1/4 and 1/2 Mile Radii Around the Station Stop in Middletown**

| Middletown, | 1990 | | 2000 | | 2006 | | 2011 | |
|---|---|---|---|---|---|---|---|---|
| Ohio | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile |
| Total Population | 1,043 | 4,892 | 1,023 | 4,795 | 1,026 | 4,763 | 1,031 | 4,749 |
| Total Households | 420 | 2,025 | 429 | 2,023 | 431 | 2,011 | 434 | 2,010 |
| | | | | | | | | |
| Housing units | 451 | 2,185 | 488 | 2,271 | 503 | 2,313 | 517 | 2,359 |
| Owner Occupied | 30.1% | 34.8% | 27.8% | 33.8% | 27.6% | 33.7% | 27.4% | 33.5% |
| Renter Occupied | 63.1% | 57.9% | 60.0% | 55.3% | 58.1% | 53.3% | 56.6% | 51.7% |
| Vacant | 6.9% | 7.3% | 12.2% | 10.9% | 14.3% | 13.1% | 16.0% | 14.8% |
| Median Home Value | $37,704 | $40,427 | $65,787 | $70,399 | N/A | N/A | N/A | N/A |
| | | | | | | | | |
| Average HH Income | $18,757 | $20,128 | $38,809 | $36,239 | $47,975 | $42,983 | $49,980 | $45,425 |
| Median HH Income | $14,508 | $15,817 | $27,391 | $29,132 | $30,469 | $32,347 | $31,837 | $34,047 |
| Per Capita Income | $7,919 | $8,370 | $16,274 | $15,289 | $21,325 | $18,147 | $22,274 | $19,224 |
| | | | | | | | | |
| Employment | N/A | N/A | N/A | N/A | 497 | 1,725 | N/A | N/A |
| Establishments | N/A | N/A | N/A | N/A | 65 | 214 | N/A | N/A |

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## D. TOLEDO

A round table discussion was conducted with a group of community development and transportation leaders organized by The Toledo Port Authority on November 3, 2006 at the Toledo Amtrak Station on Emerald Avenue. The community roundtable provided important insights into the prospects for passenger rail services, local economic development impacts of the proposed rail system, and the development potential of the area near the station site. The roundtables served as a qualitative assessment and independent "check" of the accuracy of projections made by TEMS.

### 1. Findings Regarding Passenger Service

The first set of issues focused on likely ridership. The forecast number for daily boarding was 1,679 in 2010 and is expected to increase to 2,407, daily, by 2049. These station volumes are significantly above the number of current Amtrak passengers; estimated at roughly 200 per day. After asking some questions about the methodology used in deriving the ridership estimate, the roundtable considered the forecast within bounds. Several points supporting the idea that ridership would be substantial included:

1. The large, current volume of automobile traffic implies substantial need to travel.

2. The quantity and quality of current rail service is inadequate to support a large number of potential riders. The critique of existing services suggested that the current rail ridership is not a good indicator of the number of riders that could be anticipated in a more comprehensive rail system with high quality service.

3. The anticipated high quality and dependability of the Ohio Hub will encourage riders. Complete responses to a questionnaire administered to the participants at the end of the roundtable are shown in Appendix 5.D.

Mornings and evenings during the days were anticipated to be the peak travel times. The principal users were anticipated to be business service providers. A significant use for sporting events, pleasure (such as tourism), students, and convention related travel were identified. See questionnaire responses 4 and 5 and 6.

The ability to use the rail system for connection to the Detroit Airport was also widely discussed. The connection to Detroit highlighted the importance of a multi-state rail system and inter-modal connectivity. The idea of "seamless" connectivity was mentioned, suggesting that a passenger might be able to board at Toledo and easily catch a flight out of Detroit or vice-versa without extra baggage handling or check in inconveniences.

Use of the inter city rail system for daily or "regular" commuting was anticipated to be modest.

The "Mega-Bus" service was considered a potential competitor for passenger rail. The Mega-Bus is an express bus designed to connect major cities and provide passengers with greater comfort than is the case with traditional bus service. One or two participants felt that an express bus which stops in Toledo would be competitive for the Cleveland/Toledo segment and perhaps the Toledo/Chicago segment. However, others disagreed, pointing to the greater comfort of passenger rail. One participant pointed out that in several markets, the Mega-Bus concept was not profitable. As a point of comparison, currently the mega-Bus departs from Toledo at 2:15 PM and arrives at Cleveland at 4:15 PM. The cost for 1 seat one way is $10.00.

The discussion emphasized that success in attracting passengers will depend heavily upon frequency of stops and perhaps more importantly, dependability of the service. Substantial comments were made about the extreme unreliability of current rail service to the area. Current Amtrak operations were severely criticized. The lack of reliability was seen as a potential barrier to the success of the Ohio HUB because it has given rail service a bad reputation. In order to overcome this "stigma", the Ohio Hub may need an advertising or marketing campaign to develop a ridership base. Some participants suggested the focus of the campaign should be on young people who have values that currently may not favor train travel. People were considered to be more train friendly in the eastern United States where they have more experience.

There was disagreement regarding whether or not rail travel would appeal to an aging population. Some participants suggested that older people would eschew train travel because it involved lugging suitcases and climbing stairs. While others felt it would be important for older citizens to have alternatives to the car. The potential problem with the older demographic could be addressed by services offered at stations.

Why would potential passengers shift towards rail and away from the automobile? According to the tabulated responses, time savings, out-of-pocket costs savings, and congestion avoidance were the most prominent reasons. The least important reason was “wear and tear of car”. See question #8. The responses suggest a potential conflict: passenger rail is considered cost competitive with automobile only if the full cost of automobile travel is included. Yet the full cost of automobile travel was not considered an important cost consideration.

Another significant passenger segment for a rail system was termed by participants as “productivity” riders: persons desiring a good work environment while on the train. Question 15 indicated that rail would be used frequently for business travel.

The Toledo focus group was very supportive of high speed passenger rail service. The strong consensus was that it could be a successful enterprise and generate passengers in the range of the TEMS estimates if: it was 1) developed properly, 2) marketed creatively and to the right demographic cohorts, and 3) operated in a dependable, high quality manner.

### 2. Findings Regarding Economic Growth

A second area of discussion for the roundtable concerned the potential for economic development. For purposes of this report, economic development requires economic growth in the entire region not just near the station. If development near the station occurred without a net gain in regional output and employment in the region, only spatial rearrangement would occur. For instance, an establishment might move from one area of the community to another. Spatial rearrangement only was not considered economic growth for purposes of this report.

The consensus of the community round table was that improved rail transportation would provide an economic stimulus for the entire area. All of the respondents believed that the rail system would make a “very positive” or “somewhat positive” contribution to the regional economy. Similarly, the questionnaire indicated that the respondents rated economic development impacts as 7.25 on a ten point scale (see question 17 in Appendix 5.D.).

Economic benefits to the Toledo area can be divided into benefits that will accrue due to better ability to move people and better ability to move freight.

Movement of people will enhance the productivity of service oriented enterprises such as professional services, tourism and so forth. Better movement of freight may benefit extractive, agricultural and manufacturing efforts.
Passenger rail has the potential to improve fright service because of improvement in the tracks and switching technology that will be made simultaneously with the passenger rail improvements.

An examination of the area's economic structure suggests industries that might benefit from improved freight transportation. Locations quotients are a tool used to addressed potential economic development impacts. Table V.7 shows sectors in which Toledo MSA counties have location quotients of two or greater. High location quotients in transportation sensitive industries that will benefit from improved rail service indicate potentially large community economic benefits.

In terms of movement of goods, the location quotient analysis indicated several industries with high potential benefits. The high location quotients for metals and related manufacturing sectors suggest that the area will benefits from improvements in the ability to transport goods.

**Table V.7 Sub-sectors with High Location Quotients for Toledo by County and Industry**

| **Toledo Area Counties** | **Fulton** | **Lucas** | **Ottawa** | **Wood** |
|---|---|---|---|---|
| **NAICS Industry↓** | | | | |
| 212 Mining oil, gas | | | 5.86 | |
| 311Food manufacturing | 2.44 | | | 4.74 |
| 326 Plastics, Rubber manufacturing | 6.73 | 4.3 | 11.17 | |
| 331 Primary metal manufacturing | 10.34 | | | |
| 332 Fabricated metal manufacturing | 4.21 | 2.6 | 2.2 | |
| 333 Machinery manufacturing | | 2.6 | | 4.99 |
| 337 Transportation equip manufacturing | 4.97 | 2.99 | | |
| 484 Truck transportation | | | | 2.67 |
| 487 Scenic and sight seeing transportation | | | 3.3 | |
| 624 Nursing and residential care | | | 2.34 | |
| 712 Museums, historic sites, zoos, and parks | 4.18 | 4.77 | | |
| 713 Amusements, gambling and recreation | | | 3.27 | |

*Location quotients reflect the percentage of local employment compared to the comparable percentage nationally. A location quotient greater than 2 means the county has twice the percentage of employment as the nation. High location quotients indicate a relatively greater local importance than nationally.*

*Source:*

The Toledo area already has strength in cargo services. Four major freight railroads move products through the region. There are several rail yards with equipment to load petroleum products, automotive parts, completed cars, and food products.
Toledo ranks as one of the busiest freight rail points in the United States (according to the Lucas County Port Authority. There was also a relatively high location quotient for warehousing and storage, particularly for Wood County. Lucas County is also one of the major trucking counties in Ohio in terms of truck traffic volume, suggesting that there is significant potential for replacement of highway use for rail use.

Experts at the roundtable felt that easier movement of people to and from Toledo will help attract back office employment from Detroit and Chicago. The attraction of back office and other activity associated with Detroit and Chicago appeared to be a development path that local economic development planners had already considered. Thus, the strengthening of linkages with these places was viewed very favorably. The development of rail transportation along the lines of the mid-west regional rail system appears to fit well with current economic development strategies in Toledo. When asked about likely use of passenger rail, corporate use was most frequently mentioned followed closely by government travel (questions 6 and 7 in appendix 5.D.)

The community survey also indicated substantial potential for the rail system to benefit tourism and retail sectors. The analysis of location quotients indicated that activities in the retail sector appear to be about 1 (not shown in Table V.1), so the prospects that the rail proposed rail system will benefit the retail sector is not based on current strengths in that area. Similarly, the roundtable responses to the questionnaire indicated that shopping was not one of the main reasons folks traveled to the area.

The overall location quotient for “Museums, Historical Sites, Zoos, and Parks” was over four, suggesting that there is potential to increase tourism. Similarly, Ottawa County has significantly large location quotients in Amusements, Gambling and Recreation. However, related services such as accommodations did not have a correspondingly high location quotient suggesting that a disproportionate number of overnight stays do not accompany the large number of employees in museums and related services. Accordingly, the area may have potential to strengthen further the tourism/convention agglomeration. If so, a passenger rail system will contribute to that potential. One member of the roundtable specifically mentioned that a rail system would be used by convention visitors.

The community roundtable participants believed that a passenger rail system would contribute to economic development by enhancing the competitiveness of firms that rely on face-to-face communications with persons outside the area. A traditional economic argument is that while advances in communications have made personal access less important in some circumstances, face to face meetings continue to be important. For instance, some sales can be best finalized in person. The hand shake is still important. The analysis of location quotients in areas associated with business services indicated that benefits to that sector would be proportional to what would be expected elsewhere in the nation.

With regard to the overall question of whether a high speed passenger rail system will enhance economic development in the region as a whole, the evidence suggests that in the case of Toledo, substantial benefits may accrue to the manufacturing sector due to improvements to the freight system. Tourism and convention services are likely to experience growth due to the passenger improvements.

## 3. Findings Regarding Site Development

The area near the likely station is well suited for transportation-oriented development. Currently the site is underdeveloped. There are some manufacturing, hauling facilities, and restaurants in the area, but there are ample amounts of vacant land and some notable underutilized or vacant buildings. Competing land use development plans do not appear to be impediments to transportation oriented development. See the map and aerial photograph in Section V of this report.

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Table V.8 provides a summary of important statistics. A statistical housing and demographic survey indicates that the residential population density is low. There are about 469 persons living within a ¼ mile radius of the station site and only 2,718 with and half-mile radius. Employment levels are also low in light of the area's proximity to the downtown. The employment base appears to be in lower paid service occupations and material handling.

**Table V.8 Demographic Profile for the 1/4 and 1/2 Mile Radii Around the Station Stop in Toledo**

| Toledo, | 1990 | | 2000 | | 2006 | | 2011 | |
|---|---|---|---|---|---|---|---|---|
| Ohio | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile | 1/4 mile | 1/2 mile |
| Total Population | 552 | 3,271 | 490 | 2,850 | 469 | 2,718 | 454 | 2,619 |
| Total Households | 193 | 1,054 | 177 | 945 | 169 | 898 | 163 | 863 |
| | | | | | | | | |
| Housing units | 238 | 1,261 | 214 | 1,136 | 217 | 1,144 | 219 | 1,151 |
| Owner Occupied | 38.4% | 40.3% | 36.4% | 37.6% | 35.1% | 36.1% | 33.8% | 34.9% |
| Renter Occupied | 42.8% | 43.3% | 46.2% | 45.5% | 42.9% | 42.4% | 40.6% | 40.0% |
| Vacant | 18.9% | 16.4% | 17.4% | 16.8% | 22.0% | 21.5% | 25.5% | 25.0% |
| Median Home Value | $17,962 | $20,221 | $29,268 | $27,186 | N/A | N/A | N/A | N/A |
| | | | | | | | | |
| Average HH Income | $18,772 | $20,572 | $26,509 | $28,555 | $37,428 | $36,781 | $38,794 | $38,592 |
| Median HH Income | $14,610 | $15,857 | $21,957 | $22,804 | $23,979 | $25,030 | $25,690 | $26,748 |
| Per Capita Income | $6,386 | $6,903 | $9,576 | $9,468 | $14,591 | $13,967 | $15,515 | $14,884 |
| | | | | | | | | |
| Employment | N/A | N/A | N/A | N/A | 710 | 2,614 | N/A | N/A |
| Establishments | N/A | N/A | N/A | N/A | 31 | 124 | N/A | N/A |

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Based on both observation of the area and trends in the data, the area has declined. A comparison of years 2000 and 1990 indicates that population is falling. The area has a 35.1 % owner occupancy rate, which is low in light of the fact that the housing stock is primarily housing that was built for single-family residency.

The 2006 owner occupancy rate is slightly down from 1990 and 2000. The vacancy rate is also high. In 2000, there were 85 vacant units within the ¼ mile radius based on a total of only 490 housing units.

Median household income was $21,957 in the ¼ mile radius in 2000, up only about 30% from 1990. The low income is also evident in the ½ mile radius, which is slightly above the area immediate to the station. The median value of owner occupied housing in the immediate area was $29,698 in 2000. As with income, the 2000 housing value was above the 1990 median, but low for the Toledo market, suggesting a housing market that is not keeping pace with the region.

The demographic picture that emerged is of an area that is in need of redevelopment. Particularly in light of the areas proximity to the Toledo Central Business District, the area has significant development potential. Currently, however, there are few signs of redevelopment. There is potential that the blight may spread to other parts of the city including the downtown.

Will the emergence of passenger rail as an influence on land use crowd-out other land uses? Currently there is ample unused capacity, so the concern is not immediate. The problem of protecting poor households from dislocations is manageable because of the significant current underutilization of property in comparison to the existing number of residents.

There are not a lot of businesses in the area around the station stop. The largest employer is manufacturing followed by transportation and communications. This employment pattern suggests potential economic development due to improved rail freight service. The presence of a postal facility is also note worthy. There are several restaurants in the area proximate area and few retail other retail establishments.

The evaluation did not indicate major barriers to transportation oriented deployment. The additional development generated by the rail system is likely to strengthen an area in need of economic stimulation. Because of the nature of the area, much of the regional growth that better rail service may create is likely to locate near the station.

## E. THE COMBINED RESULTS OF THE LOCAL MEETINGS

While there were similarities among the viewpoints of representatives in the four cities in which meetings were held. There are also dissimilarities among the communities. In addition, there are some observations regarding the collective perceptions from the local communities that should assist the Ohio Rail Development Commission as it moves the plan forward toward construction. The compiled results of questionnaires completed by attendees at all of the local meetings is included in Appendix 5.E. for reference.

### 1. Findings Regarding Passenger Service

Among all of the community groups convened for local input, the most frequently cited purpose for traveling via high-speed rail was for regular business meetings. Following business meetings, in declining order of frequency were “pleasure”, “commuting”, “sporting events” and “shopping” as reasons for using the rail service.

Among most likely destinations, Columbus was the most frequently mentioned city, followed by Cleveland. Out-of-state destinations were actually mentioned more frequently than Cincinnati as a destination and Dayton was only mentioned by two respondents as a destination.

Among the reasons for rail travel, business was the most frequently cited reason with sporting events second in order of frequency. Conventions, tourism, and shopping, in declining order of frequency, were the next most frequently cited reasons for rail travel.

Over seventy-five percent (75%) of respondents indicated they thought face-to-face communication was either “important” or “very important” to business. When asked about the importance of face-to-face communications between distant locations, the majority of respondents thought it was “somewhat important” to “important”. Over sixty percent (60%) of respondents indicated they thought face-to-face communications were becoming less important to business.

Among the groups interviewed, over sixty percent (60%) of respondents thought that weekday travel was the most important timeframe for regular high-speed rail service with almost two-thirds of respondents citing “mornings” as the most important time of day for regular travel. Weekend travel was cited as a secondary timeframe of interest with holidays ranked as relatively unimportant. During the day, evenings were the second most important time of day for travel and late nights were relatively unimportant (many respondents did not even indicate a ranking of importance for late nights).

In declining order of importance, corporations, government workers, service providers, professional practices, and educators were identified as the most likely categories of employment to use the high-speed rail service.

Among the types of people to use the Ohio Hub, pleasure travelers were the most frequently identified, followed, in declining order, by employees, students and executives, equally, and sports fans.

Among the most frequently cited reasons for switching to rail as a mode of travel were time savings (1), ability to do work while traveling (2), out-of-pocket cost savings (3), congestion avoidance (4), and convenience to destination (5).

Over two-thirds of respondents felt the number of projected arrivals and departures each day were reasonably accurate for their communities.

For those who did not feel the number of arrivals and departures were accurate, over two-thirds felt the projected numbers were too low.

Over two thirds of respondents thought it would be “likely” to “very likely” that the Ohio Hub would be used for business. The overall opinion regarding personal use was not as overwhelmingly positive, but was still skewed to the positive side of the scale. Over sixty percent of respondents felt it was between “somewhat likely and “very likely” that the rail would be used for regular commuting. The respondents were divided on their impressions of system use for trips to the airport(s).

The frequency with which commuting is cited as a reason to travel by rail strongly suggests that the respondents in the local meetings may be unclear as to the differences between “commuter rail” and “high-speed intercity rail” or that the members of the local communities are suggesting a commuter role for the Ohio Hub.

## 2. Findings Regarding Regional Economic Development

In general, the combined results, from all of the groups, indicate most local officials and business leaders have a positive impression regarding the potential of the Ohio Hub to leverage economic development in the various communities. All respondents indicated that high-speed rail would generate economic development opportunities in their communities. Ninety percent of respondents ranked the likely impacts of high-speed rail on their communities as “somewhat positive” to “very positive”.

Among segments of the economy that would be the most likely to benefit from high-speed rail, office based growth was cited most frequently by approximately 85% of respondents. Retail and residential growth were also cited, in declining order of frequency. The numbers of respondents indicating either retail or residential growth were substantially fewer than those indicating office growth.

Seventy-five percent of respondents felt that near-by businesses would benefit from a local station stop.

## 3. Findings Regarding Site Development

In general the responses regarding economic development were positive. The local groups were not asked many questions regarding the development potential of the proposed station stop locations, but some findings did emerge, nevertheless.

Over half of all respondents felt that transportation oriented development was either “likely” or “very likely” to occur near the local station stops. Slightly less than twenty-five percent of respondents felt transportation oriented development was “possible” and the remainder of respondents (less than twenty-five percent) felt that transportation oriented development was either “unlikely” or “very unlikely” to occur.

As cited above, office and retail growth were both cited as commercial land uses having development potential as a result of the Ohio Hub. Additionally, residential uses were cited as having development potential as a function of high-speed rail.

Support for nearby businesses was frequently mentioned by group meeting attendees, providing some idea of the proximity that development could have in relationship to the local station stops.