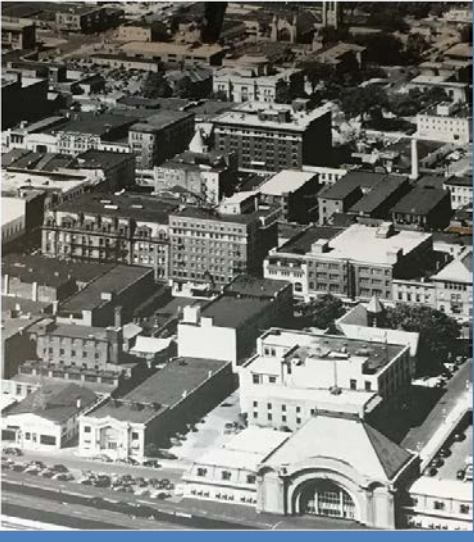


CONNECT CLARK COUNTY *Economic Baseline Analysis & Target Industry Assessment*



*Submitted to Planning-Next on behalf of
Clark County Government
May 27, 2017*

Randall Gross / Development Economics

INTRODUCTION

This report provides a summary of findings from a Baseline Economic Analysis as well as a Target Industry Assessment for Clark County, as input to the comprehensive planning effort, Connect Clark County. The Baseline Economic Analysis examined existing economic conditions and trends, along with real existing estate markets, and identifies key drivers and assets, strengths and weaknesses. Input from stakeholders was also gathered through an “Economic Visioning” session held with members of the business community. The Target Industry Assessment determined the county’s competitive advantages within specific industry sectors, examined growth potential, and identified opportunities for target business recruitment and development. Based on these findings, strategic recommendations will be made later as input to the plan on economic development, branding & identity, business recruitment and quality of life factors.

Section 1. BASELINE ECONOMIC ANALYSIS

An Economic Base Analysis was conducted to assess the existing economic context and to examine key trends in employment and industry performance. A brief review of demographic trends is provided as background in support of the economic analysis. Trends in labor force, employment, commutation and other factors were also assessed in order to develop an understanding of underlying economic strengths, weaknesses and change. These assessments were confirmed or refined through discussions with stakeholders including major employers, real estate professionals and others in the Clark County area.



Regional Context: Demographics

Clark County forms the Springfield Metropolitan Area, which has an estimated (2016) population of 134,786. Unlike most other metropolitan regions, even within America's "Rust Belt," Springfield has continued to decline in population, falling 2.6% since 2010. Clark County also forms part of the larger Dayton-Springfield Consolidated Metropolitan Area (CSA), with an estimated population of 1,074,617. This larger region's population base has also continued to fall, by 0.6% since 2010. Because Clark County's population is declining at a faster rate than the rest of the Dayton-Springfield CSA, its share of the region's population has fallen from 12.8% to 12.5% since 2010.



Census Bureau map showing Dayton-Springfield CSA and its component counties

Adjoining the Dayton-Springfield CSA is the Cincinnati Metro Area, which is growing (albeit at a relatively slow rate) in population. While these metropolitan areas share proximity and some cross-commutation, it does not appear that they will be merged for statistical purposes anytime soon. As such, Clark County remains for now within a statistically-declining metro that is more difficult to market for business recruitment purposes.

Detailed Demographic Trends

Declining population, household base, and income levels impacts on the market for local housing, retail goods and services in Clark County.

Table 1. KEY DEMOGRAPHIC TRENDS, CLARK COUNTY, 2000-2015/16					
Factor	2000	2010	2015/16	2000-2015/16 Change	
				Number	Percent
Population	144,742	138,333	134,786	(9,956)	-6.9%
Springfield	65,358	60,608	59,680	(5,678)	-8.7%
Remainder	79,384	77,725	75,106	(4,278)	-5.4%
Households	56,648	55,244	54,809	(1,839)	-3.2%
Springfield	26,254	24,459	24,558	(1,696)	-6.5%
Remainder	30,394	30,785	30,251	(143)	-0.5%
HH Income	\$ 56,106	\$ 48,472	\$ 43,625	(12,481)	-22.2%
Springfield	\$ 44,775	\$ 37,385	\$ 32,066	(12,709)	-28.4%
Remainder	\$ 65,893	\$ 57,281	\$ 53,009	(12,885)	-19.6%
Notes:	Census estimates 2016 for County, 2015 for other areas. Income is expressed in constant 2016 dollars.				
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Population. Between 2000 and 2016, Clark County’s population fell by nearly 10,000 or 6.9%. The rate of population decrease has remained fairly constant over that period, with losses of about 0.4% per year between 2000 and 2010, and 0.4% per year between 2010 and 2016.

However, trends within the county are shifting. The rate of Springfield’s population decrease is slowing while those outside of the city are accelerating. Between 2000 and 2010, Springfield’s population fell by 0.7% per year and population in the rest of Clark County fell by 0.2% per year. However, since 2010, Springfield’s population has fallen by 0.3% per year while that of the remainder fell by 0.7% per year. Either way, population has continued falling, but Springfield’s relative position in the county seems to be recovering somewhat. Today, the city of Springfield accounts for 44% of the county’s total population base.

Households. This shift is even more striking within the household base. Overall, the county’s household base fell by 3.2% between 2000 and 2016, representing a loss of about 1,800 households. Springfield’s households fell by

0.7% per year on average between 2000 and 2010. However, the city's household base actually increased between 2010 and 2015, adding about 100 households or 0.1%. This is the one bright spot in an otherwise negative demographic picture.

While Springfield's household base started to increase after 2010, the remainder of the county lost 534 households or an average of about 0.3% per year. This data seem to suggest that while more rural areas of the county continue their slide, Clark County's largest city appears to be stabilizing.

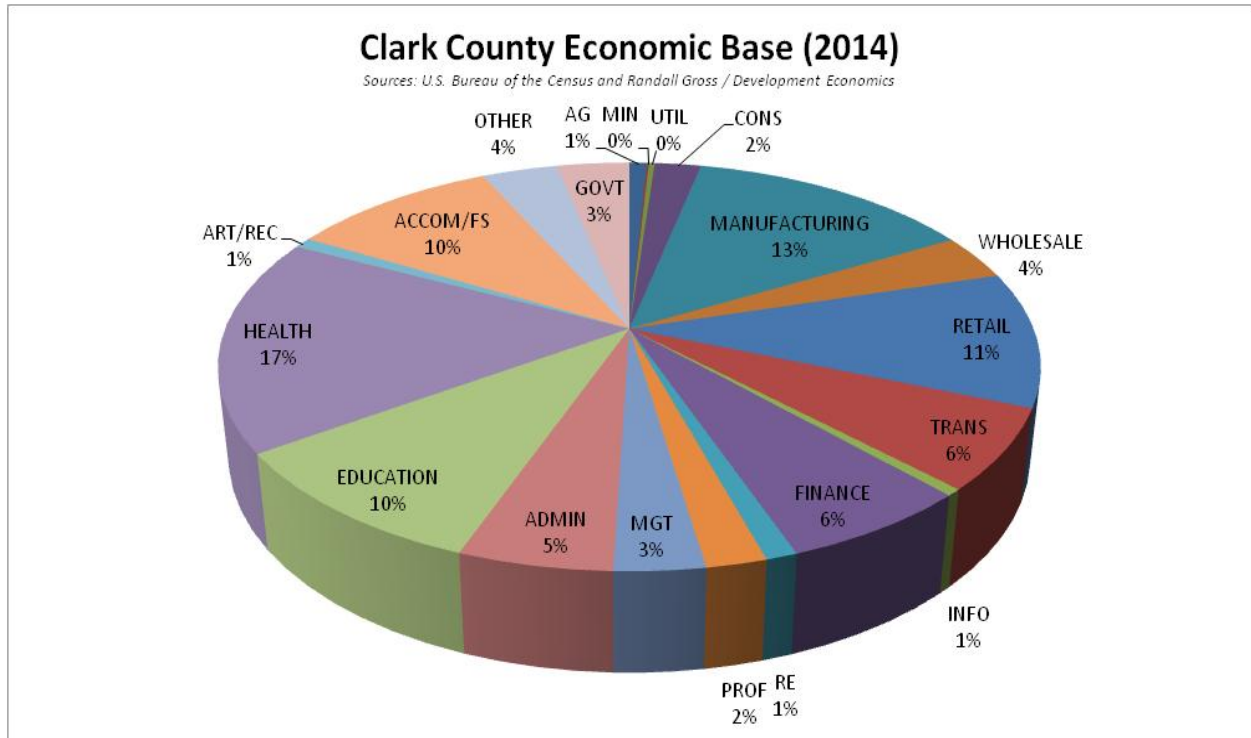
Income. Household incomes have also been declining throughout the county, even after the end of the national recession. This trend is not a good sign for Clark County's economic sustainability and prosperity. Since 2000, Clark County household incomes have fallen by more than 22% in constant dollar terms (after accounting for inflation). Incomes have fallen at a faster rate in Springfield than they have in the rest of the county. Since 2000, Springfield incomes have fallen by 28.4% while incomes in the rest of Clark County fell by 19.6%. Again, these calculations are made in constant dollar terms, meaning that they account for the effects of inflation.

Surprisingly, incomes have fallen at a faster rate since 2010 and the end of the recession. Between 2000 and 2010, household incomes fell by 1.4% per year, but since 2010, they have fallen by 1.7% per year. This trend has accelerated at an even faster rate within Springfield, where incomes fell by 1.7% per year between 2000 and 2010, but by 2.8% per year since then.

Economic Base

Clark County's economy comprises a fairly diverse mix of industry sectors, but there are certain concentrations of employment in health care (17%), manufacturing (13%), retail trade (11%), education (10%), and accommodation & foodservice (10%). Most other sectors are well-represented, although there is negligible employment in mining and utilities. Information services, agriculture, real estate, and arts & entertainment each represent only 1% of county employment; while construction and professional & technical services each represent only 2%.

Chart 1



Selected Sectors & Major Employers

Several key sectors in the Clark County economy are discussed below, in terms of the county’s major employers and the types of economic activities in which they are engaged.

Agriculture. Clark County is among the top half of agricultural producers among counties in the state of Ohio. In 2016, the county was part of the West Central Agricultural Region and produced 10.1 million bushels of corn (24th out of 82 reporting counties), 3.92 million bushels of soybean (36th), 216,000 bushels of winter wheat (49th), and 9,200 tons of alfalfa (31st). Despite its production levels, only about 400 people are employed full-time in agriculture and forestry-related businesses in Clark County. There may be others employed in value-added agricultural production, agricultural supply, or transportation of agricultural products, but these workers would be included in manufacturing, wholesale and retail trade, or transportation services, respectively.¹

Manufacturing & Distribution. Clark County has a substantial manufacturing base, employing some 6,700 people. Another 3,200 people work in transportation services (e.g., trucking and warehousing) and 1,800 in wholesale trade. Among the larger employers are Dole Fresh Vegetables (fruit & vegetable packaging), TAC Industries (hydroponic produce, textile products), Gordon Food Services (foodservice distribution center), Reiter Dairy (milk), Yamada North

¹ USDA, National Agriculture Statistics Service, Ohio County Estimates 2016-2017.
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 AFRICA: African Development Economic Consultants (ADEC). 27-11-728-1965. Fax 728-8371. Randall@ADEC1.com
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America (auto parts), Buckeye Resources (horticultural products), Bob Evans (sausages), Navistar (vans), and others. Businesses like Young's Jersey Dairy comprise 320 employees working in cross-sector activities including manufacturing (dairy products, cheese), agriculture (farming), accommodation & foodservice (restaurant/inn), and entertainment (recreation/entertainment uses). Eby-Brown is a regional distributor of tobacco, candy, and convenience goods with facilities in Springfield. Bell Nursery operates both a greenhouse and distribution center in Springfield. A key theme among these large companies is their link to either the food industries or transportation equipment manufacturing.

Management, Administrative & Financial Services. There are about 1,500 people employed in management services in Clark County. The county is headquarters for several companies, most notably Speedway, which has its corporate offices in Enon. Speedway is a wholly-owned subsidiary of Marathon Petroleum. The chain operates more than 2,800 stores throughout the Midwest, East Coast, and increasingly, the South. There are another 2,500 people employed in administrative services industries in the county. Assurant Specialty Property is a property insurance-related business owned by New York-based holding company Assurant. The Springfield office provides customer support services for the company.

About 3,700 people are employed in finance, insurance and real estate in Clark County. Security National Bank, headquartered in Springfield, is part of the Newark (OH)-based Park National Family of (11) Community Banks that serve customers in 29 counties in southwest and central Ohio. Security National Bank has 14 offices located in Springfield (6), Enon (1), Medway (1), New Carlisle (2), South Charleston (1), Urbana (2), and Mechanicsburg (1), plus six ATM-only locations.

Health Care. Nearly 8,500 people are employed in health care and social assistance in Clark County. The county is or has been home to several large health care providers. AdCare Health Systems is a self-managed health care real estate company that was formerly based in Springfield but has since relocated its headquarters to Suwanee, Georgia. The company manages six nursing care facilities in southwest Ohio. Springfield-based Community Mercy Health Partners is among the largest non-profit healthcare systems in Ohio. The non-profit operates two hospitals (Springfield Regional Medical Center and Mercy Memorial Hospital) as well as individual medical offices and clinics throughout the area.

At-Place Employment Trends

Clark County had a total of nearly 50,000 jobs in 2014. Overall, the national recession impacted negatively on the county's economy, with a loss of 6,370 jobs (12.1%) between 2002 and 2010. The local economy is still in recovery, with about 3,000 jobs gained back since 2010, representing a 6.5% increase. Overall, the

county's employment base had not yet reached pre-recession levels and was still down by 6.8% (3,370 jobs) by 2014.

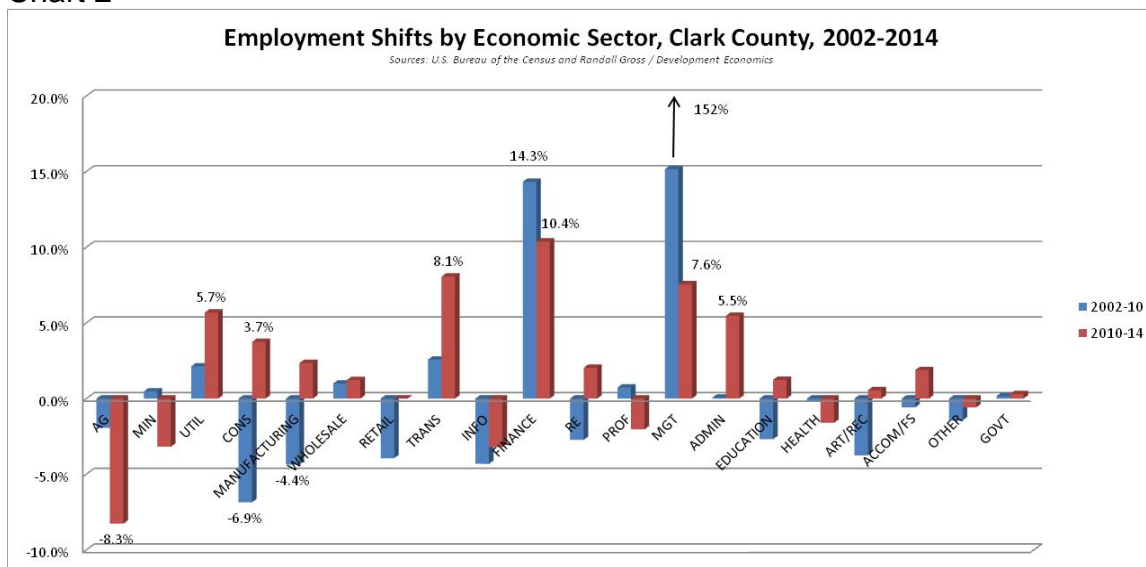
Table 2. AT-PLACE EMPLOYMENT TRENDS, CLARK COUNTY, 2002-2014					
Industry	2002	2010	2014	2002-2014 Change	
				Number	Percent
Ag/Forestry	719	608	407	(312)	-76.7%
Mining	53	55	48	(5)	-10.4%
Utilities	94	110	135	41	30.4%
Construction	2,070	935	1,075	(995)	-92.6%
Manufacturing	9,360	6,094	6,666	(2,694)	-40.4%
Wholesale	1,571	1,696	1,779	208	11.7%
Retail	7,741	5,300	5,299	(2,442)	-46.1%
Transportation	1,982	2,390	3,161	1,179	37.3%
Information	452	296	258	(194)	-75.2%
Finance	1,047	2,247	3,180	2,133	67.1%
Real Estate	613	479	518	(95)	-18.3%
Prof/Tech Services	1,022	1,082	994	(28)	-2.8%
Management	87	1,142	1,487	1,400	94.1%
Admin	2,072	2,082	2,537	465	18.3%
Education	5,842	4,588	4,816	(1,026)	-21.3%
Health	9,170	9,023	8,445	(725)	-8.6%
Arts/Entertainment/Recreation	580	406	415	(165)	-39.8%
Accommodation/Foodservice	4,707	4,490	4,828	121	2.5%
Other	2,039	1,803	1,761	(278)	-15.8%
Government	1,650	1,671	1,691	41	2.4%
TOTAL	52,871	46,497	49,500	(3,371)	-6.8%
2010-2014				3,003	6.5%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Growth and decline were uneven among Clark County's economic sectors between 2002 and 2014. Overall, the biggest decreases were in the manufacturing sector (-2,700 jobs or -40.4%), retail trade (-2,400 jobs -46.1%), and education services (-1,030 jobs or -21.3%). Several sectors added jobs, such as finance & insurance (+2,100 or +67.1%), management services (+1,400, 94.1%), and transportation services (1,200, 37.3%).

Several sectors seeing consistent growth over the full length of the 12-year period included finance & insurance, management services (mainly at Speedway), transportation services, and administrative services. Sectors that saw consistent declines in employment over the 12-year period included retail trade, health care, and personal & other services. Importantly, the sectors that shown consistent employment decreases were those that are most dependent on the local market, such as retail trade, health care and personal services. Thus, it appears that a declining population has led directly to decreases in employment.

As illustrated below, major shifts have occurred in the county’s economy between 2002 and 2014.

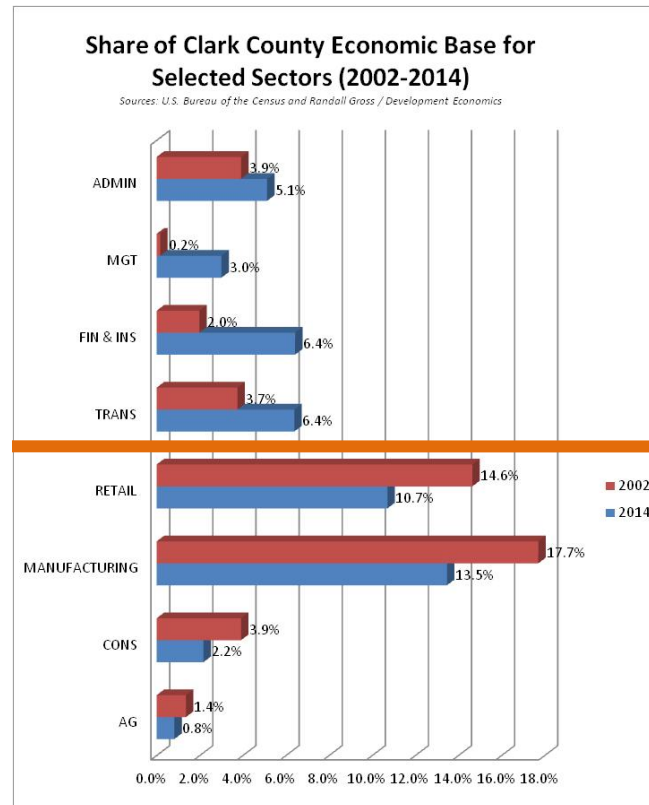
Chart 2



The local economy has shifted from production sectors like agriculture and manufacturing to finance, management, transportation and administrative services. While manufacturing has seen some positive growth since 2010, it has not been enough to compensate for the losses in employment that occurred prior to and during the recession of 2008-09. Meanwhile, banks and service companies like Speedway have consolidated administrative functions in the area.

The following chart further illustrates the shift underway in the local economy, sectors having a growing share of the economic base above the line and those having a declining share below the line. Those with an increasing share include administration, management, finance & insurance, and transportation services. Those with a declining share include retail trade, manufacturing, construction, and agriculture.

Chart 3



The red bars on the chart indicate share of total Clark County employment by sector in 2002, while the blue bars indicate shares for those same sectors in 2014. Despite the shifts, manufacturing and retail trade continue to dominate the employment base.

Labor Force and Employment Base

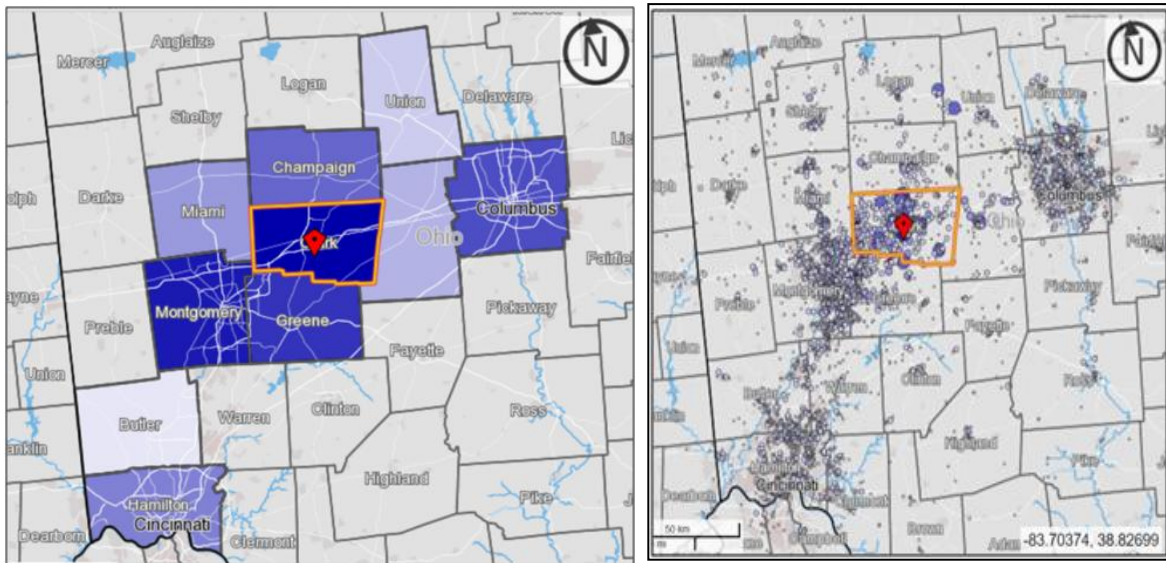
Clark County had about 65,840 people that were either employed or looking and eligible for work in 2015. This number was down by 2,780 or 4.1% from just five years earlier in 2010. While the size of the labor force has declined precipitously, so has unemployment. The County’s unemployment rate was 4.1% in April 2017 (not seasonally adjusted), equal to that of the U.S. as a whole and lower than the Ohio rate of 4.4%. Clark has the 33rd lowest unemployment rate among the state’s 88 counties and is part of the swath of counties in the west-central part of the state that comprise the lowest unemployment rates. In Ohio, unemployment is now concentrated in the western third of the state including much of the Appalachian region and heavily-industrialized northeast Ohio. While the low unemployment rate is good news, it can also be an indication of out-migration in the labor force when people have trouble finding jobs.

Commutation Patterns

Clark County is part of a broader consolidated metropolitan area, so it is helpful to understand commutation patterns among Clark County residents and workers. Those commutation patterns are analyzed below.

Place of Work. Residents of Clark County work throughout the region. Large numbers of Clark County residents commute out of the county to work in Dayton/Montgomery County as well as Greene and other surrounding counties.

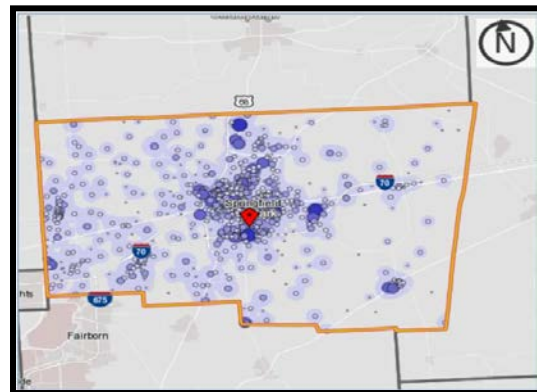
Where Clark County Residents Work:



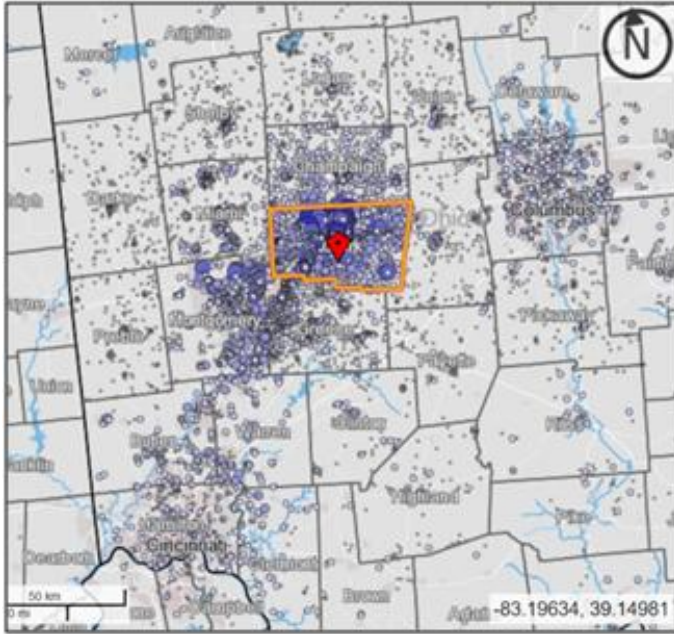
Source: U.S. Bureau of the Census

Surprisingly, a large share also commutes out to Franklin County (Columbus) and, to a lesser extent, Hamilton County (Cincinnati). In general, the county’s residents work within a geographic arc formed by I-70/I-75 from Columbus to Cincinnati, as shown on the maps above.

Most of the jobs in Clark County are concentrated in and around Springfield, as shown to the right. However, there are small numbers of jobs scattered throughout the western half of the county and along several corridors headed east.



Place of Residence. Less than one-third (32% or 25,600) of the county's workers live and work within Clark County itself. About 38% (30,600) of Clark County workers commute out to work in another county. Finally, about 30% (23,900) of Clark County workers commute in from outside of Clark County.



The map at left shows where Clark County workers live. In other words, this map illustrates the “Commuter-shed” for Clark County businesses and government employers.

About 48% of Clark County workers live within 10 miles of the county. However, another 22% live 10 to 25 miles away, and 30% live more than 25 miles away.

As with the jobs that attract Clark County residents for work, the county's labor force is

generated from within an arc extending from Columbus to Cincinnati along I-70 and I-75.

While the county's labor force has fallen by more than 4.0% since 2010, the county's overall “Commuter-shed” of **1.9 million workers** has **increased by 1.2%** since 2010. That increase represents a gain of about 22,000 workers in five years. Much of this growth has been led by Franklin, Warren, and Greene counties. Franklin County's labor force alone increased by nearly 6.0% since 2010, and added 36,000 workers.

This sizeable labor force and its growing number provides an available workforce for business and industry development in Clark County. In marketing to attract industry, it is worthwhile to note Clark County's positioning within this growing regional labor market, instead of dwelling on the shrinking local base. Overall labor force trends within the Clark County Commuter-shed are summarized below for 2010 to 2015, by each of the individual counties.

Table 3. LABOR FORCE TRENDS, CLARK COUNTY COMMUTERSHED, 2010-2015				
County	2010	2015	Change 2010-2015	
			Number	Percent
Clark	68,619	65,840	(2,780)	-4.1%
Montgomery	271,805	263,130	(8,675)	-3.2%
Greene	81,900	84,962	3,062	3.7%
Champaign	20,293	20,048	(245)	-1.2%
Franklin	626,647	663,579	36,932	5.9%
Miami	53,021	53,321	300	0.6%
Hamilton	419,050	420,738	1,688	0.4%
Butler	188,458	176,850	(11,608)	-6.2%
Warren	107,650	112,468	4,817	4.5%
Madison	20,157	19,812	(345)	-1.7%
Logan	23,767	22,497	(1,270)	-5.3%
TOTAL	1,881,368	1,903,245	21,878	1.2%
Sources:	U.S. Bureau of the Census and Randall Gross/ Development Economics.			

Existing Real Estate Market Conditions

A review of existing real estate market conditions was undertaken in order to provide additional context for target industrial recruitment and economic development. This review does not constitute a “market analysis” nor forecast the demand or the potential for use and development. Rather, it provides a baseline understanding of existing conditions. In most cases, especially office, retail/commercial and industrial markets, there is no entity tracking Clark County market conditions, in terms of total inventory, occupancy and vacancy, rents, tenant movements, construction or absorption. Thus, the baseline inventory data was “cobbled” together based on input from brokers, field reconnaissance, and County assessment records.

Existing Office Market Conditions

An inventory of competitive office space was developed based on input from real estate brokers, assessment data, field reconnaissance, online listings, and other sources. Based on this information, it is estimated that the county has a competitive supply of about 672,000 square feet, much of which is concentrated in

or near Downtown Springfield. The competitive supply includes the following sample of buildings in Springfield and surrounding areas:

- Credit Life (EF Hutton)
 - 150,000 square feet in a 10-floor building built in 1980 and designed in the International Style by famed architects SOM. The building is estimated to be approximately 75% vacant and was sold most recently for \$5.00 per square foot.
- Bushnell Bldg:
 - 125,000 square feet in an historic building (built 1893), estimated at 50% occupancy.
- NextEdge Applied Technology Campus. An office/tech park designed as an economic development tool to attract tech-related companies associated with military contracting and other spin-off in the region. Only two buildings have been developed in the park to-date, one of which functions as a corporate headquarters.
 - Speedway Headquarters. Speedway is a convenience retail brand of national significance, with its 55,584 square-foot owner-built and occupied headquarters relocated to the park in 2007.
 - ATIC Springfield: 38,000 square-foot building constructed in 2008. This relatively new building is estimated to be 25% vacant.
- McAdams Building.
 - 51,000 square feet built in 1920. This historic structure is 100% occupied.
- KeyBank Building.
 - 24,120 square feet built in 1961. The building is owner-occupied but does have some unutilized space (estimated at 25%).
- Hull Plaza/National City Bank.
 - 72,000 square feet built in 1930, about 80% occupied.
- 2525 North Limestone.
 - This former Speedway building has 20,000 square feet built in 1981. The building is about 85% occupied.
- New Sun Building
 - 35,000 estimated square feet, built in the 1920s, is about 25% occupied.
- Chamber of Commerce / OH Edison
 - 35,000 square feet designed by SOM and built in 1979, is only 15% occupied.
- Security Bank
 - 35,000 square feet, also designed by SOM in 1979. This is an owner-occupied bank building.



- Kissell Building
 - 32,000 square feet built in 1960, only 20% occupied.
- Various medical offices. There are various medical dental, chiropractic and related offices in the area, most of which are owner-occupied.
 - 134,000 estimated square feet of space overall, with about 90% Occupancy (an estimated 15,000 to 20,000 square feet vacant)



Vacancy. Based on the sample inventory identified above, there is a total of about 356,000 square feet of vacant space, more than one-half (52.9%) of the competitive office space in the county. While this number reflects a sample, it is nevertheless significant in conveying the challenges facing the office market in Springfield and Clark County. Several buildings may have physical challenges and may be functionally obsolete, reducing opportunities for office occupancy. But for the most part, much of the vacant office space appears to be habitable or is available for occupancy.

Rents. Springfield-Clark County office rents are estimated to average \$6.00 to \$8.00 on a Modified Gross basis. The highest end of the market (such as medical office space) commands rents closer to \$9.00 or \$10.00 per square foot.

Tenant Mix. Aside from a few corporate offices and medical practitioners, the office tenant mix includes primarily attorneys, professional services, and some back office users (e.g., EF Hutton, the struggling digital online investment operation).

Existing Retail Market Conditions

It is estimated that Clark County has a total supply of about 1.3 million square feet of competitive retail space within its commercial corridors, downtown and nodes. An inventory of retail space was developed based on information from brokers, field reconnaissance, online listings, assessment records and other inputs. Selected retail centers and nodes are listed below.

- Upper Valley Mall
 - 100,000 square-foot enclosed center, with only about 25% of space occupied. Most anchors and larger stores have closed, including Elder Bearman, Macy's, J C Penney, and Chakers. Only Sears remains. The good news is that the Springfield Sears store has not made the last two lists of 180 store closings announced by the retailer.
- Bechtle Avenue Corridor

- 600,000 square feet of relatively healthy retail use. Only about 5 to 10% of commercial space is vacant and available. Key anchors include Wal-Mart, Marshall's, Kohl's, Best Buy, and Lowe's, most of which are discount drivers. There are also a number of chain pad locations (e.g., Olive Garden) and strip commercial.
- Center East
 - 250,000 square feet anchored by Wal-Mart.
- 5 Kroger centers
 - 250,000 square feet total in these centers scattered around the county. An estimated 10% of retail space in these centers is vacant.
- Downtown Springfield
 - 100,000 square feet of estimated space in the downtown area. About 50% is estimated to be vacant, but there are signs of life with several new specialty businesses and venues entering the downtown market.

Vacancy. It is estimated that about 193,500 square feet of retail space is vacant, yielding an overall vacancy rate of 85% in Clark County. While not as dire as the office market situation, retail vacancy of 15% is still relatively high. Given current issues like stagnant demographics and changing consumer buying behavior, it is likely that the “overhang” in retail space is likely to remain in place for a while.

Rents. According to brokers, rents are averaging \$6.00 to \$8.00 per square foot in competitive spaces. The mall offers lower rents, closer to the \$6.00 to \$7.00 range, while the Bechtle Avenue Corridor offers maximum exposure for prime space ranging from \$8.00 to \$16.00 per square foot.

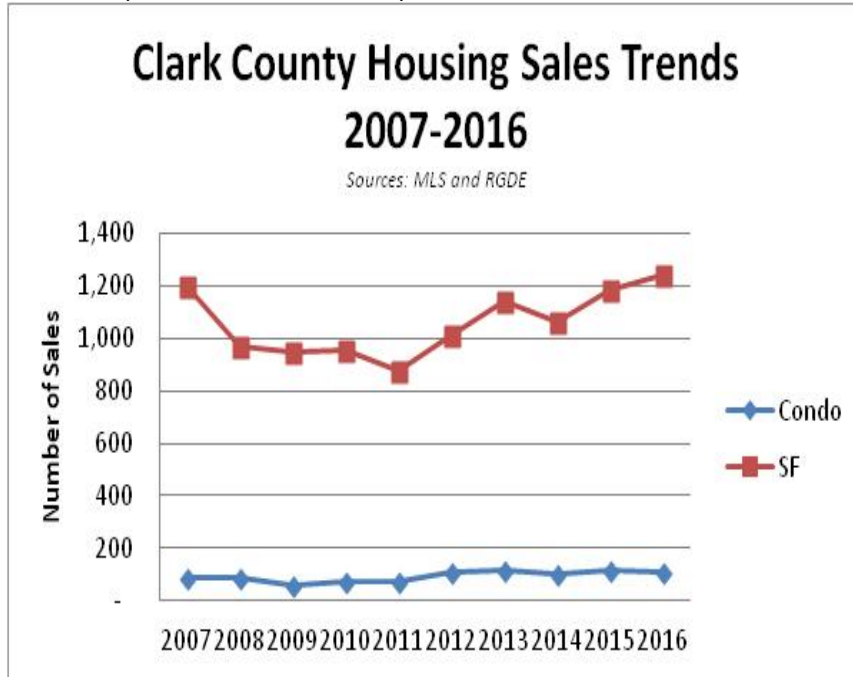
Existing Housing Market Conditions

Reflecting the overall demographic trends of the county and the region, housing supply in Clark County is declining. In 2010, Clark County had a total of more than 61,400 housing units. But according to the U.S. Bureau of the Census, the county had lost about 400 of those units by 2015, with an estimated total of about 61,000. The County recorded only 55 housing permits in 2016. About two-thirds of the county's housing is owner-occupied, slightly more than the national average. Clark County is a relatively affordable place to live, with both for-sale and rental housing costs averaging about 28% less than the respective national averages. Much of the housing stock is aging, and housing conditions in some of the older neighborhoods are deteriorating. There is a need to examine how best to turn-around the housing stock as a tool for reinvestment and business recruitment.

Sales and Prices. Overall single-family housing sales fell from about 1,200 per year in 2007 to a low of just over 800 per year in 2011, after the country had started to recover from recession and financial crisis. Sales had only returned to

their previous levels by 2016. Meanwhile, the county has relatively few condominium sales, averaging around 100 or less per year. Sales have remained relatively static but did not seem to be as impacted by global pressures during the recession.

Chart 4 (and Chart 5, below)



Average for-sale housing prices also dipped during the recession, to a low of about \$86,800, before rising fairly consistently through 2016 to a high of



\$117,400 before dropping back again early in 2017 to \$107,900. Since the data for 2017 do not represent a full-year, the trend may not have fully reversed. Condominium prices fell from a high of about \$106,100 in 2008, down to \$93,300 in 2014 before increasing again to \$113,200 in early 2017. Again, the 2017 numbers do not necessarily reflect what may happen during the rest of the year. Surprisingly, the average condominium price actually exceeded the average single-family price from 2007 through

2013, again in 2017. That is surprising, since condo prices often run 20 to 40% lower than single-family units. The situation in Clark County may reflect the low

quality and over-supply of single-family housing units vis-à-vis condos. Some brokers claim that the county is “overbuilt” with subsidized housing, which drives down the price of market-rate housing. There is some movement on the senior housing market, where eight acres located at High and Burnett are slated for construction of 34 senior housing units (28 1-bedrooms, \$161,000 per unit).

Key Drivers and Assets for Economic Development

Based on review of economic trends, stakeholder input, field reconnaissance, existing documentation, and real estate market conditions; economic “drivers” and assets have been identified for Clark County. Several of the key drivers and assets are discussed below.

Location & Interstate Access

Certainly one of the county’s greatest strengths is its location, well-situated within the “Tri-Metro” Area, comprising Columbus, Dayton, Cincinnati. Commutation patterns clearly show that the county is well-positioned for businesses that wish to draw from a broad regional labor market as well as a large market base. While Springfield and Clark County by themselves present a relatively small metro market, their strength is magnified when considered as part of this broader region. Even with Dayton’s relatively stagnant economy, growth in Cincinnati and, especially, Columbus, helps to paint a more positive picture of the regional economy.

Clark County also offers a superb location for accessing specific employment nodes and contractors relating to Wright-Patterson Air Force Base, Honda, and other major job centers in the region.

Institutions

Clark County is home to Wittenberg University, a small but growing college with a good reputation. Enrollment has exceeded 2,000 students, up 16% since 2010. So, the college’s growth trajectory, with larger numbers of educated young graduates, can help strengthen overall county-wide economic prospects. Also situated in the county is Clark State Community College, an important resource for local businesses and prospective employers. The Global Impact STEM Academy and other schools can become important links in raising the bar for education in Clark County.

Heritage

Springfield and Clark County offer an interesting and vibrant historical context, exposed through architectural heritage, markets, and attachment to a well-known historical figure in George Rogers Clark. Cultural, architectural, and historical elements can be used to help invigorate local pride and establish a sense of place, and also to strengthen local identity.



The county has a number of “iconic” design features that help to establish a sense of place and a unique identity. Mid-Century Modern roadside architecture, Ohio farm county houses and barns, Victorian houses, and Springfield’s many architectural gems (The Market Building, SOM-designed modern buildings, Victorian storefronts, etc). Buildings that may seem pedestrian to local residents who are used to the design (like Security Bank’s streamlined modern architecture) actually have significant design value, especially as part of a broader package, for branding and marketing the county.

Existing Business Base

The county already has a strong and vibrant base of businesses, including several regionally or nationally-recognized brands. Among the larger local companies are Assurant Specialty Property, Speedway, Community Mercy Health Partners, Navistar, Dole Fresh Vegetables, International Truck & Engine, Bell Nursery, Bob Evans, Eby Brown, TAC Industries, Gordon Food Services, Reiter Dairy, Security National Bank, Yamada NA, Young’s Jersey Dairy, Buckeye Diamond Logistics, AdCare, and others. These businesses provide the backbone for strengthening the community’s education, business recruitment, and

investment efforts. When Clark County is strong, then it only serves to help local businesses.

Stakeholder Input

A presentation and economic visioning session was held with business leaders as part of a Greater Springfield Chamber of Commerce meeting held to help inform the planning effort. Key findings and input from that meeting and from other interaction with stakeholders is summarized below.

Manufacturing

The manufacturing sector is growing but also automating, increasing productivity and reducing the need for additional labor. The region's manufacturing base is increasingly oriented to lower-wage jobs in part because of constraints in the labor market. The labor force lacks "job readiness," which is a serious deficiency marked by a lack of experience and unwillingness to meet basic work requirements. There is also a lack of commercialization and new product development, characteristic of the region's aversion to risk and of the lack of an investment "eco-system."

Stakeholders envision a future manufacturing sector that is "sustainable" (close to capacity). The labor force would be "ready" for work and would meet the skill requirements for newer, technologically-driven production. Businesses would then be able to offer competitive wages in the labor market. New opportunities would emerge through contracting from Wright-Patterson AFB.

Housing and Amenities

Stakeholders note that the supply of competitive housing is lacking in this market, particularly for executive housing (\$200,000+) and rental apartments available for young or relocating workers. Much of the current rental market is driven by a large number of individual (often absentee) landlords who fail to maintain the condition of properties. While properties are relatively affordable, landlords are not paying their fair share of taxes, according to the stakeholders. Housing within the county's major corridors is in poor condition, impacting on the visual image projected for economic development. There is also a lack of amenities, other than (for example) wonderful parks, arts, and recreation activities.

Stakeholders envision of future where there are incentives offered to leverage higher-quality housing and market-rate "urban living." Better rental housing management would be achieved through "economies of scale," and there would be revitalization or redevelopment of older housing stock.

Summary of Overall Strengths and Challenges

Some of the information gathered through analysis and by engaging with businesses and other stakeholders has been consolidated for the purposes of summarizing Clark County's overall strengths and challenges for economic development purposes. The following summarizes these findings.

Strengths

- **Location**, Center of "Tri-Metro Region." As noted earlier, the county's location is certainly one of its greatest strengths for economic and labor force development. Stakeholders agree that location is one of Clark County's greatest assets. The South Corridor was perceived as having opportunities for further development.
- **Interstate Access**. Unlike many places, Clark County does offer interstate highway accessibility, which automatically places the county in a position to attract business and exogenous trade.
- **Growing Regional Labor Force** (Access to Columbus). While Springfield and Clark County have continued to experience demographic decline, they are part of a growing regional labor market driven by the expansion of the labor force especially in Columbus.
- **Large, Diverse Business Base**. The county already has a large and diverse business base including several well-known regional and national brands.
- **Downtown Springfield & Architectural Heritage**. Downtown Springfield has a wealth of architectural heritage and diversity, and generally offers "good bones" for rehabilitation, revitalization, and reinvestment. The downtown area offers a grid street pattern and unique building stock for attracting businesses seeking to locate where there is a sense of place. Clark County also offers an historical context and unique places and sites of cultural interest, like the Hartman Rock Garden.
- **Growing Institutions**. Wittenberg and other area institutions are growing, providing Clark County with an opportunity to focus attention on positive change and growth in the young, educated workforce.
- **Labor Force Development**. There are institutions working pro-actively to enhance the size and quality of skills in the labor force.
- **Access to Regional Economic Drivers**. Clark County offers access and proximity to Wright-Patterson, Honda and other major employers, generating opportunities for contracting and spin-off.

- **Manufacturing Structure to Support Growth.** Despite the decline of manufacturing locally and nationally, Clark County does offer the structural components to support stability if not revival in the manufacturing sector.
- **Growth Potential to the East.** Because of the demographic and physical expansion of the Columbus Metro, there will be increasing opportunities to capture growth to the east.
- **Parks and Recreation Assets.** Springfield and Clark County have wonderful public amenities including parks and recreation assets that help to enhance the quality of life for residents. Some also see an opportunity for “lifestyle communities” that build on the area’s recreation strengths.
- **“Fighting Attitude.”** Stakeholders have noted Springfield’s and Clark County’s characteristically strong moral fiber and spirit of collaboration to work together towards the community’s future.

Challenges

By the same token, the county does suffer from a number of challenges that exemplify economic stagnation over time. Several of these challenges are summarized below.

- **Demographic Decline.** Declining population and income base do not bode well for locally-generated demand or long-term growth. Ultimately, the county suffers from a variety of demographic trends that can affect its economic stability, including:
 - Exodus of young, college-educated professionals, thereby reducing the available workforce for prospective businesses.
 - Aging population, resulting in stress on local social services and tax base.
 - Lack of diversity, which can affect the county’s ability to attract businesses eager to showcase their diverse hiring and good workplace conditions while competing in a tight national labor market.
 - Falling household and income base, which impacts on demand for retail goods and services, and therefore erodes revenue potential.
 - Dayton-Cincinnati stagnation, which continues despite some signs of stability.
- **Lack of Appropriate Skills and Job Readiness.** Clark County is not alone among Midwestern manufacturing-based economies in experiencing the

negative impacts of automation and new technologies on an aging workforce.

- **Lack of Appropriately-Skilled Workers.** Shifts in skills requirements are leaving some behind, especially older workers and those whose skills were honed for many years based on obsolete technologies.
- **Challenges in Worker Retention.** Without job growth, high-quality housing and amenity base, businesses find it hard to retain good workers.
- **Addition Problems and Lack of Job Readiness.** An issue that has cropped up frequently in discussions with Clark County businesses is the lack of job readiness, where prospective workers are not attuned to the requirements for work or suffer from a growing array of addition problems. There is also a lack of public transportation options and mobility for workers that do not or cannot drive. Some stakeholders noted the impact of entitlement programs on the motivation to work.
- **Poor Housing Stock Quality and Availability.** A number of issues have been raised through field reconnaissance, assessment of existing market conditions, and stakeholder engagement about the quality of the housing stock and the availability of high-quality housing. Clearly, the distressed economy and declining residential demand have compounded challenges relating to the aging of the housing stock. The lack of resources to assist homeowners and landlords has only exacerbated the problem. Without a high quality housing stock, it becomes more challenging to recruit businesses and educated workers, which further contributes to the cycle of decline.
- **Lack of Amenities and Entertainment.** While the county offers wonderful recreation amenities, rural landscapes, architectural heritage, and arts & cultural institutions, it does lack certain retail amenities and entertainment that can help attract or retain educated professionals and other workers.
- **Lack of Employment in Professional, Scientific, Technical Services.** This economic sector is wholly under-represented in the local economy, impacting on overall incomes and purchasing power.
- **Lack of Venture Capital.** Stakeholders noted that Clark County is perceived as being “wealth-deficient,” since few large businesses are owned locally and there are few unrestricted assets. Overall, there is a perception that Clark County and the region are “risk-averse,” which constrains the commercialization of new ideas and the development of new products.

- **Lack of Forward Brand and Identity.** There is the question of “Which Springfield?” (There are 40 cities named Springfield in the USA alone). The city has developed a number of brands over many years, including Champion City, Home City, Rose City, and others. But what is Springfield today, and what is it to become?

The Convention and Tourism Bureau has focused attention on Springfield/Clark County as a place to “Find Your Unwind,” through nature, parks and recreation, summer arts festival, heritage tourism, antiques shopping, and other relaxing activities. But whether these visitor experiences align with the broader identity, character, and development vision of the county, needs to be tested.

Section 2. TARGET INDUSTRY REVIEW & ANALYSIS

A Target Industry Analysis was conducted for Springfield in 2012. Known as “Building on Springfield’s Assets: Leveraging a Better Future,” the study examined the city of Springfield’s target market and business recruitment opportunities based on an analysis of industry concentrations and growth prospects. Rather than re-inventing the wheel, work conducted for Connect Clark County sought to update and refine the previous study, expand its scope to include the rest of Clark County, gather additional stakeholder input, and fill any gaps in implementation that might help move economic development efforts forward. As noted previously, an “Economic Visioning Session” was held with business stakeholders to help gather further input.



This effort revisited the question of Springfield’s and Clark County’s competitive advantages. Additional analysis was also conducted to assess concentrations, clusters and growth prospects, as a basis for refining or amending the 2012 targets.

Competitive Advantages

The “strengths” identified in Section 1 of this report summarized key findings from the baseline economic assessment. This information was subjected to more detailed review in order to identify the competitive advantages relevant to economic development in the county. These competitive advantages are then related to specific industry cohorts in order to illustrate how the county’s strengths can translate into opportunity.

Accessibility

As noted previously, Clark County has an excellent location for reaching a broad, regional market and labor force at the heart of the “Tri-Metro Region.” This accessibility supports business development in transportation, logistics, manufacturing, regional services, and administrative services (such as back-office administration) .

Regional Market for Goods and Services. This access enhances opportunities for businesses to capture demand for goods and services within a large catchment and market area with a population of 2.3 million people. This type of location supports businesses associated with administrative services and back

office uses, tourism and day-trips, suppliers, contractors and web-based businesses.

Regional Labor Force. The location also allows Clark County businesses to potentially access the large and growing regional labor force including workers from Columbus to Cincinnati.

Access to Wright-Patterson. The location provides access to the military installation for technology development and contracting opportunities.

I-70 Super-Regional & National Market Access. The location on I-70 allows the county access to markets above and beyond the Tri-Metro Region. Very high volumes of truck traffic travel this route connecting major metropolitan areas, east and west.

Affordability

Clark County also offers relative affordability in terms of the cost of living, the cost of doing business, and the cost of transportation. Affordability is key in particular to companies that wish to hire young people, recent college graduates and others with limited resources. Administrative support, accommodation and foodservice, health care services, and other industries are particularly dependent on younger workers.

Available Sites and Historic Buildings

Clark County has plenty of available land in business and industrial parks, as well as space in office buildings that can accommodate a variety of businesses. There is “room to grow” and opportunities for investment and purchase of architecturally-significant buildings not often found in such great numbers.

Diverse Business Locations

Clark County offers rural, small town, suburban and urban locations for business. Downtown Springfield provides an urban setting, with streets laid in a grid and higher-density buildings clustered around the commercial heart of the city. Springfield’s commercial corridors provide a more suburban environment, while smaller communities in the county like New Carlisle, South Charleston and Catawba offer a small town feel.

Existing Business Targets, Strategies, and Progress

An effort to identify target industries for marketing and for the economic development of Springfield produced “*Building on Springfield’s Assets” Leveraging a Better Future*” in 2012. As noted above, the target industry analysis identified several business sectors for target marketing and business recruitment. These sectors and associated industries included the following:

- **Agribusiness, food processing & technology**
- **Manufacturing:**
 - Aerospace parts
 - Auto parts
 - Composites
 - Manufacturing services
 - Machinery
- **Logistics & distribution**
- **Professional services**
- **Insurance**

To a large extent, the recommended industries build on Springfield’s existing strengths and business base, primarily in production sectors (agriculture, manufacturing) and industries associated with the transport and distribution of these goods. For example, the County’s location in an agricultural region supports development of agribusiness. Location also played a role in recommendations for Clark County to lead in logistics and distribution. With a long history as a manufacturing center and support infrastructure, there was an attempt to re-structure this sector. Particular attention was paid to contracting and other opportunities that might spin-off from Wright-Patterson Air Force Base (aerospace parts) and from the region’s automobile manufacturing OEMs (auto parts) along with industries that serve both industries (composites, manufacturing services, and machinery).

Only two service industries were recommended, one (insurance) building on an existing business base and the other filling a gap in the need for professional services at the local level.

Strategies (2012)

Several broad strategies were also developed for Springfield’s leadership to focus efforts to support these targets. First, it was recommended that leadership “promote and strengthen industry clusters,” with a particular attention on retaining and recruiting business, growing exports, and marketing. There was also a set of recommendations relating to the need for build a culture of innovation and improvement. This effort would require leadership to support entrepreneurs and track their progress. Finally, the third set of recommendations focused on comprehensive workforce development, including attention to skills associated

with the target industries. The strategy recommended use of social media and the marketing of Springfield's quality of life.

Accomplishments

There have been some significant accomplishments since the completion of the 2012 strategy. Perhaps the greatest progress has been achieved in workforce development and job readiness. A number of new programs have been established to focus on enhancing local skills and matching the skills base with job opportunities. Among the initiatives underway include All About Me, associated with a career fair and various employment communication efforts; the Clark County Internship Collaborative, meant to provide experience as part of a ladder into the workforce; Straight A Consortium (Dome), an effort to establish an innovative learning hub; the Clark County Manufacturing Collaborative, to bring producers together for joint efforts; and new certification programs through TAACCT.

Local economic development proponents point to signs of recovery in Clark County, with new employment opportunities created or retained, and new investments by important anchor businesses (Navistar, Dole, Speedway, Yamada, EF Hutton, Topre, ED Holder, Pentaflex, Heroux Devtek, etc).

The Chamber of Commerce has also initiated new branding efforts focused on growth, through "Expand Greater Springfield." Marketing and promotion has included participation in trade shows, outreach efforts, development of new marketing materials, enhanced website, and other efforts rewarded through recognition. The "I-70 Logistics Corridor" has been designated as a marketing tool, with Springfield and Clark County as an important hub. Business retention efforts have focused on communication, networking, and assistance to local businesses.



Business sites have been marketed, including Prime Ohio II Corporate Park (182 acres adjacent to I-70) and Champion City Business Park (now fully-developed).

Target Refinements

Further analysis was conducted, along with stakeholder engagement, to help update and refine these 2012 targets, and ensure that they respond to the broader needs of the county at-large.

Industry Concentrations

Among the analyses conducted focused on Location Quotients (LQs) based on the most recent employment and establishment data, used to identify high industry concentrations as an indicator of local competitive advantages. This analysis did not include retail or other locally-driven services that are more dependent on local demographic patterns than any particular regionally-competitive location advantage.

The following Clark County industries exhibited LQs of 5.0 or higher for employment and establishments, indicating an extremely high concentration as compared with the state or nation as a whole. Many of these concentrations were positioned in the manufacturing sector.

Manufacturing

- Dairy Production (311511) : 6.75x establishments, 8.95x employment
- Seasonings & Dressings (311941) : 9.00x / 1.149x
- Textile & Fabric Finishing (31331): 6.75x / 5.95x
- Fertilizers (Nitrogenous) (325311): **13.49x / 21.69x**
- Spring Manufacturing (332613): 7.44x / 8.48x
- Measuring & Dispensing Pumps (333913): **26.99x / 45.48x**
- Heavy Duty Truck Manufacturing (33612): **36.98x / 27.52x**
- Musical Instrument Manufacturing (339992): **9.39x / 13.65x**
- Other Metal Containers (332439): 4.32x / 7.44x
- Metal Heat Treating (332811): 4.36x / 7.25x
- Lawn & Garden Tractors (333112): 13.49x / 3.92x
- Industrial Truck & Trailer Mfg (333924): 10.79x / 4.51x

Clark County has particularly high concentrations of employment in the production of fertilizers, measuring & dispensing pumps, heavy duty trucks, and musical instruments. Many of the highly-concentrated industries are related to agricultural supply, food production, or transportation equipment manufacturing.

Other Sectors

- Refrigerated Warehousing (49312): 6.75x / 7.18x
- Other Publishers (51119): 6.35x / 67.86x
- Radio Networks (515111): 9.81x / 47.93x
- Drive-In Motion Pictures (512132): 4.69x / 28.80x
- Psychiatric & Substance Abuse facilities (622210): 6.00x / 3.63x
- Other: Forging & Stamping, Plate Work, Motor Vehicle Bodies & Parts, Other Aircraft Parts, Upholstered Furniture, Jewelry & Silverware, Frozen Food Wholesale, Poultry Product Wholesale, Fresh Fruit & Vegetable Wholesale, Tobacco Product Wholesale, Other Ground Transport, Other Support Activities for Transport, Libraries/Archives, Computer & Apprenticeship, Community Food Services, Room/Board, Home/Garden.

The LQ analysis also identified other industries where Clark County has an unusually high concentration of employment and or establishments. Again, many of these non-manufacturing industries are associated with food & agriculture (e.g., frozen food wholesale, poultry product wholesale, fresh fruit and vegetable wholesale, community food services, refrigerated warehousing, tobacco product wholesale) or transportation (e.g., motor vehicle bodies & parts, forging & stamping, aircraft parts, other ground transport & support activities for transport). Clark County also has several concentrations in media (publishers, radio networks, drive-ins).

Growth Sectors

While the findings of the Location Quotient analysis are fairly consistent with the recommended targets found in the 2012 report, an assessment of which industries are actually growing and where jobs are being created does identify other areas of opportunity for Clark County. Consistent growth sectors like wholesale trade and transportation services support the targeting of logistics services.

But finance, management, and administrative services are also consistently growing sectors in Clark County. Management services has been highly-dependent on the growth of one company (Speedway). But back-office type operations for banks, insurance companies, mortgage lenders, and various other firms that require support services present a very real opportunity based on the county's competitive regional location advantages, affordability, and continued employment growth.

Finally, certain services like accommodation and foodservice suffered through the recession but have returned to growth mode in the county. These types of services can generate revenues (and fiscal benefits) from outside of the county, and are thus less-dependent on local demographics.

Refined or Additional Targets

As noted above, there are several target opportunities (like logistics) that were confirmed to an extent through this additional analysis and through discussions with stakeholders. These updated inputs also resulted in the addition of several new targets and refinements among others, as follows.

- **Administrative Services.** Clark County has competitive advantages for attracting firms or divisions of companies engaged in business support and related “back-office” functions. Past and future projected growth in this sector regionally and nationally also supports the opportunity for creating new jobs in the county.

Key elements of this opportunity include business services and back office functions including customer service, tech support, and business process outsourcing (BPO). Further, the skills set for these jobs is relatively diverse, but includes a number of skills that do not require a college education (e.g., personal communications, data entry), as well as advanced skills in auditing, accounting, management, and information technologies. Local college students and graduates provide a ready available workforce for certain mid/high-skill positions.

Clark County can also draw from the regional labor market to fill gaps and to match skills requirements of specific companies. So, in marketing and recruiting business, it would be critical to examine how and where specific skills requirements would be met locally as well as regionally. The urban locations such as Downtown Springfield, if augmented by entertainment, housing and dining options, provide an affordable opportunity for attracting the young workers needed to fill these types of positions.

- **Arts, Entertainment & Recreation.** The county offers certain existing assets and strengths, especially in terms of its parks and recreation opportunities. Pro-active development or recruitment of arts, culture and entertainment activities is valuable to broader economic development marketing, since these activities build amenity value and brand identity necessary for retaining or recruiting young, educated workers that help to support growth of business. These activities also help enhance opportunities for building tourism (through growth in accommodation and foodservices) and attract income and tax revenue from outside of the county. Finally, these assets help enhance community character and pride of place, reinforcing opportunities to build the labor force.
- **Other Refinements.** Based on the updated analysis and stakeholder input, it is recommended that several refinements be made to marketing efforts oriented to the existing target industries. These refinements include the following:
 - **Food Production.** While “Agribusiness” is an existing target, along with Manufacturing, the nexus of these to mega-sectors is food and related production. There are opportunities to focus more specifically on recruiting and developing businesses engaged in production of food, beverage, and related products. The county’s strategic location within the “Tri-Metro Region” and within the I-70 Logistics Corridor suggests opportunities for growth in distribution of food products. Situated within an important agricultural region helps support this effort.
 - **Metals.** The county already has a significant cluster in metals production and is well-located in the nation’s largest metals-

production region. Access to primary fabrication along with a ready market for transportation equipment suppliers within this I-70 Logistics Corridor, the county is well-positioned to pursue expansion of this cluster.

Transportation Analysis

Current Transportation Summary

General

The Clark County transportation system consist of a variety of travel modes including automobile, bicycle, pedestrian, public transit, air, and rail. These modes have a wide range of uses from recreational to business. They also serve both private and public entities. Interstate Route 70 (I-70) traverses the County and provides multiple interchanges for access to the City of Springfield and surrounding areas. Via I-70 and other freeways, Clark County is within an 8-hour drive (600 miles) of approximately 41% of the US population as can be seen in **Figure 1**.

Roadways

Overall, Clark County has excellent roadway connectivity. State and federal roadways within the region consist of:

- North-South: US 68, SR 72, SR 235 and SR 54.
- East-West: I-70, SR 41, SR 4, US 42, and US 40 (National Rd).

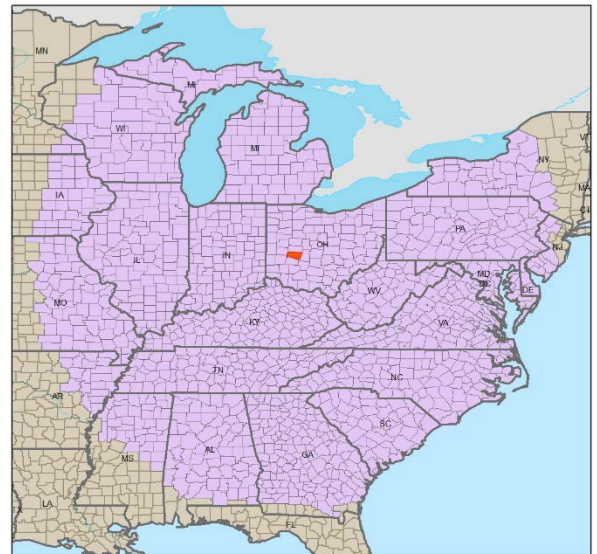
With the exception of recurring congestion on the four-lane section of I-70, and some other spot locations, there is excellent traffic flow for local travelers. Because the current roadway system, particularly in the City of Springfield, was built at a time when population and employment levels were much higher, many roadways have excess capacity.

Other non-state or federal roadways of significance are:

- Upper Valley Pike
- Dayton-Springfield Rd
- Selma Pike
- Spangler/Medway-Carlisle Rd/Milton-Carlisle Rd

There are currently plans (in 2019) to widen I-70 to three lanes in each direction through Springfield match the freeway sections to the east and west, which should mitigate congestion and further improve access to central and western Ohio.

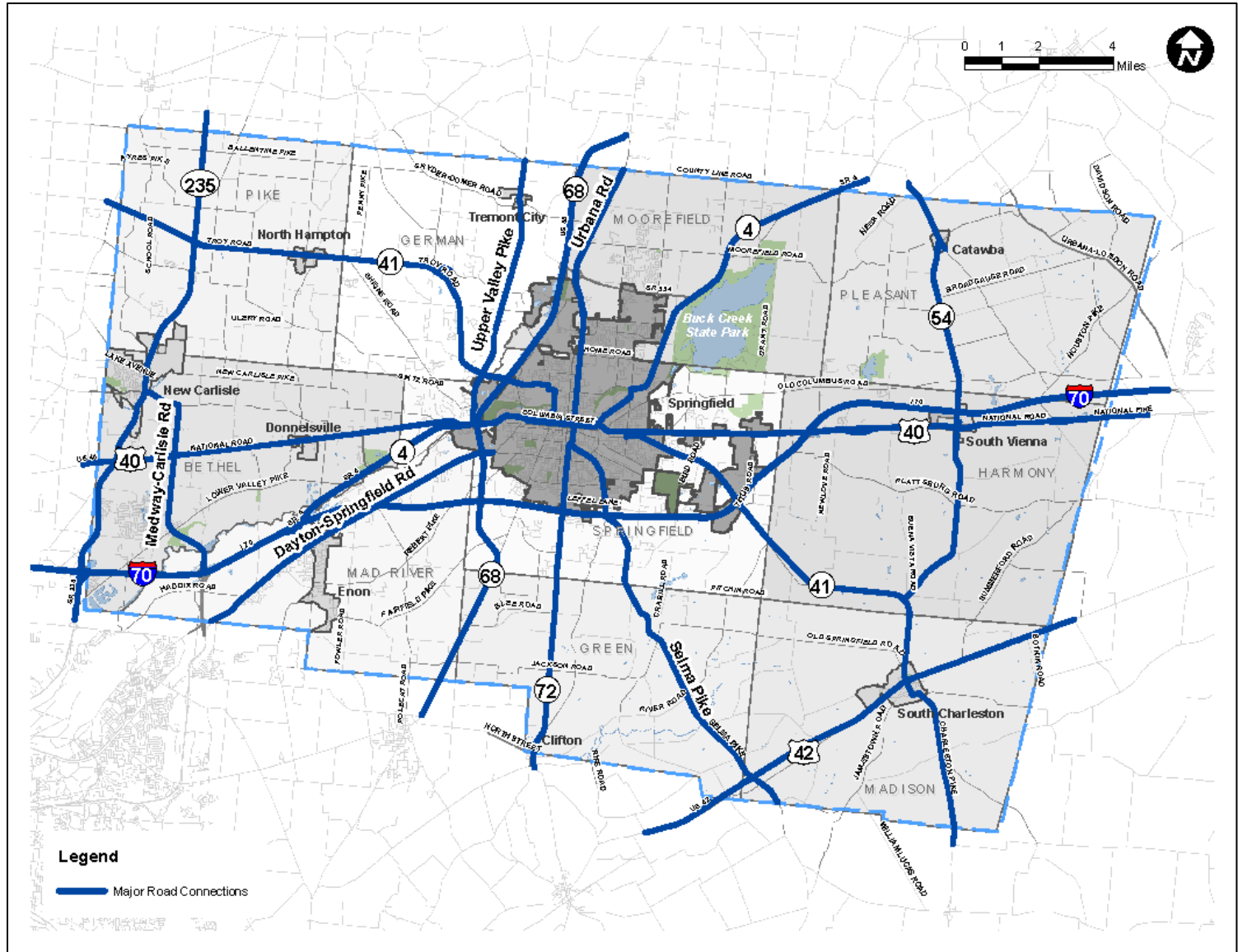
Figure 1: Clark County Impact Area



Transportation Analysis

Current Transportation Summary

Figure 2: Key Local Roadways Map



Transportation Analysis

Current Transportation Summary

Trails

There is an excellent trail system in the region. There are currently five main trails within Clark County as shown on **Figure 3**. These trails are maintained by the National Trail Parks and Recreation District (NTPRD) and the Clark County Parks District (CCPD). Overall there are approximately 35.8 miles of paved and maintained trails in Clark County.

In 2015 a trail assessment of the existing trails within Clark County was done to analyze the pavement conditions and identify maintenance needs, timeline, and cost. The assessment focused on The Little Miami, Simon Kenton, Buck Creek, and Prairie Grass Trails. The Tecumseh Trail was not analyzed because it was recently constructed at the time. For further details please refer to the “Clark County Multi-Use Trail Needs Assessment” report.

The following describes the five primary trails in Clark County:

- The **Little Miami Scenic Trail** (8 miles) currently has a section within Clark County which connects the City of Springfield to the southern county line, and is part of the rails to trails system that follows the path of the Little Miami Railroad (abandoned in 1970’s), connecting to the Cincinnati area. NTPRD maintains the section from Yellow Springs Street north to downtown Springfield. CCPD maintains the section from Yellow Springs Street south to Jackson Road.
- The **Buck Creek Scenic Trail** (7.2 miles) connects Veteran’s Park in downtown Springfield to Buck Creek State Park and to the surrounding trails/roads around the reservoir. The trail is maintained by NTPRD.
- The **Simon Kenton Trail** (9 miles) connects to the Little Miami Scenic Trail in southern Springfield and runs north to Bellefontaine. It mostly follows along an abandoned railroad corridor. It also includes spurs which go to the Splash Zone water park and the Eagle City Soccer Complex.
- The **Prairie Grass Trail** (9.3 miles) is a small portion of the Ohio-to-Erie regional trail system. The section within Clark County, runs through South Charleston and goes from the Greene County line to the Madison County line. This trail is maintained by CCPD.
- The **Tecumseh Trail** (2.3 miles) provides a north-south connection across New Carlisle between two parks within the city. The trail is maintained by CCPD.

Sidewalks

The City of Springfield has a connected system of sidewalks for most of its residential neighborhood areas making walking very possible from neighborhood to neighborhood as well as providing connections to commercialized areas for goods and services. However, the Bechtel Avenue commercial corridor lacks any sidewalks and is not a pedestrian-friendly area. A few neighborhoods north of Buck Creek including Wrenwood Farms, Villa Run, and Edgewood Farms lack sidewalks.

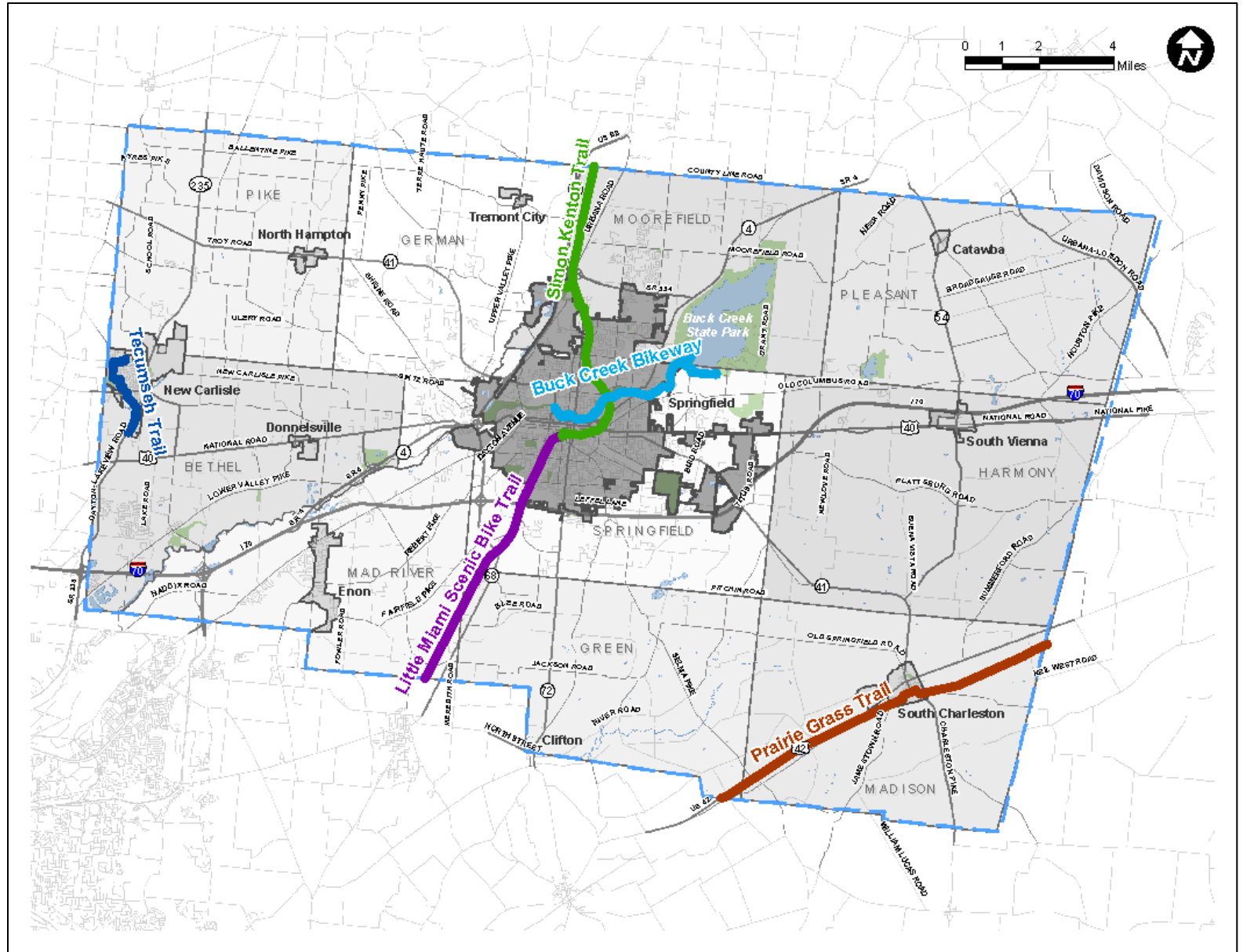
The City of New Carlisle has a sidewalk network throughout its residential neighborhoods. The Village of South Charleston has sidewalks on many of its major residential streets.

Much of Clark County is rural and doesn’t have any sidewalk facilities except for some subdivisions that have sidewalks internal to the development.

Transportation Analysis

Current Transportation Summary

Figure 3: Multi-Use Trails Map



Transportation Analysis

Current Transportation Summary

Transit

Springfield City Area Transit (SCAT) is the major transit provider for the City of Springfield. It is a fixed route transit system that also has ADA Paratransit and Dial-A-Ride transportation options. The Fixed Route option has multiple routes that cover the city. The routes themselves have been recently updated to include seven routes shown in **Figure 4**. Service times and frequencies are listed in **Table 2**.

Table 2: SCATS Service Times and Frequency

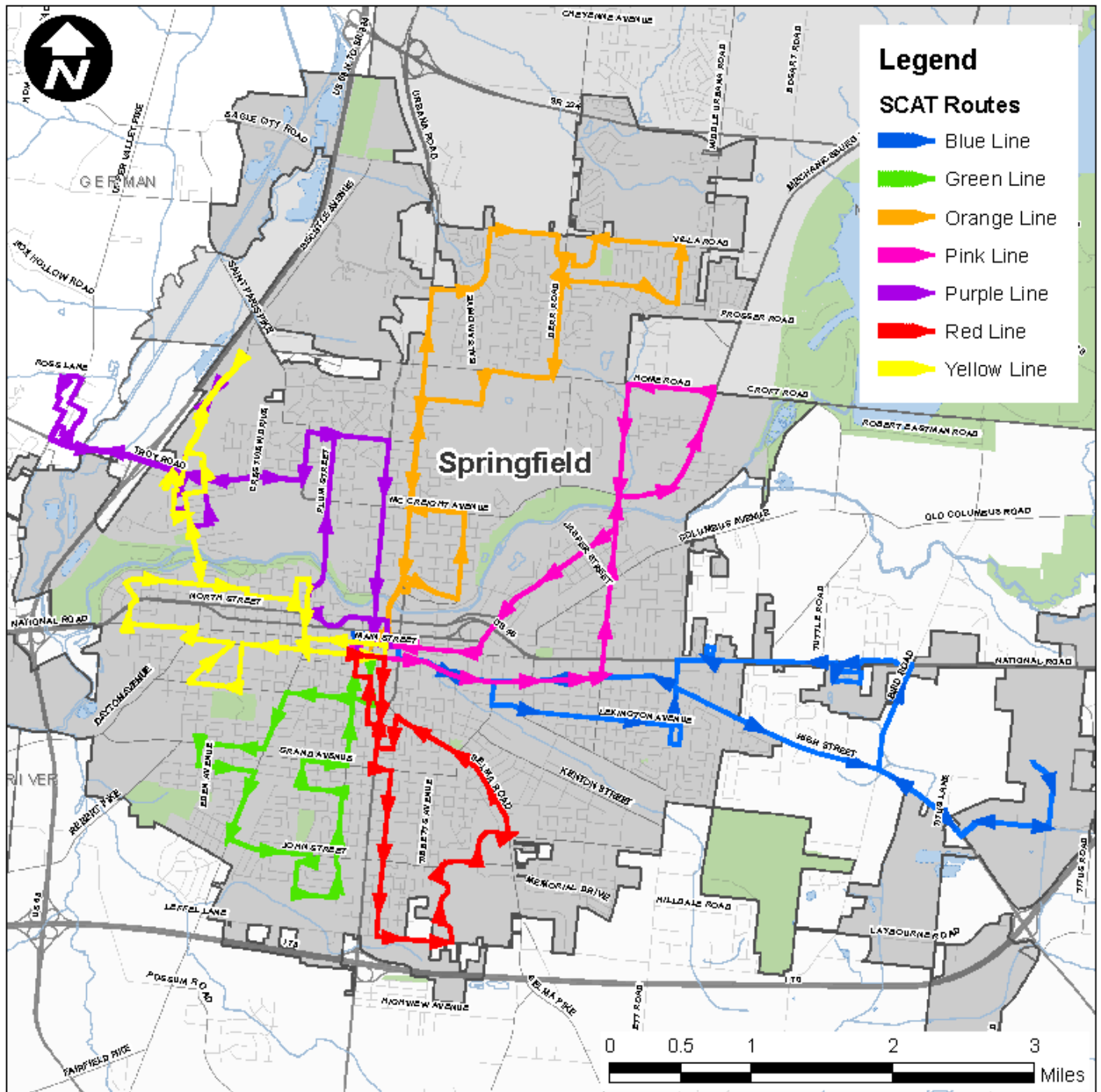
SCAT LINE	First Run Begins	Last Run Begins	Frequency
Green	7:40 AM	5:40 PM	1/2 Hour Service
Pink	7:10 AM	6:10 PM	1/2 Hour Service
Yellow	7:10 AM	5:10 PM	1 Hour Service
Blue	6:40 AM	5:40 PM	1 Hour Service
Purple	7:40 AM	5:40 PM	1 Hour Service
Red	7:10 AM	5:40 PM	1/2 Hour Service
Orange	6:40 AM	5:40 PM	1 Hour Service

While SCAT provides a valuable service to the community, the coverage, service times, and frequencies are relatively limited and deficient in terms of serving people who are transit dependent.

Transportation Analysis

Current Transportation Summary

Figure 4: Transit Routes Map



Transportation Analysis

Current Transportation Summary

Airport

The Springfield-Beckley Municipal Airport is a regional airport located four miles south of the City of Springfield. See **Figure 5**. It is home to a military unit, the 178th Fighter Wing of the Ohio Air National Guard, which helps to provide essential services, air traffic control and emergency services at the airport as part of its lease with the City of Springfield. The airport serves as an important component to Clark County's economy by providing air travel and cargo services for the region, as well as air travel needs to the citizens in the region through charter and private plane services. According to the FAA National Based Aircraft Inventory (NBAI), the Springfield-Beckley Municipal Airport is home to 41 Aircraft. The breakdown from 2016 is as follows, 35 single engine piston aircraft (SEP), 5 multi-engine piston (MEP) aircraft, and 1 jet.

The number of operations (flights) per day is about 65 general aviation flights, which is about 20 less flights than the low end of the 87 flights that was projected by the 2005 airport master plan **Table 3**. General aviation is the term used for all civil aviation operations, and can range from gliders to corporate business flights. 49 of the flights are classified as transient, while the remaining 16 are classified as local. There are 0 commercial, air taxi, or military flights out of the airport.

The military base at the airport which is home to the 178th Fighter Wing of the Ohio Air National Guard has 926 personnel assigned to it, and 1262 personnel if you include the geographically separated units (GSUs). Originally the fighter wing supported a fleet of more than 20 F-16s. In 2012 the Ohio Air National Guard changed its presence by removing those F-16s, and replacing them with remotely piloted aircraft. The Ohio Air National Guard currently flies the MQ-1B Predators. As a result the functionality of the airport has changed, and the air traffic control tower has also closed.

The activity immediately around airport is known as Airpark Ohio. It is a blend of airport, joint military base, and industrial park. Development of the within the area can be viewed as expansion ready, with the full complement utility infrastructures in place, and ready to be tied into. The area has begun to be re-purposed from a transportation-centric use to being a catalyst for business development. Those currently using the area are as follows: Bob Evans Farms, Inc., MEVA Formwork Systems, Inc., United Fiberglass of America, Spectra Jet, and Lineage Logistics.

Transportation Analysis

Current Transportation Summary

Table 3: Springfield-Beckley Municipal Airport Forecast

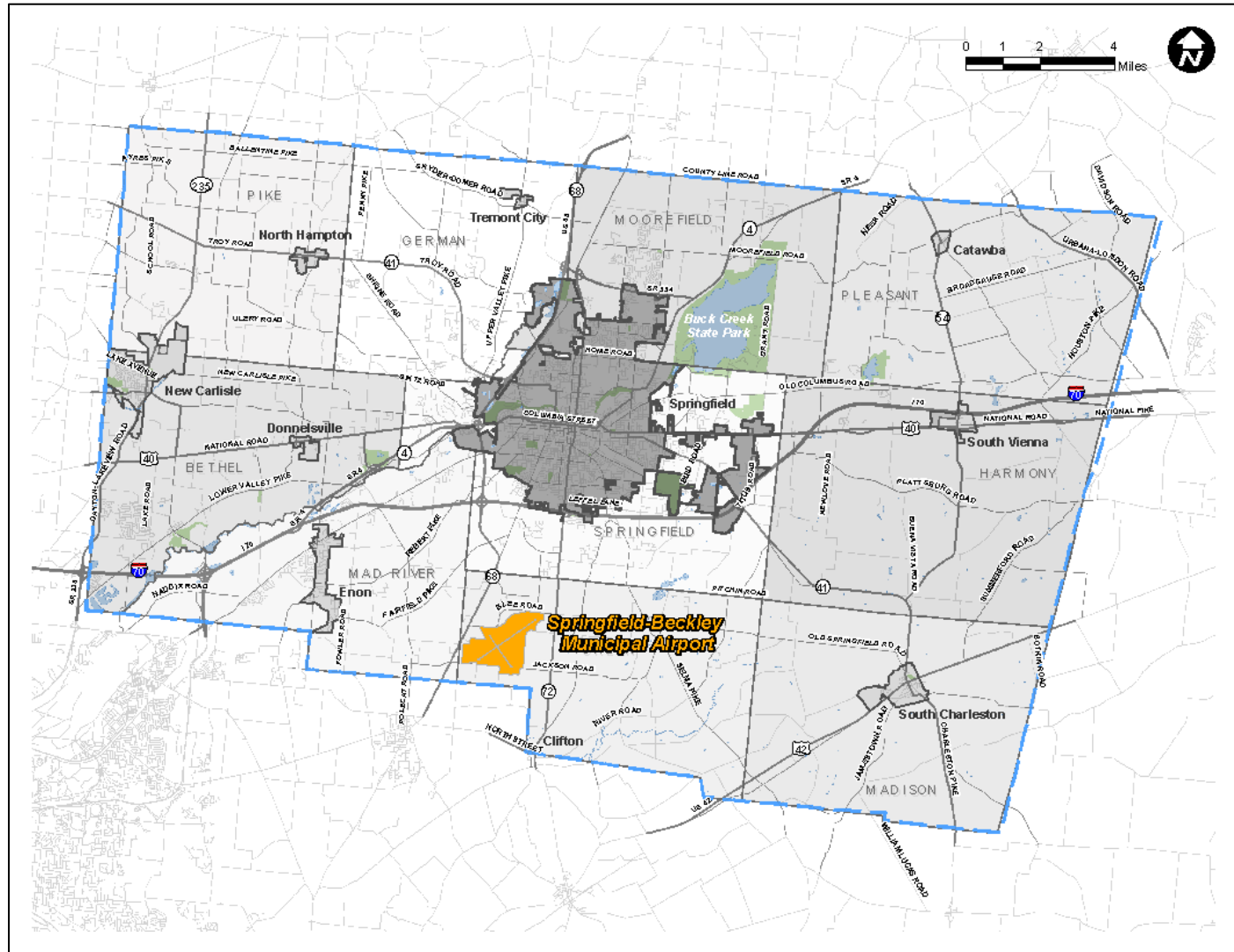
FORECAST SUMMARY												
	2007			2012			2017			2022		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
Based General Aviation Aircraft												
Single-engine	50	59	78	52	61	81	54	63	83	54	64	85
Multi-engine	5	6	8	5	6	8	5	6	8	6	7	8
Turbo Prop	6	7	9	6	7	9	6	7	9	6	7	10
Jet	2	2	3	2	2	3	2	2	3	2	2	3
Military	20	20	20	20	20	20	20	20	20	20	20	20
Total	83	94	118	85	96	121	87	98	124	88	100	126
Annual Aircraft Operations												
Air Taxi (Itinerant)	2,450	2,615	2,780	2,500	2,680	2,865	2,550	2,750	2,955	2,600	2,815	3,045
General Aviation (Itinerant)	19,110	20,397	21,684	19,500	20,904	22,347	19,890	21,450	23,049	20,280	21,957	23,751
Military (Itinerant)	13,000	14,000	15,000	13,000	14,000	15,000	13,000	14,000	15,000	13,000	14,000	15,000
General Aviation (Local)	27,440	29,288	31,136	28,000	30,016	32,088	28,560	30,800	33,096	29,120	31,528	34,104
Total Airport Operations	62,000	66,300	70,600	63,000	67,600	72,300	64,000	69,000	74,100	65,000	70,300	75,900

Source: Aerofinity, Inc., 2002.

Transportation Analysis

Current Transportation Summary

Figure 5: Airport Location Map



Transportation Analysis

Current Transportation Summary

Rail

The three primary railways within the county are West Central Ohio Port Authority (WestCo), Indiana & Ohio Railway (IORY), and Norfolk-Southern Railway (NS). The currently active railroad lines are shown in **Figure 6**.

WestCo owns 94 miles of railroad track in Champaign, Clark, Fayette, Logan, and Madison counties. It is responsible for the preserving of railroad assets and continued operation of rail freight services. Much of the freight services on the WestCo lines are provided by IORY. In Clark County, WestCo has three railways that connect Springfield to the region and to help continue IORY's service.

IORY is based out of Cincinnati and runs from Cincinnati to just north of Toledo through Springfield, and east to Columbus. In Clark County IORY comes through the northwest portion of Clark County into the City of Springfield, and from there it meets up with WestCo and NS.

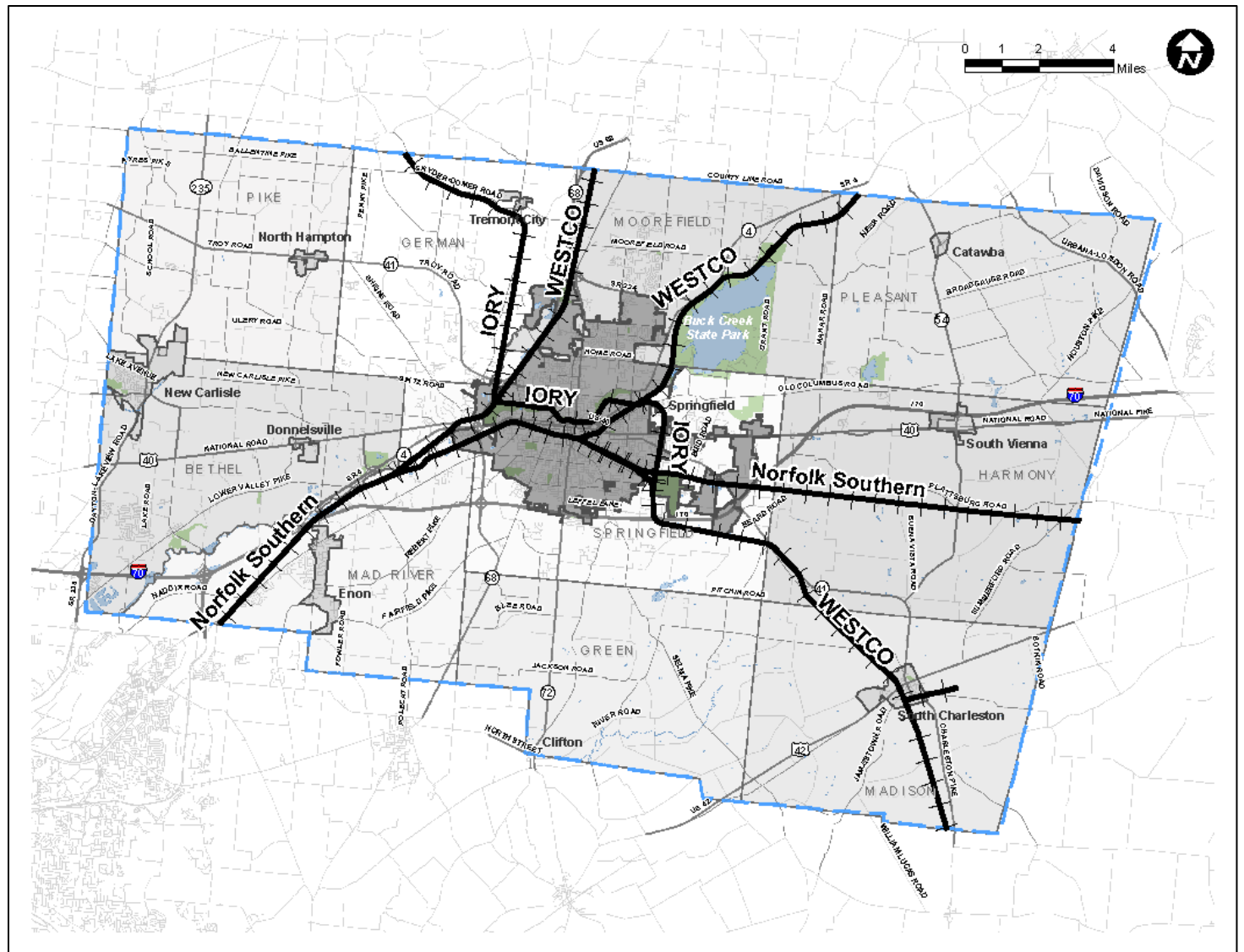
NS is a major transporter of raw materials, intermediate products, and finished goods across the eastern, mid-western, and southeastern United States. In Clark County, NS it has one railway coming into the City of Springfield from Columbus to the east, which turns south towards Dayton/Cincinnati.

Although Clark Co has these rail systems running through it, due to the lack of multi-modal hubs and companies leveraging the rail, the rail system is underutilized in terms of generating economic growth in the County.

Transportation Analysis

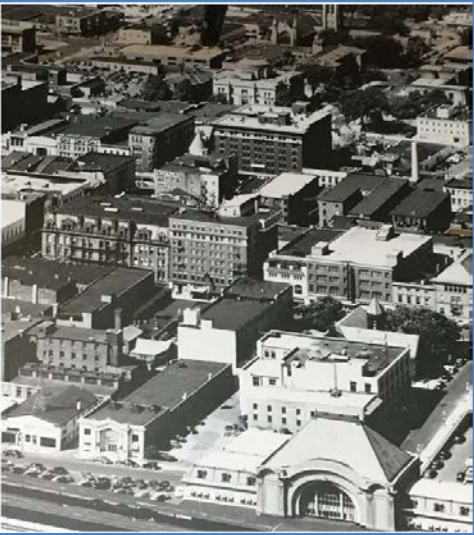
Current Transportation Summary

Figure 6: Railroad Location Map



Draft

CONNECT CLARK COUNTY *Strategic Recommendations*



*Submitted to Planning-Next on behalf of
Clark County Government
September 29, 2017*

Randall Gross / Development Economics

INTRODUCTION

This report provides Strategic Recommendations for Economic Development for Connect Clark County. The strategic recommendations were developed based on analysis conducted through a Baseline Economic Analysis as well as a Target Industry Assessment for Clark County. Input from stakeholders was also gathered through an “Economic Visioning” session held with members of the business community. Additional input has been gathered through a Business Survey, as well as through focus groups held with representatives of key sectors within the local economy.

The first section of this report provides a summary of findings from the business survey and focus groups, which generated input not only to the target industry analysis but also to the formation of strategic recommendations. Section 2 provides key recommendations to help guide the county’s economic development efforts as well as planning and development in coming years.

Section 1. STAKEHOLDER INPUT: CLARK COUNTY BUSINESS SURVEY & FOCUS GROUPS

This section provides a summary of key stakeholder inputs that helped to guide the formation of these strategic recommendations. Stakeholder input has been gathered through an “Economic Visioning Session” held with business leaders through the Chamber of Greater Springfield, through the project Steering Committee, and through personal interviews with businesses and real estate professionals, output from which was described in the Baseline Economic Analysis Report. Additional input was since gathered through a Survey of Clark County Businesses and through a series of Focus Groups held with representatives of various specific business sectors in Clark County. The results of these latter two efforts are described below.

Business Survey Results

An online Survey of Clark County Businesses was conducted in June and July, 2017 via SurveyMonkey. The survey received responses from over 100 businesses located throughout the county. About 87% of the businesses are based in Clark County. Responding businesses have been located in the County for an average of 23.7 years, although they range from businesses that only located in the county within the last six weeks to several that have been in the county for more than 60 years.



Ownership

About 67% of responding businesses own their facilities and 33% rent. These businesses employ a total of 6,290 people in Clark County, with an average of 134 and median of 15 employees per business. The businesses range in size from 1 to 2,000 employees.

Real Estate

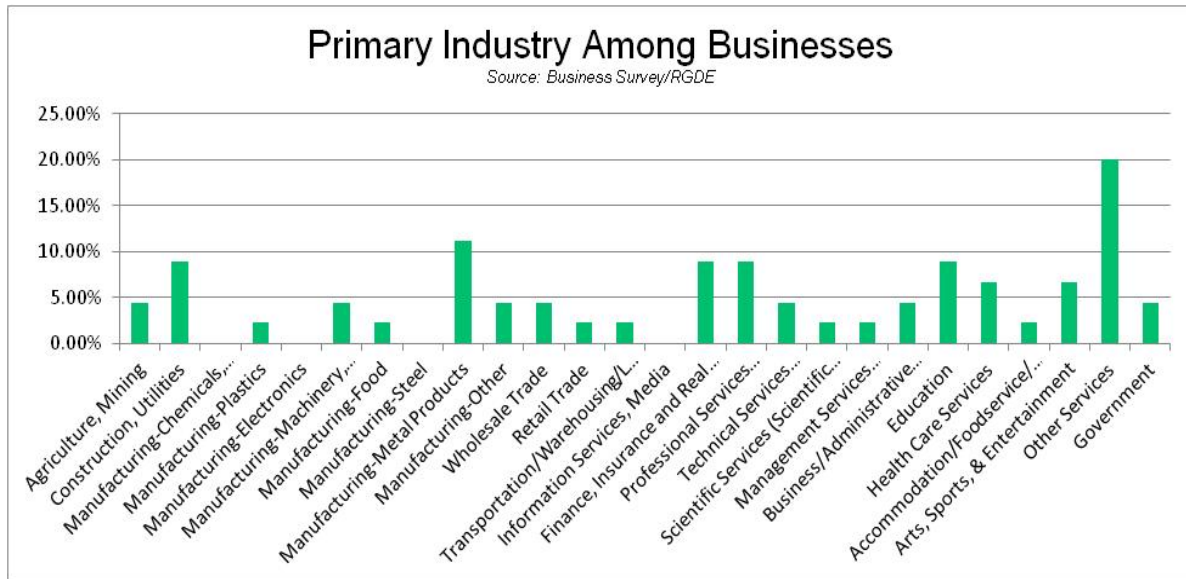
Businesses that responded occupy about 1.6 million square feet of space, for an average of about 48,800 square feet (or a median of 8,600 square feet per business). About 67% of the businesses occupy office, 24% manufacturing, 7% warehouse/distribution, and 2% institutional buildings.

Growth Potential

Somewhat discouraging during a period of rapid national economic expansion, is that only 14% of the responding businesses anticipate any expansion over the next several years. Of those few that anticipate an expansion, they are only adding an average of about 6,600 square feet (a median of just 2,200 per business). These businesses are only anticipating the addition of about 3.8 employees on average, for a total of 27 new workers. About 50% of those would be professional/technical, 20% executive or administrative, and 30% basic labor.

Business Sector

The survey generated a good response from a mix of at least 22 separate business and industry sectors. The largest share (nearly 20%) represented “Other” services not otherwise listed. Key industry sectors included metal product manufacturing, FIRE (finance, insurance and real estate), professional services, education services, construction, health care services, and arts & recreation services.

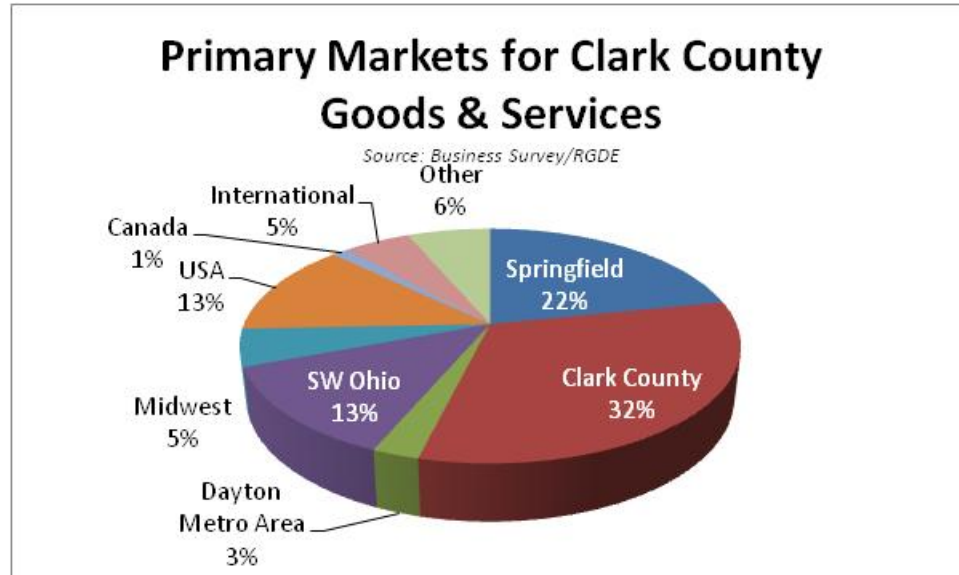


The diverse products offered by responding businesses ranged from legal services to fiberglass conduits & bridge drainage, live band performances to solid waste disposal.

Market Base

Clark County is the primary market in about one-third of business responses, while Springfield itself is the primary market for 22%. Thus, more than one-half of the market for Clark County businesses is derived locally. This is problematic if the local market base is stagnant or declining, both demographically and economically.

Chart 1



Another 13% of the Clark County business market is generated from a broader region of Southwest Ohio. While this is somewhat more sustainable, the region (e.g., Dayton-Cincinnati) as a whole is growing and producing at a lower rate than national averages. Surprisingly few businesses listed Columbus or central Ohio as their primary market, despite the fact that it is relatively close and is a large and growing market for goods and services.

Inputs

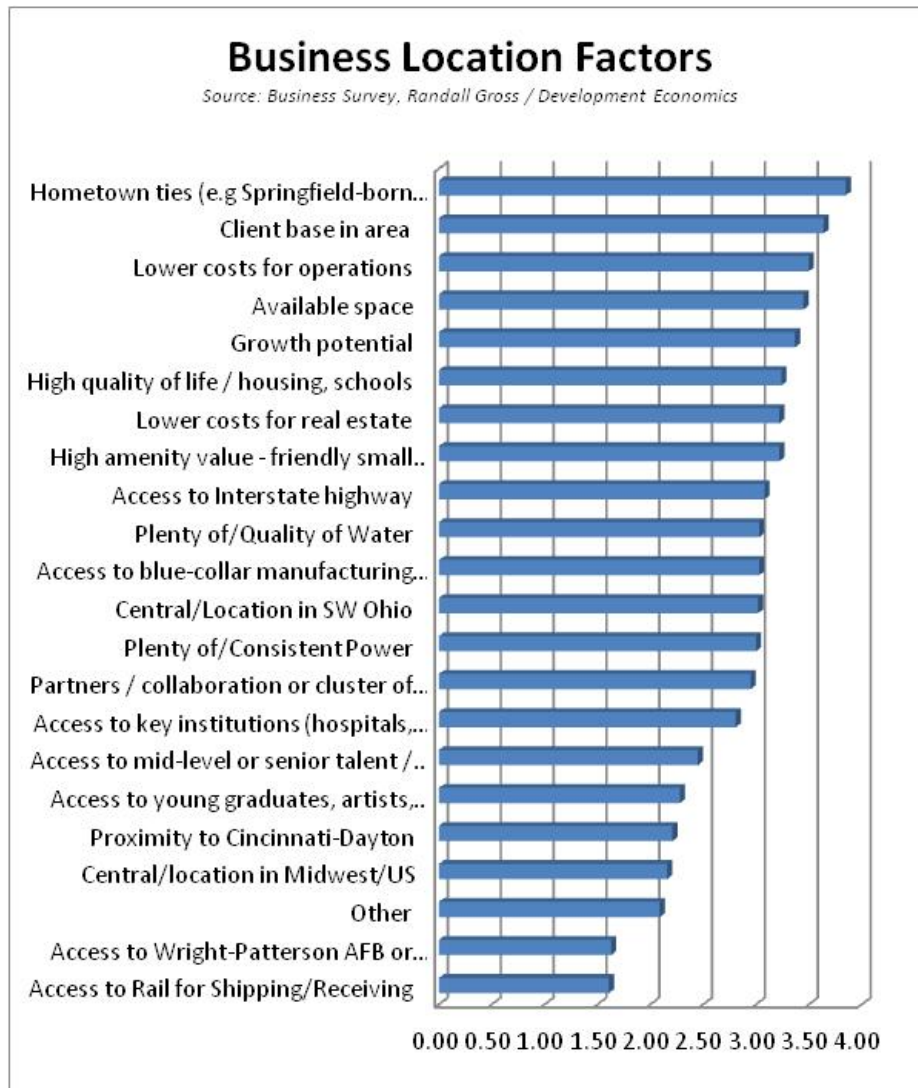
Businesses were asked about their inputs and a surprising number listed steel as their primary input for production or services. Ohio has a long-standing manufacturing base in steel (as part of the so-called “Rust Belt”) and this continues to prove a competitive advantage for attracting and retaining businesses that use steel and metals in the production of their finished product (which in Clark County includes primarily machinery and equipment. Components used specifically in the transportation industry are an important and growing use for metal and steel inputs throughout the region.

Clark County Business Location Factors/Advantages

Information was collected from businesses in various ways to determine what drove their decision to locate or stay in Clark County, as some indication of the county’s competitive advantages. The #1 reason given for why businesses located in the county was the fact that the owner had hometown ties to the county, such as being born and raised in Springfield. But also important was the fact that businesses have a client or customer base located in the area that draws them to remain close. As noted earlier, a significant share (over 50%) of surveyed

businesses primarily serve a local market. Thus, their dependence on those local clients and customers is what keeps them here.

Chart 2

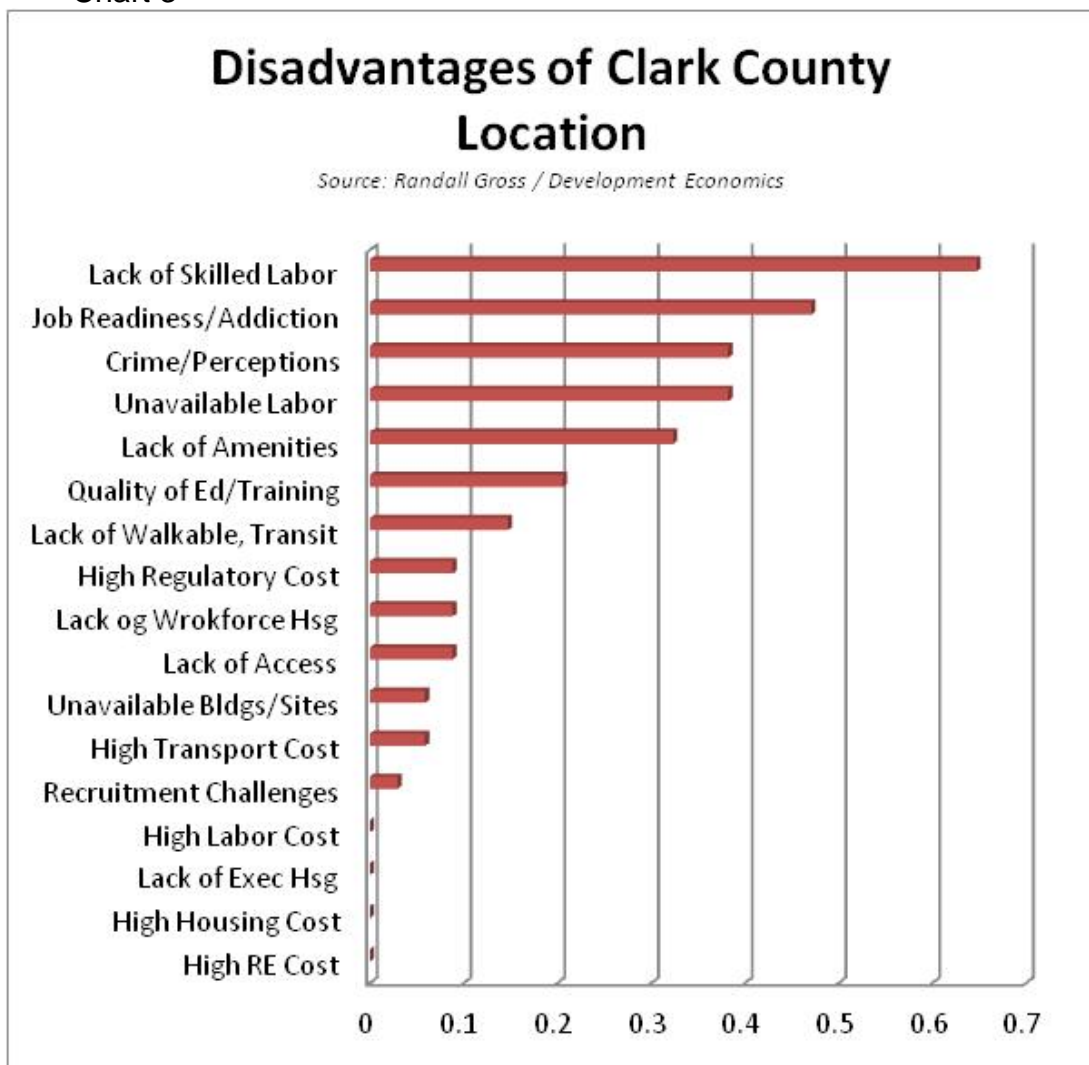


Other key drivers for locating in the county include lower operating costs and available space. Some businesses located in the county because there was perceived to be growth potential. However, only a handful of businesses appear to be gearing up for growth in the near term, so it's not clear if that reason is still valid. Some businesses noted the friendly, small town way of life and lower costs for housing and real estate as incentives to move ones family as well as business to Clark County. On the County's competitive advantages, more than 50% of businesses noted its central location, followed by lower labor and real estate costs (37% each).

Clark County Business Location Disadvantages

Many of the factors impacting negatively on business in Clark County relate to the labor force. The lack of skilled labor was listed as the #1 disadvantage of locating in Clark County, according to surveyed businesses. This is followed by issues relating to a lack of job readiness and addiction, which is plaguing not only Clark County but the southwest Ohio region as a whole. Inter-related to the addiction issues are problems or perceptions of a problem with crime and personal safety. Still relating to the labor force, the 4th most significant disadvantage is “unavailable” labor in general, not only skilled, because of a decline in the local labor force.

Chart 3

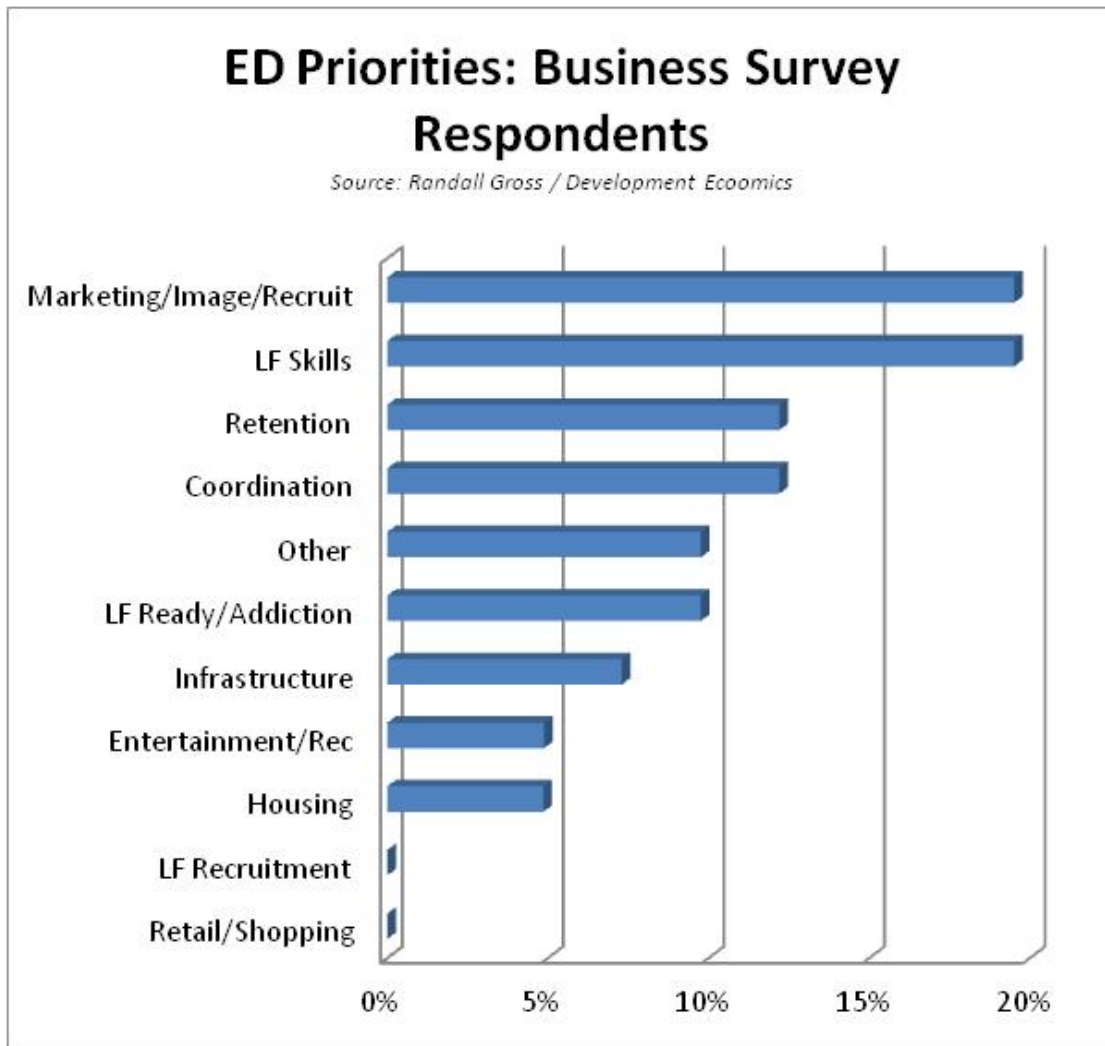


Lack of public amenities also factored highly in the list of disadvantages impacting on perceptions of Clark County as a business location.

Economic Development Priorities

Businesses stated their preferences for how to prioritize economic development initiatives in the county. The highest priorities, according to local businesses, include a dual focus on marketing & image enhancement as well as on labor force skills development. As the labor market tightens with improving national economic conditions, businesses are desperate in some cases for skilled workers. So, focusing on skills that will drive the region’s economic future is, not surprisingly, a high priority for local business.

Chart 4



Among the specific recommendations provided by businesses through the survey were for the county to seek ways to retain youth after graduation, to work more aggressively on fighting the opioid epidemic, focusing on over-turning the negative image associated with crime, and improving coordination and cooperation between the City, County and various economic development entities.

Business Focus Group Input

As noted previously, focus group discussions were conducted with businesses within selected industry sectors. These discussions helped collect more specific input on key sectors on both the challenges as well as opportunities for Clark County to strengthen its position for economic development. A particular focus on quality of life issues (culture, housing) was also considered. Key findings from these discussions are provided below.

FIRE, Administrative and Professional Services

Businesses in the financial sector are seeing growth in local lending to small businesses, with increased confidence since the end of the recession (8 years earlier). There is, however, a lack of statistical and other information on the local markets that impairs the ability of lenders to make appropriate investment decisions. Much of the local market for finance and professional services is driven by what happens in the area's manufacturing sector. Manufacturing drives building expansions and construction, as well as demand for products and equipment. Since many of the finance and professional services firms in Clark County serve a local market, there is not much outsourcing. Yet there may be opportunities in Clark County for outsource operations for larger national companies.

Manufacturing & Food Production

Some local manufacturing companies are growing, with at least one company doubling in size over the past 5-6 years. The issue of concern now for many Clark County manufacturers (as with many companies nationwide) is the lack of available workforce. Among those available workers, there is the problem of job willingness and readiness for work. Some companies find that they spend more time training people in Clark County due to their socio-economic backgrounds. Problem-solving skills are highly sought-after and often lacking. Among the biggest and urgent challenges is finding assembly operators, who help maintain robotics engaged in the assembly process.

Existing programs such as All About Me (job fair, etc), Internship Collaborative, Straight-A Consortium and Manufacturing Collaborative have varying degrees of success and participation, according to the focus group participants. Among the issues discussed through the collaborative is how to maintain thin profit margins while there is increasing pressure on wages. Manufacturers are derided for offering relatively low wages, yet the profit margins are so thin in some types of production that there is little if any room for wage growth. Participants felt that the collaborative should do more to educate the local leadership about this issue.

There is also a perception of favoritism in the Chamber's marketing of local products. Some locally-based companies refuse to purchase inputs from local

suppliers, despite their common interest in growing the local economy. Finally, there was some thought that the community college should engage in more outreach to prospective students and others.

Arts & Culture

Focus group participants represent arts and cultural organizations with a combined total attendance of about 80,000 to 90,000 per year. Clark County has a significant base of cultural and recreational amenities, but there is a feeling among focus group participants that there needs to be stronger internal and external messaging about these assets. Heritage assets like the National Road seem under-developed and marketed in Clark County, despite their national prominence. There was a need identified for more collaboration and cooperation to promote arts, heritage, cultural, and architectural resources. It was recognized that the arts play a crucial role in placemaking, which is essential to amenity value and quality of life in attracting and retaining business. Because of Clark County's proximity to Columbus, Cincinnati, and Dayton, it finds itself in competition with larger venues for audience. On the other hand, the central location provides an opportunity for destination activities.

Housing

Among the various housing and real estate participants in this focus group, the discussion related to the disconnect between the cost for developing raw land and subdivisions in comparison to the market price for housing. The discussion shifted to redevelopment of existing housing areas, many of which suffer from disinvestment and neglect. There is the perception that the tap fee structure provides a disincentive to redevelopment in order areas, so restructuring those fees could help leverage some redevelopment. The lack of assembled land, poor road standards, and other issues compound redevelopment constraints. Since many of the local builders are small, there is the opportunity to partner with larger developers who can absorb more up-front capital costs for redevelopment.

CBDG funds are typically used in Clark County for roads, and not for housing rehabilitation. Yet, that is a source for potential investment in rehab. Part of the problem is the median household income is higher than comparables in the state, so funding cannot be targeted. Perceived competition between the City and the County only compounds some of the issues with housing in Clark County.

Section 2. STRATEGIC RECOMMENDATIONS

This section provides draft recommendations for labor force development, image & marketing, and business recruitment based on the economic base and target industry assessments, along with stakeholder input from the visioning session, interviews, business survey, steering committee, and focus groups. These recommendations are summarized below.



Labor Force Development

There are already several initiatives aimed at enhancing and developing the area's labor force to be competitive in attracting and retaining business. Among these existing programs are (as noted in other sections of this plan), the following:

- All About Me: Career fair, communication and outreach efforts
- Clark County Internship Collaborative
- Straight A Consortium/"Dome" (an innovative learning hub)
- Clark County Manufacturing Collaborative
- New Certification Programs (TAACCT)

As noted earlier, these relatively new programs have already met with some degree of success, but there is also a desire to see more direct and aggressive action among some companies. To address some of the issues and concerns raised by stakeholders and through the target industry analysis, the following additional program concepts are recommended for Clark County:

- **"Your Hometown" Program.** The purpose of this program would be to retain and attract high school and college graduates who are native to Clark County. So many of the local graduates leave the area for college and work elsewhere but do not return. So, this program would aim to attract them to stay, since this prospective labor force already has familial and other ties to the community. The timing couldn't be better, as a growing number of Millennials and young graduates reconsider the small town lifestyle of their home communities. The program would offer tuition reimbursement or matching grant programs in partnership with area businesses. The program would also offer networking among Clark County graduates to link them with local area jobs, housing, and business opportunities. Finally, the program would link with retail, arts, culture, recreation and entertainment organizations and initiatives to highlight the strong quality of life offering in

Clark County. Efforts like Mother Stewart's Brewing Company and others would be highlighted due to their appeal to young workers.

- **Labor Force Recruitment Program.** This program would focus on recruiting a strong workforce to Clark County through a variety of similar mechanisms to those described above, including housing or tuition reimbursement, partnerships with housing providers and downtown businesses, and the packaging of attractive apartment/housing and entertainment options. This effort would have a more general broad reach than the Hometown program.
- **Healthy Community Initiatives.** The current health crisis plaguing southwest Ohio deserves a strong and targeted response because of its impact on the area's people as well as on the health of the workforce and the region's economic competitiveness. Such initiatives would focus on education programs relating to drug use and addiction, free health club memberships, recreational amenities and cultural activities, food culture and other factors that impact on health but also provide outlets for recreation.

Image and Marketing

Again, there are existing programs already in place to market the area and establish a strong brand. The Chamber has re-branded itself to "Expand Greater Springfield" and staff attend trade shows, conduct various outreach, and produce materials and websites to promote the area. The Chamber has received awards and recognition for its effort. There has also been an attempt to brand the broader I-70 Logistics Corridor in a way to draw attention to the area's competitive advantages for transportation and logistics. There are several additions proposed here to expand or strengthen the area's marketing effort as described below. I



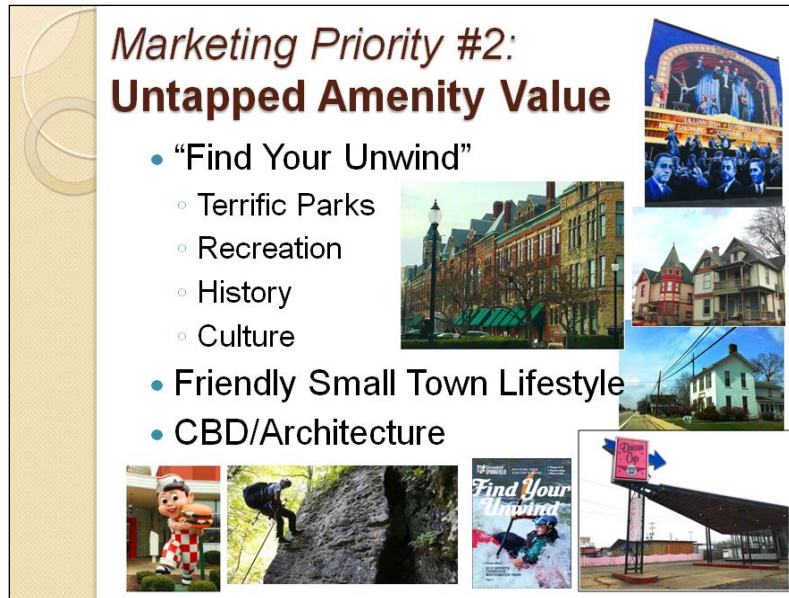
- **"Heart of a Growing Region:" Regional Labor Market.** It is highly recommended that marketing focus on the county's location in a larger, growing region, with a consumer market of 2.3 million and a labor force of 1.9 million (up by 22,000 workers or 1.2% since 2010). While most of this growth has been concentrated closer to Columbus, Clark County is nevertheless part of this broader commutershed region. So, marketing materials and business recruitment efforts should always provide an indication of how Clark County is situated within this larger, growing labor market that is so critical to sustaining business in today's labor environment. Clark County is also part of the I-70 Logistics Corridor, and serves America's North-South Auto Corridor.



- **Integrate Tourism and ED Branding.** The CVB is marketing the area based on its amenity value, a place to “Find Your Unwind.” Certainly the community’s strong asset value in downtown, recreational amenities, architecture, and cultural heritage can be tied directly into economic development marketing efforts to focus on the wonderful small-town lifestyle appealing to many people. A community education campaign might focus on this amenity value to help retain workers and strengthen the relationship with existing businesses.

**Marketing Priority #2:
Untapped Amenity Value**

- “Find Your Unwind”
 - Terrific Parks
 - Recreation
 - History
 - Culture
- Friendly Small Town Lifestyle
- CBD/Architecture



- **Affordability.** Certainly affordability is a factor that was repeated as key to the choice of Clark County as a business location and as a competitive advantage. There is affordable housing for workers, affordable (and significant available) business real estate, and low labor costs in comparison to much of the country. The area has \$6-10 per square foot commercial rents and \$110,000 median housing prices. With rapidly escalating prices in some regions, this factor can be of significant appeal. Again, marketing and recruitment efforts should emphasize this factor in decision making.



Business Recruitment

This strategy has an emphasis on business recruitment and development. While there are existing programs and efforts to recruit business and industry to Springfield and Clark County, some suggestions are provided here based on the findings of the refined target industry analysis and stakeholder inputs. Existing

efforts including target industry recruitment, marketing and promotion, the Logistics Corridor and cluster effort, and development of industrial parks including Prime Ohio II and Champion City.

Incentive Programs

Recommended programs are focused on the packaging of incentives as follows.

- **Package Existing Affordable Office/Commercial Space.** There is an opportunity to diversify the business formats marketed for recruitment beyond just industrial space. Prime opportunities include the oversupply of space available for back office (administrative services, processing), artisanal maker space, and collaboration space (IT/web-based operations).
- **Skills “Packages.”** There is also the opportunity for labor force “matchmaking” programs and collaborations to “package” skills for target industry markets.
- **Downtown.** Finally there is the opportunity to “package” quality of life (including downtown) with tourism and business development incentives. Such packaging can include fiscal and financial incentives (property tax abatements, façade grants & loans), while encouraging mixed-use/entertainment and downtown housing development. Use CDBG funds for rehabilitation of housing in key corridors leading into downtown. A focus on local heritage can also help not only in boosting tourism but also drawing attention to the community’s amenity value for business recruitment.
- **Preservation & Adaptive Use.** Because of the county’s rich architectural heritage, it is important to promote preservation and adaptive use through the existing historic districts and use of historic tax credits, coupled with local fiscal incentives mentioned above.



Strategies for Key Targets

Business recruitment strategies are discussed below as they relate to specific existing and refined target sectors and industries.

Administrative Services. Key target industries within this sector include business services, customer service, and processing (often located as “back office functions”). As noted in the target industry analysis, this represents a growth sector ideally matched to the regional labor market and skills set, with Clark County (Downtown Springfield and heritage industrial buildings in particular) and its affordable supply of office space providing an opportune location for these activities.

- It is important in marketing for this sector to highlight, engage, and collaborate with the regional labor market.
- Engage with financial and business institutions in Cincinnati, Dayton, Columbus on the need and opportunity for back-office operations.
- Establish processing hubs, incentives, and infrastructure (e.g., high-speed Internet access) to support back-office operations.
- Focus on recruiting small web-based IT and administrative support companies using vacant/underutilized building space as “lure.”
- Tap into historic tax credits as well as state programs to package incentives as described earlier.
- Highlight and market Downtown Springfield’s growing number of food, specialty goods, and entertainment venues

Arts, Culture, and Recreation Services. The county has existing assets and strengths that support this sector, which can be used to build amenity value for attracting businesses and retaining or growing the educated labor force. Such services also help to build the local brand, enhance tourism and increase business sales, while promoting opportunities for entrepreneurship. There are affordable, underutilized building spaces that could be adaptively used for artisanal businesses or for art, culture and recreation. Finally, such uses can help enhance community character and pride-of-place. Key strategies associated with this sector are discussed below.

- Promote recreation and cultural assets not only for tourism but also for business recruitment and retention
- Attract “artisanal” (small batch) makers and producers using underutilized/vacant yet affordable space as a “lure.”
- Focus on Downtown and Rural Areas for these uses.
- Assess venue opportunities and attract operators.
- Enhance existing arts, culture, and recreation facilities.
- Recruit an art-related college to increase the region’s competitiveness for arts & cultural enterprises.

- Identify underutilized but adaptable office and commercial spaces for venue locations.
- Facilitate cooperative relationships with building owners to recruit arts, culture and recreation uses.

Fabricated Metal Products. There are existing clusters and concentrations in several metal products industries in Clark County including manufacture of springs, metal containers, and metal trailers; as well as the process of metal heat treating. The county benefits from regional competitive advantages including the concentration of steel and metal suppliers, a trained and experienced labor force, the broader metals cluster and a distribution and market base. Key strategies for business recruitment within this sector are outlined below.

- Focus on labor force development to meet the needs of the sector.
- Work with existing companies on diversification and product development.
- Establish a Fabricated Metals Regional Product Development Center.
- Collaborate with logistics and food production networks in Ohio and the Midwest.
- Facilitate building and site identification, and relocation of companies.

Agribusiness, Food Processing & Technology. While the Chamber has already designated Agribusiness as a target industry for recruitment, additional research suggests more detailed targeting of specific opportunities. Existing clusters and concentrations include dairy products, seasonings & dressings, fertilizers, lawn & garden tractors, and refrigerated warehousing. Key strategies for business recruitment within this cluster include the following.

- Embark on more pro-active marketing and promotion of this sector.
- Attract “artisanal” food production.
- Recruit food producers, especially frozen and refrigerated products.
- Strengthen linkages between this cluster and the logistics corridor.
- Focus training and labor force development within this cluster.
- Identify underutilized buildings and sites for small-batch production.