

2015

SR 66 Relocation Project --The Economic Consequences of a Truck Bypass



Center for Regional Development

Bowling Green State University

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Executive Summary

The Center for Regional Development at Bowling Green State University was contracted by the Village of Archbold to assess the economic impact of a proposed relocation of SR 66 to the County Road 24 Corridor. One of the major factors driving the need for an alternate truck route for the Village of Archbold is the growth and development of industry within the village. There has been significant growth of facilities that rely on truck transportation, creating a situation where the safe and effective movement of freight, both inbound and outbound, has resulted in a congested and dangerous downtown corridor. Previous studies have identified three broad impacts associated with the construction of a bypass or alternative truck route:

- Potential positive economic impact through attracting new business due to downtown redevelopment or repurposing;
- Potential adverse economic impact on those existing businesses along the original route that are heavily dependent on drive-by or pass-through traffic;
- Potential economic gains facilitated by the bypass along the new route or in close proximity to the new route.

State Route 66, Defiance Street in Archbold, brings traffic and customers to the nice quaint and prosperous downtown with shops and restaurants. Unfortunately, SR 66 experiences an average of 9,800 vehicles per day. This traffic is both a blessing and a curse. The large amount of traffic brings potential customers to the shops, restaurants and service businesses located along the corridor, but also create an unsafe and congested situation when coupled with the truck traffic associated with industry. The trucks turning west & south at the intersection are at risk to cause property damage or personal injury because the intersection was not constructed with the 53' length of most current semi-trucks in mind. Modifications of the intersection are not feasible without demolition of some of the buildings in the downtown.

In 1998 the Ohio Department of Transportation built a new turnpike interchange to serve Archbold and its largest employer, Sauder Woodworking. Unfortunately, big rigs must spend time and money navigating downtown Archbold to reach the interchange. Improving Rd 24 in Fulton & Henry counties to take truck traffic would provide a safe and sensible connection to both the Ohio Turnpike and US 6. This study examines and analyzes the economic impact of the proposed relocation of State Route 66 to the County Road 24 Corridor.

Impact Results in Brief:

- Project would result in increased efficiencies and opportunities for growth
- Combined annual economic impact of \$31 million to Archbold.
- Additional annual employee income of over \$4,671,000
- Annual employment growth of 58 direct jobs

Much of literature reviewed for the purposes of this study concluded that there are rarely negative impacts on communities following bypass projects. Only very small communities, less than 1,000 in population, have a greater potential for being adversely impacted. The single project in the NW Ohio area that was completed recently was the SR 18 relocation in North Baltimore. The impacts there have been positive with reduced vacancies and an improved environment in the downtown. The Wisconsin Department of Transportation undertook a large study of 17 bypass impacts from 1996- 1998. They analyzed data from before and after the bypass projects, conducted focus groups and undertook traveler surveys. They came up with four major overall findings supporting the notion that there is little or no impact on communities from a bypass project.

- Bypasses had little or no adverse impact on communities with populations over 2,000
- Over time, average traffic counts on the bypassed route in medium and large communities were close to or greater than pre bypass numbers indicating a strong economic activity
- Very little relocation of retail incurred as a result of the bypass in the 17 communities studied
- Communities viewed the bypasses as overall beneficial, while understanding the individual business challenges had to be addressed with a proactive approach.

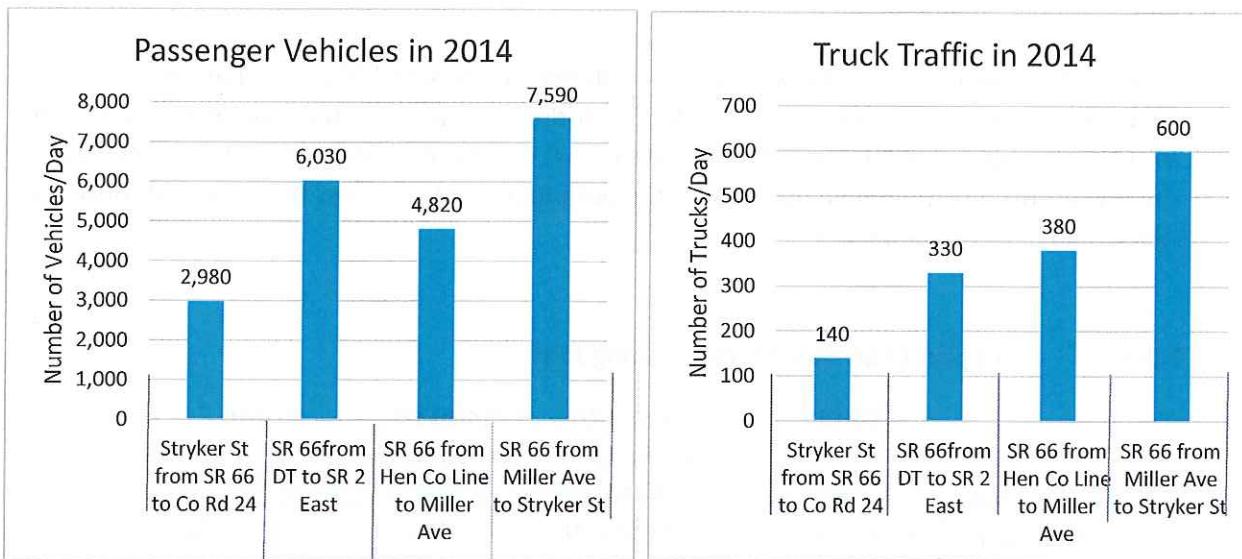
One issue they discussed was that the strength of the existing businesses had as much to do with success after the bypass construction. If a downtown district has a strong core group of businesses, it is more likely to remain so following the construction of a bypass.

A study completed by the University of Kentucky's Center for Business & Economic Research examined 21 existing bypasses in Kentucky found that there was little or no effect on retail employment, total employment and the overall population, even with a reduction in aggregate retail sales. Another conclusion is that a bypass was more likely to promote overall economic growth if it is in close proximity to the communities central business district.

Traffic Flow

The Ohio Department of Transportation provides estimated traffic count data for all the state routes in form of traffic survey reports. The reports are compiled every three years and list an estimate of Annual Average Daily Traffic (AADT) volumes broken down into cars and trucks. The reports are generated using a combination of both short-term and permanent counts collected during the given calendar year.

The graphs below show the most current traffic data available for the road sections that make up the SR 66 corridor. There are still between 8,000-9,000 total vehicles using the corridor and approximately 300 trucks attempting dangerous turns or adding to the congestion in the downtown.



Impacts

This study employed an Input/Output model to make the primary economic forecasts. Input/Output methodology allows the examination of forward and backward linkages that are present in any regional economy. The model was built to produce the regional impact on a four county region consisting of Fulton, Henry, Williams and Defiance counties. The model measures the total annual economic activity that results from inter- and intra-industry transactions. The model breaks the economy into approximately 523 separate sectors with each sector representing an individual industry. It then uses a sectoring scheme developed by the IMPLAN Group and is closely related to the Bureau of Economic Analysis (BEA) REIS model. The model is an approximate 523 by 523 (row x column) matrix that shows all the economic activity between the individual sectors. The entries in the matrix are based on the dollar amount that each

industry sells to (and purchases from) other industries in the Ohio economy. It measures the amount of final consumption by the residents of the region, as well as how much each industry exports from the area. The model uses data collected at the county level, which are obtained from the IMPLAN Group and the BEA. County data is in turn aggregated or “rolled-up” to form service areas such as local areas, states or larger geographic regions such as the Midwest.

Input/Output models estimate economic impacts by taking advantage of the relatively stable patterns in the flow of goods and services within the economy. Predictions can be made of an industry's total economic impact by examining the purchasing patterns of the individual sectors. The BEA collects extensive data on these regional trade flows and reports their findings annually.

To determine the inputs for the model we calculated an estimated 60 jobs gained at the manufacturing companies between the SR 66 corridor and the proposed route of County Road 24. This estimated growth is based on the interviews conducted with each of the companies and represents a conservative estimate of the potential. Table 1 shows the impact of those 60 jobs would have on the region.

Table 1: Impact of 60 New Manufacturing Jobs

	<i>Direct</i>	<i>Business to Business</i>	<i>Employee Spending</i>	<i>Total</i>
<i>Jobs</i>	60.0	31.5	25.1	116.6
<i>Labor Income</i>	\$4,577,384.91	\$1,281,349.90	\$814,844.08	\$6,673,578.89
<i>Value Added</i>	\$7,042,615.17	\$2,193,327.11	\$1,660,227.48	\$10,896,169.76
<i>Output</i>	\$29,384,490.87	\$4,653,981.40	\$2,871,922.02	\$36,910,394.29

We also used the potential negative impacts, calculated as part for the merchant survey, and verified the data with tax records from the Village Tax Office to generate an estimate of the potential loss of business and jobs on the corridor as a result of the project. The potential losses were then incorporated into the model to generate the projected overall impact of the project on the regional economy. Table 2 depicts the results from the model for the overall impact in economic output, jobs, employee income and value added for the combined retail and industrial estimates.

Table 2: Overall Net Impact of SR 66 Relocation

	<i>Direct</i>	<i>Business to Business</i>	<i>Employee Spending</i>	<i>Total</i>
Jobs	14.4	26.3	17.5	58.2
Labor Income	\$2,988,030.17	\$1,114,171.64	\$568,940.99	\$4,671,142.80
Value Added	\$4,548,546.24	\$1,817,797.39	\$1,159,193.00	\$7,525,536.63
Output	\$25,884,191.65	\$4,003,828.88	\$2,005,123.63	\$31,893,144.16

This shows that the potential loss in retail is offset by the industrial gains and the combined overall impact is \$31,893,144 in new annual economic activity.

Merchants and Consumer Surveys in brief

The research team conducted one-on-one interviews with 26 business owners representing 28 businesses along the SR 66 corridor. Several other business owners provided comments to the team after the interview portion of the project was completed. As expected, a majority of the business owners are concerned about the possibility of a loss in business if the construction of a new truck route along the county road 24 alignment is completed. However, the research team's review of empirical data from studies of bypass projects across the country may help lessen the fears.

- Of the 156 shoppers surveyed along the SR 66 corridor 43% are in favor of the bypass and 38% oppose it
- 18 of the SR 66 corridor business owners surveyed were opposed to the bypass
- There are approximately 80 businesses located along SR 66
- It is estimated that 34 of the approximate 80 businesses along the route are considered "traffic dependent"

Key stakeholders in brief

The research team conducted one-on-one interviews with representatives of six industrial firms, three key stakeholders and two real estate companies to assess their reaction to the proposed truck route along the county road 24 corridor. The majority of the companies are located on or immediately adjacent to existing SR 66.

- Majority of key stakeholders and industries in favor of the project

- Real Estate professionals see minor positive and negative impacts on property values based on location.
- There is great potential of growth with an improved transportation route for truck traffic
- The previous relocation of Sauder Woodworking trucks from SR 66 to county road 22 had little or no negative impact on the downtown
- Job creation in the industrial sector has historically lead to improved business sales

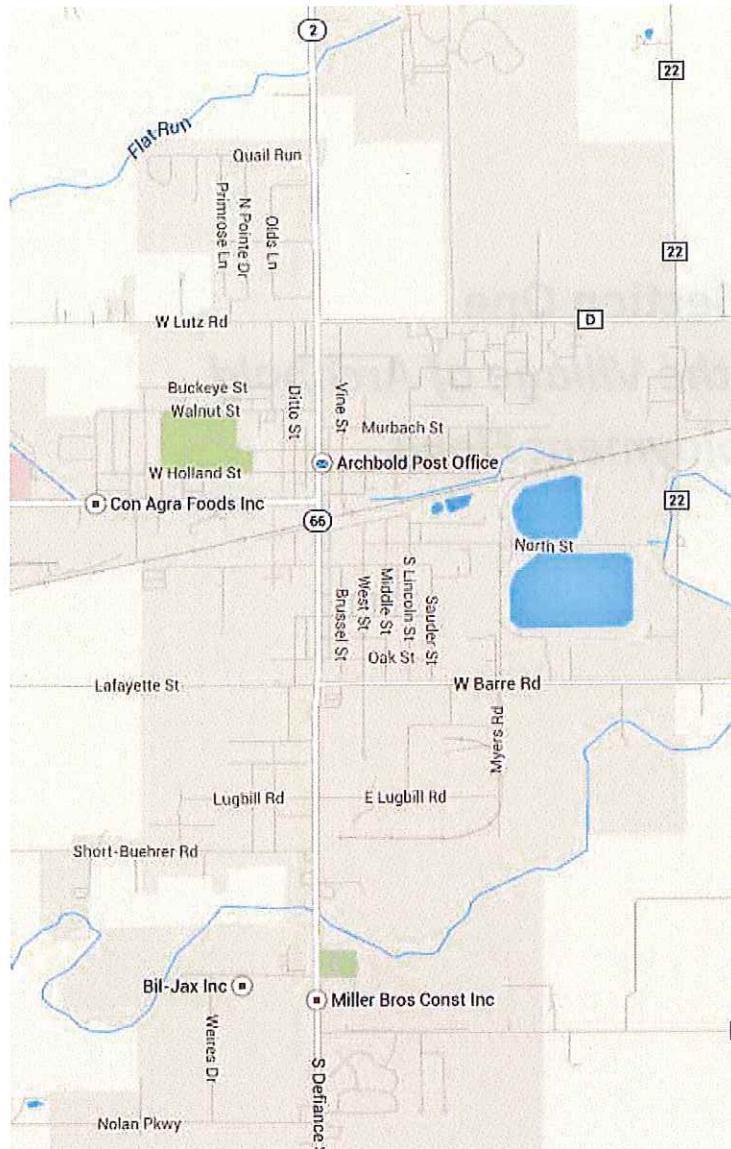
If the relocation of SR 66 to County Road 24 is undertaken, prior research has shown that some advanced planning and innovative strategies can lessen any negative economic impact and will only heighten the positive impacts associated with diverting heavy truck traffic from the downtown core. Therefore, the research team offers the following recommendations:

- Use the bypass project as leverage for redevelopment of the downtown,
- Plan for the new economic environment, providing signage and good visibility for travelers and residents alike,
- Work with Sauder's on reverse marketing of attractions in both downtown and on their site.
- Embrace the change in traffic flows as a positive for residential areas along the downtown corridor,
- Market and promote the downtown as more inviting without the truck traffic.

Section One
Analysis of the Village of Archbold
Employment Flows

Analysis of Archbold Employment Flows

The Village of Archbold is located in southwestern corner of Fulton County. It is the second largest municipality in Fulton County. It is located near the confluence of counties, Williams, Defiance, Henry and Fulton.



The total population of Archbold is 4,346 persons. It has leveled off after a large increase between 1980 and 1990. The most recent projections predict a slight decrease in population by 2014 and then a small gain by 2019 for an overall flat population growth. Household size is projected to decrease resulting in an anticipated 2.3% growth in the number of households.

The Village of Archbold has a median household income of \$48,381, which exceeds the median income of NW Ohio. That income level is 5.0% above the state of Ohio level and exceeds Fulton County's median household income by 9.8%. The per capita income is also tops in the county at \$24,446.

County Name	Count
Fulton	11032
Lucas	5527
Wood	927
Henry	738
Williams	728
Michigan	492

Table 1 and Figure 1 present the number of people coming into Fulton County to work, filtered at a minimum of 200 workers. It demonstrates that Fulton County employers have a very strong reach regionally, even accessing workers from Michigan in fairly large numbers. This inflow of workers can also be seen at the local level. Archbold brings over 4,600 workers into the village according to the most recent numbers. That amount of inflow taxes the existing infrastructure that was designed with much lower concentrations in mind. Modernizing the infrastructure in towns across the county has become a major issue.

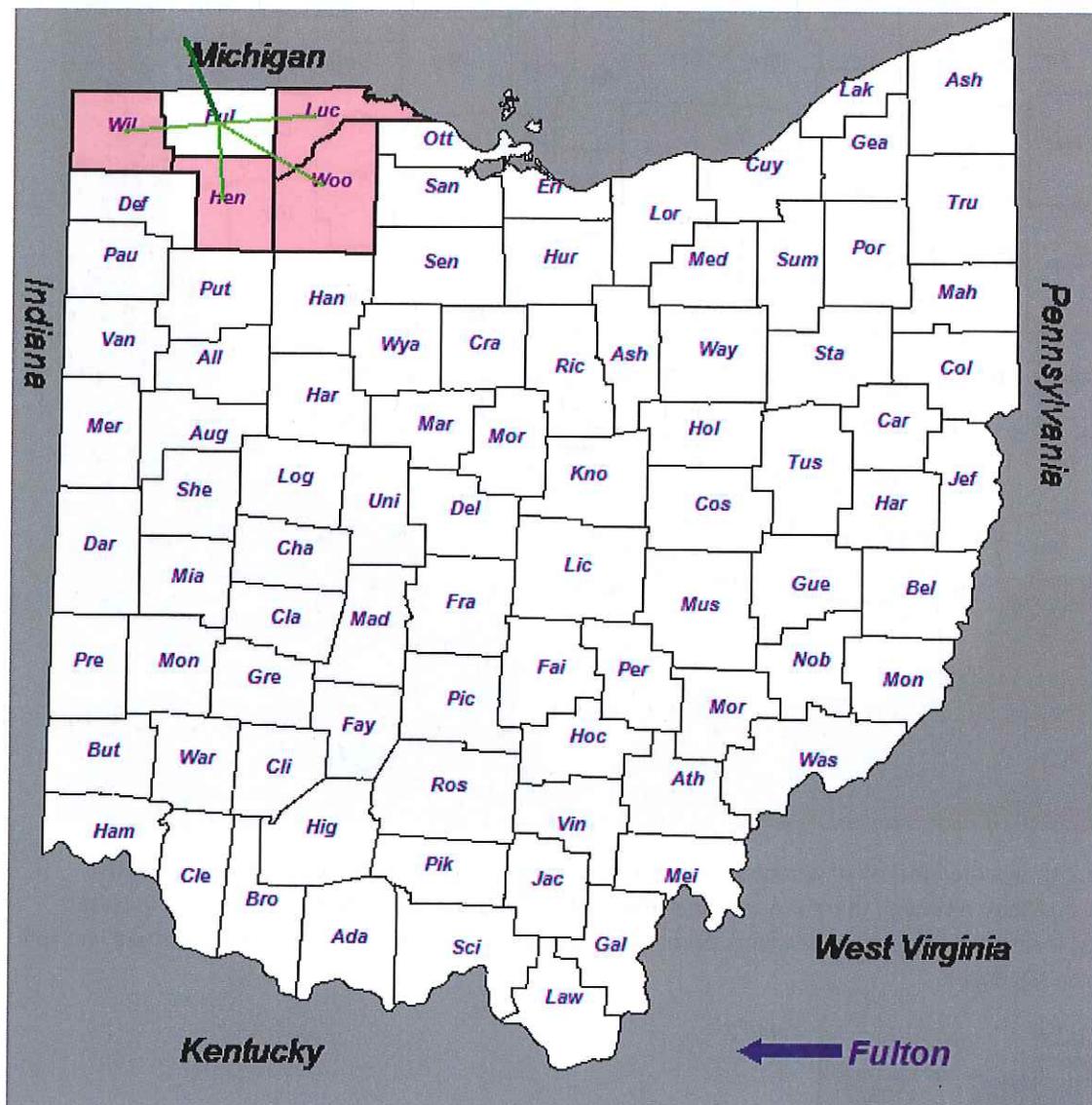


Figure 1: Location of Incoming Workers to Fulton County

Figure 2: Location of Fulton County Residents Workplace

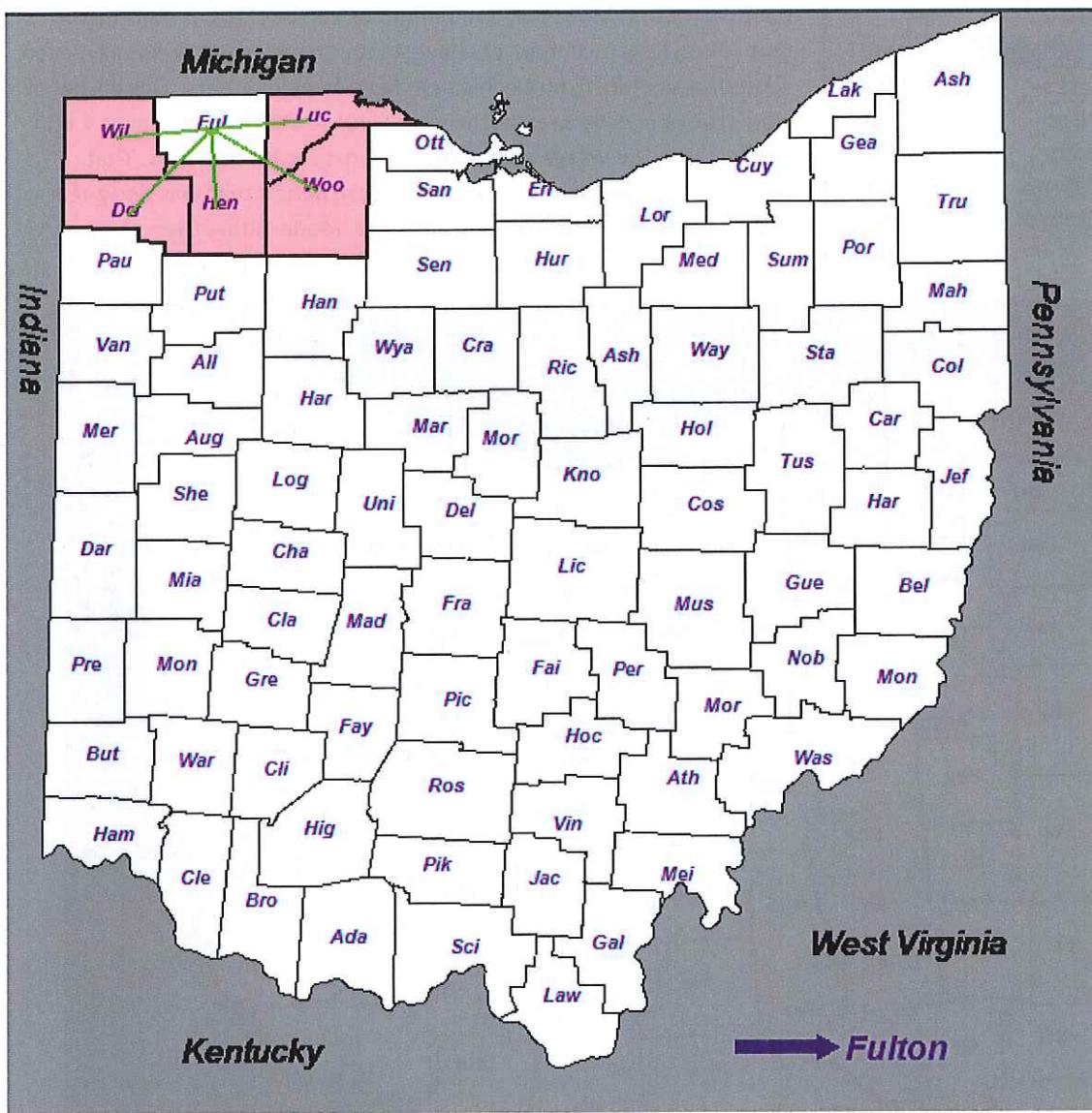


Figure 2 shows the outflow of workers living in Fulton County and working outside the county. It is interesting that, although there are considerable workers crossing the state border for jobs in Fulton County, local residents are finding work primarily in the surrounding four counties. This is virtually no spill over into Michigan.

Table 2

County Name	Count
Fulton	11032
Lucas	5527
Wood	927
Henry	738
Williams	728
Michigan	492

Figure 3 dives a little deeper into the workflow data to show the Village of Archbold. Archbold is certainly a jobs importer. They are drawing nearly 5,000 workers into the village every work day. The map and circle graph below shows the number of people coming into Archbold, the number staying in Archbold and the number that are leaving for employment.

Figure 3: Inflow/Outflow Job Counts for Archbold

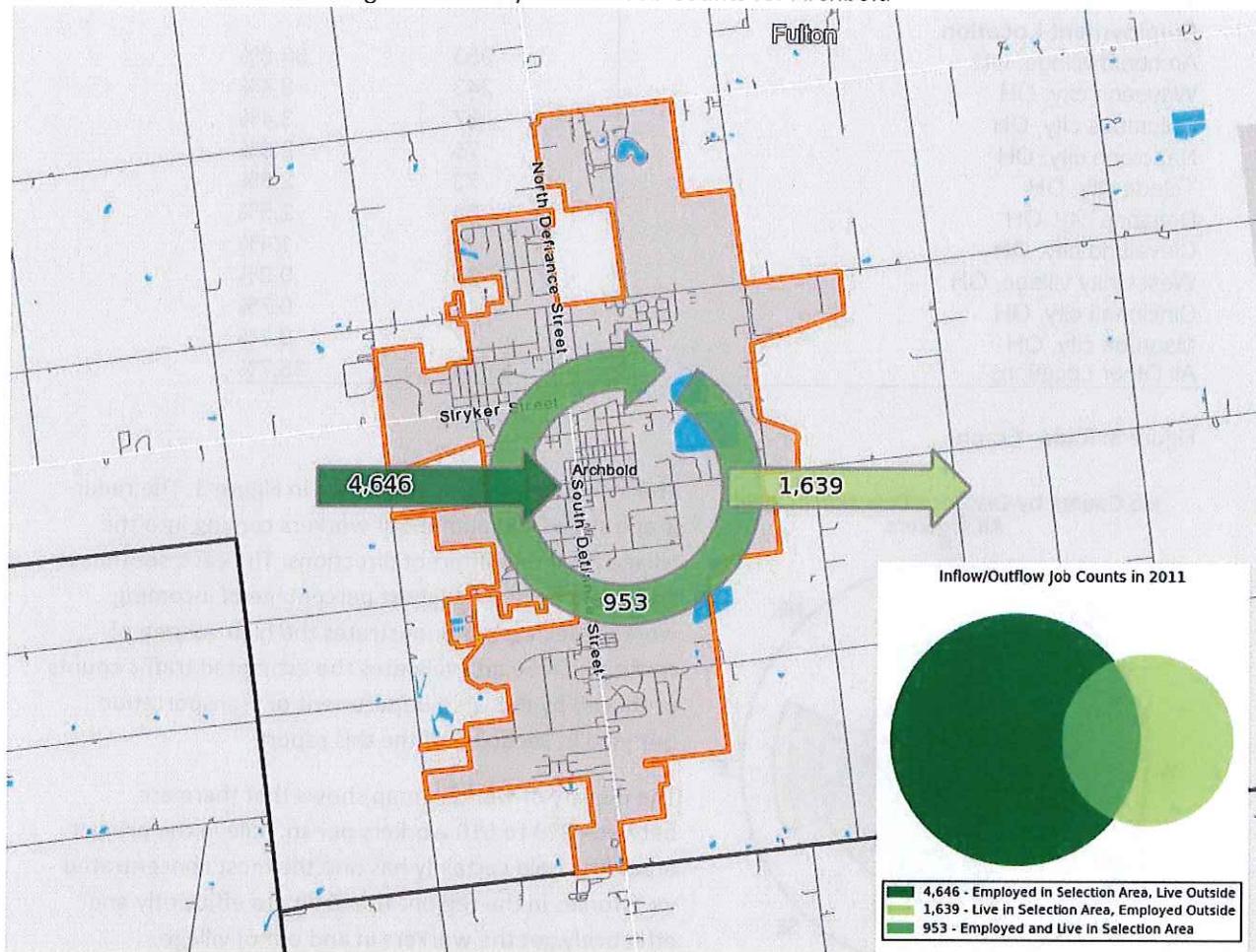
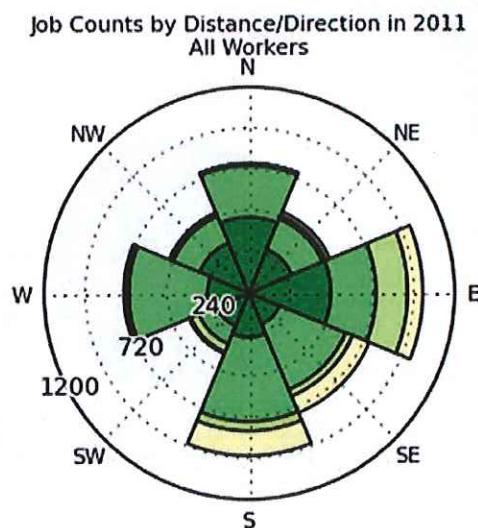


Table 3 on the flow of workers shows where the residents of Archbold are traveling to in terms of employment outside the village.

Table 3: Job Location for Archbold Residents (2011)

Archbold	2011	
	Count	Share
Total Workforce	2,592	100.0%
Employment Location		
Archbold village, OH	953	36.8%
Wauseon city, OH	243	9.4%
Columbus city, OH	87	3.4%
Napoleon city, OH	75	2.9%
Toledo city, OH	73	2.8%
Defiance city, OH	64	2.5%
Cleveland city, OH	35	1.4%
West Unity village, OH	24	0.9%
Cincinnati city, OH	17	0.7%
Maumee city, OH	17	0.7%
All Other Locations	1,004	38.7%

Figure 3: Radar Graph

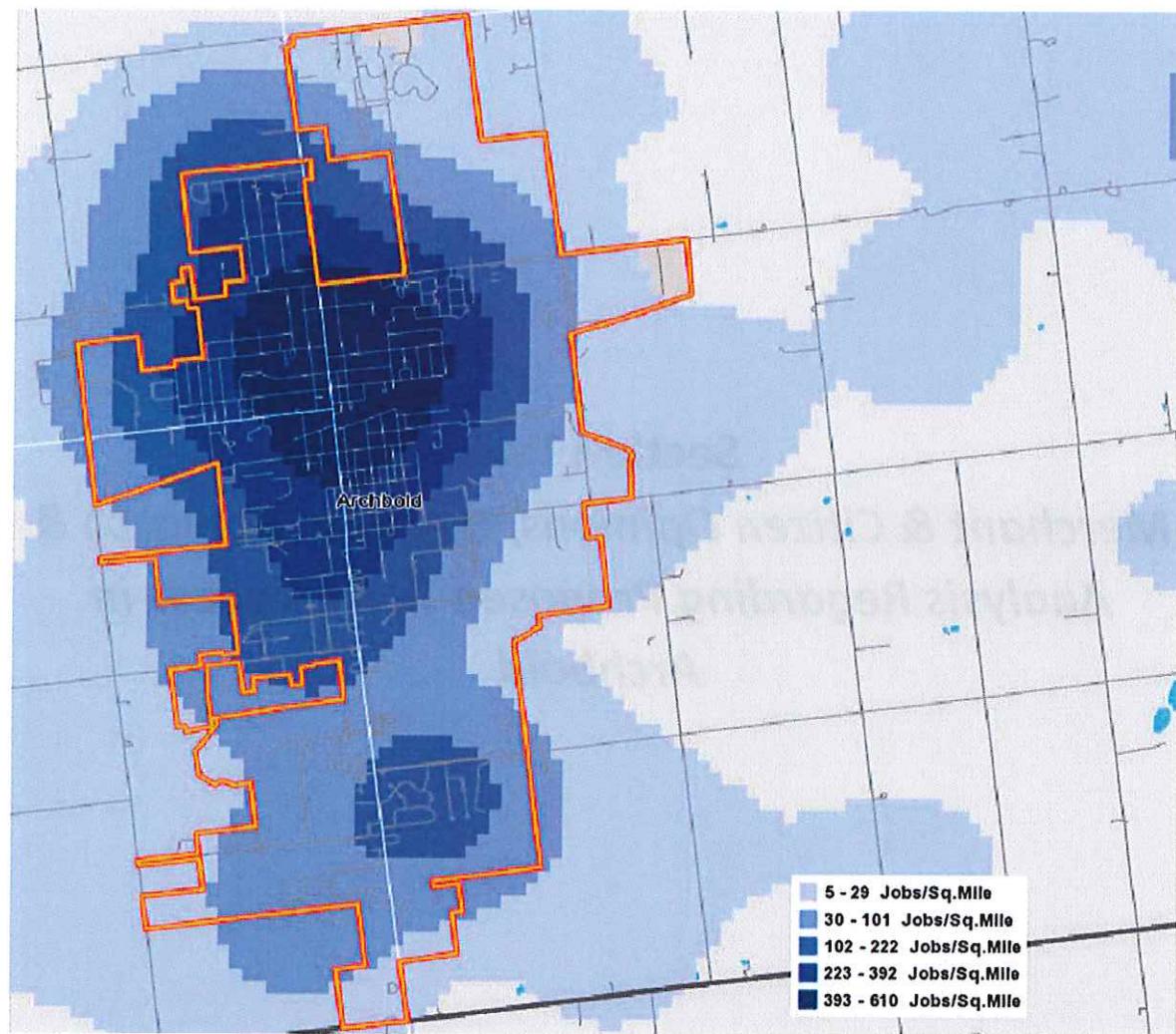


The incoming workers are shown in Figure 3. The radar graph shows the number of workers coming into the village from the different directions. The east, southeast and south have the highest percentage of incoming workers. It clearly demonstrates the high volume of traffic on SR 66 and validates the estimated traffic counts produced by the Ohio Department of Transportation outlined in Section 5 of the this report.

The density of workers map shows that there are between 223 to 610 workers per sq. mile in the project area. Archbold certainly has one the most concentrated workforces in the region. The ability to efficiently and effectively get the workers in and out of village, especially during the peak shift change time is critical. Although the traffic counts have been trending

downward, a renewed emphasis on job creation an existing capacity for growth could reverse it dramatically.

Figure 4: Job Density and Directional Flow for Archbold and Surrounding Areas



Section Two

***Merchant & Citizen Opinions, Business Research &
Analysis Regarding Proposed Truck Bypass in
Archbold***

Merchant & Citizen Opinions, Business Research & Analysis
Regarding Proposed Truck Bypass in
Archbold, Ohio

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1. Introduction

1. Introduction

Project Background

Archbold is a village of 4,336 persons (as of July 2013, according to the U.S. Census Bureau). It is located in the southwest corner of Fulton County, Ohio (population 42,488) close to three other counties

(Defiance, Henry and Williams) in the upper northwest portion of Ohio, nestled close to the Indiana and Michigan borders.

Exhibit 1 – Area Map

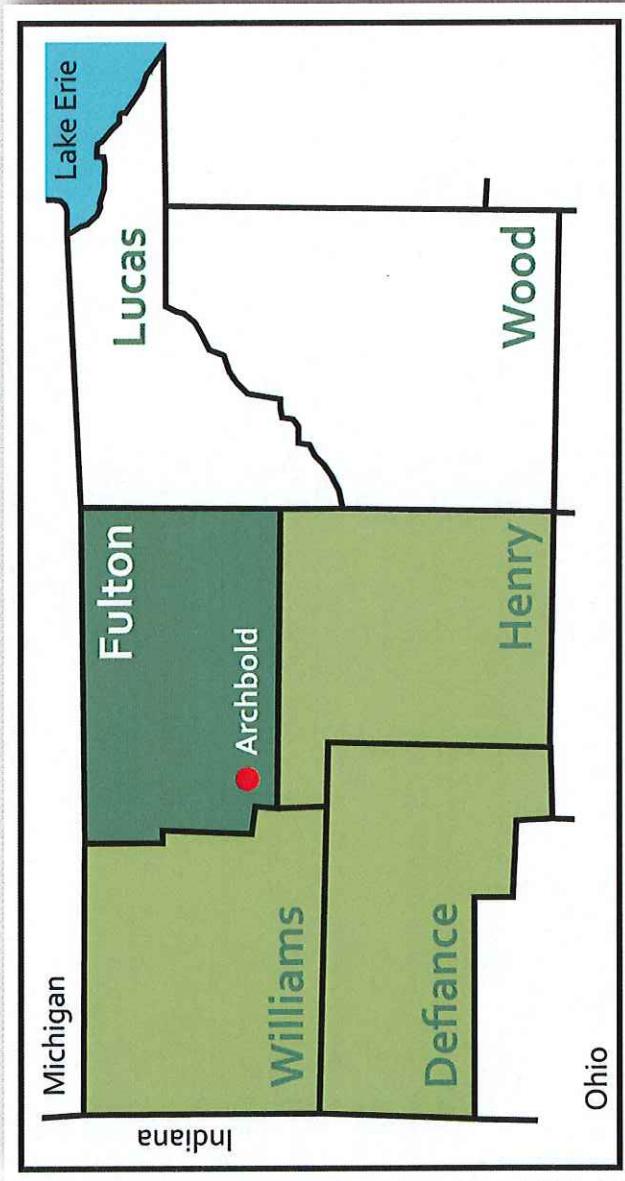


Exhibit 2 - Selected Demographic & Economic Highlights for Fulton County & Other NW Corner Counties

	Fulton County	Defiance County	Williams County	Henry County	State of Ohio
2013 Population	42,488	38,552	37,500	28,092	11,570,808
County Seat	Wauseon	Defiance	Bryan	Napoleon	Columbus
Population Per Square Mile	104	94	89	67	285
% Adults w/College Degree	16.7	16.4	12.9	13.3	25.2
Median HH Income	\$53,059	\$46,377	\$43,176	\$49,423	\$48,308
Retail Sales Per Capita	\$10,742	\$16,339	\$10,404	\$9,784	\$13,538
Retail Inflow/Outflow*	0.79	1.21	0.77	0.72	1.00
Private Sector Jobs	14,580	13,664	14,362	8,298	4,548,145
P.S. Jobs/1,000 Residents Ages 18-65	570	572	634	497	544
Unemployment Rate, Nov. 2014	4.4%	4.0%	4.0%	4.0%	4.5%
Change vs. 5 Years Ago	-8.5%	-8.0%	-10.5%	-8.3%	-5.6%
Manufacturing Employment	6,215	3,284	6,596	2,954	630,548
% to Total Private Sector Jobs	42.6	24.0	45.9	35.6	13.9
Manufacturing Payroll/Year	\$337M	\$204M	\$271M	\$160M	\$33.7B
Retail/Foodservice Employment	2,563	3,526	2,036	1,429	967,910
% to Total Private Sector Jobs	17.6	25.8	14.2	17.2	21.3
Retail/Foodservice/Lodging Payroll/Year	\$47M	\$67M	\$34M	\$26M	\$19.1B
% of Land Area In Farms	75.0	85.6	77.1	88.3	53.3

*Calculated by dividing County retail sales per capita by the state average. Defiance County has net inflow of retail dollars while the other 3 counties, including Fulton have net outflow retail spending.

SOURCES: U.S. Census Bureau, County Business Patterns, Ohio Development Services Agency, Ohio Labor Market Information, and Boulevard Strategies

As shown in Exhibit 2, upper northwest Ohio is a rural, blue-collar region that primarily relies on manufacturing and agriculture industries. Defiance, with a population of 16,836, is the area's largest town.

Otherwise, none of the four counties have even half of the statewide average in terms of population density. Over 80% of the land area in the region is being farmed (vs. 53% statewide).

Only 1 in 6 Fulton County adults has a four-year college degree vs. 1 in 4 statewide yet median household income is 10% above the statewide median. This is a result of a preponderance of manufacturing jobs in Fulton County, 6,215 or 42.6% of all private sector jobs – vs. 13.9% statewide. Annual manufacturing wages are cumulatively 6.7 times higher per year than combined retail/foodservice payrolls in Fulton County (not including tips).

The upper northwest Ohio region has made a big comeback since the lows of the Great Recession 5 years ago. Unemployment is below the state average of 4.5% in all four counties. It is 8 to 10 percentage points lower than it was 5 years ago, a significantly positive swing.

Defiance County is the retail center for the four-county region, as it is the only net retail spending/sales inflow county. Many of those inflow dollars arrive from Fulton County households. Note that Defiance County is a 26% net retail inflow county while Fulton County is a net 28% retail outflow county.

Defiance Street, or Ohio State Route 66, is Archbold's primary commercial corridor featuring a total of about 80 retailers and foodservice establishments. Archbold is particularly proud of its picturesque, well-maintained, pedestrian-friendly downtown that is anchored by seven popular eateries, a large furniture store, and several specialty retailers and service businesses. It is also known for its trains which cross through the center of town, disrupting traffic dozens of times a day for (usually) short intervals.

However, the automotive-oriented stretch of Defiance Street south of downtown to Arrow Tru Line Road has more businesses that are

generally larger and busier than downtown's businesses. It is dominated by vehicle dealerships, farm supply and hardware centers, gas stations, fast food chains, and the like.

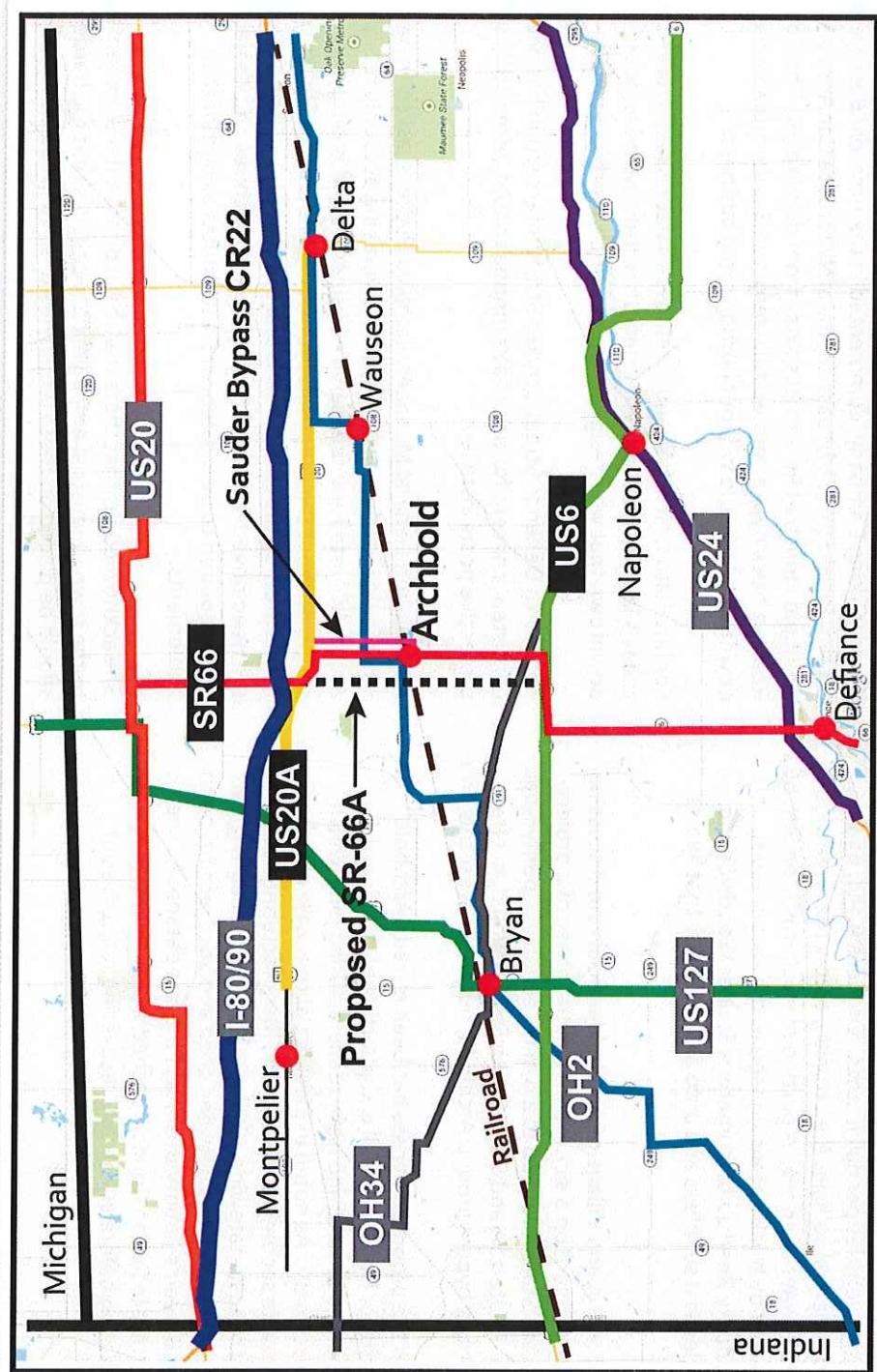
Two miles north of downtown, historic, family-friendly Sauder Village is a significant tourist attraction for a town of Archbold's size. It pulls in hundreds of thousands of family visitors and children's groups from the Ohio/Michigan/Indiana region, especially during warm weather months. Sauder Village's draws include:

- The educational historic village with woodworking, basket making, blacksmith, cooper smith, fabric spinning and weaving, quilting, pottery, glass-making shops featuring artisans and authentic crafts as well as an old-fashioned farmhouses, train depots, barns, schoolhouses, churches, and horse buggy rides all harking back to earlier, simpler days
- Founder's Hall with an exhibit center and wedding, conference, event, and meeting space
- Sauder Heritage Inn with 98 guest rooms, indoor pool, and hot tub
- A campground with 48 sites, bathhouse, picnic shelter and gazebo, and fishing pond
- Shopping at the Sauder Store & Outlet featuring Sauder Woodworking's complete line of ready-to-assemble furniture, Threads of Tradition quilt shop, Lauber General Store, and several smaller gift shops
- Foodservice options such as The Barn Amish-style restaurant and buffet, Doughbox Bakery, and seasonal fare such as ice cream and fudge

Ohio State Route 66 (S.R. 66) is a north-south highway that links Archbold to the Ohio Turnpike (7 miles to the north) and U.S. Route 20 in Fayette, Ohio (13 miles to the north). It also connects to U.S. Route 6 in Montpelier.

(6 miles to the south) and U.S. Route 24 in Defiance, Ohio (19 miles to the south). S.R. intersects U.S. Route 2 in Archbold.

Exhibit 3 - Regional Roadways



According to the Ohio Department of Transportation (ODOT), the average traffic count for the section of S.R. 66 that runs through Archbold was 6,750 vehicles per day in 2011. Of these 6,750, 690 (10.2%) were commercial vehicles (i.e., trucks), below the statewide average for all highways of 16.7%. A portion of truck traffic on S.R. 66 is currently diverted by truck detour signage to the east of town, passing along County Road 22 by numerous Sauder Woodworking Company facilities and suppliers and onto an underpass that avoids train stoppages.

ODOT, Fulton County, and Village of Archbold officials are discussing whether to move forward on a \$17.5 million initial phase of a project that would relocate State Route 66 to a 9 mile section of County Road 24 between U.S. Route 20A and State Route 6. This would, in effect, create another truck bypass around Archbold, but to the west this time.

Local reaction to the proposed bypass has been mixed. Archbold Village Administrator Dennis Howell is supportive of the idea. He believes it will help to protect and grow manufacturing jobs, which drive the local economy. As noted in Exhibit 2 above, 43% of Fulton County's paid private sector jobs were in the Manufacturing sector in 2012, compared to 14% statewide. Still, the County lost nearly 3,000 (32%) of its Manufacturing jobs between 2002 and 2012, according to the U.S. Census Bureau's County Business Patterns database. The unemployment rate in Fulton County reached 13.6% during the peak of the recession in 2009 before eventually recovering to 4.4% as of November 2014.

Mr. Howell points out that "Archbold retail businesses, especially those in home furnishings and building supplies flourished during the growth decades of 1990 to 2010. If we can grow our manufacturing base significantly, the retail base will benefit."

Two of Fulton County's largest employers have major factories and distribution facilities in Archbold – Sauder Woodworking Company on

the east side of town and ConAgra on the west side. Kevin Sauder, president of the Archbold Chamber of Commerce and ceo of Sauder Woodworking Company, commented in the *Archbold Buckeye* that "a County Road 24 truck bypass could safely reroute ConAgra and Archbold Industrial Park trucks away from downtown. The County Road 22 truck bypass successfully rerouted Sauder trucks away from downtown Archbold without hurting retail business."

For Mr. Fulton, "It is first and foremost a safety issue. Trucks that by today's law can reach 75 feet in length will always be a hazard in a downtown that was designed around much shorter vehicles."

The North Defiance Street/Stryker Street intersection has been a consistent concern for trucks attempting to turn, often striking protective posts installed.

Mary Huber, General Manager, *Archbold Buckeye*, asked to be interviewed for this study. She has advertising accounts for many of Archbold's retail and foodservice businesses and is sympathetic to their concerns about the proposed bypass. She notes that Ohio's small towns grew up around railroads and State Routes. Their downtowns still need drive-thru traffic to stay alive. Franchises and dealerships are often required to be located on State Routes as part of their agreements.

She acknowledges that there may be economic development benefits to the town's industrial employers but believes that the burden of proof should be placed on those employers to show what those benefits are and how they offset the costs of relocating the State Route as well as potential loss of sales for current Defiance Street corridor retail businesses. She does not believe that the Village's Mayor and administration has done a good job of communicating with and listening to town merchants on the proposed truck bypass issue.

The next several sections of the study give voice to the opinions and concerns of Defiance Street corridor merchants in downtown, south of downtown, at Sauder Village, and other scattered spots near State Route 66 in Archbold about a number of issues, including the proposed bypass.

Another equally important objective is to gain enough of an understanding of business and market dynamics along Defiance Street/S.R. 66 to reasonably quantify the potential economic impact of the proposed bypass on local retailers and restaurants.

Thirdly, the study gauges public opinion regarding proposed bypass, including awareness of the issue, and frequency of shopping and dining in downtown Archbold, south of downtown in Archbold, and in Defiance.

Merchant Interview Sample

Boulevard Strategies conducted in-person interviews with 26 business owners/store managers representing 28 retail and foodservice businesses. In addition, three more merchants completed the survey online.* Another merchant, Terry Henricks who owns the Chrysler Dodge Ram Jeep dealership, left us a note expressing his opinions about the proposed truck bypass and those thoughts are included although we were not able to meet with him face-to-face while in Archbold. One of the businesses interviewed (Red Cross Drug) is in the process of going out of businesses so it was not counted in the totals for retail-related statistics. But the owner did express his opinions about the proposed truck bypass and other topics on the merchant survey and those have been included in this report where appropriate. Thus, the sample size is 29 or 31 businesses, depending on the question.

There is an estimated 80 retail and foodservice businesses in the Archbold Defiance Street/State Route 66 corridor based on U.S. Census zip code level data and field observations so close to 40% of all targeted businesses were surveyed.

All retail and foodservice businesses in the corridor, to the best of our knowledge, were visited, at least once or twice, or even three times to attempt a completed interview. Archbold merchants were generally friendly and welcoming. Several busy chain retailers, such as McDonald's, Circle K, and others need permission from headquarters to participate in surveys (a request rarely granted) and therefore are likely under-represented in the sample. In other cases, particularly with smaller independent merchants, the business owner was absent or was busy with customers during our visit and ended up not being interviewed. Merchants surveyed are listed on the next page in Exhibit 4.

Exhibit 4 - Merchant Survey Sample

Downtown Archbold Businesses Interviewed:	Archbold Businesses Outside of Downtown Interviewed:	Sauder Village Businesses Represented:
Archbold Barber Shop	Brookview Farm Market	The Barn Restaurant
The Corner Gallery	Case International Harvester	Doughbox Bakery
Eliza Henry	Fielitz Cabinets	Lauber's General Store
Field of Memories Antique Mall	Kenn-Field Group (John Deere)	Sauder Store & Outlet
The Home Restaurant	Lange's Bakery	Threads of Tradition Quilt Shop
Kinsman's Bridal	Laub Auto Parts	
Lauber Clothing	Lee Supply	
The Nurse's Edge	Lugbill Supply	
Pennycrest Shops	Mancino's Italian	
Red Cross Drug	Marathon	
Rapp Furniture & Carpet	The Savvy Dog	
Stella Blue's	Sunoco	
	Cari	Ten Thousand Villages

SOURCE: Boulevard Strategies

The survey sample includes a wide array of business types ranging from tractor dealerships and convenience/gas stores to downtown diners and specialty shops as well as Sauder Village operations.

The merchant interview guide can be found in the Appendix of this report.

Citizen Survey Sample

A total of 156 Archbold business patrons were intercepted inside and outside of about 15 retail and service businesses in Archbold on Friday, December 12, 2014. Assisted by BGSU Center for Regional Development staff and student interns, surveys were administered by Boulevard Strategies at various locations, including Andres Neil & Lowe Insurance Agency, Icky's Tavern, Stella Blue's, Carrie Ann's Café, Mom's Diner, Rupp Furniture, The Home Restaurant, The Corner Gallery, Eliza Henry Lauber Clothing, Savvy Dog, Sunoco, Lughill Supply, Dollar General, Supervalu, Rite Aid, and several other spots (on sidewalks, not necessarily at a particular business). About half of the surveys were administered in downtown and about half were taken south of downtown. The standard margin of error for most questions on the citizen survey results is 8%.

55% of those surveyed live in the Archbold zip code (43502). Next with 7% of the sample was Wauseon (43567), and then with 6% each were Fayette (43521) and Stryker (43557), and in fifth place, Defiance with 3%. The other 23% live all over, including a few folks passing thru to further destinations.

The median length of residency in current zip code is 27 years. This is true for both residents of the Archbold zip code and those who live outside of the 43502 zip code area. Length of residency in current zip code ranged from 4 months to 71 years.

57% of respondents report that they work full-time and another 17% are employed part-time. 26% are retirees, homemakers, students, or otherwise not currently working outside of the home.

Of those employed, the overwhelming majority work in Fulton County (79%). Another 10% work in Williams County, 6% work in Defiance County, 3% work in Henry County, and 2% work elsewhere.

A copy of the Citizen Survey instrument can be found in the Appendix to this report.

2. Business Size

2. Business Size

Employment

The typical merchant interviewed has a year-round average of 7.2 full-time employees, including owners who work in the business, and 5-4 part-time employees (9.9 FTE). This would imply that the Defiance Street corridor supports about 1025 jobs, of which about 575 are full-time positions. Retail/foodservice jobs pay \$18,500 a year, on average, in Fulton County, according to Ohio Development Services data. This implies that the Archbold/Defiance Street/State Route 66 retail corridor supports about \$19 million per year in wages, not including tips. This represents about 40% of Fulton County's retail and foodservice wages.

In addition, Sauder Village hires up to 350 seasonal employees each year, which is not included in the totals above.

Of course, averages can cover up the wide range in sizes of businesses interviewed, from a single owner up to as many as a staff of 25. Businesses in downtown have a median of just 2 full-time workers and 1 part-time employee. Foodservice businesses tend to have a lot more part-time employees than full-time workers, driving up the overall average per business.

Square Footage

Another way to measure the size of a retail business is to look at the size of its space, particularly selling space. Merchants surveyed average 9,000 square feet per business, 7,500 square feet (83%) of which is selling space, accessible to customers. Several businesses interviewed occupy spaces in excess of 10,000 square feet such as Rupp Furniture & Carpet, Lugbill Supply, Fielitz Cabinets, and Field of Memories Antique Mall. Vehicle dealerships and car lots are not included in these totals since much of their selling area is outdoors.

Based on this sample and other information about businesses not interviewed, the Defiance Street/State Route 66 corridor would appear to have about 720,000 square feet of non-automotive retail space, of which 600,000 square feet is selling space. This does not include vehicle dealerships.

3. Business Commitment

3. Business Commitment

Years in Business

The businesses surveyed are very well-established, for the most part. Over 80% have been in existence for at least 10 years, and 53 % have been around for 40 years or more. The typical business has been existence for an average of 51 years or since 1963. The median years in existence among those merchants interviewed is 38 years (open since 1976).

Merchants interviewed have been at their current location for an average of 38.5 years, or 75% of their existence. Median years at current location is 30 (or since 1984).

Downtown businesses have particularly long legacies, having been open for 61 years, on average (since the Eisenhower administration), 46 years at their current location. Those merchants south of downtown have been open for 38 years on average, 29.5 years at current location. Sauder Village opened in 1976, 38 years ago.

A majority of businesses surveyed have had more than one owner in their long histories (54%). The current owner or manager has been in that position for an average of 21 years (since 1993). This was virtually the same for businesses in downtown and those located south of downtown.

Own vs. Rent Property

66% of the businesses interviewed own their properties. This statistic was also virtually the same for businesses located in downtown and those merchants outside of downtown. High percentage of property ownership is another sign of rootedness among Defiance Street/State Route 66 corridor businesses in Archbold.

All but one business reported being "very satisfied" with their current location. They are not currently in the frame of mind to move or actively seek out a new location.

Financial Satisfaction

85% of business owners surveyed feel like they are making a decent living at their businesses. (Managers skipped this question). Half of business owners interviewed have other sources of household income (such as a working spouse); the other half is entirely dependent on their businesses to make a living.

4. Level of Activity

4. Level of Activity

Hours of Operation

All but the Sauder Village businesses, the antique mall downtown, and the convenience/gas stores are closed on Sundays. All surveyed are open on Saturdays although most close early, typically between noon and 2 p.m.

Businesses surveyed in downtown Archbold are typically open 44 hours a week, 7 of which are in the evenings and/or on weekends.

In contrast, businesses located south of downtown are typically open 61 hours per week, 19 of which are in the evenings and/or weekends. This includes two businesses (Marathon and Sunoco) that are open over 125 hours per week.

An estimate for each merchant's annual number of transactions was developed based on the merchant's estimated customer counts on busy and on slow days, days of operation, and alignment with average transaction size reported and reported annual sales.

The typical downtown business registers a median of 4,000 transactions per year while those located outside of downtown will record about 40,000 per year. On a per-hour basis, each downtown merchant averages 2 transactions per open hour while the typical business outside of downtown average 13 transactions per open hour.

These ratios can vary greatly with the convenience/gas stores and the restaurants driving much higher traffic volumes than other types of businesses. But it is clear that businesses outside of downtown (to the south along State Route 66 and at Sauder Village (during the April thru October tourist season) are generally much busier than downtown itself. An exception is downtown's seven restaurants, which are very busy during breakfast and lunch hours.

Number of Transactions

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5. Customer Mix

5. Customer Mix

Geographic Origin

Determining the geographic origin of Archbold Defiance Street/State Route 66 corridor customers is a primary objective of this study. Each merchant was asked to estimate what percentage of his or her customers came from the Village of Archbold itself, and then what

percentage come from north, east, south, and west of Archbold, all totaling 100%. These percentages were matched against estimated annual transactions for each business to create a weighted sample (by number of transactions per business).

Exhibit 5 - Geographic Origin of Archbold/State Route 66 Retail Patrons

Geographic Origin	Downtown Merchants	Merchants South of Downtown	Sauder Village/Merchants N+E of Downtown	All Businesses Surveyed
Village of Archbold	38.9%	38.0%	5.2%	29.6%
West of Archbold	20.4%	10.5%	28.7%	15.8%
East of Archbold	11.3%	11.2%	18.7%	13.2%
Subtotal, Low Impact Patronage	70.6%	59.7%	52.6%	58.6%
South of Archbold	15.5%	29.6%	18.5%	25.2%
North of Archbold	13.9%	10.7%	28.9%	16.2%
Subtotal, High Impact Patronage	29.4%	40.3%	47.4%	41.4%
TOTAL	100.0%	100.0%	100.0%	100.0%
% of Total Transactions	10.7%	63.2%	26.9%	100.0%

Based on Merchant Survey Responses; Weighted by Number of Transactions Per Year

SOURCES: Merchant Surveys and Boulevard Strategies

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As shown in Exhibit 5 on the previous page, Archbold businesses, whether in downtown, south of downtown, or north of downtown, draw the majority of their customers from outside of the Village – 70.4% for all businesses surveyed.

Tourist destinations such as Sauder Village and agriculture-related businesses north of downtown draw almost all of their business from outside of the Village, about 95%. A high percentage of their patrons drive in from the north (Michigan) and the west (Indiana) (57.6% combined).

Overall, downtown merchants are dependent upon Village residents and daytime workers for 38.9% of their revenues. Downtown restaurants serve more local residents than they do out-of-towners. Downtown's specialty retailers, on the other hand, must be able to draw from a much wider radius than just the Village to be successful.

An estimated 29.4 % of downtown's customers arrive from either south or north of the Village, presumably along Defiance Street/State Route 66. This is the segment of business that downtown Archbold merchants may be at risk of losing if the truck bypass is built.

High volume businesses located south of downtown rely heavily on support from Village residents and workers (38%) and those who live south of town, generally in Defiance County (29.6%). Merchants along this stretch believe that they are in heated competition for the segment of customers who live south of the Village with merchants in Defiance (19 miles south of Archbold). This is the segment that may be at risk for loss of customers for south end businesses in Archbold if a truck bypass is built.

Archbold businesses south of downtown also draw about 10.7% of their patrons from north of town, bringing the percentage of customers that would potentially be impacted to 40.3%, even higher than the 29.4 % of business in downtown that may be impacted by a

truck bypass. Many of these businesses would be forced to relocate if the bypass were built.

In theory, Sauder Village and other businesses north of downtown Archbold on State Route 66 would also be impacted by a potential bypass as nearly half of their patronage (47.4%) comes from north and south of Archbold. However, Sauder Village management and others to the north believe they are destination businesses that customers will seek out. In the case of Sauder Village, most of its patrons are parts of groups and/or have made reservations to stay overnight, having driven in from out-of-state (Michigan and Indiana) in many cases. Archbold residents account for only about 5% of these north-end businesses' revenues.

Demographics/Market Segments

Merchants report that 57% of their customers are females, collectively. Downtown merchants report a 66% female clientele versus 52% females outside of downtown.

The median age for customers for all businesses is 49. 28% of the overall customer base is over age 65, according to merchants. Only 19% of Fulton County's adult population is age 65 or older, according to the U.S. Census Bureau, so Archbold merchants are drawing a disproportionately high number of seniors. Sauder Village, on the other hand, draws a lot of youngsters and families.

In addition to serving individual consumers, about two-thirds of the businesses interviewed have business-to-business accounts. Collectively, these accounts comprise about 26% of the corridor's retail/foodservice revenues. This represents a segment of business less likely to be impacted by a potential bypass. In many cases, the merchant delivers products to the business customer's premises.

Another key market segment less likely to be impacted by a potential truck bypass is what is known as "regulars", defined as "frequent repeat, loyal customers". The typical Defiance Street/State Route 66 corridor merchant depends on "regulars" for 58% of their collective revenues, according to those interviewed. These are loyal customers that one would hope would not abandon Archbold businesses because of a bypass that could take them somewhere else (like Defiance) quicker than before.

6. Marketing Practices

6. Marketing Practices

Advertising Spending

In addition to storefront visibility and word-of-mouth, most retailers and restaurants rely on paid advertising to create customer awareness. Overall, Archbold merchants spend a median of \$7,500 per business per year on advertising. However, this varies widely among individual businesses. 23% of the businesses surveyed spend \$500 or less per year on advertising. At the other end of the spectrum, 16% of the businesses surveyed report advertising expenditures in excess of \$30,000 per year. Overall, the businesses surveyed typically devote just 1.1% of their estimated annual revenues to advertising costs. The retail industry standard is 2 to 3%, although this varies by size of company and line of trade. Only 13% of the businesses interviewed spend 2% or more of their sales on advertising.

Downtown Archbold retailers generally do not spend a lot on advertising. The typical downtown merchant will spend about \$1,500 per year, or 0.3% of sales. In contrast, large retailers, chain restaurants, and dealerships south of downtown, as well as Sauder Village to the north are major advertisers for a market the size of Archbold.

The vast majority of ad dollars are spent on radio and print. Direct mail, flyers, Internet ads, and trade show booths are also used to promote businesses. Most downtown businesses do little to advertise to tourists and visitors.

Internet/Social Media Presence

Mastery of e-commerce and social media are becoming increasingly important for 21st century retailers. 73% of the businesses interviewed have a Facebook page for the business. Another 17% have a Twitter account for the business. Pinterest, Google +, and houzz were also mentioned as social media that business owners and managers interviewed use for the business.

68% of the businesses interviewed have a website. However, only 29% of these websites are e-commerce functional (i.e., you can order and pay for merchandise over the Internet and have your purchase delivered). E-commerce plays a minuscule role in the business operations of the merchants that were interviewed, accounting for only 0.3% of all sales. Even for the 29% of businesses with e-commerce capabilities, e-commerce still accounts for only 1.1% of their total sales.

Merchants were also asked if they ever sold excess inventory over websites such as eBay, Amazon, Craig's List, and others. One in four merchants interview use this sales channel. These merchants ring up 2.3% of their total sales through this method. Overall, third party websites account for about 1.0% of all Defiance Street/State Route 66 corridor retail and foodservice sales, three times as much as the merchants sell on their own websites.

Thus, only about 1.3% of the corridor's retail sales are being consummated via e-commerce. State Route 66 merchants still rely heavily on traditional walk-in trade.

7. Competition

7. Competition

Chains vs. Independents

All of the businesses surveyed in downtown and 80% of the businesses surveyed outside of downtown are independently owned and operated. Each business was asked to its top 3 competitors. 55% of competitors named are independent merchants and 45% are chains or franchises.

The split was 69% independent businesses as competitors for downtown merchants while those outside of downtown are more in competition with chains and franchises (56%).

Competitor Locations

One-third (33%) of competitors mentioned by businesses surveyed were other businesses located in Archbold. 23% of all competitors mentioned are located in Defiance -- a key statistic. Wauseon accounts for another 15% of competitor locations. The other 30% of competitors mentioned are spread over locations such as Toledo, Bryan, Napoleon, Pettisville, and others.

Archbold Merchant Advantages

After naming their primary competitors, each business owner or store manager was asked why a customer would shop or dine at their business instead of their competitors; in other words, what are their competitive advantages? Their responses are grouped and listed below in order of most-to-least number of mentions:

- Superior Customer Service: dependable, experienced, fast, friendly, personable, well-trained, trusted, personalized, expert knowledge, free gift wrap (39% of mentions)
- Product Quality: best equipment/products/menu/fuels/parts/cars/breakfast/service department, made from scratch (17% of mentions)
- Competitive Prices: low prices/lower prices than competition (11% of mentions)
- Unique Items: can accommodate custom orders, source local hand-crafted products (8% of mentions)
- Large Selection: cover a niche category, carry variety of items for wide appeal (7% of mentions)
- Convenient Location: close to my customers (6% of mentions)
 - Store Experience: authentic, nice, upscale (4% of mentions)
 - Mission Affinity: religious/charitable affiliation (3% of mentions)

8. Sales Performance

8. Sales Performance

Current Estimates/Ratios

The typical business along the Defiance Street/State Route 66 commercial corridor takes in about \$2.25 million a year in revenues. However, this varies a great deal among individual businesses.

Exhibit 6 - Estimated Annual Revenue by Size

Per Business	Upper 1/3 (\$2M +/Year)	Middle 1/3 (\$500,000-\$2M/Year)	Lower 1/3 (<\$500,000/Year)	Overall
Annual Revenues	\$5,750,000	\$700,000	\$250,000	\$2,250,000
Selling Space*	13,500	6,500	2,150	7,500
Sales/Square Foot*	\$245	\$108	\$100	\$144
FTE Employees	18.6	8.4	2.7	9.9
Sales/FTE Employee	\$309,000	\$83,000	\$93,000	\$230,000
Annual Transactions	60,000	15,000	5,000	27,000
Avg. Transaction Size	\$96	\$44	\$50	\$83
Open Hours Per Work	68	56	42	55
Transactions Per Hour	18	5	12	10
Advertising \$/Year	\$70,000	\$5,000	\$2,000	\$25,000
% "Regulars"	60	52	45	58
% Business-to-Business	28	18	8	26
% Origin North/South of Archbold	40	33	29	39
# Downtown Merchants	0	3	9	12

*Does not include vehicle dealerships

SOURCES: Archbold Merchant Surveys and Boulevard Strategies

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The exhibit below divides the sample of businesses into thirds based on estimated annual revenues for each business.

The Archbold merchants interviewed average \$2.25 million per year. This average, however, is distorted by a few high volume businesses such as vehicle dealerships and convenience/gas stations. To avoid what would be a misleading result, the sample was divided into three groups based on sales volume – high, medium, and low.

Archbold's largest retail/restaurant businesses (upper third in revenues) average \$5.75 million a year each in revenues. Not including vehicle dealerships, they average \$245 in sales per square foot with 13,500 square feet of indoor selling space, on average. They employ 18 FTE employees per business. These employees produce \$319,000 a year each in sales volume, on average. (\$250,000 per FTE employee is a broad industry benchmark so these are highly productive businesses).

The upper-tier businesses are open long hours (68 a week, on average), turn a lot of transactions (17.6 per hour), and have a high average transaction size (\$94 overall, but this varies widely). A lot of their revenues are generated by committed customers – 60% repeat regulars and 28% business-to-business customers. These types of customers would provide a buffer against negative impacts of the proposed truck bypass. Still, 40% of those customers coming from the north or south could use it to skip by south Archbold businesses. Larger businesses also have greater resources available to finance a move if it proves necessary.

The middle group of merchants range from \$500,000 to \$2,000,000 in revenues per year, with \$700,000 being the center. This group of merchants underperforms versus larger and smaller businesses on most productivity measures. Sales per square foot is \$108 per square foot, sales per FTE employee is \$83,000, average transaction size is \$44, and transactions per hour average 5.4, all below average for the overall sample. However, most, if not all, of these businesses appear to be stable and profitable.

The lower third of the sample, in terms of annual revenues, averages \$250,000 per business per year. These businesses, primarily located downtown, appear to be the most vulnerable segment of Archbold merchants to the potential impacts of a truck bypass. They tend to be small in terms of both store and staff size, with a limited number of open hours per week. The smaller businesses have fewer reliable regulars (45%) and business-to-business customers (7%) than larger businesses.

On the other hand, they are less reliant on patronage from outside of Archbold than are larger businesses. Only 29% of their customers travel from the north or south of Archbold (versus 42% for larger businesses, primarily outside of downtown).

Trends

The 2015 survey report that revenues have improved 77% of the businesses surveyed report that revenues have improved versus 5 years ago. Of course, the United States was mired in the depths of the worst recession in decades 5 years ago in late 2009, and northwest Ohio was hit particularly hard, as previously mentioned. So it is not surprising that business has improved for local merchants; otherwise, they may not have survived.

7% of Archbold businesses have had flat sales and 16% have experienced sales declines since 2009. Overall, the State Route 66/Defiance Street commercial corridor is improving, business-wise.

9. Corridor Business Environment

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9. Corridor Business Environment

Strengths

Each business owner or manager was asked, in his or her opinion, to name the top three strengths of operating a business on State Route 66 or Defiance Street in Archbold. Their responses are grouped and presented in the order of most mentions to least mentions below:

- Business Mix: downtown "destination" restaurants, large stores and dealerships on south end of town, Sauder Village are traffic draws, wide variety, high number of local independents, longstanding businesses (38% of mentions)
- Town Appearance: clean, well-maintained, quaint, charming, historic preservation of buildings in downtown (22% of mentions)
- Location/Accessibility: on a State Route, high traffic volume, businesses easy to find, close to the turnpike (17% of mentions)
- Economic Vitality: few vacant storefronts compared to nearby towns, have enough jobs and industry to support retail businesses (12% of mentions)
- Tight-Knit Community: friendly businesses, loyal customers, support downtown events, try to buy local products (9% of mentions)

Challenges

Next, each owner or manager was asked what he/she thought are the top three challenges of operating a business on State Route 66 or Defiance Street in Archbold. Their responses, which in some cases mimic what the merchants listed as Archbold strengths, are grouped and presented in order of most mentions to least mentions below:

- Trains/Traffic Circulation: 137 trains a day, according to one merchant, split town in two, block traffic, roads blocked during construction, events, congestion during shift changes, only 2 connecting roads between S.R.66 and County Road 22 (41% of mentions)
- Business Mix: not much shopping in downtown, stores not geared toward younger generation, just service businesses like banks and insurance companies left, F&M Bank pulling out of downtown hurt (25% of mentions)
- Decline in Foot Traffic: especially downtown, down vs. 10 years ago, Archbold is small, not growing in population (15% of mentions)
- Parking: not enough, 3 hour limit (9% of mentions)
 - Limited Store Hours and Truck Traffic (4% of mentions each)

Note that only 2 merchants out of 31 surveyed specifically mentioned, unsolicited, truck traffic as being a significant issue for the Defiance Street/State Route 66 corridor.

10. Merchant Opinions Regarding Bypass Proposal

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10. Merchant Opinions Regarding Bypass Proposal

Perceived Impact on Own Business

75% of downtown merchants interviewed believe that a proposed truck bypass would hurt their businesses, with 58% feeling it would hurt their revenues "a lot". The other 25% did not believe it would have any impact on their businesses either way.

60% of owners/managers for businesses outside of downtown believe a truck bypass would hurt their revenues, with 47% saying it would hurt "a lot". 33% would not anticipate any impact either way and one business owner, located on County Road 24, believes his revenues would actually increase somewhat.

Sauder Village management does not believe that the bypass would have any impact on their operations since they are a tourist destination that draws a significant portion of its business from Michigan and Indiana and points beyond.

Overall, 55% of merchants believe that the proposed truck bypass would result in reduced revenues at their businesses, with 41% forecasting a severe negative impact.

42% do not believe a truck bypass would have any impact on their revenues. Many of these businesses are destinations such as the businesses operating at Sauder Village, the large dealerships, and certain finely-focused niche retailers.

Perceived Impact on Corridor In General

Only 19% of downtown merchants believe that a truck bypass would help the Archbold area, in general. Those downtown merchants who believe it would help the area mentioned certain parties as benefitting from a potential truck bypass, such as compensated property owners on County Road 24 or the ConAgra plant (but not downtown). Only one downtown merchant mentioned that re-routing truck traffic would help by easing congestion in downtown.

Those downtown merchants who believe it would hurt the Archbold area, in general, argue that lack of traffic and visibility will kill off businesses, one by one in a downward spiral. They point to precedents in Wauseon, Napoleon, and other places that have truck bypasses and struggling downtowns. Others do not believe truck traffic is an issue or that there are other ways to address it. Therefore, the proposed bypass would be unnecessary in their view, and too expensive to build.

For merchants who lie outside of downtown, 28% believe that the proposed truck bypass would be good for Archbold, in general but 57% think it will hurt the area. 15% are neutral.

Those outside of downtown who believe a truck bypass would help all cite the need to reduce truck traffic through downtown for safety reasons. It would also help their workforce with commute times, especially for those employees who live in Defiance County.

Those outside of downtown who think it would hurt the area believe a truck bypass would also divert passenger vehicle traffic upon which most Defiance Street merchants rely. It would make it easier for their customers to go to Defiance to shop or eat at competitors.

For/Against Proposed Bypass

Bottom line, twenty merchants interviewed (63%) are against the proposed truck bypass. This includes 10 of 12 downtown businesses surveyed (83%) and 8 of 12 businesses (67%) located south of downtown.

Eight (25%) voted in favor, but this includes all 5 Sauder Village businesses (as a bloc) plus three relatively large businesses outside of downtown. Two are undecided or neutral. The two downtown business owners who are not against the proposal are not for it, either; rather, they are indifferent.

As would be expected, all of those merchants who are against the proposed bypass stated that trucks are not a problem at all on State Route 66. 75% of downtown merchants hold this opinion about truck traffic as well as 62% of those located south of town.

About a fourth of the business owners/managers surveyed believe that trucks passing through downtown are an inconvenience for downtown businesses and their customers at times but do not cause a major problem. These persons are split on the proposed bypass, 5 against, and 3 for.

Only 3 owners/managers interviewed believe truck traffic to be a major problem on State Route 66, particularly in downtown.

General Comments

Those merchants against the proposed truck bypass were quite vocal in expressing their opinions as to why in the following sample of comments:

- "Why do we need another bypass? We already have enough infrastructure and tax abatement packages to compete for industry."
- "I think they can fix truck problems by re-doing Stryker intersection a lot cheaper than building a bypass."
- "Why can't the trucks just keep using the bypass we already built and paid for?"
- "I have not heard one good reason yet why this bypass is needed – who's asking for it?"
- "They're doing this because ConAgra keeps threatening to move out."
- "The Governor is pushing this on us from Columbus. Everybody else is just falling in line."
- "The Mayor has connections at the State. Now, our lives in are in the County Commissioners' hands."
- "It won't just be trucks that use the bypass, it'll be everybody."
- "It will kill Archbold just like it did every other little town around here" (several people mentioned Wauseon and Napoleon as examples)
- "There is not one example of anywhere in the State of Ohio where a bypass helped a downtown's businesses. Name me one."
- "A lot of people find us just by driving by"
- "We rely on casual 'browsers' and impulse walk-in trade."
- "Archbold is clean, people are friendly, and we have unique interesting places. We just need people coming thru town and they will stop."
- "People see my sign while they're driving by everyday even if they don't stop in that day."

- "A vibrant downtown communicates to others a vibrant community. It is important to community pride."
- "Trucks passing thru downtown are minimal compared to 10 years ago."
- "I don't think a bypass would do much to alleviate truck traffic because most of it nowadays is coming into Archbold, not passing through. There are easier ways to get to the turnpike, like State Route 24 or State Route 15."
- "Trucks will still go thru downtown if they feel like it even with a bypass."
- "Trains are the problem, not the trucks."
- "Our business (gas station) depends on truck traffic."
- "Competition to downtown will open on the bypass."
- "Dealerships and franchises will not be renewed if they are not on a State Route. Those businesses will relocate to the bypass or will just leave altogether."
- "If large retail draws on edge of town move, there won't be enough traffic for smaller shops and restaurants to feed off of...setting off a cycle of vacancy and no new investment in downtown"
- "Defiance will be the big winner. My customers will be able to get there 7 minutes faster."
- "Do they really want to destroy downtown for one company? They better think about it."
- "I have a multi-million dollar business that employs 26 people that will go down the tubes if you bypass this town."

A few merchants spoke in **favor** of the proposed bypass:

- "It would get rid of all these huge trucks passing through town from the south."
 - "The narrow streets in downtown weren't built to handle today's big trucks."
 - "It will help us all in the long run if we help our companies expand."
 - "Locals currently avoid downtown because of the trucks and the trains."
 - "This plan has been on ODOT's map since the 1970's because it makes for a smoother connection to the nearest turnpike exit."
- Other comments include the following:
- "I have a mixed opinion. I can see it from a safety standpoint but I also worry about reduced traffic for downtown businesses."
 - "We are a destination. Our customers don't just casually drop in. So a bypass wouldn't matter to us, one way or the other."
 - "Downtown and the Village businesses should go after more truckers instead of trying to get rid of them. They spend money too."
 - "We need a traffic light at intersection of Routes 2 and 66 to handle (Sauder Village) event traffic on nights when everybody tries to leave at once."
 - "Having your business on a busy highway is a good thing. Having your house on a busy highway is not a good thing." (from a State Route 66 merchant lives on County Road 24)
 - "They're going to do whatever they want to do. Nobody is really going to listen to us so it doesn't matter what I think."

11. Results of Citizen Surveys

11. Results of Citizen Surveys

Local Shopping/Dining Frequency

Citizen survey respondents were asked how often they shop and dine in downtown Archbold, south of downtown in Archbold, and Defiance. Their responses are displayed in Exhibit 7 below:

Exhibit 7 - Local Shopping and Dining Frequency by Location

	All Respondents		Zip Code 43502 Residents		All Other Zip Codes	
	Avg. Visits/ Month	% Frequent Patrons	Avg. Visits/ Month	% Frequent Patrons	Avg. Visits/ Month	% Frequent Patrons
Retailers						
Downtown Archbold	2.2X	63	2.6X	76	1.7X	47
South of Downtown	2.3X	66	2.8X	81	1.7X	48
Subtotal, Archbold	4.5X	65	5.4X	79	3.4X	48
Defiance	1.1X	22	1.1X	20	1.1X	24
Restaurants						
Downtown Archbold	2.4X	52	2.9X	63	1.8X	39
South of Archbold	2.3X	51	3.0X	66	1.4X	33
Subtotal, Archbold	4.7X	51	5.9X	65	3.2X	36
Defiance	1.3X	23	1.2X	20	1.5X	27

SOURCES: Archbold Citizen Surveys and Boulevard Strategies

Respondents shop in Archbold 4.5 times a month (2.2x downtown and 2.3x south of downtown). They shop in Defiance only slightly more than once a month (1.1x). 65% of respondents shop in Archbold frequently vs. only 22% who shop in Defiance on a frequent basis.

Respondents eat at Archbold restaurants 4.7 times per month (2.4x downtown and 2.3x south of downtown) but eat in Defiance only 1.3 times a month. 51% of respondents dine in Archbold restaurants on a frequent basis vs. only 23% who eat in Defiance on a frequent basis.

For Zip Code 43502 residents only, visits to Archbold retailers are 60% more frequent than those who live outside of the zip code. 81% of Archbold residents surveyed shop south of downtown in Archbold on a frequent basis (vs. 48% of non-residents). 76% also shop in downtown on a frequent basis (vs. 47% of non-residents). Frequency of shopping in Defiance does not vary much among respondents sorted by zip code.

Zip Code 43502 respondents eat at Archbold restaurants 85% more often, on average, than those respondents who live outside of Archbold. But they dine 20% less often in Defiance compared to those who live in other zip codes.

65% of respondents from Zip Code 43502 dine frequently in Archbold (vs. 36% of non-residents). Only 20% eat in Defiance on a frequent basis (vs. 27% of non-residents)

These statistics suggest that competition from Defiance for their patrons currently is meaningful for Archbold businesses along the State Route 66/Defiance Street corridor but not overwhelming. They also support the idea that Archbold's retail shops rely more on patrons from outside of Archbold than do its restaurants.

Awareness of Bypass Proposal

71% of those surveyed indicated that they were aware of the truck bypass proposal prior to the survey. 86% of Zip Code 43502 residents were previously aware of the issue versus 53% of those who live outside of Archbold.

Agreement or Disagreement With Opinion Statements

Respondents were asked to indicate their agreement or disagreement with five opinion statements related to potential impacts of the proposed truck bypass in Archbold. The results are shown in Exhibit 8 below:

Exhibit 8 - Agreement/Disagreement with Opinion Statements

Statement	% Agree	% Disagree	% Neutral
Downtown is attractive and inviting to those passing through.	89	3	8
Truck traffic causes safety hazard for downtown Archbold.	62	25	13
A truck bypass would cause downtown merchants to lose a great deal business.	53	25	22
This project is needed to support our local manufacturers.	49	26	25
I would personally find the proposed bypass to be convenient to use.	49	28	23

SOURCES: Archbold Citizen Surveys

Merchants, during interviews, stressed how clean and inviting downtown Archbold is to those passing through as a reason why drive-by traffic is important to their businesses. Citizens concur with 89% of respondents agreeing that downtown Archbold is inviting enough to persuade some folks to stop and get out of their vehicles to shop or dine.

58% of downtown merchants surveyed believe that the proposed bypass project if implemented would cost them a great deal of business. 62% of citizens surveyed agree with this assessment while 25% disagree.

One of the primary reasons cited for downtown Archbold needing a truck bypass is that the trucks have become a safety hazard. 62% of respondents agree while 25% disagree.

Another reason cited for building a truck bypass around Archbold is that it is needed to support local industry. About half of the citizenry (49%) surveyed agree with this idea while 26% are skeptical.

About half of those surveyed believe that they would personally find the proposed bypass convenient to use. 28% would not find it convenient to use and 23% are not sure if they would use it or not.

For/Against Proposed Bypass

41% of Archbold business patrons interviewed are in favor of the proposed truck bypass while 37% oppose it. A significant percentage (22%) of local citizens remains undecided. Setting aside undecided respondents for a moment, 64 respondents (53%) favor the bypass and 57 respondents (47%) are against it. However, the standard error margin for this question is 9% for 121 respondents, meaning that if all persons who visit Archbold retailers and restaurants, the true percentage of those in favor of

the proposed bypass may be as low as 44% or as high as 62%. Conversely, those opposed could be a majority at as much as 56% of all Defiance Street patrons or only 38% of the total. In short, the results of the citizen surveys are inconclusive as to whether the general public supports or opposes the proposed truck bypass.

Exhibit 9 below analyzes key differences between those in favor and those against the proposed bypass on other survey questions.

Exhibit 9 - Key Differences Between Those For/Against Proposed Bypass

% of Sample That:	For	Against
Shops/Dines Frequently in Downtown Archbold	53%	63%
Shops/Dines Frequently in Defiance	28%	17%
Agrees That Trucks Are a Downtown Safety Hazard	89%	28%
Agrees That This Project Needed for Local Manufacturers	81%	13%
Agrees That Downtown Merchants Would Lose Revenues	28%	79%
Agrees That Bypass Would be Convenient for Personal Use	83%	6%

SOURCES: Archbold Citizen Surveys

Overall, there are not very many significant differences between those who are for the bypass and those who are against it. For instance, 55% of those who favor the bypass live in the Archbold zip code. Likewise, 60% of those opposed to the bypass also live in the Archbold zip code. Both groups also include a majority of persons who work full-time in Fulton County.

The two groups do differ in shopping/dining patterns, however. Those who are in favor of the bypass are more likely to shop and eat in Defiance on a frequent basis (28%) than those opposed (17%). Those who are against the proposed bypass are more

likely to be downtown Archbold "regulars" (63%) than are those in favor (53%).

Those who support the proposed bypass were much more likely to agree that trucks are causing a safety hazard in downtown and that the bypass is needed to support local manufacturers than those who oppose the idea.

Equally unsurprising, those who are against the bypass proposal are much more likely to believe a truck bypass would significantly hurt downtown merchants' revenues than those who are for the bypass.

However, the item that best predicts whether a respondent is in support of or in opposition to the proposed bypass is whether or not the subject believes he/she would find the bypass personally convenient to use. For those in favor of the bypass, 83% agree that they would find a bypass personally convenient while only 6% of those opposed would find a bypass useful.

Comments

Citizen survey respondents were encouraged to write in comments on the blank back of the survey form to explain in more detail how they felt about the truck bypass proposal. A total of 15 persons, most of whom are opposed to the proposed bypass, wrote in comments. A sampling of their comments:

- "Trucks have been travelling through downtown for years. There wasn't an issue until you put the fancy bollards up at Stryker Street intersection."
- "I feel that this proposal is completely unnecessary. Why not change the intersection by Red Cross Drug and be happy? Save your money."
- "The town has made plans to fix this troubled intersection. Moving State Route 66 to County Road 24 is a waste of money."
- "I feel the need for this bypass is overstated. I question some of the reasons and the figures I have heard."
- "Trucking is not a problem in Archbold. There's no need for change but the Mayor never talks to the people who live here."
- "Why should we change State Route 66 for businesses that were purposely built on that road because of the traffic?"
- "I'd sure hate to see downtown stores eventually close because of a lack of people stopping in."
- "I think the bypass will wipe out the downtown retail forever. There will just be professionals and some restaurants left."
- "As soon as you bypass a small town, it dies! Take a look around at other small towns that have been bypassed."
- "No billboard is going to bring people into town. Those businesses depend on thru-traffic."
- "I feel like the new State Route 66 would have just as many accidents and injuries as we have now."

- "Farmers don't need the extra truck traffic on County Road 24. Safety for farmers and slow-moving vehicles is of more concern than trucks in downtown."
- "This bypass will affect the farmers that do business at the grain elevator on County Road 24."
- "This proposal, if passed, will put children leaving school on County Road 24 at risk. Who is responsible for people hurt or killed?"

Several comments were offered in support of the proposed bypass:

- "Unfortunately, Archbold has very few retailers left and all of them are really destination locations."
- "Do everything possible to call the new truck route just that and keep "Business Route" through Archbold."
- "I feel there should be a separate truck route to maintain auto traffic for local businesses."

12. Conclusions

12. Conclusions

- The proposed truck bypass is a controversial issue in and around Archbold.

Those speaking out in favor of the proposed bypass include the Village administration and local large manufacturing employers. Those opposed include those most directly impacted by the proposal: downtown businesses, dealerships and franchises south of downtown and farmers on County Road 24. Local public awareness and media interest is high and many folks are forming opinions on this hot topic.

- Downtown Archbold is relatively healthy.

It is clean, well-maintained, and inviting to those passing through. Downtown boasts historically significant architecture and hosts community events year-round. It has weathered a terrible recession with only a few vacant storefronts. Archbold's restaurants are a popular local and regional draw. Most of downtown's remaining retailers are focused on niche categories such as custom framing, nurses' uniforms and supplies, and children's clothing. 83% of downtown business owners feel like they are making a decent living from their businesses.

According to the citizens we surveyed, downtown remains a viable shopping and dining alternative to the south-end commercial strip in Archbold and to chains in Defiance for both shopping and dining. A bustling downtown is an increasingly rare community asset that should not be taken lightly. Sadly, not many towns in Ohio with Archbold's size and long history still have a downtown as vibrant as Archbold does.

- Sauder Village is a successful, well-managed tourism-based operation that runs independently of Archbold businesses and does not depend on pass-thru traffic.

Sauder Village management (and the Sauder family) have a good working relationship with Archbold Village administration and take a keen interest in the town's development. However, there is little overlap or synergy between those who visit Sauder Village and those who shop or dine downtown (The Barn Restaurant is a small exception since it draws some locals). Sauder Village is unconcerned about the impact of the proposed bypass on its own operations since its guests make planned trips to visit.

- State Route 66 south of downtown Archbold is a thriving, busy commercial corridor.

According to information gathered from businesses along this stretch, they are typically high volume operations with solid sales per square foot numbers and high employee productivity. Revenues are generally on the increase and high percentages of business-to-business clients (25-30% typically) and regular loyal customers (50-60%, typically) even out revenue swings. Fairly heavy advertising by dealerships, franchises, chains, and large independents bring in customers, as well.

- However, Archbold businesses could do more to promote themselves, including on the Internet.

This is particularly true of smaller downtown businesses, which spend 0.7% of sales on advertising, 70 to 80% below industry standards. There is little effort to actively promote downtown to Sauder Village guests and other visitors.

Web-based purchases now make up about 7% of all U.S. retail sales, according to the U.S. Census Bureau. Only about 1.3% of Archbold's retail business is consummated via e-commerce. Archbold businesses have a limited web presence, in general.

Store hours are a sensitive issue for independent retailers, who typically have small staffs. However, not many of Archbold's retailers are open in the evenings or weekends (except Saturday mornings). These are the times when most busy, working families have time to shop.

- Archbold businesses are rooted in their current locations.

Another clue as to the overall performance of Archbold's businesses is that almost no business owner had any thoughts or desire to move out of the business's current location - all but one is "very satisfied" with their current locations. (A typical study of this sort will find about 20-25% of business owners unhappy but stuck in their current locations or planning to move.) Most of these businesses have been in the same location for decades, half of them there since 1984 or before, whether downtown, south of downtown, or at Sauder Village. Two-thirds of the businesses interviewed own their properties, giving them another disincentive to move.

- About 38% of Archbold's retail/foodservice/lodging patrons, not counting Sauder Village, originate from north or from south of the Village (i.e. the traffic that may use the bypass if built).

In downtown, restaurants draw most of their diners from the Archbold zip code area while downtown retailers rely on a much broader radius for shoppers. Overall, about 29% of its traffic would be impacted by the proposed bypass, a lower percentage than those retailers south of downtown.

Businesses located south of downtown draw almost as many of their customers from south of Archbold (30%) as they do from the Village itself (38%). So the impact of the bypass would be generally be stronger on the businesses south of downtown with over 40% of its traffic potentially diverted by the proposed bypass than it would be for downtown merchants. The difference is that the businesses south of downtown are larger and have more resources available to them to be more resilient (or to move) in the face of adversity.

- The proposed bypass, if implemented, would place about 16% of the Archbold State Route 66/Defiance Street corridor's retail/foodservice/lodging revenues "at risk".

As shown in Exhibit 10 below, about 84% of the corridor's business comes from a combination of other businesses (B2B), 80% of each business's "regulars", other local workers and residents, and those who arrive from the east or west. These are considered each business's "safe" customers, those unlikely to

disrupt their relationship with the business for the sake of taking the bypass to somewhere else a few minutes faster.

This leaves those non-regular customers (and a not-so-loyal 20% of "regulars") who either originate from the north of town or from

Exhibit 10 - Retail Impact Model

Per Business	Upper 1/3 (\$2M+ /Yr.)	Middle 1/3 (\$500,000-\$2M/Yr.)	Lower 1/3 (<\$500,000/Yr.)	Overall Average
Annual Revenues	\$5,750,000	\$700,000	\$250,000	\$2,250,000
% Business-to-Business Revenues	x .28	x .18	x .08	x .25
Less B-to-B Revenues	-1,600,000	-\$125,000	-\$20,000	-\$575,000
Annual Consumer Revenues	\$4,150,000	\$575,000	\$230,000	\$1,675,000
% "Regulars" X .8	0.48	0.417	0.326	0.448
Less 80% of Regulars	-\$2,000,000	-\$240,000	-\$75,000	-\$750,000
Annual Revenues "In Play"	\$2,150,000	\$335,000	\$155,000	\$925,000
(% to Total)	37.4	47.9	62	41.1
% of Revenues Originating from South or North of Archbold	0.40	0.48	0.29	0.41
Annual Revenues of Risk Due to Bypass if Implemented	\$860,000	\$160,000	\$45,000	\$355,000
(% to Total)	15%	23%	18%	16%

SOURCES: Boulevard Strategies

the south of town. They are the customers most likely to be tempted to take the bypass and avoid Defiance Street (and the trains) in Archbold and therefore are considered "at-risk" in the Retail Impact Model presented below.

A large or medium-size business along the corridor could expect to find 15% of its patronage "at risk", while it could range as high as 23% for smaller and medium-size businesses, such as downtown merchants, according to the impact model presented above.

A caveat: Just because customers are labeled "at risk" does not mean the businesses will automatically lose those customers. But they will have to work harder to keep them. By the same token, some "regulars" will slip away if it becomes easier to bypass Archbold merchants. We have accounted for this in the model by estimating that a 20% slippage rate would occur even among regular customers.

- The State Route 66/Defiance Street corridor, as a whole, is at risk of losing up to \$30 million per year in retail and foodservice revenues, 115,000 square feet of occupied commercial space and 125 jobs if a bypass is implemented.

This is based on an estimate of 80 retail/foodservice businesses, \$180 million in annual revenues, 800 FTE employees, and 720,000 occupied square feet of space with about 16% of current revenues "at-risk" if a bypass was built. (Fulton County has total retail and foodservice sales in excess of \$500 million, according to U.S. Census data.)

One question to ask is where would these dollars be spent if they are not spent along the Defiance Street corridor? It appears likely that the dealerships, franchises, and chains would be pressed by central headquarters to move to the new State Route 66 if it happens. Other large independent operators may also

relocate. So a portion of whatever impact occurs would be a transfer, not a net loss for Archbold and Fulton County, which collects a 1.5% sales tax.

Smaller downtown establishments would not be likely to relocate and would be at risk of closing if they cannot find ways to offset the likely loss of pass-thru traffic. Note that the potential impact described above only addresses the initial effect on corridor businesses. As several merchants pointed out, a loss of one business often leads to the loss of another, in a downward spiraling pattern.

For a merchant with \$250,000 in annual revenues, an 18% loss (\$45,000 a year) in revenues would typically result in a loss of about \$9,000 in annual profits, enough to make a difference between staying open and closing for many independent operators. If a medium-size merchant with \$700,000 in annual sales lost \$160,000 (23%), it would lose about \$45,000 a year in profits. (These calculations are based on statistics collected and analyzed for dozens of small retailers and restaurants that have participated in Boulevard Strategies' Retail is Detail technical assistance and workforce development program.)

- Most of Archbold's merchants strongly oppose the proposed truck bypass.

Stated differently, few merchants are in favor of the bypass and none feel strongly in favor based on interviews with them. Sauder Village supports Village management also does not believe it will impact its own operations. It and 3 other merchants are in favor of the proposed bypass. One expressed mixed feelings but wanted to support the Village administration's efforts. What limited support the proposed bypass has among merchants is lukewarm.

On the other side, 63% of business owners and managers interviewed oppose the proposed bypass. They spoke out strongly against the proposed truck bypass in the interviews. This is not surprising given that over half of them believe that a bypass would cause a loss in business revenues, with 41% forecasting a significant loss. (They did not see the Retail Impact Model before answering this question but it supports their assessment). Unsurprisingly, not a single business owner/manager interviewed that believes his or her business will suffer if a bypass is built was in support of the proposal.

Two types of businesses interviewed are particularly against the bypass proposal: vehicle dealerships on State Route 66, to the south of downtown and downtown retailers and restaurants. No chain stores were interviewed but it is likely that they would also have concerns about their current locations if State Route 66 were to be bypassed.

- **The public is split or undecided on whether or not it supports a truck bypass in Archbold.**

Among those surveyed who have formed an opinion about whether they are in favor or against the proposed truck bypass, those in favor outpolled those opposed 53% to 47%, which is statistically inconclusive given the closeness of the results and the size of the sample (standard error margin = 9%). Another 23% of general public polled is undecided or neutral or does not care about the proposed bypass. Like the merchants interviewed, citizen survey respondents who are against the proposed bypass are way more vocal about their opinions than are supporters of the bypass.

But at the end of the day, the factor that drove whether or not someone in the general public is for or against the proposed bypass is whether or not they would find it personally convenient to use.

- **Those in favor of the proposed truck bypass believe that trucks have become a safety hazard in downtown and also want to support economic development in Archbold for the good of everyone.**

Manufacturing is the lifeblood of the Archbold economy. When local factories are doing well, workers have more money to spend at local shops and restaurants. But those factories need efficient means of distribution, including delivery trucks, to be competitive. Every minute of travel time costs money for these operations. Trucks and the bollards at Stryker Street are frequently damaged, which is not surprising, given the number of trucks that attempt the tight turn each day and night, which also costs money.

Supporters of the truck bypass downplay the impact that the bypass will have on existing businesses along the State Route 66 corridor, including downtown merchants. Some believe downtown retailers are dying off anyway and that it is more important to keep local manufacturers with high-paying jobs happy.

They point out that there has been a plan to relocate State Route 66 for many years to more directly align with Exit 26 of the Ohio Turnpike but funding was not available to even study this proposal until recently. It is not a new idea.

- Those who oppose the proposed truck bypass believe that it is unnecessary and that it will do significant harm to existing businesses along the corridor, forcing them to relocate or to close.

These folks are pleased with things the way they are. As mentioned above, the corridor, including downtown, is relatively healthy and the economy continues to improve. They have grown comfortable in their longtime locations and have no interest at all in moving.

A key determinant in whether one is for or against the proposed bypass is one's perception of whether trucks are causing a true safety hazard in downtown Archbold. Only 28% of those citizens who oppose the proposed bypass believe that truck traffic is a problem vs. 89% who support the proposed bypass. Of those 28% who believe that truck traffic is a hazard, but still oppose the bypass, many think that the problem can be solved in other ways. It was suggested by several persons that the Red Cross Drug store property be bought and torn down and the intersection widened at Stryker Street to make it easier for trucks to make the turn. They believe that this would be a less costly, less disruptive solution. They also point out that Archbold already has one bypass and does not need a redundant second route for trucks passing through to avoid downtown trains and traffic lights.

More to the point, merchants and citizens alike who oppose the proposed bypass it is not only unnecessary but that it even would be harmful to retail and foodservice businesses along Defiance Street that rely on traffic from outside of the Village. They are especially concerned about downtown merchants

losing business and what might happen to the Village's cherished downtown. They have witnessed retail and property declines in other towns with bypasses. Merchants fear that they will be forced to make a costly move or close down if a bypass is built. They want the local economy to add jobs but not at the expense of the livelihoods of their employees and themselves.

Although the focus of this report is on Defiance Street and the current State Route 66, some folks interviewed and surveyed oppose the bypass proposal because of the negative impact they believe that the project would have on County Road 24's school, grain elevator, farms and residences impacted by its widening and increased traffic. They too are satisfied with the current situation.

Boulevard Strategies thanks those merchants and citizens who were surveyed for their time and input as well as the Bowling Green State University Center for Regional Development for sponsoring and assisting with this research study.

Questions or comments regarding this report can be e-mailed to Chris Boring, the primary author of this report (chris@blvd-strategies.com).

13. Appendix



Downtown Archbold/Sauder Village

Business Interview Guide

Date _____ Business _____ Location _____

Name _____ Title _____ E-mail _____

Your responses will be used for tabulation purposes only. Individual survey responses will be kept confidential to only Boulevard Strategies.

BACKGROUND

- 1) A. What type of business is your business (i.e., what do you sell and/or do at your business)?

- B. What are your **top 5** products/services/menu items?

1. _____
2. _____
3. _____
4. _____
5. _____

Of these top 5 categories, what is the **percent to total sales**? _____ %

- 2) A. How long has your business been at its **current location**? _____ Years _____ Months

- B. How long has your business been in **existence**? _____ Years _____ Months

- C. Have you (or the current owner) **always owned this business**? Yes No

If no, **how long** have you owned the business? _____ Years _____ Months

- 3). A. Do you **rent or own** your property? Own Rent

- B. About how many **square feet of space** does your business occupy? _____ Sq. Ft.
- C. How much of that **space is not accessible to customers** (office/storage/kitchen/etc.)? _____ Sq. Ft.
- 4) How **satisfied** are you with the present location of this business (mark one)?

Very Satisfied Neutral Very Unsatisfied Satisfied Unsatisfied
 Plan to Move/Sell

If Unsatisfied or Plan to Move/Sell, why?

- 5) A. How many **fulltime employees**, counting yourself, do you have? _____
- B. How many **part-time employees** do you have? _____
- C. Is this **more, the same, or less** than a year ago?

Fulltime	<input type="checkbox"/> More	<input type="checkbox"/> Same	<input type="checkbox"/> Less
Part-time	<input type="checkbox"/> More	<input type="checkbox"/> Same	<input type="checkbox"/> Less

- 6) What are the **hours of operation** for this business?
- Rank busiest to slowest**
- | | | |
|--------------|---------------------|-------|
| A. Sunday | from _____ to _____ | _____ |
| B. Monday | from _____ to _____ | _____ |
| C. Tuesday | from _____ to _____ | _____ |
| D. Wednesday | from _____ to _____ | _____ |
| E. Thursday | from _____ to _____ | _____ |
| F. Friday | from _____ to _____ | _____ |
| G. Saturday | from _____ to _____ | _____ |

- 7) A. How many **transactions** do you typically register on your **busiest day of the week**? _____
- B. And, how many do you typically register on your **slowest day of the week**? _____

CUSTOMER MIX/MARKETING

8) About what percentage of your business would you estimate comes from each of the following **customer groups**?

- A. Those Who **Live or Work in Village of Archbold** _____ %
 - B. Those Who **Live North of Archbold** (Turnpike, Michigan) _____ %
 - C. Those Who **Live East of Archbold** (Wauseon, Napoleon) _____ %
 - D. Those Who **Live South of Archbold** (Defiance, Defiance County) _____ %
 - E. Those Who **Live West of Archbold** (Bryan, Indiana) _____ %
- = **100%**

9) What percentage of your business **originates from Zip Code 43502**? _____ %

10) And, how do your **customers** fall into these groups?

- A. **Gender** / Females vs. Males _____ %

- B. **Age Groups**
- | | |
|-------------|---------|
| 0-17 years | _____ % |
| 18-24 years | _____ % |
| 25-44 years | _____ % |
| 45-64 years | _____ % |
| 65+ years | _____ % |

- C. **Business to Business** Customers _____ % of total

11) What percent of your customers would you consider to be "regulars" (frequent repeat, loyal customers)?

_____ %

12) What **three businesses** in **Downtown Archbold** do you believe your customers **most often visit** besides your business?

1. _____

2. _____

3. _____

13) What is the **average transaction** dollar (\$) size (or range) for your business? \$ _____

14) A. About how much do you **spend on advertising per year** at your store? What is the medium that you spend the most advertising dollars on?

\$ _____ Per Year Medium With Highest Spend \$ _____

B. What **social media** does your business have a presence on?

Facebook Pinterest Twitter Yelp TripAdvisor Groupon Foursquare

Others _____

15) A. Does your store have a **website**? Yes No

B. If yes, can customers **purchase merchandise** from your store over the Internet? Yes No

C. If yes, can purchases be **made directly from your website**? Yes No

What percent of your **total sales** are made **over the Internet**? _____ %

D. Do you sell merchandise from your store on **e-bay, Amazon, Facebook, Pinterest** or any other Web-based medium? Yes No

If yes, which ones? Facebook Pinterest Groupon eBay Amazon

Others _____

If yes, what percent of your **business's revenues** come from these sources? _____ %

COMPETITION

16) What would you consider to be your top three competitors?

Name of Business	Street/Shopping Center	City/Town(Miles Away)
------------------	------------------------	-----------------------

1. _____

2. _____

3. _____

17) Are there any **websites** that you think of as being **competition** to your business? Please list up to 3.

1. _____

2. _____

3. _____

18) A. Why would a customer choose **your business** over those of your competitors?

B. What are some of **your competitive advantages**?

DOWNTOWN BUSINESS ENVIRONMENT

19) **Top 3 strengths/positives** of the **current** business environment in Downtown Archbold or Sauder Village are:

1. _____

2. _____

3. _____

20) **Top 3 weaknesses/challenges** in the **current** business environment in Downtown Archbold or Sauder Village are:

1. _____

2. _____

3. _____

21) *As you have likely heard by now, ODOT, with input from Fulton County and Village of Archbold officials, is considering an update of a 9-mile section of County Road 24 between U.S. Route 20A and State Route 6 as a new portion of State Route 66. This would create a truck bypass around downtown Archbold/Sauder Village.*

Do you think a truck bypass around Archbold would **help or hurt your business's revenues**?

- Help us a lot Somewhat help us Neither help nor hurt us Somewhat hurt us
 Hurt us a lot Don't Know

22) Why do you think it will **help/hurt your business's revenues**?

23) Do you think it would **help the Archbold area**, in general? Why or why not?

24) How much of a problem do you believe **trucks passing through downtown Archbold** is for downtown businesses and their customers?

A major problem An inconvenience at times but not a major problem Not a problem

25) Bottom line, are you in **favor of** the truck bypass or **against** it?

For Against

WRAP-UP QUESTIONS

26) Which of the following categories best describes your **sales in a typical month** (i.e., on an annualized basis)?

- | | | |
|--|--|--|
| <input type="checkbox"/> Under \$2,500 | <input type="checkbox"/> \$2,500-\$5,000 | <input type="checkbox"/> \$5,000-\$7,500 |
| <input type="checkbox"/> \$7,500-\$10,000 | <input type="checkbox"/> \$10,000- \$15,000 | <input type="checkbox"/> \$15,000-\$20,000 |
| <input type="checkbox"/> \$20,000-\$30,000 | <input type="checkbox"/> \$30,000-\$50,000 | <input type="checkbox"/> \$50,000-\$75,000 |
| <input type="checkbox"/> \$75,000-\$100,000 | <input type="checkbox"/> \$100,000-\$200,000 | <input type="checkbox"/> \$200,000-\$400,000 |
| <input type="checkbox"/> \$400,000-\$800,000 | <input type="checkbox"/> \$800,000 or more | |

27) A. Would you say your business is doing better, about the same, or worse than it was five years ago (2009) (if in business for at least five years)?

A lot better Somewhat better About the same Somewhat worse A lot worse

B. If better or worse, why?

28) A. Do you feel like your business is doing well enough for you to **make a decent living?** Yes No

B. Is this business the sole source of income for your household? Yes No

29) Is there anything else you would like to add?

Ask to photograph exterior of store from curb/parking lane.

THANK YOU!

Archbold Citizen Survey

1. How often do you visit the following?

Weekly Monthly Yearly Rarely/Never

<u>Retailers in downtown Archbold</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants in downtown Archbold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Retailers south of downtown in Archbold</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants south of downtown in Archbold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Retailers in Defiance</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants in Defiance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. ODOT, with input from local officials, is considering an upgrade of a 9-mile section of County Road 24 between U.S. Route 20A and State Route 6. This would create a new State Route 66 through Archbold that would act as a truck bypass around Defiance Street, including downtown. Were you already aware of this proposal?

Yes No Not Sure

3. Please indicate your level of agreement or disagreement with the following statements:

	Agree	Somewhat Agree	Neutral	Somewhat Disagree	Disagree
Truck traffic causes a safety hazard for downtown Archbold.	<input type="checkbox"/>				
A truck bypass would cause downtown merchants to lose a great deal of business	<input type="checkbox"/>				
Downtown is attractive and inviting to those passing through	<input type="checkbox"/>				
I would personally find the proposed bypass to be convenient to use	<input type="checkbox"/>				
This project is needed to support our local manufacturers	<input type="checkbox"/>				

4. Bottom line, are you in favor of or against the proposed truck bypass?

For Against Undecided

5. What is your residential zip code? _____

6. How many years have you lived in this zip code? _____ Years

7. Are you employed? Full-time Part-time Not Employed/Retired

8. If employed, where do you work?

Fulton County Defiance County Henry County Williams County Somewhere Else

Please feel free to use the back of this survey to write additional comments.

THANK YOU!

Boulevard Strategies provides economic and retail research and analysis, economic development planning, strategic planning, market plan development and program development services to government, non-profit and private sector clients.

Our services support the development of:

- Economic Development Plans
- Economic Impact Analysis
- Real Estate Strategy and Analysis
- Trend Tracking
- Industry Cluster and Baseline Studies
- Business and Marketing Plans
- Competitive Assessments
- Benchmarking
- Business and Retail Audit Reporting

Our clients include:

- Commercial Property Developers
- Commercial Property Investors
- Municipalities
- Government Agencies
- Downtown Business Associations
- Community Development Organizations
- Development Corporations
- Special Improvement Districts
- Retailers
- Manufacturers
- Service Organizations
- Non-Profits

To learn more about Boulevard Strategies go to www.blvd-strategies.com. And, follow us on Facebook, where we post and comment on articles about the latest retailing, real estate, land use planning, and marketing trends several times a week, all year long.

About Boulevard Strategies

Section Three

ODOT Traffic County Survey Reports

Traffic Counts

The Ohio Department of Transportation provides estimated traffic count data for all the state routes in form of traffic survey reports. The reports are compiled every three years and list an estimate of Annual Average Daily Traffic (AADT) volumes broken down into cars and trucks. The reports are generated using a combination of both short-term and permanent counts collected during the given calendar year. Below is a table showing the historic results from the traffic survey reports for the SR 66 Corridor.

Table 1: Fulton County Average Daily Traffic (2005, 2008, 2011, 2014)

Year	Traffic Section	Section Length (miles)	Passenger	Trucks	Total Vehicles
2005	Stryker St from SR 66 to Co Rd 24	1.01	3480	250	3730
2005	SR 66 from DT to SR 2 East	0.49	7330	920	8250
2005	SR 66 from Hen Co Line to Miller Ave	1	6480	830	7310
2005	SR 66 from Miller Ave to Stryker St	1.14	9260	850	10110
2008	Stryker St from SR 66 to Co Rd 24	1.01	3870	250	4120
2008	SR 66 from DT to SR 2 East	0.49	6850	620	7470
2008	SR 66 from Hen Co Line to Miller Ave	1	6900	880	7780
2008	SR 66 from Miller Ave to Stryker St	1.47	10200	940	11140
2011	Stryker St from SR 66 to Co Rd 24	1	3400	240	3640
2011	SR 66 from DT to SR 2 East	1.5	6310	490	6800
2011	SR 66 from Hen Co Line to Miller Ave	1	6060	690	6750
2011	SR 66 from Miller Ave to Stryker St	1.47	8790	1010	9800
2014	Stryker St from SR 66 to Co Rd 24	1	2980	140	3120
2014	SR 66 from DT to SR 2 East	1.5	6030	330	6360
2014	SR 66 from Hen Co Line to Miller Ave	1	4820	380	5200
2014	SR 66 from Miller Ave to Stryker St	1.47	7590	600	8190

The Village of Archbold, although still a large importer of human capital, has lost some jobs over the past five years. When looking at income tax revenue, there was a declining trend from 2007-2010 and then some leveling out of revenues. Those reductions in tax revenue translate into fewer jobs in the village which explains the overall downward trend in the traffic counts.

Figure 1 Combined Passenger and Truck Counts

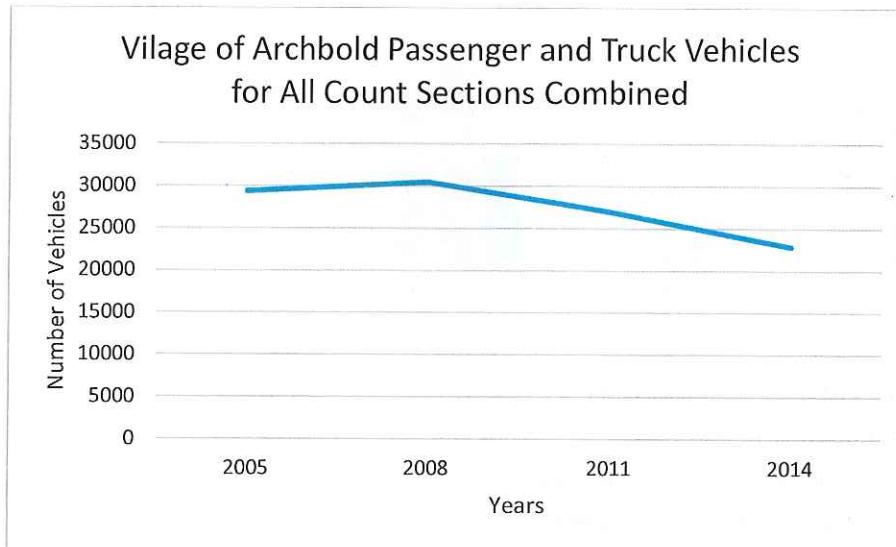


Figure 1 shows the total of both passenger vehicle and truck counts provided by the Ohio Department of Transportation from 2005 to 2014. There was an overall decline in traffic on SR 66 during this period. Figure 2 depicts the estimates of truck traffic over the same nine year period. There has been a marked decline in truck traffic from nearly 3000 trucks per day to just under 1500.

Figure 2

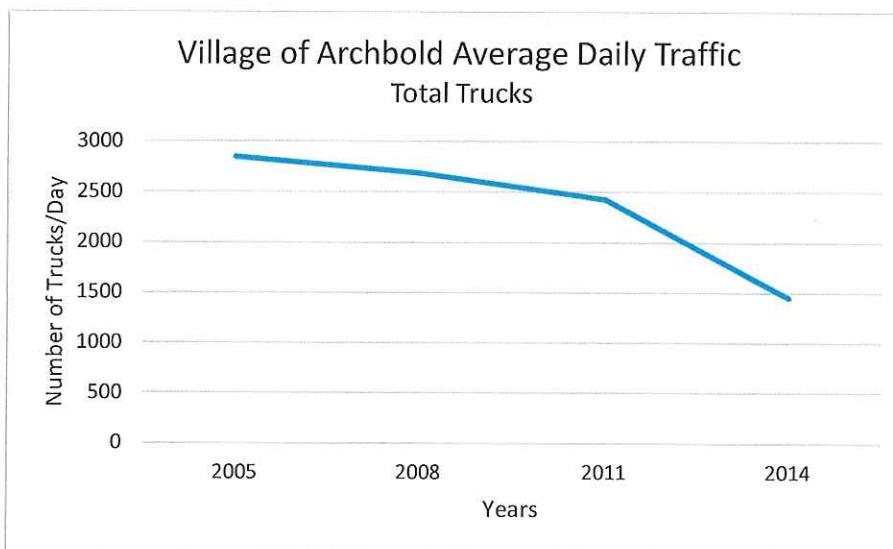
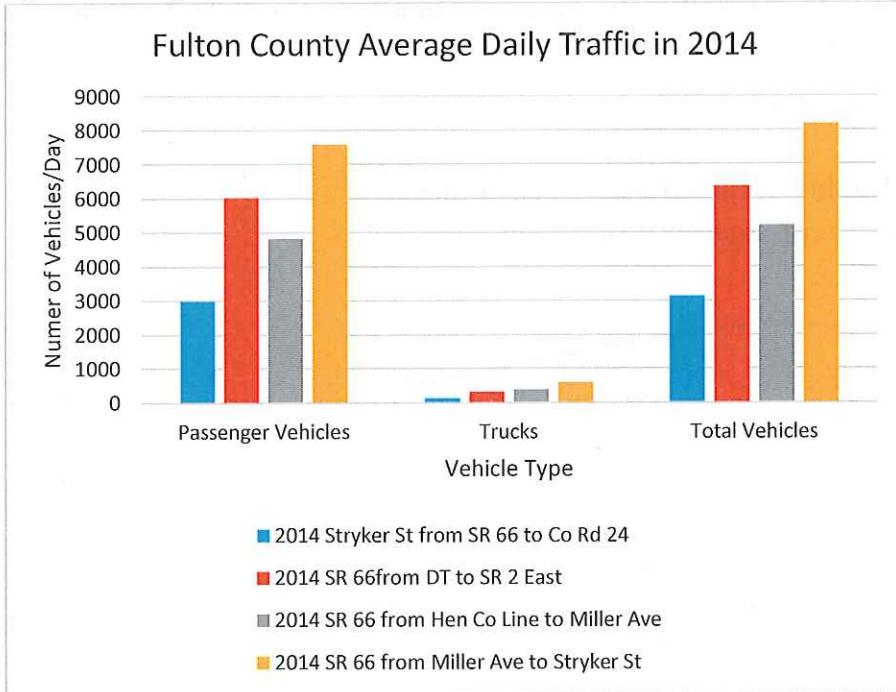


Figure 3 Average Traffic by Section 2014



The Ohio Department of Transportation provides the estimates on traffic counts every three years by identified sections of state roadways. Figure 3 is a graph of the 2014 counts by the four different sections that make up the SR 66 corridor. Although traffic numbers have declined over the past several reporting periods, there is still over 8,000 vehicles per day passing through downtown Archbold.

Section Four

Key Stakeholder Interviews & Analysis

Key Industries and Stakeholders

As part of this study to determine the economic impact of creating an alternate truck route on the current County Road 24 corridor, the CRD team interviewed key industry and stakeholders.

The six industries and three key stakeholders and two local real estate companies that were interviewed for this project are listed below:

Industry	Stakeholders	Real Estate
Conagra	Farmers and Merchants Bank	Butler Real Estate-Gary Butler
Bil-Jax/Haulotte Group	Village of Archbold Fire and Rescue	Wilson Auction and Realty Co.
Miller Brothers Construction	NWO Educational Service Center	
Arrow Tru-Line		
Brookview Farms		
Archbold Furniture		

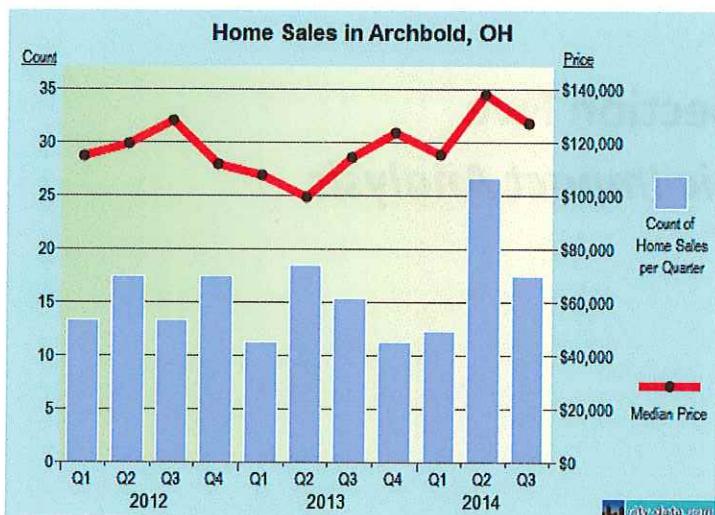
The information gleaned from these interviews is that there will be a significant benefit to the industries, especially those located between existing SR 66 and the Co. Rd. 24 corridor. These companies are currently experiencing trouble with trucking companies not wanting to deliver or pick up at their facilities because of delays caused by both the congestion on SR 66 corridor and train traffic. In some cases, just sourcing trucking companies is becoming increasingly difficult. Several companies mentioned additional dockage fees are being charged by trucking companies due to delays associated with the SR 66 route. These additional fees result in transport costs are higher for their facilities here than at either their competitors sites or even other locations within their same company. Industries on the east side of SR 66 have the County Road 22 option, however, they stated that trucks still take SR 66 during the winter months because of travel difficulties on County Road 22 caused by blowing and drifting snow. The small industries without a large amount of truck traffic will still see benefits from the ease of ingress and egress through the village for their employees. Several interviews mentioned that employees are reluctant to eat lunch in the downtown area because of the congestion and the inability to get back to their jobs in a timely manner.

There is great potential of growth with an improved transportation route for truck traffic. Conagra has existing capacity at their facility and is home to one of their company's regional distribution centers. Growth at the distribution center has been hampered by the issues surrounding truck congestion and trucking sourcing problems. The Bil-Jax facility has plans for an expansion if the transportation issues can be resolved. They have additional property available for development and have shown a very favorable growth trend in terms of employment and sales. The trucking issues have become a critical issue for them and the operation of their business. They have had to pay overtime for workers to come in on the weekends to load and unload trucks that refuse to attempt deliveries during the week.

Real Estate Impact

The research team interviewed two regional real estate companies to obtain some expert opinions on the SR 66 relocation projects effect on housing and property values. We also reviewed historic information on home sales in Archbold. The real estate individuals both felt the relocation would have a minor positive impact on residential values on the current SR 66 corridor and a minor negative impact on the values of property along the proposed route. Housing sales have remained relatively flat since 2012. The median value of a housing unit in Archbold is estimated at \$121,376. Figure 1 shows the trend of housing sales by quarter for the past three years. Median housing values have remained fairly constant over this period.

Figure 1



One realtor felt that the downtown businesses would be greatly effected and the value of downtown property would decline, and the other felt it would have little effect on property values in either the downtown district or the new corridor. The overall conclusion from the literature review is that struggling downtowns will be more greatly effected than those that have a strong base prior to any relocation project.

Section Five

Economic Impact Analysis

IMPACT ANALYSIS

This study employed an Input/Output model to make the primary economic forecasts. Input/Output methodology allows the examination of forward and backward linkages that are present in any regional economy. The model measures the total annual economic activity that results from inter- and intra-industry transactions. The model breaks the economy into approximately 523 separate sectors with each sector representing an individual industry. It then uses a sectoring scheme developed by the IMPLAN Group and is closely related to the Bureau of Economic Analysis (BEA) REIS model. The model is an approximate 523 by 523 (row x column) matrix that shows all the economic activity between the individual sectors. The entries in the matrix are based on the dollar amount that each industry sells to (and purchases from) other industries in the Ohio economy. It measures the amount of final consumption by the residents of the region, as well as how much each industry exports from the area. The model uses data collected at the county level, which are obtained from the IMPLAN Group and the BEA. County data is in turn aggregated or “rolled-up” to form service areas such as local areas, states or larger geographic regions such as the Midwest.

Input/Output models estimate economic impacts by taking advantage of the relatively stable patterns in the flow of goods and services within the economy. Predictions can be made of an industry's total economic impact by examining the purchasing patterns of the individual sectors. The BEA collects extensive data on these regional trade flows and reports their findings annually.

The numbers used to generate the inputs for the IMPLAN model are outlined in the table on the following page. The team utilized the output and employment numbers for the county as whole and multiplied them by a 40%, which is the estimated Archbold share of total county retail sales that was generated through merchant interviews completed by Boulevard Strategies and outlined in more detail in Section 2. The merchant interviews were also used to estimate a worst case scenario of potential negative impacts as a result of the relocation project. The estimated 16% decline was also used to calculate the reduced retail dollars by sector in the IMPLAN model. The model then calculates the direct, business to business spending and impact of employee spending. It also calculates the potential increase or decrease in number of jobs as a result of the economic activity.

Description	County Employment	County Output x 40%	Employment x 40%	Output x 40%	Output @ 16% loss	Employment @ 16% loss converted to FTE
Retail - Motor vehicle and parts dealers	187.8	\$21,418,924	75.12	\$8,567,570	(\$1,370,811)	(14)
Retail - Furniture and home furnishings stores	48.1	\$3,925,194	19.24	\$1,570,078	(\$251,212)	(2)
Retail - Electronics and appliance stores	18.3	\$1,184,541	7.32	\$473,816	(\$75,811)	(.3)
Retail - Building material and garden equipment and supplies stores	219.7	\$21,441,353	87.88	\$8,576,541	(\$1,372,247)	(13)
Retail - Food and beverage stores	391.1	\$22,918,280	156.44	\$9,167,312	(\$1,466,770)	(8)
Retail - Health and personal care stores	110.7	\$7,603,766	44.28	\$3,041,506	(\$486,641)	(.3)
Retail - Gasoline stores	188.8	\$10,677,802	75.52	\$4,271,121	(\$683,379)	(2)
Retail - General merchandise stores	327.3	\$22,671,621	130.92	\$9,068,648	(\$1,450,984)	(6)
	1492	\$111,841,481	597	\$44,736,592	(\$7,157,855)	(45.6)

Table 1 below displays the forecasted direct impact of the project on the retail sector. These numbers are based on the sales tax revenues of the county, prorated at 40% of the total. The 40% figure is in accordance with the calculations made by Boulevard Strategies of the research team. It is possible that not all the sectors represented in the table will be part of the corridor businesses, so the potential losses should be considered a worst-case scenario.

Table 1: Projected Impact on Retail Sector

Sector	Direct Impact
Retail - Food and beverage	-1,499,089.35
Retail - General merchandise stores	-1,443,582.85
Retail - Motor vehicle and parts dealers	-1,381,131.35
Retail - Building material and garden equipment and supplies stores	-1,287,798.23
Retail - Gasoline stores	-923,371.17
Retail - Miscellaneous store retailers	-518,112.02
Retail - Health and personal care stores	-508,855.18
Retail - Furniture and home furnishings stores	-262,899.65
Retail - Clothing and clothing accessories stores	-234,472.84
Retail - Sporting goods, hobby, musical instrument and book stores	-155,163.56
Retail - Electronics and appliance stores	-56,337.84

Boulevard Strategies utilized the results from the merchant's survey to calculate an approximate market share attributed to Archbold retailers from all retail sales in Fulton County. These numbers are very conservative, in that they are based on the actual results of the survey, and then extrapolated to the entire retail sector along and around the SR 66 corridor without compensating for size and type of retailer. An attempt was made to adjust the revenues based on size, but the large retail merchants still cause an overrepresentation in the final figures.

Table 2: Impact of 60 New Manufacturing Jobs

	Direct	Business to Business	Employee Spending	Total
Jobs	60.0	31.5	25.1	116.6
Labor Income	\$4,577,384.91	\$1,281,349.90	\$814,844.08	\$6,673,578.89
Value Added Output	\$7,042,615.17	\$2,193,327.11	\$1,660,227.48	\$10,896,169.76
	\$29,384,490.87	\$4,653,981.40	\$2,871,922.02	\$36,910,394.29

Table 2 shows the result of an increase of sixty jobs in manufacturing and projects the overall impact on the economy. The sixty jobs is an estimate based on plans at some of the manufacturing firms located on the west side of SR 66 that will benefit from the relocation project. It gives the direct, business to business impact and the resulting impact from employee spending. Much of the employee spending and a portion of the business to business would be expected to positively impact the retail sector in Archbold.

Table 3: Overall Net Impact of SR 66 Relocation

	<i>Direct</i>	<i>Business to Business</i>	<i>Employee Spending</i>	<i>Total</i>
<i>Jobs</i>	14.4	26.3	17.5	58.2
<i>Labor Income</i>	\$2,988,030.17	\$1,114,171.64	\$568,940.99	\$4,671,142.80
<i>Value Added</i>	\$4,548,546.24	\$1,817,797.39	\$1,159,193.00	\$7,525,536.63
<i>Output</i>	\$25,884,191.65	\$4,003,828.88	\$2,005,123.63	\$31,893,144.16

When you factor in the growth potential at three of the key industries on the west side of SR 66, the total impact still shows a possible loss of jobs, but an additional \$22 million in annual economic activity. The total net impact takes into account the direct investment or projected loss for each retail sector and then the business to business impact and the impact of employee spending. Table 3 above is the compilation of the combined impact of both the predicted retail and industrial consequences of the proposed SR 66 Truck Bypass project.

Once the primary (direct) impact is identified, it is necessary to estimate the ultimate impact on the economy. This study's forecasting model utilizes variables from a variety of national data sets. To reduce potential confusion, a specific definition of the major variables may be of use.

Industry Output

Industry output represents the value of the industry's total production. Industry output can be thought of as the value of industry sales plus or minus inventory changes. It should be emphasized that industry output is not a measure of an industry's income and therefore, cannot be directly compared to the Gross State Product (GSP) numbers reported by the BEA. The value of industry output is typically higher than GSP. It is a more comprehensive measure and therefore, is a better measure of true economic impacts. The IMPLAN model estimates the industry output data, which is derived from the U.S. Census Bureau's Economic Census, the Annual Survey of Manufacturers, and the Bureau of Labor Statistics growth model.

Employment

Employment is the total number of full-time wage and salary employees, plus the number of self-employed workers within a particular industry. Part-time workers' hours are aggregated into full-time equivalents (2,080 hours) and reported with the full-time workers. In our process, each year's activity is computed separately so that the employment effects are computed each year.

No single source of employment data is adequate for accurately estimating employment impacts. Due to nondisclosure rules, the employment figure reported by government agencies often underestimates true employment in a given county. In accordance with U.S. Code Title 13, Section 9, no datum is published that would disclose the operations of an individual employer or put an individual employer at an unfair disadvantage. In this study, as we narrow our focus to the county level, the number of firms representing an industry inevitably decreases. It is not uncommon for a single business establishment to be the sole operator in that industry in a particular county. If this is the case, the employment numbers are not disclosed and the employment in that region is understated. Fortunately, it is possible to reconstruct a region's employment by combining data from a variety of sources. Non-disclosure rules require that the individual reporting agency not reveal confidential information. However, other government agencies may report the missing data in another form. For example, the U.S. Department of Labor collects labor data as part of the Unemployment Insurance ES-202 program. These data are for "covered employees" of the Unemployment Insurance Program. Workers not "covered," such as self-employed workers, would not be included in the data. However, "not covered" workers would be included in the employment figures captured by the Department of Census County Business Patterns. By carefully combining the employment figures reported in the ES-202 data set, the County Business Patterns, the REIS data and the Internal Revenue Service Quarterly Payroll File (FICA), a fairly comprehensive employment figure can be reconstructed. The raw data is then "sectored" into the appropriate SICs and in turn, combined into the necessary industry vectors and IMPLAN matrices.

Section Six

Case Study—North Baltimore SR 18

North Baltimore Case Study

The announcement of new CSX Intermodal facility in Henry Township, Wood County just west of the Village of North Baltimore, began conversations on safety and efficiency concerns associated with the existing SR 18 alignment. An intermodal model hub allows container freight to be loaded and unloaded between rail and truck without any handling of the freight itself when changing modes. Intermodal transport allows shippers to combine the efficiencies of rail for long-haul routes with the flexibility of short distance trucks to achieve cost-effective, efficient and reliable freight transport.

Land area:	2.22 square miles.
Total Population	3,426 (2.8% increase since 2000)
Males:	1,780 (51.0%)
Females:	1,714 (49.0%)
Median age:	36.4 years
Population density:	1,572 people per square mile
Estimated median household income in 2014: \$42,101 (it was \$38,507 in 2000)	
Estimated per capita income in 2012: \$21,095 (it was \$16,894 in 2000)	
Estimated median house or condo value in 2012: \$74,160 (it was \$74,100 in 2000)	

Source: city-data.com

ODOT initiated project due to the anticipated increase in truck traffic as a result of the CSX Intermodal construction project as well as the existing congestion and problems with aged intersection design and a modernized transportation industry. The SR 18 original alignment came into downtown and made a 90 degree turn and headed south on Main Street, then another turn and headed east toward I75. ODOT prepared 4 alternatives for the bypass and each was studied and public input was gathered. The decided upon alternative was a new sweeping alignment that promoted a safe and effective route to the Interstate from the CSX facility. Bypass construction completed and opened to public on November 19, 2012.

The period during the bypass construction itself was hard on the existing downtown businesses, but the result after two years of existence is actually an increase in businesses and activity in North Baltimore's downtown district according to published comments from local business owners.

The Village of North Baltimore has not seen an increase in vacancy in the downtown sector or a



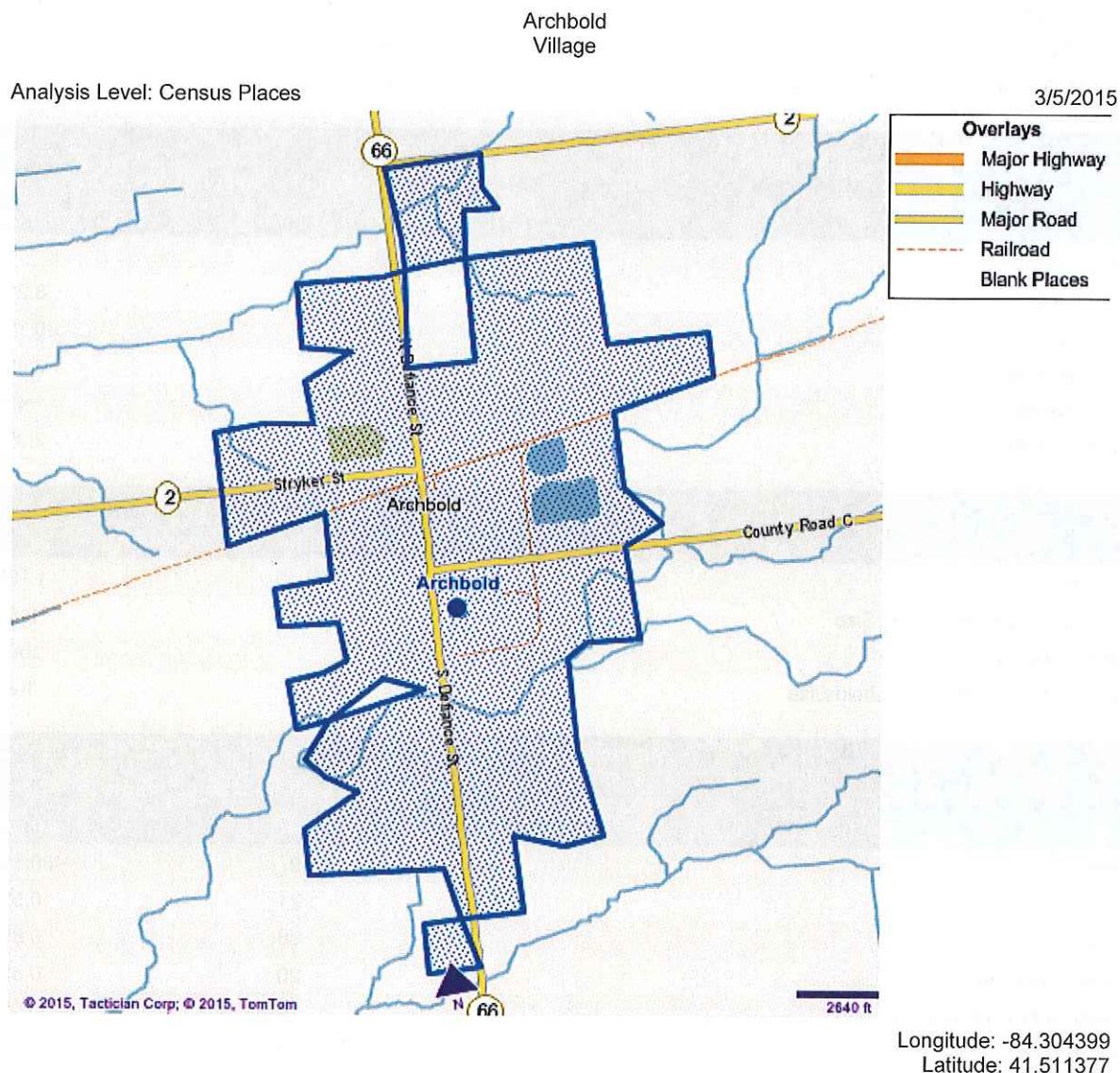
reduction in tax revenue after the completion of the project. In fact, there were more vacancies prior to completion of the bypass than there are currently. Some new businesses have popped up in the downtown and the median sales price of housing has risen significantly since the project completion.

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Appendix A
Detailed Demographic Profile
Village of Archbold

Detailed Demographic



Archbold

Population Change		
	Trade Area built from components	
	Number	Percent Change
1980 Census	3,417	
1990 Census	3,532	3.4%
2000 Census	4,309	22.0%
2010 Census	4,346	0.9%
2014 Projection	4,294	-1.2%
2019 Projection	4,300	0.1%

Households Change		
	Trade Area built from components	
	Number	Percent Change
1980 Census	1,213	
1990 Census	1,312	8.2%
2000 Census	1,715	30.7%
2010 Census	1,757	2.4%
2014 Projection	1,782	1.4%
2019 Projection	1,823	2.3%

Families (2014)		
	Trade Area built from components	
Families		1,198
Average Family Household Size		2.87
Households: Non-Family		584
Average Non-Family Household Size		1.27

Population by Race (2014)		
	Trade Area built from components	
	Number	Percent
White	3,897	90.8%
Black	21	0.5%
Asian	36	0.8%
Native American	20	0.5%
Hawaiian / Pacific Islander	0	0.0%
Two or More	84	2.0%
Other Race	235	5.5%
Total	4,293	100.0%

Hispanic Population (2014)		
	Trade Area built from components	
	Number	Percent
Hispanic	733	17.1%
Not Hispanic	3,561	82.9%
Total	4,294	100.0%

Income (2014)		
	Trade Area built from components	
Median Household Income	\$48,381	
Average Household Income	\$58,490	
Average Family Income	\$70,263	
Per Capita Income	\$24,446	

Households by Income (2014)		
	Trade Area built from components	
	Number	Percent
Less Than \$10,000	199	11.2%
\$10,000-\$14,999	55	3.1%
\$15,000-\$19,999	62	3.5%
\$20,000-\$24,999	50	2.8%
\$25,000-\$29,999	102	5.7%
\$30,000-\$34,999	185	10.4%
\$35,000-\$39,999	151	8.5%
\$40,000-\$49,999	105	5.9%
\$50,000-\$59,999	156	8.7%
\$60,000-\$74,999	210	11.8%
\$75,000-\$99,999	276	15.5%
\$100,000-\$124,999	150	8.4%
\$125,000-\$149,999	41	2.3%
\$150,000-\$199,999	14	0.8%
\$200,000-\$249,999	8	0.4%
\$250,000-\$499,999	5	0.3%
\$500,000+	15	0.8%
Total	1,784	100.0%

Households by Tenure (2014)		
	Trade Area built from components	
	Number	Percent
Owner Occupied	1,284	68.7%
Renter Occupied	499	26.7%
Vacant	86	4.6%
Total	1,869	100.0%

Daytime Population (2014)		
	Trade Area built from components	
	Number	Percent
Establishments		275
Employees		8,779

Population by Gender (2014)		
	Trade Area built from components	
	Number	Percent
Male	2,018	47.0%
Female	2,276	53.0%
Total	4,294	100.0%

Marital Status (2014)		
	Trade Area built from components	
	Number	Percent
Now Married	2,241	65.1%
Separated	91	2.6%
Divorced	211	6.1%
Never Married	654	19.0%
Widowed	248	7.2%
Total	3,445	100.0%

Household Structure (2014)		
	Trade Area built from components	
	Number	Percent
Married Couple Family with Children	389	32.4%
Lone Parent Male with Children	31	2.6%
Lone Parent Female with Children	128	10.7%
Married Couple Family No Children	592	49.4%
Lone Parent Male No Children	21	1.8%
Lone Parent Female No Children	38	3.2%
Total	1,199	100.0%

Total Population (2014)		
	Trade Area built from components	
	Number	Percent
Age 0-4	266	6.2%
Age 5-9	273	6.4%
Age 10-14	309	7.2%
Age 15-19	270	6.3%
Age 20-24	194	4.5%
Age 25-29	252	5.9%
Age 30-34	252	5.9%
Age 35-39	203	4.7%
Age 40-44	245	5.7%
Age 45-49	245	5.7%
Age 50-54	258	6.0%
Age 55-59	305	7.1%
Age 60-64	275	6.4%
Age 65-69	206	4.8%
Age 70-74	189	4.4%
Age 75-79	152	3.5%
Age 80-84	173	4.0%
Age 85+	229	5.3%
Total	4,296	100.0%
Median	42.6	

Total Male Population (2014)		
	Trade Area built from components	
	Number	Percent
Age 0-4	141	7.0%
Age 5-9	145	7.2%
Age 10-14	157	7.8%
Age 15-19	138	6.8%
Age 20-24	88	4.4%
Age 25-29	121	6.0%
Age 30-34	123	6.1%
Age 35-39	95	4.7%
Age 40-44	120	5.9%
Age 45-49	125	6.2%
Age 50-54	108	5.3%
Age 55-59	148	7.3%
Age 60-64	125	6.2%
Age 65-69	87	4.3%

Age 70-74	87	4.3%
Age 75-79	62	3.1%
Age 80-84	67	3.3%
Age 85+	83	4.1%
Total	2,020	100.0%
Median	40.1	

Total Female Population (2014)		
	Trade Area built from components	
	Number	Percent
Age 0-4	125	5.5%
Age 5-9	128	5.6%
Age 10-14	152	6.7%
Age 15-19	132	5.8%
Age 20-24	106	4.7%
Age 25-29	131	5.8%
Age 30-34	129	5.7%
Age 35-39	108	4.7%
Age 40-44	125	5.5%
Age 45-49	120	5.3%
Age 50-54	150	6.6%
Age 55-59	157	6.9%
Age 60-64	150	6.6%
Age 65-69	119	5.2%
Age 70-74	102	4.5%
Age 75-79	90	4.0%
Age 80-84	106	4.7%
Age 85+	146	6.4%
Total	2,276	100.0%
Median	45.1	

Population by Household Type (2014)		
	Trade Area built from components	
	Number	Percent
Family	3,441	80.1%
Non-Family	741	17.3%
Group Quarters	112	2.6%
Total	4,294	100.0%

Labor Force Employment Status 16 Plus (2014)		
	Trade Area built from components	
	Number	Percent
In Armed Forces	0	0.0%
Employed	2,034	94.9%
Unemployed	109	5.1%
Total	2,143	100.0%

Educational Attainment Age 25+ (2014)		
	Trade Area built from components	
	Number	Percent
< Grade 9	108	3.8%
Grades 9-12	297	10.3%
High School	1,176	40.9%
Some College	444	15.4%
Associate Degree	292	10.2%
Bachelor's Degree	342	11.9%
Graduate Degree	217	7.5%
Total	2,876	100.0%

Educational Attainment Age 25+ (2010)		
	Trade Area built from components	
	Number	Percent
No schooling completed	16	0.5%
Nursery-4th grade	7	0.2%
5th-6th grade	32	1.1%
7th-8th grade	74	2.5%
9th grade	108	3.6%
10th grade	43	1.4%
11th grade	119	4.0%
12th grade no diploma	27	0.9%
High school graduate, GED, or alternative	1,220	40.9%
Some college, < 1 year	173	5.8%
Some college, 1+ years, no degree	324	10.9%
Associate's degree	273	9.2%
Bachelor's degree	339	11.4%
Master's degree	211	7.1%
Professional school degree	11	0.4%
Doctorate degree	3	0.1%
Total	2,980	100.0%

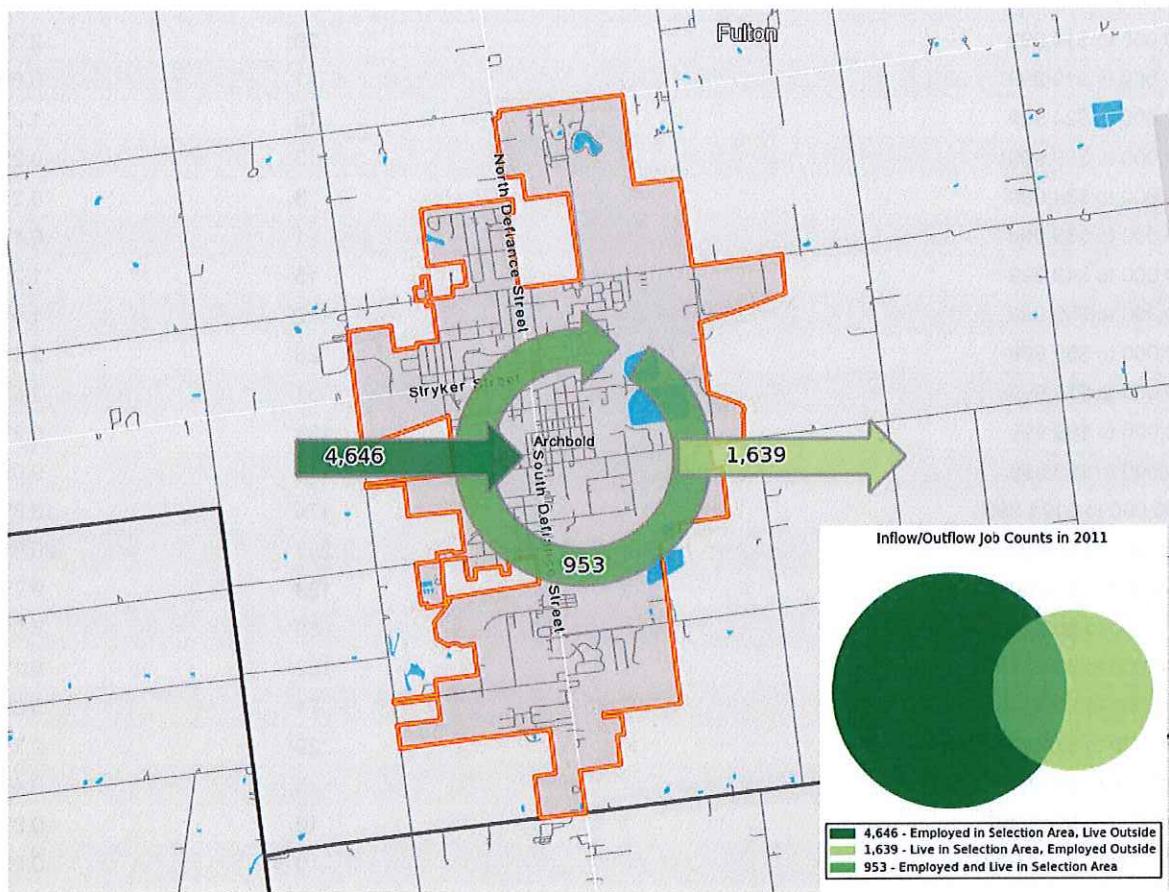
Educational Attainment Male Age 25+ (2010)		
	Trade Area built from components	
	Number	Percent
No schooling completed	3	0.2%
Nursery-4th grade	7	0.5%
5th-6th grade	5	0.4%
7th-8th grade	43	3.2%
9th grade	66	4.9%
10th grade	11	0.8%
11th grade	68	5.1%
12th grade no diploma	9	0.7%
High school graduate, GED, or alternative	542	40.3%
Some college, < 1 year	94	7.0%
Some college, 1+ years, no degree	168	12.5%
Associate's degree	59	4.4%
Bachelor's degree	205	15.2%
Master's degree	52	3.9%
Professional school degree	10	0.7%
Doctorate degree	3	0.2%
Total	1,345	100.0%

Educational Attainment Female Age 25+ (2010)		
	Trade Area built from components	
	Number	Percent
No schooling completed	13	0.8%
Nursery-4th grade	0	0.0%
5th-6th grade	27	1.7%
7th-8th grade	31	1.9%
9th grade	42	2.6%
10th grade	32	2.0%
11th grade	51	3.1%
12th grade no diploma	18	1.1%
High school graduate, GED, or alternative	678	41.5%
Some college, < 1 year	79	4.8%
Some college, 1+ years, no degree	156	9.5%
Associate's degree	214	13.1%
Bachelor's degree	134	8.2%
Master's degree	159	9.7%
Professional school degree	1	0.1%
Doctorate degree	0	0.0%
Total	1,635	100.0%

Housing Value of Owner-Occupied Housing Units: (2010)		
	Trade Area built from components	
	Number	Percent
Less than \$10,000	26	2.1%
\$10,000 to \$14,999	29	2.3%
\$15,000 to \$19,999	11	0.9%
\$20,000 to \$24,999	15	1.2%
\$25,000 to \$29,999	3	0.2%
\$30,000 to \$34,999	3	0.2%
\$35,000 to \$39,999	1	0.1%
\$40,000 to \$49,999	15	1.2%
\$50,000 to \$59,999	12	1.0%
\$60,000 to \$69,999	26	2.1%
\$70,000 to \$79,999	31	2.5%
\$80,000 to \$89,999	103	8.2%
\$90,000 to \$99,999	113	9.0%
\$100,000 to \$124,999	174	13.8%
\$125,000 to \$149,999	253	20.0%
\$150,000 to \$174,999	123	9.7%
\$175,000 to \$199,999	88	7.0%
\$200,000 to \$249,999	102	8.1%
\$250,000 to \$299,999	71	5.6%
\$300,000 to \$399,999	29	2.3%
\$400,000 to \$499,999	5	0.4%
\$500,000 to \$749,999	10	0.8%
\$750,000 to \$999,999	0	0.0%
\$1,000,000 or more	19	1.5%
Total	1,262	100.0%

Source: Tactician Corp and/or its suppliers.

Archbold Worker Flow



Inflow/Outflow Job Counts (All Jobs 2011)			
Count Share			
Employed in Archbold	5,599	100.00%	
Employed in Archbold but Living outside	4,646	83.00%	
Employed and Living in Archbold	953	17.00%	
Living in the Archbold 2,592 100.0%	2,592	100%	
Living in Archbold but Employed Outside	1,639	63.20%	
Living and Employed in Archbold	953	36.80%	

Worker Flow within Fulton County

Archbold		2011		Delta		2011	
		Count	Share			Count	Share
Total Workforce		2,592	100.0%	Total Workforce		1,750	100.0%
Employment Location				Employment Location			
Archbold village, OH		953	36.8%	Toledo city, OH		165	9.4%
Wauseon city, OH		243	9.4%	Delta village, OH		160	9.1%
Columbus city, OH		87	3.4%	Wauseon city, OH		125	7.1%
Napoleon city, OH		75	2.9%	Maumee city, OH		72	4.1%
Toledo city, OH		73	2.8%	Columbus city, OH		70	4.0%
Defiance city, OH		64	2.5%	Swanton village, OH		57	3.3%
Cleveland city, OH		35	1.4%	Archbold village, OH		52	3.0%
West Unity village, OH		24	0.9%	Cincinnati city, OH		24	1.4%
Cincinnati city, OH		17	0.7%	Cleveland city, OH		21	1.2%
Maumee city, OH		17	0.7%	Perrysburg city, OH		21	1.2%
All Other Locations		1,004	38.7%	All Other Locations		983	56.2%

Fayette		2011		Lyons		2011	
		Count	Share			Count	Share
Total Workforce		1,463	100.0%	Total Workforce		1,181	100.0%
Employment Location				Employment Location			
Archbold village, OH		164	11.2%	Columbus city, OH		104	8.8%
Columbus city, OH		87	5.9%	Toledo city, OH		32	2.7%
Wauseon city, OH		52	3.6%	Cincinnati city, OH		31	2.6%
Cleveland city, OH		47	3.2%	Cleveland city, OH		26	2.2%
Toledo city, OH		30	2.1%	Wauseon city, OH		25	2.1%
Cincinnati city, OH		27	1.8%	Akron city, OH		13	1.1%
Fayette village, OH		24	1.6%	Delta village, OH		13	1.1%
Napoleon city, OH		19	1.3%	Parma city, OH		12	1.0%
Findlay city, OH		14	1.0%	Archbold village, OH		11	0.9%
Bryan city, OH		13	0.9%	Middleburg Heights, OH		11	0.9%
All Other Locations		986	67.4%	All Other Locations		903	76.5%

Metamora		2011	
	Count	Share	
Total Workforce	265	100.0%	
Employment Location			
Toledo city, OH	67	25.3%	
Maumee city, OH	23	8.7%	
Swanton village, OH	16	6.0%	
Sylvania city, OH	15	5.7%	
Wauseon city, OH	12	4.5%	
Metamora village, OH	8	3.0%	
Oregon city, OH	6	2.3%	
Perrysburg city, OH	5	1.9%	
Holland village, OH	4	1.5%	
Defiance city, OH	3	1.1%	
All Other Locations	106	40.0%	

Pettisville		2011	
	Count	Share	
Total Workforce	182	100.0%	
Employment Location			
Archbold village, OH	42	23.1%	
Wauseon city, OH	38	20.9%	
Toledo city, OH	15	8.2%	
Napoleon city, OH	9	4.9%	
Maumee city, OH	5	2.7%	
Oregon city, OH	5	2.7%	
Defiance city, OH	4	2.2%	
Fayette village, OH	3	1.6%	
Perrysburg city, OH	3	1.6%	
Adrian city, MI	2	1.1%	
All Other Locations	56	30.8%	

Swanton		2011	
	Count	Share	
Total Workforce	2,276	100.0%	
Employment Location			
Toledo city, OH	362	15.9%	
Swanton village, OH	149	6.5%	
Maumee city, OH	97	4.3%	
Columbus city, OH	87	3.8%	
Cleveland city, OH	48	2.1%	
Wauseon city, OH	48	2.1%	
Perrysburg city, OH	36	1.6%	
Holland village, OH	26	1.1%	
Sylvania city, OH	26	1.1%	
Bowling Green city, OH	24	1.1%	
All Other Locations	1,373	60.3%	

Tedrow		2011	
	Count	Share	
Total Workforce	59	100.0%	
Employment Location			
Wauseon city, OH	18	30.5%	
Archbold village, OH	9	15.3%	
Toledo city, OH	6	10.2%	
Napoleon city, OH	4	6.8%	
Defiance city, OH	2	3.4%	
Oregon city, OH	2	3.4%	
Stryker village, OH	2	3.4%	
Morenci city, MI	1	1.7%	
Holland village, OH	1	1.7%	
Perrysburg city, OH	1	1.7%	
All Other Locations	13	22.0%	

<i>Wauseon</i>		2011	
	Count	Share	
Total Workforce	3,977	100.0%	
Employment Location			
Wauseon city, OH	1,048	26.4%	
Archbold village, OH	331	8.3%	
Toledo city, OH	206	5.2%	
Napoleon city, OH	191	4.8%	
Columbus city, OH	141	3.5%	
Defiance city, OH	76	1.9%	
Maumee city, OH	62	1.6%	
Delta village, OH	59	1.5%	
Cleveland city, OH	51	1.3%	
Cincinnati city, OH	39	1.0%	
All Other Locations	1,773	44.6%	

