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R&E

Lucas County R&E Report

Prepared by

Leroy Hushak, and Kathlene Black,
Ohio Sea Grant Extension, Department of Agricultural Economics,
The Ohio State University
The Lucas County Retention and Expansion Task Force

Support for this program was provided by the
Greater Toledo Convention and Visitors Bureau
in collaboration with Ohio Sea Grant Extension

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THE OHIO STATE UNIVERSITY EXTENSION

Lucas County

Business Retention and Expansion Program

Final Report

November 2, 1995

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1314 Kinnear Road
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614/292-8949, Fax 614/292-4364

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Introduction

The Ohio State University (OSU) Extension and the Ohio Department of Development have sponsored the Ohio Business Retention and Expansion (R&E) Program since 1986. The R&E Program provides action-oriented planning assistance to strengthen the economies of Ohio communities. The planning exercise is based on a survey conducted through in-person business visits that, in essence, asks two questions of local businesses:

> What can our community do to ensure that your business continues to operate locally?
>
> and
>
> What can we do to help your business expand?

The survey results are then used by a local Task Force to develop recommendations to improve the business climate of the community and to help local businesses remain competitive.

By remaining competitive, existing businesses are less likely to relocate, contract, or close. They are more likely to expand their current production levels, thereby increasing employment and stabilizing the local economy.

Goals

The Ohio R&E Program aims to assist communities in realizing both short-term and long-term goals:

> *Short-Term Goals*
>
> To develop a detailed local database about existing businesses
>
> To solve immediate problems of local businesses
>
> To display a pro-business attitude
>
> *Long-Term Goals*
>
> To implement an Action Plan for retention and expansion of existing businesses
>
> To facilitate coordination among existing local development organizations
>
> To establish a permanent business visitation program

In the short term, the R&E program provides a detailed database of information about existing industries. The data are gathered through a local R&E survey. In contrast to secondary data sources, which reveal regional or national averages and trends, survey data provides specific information unique to the community. Although both types of data are useful, the R&E survey provides community-specific information that is not available from published sources.

Communities enrolled in the program are often able to solve particular problems identified by local businesses before all the surveys are completed. In some cases, immediate action is necessary to retain a local business that is on the verge of moving or closing. Identifying and implementing solutions while the program is in progress helps build momentum for the development of a longer term strategy. Moreover, immediate action, along with the business visits themselves, demonstrate clearly the community's pro-business attitude and willingness to improve its business climate.

In the long term, a successful R&E Program leads to implementation of an Action Plan developed by the local R&E Task Force. The Action Plan identifies what will be done, who will do it, and when it will be done.

The purpose of the Action Plan is to increase the competitiveness of local firms. By attempting to solve problems for local firms, local leaders may be able to reduce costs by removing bottlenecks, settling disputes, or providing information about financial programs or other state and federal economic development assistance.

Many communities have a variety of local organizations involved in economic development, but lack a means of coordinating these efforts. The R&E Program assembles members from many groups in the community and facilitates coordination among organizations.

Despite the existence of many local development organizations, few communities have an on-going program of business visitation that reaches businesses of all sizes on a regular basis. Perhaps the most important goal of the R&E Program is to establish a permanent business visitation process to be carried out by one or more organizations within the community.

The Greater Toledo Convention and Visitors Bureau sponsored the R&E Program to obtain a better understanding of the hospitality industry in Lucas County. Their specific objectives were to:

- determine whether local visitor related businesses were expanding, shrinking, or remaining static;
- determine if hospitality related businesses in the area recognized the Greater Toledo Convention and Visitors Bureau as the lead agency for visitor advertising and promotion;
- utilize the survey results for their marketing and strategic plans; and
- utilize the program to initiate a cooperative promotion effort among local hospitality related businesses.

Participants in the Lucas County R&E Program

Lucas County enrolled in the R&E Program under the financial sponsorship of the Greater Toledo Convention and Visitors Bureau (GTCVB). The cooperation of the Toledo Area Chamber of Commerce and Ohio Sea Grant is also acknowledged.

Local leadership is the key to the success of the Retention and Expansion Program. In Lucas County, Mary Bielen (Ohio Sea Grant Extension) served as the R&E Task Force Coordinator and as R&E Consultant. Carolyn Schermbeck (GTCVB) assisted Mary and the Task Force as the Co-Coordinator of the program.

The R&E Task Force (see Appendix A) assisted in finalizing the local questionnaire, recruiting volunteers, reviewing the business surveys, and developing the Retention and Expansion Action Plan (page 35). Approximately 39 Volunteer Visitors administered the R&E survey (see Appendix B).

Leroy Hushak of the OSU Extension R&E Office and Sea Grant provided assistance in the design of the survey, training volunteers, analysis of the data, and writing of this report. The Ohio Department of Development provided grant funds to cover a portion of R&E Program costs.

This report represents both an ending and a beginning. The retention and expansion process that has taken place over the last year is one component of the larger community and economic development efforts taking place in Lucas County. As an end of the R&E process, this report explains the work completed during that process, the findings as a result of that process, and describes recommendations based on the findings. More importantly, perhaps, this report represents a beginning because it further describes a detailed R&E Action Plan developed by the Lucas County R&E Task Force designed to address the major issues uncovered during the R&E process.

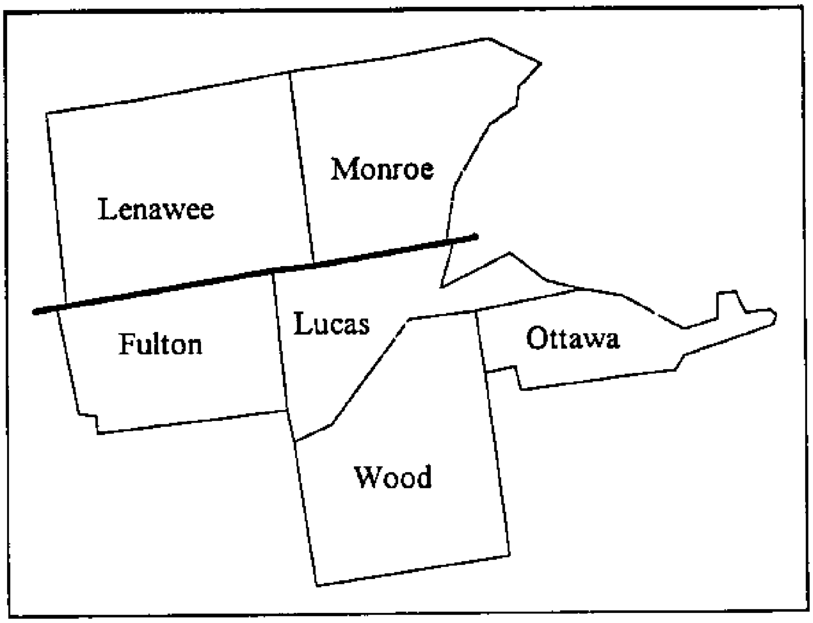

Figure 1. The Lucas County Region.

Local-Regional Social and Economic Profile

Any detailed planning exercise, such as the R&E Program, is enhanced by a review and analysis of the recent trends and conditions in the community. The OSU Extension R&E Program provides this local-regional social and economic profile as a means to place the recent trends in Lucas County in perspective with the current R&E Program survey results. The data present various social and economic measures of

Lucas County in relation to Ohio or the Lucas County Region.[a] The Lucas County Region, for purpose of this report, is shown in Figure 1.

Population

The characteristics and trends of a community's population can reveal much about the community. Table 1 shows the base population trends for Lucas County, Lucas County Region, and for Ohio. Since 1984 the population in Lucas County has been stable while the regional average has increased slightly. Table 2 indicates the total employment for Lucas County increased by about 18 percent between 1983 and 1992. Employment increased in all sectors except mining and manufacturing.

	Lucas County	Regional Total	Ohio
1983	464,700	867,700	10,738,300
1984	461,900	865,700	10,738,700
1985	460,700	866,300	10,736,100
1986	461,100	866,800	10,731,600
1987	460,900	867,800	10,761,500
1988	461,600	871,600	10,800,100
1989	462,100	873,500	10,829,300
1990	462,500	875,700	10,862,600
1991	462,000	877,400	10,939,700
1992	461,500	878,900	11,021,400

Table 1. Base Population data for Lucas County.

[a] The authors would like to acknowledge Mr. Sam Crawford, Community Development District Specialist, South District, OSU Extension ,the OSU Extension Data Unit and Mr. Tim Pritchard, Research Associate, Department of Agricultural Economics, for their assistance in the development of the Lucas County Local-Regional Social and Economic Profile. Establishment and employment data provided by County Business Patterns 1992.

Number of employees	*'83*	*'84*	*'85*	*'86*	*'87*	*'88*	*'89*	*'90*	*'91*	*'92*
Ag. Services, Forestry, Fisheries	393	412	505	565	505	505	690	684	644	759
Mining	152	149	134	169	127	95	129	121	104	113
Contract Construction	5,983	6,506	6,683	6,793	7,368	7,826	9,124	9,273	7,831	7,723
Manufacturing	45,266	48,371	46,774	47,793	47,011	45,454	43,339	39,424	37,881	36,101
Transportation, Public Utilities	8,640	9,089	8,706	8,719	8,256	8,391	11,434	11,234	10,651	10,888
Wholesale Trade	10,500	11,174	11,822	12,007	11,545	12,250	12,597	12,331	11,668	10,990
Retail Trade	34,279	36,430	38,196	39,925	41,562	43,604	44,424	44,645	43,160	42,574
Finance, Ins., Real Estate	8,757	8,761	8,310	10,970	10,821	11,231	11,086	11,390	10,033	9,614
Services	49,574	52,123	55,324	58,222	65,451	66,015	71,967	71,810	74,865	75,112
Not Classifiable	638	1,104	1,454	1,437	348	916	1,472	495	273	84
TOTAL	**164,182**	**174,119**	**177,908**	**186,600**	**192,994**	**196,287**	**206,262**	**201,407**	**197,110**	**193,958**

Table 2. Total Employment for Lucas County Businesses.

Income

The income in a community tells much about the financial "wealth" of its residents. Table 3 lists Lucas County total annual payroll by each sector for 1992. The two largest sectors in terms of total annual payroll are manufacturing and services. Manufacturing is the highest paying sector with a payroll of $38,762 per employee; it is also a declining sector. Other high paying sectors are construction, transportation, and public utilities, wholesale trade, and finance, insurance, and real estate, all of which have grown since 1983 but declined during the recession years of 1990-91. Retail trade is the fastest growing sector, but the lowest paying with a payroll of $11,816 per worker.

The percent of nonfarm private earnings, by economic sector, in 1992 for Lucas County is presented in Figure 2.

Lucas County	Annual Payroll ($1,000) 1992
Agricultural Service, Forestry, and Fishing	12,263
Mining	3,231
Construction	264,545
Manufacturing	1,399,365
Transportation and Public Utilities	316,585
Wholesale Trade	334,803
Retail Trade	503,050
Finance, Insurance, Real Estate	263,961
Services	1,529,054
Unclassified establishments	3,016
Total	**4,629,873**

Table 3. Lucas County Payroll, 1992..

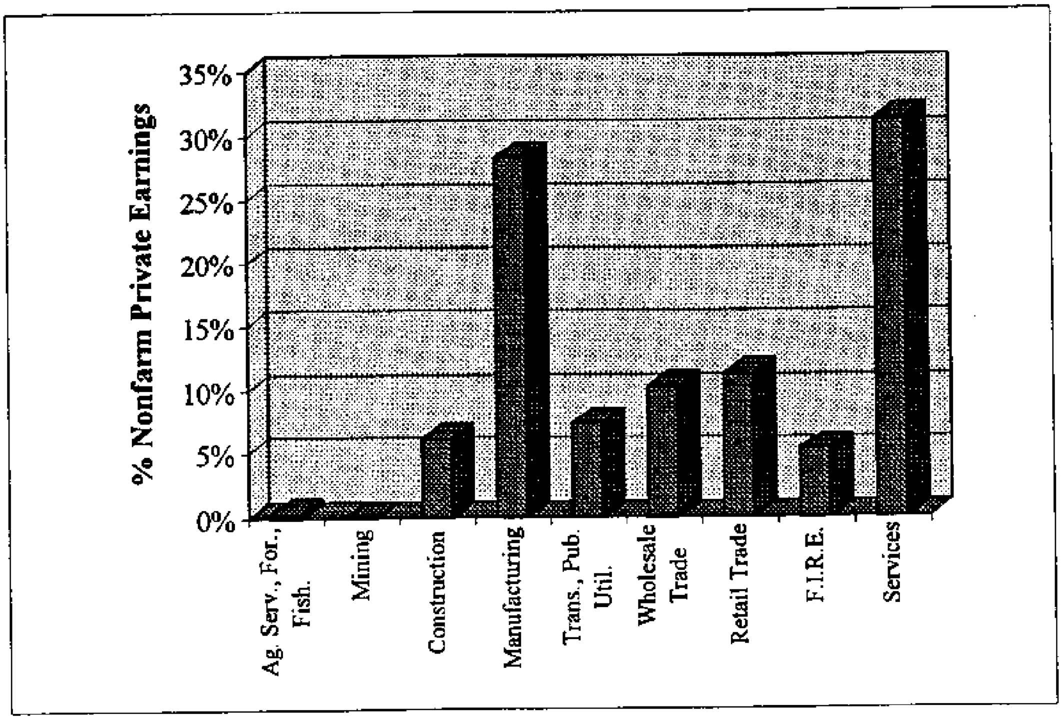

Figure 2. Percent of Nonfarm Private Earnings, 1992, Lucas County.

The per capita personal income of a community provides an average measure of the consumption or spending capacity of all individuals in a community. Figure 3 shows the per capita personal income in Ohio, the Lucas County Region, and Lucas County.

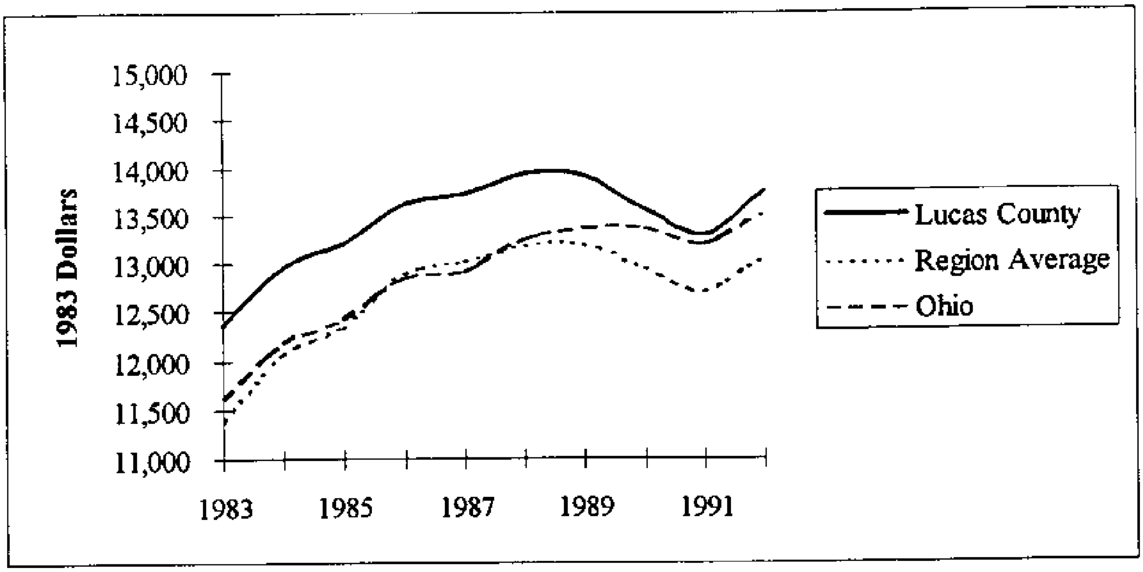

Figure 3. Per Capita Personal Income, 1983-1992, Ohio, Region, and Lucas County

Another measure of a community's economic vitality is the commuting patterns of its labor force. In general, a community that has net in-commuting demonstrates availability and abundance of employment. The US Census Bureau reports commuting patterns in the 1990 census. Figure 4 shows the net commuting patterns between Lucas County and surrounding counties. The figure indicates there is a net inflow of workers into Lucas County from surrounding counties.

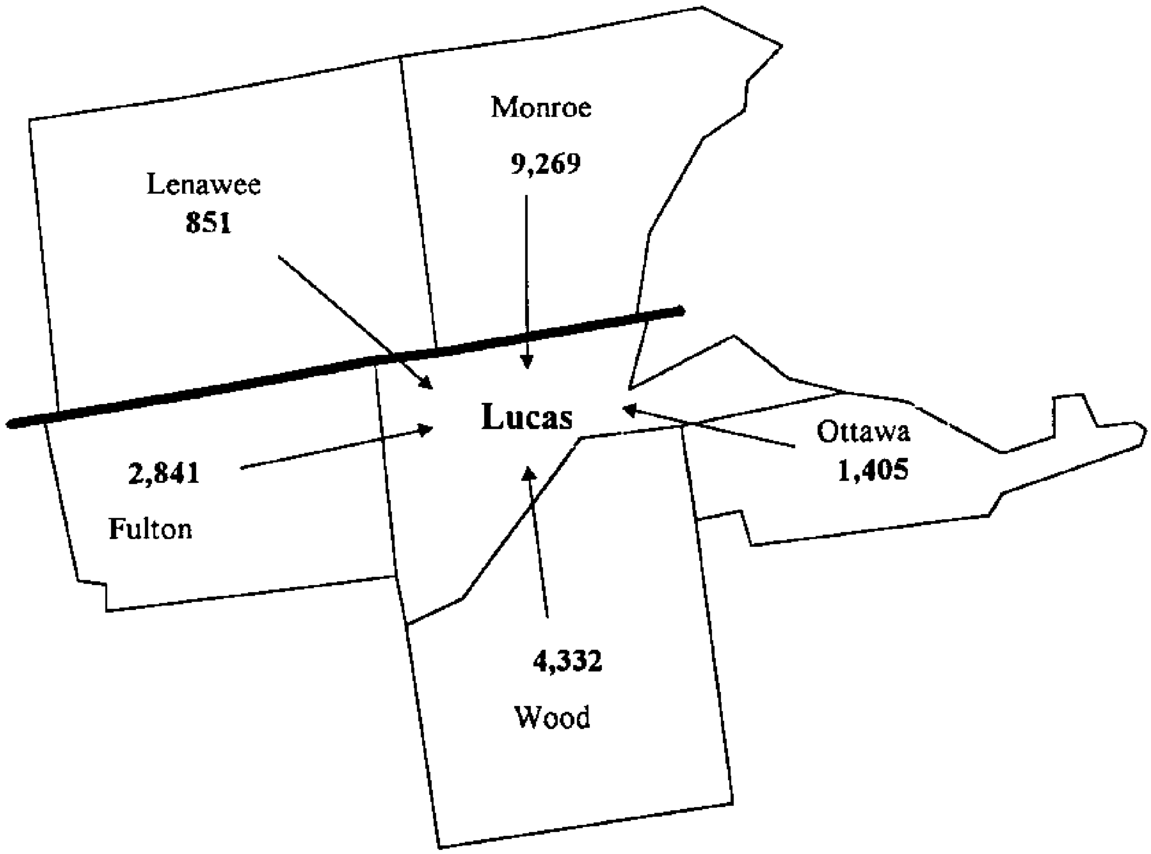

Figure 4. Commuting Patterns, 1990, Lucas County.

Labor market area demand analyses have been conducted by the Ohio Bureau of Employment Services for the Job Training Partnership service delivery areas (SDAs).[b] Lucas County falls within SDA-9. Figure 5 shows the projected percentage change of employment for SDA-9, by occupation, between 1991 and 2000. The figure indicates a strong increase in Auto Repair and Parking, and Truck and Warehousing.

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[b] Labor Market Projections, 1991-2000. Available by SDA from OBES Labor Market Information Division.

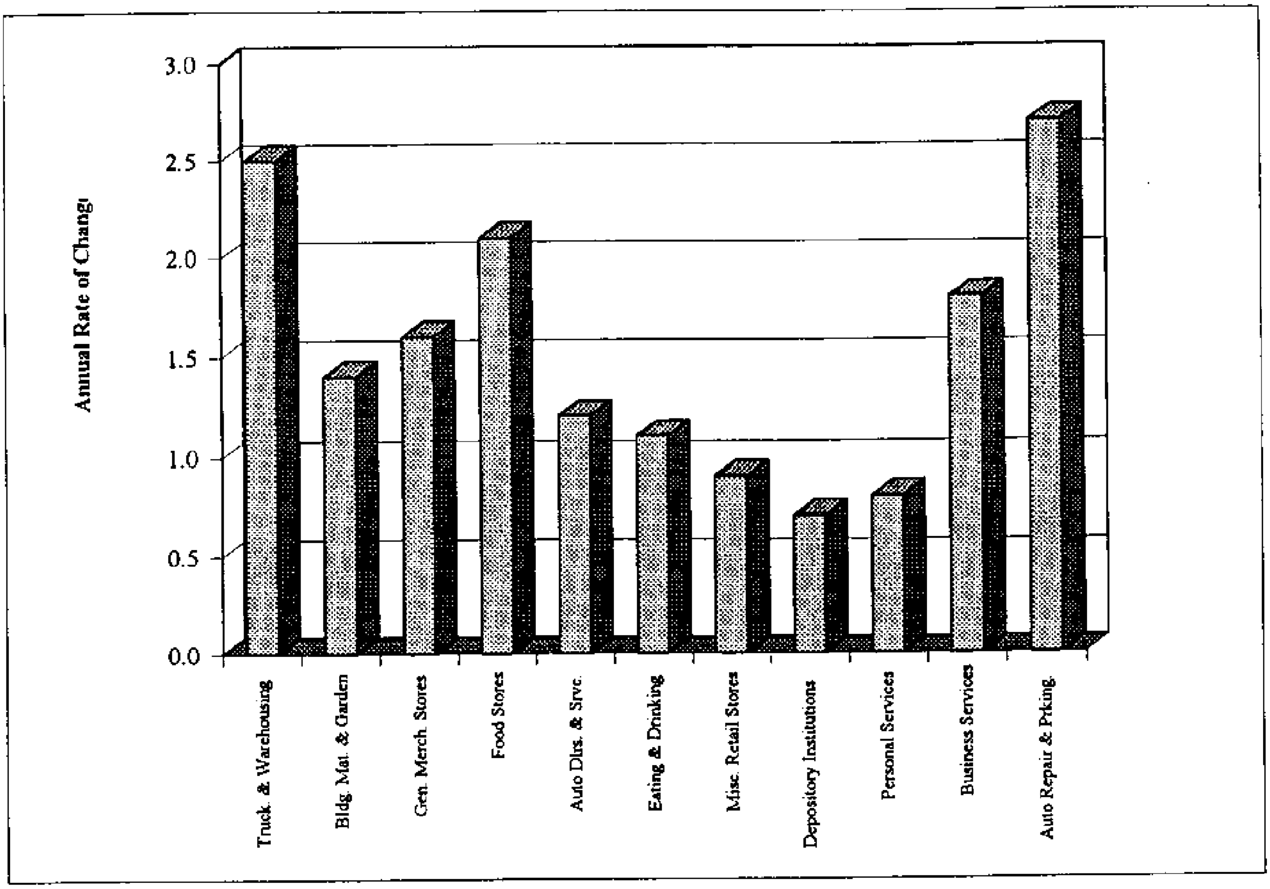

Figure 5. Projected Employment Changes, Retail Occupations, 1991-2000.

Table 4 indicates the number of establishments in selected sectors by employment size for 1992. Most of Lucas County businesses are small in nature (one to nine employees). As mentioned the service industry is one of the largest sectors in Lucas County. What Table 4 indicates is that most of the service businesses employ one to four individuals.

Lucas County	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 249	250 to 499	500 or more
Agricultural Service, forestry, and Fishing	85	27	20	7	na	na	na	na
Mining	5	1	3	2	na	na	na	na
Construction	545	158	96	56	6	10	1	1
Manufacturing	216	119	132	134	52	46	10	6
Transportation and Public Utilities	163	69	47	49	15	14	3	1
Wholesale Trade	398	192	163	97	27	8	1	1
Retail Trade	1,089	775	478	388	121	44	7	na
Finance, Insurance, Real Estate	555	231	111	51	16	4	3	2
Services	2,116	947	508	327	133	57	22	4
Unclassified Establishments	99	3	3	na	na	na	na	na
Total	**5,271**	**2,522**	**1,561**	**1,111**	**370**	**183**	**47**	**15**

Table 4. Number of Establishments by Employment size, 1992.

Retail Trade Area Analysis

A brief retail trade area analysis of Lucas County is provided here to estimate the performance of the retail sector in Lucas County. A retail trade area analysis uses retail sales data to demonstrate the retail characteristics and estimated ability of a community's retail market to attract retail dollars.

The dollar amount of the Lucas County Region's retail sales, by merchandise categories, made in Lucas County is presented in Figure 6. The automobile sales for Lucas County in 1992 are the largest of total retail sales. In addition, the level of retail sales in Lucas County, as a percent of sales in the Lucas County Region, by merchandise category in 1988 through 1992 is presented in Figure 7. For 1992, general merchandise has the largest percent followed by furniture, appliances, food, and automobile.

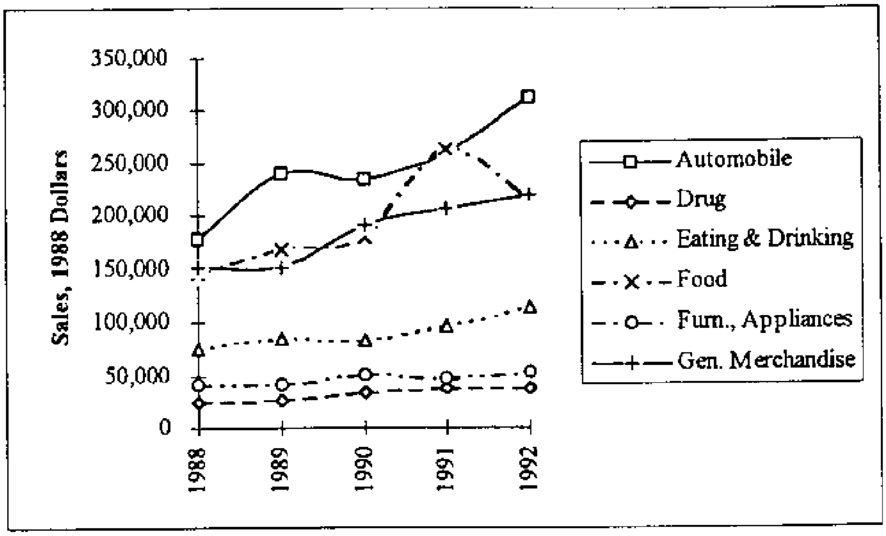

Figure 6. Retail Sales, 1988 Dollars (Millions), 1988-1992, Lucas County Region.

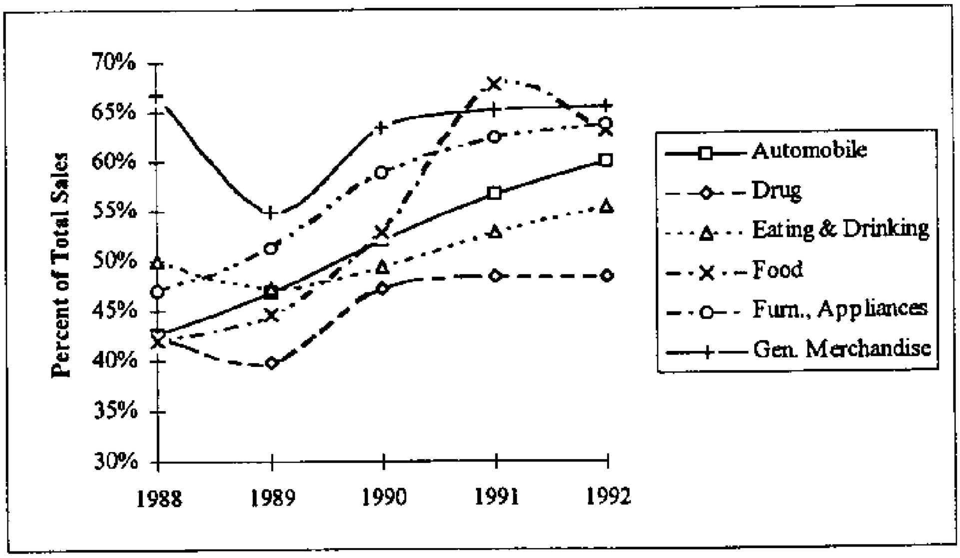

Figure 7. Retail Sales by Merchandise Category, 1988-1992, Lucas County, as a percent of the Lucas County Region.

A trade area analysis pull factor is one way to measure the performance of a community's retail market. A pull factor is a relative measure of a retail area's ability to capture local and nonlocal dollars. Community pull factors below 1.0 indicate that is local income is spent on retail goods outside the community. Conversely, pull factors greater than 1.0 indicate that a community's retail market is attracting dollars from outside the community.

In Figure 8, pull factors for total retail sales in Lucas, Fulton, Ottawa, and Wood Counties are shown. The Lucas County pull factors exceed 1.0 in all years suggesting that Lucas County businesses sell more goods and services to people from other counties than businesses in other counties sell to residents of Lucas County. Figure 9 shows pull factors for selected retail sectors in Lucas County. With the exception of eating and drinking places, there is a consistent drop in pull factors after 1988.

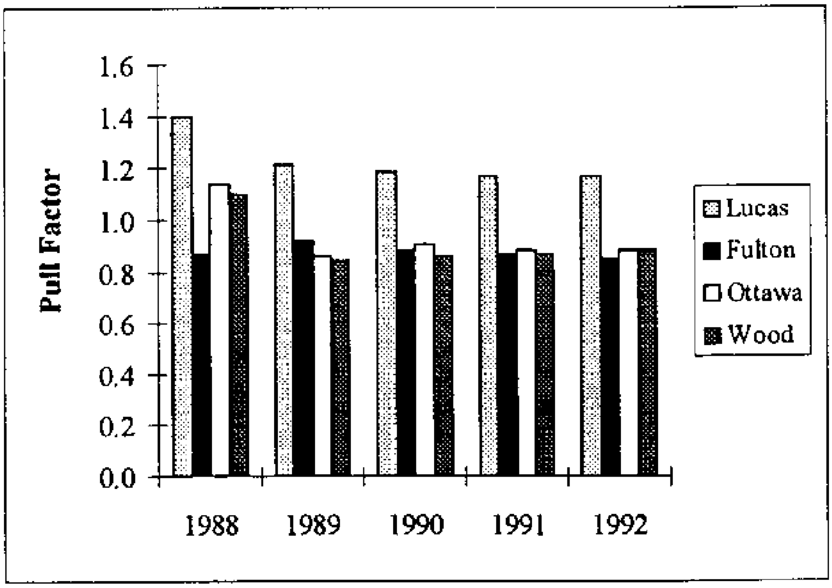

Figure 8. Pull Factors, Total Retail Sales, 1988-1992.

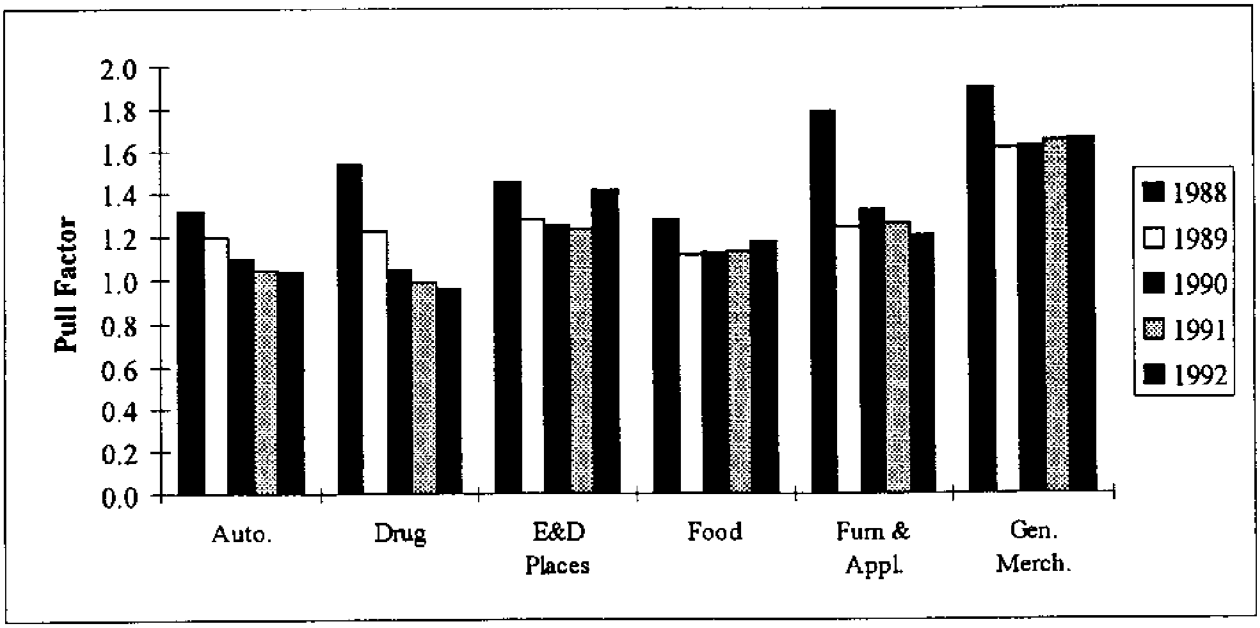

Figure 9. Pull Factors for Selected Retail Sectors in Lucas County.

Tourism

Ohio's travel and tourism industry is approaching a $10 billion industry based on 1994 business receipts as estimated by the MarketVision Research, Inc. study for Ohio's Division of Tourism, Ohio Department of Development (Table 5). The MarketVision data is one of two sources of travel and tourism information for Ohio; a second source of data is the U.S. Travel Data Center. These two sources of data, which use slightly differing definitions of the travel and tourism industry, are broadly consistent except for payroll. The U.S. Travel Tax Receipts include federal taxes while MarketVision data is only state and local. On a full-time equivalent basis, employment estimates are similar.

MarketVision data is available for those counties which purchase county level estimates. For 1994, six of the eight Lake Erie coastal counties (Lake Erie Escapades Region) have county estimates (Lake and Ashtablula counties do not); for 1992 five of the counties have estimates (Table 6). Business receipts in the coastal area exceeded $2.7 billion in 1994, or 29 percent of the Ohio total. Lucas County comprises about 20 percent of coastal travel and tourism compared to over 60 percent from Cuyahoga County.

	Travel Expenditures	Business Receipts[a]	Tax Receipts[a, b]	Payroll	Total Employment	Full-Time Employment
1990[c]	$7,822.2	$6,970.4	$1,008.0	$1,718.4	na	141.3
1992[c]	$8,162.2	$7,329.8	$1,145.1	$1,855.9	na	139.4
1992[d]		$8,875.0	$489.0	$4,286.0	323.9	na
1994[d]		$9,350.0	$510.0	$4,320.0	337.3	168.3

a Business receipts equal travel expenditures less taxes paid by those businesses. Tax receipts include these taxes plus other taxes generated but not paid by travelers.

b. . U.S. Travel Data Center estimates include federal tax receipts while the MarketVision estimates include only state and local tax receipts.

c. U.S. Travel Data Center.

d. Market Vision Research, Inc. Study.

Table 5. Travel Generated Business, Ohio ($ Mil, 1,000 Employees).

	Business Receipts	Payroll	Total Employment	Full-Time Employment
Lake Erie Coast				
1992[a]	$2,523.3	$1,183.1	88.1	45.5
1994[b]	$2,742.7	$1,283.4	95.1	47.0
Lucas County				
1992	$475.4	$221.0	18.8	8.6
1994	$498.0	$232.6	19.1	9.4

a. Lucas, Ottawa, Erie, Lorain, and Cuyahoga Counties.

b. Lucas, Ottawa, Sandusky, Erie, Lorain, and Cuyahoga Counties.

Table 6. Travel Generated Business ($Mil, 1,000 Employees).

Table 7 compares the Greater Toledo Convention and Visitors Bureau budget and MarketVision travel generated business receipts with those of other selected Ohio metropolitan areas. Each dollar of the bureau's budget is linked to $853 in travel generated business. The bureau's budget would need to increase by a factor of two to three to make it comparable to the other four metropolitan area bureau budgets.

Convention and Visitor Bureau	Convention and Visitor Bureau Budgets[1] ($Mil)	Travel Generated Business Receipts[2] ($Mil)	Ratio: Receipts/Budgets ($)
Cincinnati	4.5	1,316.0	292
Columbus	3.2	1,258.0	393
Cleveland	5.0	1,781.0	356
Akron	1.8	497.6	276
Toledo	.584	498.0	853

[1] Source: Greater Toledo Convention and Visitors Bureau

[2] Ohio Travel and Tourism Economic Impacts, State Report 1994, MarketVision Research, Inc.

Table 7. Comparison of Travel Generated Business Receipts in Metropolitan Counties to Convention and Visitor Bureau Budgets.

Major Findings and Immediate R&E Accomplishments

As the Lucas County business surveys took place the Task Force reviewed the business surveys for items that required immediate action. The Task Force made every attempt to address any immediate concerns or requests for assistance as well as focusing on any "red flag" issues (such as a business moving or closing) that were uncovered.

Short-term accomplishments included the following:

* Each of the businesses surveyed indicated an interest in information on State of Ohio business programs, other business programs and/or various forms of advertising. All businesses were mailed this requested information.

* Over one-half of the businesses surveyed had renovaton or expansion plans. Each of them was sent information on financial assistance and the local economic development agencies that could potentially assist.

*In addition, those businesses interested in cooperative adversiting were sent a list of other businesses interested in the same.

*Finally, all businesses indicated an interest in various business development seminars that were put on a mailing list for future educational program offerings.

Survey Results

During the Fall of 1994 the Lucas County R&E Program initiated in-person business visits to collect information on the needs of local businesses and their perception of Lucas County. The highlights of the business surveys are presented here. The names of the businesses that were surveyed are included in Appendix C. Complete, aggregate results of the business surveys and the survey instrument used are included in Appendix D.

General Information

The Greater Toledo Area Tourism Business R&E program visited 60 visitor oriented businesses; all but five (8%) of which were within Lucas County (Figure 10).

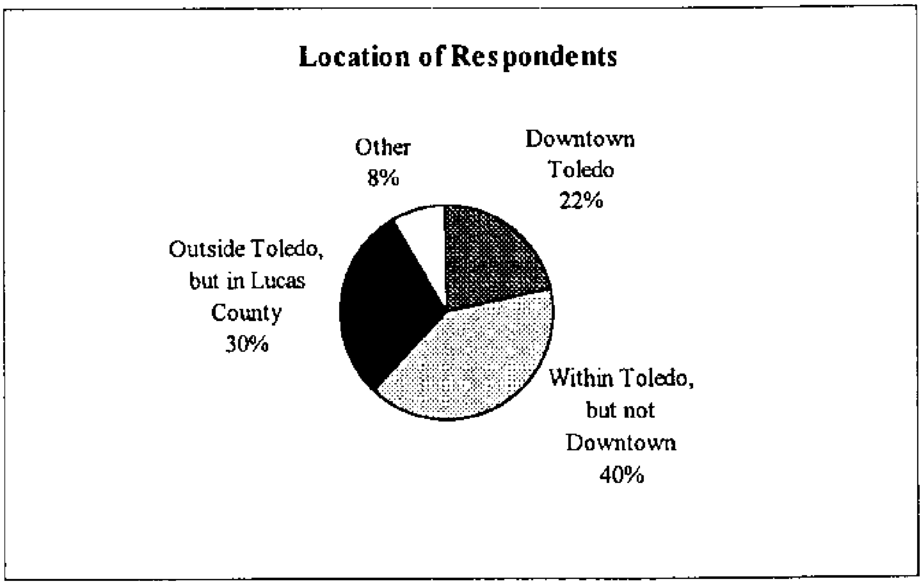

Figure 10. Location of Surveyed Businesses.

In most cases, the manager (48%) or owner and manager (28%) were interviewed (Appendix, Q2). Forty-one of the businesses were locally owned, four were part of a regional chain and 13 were part of national or international chains (Appendix, Q3).

The largest number of full-time employees (2,878) are located in businesses within Toledo, but not downtown (Table 8). Ten businesses that belong to national chains employ 2,495, followed by 32 locally owned and operated businesses employing 2,092 (Table 9).

Location of business	*Firm Employment*
Downtown Toledo	561
Within Toledo, but not downtown	2878
Outside Toledo, but within Lucas County	1319
Other	166

Table 8. Location of Businesses by Employment.

Type of Establishment	*Firm Employment*	*Number of Firms*
Locally Owned and operated	2092	32
Regional Chain	204	4
National Chain	2495	10
International Chain	124	3

Table 9. Type of Establishment by Employment.

Businesses were asked to list the major products or services provided (Table 10). Of the 58 businesses that provided this information, the six most frequent primary and secondary products or services of the businesses visited were:

Product or Service	Primary	Secondary
Eating and drinking places	13	8
Amusement, theater, golf	8	4
Hotels and other lodging	6	0
Automotive rental, repair, etc.	3	4
Food Stores	4	1
Apparel and clothing	3	2

Table 10. Primary and Secondary Products of Surveyed Businesses.

The largest core of respondents are restaurants and other food facilities, amusements and lodging facilities. Other business types are scattered over a wide array of business types (Appendix Q15). In this analysis we highlight major findings of these visits and identify major issues identified by the visited businesses.

Employment Information

A total of 4,868 full-time employees and 3,209 part-time employees were reported by the 60 visited businesses (Table 11), with an additional 937 persons employed seasonally (Appendix, Q6). Only 10 percent of these employees live outside of Lucas County, with two percent living beyond counties adjacent to Lucas County (Table 12).

Category	Full-Time	Part-Time	Average Hourly Wage
Clerical or administrative	429	123	8.16
Professional	412	187	15.94
Technical	503	211	8.33
Management	437	3	19.49
Sales	2457	1378	8.02
Maintenance or janitorial	244	97	7.97
Other	386	1210	3.08
Total	4868	3209	

Table 11. Wage Rates of Employees in the Surveyed Businesses.

Place	Average Percent
Within Toledo	58.6
Outside Toledo, but within Lucas County	28.9
A county adjacent to Lucas County	10.8
Other areas besides a., b., or c.	1.8
Total	100.0

Table 12. Location of Employees.

One-half of the full-time employees are in sales earning about $8.00 per hour (Table 11). Sales also dominate the part-time (43%) and seasonal (47%) categories. About 17 percent of total employees are in the more highly paid professional and management positions.

Improved skills in communications and salesmanship were the two most frequently identified training needs by numbers of businesses and numbers of employees of these businesses (Figure 11). Inventory control and employee management were the two most frequently identified managerial skills in need of upgrading, each by over one-third of businesses, while word-processing, spreadsheets and data base management were listed as computer training needs by about one-third of the businesses visited.

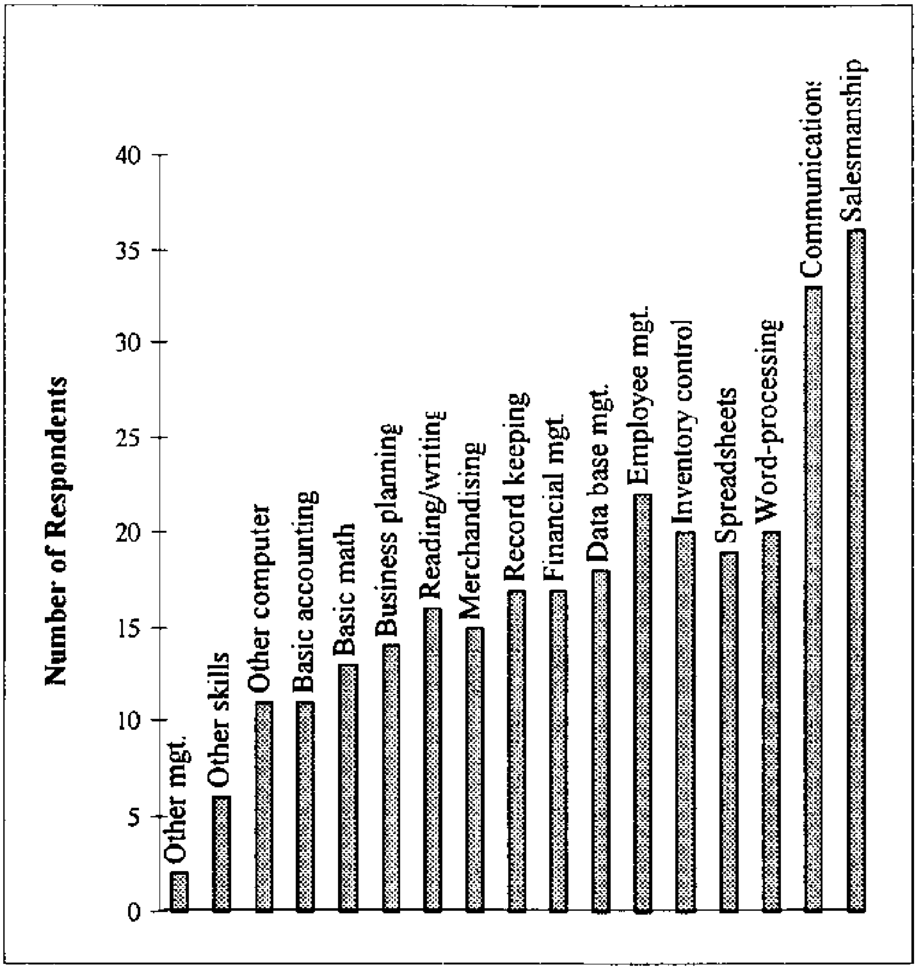

Figure 11. Training Needs of Current Employees.

Customer Base

The primary customer base of the Toledo area's visitor-oriented businesses appears to be Toledo residents followed by Lucas County residents living outside of the city of Toledo (Table 13). Only two businesses identified a county adjacent to Lucas as the primary residence of customers. However, 12 businesses listed areas beyond adjacent counties as the primary residence of customers; these businesses which employed 2,445 workers, can provide the core of a strategy to develop an expanded visitor base for the Greater Toledo area.

Place	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Weight[a]
Within Toledo	31	12	4	7	175
Outside Toledo, within Lucas County	11	32	11	0	162
A county adjacent to Lucas County	2	9	34	8	111
Outside of adjacent counties	12	3	4	35	100

[a] Weight is calculated by multiplying the number ranked 1 by 4, the number ranked 2 by 3, and so forth.

Table 13. Location of Customers.

Summer and Fall were identified as the first and second busiest seasons, with Spring a close third (Appendix, Q11). This is in contrast to the highest level of seasonal employment in Spring (Appendix, Q6). Friday and Saturday were the busiest days of the week (Appendix, Q12), while afternoon and evening were the busiest hours of the day (Appendix, Q13).

Firm Characteristics

Most businesses experienced an increase in customers, sales and profits over the past five years (Figure 12); most also reported an increase in competitors. However, a disturbing number reported decreases in customers (34%) and profits (30%) during a period of general business prosperity. Many of these businesses may have trouble surviving another recession unless they strengthen their business base.

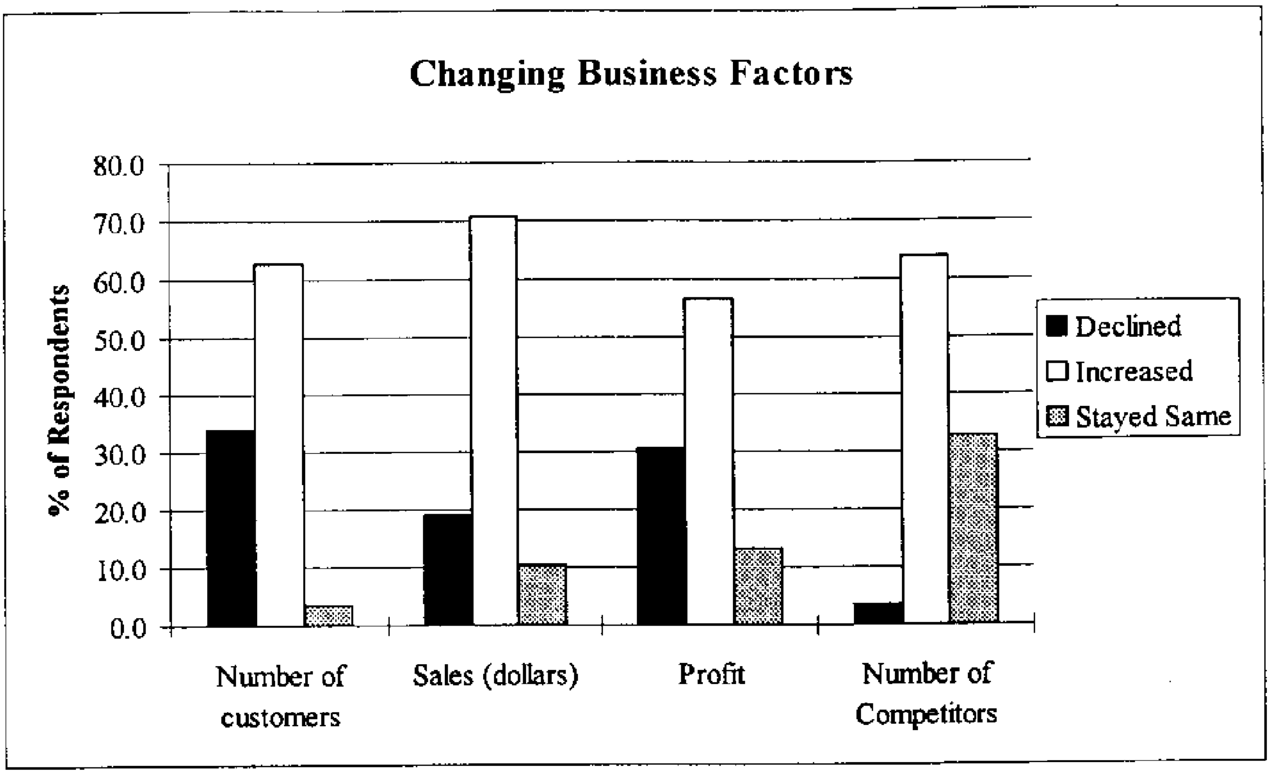

Figure 12. Business Factors of Surveyed Businesses.

Daily newspapers and radio were the two most frequently used advertising media (Table 14). Visitor guides and group advertising ranked rather low; these are two of the primary means for reaching visitors. However, businesses ranked both advertising media relatively high on the interest question. About one-third of the businesses reported sharing advertising expenses in the form of cooperative advertising, cooperative coupons or area promotion (Appendix, Q17). Another one-third said they were not sharing expenses; of these about two-thirds would consider sharing advertising arrangements.

Type	Used[a]	Interest[a]
Yellow pages	102	35
Daily newspapers	122	23
Weekly newspaper	61	18
Weekly shopper paper	9	34
Radio	105	27
TV	69	46
Billboards	40	28
Direct mail advertising	76	33
Visitor's guides	53	39
Magazines	38	12
Brochures	64	13
Group Advertising	11	35
Other	0	0

[a] Weighted score, type ranked 1 multiplied by 5, ranked 2 multiplied by 4, etc.

Table 14. Advertising Media Used by Surveyed Businesses.

Many of the businesses (63%) own or lease sufficient property to renovate or expand their businesses (Appendix, Q18). About one-half were considering renovation or expansion when visited (Appendix, Q19) while 30 percent (18) were considering opening another outlet for their business (Appendix, Q20). The most frequent constraints to renovation or expansion are the need for financial assistance or insufficient space (Appendix, Q19.1).

Eleven of the eighteen businesses planned to open another outlet in one to three years, but five had a time horizon of less than one year (Appendix. Q20.1). Seven planned to open their outlet within the current business area and another five in a different area of Lucas County (Appendix, Q20.2).

Two businesses were planning to move their establishments, one in six months and one did not respond. One plans to stay in Lucas County and one plans to move outside of Ohio (Appendix, Q21, 21.1, 21.2). Two businesses were planning to close and one to sell the business (Appendix, Q22.a).

The most frequently used Ohio business assistance program was the Job Creation Tax Credit program (7 businesses), followed by school-to-work forums (Appendix, Q23). School-to-work forums, the Job Creation Tax Credit program, mini-loans, community reinvestment areas and enterprise zones were the most frequently mentioned programs that businesses would like to learn about. Very few businesses had used Ohio State University Extension education programs, but one-half would like to learn about customer relations/marketing, one-third about business image seminars, and 30 percent about small business finance (Appendix, Q24).

Other programs used by 20 percent or more of the visited business are employee training, health care insurance, workers compensation and employee safety (Appendix, Q25). Some of the businesses would like to learn more about these and many other programs which may be of use to them.

The Community

In the judgment of area visitor-oriented businesses, the Toledo area is a high cost place to do business with respect to public utility costs, health care costs, workers compensation costs and inventory taxes (Figure 13). Only for transportation costs did more businesses say the Toledo area was lower rather than higher in costs (Appendix, Q26).

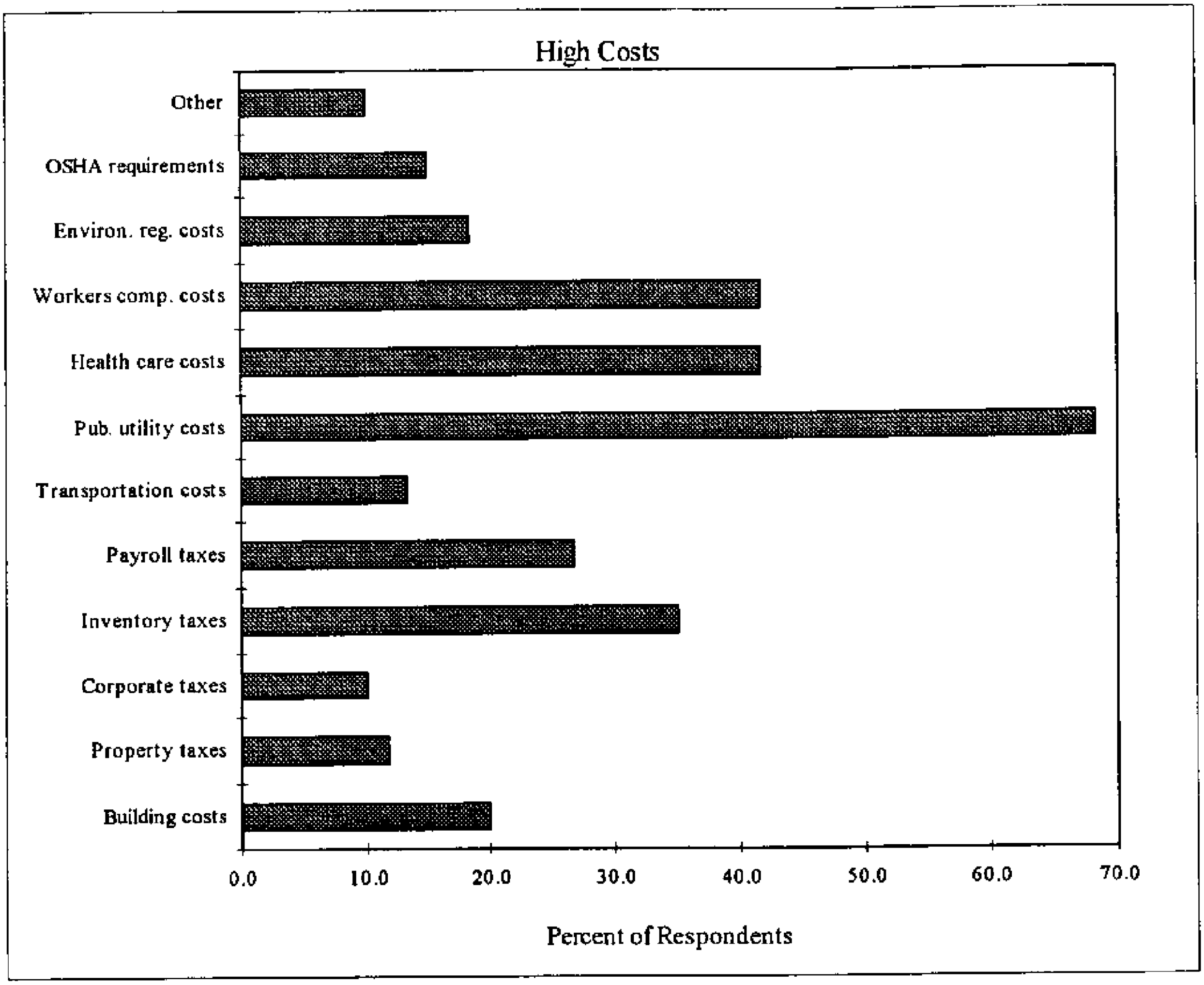

Figure 13. Cost of Doing Business in Lucas County.

The visited businesses rated the service base of the Toledo area very high. Fire protection, emergency medical services and access to higher education were all rated excellent or very good by 80 percent or more of the respondents (Figure 14). Another eight service or amenity categories were rated as excellent or very good by 70 to 79 percent of businesses. However, several service categories need to be further explored with the businesses. The four services receiving the highest percentage of very poor and poor ratings were street repairs, air service, primary and secondary schools, and quality labor force (Figure 15).

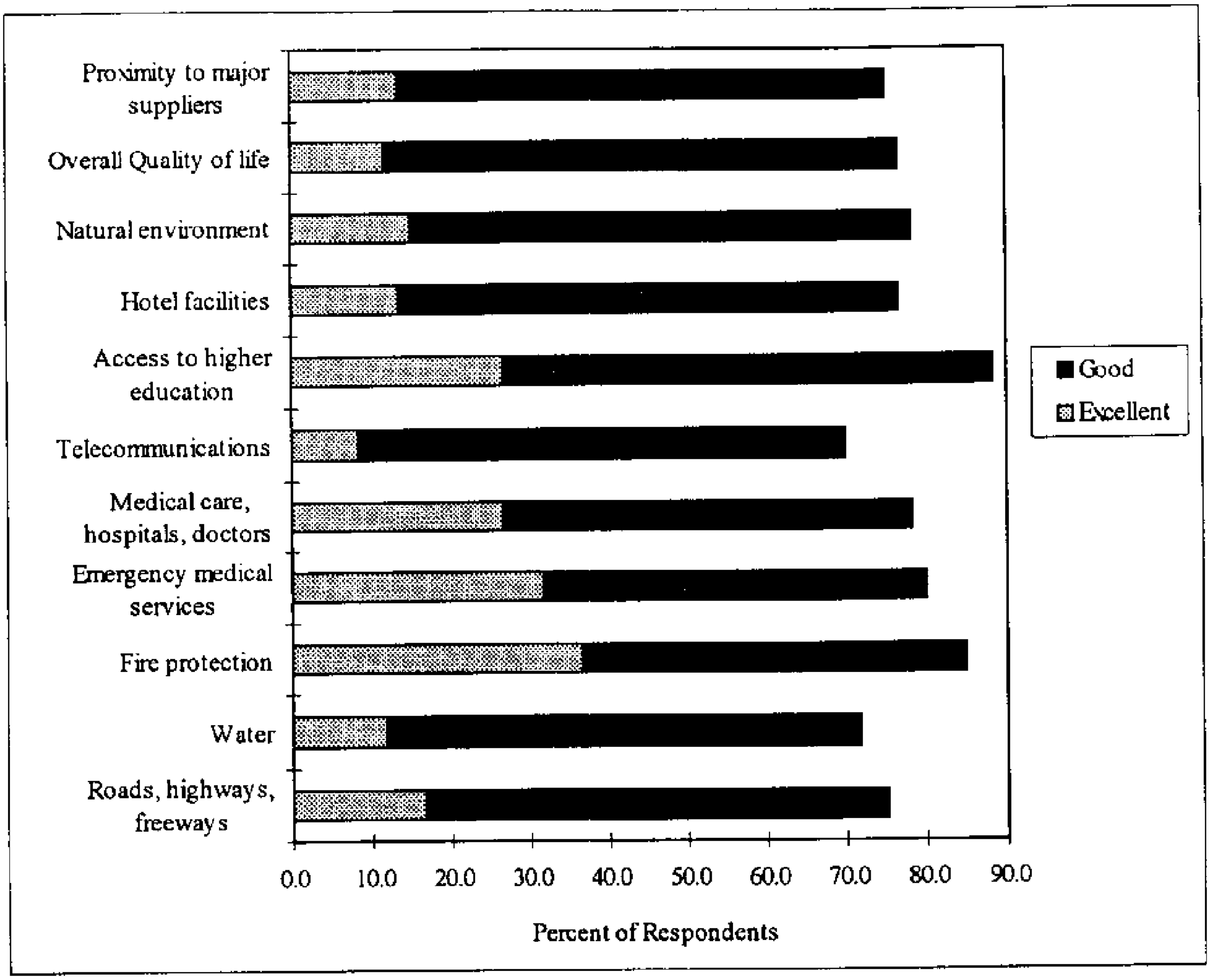

Figure 14. Services and Amenities in Lucas County.

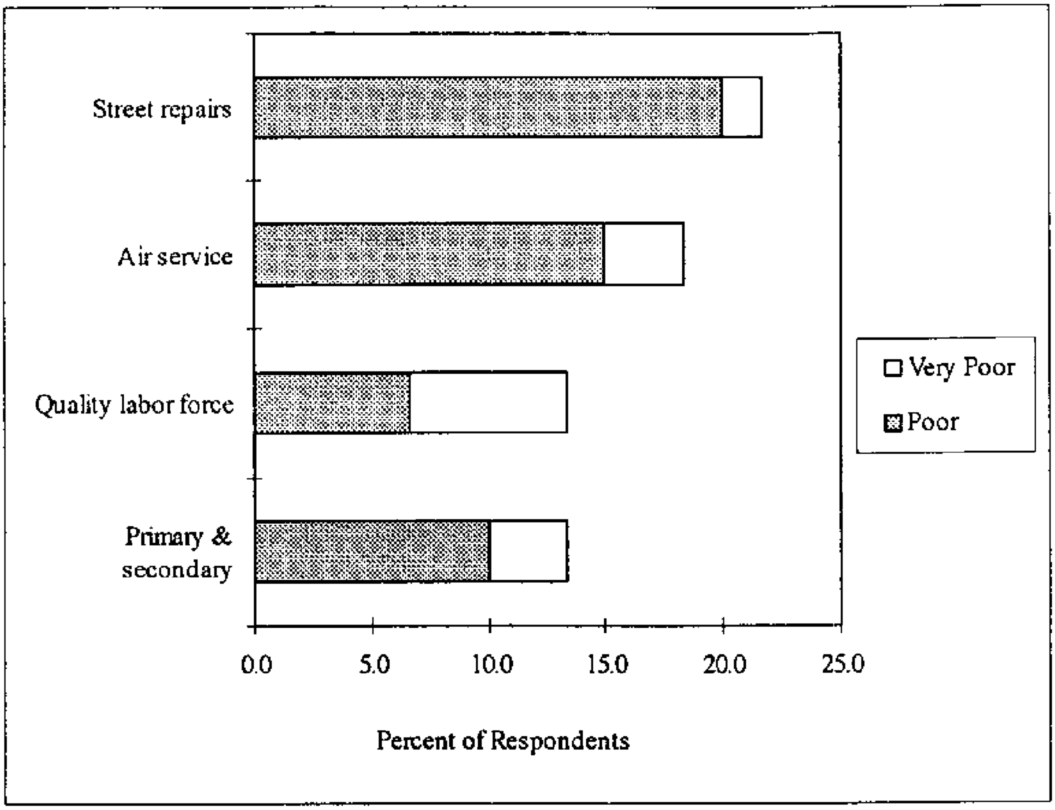

Figure 15. Services and Amenities with Low Ratings.

One-half of the businesses said their storefront or another part of their building requires improvements to attract customers (Appendix Q28). The highest ranking needed improvements were exteriors of buildings, cleanliness, front entrances and street lighting (Table 15).

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Window dressings	2	1	2	2	6	30
Exterior buildings	13	4	9	2	4	116
Front entrances	1	11	3	2	3	65
Rear entrances	1	2	1	2	0	20
Interior appearances	2	4	2	6	1	45
Signage	0	0	0	0	0	0
Cleanliness	6	5	7	6	4	87
Street lighting	4	4	5	5	2	63
Condition of sidewalks	2	2	4	2	1	35
Landscaping	3	7	2	2	9	62

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

Table 15. Needed Improvements for Business Area.

The most frequently mentioned merchandising improvements needed for business area were variety of merchandise, prices, advertising, and special promotions (Table 16). Congested streets, inadequate parking and vehicular access were the most named traffic issues (Table 17). More retail shopping, from general retail to specialty shops, was the most frequently mentioned need to improve the attractiveness of the business area (16 businesses), and food facilities, from fast food to expensive restaurants, the second most listed (8 businesses).

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Prices	8	6	5	6	2	93
Variety of merchandise	14	8	2	3	2	116
Management skills	4	1	9	3	4	61
Store displays	1	3	4	2	0	33
Store hours	4	5	5	5	1	66
Special promotions	4	7	5	3	6	75
Advertising	6	9	1	7	8	91

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

Table 16. Merchandising Improvements Needed For Business Area.

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Congested streets	13	10	6	0	1	124
Inadequate parking	14	4	2	2	4	100
Location of parking	2	12	1	6	3	76
Pedestrian access	4	4	4	5	2	60
Vehicular access	5	7	11	1	1	89
Bicycle access	3	2	0	4	3	34

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

Table 17. Transportation Needs for Business Area.

Security and crime were frequently mentioned issues in response to questions 34 and 35 of the questionnaire. Ten businesses listed crime as the biggest threat to their business while 14 listed crime as the biggest threat to the community. Increased security was listed by the largest number of businesses (4) as the single most specific thing local government could do to help the business expand or remain at its current site in question 34. Downtown decline was the second most frequently listed item in these questions with about four responses to each question; security and downtown decline are closely related.

Local Questions

Tourism was considered to be an economic impact generator by 50 of the 60 businesses visited (Appendix Q38); 10 of 13 downtown businesses considered tourism to be an economic impact generator. A downtown attraction was listed by 16 businesses as a type of attraction which would increase Toledo's tourism and convention business. Gambling was listed by nine businesses, (Appendix Q37); two of which are located downtown. A viable downtown shopping and activity center is an obvious major concern of the visited businesses.

Over two-thirds of the businesses expected that a regularly scheduled transportation link, a bus or trolley, connecting major points of interest within the Toledo area would increase area tourism (Table 18). Ten of the 13 downtown businesses had this same expectation. Based on this response, a regularly scheduled bus or trolley is an activity that businesses appear willing to support.

	Number	Percent
No effect	16	27.6
Slightly increase area tourism	20	34.5
Greatly increase area tourism	21	36.2
May decrease area tourism	1	1.7

Table 18. Effect of Transportation Link on Area Tourism.

Who do the visited businesses look to for leadership in the development of tourism in the Toledo area (Appendix Q39)? Twenty-seven businesses look to the Greater Toledo Convention and Visitors Bureau, 13 look to the Chamber of Commerce, and 3 to the Port Authority. Of these the Visitors Bureau and Chamber were jointly listed by four businesses while the Visitors Bureau and the Port Authority were jointly listed by two businesses. The Toledo Regional Growth Partnership is notably absent except through its linkages with the Chamber and the Port Authority.

Toledo Visitor Survey

In 1993, Ohio Sea Grant Extension and the Greater Toledo Convention and Visitors Bureau conducted a visitor customer survey of the Toledo area. During the survey period (May-October), 500 visitors were contacted to participate the program. There were 257 surveys returned in total representing about a 51 percent response rate. The survey asked questions concerning why visitors came to the Toledo area; what advertising was used; and what changes the local visitor businesses in this area could make to serve the visitors better. By collecting and analyzing this survey information, the local visitor businesses can better understand the market and make improvements to keep and attract more visitors. A summary of the survey results follows.

Characteristics of Toledo Area Visitors

Seventy-six percent of the visitors were married. An average household included 2.9 members, with a range of one to eight persons. The household median income was in the $40,001-$50,000 range. About 40 percent had incomes less than $40,000 while 37 percent had incomes over $50,000. The remainder did not respond.

About 44 percent of the respondents were 26 to 45 years of age. Thirty percent of the respondents were 46 to 64, while another 15 percent of the respondents were 65 years of age and older.

The majority of the respondents (42%) had obtained a high school diploma; four percent had less than a high school diploma. Sixteen percent of the respondents indicated they had an associate/technical degree while 23 percent had a bachelors degree and 13 percent had a master's degree or beyond.

Fifty-two percent of the visitors were from Ohio and another 27 percent were from Michigan. About 44 percent of Ohio visitors and 46 percent of Michigan visitors were from the adjacent counties (Wood, Fulton, Henry, Ottawa, Sandusky Counties of Ohio; Wayne and Monroe Counties of Michigan).

Visitor Expenditures

The 1993 average expenditure for the group which reported for themselves was $493, for the group which reported for their families was $811, and for the group which reported for their groups was $620. The average expenditure per group was $765 (Figure 16).

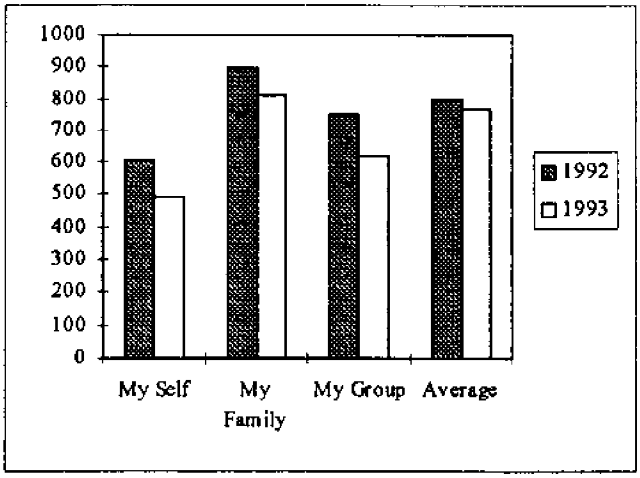

Figure 16. The Average Expenditure for Different Groups, 1993 Toledo Area Tourist.

Figure 16 also shows that the 1992 average expenditure for the group which reported for themselves was $608, for the group which reported for their families was $893, and for the group which reported for their groups was $750. The average expenditure per group was $795.

The visitors spent about 26 percent of their money on restaurants, 19 percent on lodging, 12 percent on clothing stores, 10 percent on entertainment, 7 percent on transportation, and 6 percent each on fees for attraction and groceries, respectively (Figure 17).

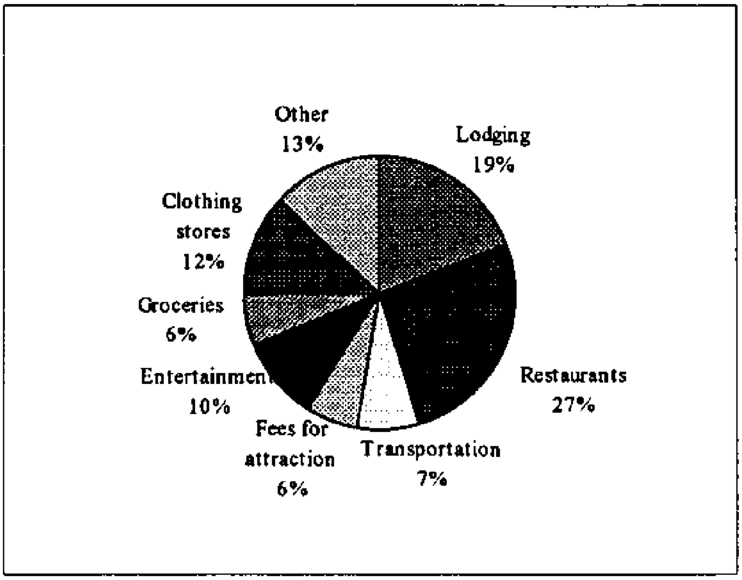

Figure 17. 1993 Toledo Area Visitors Expenditure Distribution.

Visitors Trips

Most of the Toledo visitors (60%) were with their spouse or family on the trip. Another 26 percent were with a group. About 39 percent of the visitors planned their trip less than one week before they came to the area. Nineteen percent planned less than one month and another 19 percent planned one to two months before they visited.

Eighty-seven percent of the visitors responded that this was not their first trip to the Toledo area and 63 percent of these visitors visited the area at least every year. Almost 20 percent of the Toledo area visitors came primarily to visit attractions and another 15 percent came to a festival and/or special event. Ten percent of the visitors came for a sport activity and another 10 percent came to a convention and/or tournament.

Hotel and/or motel was the major lodging facility used by 42 percent of the visitors. Friend and/or relative's home followed with 14 percent. However, 28 percent of the visitors reported that they did not stay overnight.

When asked about what best described their primary recreation area, 36 percent of the visitors checked the Toledo area, 21 percent checked other areas of Ohio, and another 32 percent checked areas outside of Ohio.

Eighty-eight percent of the visitors rated the prices of the goods and services as either very competitive or competitive. Less than one percent rated prices as very expensive. For the quality of the goods and service, 39 percent of the visitors rated quality as either excellent or above average. Fifty-five percent rated quality as average while less than one percent rated it as poor and no one rated quality as very poor.

Advertising Issues

Visitors primarily relied on previous experience and recommendations from friends when they were attracted to the Toledo area. Other than past experience and word-of-mouth referrals, newspapers and TV were the other two most important advertising mediums to bring the visitors to recreate in the Toledo area (Figure 18). Figure 18 also shows that the first-time Toledo area visitors most relied on word-of-mouth referrals, travel agents, visitor guides, brochures, visitors information centers, and TV.

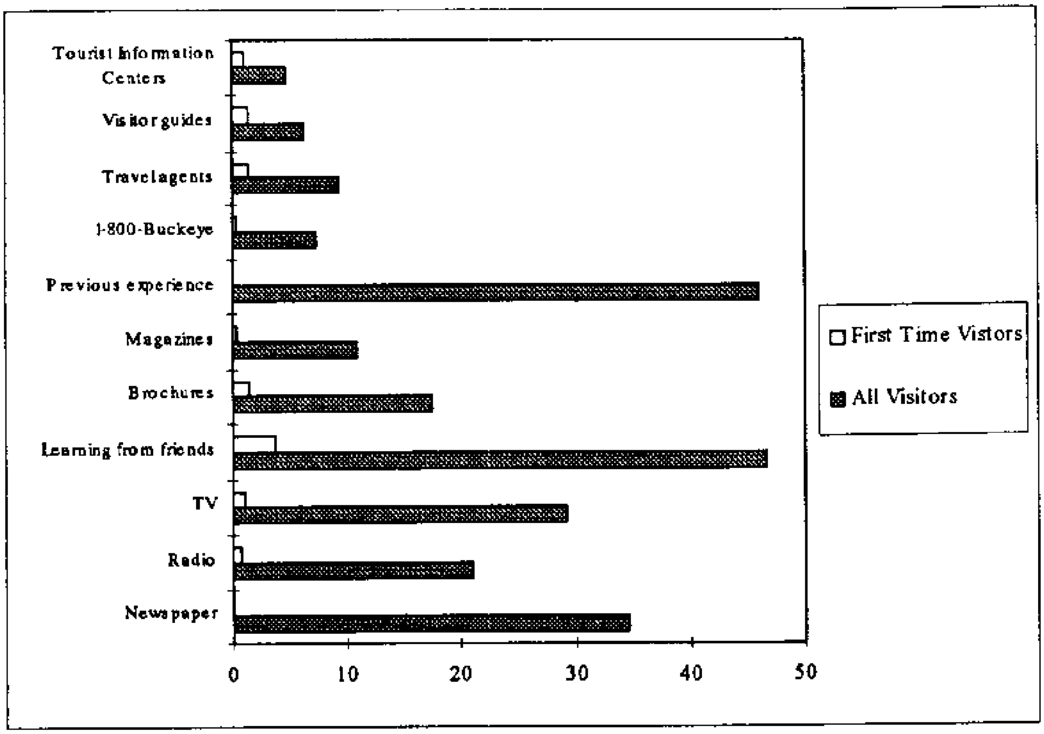

Figure 18. The Effect of Advertising Media On 1993 Toledo Area Visitors.

Improvement Tips from Visitors

The visitors were also asked to rank the three most important needs for improved visitor recreation in the Toledo area. Figure 19 shows that more tourist attractions and less traffic congestion were ranked as the two most important improvements. They were followed by more advertising, more places to eat, and better public facilities.

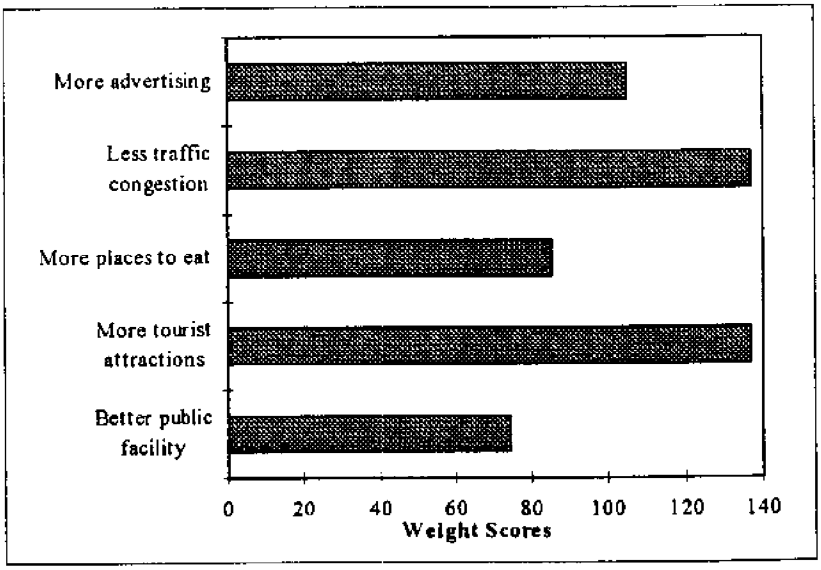

Figure 19. The Needed Improvements for Visitor Business, Toledo Area, 1993.

Implications for Marketing Strategies

The results of the Toledo area visitor customer survey suggest that most visitors come to the area year after year and they rely on their past experience in deciding whether to visit the Toledo area. The adjacent counties (i.e. Fulton, Henry, Ottawa, Sandusky, and Wood Counties in Ohio, Wayne and Monroe Counties in Michigan) are the primary market for the Toledo area visitor businesses. Newspaper, TV, and radio advertising are most used by the visitors and they plan their trips on a very short time horizon.

Lucas County Tourism R&E Action Plan

Following the completion of the R&E business visits, the OSU Extension R&E Staff provided the Lucas County R&E Task Force with an overview and summary of the data collected. The Task Force was then assisted in the development of the following R&E Action Plan.

Action Planning is an important part of the Ohio Business Retention and Expansion Program. Based on the findings of the R&E business visits, the purpose of the Action Plan is to prepare short-term and long-term action strategies that support community and economic development in Lucas County.

This Action Plan was formulated by the Task Force during a series of meetings focused on developing strategies to improve the business climate for tourism or visitor-related businesses. It is based on the aggregate results of sixty business surveys and 257 visitor surveys which were presented to the Task Force at their initial action planning meeting. The following needs and concerns, were identified by the Task Force during this process:

1. Market and improve the community image (both external and internal).
2. Provide information to businesses on where, how, etc. to obtain expansion assistance.
3. A coordinated plan for downtown Toledo emphasizing targeted attractions and businesses.
4. Network tourism business group within industry/communications with those outside industry.
5. Better understand and address concerns about crime.
6. Address pre-job and on-the-job training issues.
7. Communication with businesses having primary markets outside of adjacent counties could be worthwhile.
8. Communication of the R&E report to the public--both the positive and the negative--along with recommendations.
9. A comparison of businesses costs, especially those rated high (utilities).
10. Assistance (financial and technical) for service businesses including training, writing business plans, loan availability.

The Task Force then prioritized these business climate concerns and chose four to address in the Action Plan.

The Task Force chose these four issues as highest priority based on two criteria: 1) They are highly critical issues to the improvement of the visitor oriented business climate for the Toledo area and 2) they are issues where the Task Force in collaboration with other affected businesses and city officals can make a difference.

Objectives and actions steps were then formulated for the four most important concerns as determined by the Task Force. The objectives below are the long term outcomes desired and the specific actions are the more immediate steps to be undertaken.

This is not a comprehensive plan as it does not attempt to address every local business climate concern. Rather this plan is the result of an action planning process that prioritizes the identified issues and takes them a step further by putting them into action form.

Strengthen Marketing Plan

Background:
Businesses rated more advertising as one of the most needed improvements and visitors also rated advertising as one of the most needed tourism improvements.

The Greater Toledo Convention and Visitors Bureau (GTCVB) prepares an annual marketing plan; however, insufficient funding keeps the plan from being fully implemented. A comparison of budgets of other Ohio metropolitan Visitors Bureaus shows the GTCVB budget is the lowest of the five metro areas. One explanation for this is the Lucas County hotel and motel tax, normally used for marketing purposes, is dedicated to retiring the debt on SeaGate Convention Centre. Twenty-seven businesses look to the Greater Toledo Convention and Visitors Bureau, 13 look to the Chamber of Commerce, and 3 to the Port Authority. Of these the Visitors Bureau and Chamber were jointly listed by four businesses while the visitors bureau and the Port Authority were jointly listed by two businesses.

Objective One:
Develop mechanisms to assist the Greater Toledo Convention and Visitors Bureau (GTCVB) in implementing their marketing plan.

Task Force Members Responsible:
Rob Armstrong, Fred Harrington, Herb Hoehing, Kevin Lonseth and Carolyn Schermbeck.

Specific Actions:

1. Review the current GTCVB Marketing Plan and provide feedback to its Advisory Board.
2. Establish a liaison representative between the R&E Task Force and the GTCVB Advisory Board.
3. Develop a plan for the use and benefits of additional public and private financial support for the GTCVB Marketing Plan and clarify the sources and uses of the current bed tax and communicate the findings to the business community.

Better Information

Background:
Visitor-related businesses are not specifically serviced by any local economic development organization, although over one-half of the businesses were planning an expansion or renovation and 30 percent were considering opening another outlet for their business. All surveyed businesses were interested in finding out more about State of Ohio financial and technical assistance programs and other business programs, many of which are available on a local basis.

The Toledo Area Small Business Development Center and the Ohio State University Sea Grant Extension Office are currently assembling a small business service directory which will include a complete listing of agencies who provide assistance to small businesses.

Objective Two:
Develop methods to disseminate information regarding local and state business assistance programs to visitor and travel related businesses.

Task Force Members Responsible:
Mary Bielen, Linda Fayerweather, and Mike Lora.

Specific Actions:

1. Involve a GTCVB employee or appointee in the development of the Toledo area small business service directory project.
2. Provide the directory to GTCVB member businesses when completed.
3. Investigate ways to disseminate information on relevant state business assistance programs to visitor and travel- related businesses.

Downtown Is Important To Tourism

Background:
The potential contribution of the downtown to tourism is well recognized by area businesses. A downtown attraction was listed by a significant number of businesses as a type of attraction that would increase area tourism and convention business.

Over 80 percent of the businesses viewed tourism as an economic impact generator and over two-thirds of the businesses expected that a regularly scheduled transportation link, a bus or trolley, connecting major points of interest would increase area tourism.

Downtown decline, however, was listed as the second most specific threat to the well-being of area businesses and the community.

Objective Three:

Communicate the findings of the R&E Program, especially those regarding the downtown, to the City of Toledo Department of Development, Downtown ToledoVision, Inc., Lucas County, and downtown businesses.

Task Force Members Responsible:

Mary Bielen, Jack Jones, Judy Jones, Mike Lora, Norm Moll, Joe Moran, and Barb Shinevar

Specific Actions:

1. Develop a fact sheet that communicates the findings of the R&E Program, especially those regarding the downtown, and distribute to all concerned organizations and downtown businesses.
2. Present the findings of the R&E program, when possible, at meetings related to downtown development.

Business Network Needed

Background:

As a result of the R&E Program, the Task Force indirectly discovered that visitor-related businesses did not regularly communicate with one another. It was not clear if there were mechanisms in existence for these businesses to network with each other. More information is needed to be able to institute an effective means of accomplishing this objective.

There may be potential for more cooperative advertising arrangements among area businesses. About one-third of businesses reported sharing advertising expenses in the form of cooperative advertising. Another one-third said they were not sharing expenses, but about two-thirds of these would consider sharing advertising expenses.

Objective Four:

Develop a Toledo area regional business network to foster communication among visitor and travel related businesses.

Task Force Members Responsible:

Linda Fayerweather, Fred Harrington, Judy Jones, and Carolyn Schermbeck

Specific Actions:

1. Organize a meeting of visitor and travel related businesses to obtain input into possible networking needs, interests and structure.
2. Develop a visitor and travel business network plan based on input from the meeting.

3. Investigate additional cooperative advertising arrangements and other working relationships with area businesses, the Ohio Division of Travel and Tourism, and other Convention and Visitors Bureaus in the region, in coordination with the Greater Toledo Convention and Visitors Bureau.

Appendices

The following Appendices are included in this Lucas County Retention and Expansion Final Report:

Appendix A: Lucas County R&E Task Force
Appendix B: Lucas County R&E Volunteer Visitors
Appendix C: Lucas County R&E Businesses Visited
Appendix D: Lucas County R&E Business Survey and Aggregate Results

Appendix A

Lucas County R&E Task Force

Carolyn Schermbeck

Norman Moll

Fred J. Harrington

Jack Jones

Judy Jones

Rob Armstrong

Barbara Shinevar

Herbert Hoehing

Joseph Moran

Mike Lora

Mary Bielen

Kevin Lonseth

Linda Fayerweather

Appendix B

Lucas County R&E Volunteer Visitors

Pat Kenny
Beth Yingling
Bob Beach
Laura Wyrick
Tom Manahan
Chip Dennison
Ken Brandt
Kelly Shulte
John Whitmore
Larry Ohlman
Liza Syvert
Annetta Kennedy
John Pratt
Eileen Teall
Debbie Burman
Patricia Pecora
Rich Nachazel
Michelle Quilter
Diana Hartman
Julie Bolfa
Carol Ragozzino
Libby Marsh
Susan Podracky
Georgia Goldsmith
Jill Woodyard
Kelley Allred
Rob Greenlese
John Henry Fullen
Charlie Emmenecker
Debra Fruth
Dan Douglas
Jeannine Baibak
Ray Busick
James Caldwell

Appendix C

Lucas County R&E Businesses Visited

University of Toledo, Toledo
The Andersons, Maumee
The Lion Store, Toledo
Maumee Bay Resort and Conference Center, Oregon
St. Lukes Hospital, Maumee
Crowne Plaza Toledo, Toledo
Toledo Zoological Society, Toledo
Toledo Museum of Art, Toledo
Toledo Mud Hens Baseball Club, Toledo
Libbey Glass Factory Outlet, Toledo
Toledo Symphony Orchestra Association, Toledo
Harbor Light Cruise Lines, Inc., Toledo
Raceway Park, Inc., Toledo
Tony Packo's Cafe, Toledo
Toledo Area Regional Transit Authority, Toledo
Lucas County Recreation Center, Maumee
Mary's Enterprises Division-MCL Group, Toledo
Crow Executive Air, Inc., Millbury
Duke's Taxi, Toledo
Brenner Marina, Toledo
Pier 75, Toledo
Toledo Tours, Toledo
Marshall's Inc., Holland
Big & Small Lots, Toledo
Target Store, Toledo
Hills Department Store, Toledo
K-Mart Store #4166, Toledo
Value City Department Store, Toledo
Agency Rent-A-Car, Toledo
Buckeye Rent-A-Car, Maumee
National Car Rental, Swanton
Valleywood Golf Club, Swanton
Bluebird Passenger Train, Perrysburg
Wolcott House Museum Complex, Maumee
Talking Turtle Gift Shop, Maumee
Shawnee Princess, Toledo
Toledo Botanical Gardens, Toledo
B&B Bait and Beverage Cafe, Toledo
Breaktime Charters, Walbridge
Rosie's Family Restaurant, Toledo
Spaghetti Warehouse, Toledo
TGI Fridays, Toledo
Bill Knapp's Restaurant, Toledo
Carmel's Mexican Restaurant, Toledo
Dominic's Italian Restaurant, Toledo
Parmelee's American Restaurant & Bakery, Maumee
Four-E-Ranch Restaurant, Toledo
The Board Room, Toledo
Lee's Restaurant, Waterville
Cousino's Steak House, Oregon
Holiday Inn-French Quarter, Perrysburg
Econo Lodge, Toledo
Red Roof Inn, Maumee
Motel 6, Toledo
Radisson Hotel of Toledo, Toledo
Toledo Sports Arena, Toledo
Lighthouse Banquet Hall and Cafe, Toledo
SeaGate Convention Center, Toledo
Nazareth Hall, Grand Rapids
Theos Tavern & Greek Restaurant, Toledo

Appendix D

Lucas County R&E Business Survey and Aggregate Results

Section One - General Information

Volunteer Visitor: If possible, answer this question prior to visit.

1. In which of the following areas is your firm located? *Circle one choice.*

Location	Number	Percent
Downtown Toledo	13	21.7
Within Toledo, but not Downtown	24	40.0
Outside Toledo, but in Lucas County	18	30.0
Other	5	8.3
Total	60	100.0

2. What is your position with this business? . *Circle "a", "b", "c", or "d".*

Position	Number	Percent
Owner & manager	17	28.3
Manager	29	48.3
Supervisor	1	1.7
Employee	1	1.7
Other	12	20.0
Total	60	100.0

3. Which of the following best describes your business? . *Circle "a", "b", "c", or "d".*

Description	Number	Percent
Locally owned	41	70.7
Regional chain	4	6.9
National chain	10	17.2
International chain	3	5.2
Total	58	100.0

3.1. If your business is locally owned and operated, identify the legal form of your business. *Circle "a", "b", "c", "d", or "e".*

Location	Number	Percent
Sole proprietor	6	17.1
Corporation	23	65.7
Partnership	5	14.3
Cooperative	0	0.0
Other	7	20.0
Total	35	100.0

4. In what year was this business started in the current location?

1967 Year

Section Two - Employment Information

5. Please estimate the number of REGULAR (YEAR-ROUND) FULL-TIME AND PART-TIME employees by occupation. Also, please estimate the average hourly wage of each occupation.

Category	Full-Time	Part-Time	Average Hourly Wage
Clerical or administrative	429	123	8.16
Professional	412	187	15.94
Technical	503	211	8.33
Management	437	3	19.49
Sales	2457	1378	8.02
Maintenance or janitorial	244	97	7.97
Other	386	1210	3.08
Total	4868	3209	

6. Please estimate the number of SEASONAL FULL-TIME employees by occupation. ***Circle season (SP, SM, FL, WN) and estimate the average hourly wage).***

Category	Employees	Season of Employment Spring	Summer	Fall	Winter
Clerical or administrative	35	27	6	2	0
Professional	35	0	35	0	0
Technical	57	6	46	0	0
Management	15	3	12	0	0
Sales	439	390	9	40	0
Maintenance or janitorial	140	58	80	2	0
Other	216	15	26	0	5
Total	937	499	214	44	5

7. If current employees need training, what type of training is needed? ***Circle all that apply.***

Skill		Businesses	Employees
Basic math		13	229
Reading/writing		16	830
Communications		33	3899
Salesmanship		36	3481
Basic accounting		11	326
Managerial			
	Financial mgt.	17	607
	Record keeping	17	303
	Merchandising	15	2547
	Inventory control	20	3073
	Business planning	14	299
	Employee mgt.	22	2939
	Other mgt.	2	119
Computer Skills			
	Word-processing	20	1779
	Spreadsheets	19	1649
	Data base mgt.	18	1461
	Other computer	11	236
Other skills		6	71

8. Please indicate the residence of your employees. ***Percentages should sum to 100%.***

Place	Average Percent
Within Toledo	58.6
Outside Toledo, but within Lucas County	28.9
A county adjacent to Lucas County	10.8
Other areas besides a., b., or c.	1.8
Total	100.0

9. **If more than 50% of your employees reside outside of your business area please indicate why you think this is the case:**

____

____

Section Three - Customer Base

10. **Where do most of your customers live?** ***Rank the following four areas using a one (1) to indicate the area where the greatest number of your customers live and a four (4) to indicate where the fewest customers reside.***

Place	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Weight*
Within Toledo	31	12	4	7	175
Outside Toledo, within Lucas County	11	32	11	0	162
A county adjacent to Lucas County	2	9	34	8	111
Other areas besides a., b., or c.	12	3	4	35	100

* Weight is calculated by multiplying the number ranked 1 by 4, the number ranked 2 by 3, and so forth.

11. **Please rank your business seasons.** ***Rank from one (1) for your peak season to four (4) for non-peak season.***

Season	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Weight*
Spring	8	25	19	5	150
Summer	31	3	7	15	162
Fall	15	19	20	2	159
Winter	12	8	5	30	112

* Weight is calculated by multiplying the number ranked 1 by 4, the number ranked 2 by 3, and so forth.

12. Please rank your business days. ***Rank from one (1) for your busiest day to seven (7) for least busiest day on the line under the day of the week.***

Day	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Number Ranked 6	Number Ranked 7	Weight[a]
Sunday	5	10	11	5	2	4	21	205
Monday	9	1	4	9	5	7	21	175
Tuesday	3	4	6	7	17	15	4	188
Wednesday	1	5	8	12	17	10	3	199
Thursday	2	0	16	19	4	11	5	209
Friday	19	18	9	4	6	1	0	322
Saturday	25	19	4	1	2	5	1	330

[a] Weight is calculated by multiplying the number ranked 1 by 7, the number ranked 2 by 6, and so forth.

13. Please rank your business hours. ***Rank from one (1) for your busiest period to five (5) for least busiest period.***

Time of Day	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Morning	14	6	6	11	13	257
Lunch	9	20	17	5	2	238
Afternoon	11	13	18	12	1	306
Evening	21	14	6	10	2	301
Night	2	2	6	9	30	174

[a] Weight is calculated by multiplying the number ranked 1 by 5, the number ranked 2 by 4, and so forth.

14. Please indicate how the following business factors have or have not changed over the last three years. *Circle "a", "b", or "c" for each row.*

	Declined		Increased		Stayed the Same	
Factor	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Number of customers	20	33.9	37	62.7	2	3.4
Sales (dollars)	11	19.0	41	70.7	6	10.3
Profit	16	30.2	30	56.6	7	13.2
Number of Competitors	2	3.4	37	63.8	19	32.8

Section Four - Firm Characteristic

15. What are the major products or services sold by your business? *Name up to four in order of importance.*

1.____________________ 3.____________________

2.____________________ 4.____________________

16. Using the following list of types of advertising, please RANK FIVE that are:

A. Those types of advertising which you <u>have used</u> most often over the past year (Ranked Use).

B. Those types of advertising that you may be <u>interested in learning more about</u> (Ranked Interest).

Type	Used[a]	Interest[a]
Yellow pages	102	35
Daily newspapers	122	23
Weekly newspaper	61	18
Weekly shopper paper	9	34
Radio	105	27
TV	69	46
Billboards	40	28
Direct mail advertising	76	33
Visitor's guides	53	39
Magazines	38	12
Brochures	64	13
Group Advertising	11	35
Other	0	0

[a] Weighted score, type ranked 1 multiplied by 5, ranked 2 multiplied by 4, etc.

17. Do you share expenses for any of the following advertising methods with other businesses? If "no", would you consider sharing such advertising expenses? ***<u>Circle "a", "b", or "c" for each line.</u>***

Expense *(Number of Businesses)*	Yes	No	No, Would Consider
Cooperative Advertising	21	19	14
Cooperative Coupons	18	23	14
Area Promotions	19	16	19

18. Do you own or lease sufficient property to renovate or expand your business? ***Circle "a" or "b".***

	Number	Percent
No	21	35.0
Yes	38	63.3
NR	1	1.7

19. Are you considering renovating or expanding your building or facilities?

	Number	Percent
No	27	45.0
Yes	31	51.7
NR	2	3.3

Constraint	Number	Percent
Need financial assistance	10	37.0
Need physical planning assistance	1	3.7
Insufficient space	13	48.1
Other	3	11.1

[a] Respondents may have chosen more than one response.

20. Are you currently considering opening another outlet for your business?

	Number	Percent
No	39	65.0
Yes	18	30.0
NR	3	5.0

Q20.1. When Considering Opening.

When	Number	Percent
Within six months	3	16.7
Within one year	2	11.1
Between one and three years	11	61.1
More than three years	2	11.1
No Response	0	0.0

Q20.2. Where Considering Opening.

Location	Number	Percent
Within current business area	7	38.9
Different area in county	5	27.8
Elsewhere in Ohio	4	22.2
Outside Ohio	1	5.6
Outside U.S.A.	0	0.0
Undecided	1	5.6
No Response	0	0.0

21. Are you planning to move this business?

	Number	Percent
No	57	95.0
Yes	2	3.3
NR	1	1.7

Q21.1. When Considering Moving.

When	Number	Percent
Within six months	0	0.0
Within one year	1	50.0
Between one and three years	0	0.0
More than three years	0	0.0
No Response	1	50.0

Q21.2. Where Considering Opening.

Location	Number	Percent
Within current business area	0	0.0
Different area in county	1	50.0
Elsewhere in Ohio	0	0.0
Outside Ohio	1	50.0
Outside U.S.A.	0	0.0
Undecided	0	0.0
No Response	0	0.0

22. Are you planning to permanently close or sell your business?

Q22. Planning to Permanently Close or Sell.

	Number	Percent
No	56	93.3
Yes	3	5.0
NR	1	1.7

Q22.a. Closing or Selling.

	Number	Percent
Closing	1	33.3
Selling	2	66.7
NR	0	0.0

Q22.1. When Closing or Selling.

When	Number	Percent
Within six months	1	33.3
Within one year	0	0.0
Between one and three years	1	33.3
More than three years	0	0.0
No Response	1	33.3

23. Which of the following business programs available from the state of Ohio have you used in the last three years or are interested in learning more about? *Circle "a" or "b" for each row.*

Program	Have Used	Percent Have Used[a]	Would Like to Learn About	Percent Would Like to Learn About[a]
Job Creation Tax Credit	7	11.7	15	25.0
Export Ohio	0	0.0	8	13.3
Export Tax Credit	0	0.0	7	11.7
School-to-Work Forums	3	5.0	16	26.7
Minority Surety Bond	0	0.0	10	16.7
Mini-Loan	0	0.0	13	21.7
Minority Direct Loan	0	0.0	11	18.3
SBA 504 Loan	1	1.7	10	16.7
Community Reinvestment Areas	0	0.0	13	21.7
Enterprise Zone	0	0.0	12	20.0
Enterprise Bond Fund	0	0.0	9	15.0
One-Stop Permit Center	0	0.0	11	18.3
Other	2	3.3	3	5.0

[a] Percent of survey sample. Therefore, percents do not sum to 100.

24. Which of the following business or community development programs available from Ohio State University Extension have you used in the last three years or are interested in learning more about? *Circle "a" or "b" for each row.*

Program	Have Used	Percent Have Used[a]	Would Like to Learn About	Percent Would Like to Learn About[a]
Customer Relations/Marketing	1	1.7	30	50.0
Business Image Seminar	1	1.7	21	35.0
Industrial Site Development Seminar	0	0.0	4	6.7
Organizing for Econ. Dev. Seminar	0	0.0	8	13.3
Small Business Finance	1	1.7	18	30.0

[a] Percent of survey sample. Therefore, percents do not sum to 100.

25. Which of the following OTHER business *program areas* have you received assistance for in the last three years or are interested in learning more about? If you have had assistance in an area, please indicate from whom you got assistance. ***Circle "a" or "b" for each row.***

Program	Have Used	Percent Have Used*	Would Like to Learn About	Percent Would Like to Learn About*
Employee training	17	28.3	9	15.0
Environmental regulations	8	13.3	6	10.0
Other regulations	3	5.0	8	13.3
Health care insurance	14	23.3	6	10.0
Other insurance, liability, etc.	9	15.0	7	11.7
Employee safety	12	20.0	7	11.7
Workers compensation	14	23.3	4	6.7
Small Business Admin. Progs.	0	0.0	9	15.0
Grants for bus. or communities	3	5.0	11	18.3
Building rehabilitation, historic pres.	6	10.0	6	10.0
Tax Planning or assistance	4	6.7	4	6.7
Loan application and preparation	3	5.0	4	6.7
Minority business program	0	0.0	5	8.3
Writing a business plan	3	5.0	8	13.3
Quality management	7	11.7	13	21.7
Consumer surveying and mkt. analy.	7	11.7	13	21.7
Stress management	5	8.3	11	18.3
Other	2	3.3	2	3.3

* Percent of survey sample. Therefore, percents do not sum to 100.

Section Five - The Community.

26. Please indicate whether you believe the following costs of doing business in your area are high or low. For those in which you select "high" please indicate why. ***Circle "a", "b", or "c" for each row.***

Cost	Does Not Apply[a]	High[a]	Low[a]
Building costs	30.0	20.0	11.7
Property taxes	45.0	11.7	5.0
Corporate taxes	46.7	10.0	6.7
Inventory taxes	23.3	35.0	6.7
Payroll taxes	20.0	26.7	16.7
Transportation costs	40.0	13.3	15.0
Pub. utility costs	10.0	68.3	3.3
Health care costs	21.7	41.7	6.7
Workers comp. costs	15.0	41.7	10.0
Environ. reg. costs	40.0	18.3	5.0
OSHA requirements	38.3	15.0	6.7
Other	3.3	10.0	1.7

[a] Percent of Sample.

27. **From your perspective as a business person, please rate the following services or amenities in your area.** ***Circle "a", "b", "c", "d", "e", or "f" for each row.***

Service or Amenity	Excellent[a]	Good[a]	Fair[a]	Poor[a]	Very Poor[a]	Don't Know[a]
Roads, highways, freeways	16.7	58.3	13.3	10.0	0.0	0.0
Street and sidewalk cleaning	8.3	55.0	15.0	8.3	0.0	11.7
Snow and ice removal	8.3	53.3	21.7	1.7	1.7	11.7
Street repairs	1.7	31.7	40.0	20.0	1.7	3.3
Sewers	1.7	56.7	16.7	3.3	0.0	16.7
Water	11.7	60.0	13.3	3.3	0.0	8.3
Police protection	26.7	40.0	18.3	5.0	5.0	1.7
Fire protection	36.7	48.3	6.7	0.0	0.0	5.0
Solid waste disposal	6.7	53.3	18.3	1.7	1.7	15.0
Emergency medical services	31.7	48.3	6.7	0.0	1.7	8.3
Medical care, hospitals, doctors	26.7	51.7	10.0	3.3	1.7	1.7
Electrical services	10.0	58.3	16.7	6.7	0.0	5.0
Telecommunications	8.3	61.7	20.0	1.7	1.7	1.7
Natural gas service	13.3	61.7	10.0	1.7	0.0	10.0
Primary & secondary schools	13.3	40.0	21.7	10.0	3.3	8.3
Tech. & vocational education	8.3	53.3	8.3	1.7	0.0	25.0
Access to higher education	26.7	61.7	3.3	0.0	0.0	5.0
Rail service	3.3	15.0	10.0	4.2	2.5	13.3
Air service	6.7	41.7	23.3	15.0	3.3	6.7
Public transportation	10.0	48.3	18.3	6.7	1.7	10.0
Hotel facilities	13.3	63.3	3.3	6.7	0.0	8.3
Conference facilities	18.3	50.0	8.3	5.0	0.0	13.3
Housing opportunities	8.3	55.0	16.7	1.7	0.0	13.3
Recreation services	16.7	50.0	15.0	6.7	0.0	8.3
Natural environment	15.0	63.3	8.3	3.3	1.7	5.0
Quality labor force	8.3	40.0	31.7	6.7	6.7	1.7
Overall Quality of life	11.7	65.0	15.0	5.0	0.0	0.0
Proximity to major suppliers	13.3	61.7	6.7	3.3	0.0	11.7
Proximity to major markets	10.0	29.2	3.3	0.8	0.0	5.0

[a] Percent of Sample.

28. Do you think your storefront or another part of your BUILDING requires any improvements to attract customers?

	Number	Percent
No	24	40.0
Yes	30	50.0
NR	6	10.0

29. From your perspective as a business person, please rank the five APPEARANCE items which are the most needed improvements for your immediate BUSINESS AREA. *Rank from (1) for the most critical need, to (5).*

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Window dressings	2	1	2	2	6	30
Exterior buildings	13	4	9	2	4	116
Front entrances	1	11	3	2	3	65
Rear entrances	1	2	1	2	0	20
Interior appearances	2	4	2	6	1	45
Signage	0	0	0	0	0	0
Cleanliness	6	5	7	6	4	87
Street lighting	4	4	5	5	2	63
Condition of sidewalks	2	2	4	2	1	35
Landscaping	3	7	2	2	9	62

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

30. From your perspective as a business person, please rank the five <u>MERCHANDISING</u> items which are the most needed improvements for your immediate <u>BUSINESS AREA</u>. *<u>Rank from (1) for the most critical need, to (5).</u>*

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Prices	8	6	5	6	2	93
Variety of merchandise	14	8	2	3	2	116
Management skills	4	1	9	3	4	61
Store displays	1	3	4	2	0	33
Store hours	4	5	5	5	1	66
Special promotions	4	7	5	3	6	75
Advertising	6	9	1	7	8	91

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

31. From your perspective as a business person, please rank the five <u>TRAFFIC</u>-related items which are the most needed improvements for your immediate <u>BUSINESS AREA</u>. *<u>Rank from (1) for the most critical need, to (5).</u>*

Item	Number Ranked 1	Number Ranked 2	Number Ranked 3	Number Ranked 4	Number Ranked 5	Weight[a]
Congested streets	13	10	6	0	1	124
Inadequate parking	14	4	2	2	4	100
Location of parking	2	12	1	6	3	76
Pedestrian access	4	4	4	5	2	60
Vehicular access	5	7	11	1	1	89
Bicycle access	3	2	0	4	3	34

[a] Calculated by multiplying number ranked 1 by 5, number ranked 2 by 4, etc.

32. From your perspective as a business person, what are the three most important additional retail or service businesses needed to improve the ATTRACTIVENESS OF THE AREA IN WHICH YOU DO BUSINESS?

1. ____________________
2. ____________________
3. ____________________

33. What do you think would be the most desirable rate of business growth for your area in the next five years?

	Number	Percent
Rapid growth	9	15.5
Moderate growth	40	69.0
Slow growth	7	12.1
No growth	2	3.4
Not sure	0	0.0

34. What is the single most specific thing this community could do to help you expand or remain at your current site?

____

____

35. What is the single most specific "threat", if any, to the well being of your specific business and community?

Threat to Business ____________________

Threat to Community ____________________

36. What specific concerns (list up to four) would you like to see addressed? ***(These can include ones mentioned earlier or ones not yet addressed by the survey).***

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________

Local Questions :

37. Is there a type of attraction that Lucas County is currently lacking that would increase its tourism and convention business? If Yes please explain:

38. Do you consider tourism to be an economic impact generator

	Number	Percent
No	8	13.3
Yes	50	83.3
NR	2	3.3

39. Who in your community provides the leadership role for development of tourism?

40. Have you used any local business assistance programs available through your neighborhood, city, or county in the last three years? If so, what programs?

41. What would be the effect of a regularly scheduled transportation link such as a bus or trolley to connect major points of attraction such as the Riverfront, the Zoo, the Art Museum and shopping?

	Number	Percent
No effect	16	27.6
Slightly increase area tourism	20	34.5
Greatly increase area tourism	21	36.2
May decrease area tourism	1	1.7