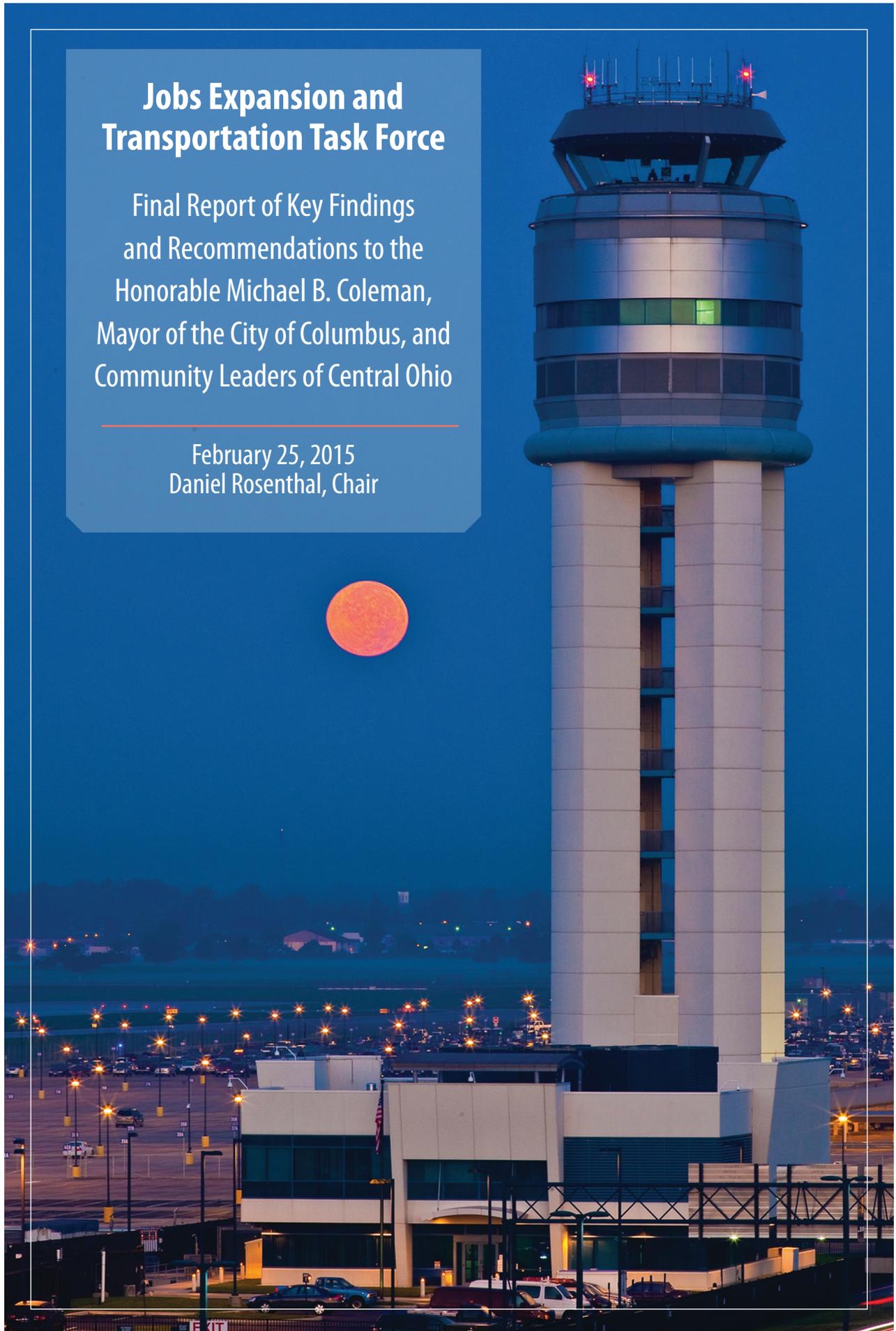


Jobs Expansion and Transportation Task Force

Final Report of Key Findings
and Recommendations to the
Honorable Michael B. Coleman,
Mayor of the City of Columbus, and
Community Leaders of Central Ohio

February 25, 2015
Daniel Rosenthal, Chair



JOBS EXPANSION AND TRANSPORTATION TASK FORCE

**FINAL REPORT OF
KEY FINDINGS AND RECOMMENDATIONS**

to

**The Honorable Michael B. Coleman,
Mayor of the City of Columbus**

and

Community Leaders of Central Ohio

**February 25, 2015
Daniel Rosenthal, Chair**

Acknowledgements

The Jobs Expansion and Transportation Task Force acknowledges the contributions of the citizens, businesses and organizations who cooperated with us in our proceedings as well as the contributions of information, staff, and resources of Columbus 2020, the Ohio State University, City of Columbus, City of Gahanna, City of Whitehall, Franklin County, Columbus Regional Airport Authority, Columbus-Franklin County Finance Authority, Central Ohio Transit Authority, and the Mid-Ohio Regional Planning Commission.

Letter of Transmittal

February 25, 2015

The Honorable Michael B. Coleman
Mayor
City of Columbus
90 West Broad Street
Columbus, OH 43215

Dear Mayor Coleman:

In the early days of commercial aviation, our City leaders made a bet on Columbus and built our original airport, proclaiming “Port Columbus, America’s Greatest Air Harbor.”

Sharing this great faith in the Columbus Spirit, Mayor Coleman, you contacted me a year ago to head a community effort to help make Port Columbus “Ohio’s Airport” and our transportation center.

Later that spring, you created and charged the Jobs Expansion and Transportation Task Force (JET) with exploring and recommending ways our Community could enhance direct air service from Port Columbus; make Port Columbus our region’s transportation center; and strengthen the economy of the Port Columbus area.

The JET Task Force quickly understood how these topics are interrelated. When we started the Task Force’s work, we represented the second-largest airport in the United States without non-stop service to the San Francisco Bay Area. We also represented one of the country’s largest cities that does not offer daily public transportation connecting our airport with our community. You recognized the direct ties between Port Columbus and economic development, and your mandate motivated our team’s work throughout the last year.

On behalf of the JET Task Force, I am pleased to present our Final Report of Key Findings and Recommendations. The report represents the hard work of our Task Force members, who broke into three working groups and met, researched, and discussed the matters associated with our important charge. They then reported their work to the full Task Force who completed this Final Report.

Simply put, I believe the Final Report says it is time again for us to make a bet on Columbus and Central Ohio. It is time for our Community to invest in Ohio’s Airport, in better air service, enhanced public transportation to connect the region and the growth and beautification of the airport district.

Of all the things that the Task Force learned during our work, perhaps the most staggering was the economic impact of nonstop air service. Your announcement last week that Southwest Airlines is adding nonstop Oakland service to the San Francisco Bay Area is just the start. Industry experts estimate that daily domestic air service from Columbus to the Bay Area can generate an annual economic impact for the region of over \$20 million. In looking at the

relationship between venture capital investment and direct air service to the Bay Area, on average, cities with direct air service to the Bay Area are exposed to \$110 million in venture capital funding per year versus \$11 million for cities without direct service. I believe that flights like this one are critical investments to ensure and enhance our community's future.

Indeed, air service goes hand in hand with economic development, with how airlines perceive a community. Your leadership has laid the foundation for attracting and improving air service, and now we must build off that success. That the State of Ohio does not have year round, daily nonstop service to any city in Europe is surprising, and I can think of no better place to attract that service than Ohio's Airport. But adding nonstop service to Europe does not happen overnight. Austin, Texas, recently added nonstop service to London after three years of the public and private sector working together successfully to recruit London and British Airways,-- proactively.

The Columbus Regional Airport Authority (CRAA) has done good work to build relationships with air carriers and renovate our airport and the district surrounding it. The CRAA also has done very impressive work in attracting international air cargo service to Rickenbacker. But the work required goes far beyond the CRAA and requires us to be proactive and aggressive as a community. We must think "outside the box," marshal community time and resources consistent with our Columbus2020 strategy, and bring some of that swagger that defines you into the airport conversation.

We thank you for the opportunity to serve our community and stand ready to work with you to fulfill the vision laid out in the following report.

Sincerely,



Daniel Rosenthal
Chair,
Jobs Expansion and Transportation Task Force

cc: The Honorable Andrew Ginther, President of Columbus City Council;
The Honorable Members of Columbus City Council;
The Honorable Marilyn Brown, President of the Franklin County Commission;
The Honorable Paula Brooks, Franklin County Commissioner;
The Honorable John O'Grady, Franklin County Commissioner;
The Honorable Becky Stinchcomb, Mayor of the City of Gahanna;
The Honorable Kim Maggard, Mayor of the City of Whitehall;
The Honorable Susan Tomasky, Chair of the Columbus Regional Airport Authority;
The Honorable Dawn Tyler Lee, Chair of the Central Ohio Transit Authority;
The Honorable Eric Phillips, Chair of the Mid-Ohio Regional Planning Commission;
President Michael Drake, The Ohio State University;
President David Harrison, Columbus State University;
Alex Fischer, President and Chief Executive Officer of the Columbus Partnership;
Kenny McDonald, Chief Economic Officer of Columbus 2020; and
Members of the Jobs Expansion and Transportation Task Force.

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Introduction

Jobs Expansion and Transportation (JET) Task Force

Port Columbus International Airport (Port Columbus) has been regarded as a critical economic engine for the region since its inception. Beginning in 1928, in the very early days of commercial aviation, city leaders campaigned for a strategically placed airfield to serve the citizens of Ohio. Incredible marketing techniques for the time convinced constituents to fund the new airport declared to be Port Columbus, America's Greatest Air Harbor. Civic leaders asserted that a paved runway is the starting point to anywhere and a safe haven for anyone.

Today, Port Columbus' economic impact is approaching \$4 Billion, annually, and the airport-related employment totals over 33,000 employees. With 150 daily flights, new direct flights to key markets, growing total passenger counts and its central location, Port Columbus not only serves the needs of our Community, but continues to emerge as Ohio's Airport of choice.

To build upon this important Community asset, Mayor Michael B. Coleman, in his 2014 State of the City Address, called for the creation of the Jobs, Expansion, and Transportation (JET) Task Force.

The Mayor named Daniel Rosenthal, President of Milestone Aviation Group, as Chair of the Task Force. In April, the Mayor appointed the full Task Force, comprised of business, development, transportation and neighborhood leaders. The JET Task Force members are: Dan Rosenthal, Milestone Aviation Group, Task Force Chair; Ted Adams, L Brands; Elizabeth Blount McCormick, Uniglobe Travel Designers; Kacey Brankamp, Create Columbus Commission; Jean Carter Ryan, Columbus-Franklin County Finance Authority; Geoffrey Chatas, Ohio State University; Michael Dalby, Greater Columbus Chamber of Commerce; Michael Johnson, East Columbus Civic Association; Stephen Lyons, Columbus Partnership; Jolene Molitoris, US Railcar; William Murdock, Mid-Ohio Regional Planning Commission; Mark Patton, JobsOhio; Anthony Precourt, Columbus Crew; and Jonathan Ramsden, of Abercrombie & Fitch.

Mayor Coleman charged the Task Force with developing recommendations on how to enhance direct flight service from Port Columbus and to strengthen our airport area as an economic hub and regional transportation center.

The Task Force organized into three working groups to conduct its business. The Air Services working group was chaired by Geoff Chatas, the Regional Transportation working group was chaired by William Murdock, and the Economic Development working group was chaired by Jean Carter Ryan. These working groups met regularly to develop findings and recommendations to inform the Task Force report. The full Task Force met on six occasions to examine pertinent matters, receive working group updates, and advance its charge.

The Task Force completed its work in February and its key findings and recommendations follow.

Executive Summary Of Key Recommendations

The JET Task Force made the following key recommendations:

1. ENHANCING DIRECT AIR SERVICE:

The Community must compete for and invest in new direct flight service in key markets on the West Coast and in Europe.

- Approach direct air services like other job centers and economic development targets;
- Identify markets best positioned for new service based upon travel demand projections;
- Understand the economic impact that air service to a new market provides our community;
- Align key air service users and marketing efforts to leverage demand for new service;
- Partner with public and private sectors to develop direct air service incentives.

2. ADVANCING PORT COLUMBUS AS OUR REGIONAL TRANSPORTATION CENTER:

The Community must pursue more transportation alternatives for the Port Columbus Area, including a Downtown rail connection and an airport area multi-modal transportation center.

- Support COTA's effort to provide bus service by 2016 from Downtown to the airport;
- Inform current and long term planning efforts of COTA, City of Columbus, and MORPC;
- Advance business case for Downtown rail service and airport multimodal transportation center;
- Pursue state legislation to create new innovative financing options for new transit services;
- Position these projects for state and federal funding and local public-private partnerships.

3. PROMOTING ECONOMIC DEVELOPMENT:

The Community must commit to strategic investments, programs and policies to strengthen the Port Columbus area.

- Create an airport area district focused on development, master planning, and job creation;
- Establish a marketing plan to promote the area and available sites, and target growth industries;
- Collaborate on business retention, workforce development and positioning area defense facilities;
- Promote investment in roadway, rail, and public transit infrastructure;
- Improve the area's appearance with enhanced development standards and code enforcement.

4. SUSTAINING THESE EFFORTS OVER TIME:

The Community must forge public-private partnerships to promote Task Force Recommendations.

- Establish an Air Services Committee to advise on air service priorities, policies and incentives;
- Assign or create an entity to promote economic development and transportation initiatives.

Key Findings And Recommendations

The JET Task Force made findings and recommendations to the Community on how to:

- (1) Enhance direct flight service at Port Columbus;
- (2) Promote economic development in the airport area; and
- (3) Advance Port Columbus as our regional multimodal transportation center.

To conduct its work, the Task Force organized three working groups: Air Services; Regional Transportation and Economic Development. These working groups conducted independent research and analysis, engaging community and business leaders from Central Ohio and throughout the country. Each of these working groups conducted its work, held several meetings, and developed reports of findings and recommendations to the full Task Force.

The JET Task Force reviewed and discussed these working group reports and adopted a Final Report of Key Findings and Recommendations. The Task Force stands ready to work with community leaders to advance these recommendations.

Air Services

FINDINGS: Air Service is going through a radical revolution, driving fierce competition to maintain and expand service to communities across America.

Direct air service strengthens our economy by connecting our citizens, businesses and institutions to markets across the nation and around the world.

New air service development is economic development that supports the work of the regional growth strategy of Columbus 2020.

Industry consolidation has made air service expansion difficult. Over the past 14 years, our nation's airlines have consolidated from 10 major carriers to four. These surviving four carriers now capture nearly 90% of the domestic air market. Port Columbus is well served by all four carriers.

Airlines have reduced the number of domestic flights in an effort to manage capacity in a strategy known as capacity discipline. From 2007-2012, these practices have resulted in cuts of 1.4 million domestic flights and the elimination of nearly 100 million domestic seats.

Medium-sized and smaller airports have felt the brunt of capacity cuts through airline consolidation and the closure of duplicate hubs. Columbus has suffered some air service setbacks – but not to the extent most airports have. In recent studies, Port Columbus ranks well compared to its peer airports both in increased capacity and the quality of its connections to the global air transportation network.

Businesses, institutions and the traveling public understand the benefits of direct air service- convenience, time, and access to markets- but our Community now better understands the significant annual economic impact of direct air service, driven by its facilitation of commerce.

Industry experts estimate that daily domestic air service to the San Francisco Bay Area from Columbus can generate an annual economic impact for the region of more than \$20 million. Even more impressive, daily international air service between the region and Europe could generate a \$50 million annual economic impact (per market).

Air service to key markets also may attract additional investment to a community. Business engagement with high technology companies in the San Francisco Bay Area drives a lot of venture capital investment. In looking at the relationship between venture capital investment and direct air service to the Bay Area, on average, cities with direct air service to the San Francisco Bay Area are exposed to \$110 million in venture capital funding per year versus \$11 million for cities without direct service.

With air service industry consolidation and the marked economic impact of direct air service, airports are pressed to first retain service, then work to expand and enhance service. Communities across America, led by state and local government, businesses, institutions, economic development groups and convention and visitor bureaus are playing an increasingly important role in supporting airport efforts to improve service.

In this environment, our Community cannot take our current position with air services for granted. For our future economic growth, it is critical for us to approach air services as an economic driver, like the logistics, technology, retail, financial services sectors, and engage our Community in understanding and investing in air service like we do these other important industries.

RECOMMENDATION: The Community must compete for and invest in new direct flight service in key markets on the West Coast and in Europe.

The Task Force recommends:

- (1) Advancing new direct air services as an economic driver that attracts new business activity, like other critical sectors, e.g., technology, finance, logistics, automotive and retail, due to its economic impact to our community and bring appropriate attention to advancing service in this competitive environment;
- (2) Targeting markets best positioned for new direct flight service based upon current demand and future projections in conjunction with Columbus 2020;
- (3) Understanding the overall economic impact direct air service to a new market would provide our community;
- (4) Aligning key business, institutional and community marketing and convention recruiting efforts to leverage demand for new direct air service;
- (5) Partnering with state and local governments and the business community to develop performance based economic incentives to help secure new direct air service and to attract more air maintenance and air service-related activities at Port Columbus to further position our Community for direct flights.

Transportation

FINDINGS: National and local demographic studies and transportation planning work support providing more transportation choices for service between the Port Columbus area and the downtown and other jobs centers and attractions.

Some communities have brought a variety of transportation modes and providers together into multimodal transportation centers at or near airports to serve workers and visitors.

The Insight2050 project executed by MORPC, Columbus2020, and Urban Land Institute-Columbus indicates long-term demographic shifts and market changes with implications for the region's transportation infrastructure. Key findings show continued strong population growth, particularly among the senior and young adult segments. This growth has important implications on both the demands and nature of future transportation investment decisions.

Connectivity drives economic opportunity. We examined the importance of more robust options for transportation and more connections between modes and between employment centers.

COTA's community planning work demonstrated the need for more public transit service to and around the Port Columbus area, including direct service to Downtown.

Investigation showed that generally, airport to downtown rail connection is typically part of a larger rail system that connects the airport to key employment centers within the region as well as the downtown.

The construction of the first line in a commuter or light rail system is generally the most expensive one, due to start-up costs associated with the construction of a maintenance yard and other initial expenses.

Our Community is currently conducting due diligence on high speed passenger rail service from Columbus to Chicago. It's important that any further work on commuter and light rail service take this project into consideration.

It is important to gain community and financial support from private sector stakeholders, because many successful regional transportation centers across the country required ongoing public-private leadership and innovative partnerships.

RECOMMENDATION: *The Community must pursue more transportation alternatives for the Port Columbus Area, including a rail connection to Downtown and an airport area multi-modal transportation center.*

The Task Force recommends:

- (1) Supporting COTA's effort to provide bus service by 2016 from downtown to the airport, as addressed in the Transit System Review;
- (2) Recommending our public partners take into consideration these JET Task Force findings into their current planning efforts like COTA's Next Generation Plan and the City's and MORPC's respective multimodal thoroughfare plans and the Community's exploration of high speed rail from Columbus to Chicago;
- (3) Advancing the business case for Downtown rail service and an airport multimodal center, by building upon the work in the Loop Road Supplemental Study. This study is exploring two potential fixed rail corridors from Downtown to the airport area as well as the siting of a multimodal transportation center at or near the airport;
- (4) Pursuing state legislation to provide innovative financing options for these new transit services and the transportation center;
- (5) Advancing these projects in a manner that positions them for state and federal funding and local public-private partnerships.

Economic Development

FINDINGS: The Port Columbus area is an important and diverse jobs center and economic engine in our Community.

The Port Columbus area contains over 1,200 businesses, employing more than 19,000 employees in the area. Two of the largest employers in the area are the Defense Supply Center (DSCC) with 8,000 employees and NetJets with 1,300 employees.

In addition to being a major employer, Port Columbus and its air service activities have a significant economic impact on the region's economy. In 2011, the Columbus Regional Airport Authority (CRAA) estimated that Port Columbus, through direct and multiplier outputs, generates over 33,000 jobs, \$1.1 billion in annual payroll and \$3.7 billion in annual economic output.

New developments in this area include Flight Safety with \$113 million in new investment and 155 new and retained jobs. The new Airside Business Park, is a \$22 million development. Airside also announced a new tenant, Homage, with \$1.6 million in new investment and 70 new and retained jobs.

The Port Columbus area falls within several jurisdictions and requires both multijurisdictional and public-private sector collaboration to address important matters.

RECOMMENDATION: The Community must commit to strategic investments, programs, and policies to strengthen the Port Columbus area.

The Task Force recommends:

- (1) Create a development district focused on economic development, master planning and job creation in the area around Port Columbus;
- (2) Establishing a marketing plan, with public and private sector stakeholders to promote the area and available sites and target specific growth industries for recruitment and work force development efforts;
- (3) Collaborating on business retention efforts to ensure we are engaging employers on work-force and infrastructure needs and organizing for Community initiatives, such as positioning DSCC for future success.
- (4) Promoting investment in roadway, rail, and public transit infrastructure to move people and freight to and from the Port Columbus area;
- (5) Improving the appearance and safety of the area through enhanced development standards and code enforcement efforts.

Sustaining These Efforts Over Time

The issues and initiatives identified by the Task Force are important and complex. Addressing them will require ongoing Community leadership, goal setting and resources. As the Task Force working groups examined successful efforts across the country they found that sustained community engagement was an important element of success.

Community leadership took shape in different forms, like development districts, transportation authorities and civic boards. The forms of leadership may have varied, but they all appreciated the long term nature of these initiatives and the importance of public and private sector partnership.

Fortunately, our Community has an excellent track record of bringing the public and private sector together to examine challenges, identify solutions, and determine the best ways to sustain leadership on community efforts. Examples include Columbus 2020, the Community Shelter Board and the Downtown Development Corporation.

RECOMMENDATION: The Community must forge public-private partnerships to promote Task Force Recommendations.

The Task Force recommends:

- (1) Establishing an Air Services Committee of businesses, institutions and local government to partner and advise on air service market priorities, establish policies, determine methods to provide community incentives for direct air service; and oversee implementation of community marketing efforts of any flight resulting from such incentives;
- (2) Assigning or creating an entity with the charge of promoting economic development and transportation initiatives and partnerships set forth in the Task Force recommendations.

Although, the Task Force does not dictate the form and powers of these partnerships, it believes any entity tasked with this work should:

- (1) Possess the power to set goals, develop strategy and advance Task Force recommendations;
- (2) Consist of, or be informed by, public and private sector leaders representing the communities in the area;
- (3) Have a clear charge and ability to direct resources to meet community goals; and
- (4) Report progress and challenges to the Community on a regular basis.

The JET Task Force members stand ready to assist the Community in pursuing all of these recommendations.

Air Services Working Group Report



I. Executive Summary

Introduction

In April 2014, Mayor Michael B. Coleman appointed the Jobs, Expansion and Transportation (JET) Task Force to enhance and leverage the Port Columbus airport as an economic hub and the center of transportation for the region. The JET Task Force is comprised of three working groups: Air Services; Economic Development and Regional Transportation. This report summarizes the work of the air services working group.

The air services working group's charge was to consider how best to identify and prioritize top air service needs of the community; expand awareness of and support for air service development efforts; and develop tools and strategies to attract targeted airlines to meet the identified air service needs.

To meet this charge, the working group worked with local businesses, State and Local governments, the Columbus Regional Airport Authority and its air services consultant InterVISTAS, to understand the current environment and to determine how best to:

- Add new domestic air service destinations
- Add new international air service destinations
- Enhance service to existing air service destinations

Key Findings

- Industry consolidation makes air service expansion difficult. Over the past 14 years, domestic air service carriers have consolidated from 10 major carriers to 4 and these carriers capture nearly 90% of market.
- Unlike airports with service dominated by one carrier, Port Columbus' market share is balanced among these four remaining carriers;
- Airlines have exercised capacity discipline and from 2007-2012, these practices have resulted in cuts of 1.4 million domestic flights and wiped out nearly 100 million domestic seats.
- Medium-sized and smaller airports have felt the brunt of capacity cuts through airline consolidation and the closure of duplicate hubs.
- As part of these trends, Port Columbus, a medium-sized airport, has suffered some air service setbacks, but not to the extent of most peer airports.
- In fact, by comparison, Port Columbus has fared well in recent years with increased seat capacity and quality connections to domestic and global markets.
- Port Columbus serves 32 airports with direct flights on varying frequencies. Port Columbus continuously approaches airlines to expand service.
- Industry experts estimate that daily domestic air service to the west coast from Columbus can generate an annual economic impact for the region of over \$20 million.

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- Daily international air service between the region and Europe could generate a \$50 million annual economic impact.
 - New Air Service Development is economic development that supports the work of the regional growth strategy of Columbus 2020.
 - The three best positioned domestic markets for direct service are the San Francisco Bay Area, San Diego and Seattle. London is best positioned for international direct service.
 - Our Community currently does not offer inducements for direct air service beyond traditional airport incentives. Such incentives are limited by regulation or the Airport's agreements and relationships with other carriers.
 - Other communities across the country have worked with the public and private sector to target travel budgets and provide direct incentives, beyond traditional airport incentives to lure more direct air service.
 - Air service to key markets also may attract additional investment to a community. Business engagement with high technology companies in the San Francisco Bay Area drives a lot of venture capital investment. In looking at the relationship between venture capital investment and direct air service to the Bay Area, on average, cities with direct air service to the Bay Area are exposed to \$110 million in venture capital funding per year versus \$11 million annually for cities without direct service.

Key Recommendations

- Treat air services as an economic driver, like technology, retail, financial services sectors, and target economic development efforts and incentives to invest in air service in a manner consistent with other important industries.
- Organize major corporate and institutional air service users to inform airline travel decisions and approach carriers for service improvement discussions.
- Strengthen coordination efforts of travel, tourism, convention, and sports and entertainment leaders to market, promote and advance the local image and reach.
- Sustain the work of the air services working group by appointing a permanent community Air Services Committee to guide local public and private efforts to support air services expansion with the CRAA.
- Understand business and air services operational trends and craft policies and incentives to locate air services companies and other businesses at or near Port Columbus.
- Look to the Port Columbus area as our transportation center and bring all modes of transportation to the area in order to better connect citizens and visitors to the airport, jobs centers and community attractions.

II. Administration

Air Services Working Group members:

- Geoff Chatas (Chair)
- Mark Patton; Elizabeth Blount
- Ted Adams
- Steve Lyons
- Anthony Precourt
- Jonathon Ramsden
- Dan Rosenthal

Mission: Identify and prioritize top air service needs of the Community; expand awareness of and support for air service development efforts; and develop tools and strategies to attract targeted airlines to meet the identified air service needs.

The working group explored how best to:

- Add new domestic air service destinations
- Add new international air service destinations
- Enhance service to existing air service destinations

III. Approach

The working group broke its work into two streams: short/medium term and long term.

Short/Medium Term

Our immediate work stream is to continue progress towards adding air service domestically to two identified destinations, San Francisco Bay Area and Seattle, and to continue to assess the viability of an international destination in the medium term.

Because there are identified priorities, the work stream looked at tactics to fill seats and methods to establish service, working with State and Local governmental agencies as well as Corporations who will benefit from the increased services.

With Columbus 2020, we have begun to look at the possibility of providing Community incentives for the San Francisco Bay Area as a non-stop destination; using this as a ‘test-case’. The San Francisco Bay Area is Columbus’ top domestic air service target and largest unserved market in terms of passenger demand. Columbus does not currently have nonstop air service to this key market for our region. Further, Columbus is the third largest market from San Francisco without nonstop service. As of the 12 months ending June 2014, Columbus to the Bay Area demand (the sum of daily passengers to San Francisco, Oakland and San Jose airports) is 202 passengers daily each way, with demand to San Francisco in particular increasing 24% in the past two years.

From an economic development standpoint, 15 Bay Area-based firms have economic base operations in the Columbus Region. This is the third highest representation in Columbus after New York and Chicago (important to note, New York and Chicago have 23 and 25 direct flights respectively each day to/from Columbus). These 15 firms employ more than 3,000 in the Region. Additionally, there have been 9 economic development project announcements since 2011 from Bay Area-based companies.

Key to the Bay Area market analysis is the connecting opportunities to other western U.S. destinations which enhance the success of a Bay Area flight. Bay Area- connecting cities without existing nonstop Columbus service include:

City of Columbus Demand (passengers daily each way)	
Seattle	94
San Diego	85
Portland	49
Orange County	37
Ontario	27
Spokane	11
Burbank	11
Boise	8

The test-case group reviewed the aforementioned data and the methods for providing necessary funding to start up and promote this new service.

Long-Term

Ultimately, the Air Services Working Group focused on our short/medium term work and chose to recommend how best to address long-term efforts.

In the Recommendation section, the working group proposes that long term work stream requires the creation of a standing committee of Community leaders to develop strategies and assess future needs and destinations. Further, we will work to engage a broad cross section of constituencies around the region to provide a road map for implementing long term air services that will foster economic development.

By creating another group to continue to assess destinations and incentives, we will be able to continually grow Port Columbus based on the most current situations and research available to the team. In addition, this team will be able to analyze incentives required to partner with airlines to build network maps that include Columbus as a central destination.

IV. Findings and Recommendations

Findings:

- Industry consolidation makes air service expansion difficult. Over past 14 years, our nation's airlines have consolidated from ten major carriers to four. These surviving four carriers capture nearly 90% of the domestic air market.
- Unlike airports with service dominated by one carrier, Port Columbus' market share is balanced among these four remaining carriers
- Port Columbus serves 32 airports with direct flights on varying frequencies. Port Columbus continuously approaches airlines to expand service.
- Airlines have reduced the number of domestic flights and also have restricted capacity growth in a strategy known as capacity discipline. From 2007-2012, these practices have resulted in cuts of 1.4 million domestic flights and wiped out nearly 100 million domestic seats.
- Medium-sized and smaller airports have felt the brunt of capacity cuts through airline consolidation and the closure of duplicate hubs. Columbus has suffered some air service setbacks – but not to the extent most airports have.
- In recent studies, Port Columbus ranks well in comparison to peer airports in: available domestic seats and the quality of its connections to the global air transportation network.
- Certainly, businesses, institutions and the traveling public understand the benefits of direct air service- convenience, time, and access to markets- but our Community now better understands the significant annual economic impact of direct air service, driven by its facilitation of commerce.
- Industry experts, for example, estimate that daily domestic air service to the west coast from Columbus can generate an annual economic impact for the region of over \$20 million. Even more impressive, daily international air service between the region and Europe, for example, could generate a \$50 million annual economic impact.
- Air service to key markets also may attract additional investment to a community. Business engagement with high technology companies in the San Francisco Bay Area drives a lot of venture capital investment. In looking at the relationship between venture capital investment and direct air service to the Bay Area, on average, cities with direct air service to the Bay Area are exposed to \$110 million in venture capital funding per year versus \$11 million annually for cities without direct service.
- The three best positioned domestic markets for direct service are the San Francisco Bay Area, San Diego and Seattle. London is best positioned for international direct service.
- With air service industry consolidations and the marked economic impact of direct air service, airports are pressed to retain service, then work to expand and enhance service. Communities across America, led by state and local government, businesses, institutions, economic development groups, convention and visitor bureaus, are playing an increasingly important role in supporting airport efforts to improve service.

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- Communities are facilitating discussions between major corporate and institutional users of air services and the airlines. They are coordinating marketing and promotional activities to advance the local image and reach. They are also working to understand the marked economic impact direct flights have on the local economy and investing directly in efforts to secure new service.
 - Our Community currently does not offer inducements for direct air service beyond traditional airport incentives. Such incentives are limited by regulation or the Airport's agreements and relationships with other carriers.
 - New Air Service Development is economic development that supports the work of the regional growth strategy of Columbus 2020.

Examples of Return on Community Investment

The working group looked at how other communities have estimated the value of community investment in direct air service and their return on investment. Examples include:

British Airways: Baltimore to London- Estimated \$124M total annual state economic impact - \$18.8M paid between term 2005-2010. The State renewed for additional two year term capped at \$5.5M annually;

Delta Air Lines: Pittsburgh to Paris- Estimated \$130M annual economic impact - Two year term paid \$5M Y1 and \$4M Y2 State & Allegheny Conference on Community Development;

United Airlines: Indianapolis to San Francisco- \$1.5M revenue guarantee, one year term - Flight started Jan. 8, 2014 Indiana Economic Development Corporation;

Consultant Guidance

The JET Task Force and Community leaders had the opportunity to meet with CCAA's air services consultant. The consultant provided excellent insight on trends in the air services industry and the positioning of Port Columbus in these transformative times in the industry.

He generally affirmed the approach and efforts of the Air Services Working Group and provided the following observations on our interest in exploring the use of community investment to help pursue more direct flight services:

- Carpet Bombing is not the way to target markets- CMH is not desperate and desperate markets carpet bomb;
- Continue our approach of prioritizing domestic and international markets and consider incentives only on markets being realistically evaluated;
- Understand that CMH is not the only community targeting these markets and incentives can differentiate CMH from other competitors in this zero sum game air service environment;
- Just like it is a Net Present Value decision for the airline to fly or not, it is a Net Present Value proposition for the community to invest or not.
- CMH is a have market and any investment should incrementally improve CMH's place on the air service grid.

Recommendations

Target Air Service as an Economic Driver

- As the above findings illustrate, our direct air services at Port Columbus not only connect our Community to the world; they have a marked economic impact on our region. Like all economic drivers though, we cannot take our position in air services for granted. Recent air industry trends point to further consolidation of service in our domestic market and increase competition between airports for services—with winners and losers.
- For our future, it is critical for our Community to better treat air services as a jobs center, like the technology, retail, financial services sectors, and engage our Community in understanding and investing in air service like we do these other important industries.
- The Community needs to:
 - Target markets best positioned for new direct flight service based upon current demand, future projections and understanding the overall economic impact new service for these markets would provide our Community;
 - Align key business, institutional and community marketing and convention recruiting efforts to leverage demand for new service to these target markets;
 - Partner with state and local government and business community to develop economic incentives to help secure new direct service and also to attract more air maintenance and other air service-related activities at Port Columbus to further position our Community for direct flights.

Community Air Service Incentives will Position Port Columbus for Better Service

As we consider economic incentives, keep in mind that the more connected the Columbus Area is to the air services grid the better our chances to stay connected. Maintaining and expanding direct air service will better position our businesses, institutions and citizens for economic success in the 21st Century.

- To do this the Community needs to develop the best mechanisms for sustained and focused engagement; making markets by understanding our business needs, directing travel, and attracting visitors; and locating more air service and transportation connections at or near Port Columbus.
- The working group calls for a more thorough review of the traditional types of incentives that the Community offers for business attraction and job creation and consider how best to employ the lessons learned in these experiences to that of the attraction of new air direct service for our Community. In sum we should explore:
 - What state, local, and private sector incentives should we bring to bear to enhance direct service?
 - What are the optimal conditions or parameters we should consider as we develop and employ these incentives?
 - Are there lessons or innovations from other communities that we can learn from and adapt here?

Sustaining Efforts over Time

- As with our other economic development efforts, the Community also must explore how best to sustain these flight attraction initiatives over time to permit ongoing efforts to improve direct service.
- The working group believes the community attention given to direct air service over the past 8 months needs to be sustained. The working group recommends the appointment of standing Air Services Committee, consisting of public, community, and business leaders with the stated goal of aligning the community to assist CRAA's efforts to enhance air service and sustaining these efforts over time.
- This Committee will work with CRAA Leadership, Board of Directors and staff to understand:
 - The current state of air service, frequency of markets served, and how our service compares with peer cities across America; what are the most promising markets to expand or pursue direct air service which support our regional economic growth strategy?
 - Understanding airline service trends and our customer base, what opportunities or concerns should we have regarding our current service and expanded or new service? What can we learn from other communities?
 - How does CRAA currently use incentives to enhance direct flight service? How do other communities assist their airports with community incentives? What incentives our Community should consider?
 - How best to inform the Community on these matters and sustain them over time.
- Airlines make markets for direct air service by evaluating and forecasting travel demand to and from local markets. Our Community can better position ourselves to help make the case for new markets by:
 - Understanding the ties between local businesses and institutions with desired markets, the depth of these relationships and how they may impact current and future travel between our Community and these markets;
 - Understanding and directing travel decisions by local businesses and instructing current and future travel to support our direct air services efforts;
 - Continuing to align our Community promotional events and attractions to leverage our efforts to attract or enhance services to desired markets.

Air Service Related Activities and Transportation Modes at or near Port Columbus

The CRAA, business community, state and local government need to better understand business and air services operational trends and craft policies and incentives to locate air services companies and other businesses at or near Port Columbus.

Additionally, as the Community contemplates other modes of regional and intercity transportation, we should look to the Port Columbus area as our transportation center, connecting citizens and visitors to the airport, jobs centers and community attractions. Again, the CRAA can be very informative on this effort, but the public and private sector need to pursue these matters and sustain these efforts over time.

Here our Community must:

- Look at airline operational trends and explore whether we enhance direct service by pursuing airplane service maintenance and other operational services.
- Look at business and explore trends whether we enhance direct service by pursuing certain business attraction strategies.
- Determine the business case for creating a multimodal center at or near the airport to bring air, car, bus, and passenger rail modes together to connect people to our jobs centers, attractions, and the world.
- Understand best practices and consider using airport and community lands, investment, and incentives to attract these businesses, operational services and transportation modes to airport area.

With our Community backing to prioritize air service needs, Columbus will see a significant positive economic impact as we continue to grow the Port Columbus area.

Regional Transportation Working Group Report



I. Executive Summary of Key Findings and Recommendations

Introduction

In April 2014, Mayor Michael B. Coleman appointed the Jobs, Expansion and Transportation (JET) Task Force to enhance and leverage the Port Columbus airport as an economic hub and the center of transportation for the region. The JET Task Force is comprised of three working groups: Air Services; Economic Development and Regional Transportation. This report summarizes the work of the JET transportation working group, which consists of leaders from Franklin County, the cities of Columbus, Gahanna and Whitehall, and leaders from the airport authority, economic development and transportation sectors.

Areas of Inquiry

The group's work focused on five areas of inquiry. Each area of inquiry resulted in a series of key findings, from which the group based short and long term recommendations. These areas were as follows:

- Area of Inquiry No. 1: Creating multiple transportation choices in the airport area with a regional multimodal transportation hub at or near Port Columbus.
- Area of Inquiry No. 2: Improving connections between the airport area, regional employment centers (such as OSU, Downtown, Easton) and beyond.
- Area of Inquiry No. 3: Providing a rail connection between Port Columbus and Downtown.
- Area of Inquiry No. 4: Sustaining the JET Task Force's transportation recommendations over time.
- Area of Inquiry No. 5: Identify ways to finance the multimodal facility and rail connection between Downtown and the airport.

Key Findings

The transportation working group studied 17 metropolitan statistical areas (MSAs) to assess their mobility choices, including light rail connections between airports and downtowns, and whether these communities have a multimodal center similar to that envisioned by the JET Task Force. Below are the key findings from the working group's research. For a full set of findings by area of inquiry, please see Section III of this report.

- The insight2050 project by MORPC, Columbus2020, and ULI-Columbus indicates long-term demographic shifts and market changes with implications for the region's transportation infrastructure. Key findings show continued strong overall population growth, particularly in the senior and young adult segments. This has implications for both the demands on and nature of transportation systems.
- An airport to downtown light rail connection typically is part of a larger light rail system that connects the airport to key employment centers within the region as well as the downtown.

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- The construction of the first line in a light rail system is generally the most expensive one. This is due to costs associated with the construction of a maintenance yard and other operating costs.
 - To ensure connectivity, a local light rail system should be designed in consideration of the Columbus to Chicago passenger rail project and other passenger rail efforts such as the Ohio Hub.
 - Locating multimodal facilities near or within airport property is an innovative approach in the U.S. Only two of the case studies featured this type of facility near the airport (Minneapolis and Orlando). The most impressive of the two was the Orlando one (facility is in the final planning phase).
 - Importance of building strong Public-Private Partnerships, and developing a successful approach to creating P3s.
 - Importance of gaining support from private sector stakeholders, such as major retailers and employers.

Key Recommendations

Based on the work completed, the JET transportation working group has developed a set of recommendations for each area of inquiry. Key recommendations are summarized below. For a complete list of the recommendations for each area of inquiry, please see section III: “Findings and Recommendations” of this report.

Short Term:

- Recommend COTA incorporate JET Task Force findings into future service plans and in the upcoming NextGeneration study.
- Provide direct COTA bus service by 2016 from Downtown to the airport (as addressed in the Transit Service Review).
- Collaborate with City of Columbus staff working on the Multi-Modal Thoroughfare Plan to plan for the improvement of key streets and transit routes in and around the study area.
- Ensure that regional and local bikeway plans consider connectivity through and to the airport area.
- Collaborate with MORPC staff working on the Regional Thoroughfare Plan to ensure JET Task Force recommendations are reflected in this plan, where appropriate.
- Collaborate with Whitehall and Gahanna to ensure that necessary multimodal infrastructure improvements enhance connectivity to and through the airport area.
- Identify the best location for a multimodal facility (preliminary work underway through the Loop Road Study Addendum).
- Explore two potential fixed guideway corridors from Downtown to the airport area: One featuring light rail using a combination of light rail and street corridors and the second commuter rail using the existing rail freight corridor (underway, via the Loop Study Addendum).
- Establish a strategy to preserve corridor options through such means as maintaining key

right-of-ways and design needs of future infrastructure improvements (such as bridge clearance heights, etc).

- Identify and fund an organization or staff person who would be responsible for convening the team and moving the JET Task Force recommendations forward, including:
 - Formalizing a partnership working group for the Port Columbus area's infrastructure and development coordination
 - Establishing an annual work program
- Create and implement a strategy for public coordination with private sector leadership on regional transit corridor development, with key initial focus on developing a corridor connecting Downtown with the airport area. Collaborate with Community leaders in prioritizing the initiatives with Columbus Partnership, Columbus 2020 and other community organizations to seek creative means to fund the additional studies necessary to advance projects.

Long Term:

- Improve critical airport area corridors and intersections, to include access management, streetscapes, and accommodations for walking, transit and biking. These areas include:
 - 5th Avenue
 - Hamilton Road
 - Cassady Avenue
 - 5th Avenue at Stelzer Road
 - Fifth Avenue at Hamilton Road
 - James Road at Johnstown Road
- Develop a strategy to encourage Transit Oriented Development (TOD) along key corridors as identified above.
- Maximize development and redevelopment potential generated by implementation of any emerging rail system through TOD in proximity to station locations.
- Develop a fixed guideway transit corridor from the airport to Downtown as part of a larger multimodal and regional transportation system (via COTA's NextGeneration plan and other planning documents).
- Preserve the transit corridor right-of-way connecting the airport to Downtown Columbus and key employment centers.
- Develop a regional multimodal center in the airport area with direct connections to the airport terminal and key employment centers.
- Approach Greyhound and other intercity bus services to discuss the relocation of the Downtown bus terminal to a future multimodal center at or near the airport.
- Approach car-for-hire services regarding their potential participation in a multimodal center in the airport area.
- Incorporate intercity passenger rail (commuter and high performance rail) connection(s) to the regional multimodal transportation system.
- Establish an airport area marketing plan. A component of this plan will focus on securing private sector buy-in/support.

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- Identify funding sources to advance the viability of this connection and utilize regional analytical tools like insight2050 to assess overall community impacts and development benefits.
 - Look at potential role of public-private partnerships in funding transportation systems, particularly as in conjunction with development opportunities.
 - Establish public and private partnerships to seek long term financing for both capital and the on-going operating costs for these projects.
 - Incorporate this report's recommendations into future planning documents. The organization or staff person assigned is to provide input into any future planning documents relevant to the JET Task Force study area to incorporate the recommendations of this report, when applicable.

II. Administration

The JET transportation working group was assembled in May 2014 and tasked with providing the JET Task Force with recommendations on the viability of a regional multimodal center at or near the airport, as well as a light rail connection between Downtown and the airport.

The group met for an hour and a half bi-weekly between May and November and included the following members:

- William Murdock, Mid-Ohio Regional Planning Commission (MORPC) (chair)
- Jolene Molitoris, US Rail Car (co-chair)
- Kacey Brankamp, Create Columbus (co-chair)
- Steve Campbell, City of Columbus
- Jonathan Pittman, City of Columbus
- Vince Papsidero, City of Columbus
- Kevin Wheeler, City of Columbus
- Jennifer Gallagher, City of Columbus
- Randy Bowman, City of Columbus
- Michael Sexton, City of Columbus
- Matthew Brown, Franklin County
- Erik Janas, Franklin County
- Jennifer Teal, City of Gahanna
- Ray Ogden, City of Whitehall
- Tory Richardson, Columbus Region Airport Authority (CRAA)
- David Wall, CRAA
- Michael Bradley, Central Ohio Transit Authority (COTA)
- Thea Walsh, MORPC
- Dina López, MORPC

The working group's research approach consisted of the following tasks:

- Review of city plans and other planning documents in effect with relevance to the airport area.
- Presentation from COTA regarding existing services, relevant transit planning initiatives, and the need to demonstrate cost-effectiveness in order to be considered for federal funding. The presentation also included discussion of potential connections (via the Panhandle line, as well as a combination of rail and street corridors).
- Presentation from ORDC and Genesee & Wyoming regarding the Panhandle rail line.
- MORPC presentation on the Columbus to Chicago passenger rail initiative.
- Review of existing transportation infrastructure in the airport area to assess its connectivity to the rest of the city via multiple transportation modes.
- The group researched 17 case studies, two of which featured multimodal facilities near the airport (Memphis, Orlando). Emphasis was given to discussing funding structures in each case study.
- In a telephone interview regarding Memphis multimodal facility. The history of Greyhound moving from downtown to the new facility was discussed. Greyhound was partner in the construction of the facility.

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- Specifically looked at each case study featuring a light rail system to see if a downtown to the airport light rail connection was present, and if so, which phase of the light rail system development it was built in.
 - Telephone interview with Memphis Area Transit Authority's John Lancaster, one of the main project managers who brought the Memphis multimodal center near the airport to fruition. This included discussion of how MATA partnered with Greyhound to move the bus terminal from downtown Memphis to the new multimodal facility. This resulted in Greyhound became a partner in the construction of the facility.
 - Consideration of how best to advance the multimodal regional hub as well as the Downtown to airport light rail connection in current efforts such as: the Airport Loop Study, COTA's NextGeneration Plan, and City of Columbus Multi-Modal Thoroughfare Plan.

III. Findings and Recommendations

While the key findings have been included in the Executive Summary of this report, the JET transportation working group developed a number of detailed findings as well as short and long term recommendations for each of the five areas of inquiry, as outlined below.

Area of Inquiry No. 1: Creating multiple transportation choices in the airport area with a regional multimodal transportation hub at or near Port Columbus.

Findings

- No current direct bus or rail transit connection between Downtown and the airport.
- Some existing and planned bike paths exist in the area.
- A permitting process is currently being created by the airport to allow rideshare services such as Uber.
- The airport area has rail access, currently being operated by Genessee & Wyoming for short line freight movements.
- Locating multimodal facilities near or within airport property is an innovative approach in the U.S. Only two of the case studies featured this type of facility. Orlando's, currently in the final planning phase, was particularly noteworthy.
- The telephone interview relating to the Memphis multimodal facility, conducted with John Lancaster from the Memphis Area Transit Authority (MATA), informed the working group on how Greyhound became engaged (eventually becoming a financial partner) in moving from downtown to the new facility near the airport.
- The insight2050 project by MORPC, Columbus2020, and ULI-Columbus indicates long-term demographic shifts and market changes with implications for the region's transportation infrastructure. Key findings show continued strong population growth, particularly in the senior and young adult segments. This has implications for both the demands on and nature of transportation systems. For example, Millennials have a preference for a larger number of transportation choices, particularly transit choices.

Short Term Recommendations

- Provide direct COTA bus service by 2016 from Downtown to the airport (as addressed in the Transit Service Review).
- Recommend COTA incorporate JET Task Force findings into future service plans and in the upcoming NextGeneration study.
- Conduct a walkability assessment to identify needed improvements (pedestrian connectivity).
- Collaborate with City of Columbus staff working on the Multi-Modal Thoroughfare Plan to plan for the improvement of key streets and transit routes in and around the study area.
- Ensure that regional and local bikeway plans consider connectivity through and to the airport area.
- Collaborate with MORPC staff working on the Regional Thoroughfare Plan to ensure JET Task Force recommendations are reflected in this plan, where appropriate.

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- Collaborate with Whitehall and Gahanna to ensure that necessary multimodal infrastructure improvements enhance connectivity to and through the airport area.
 - Identify the best location for a multimodal facility (preliminary work underway through the Loop Road Study Addendum).
 - Identify key Central Ohio employment centers that will be the focus of connectivity improvements with the airport.
 - Identify key corridors linking the airport to key employment centers, and develop an approach to preserve the corridor right-of-ways.
 - Consider employment centers' connectivity through studies such as COTA's NextGeneration plan and to ensure employee and operations needs of defense related employers in the airport area (i.e. DSCC).
 - Collaborate with Columbus 2020 to ensure the Columbus Region Comprehensive Economic Development Strategy (CEDS) incorporates the JET Task Force's key findings and recommendations.
 - Collaborate with City of Columbus staff working on the Multi-Modal Thoroughfare Plan to plan for the improvement of key corridors (5th Avenue, Stelzer Road, Hamilton Road, James Road, Cassidy Avenue and Johnstown Road).

Long Term Recommendations

- Develop a regional multimodal center in the airport area with direct connections to the airport terminal and employment centers.
- Establish a timeline with a phased approach to achieve multiple mobility choices.
- Approach Greyhound and other intercity bus services (i.e. Megabus, GoBus, etc.) to discuss the relocation of the downtown bus terminal to a future multimodal center at or near the airport.
- Approach car-for-hire services (such as Car2Go, Uber, and the Vehicle-for-hire Board) regarding their potential participation in a multimodal center in the airport area.
- Incorporate new technology and best practices for multimodal planning and implementation of multimodal connectivity projects
- Develop a partnership with Ohio research universities and institutions to incorporate technological advancements into multimodal facility design.
- Incorporate this report's recommendations into future planning documents, when applicable.

Area of Inquiry No. 2: *Improving connections between the airport area, regional employment centers (such as OSU, Downtown Columbus, Rickenbacker) and beyond.*

Findings

- Recognized that the airport to Downtown light rail connection needs to be part of a larger light rail system that connects the airport to key employment centers within the region as well as the Downtown.
- Consideration of the Columbus to Chicago passenger rail, and other passenger rail efforts such as the Ohio Hub, need to be considered as alternatives for a light rail connection between Downtown and the airport continue.

Short Term Recommendations

- Identify key Central Ohio employment centers that will be the focus of connectivity improvements with the airport.
- Identify key corridors linking the airport to key employment centers, and develop an approach to preserve the corridor right-of-ways.
- Consider employment centers' connectivity through studies such as COTA's NextGeneration plan, to ensure employee and operations needs of defense related employers in the airport area
- Collaborate with Columbus 2020 to ensure the Columbus Region Comprehensive Economic Development Strategy (CEDS) incorporates the JET Task Force's key findings and recommendations.
- Collaborate with City of Columbus staff working on the Multi-Modal Thoroughfare Plan to plan for the improvement of key corridors (5th Avenue, Stelzer Road, Hamilton Road, James Road, Cassidy Avenue and Johnstown Road).

Long Term Recommendations

- Incorporate intercity passenger rail (commuter and high performance rail) connection(s) to the regional multimodal transportation system.
- Improve critical airport area corridors and intersections to include access management, streetscapes, and accommodations for walking, transit and biking. These areas include:
 - 5th Avenue
 - Hamilton Road
 - Cassidy Avenue
 - 5th Avenue at Stelzer Road
 - Fifth Avenue at Hamilton Road
 - James Road at Johnstown Road
- Create Transit Oriented Development (TOD) strategies to implement in key corridors as identified above.
- Preserve the right-of-ways of corridors to key employment centers.
- Identify funding sources to support recommendations.

Area of Inquiry No. 3: *Providing a rail connection between Port Columbus and Downtown.*

Findings

- Recognized that the airport to Downtown light rail connection needs to be part of a larger light rail system.
- The Panhandle rail line, owned by the state, is currently leased to Genessee & Wyoming for short line freight movements. ORDC informed the group that this line is highly congested with freight traffic.
- A light rail connection between downtown and the airport is typically part of a larger light rail system, as found in all case studies featuring this downtown to airport light rail link.
- The construction of the first line in a light rail system is typically the most expensive one. This is due to costs associated with the construction of a maintenance yard and other operating costs.
- In order to secure federal funding for light rail, proponents have to demonstrate strong ridership for the proposed line. Ridership between downtown and the airport is not typically the highest. Therefore, most case studies featured an airport light rail link as one of the last phases.
- The insight2050 study is developing analytical tools that may be able to assess the broader impacts of transit corridor investments (i.e. fiscal, transportation, environmental, etc.).

Short Term Recommendations

- Explore two potential fixed guideway corridors from Downtown to the airport area: One featuring light rail using a combination of light rail and street corridors and the second commuter rail using the existing rail freight corridor (underway, via the Loop Study Addendum).
- Conduct a sidewalk assessment to identify needed improvements to support existing and future transit corridors.
- Identify key corridors linking the airport to downtown Columbus, and develop an approach to preserve the corridor right-of-way.

Long Term Recommendations

- Develop a fixed guideway transit corridor from the airport to Downtown as part of as part of a larger multimodal and regional transportation system (via COTA's NextGeneration plan and other planning documents).
- Preserve the transit corridor right-of-way connecting the airport to downtown Columbus.
- Identify funding sources to advance the viability of this connection and utilize regional analytical tools like insight2050 to assess overall community impacts and development benefits.
- Maximize development and redevelopment potential generated by implementation of any emerging rail system through TOD in proximity to station locations.

Area of Inquiry No. 4: *Sustaining the JET Task Force's transportation recommendations over time.*

Findings

- Importance of an advocacy strategy to gain public support (Salt Lake City).
- Importance of gaining support from private sector stakeholders, such as major retailers. The Salt Lake City case study provided an example of a retailer going on a trip to Portland with Salt Lake City transit rail proponents to experience first-hand what having light rail to his store door could look like once completed. This trip resulted in the retailer becoming not only an advocate, but a partner in making Salt Lake City's light rail system a reality.
- Importance of building strong Public-Private Partnerships (PPPs), and developing a successful approach to creating PPPs.

Short Term Recommendations

- Identify and fund an organization or staff person who would be responsible for convening the team and moving the JET Task Force recommendations forward, including:
 - Formalizing a partnership working group for the Port Columbus area's infrastructure and development coordination
 - Establishing an annual work program

Long Term Recommendations

- Incorporate JET's goals into future and ongoing planning studies, including COTA's Next-Generation Plan, Columbus Multi-Modal Thoroughfare Plan and the Airport Loop Study Addendum.
- Create and implement a strategy for public coordination with private sector leadership on regional transit corridor development, with key initial focus on developing a corridor connecting Downtown with the airport area.
- Establish an airport area marketing plan. A component of this plan will focus on securing private sector buy-in/support.
- The organization or staff person assigned will provide input into any future planning documents relevant to the JET Task Force study area to incorporate the recommendations of this report, when applicable.

Area of Inquiry No. 5: *Identify ways to finance the multimodal facility and rail connection between Downtown and the airport.*

Key Findings

- Memphis – Greyhound was a partner and provided funds for the multimodal facility
- Salt Lake City – Some of their light rail system was financed without federal funds
- Portland – The airport engaged in a land swap with a private developer to acquire lands needed for the rail right-of-way.

Short Term Recommendations

- Collaborate with Community leaders in prioritizing the initiatives with Columbus Partnership, Columbus 2020 and other Community organizations to seek creative means to fund the additional studies necessary to advance projects.

Long Term Recommendations

- Establish partnerships similar to above to seek long term financing for both capital and the on-going operating costs for these projects.
- Look at potential role of public-private partnerships in funding transportation systems, particularly in conjunction with development opportunities.

Economic Development Working Group Report



I. Executive Summary of Key Findings and Recommendations

Introduction

In April 2014, Mayor Michael B. Coleman appointed the Jobs, Expansion and Transportation (JET) Task Force to enhance and leverage the Port Columbus airport as an economic hub and the center of transportation for the region. The JET Task Force is comprised of three working groups: Air Services; Economic Development and Regional Transportation. This report summarizes the work of the economic development working group.

This group's charge was to consider how best to leverage and partner with community stakeholders to grow the economic wealth of our region by creating joint economic development strategies to coordinate future land use planning, infrastructure investment, service delivery, development incentives and marketing efforts for the entire area around Port Columbus.

Areas of Inquiry

The work of the economic development working group focused on five areas of inquiry in the Study Area:

- Assessing the types and needs of the employers and businesses to determine how best to retain and expand jobs.
- Evaluating and cataloguing the available development sites to ensure business growth is possible in the Study Area.
- Exploring the look, feel, and aesthetics and probing ways to improve the area's image.
- Understanding the status of the infrastructure and recommending critical improvements.
- Reviewing the number of governmental jurisdictions with responsibilities in the area and identifying ways to coordinate public resources.

Key Findings

- The Study Area is home to over 1,200 businesses and more than 19,000 employees. While the retail trade represents the largest employment sector at 12%, Defense Supply Center Columbus (DSCC) is the largest employer with 8,000 employees.
- Given the economic impact of DSCC, Base Realignment and Closure (BRAC) is a significant concern.
- Many of the remaining sites for development are infill sites, posing greater development limitations.
- The general appearance and condition of many properties detract from development potential of the area.

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- Access to the Port Columbus study area via I-670 and I-270 is excellent.
 - Public transportation options and access are minimal.
 - Road networks to or within the Study Area are inadequate, limiting the potential of targeted sites.
 - The study area's jurisdictions have seen increasing demands and constrained resources hampering the ability to address critical economic development needs including costly infrastructure.
 - Focused, aligned, investment in the Port Columbus study area is needed for it to reach its highest potential.

Key Recommendations

- Establish a marketing plan.
- The plan should include a joint marketing effort among Columbus, Whitehall, Gahanna, Franklin County, Columbus 2020, the Ohio Rail Development Commission and the Genesee and Wyoming Railroad to promote industrial sites along the Columbus and Ohio River Railroad running directly south of Port Columbus.
- Develop a working group with Columbus, Gahanna, Whitehall, Franklin County and the Airport Authority to coordinate retention efforts.
- Position DSCC for future success by continuing to support the Columbus Region Defense Efforts to prepare and respond appropriately for a BRAC.
- Develop a plan for adding signage, lighting and other amenities to enhance the area, most specifically the gateways to the Port Columbus Study Area.
- Incorporate design standards, such as those identified in the 2008 Port Columbus Joint Economic Development Strategy, in new development.
- Support commuter rail connectivity from Port Columbus to Downtown and beyond.
- If light rail is established between Downtown and the Study Area, Transit Oriented Development should be facilitated in the vicinity of transit stations. This would include identification of sites and incentive tools to encourage transit supportive uses and densities. A key benefit of fixed-guideway transit systems is their potential as a catalyst for development in areas such as the Fifth Avenue corridor.
- Upgrade Fifth Avenue from Stelzer Road to Hamilton Road to facilitate redevelopment of the corridor. Improvements should consider inclusion of access management, streetscape, and contemporary elements including conduits for future fiber optic connectivity and accommodations for walking, ground transit and bicycling.

II. Administration

The JET economic development working group was created in May 2014 with the charge of creating economic development strategies for the Port Columbus Study area, for the consideration of the JET Task Force.

The economic development working group met bi-weekly from May through November, with a minimum meeting duration of an hour and a half. The working group was comprised by the following:

- Jean Carter Ryan, Columbus-Franklin County Finance Authority, Chair – Economic Development Committee, JET Task Force
- Michael Dalby, Columbus Chamber, JET Task Force member
- Michael Johnson, East Columbus Civic Association, JET Task Force member
- Mark Barbash, Finance Fund
- Drew Vennemeyer, Quandel Construction, NAIOP representative
- Bob White, Daimler
- Irene Alvarez, Columbus 2020
- Elaine Roberts, CRAA
- Tory Richardson, CRAA
- Steve Campbell, Columbus
- Randy Bowman, Columbus
- Jonathan Pittman, Columbus
- Anthony Jones, Gahanna
- Zach Woodruff, Whitehall
- Alex Beres, Franklin County Economic Development

III. Findings and Recommendations

Port Columbus Development Partnership

In 2008, a partnership of Columbus, Gahanna, Whitehall and the Columbus Regional Airport Authority led to a Joint Economic Development Strategy. This strategy served as a starting point for the economic development working group, which determined that many of its conclusions and vision remain very relevant. Key provisions include:

- Establishing business sector priorities
- Joint business retention and expansion
- Maximizing investments in economic and infrastructure assets
- Supporting airport operations and improvements through expansion and land use controls
- Joint marketing
- Higher development standards and environmental enhancements
- Strengthening existing commercial nodes
- Establishing new mixed-use nodes
- Strengthening light industrial and office uses
- Supporting airport expansion
- Maintaining sensitivity to noise contours
- Connectivity through improvements to the road network and bikeways

A key element of the Joint Economic Development Strategy was the identification of 15 opportunity sites. The economic development working group revisited these sites, updating ownership, land use and zoning information. Some sites were eliminated and some sites were added. A series of maps depicting this information is appended to this report.

Area of Inquiry No. 1: Assessing the types and needs of the employers and businesses to determine how best to retain and expand jobs.

Findings

- The Port Columbus Study area spans 10.72 square miles, with property in Columbus, Gahanna, Whitehall and Mifflin Township.
- The Study Area is home to over 1,200 businesses and more than 19,000 employees. While the retail trade represents the largest employment sector at 12%, Defense Supply Center Columbus (DSCC) is the largest employer with 8,000 employees.
- Given the economic impact of DSCC, Base Realignment and Closure (BRAC) is a significant concern.
- The last BRAC was in 2005, BRACs are typically held every 5-10 years. It is currently projected that DSCC is over capacity by 25%.
- The State of Ohio, CRAA, Franklin County, and the Cities of Columbus, Gahanna, and Whitehall offer economic incentives to area employers based upon business sector; location of operations; jobs created and/or retained, and type and extent of investment.

Recommendations: Job Retention

- Develop a working group with Columbus, Gahanna, Whitehall, Franklin County and the Airport Authority to coordinate retention efforts.
- Explore a joint marketing effort among Columbus, Whitehall, Gahanna, Franklin County, Columbus 2020, the Ohio Rail Development Commission and the Genesee and Wyoming Railroad to promote industrial sites along the Columbus and Ohio River Railroad running directly south of Port Columbus. Many rail lines serving potential industrial sites are either a Class I railroad – too large to make smaller “retail” industrial stops – or a smaller Class II line that connects directly to only one Class I line. In contrast, the Class II Columbus and Ohio River Railroad serves smaller industrial stops with the option of connecting to both CSX and Norfolk Southern. A number of the Study Area’s development sites are served by this line. In addition to rail service, they have adjacent airport and interstate access and their central location within a major metropolitan area provides an available work force.
- Position DSCC for future success by continuing to support the Columbus Region Defense Efforts to prepare and respond appropriately for a BRAC.
- Encourage the development of more significant public-private partnerships with regard to defense efforts.
- Work with property owners and businesses to ensure runway airport property remains available for aviation-related services.
- Establish a periodic meeting of businesses in the area.
- Ensure local retention and expansion programs include aspects of businesses’ interaction with and relationship to the airport, as well as engaging businesses on workforce and transportation-related needs.

Recommendations: Job Attraction

- Identify opportunity sites with the best job-ready attributes and market to appropriate end users. Coordinate information on available sites and share with local realtors and Columbus 2020.
- Prepare an airport area information guide with available sites, incentives and contact information.
- Develop targeted marketing for growth sectors. Consider air service maintenance facilities as a key target for the airport and its immediate footprint. Focus local workforce resources to ensure a qualified workforce is available.
- Consider marketing to bring Next Generation technology (NextGen) to the region based on Central Ohio’s aviation-related assets. NextGen is a new air traffic management system for year 2025 and beyond which will replace ground-based radar and radio navigation aids.
- Encourage stakeholder/property owner input on development of marketing plans and studies for their sites.

Area of Inquiry No. 2: *Evaluating and cataloguing the available development sites to ensure business growth is possible in the Study Area.*

Findings

- Greenfield properties are scattered throughout the Study Area with no significant aggregation.
- Many of the remaining sites for development are infill sites, posing greater development limitations.

Recommendations

- Identify opportunity sites with the best job-ready attributes and market to appropriate end users. Coordinate information on available sites and share with local realtors and Columbus 2020.
- Prepare an airport area information guide with available sites, incentives, and contact information.
- Work with property owners and businesses to ensure that property with direct airport access remains available and is marketed to succeed in the area of aviation-related services.

Area of Inquiry No. 3: *Exploring the Study Area's look, feel, and aesthetics and probing ways to improve its image.*

Findings

- The area immediately in and around the Port Columbus Study Area is developed with a wide array of urban uses.
- The general appearance and condition of many properties detract from development potential.
- The area would benefit from enhanced code enforcement and other property code actions.

Recommendations

- Support Columbus' newly enacted program that would allow the City to assess civil penalties for damaged and unsafe properties as a means to step up code enforcement.
- Develop a plan for adding signage, lighting and other amenities to enhance the area, most specifically the gateways to the Port Columbus Study Area.
- Incorporate design standards, such as those identified in the 2008 Port Columbus Joint Economic Development Strategy, in new development.
- Implement permanent signage and gateway features within Gahanna's Office, Commerce and Technology (OCT) District. The OCT district is located south of Taylor Road, west of Reynoldsburg-New Albany Road, north of the railroad tracks (which form the south city limits) and east of Morrison Road.

Area of Inquiry No. 4: *Understanding the status of the infrastructure and recommending critical improvements.*

Findings

- Access to the Port Columbus study area via I-670 and I-270 is excellent.
- Public transportation options and access are minimal.
- Targeted areas within the study area lack sufficient infrastructure, such as centralized utilities.
- Road networks to or within targeted sites are inadequate.
- Key streets and intersections require improvement.

Recommendations

- If light rail is established between Downtown and the Study Area, Transit Oriented Development should be facilitated in the vicinity of transit stations. This would include identification of sites and incentive tools to encourage transit supportive uses and densities. A key benefit of fixed-guideway transit systems is their potential as a catalyst for development in areas such as the Fifth Avenue corridor.
- Coordinate business retention/expansion plans with ongoing development of improved transit connections to Port Columbus.
- Support commuter rail connectivity from Port Columbus to Downtown and beyond.
- Improve the intersection of Fifth Avenue and Hamilton Road to facilitate smoother traffic flow, visibility and corridor branding, including a gateway feature.
- Improve infrastructure to redevelop the Bedford II landfill site by paving Bricklawn Avenue and extending Leavitt Service Road.
- Extend Tech Center Drive from Science Boulevard to Taylor Station Road in order to encourage development throughout the OCT District.
- Upgrade Fifth Avenue from Stelzer Road to Hamilton Road to facilitate redevelopment of the corridor. Improvements should consider inclusion of access management, streetscape, and contemporary elements including conduits for future fiber optic connectivity and accommodations for walking, ground transit and bicycling.
- Improve the intersection of Fifth Avenue and Stelzer Road to facilitate smoother traffic flow, visibility and corridor branding, including a gateway feature.
- Improve the entrance to the Veterans Hospital located at the intersection of Stelzer Road and North James Road for smoother traffic flow and improved accessibility.
- Improve the intersection of Stelzer Road and Johnstown Road to facilitate redevelopment of the corridor. Improvements should consider inclusion of access management, streetscape, and contemporary elements including conduits for future fiber optic connectivity and accommodations for walking, ground transit, and bicycling.

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- Improve Cassidy Avenue from Bexley corporate limits south of Fifth Avenue to Agler Road to facilitate redevelopment of the corridor; improvements should consider inclusion of access management, streetscape, and contemporary elements including conduits for future fiber optic connectivity, and accommodation for walking, ground transit, and bicycling.
 - Improve the Buckles Tract, a 90 acre vacant lot at the southwest corner of Tech Center Drive and I-270, with improvements such as roadways, water lines, sewer lines, utility lines and storm water management components.
 - Improve Central Park of Gahanna's infrastructure with upgrades including street widening, curb and gutters, multi-purpose paths, and right of way acquisition along Morrison Road, Claycraft Road and Science Boulevard.
 - Continue with Phase 3 of the fiber optic expansion project, which will increase the capacity of the GahannaNet Financial Incentive Program.

Area of Inquiry No. 5: *Recognizing the number of governmental jurisdictions with responsibilities in the area and identifying ways to coordinate public resources.*

Findings

- The Port Columbus study area's jurisdictions have seen increasing demands and constrained resources hampering their ability to address critical economic development needs including costly infrastructure.
- Many governmental jurisdictions service or regulate activities within this area. The Columbus Regional Airport Authority, a public agency with a board appointed by the City of Columbus and Franklin County, operates Port Columbus. Local government services like police, fire, water, sewer and streets are provided by numerous entities, based upon location of the property. Port Columbus lies within the City of Columbus; however businesses, development sites, and residential neighborhoods in the Study Area lie within Columbus, Gahanna, Whitehall, Mifflin Township and Franklin County.
- As costs continue to increase, strategic investments become more difficult to make.
- Focused and aligned investment in the Port Columbus study area is needed for it to reach its highest potential.

Recommendations

- Formalize a partnership working group. Identify and fund a staff person who would be responsible for convening the team and moving recommendations forward.
- Establish an annual work plan.

JET Task Force Resources List:

- JET Task Force Kickoff Meeting Presentation 04/11/14 *
- JET Task Force Meeting Presentation 06/06/14 *
- JET Task Force Meeting Presentation 08/15/14*
- JET Task Force Meeting Presentation 09/26/14*
- JET Task Force Meeting Presentation 10/31/14*
- JET Task Force Meeting Presentation 2/25/15*
- JET Task Force Economic Development Report 5-30-14*
- JET Task Force Economic Development Report 6-6-14 *
- JET Task Force Economic Development Report 8-14-14*
- JET Task Force Transportation Center Working Group Presentation 5-30-14 *
- JET Task Force Transportation Working Group Update Presentation 7-7-14 *
- JET Task Force Transportation Presentation 8-15-14*
- JET Task Force Air Service Opportunities Presentation 5-14-14 *
- JET Task Force Air Services Working Group Presentation 5-22-14 *
- JET Air Services Presentation 6-6-14*
- Port Columbus Area Development Partnership Joint Economic Development Strategy*
- East Columbus Neighborhood Plan (2012), City of Columbus *
- Northern Indiana/Ohio Passenger Rail Corridor Feasibility Study and Business Plan Executive Summary*
- Aviation Activity Forecast Summary for Port Columbus
- BRAC/Columbus Region Defense Efforts Summary
- Hamilton Road Corridor Revitalization Plan (2008), City of Columbus
- NextGen Initiative Summary for Columbus
- Ohio Aerospace, Aviation and Defense 2013 Strategic Plan
- Port Columbus Land Use Plan, Columbus Regional Airport Authority
- Public Nuisances and New Civil Penalty Fact Sheet

*For links to these documents, please refer to the JET Task Force Website, www.columbus.gov/planning/jettaskforce *