

MARKET ANALYSIS

SMALL BUSINESS OPPORTUNITY STUDY

HILLTOP USA

WEST BROAD STREET & SULLIVANT AVENUE



THE CITY OF
COLUMBUS
ANDREW J. GINTHER, MAYOR

DEPARTMENT OF
DEVELOPMENT

WITH THE COMMUNITY
PARTNERING **HBA HILLTOP**
Business Association

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Introduction and Executive Summary

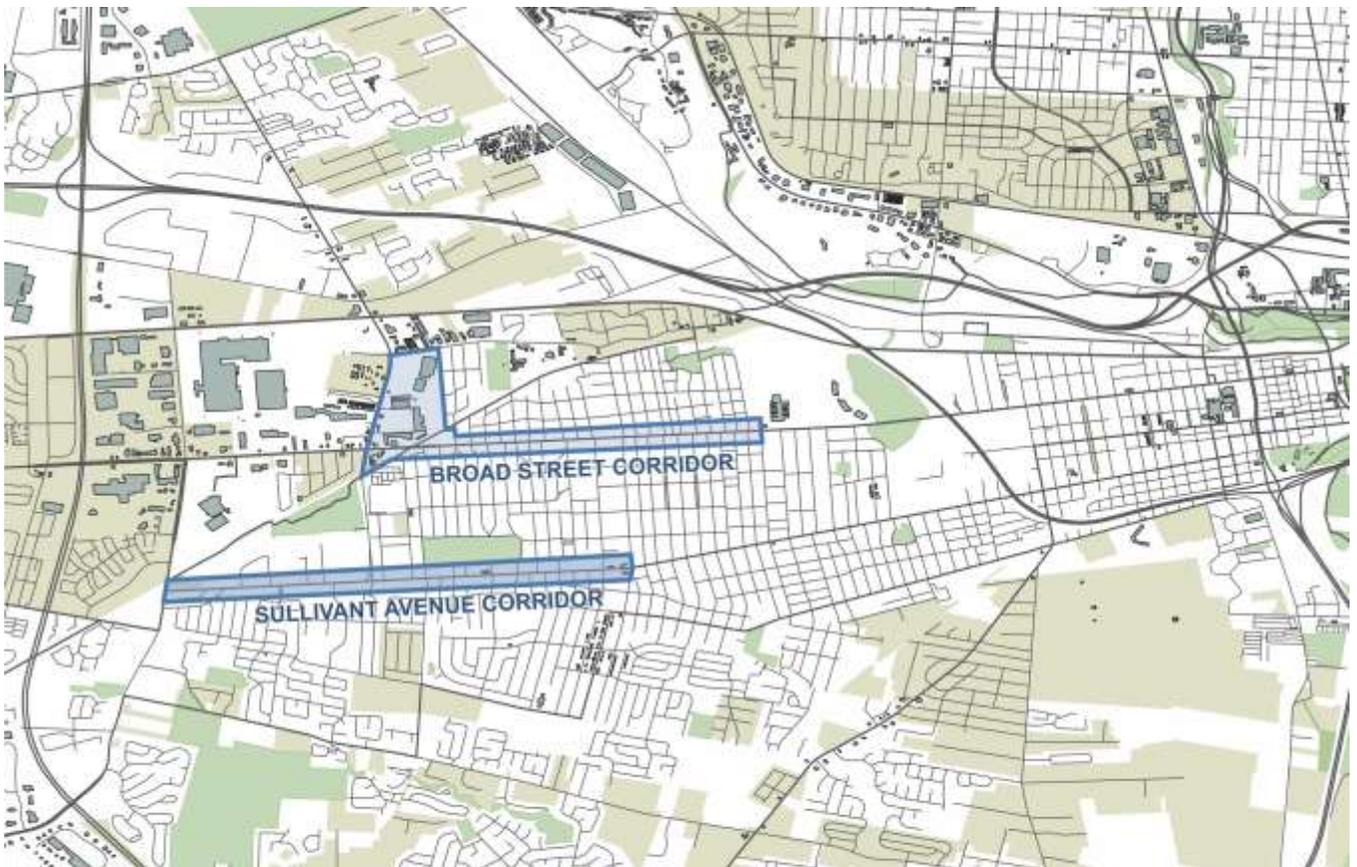
Columbus is the 14th largest city in the United States and has a population of over two million within its metropolitan statistical area. With these numbers, it is an attractive market for most retail and services, but rather than being distributed across the area, these businesses have largely concentrated in the northwest quadrant. Commercial corridors in other parts of the city may be struggling. This is certainly the case within the Hilltop Neighborhood, where location and traffic patterns should result in more vibrant retail, dining, and services than are found within the area. This analysis seeks to define and understand current conditions within the Hilltop Neighborhood, and

specifically on the Broad Street and Sullivant Street corridors. Based on that analysis, it recommends actions that can be taken by the City's Economic Development Division, along with its partners, to restore vitality to these neighborhoods.

Intent

The City of Columbus seeks balanced, equitable neighborhoods throughout the City where residents all have access to financial stability and economic opportunity. These conditions do not exist in all areas, and the Hilltop Neighborhood is one where there is a need for revitalization. Broad Street is one of six corridors surrounding the downtown that are designated under the City's Neighborhood Commercial Revitalization (NCR) program, which offers technical assistance, loans and matching grants, capital improvements and planning services.

OVERVIEW MAP OF THE STUDY AREA CORRIDORS



This assistance is provided in conjunction with established business associations in each area. The Hilltop Business Association has been in existence since 1926, hosting events and working toward the betterment of the surrounding community. The Hilltop Business Association addresses local and national issues that impact its members.

The City and Hilltop Business Association have made revitalizing the Hilltop Neighborhood a priority and are prepared to commit resources to the task. This study is intended to assess conditions in the area, determine the best opportunities informed by a market analysis, and chart a path forward that is both strategically sound and achievable.

The focus of the analysis is the two commercial corridors of West Broad Street and Sullivant Avenue in West Columbus. The Broad Street Corridor extends from Highland Avenue in the east to Wilson Avenue on the west, and includes the NCR area between Highland Avenue to Hague Avenue. The Sullivant Avenue corridor lies between Harris Avenue in the east and Georgesville Road on the west.

Methodology

The analysis and strategy was developed by Place Dynamics LLC, with the Assistance of Planning Next, over the course of several months between March and September of 2018. Beginning in March and extending throughout that time, the planning team conferred with a large number of stakeholders including business and property owners, business employees, commercial brokers, nonprofit organizations, business and economic development agencies, and others. Those interviews were used to develop an understanding of the issues and opportunities faced in the corridors, as well as to explore the potential for initiatives that might be considered.



There is a commitment to turning around conditions in the Hilltop Neighborhood.

A variety of data sources were used to conduct the quantitative portions of the analysis. Demographic data was drawn from the American Community Survey and from ESRI Business Analyst. Due to concerns about the accuracy of ESRI retail industry estimates, Place Dynamics prepared an alternate analysis using proprietary models. These were based on an actual business inventory taken during a visit to the neighborhood. Additional data concerning area employment was collected from the Quarterly Census of Employment and Wages using the Census Bureau's On the Map data access tool. This was used to model the potential demand for goods and services from employees commuting into the area.

The market analysis was completed in June of 2018. Shortly thereafter, the planning team met with City staff and representatives of the Hilltop Business Association to review the findings and consider strategic alternatives. From this, the planning team prepared a final strategy and implementation plan for the corridors.

Key Findings

The Hilltop Neighborhood, and particularly the Broad Street Corridor, have many of the critical factors that usually produce healthy commercial districts and stable residential zones. Broad Street (US Highway 40) is a prominent route through the city and has strong traffic. There is a large employment base within easy reach of the corridors, and more than 30,000 people

commute in to work. The neighborhood is close to downtown and neighborhoods where redevelopment is occurring.

There are indications that conditions are improving for the Hilltop, but yet it is faced with challenges it must overcome. For the commercial corridors to attract desirable businesses, the surrounding residential neighborhoods need to be able to attract stable residents who will invest in owned housing, or demand a better quality rental market. Other changes need to occur to attract these residents.

Recommendations

There are actions that the City of Columbus, Hilltop Business Association, and their partners can take to restore vitality to the Broad Street and Sullivant Avenue corridors. These include:

- Developing initiatives to turn around conditions in struggling residential neighborhoods, stemming population

losses and improving household income.

- Helping existing businesses to expand, including both chain and independent businesses that have the market and means to redevelop at their existing site or at another, larger location.
- Recruiting new businesses to the Hilltop through business startup.
- Improving communication and outreach to the commercial brokerage and real estate development communities.
- Encouraging redevelopment at key locations where investment will be visible and is likely to influence similar activity on nearby sites or buildings.
- Creating new incentives and tools to enable private real estate investment, business formation, and business expansion.
- Amending programs and regulations to offer greater flexibility for property reuse and redevelopment.

Greater Hilltop Today

The market analysis and strategy were meant to be grounded in a solid understanding of the realities of the Hilltop Neighborhood. To develop this knowledge, the planning team spent a great deal of time in the area observing it, as well as reviewing prior planning and data concerning the area. This chapter offers a summary of the key findings.

Area Description

The Hilltop Neighborhood is relatively close to downtown, on the City's west side. Downtown Columbus is itself an attractive and vibrant area with concentrations of employment and a growing residential base. The neighborhood just west of the river (Franklinton) is beginning to be the target of similar investment.

West Broad Street passes through the Hilltop and Franklinton, leading from the heart of downtown to the western suburbs. It is a significant highway (US Highway 40), the National Road, playing an important role in early settlement of the Midwestern states.

The Hilltop area was first settled in 1795 by Louis Sullivant, though it remained mostly rural until the beginning of the 1900's. The Columbus State Hospital for the Insane and the Fisher and Delphi Divisions of General Motors were among the major employers creating jobs for neighborhood residents. The departure of these and other businesses was one factor in the area's decline.

The neighborhood has a mix of uses and due to its construction over several decades, is not defined by any one architectural style or urban pattern. Within the older portions to the east, there is a mix of single family and two-family homes, scattered with occasional larger buildings. The



The study area includes a large proportion of the City's older housing stock west of the river. Older construction is shown in dark purple. Source: 5-year average (2008-2012) American Community Survey

commercial uses in this area were built in an urban pattern with mostly one and two-story brick structures having commercial uses on the ground floor and apartments above. Most are a simple commercial vernacular style with occasional craftsman, Tudor revival, classical revival, Mediterranean, art deco, or other early 20th Century designs.

Further west, the area transitions to a post-World War Two suburban neighborhood, with single story homes and commercial strips or freestanding buildings along the corridor. Most of these, along with similar infill buildings in the older commercial area, have little architectural embellishment or landscaping to soften their appearance. Both here and in the older part of the corridor, later alterations to the buildings have sometimes not been sympathetic to the original design, as well as being poor in quality, and further detract from the appearance of the area. Newer construction has met a higher design standard.

Several important anchors or assets remain in the area and will contribute to its revitalization. These include concentrations of employment ringing the corridors including the state office buildings to the east. Hollywood Casino Columbus, just west of the study area, is another significant entertainment destination with the potential for expansion. Consumer Square West, at the northwest corner of Broad Street and Wilson Road (and just

outside of the study area), is an important retail anchor with Kroger, the area's only full-line grocery store. The loss of its Target was a blow to the neighborhood.

West Broad Street

West Broad Street is US Highway 40, and remains an important route into (or away from) the downtown. Central Ohio Transit Authority (COTA) Line 10 runs on Broad Street, from downtown to Doctor's Hospital, including a stop at the casino.

The street has two lanes in each direction for much of its distance, although there is only one driving lane and a bicycle lane heading east from Warren Avenue. On-street parking is provided between Harris Avenue and Wheatland Avenue. This is the area in which most buildings are set to the street with little to no parking provided. Further west, a post-war suburban pattern prevails, and most commercial properties have some parking available.

The Great Western Shopping Center anchors the western end of the district, fronting on Wilson Road. It has a total building footprint of 344,273 square feet anchored by Shopper's World, Save-a-Lot, and Discount Fashion Warehouse, with approximately 114,250 square feet (33.2 percent of the total) currently vacant. Across from this center, Consumer Square West has fared much better. It is anchored by Kroger and Sally Beauty Supply, although Target closed in 2015.

Still further west and outside of the district, the Westland Mall is a now-shuttered 860,000 square foot enclosed mall. It closed in 2012.

Traffic counts on Broad Street are good, with recent average daily traffic counts of 22,500 at Wilson Road, 16,500 at Hague Avenue, and 20,100 at Wheatland Avenue.

Sullivant Avenue

Sullivant Avenue begins at Georgesville Road on the west, and is built as a four lane street as east far as Hague Avenue, where it drops to two lanes. There is no on-street parking in the study area. COTA Line 6 follows Sullivant Avenue from downtown, turning north on Georgesville Road to go as far as the casino.

There is a considerable amount of light industrial activity interspersed with commercial uses between Georgesville Road and Wilson Road. Between Wilson Road and Hague Avenue, there are a number of residential uses mixed with commercial. In this stretch, commercial buildings tend to date from the first half of the 20th century, and few have more than a handful of parking spaces, often behind the building. The historic Camp Chase



Broad Street looking west at Eureka Avenue.



Sullivant Avenue looking west near Brinker Avenue.

Confederate Cemetery is also located in this area. As a result of the mix of uses, commercial is spread out and isolated in pockets, rather than concentrated.

A large number of ethnic businesses are located along Sullivant Avenue, including several of Hispanic, Middle Eastern, and African origins.

Traffic volume along Sullivant Avenue is moderate, and suited to a neighborhood commercial corridor. The average daily traffic volume at Georgesville Road is 16,100. This rises to 19,500 at Wilson Road, and drops to 14,200 at Hague Avenue.

Prior Planning

A great deal of analysis and planning has already gone into the study area. This market analysis may be used to support or test assumptions made in those documents. Several recent and relevant studies and plans are summarized here.

Housing in the Hilltop (June 2015)

In August 2014, The Kirwan Institute was contracted by Homes on the Hill CDC (HOTH) to conduct a preliminary needs assessment with a focus on housing, for the Greater Hilltop community. The primary goal was to better understand the housing market in order to make more strategic investment decisions to promote neighborhood stabilization and opportunity. A secondary goal of the study was to identify existing community assets which can be built upon with housing investments.

Key assets identified include:

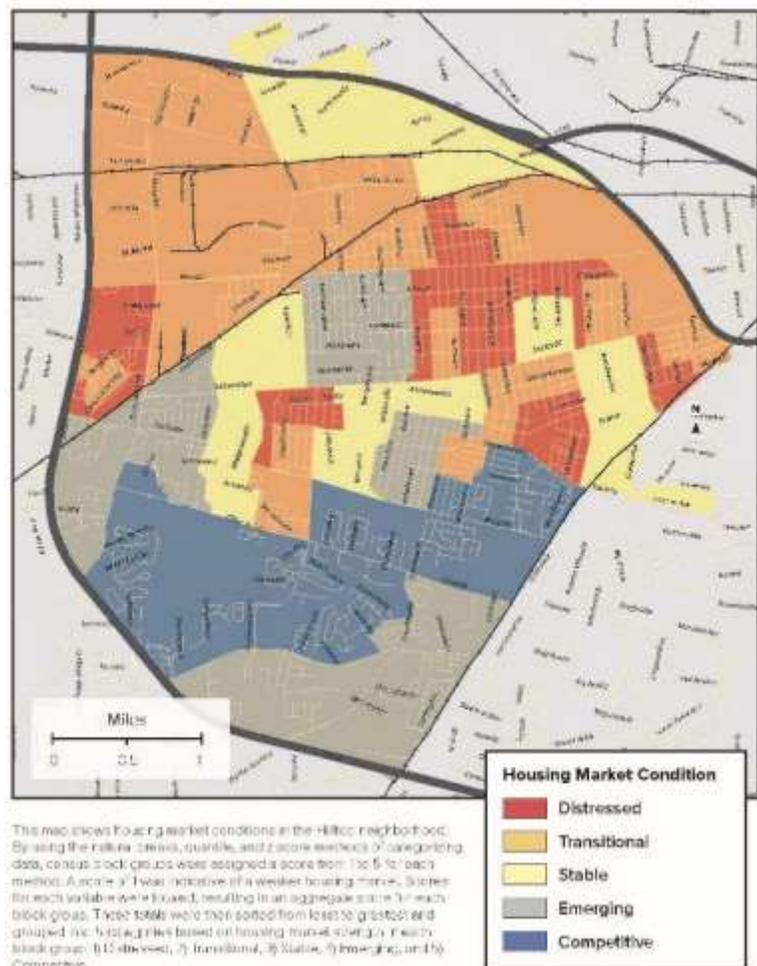
- Strong pride in neighborhood
- Hard working, friendly, and diverse residents
- Parks and other neighborhood amenities (YMCA, library, etc.)
- Accessibility and places of worship

Neighborhood challenges include:

- Ineffective redevelopment efforts
- Absence of large anchor institutions
- Vacant housing stock and absentee property owners
- Crime and safety
- Housing and property maintenance
- Lack of educational resources
- Declining homeownership

The study created a housing market typology which “allows stakeholders to develop a more nuanced understanding of the housing market realities of the communities in which they are investing and set priorities accordingly.” The typology is intended to help guide investment toward those areas which not only need investment, but which are also likely to *benefit* from that investment.

Block level census data was compiled for each block group in



the Greater Hilltop area. Several indicators were used for measurement including number of housing and commercial units, vacancy rates, foreclosures, owner occupancy rates, home values, and affordability. The results were used to categorize market conditions into five categories: distressed, transitional, stable, emerging, and competitive.

Key recommendations from the study include:

- Identify opportunities for concentrated acquisition of units or property in transitional zones
- Develop and communicate commercial features available to current and future residents
- Improve “perception” of neighborhood
- Conduct additional asset mapping and supplement housing data with other indicators of stability (crime, poverty, code violations, etc.)
- Develop a pro-active code enforcement strategy
- Develop a common vision that unites the different groups and efforts already working toward positive change in the community

Hilltop & West Broad Corridor Market Analysis (2010)

BLVD Strategies prepared a market study for the Hilltop Business Association in 2008, and the information from that study was updated and summarized for the 2010 report. The study area extended along West Broad Street from Highland Avenue on the east to Demorest Avenue on the west. The study found that the Hilltop West Broad corridor is home to over 150 businesses occupying 430,000 square feet of space.

The typical West Broad merchant draws 70 percent of its customers from the Hilltop Trade Area shown in the figure below. Trade area demographics include:

- 62 percent of Hilltop households are occupied by families (vs. 54 percent city-wide)
- \$40,000/year median household income
- 58 percent homeowners (vs. 51 percent city-wide)
- \$105,000 median home value
- Income levels 12 percent below city-wide benchmark
- \$450 median monthly rent for 2-bedroom apartment

The study identified two key retail submarkets, including one within a 1-mile radius of West Broad Street and Hague Avenue containing 20,000 persons, over 500 business establishments, and 5,400 employees. The other key submarket identified is the Westgate Subdivision, which is attracting young, well-educated couples and younger families.

The study calculated retail spending patterns and found market support for the following retail categories:

- **Food and Fun.** Sit-down restaurants, family style restaurants, and deli/sandwich shops
- **Community and Culture.** Ethnic restaurants, coffee shop, bakery, and bicycle shop
- **Resale and Recycle.** Upscale clothing/furniture consignment, used maternity/children’s/toys, recycling/gardening equipment, and antiques/collectibles
- **Convenience and Care.** Grocery/pharmacy, medical office/healing centers, health and beauty care, fitness center



West Broad Street Economic Development Strategy (2005)

The overall purpose of the study was to guide revitalization of West Broad Street from Highland to Terrace avenues in the Hilltop. The study was conducted by the City of Columbus Planning Division. It identified strategies to achieve the following goals:

- To create a commercial district to serve existing and future Hilltop residents and people that work in the Hilltop.
- To promote a mixed-use environment. Buildings should have neighborhood-oriented commercial and office uses on the first floor and residential uses on the second floor.
- To create a special and unique place with the use of design standards and guidelines, streetscape enhancements, and marketing.
- To work towards the creation of a safe and clean environment.
- To create an environment where businesses can be successful and thrive.



WEST BROAD STREET ECONOMIC DEVELOPMENT STRATEGY

Greater Hilltop Plan (June 2001, Amended 2010)

The amendment to the Plan provided recommendations focused on land use and urban design. An implementation strategy was crafted around the following components:

- Organization, education, and outreach
- Plan amendment and revision
- Development review checklist
- Action oriented recommendations

The Plan identifies several development opportunities within the W. Broad Street and Sullivant Av. Corridor study area. These projects include Live/Work units on W. Broad St; W. Broad Street façade enhancements; Sullivant Avenue corridor façade improvements, W. Broad Street and Wilson Road inter-



section mixed use

Planned Developments

Over \$34 million in capital improvement funding has been allocated in the City's budget for projects that include sidewalks, street streetscapes, and lighting. These projects will be undertaken as part of Hilltop revitalization efforts and are a part of coordinated broader multi-departmental and multi-agency efforts. The planned capital improvement spending is in addition to funding that is already available under the Neighborhood

Commercial Revitalization (NCR) Program and other funding commitments.

Demographics

The Hilltop trade area comprises 18.53 square miles. The total population is estimated at 77,126 (ACS 2011-2015) and includes residents from portions of the Franklinton, Central Hilltop, Westgate, Hilltop, Wilshire Heights, Holy Hill, and Georgian Heights neighborhoods. According to the ACS data, the study area population declined by nearly 5,000 residents between 2010 and 2015.

The model used to forecast market demand produced similar results, estimating a 2018 population of 77,789 persons, and a decline of 4,996 residents over the past five years. The model projects continued population losses to 56,510 residents by 2028.

The median age is forecast to increase over the period 2017-2022, from 34.7 years to 34.9 years of age. In terms of age cohorts, the largest population segment is ages 0-4 (8.6 percent), slightly higher than the city-wide figure of 7.6 percent.

The study area also has a greater share of working age individuals ages 18-64 (72.3 percent) than does the city as a whole (67.9 percent).

The population of people 65 years and over within the study area is also higher (10.6 percent) than the city as a whole (9.4 percent).

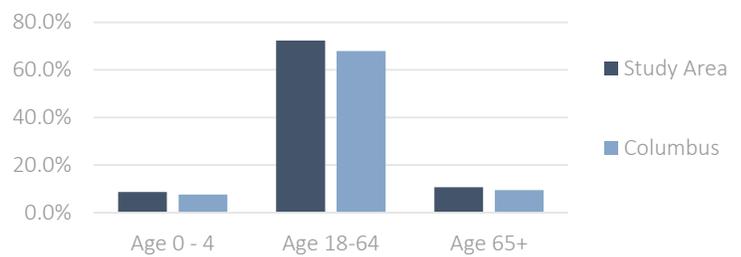
Population density within the study area generally declines from east to west, with a larger population of more economically challenged households concentrated in an area bounded by Broad Street., Hague Avenue, Sullivant Avenue, and Oakley Avenue.

College educated individuals are clustered in the neighborhood between Broad Street and Sullivant Avenue, between Derrer Road to the west and Roys Avenue to the east.



The Hilltop trade area – an area from which most businesses will draw 70 to 80 percent of their customers – is outlined in blue.

AGE DISTRIBUTION (STUDY AREA VS CITY)



College-educated individuals within Study Area (Darker Areas = Higher percent of college-educated)

Race and Ethnicity

The overall breakdown of races in the study area is different than that of the city, with a larger share of white residents (72 percent) than the city as a whole (61.1 percent) and a lower share of black or African American residents (16 percent) than the city as a whole (28 percent).

The races are not evenly distributed across the area, however, with a larger white population found in the eastern portion of the Broad Street and Sullivant Avenue corridors. Black or African American residents make up a larger percentage of the population in the neighborhoods to the east, as well as in the Holly Hill neighborhood south of Sullivant. The percentage of Asian residents in the study area is much lower (2.0 percent) than for the city as a whole (4.9 percent) while the percentage of American Indian (1.0 percent) is higher than the city-wide figure of 0.2 percent.

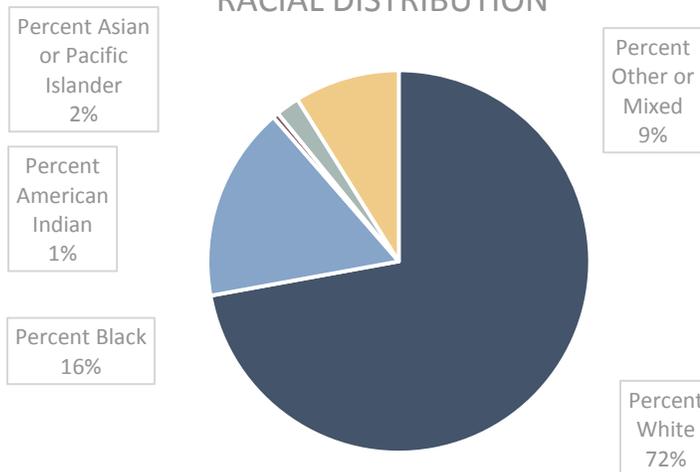
Within the study area, the Hispanic or Latino population is 6,513, or 8.3 percent of the total. Citywide, Hispanics or Latinos make up just 5.6 percent of the total population. The Hispanic or Latino population can be of any race and make up a larger percentage of the population in the western portion of the study area adjacent Broad Street west of Wilson Road on both sides of I-270.

Households & Income

There are 30,261 households within the study area, composing about nine percent of the total households in Columbus. Of these, 61.7 percent of households are families, while 38.3 percent are non-families. Citywide, 53.1 percent of households are families while 46.9 percent are non-families.

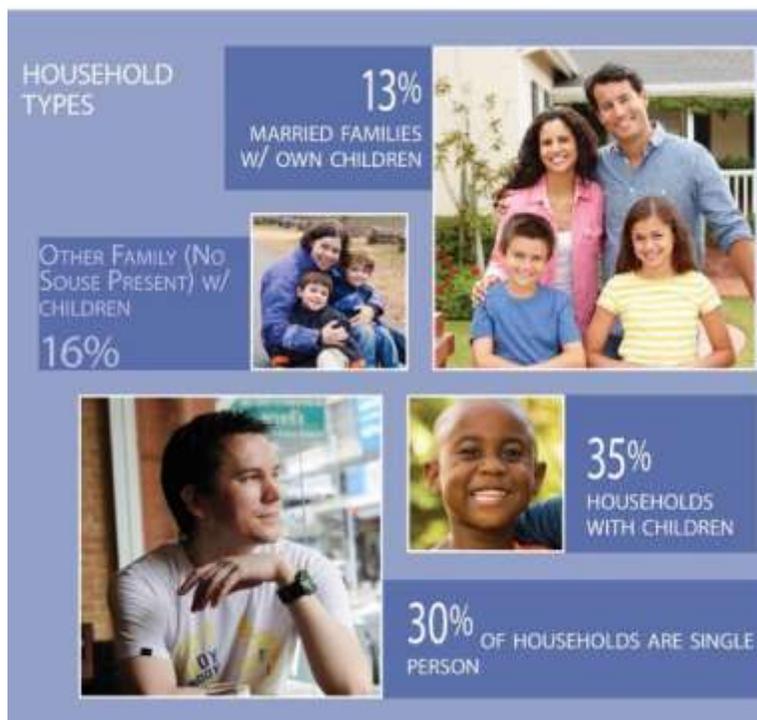
Only 13 percent of households are married families with children, which is similar to the city as

RACIAL DISTRIBUTION



a whole (13.8 percent). Other family households with children (no spouse present) make up 16 percent of all households, whereas city-wide such households make up only 12.1 percent of the total. Within the study area 35 percent of households have children under the age of 18 living at home, higher than the city-wide figure of 29.1 percent. Single person households make up 29.8 percent of the total, compared with 35.1 percent citywide.

Twenty-one percent of households have at least one senior citi-



zen (over 65 years of age) living in them. In general, older households are found in the western and southern portions of the study area.

There are currently estimated to be 14,240 owner-occupied housing units, while there are 16,020 renters. Population losses are projected to be greater among households that are renting. As a result, and barring changes to the trend, between 2023 and 2024 the number of owner occupied homes is expected to exceed the number of renters.

There is an uneven distribution of owner-occupied and renter-occupied housing units within the study area. Rental housing is concentrated in both the eastern portion of the study area and to the north of Broad Street.



Areas shown in green represent rental housing, while orange includes owner occupied and non-residential parcels.

The mean or “average” household income is \$42,306, however household incomes are highly variable across the market study area and among different age cohorts, with 35 percent of households living below the poverty level. At one end of the spectrum, one fifth of households get by on less than \$15,000 per year, while at the other end 17 percent earn \$75,000 or more.

Despite the fact that 35 percent of households are below the poverty level, the data shows that only 8.2 percent receive public assistance income while 32.4 percent receive SNAP benefits (food stamps).

Distributed by age, the highest incomes are earned among households headed by person from 25 to 44 years of age, followed by persons from 45 to 64. The lowest income group are people 65 and older, many of whom are no longer working and are living on Social Security, pensions, and other retirement benefits.



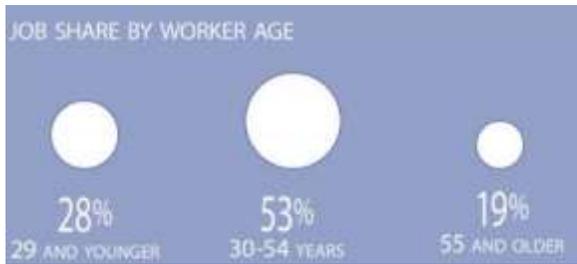
Geographically, median household incomes vary across the study area, with lower household incomes generally concentrated in the eastern portion of the study area. Looking ahead, median household incomes within the study area are forecasted to increase from \$42,306 in 2018 to \$51,931 in 2022.

Employment

The presence of a large daytime population of workers will have implications for consumer expenditures. Secondly, it also contributes to the desirability of the neighborhood by offering jobs to people living nearby, either in primary industries or in the businesses that serve them and their employees. People working in area businesses make up about a third of the poten-

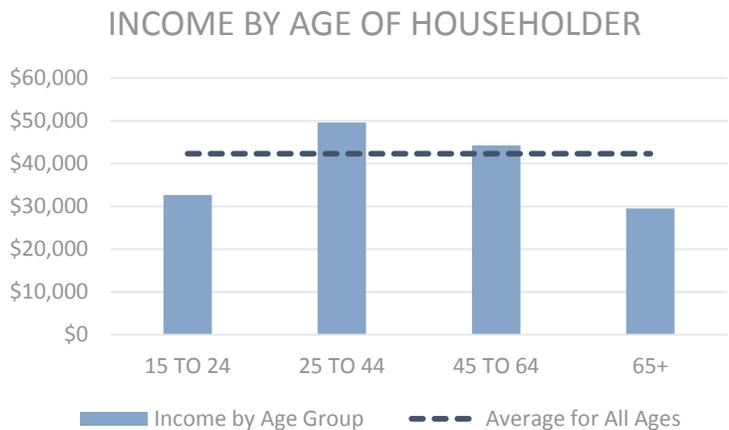


This map depicts where jobs are located within 1.5 miles of the Broad Street and Sullivant Avenue corridors. More than 40,000 people work in this area, and a majority are commuting in from elsewhere in the Columbus region.

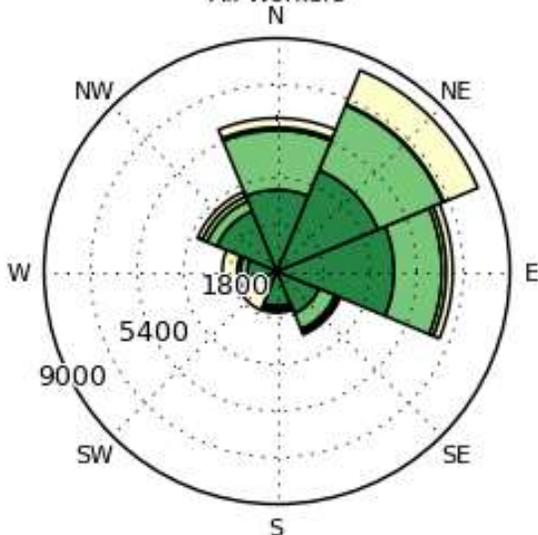


tial spending on retail goods and services, and 45 percent of the potential for dining out.

According to the US Census Bureau, the number of primary jobs in the study area increased



Job Counts by Distance/Direction in 2015
All Workers



from 16,914 to 32,417 between 2005 and 2015. This reflects new jobs created with the opening of the Hollywood Casino Columbus in 2012.

The greatest share of workers are those between the ages of 30 and 54. Twenty-eight percent of workers are age 29 or younger, while 19 percent are age 55 or older.

In terms of earnings, 24 percent of jobs pay \$1,250 per month or less, 45 percent pay between \$1,251 and \$3,333 per month, and 19 percent pay more than \$3,333 per month. The greatest

This chart depicts the distance and direction from which the area is drawing workers.

share of jobs by sector include health care and social assistance (13 percent), followed by retail trade (12 percent), administration and support (10 percent), accommodation and food service (10 percent), and manufacturing (8.5 percent).

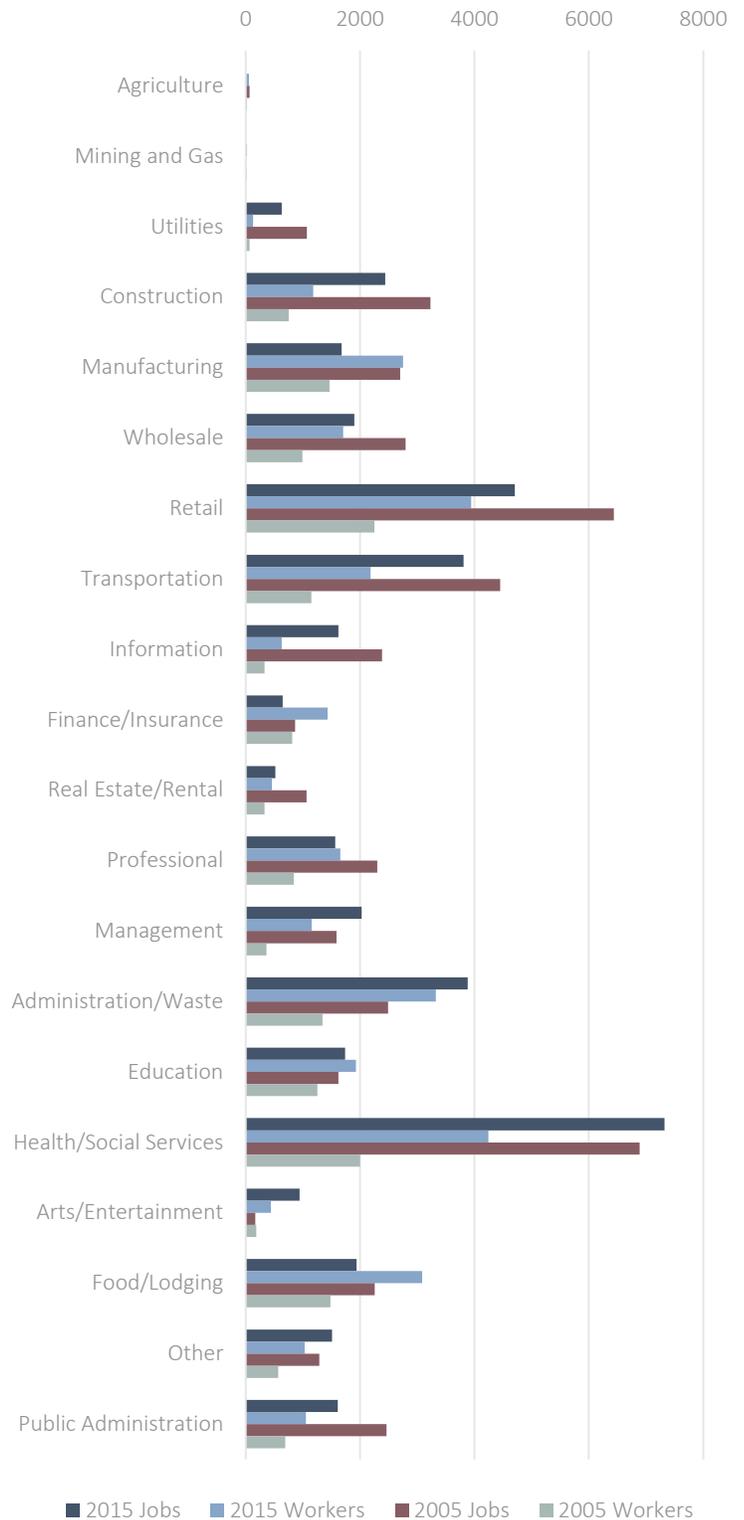
Given the relatively low levels of educational attainment found within the study area, it is somewhat surprising that over 42 percent of jobs require some college, an associate degree, bachelor’s degree, or advanced degree. This may partially explain the fact that only 12 percent of the area’s workers both live and work in the study area, while over 89 percent of workers in the study area commute in from elsewhere in the region. The greatest inflow of workers comes from the northeast Columbus metro area. Of the internal study area jobs filled by outside workers, 46 percent pay more than \$3,333 per month.

There is some mismatch between the jobs available in the area, and the industry in which people living in the area are employed. The gap is presently most pronounced in industries like construction, manufacturing, transportation, information, health and social services, and food and lodging. Over time, the gap between jobs available and workers living in the area has closed, especially within construction, wholesale trade, retail, transportation, health and social services, and public administration. The area did lose nearly 5,000 jobs between 2005 and 2015.

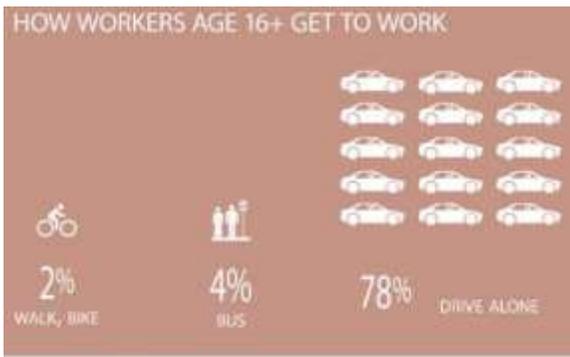
Access and Mobility

The Broad Street and Sullivant Avenue corridors have an advantageous location, with the central business district two miles to the east and Hollywood Casino Columbus and several large employers to the west and north. Both of these neighbors are significant regional employment centers, placing jobs in close proximity to residents of the area. Additionally, Interstate 270 and Interstate 70 support a large con-

JOBS AND WORKERS IN THE STUDY AREA

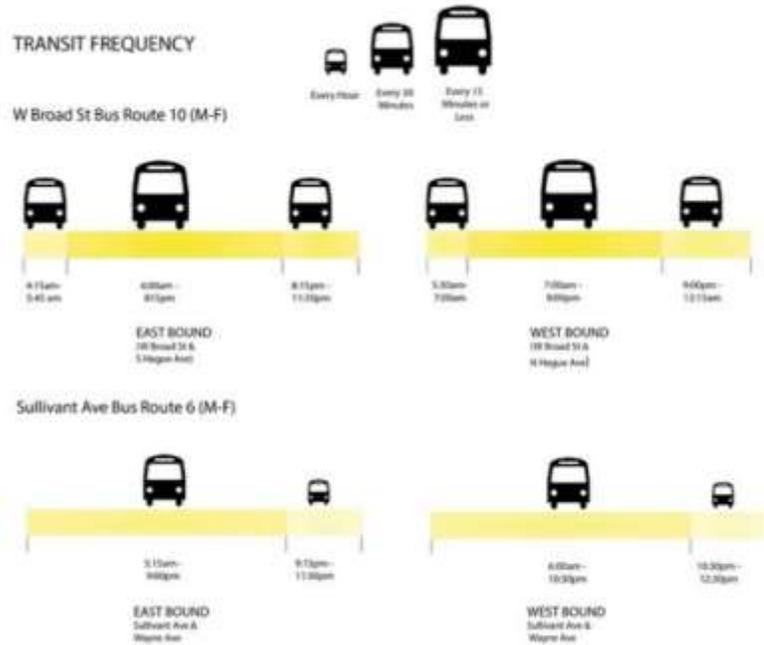


This chart depicts the number of jobs located within the study area in both 2005 and 2015, and the number of workers living in the study area in those same years, broken out by the industry in which they are employed.



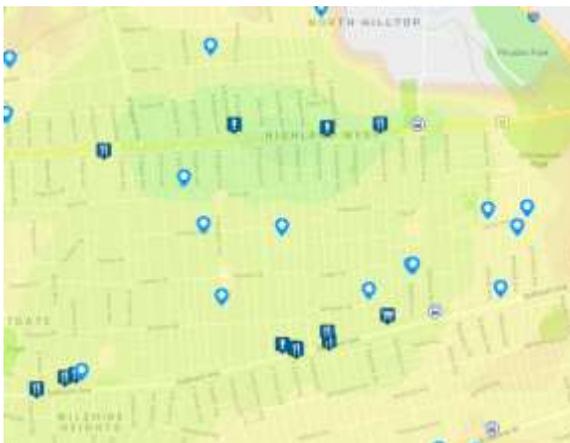
centration of office, manufacturing, distribution, retail, dining, and entertainment employment, centered on key interchanges with Georgesville Road, Broad Street (on both I-70 and I-270), and Wilson Road.

From a transportation standpoint, the study area is exceptionally well connected to the region through I-270, I-70, and US 40 (Broad Street). Internally, the area is defined by a grid street pattern. Broad Street and Sullivant Avenue are the primary east-west routes, while Wilson Road and Hague Avenue carry the most significant north-south traffic. The area is also very well-served by public transit. Transit frequency for Route 10 along Broad Street is typically every 10 to 15 minutes except for early morning and late evening. Transit frequency along Route 6 (Sullivant Avenue) is typically every 30 minutes.

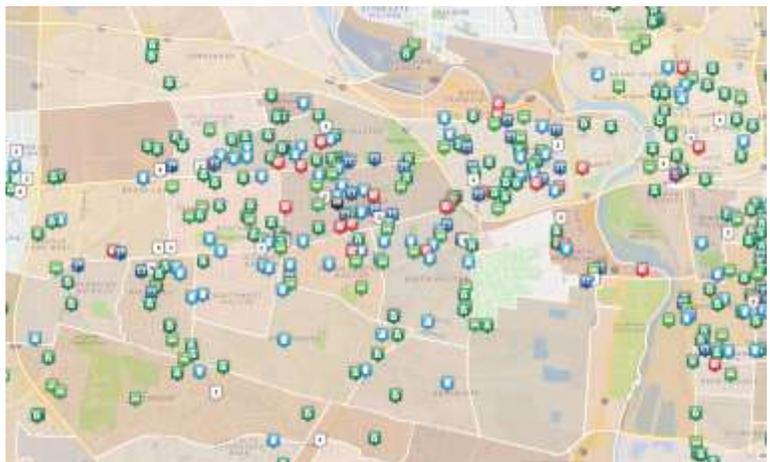


Despite a very good public transit system, a majority of workers within the market study area drive alone to work (78 percent), while 4 percent take the bus and 2 percent walk or bike.

The study area scores well for walkability, especially along the Broad Street corridor between Highland Avenue and Hague Avenue.



Areas shaded in green receive a higher walkability score.



Reported crimes from June 2017 to June 2018, City of Columbus Police Department

Crime

Crime is one of the areas of concern within the Hilltop. One recent newspaper article about the adjacent Franklinton Neighborhood observed that as it has started to gentrify, criminal activity has moved up the hill to the Hilltop area. Statistics from the City's police department do show a concentration of crime that directly affects Broad Street, Sullivant Avenue, and nearby residential areas. Perceptions that an area is unsafe are one of the greatest challenges to bringing in new residents, or business patrons from outside of the immediate area.

Patterns of Use

Data is now available that offers new insight into how people spend time in an area. Much of this is based on cell phone tracking. Google Analytics provides insight into the time of day during which people patronize businesses. Uber-Media Vista is an application that shows the spatial pattern of where visitors are traveling.

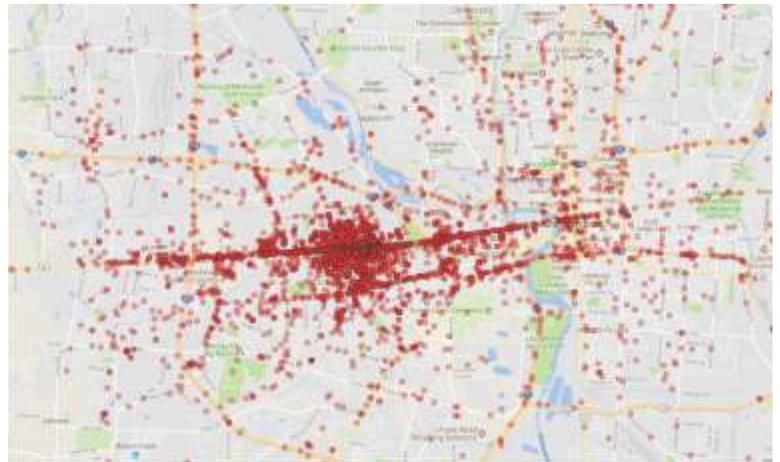
Busy times of the day vary among the businesses for which information is available, however, there is a later afternoon to early evening peak for many (Auto Zone, Family Dollar, Sunoco, Marathon, Walgreen's, Discount Fashion Warehouse). Other see a peak around late morning to early afternoon (Auto Zone, Roy's Appliances, Mobil, Friend's Pharmacy, Third Way Café, Chase Bank). Some businesses see their most traffic at other times.

Cell phone data shows that the Broad Street district in the Hilltop Neighborhood does draw visitors from all over the Columbus metropolitan area. The data are for visitors to businesses on Broad Street, from Hague Avenue to Wheatland Avenue, during a one year period from June of 2017 through May of 2018.

People who have visited at least six times during the year may be considered routine users.

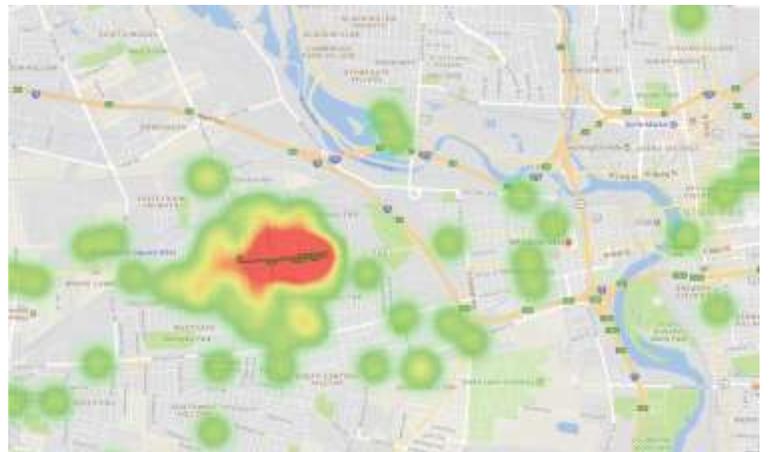
These people are drawn from a smaller area roughly corresponding to the trade area that was used in the market analysis. It is possible to look at their usual daytime (work) location as well as their usual night (home) location, on both week days and weekends. Among these more frequent users, there is little variation in the dominant locations from which visitors are drawn.

When all users are considered (including those who may have only entered the area once during the past year) the distribution is extended across the metropolitan area. The most significant difference between days and times is that on weekend evenings, the district draws fewer people from north of Interstate 70 than it does during the week. Compared to more frequent visitors, there is a larger area around the corridor from



Dots on the map above represent the location of the cell phone user two hours before visiting the commercial district on Broad Street, between Hague Avenue and Wheatland Avenue. The data is a sample of all weekday visitors from June 2017 through the end of May 2018.

The map below depicts the areas from which the same Broad Street district drew a sample of individuals who visited at least six times during the past year. This is more representative of the areas from which the district regularly draws people.



which it is likely to draw visitors.

Building / Property Conditions

It is a generalization to say that commercial properties on Broad Street and on Sullivant Avenue tend to be minimally maintained. Over the past five years, for instance, there have been no more than a handful of commercial building permits drawn in those corridors. There are several instances of buildings showing a need for repairs. Many more have received past alterations that detract from their appearance. There are even a few instances of commercial buildings that are boarded up.

There are some newer and well maintained buildings in the district. These tend to be chain stores and office buildings. In fact, the Family Dollar store on Broad Street is a good model of an urban chain store.

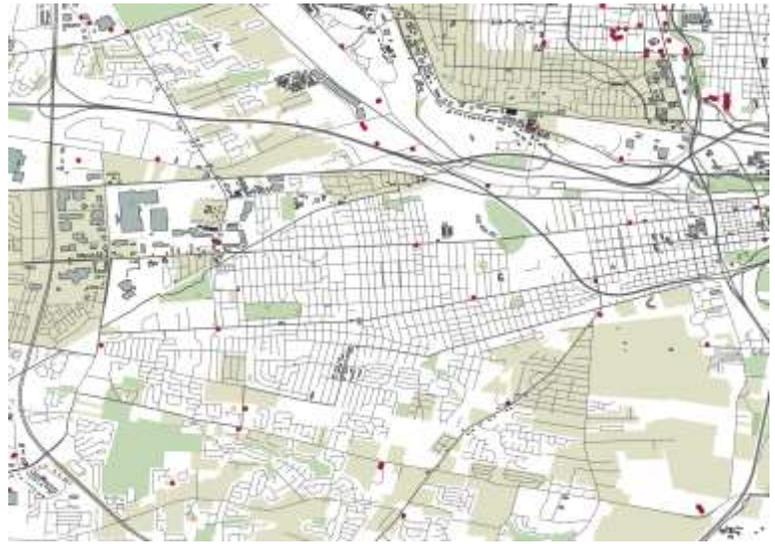
Housing conditions are more mixed than they are for commercial buildings. There are properties, particularly in the western end of the neighborhood, that have been well kept or improved, and present a very attractive appearance. At the same time, low values discourage investment, and older properties tend to need more expensive maintenance and repairs. This has led to a great number of foreclosures and abandoned properties in the neighborhood, particularly east of Hague Avenue.

The City of Columbus has acquired a large number of these vacant homes and has demolished many, leaving behind lots that can be redeveloped if market conditions improve. In the meantime, the loss of so much housing is contributing to population losses in the trade area.

Key Issues and Opportunities

There are several assets, or strengths, which the community can leverage in its efforts to revitalize the Broad Street and Sullivant Avenue corridors. These include:

- **Employment base.** There are more than 40,000 jobs in close proximity to the two corridors, and despite a decline in the decade to 2015, the area remains an attractive location for manufacturing and distribution. About nine in ten workers are commuting into the area from elsewhere in the region, adding to the market potential that can be tapped in the Hilltop.
- **Proximity to downtown.** Downtown is becoming a trendy place to live, work, and play. People living in the Hilltop can be downtown in ten minutes at almost



Nonresidential building permits issued from 2014 to 2018.



City-owned parcels

any time of the day. Already, gentrification is moving across the river into the Franklinton Neighborhood, and in time will work its way up the hill.

- **Affordability.** The low cost of space, whether commercial or residential, is an advantage for the Hilltop. It is an area where low income persons can afford not just to rent, but to buy a home, adding stability and creating wealth. Startup businesses can also find affordable commercial space. The challenge will be to provide the funding for needed improvements to both property types.

- **Traffic patterns.** Broad Street, and to a lesser extent, Sullivant Avenue, have strong traffic that can support many business activities. The pattern of streets and highways, and presence of frequent transit mean that the district is easily accessible from most parts of the city.
- **Hollywood Casino.** The casino is a draw and has the potential to anchor a more substantial entertainment and shopping complex. While west of the study area, a significant attraction will create more traffic for Broad Street in particular.
- **City-owned property.** While the loss of housing is a problem, the large number of lots now owned by the City of Columbus are a base from which to assemble larger, more attractive parcels for redevelopment.
- **Population losses.** The trade area lost about 5,000 residents over the last five years. As families are the majority of those leaving, and the remaining population ages, the losses are now projected to accelerate. With fewer residents, the area's commercial districts can support fewer businesses that serve them.
- **Crime.** High rates of crime will keep people from visiting or stopping in the Hilltop, and will persuade potential renters or home buyers to look in other neighborhoods. Businesses also deal with the challenges of crime, including theft and damage to property or vehicles, and the safety of their employees. This will make many of them hesitant to locate in the two districts.
- **Westland Mall.** Although not in the study area, Westland Mall has a negative impact on the Hilltop. It is a very visible eyesore and sets a perception at the gateway to the Hilltop Neighborhood. The low property values and rents that it helps to create at nearby properties will help to lure businesses to those area, that might otherwise choose Broad Street or Sullivant Avenue.

There are also a number of issues that are going to present great challenges, working against efforts to rehabilitate the area. These include:

Market Analysis

The market analysis was completed in May of 2018. The methodology employed several steps to ensure accuracy:

- A complete business inventory was prepared by driving and walking the districts, compiling a list of the commercial businesses. Several were visited at this time to gather additional information used to prepare sales estimates.
- The trade area was defined using a combination of cell phone tracking data, physical features of the area, and observations of the neighborhoods.
- Census data was gathered for the trade area, to describe the population, income, and other characteristics.
- Projections were developed using a cohort-component method, and fertility and mortality rates for Franklin County.
- Trade area expenditures were estimated using the population (estimate or projection), and product line spend information from the Consumer Expenditure Survey (CES) indexed to age, race, and income.
- Product line expenditures were allocated to store type using line item shares reported in the 2012 Economic Census.

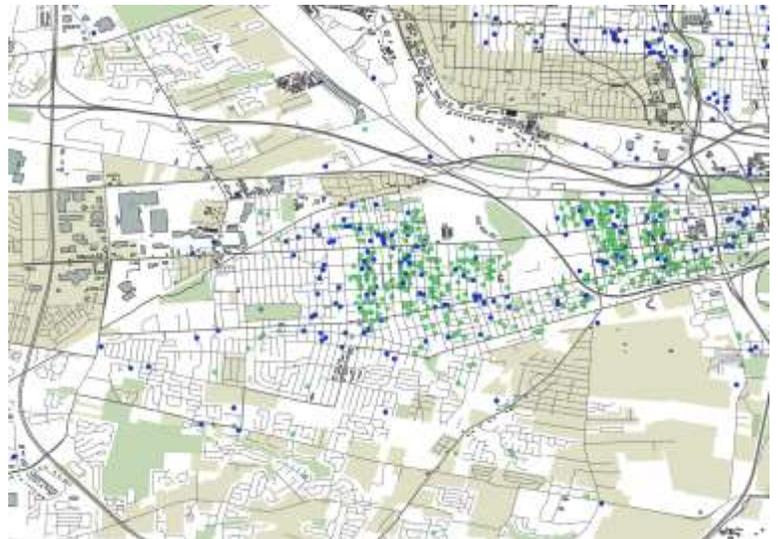
The Greater Hilltop area has a very large employment base, and more than 36,000 people commute in to work within 1.5 miles of the two corridors. These workers are an additional opportunity to capture spending to or from work, or over the lunch break. Estimates of demand from these workers were generated by occupational class, using survey data from the International Council of Shopping Centers.

Population Change

The model predicts a sharp and sustained loss of population from the trade area. This is consistent with Census data for prior years. It is important to note, though, that while more complex than a straight-line method, the projections do reflect current trends. Events like a transformation of the area housing stock and new construction can alter those trends.

A closer look at the age composition of the area helps to explain what is occurring. In the most recent year for which there is Census data (2016) the largest age groups within the population are between 20 and 35 years. Moving forward, these age cohorts become less significant. There certainly is an aging of the population, as seen in most places, but even more striking is the decrease in children.

To sum it up, this is an area that is not attracting new residents. Especially, it is not attracting families. As the area population becomes older and more heavily made up of childless singles and couples, the population is shrinking. Those losses are concentrated in households that are renting.



Demolition permits issued from 2014 to 2018. Green indicates single family residential, blue is all others.

Housing Market

Because the population of the Hilltop and surrounding neighborhoods is projected to decline, there is a corresponding decline in demand for housing. The analysis projects an annual loss averaging 518 households.

As already noted, many single and multi-family homes have been demolished in recent years. There are currently a great number of unoccupied homes in the Hilltop and Franklinton neighborhoods. Most of these have been boarded up and detract considerably from perceptions of the area. In general, the housing stock is mixed in quality. The preponderance of homes are nondescript “worker housing” from the early to mid-1900’s. Newer, and usually better maintained homes are found in the western part of the neighborhood.

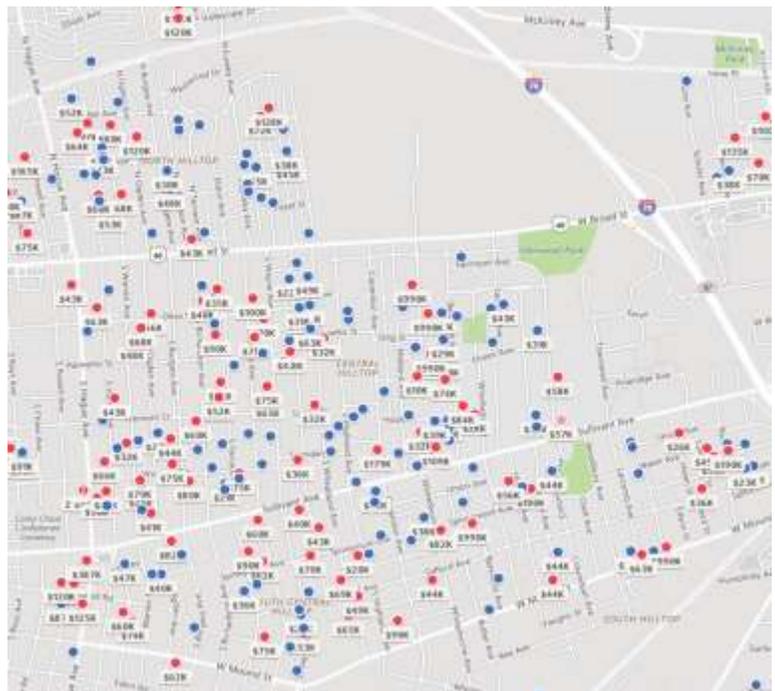
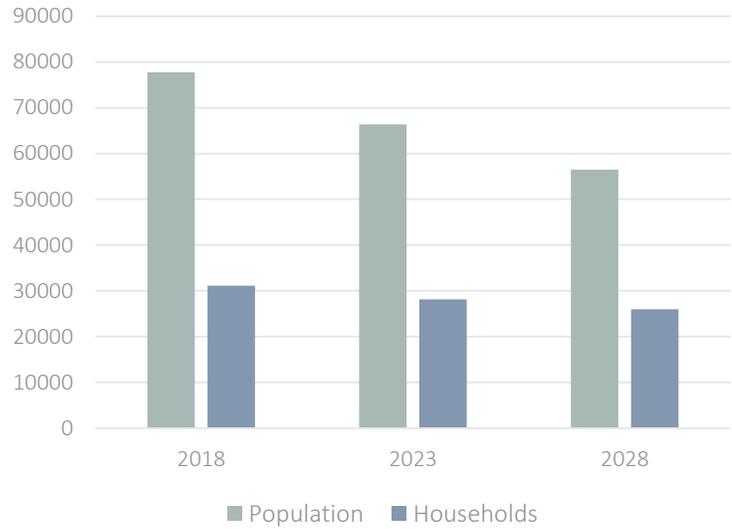
Home Sales

Columbus has a strong housing market coming out of the Great Recession. The number of sales, home prices, and total dollar volume have increased in most years. In 2017 there were 32,218 sales with a median price of \$181,500, according to the Columbus Realtors Association. That came to an average of \$118.67 per square foot. On average, homes spent 33 days on market until sale.

There are presently 555 homes listed for sale within the trade area defined for this analysis, which includes Greater Hilltop. Of these, 438 are in a foreclosure or pre-foreclosure status, or being sold at auction. This is about 29.2 percent of the total inventory in Franklin County, in the first quarter of 2018.

The remainder of available homes in the trade area are priced from \$19,999 to \$149,900. Time on market varies, with the longest non-foreclosure property listed for 305 days. About 80 percent of the homes in the area have been

PROJECTED CHANGE IN POPULATION AND HOUSEHOLDS



Zillow map of homes currently listed in the core of the Hilltop area.

listed for more than the market average of 33 days.

The largest concentration of homes on the market is within an area bounded by I-70 on the east, the railroad on the north, Hague Avenue on the west, and Mound Street on the south. This is also an area in which sales prices are among the lowest. There is an appreciable increase in listing prices west of Hague

Avenue, where homes are valued at about two times those to the east. Prices are generally the same in Franklinton as in the eastern part of the Hilltop neighborhood. There is a dramatic increase in prices across the river, in the downtown.

From a home buyer or investor perspective, the Greater Hilltop Neighborhood appears to be a financial risk. The number of vacant and boarded properties, and homes in foreclosure, work to depress values. Investments in home upgrades, which are necessary to improve the quality of the housing stock and attract buyers or renters, are not likely to be recaptured under

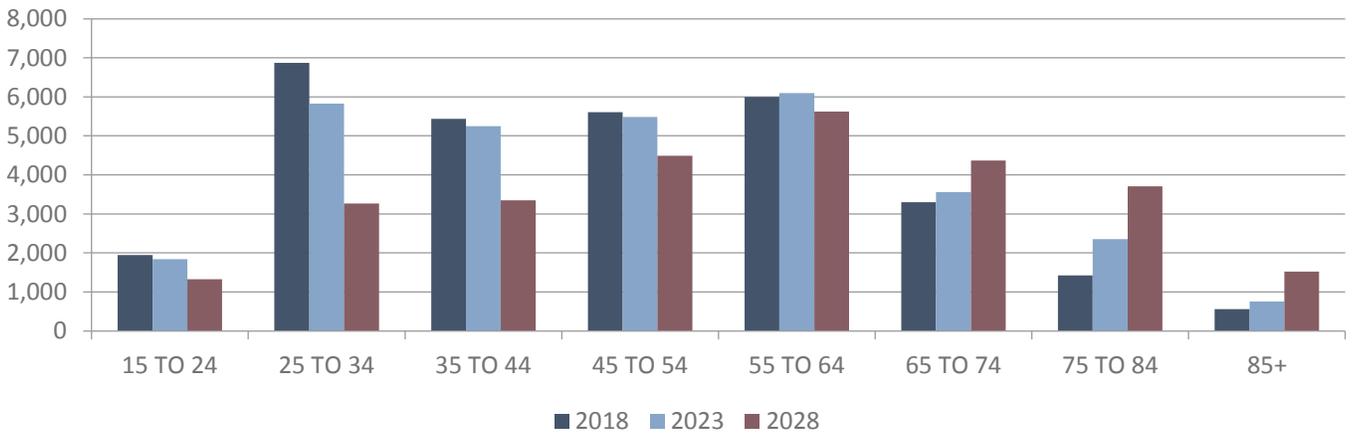
these conditions.

The Hilltop Neighborhood has some positive attributes. There are more than 40,000 jobs within a mile and a half of the Broad Street and Sullivant Street corridors. Downtown Columbus, with its many amenities, is only two miles away, and the neighborhood is very accessible. Housing is not dissimilar from more stable city neighborhoods. Still, other forces have driven the housing market into a prolonged slide.

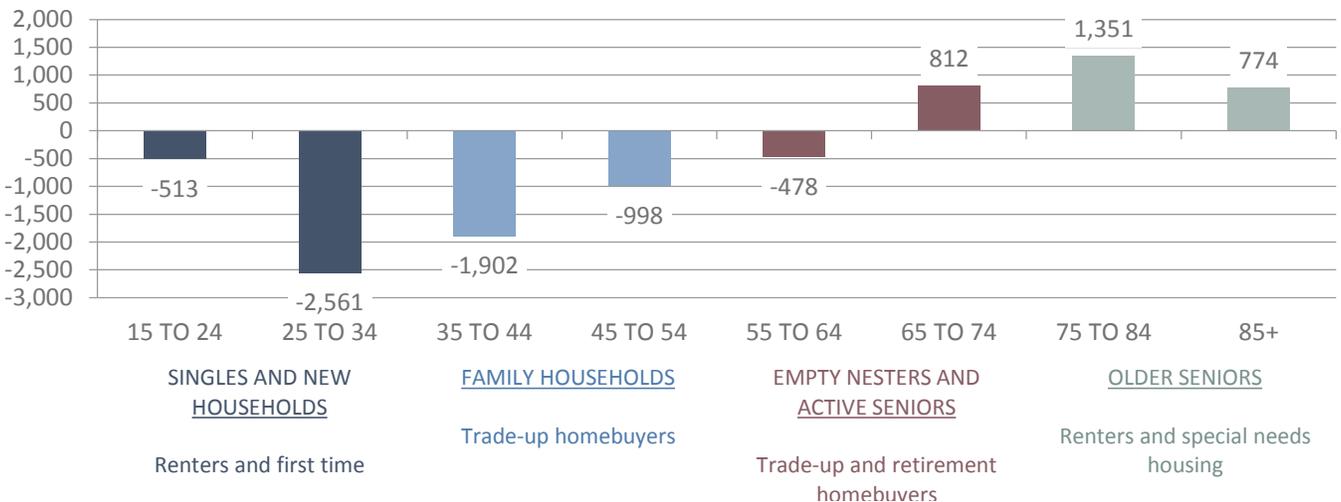
Rentals

Rentals make up a little over half of the housing units in the trade area. Over time, this is anticipated to change as large numbers of renters are projected to move out of these neighborhoods, while fewer owners will leave. Much of that rental

PROJECTED HOUSEHOLDS BY AGE OF HOUSEHOLDER



PROJECTED CHANGE IN HOUSEHOLDS BY STAGE



housing faces the risk of being abandoned or foreclosed as fewer people are available to rent vacant units.

Trulia estimates that the average rent in Columbus is \$1,200 per month, for properties that are currently available to lease. This ranges from \$779 for a one bedroom unit, to \$989 for a two bedroom unit, and \$1,150 for a three bedroom unit. Four bedroom units, often single family homes, bring the average up. They are renting for \$1,500 per month. The most common property now on the market has three bedrooms (508 of 900 available properties).

Rents are somewhat lower in the Hilltop Neighborhood and surrounding parts of the trade area. East of Hague Avenue, Trulia estimates them to be from \$225 to \$250 per bedroom. West of Hague Avenue they are \$300 to \$330 per bedroom. This provides a range of \$450 to \$660 for a two bedroom apartment, or roughly half to two-thirds of the prevailing rent elsewhere in the city. As with owned housing in the area, there is a disincentive to investment. Many of these older properties will have high maintenance costs that may not be covered with the lower rental income attainable in much of the area.

Outlook

Housing is a central challenge of the Hilltop Neighborhood. The outflow of residents is causing the population to drop, meaning there is less spending to support local businesses. Because housing is cheap, it is attracting lower income households that have less money to spend. The many vacant homes and foreclosures contribute to negative perceptions that deter people from other parts of the Columbus region from coming into the area. They may also provide a refuge for homeless people and harbor criminal activity that further deters visitors. Changing that scenario is going to be es-



A typical residential street east of Hague Avenue.

sential to bringing vitality back to Broad Street and Sullivant Avenue.

Already, some change can be seen in the Franklinton Neighborhood to the east. As this area begins to gentrify it will begin to put pressure on the Hilltop Neighborhood. While Franklinton has old warehouses to convert to housing, and is planning redevelopment with mixed use buildings, multifamily structures, and rowhouses, a different approach might be considered for the Hilltop. Always a place for working class and middle income households, the Hilltop may look to fill in its vacant lots with new, small to mid-sized detached homes.

Affordability and location are the two principle advantages that the neighborhood has to reverse the housing decline. The City and its partners may focus on two initiatives: 1) to stabilize and shore up conditions west of Hague Avenue, where the market is stronger; and 2) to make a concerted push to clean up areas east of Hague Avenue, remove derelict buildings, and assemble parcels for redevelopment.

Retail Market

Although the Hilltop's trade area has a low income population, there are estimated to be 77,789 people living within it. This is a good number, but the rate of loss is a chilling one to many retailers who might otherwise consider the area. Without chang-

es to the current pace, the area will lose about 20,000 residents – a little over a quarter of the total – in the coming decade. Especially when decisions are made in distant corporate offices, the combination of low incomes and population losses is read as an indicator of a dying market. That perception is reinforced when anchors like Target pull out.

Market Potential

Residents of the area are expected to annually spend \$413,060,000 on retail goods, divided among 58 retail store types. Not all of these are represented in the Broad Street and Sullivant Avenue corridors.

In addition to residents, workers in the area also make purchases that can be captured in these districts. Worker spending is concentrated in retail categories like food, gasoline, health care (pharmacies), and general merchandise, along with eating and drinking establishments. More than 40,000 people work within 1.5 miles of the two corridors, and 90.5 percent of them live elsewhere. These workers are estimated to spend \$173,447,000 during their work day.

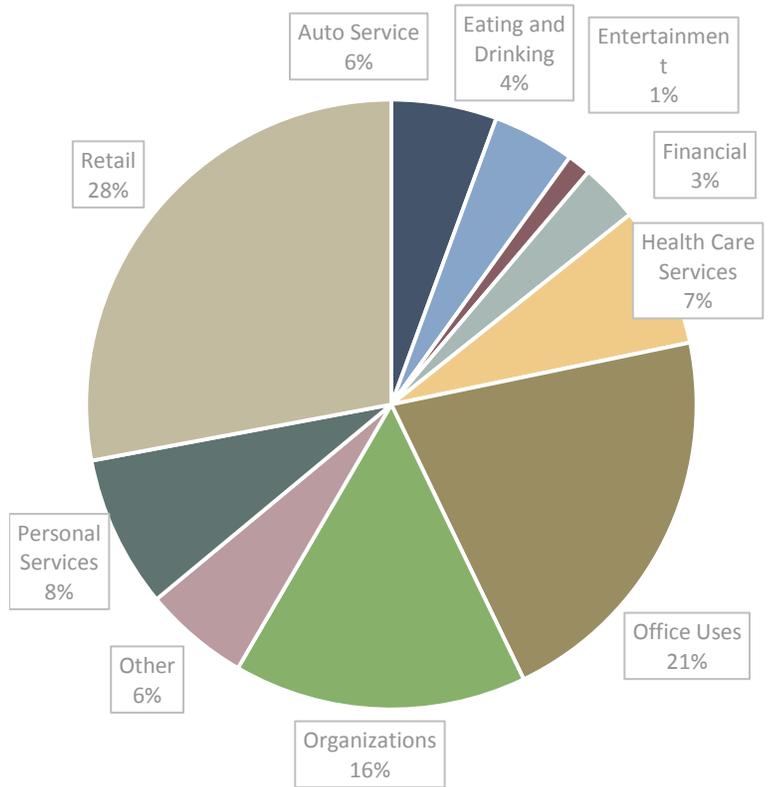
Broad Street Corridor

Broad Street in the Hilltop Neighborhood is a significant commercial area with an estimated 956,626 square feet of ground level commercial space on about 91.93 acres, including retail, dining, office, garage, religious, and other uses. About a third of the total space is within the Great Western Shopping Center. About 167,107 square feet of space, or 17.3 percent of the total, is presently vacant. Again, much of this is in the Great Western Shopping Center.

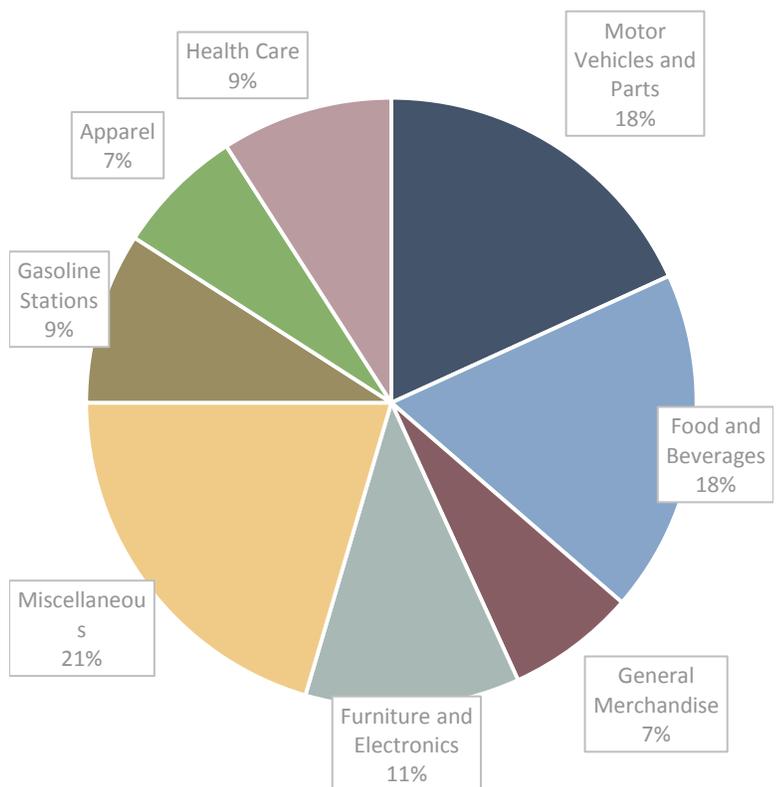
When counted in May of 2018, there were 157 businesses in the Broad Street Corridor. The largest number of these were retail operations, followed by office uses and organizations. This latter category includes churches, educational and social service organizations, and others.

The other category is used to describe businesses that do not

BROAD STREET BUSINESSES BY TYPE



RETAIL BUSINESSES BY TYPE



serve a household consumer, such as wholesalers, building services, trades, light manufacturing, and similar uses.

Retail uses in the corridor are largely those that are scaled to a neighborhood. The typical anchors of a neighborhood center are grocery stores, pharmacies, hardware stores, and dollar stores. The Broad Street corridor contains both pharmacies and dollar stores, and recently lost its hardware store. A full-line grocery (Kroger) is located immediately west of the study area.

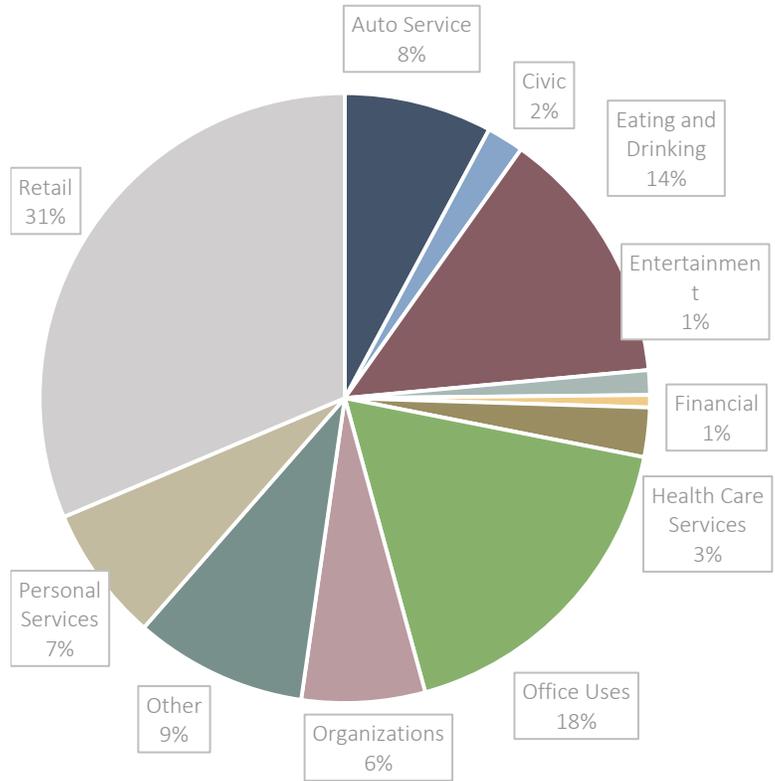
Total retail sales in the district are estimated at \$46,633,000, from 259,409 square feet of floor area. This comes to \$180 per square foot. According to CoStar, the average sales per square foot for US retailers is about \$325, in which case, businesses in the Broad Street corridor are underperforming compared to their peers. This is not unexpected, given the preponderance of independent businesses, the smaller than average size of several chain stores, and the low income within the trade area.

Sullivant Avenue Corridor

Sullivant Avenue has 1,003,538 square feet of non-residential space on 111.6 acres, though a significant part of this total includes industrial and civic functions. Included in that is the former Topp’s (later Rink’s) department store that closed in the 1980’s, and is now used for warehousing. The more typical commercial building is a small freestanding building or small strip. In the western part of the district, which was developed in the mid-1900’s, most buildings are a single story and single use, and have at least some associated parking. Parcels are smaller to the east, and some buildings may not have parking, or it may less accessibly located to the rear of the building.

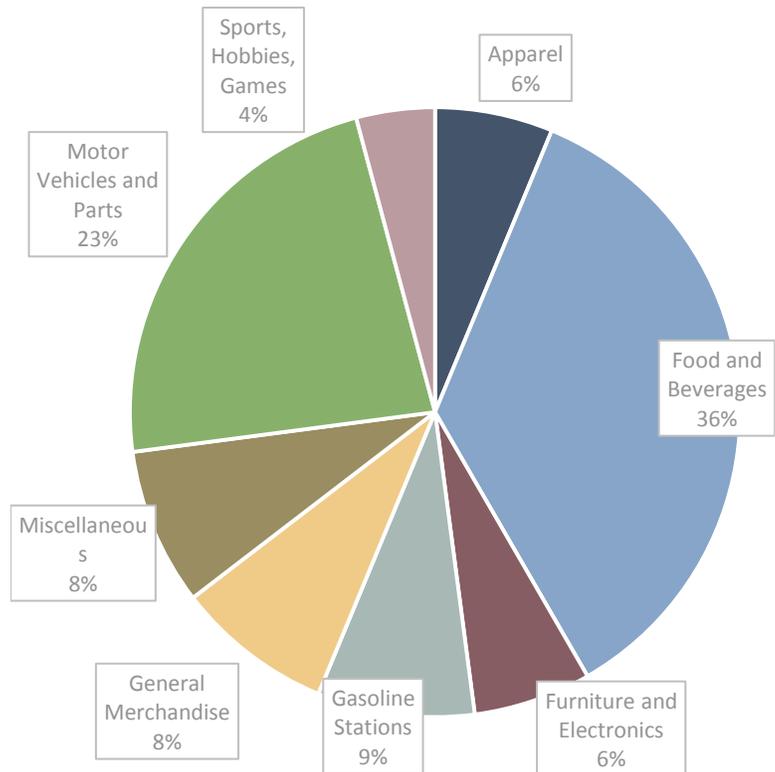
The corridor has a General Dollar and two Family Dollar stores, but lacks other neighborhood-scale anchor uses. Still, it does have more retail, and significantly more eating and drink-

SULLIVANT AVENUE BUSINESSES BY TYPE



ing establishments than are on Broad Street, despite also hav-

RETAIL BUSINESSES BY TYPE



ing less traffic. One reason for this is the willingness of immigrant business owners to set up shop along the corridor. Hispanic, Middle Eastern, and African cultures are represented in the area, particularly in the number of convenience stores and restaurants.

Aside from that, the Sullivant Avenue corridor offers two additional advantages over Broad Street. The first is that most buildings do have their own private parking for customers and employees. The second is that the surrounding residential areas are more stable and have less criminal activity.

Altogether, there are 173 businesses in the Sullivant Avenue corridor. Forty-five of these are retail businesses, with annual sales estimated at \$39,780,000. Despite having more retailers than Broad Street, there are fewer large and chain businesses on Sullivant Avenue, which accounts for the lower aggregate sales figure. With a total floor area of 168,104 square feet, these retailers have an average sales per square foot of \$237, which is better than in the Broad Street corridor, if still below the national average.

Market Performance

The trade area is estimated to have a retail market potential of \$586,507,000, from both residents and commuting workers, combined. Retail businesses in the two corridors are thought to capture \$86,413,000 in aggregate sales.

Alone, residents of the trade area spend \$413,060,000 on retail purchases. Not all of their purchases are made in the Hilltop business districts. This is certainly true where the districts do not have certain types of businesses, but even when they do, residents may prefer to travel to different stores. Overall, the two corridors are thought to capture \$73,011,000 in trade area resident spending. This is 17.7 percent of the total, or a 17.7 percent market

share. The remaining \$13,402,000 in sales are from workers and other visitors to the area.

Broken out among the different retail categories, there are some areas where the districts are performing well. Broad Street and Sullivant Avenue are drawing people from outside of the area for used cars, auto parts, and used merchandise. Still, only 21 of 58 retail store types are represented in the two districts.

Competition

Competition is an important consideration in the market's performance and the ability of Broad Street or Sullivant Avenue to support businesses. Competition has the potential to be an asset as well as a threat. Westland Mall drew people from a large region when it was thriving. Many of its customers would pass through the Broad Street corridor in particular, and would have the opportunity to see and potentially stop at its businesses. When the mall closed, that traffic disappeared.

More often, competition is considered a threat. Any large concentration of businesses nearby can serve to cut off traffic that might travel into a district, or can share a trade area and draw customers from in it. Competition for the Hilltop business districts includes:

- **Broad Street west of I-270.** This area has been impacted by the same trends that closed Westland Mall, though it has some important anchors like Home Depot and Giant Eagle, along with smaller chain stores and franchise restaurants.
- **Georgesville Road west of I-270.** Much of this area is newly developing and it is one of the largest concentrations of retail in the southwest part of Columbus, with a Walmart Supercenter, Lowe's, Kroger, Regal Cinema, and many chain restaurants.
- **Hilliard-Rome Road at I-270.** Though some distance, this is the nearest concentration of big box stores such as Walmart, Meijer, Sam's Club, Kohl's, Marshall's, Target, and many specialty mid-box stores.

Discussion

Demographics are the reason for the Hilltop Neighborhood's downward turn. Nothing will have as much impact as stabilizing and turning around the residential areas surrounding Broad Street and Sullivant Avenue. A shrinking population with grow-

ing number of older, non-family, and low income households will not attract new businesses or sustain the ones already there.

MARKET POTENTIAL, ESTIMATED SALES, MARKET SHARE, AND GAP ANALYSIS

DESCRIPTION	2018			
	TRADE AREA MARKET POTENTIAL	STUDY AREA ESTIMATED SALES	MARKET SHARE OF TRADE AREA	GAP OR (SURPLUS)
New car dealers	\$72,840,000	\$0	0%	\$72,840,000
Used car dealers	\$6,904,000	\$10,814,000		(\$3,910,000)
Recreational vehicle dealers	\$2,281,000	\$0	0%	\$2,281,000
Motorcycle, boat, and other motor vehicle dealers	\$4,957,000	\$350,000	1%	\$4,607,000
Automotive parts and accessories stores	\$4,597,000	\$4,967,000	86%	(\$370,000)
Tire dealers	\$3,059,000	\$1,400,000	37%	\$1,659,000
Furniture stores	\$6,019,000	\$0	0%	\$6,019,000
Floor covering stores	\$2,148,000	\$0	0%	\$2,148,000
Other home furnishings stores	\$3,232,000	\$0	0%	\$3,232,000
Appliance, television, and other electronics stores	\$9,062,000	\$1,025,000	9%	\$8,037,000
Computer and software stores	\$2,146,000	\$80,000	3%	\$2,066,000
Camera and photographic supplies stores	\$404,000	\$0	0%	\$404,000
Home centers	\$14,580,000	\$0	0%	\$14,580,000
Paint and wallpaper stores	\$1,062,000	\$0	0%	\$1,062,000
Hardware stores	\$2,221,000	\$0	0%	\$2,221,000
Other building material dealers	\$13,088,000	\$0	0%	\$13,088,000
Outdoor power equipment stores	\$626,000	\$0	0%	\$626,000
Nursery, garden center, and farm supply stores	\$3,556,000	\$0	0%	\$3,556,000
Supermarkets and other grocery stores	\$50,408,000	\$8,487,000	13%	\$41,921,000
Meat markets	\$582,000	\$0	0%	\$582,000
Fish and seafood markets	\$192,000	\$0	0%	\$192,000
Fruit and vegetable markets	\$358,000	\$0	0%	\$358,000
Other specialty food stores	\$582,000	\$250,000	43%	\$332,000
Beer, wine, and liquor stores	\$3,781,000	\$2,832,000	75%	\$949,000
Pharmacies and drug stores	\$22,244,000	\$6,911,000	31%	\$15,333,000
Cosmetics, beauty supplies, and perfume stores	\$1,099,000	\$20,000	2%	\$1,079,000
Optical goods stores	\$870,000	\$0	0%	\$870,000
Other health and personal care stores	\$1,562,000	\$0	0%	\$1,562,000
Gasoline service stations with convenience stores	\$35,103,000	\$26,882,000	57%	\$8,221,000
Other gasoline stations	\$12,303,000	\$0	0%	\$12,303,000
Men's clothing stores	\$877,000	\$0	0%	\$877,000
Women's clothing stores	\$4,043,000	\$450,000	9%	\$3,593,000
Children's and infant's clothing stores	\$1,120,000	\$0	0%	\$1,120,000
Family clothing stores	\$9,709,000	\$650,000	4%	\$9,059,000
Clothing accessories stores	\$590,000	\$0	0%	\$590,000
Other clothing stores	\$1,135,000	\$0	0%	\$1,135,000
Shoe stores	\$2,717,000	\$0	0%	\$2,717,000

MARKET POTENTIAL, ESTIMATED SALES, MARKET SHARE, AND GAP ANALYSIS (continued)

DESCRIPTION	2018			
	TRADE AREA MARKET POTENTIAL	STUDY AREA ESTIMATED SALES	MARKET SHARE OF TRADE AREA	GAP OR (SURPLUS)
Jewelry stores	\$3,026,000	\$0	0%	\$3,026,000
Luggage and leather goods stores	\$202,000	\$0	0%	\$202,000
Sporting goods stores	\$3,649,000	\$225,000	4%	\$3,424,000
Hobby, toy, and game stores	\$1,807,000	\$0	0%	\$1,807,000
Sewing, needlework, and piece goods stores	\$534,000	\$0	0%	\$534,000
Musical instruments and supplies stores	\$585,000	\$0	0%	\$585,000
Book stores and news dealers	\$1,937,000	\$75,000	2%	\$1,862,000
Prerecorded tape, compact disc, and record stores	\$388,000	\$0	0%	\$388,000
Department stores (excl. discount department stores)	\$8,263,000	\$0	0%	\$8,263,000
Discount department stores	\$14,723,000	\$0	0%	\$14,723,000
Warehouse clubs and supercenters	\$34,002,000	\$0	0%	\$34,002,000
All other general merchandise stores	\$4,690,000	\$3,375,000	63%	\$1,315,000
Florists	\$670,000	\$0	0%	\$670,000
Office supplies and stationery stores	\$2,401,000	\$0	0%	\$2,401,000
Gift, novelty, and souvenir stores	\$1,930,000	\$0	0%	\$1,930,000
Used merchandise stores	\$1,077,000	\$3,383,000		(\$2,306,000)
Pet and pet supplies stores	\$1,208,000	\$50,000	1%	\$1,158,000
Art dealers	\$1,680,000	\$10,000	0%	\$1,670,000
Manufactured (mobile) home dealers	\$69,000	\$0	0%	\$69,000
All other miscellaneous store retailers	\$2,281,000	\$775,000	28%	\$1,506,000
Non-store retailer	\$25,884,000	\$0	0%	\$25,884,000
TOTAL	\$413,060,000	\$73,011,000	14%	\$340,052,000

If the challenges of population can be dealt with, there are opportunities for retail businesses. They may include continued growth of small and independent businesses that can easily occupy existing space in the district. A more ambitious approach may be to assemble larger redevelopment parcels that will be attractive to chain businesses. Typically, at least an acre would be needed to attract uses like a hardware store, pharmacy (CVS), or limited selection grocer (like an Aldi), any of which might build a 20,000 square foot building and parking. Many developers would prefer a larger site to enable

them to build a strip with smaller retail spaces in addition to the anchor tenant.

Other changes would make conditions for revitalization still more favorable. These include suppressing criminal activity, addressing the appearance of private property along both corridors, and launching a campaign to improve perceptions of the Hilltop, just as has been done in Franklinton (formerly The Bottom).

Sullivant Avenue's concentration of international businesses, while not the largest in Columbus, is still significant. It may be possible to work with these businesses on management, prod-

ucts, presentation, and marketing to appeal to a much larger audience, further building and branding the corridor.

Dining Market

Eating and drinking establishments are more densely located along Sullivant Avenue, rather than the more heavily trafficked and central Broad Street. While this may seem counterintuitive, there are several things in play that make this the case. They include the more stable neighborhoods surrounding the Sullivant Avenue study area, a greater number of potential locations with adequate private parking, the number of ethnic restaurants with ties to their respective communities, and the fact that most of these businesses rely on nearby residents and workers, and may not need an arterial road to bring traffic from outside of the area. This latter issue is also a potential limitation on growth.

Market Performance

The trade area generates \$56,969,000 in annual restaurant purchase potential. Workers add another \$34,733,000 in spending, creating a \$91,703,000 market for full service, limited service (fast food and fast casual), snack and beverage (ex., coffee or ice cream), bar or tavern, and other establishments that serve food. These others include cafeterias or buffets, prepared foods purchased in stores like gas stations, and food at nontraditional venues like schools. These other establishments are thought to make up about 16.5 percent of the total.

A third of the potential market for eating and drinking is comprised of workers, mostly making purchases at lunch or on their way to work. This skews spending toward limited service (fast food and similar) restaurants. Expected spending is broken out in three categories:

Full service restaurants..... \$38,472,000

Limited service restaurants..... \$44,015,000
 Other venues \$9,216,000
 Total spending \$91,703,000

Spending at snack and beverage places is included in the total for limited service restaurants.

Currently, restaurants in the Broad Street corridor are thought to capture \$2,780,000 in annual sales, while the Sullivant Avenue corridor captures \$13,548,000 in sales, for a total of \$16,328,000, or 17.8 percent of the total. This is comparable to the percentage of retail sales potential captured by the two districts.

Restaurants on Sullivant Avenue average sales of \$282 per square foot. On Broad Street, the average is \$212 per square foot. Most analysts regard a benchmark of \$250 to \$300 per square foot as a break-even point in the restaurant industry. Lower occupancy costs in this area, as well as less reliance on paid labor at some restaurants, may justify a lower threshold for the Hilltop Neighborhood. Still, there appear to be few restaurants that are truly thriving.

Discussion

Restaurants may be a low-hanging fruit for redevelopment on both Broad Street and Sullivant Avenue. Several considerations come into play.

- Consumers have an interest in good, unique food. Ethnic restaurants on Sullivant Avenue may meet this desire. Efforts are needed to work with businesses to improve quality, appearances, and marketing to an ethnically diverse market. There is an opportunity for new businesses as well as existing ones, in fact, the larger the concentration, the more likely they will be to attract a market.
- Food service has relatively low barriers for business startups, though it also has great challenges for success. There is likely to be a large pool of persons living in the Hilltop area who may be considering a food service business, and the potential to convert others, like food trucks, to a permanent location.
- There is a large market, and only a small portion is being captured in the area. A number of programs pioneered in other communities can help to reach workers and residents to expose them to restaurant businesses in the Hilltop.

- Franchise restaurants require relatively small sites, which are easier to assemble

for redevelopment, than would be the larger sites required for most retailers.

Business and Development Opportunities

There are opportunities for business and real estate development within both the Broad Street and Sullivant Avenue corridors. This element of the study describes those opportunities, including redevelopment and rehabilitation, that should be priorities for the City and its partners to enhance its prospects within the area.

Business Targets

The kinds of businesses that may be attracted to the corridors varies by location. The older portions of both corridors will be more likely to attract independent retail, dining, and service businesses while the newer portions offer more opportunities for chain and franchise businesses along with professional offices. Based on the market analysis and qualities of each area, the following may be considered the prime targets for business development.

Broad Street (East of Hague Avenue)

The small buildings and lots, and walkable urban character of the area has detrimental aspects that make it a more difficult site for chain businesses, while offering some advantages for independent operators. Businesses that will locate in the area will tend to serve neighborhood residents and nearby workers. They include:

- **Restaurants, snack and beverage shops, and drinking places.** Most of these will be oriented to the lunch and evening market. There is a concern that bars can exacerbate issues related to crime and perceptions of the area.
- **Used car dealers.** These frequently seek low cost space like vacant lots in the district, and while they can be successful,

contribute little to lifting the image and prospects of the area.

- **Health and Personal Care Stores.** This can include drug stores, as well as others like cosmetics and beauty supply stores.
- **Convenience stores.** Though the form of the area favors stand-alone convenience stores, redevelopment could open the opportunity for a gas station with convenience store.
- **Used Merchandise Stores.** This a frequent use in similar areas that cater to a low income population. A more interesting potential would be to establish a business in architectural salvage, given the number of tear-downs in the vicinity, and which would draw a different market.
- **Personal Services.** This is another business type with a low cost of entry. Examples include hair and nail care, child and adult day care, and laundromats. These businesses meet the needs of the neighborhood population

Although not part of the study area, the south side of Broad Street, from Whitethorne Avenue to Lechner Avenue, is a nearby area that could be a good candidate for redevelopment. This area has the advantages of being across from the state office buildings, at the I-70 interchange, and accessible to the gentrifying Franklinton neighborhood.

Redevelopment at this location could accommodate small strips or standalone businesses similar to the AutoZone at Whitethorne Avenue. Gas stations and convenience stores, drug stores, hardware stores, and fast food restaurants could find this location appealing. New commercial development and chain anchors would have a positive impact on the nearby study area.

Broad Street (West of Hague Avenue)

Larger lots enabled more auto-oriented development to occur west of Hague Avenue. Buildings on these sites are often larger and have some private parking. Additionally, residential districts in this portion of the study area are considerably healthier than those further east. Among existing businesses in the area, there are even two potential expansion opportunities.

- **Walgreens.** The Existing Walgreens is considerably smaller than the current prototype for the chain. There may be an opportunity to work with the chain to expand at the existing location or to construct a new store in the same vicinity. The existing site most appropriately meets their needs for a primary intersection and the “going home” side of the street.
- **Gas Stations.** Although there are several gas stations in the corridor (Save Way Mini-Mart, Mobil, Sunoco, Marathon, Certified Oil), none are designed to a modern standard which would include a sizable convenience store, and for some, additional pumps. There may be an opportunity to redevelop and expand one or more of these businesses.

The character of this stretch of the corridor makes it better suited to accommodate chain businesses (and franchises), which are usually larger than their independent counterparts. These businesses will also require parking and signage that can be provided on the larger sites in this area. Some of the businesses that may be considered for recruitment, in addition to those listed for the eastern part of the corridor, include:

- **Hardware Stores.** This section of Broad Street is positioned to intercept traffic headed toward Home Depot, originating in the Hilltop, Franklinton, downtown, and other neighborhoods. There is little nearby competition.
- **Drug Stores.** Whereas the eastern part of the corridor will better fit independent businesses, this area may be better suited to a chain drug store.
- **Medical Offices.** There is already a large presence of medical offices in the area, with the presence of Doctor’s Hospital nearby a contributing factor.

- **Other Offices.** Broad Street is a heavily traveled arterial on which it is possible to find office space that is more affordable than in the downtown or in suburban office parks. It can be an attractive location for small businesses that want to locate on the west side of Columbus.
- **Auto Service.** Lot size is again a factor in being able to provide space for a multi-bay garage and parking for customers.

This corridor is suited to other uses like auto parts stores and variety (dollar) stores, but the presence of all of the major chains nearby makes an additional store unlikely. The exception to that may be if one of these stores were to relocate to a new and larger freestanding building.

The Great Western Shopping Center is an area for special consideration. As it is currently configured, the center will attract discount retail catering to a low income demographic, along with back office functions and wholesale operations. This route ensures continued lackluster performance that will not provide a revenue stream for upgrades or redevelopment. The alternative is a large scale redevelopment project that will convert most of the site to a use other than retail commercial.

Sullivant Avenue

Sullivant Avenue can capture many of the same uses as both sections of Broad Street, with the exception of drug stores, hardware stores, and some medical offices. The greater concentration of ethnic (African, Hispanic, and Middle Eastern) businesses and consumers opens up other opportunities for the corridor. Even eating and drinking places, health care stores, personal care services, and office uses are more likely to cater to a specific demographic that may be pulled from a wider part of the city. Additional business opportunities in this area – independently owned business tied to ethnic markets – include:

- **Furniture and Home Furnishings Stores.** These will tend to be small stores carrying items reflective of, and marketed to a specific culture.
- **Grocery Stores.** These will also be small operations related to an ethnic population.
- **Specialty Food Stores.** As with grocery stores, there will most often be an ethnic tie. Examples might include a panaderia or a Halal butcher.
- **Clothing and Clothing Accessories Stores.** These stores will cater to the fashions of a particular culture. They may

also draw from well beyond the neighborhood, as does La Chaparrita on Broad Street.

- **Sporting Goods, Hobby, and Book Stores.** The Islamic Bookstore on Sullivant Avenue, at the Holly Hill intersection, is an example of these businesses.
- **Gift, Novelty, and Souvenir Stores.** These businesses import a large variety of items and can have a broad appeal, beyond simply the culture they represent.

Priority Redevelopment Sites

Several sites stand out as opportunities for redevelopment, whether new construction or rehabilitation of existing buildings. Some prior redevelopment in the corridors can serve as a model. Projects worth noting include the Columbus West Family Health and Wellness Center at 2300 West Broad Street (renovation and new construction), the Family Dollar at 2383 West Broad Street (new construction), Dollar General at 3561 Sullivant Avenue, and Donato's Pizza at 3389 Sullivant Avenue (new construction).

Broad Street East Redevelopment Area

While this area falls outside of the study area boundaries, its redevelopment will have a catalytic effect on Broad Street in the study area. Redevelopment might occur along all or a portion of the Broad Street frontage between Whitethorne Avenue and Glenwood Park.

Several features of the area make this a strong candidate for redevelopment.

- It is immediately across from the state office buildings, and easily accessible to employees. New development in this area may help to convince these employees to venture further west along Broad Street.
- It is the actual gateway to the Hilltop Neighborhood, and its redevelopment



Three potential redevelopment sites in the Broad Street East redevelopment area.

will present a more attractive first impression to anyone entering from the east.

- It is close to the I-70 interchange and has the potential to draw traffic off of the highway.
- The adjacent parks are also a source of some customer traffic.
- Nearby businesses (ex., CVS) might have an interest in expanding to a larger, freestanding building at this location.
- Potential uses for this site include a gas station with convenience store, hardware store, drug store, and fast food or other restaurants.



Two potential redevelopment sites at the Broad Street and Wheatland Avenue intersection.

Broad Street and Wheatland Avenue

One corner of this intersection has been redeveloped with the Columbus West Family Health and Wellness Center. Redevelopment is possible on all of the remaining corners, but the two priorities should be the northwest and southeast corners. Both sites are partially vacant with poor quality commercial buildings.

- New development here will continue the pattern of new investment further into the traditional Broad Street district.
- Redevelopment has the potential to establish a better entry into the traditional business district, resulting in a better first impression.
- Chain businesses will not be as interested in this location, which is further from I-70. It is an opportunity for strong independent businesses to get into a larger, modern building with private parking.

Broad Street and Hague Avenue

Hague Avenue is the most important cross street on Broad Street in the study area. Two areas, on or near the corner, are considered good candidates for redevelopment. Both include parcels that are already vacant. New uses at these sites could help to attract new tenants and spur renovations to other commercial buildings in the vicinity.

- The southeast corner has the potential to be redeveloped with a modern gas station (Sonoco occupies part of the site) with a convenience store. The adjacent parking lots, if not the church, could be assembled to create a site of sufficient size.
- Half of the block between Chase Avenue and Powell Avenue is vacant, and the remainder is occupied by small commercial buildings. This site could accommodate a small strip center or one or two free-standing buildings for uses such as fast



Two potential redevelopment sites at the Broad Street and Hague Avenue intersection. Walgreen's may also be approached to consider an expanded store at this, or another Hilltop location.



The Great Western Shopping Center should be considered for redevelopment with a mix of employment, residential, and commercial uses.

food restaurants, banks, or office buildings.

- The existing Walgreen's is considerably smaller than the chain's current prototype. The potential to expand or redevelop its location should be explored.

Great Western Shopping Center

This center was once among the strongest retail locations in the Columbus metropolitan region. That is no longer the case and retail will not be returning to the location. Its big box stores are not in demand and its vast parking lots are wasted space. Left as is, it will continue to attract tenants who will only pay the lowest rent, including a smattering of retailers and non-commercial uses like back offices and churches. Without additional revenue, maintenance may be deferred and the property will not receive the investment it already needs to modernize.

Ultimately, it is in the City's best interest to encourage a re-thinking of the uses and an extensive redevelopment of the property. A mix of uses seems most appropriate for the site, with small commercial along the Wilson Road frontage, and industrial or back office uses to the north and east. This may enable some of the existing structures to remain and be adapted to new uses.

2359 and 2365 West Broad Street

Family Dollar occupies half of the block where these two buildings are located. The Family Dollar store is new and serves as a good model for urban infill. As targets for façade renova-



2359 and 2365 West Broad Street share a block frontage with the new Family Dollar store. If rehabilitated, that block would serve to encourage other nearby property owners to invest in their buildings.

tion, at a minimum, these buildings will complement the adjacent, newer store, and present an attractive appearance along the entire block. Businesses located in the buildings will benefit from having a strong traffic generator next door, and the refurbished block will help to spur similar investment nearby.

2654-2660 West Broad Street

Architecturally, this Tudor Revival commercial building may be the most recognizable building in the study area. Essentially intact, the building is in need of work to spruce up the interior (cleaning, paint, new awnings, matching and architecturally-appropriate doors, as well as remove the satellite dish and air conditioner) and to make the interior units marketable. Ideally, it would be possible to acquire property behind the building for private parking and add a rear entrance. While many alternative uses might be contemplated, this building's unique character makes it especially attractive for a restaurant. As a landmark in the district, its rehabilitation will send a positive message for the direction in which the area is headed.

2850 Sullivant Avenue

This former gas station is now the home of Ish-tar Auto Sale. Hilltop Dairy Twist, an iconic business in the corridor, is located to the west. BP and United Dairy Farmers, both newer or remodeled gas stations, are to the east. Removing this structure would improve the appearance of a three to four block length of the road. One approach may be to combine it with the Hilltop Dairy Twist site, enabling a reconfiguration of parking, access, outdoor seating, and landscaping to further improve the appearance of the corner.

3008-3036 Sullivant Avenue

This is one of the larger buildings on the Sullivant Avenue corridor. Although it has received some recent façade improvements, additional work could be done to open the remaining storefronts to the street and to add landscaping along the very wide sidewalk. This would create a more inviting shopping area and help to attract additional customers.

Sullivant Avenue at Wedgewood Drive

The buildings on either side of Wedgewood Drive contain several Middle Eastern and Hispanic businesses. The size of these buildings and existing concentration suggest the opportunity to make this cluster the center of an internationally-themed district. That process can begin by making façade, landscaping, and signage improvements to brand these centers as a cohesive ethnic shopping and dining destination.

2850 Sullivant Avenue may be removed to improve the appearance of the corridor, and has the potential to be combined with the adjacent property for redevelopment.

3008-3036 Sullivant Avenue, if given additional façade improvements, can improve the appearance of the district and attract additional customers to its businesses.



The strip centers on the south side of Sullivant Avenue, on either side of Wedgewood Drive, contain several ethnic businesses. These centers can receive façade treatments, signage, and landscaping that helps to brand them with an international market theme.



2654-2660 West Broad Street may be the most recognizable commercial building in the study area, and if restored, could help to establish a more positive image of the corridor.

Strategy and Implementation Plan

This section of the report lays out a strategy for revitalization of the Broad Street and Sullivant Avenue corridors. This strategy recognizes that there are several issues that create barriers to business development in the corridors, including physical issues like the configuration of lots and availability of parking, building conditions, competition from chain-dominated suburban centers, and the limited resources of local small business owners. None of these, though, is more significant than the deterioration of residential neighborhoods surrounding the corridors.

While some nearby neighborhoods are among the most desirable in Columbus, there are large swaths of the area that are becoming hollowed out as households move out and decaying housing units are demolished. Based on sustained trends, the Hilltop's trade area loses more than 500 households per year, and the pace is accelerating as the greatest losses are among family households. The case is clear: businesses will not be attracted to an area that is rapidly losing population, and to revitalize these commercial corridors, it will be necessary to reverse the losses.

Although indirect, this is an essential goal. Other goals more directly impact the commercial corridors through business development and real estate initiatives.

Developmental Goals and Objectives

The following goals and objectives are intended to guide the City in assessing outcomes as it seeks to re-energize Broad Street and Sullivant Avenue as vibrant commercial corridors.

1. Create healthy and growing neighborhoods that will support a variety of desir-

able retail stores, eating and drinking establishments, services, and office uses along the Broad Street and Sullivant Avenue corridors.

- Re-establish the Hilltop Neighborhood as a desirable place for working- and middle class owner occupied housing.
 - End the trend for home abandonment, foreclosure, and tear-downs.
 - Encourage home ownership and investment in home renovation.
 - Promote infill development of new single family homes and multifamily buildings in appropriate locations.
 - Invest in assets such as schools, parks, trails, and other amenities that add value to the neighborhood.
2. Attract and aid in the growth of existing commercial businesses that includes a mix of chain and independent retail, dining, and services.
 - Support a varied mix of businesses that meet the needs of people living in nearby neighborhoods.
 - Attract and retain chain businesses, such as the pharmacies, variety stores, and similar businesses that anchor nodes on the commercial corridors.
 - Assist existing businesses that have the potential to grow and occupy new or rehabilitated space.
 - Develop programs to encourage business formation and growth through incubation, technical assistance, marketing, and financial incentives.
 3. Develop a cluster of ethnic retail and restaurant businesses that can be a destination district drawing from much of the metropolitan area.
 - Brand and market relevant areas of Sullivant Avenue as a destination for ethnic dining and shopping.
 - Develop customized programs to encourage ethnic business formation, growth, and marketing to a multicultural community.
 4. Encourage commercial property redevelopment or rehabilitation, as appropriate, to improve property values, enhance the visual quality of the corridors, and meet the needs of businesses for quality commercial space.

- Target activities to priority redevelopment and rehabilitation sites.
 - Actively reach out to business and property owners to initiate real estate projects.
 - Proactively acquire land and assemble redevelopment parcels.
 - Create a supportive framework of land use regulations, code enforcement, and incentives for redevelopment.
5. Mitigate the impact of activities such as crime and drug use, that discourage people from visiting the commercial corridors.
- Assess the corridors, properties along the corridors, and sites known for illicit activities for possible crime prevention through environmental design (CPTED) enhancements.
 - Provide small matching grants to business and property owners to install video surveillance cameras.

Business Recruitment and Expansion

This business recruitment and expansion strategy is designed for both chain and independent businesses. The primary targets are those business types identified for each corridor, or particular segment of the corridor.

Chain Business Recruitment

Connecting with chain businesses is a relatively easy task. Local management should be approached to deal directly with any issues impacting a single store. For issues of new store development or expansion, contact should be made with the regional real estate representative and operations manager.

The City will want to concentrate its efforts on a small number of chain businesses that have

the potential to take action (move, expand, or open a location) within the districts. These will include drug and variety store chains and fast food chains. Aside from the potential opportunities identified in this study, some of these may be reached through events like regional or national deal-making sessions hosted by the International Council of Shopping Centers.

Independent Business Recruitment

Independent businesses might include startups along with existing businesses that are seeking to relocate or open an additional location. Due to their number and small size, it is difficult to identify these businesses. The most effective techniques will include purchasing lists from organizations such as Dun & Bradstreet or Google, working through partner organizations such as the Small Business Development Center and business associations, and canvassing neighborhood commercial districts to compile a current inventory. Social networking sites like Facebook and Meetup may also be methods of identifying and reaching out to these businesses.

Independent businesses will often require a greater degree of technical assistance as well as incentives to look at expanding into the Hilltop Neighborhood. Key actions that can be taken by economic development staff include identifying sites, providing market and site information, presenting design concepts, facilitating the application and approval process, and offering financial incentives that can be recaptured by the business immediately, rather than over time.

Commercial Broker and Developer Outreach

Brokers and developers are an important link to potential business development opportunities. In addition to maintaining lists and regularly sending information about opportunities in the corridors, representatives of the neighborhood (whether the City or its partners) should be attending networking events to provide updates about activity in the area.

Business Expansion Programs

A handful of businesses are mentioned in this report as possible expansion targets. There are likely others already in each corridor. Other businesses may not be physically expanding, but would benefit from technical or other assistance to help them grow their sales. The most common needs are related to marketing (particularly how to develop a web/mobile presence),

technical issues related to business management, and cash flow.

The City should be working with partner organizations to develop training programs and one-on-one assistance programs around these issues. Because of the international presence on Sullivant Avenue, care should be taken to reach out to these communities to provide assistance in their native languages, when necessary.

New Business Development

Startup businesses are among the strongest prospects to fill space on Broad Street and Sullivant Avenue, at least in the near term. The City of Columbus and its partners can take measures to increase the number of potential startups as well as to help them develop the capability to succeed.

Retail Businesses

A variety of techniques are available to help develop new retail businesses. The City of Columbus may consider a tiered approach.

- **Identifying Retail Startups.** Aside from advertising and working through partners (like the SBA, SCORE, and business district associations), some communities have tried to create activities that draw in potential entrepreneurs. As an example, Downtown Marshfield (Wisconsin) help a baking competition through which it awarded the winner six months of free rent if were to start a downtown business. A cupcake bakery, *2½ Cups* won the event, opened a shop, and within a year signed a lease to expand into the vacant space next door.
- **Technical Assistance.** Many programs do not have physical space, but offer technical assistance to retail businesses. This can include areas of expertise unique to the retail industry.

- **Financial Assistance.** Financial assistance for retail businesses tends to be dominated by loans or small grants for signage or façade improvements. Fewer programs offer funding for furniture and fixtures, inventory, or operating expenses. This limitation on how funds can be used is an obstacle for many businesses.
- **Retail Business Incubation.** Retail business incubators have not been common, but there are a growing number of models being developed across the country (see inset). This approach will have the most impact for the Hilltop Neighborhood, simultaneously helping the business to become established and helping customers become familiar with the products, as well as becoming comfortable with the neighborhood.

The approach recommended for the Hilltop Neighborhood is to develop a program that will offer tiered services including a program of technical assistance (merchandising, marketing, customer service, retail business management), financial assistance (storefront renovation grants and loans, interior renovation grants and loans, rent subsidies), a mobile retail component that will travel to sites including major employers in the area, and eventually a physical incubator space.

Restaurant Businesses

Comprehensive programs to develop restaurant businesses are a recent phenomenon. They range from fairly basic packages of financial and technical assistance, to elaborate programs delivering training and technical assistance along with shared kitchens and services, and even space.

- **Identifying Restaurant Startups.** An approach similar to that used for retail will work. Many restaurant businesses emerge from farmers markets, food trucks, and catering businesses. These should be targeted for outreach.
- **Technical Assistance.** Needs common to the restaurant industry include assistance with menu planing and pricing, regulatory compliance and permitting, workforce recruitment and training, and general business management.
- **Financial Assistance.** Typically, the largest expense in fitting out restaurant space is in ventilation and fire suppression. A particular challenge is that these are often leasehold improvements, which can be more difficult to

finance. Other expenses include furniture, fixtures, and equipment along with

general building improvements.

- **Restaurant Incubation.** A handful of

communities have begun to develop res-

Models of Retail Business Incubation

Until recently there have been few examples of retail business incubators. The Great Recession was something of a turning point, though, as a number of government and economic development organizations, private developers and landlords, and even retail businesses realized that new approaches will be needed to fill vacant retail space. A handful of examples will help to illustrate the more common or innovative approaches being used.

Downtown Kalamazoo, Inc. has created a program for incubating retail businesses in a permanent location. The business receives 18 months of subsidized rent (50 percent of market rate) and training in merchandising, customer service, marketing, and business management. In addition, they are mentored by an established business. The business is required to be open at least 50 hours per week and share sales and financial information to allow its progress to be tracked. The program is credited with reducing the district's vacancy rate from 20 percent to less than five percent.

In **Rochester, New York**, the City has long run a food truck program that has helped (along with its public market) to develop new dining businesses. More recently, that program was expanded to include retail businesses. The Fashion Truck and The Fashion Taxi are two examples of clothing businesses that "occupy the space between bricks and mortar and the internet". These and other retail trucks are governed under the same rules as food trucks, and have a regular circuit of locations as well as being available to be booked for parties.

Popup retail is a similar concept, offering temporary space in which potential businesses can inexpensively test a business concept. **Downtown Indianapolis** partnered with a fashion magazine, PATTERN, to launch its own popup program in May of 2018. St'Art 317 aims to attract artisans, entrepreneurs, and creative retail outlets to grow business through the use vacant spaces located in many of the city's vibrant neighborhoods with the long-term goal of eliminating empty storefronts. Businesses are placed in storefronts, window displays, and other locations for one month. Space is provided by landlords attempting to fill vacancies.

Norfolk, Virginia provides a model that more closely follows the typical incubation approach. The Seldon Market has spaces from 200 to 400 square feet which are made available to first-time retail business owners. A small number of additional spaces are provided to established businesses that act as mentors. There are also kiosks for popup retailers, and the library runs a makerspace with 3-D printers, a recording studio, a laser cutter and other high-tech equipment. Rents increase over two to three years to encourage the business to grow and move into conventional retail space. Tenants receive two hours of technical assistance per week. The Market is currently incubating nine retail businesses.

In **Tulsa**, a local developer has taken a more unusual approach, developing a two-story assemblage of shipping containers that house startup retail and other businesses. The Boxyard (at right) provides small, inexpensive space for businesses to grow, and the unique setting helps to draw visitors.



restaurant business incubators. These em-

brace a variety of approaches, and some are dedicated to starting restaurants in specific parts of the community, while other programs are city-wide in scope.

As with retail, a tiered approach is recommended. The City can begin with simple and quickly-implemented programs, working toward a more complex program that includes incubation.

Recommended Tools

The City of Columbus has established several programs and tools to assist in revitalization within the Hilltop Neighborhood. Still others might be considered, often tailored to specific business types.

Existing Revitalization Tools

The City of Columbus has already put in place a number of tools to assist in revitalizing the district.

- **Commercial Zoning Overlay.** The overlay district includes all of the Broad Street Sullivant Street study areas. The overlay creates more detailed design standards for commercial buildings in the area.
- **Enterprise Zone.** The Enterprise Zone is a designated area in which businesses, and new residential development, may be eligible for exemptions on new property tax from investment in new building construction and/or improvements to existing land and buildings. Most business types, including retail, are eligible.
- **Neighborhood Commercial Revitalization District.** Businesses in designated areas in Columbus, including a portion of Broad Street, are eligible for assistance including loans up to \$100,000 for fixed asset financing, grants to encourage storefront renovation, and assistance with

Models of Restaurant Business Incubation

As with retail, restaurant have not been a usual target for startup assistance. This has changed in part with the growing interest in food and other forms of food-related economic development, such as farmers markets, food hubs, food manufacturing incubators, shared use commercial kitchens, food halls, and food trucks. Several models have emerged that embrace an eating or drinking component.

Faced with the challenge of funding Redwood Acres, a county fairgrounds in **Eureka, California**, the nonprofit managing the facility has come up with a unique approach. It has converted buildings on the fairgrounds to food manufacturing space. Many of these businesses incorporate tasting rooms or space for vending their products. The site serves to incubate some businesses until they outgrow the space, while others will be more permanent.

The Lobeck Taylor Family Foundation in **Tulsa, Oklahoma**, set out to target restaurant business formation with its Kitchen 66 incubator. IN addition to a shared use kitchen, the foundation has developed a four-month program in which industry experts provide step-by-step assistance in launching the business. Kitchen 66 and the Launch Program provides assistance in attaining proper licensing, securing kitchen space, marketing, and access to sales opportunities such as catering and mobile popups. In several cases, the foundation has acquired and renovated space in which to locate its program graduates. In 2018 the foundation will open the Mother Road Market, a new home for its kitchen facilities and a food hall with space for 17 restaurant businesses.

Milwaukee's Near West Side Partners have targeted restaurants as an opportunity to activate vacant commercial space. An annual contest is used to select one or two businesses that will receive assistance from the organization. As the business is receiving assistance and planning to open its space, it has the opportunity to set up shop at the area's large employers (Harley-Davidson, Miller/Coors, Marquette University) where employees – future customers – can be exposed to its products. The Partners provide technical and financial assistance as

interior storefront renovation.

- **Neighborhood Investment District.** Owners of residential property in the district who make substantial upgrade or build new can receive an abatement of their taxes on the improvements for up to 15 years.
- **Tax Increment Financing.** This tool allows the City to recapture the increased property tax revenue due to development to reinvest within the district.
- **Special Improvement District.** Commercial property owners and businesses can elect to raise an additional property tax assessment to collect funds used for the improvement of the district.
- **Business Loan Fund and Working Capital Loan Fund.** The City's Business Loan Fund provides a matching loan to \$199,000 for the acquisition of real estate or equipment. The Working Capital Loan Fund provides up to \$100,000.
- **Proactive Code Enforcement.** This program marshals the City's code enforcement team to aggressively pursue owners with chronic code enforcement issues, in distressed parts of the city.

Potential Revitalization Tools

Several programs might be considered to offer more tailored assistance to businesses and property owners or developers.

- **One-Stop Information Portal.** An online portal should be developed and maintained with the most current information related to the market and opportunities in the corridors. Examples include traffic counts, passenger counts for transit stops, new business starts, commercial investment, available properties, targeted opportunities, market demographics, etc.
- **Restaurant Ventilation/Mechanical Improvement Program.** A financial pro-

gram targeting this specific need could be developed with local manufacturers. Conceptually, local suppliers will offer a discount on the purchase and installation price, and the City will provide an interest-free loan (perhaps through area banks to help meet their CRA requirements).

- **Commercial Building Renovation Design Grant.** Building owners often need help in understanding how their property could look, and it is the interest of the both them and the City that investments in the façade actually improve the building's appearance, functionality, and value. Several communities seek to encourage appropriate renovation by providing design grants, which can be in the form of paid architectural services. Some require a match while others do not. Such a program will benefit the Broad Street and Sullivant Avenue corridors.
- **Retail/Restaurant Technical Team.** The small businesses in these corridors are not unlike their counterparts all over the country. Many could benefit from technical assistance to make their businesses more successful. The City and its partners should assemble a pool of technical experts who are able to provide free team audits as well as one-on-one consultation.
- **Residential Infill Program.** The Hilltop should be a place where people can find or build good quality, affordable single family homes. There is a great opportunity for individuals to build infill housing. City programs can encourage this. Examples include:
 - Urban homesteading to provide free lots to people who will build and live in the home for a minimum number of years.
 - A library of free home plans that can be quickly permitted and built for a known cost by local contractors.
 - A waiver of fees such as building permits, inspections, and water and sewer connection fees.

These can be used in conjunction with already existing incentives like property tax abatements.

Recommended Policies and Programs

The City of Columbus already has addressed many of the issues related to potential development within the Hilltop Neighbor-

hood. Interviews turned up few issues related to the regulatory environment.

Zoning Changes from Residential to Commercial

Small lot sizes are a challenge for redevelopment in the older parts of both corridors. Land assembly may be possible, but will often include residential parcels. The City has generally treated requests to rezone residential lots to commercial favorably. It still may be helpful to develop a policy framework to give guidance to businesses or developers, addressing issues such as where rezoning may cause conflicts or approaches to mitigate potential concerns.

Land for Parking

The City's land bank occasionally acquires parcels on blocks containing commercial frontage. The funding mechanism used to purchase the property can carry limitations as to what uses for which the property may be later sold. This issue has come up where businesses have been unable to purchase an adjacent vacant lot for parking.

The land bank should review its policies for parcels that might have a commercial purpose, which might be any property on a block with commercial frontage. In these cases, the funding used to make the purchase should provide the latitude needed to convert those parcels to commercial use.

As an added consideration, the land bank should identify blocks where, in the long term,

multiple parcels could be assembled either by the land bank or a private developer, to rezone and develop for commercial uses. In these cases, the land bank should be holding the parcels, rather than making them available for sale for non-commercial use.

Detailed Action Steps

The implementation of a strategy can be phased, with subsequent steps building on the foundation laid by prior ones. Timing will be dependent upon the availability of staff, funds, and other resources necessary to carry out initiatives.

1. **Policy and regulation.** Several potential policy changes or issues related to regulation have been mentioned in the report. As a first step, the City can adjust them to better accommodate the change desired in the area. This activity could take place in 2019.
 - Update land bank policies and sources of funds to permit acquired property on blocks with commercial uses to be converted to parking or used for commercial development.
 - Identify land bank sites that should be held for future development, potentially assembling larger redevelopment parcels.
 - Revise zoning to permit the creation of larger commercial or mixed use development sites, by allowing commercial uses on lots on blocks with Broad Street frontage.
 - Existing incentives should be reviewed to determine the potential to change policies to address needs that are not presently eligible for inclusion. As an example, there are many requests from building owners for financial assistance to help with structural and mechanical system repairs, but funding may be limited to



- façade enhancements. Altering the rules of these programs may be easier than creating new programs.
2. **Brand and outreach.** Perception is a weight that drags down places like the Hilltop Neighborhood. Establishing an effective brand and communicating brand will help to put it in a more positive light, as it did in the case of Franklinton. Developing an effective brand strategy is something that could take place in 2019, with implementation beginning in 2019 or 2020.
 3. **Tools and incentives.** It will take longer, in many cases, to launch new financial incentive and technical assistance programs aimed at small businesses. These include in-house and contracted experts to offer direct technical assistance to businesses, and grant, loan, and lease programs for building repairs, façade and interior renovations, and furniture, fixtures, and equipment. The design of these programs can begin in 2019 with a launch in 2020.
 4. **Neighborhood improvement.** No other effort made by the City will have more impact than stabilizing the neighborhoods around Broad Street and Sullivant Avenue. The combination of population losses (a shrinking market) and concerns about safety are causing businesses to look elsewhere to open new stores or restaurants. These conditions need to change. The City will need to give thought to a comprehensive program of neighborhood transformation, which can include some examples suggested in this report. The planning process can be expected to take a year or more, with an equal amount of time to begin implementation. Some programs can start earlier, and the City can target 2021 to have a full program in place.
 5. **Priority redevelopment.** Several sites have been identified as having potential for redevelopment, or are situated to have significant impact on adjacent sites if they were to be redeveloped. In most cases, the redevelopment process could be initiated at any time. The first step will be to reach out to owners to gauge their interest and to determine what assistance might be necessary from the City, such as property assembly, design and zoning, or financial assistance. While outreach can occur immediately, it may take years to complete a redevelopment project, depending on its complexity.
 6. **International district.** Developing an internationally-themed district on Sullivant Avenue will encourage small business development and generate new customers for those businesses. There is already a substantial base of businesses to anchor the district. Implementation measures will include:
 - Conducting a marketing campaign to raise awareness of the area.
 - Working with small businesses to improve operations and their ability to meet the expectations of a wider market.
 - Working with property owners to implement design enhancements consistent with the international theme.
 - Installing a public streetscape to further develop the international theme.

While the City can begin with outreach to the business and property owners in the area, implementation of this strategy is expected to take longer, and follow some of the prior actions such as developing economic development tools and incentives.
 7. **New business development.** This step envisions the establishment of comprehensive programs to assist startup and existing retail and food service businesses, such as those outlined in Appendices A and B.

Appendices

- A. Potential Restaurant Startup Program
- B. Potential Retail Development Program
- C. Branded Marketing Brochure
- D. Infographics
 - Challenges in the Corridors
 - Businesses on Broad Street
 - Businesses on Sullivant Avenue
- E. Cut sheets for Retailers, Entrepreneurs, Developers, and Investors
- F. Stakeholder Insight and Priorities

Appendix A: Potential Restaurant Startup Program

The following is the framework for a potential restaurant business development program that may be established by the City of Columbus. While intended to foster entrepreneurship in the Hilltop Neighborhood’s commercial corridors, it could have applicability in other parts of the city.

The recommended approach established four tiers, with businesses establishing eligibility for the services and financial assistance available at each tier. That eligibility can be established by

successful completion of the course will establish eligibility to participate in Tier 2 programs including a restaurant business incubator. Appropriate assistance at this level may include grants to reimburse costs for all or part of the training and technical assistance provided.

Tier 2. Participants at this tier receive more advanced training and technical assistance, and have the option of opening their business through a restaurant incubator. Training will be delivered in small groups with a hands-on format, focused on advanced topics and shared issues facing current Tier 2 businesses. Technical assistance will be provided to help the businesses

	TIER 1	TIER 2	TIER 3	TIER 4
STAGE	Pre-startup / planning	Startup / incubation	Transition to independence	Transition to independence
TRAINING	Comprehensive program of restaurant business classroom instruction	Small group training on management and other topics	Small group training on choosing a location and opening the restaurant	Small group training on choosing a location and opening the restaurant
TECHNICAL ASSISTANCE	Assistance with business startup and regulatory compliance issues	One-on-one assistance with management and technical issues	One-on-one assistance with design, permitting, and planning an opening	Restaurant audit team, targeted technical assistance
INCUBATION SERVICES	Establish eligibility	Four possible programs: 1. Virtual (leased kitchen) 2. Mobile 3. Restaurant incubator 4. Leased or owned site	Transitioning to permanent restaurant space	Post-graduate
ECONOMIC DEVELOPMENT TOOLS	Grants or cost-sharing of training program	Kitchen network, low-cost (subsidized) physical or mobile space	Façade and building grants and loans, restaurant equipment grant or loan / lease program	Façade and building grants and loans, restaurant equipment grant or loan / lease program

successfully complete the prior tier.

Tier 1. The services at this level are targeted to people who have not yet started their business. The core service provided will be classroom instruction to impart basic knowledge of what is required to start, own, and operate a restaurant business. This will be accompanied by technical assistance to help potential owners form the business and to identify and comply with the regulations applicable to their business. Suc-

cessfully complete the prior tier.

Incubation is a critical service provided at this tier. Four approaches should be considered to fit the circumstances of client businesses, based on affordability and the type of food service they intend to provide.

1. **Virtual.** There are several commercial kitchens in the Hilltop Neighborhood (and elsewhere) that are not being fully utilized. Examples include kitchens in churches, community centers, social or fraternal organization halls, and business cafeterias. The City can establish a

program and portal to connect owners of these kitchens with food businesses, including restaurant startups, that will lease time to prepare their products. In addition to training, technical assistance, and connections to kitchen space, the role of the incubator for these clients should include presenting opportunities to serve clients. The incubator can rotate clients through several venues such as at public buildings and parks, community events, and at large businesses on weekdays. The incubator should be providing marketing to bring clients to its businesses at these sites.

2. **Mobile.** Some businesses will want to start a food truck. Others may see it as a stepping stone to a permanent location, for financial or other reasons. The restaurant incubator can support this approach through either the owner's food truck, or by potentially having its own food truck fleet. As with kitchen users, the incubator should also be providing rotating locations where these businesses can set up, sometimes coinciding with kitchen business locations.
3. **Restaurant incubator.** A restaurant incubator can be established in one of two ways. More recently, the approach has been to develop food halls where often, a dozen or more businesses will be provided space to set up a restaurant. That space usually consists of 200 to 400 square feet with a kitchen and counter, and there is a shared dining area. The alternative (which may be more suited to the Hilltop Neighborhood) is a commercial building where one or more spaces are provided, depending on its size. These businesses may share a kitchen and/or with dining

space, depending on how it is configured. The intent is to graduate businesses to their own space in one to three years, and lease terms are staggered to provide continuity to patrons as well as to reduce vacancy.

4. **Leased or owned space.** Some businesses will have the desire and resources to establish themselves in their own space. These should still be considered candidates for incubation in situ, receiving training and technical assistance, and access to incentives.

Economic development assistance at this stage will typically include subsidizing the cost of training and technical support, and of space. Other initiatives will include establishing a program to connect users to available kitchens, and developing the incubator.

Tier 3. A common failing among many business incubators is that they do not have a formal approach to helping graduate tenants and move them into conventional space. This is the focus of Tier 3 in the framework presented here. While generally targeted to impending graduates of the incubator, these services may be offered to other restaurant businesses that are viable, but did not go through the incubator. Training and technical assistance will focus on issues of site selection, lease negotiation, ensuring regulatory compliance, restaurant design, and planning and marketing for the opening. Financial assistance can be provided in the forms of grants, loans, and equipment leases, some of which may specifically address signage, façade improvements, ventilation and fire suppression improvements, leased kitchen equipment, and structural or code compliance costs.

Tier 4. The restaurants at this tier are established, whether graduates of the incubator or other programs, or not. Their need for assistance may spring from a desire to grow, to simply improve a successful business, or to overcome difficulties they are experiencing. Two core services are recommended. The first of these is an "audit team" of persons with experience in the restaurant industry, along with regulations. This team will be made available to review all aspects of a restaurant's operations and offer a summary report detailing their findings, along with specific changes that can result in improved performance, or help the business to meet its growth objectives. The second service would be an extension of the programs offered through earlier tiers, referring the business owner to training programs or providing tailored technical assistance to address its issues.

The same incentives offered to Tier 3 businesses could have an impact among this group.

Appendix B: Potential Retail Development Program

A comprehensive approach to retail business development will promote startups, enable existing businesses to compete more effectively, and help them to expand.

Retail Expansion Program

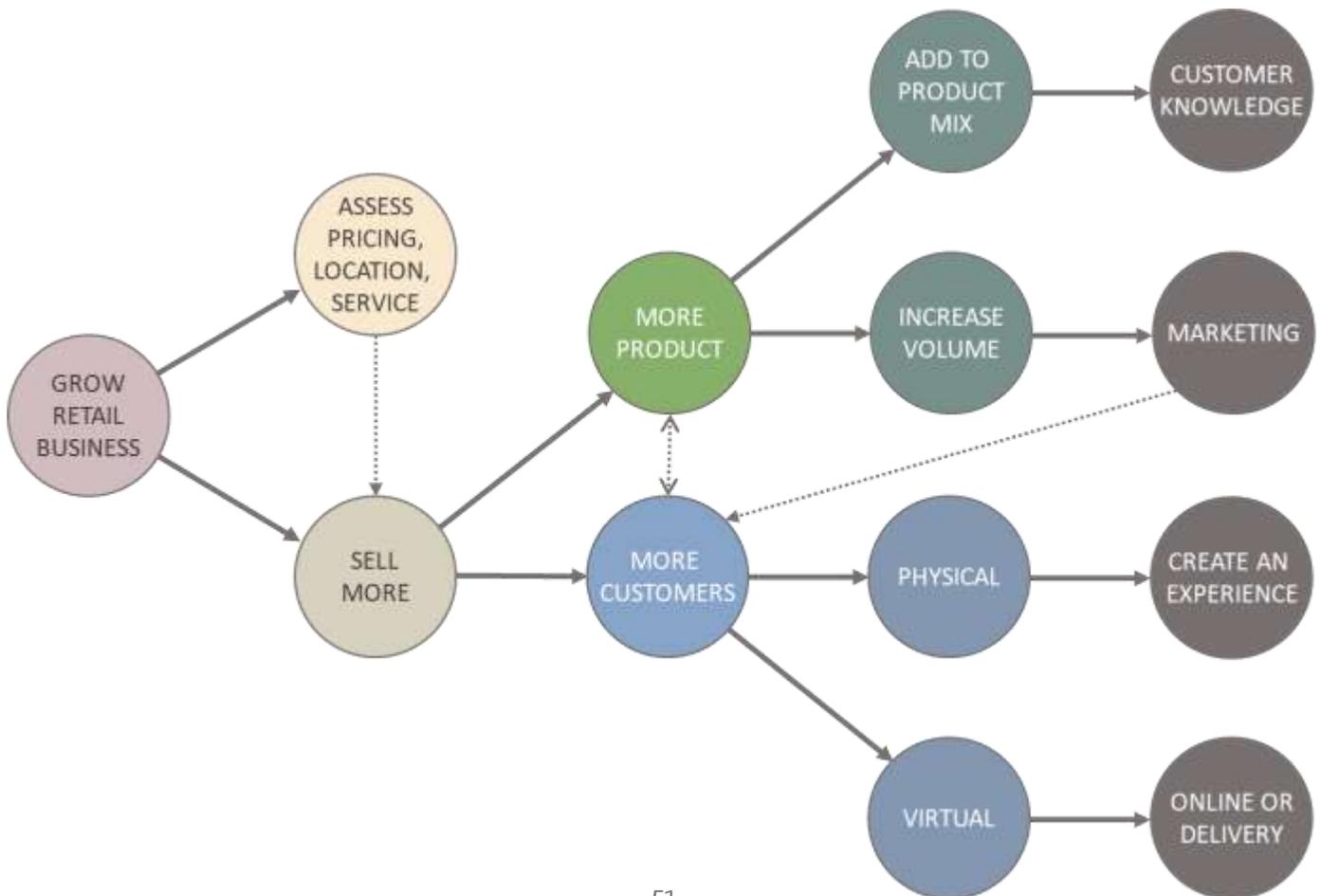
Conceptually, the recommended business expansion program follows a decision tree as depicted below.

A business that seeks to increase sales should start by assessing fundamental aspects of its operation such as its pricing relative to competitors, aspects of its location (market, competition, site and site layout, building, appearance, signage, merchandising, etc.), and the service it provides (customer service in general, added

services, hours of operation, etc.). These all have a significant influence on the ability to make sales. Aside from the potential to increase prices, selling more is the most basic way for a retail business to grow.

One way to increase sales is to sell more product, whether that may be a higher volume of the goods and services already provided, or by adding new goods and services. Increasing volume is most often approached as an issue of marketing, while adjusting merchandise and services requires an understanding of the actual and potential customer base. While the solution is sometimes to add similar and complementary items, at other times it may be to add a new and unrelated business line.

Adding customers is the second way to sell more. Marketing is again a piece of the puzzle, but the key issue is increasingly whether to pursue customers through a physical store or virtu-



ally, usually meaning online or a combination of online and delivery services. An online store is typically a better option for specialty retailers, and especially those with a unique product. Delivery and related services like product assembly provide a form of convenience for the shopper. They can be provided by the business or through services like Uber, Lyft, Grub Hub, and Instacart. Increasingly, retailers are trying to develop more of an experience around their store to enhance customer affinity for it. Examples include food stores that offer cooking classes or demonstrations, wine shops that offer tastings, and outdoor retailers that organize hiking or camping events.

Programs that the City of Columbus can develop to have an impact on business expansion fall into the three areas of assessment, technical services, and financial incentives.

- **Assessment.** The City should assemble teams of persons with retail experience in store operations, marketing, and merchandising, who can be tasked with reviewing and offering an unbiased assessment of the businesses and actions it can take to grow or be more competitive.
- **Technical services.** Technical services might be provided based on issues identified in an assessment, or when requested by a business without an assessment. The first approach offers some assurance of a more comprehensive, and more likely an effective utilization of City resources. Technical services should be provided by qualified personnel or contracted vendors, and might include general business topics (management, accounting, human resources, etc.) along with issues specific to retail such as market research, marketing and web-based marketing,

online stores, store design, merchandising, etc.

- **Financial incentives.** Programs that might be considered, in addition to those already in place, include grants to defray the cost of obtaining qualified technical expertise, signage grants, marketing grants, and loans for leasehold improvements and fixtures.

Retail Business Startups

Programs for retail startups can build upon those developed for existing businesses. Two of the areas in which they can be concentrated are in training and in issues related to space.

The training classes offered should be tailored to the retail industry, rather than simply generic programs on starting a business. Along with general business formation and management issues, classes should explore topics like market research, customer service, marketing, building an online presence, inventory management, merchandising, loss prevention, retail technology, etc.

Assistance related to space or occupancy issues can take several forms. The City may want to develop online resources and step-by-step guides, or toolkits, in addition to one-on-one assistance with some issues. Issues related to space and occupancy include:

- **Site selection.** Some startup retail businesses may give too little thought to a location when opening. Actions the City can take include putting together a checklist of issues to consider when selecting a retail site, compiling market information about the district or offering access to a site when demographics can be searched, and maintaining a database of available commercial property for lease or sale.
- **Purchase or lease negotiation.** This is another subject on which most startups have very little experience or knowledge. The City can develop a resource to help people understand the due diligence they should perform prior to signing a lease or purchasing a commercial property, and tips related to what to look for, or avoid in a lease.
- **Design (façade and interior).** A store's physical appearance, both exterior and interior, can have a great impact on the likelihood that potential customers will enter or make purchases. Again, this is a skill many potential business owners lack. Pairing them with experts in

design and merchandising will have a meaningful impact.

- Code compliance. This last issue is one that, once again, small business owners may not understand. It will be important to have a program to alert owners to potential issues prior to there being a violation, prior to design, and if possible, prior to committing to a lease or purchase.

Communities are becoming more active in the actual provision of space for retail businesses to be created. This is generally temporary space rather than a retail incubator building, or other more permanent space. Examples include:

- Pop-up stores located in vacant commercial buildings or in kiosks within buildings having a high volume of potential customers.
- Mobile shops similar to food trucks, that can be scheduled to locate in different areas every day of the week. These retail trucks might be considered alongside options often considered to bring fresh food into “food deserts”, like mobile groceries.
- Markets are also seen as a place where retail businesses can become established. There are examples of communities that are using shipping containers to build marketplaces on sites such as those awaiting redevelopment, that can easily be moved in the future.

Appendix C: Branded Marketing Brochure



WEST BROAD STREET

HILLTOP NEIGHBORHOOD
COLUMBUS • OHIO

SULLIVANT AVENUE

SMALL BUSINESS OPPORTUNITIES

The Hilltop Neighborhood is poised for renewal, reclaiming its place as a middle income neighborhood of home owners and attracting new investment to its commercial corridors. West Broad Street is heavily traveled as one of the principal commuter routes into downtown Columbus, while Sullivant Avenue is attracting eclectic businesses from the Asian, Hispanic, and Middle Eastern cultures calling the area home. The City of Columbus and the Hilltop Business Association have joined forces to promote these corridors, foster development, and support small businesses with financial and technical assistance.

The "Greater Hilltop Area" (as defined by the City of Columbus) is bounded by I-70 on the north, I-270 on the south and west, and the railroad track just west of Harrisburg Pike/Central Avenue/3C.

HILLTOP BUSINESS ASSOCIATION

The push to revitalize Broad Street and Sullivant Avenue is coming from within the community itself. Formed in 1926, the HBA offers business and property owners a way to network and collaborate to improve the area. It has been instrumental in hosting events, promoting the corridors, and fostering collaboration among organizations advancing economic development.

CITY OF COLUMBUS

The City's Division of Economic Development is an active partner in helping to improve conditions in the Hilltop Neighborhood. The City has established several programs and provided resources to the Hilltop Business Association and other organizations to carry out initiatives. It is a partner in locating resources to help businesses seeking to locate or expand in the neighborhood.

THE HILLTOP



To the east, **BROAD STREET** is the traditional shopping district so many places try to create; a walkable area with attractive, historic buildings. Further west it opens to create more opportunities for modern, auto-oriented commercial development. Broad Street is positioned to serve the Hilltop Neighborhood and the many commuters and nearby workers accessing the corridor's businesses. Along with other uses, the corridor has a large number of health care practitioners and pharmacies. There are several notable redevelopment opportunities along the corridor.



Areas from which Broad Street and Sullivant Avenue are drawing traffic.

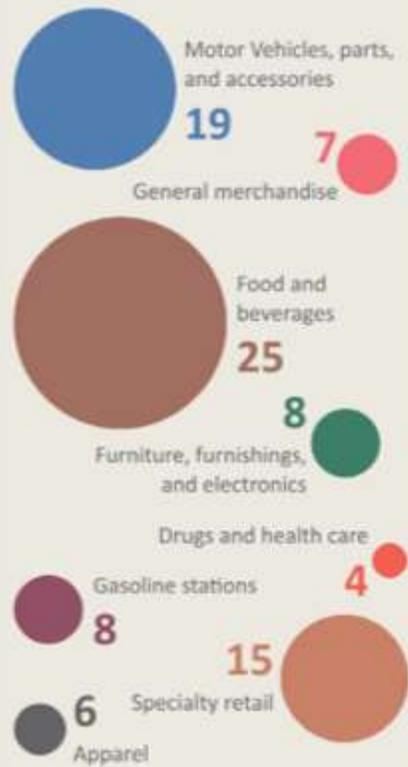


While its businesses serve people living in the area, **SULLIVANT AVENUE** is more than a neighborhood commercial corridor. A growing number of Asian, Hispanic, Middle Eastern, and other ethnic shops and restaurants have located on the street, making it one of the largest ethnic business districts in the Columbus region. These businesses offer an eclectic shopping - and especially dining - experience for visitors to the Hilltop. The City's initiatives seek to further develop this unique business cluster and draw a greater number of visitors to Sullivant Avenue.

HILLTOP NEIGHBORHOOD

COLUMBUS • OHIO

EXISTING RETAIL



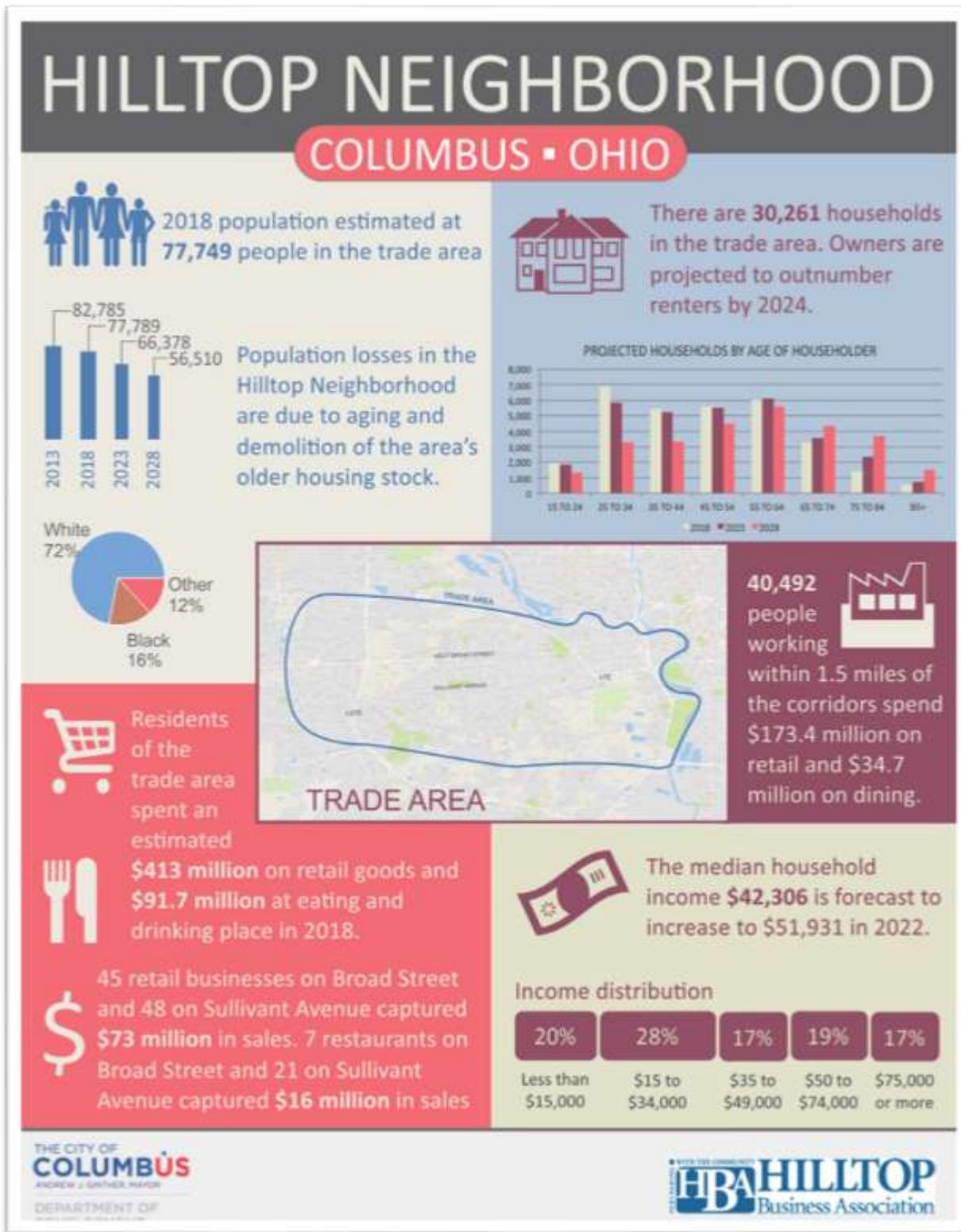
EATING AND DRINKING

TYPE OF RESTAURANT	POTENTIAL (millions)
Full service restaurants	\$38.5
Limited service restaurants	\$44.0
Other venues	\$9.2
Total spending	\$91.7

GAP ANALYSIS

TYPE OF RETAIL STORE	MARKET POTENTIAL	GAP (\$SURPLUS)
New car dealers	\$72,840,000	\$72,840,000
Used car dealers	\$6,904,000	(\$3,910,000)
Motorcycle, boat, other vehicle dealers	\$4,957,000	\$4,607,000
Automotive parts and accessories stores	\$4,597,000	(\$370,000)
Tire dealers	\$3,059,000	\$1,659,000
Furniture stores	\$6,019,000	\$6,019,000
Floor covering stores	\$3,232,000	\$2,148,000
Other home furnishings stores	\$9,062,000	\$3,232,000
Appliance, TV, and other electronics stores	\$2,146,000	\$8,037,000
Home centers	\$14,580,000	\$14,580,000
Paint and wallpaper stores	\$1,062,000	\$1,062,000
Hardware stores	\$2,221,000	\$2,221,000
Other building material dealers	\$13,088,000	\$13,088,000
Outdoor power equipment stores	\$626,000	\$626,000
Nursery, garden center, farm supply stores	\$3,556,000	\$3,556,000
Supermarkets and other grocery stores	\$50,408,000	\$41,921,000
Meat markets	\$582,000	\$582,000
Fish and seafood markets	\$192,000	\$192,000
Fruit and vegetable markets	\$358,000	\$358,000
Other specialty food stores	\$582,000	\$332,000
Beer, wine, and liquor stores	\$3,781,000	\$949,000
Pharmacies and drug stores	\$22,244,000	\$15,333,000
Cosmetics, beauty supplies, perfume stores	\$1,099,000	\$1,079,000
Other health and personal care stores	\$1,562,000	\$1,562,000
Gasoline stations with convenience stores	\$47,406,000	\$20,524,000
Men's clothing stores	\$877,000	\$877,000
Women's clothing stores	\$4,043,000	\$3,593,000
Children's and infant's clothing stores	\$1,120,000	\$1,120,000
Family clothing stores	\$9,709,000	\$9,059,000
Clothing accessories stores	\$590,000	\$590,000
Shoe stores	\$2,717,000	\$2,717,000
Jewelry stores	\$3,026,000	\$3,026,000
Sporting goods stores	\$3,649,000	\$3,424,000
Hobby, toy, and game stores	\$1,807,000	\$1,807,000
Sewing, needlework, and piece goods stores	\$534,000	\$534,000
Musical instruments and supplies stores	\$585,000	\$585,000
Book stores and news dealers	\$1,937,000	\$1,862,000
Department stores	\$8,263,000	\$388,000
Discount department stores	\$14,723,000	\$14,723,000
Warehouse clubs and supercenters	\$34,002,000	\$34,002,000
All other general merchandise stores	\$4,690,000	\$1,315,000
Florists	\$670,000	\$670,000
Office supplies and stationery stores	\$2,401,000	\$2,401,000
Gift, novelty, and souvenir stores	\$1,930,000	\$1,930,000
Used merchandise stores	\$1,077,000	(\$2,306,000)
Pet and pet supplies stores	\$1,208,000	\$1,158,000
Art dealers	\$1,680,000	\$1,670,000

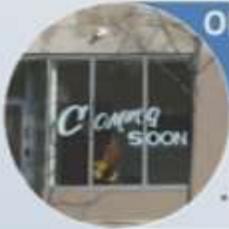
Appendix D: Infographics



SMALL BUSINESS OPPORTUNITY STUDY

BROAD STREET • SULLIVANT AVENUE

HILLTOP



OPPORTUNITIES

- The corridors are easily accessed and Broad Street is a major gateway into downtown Columbus.
- Despite losses, there are still 77,749 people living in the trade area.
- There are 40,492 people commuting in to work within 1.5 miles.
- Redevelopment is moving west from the downtown toward the Hilltop.
- Home ownership is increasing in neighborhoods around the Hilltop.
- There is a base of strong independent businesses from which to grow.



CHALLENGES

- The market is shrinking as people move out.
- Drug use and other crime is fueling negative perceptions.
- The loss of anchor retailers has impacted traffic to smaller businesses.
- Property values and rents do not justify the cost of needed improvements to buildings.
- The pattern of small lots and limited parking present challenges for modern retail and dining businesses.



STRATEGIES

- The first priority is to stabilize the neighborhood.
- Programs are needed to help form and grow the small and local businesses that will be making investments in the Hilltop's commercial areas.
- There is a need to brand the districts and create a favorable image.
- Safety needs to be addressed through programs to combat drug use and criminal activity.
- Selected sites in both corridors need to be targeted for redevelopment.



BROAD STREET

- Broad Street is a major route into downtown Columbus.
- These districts can be attractive, walkable commercial centers.
- There has been recent investments such as Family Dollar and state offices.
- Redevelopment sites offer the potential to attract national retailers.
- There is a significant presence of medical offices that can be a niche for the corridor.



SULLIVANT AVE

- This district to compete for chain businesses on large lots.
- Paving, streetscaping, and pedestrian improvements are needed.
- Fast food restaurants supporting the large daytime population in the area.
- A significant number of Asian, Middle Eastern, and African businesses can be the basis for an internationally-themed business district drawing from across the region.



Appendix E: Corridor Cut Sheets



SULLIVANT AVENUE

Columbus, Ohio

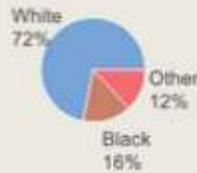


PEOPLE

77,789 People living in the trade area

30,261 Households in the trade area

40,492 Workers within 1.5 miles of Sullivant Avenue

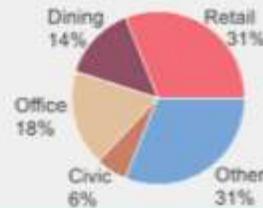


Proximity to Hollywood Casino • 14,200 to 19,100 cars per day on commuter route • Large daytime population • Branded as an international marketplace attracting Asian, Middle Eastern, and Hispanic businesses • Large presence of fast food restaurants • Recent investment - Dollar General, Wendy's, United Dairy Farmers • Development patterns allow stand-alone stores and strips with drive-through lanes and ample parking. • City incentives and programs for new investment



← PATH TO PURCHASE

BUSINESSES →



Advance Auto Parts
Dollar General
Donato's Pizza
Family Dollar
KFC
Key Bank
La Michoacana
NAPA Auto Parts
Papa John's
Pizza Hut
Wendy's

\$42,306 Median household income

\$587 MILLION Retail market potential

\$91.7 MILLION Dining market potential

THE CITY OF
COLUMBUS
ANDREW J. BENTLEY, MAYOR
DEPARTMENT OF
DEVELOPMENT
HILLTOP
Business Association

Appendix F: Stakeholder Insight and Priorities

Planning Next coordinated outreach to stakeholders during the analysis, interviewing multiple groups including City of Columbus and non-profit organization staff, business and property owners, commercial brokers and developers, and others. This appendix summarizes the insight that was shared.

Commercial Broker Interview

Describe the Columbus retail landscape overall. What are your thoughts on how the Hilltop area fits in that context?

Over 13 years, the retail landscape has changed—a night and day difference. In 2005, it would take 2.5 years to sell a property. New developments are moving into the Hilltop (ex: Family Dollar, Dollar General and a new fire department), but some investors are still afraid because of crime and other social issues. The area could be an up and coming neighborhood. Westgate and Franklinton have been influencing prices in the Central Hilltop area. Most are homeowners in Westgate. Prices on Midland have gone up. The Hilltop area is where you will see the next big boom.

What are the greatest challenges for the Broad/Sullivant corridors?

The area is home to some small businesses (Broad Street), but the area has been generally abandoned by business for a long time. The buyer demographic is a challenge. Most are foreign investors and paying cash. Because they use cash they pay less, and this devalues property in the area.

What are your perceptions of the Broad street and Sullivant Avenue corridors (strengths, weaknesses, opportunities) in terms of a location for retail activity?

The commercial market is driven by the residential market. Millennials want to change the area for the better and like it because there are some good older homes with character and the area has good access to downtown. Younger people are willing to take risks here, so the property prices are growing. As residential values go up, larger retailers will want to move in.

There are some all brick properties on Sullivant (a positive). There are a lot of character homes built in the 1900s. Some investors are demolishing and remodeling properties. Out-of-towners will buy up 50-70 properties at a time. There is potential for converting buildings into grocery stores. Smaller convenience stores are opening. Jolly Pirate converted to Dunkin' Donuts, which I think is a good sign. Hilltop, USA will become what it once was. The real estate is a circle.

What are your perceptions of the different ends of these corridors?

Georgesville Road has 270 and the rail line. West Broad has small bits of development. Four lots were purchased in West Broad Street (Terrace and Richardson).

What are your thoughts on redevelopment potential on west end of Broad/ redevelop Great Western Shopping Center?

Developers are eyeing West Broad moving toward the Hilltop. Because of traffic count and footprint, the west end has more potential for bigger business. One client is wanting to sell his property to a bigger business for the community. The Great Western Shopping Center was up for auction. Rents are currently “bottom feeder” pricing. It’s certainly an opportunity, but perhaps the value/price is not yet where it needs to be to make redevelopment happen.

What are your thoughts of the ability of independent businesses to fill the space on Broad Street?

Medium and larger businesses would be good for the area. In auctions, priority is being given to homeowners and cash buyers. Many of the existing buildings have serious maintenance issues that can be an obstacle for smaller businesses using existing buildings.

What do you believe is the potential for a mixed-use building at Broad Street and Westland Avenue (state offices, clinic adjacent)?

Most of West Broad Street was once mixed use—apartments above and retail below. This is a continuing trend in that area, but some developers have different visions (ex: demolishing a mixed-use building for a Dollar General).

Do you believe there is demand for light industrial/trades at the western end of Sullivant?

Industrial would need to be done tastefully. The Casino area is trying to become more retail. On Sullivant Avenue, there could be a demand for warehouse space. There is still a lot of industrial space available though. This is the least valued real estate type (\$1-\$3 per square foot). Office space would be needed next to industrial. Storage may work on Georgesville Road. It is rumored people are buying old buildings to store fancy cars in the Main, West Broad, Town Street area. Some areas are converting industrial buildings to taprooms and breweries. The Florentine Building was bought for a music hall. The Spanish community also has been opening businesses.

Where do people in this area shop?

Shoppers go to Kroger on 70/Broad next to Tim Hortons. They may also go to Galloway – Consumer Square.

What are your thoughts on the Casino?

The casino has not affected real estate as much as people hoped. People expected a huge impact on property prices right away. The reality has been a slow change, but they are growing. The City is beautifying West Broad Street. People wanted a Weston type development in the mall across the street from the casino. The area needs big investors (ex: Wexner).

History of the Hilltop.

The area is primarily residential. Growing up you could walk to retail—department stores, ice cream and drug stores. Remember going to Great Western Shopping Center as a kid.

What are Hilltop challenges?

The area is a food desert. We've been hosting community meetings with seniors (through the United West Side Coalition)—challenges for seniors: transportation issues and a lack of quality social gathering spaces. There is no neighborhood bar, and the housing stock is primarily occupied by renters. There is a significant senior population and most of the housing stock is two-story. There are safety concerns, and safety is continuing to decline. Parking is an issue on Broad Street, east of Hague. Traffic flow is constricted, and on-street parking was reduced by recent city "improvements" bike lanes etc. This has been a challenge for businesses.

How has the Hilltop changed?

- Seen a lot of demolitions in recent years due to blighted properties obtained through the land bank process.
- Central Hilltop has been historically segregated. South of Broad is not as safe and has less quality housing stock and generally smaller homes and lots than North Broad.
- Target left and that hurt. The Kroger on Wilson, which is the only grocery store in the area, is not perceived as safe—many homeless people there.
- The opioid epidemic—there is a large addicted population. The UWSC has begun an effort to give people a path out of addiction
- Food gardens are growing in popularity.

What could the Hilltop benefit from?

- Attract businesses – safety, transportation, and appearance are biggest factors.
- Would like to see city code changes—allowing for "granny flats".
- Transportation needs improved, frequency. There is a large senior and poor population whose needs are not

adequately met. It's hard to get to/from a grocery/big-box store. Shuttles downtown. There is a demand for smaller vehicles (transit). Some needs could be met by on demand services.

- Dedicated parking. The city could look for ways to provide public off-street parking that would serve multiple establishments
- Improve cleanliness—clean up trash, remove signs on telephone poles—the City should be more proactive about this and pursuing other code violations. The Hilltop has an image problem. This would help.
- There are so many storage places. In terms of industrial, an online shipper space on Sullivant Avenue may be good—something to bring employment to the area.
- The area would benefit from a major institution. A thought for the mall site would be a satellite OSU Facility or education facility, something to attract young people. The area needs an anchor.
- Mixed-use along the corridors could be successful.
- Multiple food vendors in one place—there are so many food carts in the area. Craft breweries.
- A grocery store that could deliver groceries to seniors.

Banking and Finance Interview

Do you provide many services to small business in the Hilltop?

No, there is not much business development activity in the Hilltop. A lot of people do not know about the Small Business Development Center. The Center has no funds for marketing,

so much of their clientele is referral/word of mouth. The Hilltop needs to know about us. People do not know where to go for small businesses resources. This keeps people from getting started. The center is now forming an initiative to deliberately expand awareness.

What types of businesses do you see starting (generally)?

Landscaping, cleaning, non-medical transportation

What types of businesses do you see starting in Franklinton?

Microbreweries, metal working—The City has provided this area with a lot of resources, and millennials are attracted to this area. The City has targeted this area for improvement. This also happened on Parsons Avenue. It will take a corporate and public entity effort to see a shift like that in the Hilltop. Because there is no big business there, you need to help the small businesses grow. You need to find out what resources they need.

What are opportunities you see?

Help connect people to resources that exist. Address aesthetics of the area, negative perceptions. Identify existing business that could be a catalyst. Ethnic markets/ international theme has potential. There are many of these in the region that are successful. Yet there are cultural barriers. Some minorities are reluctant to seek help.

You need to overcome perception. Aesthetics is a problem. Who's going to be the first to go there? Once someone does, that will trickle down. You need to tell the story, flip the narrative (the positive side of the Hilltop). You can live within 2 miles of Franklinton for an affordable price. Franklinton is chic now—once was "The Bottoms"—need to feed off that. If the City and private partners were to really focus on this area (as they've done in Franklinton) it could be transformative.

Non-Profit Small Business Banking Interview

Why did the markets choose their locations?

Currently working with two markets, the Asian International Market which will be located on Broad Street (leasing an old big box)—will have a food court, groceries and other goods; and the Hispanic International Market (Plaza Tapatia) on Georgesville Road—will be over 40,000SF. Both markets are about four years in the making. Plaza Tapatia is being built on the same site as an existing market. The owner has had the land for years. Both businesses are wholesalers and need access to the

freeway, but also because the value of land there is so much cheaper.

A lot of family owned businesses are on the West Side. The West Side has its own personality—the working poor, multi-generational Caucasian families. The area has always lacked a grocery store. La Tapatia is filling a need (providing grocery, various prepared food vendors, and community space). Revitalization is slow. There was a lot of miscommunication during the development of the casino—people bought land, thought they'd get rich quick, but they have calmed down now. The Franklin County Smart Growth Overlay has also slowed development—it is hard to build a grocery store that meets those requirements.

How do people find you?

Word-of-mouth. I'm out meeting a lot of people—mentoring, advising, consulting. I am a connector. I help other people find resources or other people they need. I help attorneys, small businesses owners and developers.

What changes have you seen in the West Side?

The casino has cleaned up the area with trees and beautification. They have also gotten rid of the undesirable uses (ex: strip clubs and tobacco retailers). The old mall is ugly. People do not have a meeting place anymore. This Hispanic market being built will have a meeting space.

Could a cluster of international businesses be successful?

There are a lot of foreign people and they are employing people, but it is many people don't feel comfortable going to these places if you do not have a reason to be there.

What do you think about food trucks?

Very much agree that there is an interest in food trucks. The food trucks do very well. The

Hispanic Market will have infrastructure for multiple food trucks.

What are the issues?

Violence is hard. There are some great businesses, but the violence makes it hard. Meeting space is critical. If there are too many immigrant businesses, people will not go there. Business owners want a quick reaction by police and fire, they want safety, and they want place for employees to be able to get food. There is a need for help for businesses. People need services that they cannot afford to go downtown for.

Neighborhood Improvement Center Interview

What are Hilltop challenges?

- Commercial properties facing issues related to bigger repair for buildings (ex: roofs, foundation, flooding), some buildings have seen little to no maintenance for decades, Broad Street buildings need a lot of work. Existing code violations on many buildings may prevent owners from investing in improvements.
- Bike lanes and restriping have caused a lot of controversy, parking
- Lost Target two years ago.
- Senior population and mass transit—frequency of routes to shopping areas (currently every hour). No bus shelters in these places. Residents travel outside of I-270 to shop (Giant Eagle on Broad St, Kroger on Georgesville Rd, Meijer on Hilliard-Rome Rd)
- Ground zero for the opioid crisis. Prostitution and safety issues between Hague and ODOT.
- Speed on Broad Street.
- ODOT is the largest institutional/government employer in area. Employees perceive the neighborhood as “ghetto” and probably wouldn't leave their campus if there were food options nearby. This perception could change.

How has the Hilltop changed?

- The casino is a decent employer but hasn't been the catalyst some had hoped.

- West Gate continues to improve (becoming more white collar, more college educated).
- East of Hague continues to decline. Police cameras on Broad have forced crime to Sullivant Avenue—Hague and Burgess. There is more vacancy between Broad and Sullivant east of Hague. More boarded up buildings East of Hague in the past two years. Nice brick buildings are boarded up. North of Broad Street is nicer.
- The Highland West Civic quarter of the neighborhood has seen improvement.
- There have been recent investments—a dentist/doctor office renovating a brick building east of Hague; Wheaton Ave has a 275-unit senior housing development coming in.
- Broad Street has an advantage because of the huge right-of-way—could have more bike lanes and dedicated bus lanes to influence development (be TOD-like—condos on a commercial street with transit). Broad Street also has one of the busiest bus lines in the city (this could be an opportunity for another 'BRT' route like the CMAX that COTA launched this year between Downtown and Westerville).
- Roadway character influences what happens around it, so improving the right-of-way of Broad Street could have a big impact.

City Leadership Interview

What's New in the Hilltop?

Capital Improvements have taken place (ex: broad street bike lanes)—those improvements will continue. Redevelopment is happening on Wheatland Avenue, and a developer is currently looking for a site to build a pre-k center and possibly a Reeb Avenue-type facility (South Side Learning & Development Center, Reeb Avenue Center). The City will be looking to potentially convert one-way streets in the area to two-way streets and provide more traffic calming measures. This could help with commercial viability in some locations.

How Can the Hilltop Be Improved?

We need to figure out how to pull from the energy around the casino, but the Westland mall area owner does not want to annex into the City. Beautification efforts will be taking place in the Broad Street and 270 area to become a gateway.

What are the challenges?

Prostitution—the City current conducts sting operations to help get these individuals off the streets and rehabilitated. This type of work will start up in the Hilltop area—targeting Sullivant Avenue. The Hilltop is ground zero for both selling and using opioids. Safety seems to be an issue that businesses mention more so than residents.

What are the opportunities?

The Hilltop's proximity to downtown the casino is an asset. There are opportunities for shared parking lots (like what the Short North had before what it is now). The City is looking to revamp the NCR program, perhaps allowing other types of improvements, or funding projects within a larger area from the

What opportunities do you see?

- Places to eat, small version of the Short North.
- Diversity is an advantage. There is existing nice housing stock including doubles.
- As the population grows in the downtown, the expectation is that growth will radiate out—not sure how skipping over 315 will work. Not everyone wants to live downtown. Access is a benefit—can be downtown in 10 minutes on the bus.
- Need a nucleus of activity that is obviously visual to spark interest. Broad Street frontage is largely intact, just need redeveloped. Redevelopment will probably not occur linearly along the entire stretch of Broad from Franklin. It will most likely occur at nodes/key intersections.

main corridors. The fact that the program is a reimbursement grant is an obstacle to some. The Hilltop could be a pilot area for the revamped, improved program.

The City wants to build capacity among local businesses to make them self-sufficient. For example, Special Improvement Districts (SIDs) have improved other areas in Columbus, such as Morse Road, but the Hilltop does not have enough businesses to pay into something like that. The City has supported catalytic projects, but they acknowledge these are only successful when there is a broader revitalization strategy.

Broad Street has potential for authentic and local services and offerings. Food is the new art, and Columbus has a big food scene. The ethnic diversity in the Hilltop could be expressed on Broad Street. The fact that the Hilltop has two corridors is an asset. Nodal retail development with high density residential in between would be good. The corridors need to be mixed-use to be viable. The housing stock in the Hilltop is much better than some of the other, hard-hit neighborhoods in Columbus. There may also be a higher household income than other areas, such as Linden and the South Side.

What are the Differences Between Broad and Sullivant?

Broad Street is mostly goods and services-centric, and Sullivant is mostly more food and bars-centric. This is also true on these roads in Franklinton.

What Have You Heard from the Community?

Some people are interested in branding the Hilltop's districts/neighborhoods. The Hilltop top is very large. There is some desire to embrace the different areas unique identities.

Economic and Community Development Interview

What is EDCI?

EDCI started in Columbus in 2004. It is a short-term/micro and small business lender. They also provide training services, including specialized programming. EDCI is starting to do more place-based work. Money to lend is not an issue—the problem is getting people qualified and getting willing participants. EDCI has done lending on the West Side.

How do people find out about EDCI?

EDCI does not spend a lot of time on marketing. Most people hear about us through word-of-mouth or referrals from municipalities or banks/credit unions.

What does EDCI's portfolio look like?

Now, \$15 million. \$45 million from the beginning. Average loan is \$28,000 ranging from \$1,000 to \$350k (larger loans are for established businesses)

EDCI employees?

50+ staff with 30+ located in Columbus

Anything else?

EDCI also has a commercial kitchen and food truck commissary, as well as women-based business resources. Initially 70%-80% of EDCI users were immigrants. EDCI has not had a lot of Hispanic users—this may be because they need to build trust. This is an opportunity area.