

City of North College Hill, Ohio

Business District Study



North College Hill Municipal Building
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April 2006

North College Hill Business District Study

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Introduction

This study was conducted by Hamilton County Development Company on behalf of the City of North College Hill with funding provided by Community Development Block Grant funds granted by the Hamilton County Board of County Commissioners. The aim of the study is to investigate the current physical, social, and market conditions of the business districts in North College Hill, and make recommendations to sustain and foster their current and future economic vitality.

Existing Conditions

Location

The City of North College Hill, Ohio (NCH) is an inner-ring community located in Hamilton County. The City is centered on the intersection of West Galbraith Road and Hamilton Avenue. Ronald Reagan Cross County Highway (SR126), intersecting the community along its northern boarder, offers direct access to the region via I-275 and I-75. The City of Cincinnati lies to the South, the City of Mount Healthy is to the North, while Colerain Township and Springfield Township are to the West and East respectively.

Existing Land Use

NCH displays land use distributions often found in bedroom communities, such as relatively high residential use (58.1%) and a low allocation of office property (1.5%). Public/Semi-Public (11.2%) and Parks & Recreation (10.5%) land uses occupy the second and third highest percentage of land. A majority of the commercial land use is found centered along Goodman Avenue, along West Galbraith Road west of Hamilton Avenue, and along the entire span of Hamilton Avenue. These commercial business districts are discussed at more length later in this report. Large tracts of land are occupied by governmental, institutional and educational uses located generally in the center of the community just north of W. Galbraith Road. There are very few vacant parcels. The residential areas are primarily single-family in nature with a few multi-family uses located near the commercial districts.

Clovernook Country Club, an 18-hole golf course with clubhouse, swimming pool, and other amenities marks the Southwestern corner of the City.

North College Hill Land Use Distribution

Existing Land Use	Percentage
Single Family	50.1%
Public / Semi-Public	11.2%
Parks & Recreation	10.5%
Commercial	5.7%
Vacant	5.5%
Multi-Family	4.4%
Institutional	4.0%
Educational	2.1%
Congregate Housing	1.9%
Two Family	1.7%
Office	1.5%
NA	0.8%
Unknown	0.6%
Public Utilities	0.1%
Mixed Use	0.1%
Light Industrial	0.0%
Total	100.0%



Single Family House in North College Hill

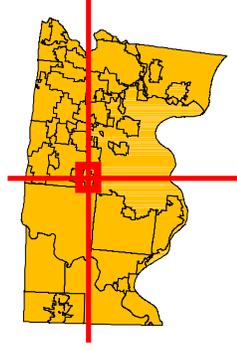


Clovernook Country Club

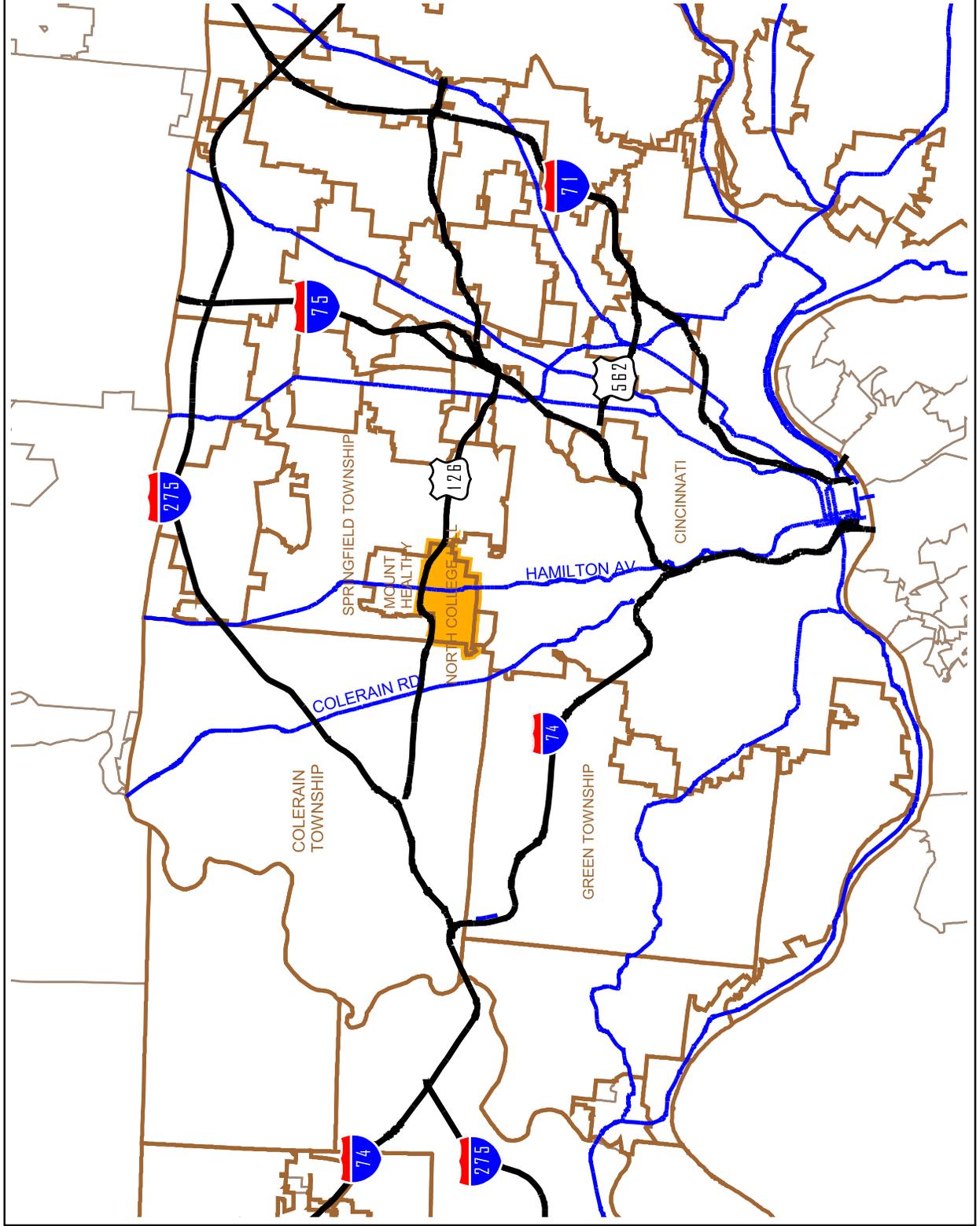
Location Map North College Hill



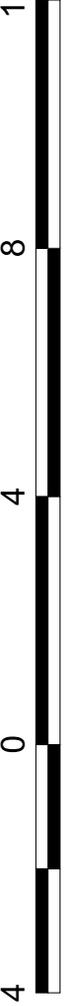
- Streets
- Interstate
- Streets
- US & State Routes
- Regional Cities And Townships



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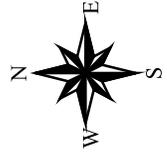
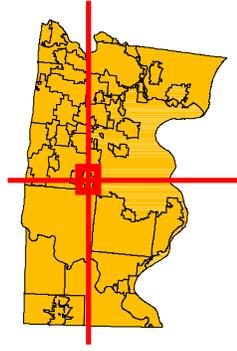
12 Miles



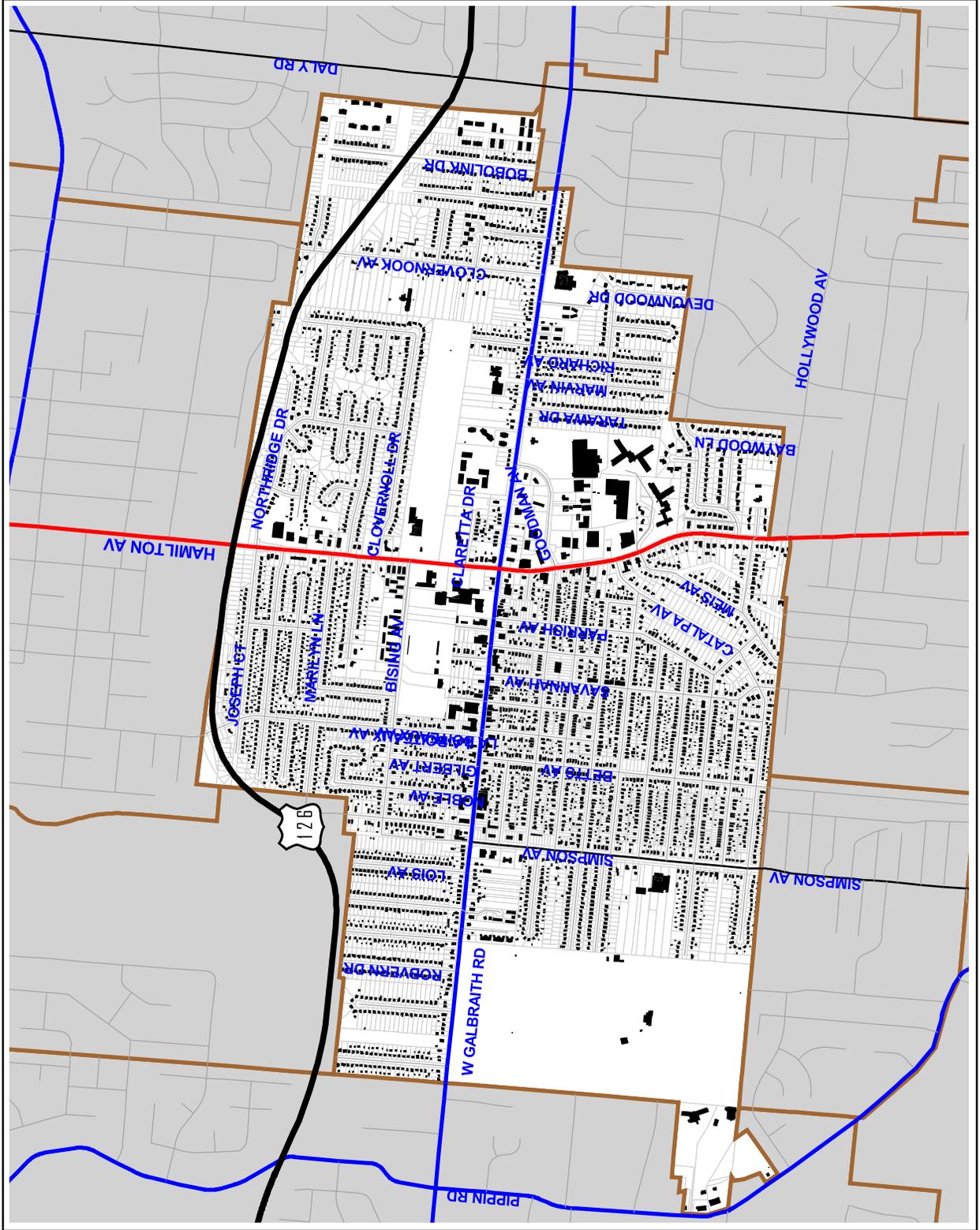
Base Map North College Hill



- Streets
- Local (TBV)
- Interstate
- US & State Routes
- Arterial Roads
- Collector Roads
- Local Streets
- Highway Ramps
- Buildings
- Railroads
- Parcel Polygons



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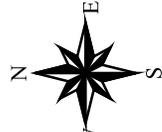
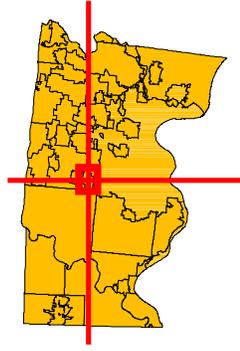


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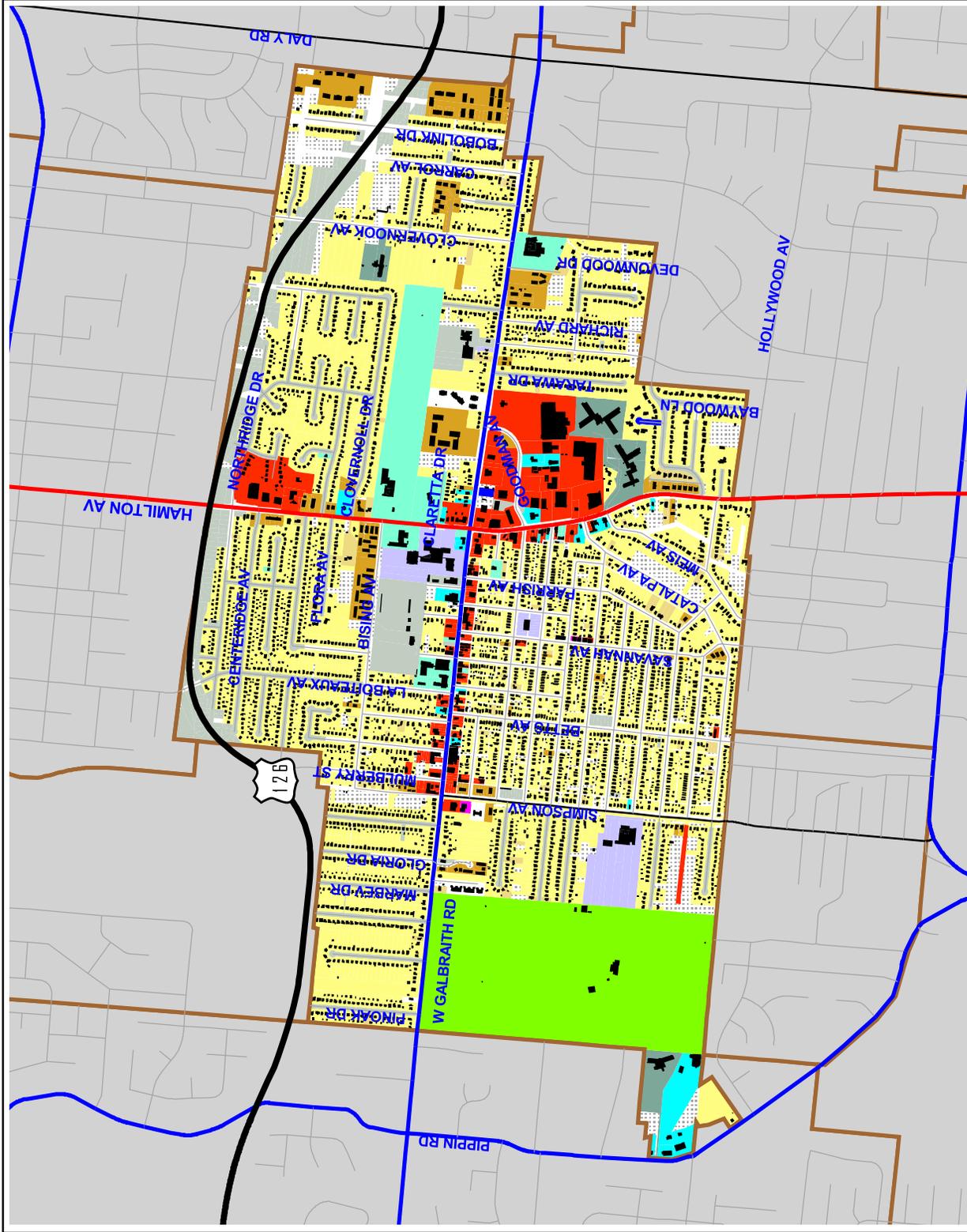
Existing Land Use North College Hill



- Streets
- Local (TBV)
- Interstate
- US & State Routes
- Arterial Roads
- Collector Roads
- Local Streets
- Highway Ramps
- Buildings
- Parcels
- Polygons
- Agriculture
- Vacant
- Single Family
- Two Family
- Mobile Homes
- Congregate Housing
- Multi Family
- Mixed Use
- Office
- Public/Semi Public
- Commercial
- Light Industrial
- Heavy Industrial
- Educational
- Institutional
- N/A
- Public Utilities
- Parks & Recreation



12/2005



1000 0 1000 2000 3000 4000 5000 6000 7000 Feet

Traffic Counts

Average daily traffic counts (ADT) were collected by the Hamilton County Engineer for Cross County Highway, Hamilton Avenue, and W. Galbraith Road and are shown on the map. A traffic count report detailing the Hamilton Avenue and Galbraith Road intersection was conducted in August 2005 specifically for this Corridor Study.

The ADT map displays the major roadways in colors based on the intensity of traffic. Ronald Reagan Cross County Highway has the highest traffic counts at 39,610 in a typical day. Hamilton Avenue traffic counts are at 31,250 near Cross County and decline to 22,900 just north of Galbraith and 21,300 south of Goodman Avenue. W. Galbraith Road traffic counts are highest just east of the intersection with Hamilton Avenue at 20,300. The counts then decrease to 11,837 to the west and 13,400 further east of Goodman Avenue.



Traffic on Hamilton Avenue near Cross County Highway

Zoning and Development Regulations

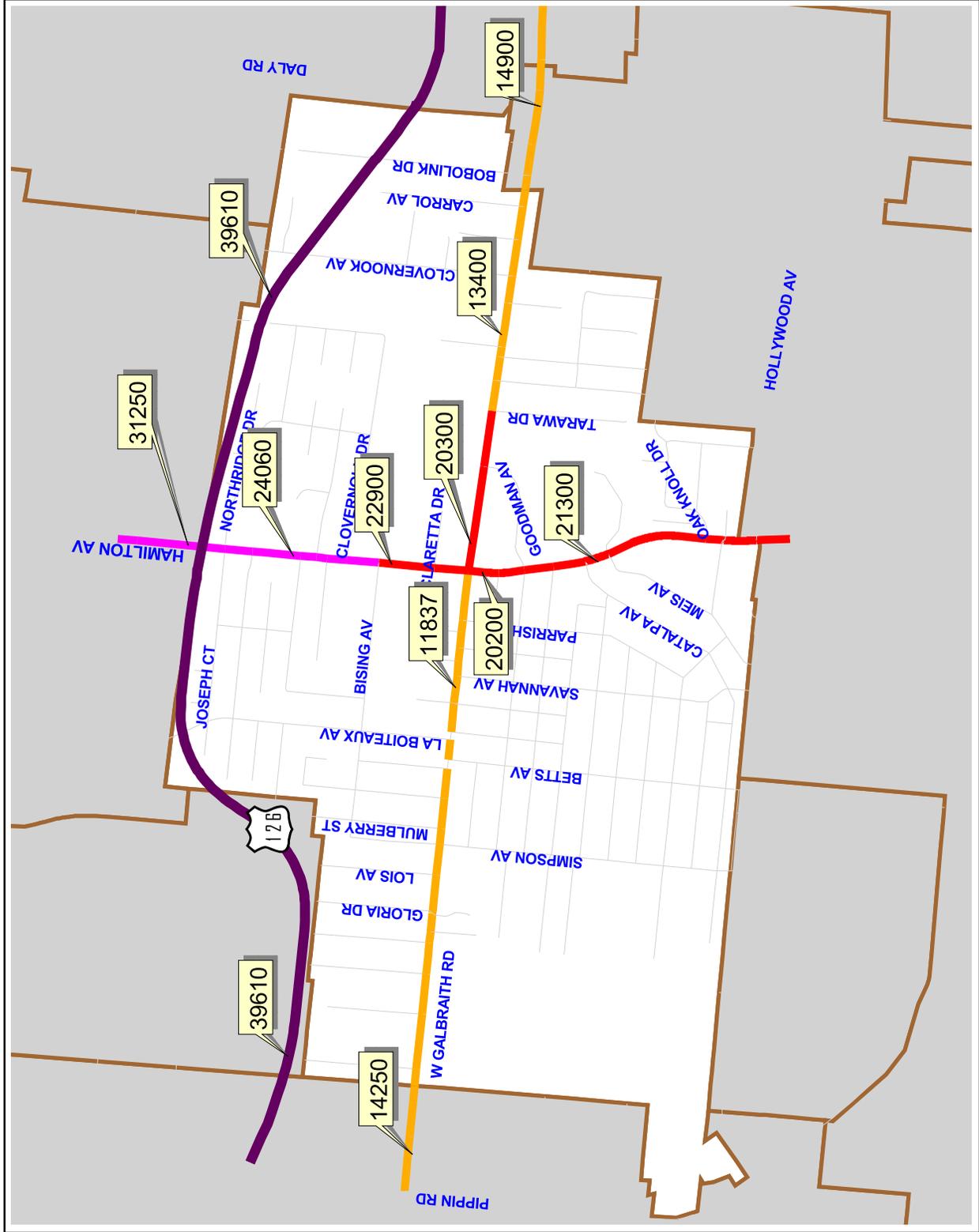
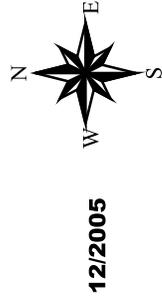
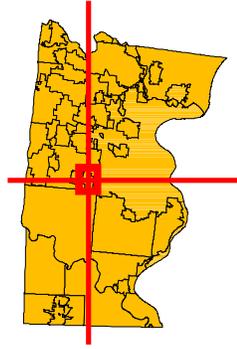
A zoning map approved in 1999 and last updated February of 2005, displays the approved zoning designations. Codified ordinances for the city concerning zoning administration, zoning districts and regulations, zoning standard, renewal and redevelopment are available by contacting:

Jerry Thamann, Safety Service Director
1704 W. Galbraith Road,
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Average Daily Traffic (ADT) North College Hill



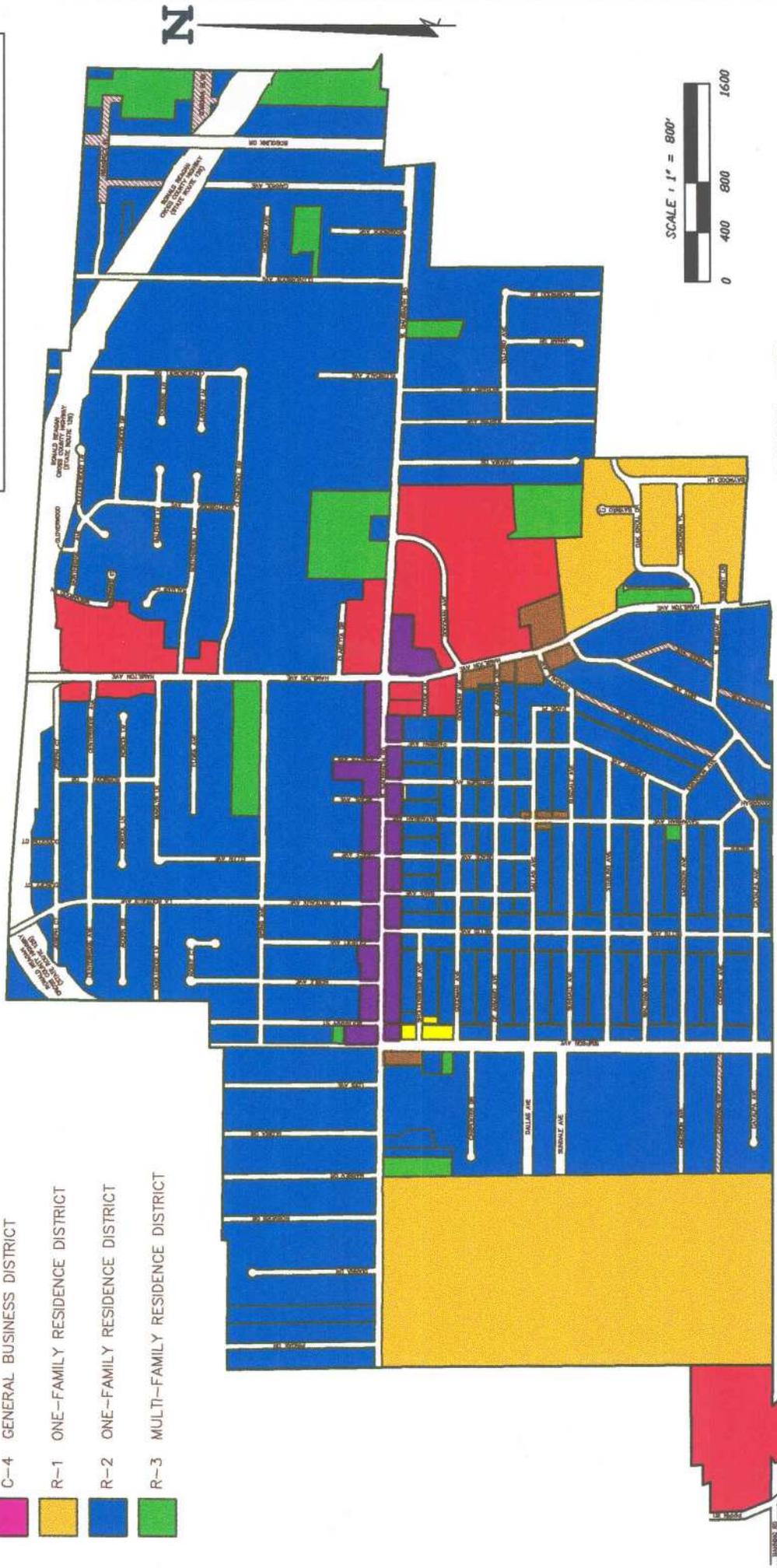
- Average Daily Traffic
- Traffic Not Recorded
 - 1 - 7,922
 - 7,923 - 15,844
 - 15,845 - 23,766
 - 23,767 - 31,688
 - 31,689 - 39,610
 - Streets



ZONING MAP CITY OF NORTH COLLEGE HILL HAMILTON COUNTY OHIO

- CO-1 PLANNED BUSINESS DISTRICT
- CO-2 PLANNED BUSINESS DISTRICT
- C-1 NEIGHBORHOOD BUSINESS DISTRICT
- C-2 OFFICE DISTRICT
- C-3 CENTRAL BUSINESS DISTRICT
- C-4 GENERAL BUSINESS DISTRICT
- R-1 ONE-FAMILY RESIDENCE DISTRICT
- R-2 ONE-FAMILY RESIDENCE DISTRICT
- R-3 MULTI-FAMILY RESIDENCE DISTRICT

ORDINANCE NO.	TITLE	ADOPTED
3-2001	7100 BLOCK OF HAMILTON AVE.	2-5-01
5-2002	REZONE RESIDENTIAL DISTRICTS	2-19-02
10-2003	GALBRAITH & MULBERRY	7-7-03
3-2004	GALBRAITH & HAMILTON	2-2-04
2-2005	GALBRAITH & GOODMAN	2-7-05



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 ENGINEERS • SURVEYORS • LAND PLANNERS • CONSTRUCTION MANAGERS

APPROVED BY NORTH COLLEGE HILL PLANNING COMMISSION MARCH 9, 1999
 APPROVED BY NORTH COLLEGE HILL CITY COUNCIL JUNE 7, 1999 ORDINANCE NO. 9-1999

Business Districts

The commercial areas of North College can be viewed as three business districts which each have their own distinctive physical characteristics.

North Hamilton Business District

This area has experienced a great deal of new investment recently but retains a residential feeling. It is the new kid on the business block. Located just south of Cross County Highway exit along Hamilton Avenue, this stretch of road has the highest traffic counts in the city. Recent roadway median improvements by the business association and well maintained sidewalks, curbs and gutters compliment the overall residential feeling of the district.

The district is marked by the development of a new Kroger in the northern most boundary, single and multi-family residential uses in the center, NCH High School and Clovernook Center for the Blind and Visually Impaired near the south end and the PNC bank location on the Northeast corner of Hamilton Ave. and W. Galbraith Rd. In many cases multi-family residential serves as a buffer between other residential and commercial land uses.



New Kroger Building near Cross County Highway

Due to the success of Kroger, high traffic counts, and zoning classifications it is reasonable that this area will experience development pressure in the future. Several properties were listed for sale and have changed ownership while this study was being conducted. Instances of common ownership of property and larger parcel sizes along Hamilton Avenue are likely to glean interest from developers.



Apartment Building Across the Street from Kroger and Perkin's Restaurant



Multi-family Buildings South of Kroger Along Hamilton Avenue

The PNC Bank is located on the northeastern corner of Hamilton & W. Galbraith. The site is owned by Walgreen's. It is anticipated that the site will be redeveloped in the near future which will relocate the existing Walgreen's found 2 blocks to the south on Hamilton Avenue. The new facility will co-locate with PNC Bank having designated space within the pharmacy. As one of the four corners of the Hamilton and W. Galbraith intersection, this is a pivotal project. It is a key location that will impact the character of the entire community.



Cloverbrook Center for the Blind and Visually Impaired on Hamilton Avenue

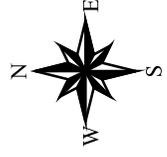
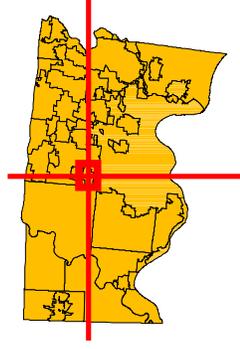
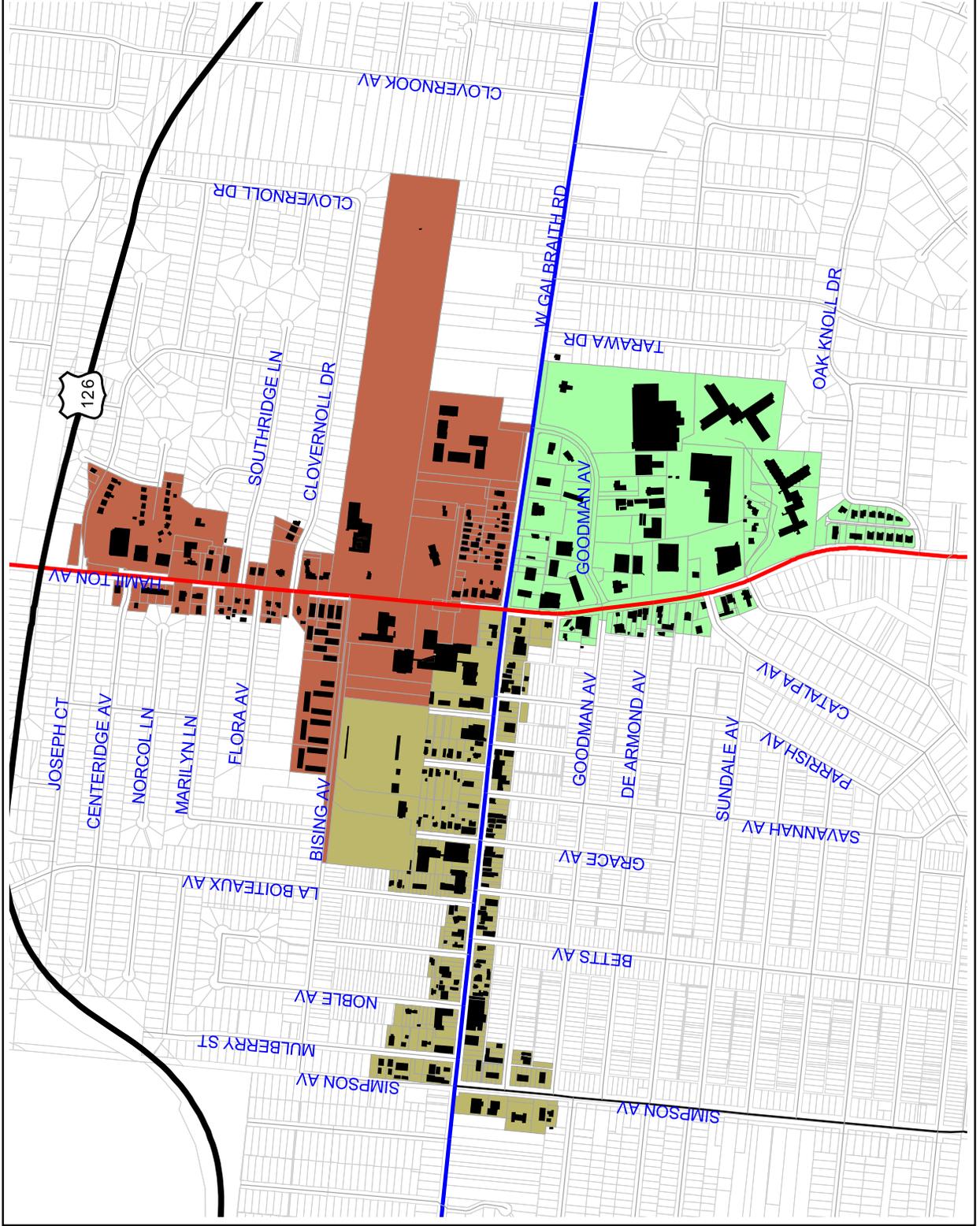


PNC Bank Location on NE Corner of W. Galbraith Road and Hamilton Avenue

Business Districts North College Hill



- Streets
- Local (TBV)
 - Interstate
 - US & State Routes
 - Arterial Roads
 - Collector Roads
 - Local Streets
 - Highway Ramps
 - Cbuildings.shp
 - Business Districts
 - North Hamilton Business District
 - Goodman Business District
 - West Galbraith Business District
 - Parcel Polygons



12/2005



Goodman Business District

The Goodman Business District is located in the Southeastern section of North College Hill. It is almost entirely composed of retail commercial uses. Goodman Avenue runs through the middle of the district and serves as a major access road connecting Hamilton Avenue to W. Galbraith Road. Fast food and restaurants occupy the northern portion of this business district. The buildings and companies increase in size to the South. The former 70,000 sq.ft. Thriftway grocery store and 27,000 sq.ft. Big Lots “big box” buildings currently stand vacant.



Commercial Retail Building along Goodman Avenue

There are many shared access concerns in this district. Lack of visibility is also of great concern. The design is similar to development along Colerain Avenue yet it lacks the direct highway access, visibility, and critical massing to compete with the neighboring Colerain Avenue. The large vacant buildings are essentially in the back of the district and not easily visible.

There is a mixture of building types and businesses along Hamilton Avenue. Aging buildings front the roadway, access is generally confusing, and shifting topography limits views into the area.

Creative reuse of the larger sites is encouraged. Flexible office, light manufacturing and smaller retail out-lots could be possible in a redevelopment scenario. Consolidation of land into larger parcels will allow more flexibility in parking, building, and roadway access. Aesthetic improvements and updating of façades should be encouraged on older buildings in the area.



Vacant Thriftway on Goodman Avenue



Topography Change Along Hamilton Avenue

Hamilton Avenue and W. Galbraith Road Intersection

The intersection of Hamilton Avenue and W. Galbraith Road marks the center of North College Hill geographically, physically, aesthetically, and commercially. It demarcates the transition from each of the three business districts. These four corners are the most valuable locations in the City. Each corner has its own distinct character.

Northeastern Corner

This corner is currently occupied by PNC Bank. This 1.48 acre site was purchased by Walgreen's and plans are to demolish the existing bank, build a new pharmacy and co-locate the PNC Bank to a new location on this site. The current building is located close to the corner with cleared land on the sides and to the rear.

Northwestern Corner

The Northwestern corner is home to the 1800's Laboiteaux-Cary Cemetery and the neighboring Kemper professional building.

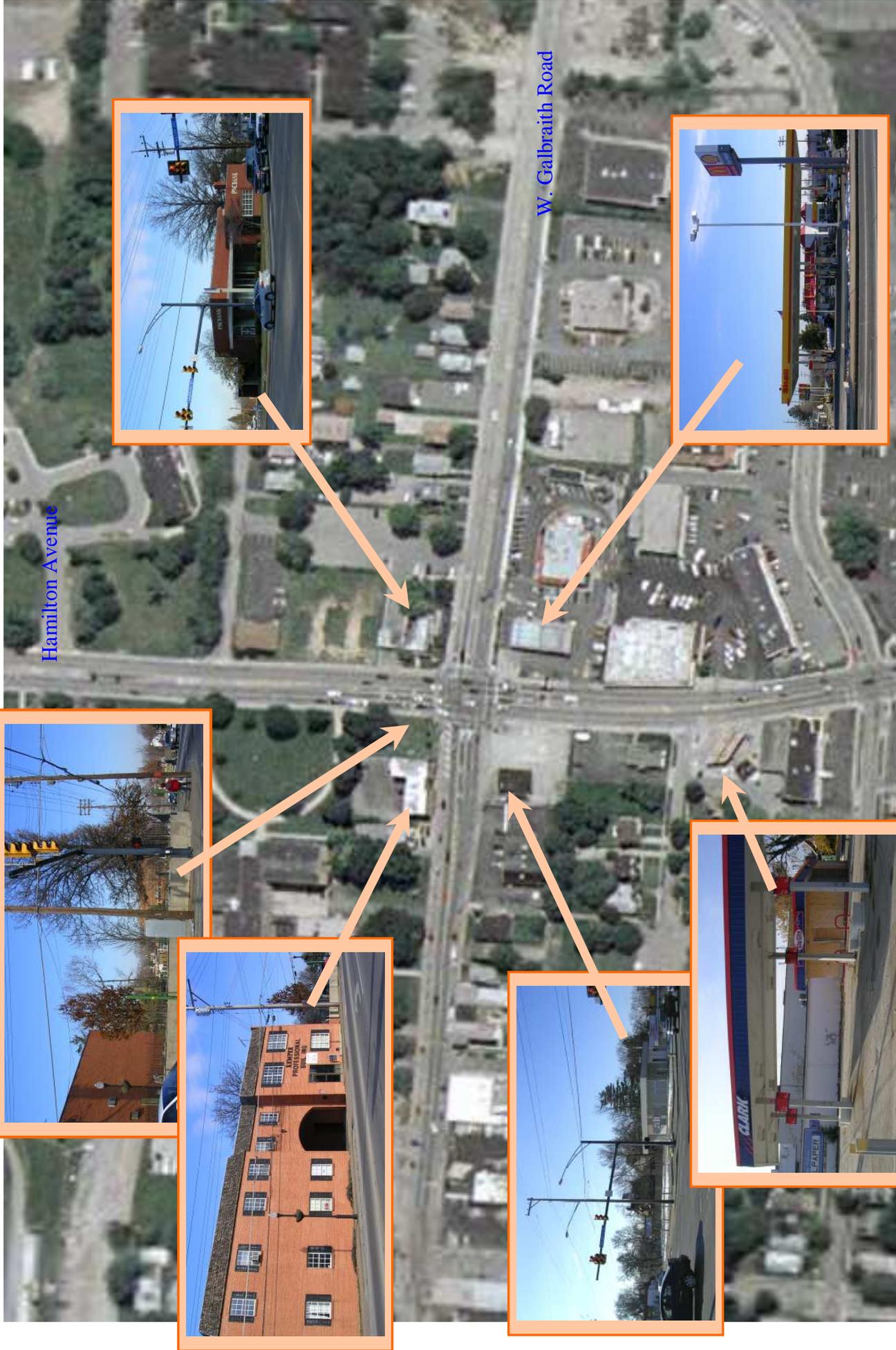
Southeastern Corner

A Shell gasoline station is on this corner and is co-located with a McDonald's restaurant. The McDonald's lease will be subject to review in 2006.

Southwestern Corner

This property was recently purchased and will be the future home of the Greater Cincinnati Credit Union. An abandoned Clark gas station is available just south of this site.

Hamilton Avenue & W. Galbraith Road Intersection



W Galbraith Business District

The W. Galbraith Business District is the historic mainstreet of North College Hill. Characterized by many quaint shops and restaurants on small lots, the area has benefited from the recently completed streetscaping project. Completion of the Ronald Reagan Cross County Highway in the late 1990s reduced commuting traffic along W. Galbraith Road. The district is marked by office, municipal center, and educational uses on the north side of Galbraith Road and small shops such as bakeries, cafés, and clothing stores on the south side.



Various Small Businesses Along W. Galbraith Road



Streetscaping Improvements & Street-side Parking on W. Galbraith Road

The district is on a human scale exhibiting many elements of neo-traditional urban design. The district encourages walking. Sidewalks are well marked and maintained. Parallel parking is clearly demarcated and serves as an effective barrier between vehicular and pedestrian traffic. Buildings tend to be smaller and are often built right up to the public sidewalk. Lots on the south-side of the street are rather shallow and additional access is provided by an alley that runs the length of the business district. Auto oriented businesses can be found at the western edge of the City.



St. Margaret Mary Church & School

The NCH municipal center and public service facilities are also along W. Galbraith Road near the center of the business district. A building once used for office use and a dry cleaner were recently purchased by the city. A portion of the building has been renovated and used for city government offices and a contract post office.

A blighted multi-family building located at 1720-1714 W. Galbraith Road was recently demolished by the city just west of the municipal center. This parcel of land is in a prime location and could easily support a small professional services office use.



Site Recently Cleared by City for Redevelopment

Parking is available along the street and in various public/private lots along the length of the district. Public Parking signs like the one shown in the picture clearly mark their location.



Clean & Clear Public Parking Signage

Institutions such as the NCH High School and St. Margaret Mary's church dominate the north side of the street near Hamilton Avenue.



NCH High School

Demographic Analysis

When examining a community's current business mix and considering opportunities for new business, it is useful to analyze the area's demographics. Determining the market area, identifying the population residing in the area, generalizing the general socio-economic status, tracking residential spending habits, and estimating local business sales grant insight as to successful new development. For this analysis, mapping information from the Cincinnati Area Geographic Information System (CAGIS) and the most recent demographic data from Claritas Inc., as of the writing of this report (2005), will be presented. A table of demographic data is provided in Appendix A of this report.

City of North College Hill

As can be seen on the NCH Market Area Map, the city is roughly a one mile radius area surrounding the intersection of Hamilton Avenue and Galbraith Road just south of SR 126 (Ronald Reagan Cross County Highway). Based upon total commercial square footage, the area is considered to have a neighborhood shopping center by Claritas. A majority of the residents of the city make use of the community businesses to meet their daily shopping needs due to their close proximity. Several unique stores may pull customers from the region but on the whole the businesses primarily support the local community.

North College Hill Market Area

The North College Hill Market Area is a three mile radius area surrounding the intersection of Hamilton Avenue and Galbraith Road. This is generally the area within approximately a 8-10 minute drive time from the center of the North College Hill shopping district. There are several other competing shopping centers within the three mile radius. Residents within this radius are considered to be a part of the North College Hill Market Area. Businesses compete for shoppers who are equal distance from each shopping center. These customers make decisions based on specific factors rather than pure convenience.

Hilltop Plaza, listed as a community shopping center, is located 1.5 miles north on Hamilton Avenue in Mt. Healthy. Brentwood Plaza is roughly 1.5 miles to the northeast along Winton Road in Springfield Township. A large cluster of super-regional, regional, community, and neighborhood shopping centers are located on Colerain Avenue, approximately 2.5 miles to the northwest of North College Hill. Colerain Avenue is clearly the dominant shopping location in the area in terms of sheer volume, infrastructure, and traffic counts. Centered around the Northgate Mall, this area attracts customers from a large portion of the surrounding area. Yet the sheer size and level of traffic can in effect repel customers and make the smaller shopping areas more attractive.

Demographic Summary

North College Hill

3 Mile Market Area

Population

Younger and Older	More Average Age but still Slightly Younger
Owner Occupied Housing (68.8%)	Owner Occupied Housing (65.4%)
Affordable Single Family Housing (\$98,016 Median)	Affordable Single Family Housing (\$108,240 Median)
More Production, Sales, Office Workers	More Production, Sales, Office Workers
Less Professional and Financial Workers	Less Professional and Financial Workers

Effective Buying Income

Compact Population (5,156/sqmile)	Compact Population (3,183/sqmile)
Close to Twice (195.9%)the County Average in Density of Buying Income	134.7% County Average in Density of Buying Income

Consumer Buying Power

Density of Buying Power 231.7% of County Average	Density of Buying Power 149.7% of County Average
Lowest spending on Book Stores, Luggage and Leather Goods and Jewelry	Lowest spending on Book Stores, Luggage and Leather Goods and
Highest Spending in Gas Stations, Convenience Stores, Health & Personal Care	Highest Spending in Gas Stations, Convenience Stores, Health &

Business Sales

\$1 Billion in Estimated Business Sales	\$1.2 Trillion in Estimated Business Sales
44.52% of Residential Spending	104.63% of Resident Spending
Net Attractor of Spending in Eating & Drinking Places	Net Attractor of Spending in Auto Dealers and Service Stations,
Very Low Retention of Residents' Clothing & General Merchandise Spending	Lower Retention of Residents' Clothing & General Merchandise

Business Establishments by Industry

More Retail, Personal Services, and Educational Services	More Retail, Social Services
Less Manufacturing and Wholesale Trade, Business Services, Legal Services	Less Manufacturing

Business Establishments by Industry

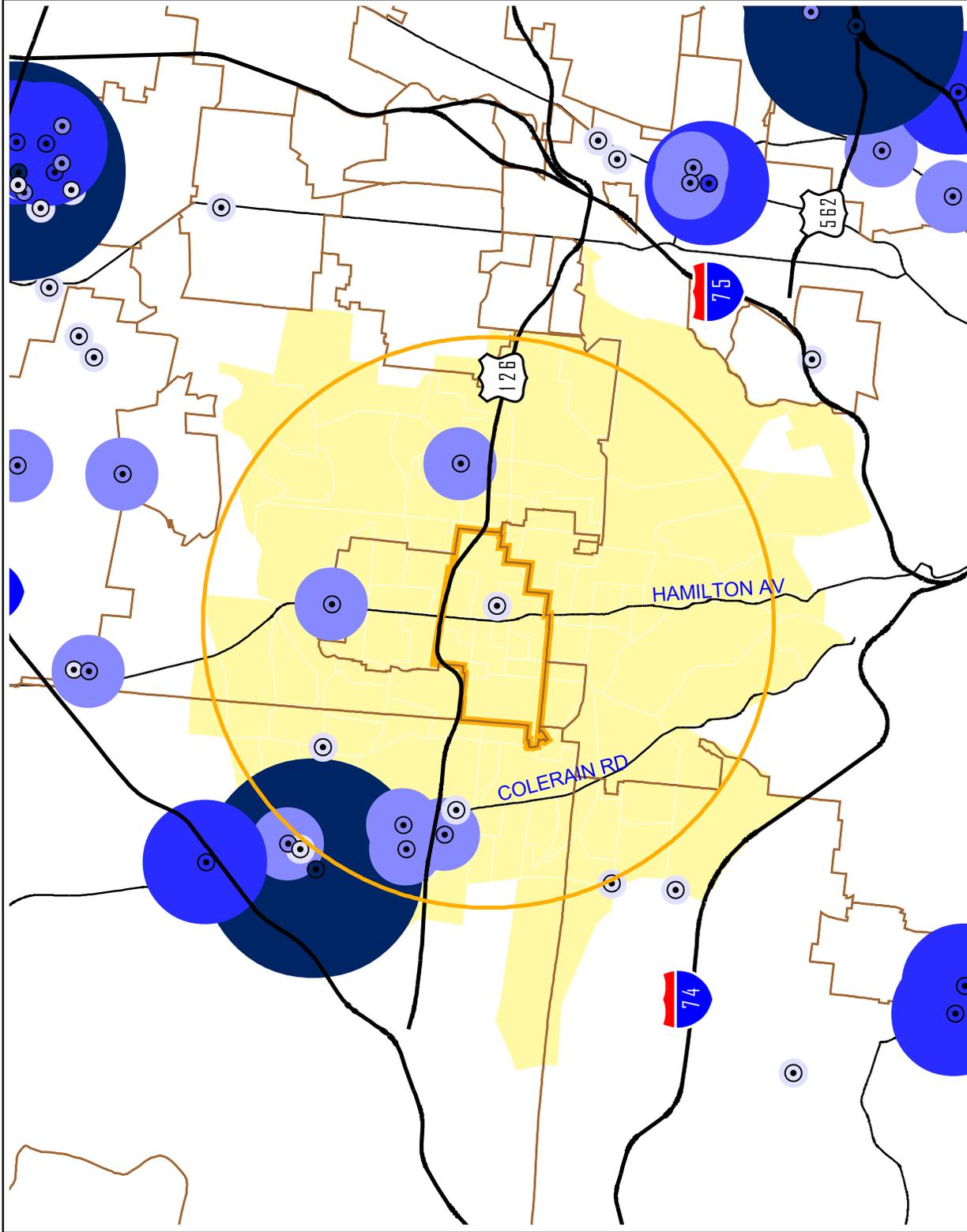
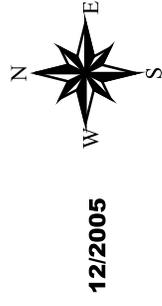
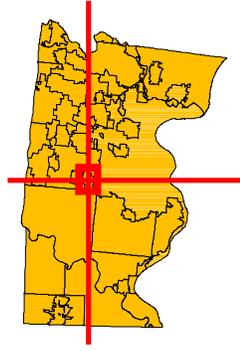
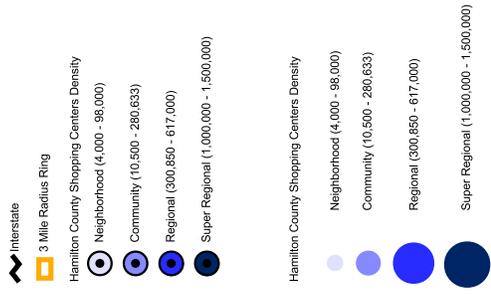
More in Food Store and Eating & Drinking	More Auto Dealers & Service Stations
Less in Building Materials & Garden Stores, Auto Dealers & Service Stations	Less Home Furniture Stores

Employees by Industry

More in Government Sector, Services, Educational	More in Government Sector, Services, Educational
Less in Private Sector, Finance, Manufacturing, Transportation and	Less in Private Sector, Finance, Manufacturing, Transportation and

Source: Claritas, 2005.

North College Hill Market Area North College Hill



North College Hill Demographics

Population Characteristics

In general, the population has a tendency to be slightly younger with an above average percentage of older widowed homeowners living in affordable single-family housing. The median age of 37.6 for NCH was slightly lower than the County average of 38.2. The percentage of population widowed was 9.67% compared to 7.32% for the County and median value owner-occupied housing was valued at \$98,016 versus \$122,736 for the County. There were a higher percentage of owner occupied housing units in the area 68.80% than the County at large (60.63%).



Single Family Residence in NCH

Workers residing in North College Hill tend to have occupations that are considered more blue collar than the rest of Hamilton County. A larger percentage work in production, sales, and office occupations and a lower percentage of workers are employed in professional and financial occupations.

Effective Buying Income

Effective buying income is the income minus personal taxes. NCH has a very compact population with an aggregate effective buying income density which is almost twice the county average. The population for North College Hill was 9,466 which equates to density of 5,156 per square mile. The population density for Hamilton County is 1,995 people per square mile. This reveals that NCH has more than twice the density of the most areas in the County. The same relation exists for the number of households and housing units. This contributes to an aggregate effective buying income of \$85.2 Million per square mile which is approximately twice the county figure of \$43.5 Million per square mile. The average household income was \$48,610 with the average household effective buying income recorded at \$39,004.

Consumer Buying Power

Claritas collected estimated consumer buying power by retail store type which equates to the estimated purchases made by residents on consumer items for the year 2005. These are not the total sales in the community by businesses but only track the spending of residents.

The estimated consumer buying power for all retail stores was \$54.2 million per square mile for NCH, which is 231.70% of the county average of \$23.4 million per square mile. Aggregate buying power was lowest versus the County average in the categories of book stores (172.22%), luggage and leather goods (173.67%), and jewelry stores (178.44%). Aggregate buying power was highest for gasoline stations (257.15%), convenience stores (256.08%), health & personal care stores (253.79%), grocery store (251.17%), fast food

(245.16%), warehouse clubs & superstores (241.61%), and automotive part, accessories & tire stores (240.51%).

Estimated Business Sales

Estimated sales by industry type are also available for the current year. This is the estimated amount of sales generated within the geographical area for the current year. As a percentage of total sales NCH had a lower percentage of total sales in the following categories: building materials & garden supplies, general merchandise stores, auto dealers & service stations, apparel & accessory, and home furniture. The community had a higher percentage in comparison to the County in the categories of eating & drinking places, and miscellaneous retail.



It is helpful to get an understanding of how well the local businesses capture local residential spending and also the categories where the community is able to attract money from outside the geographic area of NCH.

As a whole the businesses of NCH were able to capture 44.52% of the amount of an estimated \$100 million (\$99,495,000) in retail spending by the community's residents. In the eating and drinking places category local businesses brought in 119.35% of local resident spending. This indicates success in attracting customers outside of NCH. Food stores yielded 32.46% of residential spending, auto dealers and service stations 19.33% and building materials & garden supplies 17.56%, apparel & accessory only 6.59% and general merchandise stores 0.70%. Miscellaneous retail brought in \$13 Million (29.34% of total retail sales) but there is no equivalent consumer buying power to compare. This would indicate that many of the sales in NCH businesses are not standard purchases that neatly summarize into one category or another.

This displays a significant opportunity for NCH businesses to capture retail spending currently being conducted outside of the community. It also shows that people are coming to the community for eating & drinking places.

Business Establishments by Industry

NCH had more retail establishments and less manufacturing and wholesale trade than the County average. Taking a closer look at the retail establishments, the community has a higher percentage of personal services and educational services and a lower percentage of business services and legal services.

Retail Establishments by Type

The community hosts fewer businesses in the building materials & garden stores, auto dealers & service stations, apparel & accessory categories compared to the County. A higher than average number of businesses is found in the food stores, and eating & drinking places categories.

Employees by Industry

Overall NCH has a lower percentage of employees in the private sector, and specifically in the finance, manufacturing, transportation, communications, public utilities, and wholesale trade industries. A higher percentage of employees than the County average were found in the government sector, and in services. Taking a look at the service sub-sector, a lower percentage of employees were in the business services, legal services, engineering and management industry sub-sectors. A higher percentage of employees were in the educational industry.

Employees by Occupation

Statistics show a lower percentage of employees work in occupations in the fields of administration and support, and trade & labor. They also show that a higher percentage of employees work in the service personnel sector. The listing below highlights the sub-sectors which deviate from the County average.

Higher Percentage of Employees by Occupation Sub-Sector

Health, Legal & Social
Educators
Technical Support
Health Care
Personal Services
Installation & Repair
Agriculture



Educators Constitute a Higher than Average Percentage of Employees

Lower Percentage of Employees by Occupation Sub-Sector

Sales & Marketing
Engineers, Scientists & Computer-Professionals
Management support
Food & Beverage
Protective Services
Construction
Craft Production
Machine Operators
Assemblers

North College Hill Market Area

The North College Hill Market Area includes the City and Census blockgroups within a three mile radius area centered on the intersection of Galbraith Road and Hamilton Avenue. The area is shaded yellow on the Market Area Map. This area represents the population that can reasonably be attracted by the businesses of NCH.

Population Characteristics

As with NCH, the Market Area is also slightly younger homeowners living in rather reasonably valued single-family housing. The widower percentage has lessened, the houses are valued at roughly \$10,000 higher, and the percentage of renters is somewhat higher than NCH.

Workers residing in the NCH Market Area have relatively the same percentage of occupations as found in NCH.

Effective Buying Income

The population density for the trade market of 3,183 people per square mile is still relatively dense compared to 1,995 people per square mile for the County but not quite as high as NCH. The aggregate effective buying income of \$58.6 million per square mile is lower than the \$85.2 million for NCH but still significantly higher than the County average at \$43.5 million. The average household income was \$57,108 with the average household effective buying income recorded at \$45,032.

Consumer Buying Power

Consumer buying power for the market area mirrors the pattern found in the effective buying income. Buying power on all retail stores was 149.7% of the County average at \$35 million/sq.mile, which is again somewhat lower than North College Hill's \$54.2 million/sq.mile.

Aggregate buying power was lowest versus the County in the same categories as NCH and higher in health and personal care stores (158.0%), grocery store(156.5%), gasoline stations(155.0%), and building material/garden equipment/supply dealers(154.7%) and convenience stores (154.4%).

Estimated Business Sales

Sales were lower than the County average in the building materials & garden supplies, home furniture, and miscellaneous retail categories, and higher than the average in auto dealers & service stations.

The NCH market area was able to capture 104.63% of local residential spending (\$1.2 billion) as a total. This reveals that the area is a net attractor of consumer spending. Auto dealers and service stations were successful in gaining 209.2% of spending, followed by building materials & garden supplies at 168.3%. Eating & drinking places and food stores gained 91.3% and 85.2% respectively. Apparel and accessories attracted

only 56.7% and general merchandise pulled in 50.62% of total local residential spending in their respective categories.

The market area is successful at attracting local residents' consumer spending and spending by a few people outside of the three mile radius area. This is most significant in auto dealers and service stations and building materials & garden supplies which is most likely attributed to businesses along Colerain Avenue. Approximately half of the money residents are spending on clothing & accessories and general merchandise is being conducted outside the market area.

Business Establishments by Industry

The market area matched the County average in every category except manufacturing which was slightly lower as a percentage of total number of business establishments. The retail establishments were similar to NCH yet they matched the County average in educational services and exceeded both the County and NCH in the percentage of social services establishments.

Retail Establishments by Type

There were more auto dealers and service stations in the market area and fewer home furniture stores as a percentage of all retail establishments.

Employees by Industry

There are more people employed by government and less in the private sector in comparison to the County average, although the deviation is less than was found in NCH. Higher than average percentages of employees were found in the retail, and services categories. Lower than average percentages were found in finance/insurance/real estate and manufacturing fields. The service sub-sector showed fewer employees as a percentage of total employees in the business services and engineering & management fields and a higher percentage in the health services and social services.

Employees by Occupation

A higher percentage of employees were found in the service personnel and lower percentages were in administration and support occupations.

Higher Percentage of Employees by Occupation Sub-Sector

Educators
Technical Support
Health Care
Installation & Repair
Agriculture

Lower Percentage of Employees by Occupation Sub-Sector

Sales & Marketing
Engineers, Scientists & Computer-Professionals
Management Support
Protective Services

Lower Percentage of Employees by Occupation Sub-Sector (continued)

Craft Production

Machine Operators

Assemblers

Summary

North College Hill is in competition with several other shopping districts, the largest being along Colerain Avenue and several smaller ones along Hamilton Avenue and Winton Road.

The community provides affordable single family housing with a high population density. The population is both younger and older than Hamilton County in general. This is a community with higher than average numbers of younger first time homeowners and senior citizens. The aggregate effective buying density is almost twice the County average and the consumer buying power density was more than twice the County average. Local businesses captured 44.5% of this spending by NCH residents. Local businesses were able to attract spending from outside the community in the eating & drinking places category.



Fricker's Restaurant, NCH Attracts Spending in the Eating & Drinking Places Category

The North College Hill market area is composed of residents of relatively the same demographic character. Their age is closer to the Hamilton County average and therefore less likely to be older (widowed) or younger. Overall the market area exhibits many of the same demographic patterns found in NCH but to a lesser extent; most statistics are closer to the County average. Housing is still primarily owner occupied and affordable but approaching the County average. The population is still rather compact and buying power density is greater than the County but not to the extent seen in NCH. Market area businesses were able to capture 104.63% of the \$1.2 billion in consumer spending and therefore able to attract more spending contributed by residents within the 3 mile radius. The area was a net attractor of spending in auto dealers and service stations and in building materials and garden supplies.

Competition Analysis

Winton Road (W. Galbraith Road to Compton Road)

This commercial corridor is centered on Brentwood Plaza and along Winton Road in Springfield Township. The Plaza underwent significant renovation in 2004 and a new Kroger grocery store was established as the anchor. The vacated Kroger building marks the northern boundary. The strip center hosts a collection of smaller national retail chain stores and several restaurants in the outlots. Several dental and medical offices are found in the district. Access is hampered by the lack of a highway ramp from west bound Cross County Highway to north bound Winton Road.



New Kroger Grocery Anchor in Brentwood Plaza



Strip Center Adjacent to Kroger

Colerain Avenue (Between Banning Road to Cross County)

The neighborhood business district along Colerain Avenue is reviewed from Banning Road to Cross County Highway. This district is the least centralized of the corridors. The area is anchored by Bigg's grocery store at the Colerain interchange with Cross County. As with NCH, the area benefits from full access to Cross County. Construction of a Walmart superstore has begun at the Colerain Road exit and is slated for completion in 2006. This district benefits from rather high traffic counts. Northgate Mall and many car dealers to the north serve as regional destinations for shopping and auto sales. The land uses are mismatched and display a lack of planning. A multitude of retail uses are found in this district. There is no cohesive identity to the area other than the road itself. The movement and sheer volume of vehicular activity discourages pedestrian travel.

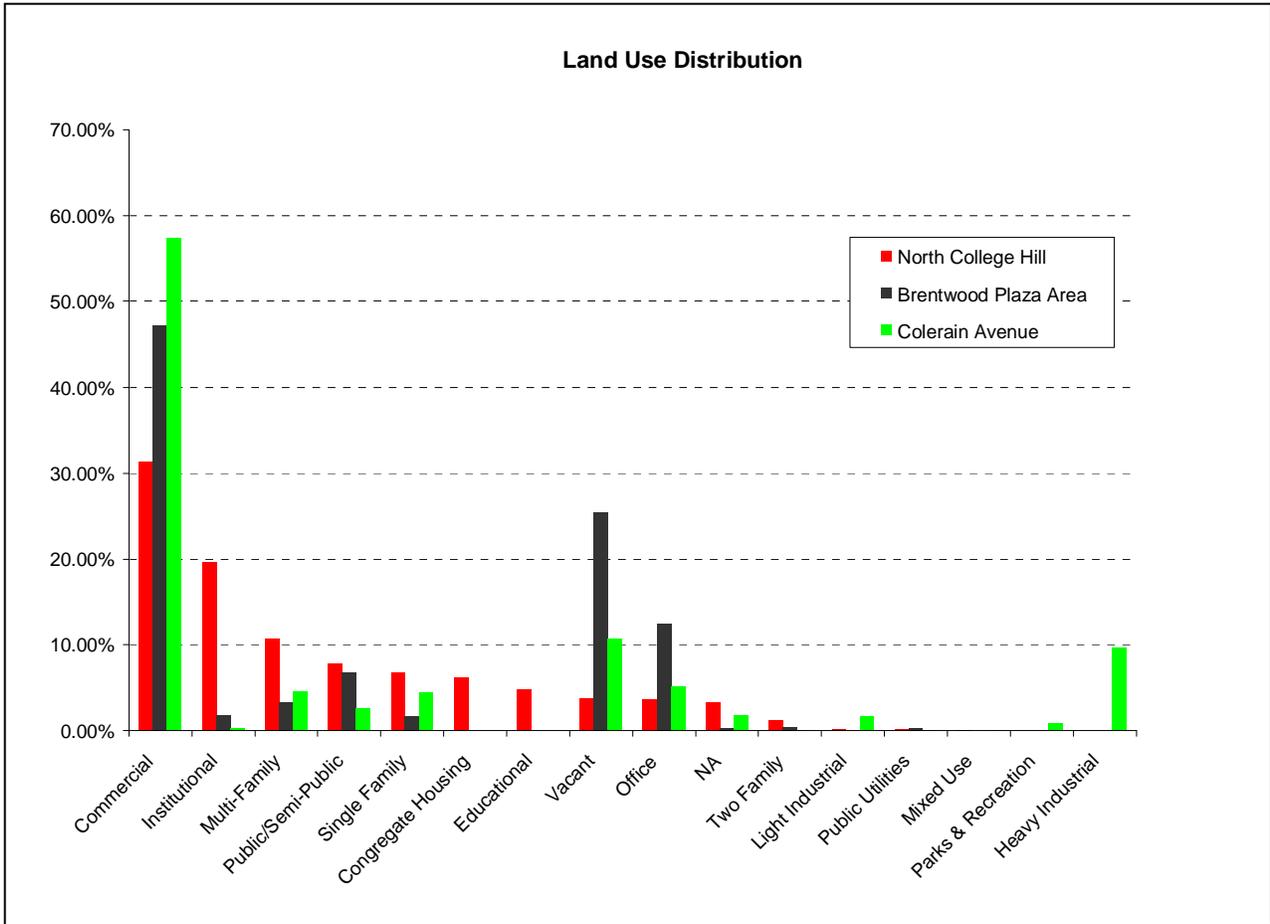


Walmart SuperStore Construction Site



Heavy Traffic Along Colerain Avenue

The table below shows the Hamilton County Auditor's classification of land use for each of the three competing business corridors.



There are several key differences in the composition of land use in the districts.

Commercial land use constitutes the largest percentage for all districts yet North College Hill has the lowest percentage at 31.38% while Brentwood is 47.15% and Colerain is 57.42%.

The North College Hill Business District is unique in that a very large percentage of its land use in the business district is allocated toward institutional uses. Institutional use represents almost 20% of all land in NCH BD but not even 2% in Brentwood and only 0.34% in Colerain.

	North College Hill	Brentwood Plaza Area	Colerain Avenue
Commercial	31.38%	47.15%	57.42%
Institutional	19.65%	1.92%	0.34%
Multi-Family	10.74%	3.36%	4.62%
Public/Semi-Public	7.79%	6.76%	2.64%
Single Family	6.82%	1.71%	4.50%
Congregate Housing	6.23%	-	-
Educational	4.86%	-	-
<i>Subtotal</i>	<i>56.09%</i>	13.74%	12.09%
Vacant	3.79%	25.43%	10.74%
Office	3.69%	12.48%	5.25%
Heavy Industrial	-	-	9.76%

Multi-Family, Public/Semi-Public, Single Family, Congregate Housing, and Educational are summed up in a subtotal in the chart. These combined uses make up 56% of land use in NCH business districts while they only represent only 12-14% in the other corridors. This exemplifies its character as a traditional urban shopping district. The other corridors tend to segregate uses within the community.

Land categorized as “vacant” by the auditor makes up an astounding 25.43% of land in Brentwood, a much lesser 10.74% in Colerain and a very respectable 3.79% in NCH. It should be clearly understood that the auditor classifies vacant land as such for taxing purposes and this does not necessarily mean that any improvements upon the property are vacant nor is it directly related to building vacancy rates. Nevertheless, the amount of land designated as vacant does serve as an indication of the health of the business district and also the opportunity for new and future development.

Office use is more prevalent in the other two corridors. Office use in Brentwood makes up 12.48% of total area, 5.25% of area in Colerain and only 3.69% in NCH.

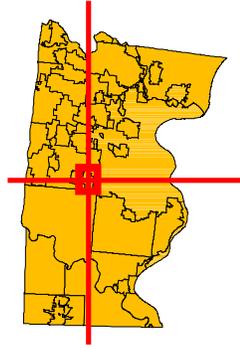
Heavy Industrial use is only represented in the Colerain Avenue business district and constitutes almost 10% of the land.

The NCH business districts occupy 187.7 acres of land. The competing Colerain avenue district is roughly the same size at 194.52 acres. Brentwood is the most compact of the districts and in fact is less than half the size of the other corridors at 87.18 acres.

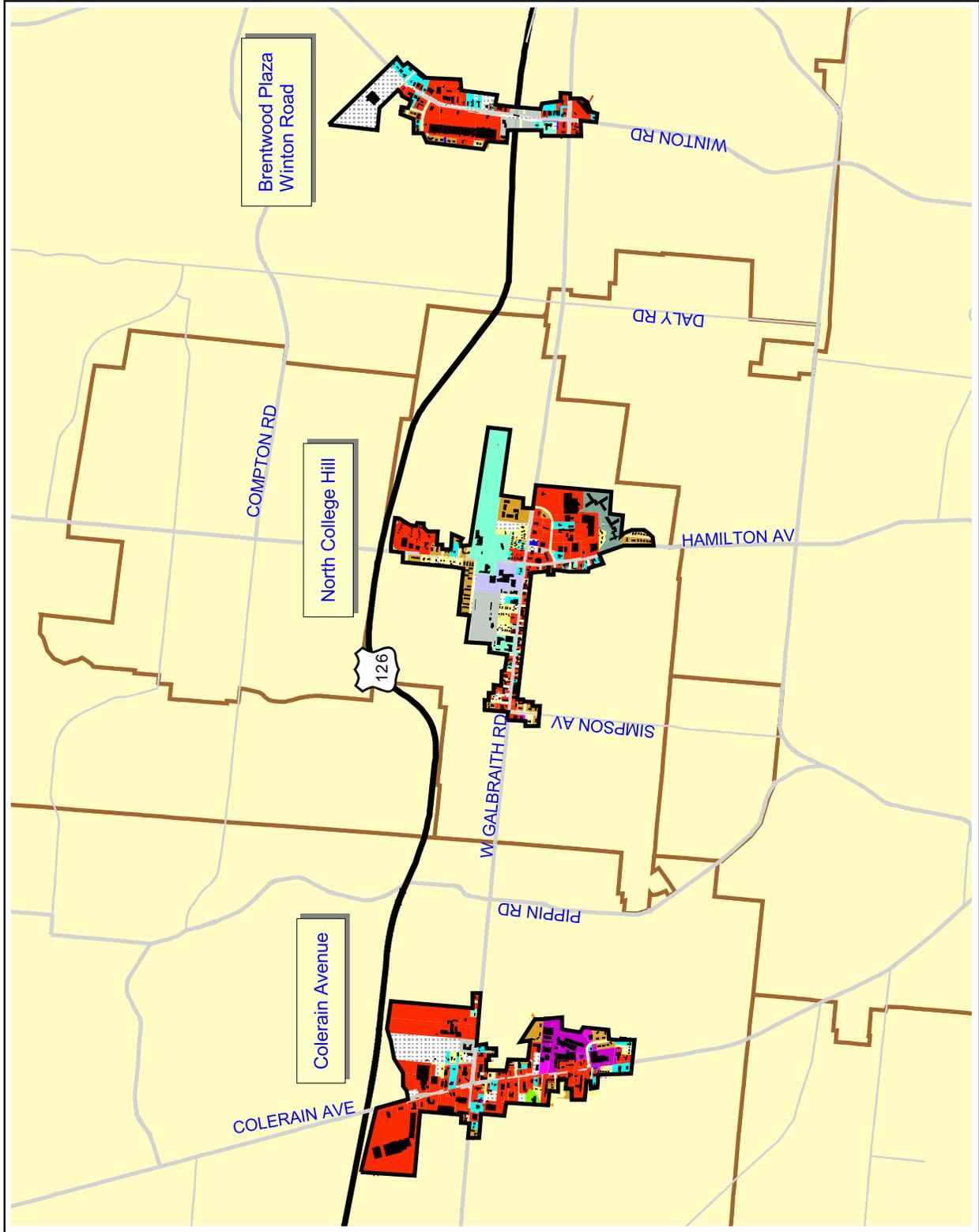
Competing Business Districts North College Hill



- Land Use
- Agriculture
 - Vacant
 - Single Family
 - Two Family
 - Mobile Homes
 - Congregate Housing
 - Multi Family
 - Mixed Use
 - Office
 - Public/Semi Public
 - Commercial
 - Light Industrial
 - Heavy Industrial
 - Educational
 - Institutional
 - N/A
 - Public Utilities
 - Parks & Recreation



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Listing of Retail Categories

Retail Category	Winton	Colerain	North College Hill
Women's apparel	1	2	
Women's shoes			
Men's apparel			
Men's shoes			
Children's apparel			
Children's shoes			
Neighborhood/Family Restaurants	10	5	7
Fast food restaurants/deli	8	7	8
Coffee shop		1	
Grocery store	1	3	1
Meat and Fish market			1
Fruit / Vegetable market			
Ice cream parlor	1		
Retail bakery	1	1	2
Liquor / wine / Tobacco store	2	1	
Bar / tavern	1	3	2
Appliance / electronic store	1	1	1
Automobile sales			
Art, Craft and framing	1	2	1
Auto supply, tires / Oil Services / Parts	5	6	8
Bank / Financial Services	5	9	17
Book store			
Card and gift shop/boutique	1		
Cell phone / pager			1
Computers and accessories			2
convenience and gasoline	4	2	5
Discount merchandise store, furniture	1	5	
Drug store / Vitamin Store	3	2	1
Florist	1		
Health and beauty	1	1	4
Home improvement, lumber, home décor,	2	4	
Jewelry	1		
Laundry / dry cleaning	3		2
Luggage			
Medical supply		1	
Movie theatre			
Music cds			1
Optical vision care	1	1	2
Office supply		2	
Personal services-hair / nails / Tanning	3	8	17
Pet supply	1		1
Photographic & Printing		2	2
Shoe repair			
Sporting goods/bicycle	1	2	3
Toy and hobby	2		
Videos & Video Games rental / sales	2	1	3
Consignment Shop	1		
Men's & Women's Apparel	2		2
Men's Women & Children's Shoes	1		
Hotel / Motel		2	
Medical Office, Dental, Chiropractic		5	5

North College Hill Business Owners Survey

Surveys were sent to 116 North College Hill businesses in the fall of 2005. Thirty-four surveys were completed, equating to a 29.3% response rate. A sample of the business survey can be found in the Appendix.



NCH Bakery

Businesses in operation for 3 years or more were asked to report trends in their sales. 16.7% said that sales had increased over the previous 3 years, 38.9% said sales had decreased, and 44.4% reported sales had stayed about the same.

Easy access, central location, and close to home were the most commonly cited benefits of being located in North College Hill. The greatest disadvantages mentioned in the responses were traffic, crime, and the general image of the community.

Business owners were asked about plans for changes to their physical building or location. 23.5% of respondents indicated that they had a plan to upgrade their place of business or change their business location in the next two years. 50.0% of those said they intended to perform interior upgrades, 37.5% were investigating expansions, 37.5% were considering relocations, and 12.5% were looking into exterior upgrades.

When asked about the market area their business served, 45.5% stated Cincinnati Metropolitan Area, 31.8% stated 3 mile radius, 13.6% stated surrounding neighborhood, and 9.1% answered Regional/National/International.

Business owners anticipate a 5.2% growth in full-time employees from 2006 to 2007 and a 10% growth in full-time employees from 2007-2008. Part-time employment was not expected to experience any significant change.



Street Maintenance & Sidewalks Received Above Average Ratings

Respondents were asked to rank public services and programs offered in North College Hill from 1 “poor” to 5 “excellent” with 3 considered “average.” Business Networking was ranked highest with an average score of 4.1 out of 5. Permit Process, Street Maintenance, Sidewalks were ranked lowest with an average rating of 3.3 or slightly above average. Police/Safety, Fire/EMS, and Business Attitude of Local Government all averaged 3.8.

Restaurants were also ranked using the same scoring system. Food Quality averaged the highest score at 3.6 while Atmosphere received the lowest average score of 2.9 which is considered very slightly under average. Price, Cleanliness, and Parking all averaged between 3.5 and 3.2.

When not eating in North College Hill, business owners said they ate at locations in Colerain Township, West Chester, Finneytown, Brentwood.

Retail and service stores in the corridor were ranked with Price gaining the highest average of 3.6. The lowest score went to Store Selection, and Parking and Customer Service received scores of 3.2 and 3.3 respectively.

Respondents stated that when shopping outside NCH they most frequently visited Northgate/Colerain Avenue, Kenwood, Tri-County, Cincinnati Mills, Brentwood, and Forest Fair.

Several specific concerns were raised by business respondents at the end of the survey. The most common issues were shifting demographics, increasing residential foreclosures, and the perception of a rise in serious crime. Business owners were also concerned with loss of business during road closures, traffic congestion from incorrect timing of lights on West Galbraith Road, lower traffic counts on West Galbraith Road due to Cross County, desire to see storefront exteriors improved, and improvement of streetscape elements on Hamilton Avenue south of West Galbraith.

Developer Surveys

HCDC conducted phone interviews with several local developers to discuss their overall impressions and suggestions for the NCH business district.

General Character

NCH was viewed as a typical west-side Hamilton County community with active citizens who have successfully maintained their city. It was also seen as a historic neighborhood business district in the process of reinventing itself. The area boasts great access and has done an excellent job replacing old infrastructure. The area supports many strong mom & pop businesses and recent development has been encouraged near Cross County Highway. Landscaping is very well done in many areas but strangely lacking south of Galbraith on Hamilton Ave. The City was seen as primarily a retail oriented location that focused on moderate income “savers.”



Hidden Park with Historic Marker Near 5/3rd Bank

Challenges

Leasing rates for office can be as high as \$22 /sqft in the some areas of Cincinnati. NCH is in the \$14.50 /sqft range. Construction costs have risen recently and will continue due to global competition, relatively low lending rates, and hurricane rebuilding efforts.

The aging population is seen as a challenge which many communities throughout the region are experiencing. A solution is to attract younger homeowners and singles with disposable income.



Alleyway Behind Shallow Lots Along W. Galbraith Road

A few key business areas lack a cohesive identity – specifically on Goodman Avenue, the intersection of Hamilton and Galbraith, and the southern end of Hamilton Avenue.

High cost of demolition may slow the redevelopment of older sections. Small and shallow lot sizes may make reuse less attractive.

Many communities want office uses but the market is demanding more office only in a few “hot” areas. Retail lease rates can easily be 50% higher than office rates making them more likely to attract redevelopment interest.



Aging Vacant Building Along Hamilton Avenue

Suggestions

The city could investigate proactively underwriting and assembling property. Make property available at attractive prices. There are concerns that few key landowners may have unrealistic views about the value of property.

There were two main suggestions concerning the Thriftway Site. The first is to subdivide the property, focus on light industrial in the rear and outlot retail along the Galbraith and Goodman frontage. The second approach was outright demolition of the building and market the land as a clean slate, with a fresh/upscale image.

Housing development attracts new retail. Many people are looking for houses in the communities they were raised but they want 2-car garages, 3-4 bedrooms, modern amenities and room plans.



Available Lot Along W. Galbraith Road



Building Renovated by City with Municipal Building in the Distance

Capitalize on the calm residential nature of the area in comparison to other neighborhood shopping areas. NCH offers better access, more convenience, and is generally less frantic than Colerain Avenue.

The community should create an identity, a sense of place and also focus on the visual perception of safety in its business districts. This is done very well in some areas and less so in others. Consumers often will make decisions based on what feels good. Shopping is not an entirely rational process.



The Isaac Mayer Wise Farm Historical Marker

Medical Office Market Research

Healthcare real estate has been experiencing high demand in recent years and is one of the few gems in an otherwise sluggish office market. In recent years vacancy in medical offices has averaged 10% nationally compared to 16.6% in the traditional office market. The healthcare real estate niche has been considered “hot” in many recent medical, business, and real estate publications.

The healthcare industry is estimated to compose only 5% of the commercial real estate market but is expected to grow due to increases in national total health care spending. The Center for Medicare & Medicaid Services estimates medical spending to increase two-fold from \$1.54 billion in 2002, to \$3.1 billion by 2012.

Medical offices are perceived as having a “tremendous long-term potential because of the growing demand for medical space” sighted by an article in the National Real Estate Investor entitled Medical Office Buildings: Remedy for an Ailing Market. The two primary factors driving growth in the industry are the aging of the baby boomers and expanding commercial and residential development.



Example of a Medical/Flex Space Office
Development

Design Considerations & Increased Cost

Real estate investors are increasingly interested in renting to doctors, given the lower vacancy rate and strength of the health-care sector during a slow economy yet special design considerations, which often result in increased costs, are often encountered.

Medical offices require specific design, construction and materials, and property management above and beyond that of a typical office building. Buildings intended for medical use are built upon the same shell construction as office developments but interior layouts, HVAC systems, radiation shields, sound control, and the number of plumbing and restroom facilities are just a few of the unique design requirements which raise the cost and complexity of buildings used by the medical field. The National Real Estate

Investor reported that the typical build-out price on medical space runs at approximately \$80-\$100 /sqft compared to \$25 to \$35 /sqft in general office space.

In addition, general maintenance and upkeep issues are more prevalent in the health care industry due to the high volume of patient traffic and concern for environmental sanitization.

Location Decisions

Physicians also are applying retail principles to their office selections. They generally seek space with good accessibility, adequate parking and high visibility. Research on recent trends reveal several issues which help determine the location of new medical offices.

1. Medical facilities locate near their customer’s homes. “Commercial follows residential. Groups that don’t need to be near a hospital are trying to make it more convenient for their patients to get to them,” said Tyler Reiber a medical office developer working in Tampa Bay region.

2. General physicians desire residential areas close to their customers along higher traffic corridors. New medical facilities tend to compete for the same prime locations on a busy thoroughfare. Medical facility planners must have the foresight to purchase land in high demand areas before it gets too expensive. Steve Brown, a realtor specializing in health-care real estate stated that doctors, under pressure from lower reimbursements, have tried to save money by consolidating and sharing office expenses. That includes seeking the help of real-estate professionals and locating away from hospital campuses, if possible.

3. Medical uses locate near high traffic retail districts. “Physicians like to be close to retail,” reported David Scher, a retail developer quoted in the Tampa Bay Business Journal. He continued saying “there’s synergy there because that’s where people go. You see more and more medical centers close to retail centers.”

4. Medical specialists prefer to locate near existing hospital facilities. “Physicians, particularly specialists want to be near hospitals for convenience” said B.J. Miller a health consultant interviewed in a Minneapolis/St. Paul Business Journal article.



Medical Buildings Tend to Locate near Retail

5. Medical offices can be incorporated into a comprehensive land use strategy adopted by a community with a need to effectively buffer commercial and residential land uses. They have the possibility of significantly improving the physical design and lessen the impact of retail development encroachment on residential areas. Medical offices require

smaller parking lots with more opportunities for landscaping and smaller building footprints. In some instances medical facilities intentionally fit directly into the residential fabric and convey a sense of comfort, peace, on a very human scale which provides a pleasing transition from larger retail uses to single and multi-family residential.

Specialization in the Health Care Industry

A recent trend in the medical arts is the evolution of services to address the specific needs of a specific group or population. Customization of prevention, treatment and rehabilitation services which cater to the needs of the individual are on the rise. In addition, the ever-increasing costs of healthcare and desire to minimize hospital stays have created many opportunities for more cost-effective outpatient care and other alternatives.

Often individual practitioners seek out locations in underserved areas with few doctors or situations where they will not be in direct competition with established group practices. When ideal locations are unavailable doctors are encouraged to attract patients by offering evening or weekend office hours or a practice that fits a unique niche. Some establishments offer programs which match the specific health concerns of the local population such as comprehensive programs in weight management, special prenatal care for at-risk low income residents, nutritional medicine, vitamin counseling, cellulite reduction, smoking cessation and even “drive through” flu shots where patients can receive injections without leaving their cars.

Local Hospitals

The following information was obtained from the two local hospital webpages.

Mercy Franciscan Hospital Mt Airy

The Mercy Franciscan Hospital Mt Airy Campus is located on 2446 Kipling Avenue just South-west of North College Hill. The InterCommunity Cancer Center is located at 2452 Kipling Avenue. Founded in 1971, Mercy Hospital Mt. Airy has been serving the community at its expansive campus at Kipling Avenue and Banning Road in Mt. Airy. A full-service hospital, Mercy Mt. Airy offers orthopedic, cardiac and maternity care and an array of other healthcare services.

Hospital Statistics:

445 affiliated physicians
1,000 employees
1,166 births in 2004
269 licensed acute care beds
10,344 patient admissions in 2004
49,053 emergency department visits in 2004
(includes Harrison Medi-Center)

More information can be found on the Mercy Health Partner's webpage.

<http://www.ehealthconnection.com/>



The Drake Center

The Drake Center is located at 151 W. Galbraith Road approximately 3 to 4 miles east of the city. The center specializes in rehabilitation services and serves all residents of Hamilton County regardless of their ability to pay.

Drake Center's 42-acre campus just west of I-75 in Cincinnati is unlike any other health care facility in the region. Drake's efficient and attractive health care center enables us to provide leading-edge, high-quality care far into the 21st century.

But more than just architecture and acreage, Drake Center is fundamentally about their patients, staff, specialized programs, and state-of-the-art equipment and technologies. The organization's success stands as a testament to the hard work and achievements of the Drake Center team, who focus on their patients' care and recovery day after day.

Drake Center houses a number of unique facilities within the campus that support and enhance these efforts, including:

- Health Care Resource Center
- Warm-Water Aquatic Center
- Support and Wellness Programs
- Therapeutic Courtyard and Patient & Family Pavilion
- Transitional Living Suites
- Child Care Facility

Visit the Drake Center webpage for additional information.

<http://www.drakecenter.com>



Existing Health Care Related Businesses in North College Hill

Clovernook Center for the Blind and Visually Impaired, Procter Center – Low Vision Center
7000 Hamilton Avenue

Clovernook HealthCare Pavilion (Micah Clovernook LLC)
7025 Clovernook Avenue

GMR Exceptional Care, Inc. (Assisted Living Facility)
6721 Hamilton Avenue

Lakeridge Villa Nursing Home (Cedar Medical Group, Inc.)
7220 Pippin Road
Community Ambulance Service
6609 Hamilton Avenue

Pregnancy Care of Cincinnati
1608 Sundale Avenue

Hamilton Chiropractic Therapy Center
1592 Goodman Avenue

Tri-State Centers for Sight
1577 Goodman Avenue

Dentist- Vilardo, Nagy, Rogers
1612 Galbraith Road

Jarnot Optical
1833 W. Galbraith Road

Charles Hafele
North College Hill Chiropractic Center
6527 Hamilton Avenue

Shirley Stephens Counseling
1590 W. Galbraith Road

Right to Life
1802 W. Galbraith Road

Jerome Gabis Psychologist
7105 Hamilton Avenue

Family Essence
6721 Hamilton Avenue

Regency Village Nursing Home
6550 Hamilton Avenue

Life Issues Institute
1721 W. Galbraith Avenue

GS Ruedisuell, MD.
1833 W. Galbraith Road

Thomas Sullivan, DC.
7106 Pippin Road

Affordable Counseling Service
1590 W. Galbraith Road

Lenscrafters
1591 Goodman Avenue

Medical Office Recommendations

Opportunities

North College Hill has many positive attributes which would aid in the attraction of medical office development.

New commercial development along Hamilton Avenue from Goodman to the Cross County Highway, coupled with affordable real estate values and several large multi-family parcels could encourage medical office development. The area also boasts high traffic, high visibility, and convenient access which were identified as being highly attractive.

The community has two very specific demographic groups which could be found to be underserved by the current medical services. Facilities catering to young families and aging senior citizens could well find success in the area.

Two large hospitals are within a few miles of North College Hill. The Drake Center is directly connected to the area via Ronald Reagan Cross County Highway. Physicians and patients currently traveling to Mercy Franciscan Hospital are likely to drive on Hamilton or Galbraith roads to access the hospital.

There are a number of existing medical oriented businesses in the area, including several assisted-living facilities. Direct interviews with these business leaders and their inclusion in the formal business association would yield more insightful and specific suggestions as to the type of medical users which would be attracted to NCH.

Challenges

The most apparent challenge to the community is the lack of an increase in population. Furthermore, there are no plans for significant new residential development in the upcoming future.

Securing single family residences favorable for medical office use, and assembling parcels of land in key locations of suitable size will obviously be the largest challenge presented to medical office developers. This will also trigger a debate for local officials as land use and zoning requests question the best and highest use for any given building and property as they fit into the community as a whole.

Thoughtful consideration to adequately buffer and protect residential areas from commercial uses and higher traffic volumes will be a major concern for planning and zoning officials should medical offices seek to locate in the area.

Recommendations

The recommendations presented below are based on HCDC's analysis of existing conditions, business surveys, developer interviews, demographic research, and current development trends. The three distinct business districts each possess individual characteristics, strengths, challenges, and opportunities. Given that communities have limited resources it is suggested that highest priority be given to development efforts which demonstrate the highest opportunity to improve the overall health of the city's business environment. Priority should also be given to development which will be supported in the current economic market. Each area is displayed on the recommendations map and discussed in greater detail.

High Development Potential

- Goodman Business District - (Thriftway, Blockbuster Video, Bank One)
Development Scenario A
- Hamilton & Galbraith Intersection
Development Scenario B

High/Moderate Development Potential

- Hamilton Avenue SW
Development Scenario C
- Hamilton Avenue N
Development Scenario D

Moderate Development Potential

- W. Galbraith Business District
- Goodman Business District (SW Portion)
Development Scenario E

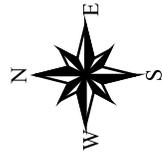
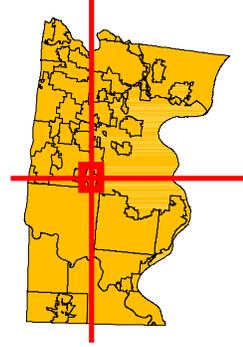
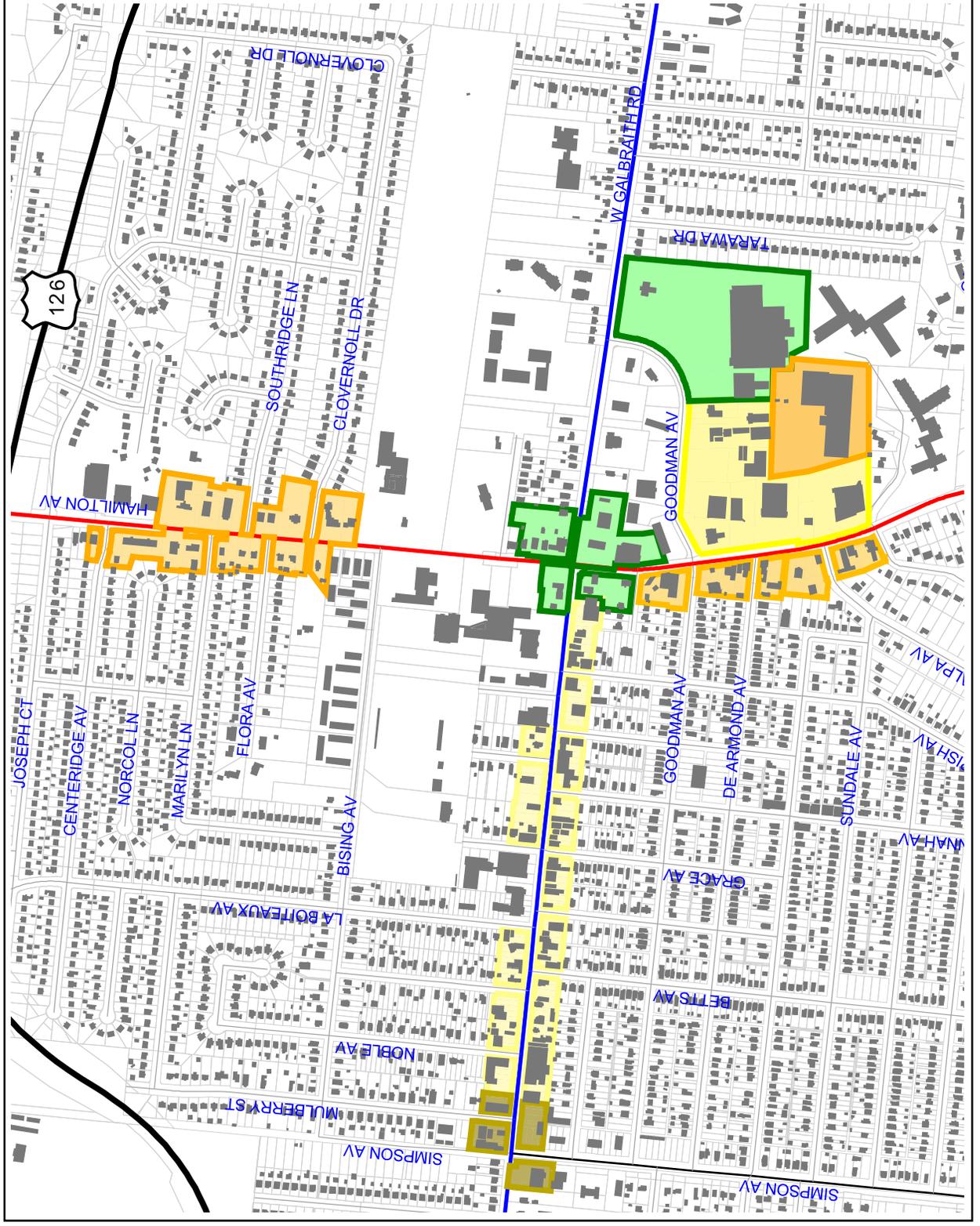
Community Gateway

- West Entrance - (Simpson Road & W. Galbraith Road)
Development Scenario F

Recommendations - Development Potential North College Hill



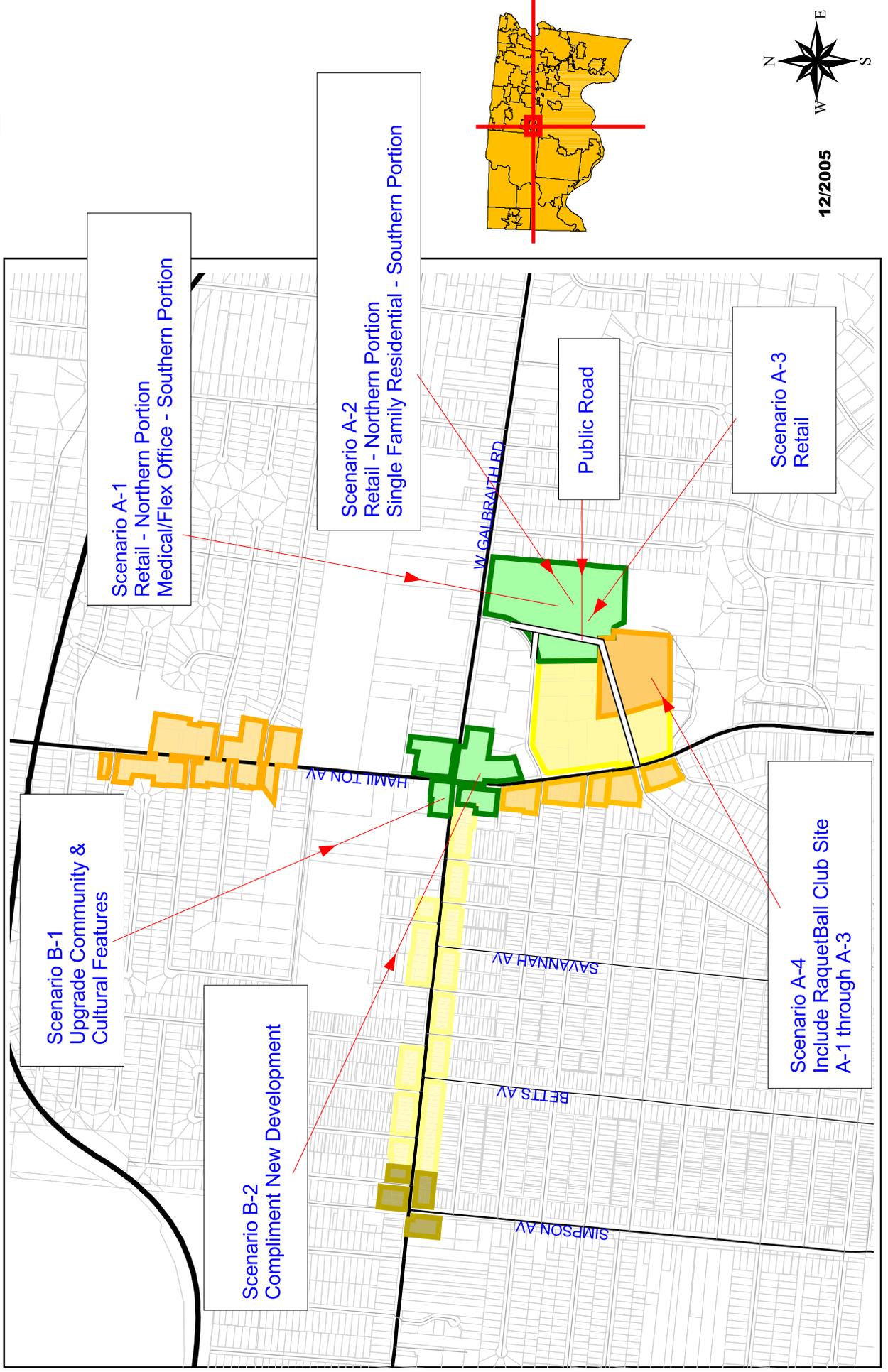
- Development Potential
- High Potential
 - High/Moderate Potential
 - Moderate Potential



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Recommendations - Development Scenarios (A & B) North College Hill



Scenario A-1
Retail - Northern Portion
Medical/Flex Office - Southern Portion

Scenario A-2
Retail - Northern Portion
Single Family Residential - Southern Portion

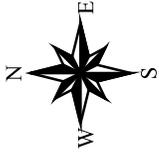
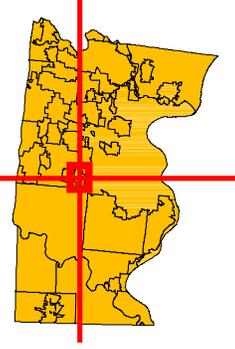
Public Road

Scenario A-3
Retail

Scenario B-1
Upgrade Community &
Cultural Features

Scenario B-2
Compliment New Development

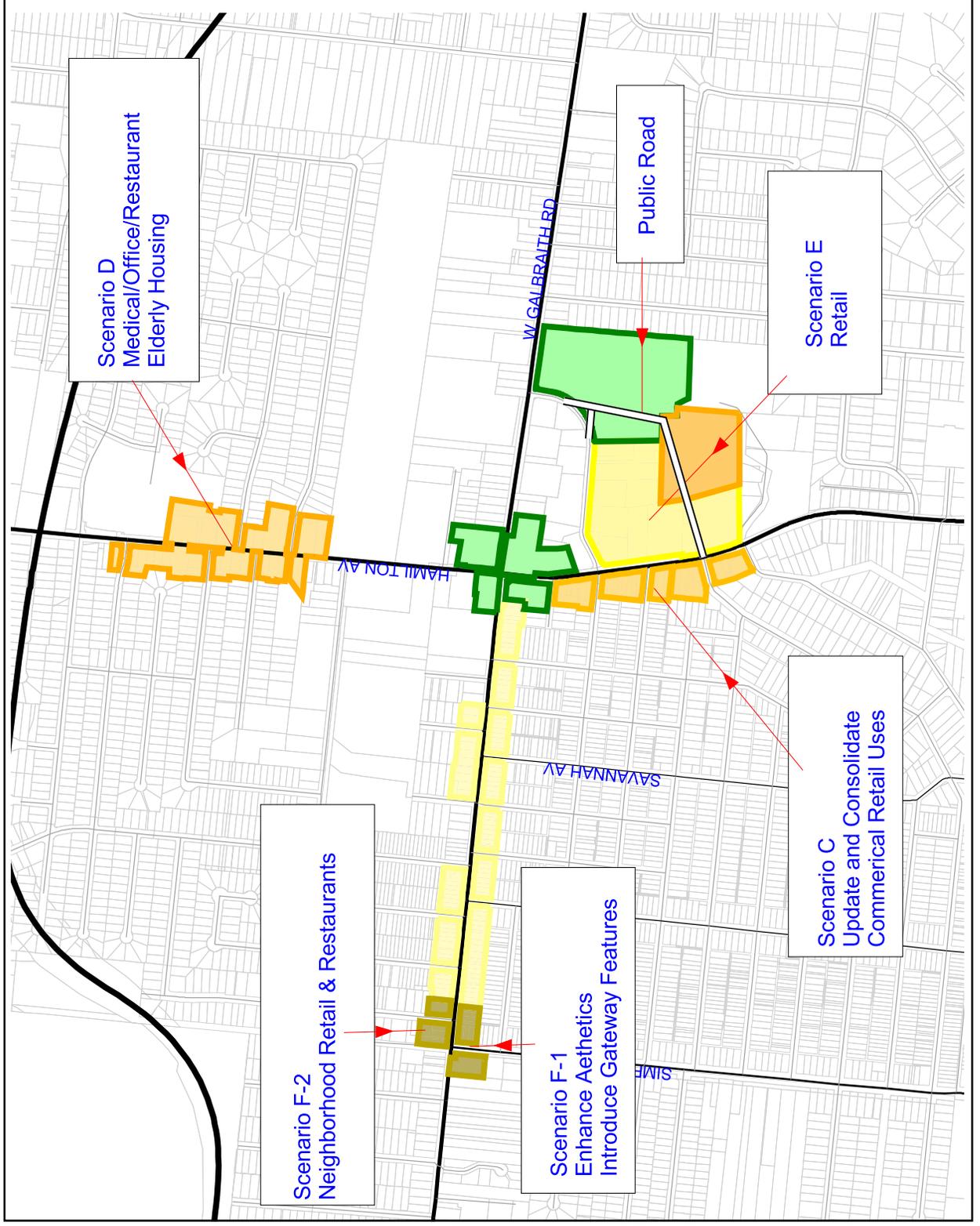
Scenario A-4
Include RaquetBall Club Site
A-1 through A-3



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Recommendations - Development Scenerios (C,D,E,F) North College Hill



Scenario D
Medical/Office/Restaurant
Elderly Housing

Scenario F-2
Neighborhood Retail & Restaurants

Scenario F-1
Enhance Aesthetics
Introduce Gateway Features

Scenario C
Update and Consolidate
Commerical Retail Uses

Public Road

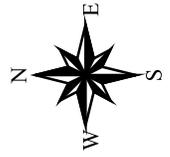
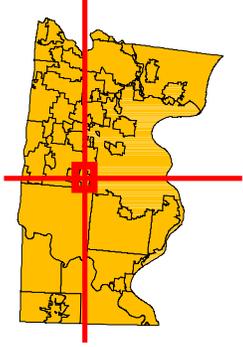
Scenario E
Retail

W GALBRAITH RD

HAMILTON AV

SAVANNAH AV

SIM



12/2005



Goodman Business District - (Thriftway, Big Lots, Blockbuster Video, Bank One)

Scenario A-1

Developers have indicated that one possible approach to revitalize the vacated Thriftway/Big Lots location is redesign of the site for a mixture of flexible uses. Specifically there is an opportunity to design the area to incorporate smaller retail spaces, flex office, and light manufacturing buildings. The lot could be divided into smaller lots. Lots with high visibility along Hamilton Avenue are advised to focus on retail with flex office spaces further to the south and light manufacturing to the rear of the site. Demolition of the existing building may be needed considering the current site layout and the large building footprint.



Thriftway Parking Lot and Bank One



Example of Flex Office



Example of Light Manufacturing

Scenario A-2

There may also be an opportunity to develop residential housing on this site. Current residential zoning in North College Hill allows 3.63 units to be constructed per acre in R1, and 4.83 units/acre in R2 areas. It is estimated that anywhere from 35 to 50 single family houses may be constructed on this 11.63 acre site. The housing would need to target an appropriate price point. High density can be achieved by careful design but would also include elements such as individual parking spots, 2-3 bedrooms, and 2-3 bathrooms. Elderly friendly design concepts could also be employed such as zero steps, ramps for elevation shifts, larger restrooms, solariums, and low maintenance materials.

Two recent housing projects in Greater Cincinnati provide examples of low maintenance, high quality, and high density residential development.

Mariemont Landing, in Columbia Township, is a clustered housing community with a total of 74 housing units. Approximately 40 units are single family detached housing and another 34 units of condos built on roughly 11 acres. A home owners association has established architectural guidelines and maintains the streets and landscaping. As of January 2006 the houses were priced in the \$250,000-300,000 range. The price is partially based upon a highly desired school district, proximity to prestigious Mariemont, and lack of new housing or available property in the general area. Additional information can be found at <http://www.mlhoa.net>



Mariemont Landing Condos



Mariemont Landing Town Houses

Potterhill's Homes in the Mills of Carthage in the City of Cincinnati is another recent development which features manufactured and modular housing. This was a former industrial site remediated for single family detached residential. Buildings vary greatly in size, style, internal layout, and pricing. Homes also have porches, 2-car garages accessed by a shared alleyway in the rear, and a 15-year tax abatement on real property taxes. Prices for these houses range from \$170,000 to \$210,000 as of the writing of this report. Additional information can be found at <http://www.potterhillhomes.com>



2.5 Story House in Carthage Mills



A Variety of Higher Density Housing in Carthage Mills

Scenario A-3

A possible redevelopment scenario is to continue to use the entire site for retail use. This location could attract one or two big box retailers or a collection of shops in a contemporary L-shaped strip mall structure. Visibility will be a key concern, as was discussed in the existing conditions business corridor section of this report. The land fronting W. Galbraith Road has decent access and visibility. The remainder of the site would need to heighten its level of visibility for retail to be successful. The most common solution to this problem in other areas has been to construct tall signage as is found along Interstates. Given the general character of NCH, it is assumed that such a scheme would not be met with enthusiasm in this location. Therefore this scenario is not deemed economically feasible or desirable.

Scenario A-4

This final scenario considers the inclusion of the 5.62 acre site currently occupied by the Colonial Ridge Racquetball Club. This high ceiling recreational building is tucked between the Thriftway and a former IGA currently housing the beauty supply store. Suggestions to improve access to the Racquetball Club are given in Scenario C. It could be possible to combine this area with Thriftway, Bank One, and Blockbuster to create a 17.25 acre site for redevelopment.

Recent visits to the Racquetball Club on a weekend have revealed a full parking lot. This would indicate that membership at the Club is reasonably high. Therefore it is assumed that expansion or improvement of the current facility as discussed in Scenario C is a very feasible option. Discussion with the operators to learn their specific desires is advised.

Public Road

A new public roadway could be constructed linking Hamilton Avenue at Sundale Avenue to W. Gabraith Road at Goodman Avenue. This would provide formal access for current businesses and increase the development opportunities for the Thriftway site.

PUD Zoning

A planned unit development (PUD) is an overlay zoning district that permits land development on several parcels to be planned as single units. This can include residential, commercial, or industrial land development that provides more planning flexibility than traditional zoning. The planned unit is regulated as one unit instead of each lot being regulated separately.

Hamilton & Galbraith Intersection

Scenario B-1

This intersection represents the center of the City of North College Hill. The perception this corner encourages will extend throughout the entire area. It is suggested that the area maintain the feeling of a small village. Resistance should be given towards typical suburban parking and building orientations. The existing Kemper Professional Building can be used as an example of scale and style.

Given that a Walgreen's will likely be sited on this intersection, it is useful to envision how the store could look. Recently a Walgreen's was constructed in the City of Norwood at two main crossroads of the community. Special attention was made to layout rather than applying the default suburban pattern. The use of zero lotlines, decorative signage, landscaping, awnings, and parking orientation can be used to display the prestige of the location and reinforce the overall community character.



Example of Walgreens Built on a Prominent Community Corner



Notice the zero lot lines, decorative signage, landscaping, awnings, and building located on the side of the lot

Scenario B-2



Sidewalks and business front doors with no roadway buffering

Incorporate street furniture and landscaping to provide better pedestrian safety. High volumes of pedestrian traffic, especially high school students are found at this intersection in the morning and afternoons. Efforts should be made to guide and protect foot traffic, while simultaneously alerting vehicular traffic of potential hazards.

Hamilton Avenue SW - (between Clover Lane and Meis Avenue)

Scenario C

A mixture of buildings with inconsistent road frontage, parking, and access are located along Hamilton Avenue between Clover Lane and Meis Avenue. Several value-oriented businesses built into the front of residential houses exhibit little architectural or aesthetic appeal to a vast majority of modern consumers.



Clean Getaway Building



Businesses Fronting the Street on Hamilton Avenue

The Clean Getaway building design and site layout is inconsistent with the surrounding uses. The building sits in the middle of a fully paved lot. The former Rent-A-Center building displays a rather interesting adaptive reuse of an old theater. Unfortunately the building's raucous signage and white paint attracts quite a bit of attention in a very visible location. Ideally this business would be relocated to a less prominent location in the district. Reuse of these sites should be investigated.

A Façade improvement program and community reinvestment area (CRA) could be considered for the stretch of Hamilton Avenue between Meis Avenue and Goodman Avenue. Façade improvement programs can be structured in many different ways involving components such as loans, grants, tax abatements and other financial tools. Zoning requirements for this area should also encourage a consistent design of facades, frontage, access and landscaping.



A Façade Program and Community Reinvestment Area (CRA) are suggested for a portion of Hamilton Avenue

The abandoned Clark Station may require environmental investigation. In addition, acquisition of the single-family residence behind the site may be necessary to assure adequate lot size for any future commercial use.



Vacant Clark Gas Station

Hamilton Avenue North of Galbraith

Scenario D

The area surrounding the new Kroger is likely to experience development pressure. This could include conversion of the residential areas to commercial use such as office and retail. Efforts should be made to retain the less-intensive residential character of this business district. Residential areas should be buffered, where possible, from Hamilton Avenue and commercial uses through the use of land use planning, and zoning requirements to provide adequate transition between uses.



Multi-Family Near Kroger

Businesses complimentary to Kroger and the other surrounding business will be met with the greatest success. Kroger serves not only as a grocery but also as a pharmacy, bakery, photo shop, deli, flower shop, and gas station. The Perkins family restaurant is also in the vicinity. Review of other Kroger grocery locations in Greater Cincinnati reveals that businesses that tend to locate near the store include videostores, bookstores, greeting card stores, coffeeshops, sandwich shops, family hair salons, pets stores, and breakfast oriented restaurants.

Goodman Business District SW

Scenario E

There are a variety of businesses located near Colonial Racquet Club which are primarily accessed via a barely discernable road passing between Valvoline and Beauty Supply and Super Center. A more formalized access road extending east from the intersection of Sundale Avenue and Hamilton Avenue should be considered.



Access to Colonial Racket Club and several other businesses in the area could be better defined

Currently the buildings in this area are designed in a pattern found in a more suburban area where it is common to find wider streets of 6-8 lanes, a 40 mph speed limit, buildings are set back quite a significant distance from the roadway yet can easily be seen from a far distance. Route 4 in Fairfield is such an example.

A suggestion would be to redesign the building layouts and construct a public road connecting Goodman Avenue and Hamilton Avenue at Sundale. Buildings could be clustered together as a cohesive design to better utilize the existing space, provide safer and more attractive access, and draw more attention from the street. There may also be opportunities for expansion of the existing Racquet Club.



Parking Lots along Hamilton Avenue

In general, clearer differentiation between parking lots, streets, sidewalks, and landscaping buffer are also advised to improve the area and present a more unified street frontage and aid in vehicular flow.

The City could finance infrastructure improvements in this area through the use of tax increment financing (TIF). A TIF works by locking in the taxable worth of real property at the value it holds at the time the authorizing legislation was approved. Payments derived from the increased assessed value of any improvement to real property beyond that amount are directed towards a separate fund to finance the construction of public infrastructure defined within the TIF legislation. Local governments may authorize TIFs to fund a number of infrastructure needs including public roads, and highways, water and sewer lines, remediation, land acquisition, demolition, the provision of gas, electric and communications service facilities, and the enhancement of public waterways. Additional information on this tool can be found in the appendix of this report.

West Entrance - (Simpson Road & W. Galbraith Road)

Scenario F-1

Leach Automotive at the corner of Simpson Road marks the western entrance into the North College business district and is in close proximity to Clovernook Country Club. This is a very important location as it serves as a gateway into the business district. Often a business district is identified by the uses on its corner lots and entryways. Businesses which serve as holding depots for cars are often found tucked between or behind other more inviting and compatible uses. At the very least these businesses should be encouraged to screen their car lots or showcase the pride of their fleets along the street frontage. Use of landscaping, low masonry walls, and other gateway features would dramatically improve the visual quality of the entire area.



Western Entrance to the W. Galbraith Business District



Leach Automotive at Simpson Road and W. Galbraith



Car Wash on North Side of W. Galbraith

Scenario F-2

A second scenario for this area could be the encouragement of neighborhood oriented retail and restaurants as is found along a majority of the rest of this business corridor. An example of an auto-oriented business that was converted into a restaurant can be found in Pleasant Ridge. Donovan's Auto and Tire, on Montgomery Road, was renovated into an Irish Pub called the Dubliner.

A Community Reinvestment Area (CRA) could also be established on W. Galbraith Road, West of Hamilton Avenue. CRAs are permitted in the Ohio Revised Code and allow communities to encourage private commercial and residential investment in buildings. All land uses including retail, residential and commercial are eligible for property tax exemptions under this program. Tax exemptions allow for companies to reduce their costs over the short term while they establish their business. For example, a new retail building could be built where the property taxes are reduced by up to 75%, which could save the owner and the tenants significant amounts of money for several years. After the tax exemption expires, property tax revenues revert to their normal levels. This program creates a long-term, tax-base increase with a short-term tax incentive.

General Suggestions

HCDC's analysis of population characteristics suggests that businesses may find success catering to younger populations and elderly. NCH has a number of successful eating and drinking establishments. Affordable family style restaurants such as Perkin's, Frisch's, Fricker's, and Kathy's Place are already found in the business district. It may be possible to attract several moderately priced sit-down restaurants such as Bob Evan's and La Rosa's.

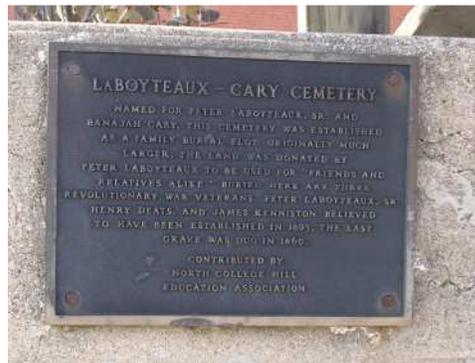
Foster the existence of a commercial village environment on W. Galbraith Road. Concentrate on a population that enjoys the area's charming, convenient, and friendly nature. Hamilton Avenue will most likely develop in a more car-oriented pattern.

Showcase the identity of NCH. Introduce markers, signage, banners, and other streetscape elements throughout the business districts which convey the unique character of North College Hill. Good locations for such displays are the gateways to business districts, major intersections, and the interstate exits.

Increase the visibility of Pies Park and Laboiteaux-Cary Cemetery. The park is currently a hidden gem in the NE corner of NCH. While there are quite a few institutional uses in this area most of them do not appear to be open to the public. Park land clearly visible to the passing traffic create a sense of community and uniqueness to the area. The cemetery, surrounded by black wrought-iron fencing, occupies one of the most prominent locations, yet is unmarked.



Laboiteaux-Cary Cemetery at Hamilton Avenue & W. Galbraith Road Intersection



A small sign, only seen by pedestrians is the only formal marking for the cemetery

As development and improvements are made on large projects throughout the City, close attention should be given to the visibility of these sites and cohesion with surrounding uses. Good layout and comprehensive design will stand the test of time and not require significant upgrades in the near future. A few key projects in the right locations will change the nature of the entire corridor as a whole.

Perception of safety is a major concern in any community. While crime statistics may state that the area is safe, use of lighting, police patrols, building orientation and access all contribute to the feeling of safety. Clean, well kept business areas go a long way toward luring new customers. Storefront windows of vacant buildings could be covered with seasonal images which contribute to the character of NCH.

Focus on shopping demands of the local neighborhood. Identify the specific needs of the people in the immediate area and raise awareness of existing businesses, and community events. A spirit shop for local athletics both at the professional and high school level could potentially be located near the schools.

Market the existing business establishments. The business association should consider shared marketing efforts such as brochures, coupons, mailers. Another idea is to make a one page community newsletter document with a section for all the participating merchants and mail it to all residents of NCH. Merchants could purchase advertising space in the city's newsletter.

Create a community bulletin board outside the municipal building or on another prominent location or corner which experiences significant foot traffic. A map of the business district, current community events, the mayor's newsletter, and other related announcements are items that can be included on the bulletin board.

Conduct regular business retention efforts. The city currently has a quite impressive collection of locally owned shops and services. City officials could take up business retention efforts by meeting with businesses one-on-one to discuss current issues and future plans. A schedule to meet with each and every business owner in the city at least once every 5 years would be suggested. Another approach is to conduct retention meetings with the largest employers and work with the Business Association to identify common issues with other businesses.



Focus on the Retention and Expansion of Existing Businesses in NCH

Appendix

NORTH COLLEGE HILL BUSINESS SURVEY

The following survey was prepared by the Hamilton County Economic Development Office, in coordination with North College Hill, to get your input on a study of the Business District. We recognize your business as a valuable asset to the community, and would like to play a role in your continued success.

YOUR INDIVIDUAL COMMENTS ARE IMPORTANT AND WILL NOT BE MADE PUBLIC.

Background

Company: _____

Address: _____

Telephone: _____

Contact Person: _____

Type of Business/Product/Service: _____

Place of Business

How long has your business been operating at this location?

Do you own or lease your place of operation? ____ Own ____ Lease

If you lease, when does your lease expire? (mo./yr.) _____

Are you planning any of the following within the next 2 years? (Mark any that apply)

_____ Expansion _____ Exterior upgrades

_____ Relocation _____ Interior upgrades

If your business has been in operation for 3 or more years, please check the statement that is true:

_____ Business has experienced **increasing** sales during the last 3 years;

_____ Business has experienced **decreasing** sales during the last 3 years;

_____ Business sales have **stayed about the same** during the last 3 years

What do you consider as the greatest benefit of being located in North College Hill?

What do you consider the greatest disadvantage of being located in North College Hill?

Which category best describes the market area that you serve (check one)?

- Surrounding neighborhood
 Within 3 miles
 Cincinnati Metropolitan Area
 Regional/National/International market

Employees

Number of Employees: Full-time _____ Part-time _____

Please estimate future employment:

	Full-time	Part-time
2006	_____	_____
2007	_____	_____
2008	_____	_____

Please estimate where your employees live (by percentage):

- In North College Hill
 Elsewhere in Hamilton County
 Other (Butler Co., Warren County, Kentucky, Indiana, etc.)
100% Total

Business Services

What is the most important service that could be provided to your business to support economic growth and development? (*Check any that apply*)

- Financing options
 Streetscaping
 Tax incentives
 Improved access
 Other: _____
- Infrastructure improvements
 Employment training
 Local government support

Please rate each of the following services or programs in North College Hill:

	<i>Poor</i>		<i>Average</i>		<i>Excellent</i>
<i>Permit Process</i>	1	2	3	4	5
<i>Police/Safety</i>	1	2	3	4	5
<i>Fire/EMS</i>	1	2	3	4	5
<i>Street Maintenance</i>	1	2	3	4	5

<i>Sidewalks</i>	1	2	3	4	5
<i>Business Networking</i>	1	2	3	4	5
<i>Business Attitude of Local Government</i>	1	2	3	4	5

Doing Business in North College Hill

We would like to know what you think about doing business in the North College Hill.

Restaurants in the corridor

	<u>Poor</u>		<u>Average</u>		<u>Excellent</u>
Food quality	1	2	3	4	5
Atmosphere	1	2	3	4	5
Price	1	2	3	4	5
Cleanliness	1	2	3	4	5
Parking	1	2	3	4	5

If you do not use the North College Hill Business District restaurants, where do you eat?

Retail/Service stores in the corridor

	<u>Poor</u>		<u>Average</u>		<u>Excellent</u>
Store Selection	1	2	3	4	5
Customer Service	1	2	3	4	5
Parking	1	2	3	4	5
Price	1	2	3	4	5

If you do not shop in the North College Hill Business District, where do you shop?

Conclusion

Please list any other comments, suggestions or concerns (use additional pages if necessary):

THANK YOU FOR YOUR RESPONSES!

-Please return this form to Catherine Fitzgerald of the Hamilton County Economic Development Office at 631-4887(fax) or mail to 1776 Mentor Avenue, Cincinnati, OH 45212. Please call 631-8292 with any questions.

2005 Claritas Intellisat Demographics

	City of North College Hill		3 Mile Blockgroup		Hamilton County	
2005 Population	9,466		110,872		812,803	
2005 Population Density (per Sq. Mile)	5,156		3,183		1,995	
2005 Households	4,010		45,327		337,837	
2005 Household Density (per Sq. Mile)	2,184		1,301		829	
2005 Housing Units	4,298		47,659		363,641	
2005 Housing Unit Density (per Sq. Mile)	2,341		1,368		893	
2005 Median Age	37.60		37.90		38.20	
Land Area in Square Miles	1.84		34.83		407.37	
2005 Median Value, Owner-Occupied Housing Units	\$98,016		\$108,240		\$122,736	
2005 Average Household Size	2.28		2.41		2.35	
2005 Population Age 15+ Never Married	2,272	30.17%	24,900	28.82%	199,213	30.79%
2005 Population Age 15+ Married, Spouse Present	3,390	45.01%	41,678	48.24%	306,973	47.44%
2005 Population Age 15+ Married, Spouse Absent	363	4.82%	3,665	4.24%	28,365	4.38%
2005 Population Age 15+ Widowed	728	9.67%	7,331	8.49%	47,374	7.32%
2005 Population Age 15+ Divorced	778	10.33%	8,820	10.21%	65,113	10.06%
2005 Owner Occupied Housing Units	2,759	68.80%	29,660	65.44%	204,819	60.63%
2005 Renter Occupied Housing Units	1,251	31.20%	15,667	34.56%	133,018	39.37%
2005 Per Capita Income	\$20,922		\$23,537		\$27,603	
2005 Median Household Income	\$41,187		\$46,446		\$53,557	
2005 Average Household Income	\$48,610		\$57,108		\$65,749	
Aggregate Household Effective Buying Income	\$156,407,500		\$2,041,162,500		\$17,715,012,500	
Aggrgte. Hshld. Effective Buying Income Density (per Sq. Mile)	\$85,189,270		\$58,605,257		\$43,486,723	
Median Household Effective Buying Income	\$34,574		\$38,323		\$43,450	
Average Household Effective Buying Income	\$39,004		\$45,032		\$52,437	
2005 Employed Population Age 16+ by Industry						
Agriculture, Forestry, Fishing, Hunting, and Mining	6	0.13%	68	0.13%	532	0.13%
Construction	312	6.82%	3,062	5.81%	22,099	5.58%
Manufacturing	594	12.99%	7,611	14.45%	57,379	14.50%
Wholesale Trade	199	4.35%	2,038	3.87%	15,072	3.81%
Retail Trade	586	12.81%	6,158	11.69%	45,078	11.39%
Transportation, Warehousing, and Utilities	272	5.95%	3,106	5.90%	18,592	4.70%
Information	197	4.31%	1,433	2.72%	10,999	2.78%
Finance, Insurance, Real Estate, Rental and Leasing	385	8.42%	3,910	7.42%	31,247	7.89%
Prof., Scientific, Mngmnt Admin. and Waste Management	326	7.13%	5,306	10.07%	45,205	11.42%
Educational, Health, and Social Services	899	19.65%	11,321	21.50%	82,294	20.79%
Arts, Entertmnt., Rec., Accommodation & Food Services	328	7.17%	3,865	7.34%	33,502	8.46%
Other Services	350	7.65%	2,689	5.11%	18,072	4.57%
Public Administration	120	2.62%	2,101	3.99%	15,744	3.98%
Total	4,574	100.00%	52,668	100.00%	395,815	100.00%
2005 Employed Population Age 16+ by Occupation						
Mangmnt., Business, and Financial Operations Occupations	422	9.23%	6,427	12.20%	58,334	14.74%
Professional and Related Occupations	649	14.19%	10,170	19.31%	88,689	22.41%
Service Occupations	810	17.71%	8,102	15.38%	59,059	14.92%
Sales and Office Occupations	1,522	33.28%	15,974	30.33%	111,546	28.18%
Farming, Fishing, and Forestry Occupations	12	0.26%	81	0.15%	424	0.11%
Construction, Extraction, and Maintenance Occupations	482	10.54%	4,107	7.80%	27,809	7.03%
Production, Transprt., and Material Moving Occupations	677	14.80%	7,807	14.82%	49,954	12.62%
Total	4,574	100.00%	52,668	100.00%	395,815	100.00%
Blue Collar	1,159	25.34%	11,914	22.62%	77,763	19.65%
White Collar	2,593	56.69%	32,553	61.81%	258,409	65.29%
Service & Farm	822	17.97%	8,201	15.57%	59,643	15.07%
Total	4,574	100.00%	52,668	100.00%	395,815	100.00%
2005 Workers Age 16+ Avg. Travel Time to Work	26		26		25	
2005 Estimated Consumer Buying Power by Retail Store Type (in Thousands)		(Density by Square Mile)		(Density by Square Mile)		(Density by Square Mile)
All Retail Stores	\$99,495	\$54,191	\$1,219,194	\$35,005	\$9,527,779	\$23,389
Grocery Store	\$21,259	\$11,579	\$251,266	\$7,214	\$1,878,035	\$4,610
Eating Places	\$12,363	\$6,733	\$147,568	\$4,237	\$1,163,577	\$2,856
Drinking Places	\$624	\$340	\$7,386	\$212	\$60,283	\$148
Health & Personal Care Stores	\$7,096	\$3,865	\$83,793	\$2,406	\$620,409	\$1,523
Building Material & Garden Equipment & Supplies Dealers	\$2,848	\$1,551	\$35,417	\$1,017	\$267,801	\$657

Hardware Stores	\$314	\$171	\$3,944	\$113	\$30,329	\$74
Lawn & Garden Equipment & Supplies Dealers	\$439	\$239	\$5,383	\$155	\$41,035	\$101
Furniture Stores	\$2,069	\$1,127	\$27,565	\$791	\$229,180	\$563
Other Home Furnishing Stores	\$1,593	\$867	\$20,612	\$592	\$165,515	\$406
Appliance Stores	\$583	\$318	\$7,241	\$208	\$55,835	\$137
Radio, TV & Other Electronics	\$1,113	\$606	\$14,320	\$411	\$118,076	\$290
Department Stores	\$9,598	\$5,228	\$121,487	\$3,488	\$959,712	\$2,356
Clothing & Clothing Accessory Store	\$6,067	\$3,305	\$80,010	\$2,297	\$658,840	\$1,617
Shoe Stores	\$771	\$420	\$10,007	\$287	\$80,120	\$197
General Merchandise Stores	\$14,335	\$7,808	\$178,801	\$5,134	\$1,401,635	\$3,441
Warehouse Clubs & Superstores	\$3,731	\$2,032	\$44,777	\$1,286	\$342,586	\$841
Full-Service Restaurants	\$6,951	\$3,786	\$83,450	\$2,396	\$673,794	\$1,654
Fast Food restaurants	\$5,412	\$2,948	\$64,118	\$1,841	\$489,783	\$1,202
Jewelry Stores	\$877	\$478	\$12,165	\$349	\$109,041	\$268
Book Stores	\$705	\$384	\$9,726	\$279	\$90,870	\$223
Gift, Novelty, & Souvenir	\$617	\$336	\$7,484	\$215	\$60,135	\$148
Florists	\$162	\$88	\$2,050	\$59	\$15,879	\$39
Hobby, Toy, & Game Shops	\$667	\$363	\$8,601	\$247	\$67,768	\$166
Sporting Goods Stores	\$778	\$424	\$10,475	\$301	\$87,309	\$214
Camera & Photographic Supply	\$84	\$46	\$1,117	\$32	\$9,080	\$22
Luggage & Leather Goods	\$65	\$35	\$947	\$27	\$8,281	\$20
Sewing, Needlework & Piece Goods Stores	\$133	\$72	\$1,706	\$49	\$13,613	\$33
Convenience Stores	\$1,171	\$638	\$13,384	\$384	\$101,423	\$249
Home Centers	\$698	\$380	\$8,741	\$251	\$66,481	\$163
Nursery & Garden Centers	\$366	\$199	\$4,473	\$128	\$34,268	\$84
Computer & Software Stores	\$579	\$316	\$7,802	\$224	\$65,339	\$160
Clothing Accessory Stores	\$92	\$50	\$1,257	\$36	\$10,806	\$27
Auto Dealers	\$19,141	\$10,425	\$235,973	\$6,775	\$1,892,079	\$4,645
Automotive Part, Accessories & Tire Stores	\$964	\$525	\$11,552	\$332	\$88,964	\$218
Gasoline Stations with Convenience Stores	\$5,984	\$3,259	\$68,147	\$1,957	\$514,636	\$1,263
Gasoline Stations without Convenience Stores	\$2,424	\$1,320	\$27,856	\$800	\$209,813	\$515
Electronic Shopping & Mail Order	\$2,860	\$1,558	\$36,543	\$1,049	\$295,577	\$726
Total Accomodation & Food Services	\$15,400	\$8,388	\$185,811	\$5,335	\$1,477,071	\$3,626
Sporting Goods, Hobby, Book & Music Stores	\$2,506	\$1,365	\$33,140	\$951	\$282,618	\$694
Office Supplies & Stationary Stores	\$189	\$103	\$2,492	\$72	\$20,802	\$51
GAFO: General Merchandise, Apparel, Furniture, Other Stores	\$29,100	\$15,850	\$372,781	\$10,703	\$3,002,649	\$7,371
2005 Establishments by Type						
Private Sector	195	85.15%	2,359	84.22%	28,808	86.79%
Government	34	14.85%	442	15.78%	4,383	13.21%
All Industries	229	100.00%	2,801	100.00%	33,191	100.00%
2005 Establishments by Sector						
All Retail	56	24.45%	678	24.21%	6,833	20.59%
Fianance-Insurance-Real Estate	27	11.79%	262	9.35%	3,221	9.70%
Services	105	45.85%	1,296	46.27%	15,159	45.67%
Agriculture	5	2.18%	42	1.50%	459	1.38%
Mining	0	0.00%	0	0.00%	11	0.03%
Construction	17	7.42%	215	7.68%	2,184	6.58%
All Maunufcaturing	9	3.93%	119	4.25%	2,160	6.51%
Transportation, Communication, & Public Utilities	4	1.75%	60	2.14%	936	2.82%
Wholesale Trade	4	1.75%	97	3.46%	1,530	4.61%
Total	227		2,769		32,493	
Establishments by Service SubSector						
Hotels & Other Lodging	0	0.00%	5	0.40%	111	0.78%
Personal Services	23	21.90%	190	15.14%	1,696	11.88%
Business Services	11	10.48%	95	7.57%	1,816	12.72%
Repair Services	9	8.57%	124	9.88%	1,241	8.69%
Motion Picture & Amusement	6	5.71%	77	6.14%	755	5.29%
Health Services	17	16.19%	236	18.80%	2,575	18.04%
Leagal Services	1	0.95%	32	2.55%	938	6.57%
Educational Services	10	9.52%	82	6.53%	764	5.35%
Social Services	22	20.95%	328	26.14%	2,921	20.46%
Engineering & Mgmt Services	6	5.71%	86	6.85%	1,457	10.21%
Total	105	100.00%	1,255	100.00%	14,274	100.00%
2005 Employees by Industry Type						
All Industries	2,647	100.00%	34,318	100.00%	583,521	100.00%
Private Sector	1,700	64.22%	27,138	79.08%	486,310	83.34%
Government	947	35.78%	7,180	20.92%	97,211	16.66%
2005 Establishments by Sector						
All Retail	529	20.46%	9,463	28.10%	108,174	19.29%
Fianance-Insurance-Real Estate	111	4.29%	1,540	4.57%	42,080	7.50%
Services	1,673	64.72%	15,954	47.38%	240,902	42.95%
Agriculture	44	1.70%	341	1.01%	3,095	0.55%
Mining	0	0.00%	0	0.00%	139	0.02%
Construction	77	2.98%	1,687	5.01%	23,419	4.18%
All Maunufcaturing	100	3.87%	2,266	6.73%	92,483	16.49%
Transportation, Communication, & Public Utilities	37	1.43%	1,104	3.28%	24,886	4.44%

Wholesale Trade	14	0.54%	1,319	3.92%	25,674	4.58%
	2,585	100.00%	33,674	100.00%	560,852	100.00%
Employees in the Service SubSector						
Hotels & Other Lodging	0	0.00%	76	0.48%	3,342	1.42%
Personal Services	74	4.42%	766	4.86%	8,772	3.74%
Business Services	64	3.83%	481	3.05%	25,374	10.82%
Repair Services	24	1.43%	536	3.40%	7,437	3.17%
Motion Picture & Amusement	66	3.95%	617	3.92%	9,915	4.23%
Health Services	539	32.22%	5,903	37.46%	72,487	30.90%
Legal Services	4	0.24%	127	0.81%	7,663	3.27%
Educational Services	247	14.76%	2,978	18.90%	40,998	17.48%
Social Services	638	38.14%	3,558	22.58%	33,544	14.30%
Engineering & Mgmt Services	17	1.02%	715	4.54%	25,068	10.69%
Total	1,673	100.00%	15,757	100.00%	234,600	100.00%
Employees by Occupation Sectors						
Executive & Professional Total	899	33.96%	12,481	36.40%	200,787	34.41%
Administration & Support Total	529	19.98%	7,913	23.07%	165,597	28.38%
Service Personnel: Total	744	28.11%	6,184	18.03%	75,073	12.86%
Trade & Labor: Total	475	17.94%	7,715	22.50%	142,139	24.36%
Total Employment	2,647	100.00%	34,293	100.00%	583,596	100.00%
Employees by Occupation SubSectors						
Executive & Professional						
Management	196	21.80%	2,414	19.34%	45,462	22.64%
Sales & Marketing	217	24.14%	4,732	37.91%	66,370	33.05%
Health, Legal & Social	236	26.25%	2,327	18.64%	32,819	16.35%
Engineers, Scientists & Computer Professionals	19	2.11%	407	3.26%	16,397	8.17%
Educators	191	21.25%	2,025	16.22%	27,053	13.47%
Journalists & Creative Professionals	40	4.45%	576	4.62%	12,686	6.32%
Total	899	100.00%	12,481	100.00%	200,787	100.00%
Administration & Support						
Management Support	56	10.59%	793	10.02%	22,320	13.48%
Administrative & Clerical Support	371	70.13%	5,732	72.44%	118,034	71.28%
Technical Support	102	19.28%	1,388	17.54%	25,243	15.24%
Total	529	100.00%	7,913	100.00%	165,597	100.00%
Service Personnel						
Health Care	198	26.61%	1,378	22.28%	13,028	17.35%
Food & Beverage	340	45.70%	3,225	52.15%	38,901	51.82%
Personal Services	187	25.13%	1,323	21.39%	15,266	20.33%
Protective Services	19	2.55%	258	4.17%	7,878	10.49%
Total	744	100.00%	6,184	100.00%	75,073	100.00%
Trade & Labor						
Construction	51	10.74%	1,109	14.37%	18,955	13.34%
Installation & Repair	178	37.47%	2,492	32.30%	35,991	25.32%
Craft Production	30	6.32%	549	7.12%	13,956	9.82%
Machine Operators	38	8.00%	720	9.33%	20,165	14.19%
Assemblers	9	1.89%	338	4.38%	10,501	7.39%
Transportation	66	13.89%	956	12.39%	17,364	12.22%
Agriculture	46	9.68%	450	5.83%	5,406	3.80%
Laborers	57	12.00%	1,101	14.27%	19,801	13.93%
Total	475	100.00%	7,715	100.00%	142,139	100.00%
Number of Retail Establishments by Type						
Building Materials & Garden Supplies	1	1.79%	29	4.28%	382	5.59%
General Merchandise Stores	1	1.79%	28	4.13%	197	2.88%
Food Stores	8	14.29%	67	9.88%	675	9.88%
Auto Dealers & Service Stations	4	7.14%	88	12.98%	652	9.54%
Apparel & Accessory	3	5.36%	67	9.88%	550	8.05%
Home Furniture	7	12.50%	54	7.96%	798	11.68%
Eating & Drinking Places	18	32.14%	164	24.19%	1,794	26.25%
Miscellaneous Retail	14	25.00%	181	26.70%	1,785	26.12%
All Retail	56	100.00%	678	100.00%	6,833	100.00%
Estimated Sales by Industry Type (in Millions)						
Building Materials & Garden Supplies	\$0.50	1.13%	\$59.60	4.67%	\$940.90	7.16%
General Merchandise Stores	\$0.10	0.23%	\$90.50	7.09%	\$1,025.70	7.81%
Food Stores	\$6.90	15.58%	\$214.10	16.78%	\$2,299.10	17.51%
Auto Dealers & Service Stations	\$3.70	8.35%	\$493.60	38.69%	\$2,965.70	22.58%
Apparel & Accessory	\$0.40	0.90%	\$45.40	3.56%	\$381.70	2.91%
Home Furniture	\$4.20	9.48%	\$96.10	7.53%	\$1,658.30	12.63%
Eating & Drinking Places	\$15.50	34.99%	\$141.50	11.09%	\$1,723.30	13.12%
Miscellaneous Retail	\$13.00	29.35%	\$134.90	10.57%	\$2,138.80	16.29%
All Retail	\$44.30	100.00%	\$1,275.70	100.00%	\$13,133.50	100.00%