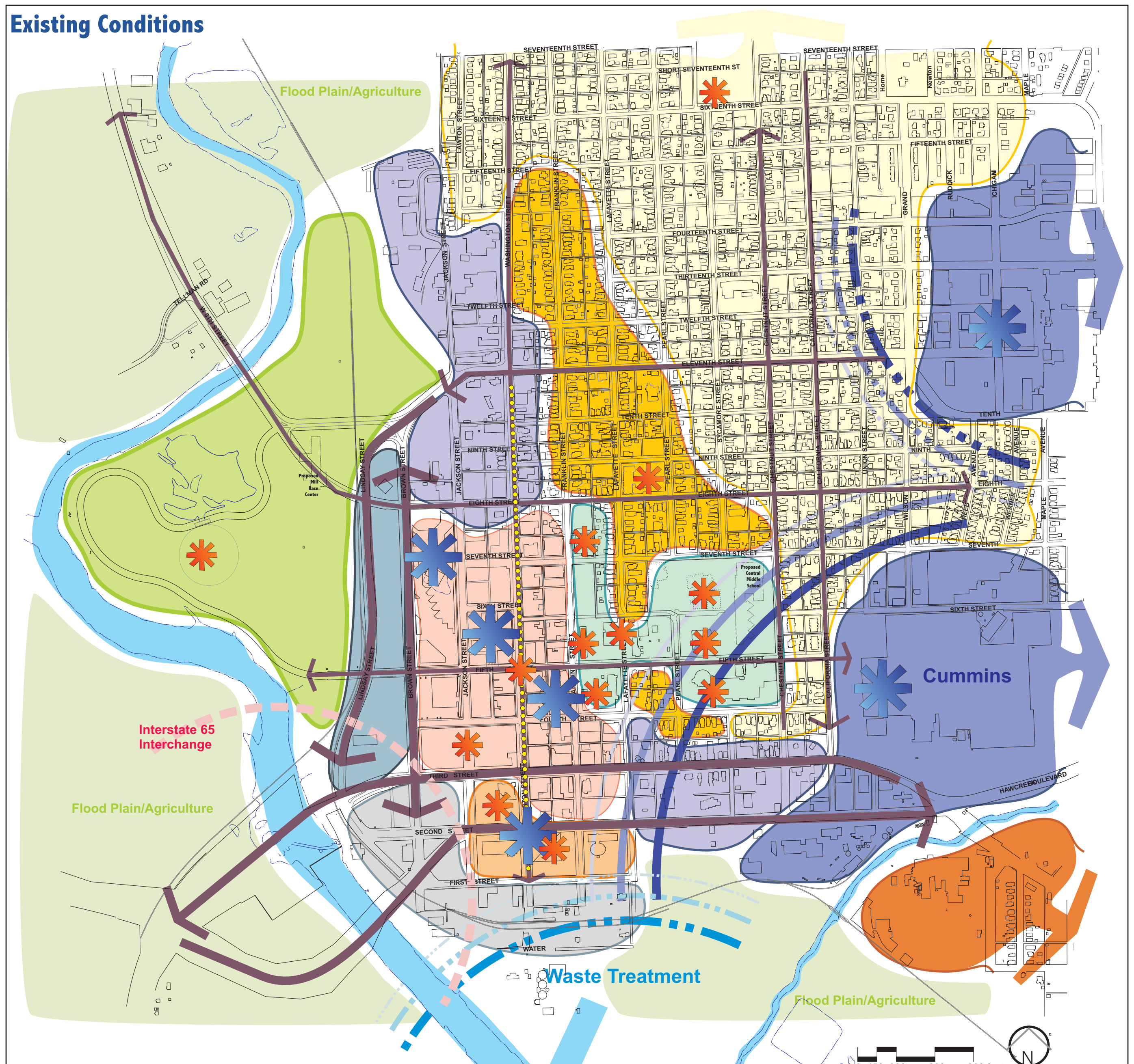
2. Taking Stock of the Community

a. Existing Conditions
b. Market Findings
c. Public Process

Community Analysis

An important component of this planning process included conducting an inventory of the various elements that comprise downtown and the broader community's view. This section summarizes the findings of the analysis of the physical environment, community desires and market and economic conditions for Downtown Columbus.



Existing Conditions

Legend

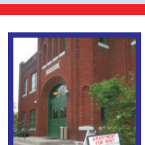
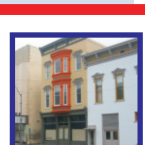
- **Distinctive Downtown Core Area** — Pedestrian-oriented mixed-use center
- **Mixed-use Neighborhood/Commercial Transition Area** — Auto-oriented small-scale businesses & services linking downtown to neighborhoods & industrial areas
- **Institutional Area** — Concentration of schools, churches & other public services
- **Business/Industrial Area** — Manufacturing, distribution & light industrial
- **Government Center** — Public offices, city/county administration, courthouse, jail
- **East Columbus**
- **Riverfront Open Space**
- **Downtown Office/Mall Parking**
- **Downtown Residential** — Principally historic single-family residential
- **Near Downtown Residential** — Working class single-family residential area
- **Downtown Gateway/Transition Area** — Gateway into downtown, professional offices, redevelopment opportunities
- Study Area Boundaries
- Focus Area Boundaries
- Major Employment Centers (100+)
- Activity Generators/Points of Interest
- Gateways
- Pedestrian Oriented Corridor

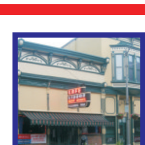
A site analysis of Downtown Columbus and its environs was conducted to determine gateways, traffic circulation, activity generators, development opportunities, pedestrian corridors, neighborhood characteristics, major points of interest, parking inventory, and land uses. Findings from this analysis are represented in the series of maps on the subsequent pages. The *Existing Conditions* diagram represents a summary of the analysis as one diagram.

The *Existing Conditions* diagram (at left) offers a distillation of the site analysis findings into a single graphic. The diagram presents various shapes that represent a conglomeration of similar land uses. The graphic also demonstrates major employment centers (represented by blue stars) and activity generators or points of interest (represented by orange stars). The downtown core is centered around Washington Street – a traditional "Main Street" with a distinct historic character. The downtown core (shaded light pink in the diagram) is the pedestrian-oriented mixed-use center of the community. The downtown core is flanked by two mixed-use neighborhood commercial areas shaded light purple in the diagram. These areas provide automobile access to downtown from outside the immediate area and are comprised of small commuter and auto-oriented businesses and services. The area just east of the downtown core (shaded light green in the diagram) is principally comprised of institutional uses including the Bartholomew County Public Library, schools, churches and other public offerings.

The areas shaded in dark purple are mainly commercial in land use including manufacturing, distribution and light industrial. The area shaded in light orange, directly south of the downtown core, is principally public in use and comprised of city and county government offices, and the county courthouse and jail. The area shaded in green to the west of the downtown core is the community gathering space Mill Race Park. Mill Race Park offers open space for community events, active and passive recreation and interaction with the East Fork of the White River. The area shaded in light gray is the downtown gateway from the west. The area is presently comprised of transitional uses including empty lots, the city garage and vacant commercial property.

Residential uses are currently concentrated to the northeast of the downtown core and are predominantly single-family. The area shaded dark orange is comprised of large historic single-family residential structures while the area shaded light yellow is generally smaller working class single-family residential homes.

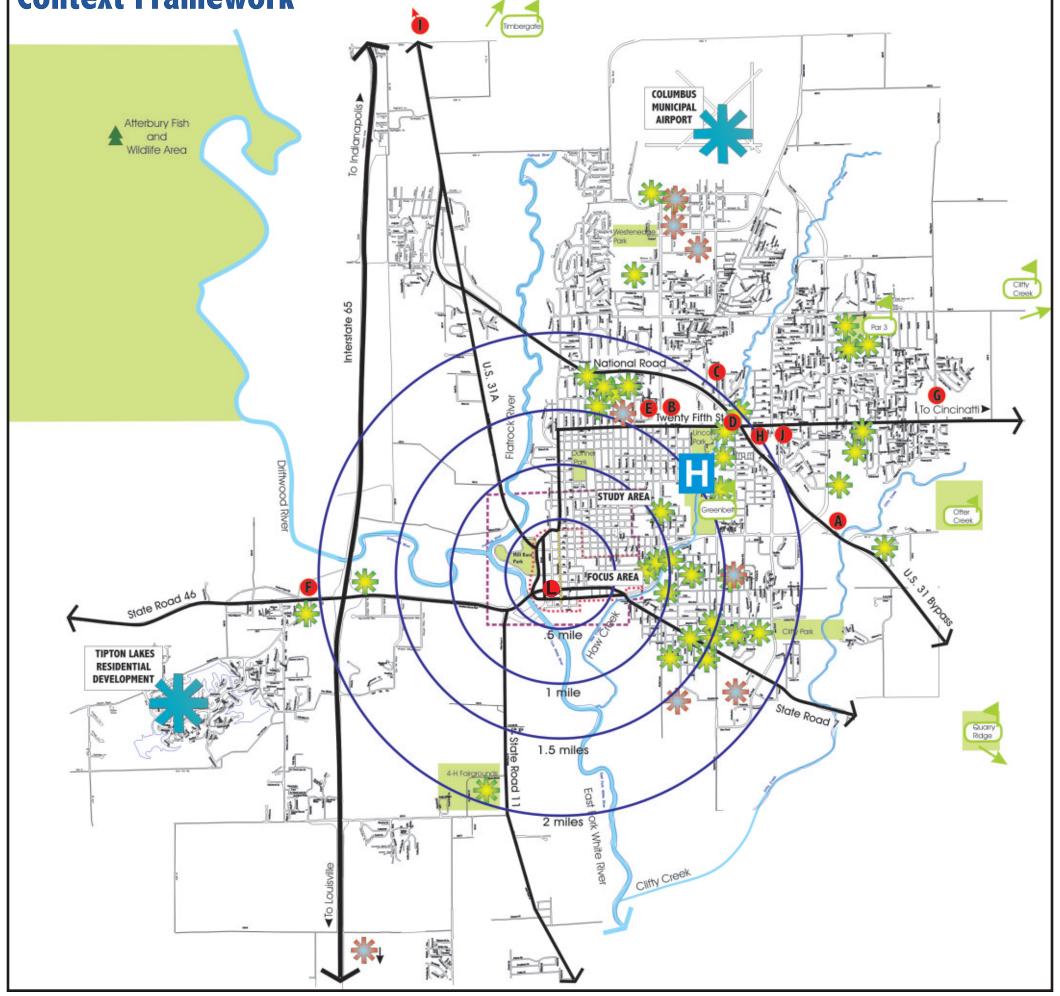


The Second Street suspension bridge (pictured above) and Bartholomew County Public Library (pictured below) are just two of 60 architecturally significant structures in Columbus. Of these 60 public and private buildings, 50 provide the most concentrated collection of contemporary architecture in the world. Columbus' program advocating for modern architecture began in 1942 with a series of events that started when the First Christian Church dedicated its new building. Designed by Eliel Saarinen, the building heralded the beginning of modern architecture in Columbus. Since then, many award-winning architects have designed buildings in Columbus including Richard Meier, I. M. Pei, Kevin Roche, and Robert Venturi.

Fifth Street connects Mill Race Park to residential and institutional uses to the east and is linked by seven of Columbus' significant works of modern architecture.

Mill Race Park occupies 85 acres at the western edge of Downtown Columbus. It includes a 500-seat performance amphitheater capable of accommodating 5,000; a round lake; a boat house for paddle boat rentals; three picnic shelters; a large playground; a basketball court; a fishing pier; a park overlook and park tower; horseshoe pits; restrooms; connection of the existing People Trail with a one-half mile River Walk; and a wetland interpretive area.

Context Framework



Context Framework Legend

Golf Courses/Country Clubs

Parks and Recreation

Columbus Regional Hospital

Shopping

- A Clifty Crossing
- B Fair Oaks Mall
- C Northern Village Center
- D Eastbrook Plaza
- E 25th Street Shopping Center
- F West Hill Shopping Center
- G Holiday Center
- H Columbus Center
- I Edinburgh Premium Outlets
- J Clover Center
- K Columbus Crossing
- L Commons Mall

Points of Interest

Significant Architectural Points

Target is one of many "big box" retail stores located on National Road (U.S. 31 Bypass) on the north side of Columbus that draws patrons from throughout Bartholomew and adjoining Counties.

Amid the famous architectural works, the Columbus Bar at the intersection of Fourth and Jackson Streets offers local residents and tourists with a place to gather.

Landmarks legend

Architectural Tour Route

Significant Architectural Point

1. Columbus Area Visitors Center
2. Lincoln Elementary School
3. St. Peter's Lutheran Church
4. First Christian Church
5. Cleo Rodgers Memorial Library
6. Columbus Inn
7. Irwin Union Bank and Trust
8. Irwin Union Bank and Trust Arcade
9. Cummins Inc. Corporate Office
10. Mill Race Park
11. Columbus Post Office
12. The Commons
13. Bartholomew County Courthouse
14. The Senior Center
15. The Republic
16. City Hall
17. Bartholomew County Jail
18. Sycamore Place
19. SBC Switching Station
20. Breeden Inc., Realtors/Developers
21. Fire Station Number 1
22. Streetscape
23. Friendship Way
24. Second Street Bridge
25. Irwin Home & Gardens

Points of Interest

Study Area Boundaries
Focus Area Boundaries
Pedestrian Oriented Corridor

Landmarks

Downtown Columbus | Strategic Planning Project

Taking Stock of the Community

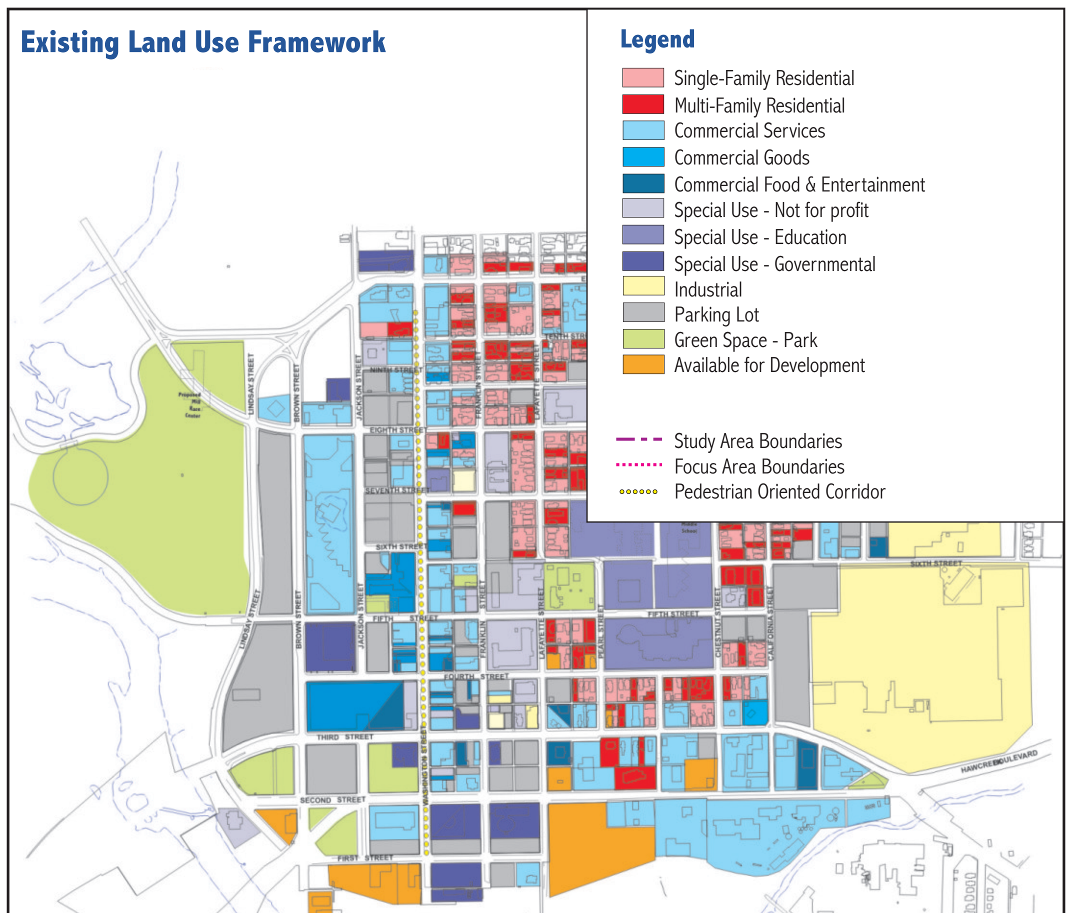
Site Analysis Key Findings

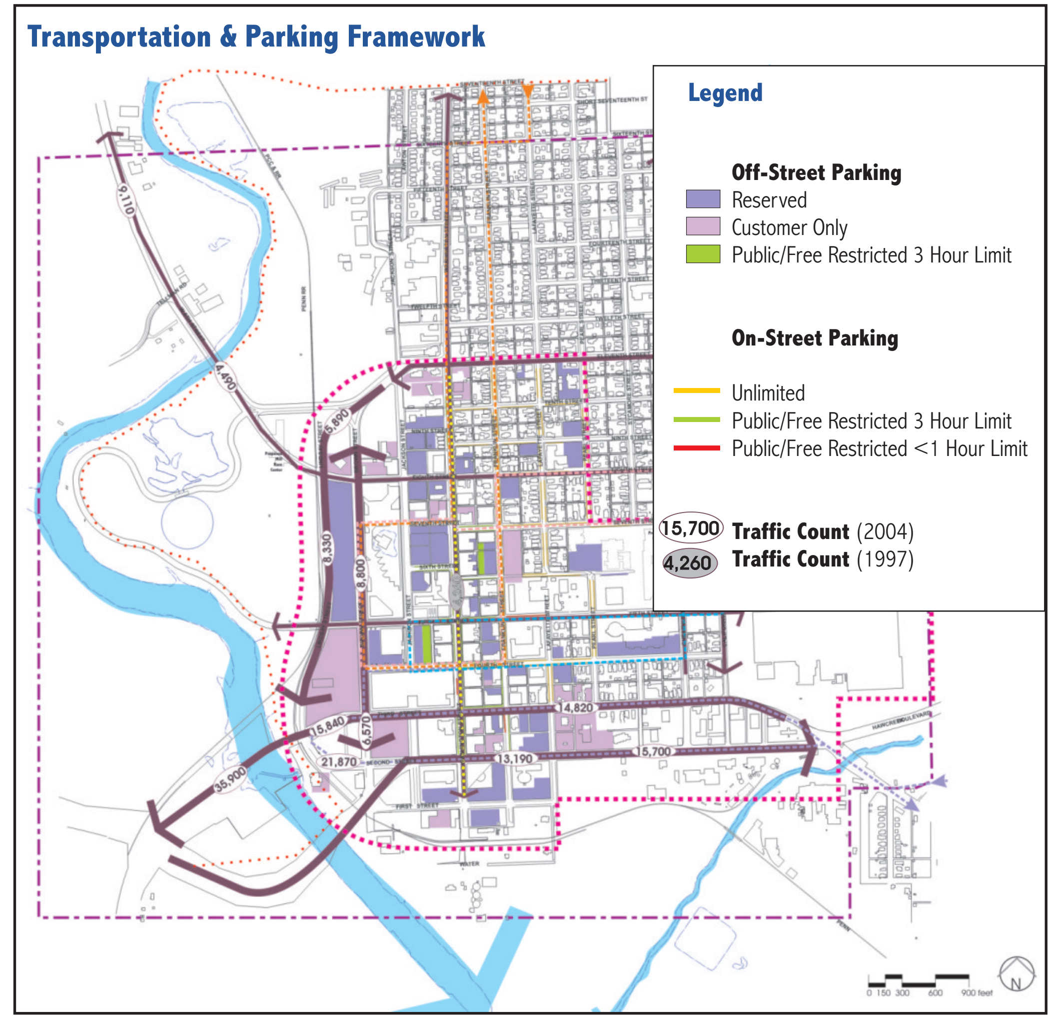
The site analysis key findings summarize the outcomes of the Downtown Columbus' physical analysis. Downtown Columbus' existing physical conditions is a significant factor influencing future investment. Findings from this study indicate that the market potential in Downtown Columbus is strong; however, physical conditions such as land use, transportation, infrastructure and character will factor into the downtown's ability to attract new development. The issues that most directly influence potential for redevelopment activity in downtown are summarized below. Several issues stem from lack of after-hours activity and lack of fully developed blocks while others are related to the way downtown is organized and the number of surface parking lots.

1. *Mostly small businesses and services at street-level in Downtown.*
The streets in Downtown Columbus were historically lined with animated shops and stores that added a vibrancy and activity to downtown. Today, these storefronts are primarily occupied by legal and banking services that are important to downtown's functionality but have a limited ability to animate the street particularly after-hours. Much care should be given to locate businesses and shops that create activity and after-hour attractions at the street-level.

2. *Few fully developed streets in downtown.*
Many blocks in downtown that were once developed are now paved for parking. Undeveloped blocks create gaps or “missing teeth” in the downtown streetscape and its ability to remain pedestrian friendly. Empty blocks should be a priority for new investment and development.

3. *Surface parking separates residential neighborhoods and parks from downtown.*
Parking in downtown is important for Downtown Columbus' functionality. However, large surface parking lots that separate downtown from surrounding neighborhoods and amenities, make downtown less attractive to walk to from nearby areas.





4. *Fifth Street is a significant architectural tourism corridor.*
Fifth Street connects the community to Mill Race Park and the neighborhoods to the east and functions as a major community “front door” for tourists.

5. *Second and Third Streets move traffic “past” downtown.*
The one-way streets, particularly Second and Third Streets, quickly and efficiently move traffic past Downtown Columbus. Travelers and visitors can easily miss downtown because it is not apparent, through signage and development cues, where downtown begins and ends.

6. *Limited residential units within the downtown.*
Like many small communities in the Midwest, Downtown Columbus housing is limited. The Columbus housing market is strongest to the north, west, and east of Columbus. Downtown housing is important to create a strong and vibrant “24-hour” downtown.

7. *Limited “after-hours” activity unless an event is programmed.*
Downtown Columbus is most active from 8 am - 5 pm. Most downtown stores and businesses close at or before 5 pm. Many of the activities and stores that remain open after 5 pm are located in the Commons Mall thus adding little animation and activity to the street.

8. *Side streets have a “fragile” level of activity.*
Most activity in Downtown Columbus is located along Washington Street and downtown offers limited pedestrian connections to surrounding neighborhoods. As a result, side streets are often devoid of activity even during normal business hours.

Mixed-use buildings on Washington Street are beginning to offer residential above with office or retail space at street-level. Many communities throughout the United States are realizing the importance of housing to downtown's success.

Coriden Law Office on Washington Street (shown above) is one of many businesses that benefits from free on-street parking in Downtown Columbus. Free on-street parking provides easy access to downtown and its businesses, however patrons and employees do find parking in some locations to be difficult during peak hours.

Legend

Underused Property

1. 330,000 sq. Ft. / 7.5 Acres
SU-11 Special Use
2. 33,500 sq. Ft. / .77 Acres
B-4 Highway Business
3. 63,000 sq. Ft. / 1.5 Acres
B-2 Business
4. 27,000 sq. Ft. / .6 Acres
B-3 Central Business
5. 138,000 sq. Ft. / 3 Acres
B-2 Business
6. 57,000 sq. Ft. / 1.3 Acres
B-3 Central Business
7. 240,000 sq. Ft. / 5.5 Acres
B-3 Central Business
8. 20,000 sq. Ft. / .5 Acres
B-3 Central Business
9. 25,000 sq. Ft. / .6 Acres
B-3 Central Business
10. 25,000 sq. Ft. / .6 Acres
R-6 Residential
11. 95,000 sq. Ft. / 2 Acres
B-3 Central Business
12. 27,000 sq. Ft. / .6 Acres
B-3 Central Business
13. 50,000 sq. Ft. / 1.1 Acres
B-3 Central Business
14. 43,000 sq. Ft. / 1 Acre
B-3 Central Business
15. 27,000 sq. Ft. / .6 Acres
B-4 Highway Business
16. 96,000 sq. Ft. / 2.2 Acres
B-3 Central Business
17. 76,000 sq. Ft. / 1.7 Acres
B-3 Central Business
18. 48,500 sq. Ft. / 1.1 Acres
B-3 Central Business
19. 52,000 sq. Ft. / 1.2 Acres
B-3 Central Business
20. 12,000 sq. Ft. / .3 Acres
B-3 Central Business
21. 12,000 sq. Ft. / .3 Acres
B-3 Central Business

Vacant Property

22. 45,000 sq. Ft. / 1 Acre
B-4 Highway Business
23. 125,000 sq. Ft. / 2.8 Acres
B-2 Community Business
24. 95,000 sq. Ft. / 2.2 Acres
B-4 Highway Business (west ½)
B-3 Central Business (east 1/2)
25. 25,000 sq. Ft. / .58 Acres
B-3 Central Business
26. 250,000 sq. Ft. / 5.7 Acres
B-5 General Business

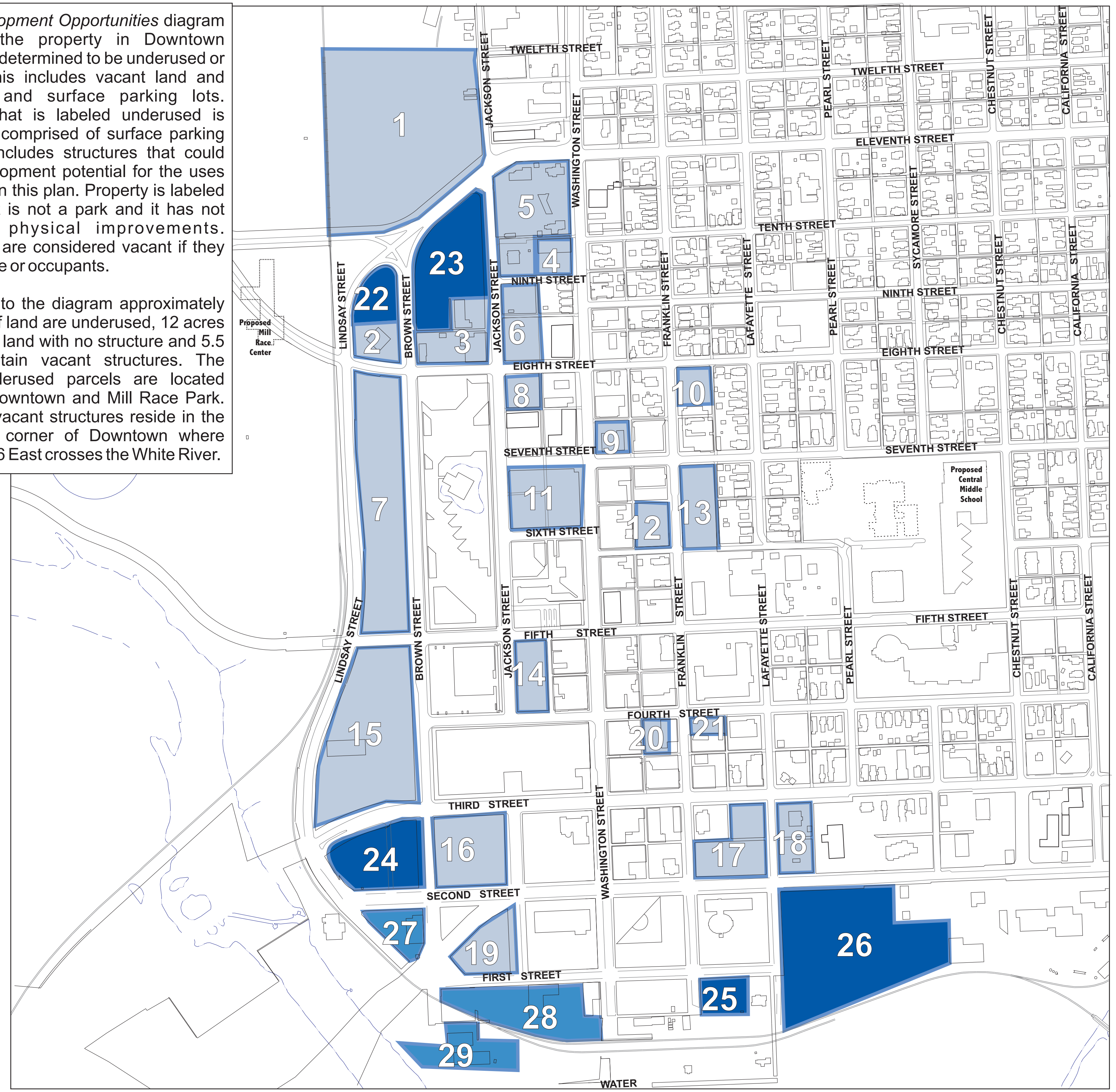
Vacant Structure

27. 28,000 sq. Ft. / .66 Acres
B-4 Highway Business
28. 127,000 sq. Ft. / 2.9 Acres
B-3 Central Business
29. 90,000 sq. Ft. / 2 Acres
I-2 Medium Industrial

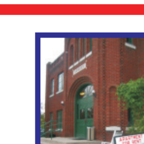
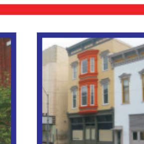
Development Opportunities

The *Development Opportunities* diagram presents the property in Downtown Columbus determined to be underused or vacant. This includes vacant land and buildings and surface parking lots. Property that is labeled underused is principally comprised of surface parking but also includes structures that could offer development potential for the uses proposed in this plan. Property is labeled vacant if it is not a park and it has not received physical improvements. Structures are considered vacant if they have no use or occupants.

According to the diagram approximately 34 acres of land are underused, 12 acres are vacant land with no structure and 5.5 acres contain vacant structures. The larger underused parcels are located between downtown and Mill Race Park. All of the vacant structures reside in the southwest corner of Downtown where Highway 46 East crosses the White River.



Source: *2005 City of Columbus Downtown Development Potential & Property Inventory*
Columbus/Bartholomew Planning Department
Source: Development Concepts, Inc.

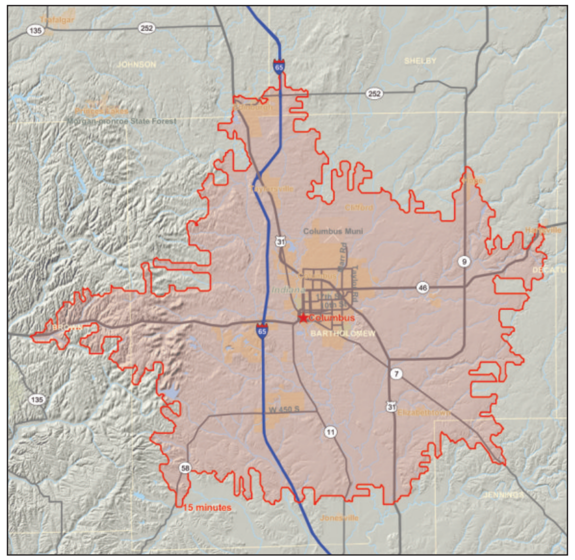
Market Findings

Market Context

Columbus is a small city (39,059) in southeast central Indiana, and the county seat of Bartholomew County (pop. 71,435). Columbus is 50 minutes south of Indianapolis on I-65 and 54 minutes east of Bloomington, Indiana on State Road 46. It is a regional business and commercial center serving residents in Bartholomew and parts of Jackson, Jennings, Decatur, Brown, Shelby and Johnson counties, and is the second largest community in these counties after Greenwood, Indiana (pop. 39,545). Columbus is traversed by State Roads 7, 11 and 46 and US Highway 31, and is the largest community for 34 miles (39 minutes) in any direction. Columbus is the centerpiece of its own metropolitan statistical area (Columbus-Bartholomew County) and is part of the greater Indianapolis-Anderson-Columbus Combined Statistical Area.[1]

Methodology

Downtown Columbus 15 Minute Drive



For the purpose of the analysis, Downtown Columbus was defined by a circle with a one-half-mile radius, emanating from the intersection of Fifth and Washington Streets. Determination of potential development directions also utilized data from residents living within a 15 minute drive of this downtown intersection.

The analysis provides a summary of the current general market conditions in the Downtown Columbus Commercial Area (downtown), its impacts on the adjacent neighborhoods and trade areas, and is useful in identifying investment and development opportunities in downtown Columbus.

Information presented in this report includes data gathered from ESRI Business Information Solutions (ESRI BIS) on or before March 2005. ESRI BIS is a national database that uses consumer spending, demographic and mapping data to analyze current markets and forecast their potential. Surveys used in this study were conducted by Development Concepts, Incorporated and Survey America of Indiana, Incorporated. All data tables, diagrams, etc. presented in this report have ESRI Business Information Solutions as their source unless otherwise stated.

Overview

An analysis of the market potential in the area supported by public comments collected from surveys of residents indicate that the first development opportunities in Downtown Columbus are the addition of “full service” casual dining restaurants with special focus on establishments open in the evenings and on the weekends and serving a medium priced menu. These restaurants will attract additional customers to downtown and thereby create activity and build market for the subsequent establishment of bars, nightclubs and additional retail development. Additional opportunities, such as a hotel, will provide downtown with the means to capture demand from tourist and downtown employees, as well as improve the downtown business climate. The types of establishments which have the greatest potential in downtown are niche restaurants and shops, potentially developed by local entrepreneurs and stressing unique product lines or services such as a local micro-brewery or bar featuring live entertainment or dancing.

Market Opportunity

Downtown Columbus experienced a period of economic stagnation from 1990-2000, which appears to be turning. Continued improvement will require the effective and concerted intervention from both the public and private sectors. There is a need to improve housing stock, enterprise development and parking. This will require thoughtful use of resources and incentives to encourage optimal reinvestment in the community in order to stem the decline and encourage the development of a competitive and vibrant downtown

Columbus should focus on incremental steps to improve the respective environments (live, work, play and shop) encouraging private investment while targeting markets which will provide additional resources to downtown and help to create a more positive, dynamic environment. Examples of such developments might include the establishment of a senior living neighborhood for active seniors and empty nesters and a separate enclave for the young, urban professional market. Policies designed to encourage the restoration of Columbus' older character-laden neighborhoods and older housing should be a policy priority.

With regard to entertainment and shopping, adopting policies which encourage the development of entertainment space including an active night life area in downtown and the creation of a significant local performing arts venue/exhibition space would be helpful. An early priority, however, should be extended to filling immediate community needs in the areas of food and beverage stores (i.e. groceries) and health and personal care stores. This should quickly be expanded to include additional casual dining and lifestyle retail development. Local businesses should be encouraged to effectively co-market/co-promote tourism activities with their respective retail counterparts.

Finally, in terms of employment, Downtown Columbus has substantial distance to cover in terms of diversifying its employment base. Strong evidence exists for a direct correlation between diversity, downtown quality of life and the ability to retain and expand job growth in high value industries.[2] Special attention should be paid to improving employment/educational opportunities for downtown residents at the lower end of the economic spectrum while attracting higher value manufacturing and professional positions. This will require definitive solutions for addressing parking and office space issues as well as providing appropriate incentives for downtown development.

Current Market Findings

Demographics

The Odd Fellows building at the intersection of Sixth and Washington Streets is one location offering downtown housing.

- Columbus' downtown has experienced declines in population, income and educational attainment from 1990 through 2004.
- Household size (family size) is continuing to drop, and households are much smaller (23%) downtown than in Columbus overall. This is the result of a relative loss of married couples causing downtown to become proportionally higher in non-family households (i.e. single parents, singles, etc.).
- Downtown residents are less educated and have lower median incomes.
- Residents, and especially children, are living in increasingly poorer, more transient households often headed by younger, single parents.

Living

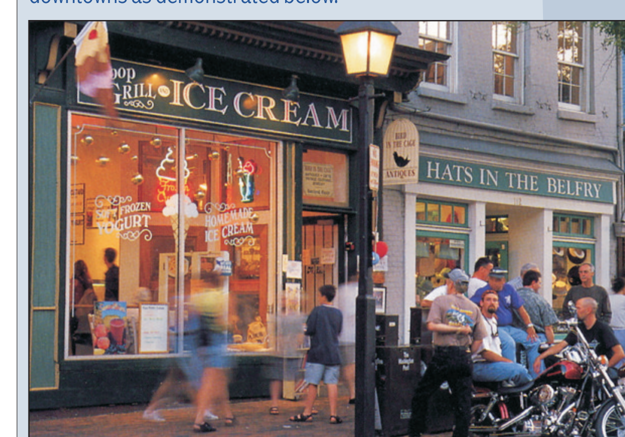
- The downtown housing market is not a vibrant market. It is characterized by higher

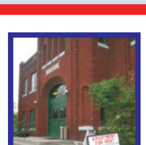
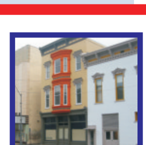
The income level within a trade area is critical to the success of a proposed center, not only in terms of total available dollars but also in relation to disposable income.
-ULI Shopping Center Development Handbook

Did you know?

The current trend in suburban retail development is open-air centers containing upscale specialty stores, dining and entertainment. Often called “lifestyle centers”, these open-air malls are not usually anchored, but may include a large-format bookstore and multiplex cinema dispersed among small department stores. The lifestyle center endeavors to create a “sense of place” by employing elements mimicking the architecture, atmosphere and streetscapes of the traditional Main Street (i.e. Washington Street). One example, as pictured above is Clay Terrace in Carmel Indiana.

The growth of lifestyle centers across the U.S. is a strong indicator that open-air shopping is becoming popular once again. More than 100 lifestyle centers are in operation across the U.S., and that number is expected to increase to 200 by the year 2007. With careful adaptation, downtowns can capture the growth in the lifestyle center trend. Downtowns maintain a distinct advantage over lifestyle center developments that simply imitate traditional downtown shopping but do not capture the rich and unique activity associated with real mixed-use downtowns as demonstrated below.



"Demand for houses within walking distance of stores and other amenities is much stronger than most communities realize"…
-Dowell Myers University of Southern California

Did you know?

Downtowns are becoming viable housing options for a growing number of people. In particular, two groups are fueling much of the interest:

Empty Nesters. Aging baby boomers means more "empty nesters" with changing lifestyles which often results in downsizing homes & additional leisure time to dine out and enjoy cultural activities – downtown becomes a desirable place to live for this demographic.

Young Professionals. These are typically 20- and 30-year olds who have not yet started a family & often enjoy amenities and activities found in many downtowns. This group also has an interest in low-maintenance housing convenient to work & services.

The positioning of a destination… begins with an assessment of its potential distinctiveness within a market region.
-ULI - Developing Retail Entertainment Destinations

vacancy rates and dramatically lower owner-occupancy rates than Columbus overall.
- Columbus' downtown market has marginal growth in housing units due primarily to increases in multi-family housing.
- Housing stock in downtown is of lower value and appreciating at a slower rate than similar properties elsewhere in the Columbus area.
- A substantial portion of growth in the broader community has been transfer growth of families to more suburban environments elsewhere in the city and county.

Hilliard Lyons, at the intersection of Fifth and Washington Streets, of is one of many employers in Downtown Columbus.

- From 1990-2000, single-family housing was being converted into multi-family housing, suggesting a limited supply of quality leasing stock downtown.

Working
- The downtown workplace is a center of professional services, government and predominately business-to-business enterprises.
- The vast majority of downtown employees are engaged in either "white collar" or "blue collar" work, but most downtown residents are employed in low wage, service or early career manufacturing/light manufacturing jobs.
- Downtown specifically has a very low labor participation rate and higher unemployment rates relative to the rest of the community.
- Columbus' employees engaged in manufacturing ranges from 45% (downtown) to 34% (Columbus overall). This is three times the national average and twice the Indiana average.
- Columbus has an enviable downtown workplace environment and should endeavor to maintain, retain and grow downtown as a preferred business location.

Shopping
- Surveys of Columbus residents, students, business owners, and community leaders found that …
  - Washington Street ranked 11th out of 12 possible shopping destinations.
  - Hobby and special interest stores would bring residents downtown.
  - The most convenient time to come downtown was evenings after 5PM and on weekends.
  - Shopping is complicated by difficult parking conditions.
- There is a shortage of supply in downtown for "food and beverage" establishements and "health and personal care" stores.
- Downtown Columbus has additional demand potential resulting from tourists spending, and studies of tourist spending in southern Indiana reveal that 21% of tourist dollars are spent on shopping. This is the largest component of tourist spending activity.

Smith's Row Food & Spirits near the intersection of Fourth and Washington Streets is a popular downtown venue.

Playing
- Except for festivals, downtown does not generally figure into the majority of resident's entertainment choices.
- Survey respondents consistently highlighted the need for additional casual dining (mid-market), shopping and evening/performing arts entertainment options.
- 89% of respondents indicated that the most convenient time for dining downtown was evenings (51.7%) and weekends (37.3%).
- Survey responses suggest additional dining options are a priority over improvements in the shopping, but selection was an important theme reinforced in the survey responses.
- Parking is perceived as a major issue by 82% of respondents.
- Average tourist daily spending is $73 and 21-22% of that was spent on dining.

Development Direction

Several surveys of Columbus residents suggested that the presence of the following types of activities were likely to increase their visits to Downtown Columbus. Table 1 presents an average, indexed score ranging from one to five for each type of activity with higher scores indicating more attractive alternatives to Columbus residents.

Table 1 - What Would Bring Residents Downtown?

Entertainment Option	Average Indexed Survey Response
Dining	
Casual Dining	2.94
Specialty Foods	2.88
Fine Dining	2.77
Fast Food/ Take-Out	2.41
Entertainment	
Performing Arts	2.76
Evening Entertainment	2.54
Art Galleries	2.45
Shopping	
Hobby/ Special Interest Shops	2.72
Pet Store Supplied	2.21

Sales Capture Scenarios

So, how do Columbus get from these survey responses to development directions? How many and what types of restaurants, entertainment and shopping options are likely to be successful in downtown? In order to make this determination, an analysis was performed on the retail market potential (supply vs. demand) for individuals living within a 15 minute drive of Downtown Columbus. Additional demand may be captured from downtown employees and tourists. For three possible sales capture scenarios, we evaluated the supply and demand data using a comparison of the expected square footage vs. the national average for each establishment category and three "retail rules of thumb" related to gross sales.[3]

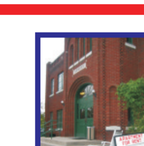
Sales Capture Scenarios
1. 10% market demand plus 25% unrealized demand
2. 25% market demand plus 25% unrealized demand
3. 10% market demand plus 50% unrealized demand

Retail Rules of Thumb
Gross leasable area should exceed the national average.
Expected gross sales should exceed $500,000 for neighborhood stores.
Expected gross sales should exceed $1,000,000 for community stores.

The results point the way to the categories with the greatest chances of success in the downtown market. The market potential index (MPI) was then incorporated to refine the picture of the successful type of establishments in each category. MPI measures the relative likelihood (or potential) of households in the specified geography to exhibit certain consumer behavior or purchasing patterns compared to the U.S. Average. This information is based on the Bureau of Labor Statistics' Consumer Expenditure Interview Survey. Spending patterns are differentiated by socioeconomic characteristics and geography. They are updated to current pricing using the Consumer Price Index.

Dining

In the case of dining, residents living within 15 minutes of Downtown Columbus spend more than 92.5 million dollars annually at restaurants and bars (nearly 16% on alcoholic




beverages); however, these same residents would spend 98.6 million dollars if the right choices were available. This leaves an unrealized demand of 6.1 million dollars in the dining market. This unrealized demand is distributed in the market with 73.4% going to full service restaurants, 25.6% going to bars and nightclubs and the remaining 1% going to fast food and take-out restaurants.

Under the first sales capture scenario, there is ample demand to support the establishment of one or more Full-Service or Limited Service Restaurants and sufficient demand for a smaller bar/pub. Since the second and third scenarios are more aggressive, the prospects for establishing new, successful ventures improve in each.

	Potential Sales (P$)	How many new restaurants could be supported by this demand?	Does the required space exceed the average space?	Does Expected Gross Sales exceed M$0.5?	Gross Sales exceed M$1?
Full-Service Restaurants	$7,230,306	8.5	Yes	Yes	Yes
Limited-Service Eating Places	$2,935,311	1.9	Yes	Yes	Yes
Drinking Places (Alcoholic Beverages)	$613,170	0.8	No	Yes	No

Examples of the types of full service and limited service restaurants which are preferred by individuals living within a 15 minute drive of downtown are displayed in the following table, and the higher the MPI the greater the restaurants likelihood of attracting business. An MPI of 100 represents a market potential equal to that of the national average. Within a 15 minute drive of downtown the average MPI for full service restaurants is 101 while the average MPI for limited service restaurants is 103.

Table 2 - Selected MPIs for Sample Restaurants Serving the 15 minute travel time

Full Service Restaurants	MPI	Limited Service Restaurant	MPI
Chi-Chi`s	124	Steak`n Shake	121
Applebees	108	A & W	110
Lone Star Steakhouse	108	Subway	105

Shopping

In all three sales capture scenarios, there was ample demand to meet the minimum rules of thumb; however, there was insufficient demand to support an establishment comparable in size to the national average establishment of that type. In each case the differences are quite large never exceeding half a store.

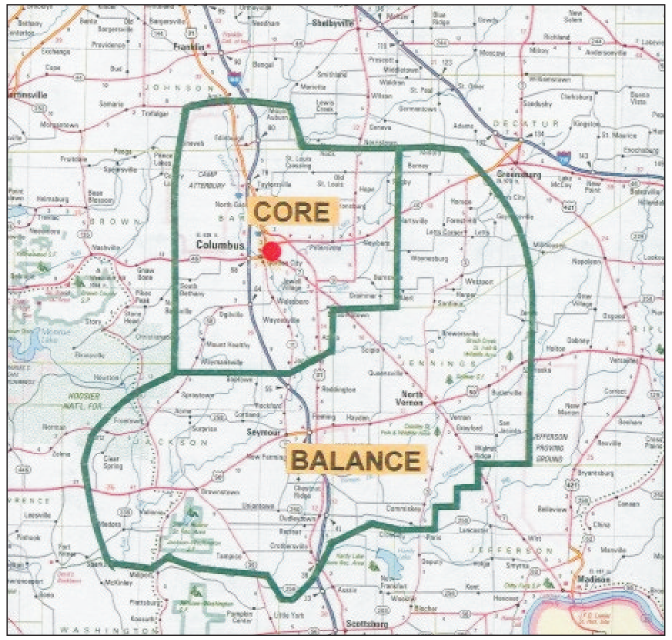
Shopping	Potential Sales (P$)	How many new stores could be supported by this demand?	Does the required space exceed the average space?	Does Expected Gross Sales exceed M$0.5?	Gross Sales exceed M$1?
Books, Periodical & Music Stores					
Scenario 1	$449,831	0.3	no	No	No
Scenario 2	$768,515	0.5	no	Yes	No
Scenario 3	$646,552	0.4	no	Yes	No
Office Supplies, Stationary & Gift Stores					
Scenario 1	$677,800	0.1	no	Yes	No
Scenario 2	$917,952	0.2	no	Yes	No
Scenario 3	$1,334,274	0.3	no	Yes	Yes
Used Merchandise Stores					
Scenario 1	$103,734	0.1	no	No	No
Scenario 2	$123,679	0.2	no	No	No
Scenario 3	$229,416	0.3	no	No	No

While this does not preclude a special, niche store or a store with exceptional marketing capabilities, such as Eddie Bauer and Coldwater Creek, it might require additional business support measures. The following products show market potentials above the U.S. average and might pose an appreciable opportunity for the right retailer. Some examples of retail activities which might be able to garner sufficient market share are listed below.

Table 3 - MPIs for Various Shopping Activities

Apparel (Adults)	MPI	Pets (Households)	MPI
Bought Any Men's Apparel	104	HH Owns Any Pet	112
Bought Any Women's Apparel	100	HH Owns Any Cat	113
Bought Children's Apparel in Last 6 Months	103	HH Owns Any Dog	114
Bought Any Shoes	102	**Reading Materials (Adults)**	
Bought Any Watch	102	Bought Any Book	100
Computers (Households)		Read Any Daily Newspaper	103
HH Spent <$500 on Home PC	105	**Cameras & Film (Adults)**	
HH Spent $500-$999 on Home PC	103	Bought Any Camera	101
HH Spent $1000-$1499 on Home PC	100	Bought Film	103

In addition to the findings of this study, other studies suggest that a significant portion of the current retail market area for some downtown retailers extends to the east and south of Columbus. This outcome recognizes the influence of Camp Atterberry to the northwest and regional malls like Greenwood Park and Edinburgh Premium Outlets.



"This trade area delineation is based on a review of actual charge sales transactions at a major retailer and … represents a very reliable determination of its geographic scope." Retail Market Analysis – The Commons Mall, HSG/Rouse Associates

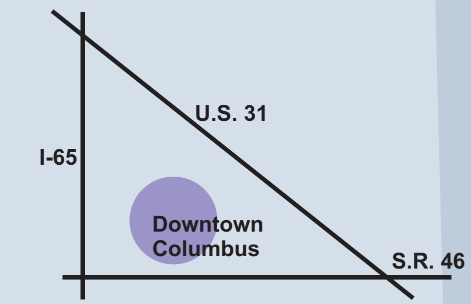
Entertainment

With regard to entertainment, the following table illustrates the entertainment options with the greatest market potential for residents within 15 minutes of downtown which are consistent with the survey results (venue oriented). Again, it should be pointed out that these venues will also attract market share from downtown employees and tourists.

Entertainment (Adults)	MPI
Attended the Movies in Last 6 Months	97
Went to Live Theater	93
Attended a Music Performance	100
Went to a Bar/Night Club	101
Gambled at a Casino	94
Health (Adults)	
Exercised at Home 2+ Times/Week	102

According to these results, the greatest potential venue selections are "Bar/Nightclub" and "music performance". Bar/nightclubs which also provide a venue for live music performance also represent a significant opportunity and improve their probability of success.

Because Columbus is growing, there is potential for Downtown to capture some of the growth. Downtown is in the middle of the major thoroughfare triangle - I-65, SR 46 and US 31.

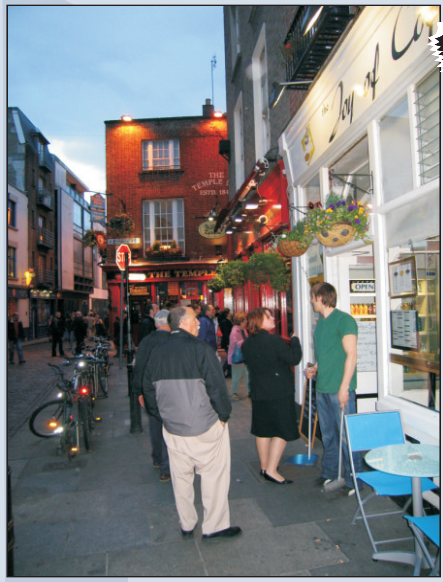


Did you know?

As the new economy continues to grow, technology and Internet use is expected to triple in the next 5 years. These growing businesses demand support and services. Communities should consider what attracts high-tech companies:

- Physical infrastructure that supports data-intensive communications
- Technology workers such as engineers and software programmers
- Local colleges and research labs
- Civic and cultural amenities that attract entrepreneurs and their families
- Financial capital to fund companies and their growth

Buildings that provide space for people to both live and work is becoming popular again throughout the United States. In many cases these live/work buildings include a store or office at street level with residential above or behind, as shown above. These spaces are particularly useful for artisans and craftspeople to create, house and display their work.



Play

Did you know?
Many of the benefits from entertainment, cultural amenities and recreation accrue to local residents, but opportunities for these activities can also attract visitors from outside the Columbus area. Of the 997.6 million person trips taken by U.S. travelers in 2000, 24% (or 239.4 million) visited a museum or attended a cultural event and approximately 33% were for shopping. Other destinations include active streets animated by after-hours shops, restaurants and pubs as demonstrated in the above image.

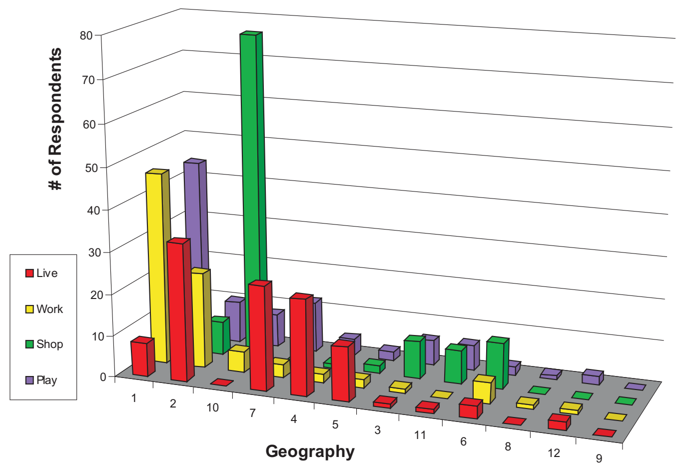
Communities throughout the Midwest are utilizing public art to improve their downtowns. Toledo Ohio's "It's Reigning Frogs" public art campaign featured dozens of fiberglass frogs placed around Downtown sidewalks for residents to view and interact.

Public Process

Overview

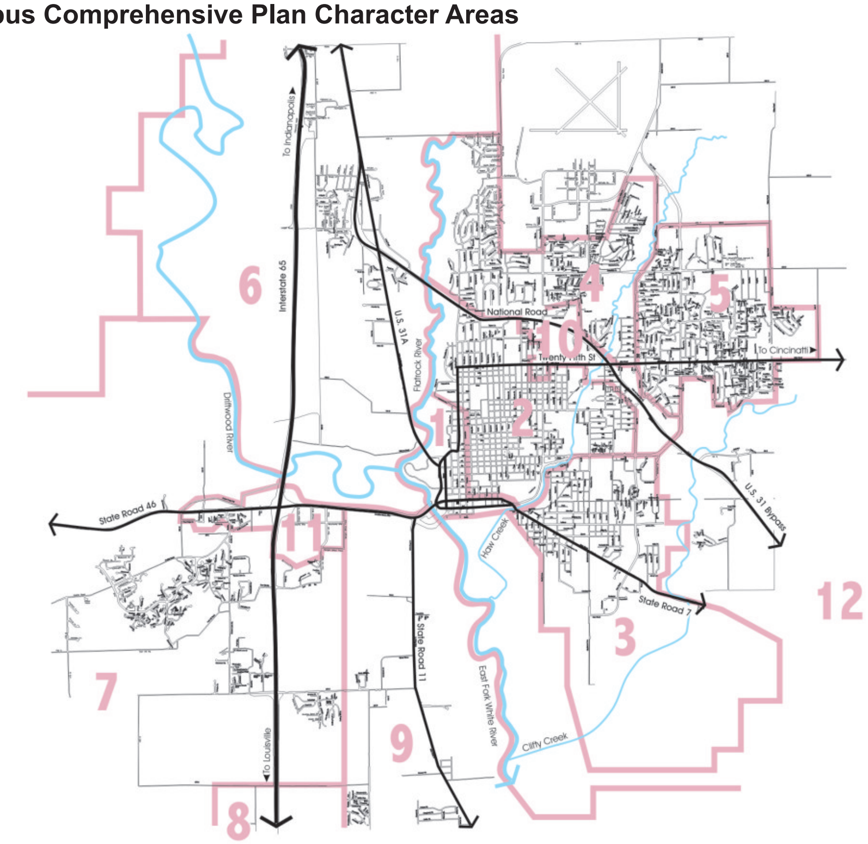
Part of a successful strategic planning effort includes developing an understanding of the community's desires and level of support. This information complements market and physical context data and is critical to the success of the overall plan. For the *Downtown Columbus Strategic Development Plan,* observations, preferences, and ideas were gathered in a variety of forums including; eleven Working Group meetings, four Vision 20/20 Committee meetings, five open houses, four focus groups (Live, Work, Play, and Shop markets), and surveys issued to four cross sections of the community (Community at Large, Downtown Employees, Downtown Businesses and Columbus students). In total, more than five thousand Columbus residents were involved in the planning process in some way. The following diagram illustrates a typical cross section of open house participants based on the Character Areas identified in the Columbus Comprehensive Plan, adopted in June of 2002.

Where do you Live, Work Shop and Play?



1. Downtown Columbus
2. Columbus Central Neighborhoods
3. East Columbus
4. Western Rockyford Neighborhoods
5. East 25th Street Neighborhoods
6. Indianapolis Road
7. Western Hills
8. Woodside/Walesboro Area
9. State Road 11 South
10. National Road Commercial Corridor
11. Western Gateway Area
12. Eastern Rural Area

Columbus Comprehensive Plan Character Areas



Overall Public Process Findings

Key public process components included gathering input and data from:

- Approximately 350 participants at five open houses;
- 30 focus group participants addressing the four key markets (residential, employment, retail, and entertainment);
- Four surveys reaching over 5,000 residents or business owners; and
- Discussions with 50 key community stakeholders.

Key findings from public process activities include:

- **A segment of the market desires to live Downtown** (possibly 5-10% of the new home market), but they are looking for quality housing that meets their needs in clean, safe and friendly neighborhoods with updated infrastructure (i.e. sewer, water, and parking). They also want access to basic retail services nearby.

"In total, more than five thousand Columbus residents were involved in the planning process in some way."

- **Downtown employs 2,900 people** in predominately governmental, service and corporate businesses. Competition for service sector and corporate employment centers is strong within and outside of the local market. Other competition includes newer suburban developments that offer inexpensive land, with ample low cost parking, and fewer existing constraints.

- **Arts and culture has a significant following in Columbus.** The Columbus Indiana Philharmonic, which performs at venues in the downtown as well as elsewhere in the community, has 650 season ticket holders and sells out many of its performances. The Arts Council's programs at the Commons are well attended and include a wide variety of entertainment. The Crump Theater, with limited resources, successfully held 35 events with a total attendance of 3,000 in the last year.

- **Traffic generators are an important component of Downtown's market.** This includes Ethnic Expo (40,000 over 2 days); the Labor Day weekend Hospice benefit concert (20,000 in a day); Gospel Festival (22,000 over 3 days); PopFest (8,000 in a day); and NeighborFest (40,000 in August). Other attractions include the Mill Race Arts Council Events (35,000 per year); Commons Arts Council Events (55,000 per year); churches (6,700 total memberships near downtown); Columbus Museum of Art and Design (5,000 in 241 days) and the kidscommons (12,000 per year).

- **Youth/amateur sports events are a rapidly growing segment of the visitor market for the city.** Participants in these events (over 5,500 competitors and their families in 2004) are often housed out of town and do not frequent Downtown unless an event is hosted there for them.

Dell Brothers located near the intersection of Fourth and Washington Streets is an independent retailer in Downtown Columbus that offers men's clothing.

- Downtown independent retailers compete for market share with franchise and big "box retail" trends. **Offering more niche oriented goods and services, downtown businesses tend to serve a broad regional and visitor customer base** in addition to local markets --15-30% for retail goods and up to 40% for dining.

Elements of a Healthy Downtown

The 32 "Elements of a Healthy Downtown" (one method of measurement created by the consulting team) are the basic components necessary for a downtown "to work." The inclusion of these components ensure an operational downtown, providing the foundation for types of investment and development necessary to make a unique and special downtown. The "Elements of a Healthy Downtown" are divided into the four categories of Leadership, Economic Development, Urban Design, and Programming. Downtown Columbus' "Elements" were evaluated by a variety of community forums throughout the planning process. Columbus residents attending these forums concluded that Downtown currently excels in the areas of Landmarks, Preservation and Adaptive Reuse, Parks & Recreation, Civic/Public Buildings and Security; however, it is deficient in the areas of Parking, Defined Districts, Street-Level Retail, Economic Development Tools, Residential Base, Ethnic Themes/Diversity, Hospitality Area and Coordinated Marketing. These deficiencies must be addressed before downtown can prosper.

Elements of a Healthy Downtown

Leadership

Element	Grade
Coordinated Marketing	—
Promotions	✓-
Plan for the Future	✓
Security	+
Management	✓
Leadership Grade	✓

Programming

Element	Grade
Transit System	✓
Street-Level Retail	✓
Arts & Culture	✓
Entertainment	✓
Parks & Recreation	+
Residential Base	—
Urban Neighborhoods	✓
Ethnic Themes & Diversity	—
Hospitality Area	—
Civic/Public Buildings	+
Destination Places	✓
Programming Grade	✓

Urban Design

Element	Grade
Landmarks	+
Pedestrian Orientation & Scale	✓
Historic Fabric	✓
Sense of Place	✓
Open/Public Space	✓
Strong Linkages	✓
Gateways	✓
Defined Districts	—
Preservation & Adaptive Reuse	+
Parking	✓-
Understandable Traffic Network	✓
Urban Design Grade	✓

Economic Development

Element	Grade
Opportunities for Growth & Development	✓
Market Potential	✓
Activity Centers	✓
Public/Private Agenda	✓
Economic Development Tools	—
Economic Development Grade	✓

+ Dominant	✓+ Somewhat Dominant	✓ Apparent	✓- Somewhat Apparent	— Not apparent

This evaluation of Downtown Columbus' current status as measured by the Elements of a Healthy Downtown are substantiated by site analyses and market research. The Elements of a Healthy Downtown is a measuring tool used to establish a baseline of fundamentals needed to ensure an economically and socially viable downtown.

Community Surveys

All of the five survey groups (Community at Large, Downtown Employees, Downtown Businesses, and Columbus students) were asked questions from the following categories;

- Base line demographic data relevant to evaluating the profile of respondents for each cross section of the community.
- General questions principally about how well downtown serves the needs of either the respondents or their customers.
- Market specific questions addressing preferences, observations, and ideas concerning four market profiles: living, working, playing, and shopping in Downtown.

Overall response rate provided a sound statistical basis for determining community concerns, expectations, and interest in Downtown changes. In particular, the number of Community At Large respondents indicates a very strong interest by the citizenry of Columbus in the Downtown.

Community Survey Summary

Most Frequent Survey Comments

1. Parking, parking, parking… the majority of comments were about parking concerns.
2. Desire for retail specialty shops focusing on niche markets including lifestyle, children's, and gifts.
3. Desire for more entertainment choices especially non-programmed opportunities such as live music, kidscommons, and active sports/recreation (possibly along river).
4. Desire for more dining choices including family oriented gathering spots, and signature foods.

Survey - Findings from Questions

General

1. Most respondents find downtown shopping to be unsatisfactory and think it should be improved.
2. The majority of respondents, 60% to 88% (depending upon the survey audience), agree that Downtown parking has a reputation for being difficult in prime parking areas and times.
3. In general about 10- 20% of the respondents did not know what rating they would give Downtown as a place to Live, suggesting some lack of awareness of the benefits downtown offers for this market.
4. Most respondents travel to downtown destinations 1-5 times per month, with the 6-10 times or greater being significantly less frequent.
5. About 11% of the Employee respondents live outside of the two Columbus zip codes, while 11% (versus 5% of the Community respondents) live downtown.

Living

6. Most respondents own their own home and have lived in Columbus for 15 years or more.
7. About 94% of respondents live in single-family homes and of those who plan to move, 89% want to live in a single-family house and 10% indicated they would prefer to live in multi-family units or townhouses.
8. About 8.5% of the respondents would consider living downtown if their preference was available. The majority of these respondents were early career adults (19-35 years of age) or late career and older (55+ years of age). "Neighborhood" ranked significantly higher amongst community respondents than other factors when selecting where to live. It was followed by housing type, schools, and property values, in that order.

Working

9. Generally 95% of the respondents who work downtown drive to work.
10. One fifth or 20% of the respondents who work, work downtown, with students being the notable exception (less than 4%).
11. More than a quarter of the respondents (25 - 30% depending on the survey) would consider working downtown. Of these respondents, as much as 70% of the respondents are either early career (25-64 years of age) or late career (55-64 years of age) adults.
12. A third of respondents eat downtown 1-2 times per month. More than 70% of the Community Survey respondents work outside of downtown. Approximately half of the Employee Survey respondents eat in a restaurant, while two thirds spend $25 or less per week or go home for lunch.

Making Downtown Special...

The following were chosen by Columbus residents as the most appropriate words for distinguishing Downtown's desired regional image from other communities:

- Friendly
- Safe
- Cultural
- Vibrant
- Active
- Memorable

Most Important For Success...

The following were determined by residents to be the most important uses for Downtown Columbus to be successful within its region:

- Entertainment, food
- Entertainment, culture
- Parking
- Retail, convenience and personal services
- Retail, specialty
- Multi-family housing
- Recreation, active
- Convention and tourism

The pedestrian-friendly downtown core is centered around Washington Street — a "Main Street" with small offices and ancillary businesses, banks and restaurants. Pedestrian-friendly Washington Street is one of many aspects that makes Downtown Columbus memorable.

Columbus residents answer questions about downtown development during the April open house.




> **In addition to creating more lively and interesting places to live and shop, main street … projects are beginning to attract a variety of employers, ranging from small … to large world headquarters…**
> -ULI - Shopping Center Development Handbook

Plan recommendations were well-received by participants at the April open house.

Simple streetscape elements help establish an identity or sense of place in Downtown Columbus.

Play

13. While most people come to downtown for festivals, the majority go elsewhere for entertainment.
14. Respondents would frequent downtown more often for fine dining, casual dining (table service), performing arts, and special interest shops.
15. Most respondents spend $100 or less per week on food away from home.
16. It is most convenient for respondents to eat downtown in the evening and on weekends.

Shop

17. Respondents were equally divided between day, evening, and weekends as the most convenient time for shopping.
18. Downtown ranked lowest as a place to shop with Fair Oaks Mall, Clifty Crossing, Columbus Center, and Edinburgh Premium Outlets ranking the highest in that order.
19. Respondents generally seem satisfied with Downtown, though hours, merchandise selection, and price trended towards lesser responses.
20. Furniture, jewelry, banking, specialty retail, and professional service ranked highest amongst market areas selected for Downtown.
21. Apparel, specialty retail, furniture/decorations and housewares would tend to bring more people downtown to shop.

Destinations

Downtowns attract people for a variety of reasons including government and private services, employment, recreation, socialization and entertainment. A mix of various types and uses of destinations is what makes a downtown healthy and vibrant. The following top twelve destinations in Downtown Columbus were ranked by users, employees and leaders:

Top 12 Downtown Destinations by Resident Group

	Community	Employees	V 20/20
Church	**1**	**2**	**4**
Bank	**2**	**1**	**5**
Post office	**3**	6	9
City hall/Courthouse	**4**	**3**	**2**
Parks	**5**	10	8
Kidscommons	6	11	7
Entertainment	7	8	6
Library	8	9	10
Shopping	9	7	12
Professional services	10	**4**	**1**
Childrens museum	11	12	11
Visitors center/Arch. landmarks	12	**5**	**3**

Numbers in bold indicate the top five ranked downtown destinations

Taking Stock of the Community – Findings

The following findings summarizes the physical, market and community analysis of Downtown Columbus. The findings synthesize the bulk of the analysis into a series of main points organized by the four market categories Live, Work, Shop and Play. The findings were affirmed by the Working Group, focus groups and the Vision 20/20 Downtown Committee.

Live

- Housing should provide local market for downtown by serving key segments.
- Establish linkages with neighborhoods so there is synergy with downtown.
- Create new urban housing product focused on market-rate segment.
- Provide quality housing in and around downtown.

Work

- Downtown has a strong business base, including large and small ventures, but needs to increase support for downtown entrepreneurs.
- Many downtown employees leave after work, living, shopping, and playing elsewhere.
- Some downtown employees do not shop or lunch in the ½ mile trade area.
- An education anchor would extend "work day" activity and serve workforce needs.

Play

- No "critical mass" of entertainment in downtown.
- Mostly passive recreation options
- Entertainment is heavily weighted towards food with limited alternate offerings.
- A new role for downtown is niche entertainment… missing in Columbus.
- Downtown play does not offer "something for everyone" living in Columbus.

Shop

- Retail competition outside of downtown has increased for customers living in downtown in the last five years.
- Downtown retail offers few goods for local residents and visitors to Columbus.
- Downtown storefront space is not configured to leverage and activate retail.
- The range of retail offerings in the downtown is limited.

[1] U.S. Census 2000.
[2] Richard Florida, "The Rise of the Creative Class: and how it's transforming work, leisure, community and everyday life", Basic Books, 2002.
[3] Bridget Lane, Consultant, Business Developments, Inc. Chicago, Illinois