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## Downtown Market Study: City of Olmsted Falls, Ohio

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# DOWNTOWN MARKET STUDY

CITY OF OLMSTED FALLS, OHIO



CSU Center for Community Planning and Development  
June 30, 2014

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## EXECUTIVE SUMMARY

### Introduction

As the first step in establishing an economic development committee under a new mayoral administration, the City of Olmsted Falls worked with the Center for Community Planning and Development at the Levin College of Urban Affairs, Cleveland State University, to prepare an analysis of market strengths and weaknesses for retail, office, housing and lodging in the City's historic downtown area. This study was performed by economic development student Kirby Date, who is also a professional planner and coordinator of the Community Planning Program at the Levin College. In addition to the market study, a downtown survey of visitors and residents, an online survey of merchants, and merchant interviews, were conducted. Meetings were held with a Market Study Committee, a subgroup of the new Economic Development Committee, to review and discuss findings at key points throughout the study.

It is important to note that while standard retail was evaluated, the focus of this study is on defining specific retail, office and lodging niches typical of small towns and main streets. The emphasis is on local ownership, management and service, and the role that local businesses can play in downtown economic development.

### The City of Olmsted Falls

The City of Olmsted Falls is an historic Ohio town, an oasis in the sprawling western suburbs of Cuyahoga County. Settled in 1814 at the confluence of Plum Creek and the West Branch of the Rocky River, it was named after Charles Olmstead in 1829, in exchange for the acquisition of his personal library, which became one of the first libraries in Ohio. While the surrounding cities of North Olmsted, Strongsville, Berea and North Ridgeville have developed extensively with many acres of commercial and residential development, Olmsted Falls remains a small-scale suburban community, with a historic district containing many restored homes, churches and commercial structures, and residential neighborhoods within extensive wooded areas. Among the city's assets are cascading sets of waterfalls that run down both Plum Creek and the Rocky River, right adjacent to the City's downtown.

The Olmsted Falls City School District serves 3500 children at the "Excellent with Distinction" level, as designated by the State. Most new homebuyers in the City are either existing families who are moving up while staying in the school district, or families moving from outside the district, attracted by the schools. The majority of residents report that their main attraction to the downtown is its "quaint, small town feeling". The community is extremely stable, with many residents reporting that they intend to stay in the community for more than 10 years.

## Market Analysis Findings

**Destination Draws.** Olmsted Falls has many amenities that draw visitors and residents, and that could do so in an expanded capacity with enhancement over time. They include frontage on the Rocky River, the Falls on the river and Plum Creek, a park at the confluence of the creek and river, and an historic covered bridge.

The Grand Pacific Junction historic retail area contains many buildings which have been well-restored, and are an attraction all by themselves. Creating a walkable shopping area with unique businesses, this area offers much opportunity for continued and expanded visitor attraction.

In addition, the City is home to many other amenities and potential partnerships which could create increased visitor demand over the long run:

- A historic train depot, and several key areas which are attractions for train enthusiasts around the region, who come to view the 120 Norfolk and Southern trains which cross through the downtown every day
- A wedding venue with a chapel, wedding gardens, and historic hotel for receptions, supported by a bridal shop, florist, and beauty salon
- Baldwin Wallace University, with its nationally ranked music and musical theater programs attracting many visitors from out of state, is within 3 miles
- The Cleveland Metroparks has designated a strategic trail connection to Olmsted Falls' downtown in its Centennial Emerald Necklace Plan, with connections to the Rocky River Reservation, and ultimately to Lake Erie
- The popular Olmsted Performing Arts Association has recently expanded into a new community theater facility just one mile north of town, which could likely generate visitors for restaurants and before- and after-theater gatherings.

**Retail and Office.** The retail and office market analysis contained in this report demonstrates that in spite of a saturated regional retail and office market, there remains a thriving market for specialty retail and small-scale professional office within historic downtowns across Northeast Ohio. Demand for a modest increase in specialty retail and office is indicated for the City's downtown.

**Lodging.** This report also demonstrates that successful Bed and Breakfasts are located in historic downtowns, and in fact, Olmsted Falls is one of the few in the area that lacks a Bed and Breakfast lodging opportunity. In addition, there are only 7 Bed and Breakfast rooms within 15 miles of the downtown district, including only 4 in Berea, home to Baldwin Wallace University. There should be a market for Bed and Breakfast rooms in the downtown in the longterm future.

**Housing.** The housing analysis demonstrates that while mid-level housing is well provided for in the housing market area (44138 zip code, consisting of both the City of Olmsted Falls, and Olmsted Township), higher-price-range housing is in shorter supply. In addition, there

are some potential gaps in lower-priced housing. Given the increasing interest of young professionals in walkable neighborhoods with unique local/historic settings, and in small towns with excellent schools as they begin their families, the City could position itself to take advantage of this market through enhancement of the historic downtown as a walkable residential neighborhood with local business amenities.

**Business Environment Challenges.** The greatest challenges related to enhancement of the downtown are:

- A shortage in supply of liquor licenses
- Traffic counts on the low side on Columbia Road, which may be partly influenced by delays due to train crossings
- As-of-yet lack of critical mass in activities in the downtown that would draw people for a “day trip” as a destination
- Not-yet-coherent downtown image and visibility related to lack of visual awareness of downtown businesses, and good pedestrian access throughout the downtown area.

These challenges, and potential solutions, are discussed in detail in the report, and provide opportunities and projects for the Economic Development Committee’s work going forward.

## Recommendations

As a result of the market analysis and preliminary study of the downtown, the following key recommendations are made. They are not made in any particular order; they should be prioritized by the City Economic Development Committee as part of their work and collaboration with property owners and the merchants’ association. See the discussion later in the report for more information.

- *Continue to convene an economic development committee* made up of private and public partners to pursue projects to enhance the downtown business environment and visitor draw
- *Work with the Cleveland Metroparks* on long-term plans for a trail link connecting the Olmsted Falls downtown, Mill Creek reservation, and/or Rocky River Reservation
- *Develop an urban design plan* for the downtown that can address downtown identity and vibrant sense of place, and the need for coherent pedestrian flow and walkability, visitor attraction and accommodation, retail visibility and signage, pedestrian and traffic safety
- *Work on solutions to address limited liquor license capacity* to support restaurants
- *Enhance bicycle and pedestrian connections* between residential neighborhoods and the downtown, and especially Baldwin-Wallace college

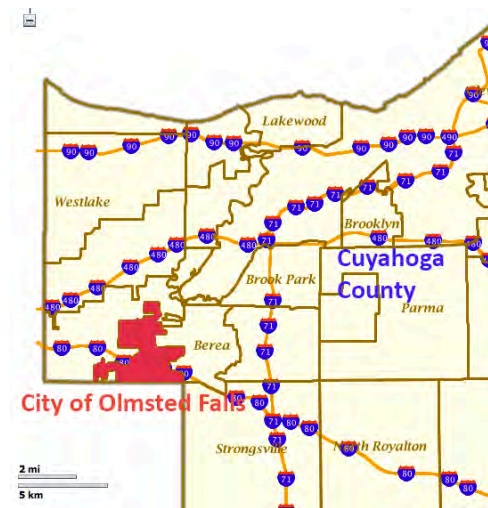
- Explore long term opportunities to *develop a venue that could attract train enthusiasts*, perhaps utilizing the depot as a centerpoint
- Explore opportunities for *modest expansion in retail and office capacity* downtown
- Explore opportunities to *integrate overnight lodging* into the downtown over the long term
- In conjunction with the merchants' association, work to *enhance the business environment and increase shopper traffic* by addressing common Main Street issues such as marketing/branding, advertising, coordinated hours and business guidelines, business retention, diversity of business types, filling vacancies, and coordinated events
- Continue to *focus on local, unique businesses* and property owners as the centerpoint of economic development strategy
- Seek and support *opportunities for new and redeveloped housing, and enhancement of existing neighborhoods* in the downtown vicinity. Take advantages of opportunities to meet a higher-end market, and/or provide walkable neighborhood living for new millennial families



# INTRODUCTION AND BACKGROUND

## The City of Olmsted Falls

The City of Olmsted Falls is an historic Ohio town, an oasis in the sprawling western suburbs of Cuyahoga County. Settled in 1814 at the confluence of Plum Creek and the West Branch of the Rocky River, it was named after Charles Olmstead in 1829, in exchange for the acquisition of his personal library, which became one of the first libraries in Ohio. While the surrounding cities of North Olmsted, Strongsville, Berea and North Ridgeville have developed extensively with many acres of commercial and residential development, Olmsted Falls remains a small-scale suburban community, with a historic district containing many restored homes, churches and commercial structures, and residential neighborhoods within extensive wooded areas. Among the city's assets are cascading sets of falls that run down both Plum Creek and the Rocky River, right through the City's downtown.



### City Location Map

Source: Cuyahoga County Auditor, CSU CCPD

The City also retains its original train depot in good condition. Located within the downtown, this presents an opportunity to attract visitors in the long run. The Norfolk and Southern railroad main line runs through the downtown, with up to 120 trains per day passing at the at-grade Columbia Road crossing. While at first blush this may seem like a liability, the quietness of the town and the availability of gathering places and parking near the depot and crossings have

made this something of a focal point for train buffs seeking a chance to observe railroad activity. In addition to passenger trains, and freight trains carrying goods of all sorts, historic events occur annually, such as restored passenger trains and steam locomotives making their way through the downtown as part of commemorative historic trips from Chicago to Philadelphia.

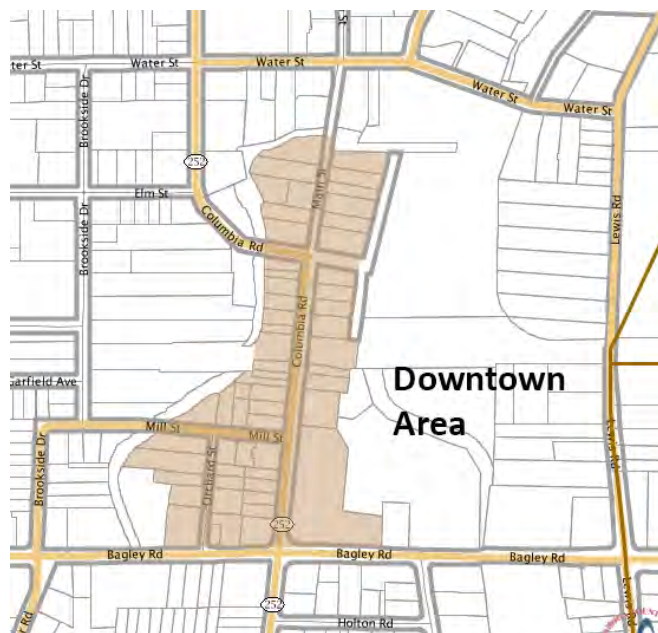


The City's school district, which covers the area of the City of Olmsted Falls as well as Olmsted Township, is rated "Excellent With Distinction" by the Ohio Department of Education. According to local realtors, half of new homebuyers in the City are families moving up within the school district, in order to stay in this location; another 40% are families with schoolchildren moving into Olmsted Falls in order to take advantage of the school district. The final 10% are seniors from elsewhere who are attracted to decent, affordable housing options, and empty nesters who are downsizing but want to stay in the community.

The community is extremely stable, with the majority of resident respondents to the Downtown Survey stating that they intended to live in the City for longer than 10 years. Many families move back here because one or more members grew up here. The City retains its personal, small town atmosphere with the majority of survey respondents quoting the best thing about Olmsted Falls as its "quaint small town feeling". Half of nonresident respondents stated that they would consider living here.

### Downtown Businesses

The Olmsted Falls Downtown Area runs on the east and west sides of Columbia Road, north of Bagley Road, extending north along Main Street, ending at the covered bridge over Plum Creek. It includes the Grand Pacific Junction historic shopping area, which also includes properties along Mill and Orchard Streets. Also included are a strip shopping center on the east side of Columbia at Bagley. A few residences are scattered among the businesses, many of which are located in renovated historic homes. See the Downtown Area map.



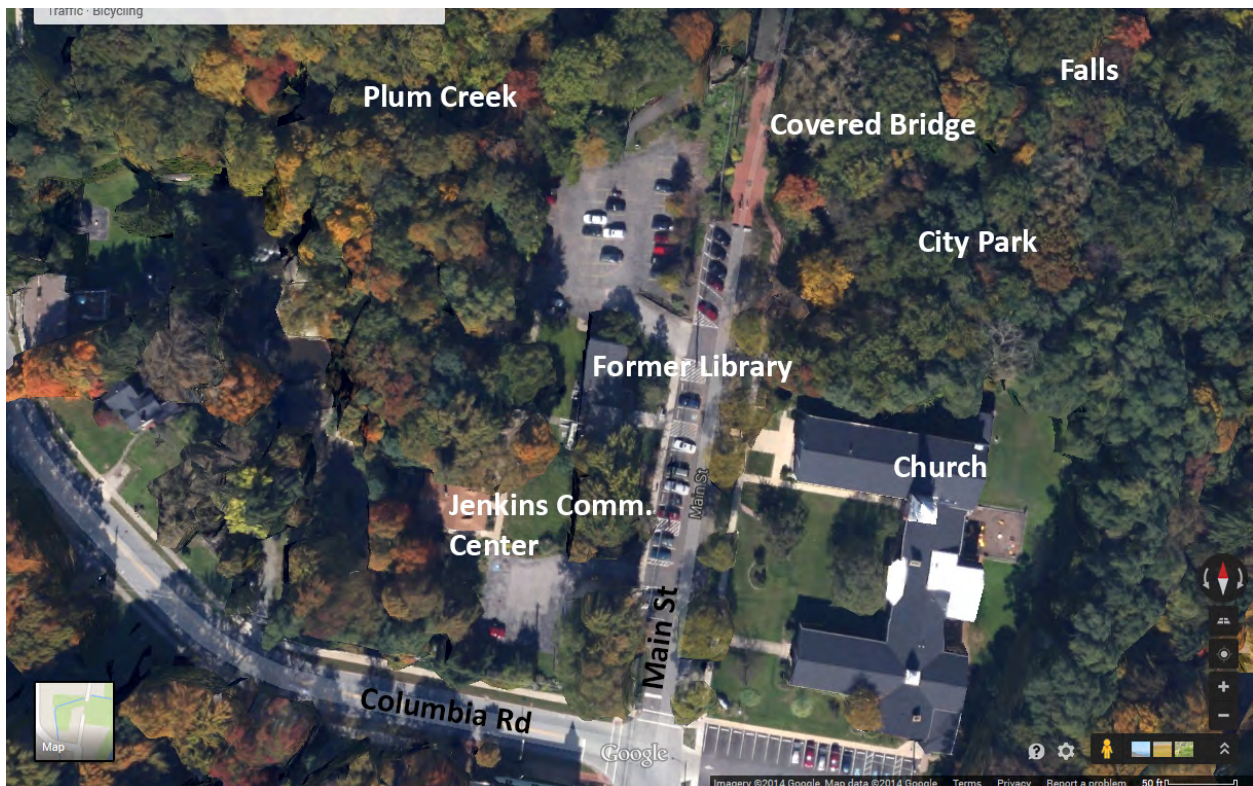
### Olmsted Falls Downtown Area

Source: Cuyahoga County GIS, CSU CCPD

There are approximately 135,500 square feet of retail and professional office space in the downtown area, including some second floors, but primarily first-floor space. The vacancy rate at the time of this report is excellent, at 2%. See the Business Inventory in the Appendix.

It should be noted that properties on Main Street at the north of the Downtown Area are currently used for community facilities – a church, community center, community park, and vacant former library building – and are not included in the inventory totals.

The City's downtown in general is somewhat underutilized. While regional-drawing specialty shops pull a customer base that is 45% within the immediate zip code, with another 50% hailing from a wide range of zip codes all over northeast Ohio, pedestrian traffic is low except at certain peak times and events. Some of the specialty shops have a core of long-time businesses, but other shops turn over regularly. Merchants would like to see more shopper traffic. Anecdotally, it appears that many Northeast Ohio residents, including those that visit the historic shopping area, are unaware that the Falls exist, just a block beyond the current shopping area. This project was initiated in part to examine the assets of the downtown from a retail business standpoint, and to evaluate ways to enhance the downtown business environment.



### **Downtown Businesses – Main St and Columbia Rd**

*Source: Google Maps and CSU CCPD*





**Downtown Businesses – Main Street south to Railroad**

Source: Google Maps and CSU CCPD



**Downtown Businesses – Railroad south to Mill Street**

Source: Google Maps and CSU CCPD





**Downtown Businesses – Mill Street south to Bagley Rd**

*Source: Google Maps and CSU CCPD*



**Downtown Businesses – Bagley west of Columbia Rd**

*Source: Google Maps, CSU CCPD*



## Project Process

This project was done as part of a consulting project to the City of Olmsted Falls, to assist the City with evaluating possible uses for a key site in their downtown, and to make recommendations about enhancing the downtown economic environment. The student planner worked with the newly elected Mayor, Ann Marie Donegan, the economic development director, Rosann Jones, and members of the newly formed Economic Development Committee in three meetings to present information and discuss its implications and recommendations.

In addition to the market analysis described later in this report, reconnaissance for the project included online and paper surveys of downtown visitors and City residents; an online survey of downtown merchants; and personal and telephone interviews of twelve merchants and realtors. Informal conversations with Cuyahoga County and Cleveland Metroparks planners were also included. See the appendices for more information.

## View of the Covered Bridge from City Park

*Source: City of Olmsted Falls*



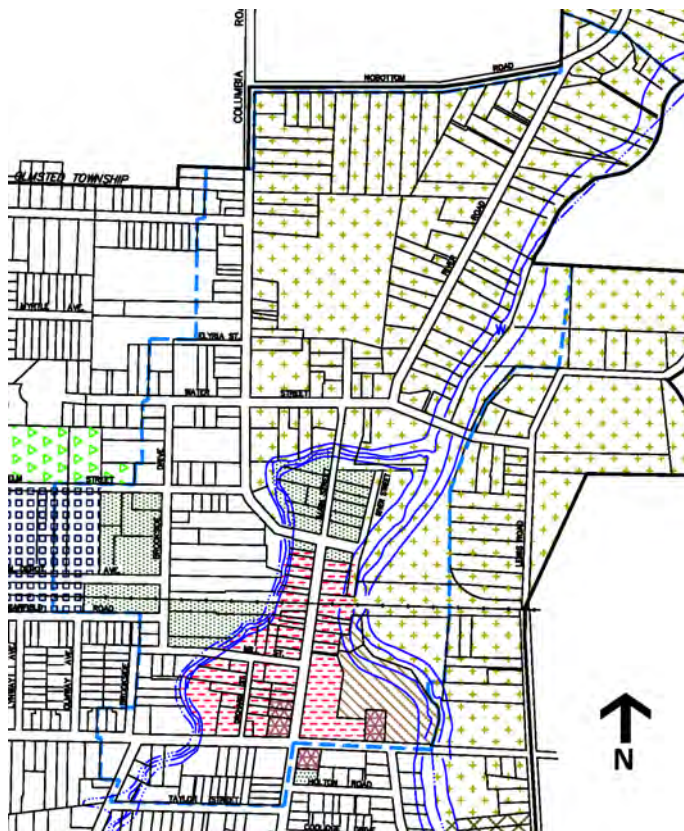


## Downtown Market Conditions

**Current zoning.** The current zoning for the downtown ranges from C-3 Community Commercial, to P-1 Professional/Medical, to C-2 General Commercial.

Some downtown proposals for new retail, office and lodging uses, if in the C-2 or P-1 areas now, will likely require re-zoning to a district more appropriate to the intended uses, most likely “C-3, Community Commercial District,” which is intended “to enhance the Village Center character of Olmsted Falls”. Professional offices, retail establishments, restaurants, and parking are all permitted uses in this district. Bed and Breakfasts, and restaurants with outdoor seating, would be conditional uses.

















Current housing districts in the downtown area include D-2 and D-3 single family districts, (20,000 square foot and 12,000 square foot lots respectively) and one D-5 multi-family district area at Bagley Road and the Rocky River. The D-4 district, “single family attached”, actually permits both attached and detached single family dwelling units at an overall density of 4.8 units per acre. While there are no D-4 areas in the downtown at the present time, this density approaches what is typical for compact development walkable neighborhoods (6-8 units per acre typically), and may be useful to the City in the future in the downtown area.



**Downtown Zoning Map showing extent of historic district**

Source: City of Olmsted Falls



<b>LEGEND</b>	
<b>RESIDENTIAL</b>	
	D-1 SUBURBAN DWELLING DISTRICT
	D-2 SINGLE-FAMILY DWELLING DISTRICT
	D-3 SINGLE-FAMILY DWELLING DISTRICT
	D-4 SINGLE-FAMILY ATTACHED DWELLING DISTRICT
	D-5 MULTI-FAMILY DWELLING DISTRICT
<b>MOBILE HOME</b>	
	D-6 MOBILE HOME DWELLING DISTRICT
<b>PROFESSIONAL</b>	
	P-1 PROFESSIONAL AND MEDICAL DISTRICT
	P-2 PROFESSIONAL OFFICE/MULTI-FAMILY DISTRICT
<b>SUPPLEMENTAL DISTRICTS</b>	
	WATERWAY CONSERVATION DISTRICT
	HISTORIC AREA CONSERVATION DISTRICT 1995
<b>COMMERCIAL</b>	
	C-1 CONVENIENCE COMMERCIAL DISTRICT
	C-2 GENERAL COMMERCIAL DISTRICT
	C-3 COMMUNITY COMMERCIAL DISTRICT
<b>MIXED USE</b>	
	MUPD MIXED USE PLANNED DEVELOPMENT DISTRICT
<b>INDUSTRIAL</b>	
	I-1 ADMINISTRATIVE OFFICES, INDUSTRIAL RESEARCH, AND SPECIAL NONMANUFACTURING DISTRICT
	I-2 INDUSTRIAL MANUFACTURING DISTRICT

**Local Historic District.** The downtown also contains a local Historic Conservation District, an “H” zoning overlay which carries special requirements *in addition* to the underlying zoning. See the Zoning Map. Requirements for this district include the obtaining of a Certificate of Appropriateness for existing building alterations, and any new construction. Plans and proposals need to be reviewed by the City Planning Commission, the City Building Administrator, and the Ohio Historic Preservation Office. Proposals for development must be historically compatible in accordance with these requirements.



**Grand Pacific Junction, Columbia Rd**

Source: City of Olmsted Falls

**National Historic District.** The downtown also contains a National Register Historic District, with many buildings listed as contributing buildings. This area is not shown on the Zoning Map. Requirements for design, construction and alteration apply only when federal

or state funds are involved, including Historic Preservation Tax Credits. Where federal and state funds are not intended to be utilized, this listing is less restrictive than the local Historic Conservation District.

**Stream Setback.** The City has a riparian setback zone along Plum Creek, which prohibits development within a designated zone of 75 feet from the ordinary high water mark, or the 1% annual floodplain, whichever is wider.

**Floodplain.** As shown on the floodplain map, parts of the downtown along Plum Creek and the Rocky River are contained within a flood hazard zone. Downtown area properties along the west side of Orchard Street are the most significantly affected. However, it should be noted that flooding can also extend beyond a FEMA designated zone.



### Downtown Flood Hazard Area

Source: Cuyahoga County Auditor GIS web site



### Outdoor Restaurant Dining, Moosehead Restaurant, Facing Rocky River

Source: City of Olmsted Falls

**Liquor Licenses.** The Ohio Board of Liquor Control restricts the number of liquor licenses available for use based on community population. Liquor licenses are classified into different categories based on the type of sale

(carryout vs. consume on premises), type of liquor (wine, beer and/or “spirits”), and the hours of sale (up to 1 or 2 am). Due to the community’s small size, liquor licenses in Olmsted Falls are in very short supply. Currently, 9 of 18 “carryout” (C) licenses are available; and 0 of 15 coveted D1, D2 and D5 licenses. (consume on premises). 2 of 5 D3 licenses are available (“spirits” only); and 5 of 5 D4 licenses are available (restricted club memberships). Several of the existing licenses are currently held by active restaurants at full capacity; however some are held by catering businesses which do not use them to their full capacity. Some businesses hold multiple licenses.

Unfortunately, Olmsted Falls does not meet criteria to be eligible for programs available for revitalization and entertainment districts in rural and urban areas, respectively. Its suburban location in an urban county puts it at a disadvantage. The City is aware of this issue, and the economic development committee intends to target the issue as a specific focus in the near future. There are several options for the City to pursue:

- Transfer existing licenses by moving existing licensed businesses into new locations
- Purchase surplus license(s) from another city with more population
- Explore shared facilities/licenses with existing businesses which do not currently use their full capacity
- Establish a “BYOB” policy, and meet conditions in site design and program; one option is for a local merchant who holds a C license, with “tasting” permit, to provide an easy way for people to purchase wine for consumption at BYOB restaurants
- Explore possible flexibility/applicability of available D3 licenses as appropriate for the site (spirits, or wine only “grandfathered”).

**Utilities.** All utilities, including centralized sewer, water, electric and gas, are readily available in the downtown.

**Access and Visibility.** The downtown is easily accessed on Columbia Road from I-480 to the north. It is only about 6 minutes’ drive from the freeway interchange. Many sites in the downtown are highly visible from Columbia Road. However, those in the rear area of some sites (Grand Pacific Junction) are less visible from Columbia Road. Coming south from the freeway, glimpses of the falls and historic buildings across the creek encourage the viewer to be aware of the downtown and its assets.

**Multi-Modal Traffic .** Auto and truck traffic on Columbia Road is about 6300 vehicles per day (ADT)(NOACA 2013). This is seen as within the range for small Ohio main street towns, if on the low side. (6-9000 ADT). Delays at the train crossing may be discouraging more traffic flow.

Public transit does not exist in the downtown at the present time. A former RTA bus route down Columbia Road was removed in 2009 (confirm). In the long run, public transit connections to the Metroparks, shopping in North Olmsted, Baldwin Wallace College, and connections to transit leading to downtown Cleveland and key job centers, could be desirable and help to attract young professional families to Olmsted Falls.

Bicycle access is difficult and extremely limited at the current time. Shoulders on Columbia Road are narrow, and there are no connections to Baldwin Wallace College, the Metroparks, and other local amenities. Recent studies show that women, families and children, in particular, are unlikely to use their bicycles for navigating their neighborhoods when clearly delineated bike lanes are not present. Separated lanes are ideal when possible.

Pedestrian access has been a characteristic of Olmsted Falls in past years, due to its small scale neighborhood layout immediately surrounding the downtown, good sidewalks, and until recently, the presence of a library in the downtown. Residents offered anecdotes about “people walking with books to the library” in the past. It will be important for the City to place a priority on continued pedestrian access, and take advantage of opportunities to enhance it, when possible.

## Stakeholders

The following is a brief assessment of stakeholders whose input will be important in future efforts to enhance the downtown and its amenities.

**Residents.** This market study is not a comprehensive plan, and resident input was limited to the downtown survey. Proposals for downtown development and enhancement may have an impact on community character, resident use of familiar sites, traffic, parking, and amenities. It is highly recommended that the City pursue a charrette process with the community to understand and develop the vision for the downtown and its best uses, as well as ways to enhance the downtown pedestrian and bicycle environment. This would also give merchants and property owners an opportunity to participate in planning for the downtown.

**Commercial Property Owners and Merchants.** The local merchant and business community participated actively in the Economic Development Committee, the merchants survey, and interviews. About 100,000 square feet of commercial retail and consumer service offices are located in the downtown. Ownership of the majority of properties for specialty retail in the town lies with one owner, who has put significant effort and attention over many years to historic preservation and restoration of buildings, particularly in the Grand Pacific Junction shopping district. Across Columbia Road, a standard strip shopping center of about 55,000 square feet, containing a drug mart, restaurants and pizza shop, chiropractic office, and others, is under new ownership. This property provides a major parking opportunity for the downtown, and backs up to the Rocky River, indicating potential for prime riverfront access in the long term.

While most of the retail establishments are small “specialty” enterprises with one or two owners, many of the merchants are business savvy individuals who have long term operations, plan ahead and have capital reserves, know their customer base well, and would favor enhancement of their customer and marketing environment. Some merchants are less experienced, and there are some typical main street challenges with lack of capital,



high turnover, less desirable hours of operation, and very low profit margins. The merchant's association is growing and becoming more active, and coordinates annual events that are highly successful, drawing people from a wide area. There are a few highly successful restaurants that draw a big crowd, particularly on weekends, and in the summer where outdoor dining is possible. All merchants are seen as supportive in general of efforts to attract new business, although there may be concerns about adding to customer activity while parking capacity expansion is limited.

**Additional market factors influencing the downtown.** Additional stakeholders who provide potential for partnerships for the City in the long run include the Cleveland Metroparks, which includes a trail connection along the Rocky River into the downtown in its strategic plan, and Baldwin Wallace University, 3 miles away, which has two nationally known programs that regularly draw visitors to the area from across the country. The Grand Pacific Junction shops have become something of a wedding attraction, with three venues (the Grand Pacific Hotel, Wedding Chapel, and Wedding Gardens) providing sites. Currently about 50 weddings a year occur in the Chapel, and there is capacity for many more. Supporting businesses, including a florist, beauty shop, and bridal shop also contribute to this attraction.



**Historic Olmsted Falls Depot**

*Source: City of Olmsted Falls*

In addition, Cleveland is part of an extensive market for train enthusiasts, who identify Olmsted Falls as an excellent place to view train activity. Finally, it is becoming recognized that the young “creative class” which is making its home in urban environments such as Cleveland’s Ohio City and Downtown neighborhoods, is attracted to small town, walkable environments with excellent schools and outdoor amenities as they begin to raise families. Olmsted Falls presents an opportunity to tap into this market in the long run. See the Market Analysis section below for more information on these opportunities, and others.

## SURVEY FINDINGS

### Downtown Visitors and Residents Survey

A confidential Downtown Survey of visitors and residents was conducted during March of 2014. The survey was prepared and tabulated by the Center for Community Planning and Development, reviewed by the CSU Institutional Review Board (IRB), and collected via the web, and with the assistance of the City of Olmsted Falls. About 30 paper surveys were collected at a popular evening winetasting fundraiser, and another 30 were collected from participants in Senior Center programming. The remaining 70 were collected online via CSU's Qualtrics capability, via a link on the City's main web page (total 129 surveys). A local newspaper article advertised the survey link and helped to encourage participation.

The survey asked a range of questions about Olmsted Falls downtown and shopping, shopping elsewhere, and visiting of other small towns. A few basic housing questions were also asked.

Key findings from the survey are as follows. For detailed findings and survey questions, see the Appendix.

- Respondents appreciate the small town feel, and there is a desire to stay that way
- Many respondents identified restaurants as desirable
- Restaurants and community events are key attractors for other small towns
- Respondents' primary reasons for going elsewhere for mainstream shopping were *selection* and *convenience*
- Respondents offered a wide range of interesting ideas, including a bakery, coffee shop, specialty grocery, small town hardware, and programming/events. (see Appendix for detail)
- Accessibility is a concern: sidewalks, parking were mentioned as needing enhancement
- There is an interest in living here among respondents who are not current residents
- The majority of respondents who are current residents intend to live here a very long time (over 10 years)
- There is a desire for a range of housing types among all respondents

### Online Merchants survey

A confidential online survey was offered to merchants in the downtown during March of 2014. The survey was designed, collected, and analyzed by the CSU Center for Community Planning and Development, and reviewed by the CSU Institutional Review Board. Questions were asked regarding customer base, income, costs, challenges and advantages. 13 respondents participated. Due to the confidential nature of the survey, specific findings are



not disclosed to the City or others, but responses were aggregated to identify key findings and response ranges, as follows. For more detail, see the Appendix.

- A range of business types was represented – restaurant, gift, professional services, and various specialty shops.
- Store sizes range from 800 to 3800 square feet.
- Number of customers on a normal day ranged from 5 to 200. The mean was 45; the median was 20. Walk-in customers ranged from 5% to 100%. Repeat business customers ranged from 45% to 100%. Percentage of local customers fell in three groups: 10%; 50-60%; and 90%. Percentage of Northeast Ohio customers ranged from 5% to 80%. Percentage of customers outside the region ranged from 10 to 25%.
- Of the 9 who responded to the questions, 8 or 9 stated that service, unique products, quality, and selection were their primary competitive advantages.
- Key challenges identified included: need for improved signage and lighting; challenges of advertising in the digital age; improving viability of businesses; reducing turnover; providing better accessibility for mobility-impaired customers; need for critical mass and diversity of stores; need for improved alignment of open hours among businesses; need for marketing of the area as a whole.

### Merchant/Realtor Interviews

The online survey was supplemented by informal conversations with six merchants and two realtors. Key findings are as follows. See the Appendix for more detail, and see the Housing Market Analysis section for additional realtor interview summary.

- Olmsted Falls advantages for businesses, customers and residents include: Good schools, historic downtown with specialty shops, creek landscape right in downtown, train appeal, small town appeal, wedding/event facilities/amenities
- Olmsted Falls disadvantages include: Freeway, train and plane noise, train tracks used very often through middle of retail area, busy traffic on Columbia Road, lack of parking in downtown, high property taxes
- Specific advantages for business: Historic downtown, Complement of businesses attract customers, potential for increasing sales in the future, high traffic counts on Bagley and Columbia Road
- Retail advantages over competitors include: local buyers come for good service/personal attention, unique higher quality products; regional buyers come for small town character, critical mass of unique shops, train and craft interests, complement of restaurants; wedding clientele attracted by high quality historic unique facilities, picturesque outdoor venues; shops complement each other
- Key needs include: Signage and lighting; help with advertising; coordinated effort in putting on events and programming; an anchor that would keep people here for a whole day – museum, train venue, major park connection, historic tours, etc.; more diversity of businesses that would appeal to men, millennials, non-upscale

customers; trendy themes and lighting; expand parking; better parking/access for handicapped and mobility impaired; coordinate hours of operation to provide best experience for customers, and to take advantage of peak times

- Other ideas offered: Use City service area to expand trail connections, train connection, park connection, pedestrian bridge; Capitalize on the falls; Explore walkability/access to existing homes; Explore overnight stay/bed and breakfast; Explore small office uses; Look at design of spaces between shops to encourage lingering, patio dining, traffic routes to all businesses.

## MARKET ANALYSIS

### Community Facts

Table 5 outlines the basic characteristics of the Olmsted Falls community. Information is given for the City proper, and also its zip code 44138 (City of Olmsted Falls together with Olmsted Township, which forms the school district).

COMMUNITY FACTS							
	Olmsted Falls 2000	% change	Olmsted Falls 2010	44138	Cuyahoga County	Ohio	USA
Total Population	7,962	13.3%	9,024	22,322	1,280,122	11,536,504	308,745,458
Total Number of Households	3,121	18.0%	3,684	8,695	545,056	4,603,435	116,716,292
Persons/Household	2.55	-4.0%	2.45	2.57	2.35	2.51	2.65
Children under 18	26.6%	-8.0%	24.5%	24.4%	22.7%	23.7%	24.0%
Adults 18-64	63.5%	-2.6%	61.8%	59.6%	61.8%	62.2%	63.0%
Adults over 65	9.9%	38.4%	13.7%	16.0%	15.5%	14.1%	13.0%
Median Household Income	\$ 57,826	N/A	\$ 69,340	\$ 66,087	\$ 43,861	\$ 48,246	\$ 53,046

**TABLE 5 Community Facts**

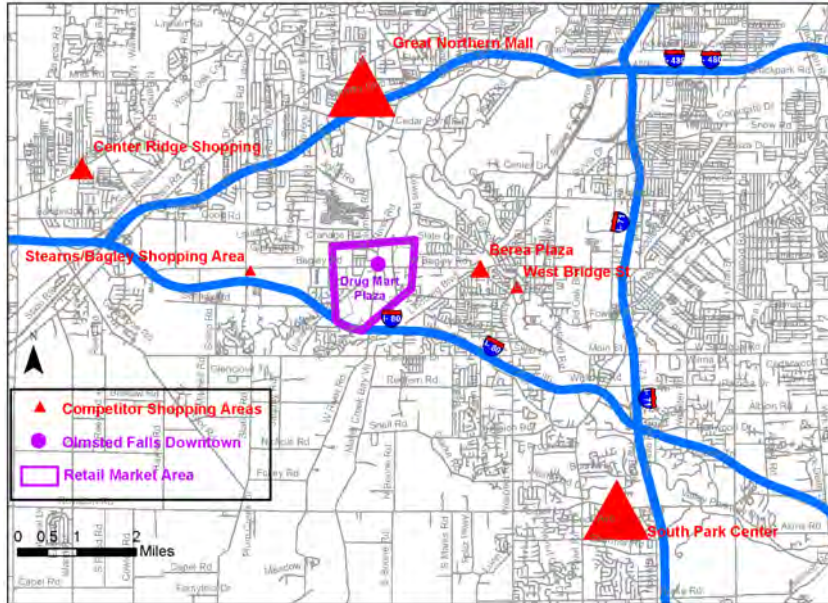
Source: U.S. Census

The market analysis for this project is complex because retail, office and lodging all fall into a “specialty” category, which is outside the standard markets. The following discussion outlines Standard Retail and Office uses, and follows with Specialty Retail and Office, and Bed and Breakfast analyses.

### The Standard Retail Market

Olmsted Falls enjoys easy access to an abundance of standard retail shops, restaurants, and services. At least 5 million square feet are available within 10 minutes’ drive of the downtown, in North Olmsted, North Ridgeville, Berea, and Strongsville. In addition, there is the beginning of a new commercial center to the west in Olmsted Township, at Stearns and Bagley Roads. In general, the entire Northeast Ohio area is acknowledged to be saturated for retail space, having a high square footage per capita rates compared to

average areas in the country (Cuyahoga County Planning Commission, 2000). The gravity model map demonstrates that the market area for standard retail in the downtown area is quite small, comprising a little over 1,000 households.



**Standard Retail Market Area – Olmsted Falls**

Source: CSU CCPD

RETAIL MARKET AREA CHARACTERISTICS	
Total Population	2,902
Total Households	1,164
Average Income	\$ 73,140
Total Household Income	\$ 84,336,854

**TABLE 6 Standard Retail Market Area Characteristics**

Source: U.S. Census and CSU CCPD

A standard niche analysis for consumer retail and consumer services, as shown in Tables 7 and 8, demonstrates that the demand for undifferentiated retail and services is indeed saturated in the area. Of interest, the one use that indicates some demand is “specialty food services”, or catering.

Category	Total SF Supported	Less Existing SF	Total Gap in SF Needed	Avg Establish ment Size in SF	Total No. Stores Needed
<b>RETAIL/FOOD SERVICE SALES</b>					
Special Food Services	1179	0	1179	1000	1.18
Building/Garden Materials/supplies	1305	0	1305	3000	0.43
Automotive Parts/Accessories/Tires	2051	0	2051	5000	0.41
Furniture Stores	663	0	663	3000	0.22
Shoe Stores	358	0	358	2000	0.18
Clothing Stores	1770	0	1770	10000	0.18
Bars and Taverns	280	0	280	2000	0.14
Electronics/TV	418	0	418	3000	0.14
Grocery Stores	2737	0	2737	20000	0.14
Pharmacies and Drug Stores	1306	0	1306	10000	0.13
Other home furnishings stores	261	0	261	2000	0.13
Discount Department Stores	1216	0	1216	10000	0.12
Other health and personal care product	330	0	330	3000	0.11
Books, periodicals, and music	169	0	169	2000	0.08
HH Office supplies/stationery	383	0	383	6000	0.06
Other Building Materials	75	0	75	1700	0.04
Computer/software stores	212	0	212	5000	0.04
Beer, wine and liquor stores	1146	1070	76	2000	0.04
Paint/Wallpaper	70	0	70	2000	0.04
Hardware	328	0	328	10000	0.03
Retail Bakeries	49	0	49	1500	0.03
Sporting Goods and Bicycles	260	0	260	10000	0.03
Warehouse Clubs and Supercenters	3888	0	3888	150000	0.03
Floor covering stores	73	0	73	3000	0.02
Luggage and Leather Goods	26	0	26	1500	0.02
Household Appliances	122	0	122	10000	0.01
Used merchandise/antiques/vintage	1730	2774	-1044	3000	-0.35
Restaurants Limited Svc (fast food)	1503	2920	-1417	2500	-0.57
Hobby, Toy and Game Stores	233	2000	-1767	3000	-0.59
Sewing, Fabric and Crafts Stores	77	1238	-1161	1500	-0.77
Florists	102	1400	-1298	1500	-0.87
Convenience/Gas station	970	3669	-2699	2500	-1.08
Jewelry Stores	237	1521	-1284	1000	-1.28
Specialty Food Stores	510	3496	-2986	1500	-1.99
Other miscellaneous retailers	1413	5584	-4171	2000	-2.09
Restaurants, Full Svc	4792	12208	-7416	3000	-2.47
Gift, novelty and souvenir	189	5204	-5015	2000	-2.51
All other General Merchandise Stores	960	33764	-32804	4000	-8.20
<b>TOTAL</b>					

**TABLE 7 Standard Retail Niche Analysis**

Source: CSU CCPD

Category	Total SF Supported	Less Existing SF	Total Gap in SF Needed	Avg Establishme nt Size in SF	Total No. Stores Needed
Real Estate	458		458	1000	0.46
Misc. Repair	701		701	1800	0.39
Funeral/Burial Svcs	161		161	6000	0.03
Fitness and Health Clubs	112		112	5000	0.02
Travel Agencies	26		26	2000	0.01
Cinemas	92		92	10000	0.01
Daycare/Nursery	34		34	5000	0.01
Bowling	26		26	10000	0.00
Radio/Television/Electronic repair	6		6	3000	0.00
Other Arts/Entertainment/Recreation	551	5444	-4893	10000	-0.49
Photography	5	1000	-995	1800	-0.55
Pet Care	180	1544	-1364	2300	-0.59
Banks	0	2465	-2465	3500	-0.70
Legal Services	206	984	-778	1000	-0.78
Computer Systems	0	1033	-1033	1000	-1.03
Laundromat/Dry Cleaning	8	3350	-3342	2000	-1.67
Other Services	145	3953	-3808	2000	-1.90
Tax Preparation/Accounting	13	2686	-2673	700	-3.82
Automotive Repair	91	10288	-10197	2500	-4.08
Barber/Beauty/Unisex	63	6252	-6189	1500	-4.13
Financial Services/Insurance	1967	11547	-9580	2000	-4.79

**TABLE 8 Standard Consumer Services Niche Analysis**

Source: CSU CCPD

### The Standard Office Market

The market for office space in the Cleveland area, while looking up somewhat since 2012, is still operating at very high vacancy rates. An article in Crain’s Cleveland Business from January 2014 states that downtown Cleveland office vacancy rates run at about 18%, and the southern suburbs, where Olmsted Falls is located, are at between 20 and 22%. (Bullard 2014) This alone is justification for the City to avoid major “mainstream” office projects in the near future.

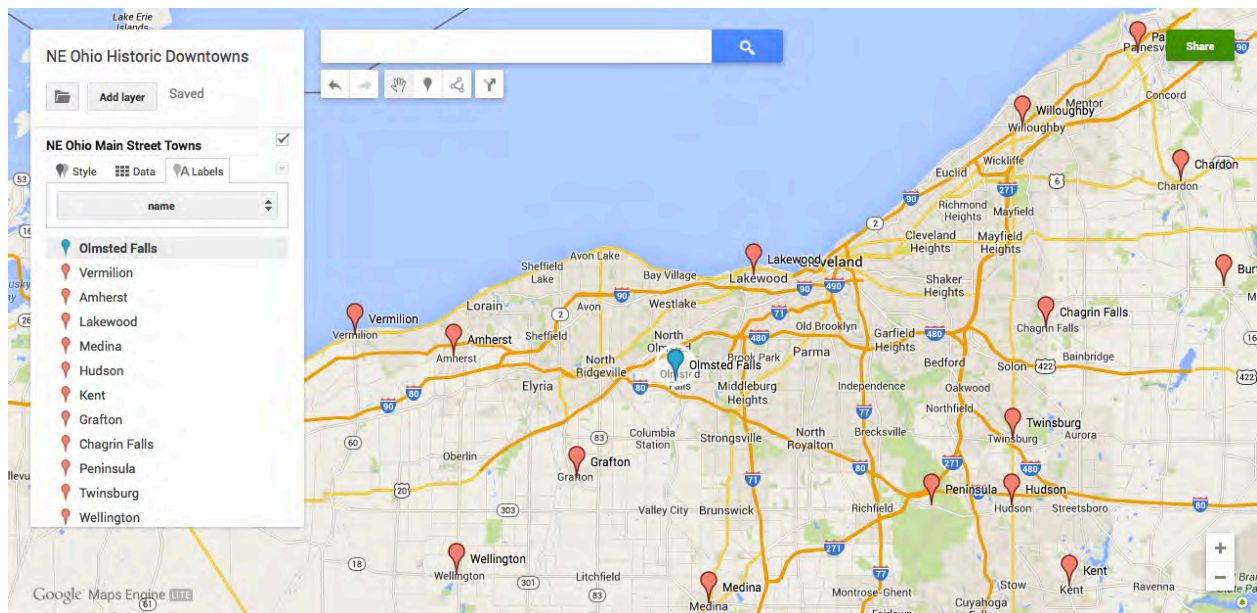
### The Specialty Retail and Office Market

However, it is also well known that specialty retail and office in historic downtowns can thrive under the right conditions. Unquantified to our knowledge, there remains evidence across the country of a specialty market of customers and professionals who prefer to shop and do business in a small town environment. In spite of a sea of standard retail, and the growing internet environment, hands-on shopping and professional consultation continues to do well in the right setting. What might the capacity be for growth in downtown



Olmsted Falls, if its downtown retail and office environment were enhanced? We were unable to find much in the way of analysis or modeling methods by others in this area. In interviews with merchants, it became clear that a “small town gravity model” did not make sense, because small towns actually enhance each other, rather than competing, by providing a critical mass of different places to visit for weekend day-trippers who desire to explore small downtowns. As one merchant put it, “they come from all over the region, and they visit a different town every weekend.”

We therefore attempted to do a comparison of small towns in Northeast Ohio to understand the relationship of square footage, number of businesses, number of households, mean household income, and total buying power. The map shows many of the most well-known historic small downtowns in the area. Five of these were chosen for comparison to Olmsted Falls. Of particular interest, Chagrin Falls is a benchmark, because of its similar assets, and location in a suburb surrounded by large amounts of standard retail, and because of its reputation as a thriving downtown. Amherst, Vermilion, and Wellington were chosen because they are close to Olmsted Falls and likely to attract similar customers. And Medina was chosen because of its reputation as a strong, thriving historic downtown, which also attracts similar visitors. Initial data was collected on other downtowns. It would be interesting to expand this analysis over a longer time frame.



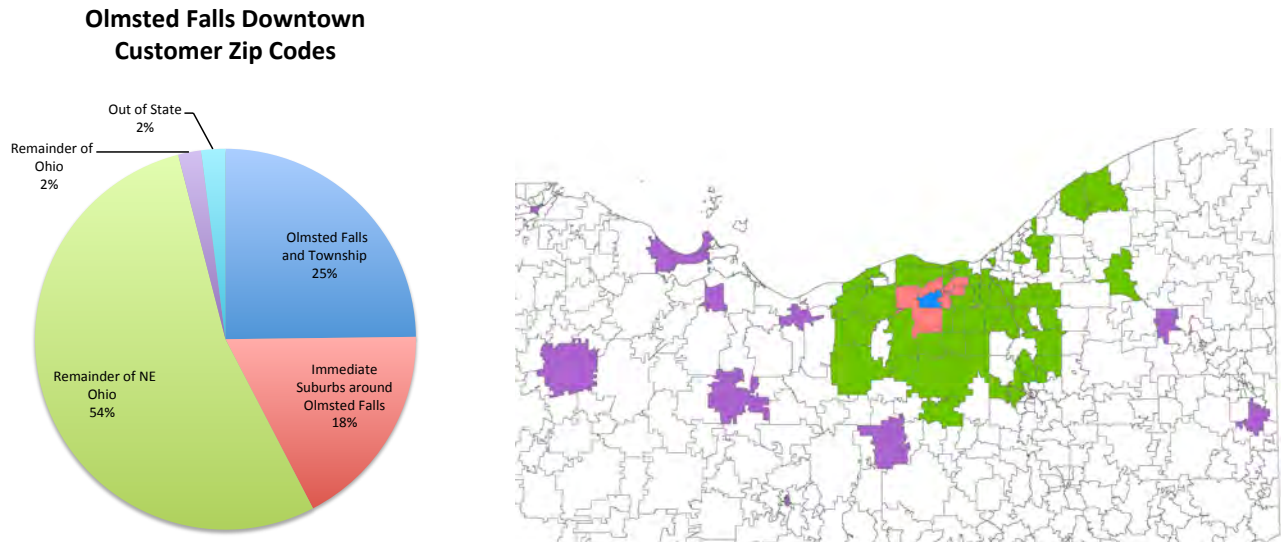
### **Selected Northeast Ohio Historic Downtowns**

*Source: Google Maps and CSU CCPD*

**The Olmsted Falls Downtown Retail Customer Base.** 800 zip code addresses were provided from the downtown merchant’s association, and from a local merchant, to understand where existing customers come from. These zip codes were collected over two two-week periods in August and December of 2009, and in a one-day event in 2013. About 45% come from the Olmsted Falls/Township zip code, and the zip codes immediately surrounding it. Another 50% come from a wide range of zip codes across Northeast Ohio. Two percent come from all over Ohio, as far south as Columbus and Cincinnati, and another



two percent come from outside Ohio, especially Pennsylvania and Michigan, but including New York, Illinois and Massachusetts.



### Olmsted Falls Customers Zip Code Analysis

Source: Grand Pacific Junction Merchants Association  
CSU CCPD

**Comparison Towns Customer Base and Retail/Office businesses.** It was decided to look at the 50% from the immediate zip code and surrounding zip codes as the basis for comparison of the towns. Zip codes were chosen instead of census tracts or blocks because of their relatively similar size, and ease of gathering data quickly from fewer data points, and relationship to the Olmsted Falls data that was available. The zip codes around each town were mapped, and the first floor square footage was measured via Google maps for each historic downtown area. Where the “edge” of the historic downtown was not clearly delineated, square footage within four blocks (1/4 mile) of the downtown center was measured. In addition to square footage measurements, a detailed inventory of businesses in each downtown was collected via Yellow Pages, merchants’ association, and other business association web sites.

*It should be noted that there were large discrepancies between our measurements of Olmsted Falls’ first floor square footage, and the County auditor’s measurements. See the Business Inventory in the Appendix for more information. Our estimates were 30% lower than the County Auditor’s. This was not the case in spot-checks of our measurements against another county auditor’s square footages. For the purposes of this study, with limited time to verify the area of each building, we assumed in most cases the County Auditor’s information was correct, which was the more conservative approach. However, analysis below that is based on those numbers must be taken with some understanding that it is possible that actual square footages are lower, and therefore the retail capacity could be higher.*

COMMUNITY	DNTN BUSINESSES				GENERAL DATA INPUTS							STREETS/TRAFFIC	
	ESTIMATED TOTAL SF(3)	ESTIMATED TOTAL BUSINESS ES	ESTIMATED NO. RETAIL BUSINESSES	ESTIMATED NO. OFFICES	MARKET AREA (1)							MAIN STREETS	TRAFFIC COUNT RANGE IN DNTN 2013
TOTAL POP 2012					LAND AREA (SQ. MI.)	AVG HH SIZE	DENSITY POP/SQ. MI	TOTAL HH	MEAN HH INCOME				
Chagrin Falls	293,776	252	111	141	168,744	181.69	2.45	929	68,799	\$ 101,643	W. Orange	7,388	
Amherst	68,237	91	39	52	180,903	194.23	2.50	931	72,466	\$ 74,490	Cleveland Av	N/A	
Vermilion	144,300	74	41	33	10,507	10.8	2.31	973	4,555	\$ 53,566	Liberty Ave	11,740	
Wellington	215,900	100	60	40	55,081	481.04	2.84	115	19,423	\$ 65,948	OH 58	12,030	
Olmsted Falls	135,500	69	37	32	126,859	94.57	2.51	1,341	50,543	\$ 64,396	Columbia Rd	6,100	
Medina	358,100	242	74	168	157,971	295.9	2.64	534	59,739	\$ 81,776	N. Court	13,770	

Notes:

"Retail Businesses" includes retail establishments for specialty shopping and dining. Excludes medical/dental, professional, neighborhood services and stores, lodging, and community facilities.

"Offices" includes medical/dental/optical, real estate, design/engineering, computer/IT, financial/accounting/banks/insurance

(1) "Market Area" includes the community and its first-ring zip codes

(2) "Community" includes the city or village proper only.

(3) Estimated SF is gross first floor square footage, as measured from an aerial photograph (Google maps).

(4) Oberlin excludes the 65-room Oberlin Inn, a hotel in the downtown

### TABLE 9 Historic Downtowns Comparison – General

Source: US Census 2012; CSU CCPD; Google Maps

Table 9 illustrates the comparison of general information between the downtowns. Items to note:

- Chagrin Falls has the highest mean household income, followed by Medina.
- Olmsted Falls has the second lowest mean household income of the six compared.
- Medina, Olmsted Falls, Amherst, and Chagrin Falls are similar in the total number of households in the market area, about 50-70,000.
- Medina has the highest square footage of first floor retail space, followed by Chagrin Falls and Wellington.
- Olmsted Falls has the second lowest square footage of first floor retail space, close to Vermilion.
- Medina, Vermilion and Wellington's main streets have a traffic count range of roughly 11-14,000 Average Daily Traffic(ADT).
- Chagrin Falls' and Olmsted Falls' main streets are similar with 6100 and 7300 ADT respectively.

COMMUNITY	DNTN BUSINESSES			COMPARATIVE PARAMETERS			
	ESTIMATED TOTAL SF(3)	ESTIMATED BUSINESS ES	MARKET AREA (1)	Retail		FF Business	
Businesses/ \$10,000 buying power				Businesses/ \$100 million buying power	Businesses/ \$10,000 buying power	Businesses/ \$100 million buying power	
Chagrin Falls	293,776	252	\$ 6,992,936,757	10.92	1.59	28,903	420
Amherst	68,237	91	\$ 5,397,992,340	5.24	0.72	9,161	126
Vermilion	144,300	74	\$ 243,993,130	7.65	16.80	26,939	5,914
Wellington	215,900	100	\$ 1,280,908,004	9.10	4.68	32,738	1,686
Olmsted Falls	135,500	69	\$ 3,254,767,028	5.75	1.14	21,042	416
Medina	358,100	242	\$ 4,885,216,464	9.05	1.51	43,790	733

### TABLE 10 Historic Downtowns Comparison – Buying Power (see notes below Table 9)

Source: US Census, CSU CCPD

Table 10 illustrates a comparison of buying power and number of retail establishments per household. Items to note:

- While Chagrin Falls has the highest total buying power in its market area, when equalized by proportion of that income, its square footage falls into the range of the others.
- In particular, the first floor (FF) square footage per \$10 million buying power, and number of businesses per \$100 million buying power, are in the range of Olmsted Falls and Medina. Of interest, all three of these have substantial surrounding standard retail, and Chagrin Falls and Medina are thriving.
- While Medina’s role as a county seat is likely the reason for its much larger total number of businesses, it can be surmised that these are professional offices, frequently locating in second and third floor spaces, which were not measured in this analysis. When equalized based on first floor retail, the numbers appear to be comparable.
- Vermilion’s high numbers can be explained by the lakefront location and the presence of extensive marinas, boat sales and repair, lodging, and beachfront retail businesses serving a large customer base coming from outside the immediate market area.
- Wellington’s high numbers can be explained by a much lower amount of standard retail in the market area. Wellington’s downtown has proportionally more grocery, drugstore, and general merchandise retail to serve general market area needs.
- Amherst’s numbers are the lowest, and this analysis would indicate that there is room for expansion of this retail supply, if other conditions were met for amenities.
- When number of businesses per buying power (mean HH income and total income) are compared, Olmsted Falls indicates additional capacity could be supported, perhaps up to 25-50%.
- When square footage of businesses per buying power are compared, Olmsted Falls appears to be in line with other towns, and has only small additional retail capacity (less than 10% when compared to Chagrin Falls). *(See note above regarding limitations of square footage data).*

COMMUNITY	DNTN BUSINESSES					
COMMUNITY	ESTIMATED TOTAL SF(3)	ESTIMATE BUSINESS ES	ESTIMAT ED NO. D TOTAL RETAIL BUSINES S	% of Total	EST NO. OFFICES	% of Total
Chagrin Falls	293,776	252	111	44%	141	56%
Amherst	68,237	91	39	43%	52	57%
Vermilion	144,300	74	41	55%	33	45%
Wellington	215,900	100	60	60%	40	40%
Olmsted Falls	135,500	69	37	54%	32	46%
Medina	358,100	242	74	31%	168	69%

**TABLE 11 Historic Downtowns Comparison – Professional Office** (notes below Table 9 apply)

Source: CSU CCPD

Table 11 illustrates the relationship of professional office space to specialty retail in each downtown. Items to note:

- Professional offices in each of the downtowns except one represent from 40 to 60% of the total businesses (roughly half).
- Medina’s higher percentage, at 70%, can be explained by its role as a county seat, and the associated higher number of attorneys, real estate professionals, surveyors, and related fields that would benefit from that location.
- Specialty office workers can be a boon to downtowns by providing daytime activity, restaurant patrons, and personal service to customers, and income tax to the community.

### **Destination Draws: Placemaking is Good for Business**

The national Main Street program, well-known for its role in helping to revitalize strong Main Street towns in Ohio and elsewhere, emphasizes capitalizing on existing, unique assets as key to small town economic development. Furthermore, the National Association of Realtors, in its Summer 2013 edition of Common Ground, makes the following notes:

“Across the country, community leaders are joining together to bring new life back to small towns. They are doing it by focusing on the existing assets of a community – its history, culture and landscape – or by creating a new source of vitality, such as by encouraging artists to flourish or by undertaking creative placemaking.” (p.2)

“Despite Deep Recession, Small Towns Roar: Mayors in small towns are championing smart growth to create thriving communities.”...(p. 46)

“A Case for Place: By creating places that attract people, Michigan is using the concept to boost communities... Placemaking is a growing international movement that capitalizes on a local community’s assets, inspiration and potential.” (p.28)

Olmsted Falls has many such amenities on which to capitalize. Many towns – and larger cities, for that matter - have organized their growth strategies around waterfronts of rivers and lakes. With frontage on the Rocky River, and Falls both on the river and Plum Creek, the confluence of the river and creek, and existing parkland at that confluence, the City has a primary asset that could be a major draw to visitors. In addition, its collection of very well-restored historic buildings creates a unique historic character that is recognized by visitors and residents alike.

In reviewing the individual characteristics of towns across the region, it is apparent that there are several factors that contribute, outside the quantity of purchasing power, to the success of a historic downtown. An inventory of “anchors” or “key amenities” in twelve downtowns across the region shows that they all have some of the following. See the Appendix for detail.

- A critical mass of activities that could fill an entire day, or more, of visitors' time
- Significant outdoor recreation opportunities
- A college, medical complex, professional and/or county offices that provide daytime users
- A critical mass of shops that enhance each other by providing choice and selection for shoppers
- Many have a natural amenity or attraction, such as Chagrin Falls' river park and falls, or rural countryside
- Overnight lodging to enhance evening visitor count
- Evening attractions such as a community theater, concert venue or small-scale movie theater
- Some have neighborhood standard retail amenities that attract daytime users as well, such as a grocery store, pharmacy, gas stations, beauty shop, or drycleaner

**A sense of place.** Finally, it is important to note the value of Placemaking in small community downtowns. As noted by the National Association of Realtors above, placemaking is critical as a way to capitalize on the unique "sense of place" that many small downtowns have. Places with a "sense of place" attract people – to live, work, recreate and shop. Of note, the state of Michigan, working with the Michigan Association of Realtors, has instituted a program specifically focused on Placemaking as an economic development tool. Key to the program is the recognition that placemaking involves an interdisciplinary approach integrating several components:

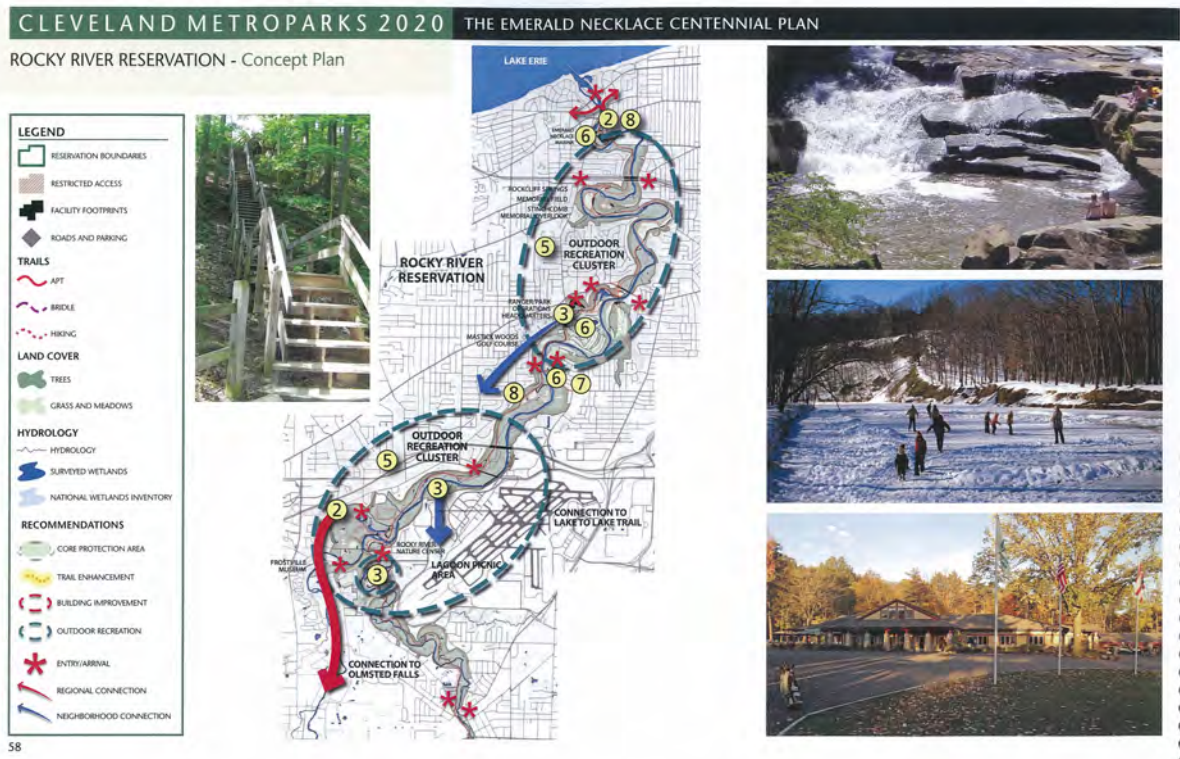
- Housing
- Transportation
- Historic Preservation
- Main Street organization/enhancement
- Green Space
- Talent
- Entrepreneurialism
- TIDE (Talent, innovation, diversity, environment) growth model

In Olmsted Falls, there is a strong sense of place within Grand Pacific Junction, which could be expanded to integrate businesses along the entire downtown stretch of Columbia Road. Enhancing the pedestrian, bicycle, auto and transportation environment, working with merchants to strengthen businesses and marketing, increasing housing and residents in the downtown, tying into greenspace opportunities, and seeking other innovative ways to encourage local entrepreneurs could lead to a stronger business and economic environment in the long run.

The following opportunities situate Olmsted Falls to be able to provide similar amenities over time.



## Cleveland Metroparks' Trail Connection



### Rocky River Reservation Concept Plan, Emerald Necklace Centennial Plan

Source: Cleveland Metroparks

One of the significant external factors in the downtown's potential is the planned multi-use trail connection from Mill Stream Run and/or Rocky River Reservations by the Cleveland Metroparks. As indicated in the Metroparks' new Strategic Plan 2020, a connection to Olmsted Falls is designated in their policy for Rocky River Reservation (policy RR2.1), to "encourage local initiative for significant greenway and trail extension to Olmsted Falls... tie into Mill Stream Run Reservation at Wallace Lake." As shown on the regional trail proposals map, additional connection opportunities lie to the north along the West Branch, tying into Rocky River Reservation. (see illustration). Furthermore, plans for Rocky River and Mill Stream Run Reservations themselves involve tying their trail systems into the connections to the Lakefront over time. These opportunities can take multiple years to be funded and come to fruition, but stand to create a significant boon to Olmsted Falls as a destination for bicycle and recreational travelers. The City is encouraged to begin conversations about implementation, with an eye for the long term benefits.

**Train-Related Attractions.** The historic Depot site is owned by the Cuyahoga Valley West Shore Model Railroad Club. Open only periodically for display of historic train information from around the region, there is potential for this to develop into a more substantial museum attraction that could be a day trip destination for train enthusiasts. There is a sizeable group in Northeast Ohio and beyond who share an enthusiasm for trains, model trains, and historic re-enaction. In January, a model train show at the I-X center drew



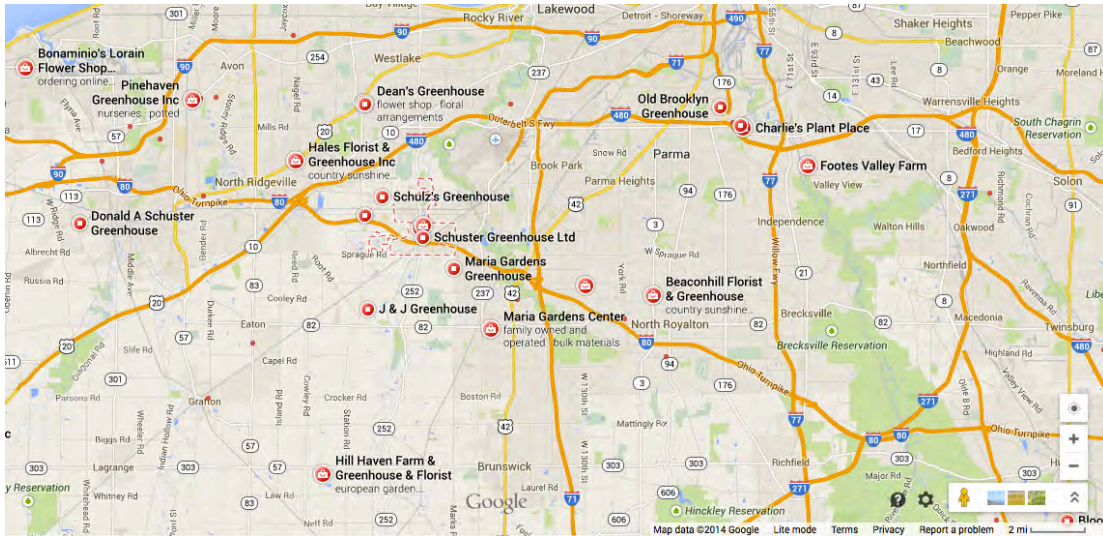
25,000 attendees, with 70 exhibitors and multiple model train exhibits. The National Model Railroad Association will hold its annual convention in July 2014 at the Cleveland Convention Center; 176,000 square feet of space with 330 vendors is planned. Such groups provide an opportunity for Olmsted Falls to capitalize on its railroad connections, and the prime viewing sites offered by the Grand Pacific Junction gazebo, the Depot and the City service yard adjacent to it (another potential development site).

**Wedding Destination.** The Grand Pacific Hotel, Wedding Chapel and Wedding Gardens have become a wedding destination over time, and currently have unused capacity with the potential to grow. The attraction of wedding parties and their guests to Olmsted Falls provides an opportunity to increase awareness of the downtown as a destination, as well as increasing sales opportunities at the time of each event. Wedding participants also present a potential market for boutique overnight lodging in the downtown area. It will be worthwhile for downtown merchants to consider ways to take advantage of these events, to include the wedding venues in downtown marketing and advertising, and to support these businesses as an anchor providing opportunities for everyone.

**Baldwin Wallace University Connections.** This local college of 4,000 students is 3 miles east of Olmsted Falls in Berea. Directly accessible from Olmsted Falls via Bagley Road, the University is home to nationally-ranked programs in music and musical theater. Students, visitors and parents from across the country regularly visit the University. The Berea downtown is limited in its scope, and it appears that there could be room to attract these visitors (as well as the students) to a more sizeable historic downtown such as Olmsted Falls, especially if special attractions and bicycle connections were enhanced.

**Olmsted Falls Performing Arts Association.** One mile to the north of the downtown, along the Rocky River, the Olmsted Falls community theater group has recently purchased a large former church site. Home to regular theater productions and classes, with plenty of parking, this site offers an amenity that could draw people to the downtown for evening meals before theater, and dessert/socializing afterwards. Opportunities for partnerships could lead to impromptu performances at the site. With time, a trail connection along the river could provide the opportunity for golf cart shuttles and bicycle connections between the theater and the downtown.

**Greenhouse Business/Retail Cluster.** As shown on the map, the Olmsted Falls area is home to a cluster of greenhouse businesses, both wholesale and retail, many dating to the pre-suburban agricultural era. Two of the largest, Uncle John's Plant Farm and Schuster's Greenhouse, are located in the City of Olmsted Falls, along Columbia Road just south of the Downtown Area; the others are in Olmsted Township, North Royalton, and surrounding communities. The potential exists for these businesses and their communities to organize for marketing and branding purposes to encourage visitors and gardening enthusiast day trips. Supplemental businesses, such as teahouses, art galleries, and specialty shops could be encouraged to enhance the area as an attraction destination. The Olmsted Falls downtown area businesses could contribute to the cluster in the long run. A good example is this year's planned fairy garden and herb festival.



**Olmsted Falls Area Greenhouse Cluster**

Source: Google Maps

**Bed and Breakfast Lodging Market**



**Selected Bed and Breakfasts in Northeast Ohio (see table for list)**

Source: Google Maps

In addition to increasing the number of residents, retail shops, and professional offices downtown, providing overnight lodging is another component of attracting people and activity. As shown on the map, there are an abundance of Bed and Breakfasts in Northeast Ohio, demonstrating the strength of the market for alternative lodging, particularly in attractive, natural, rural, and small town settings. This is supported by the fact that of the six small downtowns compared, Olmsted Falls is the only one without overnight lodging. The table illustrates that there are four rooms within 5 miles of the downtown, and only 7 within 15 miles, including the first four. The low number of competitors, along with the opportunity for long distance trail connections, train enthusiast visitors, wedding party

members, and Baldwin Wallace University visitors, indicate that there should be a market for a small-scale Bed and Breakfast in Olmsted Falls over the long term.

BED AND BREAKFASTS AND OLMSTED FALLS	
No. rooms within 5 miles	4
No. rooms within 10 miles	4
No. rooms within 15 miles	7
No. rooms within 20 miles*	35
No. rooms within 30 miles*	83
Total rooms w/in 60 miles*	184

\*excludes 65-room Oberlin Inn

**TABLE 12 Historic Downtown Bed and Breakfast Rooms within 60 miles of Olmsted Falls**

Source: CSU CCPD

COMMUNITY	DNTN BUSINESSES					
COMMUNITY	ESTIMATED TOTAL SF(3)	ESTIMATED TOTAL BUSINESS ES	ESTIMATED NO. RETAIL BUSINESSES	EST NO. OFFICES	AVGE SF/ BUSINESS S	B&B/INN LODGING ROOMS (4)
Chagrin Falls	293,776	252	111	141	1166	15
Amherst	68,237	91	39	52	750	5
Vermilion	144,300	74	41	33	1950	11
Wellington	215,900	100	60	40	2159	15
Olmsted Falls	135,500	69	37	32	1964	0
Medina	358,100	242	74	168	1480	6

**TABLE 13 Comparison of Lodging Rooms in Historic Downtowns**

(See notes below Table 9) Source: CSU CCPD

BED AND BREAKFASTS IN NE OHIO					
NAME	CITY	NO. ROOMS	RATES RANGE	AMENITIES	DISTANCE FROM OLMSTED FALLS (MI)
5 Corners B&B	Amherst	5	\$99-\$169	historic	20
Old Vermilion Jail House	Vermilion	3	\$289	price for all three; lakefront/beach	28
Gilchrist Guest House	Vermilion	4	N/A		28
Captain Bell House	Vermilion	4	\$99-179	all suites	28
Riverside Gables	Berea	4	\$110-155	Baldwin-Wallace College	3
Villas at Gervasi Vineyard	Canton	24	\$249-300	vineyard	60
		1	\$852	farmhouse sleeps 8	
Fieldcrest Estate	N Canton	9	\$99-295	tea house	58
Inn of Chagrin Falls	Chagrin Falls	15	\$130-225	2 conference spaces for 10-12	31
Bass Lake Inn	Chardon	12	\$115-140	banquet room up to 100, golf course	48
Whimsical Pig	Barberton	4	\$115-195	Wolf Creek	36
Ultimate Zen	Medina	2	\$100	countryside/garden	19
1830 Hallauer House	Oberlin	2	\$125-135	Oberlin College, historic	20
		1	\$175-185	suite	
Ivy Tree Inn and Garden	Oberlin	4	\$80-135	oberlin college	22
Inn at Brandywine Falls	Northfield	3	\$145-210	National Park/trails/etc	30
		2	\$165-340	suites	
Shady Oaks Farm	Northfield	5	\$200-250	all suites	30
Lake Breeze Inn	Sheffield Lake	4	\$105-205	Lakefront property	19
Reutter's Roost	Valley City	3	\$95-115	102 acre farm/countryside	12
Market Street Inn	Wooster	5	\$90-115	Wooster College	50
Black Squirrel Inn	Wooster	4	\$75-105	Wooster College	50
Stone Gables	Cleveland	4	\$140-225	city neighborhood	16
		1	\$150-200	suite	
Red Maple Inn	Burton	18	\$119-220	view, conference room for 100, restaurant, Amish country	50
Deer Creek	Litchfield	2	\$99-129	woods	26
JB King Guesthouse	Hudson	5	\$125-175	Main St/historic	31
Spitzer House	Medina	4	\$100-135	downtown	19
Oberlin Back House Cottage	Oberlin	1	\$150-175	Oberlin College	21
Aunt Connie's Cottage	Oberlin	1	\$150	Oberlin College	20
Oberlin Inn	Oberlin	65	\$85-165	Oberlin College	20
Shurtleff Cottage	Oberlin	4	N/A	Oberlin College	20
The Buckeye and the Frog	Oberlin	2	\$120-160	Oberlin College	20
Spreng Haus	Wellington	3	\$100	one 3-BR suite	
Wellington Country Inn	Wellington	4	\$95-130	Historic, countryside	27
Wild Goose Inn	Obelrin	N/A	\$150	oberlin college	20
Wellington House	Wellington	8	\$130-180	historic, countryside	25
Riverdog Retreat	Wakeman	4	\$125-150	4 separate small houses w/kitchens	28
Cabin in the Woods	Wakeman	3	\$135	woods	29
Just Imagine Guest House	Wakeman	N/A	\$85-215	woods	33
Sunset Shores B&B	Avon Lake		\$90-160	lake	14

**TABLE 14 Summary Data: Historic Downtown Bed and Breakfasts within 60 Miles of Olmsted Falls**

Source: CSU CCPD



Perhaps the best model for such a project is the Red Maple Inn in Burton. Built recently (in 1999) with eighteen rooms, fireplaces, a moderate conference room, central living room, and handmade furniture, it provides a homey “bed and breakfast” environment with modern amenities. A dining room serves breakfast and hors d’oeuvres daily, and an Amish style dinner twice a month. The Inn is one of five small lodging establishments in Ohio to win the coveted AAA “five-star” rating. Key visitor groups include tourists visiting Amish country, wedding parties, and business retreats.



### Red Maple Inn

Source: Red Maple Inn Web Site  
<http://www.redmapleinn.com/>



## The Olmsted Falls Housing Market

As noted above, an important part of strengthening a downtown is increasing the number or residents who live in the immediate downtown area, and increasing the accessibility of the downtown to existing residents. The following study puts the housing market of the downtown into focus with regard to housing type, price point, and potential buyers’ interests.

**Existing households.** Any study of residential housing must start with the households in the community. The Olmsted Falls housing market comprises the entire school district, coinciding with the 44138 zip code, and including both the City of Olmsted Falls and Olmsted Township. Existing households in the market area are almost evenly split between 1-person, 2-person, and 3+ person households. (A 2-person household can include an adult couple, whether unrelated or related, and also a single parent with a child; 3+ person households can include a single parent and children, couples with children, and unrelated adults.)

Other interesting information about household characteristics in both the City of Olmsted Falls and the 44138 zip code are shown in the Household Characteristics table. Of particular note:

- Within the city, about 17% of households are renters, and 83% are owners of their homes.

- About 66% of households are “Family” households (2 or more related persons); however, only 32% of all households in the City have children under the age of 18 living at home. 29% of all households are householders living alone.
- 98% of households have access to a vehicle; only slightly less than 2% do not.
- The community is very stable, with over 45% having lived in their current home at least 13 years. Another 42% have lived in their current home from 3 to 12 years, and 12% less than 3 years.
- Of interest, 33% of all city households who rent spend more than 35% of their income on housing costs. Among owner households, 23.5% of those with mortgages, and 21.7% of those without mortgages, spend more than 35% of their income on housing costs. A generally accepted “rule of thumb” is that households should not spend more than 30% of their income on housing.
- However, among homeowners without mortgages, 70% spend less than 20% of their household income on housing costs; 37% of those with mortgages spend less than 20%. Among renters, the figure is 28%.
- Household characteristics in the City and in the 44138 area code are fairly similar to each other. There are no notable differences between the two areas.

**Existing housing stock.** In the City, housing structures are primarily (64%) single family detached; attached units comprise the remainder. See the Physical Housing Characteristics table. Information of interest:

- Vacancy rates for owner-occupied homes are low for the region, at 1.6%. This compares to 2.9% for Cuyahoga County (2012 U.S. Census).
- Vacancy rates for rental units are slightly higher, at 12.6%, vs. 9.8% for Cuyahoga County. (2012 U.S. Census) Compare to reported rates in the 5% range in downtowns like Cleveland and Lakewood. (Cleveland.com).
- Single-family detached structures account for about 65% of the homes in the City; single-family attached (cluster and townhomes) are at 20%, and the remainder are largely split evenly between two-family and 10+ family structures. There are no mobile homes in the City.
- 65% of dwelling units (owner and rental) in the City have 2 to 3 bedrooms; another 26% have 4 or more bedrooms.
- 14% of homes in the City are 12 years old and newer; 21% are older than 53 years; and 65% are between 12 and 53 years old.
- 15% of owner-occupied in the City were worth less than \$100,000, according to the U.S. Census American Communities Survey 2008-2012. 32% are the largest group, in the \$100-150,000 range; 28% are at the \$150-200,000 range; and 19% are at the \$200-300,000 range. 4% are valued at more than \$300,000, with .6%, or about 20 homes, valued at more than \$1 million. The median home value in the City was \$152,000.
- Half of all dwelling monthly rental rates fell in the \$500-\$750 range. Only 1% were lower than \$500/month. 18% were in the \$750-1000 range, and 26% were in the \$1000-1500 range. There were no rental rates higher than \$1500. The median monthly rent was \$735.

<b>HOUSEHOLD CHARACTERISTICS 2012</b>		
<b>HH= Households</b>	<b>City of Olmsted Falls</b>	<b>44138</b>
<b>Total Households</b>	<b>3362</b>	<b>8695</b>
Renters	589	1891
Renter %	17.5%	21.7%
Owner	2773	6804
Owner %	82.5%	78.3%
Family HH (2 or more related)	66.2%	65.7%
Non-Family HH(all other incl. singles)	33.8%	34.3%
1-person HH	29.3%	29.8%
2-person HH	29.9%	32.3%
3-person HH	11.6%	12.1%
4+ person Households	29.3%	25.8%
Householders Living Alone	29.3%	29.8%
HH with related children under 18	32.2%	32.1%
HH without related children under 18	67.8%	67.9%
HH with vehicle available	98.1%	96.2%
HH without vehicle	1.9%	3.8%
No. HH without vehicle	64	330
<b>Time lived in current home or unit</b>		
2010+ (0-2 yrs)	12.0%	9.8%
2000-09 (3-12 yrs)	42.7%	48.1%
1990-1999 (13-22 yrs)	24.2%	22.5%
1980-1989 (23-32 yrs)	9.5%	9.2%
1970-79 (33-42 yrs)	6.8%	7.2%
1969 and earlier (43+ yrs)	4.8%	3.2%
<b>Rent as Percent of HH Income</b>		
Less than 20%	28.1%	28.9%
20-34.9%	67.1%	34.1%
35% or more	32.9%	36.9%
<b>Owner Housing Costs as Percent of HH Income</b>		
<b>With Mortgage</b>		
Less than 20%	37.3%	36.2%
20-34.9%	20.8%	42.1%
35% or more	23.5%	21.7%
<b>Without Mortgage</b>		
Less than 20%	70.0%	61.5%
20-34.9%	15.8%	21.0%
35% or more	21.7%	17.5%

**TABLE 15 Selected Household Characteristics**

Source: U.S. Census, American Communities Survey, 2008-2012

<b>PHYSICAL HOUSING CHARACTERISTICS 2012</b>		
	<b>City of Olmsted Falls</b>	<b>44138</b>
<b>All Occupied Housing Units</b>	3,362	8,695
Total available units	3,655	9,487
Vacancy Rate - Owner units	1.6%	1.4%
Vacancy Rate - Rental Units	12.6%	10.6%
<b>Structure Type</b>		
Single Family Detached	64.0%	59.9%
Single Family Attached (cluster and townhomes)	20.7%	9.8%
Multi Family 2 units	9.0%	9.0%
Multi Family 3-4 units	1.3%	1.7%
Multi Family 5-9 units	2.1%	5.8%
Multi Family 10+ units	10.9%	10.2%
Mobile Homes	0.0%	11.8%
<b>No Separate Bedrooms</b>		
No Separate Bedrooms	0.6%	1.0%
1 Bedroom	8.1%	7.8%
2-3 Bedrooms	65.5%	63.5%
4+ Bedrooms	25.8%	27.6%
<b>Age of Structure in 2012</b>		
2010+ (0-2 yrs old)	0	0
2000-2009 (3-12 yrs)	13.8%	20.4%
1980-1999 (13-32 yrs)	33.4%	38.3%
1960-1979 (33-52 yrs)	31.9%	24.0%
1940-1959 (53-72 yrs)	14.5%	11.0%
before 1939 (over 72 yrs)	6.4%	6.2%
<b>Owner-Occupied Home Values 2012</b>		
Less than \$50,000	0.9%	12.0%
\$50-99,999	15.1%	10.4%
\$100-149,999	32.3%	22.4%
\$150-199,999	28.1%	22.0%
\$200-299,999	19.3%	27.7%
\$300-499,999	3.2%	4.4%
\$500-999,999	0.5%	0.8%
More than \$1 Million	0.6%	0.4%
Median Home Value	\$ 152,000	\$ 160,300
<b>Gross Monthly Rent in Rental Units 2012</b>		
\$0-299	0.0%	0.0%
\$300-499	1.3%	1.8%
\$500-749	53.4%	22.4%
\$750-999	18.8%	42.6%
\$1000-1499	26.4%	19.2%
More than \$1500	0.0%	14.0%
Median rent	\$ 735	\$ 881

**TABLE 16 Physical Housing Characteristics**

Source: US Census, American Communities Survey 2008-2012



**New Homebuyers.** According to our interviews of realtors, the Olmsted Falls market area enjoys a steady stream of residential homebuyers, falling into three categories: families within the Olmsted Falls City School District who are “moving up”; families from the region, moving in to take advantage of the schools while gaining “more house for the dollar”; and mature adults who are attracted by the small community, and proximity to families.

The percentages of these segments of the market, according to interview, fall out roughly as follows:

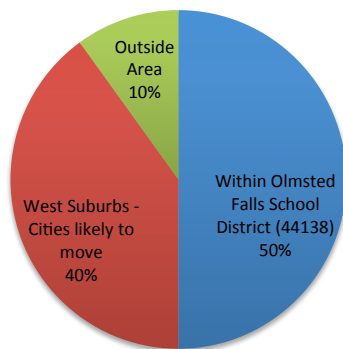
- 80% families with children
- 20% empty nesters: clusters, townhomes, good quality manufactured homes

And:

- 50% move-up within Olmsted Falls
- 40% western suburbs
- 10% outside of region and some out of state

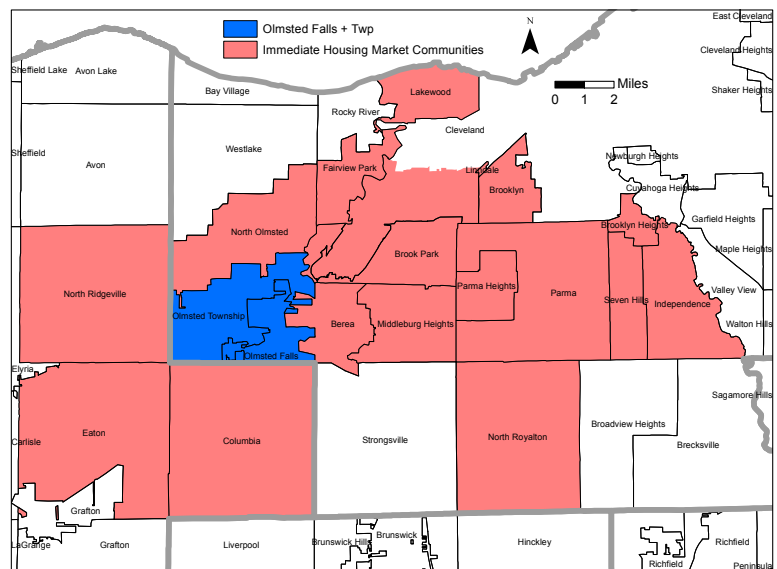
Based on these rough numbers, the housing market area can be mapped as shown. Sending suburbs were identified as those that had school districts with lower ratings than Olmsted Falls, were in the vicinity of Olmsted Falls (“western suburbs”), and provided lower perceived housing value (size for the price) compared to Olmsted Falls. The identified communities were confirmed with realtor interviewees as typical for the buyers they encounter.

### Olmsted Falls Housing Market



### Housing Market Sending Suburbs

Source: Realtor interview, CSU CCPD



HOUSING NICHE ANALYSIS - BY PRICE POINT		DEMAND: HOUSEHOLDS		SUPPLY: OWNED UNITS		SUPPLY: RENTED UNITS		SUPPLY: ALL UNIT TYPES			NET DEMAND						
INCOME RANGES		Total HH 44138	Total HH in Range +10% Secondary Demand	Income range x 3 = housing price affordability range 2012		SUPPLY - 44138		Price Range Rent 2012		SUPPLY - 44138		SUPPLY: ALL UNIT TYPES		NET DEMAND			
Income Range 2012	Income Range 2012 ACS	Low	High	Low	High	Owner Occupied Units, 44138	Vacant Units, 44138	Renter Units 44138	Occupied Units 44138	Vacant Rental Units 44138	Price Range Rent 2012	Low	High	Total Supply 44138	Total Demand 44138	Gap: Total Supply - Demand 44138 + suburbs	Gap: Total Supply - Demand 44138 only**
Total HH	8,695	8,695	363	\$ -	\$ 29,997	272	4	9	9	354	13	367	3	36			
Less than 10,000	330	330	373	\$ 10,000	\$ 14,999	544	8	0	0	544	8	552	179	213			
10,000-14,999	817	817	899	\$ 15,000	\$ 24,999	355	5	3	3	387	8	395	(504)	(422)			
15,000-24,999	696	696	765	\$ 25,000	\$ 34,999	355	5	43	43	761	48	808	43	113			
25,000-34,999	1,061	1,061	1,167	\$ 35,000	\$ 49,999	1,523	21	82	82	2,293	103	2,396	1,229	1,335			
35,000-49,999	1,696	1,696	1,865	\$ 50,000	\$ 74,999	1,496	21	37	37	1,844	58	1,902	37	206			
50,000-74,999	1,278	1,278	1,406	\$ 75,000	\$ 99,999	1,882	26	27	27	2,135	53	2,188	782	910			
75,000-99,999	1,774	1,774	1,951	\$ 100,000	\$ 149,999	301	4			301	4	305	(1,646)	(1,469)			
100,000-149,999	496	496	545	\$ 150,000	\$ 199,999	11	0			11	0	11	(534)	(485)			
150,000-199,999	209	209	230	\$ 200,000	-	66	1			66	1	67	(163)	(142)			
over 200,000																	
TOTALS	8,695	8,695	9,565			6,804	95	200	1,891	296	8,695	296	8,990	(574)	295		

## Housing Niche Analysis

A niche analysis was performed using US Census data for the market area to delineate the demand and supply for both rental and buyer housing.

As indicated, there is a net supply of homes overall in the market area, which shifts to net demand when buyers from outside the market are taken into account. The analysis indicates that there is market demand in particular for homes over \$300,000, based on income of existing households.

It is important to note that this analysis is based on the general national trend of households spending 3 times their annual income on their home (equivalent cost = 30% income, including debt service, insurance, property tax, maintenance and utilities). National trends do not necessarily reflect individual or local choices. However, the income-housing cost information in the Households table indicates that many households in the market area do indeed choose to spend close to 30% of their income on housing costs.

**TABLE 17 Housing Market Niche Analysis**

Source: US Census; CSU CCPD

**Home Sales in the 44138 Market.** The 10-year housing market sales table shows that home sales have continued steadily over the last 10 years, and that sales in 2013 were higher than the average annual sales for the last 10 years, at 287 sales vs. 253 average (219 average for the last 5 years). This may reflect pent-up demand from the previous recession, but also indicates a steady, stable market for sales of existing homes.

10-YEAR HOUSING MARKET AREA SALES 2004-2013 (Zip Code 44138)					
Price Range	Total Sales 2004-2013	Avg Annual, 2004-2013	Total Sales 2009-2013	Avg Annual 2009-2013	2013
Less than \$50,000	81	8	69	14	20
\$50-99,999	368	37	200	40	45
\$100-149,999	780	78	356	71	96
\$150-199,999	693	69	246	49	64
\$200-299,999	545	55	203	41	55
\$300-499,999	65	7	20	4	7
\$500-999,999	1	0	0	0	0
More than \$1 Million	0	0	0	0	0
<b>Total</b>	<b>2,533</b>	<b>253</b>	<b>1,094</b>	<b>219</b>	<b>287</b>

Source: Cuyahoga County Auditor Transfer files

Note 1 : does NOT include transfers under the following deed types:

deed(1), quit claim (29), refile (1), sheriff (29), warranty-part interest (1)

Note 2: includes only transfers of at least \$10,000

Note 3: does not include purchases by bank, institutions, etc.

Note 4: only includes transfers for which the building value is > \$0

**TABLE 18 Housing Market Area Sales 2004-2013**

Source: Cuyahoga County Auditor

**National Homebuying and Development Trends.** The National Association of Realtors’ series on Smart Growth, “On Common Ground”, has two recent issues which focus on topics relevant to small communities such as Olmsted Falls. The Summer 2013 issue, “Small Towns and Rural Places”, notes:

“Survival of small towns as a whole is significant because they are the kinds of places where development makes sense.... Small towns are typically compact and generally walkable. They have authentic neighborhoods, distinctive business districts and a strong sense of place. And they have the capacity to focus growth where services and infrastructure already exist.”(p.5)

and:

“...we’re seeing young families that moved away coming back. They want their children to grow up in a small town where they can walk to school and ride their bikes to the park.” (p.7)

“Adding residential to the downtown mix is good for business and - because downtown is attracting older residents moving from elsewhere around the city – it’s building school enrollment by putting more family homes on the market.” (p.7)

The Winter 2014 Issue, “Development Update, includes results of the 2013 Community Preferences Survey:

“Americans made two things very clear in the latest biennial Community Preference Survey by the NATIONAL ASSOCIATION OF REALTORS® (NAR). They want to live in walkable neighborhoods, and they care more about neighborhood than house size when deciding where to live.” (p.24)

“Given the focus on neighborhood, the question becomes what kind of neighborhood do people prefer most? According to the survey, it’s a suburban neighborhood with a mix of houses, shops and businesses. The kind of neighborhood they prefer least? A suburban neighborhood with houses only. (p.24)

“Those findings are among several survey results that show an affinity for mixed-use, walkability, compact development and other characteristics of smart growth. The September 2013 survey of 1,500 people was conducted for NAR by American Strategies in conjunction with Myers Research and Strategic Services.” (p.24)

**Existing available supply of lots.** Information from the County Auditor’s office and the City of Olmsted Falls shows that there are currently 155 planned and platted lots, many of which have roads and utilities complete. As shown in the New Home Construction Permits table, the average annual building permit rate has been 1.5 per year since 2009. The rate for the last 14 years was highest in 2001 at 79 homes in that year; after that it began dropping, with the average annual rate at 36 homes per year from 2001-2008. This information indicates that the City may want to monitor the pace of construction permits in the future, and consider carefully the need for more platted lots to meet the housing need.

However, given the desire on the part of the “new buyer” for walkable communities, it may be worthwhile to explore allowing the platting or re-platting of parcels within ¼ mile of the downtown to provide a more desirable neighborhood housing product. This would require more in-depth housing market analysis, and collaboration/communication with developers and property owners.



NEW HOME CONSTRUCTION PERMITS, CITY OF OLMSTED FALLS, 2001-2013	
2001	79
2002	61
2003	50
2004	14
2005	23
2006	14
2007	10
2008	1
2009	3
2010	1
2011	3
2012	0
2013	1
<b>Avg Annual 2001-2007</b>	<b>36</b>
<b>Avg Annual 2008-2013</b>	<b>1.5</b>

**TABLE 19 New Home Construction Permits 2001-2013**

Source: City of Olmsted Falls

PLANNED AND PLATTED LOTS IN OLMSTED FALLS			
Project Name	Unbuilt Units as of 3/2014	Year Approved	Status
Villas of Falls Pointe II	53	Jan-04	Roads/utilities complete
Falls Glen Phase I	14	Mar-05	Roads/utilities complete
Falls Glen Phase II	17	Mar-05	Conceptual stage, no approval
Falls Pointe Phase 5A	32	Sep-03	Roads/utilities complete
Falls Pointe Phase 5B	39	Sep-03	Conceptual stage, no approval
<b>Total</b>	<b>155</b>		
Note: Falls Pointe Phase 5B are attached units; all others are detached			

**TABLE 20 Available Supply of Building Lots**

Source: City of Olmsted Falls

## CONCLUSIONS

In comparison with other thriving historic downtown areas, it is apparent that capacity exists to add to the specialty retail and professional office space in the downtown; and that in the long run, a Bed and Breakfast should be successful. Housing analysis also shows that there is capacity in the housing market for increased higher-end housing products; and national data indicate that walkable residential neighborhoods could attract millennial families. These opportunities will help to increase the critical mass of shops and activities that will draw people to the downtown, and increase the presence of residents and workers in the downtown, in addition to visitors from outside the City.

*However, it will be imperative that the City pursue partnerships and projects in the near and long term to ensure that a regional trail connection, train museum/attraction, performing arts opportunities, and strong bicycle and functional connections to Baldwin Wallace University, are in place to provide visitor growth to support existing and future businesses in the downtown.*

### Specific Recommendations

Based on survey and interview input from visitors, residents, merchants, and realtors, and the market analysis performed above, the following recommendations are made. See the Opportunities Map below for locations. These are not given in any particular order; priorities should be set by the economic development committee, with input from the community

- *Continue to convene an economic development committee* made up of private and public partners to pursue projects to enhance the downtown business environment and visitor draw
- *Facilitate meaningful discussion with the community* as a whole, through a charrette process or other discussion framework that allows longterm residents, businesses and other stakeholders to participate in determining priorities and focus areas for the future
- *Work with the Cleveland Metroparks* on long-term plans for a trail link connecting the Olmsted Falls downtown, Mill Creek reservation, and/or Rocky River Reservation
- *Develop an urban design plan* for the downtown that can address downtown identity and vibrant sense of place, and the need for coherent pedestrian flow and walkability, visitor attraction and accommodation, retail visibility and signage, pedestrian and traffic safety. This plan could also look at vacant and available sites in the downtown, and their use for the long term.
- *Work on solutions to address limited liquor license capacity* to support restaurants
- *Enhance bicycle and pedestrian connections* between residential neighborhoods and the downtown, and especially Baldwin-Wallace college

- Explore long term opportunities to *develop a venue that could attract train enthusiasts*, perhaps utilizing the depot as a centerpoint, and taking advantage of the adjacent City service yard and connection to Columbia Road business area
- Explore opportunities for marketing of a *greenhouse and gardening cluster* in the Olmsted Falls area
- Explore opportunities for *modest expansion in retail and office capacity* downtown
- Explore opportunities to *integrate small-scale overnight lodging* (such as Bed and Breakfasts) into the downtown
- In conjunction with the merchants association, work to *enhance the business environment and increase shopper traffic* by addressing typical Main Street issues such as marketing/branding, advertising, coordinated hours and business guidelines, business retention, diversity of business types, filling vacancies, and coordinated events
- Continue to *focus on local, unique businesses* and property owners as the centerpoint of economic development strategy
- Seek and support *opportunities for new and redeveloped housing, and enhancement of existing neighborhoods* in the downtown vicinity that meet a higher-end market, and/or provide walkable neighborhood living for new millennial families

### Caveats and Limitations

While this study has made an attempt to use methodical analysis to identify Olmsted Falls' strengths and challenges, to identify possible market opportunities in the retail environment, and to generate ideas and opportunities for business expansion, it should be noted that there is no guarantee that any business or enterprise will succeed. There are many factors that contribute to the success of a business; a preliminary market analysis is only one of them.

It should be noted that small sample sizes were available for the surveys and interviews, and these analyses were not statistically sampled and analyzed. A wide margin of error could result. Similarly, the best available data in many cases dates to 2007 to 2009 prior to the current economic scenario; or was national or state level, which may not directly apply to the specific Olmsted Falls area. As noted in the text, there were discrepancies in downtown square footages between the County Auditor's quantities and CSU's measured quantities. All of these conditions could likely indicate a wide margin of error.

The historic downtown comparative study was an innovative attempt to find common factors that would enable a comparison of downtown retail and office capacity. To our knowledge there is no national or standardized data available on these factors, and no accepted method for making such measurements. This project was therefore experimental and preliminary, but does indicate directions for further study. It would be interesting to continue this study with more detailed assessment of downtown characteristics, improving potential accuracy, reducing margin of error, and expanding the number of towns compared.

Finally, the influence of web-based purchases on various categories of retail expenditures is constantly changing, and very difficult to measure with reliability at the local-regional level.

For all of these reasons, it is recommended that the City use this information as a source of general trends and opportunities, while working with individual businesses and entrepreneurs to do their own specific market analyses as appropriate for their product or service.



## REFERENCES

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## **APPENDIX**

### **A. DOWNTOWN SURVEY RESULTS**

A PDF including the results of the downtown survey, generated by the Qualtrics software utilized by CSU, is attached at the end of this report. See the next Appendix section for a summary of key findings, including open-ended responses.

## B. DOWNTOWN SURVEY FINDINGS

Respondents: respondents were reasonably diverse.

- 129 total respondents
- 33(34%) male, 64(66%) female
- A third were aged 31-50; a third 51-65; and 25% 65 and over; 5% 20-30, and 3% preferred not to say.
- Half live within the City, and half do not. (49%-50%).

Visiting Olmsted Falls: highest responses for each category.

- Convenience grocery: 34 2 or more times; 31 once/week.
- Other retail shopping: 41 every few months; 18 once a month; 11 two or more times per week.
- Arts events: 41 every few months; 39 never.
- Other events: 39 every few months; 34 never.
- Restaurants full service: 41 once every few months; 31 once a month
- Restaurants fast service: 27 once every few months; 36 never.
- Religious services – 13 once/week, 63 never
- Personal care: 11 once/month, 15 once/few months
- Professional services: 10 once/few months, 78 never
- Work: 21 2+/week
- Tourism: 32 once/few months, 15 once/month
- Visiting: 26 2+/week, 18 once/few months
- Passing through: 53 2+/week

City and Competitors/Standard Retail: Reasons for shopping at the following: (highest count responses)

- Olmsted Falls – 59 Better location; 48 Unique products; only 7 of 172 do not shop/dine here.
- Olmsted Falls Township – 29 Better location; 39 do not shop/dine here.
- Great Northern Mall – 58 better selection; 31 better location; 28 better hours; 27 better parking; 21 better price.
- Berea: 25 better location; 31 better selection; 21 unique products.
- North Olmsted: 41 better selection; 28 better location; 23 better parking
- North Ridgeville: 73 do not shop/dine here; all others under 10.
- Strongsville: 38 better selection; 18 better parking; 17 better location.
- Westlake: 32 better selection; 24 unique products; 40 do not shop/dine here

Historic towns: reasons for shopping (highest count responses)

- Vermilion: restaurants 16; community events 14
- Amherst: 7 restaurants; 4 visiting friends/family
- Grafton: 7 restaurants; 4 community events.
- Wellington: 11 visiting friends/family; 8 community events.
- Medina: 30 restaurants; 23 unique products; 18 community events.
- Peninsula: 18 nearby recreation; 13 restaurants
- Chagrin Falls: 15 restaurants; 14 unique products
- Twinsburg: 6 visiting friends/family; 4 restaurants
- Willoughby: 8 restaurants; 5 visiting friends/family
- Chardon: 4 community events; 3 restaurants; 3 unique products

- Hudson: 15 restaurants; 8 community events; 8 visiting friends/family
- Kent: 6 community events; 5 restaurants
- Lakewood: 21 restaurants, 10 community events
- “Do not visit” ranged from 36 to 82 for all towns. Medina had the most visitors.

#### Housing:

- Of those who live here, 72% expect to live here over 10 years; 20% 5-10 years; 8% under 5 years.
- Of the 34 non-residents who responded, they were evenly split between those who would consider living here and those who would not.
- Desirable new housing was spread among all types. 30% wanted no new housing; 20% wanted to upgrade existing housing; 23% wanted new single family homes; 23% wanted mature adult housing; 10% townhomes; 5% apartments; 10% condominiums. (respondents could make multiple selections).
- If public transportation were available for visiting the downtown, 62% would not use it, and 33% would

#### What people like best about visiting Olmsted Falls:

- most common words: restaurants, small town feel, community, historic, unique, quiet, character, convenient, friendly

#### What other stores/features would you like to see in Olmsted Falls?

- Bakery, market, more wearable art
- Daycare, quick foods
- Drive throughs, bakery
- Better care of Grand Pacific Junction
- Restaurant
- Rec Center
- Better restaurants
- Family sports bar and grill, dining over the falls
- A rec center with more capacity and features of the current community center. Indoor pool, more basketball courts, racketball, etc.
- Clothing, hardware, fishing
- More parking, unique museum along with a welcome center and all businesses listed as places to visit and purchase from
- Better grocery selection, light industry for tax purposes
- Wendy’s
- Deli, bakery
- A historical museum would be pretty awesome!
- Not really sure at this time other than another type of restaurant
- More specialty restaurants. Would love to see a High End restaurant, especially with the park and river nearby. The Falls Park and GPJ are two of the best features of Olmsted Falls, and the park needs to be better utilized. New bathrooms are a must, and more space for both parking and activities.
- Nice to have a YMCA or a small affordable gym, hair salon, local nature hikes/lectures. Prefer to keep small town feel.
- Less “old town” stuff. Parking, parking, parking
- Unique finds that I can enjoy with my family

- More bar/restaurants
- Lodging
- A decent grocery store that is not Giant Eagle, more restaurants
- Quaintness if its best feature – put a grocery store/hardware store close to downtown, but not in it
- More mid-range restaurants and better shopping selection
- The junction has too many of the same nicky-nacky stores. Arabica should have been included in the strip or maybe put it where the library was. People want a place to sit and relax and stretch out after a long winter. The food selection is sparse and way overpriced for the quality! I'll be surprised if Fazio's makes it through the summer with the worst food and service I've ever experienced. I live in OF and want to see it thrive, but you placed 2 insurance companies side by side, a doll store, and a music store that's been there 100 years. Take a walk down Detroit and Warren and you can see the buzz and uniqueness and variety that brings people of all ages.
- Restaurants
- More restaurants
- Not sure
- No chachke. Who needs that? Something people need (drug mart like for example). Park nature center would be nice with educational seminars, classes, products to enhance properties for recycle, nature, cooking classes with local foods, outpost for Polaris mini classes, multigenerational events: folk stories, community celebrate neighborhoods, board game challenges, get it???
- Medical/professional
- Grocery store
- Deli and/or bakery
- Nothing in particular – we need more people than the 18000 to make retail work here
- Clothing, resale
- Fast food
- Community swimming pool
- None
- Heinen's
- Old town feeling
- Garden center
- Organic food stores
- Art, jewelry
- Toy shoppe/game store, festivals
- Like the addition of a coffee shop
- Grand Pacific Junction – less insurance companies more specialty shops – more parking
- More restaurants, Walgreens, shops especially in downtown
- Recreation center
- More street landscaping, finish character street lighting, more landscaping in street-tree lawns
- More restaurants and bars; something to bring people in; better store hours
- Adult week end events, art shows, progressive party@ restaurants, wine tasting, beer fest in October
- Family restaurants, additional fast food, target, kohls, walmart, hardware
- A chain restaurant – ex. Chipotle, Jimmy John's
- "Quick" foods (not "fast" food chains, but easy in/out and tasty foods) and unique boutiques



- more family dining options. Sit down pizza place similar to Sweet Basil in Westlake
- More options of stores and dining
- Chain or family style restaurants
- A heinens grocery store. The ability for restaurants (not necessarily bars) to serve alcohol on Sunday so that they stand a better chance of thriving and being attracted to open in the Falls
- Nice winery
- Would like to see major businesses here to lower taxes
- More parking, senior housing, new senior facility
- Better parking
- Senior transportation
- Senior apartments, reasonable transportation
- Bakery
- Senior living, senior transportation, better senior center
- Transportation, bakery
- More information on events and special sales.
- City needs to invest in downtown revitalization.
- We need better facilities for the seniors to come together. We need more transportation opportunities for seniors. We need a facilitie that is accessible for seniors in a disaster, especially when there are no relatives in the area. If we merge with SW hospital for dispatch that the Are You OK program will continue. More funds for extended programs for seniors.
- Usher road should have sidewalks that one could walk to Bagley Rd to the shopping center.
- Better senior transportation.
- Visually impaired – need transportation.

*Key Issues:*

- *People appreciate the small town feel, there is a desire to stay that way*
- *Restaurants, restaurants, restaurants come up again and again as desirable*
- *Restaurants and community events are key attractors for other small towns*
- *Primary reason for going elsewhere for mainstream shopping is selection and convenience*
- *People have offered a wide range of interesting ideas*
- *Accessibility is a concern: sidewalks, parking*
- *There is demand for people to live here who don't right now*
- *The majority of residents intend to live here a very long time*
- *There is a desire for a range of housing types*

## **C. MERCHANTS SURVEY FINDINGS**

Due to the confidential nature of the survey, specific findings are not included in this report, and responses will not be disclosed by the CSU researcher. However, key findings are summarized below.

### **Respondents**

- 13 participated, representing a range of business types – restaurant, gift, professional services, and various specialty shops.

- Of the 13, 3 answered all questions, including financial information; an additional 6 answered all questions except the financial information.
- Respondents were about evenly split between less than 5 years, 5-10 years, and 10-20 years' tenure.
- 75% were owners of the businesses; 17% were managers; and 8% were other.
- Again, evenly split between being in that position less than 5 years, 5-10 years, and 10-20 years. One person had been in their position more than 20 years.

#### Store characteristics

- All are located inside the City.
- Store sizes range from 800 to 3800 square feet.
- 11% own their building, 89% lease.

#### Customers:

- Number of customers on a normal day ranged from 5 to 200. The mean was 45; the median was 20.
- Walk-in customers ranged from 5% to 100%.
- Repeat business customers ranged from 45% to 100%.
- Percentage of Local customers fell in three groups: 10%; 50-60%; and 90%.
- Percentage of NE Ohio ranged from 5% to 80%.
- Percentage of customers outside the region ranged from 10 to 25%.

#### Parking:

- 3 of 7 said their customers don't have adequate parking; 2 said they do; and 2 said both yes and no, with comments. Comments included:
- heritage days is a huge challenge to parking issues
- parking is not the biggest issue
- sometimes yes, sometimes no.

#### Competitors listed included:

- Uncle Al's Bagley Rd
- Dairy Queen, Berea
- Giant Eagle in North Olmsted
- Crooked River Creations
- State Farm, Allstate, Farmers
- Jojo's, Cook Rd
- Barbarino's, Sprague Rd
- Clementines

#### Complementary Olmsted Falls businesses include:

- Music Box
- All restaurants
- Moosehead
- Clementines
- Grand Pacific Junction
- Angelina's Pizza
- Taqueria Junction
- Mary's Hair Salon,
- Abigail's Quiltery

#### What makes your store more competitive? (majority rating)

- Service, unique products, quality, selection were rated "a lot" by 8 or 9 out of 9.

Price point: all noted that they are "average".

What else they would like to see:

- Space for 40-100 to have a party or hold meetings
- Jimmy Johns
- A deli
- Sit down Italian restaurant
- Apparel

Suggestions for improvement;

- Business owners who don't keep posted hours
- Too much insurance
- Signage is needed – shoppers who come in the back way have no idea that stores are here
- Need more reasonable rents
- Need more media attention as a city and historic district
- It needs to continue to thrive...we feel there is a great base but moving onward seems to be a problem with turnover.

*Key issues:*

- *Signage and lighting are biggest issue*
- *"getting the word out" in digital age when advertising is expensive*
- *Viability of businesses, reducing turnover*
- *Parking less of an issue than one would think*
- *Accessibility for mobility-impaired customers*
- *Need to increase number of stores to gain critical mass – hours are a component of this, need a critical mass of consistently open stores at peak hours*
- *Strong businesses focus on excellent customer service and financial stability*
- *Desire to increase diversity of stores*

#### **D. MERCHANT/REALTOR INTERVIEW FINDINGS**

Informal interviews were conducted in person and by telephone for six merchants and two realtors. (one of the merchants was also a realtor). Key findings are as follows:

Olmsted Falls advantages: (for buyers/customers)

- Good schools
- Historic downtown with specialty shops
- Creek landscape right in downtown
- Train appeal
- Small town appeal
- Wedding/event facilities/amenities

Olmsted Falls disadvantages: (for buyers/customers)

- Freeway, train and plane noise
- Train tracks used very often through middle of retail area
- Busy traffic on Columbia Road
- Lack of parking in downtown
- High property taxes

#### Olmsted Falls advantages for merchants:

- Historic downtown
- Complement of businesses attract customers
- Potential for the future, needs to be capitalized on
- Traffic counts on Bagley and Columbia Rd

#### Homebuyers:

- 80% families with children
- 20% empty nesters: clusters, townhomes, good quality manufactured homes
- 50% move-up within Olmsted Falls
- 40% western suburbs
- 10% outside of region, even state

#### Housing needs:

- 3 BR affordable homes for single parents with children
- more clusters for empty nesters?

#### Retail strengths:

- local buyers come for good service/personal attention, unique higher quality products
- regional buyers will come for small town character, critical mass of unique shops, train and craft interests, complement of restaurants
- Wedding clientele attracted by high quality historic unique facilities, picturesque outdoor venues
- Shops complement each other
- High traffic on Columbia and Bagley Rds

#### Retail needs:

- Signage and lighting are the greatest need, create a sense of destination at night and in daytime
- Help with advertising all around – help with reaching shoppers and standing out in cluttered, diverse digital environment, getting on the right lists, etc.
- Coordinated, cooperative effort in putting on events and programming, advertising
- Small business consulting for some retail businesses without expertise to help them to be successful, last longer: 1) expand hours; 2) understand capital needs; 3) improve customer service
- More businesses that appeal to men, families
- An anchor that would keep people here for a whole day – museum, train venue, major park connection, historic tours, etc.
- More businesses that would appeal to millennials: hat store, soda fountain, quality candy, etc. – perhaps visit Tremont/Ohio City/Oberlin/Lakewood/others in Trader Gazette and identify possibilities.'
- More businesses that would appeal to “meat and potatoes” set: not upscale.
- Explore design possibilities for drugstore and historic shops that appeal to millenials – better lighting, more trendy themes.
- Expand parking. It’s a real impediment.
- Better parking/access for handicapped and mobility impaired, dropoff areas, clear sidewalks, ramps.
- Expand patio dining opportunities.

- Coordinate hours of operation to provide best experience for customers; encourage open hours during peak periods (lunchtime, late afternoon-evening) to maximize vibrancy of area.
- Need a good anchor restaurant at GPJ's that can be successful – with enough capital, good advertising, good chef, good customer service.

Other Ideas:

- Use service area to expand trail connections, train connection, park connection, pedestrian bridge
- Capitalize on the falls
- Explore retail, patio dining, cluster homes for library site
- Explore cost of moving library and community center buildings
- Explore walkability/access to existing homes – sidewalks/bikeway/connections improvement?
- Explore overnight stay/bed and breakfast.
- Explore small office uses? Upstairs etc?
- Look at design of spaces between shops to encourage lingering, patio dining, traffic routes to all businesses.
-



## E. DOWNTOWN BUSINESS INVENTORY

Business Name	Address	Auditor's SF	Best Judgment SF	Measured SF	Niche/Subtotal	Shopping Ctr
Second Thyme Around	8153 Orchard St	2774	2774	1000	art/antiques	Grand Pacific Junction
						2774
Beetler's Auto Body	8061 Columbia Rd	10288	10288	1000	Auto svcs	
						10288
PNC Bank	8113 Columbia Rd	2465	2465	2811	bank	Drug Mart Shopping Ctr
						2465
Exquisite Nails	8149 Columbia Rd	-	2920	1386	Beauty/barber	Drug Mart Shopping Ctr
Depot Barber Shop	8076 Columbia Rd	-	1000	1200	Beauty/barber	Grand Pacific Junction
Mary's Hair Salon	8086 Columbia Rd	1436	1436	1300	Beauty/barber	Grand Pacific Junction
						5356
La Blanca Bridal Boutique	8080 Columbia Rd	-	1000	1000	Clothing and jewelry	
Keith Jewelers	8089 Columbia Rd	-	1521	2800	Clothing and jewelry	
						2521
Arabica Café	8143 Columbia Rd	-	2920	1386	coffee/tea/bakery	
						2920
GPI Merchants Assn	8082 Columbia Rd	-	-	-	community	Grand Pacific Junction
St. Mary of the Falls Office	25615 Bagley Rd	-	-	-	community	
Olmsted Community Church	7853 Main St	-	-	-	community facility	
Jenkins Senior Ctr	7932 Main St	-	-	-	community facility	
Cuy. Valley and West Shore Mc	25802 Garfield Ave	-	-	-	community facility	
Olmsted Falls Service Ctr	8051 Brookside	-	-	-	community facility	
Grand Pacific Wedding Chapel	7970 Columbia Rd	2908	2908	3123	Event Center	Grand Pacific Junction
Grand Pacific Hotel	8112 Columbia Rd	1536	1536	2200	Event Center	Grand Pacific Junction
Wedding Gardens and Cottage	8130 Orchard St	1000	1000	500	Event Center	
						5444
Cutting Garden	25561 Mill St	1400	1400	1041	florist	Grand Pacific Junction
						1400
BP Gas Station/Seven Eleven	8200 Columbia Rd	1344	1344	2256	gas station/convenience	Columbia Rd SW
Speedway Gas Station	8231 Columbia Rd	2325	2325	2499	gas station/convenience	
						3669
Discount Drug Mart	8191 Columbia Rd	-	33764	25390	general merchandise	Drug Mart Shopping Ctr
						33764
The Pink Bicycle Boutique	8078 Columbia Rd	-	1000	1200	Gifts/souvenirs	Grand Pacific Junction
ETC Down Under	8088 Columbia Rd	972	972	500	gifts/souvenirs	Grand Pacific Junction
Artist's Colony	8090 Columbia Rd	912	912	700	gifts/souvenirs	Grand Pacific Junction
Shamrock and Rose Creations	25576 Mill St	2320	2320	1000	gifts/souvenirs	Grand Pacific Junction
						5204
The Eye Place	8099 Columbia Rd	4563	1521	1386	health svcs	
Olmsted Falls Chiropractic Clin	8137 Columbia Rd	-	2920	1386	health svcs	Drug Mart Shopping Ctr
						4441
Allstate Insurance	8020 Columbia Rd	1943	650	500	insurance office	Grand Pacific Junction
Farmer's Insurance	8022 Columbia Rd	-	650	500	insurance office	Grand Pacific Junction
State Farm Insurance	25586 Bagley	-	548	668	Insurance office	
Monin Insurance Agency	25630 Bagley Rd	1709	1709	1336	Insurance office	Grand Pacific Junction
						3557
Master Cleaners	7994 Columbia Rd	-	430	430	Laundry/drycleaning	Grand Pacific Junction
Sunshine Cleaners	8125 Columbia Rd	-	2920	1386	Laundry/drycleaning	Drug Mart Shopping Ctr
						3350

### Olmsted Falls Downtown Business Inventory - Page 1

Source: CSU CCPD; Cuyahoga County Auditor (see notes at bottom of next page)

Business Name	Address	Auditor's SF	Best Judgment SF	Measured SF	Niche/Subtotal	Shopping Ctr
The Roberts Law Firm	7987 Columbia Rd	984	984	500	Legal Svcs	Grand Pacific Junction
						984
The Music Box	8062 Columbia Rd	2640	2640	2000	Other retail	Grand Pacific Junction
Crooked River Creations	25579 Mill St	1423	1423	1000	Other retail	
						4063
Falls Veterinary Clinic	8017 Columbia Rd	1544	1544	1145	Other Svcs	
						1544
A Time to Spa	25556 Mill St	896	896	800	Personal care svcs	Grand Pacific Junction
						896
Falls Family Photography	8072 Columbia Rd		1000	1000	Photography Svcs	Grand Pacific Junction
						1000
Ameriprint	8119 Columbia Rd	62952	2920	1386	Printing/office supplies	Drug Mart
						2920
Custom Property Mgmt	7992 Columbia Rd	-	500	500	Prof Svcs	
Parker Wealth Management	8022 Columbia Rd	-	650	500	Prof Svcs	Grand Pacific Junction
Myers/Lasch	8026 Columbia Rd	1910	1910	500	Prof Svcs	
Financial Guidance Group	8162 Columbia Rd	1462	1462	1041	Prof Svcs	
Edward Jones Investments	8167 Columbia Rd	-	2920	1386	Prof Svcs	Drug Mart Shopping Ctr
Turney Tax and Financial Service	25564 Bagley Rd	2686	2686	500	Prof Svcs	Grand Pacific Junction SW
Falls PC	25576 Bagley Rd	2065	1033	500	Prof Svcs	
Gengraphics	25576 Bagley Rd		1033	500	Prof Svcs	
Michael Brady Financial	25586 Bagley	1096	548	668	Prof Svcs	
						12742
Moosehead Hoof and Ladder #	7987 Columbia Rd	4190	4190	3500	Restaurant Full Service	Grand Pacific Junction
Falls Family Restaurant	8079 Columbia Rd		1521	2800	Restaurant Full Service	
Clementine's	8092 Columbia Rd	1216	1216	1700	Restaurant Full Service	Grand Pacific Junction
Le Bistro de Beaujolais	8134 Columbia Rd	1909	1909	1300	Restaurant Full Service	Grand Pacific Junction SW
Taqueria Junction	8154 Columbia Rd	1722	1722	1770	Restaurant Full Service	Grand Pacific Junction
Wok of the Falls	8185 Columbia Rd	-	2920	1386	Restaurants Full Service	Drug Mart Shopping Ctr
Angelina's Pizza	8155 Columbia Rd	-	2920	2773	Restaurants Full Service	Drug Mart Shopping Ctr
						12208
Abigayle's Quiltery	8096 Columbia Rd	1238	1238	1500	sewing/crafts	Grand Pacific Junction
						1238
Falls Ice Cream and Candy	8094 Columbia Rd		216	300	Specialty foods	Grand Pacific Junction
Kool Berry Yogurt	8131 Columbia Rd	-	2920	1386	specialty foods	Grand Pacific Junction
Jorgensen's Apiary	25546 Mill St	360	360	350	specialty foods	Grand Pacific Junction
						3496
Dolls and Mini's	8068 Columbia Rd	7740	2000	2000	toys/dolls	Grand Pacific Junction
						2000
VACANT	8070 Columbia Rd	-	1200	1200	vacant	Grand Pacific Junction
VACANT	25576 Bagley Rd		500	500	vacant	
VACANT	8074 Columbia Rd		1200	1200	vacant	Grand Pacific Junction
						2900
The Olde Wine Cellar	7990 Columbia Rd	2000	1070	1500	Wine/Beer/Liquor Sales	Grand Pacific Junction
						1070
Totals including vacant		139928	138404	100975		
Totals excluding vacant			135504	98075		
Vacancy			2.1%	2.9%		

Note: "Best Judgment" column was determined to resolve discrepancies between auditor's square footages and measured square footages, and to resolve buildings without auditor's square footages.

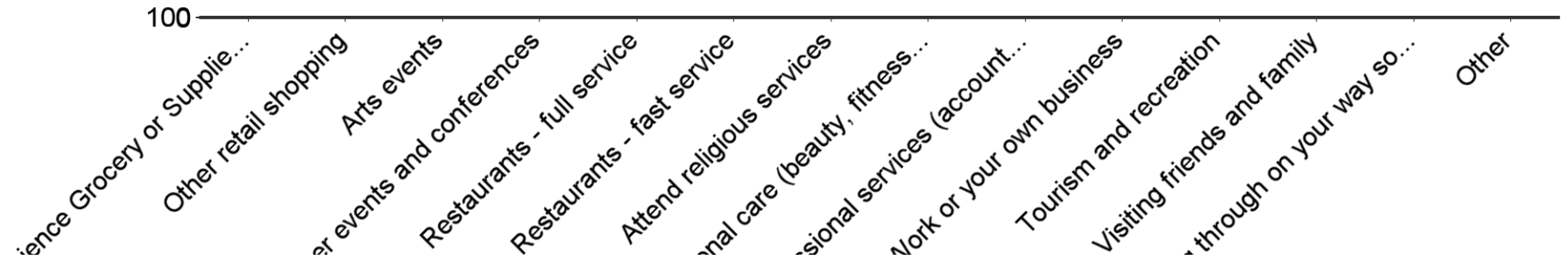
## Olmsted Falls Downtown Business Inventory - Page 2

Source: CSU CCPD; Cuyahoga County Auditor



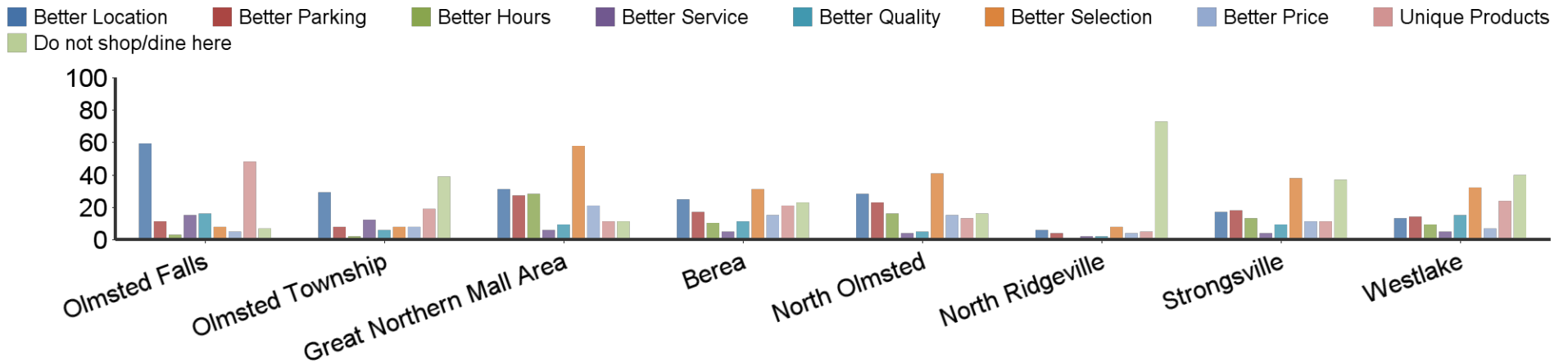
## 2. How often do you come to the City of Olmsted Falls for the following?

■ 2 or more times per week  
 ■ Once per week  
 ■ Once a Month  
 ■ Once every few months  
 ■ Never



#	Question	2 or more times per week	Once per week	Once a Month	Once every few months	Never	Response	Average Value
1	Convenience Grocery or Supplies Shopping	34	31	13	15	10	103	2.38
2	Other retail shopping	11	15	18	41	14	99	3.32
3	Arts events	2	2	8	44	39	95	4.22
4	Other events and conferences	2	3	17	39	34	95	4.05
5	Restaurants - full service	6	18	31	41	7	103	3.24
6	Restaurants - fast service	3	17	19	27	36	102	3.75
7	Attend religious services	5	13	6	14	63	101	4.16
8	Personal care (beauty, fitness, etc)	-	7	11	15	69	102	4.43
9	Professional services (accounting, insurance, etc)	2	2	7	10	78	99	4.62
10	Work or your own business	21	2	3	5	65	96	3.95
11	Tourism and recreation	6	10	14	32	36	98	3.84
12	Visiting friends and family	26	15	11	18	31	101	3.13
13	Passing through on your way somewhere else	53	8	5	9	21	96	2.34
14	Other	9	-	1	2	18	30	3.67

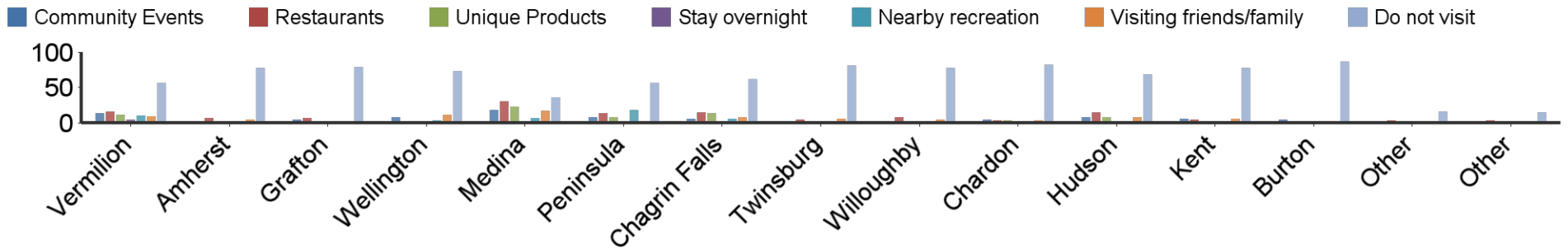
### 3. When you shop/dine at the following locations, what are the two main reasons why? (check two in each line)



#	Question	Better Location	Better Parking	Better Hours	Better Service	Better Quality	Better Selection	Better Price	Unique Products	Do not shop/dine here	Response	Average Value
1	Olmsted Falls	59	11	3	15	16	8	5	48	7	172	4.42
2	Olmsted Township	29	8	2	12	6	8	8	19	39	131	5.62
3	Great Northern Mall Area	31	27	28	6	9	58	21	11	11	202	4.55
4	Berea	25	17	10	5	11	31	15	21	23	158	5.25
5	North Olmsted	28	23	16	4	5	41	15	13	16	161	4.73
6	North Ridgeville	6	4	1	2	2	8	4	5	73	105	7.70
7	Strongsville	17	18	13	4	9	38	11	11	37	158	5.56
8	Westlake	13	14	9	5	15	32	7	24	40	159	6.01



4. Do you visit any of these historic towns? If so, what are the most important reasons to you for visiting them? (check all that apply)



#	Question	Community Events	Restaurants	Unique Products	Stay overnight	Nearby recreation	Visiting friends/family	Do not visit	Response	Average Value
1	Vermilion	14	16	11	4	10	9	56	120	4.92
2	Amherst	2	7	2	-	1	4	78	94	6.35
3	Grafton	4	7	-	-	2	2	79	94	6.31
4	Wellington	8	1	2	-	3	11	73	98	6.20
5	Medina	18	30	23	1	7	17	36	132	4.09
6	Peninsula	8	13	8	1	18	1	56	105	5.24
7	Chagrin Falls	6	15	14	-	6	8	62	111	5.32
8	Twinsburg	2	4	-	-	-	6	81	93	6.59
9	Willoughby	1	8	-	1	1	5	78	94	6.40
10	Chardon	4	3	3	-	1	3	82	96	6.42
11	Hudson	8	15	8	1	1	8	68	109	5.46
12	Kent	6	5	1	-	1	6	78	97	6.25
13	Burton	4	1	1	-	-	1	86	93	6.63
14	Other	2	3	2	2	1	2	16	28	5.39
15	Other	2	3	1	1	1	1	15	24	5.46

44017 44028 44035 44039 44070 44107 44111

44113 44130

**44138**

44142 44145 44149

**Text Entry**

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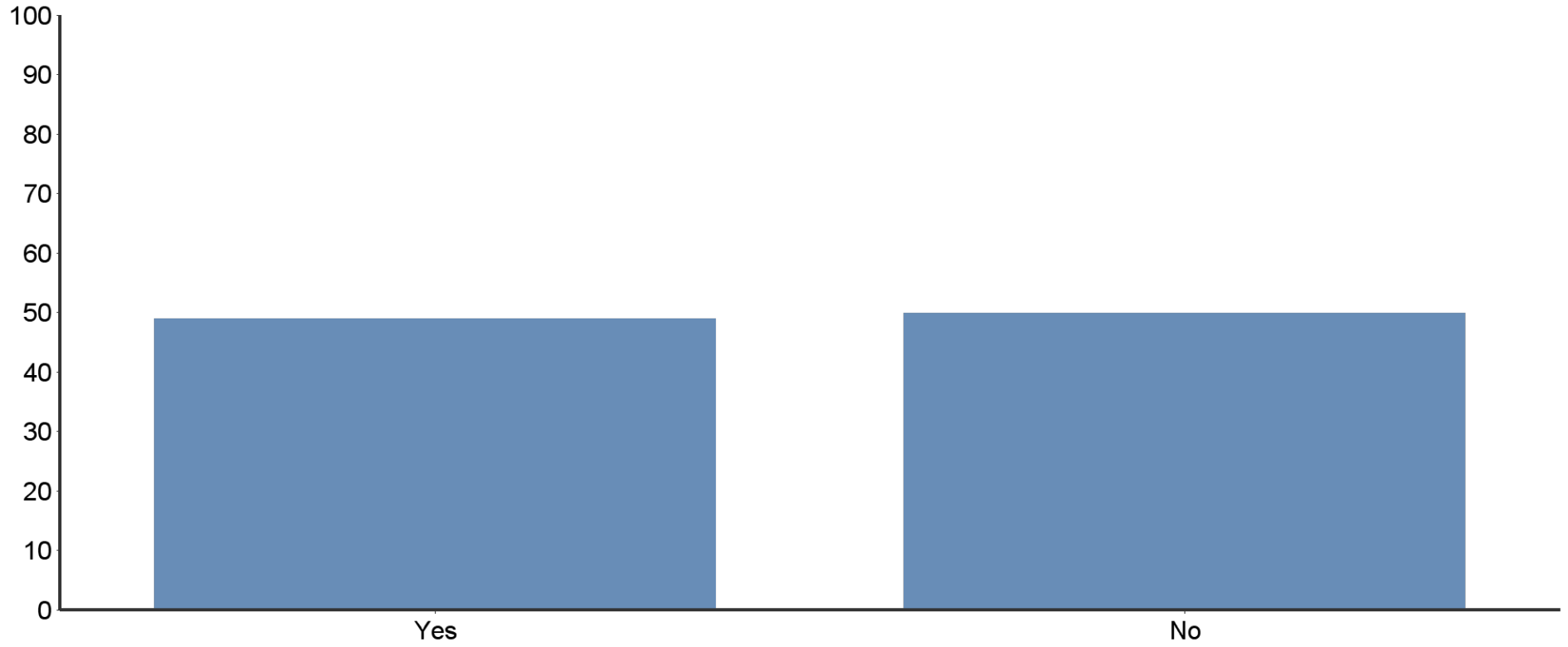
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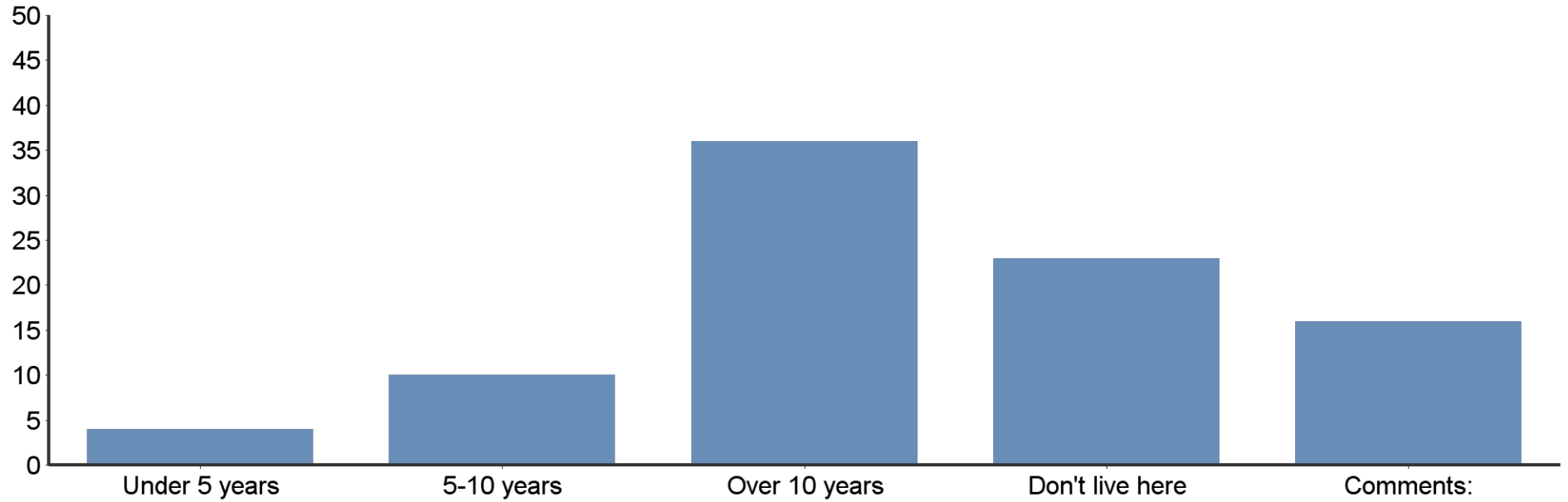
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6. Do you live within the City of Olmsted Falls?



#	Answer	Bar	Response	%
1	Yes		49	49.49%
2	No		50	50.51%
	Total		99	100.00%

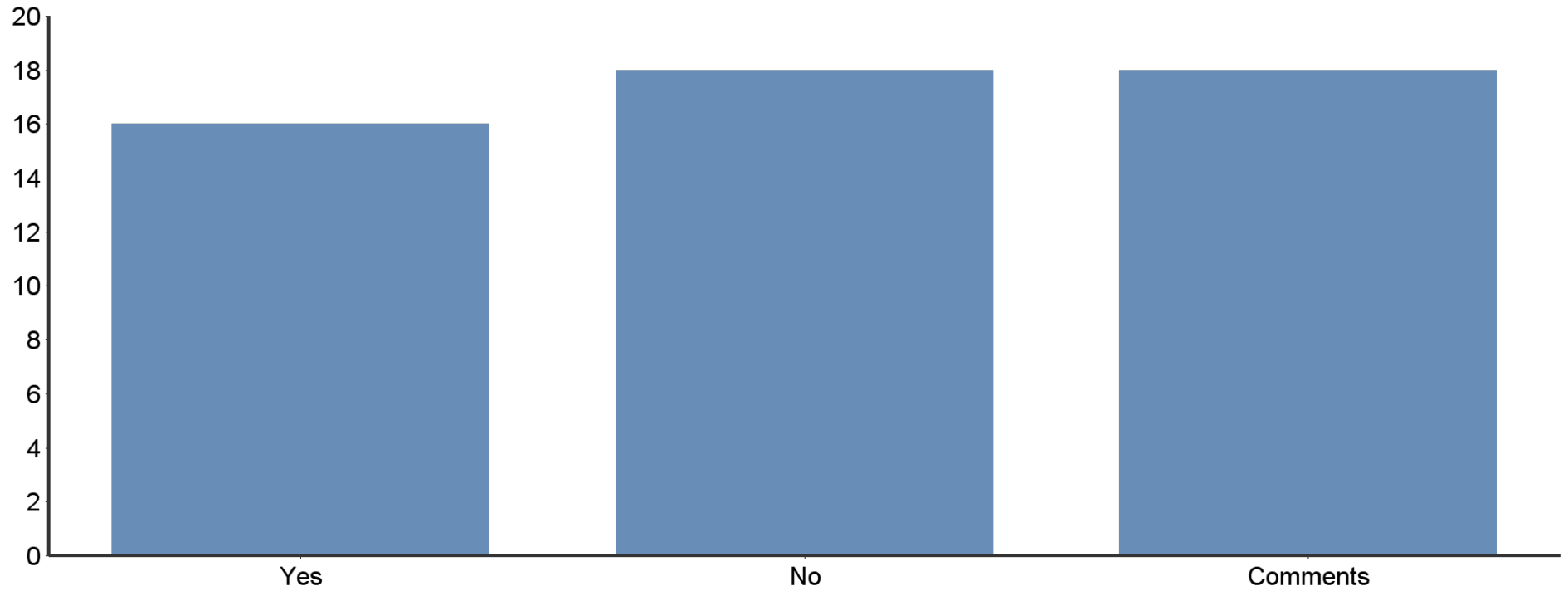
9. If you live in Olmsted Falls, how long into the future do you expect to live here?






#	Answer	Bar	Response	%
1	Under 5 years		4	5.19%
2	5-10 years		10	12.99%
3	Over 10 years		36	46.75%
4	Don't live here		23	29.87%
5	Comments:		16	20.78%
	Total		89	100.00%

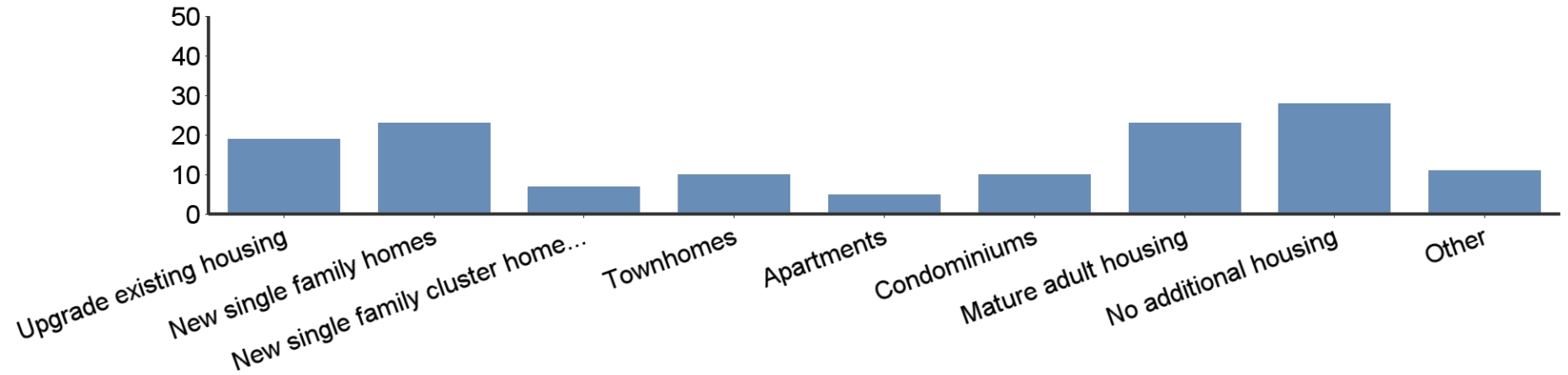


10. If you don't live in Olmsted Falls, would you consider living here?



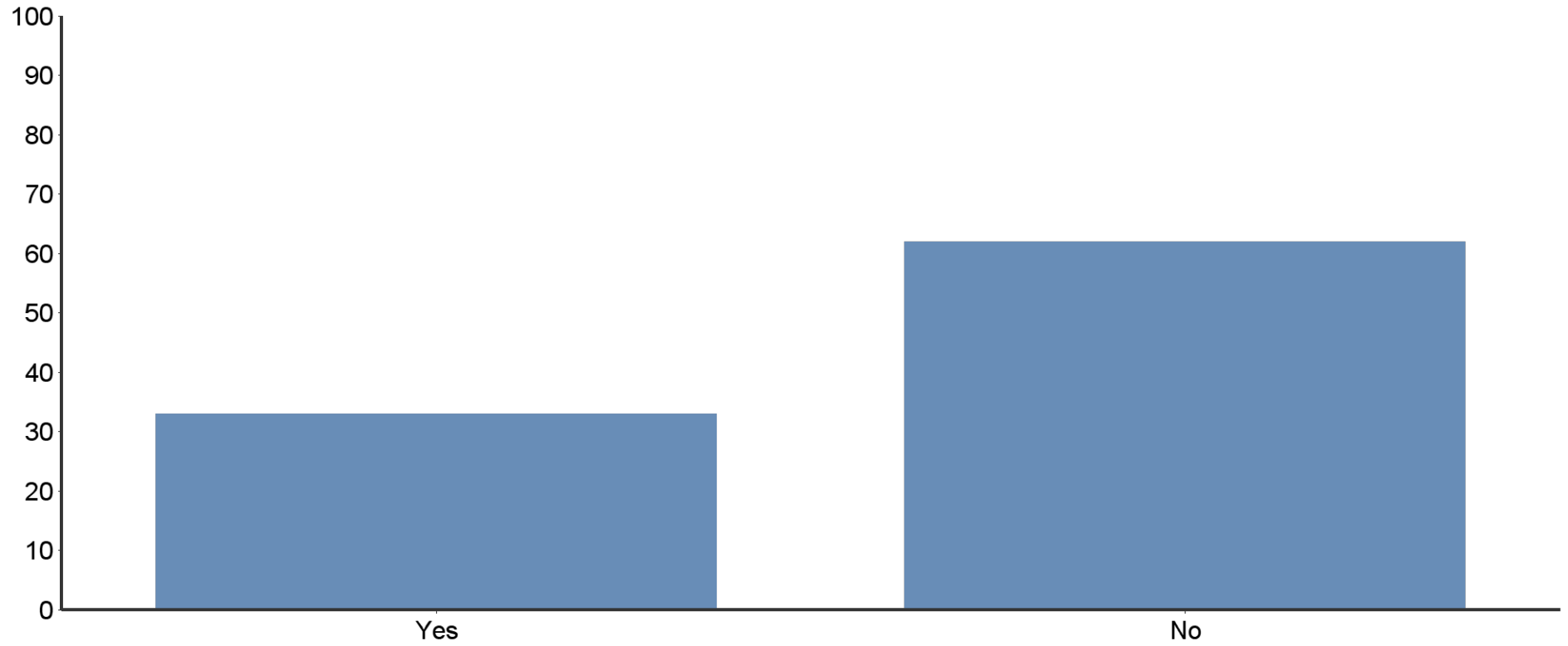
#	Answer	Bar	Response	%
1	Yes		16	41.03%
2	No		18	46.15%
4	Comments		18	46.15%
	Total		52	100.00%



11. What type of new housing would you like to see in Olmsted Falls? (check all that apply)



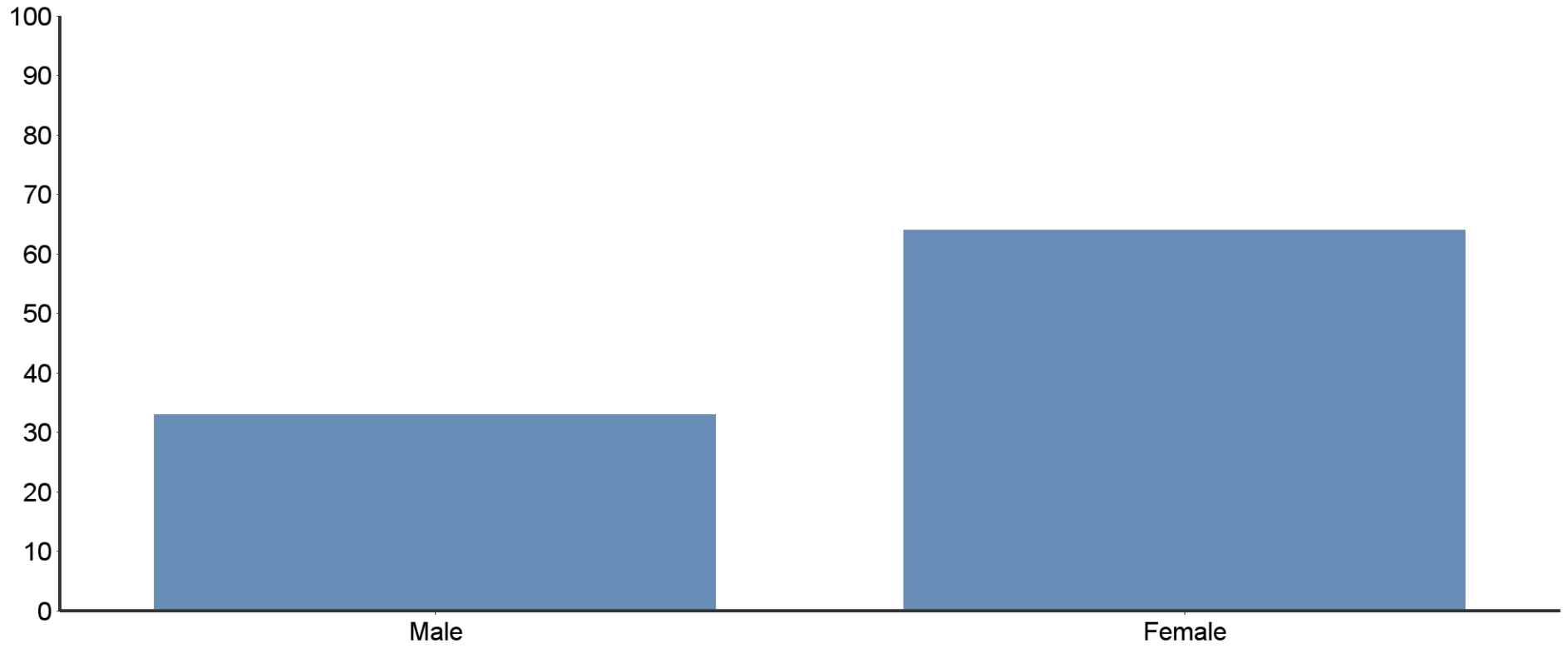
#	Answer	Bar	Response	%
1	Upgrade existing housing		19	20.00%
2	New single family homes		23	24.21%
3	New single family cluster homes		7	7.37%
4	Townhomes		10	10.53%
5	Apartments		5	5.26%
6	Condominiums		10	10.53%
7	Mature adult housing		23	24.21%
8	No additional housing		28	29.47%
9	Other		11	11.58%
	Total		136	100.00%



12. If public transportation were available for you to visit Olmsted Falls' historic downtown, would you use it?



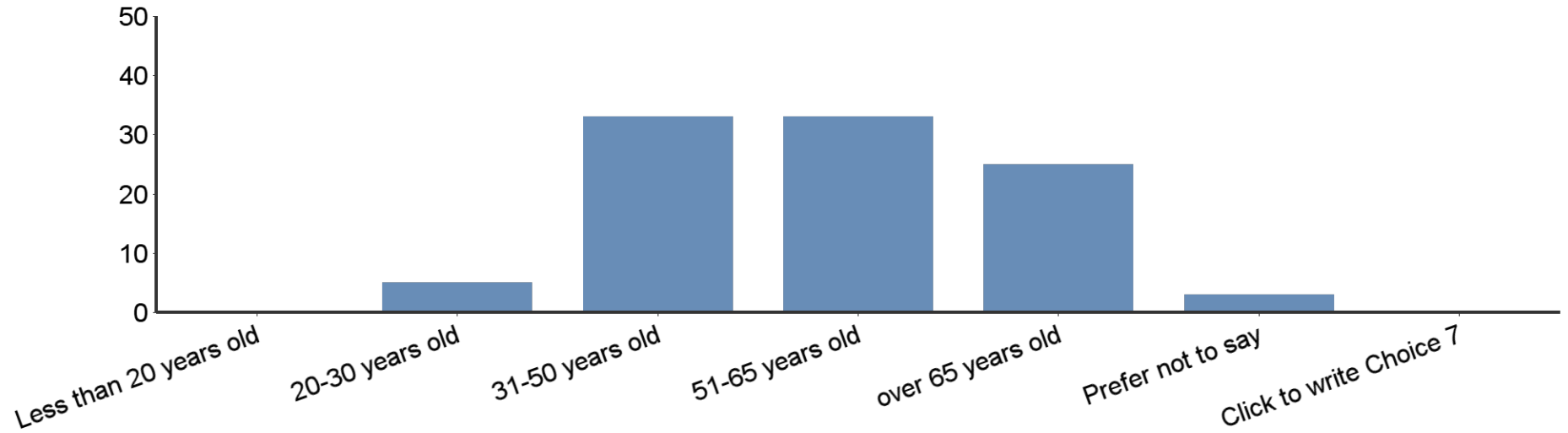
#	Answer	Bar	Response	%
1	Yes		33	34.74%
2	No		62	65.26%
	Total		95	100.00%

13. Are you:



#	Answer	Bar	Response	%
1	Male		33	34.02%
2	Female		64	65.98%
	Total		97	100.00%

14. Are you:



#	Answer	Bar	Response	%
1	Less than 20 years old		0	0.00%
2	20-30 years old	<div style="width: 5px; height: 10px; background-color: #4F81BD;"></div>	5	5.05%
3	31-50 years old	<div style="width: 33px; height: 10px; background-color: #4F81BD;"></div>	33	33.33%
4	51-65 years old	<div style="width: 33px; height: 10px; background-color: #4F81BD;"></div>	33	33.33%
5	over 65 years old	<div style="width: 25px; height: 10px; background-color: #4F81BD;"></div>	25	25.25%
6	Prefer not to say	<div style="width: 3px; height: 10px; background-color: #4F81BD;"></div>	3	3.03%
7	Click to write Choice 7		0	0.00%
	Total		99	100.00%