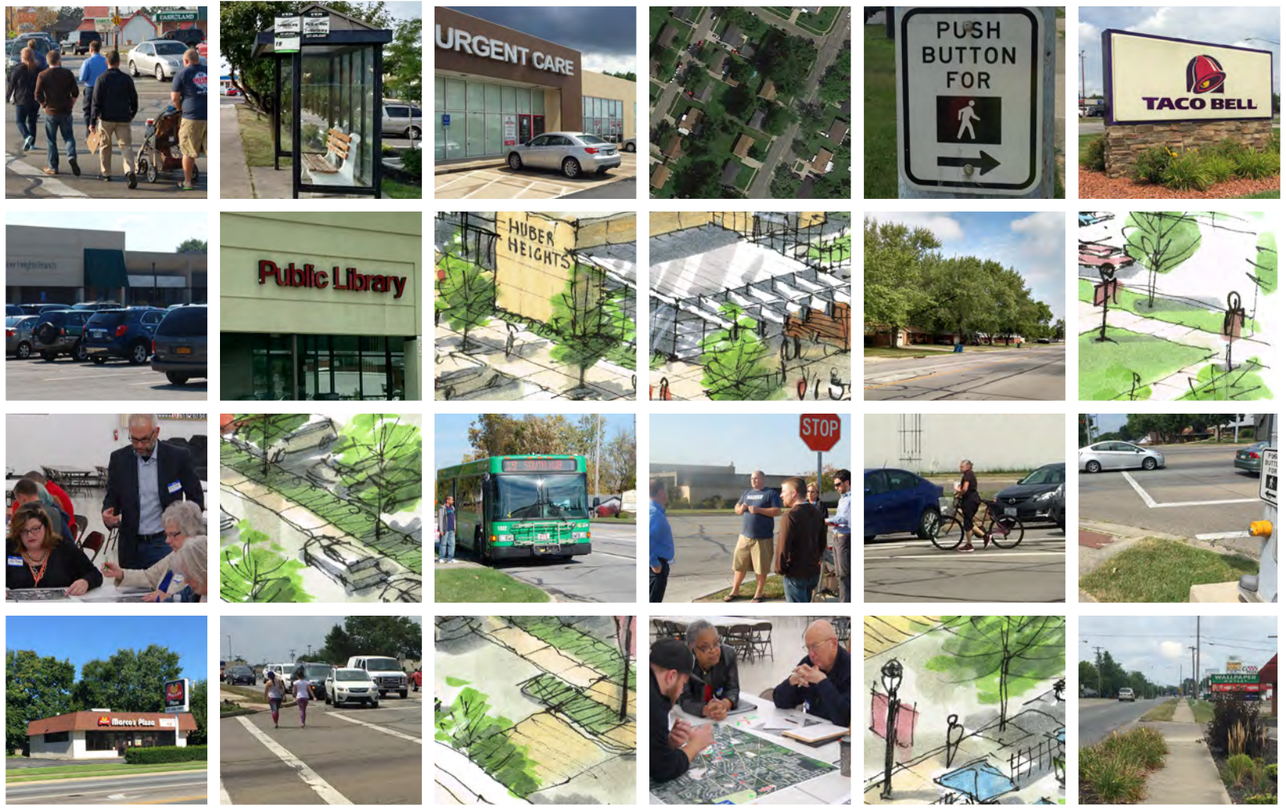

Brandt Pike Target Revitalization Plan

City of Huber Heights, Ohio | **May 2017**

Burton Planning Services

Urban Decision Group

HUBER HEIGHTS

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Conceptual rendering: new civic use building at Brandt Pike and Chambersburg Road

Conceptual rendering: revitalized Huber Center, looking southwest from Chambersburg Road and Brandt Pike

discover Brandt Pike

discover Brandt Pike

Prepared For:

HUBER HEIGHTS

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Table of Contents

PART I: Existing Conditions

Chapter 1: Introduction 1
Chapter 2: History 3
Community 3
Transportation 4
Brandt Pike Corridor 5
Chapter 3: Community Profile 7
Population 7
Employment 9
Race 10
Age 11
Income 12
Chapter 4: Natural Environment 13
Soil Drainage 14
Topography and Slope 15
Hydrology, Wetlands, and Water Courses 17
Stormwater and Impervious Surface Areas 18
Wooded Areas 20
Prime Farmland 21
Natural Environment Suitability 22
Chapter 5: Built Environment 23
Existing Land Use 23
Utilities 27
Rural to Urban Transect 27
Private and Public Realms 29
Chapter 6: Transportation Environment 31
Roadway Geometry 32
Traffic Volumes 34
Public Transportation 36
Pedestrian Environment 38
Bicycle Facilities 43
Access Management 44
Parking 47
Chapter 7: Commercial and Housing Markets 49
Commercial Market 49
Housing Market 87
Chapter 8: Existing Conditions Conclusion and SWOT Analysis 103

PART II: Recommendations

Chapter 9: Redevelopment Plan 108
Public Realm (Transportation Improvements) 109
Private Realm (Built Environment Improvements) 120
Commercial and Housing Markets 140
Chapter 10: Implementation 143
Public Realm (Transportation Improvements) Strategies 143
Private Realm (Built Environment Improvements) Strategies 145
Commercial and Housing Markets Strategies 148
Appendix I: List of Figures/Tables* 153
Appendix II: Public Involvement Process 157
Appendix III: Regulatory Assessment 161
Appendix IV: Commercial Market Supplementary Analysis 165

**All photographs were taken by Burton Planning Services or Urban Decision Group, unless otherwise specified.*

Part I: Existing Conditions

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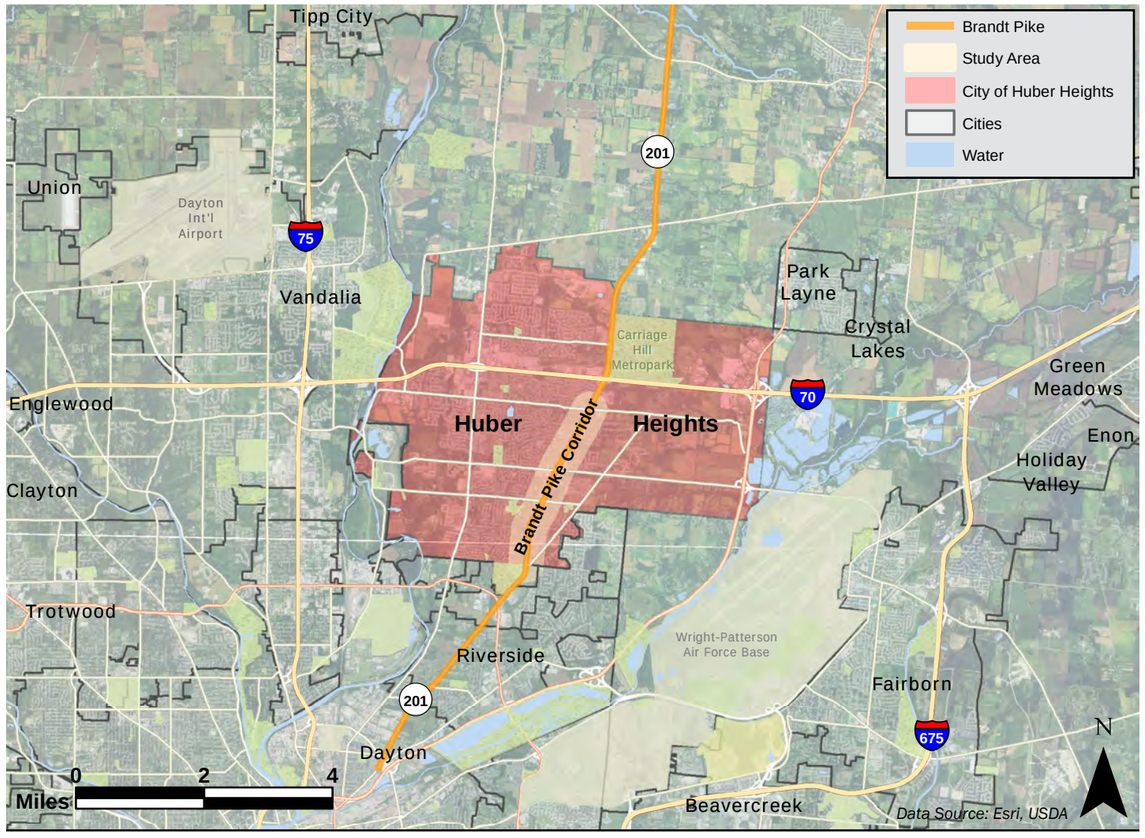
Chapter 1: Introduction

It has been over ten years since the most recent effort to revitalize a portion of the Brandt Pike Corridor (Figure 1.1). Initiated and supported by the private and public sectors, that effort included redevelopment of an area south of Huber Center. At that time, several Preliminary Conceptual Goals were developed, including:

- Improving existing and developing new housing
- Improving commercial corridors
- Improving parks
- Improving public safety strategies
- Improving active transportation for pedestrians, bicyclists, and transit users
- Landscaping and community gardens to improve the urban environment and increase green space
- Promoting art in public places throughout the city
- Conducting neighborhood clean-ups
- Promoting energy conservation and recycling
- Improving water quality in lakes and streams
- Building recreational areas, like playgrounds and trails
- Investing in programs for youth
- Building improvements for small businesses
- Programming community gatherings and events

The City, as a whole, has experienced steady growth that has recently stabilized in the last ten years. However, retail sales lost to newer commercial sites surrounding the community continue to impact the corridor. Auto-oriented businesses have thrived along the corridor, taking advantage of the Pike's heavy traffic volumes. Other businesses have closed, leaving vacant retail space within several strip shopping centers. Despite these changes, the public has demonstrated their support for the area with the creation of a well-attended farmers market and the frequently visited branch of the Dayton Metro Library.

Figure 1.1: Brandt Pike Corridor, regional context



The Brandt Pike Target Revitalization Plan, led by the City and with heavy community involvement, is an effort to initiate revitalization along the corridor. The Plan creates short-, mid-, and long-term strategies, and identifies opportunities to make lasting improvements to the corridor. These improvements will not only enhance the local economy, but provide needed housing, improve active transportation facilities, and create the much-needed central gathering place that Huber Heights currently lacks.

This report is divided into two parts. Part I, Chapters 1-8, examines the existing conditions in Huber Heights and on the Brandt Pike corridor. Part II, Chapters 9 and 10, presents the Redevelopment Plan. Several miscellaneous topics, such as public involvement efforts and a regulatory assessment, are included as appendices.

Chapter 2 provides a brief history of Huber Heights, including historical development and land use patterns, and trends in transportation that led to current conditions on the Pike.

Chapter 3 describes community demographics, including population changes, employment, age, race, and income.

Chapter 4 studies the natural elements along Brandt Pike and what role those features play in development and land use. Maps and descriptions of soil drainage, topography, water features, land cover, and agriculture are presented in this chapter.

Chapter 5 examines the built environment, describing the built form and size of various land uses on the Pike, such as commercial, residential, and civic. This chapter also compares development on Brandt Pike to other areas near Huber Heights, categorizing different development patterns into zones along the urban-to-rural transect, and what role the public and private realms play in each zone.

Chapter 6 provides a more detailed analysis of the public realm on Brandt Pike, documenting different elements of the roadway. These elements include roadway geometry, traffic volumes, public transportation, the pedestrian environment, bicycle facilities, access management, and parking.

Chapter 7 shifts to the private realm, focusing on the housing and retail markets in the area and how the markets are effected by demographic changes, building stock, the economy, and the city's history.

Chapter 8 summarizes all of the existing conditions using a Strengths, Weaknesses, Opportunities, and Threats analysis.

Chapter 9 presents detailed recommendations for revitalization along the Brandt Pike corridor, divided into three categories: Public Realm (Transportation Improvements), Private Realm (Built Environment Improvements), and Commercial and Housing Markets.

Chapter 10 elaborates on the proposed recommendations, listing strategies, action items, and timelines/phasing for each category.

Figure 1.2: Dayton Metro Library Huber Heights Branch

Figure 1.3: Discover Brandt Pike information on electronic billboard

Chapter 2: History

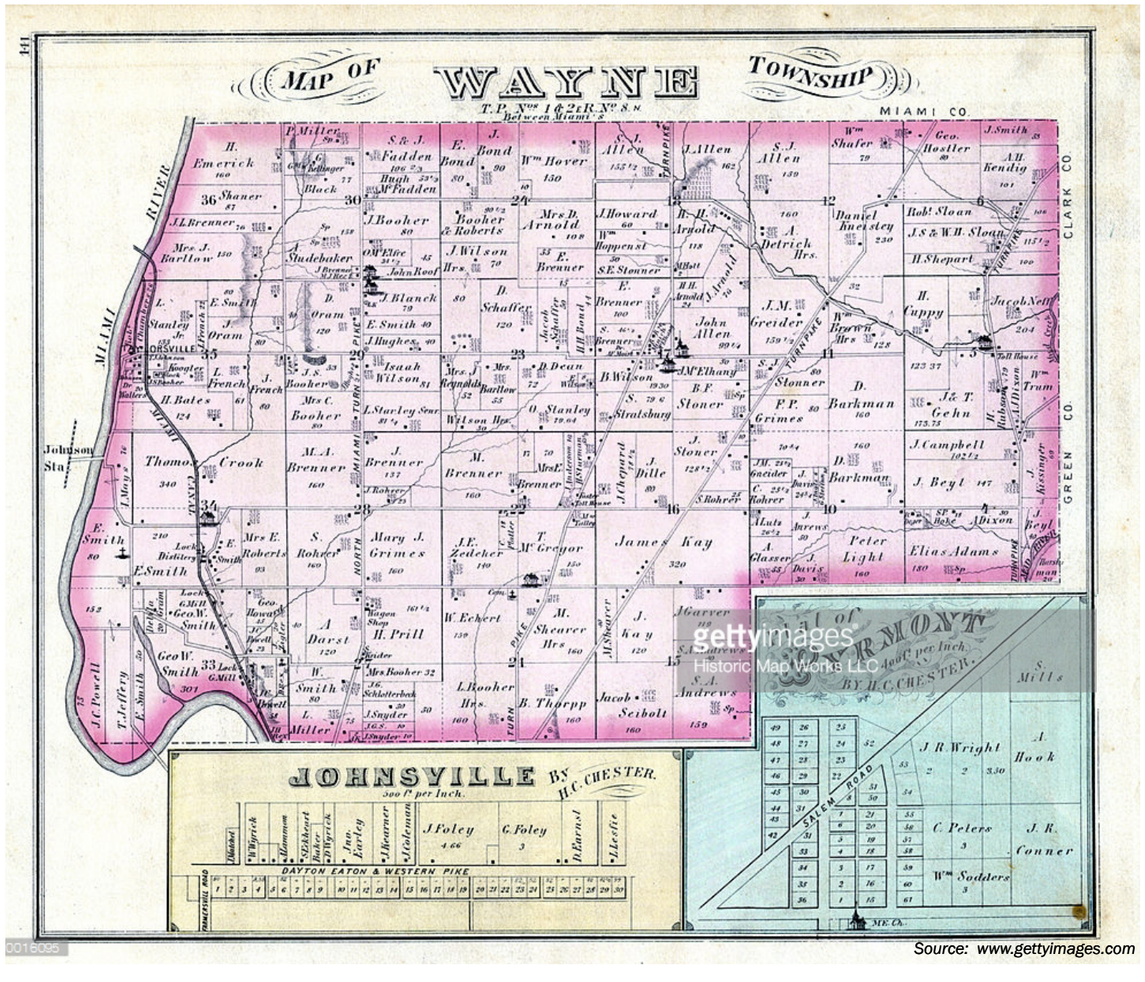
Community

Although the City of Huber Heights was not incorporated until 1981, recorded history of the area dates back to the early 1800's. Wayne Township was formed in the northeastern corner of Montgomery County on January 1, 1810. The township was named in honor of Major General Anthony Wayne, who commanded the United States Army under President George Washington during the closing years of the Northwest Indian War (also known as the Ohio Indian War, from 1785-1795). Wayne led an assault against American Indian armies at the Battle of Fallen Timbers, near present-day Toledo, which proved to be a decisive victory, winning the war for the United States and leading to the eventual statehood of Ohio in 1803. There are many townships, cities, and other jurisdictions named after Wayne across the east coast and Midwest.

The land that used to be Wayne Township is better known for another man who put his stamp on the area, singlehandedly shaping its built environment for generations. From 1956-1992, Charles Huber built more than 10,700 single-family homes and 2,550 multi-family homes[1] in what is now the City of Huber Heights. The area was incorporated in 1981. Hailing from a family of developers, Huber built 27,00[2] houses and apartments in Columbus, Cincinnati, Indianapolis, and several other cities throughout the country.

1. *Huber Heights Chamber of Commerce*
2. *Cincinnati.com*

Figure 2.1: Historic map of Wayne Township.



Source: www.gettyimages.com

During the development of his namesake city, Charles Huber donated millions of dollars worth of land for the construction of schools, parks, and other civic uses.

During the development of his namesake city, Charles Huber donated millions of dollars worth of land for the construction of schools, parks, and other civic uses[3]. While Huber oversaw the growth of the largest development of brick homes in the country, other changes in the area were shaping the built environment as well. Suburban areas around Dayton expanded rapidly, as the City's booming industrial and manufacturing sectors attracted working class families. In the late 1950's, Interstate 70 (I-70) was extended through the northern part of Wayne Township. While the Interstate System dramatically reshaped the region's roadway network, a long evolution of travel modes preceded its arrival.

3. *Ibid*

Figures 2.2 & 2.3: Typical brick homes in Huber Heights.

Source: www.zillow.com

Source: www.zillow.com

Transportation

In the 19th Century, prior to the advent of the National Highway System, residents of Dayton and the surrounding area relied on a network of turnpikes that connected towns and cities throughout the region. Although many of these primitive roads were eventually supplanted by railroads as the preferred form of long-distance travel, they saw a resurgence in popularity with the coming of the automobile.

Many historic turnpikes, including Brandt Pike, were incorporated into the state highway system in 1927.

Many historic turnpikes, including Brandt Pike, were incorporated into the state highway system in 1927, when the Ohio Department of Highways renumbered its routes to correspond with the United States Numbered Highway System[4]. Included in the renumbering program were Brandt Pike, which became State Route 201, the Dayton-Montgomery Pike (State Route 202), and the Dayton-Lebanon Pike (State Route 48).

4. *Lima News*

Figures 2.4 & 2.5: Typical road conditions in the Dayton area, late 1800's.

Source: Dayton Metropolitan Library

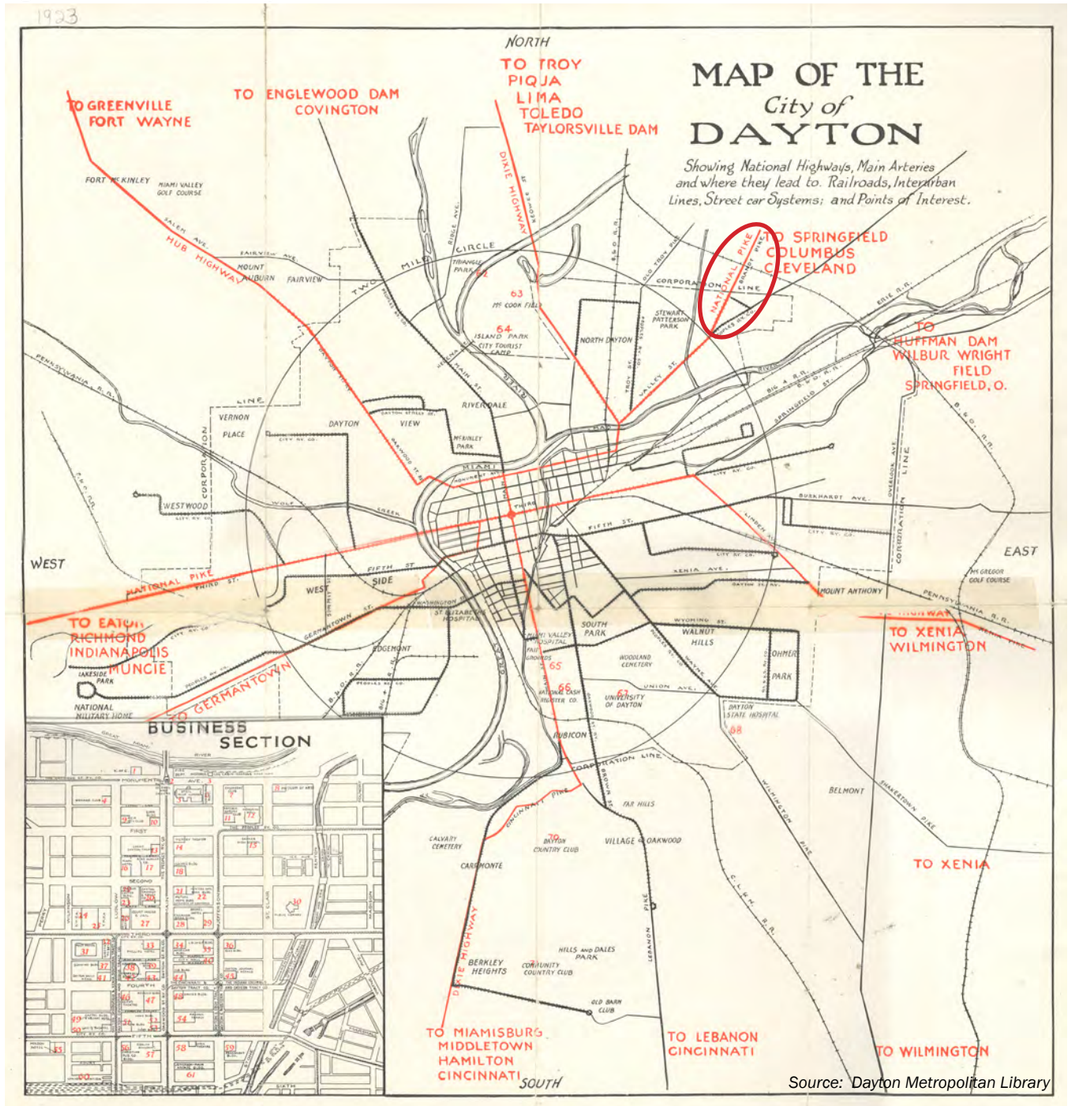
Source: Dayton Metropolitan Library

The automobile's popularity spurred demand for better roads. As paved roads expanded across the region, residents of Dayton moved away from the city to more rural areas. In 1940, 71 percent of Montgomery County's population lived in Dayton; by 1970, that number dropped to 40 percent, and the number of registered vehicles in the county had more than trebled[5]. A dispersed population led to more and longer vehicle trips. Bedroom communities such as Huber Heights generated commuter traffic to and from Downtown Dayton.

New highways also brought the advent of the suburban shopping center, and auto-oriented, strip development sprouted up across the region. The 1964 completion of I-70 north of Dayton to the Indiana line only exacerbated this trend.

5. *Ohio Historic Preservation Office*

Figure 2.6: A 1923 map of Dayton's main roads. Brandt Pike is circled in red.



Source: Dayton Metropolitan Library

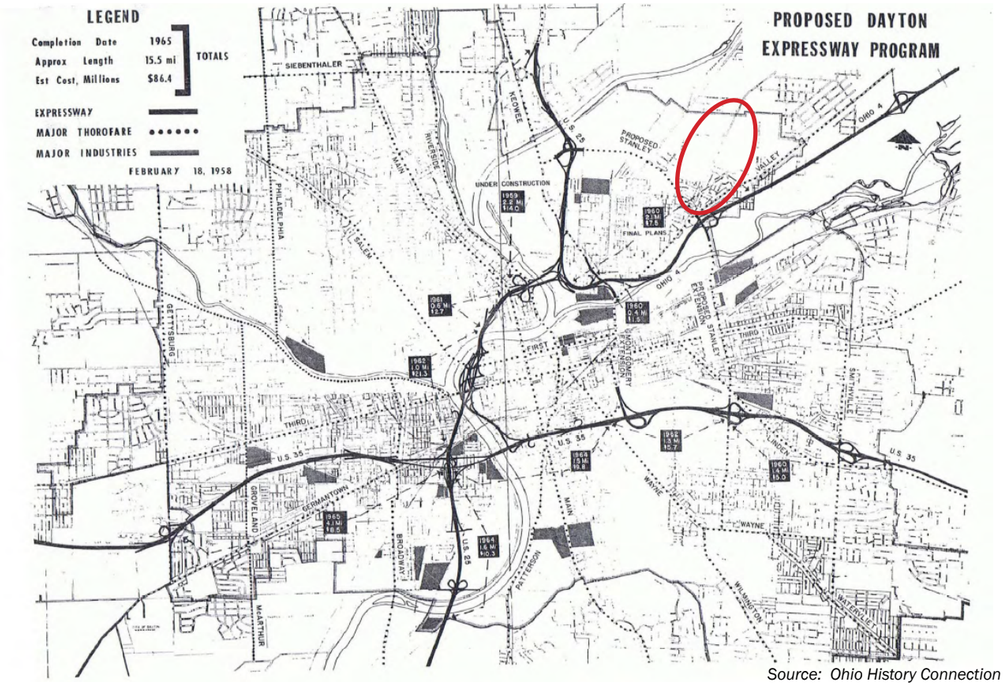
Brandt Pike Corridor

Brandt Pike is part of State Route 201 (SR-201), a 22 mile highway that extends north from Dayton and travels through Montgomery and Miami Counties before terminating at State Route 55, between Casstown and Christiansburg. The section between its southern terminus and US Route 40 (US-40) was designated a state route in 1923, and extended north in 1927. Major intersections include I-70 in Huber Heights and US-40 in Bethel Township. A five mile segment of SR-201 traverses Huber Heights, where it is called Brandt Pike. This plan focuses on the 2.7 mile section of Brandt Pike from Kitridge Road north to Taylorsville Road.

As a state highway, maintenance of State Route 201 falls primarily to the Ohio Department of Transportation (ODOT). In incorporated areas, such as Huber Heights, local governments are responsible for maintenance and upkeep.

The area once known as Wayne Township has seen many transformations since its founding, including population changes and other demographic trends. These topics are discussed in the following chapter.

Figure 2.7: A historic map of Dayton's proposed expressway program. Brandt Pike is circled in red.



Source: Ohio History Connection

Chapter 3: Community Profile

This chapter provides an overview of demographic trends in Huber Heights, including the following categories:

- Population
- Employment
- Race
- Age
- Income

Population, age, and income data are described in more detail in Chapter 7: Commercial and Housing Markets.

Population

Huber Heights' population has seen moderate changes over the past 25 years (Figure 3.1). In 1999, the population peaked, at 42,607, a ten percent increase from it's 1990 population. Subsequently, the new millennium brought a steady downward trend in population over the next decade, which shrank to 36,953 in 2009, a 13 percent decrease from its peak. The City regained some population in 2010, at 38,162. Since then, numbers have remained stable, fluctuating slightly from year to year. By 2010 Census numbers, Huber Heights is the third largest suburb of Dayton, after Kettering (56,240) and Beavercreek (45,226)[1]. Figure 3.2 shows population data by Traffic Analysis Zone (TAZ). Traffic Analysis Zones are established by the Ohio Department of Transportation for the purposes of organizing data for transportation studies.

Figure 3.1: Huber Heights historic population (1990-2015).

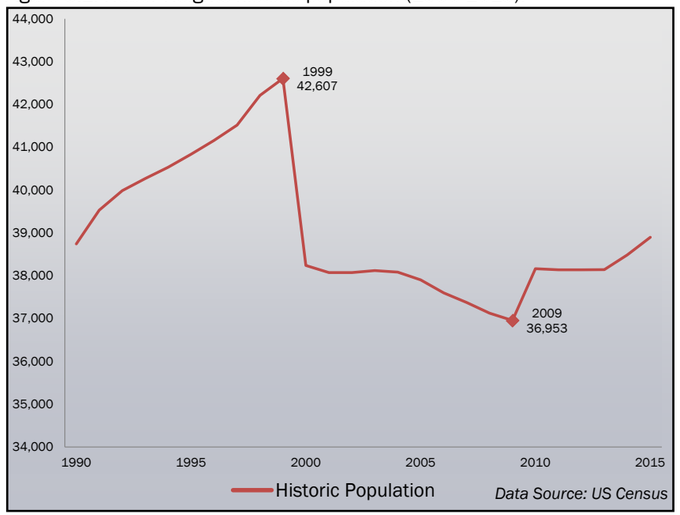
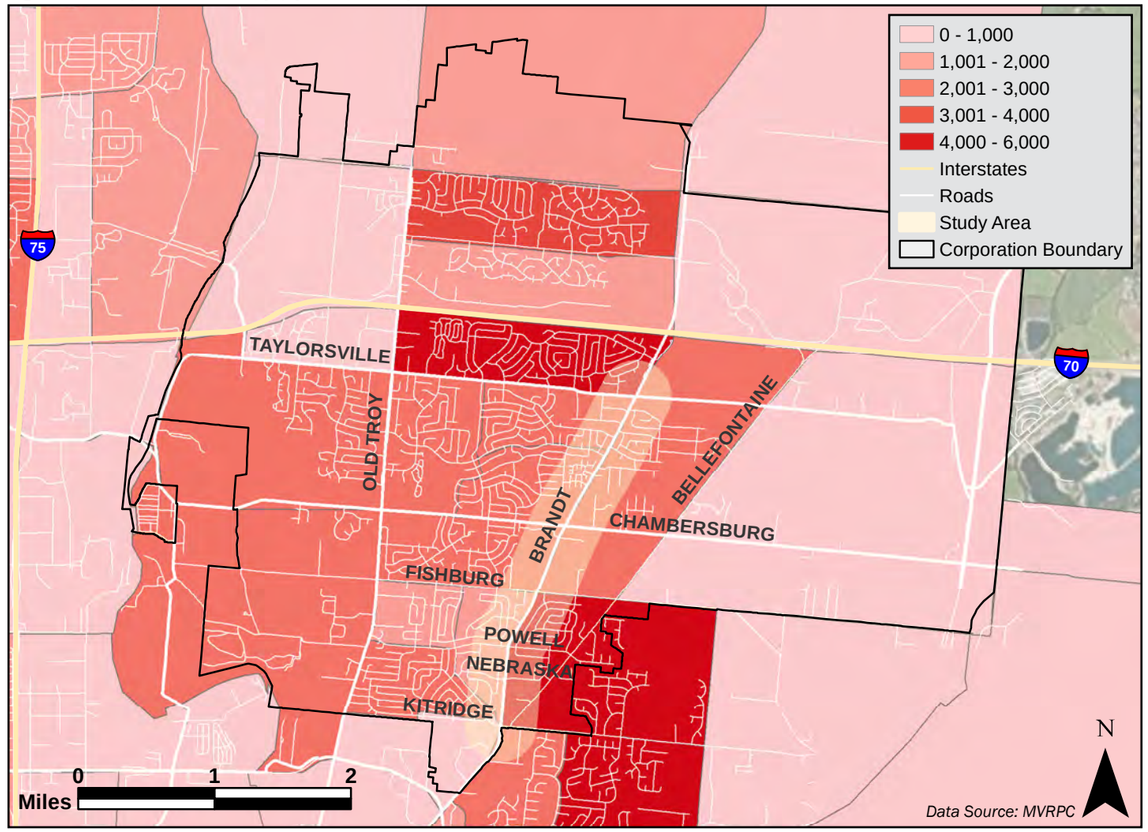


Figure 3.2: Population Density (by Traffic Analysis Zone)



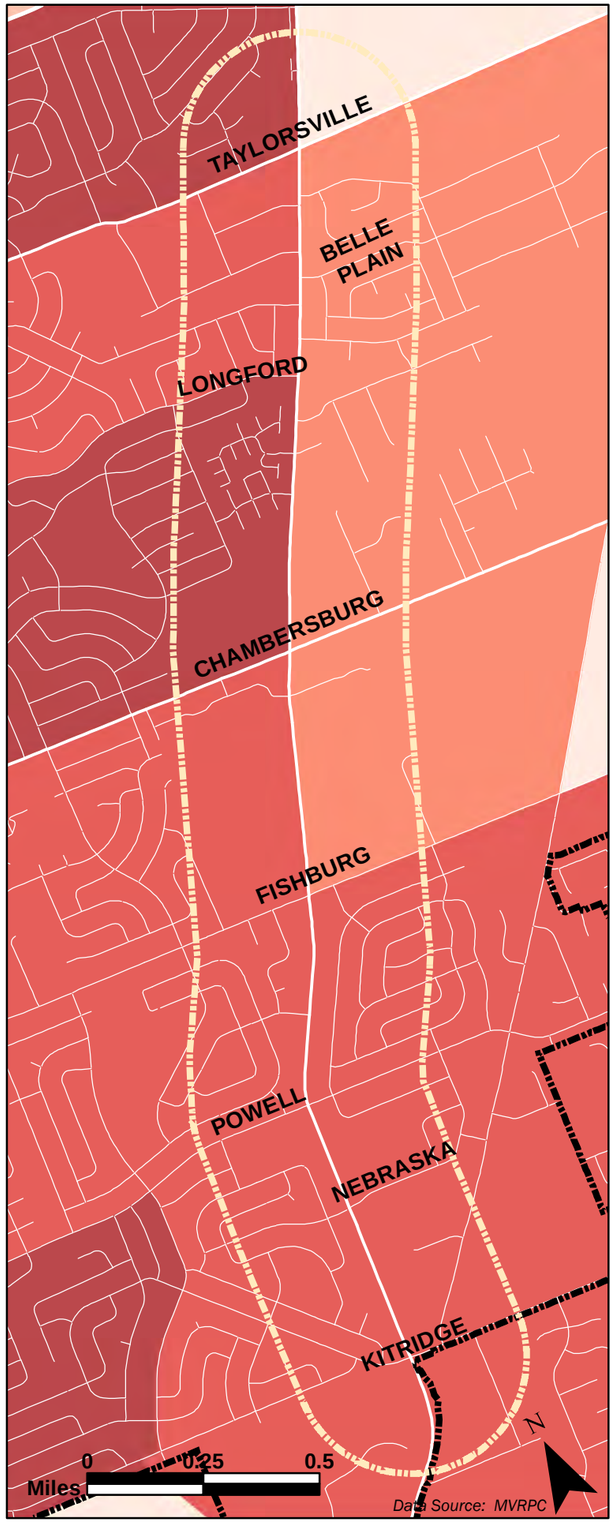
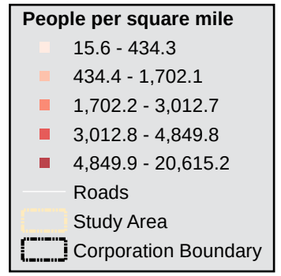


Figure 3.3: Population Density: Study Area



The densest areas in Huber Heights (Figure 3.2) include the southeast corner of the city, along Bellefontaine Road and south of Fishburg Road, which counted 5,147 residents in 2010. The neighborhood served by Stonehurst Drive, between I-70 and Taylorsville Road on the north and south, and Old Troy Pike and Brandt Pike on the west and east, is also heavily populated, with 4,593 residents in 2010.

The densest portion of the study area (Figure 3.3) is on the west side of the Pike between Chambersburg and Longford Roads, where there are a number of multifamily apartment complexes. Population density decreases on the east side, between FIshburg and Taylorsville Roads.

1. US Census

Employment

In 2015, an estimated 64 percent of the City's population 16 years and over participated in the labor force (19,211 workers)[2]. The City had an unemployment rate of 8.3 percent, compared to 5.2 percent for the State of Ohio.

The densest employment center in the City (Figure 3.4) is located north of I-70, between Old Troy and Brandt Pikes, where 3,365 people were employed in 2010, up from 2,804 in 2000. Several employers account for these high job numbers, including the Meijer grocery store, the Rose Music Center, Target, FedEx, Dayton Freight, and other retail and logistics employers in the area.

The biggest employer in the region, Wright-Patterson Air Force Base, sits just outside city limits, southeast of Huber Heights. It employs over 27,500 civilian and military personnel and creates an estimated 34,560 indirect jobs in the local economy[3].

2. *US Census*
3. *Dayton Daily News*

Like most auto-centric suburban communities, the majority of workers in Huber Heights (85 percent) drive to work alone in private vehicles. An additional eight percent carpool to work, and the remaining seven percent use public transit, walk, or other means, or work at home (Figure 3.5).

Figure 3.5: Huber Heights commute characteristics.

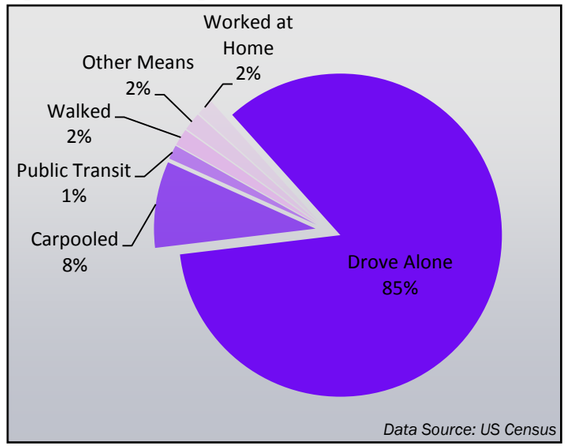
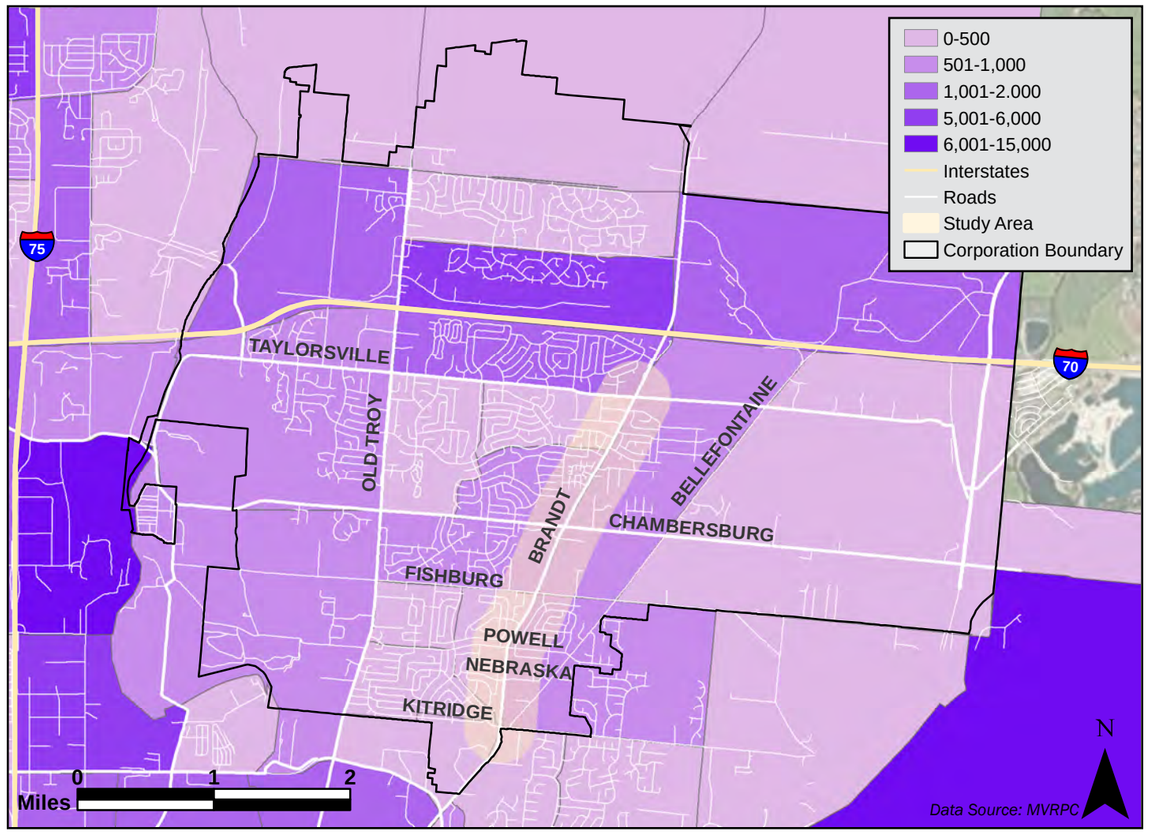


Figure 3.4: Job Density (by Traffic Analysis Zone)



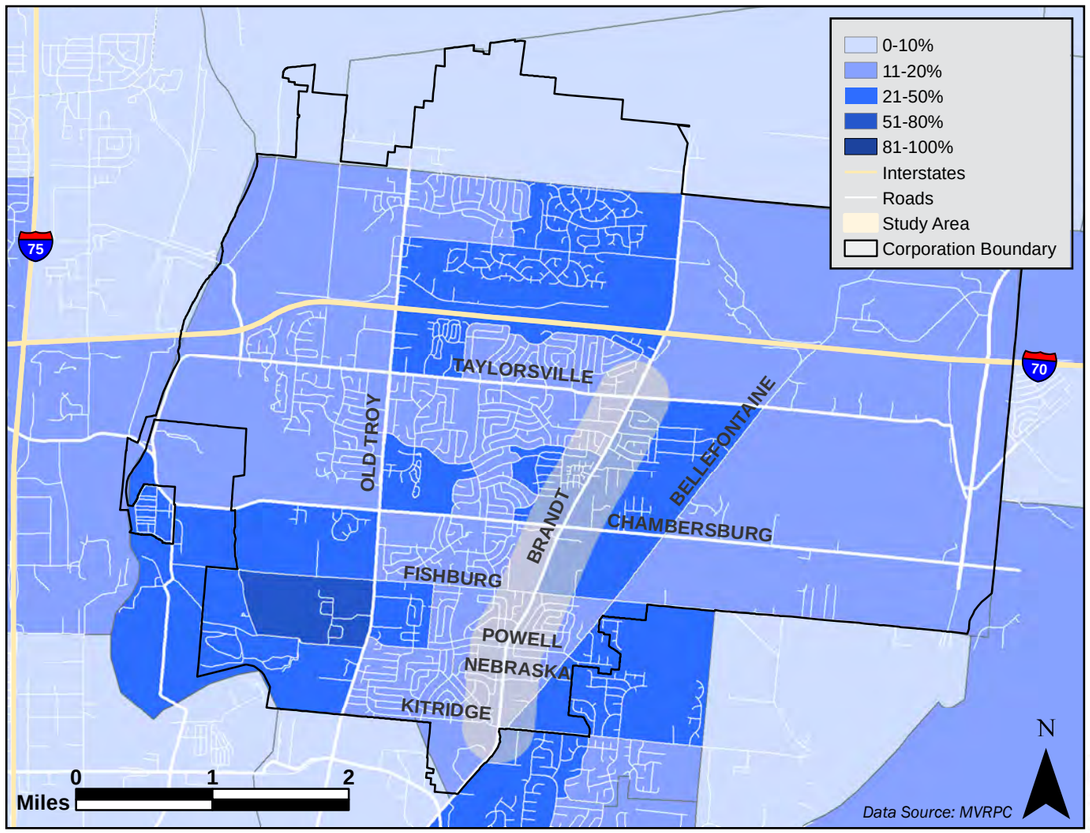
Race

In 2015, 78 percent of Huber Heights' population was White. 13.6 percent of the population was Black, 3.4 percent was Latino or Hispanic, 1.7 percent was Asian, and five percent identified as multi-racial[4].

The minority population is concentrated in several areas of the City: in the southwest corner, south of Chambersburg Road and west of Old Troy Pike, minorities account for more than half of the population in one census block, and one fourth of the population in surrounding areas; along the I-70 corridor, between Old Troy Pike and Brandt Pike, minorities make up roughly one fourth of the population north of the highway, and 30 percent of the population south of the highway; and the census block at the northeast corner of Chambersburg Road and Old Troy Pike, where minorities account for 33 percent of the population. In most other parts of the City, minorities make up less than 20 percent of the population. Along Brandt Pike, most census blocks have minority populations at or below 20 percent (Figure 3.6).

4. *US Census*

Figure 3.6: Minority Population — Percent (by 2010 Census Block)



Age

The City's median age in 2010 was 37 years. The City's younger population is clustered along the I-70 corridor between State Routes 201 and 202, and in the area south of Fishburg Road and west of Old Troy Pike (Figure 3.8). In 2012, the City's population under 18 years of age was 9,763, and Huber Heights City School District reported 6,331 students enrolled[5]. In 2010, the 65 years and over population of Huber Heights was 4,900, or 13 percent of the total population[6] (Figure 3.7). By 2015, this number grew to 6,109, or 15.8 percent (Figure 3.8). Within the project study area, between 12 and 15 percent of the population is 65 years and over.

Huber Heights, like many first-tier suburbs around Ohio, is aging rapidly. In the year 2000, the population age 55 and over accounted for 18.6 percent of the population. By 2021 the population age 55 and over — the Baby Boomer generation — is projected to account for 30 percent of the total population. During the same time period, the age cohort of 45 to 54-year olds — typically the highest income earners — is projected to drop from 14.3 percent in 2000 to 12.3 percent by 2021.

5. *New American Foundation*
6. *US Census*

Figure 3.8: Huber Heights Population by Age (2015) — Percent

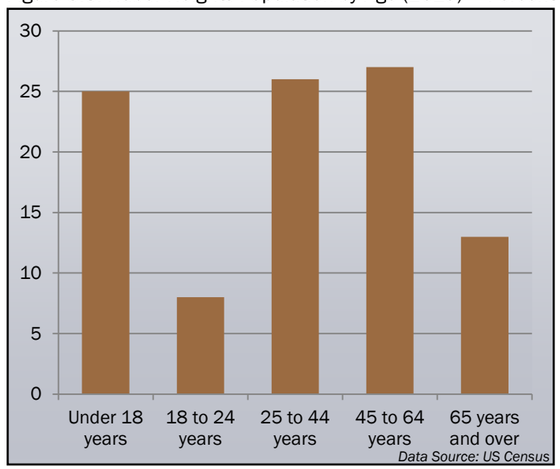
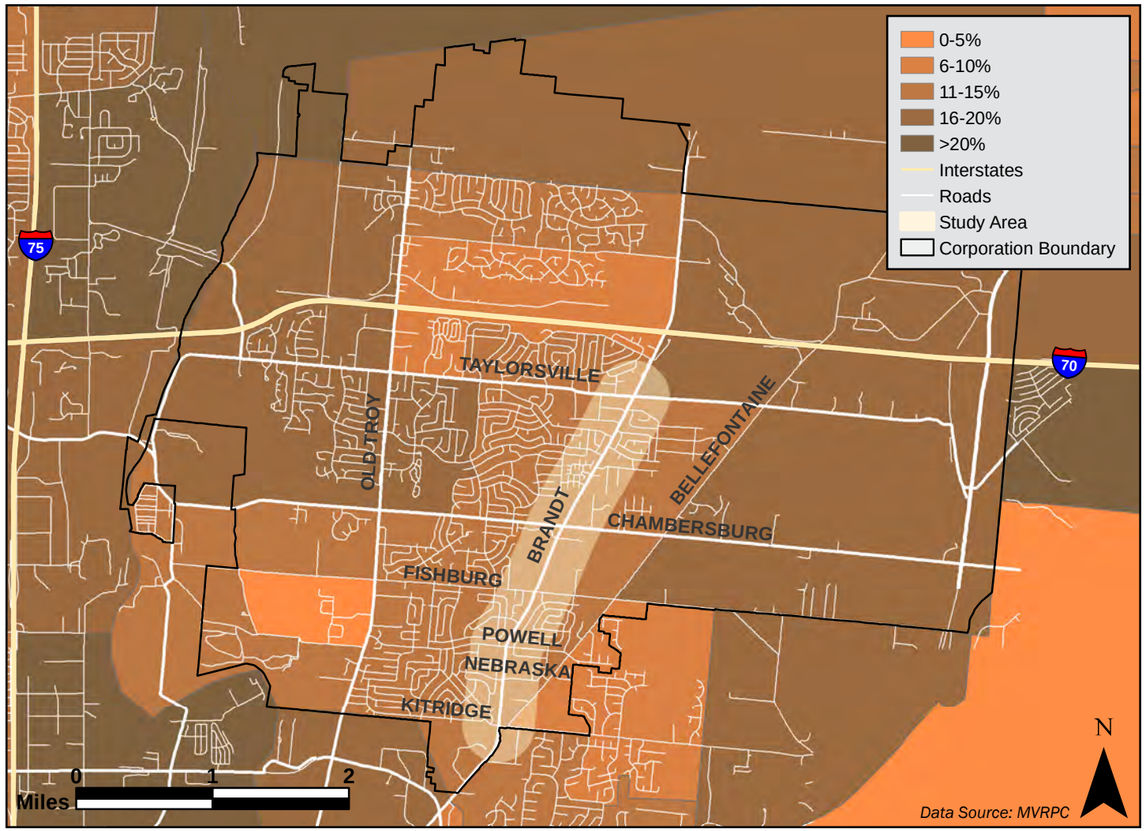


Figure 3.7: Population 65 Years and Over — Percent (by 2010 Census Block)



Income

In 2015, almost half of the households in Huber Heights had an annual income under $50,000 (see Figure 3.9). The highest-earning households in the city are located in the Carriage Trails development north of I-70, the area southwest of the Chambersburg Road and Old Troy Pike intersection, and the southeast corner of the city. Households in these areas earn between $75,000 and $100,000 per year. Low-income households (less than $25,000) are concentrated in the area southwest of the Fishburg Road and Old Troy Pike intersection (Figure 3.10).

Figure 3.9: Huber Heights Income by Household (2015) — Percent

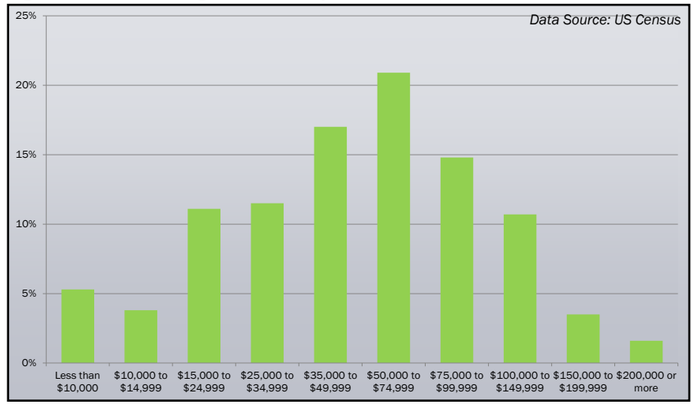
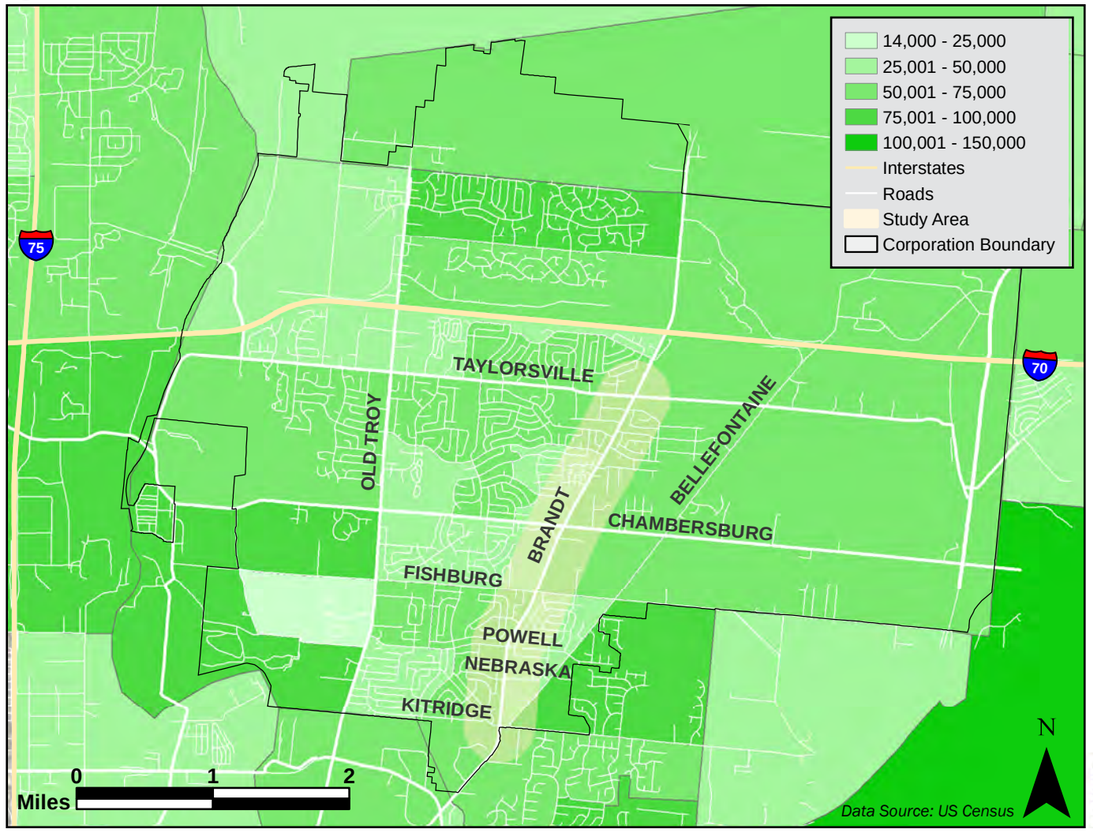


Figure 3.10: Median Household Income (by 2011 Census Block)



Chapter 4: Natural Environment

The natural environment has historically placed very few limitations on development along the Pike, allowing it to occur almost everywhere and at a very low density. The lack of significant natural features has not only made development easier, it has also resulted in a dearth of a natural presence along the corridor.

Although there are many factors that make up what is considered the natural environment, the Miami Valley Regional Planning Commission (MVRPC) has identified several key components that could constrain future infill and redevelopment along the Brandt Pike corridor.

The MVRPC's report, titled the Miami Valley Land Suitability Assessment — Natural Environment Factors study, explains that "the natural environment factors analyzed in this assessment, such as soil, topography/ slope, wooded areas, water courses, and prime farmland, were included because of their significance in the context of land use planning".[1] This chapter looks at each of these factors in more detail as they relate to the corridor.

1. *Miami Valley Regional Planning Commission*

Figures 4.1: Deciduous forest near the southern end of the study area.

Figures 4.3: Some undeveloped land in the study area (in green) is suitable for agricultural use.

Figures 4.3: Residential parts of Brandt Pike have a robust tree canopy.

Figures 4.4: A community garden takes advantage of undeveloped land behind Huber Center.

Figure 4.5: Soil Drainage

Soil Drainage

Different types of soil have varying effects on drainage. In the Miami Valley region, flat areas with mostly clay soils and poor drainage limit development because they may cause high water tables that could become hazardous and damage structures. Areas with poor drainage may make basements wet, increase ponding, and restrict root growth including the growth of plants and trees around homes.

The U.S. Department of Agriculture (USDA) defines soil drainage as the removal of excess water from the soil. The MVRPC study classified soil drainage into four categories: Well Drained; Somewhat Poorly Drained; Poorly/Very Poorly Drained; and Not Rated.

Most of the soils along the Pike, including land already developed, are well drained.

58.2 percent of the land in the region is composed of soil types that allow good drainage. Approximately 18.8 percent of the region's soils, however, have poor or very poor drainage. Most of the soils along the Pike, including land already developed, are well drained (Figure 4.5). The three exceptions include the area directly south of Taylorsville Road (Poorly/Very Poorly Drained), the wooded parcel between Fishburg Road and the Poelking Bowling Center (Somewhat Poorly Drained), and a portion of the wooded parcel east of the PNC Bank property, north of Kitridge Road (Poorly/Very Poorly Drained).

Figure 4.6: Topography

Elevation (ft)
- 680 - 800
- 801 - 820
- 821 - 840
- 841 - 860
- 861 - 880
- 881 - 900
- 901 - 920
- 921 - 940
- 941 - 960
- 961 - 980
- 981 - 1000
- 1001 - 1020
- 1021 - 1040
- 1041 - 1060
- Roads
- Study Area
- Corporation Boundary

Topography and Slope

With respect to topography, Huber Heights — including the northern end of the study area — represents one of the highest elevations in the region. As Figures 4.6 and 4.7 show, the lowest elevation of 915 feet above sea level within the study area is toward the Kitridge Road intersection. From its starting point north of Downtown Dayton, Brandt Pike rises 240 feet, from 760 feet at the intersection with Valley Street, to almost 1,000 feet south of Longford Road, its highest point in Huber Heights.

Huber Heights — including the northern end of the study area — represents one of the highest elevations in the region.

Slope is defined as the vertical change in elevation over a given horizontal distance and can be measured as a percentage, a ratio, or an angle. The MVRPC study categorizes the Miami Valley region's land into three different slope types: Flat (Slope

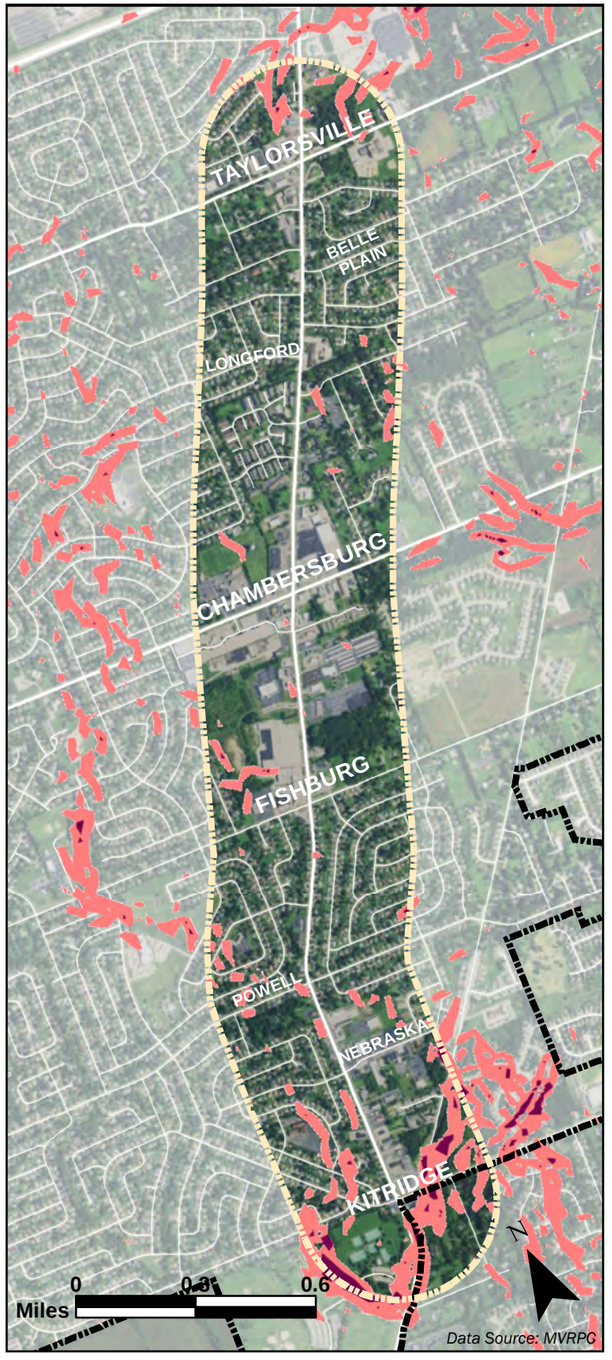


Figure 4.8: Slope

- Rolling
- Steep
- Roads
- Study Area
- Corporation Boundary

less than 6 percent), Rolling (6 percent to 12 percent), and Steep (Slope greater than 12 percent).

The region, in general, is made up of flat land with less than a 6 percent slope. Only 15.6 percent of the region's land has rolling or steep slopes. Most of the land within Huber Heights and along Brandt Pike is flat, with only a small percentage classified as rolling. For instance, a 180 foot difference between the north and south ends of the study area creates a very gradual slope that is barely perceptible.

The topography within the study area is gently rolling with only a few areas along the corridor having slopes over 6 percent.

Steep slopes, or slopes greater than 12 percent, make site development more complicated by requiring extensive site cutting and filling or use of post and beam construction. As Figure 4.8 shows, the topography within the study area is gently rolling with only a few areas along the corridor having slopes over 6 percent (including the vacant site directly south of the Huber Center property, and the area northeast of the Bellefontaine Road and Kitridge intersection).

Figure 4.7, continued: Brandt Pike Elevation Gain

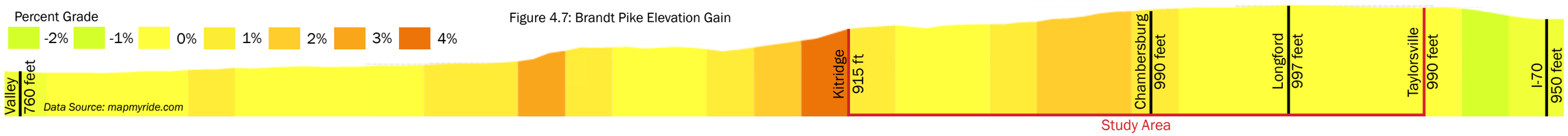


Figure 4.7: Brandt Pike Elevation Gain

Figure 4.9: Water Features

- Freshwater Emergent Wetland
- Freshwater Forested/Shrub Wetland
- Freshwater Pond
- Stream, Culvert, or Drainage
- Roads
- Study Area
- Corporation Boundary

Hydrology, Wetlands, and Water Courses

Huber Heights and the Brandt Pike corridor are part of the Great Miami Watershed, which includes the Great Miami, Stillwater, and Mad Rivers and Twin, Wolf and Seven Mile creeks. The watershed drains all or parts of 15 counties. Originating upstream from Indian Lake, near Bellefontaine, the Great Miami River flows 170 miles southwest to its confluence with the Ohio River west of Cincinnati. The total drainage area of the watershed in Ohio is 3,946 square miles. The entire watershed, including the Whitewater River in Indiana, drains 5,702 square miles. Because the corridor runs along a ridge that lies in-between the Great Miami and Mad Rivers, there are no major river or stream channels within the study area and no floodway or floodplains.

The U.S. Environmental Protection Agency (USEPA), defines wetlands as "areas that are inundated or saturated by surface or groundwater at a frequency and duration sufficient to support, and that under normal circumstances do support, a prevalence of vegetation typically adapted for life in saturated soil conditions." Wetlands, according to the MVRPC study, protect and improve water quality, recharge water supplies, reduce flood risks, and provide a habitat for wildlife. Wetlands are also sensitive to land development, requiring special attention before considering development.

A very small portion (1.4 percent) of the region is classified as wetlands. Along Brandt Pike, part of the wooded area northeast of the Taylorsville Road intersection, and several small pieces of land east of the study area support wetlands. Figure 4.9 also shows watercourses — streams, culverts, or drainage swales — within the study area. A storm water retention pond is located north of the Leyden Lane and Brandt Pike intersection as well as a drainage swale behind Reilly Auto Parts. Another drainage swale is found north and south of the Marian Shopping Center. A fresh water pond is located within a wooded area south of the Shopping Center.

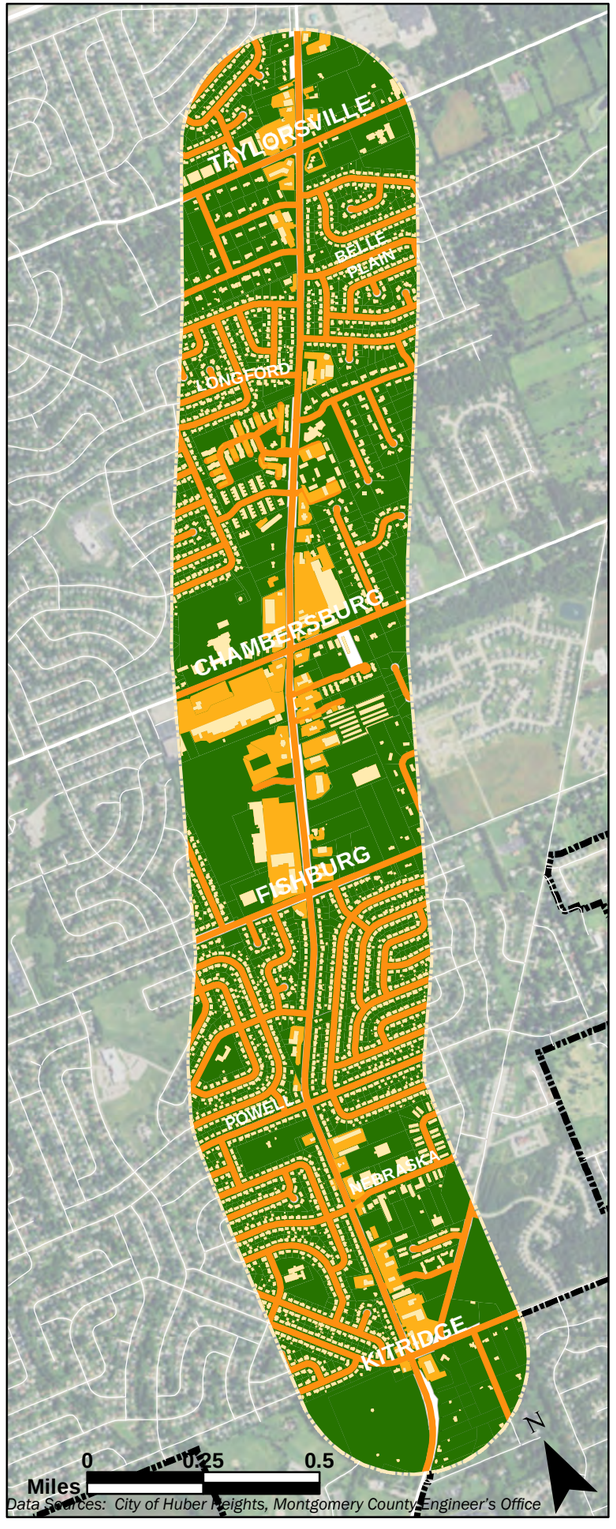
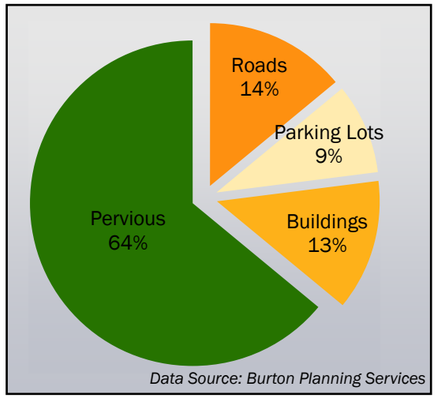


Figure 4.10: Impervious Surface Area

- Buildings
- Parking
- Roads
- Pervious Surface Area
- Study Area
- Corporation Boundary

Figure 4.11: Impervious Surface Area — Percent



Stormwater and Impervious Surface Areas

Impervious surfaces, such as buildings, roads, parking lots, and sidewalks made of conventional concrete or asphalt, interrupt the water cycle's natural flow, blocking rainwater from infiltrating the soil. Instead, large volumes of polluted stormwater empty into the sewer system and eventually into the region's lakes, rivers, and natural water features. This process can harm plant and wildlife and pollute drinking water. Stormwater runoff from roads and parking lots is particularly caustic, as it contains heavy metals and oil from vehicles.

Figures 4.10 and 4.11 show impervious surface areas in the study area. Thirty-six percent of the study area is covered by impervious surfaces, of which 14 percent is roads, 13 percent is buildings, and nine percent is parking lots. The remaining 64 percent of the study area's land is covered by pervious surfaces, such as grass and soil. Pervious surfaces can be developed, such as yards or gardens, or undeveloped, such as wooded areas (see Figure 4.13).

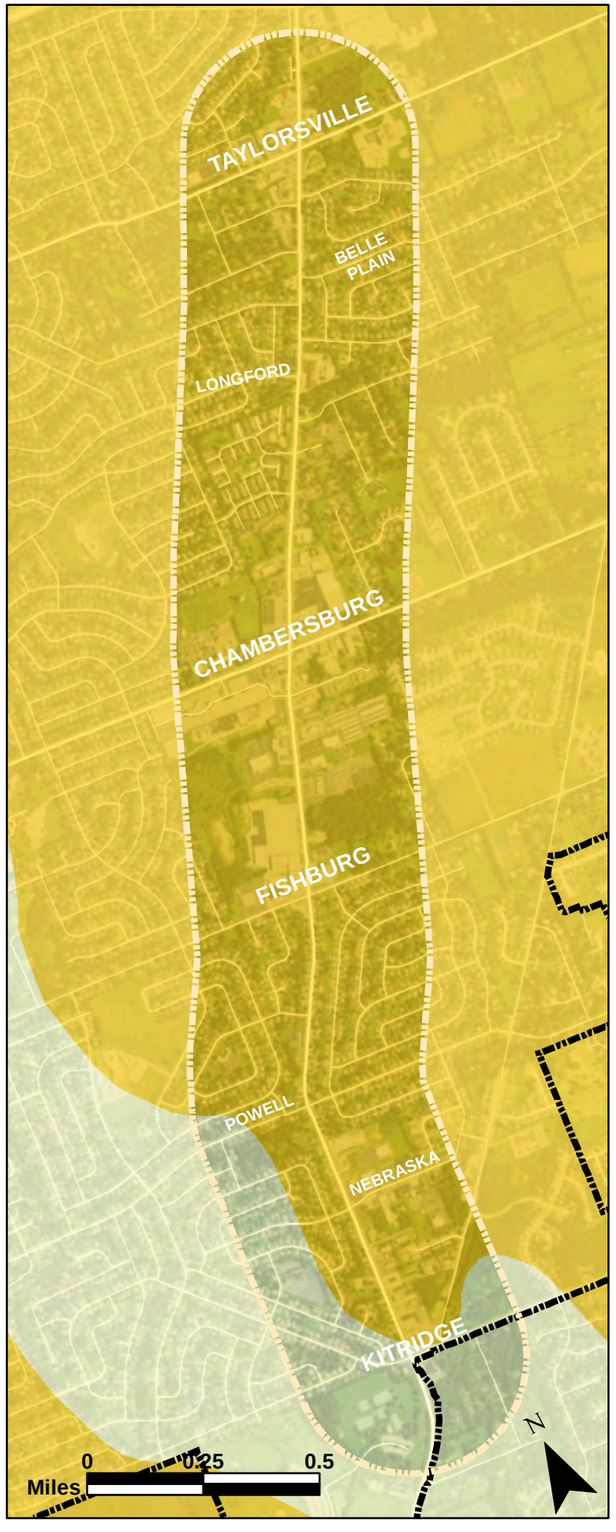


Figure 4.12: Ground Water Pollution Potential

- Low Potential
- Medium Potential
- Roads
- Study Area
- Corporation Boundary

While impervious surfaces are distributed evenly throughout the corridor, pervious, or natural areas, are clustered in several locations:

- The southern terminus of the study area, including a portion of Cloud Park, a wooded area southeast of the Kitridge Road intersection, and small clusters of woods along Bellefontaine Road;
- The center of the study area, around the Chambersburg intersection, including the undeveloped land west of the Marian Shopping Center and south of the Poelking Bowling Center, the athletic field north of Saint Peter School, and the residential neighborhood east of the Goldman shopping center; and
- The northern terminus of the study area, including the wooded areas on the east side of the Pike, both north and south of Taylorsville Road.

The MVRPC uses a composite Ground Water Pollution Potential index to rate the land's susceptibility to ground water contamination. Factors such as depth to water, recharge, soil media, and topography are used to compute an overall pollution potential score. On Brandt Pike, most of the study area is on land with medium potential for groundwater pollution. The southern end of the study area, near Kitridge Road, is in the low potential category. Given the area's potential for ground water contamination, controlling stormwater runoff from impervious surfaces should be considered during future redevelopment efforts.

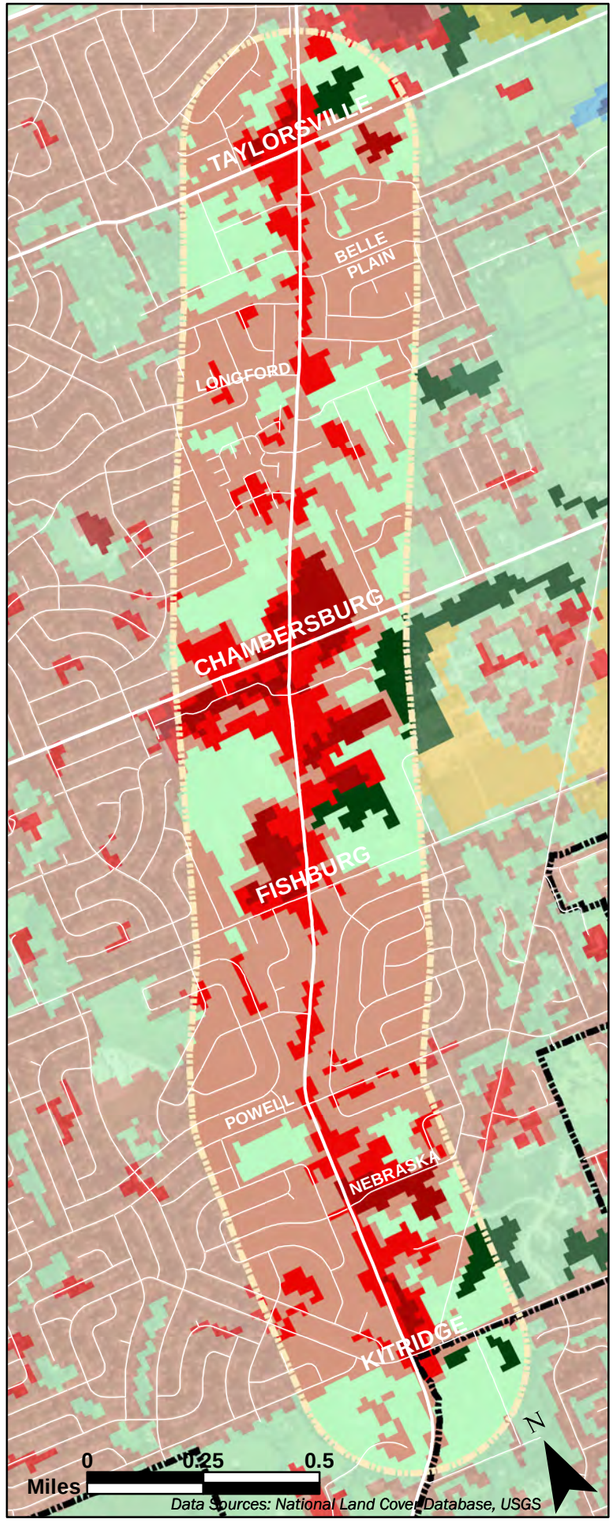


Figure 4.13: Land Cover

- Open Water
- Perennial Ice/Snow
- Developed, Open Space
- Developed, Low Intensity
- Developed, Medium Intensity
- Developed, High Intensity
- Barren Land
- Deciduous Forest
- Evergreen Forest
- Mixed Forest
- Shrub/Scrub
- Grassland/Herbaceous
- Pasture Hay
- Cultivated Crops
- Woody Wetlands
- Emergent Herbaceous Wetlands
- Roads
- Study Area
- Corporation Boundary

Wooded Areas

As Figure 4.13 shows, the amount of land that is covered by development along the corridor far exceeds the amount of land that is undeveloped and that has remained in its natural or partially natural state. Approximately 93.5 percent of the corridor is developed, with 6.5 percent remaining as deciduous, evergreen and mixed forest. This includes an area north and east of the Taylorsville Road intersection, the area south of the Poelking Bowling Center, and an area north and east of the Bellefontaine Road and Kitridge intersection.

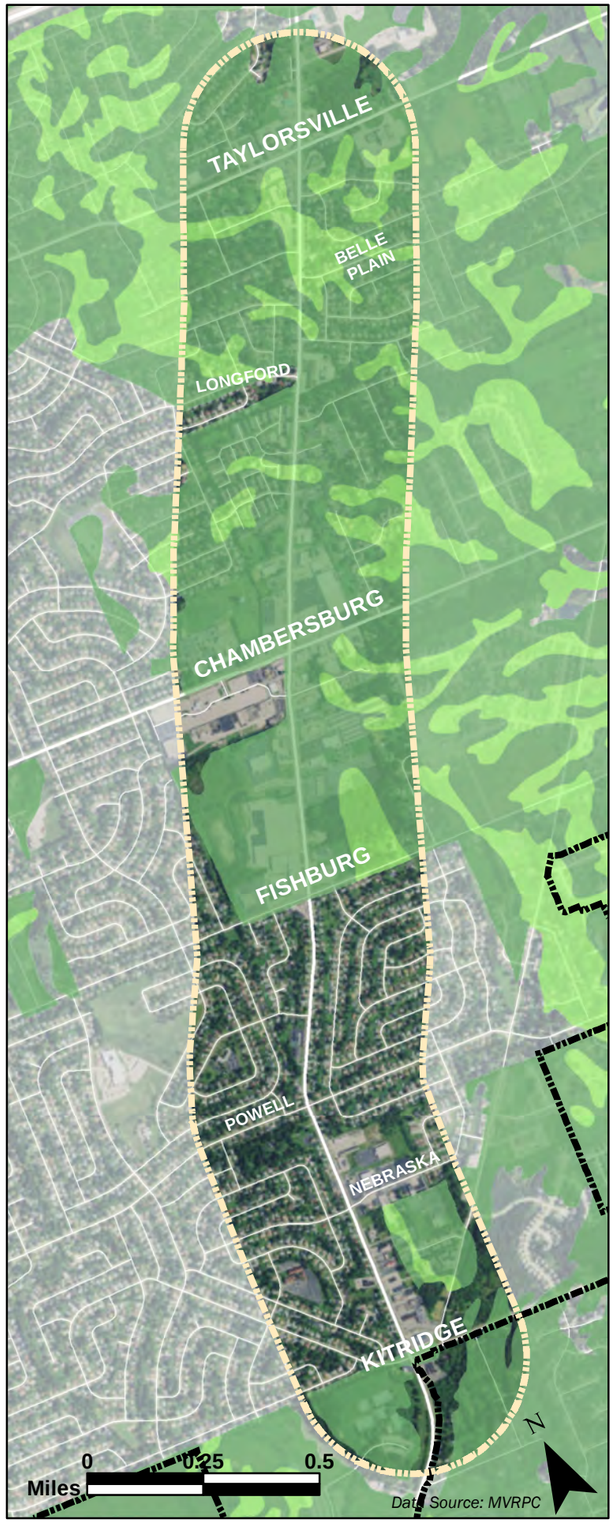


Figure 4.14: Prime Farmland

- Prime Farmland
- Prime Farmland with Conditions
- Roads
- Study Area
- Corporation Boundary

Prime Farmland

Identifying areas where farmland is the most productive is an important first step in understanding potential uses of land that are either underutilized or completely undeveloped. The USDA defines prime farmland as "land that has the best combination of physical and chemical characteristics for producing food, feed, forage, fiber, and oilseed crops and is available for these uses." The MVRPC study classified the farmland into three categories:

- Naturally Prime - All Areas are Prime Farmland and Farmland of Local Importance
- Prime with Conditions - Prime Farmland if Drained, Prime Farmland if Drained and Either Protected from Flooding or not Frequently Flooded, and Prime Farmland if Protected from Flooding or not Frequently Flooded
- Not Prime - Not Prime Farmland

Forty-one percent of the Region's land is naturally prime farmland and 38.3 percent is prime farmland with conditions. Since most of Huber Heights and the area along Brandt Pike is developed, there are only a few undeveloped sites with Naturally Prime Farmland or Prime Farmland with Conditions.

Figure 4.11 shows these sites, which include the recreation fields north of Saint Peter Catholic Church and Saint Peter School, the undeveloped portion of the site south of the Huber Center (both sites Naturally Prime), and the wooded area south of the Poelking Bowling Center (Naturally Prime and Prime with Conditions). There is no land remaining along the corridor that would be considered actively farmed as pasture hay or cultivated crops.

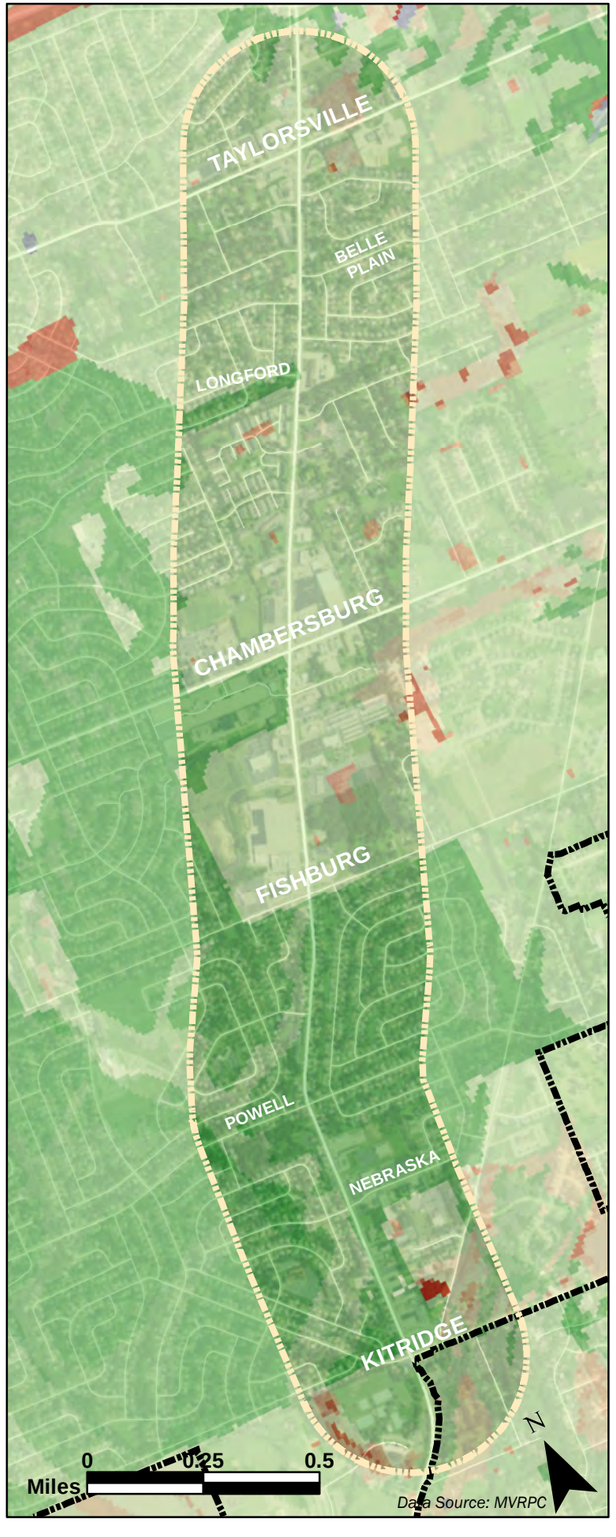


Figure 4.15: Environmental Suitability Measure

- High Development Potential
- Low Development Potential
- Roads
- Study Area
- Corporation Boundary

Natural Environment Suitability

Figure 4.12 shows a composite of the previously described environmental factors, a product of layering the 15 environmental factors into one map to identify areas that are better suited for physical development. With exception of the previously mentioned areas, most of Huber Heights — as well as the Brandt Pike corridor — has high development potential with very few limiting environmental factors.

The lack of significant natural features has not only made development easier, it has also resulted in a lack of a "natural presence" along the corridor.

The lack of significant natural features has not only made development easier, it has also resulted in a lack of a natural presence along the corridor and an imbalance between pervious (undeveloped land) and impervious (buildings, roads, and parking lots) surface. This natural presence along the corridor not only has environmental significance but it also gives a visual context to development, especially with respect to forested areas. Natural features contribute to a sense of orientation and identity in a way that development alone cannot. Every effort should be made to retain land from development that has both environmental significance and contributes to the community's unique character.

Understanding and preserving the natural features along Brandt Pike should play a role in redevelopment efforts, but the existing built environment is more significant in shaping the Pike's future. The built environment is discussed in the next chapter.

Chapter 5: Built Environment

Because revitalization often involves filling in or "infilling" vacant or underutilized land with new buildings, replacing existing structures, or adaptive reuse of existing buildings, it is important to understand the characteristics of the existing Built Environment to discover the most suitable locations for reinvestment. These characteristics include:

- The location and distribution of specific land uses along the corridor, and their relation to the surrounding neighborhoods;
- The availability and capacity of the existing utility system to serve future development; and,
- The physical form that development has taken along the corridor along with examples of how alternative forms of development can aid in revitalization.

Existing Land Use

The most predominant land use along the corridor is single-family, which occupies 57 percent of the land in the study area (Figure 5.1). Single-family occupies the largest percentage of land area primarily because of its relatively low density. As Figure 5.2 shows, single-family uses are not only located within subdivisions on both the east and west sides of the corridor but also on lots fronting on segments of both sides of the Pike.

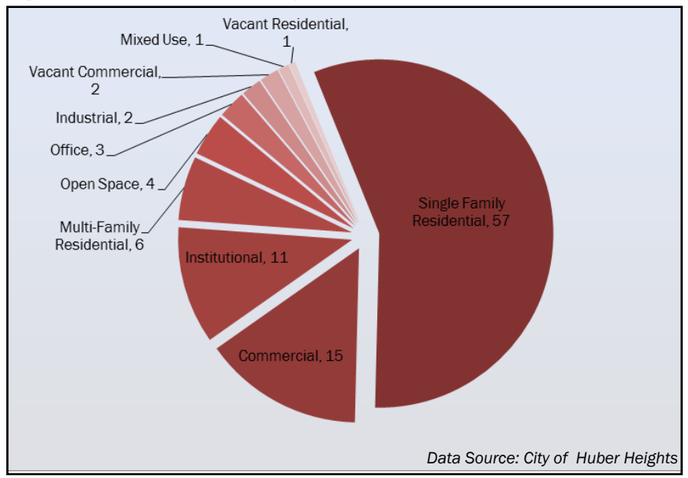
Most of the single-family units (see Chapter 7: Market and Economy) are single story with three bedrooms built between 1956 and 1992, and appealing to a "family oriented" market. This over-reliance on a certain housing type has precluded other forms of housing to develop within the community and along the corridor. For instance, even though almost 15 percent of the population is 65 years or older within the community (and this group is expected to grow rapidly in the future), there is no dedicated dependent/assisted living or independent housing adjacent to the corridor near uses that would serve their daily needs.

Along with residential density, population density — or the total population divided by the land area for a particular census tract — must also be considered during a successful revitalization effort. In this case, the higher the population density adjacent to the corridor, and the more people living within walking distance (0.25 mile), the more likely they will frequent uses along the corridor. As shown in Figure 3.3, the highest population density is on the west side of Brandt Pike, especially at the northwest quadrant of the Chambersburg and Brandt Pike intersection. This higher concentration is due in large part to the multifamily developments between Longford and Chambersburg Roads. Two additional concentrations are found at a far northern tract (northwest quadrant of the Taylorsville and Brandt Pike intersection) and a far southern tract north of Cloud Park.

Commercial uses (which includes retail only and not office) occupy 15 percent of the study area. Most of the land devoted to commercial use, with just a few exceptions, is concentrated at the three major intersections with Brandt Pike:

- Taylorsville Road: A combination of freeway-oriented businesses (restaurants, car dealerships, auto repair) toward the I-70 Interchange, neighborhood retail, and local office uses south of Taylorsville Road.

Figure 5.1: Land Use in the Study Area — Percent



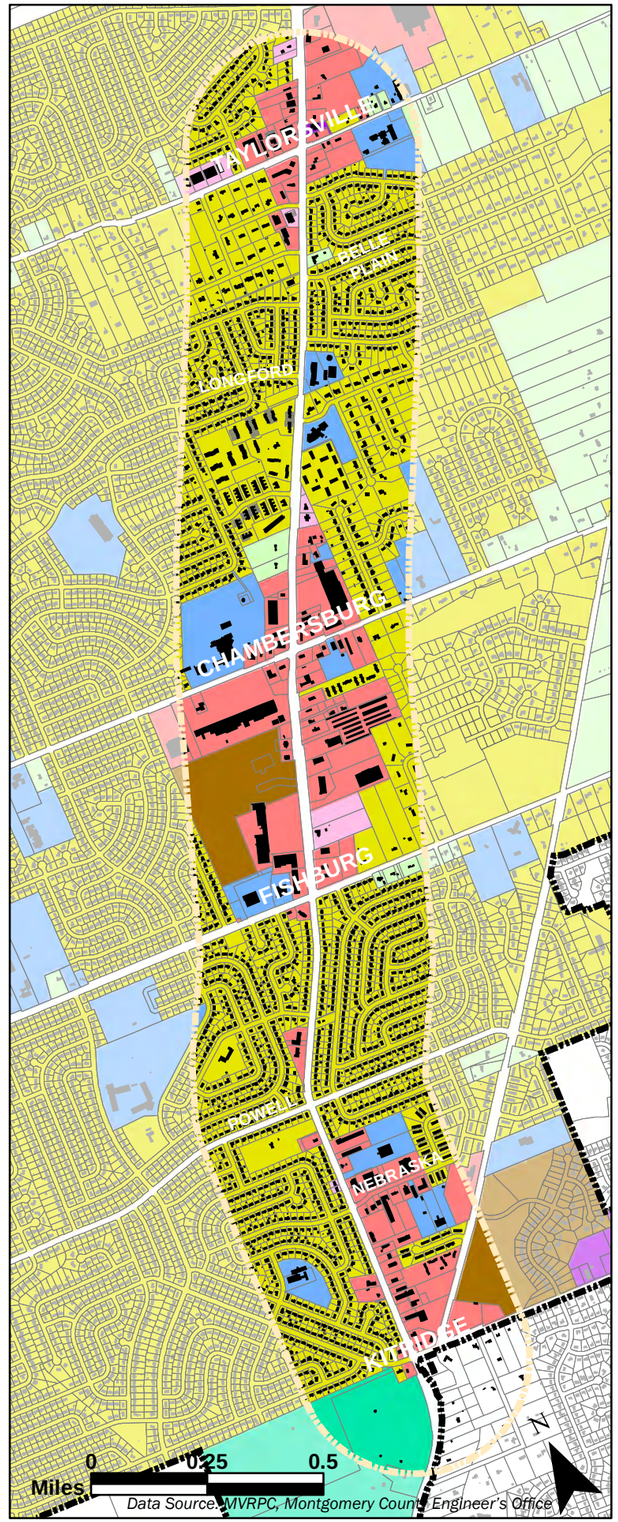


Figure 5.2 : Land Uses

- Buildings: Inside Study Area
- Buildings: Outside Study Area
- Agricultural
- Commercial
- Conservation
- Office
- Industrial
- Mixed Use
- Residential
- Institutional
- Roads
- Study Area
- Corporation Boundary

- Chambersburg Road: Mostly community scale retail as well as a library, church, parochial school, senior center, and restaurants,
- Kitridge Road: A mix of community and neighborhood scale uses, including drug stores and restaurants.

The concentration of commercial land use at the corridor's major intersections — rather than fronting the entire length of the Pike — bodes well for future revitalization. Future redevelopment, if permitted, can continue concentrating at these nodes (on undeveloped or underutilized land), preferably at a higher density. This pattern will allow for more efficient use of the land if developed as a mix of uses — residential and non-residential — in a centralized location relative to adjacent neighborhood uses.

Brandt Pike has more vacant properties than similar commercial corridors in the region. There are approximately 50 vacant commercial spaces along the corridor out of 250 (20 percent), and the average vacancy rate for units within shopping centers along the corridor is around 30 percent.

Most properties in the study area, including vacant buildings, are generally in good repair (Figure 5.3), with some exceptions,

Figure 5.3: Building Appearance

- Poor
- Fair
- Good
- Very Good
- Roads
- Study Area
- Corporation Boundary

such as commercial properties north of Kitridge Road and at Fishburg Road.

Respondents to an online survey identified vacant properties as the number one obstacle to revitalizing Brandt Pike. Blighted and vacant buildings reduce adjacent property values, attract crime, and deter investment. However, they also provide an excellent opportunity to transform the corridor. Many respondents suggested demolishing or renovating vacant buildings and enticing new businesses to occupy vacant lots as part of future redevelopment efforts along Brandt Pike.

If unused buildings were replaced with more contemporary commercial structures, and new businesses continue to cluster around the major commercial nodes mentioned earlier, the commercial land use footprint on the Pike may decrease, allowing more room for open space, multifamily, and civic uses.

Multifamily accounts for six percent of the study area. Most of the corridor's multifamily units are located on both the east and west sides of the Pike between Longford and Chambersburg Road. Most of these developments are not within walking distance of the land uses at the Chambersburg intersection. This distance makes pedestrian access impractical, leaving only auto, transit, or bicycle access. This obstacle is further compounded by the fact that bicycle travel is not well accommodated and multifamily dwellers often own fewer cars per household than single family dwellers.

Open space accounts for less than 4 percent of the land area along the Pike, mostly as a portion of a much larger community park (Cloud Park) at the southwest quadrant of the Kitridge Road and Brandt Pike intersection. According to the Huber Heights 2011 Comprehensive Plan, "the city is gifted with an abundant supply of parks and recreation assets. The city boasts 32 acres of parkland for every 1,000 residents, and has immediate access to many more facilities. The often-accepted ratio is 10 acres per 1,000 residents."

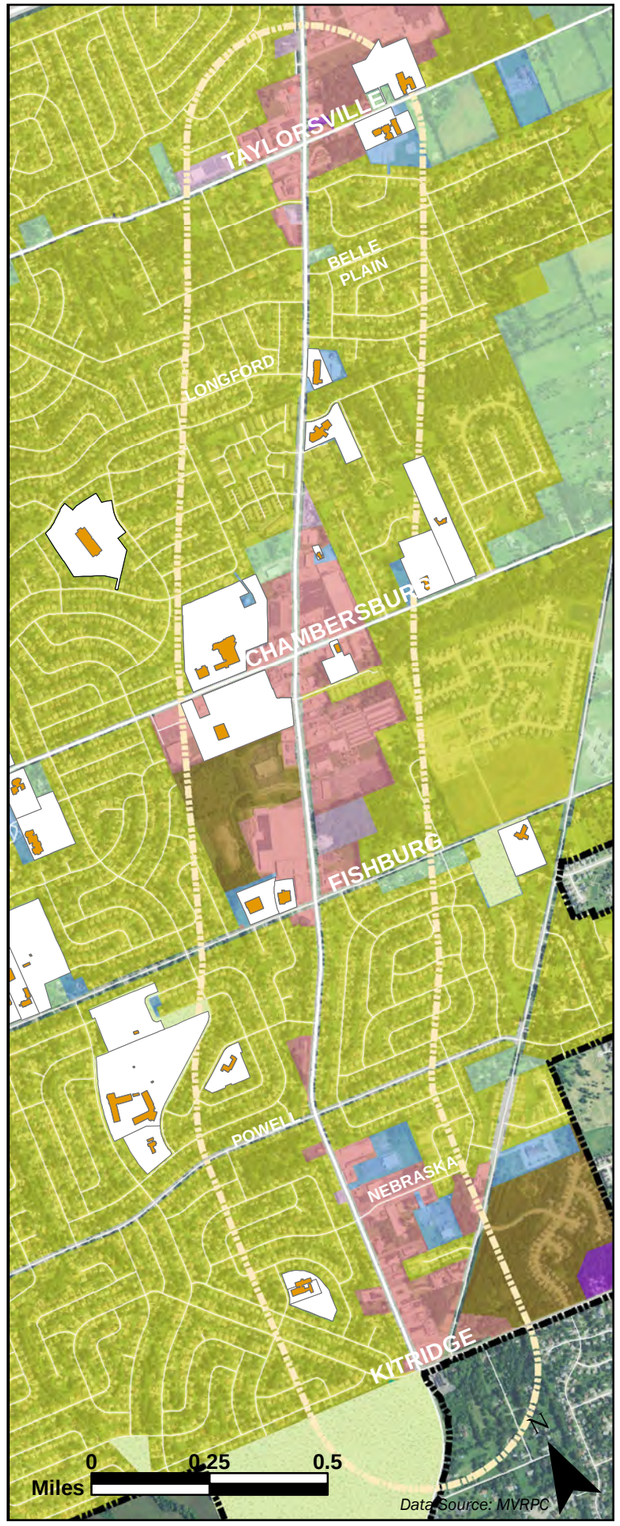


Figure 5.4: Civic Land Uses

- Civic Use Buildings
- Agricultural
- Commercial
- Conservation
- Office
- Industrial
- Mixed Use
- Residential
- Institutional
- Roads
- Study Area
- Corporation Boundary

Although there are several parks within the community, very few are in close proximity (0.25 mile or less) to the corridor. More importantly, there is no central gathering place for the community along the Pike, whether a green, plaza, or square that can be used for a variety of activities. Currently, the parking lot at Huber Center, which hosts a private seasonal Farmer's Market and serves the Dayton Metropolitan Library Huber Heights branch, is the defacto public meeting place along the Pike.

Nearly 11 percent of the study area is occupied by civic and institutional uses (Figure 5.4). With the exception of the YMCA Recreation and Activity Center and the fire station, most of the civic and institutional uses, (including the church, the Dayton Metro Library branch, the senior center, and the City's satellite offices in Huber Center), are located adjacent to the Chambersburg and Brandt Pike intersection.

The remaining occupied land includes office, accounting for three percent of the total land area, and industrial, two percent of the corridor. Most of the office land is used for professional offices, including medical, dental and other businesses.

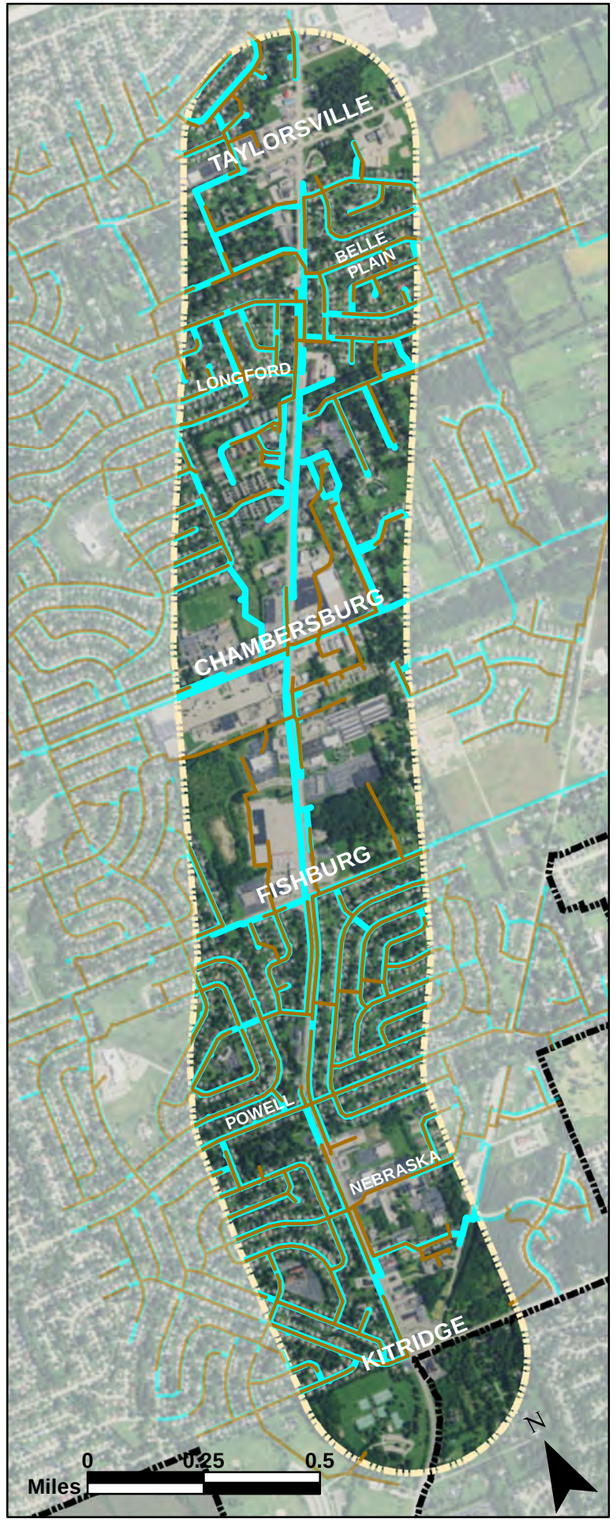


Figure 5.5: Utilities

- Water Lines
- Sewer Lines
- Study Area
- Corporation Boundary

Utilities

According to the 2011 Comprehensive plan, the City of Huber Heights Division of Water and Wastewater provides services in partnership with United Water, the operation and management firm hired to operate the city-owned utilities. The current water and wastewater systems operate under capacity to allow for high demand periods and some growth that could include infill and redevelopment along Brandt Pike. The wastewater is moved to the North Regional Wastewater Treatment Plant located in the City of Riverside. The plant receives wastewater from Huber Heights, Tipp City, and Vandalia.

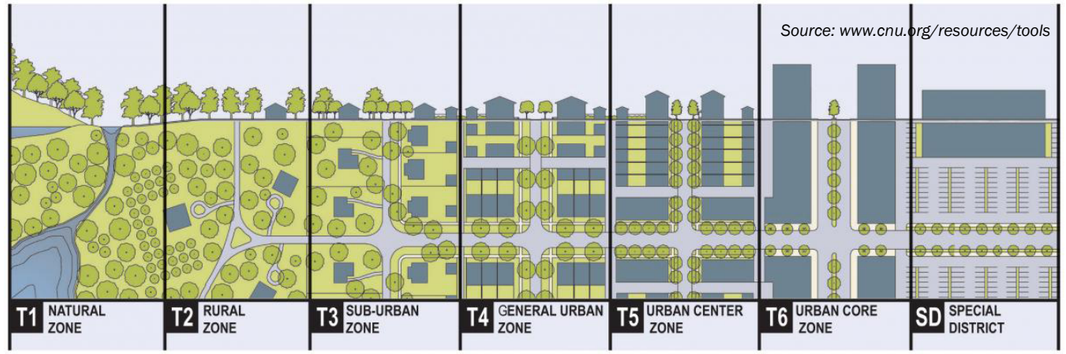
As Figure 5.5 illustrates, the entire corridor has access to water and wastewater. Except for wastewater lines crossing behind Huber Center and Marian Shopping Center, most of the main water and waste water lines are found within the public right-of-way.

Rural to Urban Transect

The corridors physical characteristics — from buildings to parking lots and streets — and how they are arranged on a particular site can be described by their location along a continuum from rural areas to the downtown core (in the Miami Valley Region the core is Downtown Dayton). Figure 5.6 shows the Natural Zone (T1) on the far left and the Urban Core (T6) on the far right. Each zone has unique natural or built features, described below:

- **Natural Zone:** consists of lands approximating or reverting to a wilderness condition, including lands unsuitable for settlement due to topography, hydrology or vegetation.
- **Rural Zone:** consists of lands in open or cultivated state or sparsely settled. These include woodland, agricultural lands, grasslands and irrigable deserts.
- **Sub-Urban Zone:** consists of low density suburban residential areas, differing by allowing home occupations. Planting is naturalistic with setbacks relatively deep. Blocks may be large and the roads irregular to accommodate natural conditions.
- **General Urban Zone:** consists of a mixed-use but primarily residential urban fabric. It has a wide range of building types: single, side-yard, and rowhouses. Setbacks and landscaping are variable. Streets typically define medium-sized blocks.
- **Urban Center Zone:** consists of higher density mixed use building that accommodate retail, offices, rowhouses and apartments. It has a tight network of streets, with wide sidewalks, steady street tree planting and buildings set close to the sidewalks.
- **Urban Core:** consists of the highest density and height, with the greatest variety of uses, and civic buildings of regional importance. It may have larger blocks; streets have steady street tree planting and buildings are set close to wide sidewalks. Typically only large towns and cities have an Urban Core Zone.
- **Special District:** applies to parts of the built environmental with specialty uses that do not fit into neighborhoods. Examples include power plants, airports, college campuses, and big-box shopping centers.

Figure 5.6: Urban to Rural Transect



Buildings in the Natural Zone (see Figure 5.5) are non-existent, because land within this area is made up of wetlands, floodplains, and protected lands. Buildings in the Sub-Urban Zone — the closest example to Huber Heights and Brandt Pike — are setback from the roadway with yard space on all sides. Buildings in the General Urban Zone are placed forward toward the street, are usually taller in height, and have parking located in the rear accessed by an alley. Even though these zones are generally found in a range from the Natural to the Urban Core or Special District, they can also exist alongside one another if the form and use of each building — mass, scale, separation, etc. — are compatible.

Brandt Pike is a very good example of this continuum at work. As Figures 5.7 and 5.8 show, two residential neighborhoods can look distinctly different in how their buildings and streets are arranged, but still be adjacent to the same roadway. Figure 5.6, Sub-Urban Zone, shows a residential area east of Brandt Pike with the buildings setback from a local street and each lot accessed by an individual driveway. Figure

Figure 5.7: Brandt Pike Sub-Urban Zone Example

Figure 5.8: Brandt Pike General Urban Zone Example

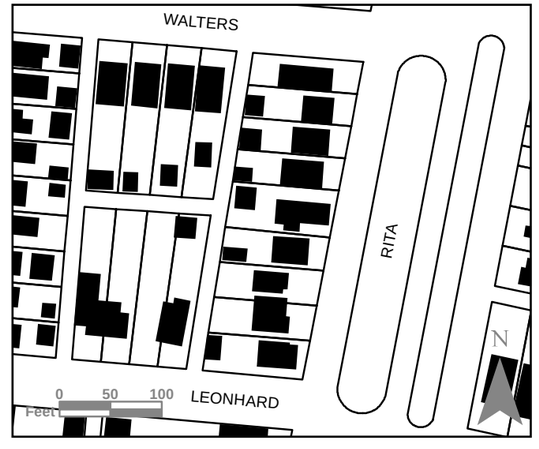


Figure 5.9: Brandt Pike Public and Private Realm

5.7, General Urban Zone, shows a residential area at the far south end of Brand Pike near where it terminates in the City of Dayton's Old North Dayton neighborhood. Notice the use of alleys for driveway access reinforced by a median on Rita Street. This allows for alley access to garages instead of lot frontages interrupted by multiple cuts in the curb for individual driveways.

Private and Public Realms

Within each one of these "Zones" (except for the Natural Zone) are two distinct realms: public and private. The private realm includes structures or buildings, parking lots, driveways, and anything else outside the public right-of-way. The public realm includes sidewalks, tree lawns, and street pavement or anything within the public right-of-way. Figure 5.9 shows the existing private and public realms located along a segment of Brandt Pike. Figure 5.10 shows an alternative private and public realm layout found along a segment of Brown Street in the City of Dayton near the University of Dayton. The recently revitalized area along Brown Street includes a mix of uses and a public and private realm that would be compatible adjacent to Brandt Pike.

Existing and Alternative Development Forms

The general form and pattern of development along the Brandt Pike corridor makes it difficult to walk conveniently and safely between most uses (see Chapter 6) and is at relatively low density/intensity for residential and commercial development. The key to creating more vibrant places along the corridor is developing a land use pattern and built form that is walkable with a mix of uses and at a sufficient density (residential units per acre) to make daily trips on foot, biking, and transit viable.

The following description compares elements listed in Tables 5.1 for each form of development: Sub-Urban (Huber Heights) and General Urban (Brown Street), found in both the private and public realms.

Figure 5.10: Brown Street Public and Private Realm

Private Realm

- **Block Length:** Controlling block length to a range of 300 to 500 feet creates more intersections and pedestrian crossing points and allows movement in multiple directions.
- **Building Type:** Areas with homogeneous buildings reduce the diversity of building size and mass along a block front.
- **Building Height:** Predominantly one-story buildings do not define the public realm as well as multiple-story buildings and restrict the possibility of mixing uses in a single building.
- **Building Placement:** Placing buildings substantially away from the street toward the rear of a parcel detaches activity from the street and makes for a less interesting walk.
- **Parking Type:** Relying heavily on off-street parking increases the amount of impervious surface and reduces the amount of building area that can be accommodated on site.
- **Placement:** Parking in the front of buildings gives auto storage priority over pedestrian travel and is often the result of placing the building toward the rear of the parcel. When used occasionally parking to the side is often better than in the front.
- **Use:** Single-use development increases walking distance between uses and eliminates the opportunity to share parking spaces among multiple uses with opposing peak parking times.
- **Density and Intensity:** Mostly low density residential development gives little support for transit.

Public Realm

- **Street Type:** Commuter routes are necessary to move traffic in and out of the central city during times of peak travel. But entire routes dedicated to auto travel assures that adjacent uses will be mostly auto serving and leave little room for transit and other modes of travel.
- **Tree Lawn:** Serves as a buffer between pedestrians and auto travel and calms traffic.
- **Right-of-Way Width:** Excessive right-of-way width often corresponds to wider pavement.
- **Pavement Width:** Excessive pavement width not only makes for longer pedestrian crossings, but also contributes to higher auto speeds and crash rates.
- **Number of Lanes:** Having more lanes does not necessarily lead to less congestion. Unused capacity could be converted for other forms of travel, including bicycle and transit.
- **Parking:** On-street not only improves parking supply but also services as a buffer between pedestrians and motorists.
- **Bike Lane:** An increasingly popular mode of travel Can be accommodated in several ways depending on the street type and context.

For over five decades, the private realm in areas like Brandt Pike and others throughout the country has evolved with little regard to other travel modes, such as walking, bicycling, and transit. The primary mode of travel, the automobile, has dominated the landscape, creating its own auto-scaled environment of wide, featureless streets and expansive parking lots. Auto-oriented development has separated compatible land uses, requiring most trips to be done by car. The next chapter examines the characteristics of the public realm along Brandt Pike in more detail and shows how it can be designed to be safer for other modes of travel to coexist with automobiles.

Table 5.1: Existing and Alternative Development Features

Private Realm	Existing Development Form (T3)	Alternative Development Form (T4/T5)
Block Length	2,755 feet	300 feet
Building Type	Big Box Commercial/Strip Development	Commercial, Commercial Block Front, Townhomes, etc.
Building Height	One Story	One and Two Stories
Building Placement	Rear Yard	Front Yard
Parking Type	Off-Street, individual property	Off-Street shared between properties and On-Street
Parking Placement	Front Yard	Rear Yard
Use	Single use	Single and mixed-use
Density and Intensity	Low	Low to Moderate
Public Realm		
Street Type	Major Commuter Route	Mixed-Use Street
Tree Lawn	4-6 feet	N/A
Right-of-Way Width	90 feet	63 feet
Pavement Width	62 feet	39 feet
Number of Lanes	Four 11-foot travel lanes with 12 foot continuous center turn lane	2, 11-foot travel lanes with 10 foot alternating center turn lane
Parking	Off-Street	Off and On-Street
Bike Lane	NA	Two-way, 5 foot lanes

Chapter 6: Transportation Environment

Like many suburbs that developed after World War II, Huber Heights was built around the automobile. Millions of Americans were able to afford private vehicles for the first time and cars were viewed as the fastest and most convenient form of travel. At a time when the automobile's myriad negative consequences to society — especially to public health and the environment — were not fully understood or appreciated, cities across the country prioritized infrastructure for private vehicles, to the detriment of other modes.

Roads were widened to accommodate more traffic, while other facilities, like sidewalks and bus stops, were installed as an afterthought. Businesses built acres of parking lots to accommodate their peak volume of customers, which typically occurs just a few times a year, during the holidays. Auto-dependent businesses, such as fast food restaurants, sprouted up at each corner of major intersections, to ensure convenient access for commuters coming from all directions. Highways cut through historic neighborhoods to downtowns, to increase mobility for the driving public.

While these changes may have initially seemed like an improvement, many communities now view them as a cause of decline and a threat to character. Such auto-dominated development creates a dangerous environment for pedestrians, bicyclists, transit users, people with disabilities, and other road users, and engenders a number of systemic problems, from air pollution to obesity.

Although these are common problems in cities across the country, Huber Heights faces unique challenges along its main corridor, Brandt Pike. The project team examined existing conditions within the study area to better understand the transportation environment on Brandt Pike, and to offer recommendations for improvements.

The chapter presents data and analyses related to the following areas:

- Roadway geometry
- Traffic volumes
- Public transportation
- Freight
- Pedestrian environment
- Bicycle facilities
- Access management
- Parking

These data were collected during site visits, stakeholder interviews, reviews of existing plans and policies, walk and bicycle audits, and public meetings. Additional data were obtained from the Miami Valley Regional Planning Commission (MVRPC), the Greater Dayton Regional Transit Authority (RTA), and the Ohio Department of Transportation (ODOT), Data included local travel behavior, transit ridership, congestion, and more.

This exercise revealed the transportation network's strengths and weaknesses. It also provided a baseline evaluation of the corridor, against which future progress may be compared.

A survey regarding transportation and economic issues in the study area was distributed to the public. Survey results are summarized in Appendix II. Analysis of particular survey responses relating to the transportation areas listed here is referenced throughout the chapter.

Roadway Geometry

Street networks planned on a grid are safe and convenient for road users, allowing easy navigation. Perpendicular intersections create simple and direct crossings for pedestrians, clear sight lines, and are more intuitive to use than irregular intersections.

Brandt Pike is oriented northeast/southwest; the road skews about 25 degrees east of true north. Diagonal roadways that intersect due east-west roads create irregular, skewed intersections and dangerous conditions for road users. Some minor roads (such as Rye, Longford, Highbury, and Stonehurst) are designed to form regular, right angled intersections with Brandt Pike, but all major intersections north of Powell Road are skewed. These intersections, particularly at Chambersburg and Taylorsville Roads, see heavier traffic volumes and more pedestrian activity than the rest of the corridor.

Skewed intersections reduce sight distances for all users and increase crossing distances for pedestrians. Wide angles create large curb radii, which encourage high-speed turning movements. These conditions reduce the likelihood that drivers will yield to crossing pedestrians. 40 percent of pedestrian crashes occur at intersections[1], and primarily involve conflicts with turning vehicles; skewed intersections increase the risk in already dangerous areas.

The project team observed interactions between pedestrians and motorists during site visits. At major intersections, including Fishburg and Chambersburg Roads, turning vehicles did not yield to pedestrians attempting to cross during the walk phase, in part because vehicles navigated shallow turns at high speeds.

Realigning major intersections along Brandt Pike to correct skewed intersections would be unfeasible. However, several cost-effective approaches can modify skewed intersections to make them safer and more navigable for all road users. These strategies are discussed in Chapters 9 and 10.

1. Lord, D., Smiley, A., and Haroun, A. *Pedestrian Accidents with Left-Turning Traffic at Signalized Intersections: Characteristics, Human Factors and Unconsidered Issues.*

Figure 6.1 & 6.2: Skewed intersections create longer crossing distances.

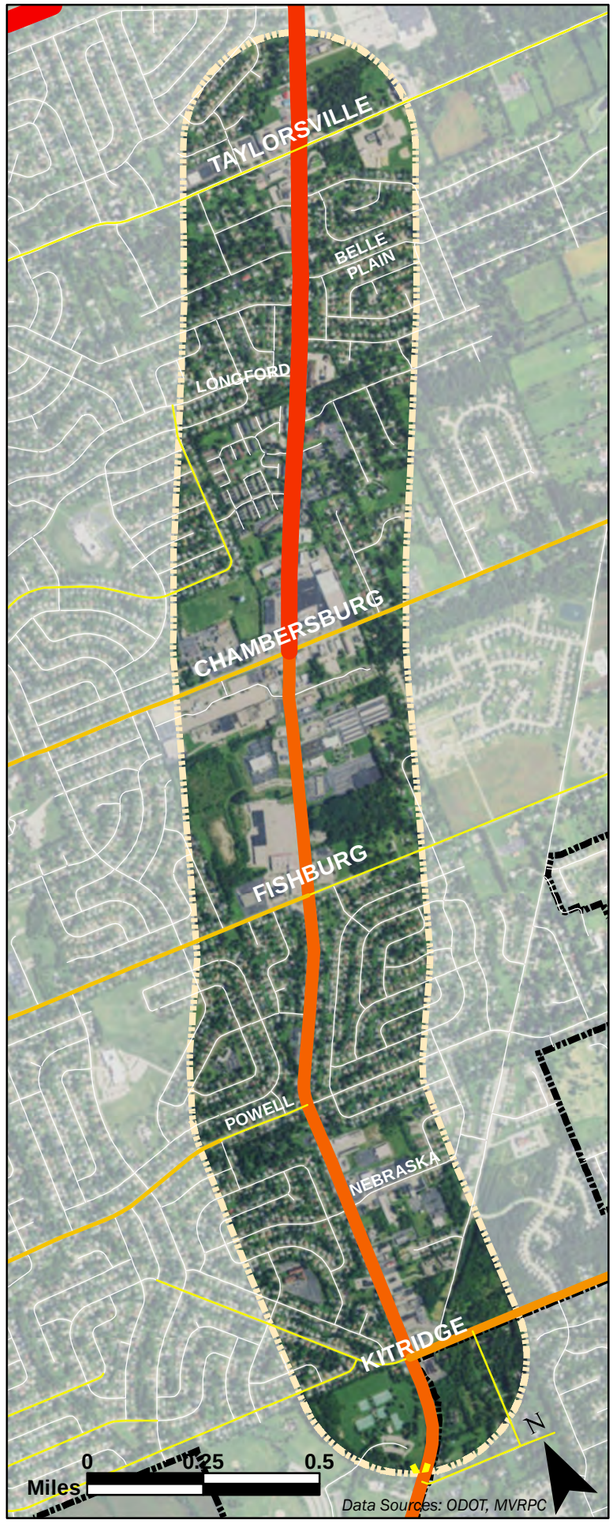


Figure 6.3: Traffic Volumes (2014)

Average Annual Daily Traffic
- ≤ 5,000
- 5,001 - 10,000
- 10,001 - 15,000
- 15,001 - 20,000
- 20,001 - 25,000
- > 25,000
- Roads
- Study Area
- Corporation Boundary

Figure 6.4 & 6.5: Traffic on Brandt Pike.

Traffic Volumes

Average Annual Daily Traffic, or AADT, is the total annual volume of vehicle traffic on a road divided by 365 days. Brandt Pike's AADT (Figure 6.3) from the southern corporation boundary to Chambersburg Road was 15,035 in 2014. With regards to traffic volumes, the southern portion of Brandt Pike resembles a major arterial, similar to other roads in the region such as N Dixie Drive and National Road on the north side of Dayton, Far Hills Ave on the south side, and Edwin C Moses Blvd in central Dayton.

By The Numbers: AADT

***15,035** = Southern corporation boundary to Chambersburg Road (2014).*

***21,050** = Chambersburg Road to I-70 (2014).*

Volumes are heavier north of Chambersburg Road to I-70, where 2014 AADT was 21,050. The highway interchange, busier shopping centers, and medium-density residential neighborhoods contribute to traffic. This segment of Brandt Pike is closer to a state highway in traffic volume. In the Miami Valley region, the only major arterials and state routes that carry more traffic than this segment of Brandt Pike are Main St/SR 48 south of the I-70 interchange (26,776 AADT), Springboro Pike/SR 741 in Miamisburg (24,873 AADT), Fars Hill Ave/SR 48 in Centerville (41,801 AADT), and SR 4 in Huber Heights, south of the I-70 interchange (26,276 AADT).

Historical traffic count data for Brandt Pike (Figure 6.6) show a peak volume of 23,250 in 2006, followed by a modest decline over the following decade. In the four years since 2013, for which directional count data are available, southbound traffic was consistently higher than northbound traffic. This trend indicates that the I-70 interchange with Brandt Pike may be a major entryway into Huber Heights and points south, while northbound traffic may be more dispersed across the network.

Many respondents to the online survey perceive the corridor as congested, and claim to avoid the area during peak hours. Some respondents expressed a desire to see reduced traffic volumes and speeds on the Pike, and better signal timing to improve traffic flow.

"I do my best to avoid that entire area due to traffic during peak times."

Figure 6.6: Brandt Pike historical traffic count data.

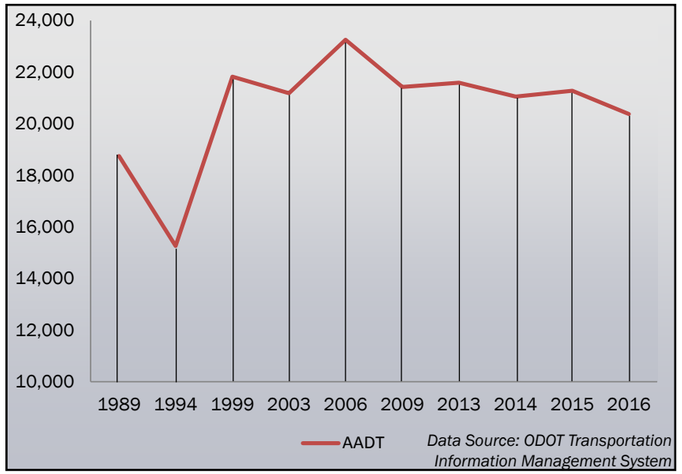


Figure 6.7: Public Transportation

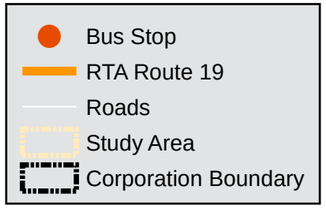


Figure 6.8: Poorly placed bus stop sign.

Figure 6.9: Bus stop with bench.

Public Transportation

The Greater Dayton Regional Transit Authority serves the Cities of Dayton, Huber Heights, and other areas of Montgomery and Greene Counties. The system covers about 1,000 miles of directional roadways and operates one route along Brandt Pike. The #19 travels from Miamisburg north through Dayton and Huber Heights. It terminates just north of the study area, in the Meijer grocery store parking lot northwest of the I-70 interchange. The route makes one deviation off of Brandt Pike through the Sulphur Grove Shopping Center. The #19 has an off peak headway of 60 minutes and a peak headway of 30 minutes.

By The Numbers

***21** = Bus stops in the study area.*

***5** = Average number of boardings (2015).*

***7.4** = Average number of alightings (2015).*

Figure 6.7 shows transit routes and stops in the study area, as well as average daily boardings and alightings by stop along Brandt Pike for the second quarter of 2015. There are 21 bus stops, nine northbound and twelve southbound. Two stops have a shelter (southbound, south of Chambersburg Road and south of Leyden) and three stops feature benches (all southbound, north of Chambersburg Road, south of Good Samaritan Way, and south of FIshburg Road) with concrete pad waiting areas. The remaining stops consist of signs affixed to freestanding posts or existing infrastructure (telephone or utility poles), three of which have concrete pads. Several of these signs are placed 15 feet or more from the ground, above a pedestrian's immediate field of vision.

The busiest bus stop is northbound at Channingway Court, just south of Chambersburg Road and across from Huber Center. High ridership reflects the high-density development at that node. Other high ridership stops include both north and southbound stops at Nebraska Avenue and at Kitridge Road.

Business owners responding to the survey reported that less than one percent of their employees and customers arrive by bus.

Freight

Freight traffic does not have a heavy presence on Brandt Pike. Most truck traffic is likely local, delivering supplies to retail stores or gas stations along the corridor. Other freight carriers likely bypass the corridor in favor of express routes, such as SR 4, I-70, and I-75. The most recent data (2009) show business/commercial vehicles — FHWA Class 4 and above — comprise four percent of AADT, roughly 900 vehicles per day[1]. Other state highways and major arterials carry a higher percentage of freight: SR 4 carries 10 percent and I-70 carries upwards of 31 percent freight through Huber Heights.

2. *ODOT Transportation Information Management System*

Figure 6.10: Bus stop with shelter.

Figure 6.11: RTA bus on Brandt Pike.

Figure 6.12: Truck traffic on Brandt Pike.

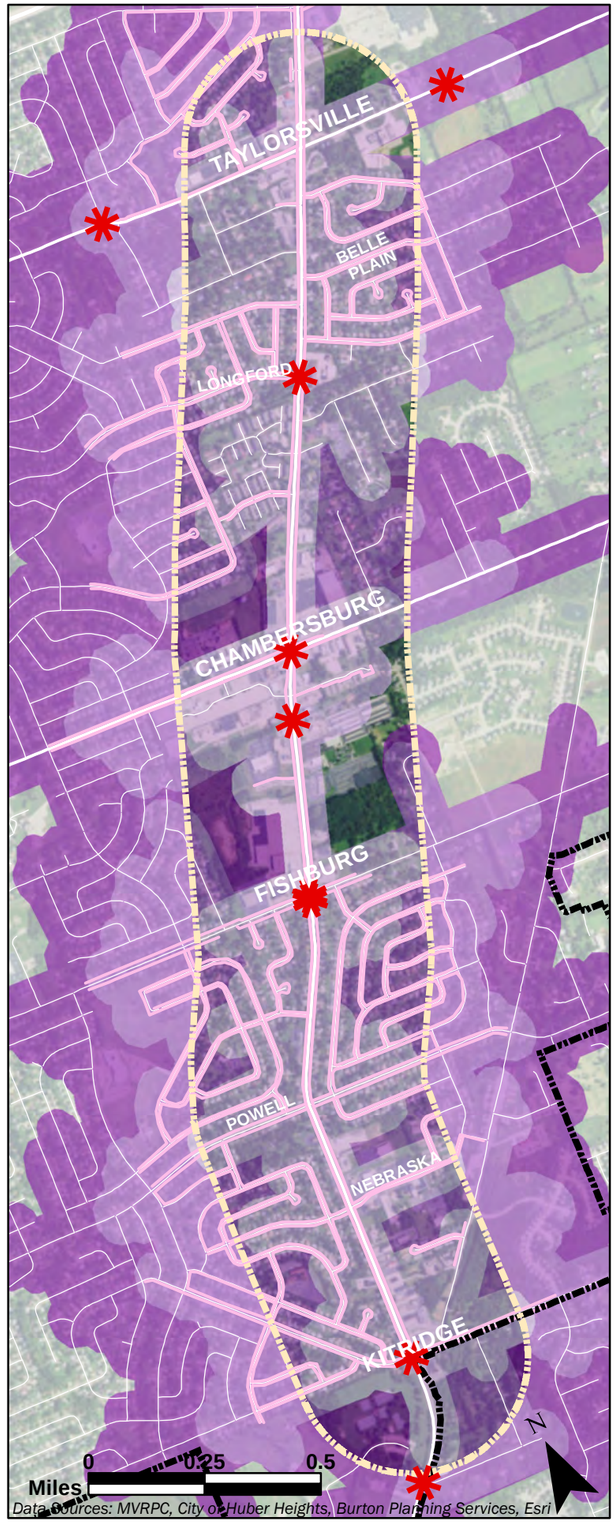


Figure 6.13: Pedestrian Environment

Walk time from Brandt Pike
- 5 Minutes
- 10 Minutes
- 15 Minutes
- Pedestrian Injury Crash
- Sidewalks
- Roads
- Study Area
- Corporation Boundary

Figure 6.14: Square miles covered within walking distances of Brandt Pike.

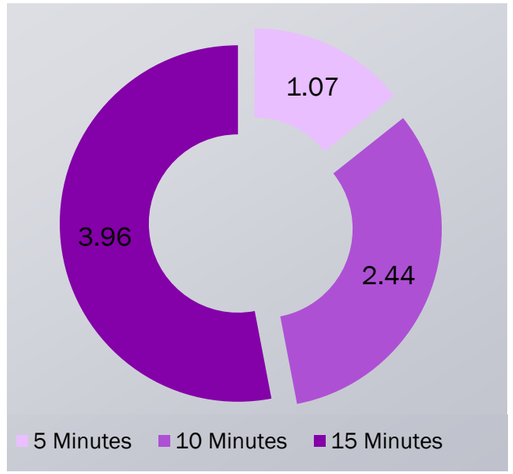


Figure 6.15: Landscaped sidewalk.

Pedestrian Environment

Due to the historical and ongoing dominance of the automobile as the preferred mode of travel along Brandt Pike, the pedestrian environment offers little comfort or convenience to those on foot. Most would-be pedestrians choose to travel by car due to safety concerns. Prior to their participation in public involvement activities, almost everyone had only experienced the Pike through the windshields of their private vehicles. Among survey respondents that live within a quarter mile of Brandt Pike, 97 percent usually drive to destinations on the Pike.

Figures 6.13-6.14 show the walking environment in the study area. Brandt Pike has sidewalks on both sides of the street the entire length of the study area. Sidewalks do not extend south of Kitridge Road, where there is a 0.8 mile gap in pedestrian facilities until Needmore Rd. On the northern end, sidewalks terminate south of the I-70 interchange and resume on the west side of SR-201 north of the interchange, extending to the corporation boundary.

Sidewalks are four to six feet wide along the corridor and are well-maintained, with occasional overgrowth from adjacent properties. During field work, the project team observed that the City of Huber Heights had given notice to certain properties whose tree lawns were overgrown or poorly maintained.

Sidewalks are four to six feet wide along the corridor.

Survey respondents suggested that wider sidewalks would encourage more people to walk along the Pike. A six to ten foot tree lawn separates pedestrians using the sidewalk from traffic on Brandt Pike. Tree lawns lack landscaping along most of the corridor. In some areas, north of Fishburg Road for example, street trees separate the sidewalk from adjacent land uses, primarily parking lots. Because these natural barriers are placed outside the right-of-way, rather than in the tree lawn between the sidewalk and the road, they do not protect pedestrians from traffic. Along some of Brandt Pike's residential blocks, north of Powell Road and south of Fishburg and Taylorsville Roads, for example, mature trees on private residential property shade portions of the sidewalk. On most of the corridor, however, pedestrians are exposed to the elements. The existing streetscape does not adequately shield them from fast-moving traffic or the wide swathes of surface parking on either side of the road.

All signalized intersections along the corridor have pedestrian signals.

ADA compliant curb ramps with truncated dome mats are installed at all major crossings and most minor crossings. Most signalized crossings have crosswalks on all four legs of the intersection. All signalized intersections along the corridor have pedestrian signals. Signal timing and phasing varies, but at most intersections, an able-bodied individual can cross the street in the allotted time, depending on the amount of traffic. Most intersections also feature pedestrian pushbutton signals. At some intersections, such as Stonehurst Drive, pushbuttons give audio and visual feedback to the user when activated. Most pushbuttons, however, have not been updated with these features. Some pedestrian pushbuttons are placed too far from the sidewalk to allow convenient access for people with disabilities.

Pedestrian signals are automatically activated when parallel traffic along Brandt Pike receives a green

Figure 6.16: Street trees near the intersection with Fishburg Road.

Figure 6.17: Poorly placed pedestrian pushbutton.

light. But pedestrian signals do not remain green for the entire cycle. At Nebraska Avenue, for example, the pedestrian signal allowed for a 15 second crossing time, compared to 43 seconds for parallel traffic.

Virtually all business owners responding to the survey reported that none of their employees walk to work and 1.5 percent of their customers arrive on foot. Business owners identified landscaping, improved lighting, benches, high-visibility crosswalks, and sidewalks that offer a greater degree of separation from adjacent traffic as roadway improvements that might encourage people to walk to their businesses.

Walkscore.com gives Huber Heights an overall walking score of 24 out of 100 (a higher score indicates greater walkability), although most segments of Brandt Pike score above 45. The area around Brandt Pike and Chambersburg Road received a score of 53, because some errands can be accomplished on foot.

Walkscore.com gives Brandt Pike and Chambersburg Road a 53 percent.

As Figures 6.13-6.14 show, a significant area can be reached within walking distance of Brandt Pike. A five minute walk from the Pike covers one square miles, 2.4 square miles can be covered within a 10 minute walk, and four square miles can be covered within a 15 minute walk. Yet, despite these coverage areas, a robust sidewalk network, and a relatively comprehensive array of pedestrian amenities at intersections, the vast majority of road users on Brandt Pike choose to travel by car, and not foot. The hostile walking environment on the Pike stems not from a lack of infrastructure, but from the overwhelming presence of vehicles on and around the roadway. Along many parts of the Pike, pedestrians are flanked by parking lots and frequent curb cuts on one side, and multiple lanes of fast-moving traffic on the other side. These challenges became evident when the project team walked the area with residents, equipped with local expertise and an on-the-ground perspective.

Figure 6.18: A motorist blocking the crosswalk.

Walk Audits

As part of the community workshop held on November 15-17, the project team led community members on a series of walk audits along Brandt Pike.

Walk audits, also called walkability assessments or walk studies, supplement quantitative mapping and statistical analyses with a more nuanced understanding of pedestrian environments. Residents and city staff shared local knowledge about the challenges that pedestrians face along the Pike, and the project team offered possible countermeasures to improve pedestrian safety, convenience, and comfort.

Walk audits offer a more nuanced understanding of pedestrian environments.

Participants scored each segment of the walk based on several factors: pedestrian facilities (sidewalks, curb ramps, crosswalks, push buttons, and pedestrian signals), adjacent land use, and presence of motorized traffic. These factors affect the sense of real and perceived risk that pedestrians feel in auto-dominated environments. Most segments scored a two or three on a scale of five, although certain areas were rated a one. Participants' observations are recorded below.

Motorists did not expect to encounter pedestrians on Brandt Pike, especially in a large group. Some motorists seemed to assume that the roadway's auto-oriented environment entitled them to priority access over pedestrians. For example, at a red light, one motorist stopped in the crosswalk, pushing pedestrians further out into the intersection, towards traffic (Figure 6.18).

Figure 6.19: Entering the crosswalk at Chambersburg Road, countdown in progress.

At the intersection with Chambersburg Road, a turning vehicle did not yield the right of way to the group as they attempted to use the crosswalk. The group proceeded after waiting for the car to turn, but the pedestrian countdown gave them little time to clear the intersection (Figure 6.19).

While crossing over the Pike's many commercial driveways, pedestrians had to detour around cars that pulled into the sidewalk zone while waiting to exit parking lots (Figure 6.20). Many of the curb cuts between Fishburg and Longford Roads provide access to strip centers and other large commercial developments. These driveways are designed more like roads, with separate marked turn lanes, double yellow centerlines, and large curb radii that encourage turns at high speeds (Figures 6.21-6.22). Such features increase crossing distances for pedestrians and fragment the sidewalk network. Along some segments near Chambersburg Road, the group crossed over five commercial curb cuts within several hundred feet of the intersection.

While the group traversed frequent private driveways, both commercial and residential, the number of public roads that the group crossed was very small, indicating long blocks between roads. Excluding Good Samaritan Way, which functions as a driveway for the medical facility, the afternoon walk audit did not cross any public roads. In the evening, the group planned to walk north to Longford Road, cross at the light, and turn back towards Chambersburg. But at 3,100 feet, the distance between Chambersburg and Longford Roads was too long, and the group turned around before reaching Longford.

Short blocks measuring 300-500 feet create connected street grids that are easier to navigate for pedestrians and offer them more route options. Block lengths on Brandt Pike are much greater: 2,700 feet between Fishburg and Chambersburg Roads, for example, nine times the recommended length (Figure 6.23). Long blocks with no midblock crossings confine pedestrians to one route and lead to risky behavior for pedestrians who need to cross midblock.

Most buildings on the Pike feature parking in front, and are setback from the road. Some smaller establishments are 60 feet or less from the sidewalk, but at major commercial centers, such as Marian Shopping Center, building entrances are almost 400 feet from the sidewalk (Figure 6.24). This distance forces pedestrians to cross a sea of pavement before reaching their destination. It also creates a wide gap

Figure 6.20: A motorist blocking the pedestrian zone while waiting to exit a parking lot.

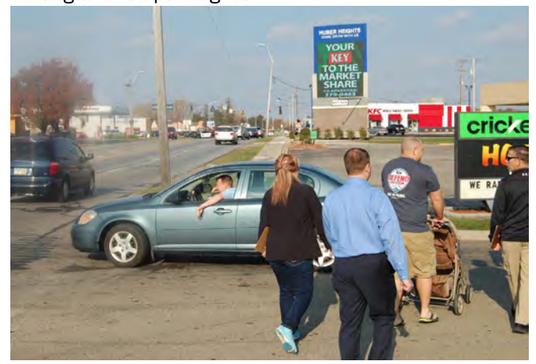


Figure 6.21: This driveway is designed and used like a road.

Figure 6.22: Many curb cuts have large curb radii encouraging fast turns across the pedestrian zone.

between street activity, such as transit stops and people using the sidewalk, and the services that adjacent land uses have to offer. For example, the Dayton Metro Library Huber Heights Branch main entrance is over 380 feet from the sidewalk on Chambersburg Road.

Survey respondents and participants at the workshop agreed that in addition to long distances between the road and business entrances, the distances between most businesses along the Pike precluded walking between them as well. This setup encourages people to remain in their cars, parking multiple times along the Pike in one trip, and contributing to the many turning movements in and out of parking lot entrances.

Although Brandt Pike's sidewalk network extends the length of the study area, in most cases, it does not connect to adjacent destinations. This "last mile" gap between the publicly maintained sidewalk network and privately owned businesses creates major obstacles for pedestrians. For example, at Huber Center, the group had to walk in the driveway, in front of vehicles and on an uneven surface, to reach the shopping center's main buildings (Figures 6.25-6.26). Business owners responding to the survey cited lack of sidewalks as an access management problem.

If pedestrians are not provided with adequate facilities, sometimes they create their own. This was also evident at Huber Center, where a dirt trail, or goat path, delineated the fastest and most convenient route into the center for pedestrians approaching from the south. (Figures 6.27-6.28).

Participants with strollers were able to navigate the curb ramps at intersections. However, most intersections featured only one ramp per corner, which was not aligned with either crosswalk leg. These ramps would direct a visually impaired pedestrian into the middle of the intersection, rather than the crosswalk (Figure 6.29). Each ramp should align with one crosswalk segment, such as the ramps at the intersection of Good Samaritan Way and Brandt Pike (Figure 6.30).

The project team led one walk audit in the dark, to discover what unique challenges pedestrians face on the Pike at night. Auto-scaled lighting (high poles facing the road) did not illuminate the sidewalk or adjacent land uses, leaving the group to navigate the sidewalk in the dark. While the roadway was overly-illuminated for auto use, participants agreed that properties along the Pike were not illuminated enough (Figure 6.31). At nighttime, darkened strip centers and vacant properties invite crime and deter street level activity. In contrast, well-lit building facades with engaging storefronts (such as window displays facing the sidewalk) act as beacons of activity for pedestrians in the dark. On Brandt Pike, gas stations and fast food restaurants — auto-oriented businesses — were highly illuminated at night.

Figure 6.23: Tick marks spaced at 300 feet, marking the ideal block length for a pedestrian-friendly environment.

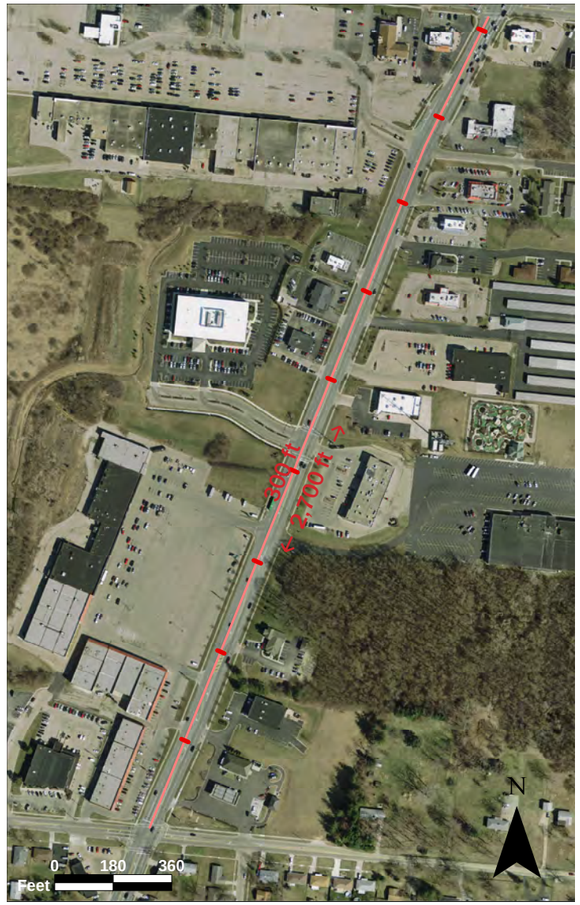


Figure 6.24: These buildings are set almost 400 feet back from the sidewalk.

Figure 6.25: There is no sidewalk connection between these buildings and the road.

Figure 6.26: Pedestrians must share this surface with vehicles.

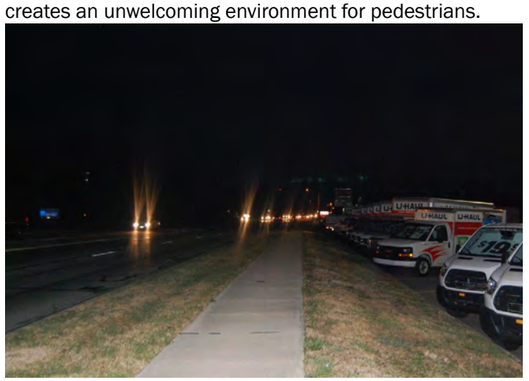
Figure 6.27: A goat path indicates a lack of convenient pedestrian access.

Figure 6.28: The goat path (green) provides better access to the buildings than existing sidewalks (red).

Figure 6.29: This curb ramp is oriented towards the center of the intersection, not the crosswalk.

Figure 6.30: The curb ramps at Good Samaritan Way are aligned with the crosswalks.

Figure 6.31: A lack of lighting on parts of Brandt Pike creates an unwelcoming environment for pedestrians.



Bicycle Facilities

The Miami Vally has an extensive regional trail system, Since 1976, when the first section of paved trail opened along the Great Miami River in Downtown Dayton, the network has expanded continuously. It now has over 300 miles of trails, the largest regional paved trail system in the country. Proposed bikeways in the Miami Valley Comprehensive Local-Regional Bikeways Plan would double the network's size over the next 15 years.

The Great Miami River Trail skirts around the western edge of Huber Heights, connecting Dayton and Piqua. Other nearby bikeways include the Mad River Trail, several miles south of the City, the Little Miami Scenic Trail, ten miles east, and the Ohio to Erie Trail, 13 miles southeast. While Huber Heights is surrounded by this trail system, there are few bicycle facilities within city limits. A proposed bikeway would run along Bellfontaine Road, continuing onto Palmer Road and terminating at New Carlisle. This bikeway would connect to the Great Miami River Trial via a trail running east-west through the Carriage Trails development on the north side of the City.

Several on-street routes, designated by the City of Dayton, terminate at or near the Huber Heights corporation boundary. However, these routes, on Brandt Pike and Old Troy Pike, may simply consist of wayfinding or share the road signage, with "expert" difficulty levels that would deter most bicyclists. Although major roads in Huber Heights are not suitable for novice or intermediate bicyclist use, the City's network of residential streets can safely accommodate bicyclists in most areas.

On Brandt Pike, fast-moving traffic and no bicycle facilities discourage bicyclists from using the road. Very little bike traffic was recorded during several hours of observation along the Pike, and all bicyclists used sidewalks and crosswalks to navigate the corridor. Most bicyclists are uncomfortable traveling with motorized traffic at speeds above 35 mph, the posted speed on Brandt Pike. Traffic regularly exceeds this speed, due to wide lanes and the highway-like character of the road.

Bicyclists face several hazards when traveling in the sidewalk instead of the road, although they may feel safer. Motorists do not expect to see fast-moving bicyclists on sidewalks, and may not be looking for them as they enter or exit curb cuts along the corridor. If bicyclists cannot stop quickly enough, they may collide with turning vehicles. Further, uneven surfaces or debris on the sidewalk can cause falls. Bicyclists are a hazard themselves for pedestrians using the same space.

Figure 6.32: Bicycle Facilities

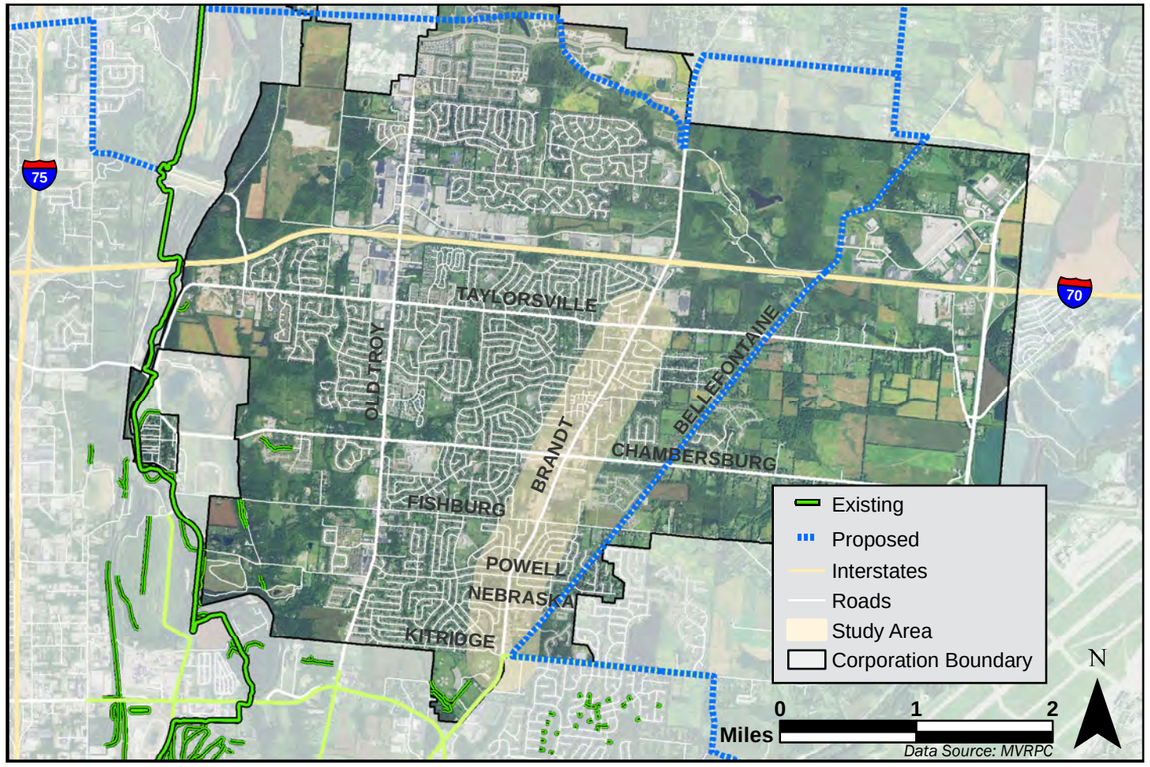


Figure 6.33: A bicyclist using the crosswalk at Chambersburg Road.

Access Management

Due to the high concentration of businesses and homes on Brandt Pike, there are frequent curb cuts along the entire corridor. Curb cuts are evenly divided between single-family residential driveways and access points for parking lots, drive-through businesses, and other driveways. Figures 6.36-6.38 on the following page show residential and commercial curb cuts in the study area, divided into three segments: south, mid, and north.

On the west side of the street, curb cuts account for roughly 22 percent (0.7 miles) of the corridor from Kitridge Road to I-70; on the east side, they account

Figure 6.34: There are 25 curb cuts on this 0.3 mile segment of Brandt Pike, north of Kitridge Road.

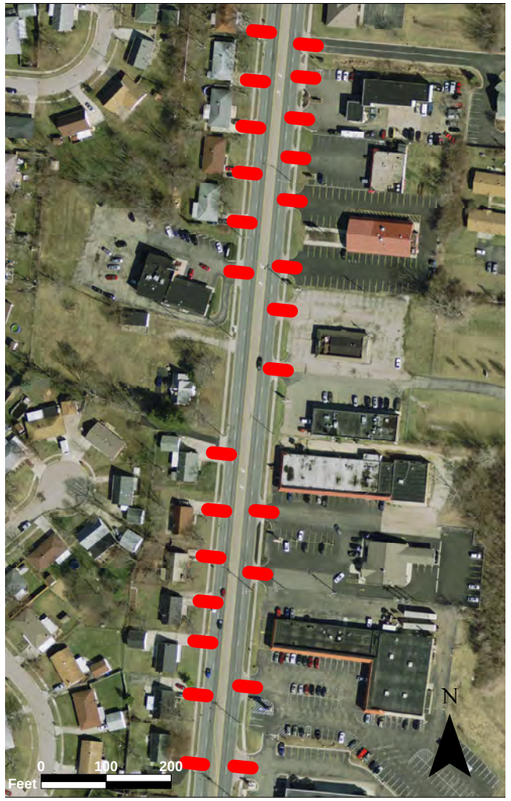


Figure 6.35: Curb cuts as percent of road segment length.

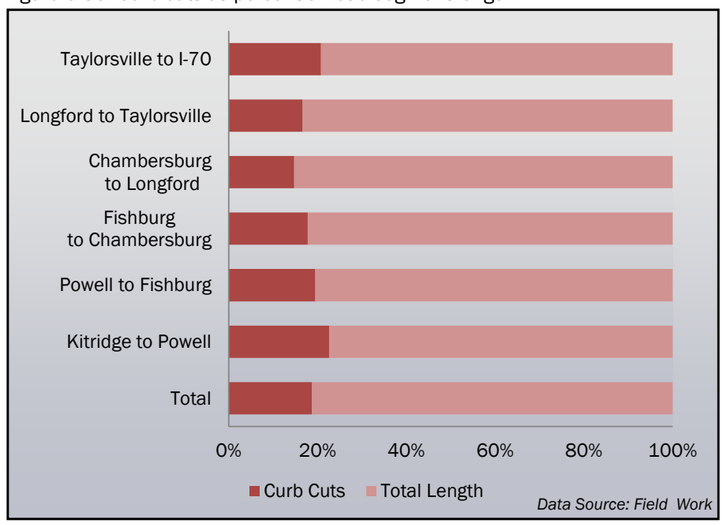


Figure 6.36: Curb Cuts between Kitridge and Fishburg Roads.

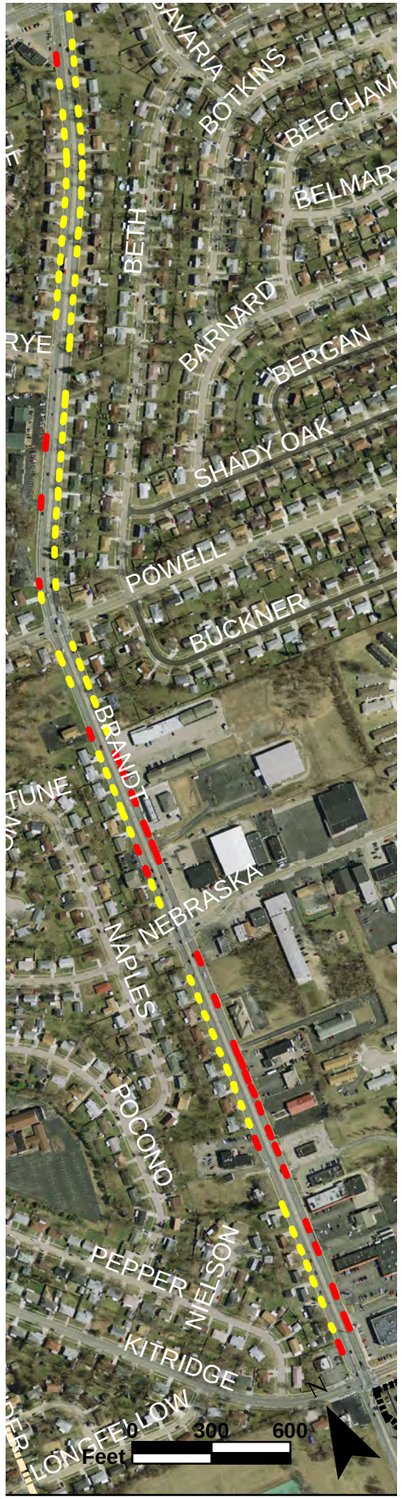


Figure 6.37: Curb Cuts between Fishburg and Longford Roads.

Figure 6.38: Curb Cuts between Longford Road and Study Area boundary.

for 25 percent (0.8 miles) of the total length. There are 6.4 miles of curb line along the 3.2 mile corridor; therefore, the total number of curb cuts on both sides of the street is equal to 23 percent, or about 1.5 miles, of the corridor.

By The Numbers

***1.5** = Curb cuts account for roughly 23 percent (1.5 miles) of curb line on the corridor, from Kitridge Road to I-70.*

There are 177 curb cuts on Brandt pike from Kitridge Road to Taylorsville Road. The highest concentration of curb cuts, mostly residential, is between Kitridge and Fishburg Roads. From Fishburg to Longford Road, curb cuts are almost exclusively commercial. Although less frequent than residential driveways, these curb cuts are wider due to the greater volume of traffic entering and exiting these businesses. From Longford north to Taylorsville Road and the study area boundary, there is a mix of residential and commercial curb cuts, with residential driveways more prevalent on the southern portion of this segment and commercial curb cuts clustered around the Taylorsville Road intersection. Beyond the study area boundary, north to I-70, curb cuts are virtually all commercial.

Some businesses have multiple entry points from Brandt Pike (Figure 6.34). These conditions create unnecessary interruptions in the sidewalk network and increase the potential for conflicts between motorists and pedestrians, and turning and through vehicles on the road.

While frequent entry points to businesses may seem to increase ease of access and convenience for customers, many survey respondents reported that they avoid the Pike during busy hours, because accessing businesses is too difficult. Almost all commercial access points are unsignalized, making left turns in and out of parking lots hazardous.

Figure 6.35 further divides the corridor into six segments, showing the percentage of space that curb cuts occupy out of the total curb length of each segment (both east and west sides of the road). Curb cuts comprise approximately 20 percent of the total length for each segment.

Combined access for multiple properties does exist on Brandt Pike (Figure 6.40) in certain areas, although it is rare. Rather than dispersing turning movements along the corridor, channeling entry and exit for multiple properties into one access point reduces potential conflict with through traffic.

Figure 6.39: Frequent curb cuts create a segmented, hazardous pedestrian environment.

Figure 6.40: An access road connects these homes north of Taylorsville Road to Brandt Pike.

ODOT identifies poorly managed access to and from state highways as "a leading cause of accidents, congestion, decline in operating speed, loss of traffic carrying capacity, and increased traffic delays."[3] Recommendations for improving access management on Brandt Pike are described in Chapters 9 and 10.

3. *Ohio Department of Transportation. (2001). State Highway Access Management Manual.*

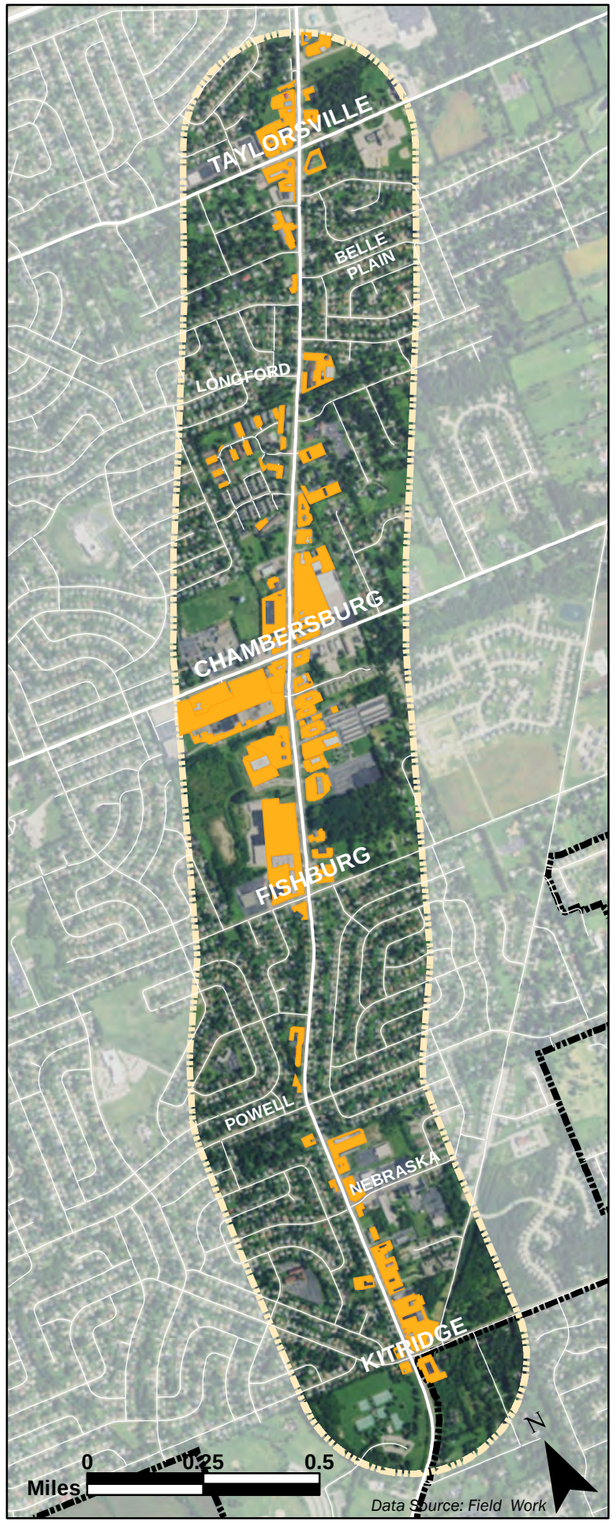


Figure 6.41: Parking Estimates*

Parking
Roads
Study Area
Corporation Boundary

**Single-family residential driveways are not included in the parking inventory. Apartment complex parking lots are included.*

Parking

An informal parking inventory was conducted to estimate parking capacity and occupancy rates along the Pike. All parking lots with access from Brandt Pike in the study area are included in the parking inventory. Although the Huber Center lot fronts primarily on Chambersburg Road, it is counted in the inventory because it can be accessed from Brandt Pike, due to its importance as a primary trip generator along the corridor, and because of its role as the initial redevelopment site in the proposed plan.

By The Numbers

9% = Surface parking accounts for nine percent of the study area.

12,500 = Estimated number of parking spaces along the corridor.

The minimum size for an off-street parking space is eighteen feet in length by ten feet in width (City of Huber Heights Ordinance 90-0-450). There are roughly 86 acres of off-street, surface parking on Brandt Pike between Kitridge Road and I-70 (there are no parking garages on the corridor). When room for aisles and landscaping is added to parking space size, each space is approximately 300 square feet. At this size, existing surface parking along Brandt Pike accommodates an estimated 12,500 spaces.

Surface parking accounts for nine percent of the study area, and is dispersed throughout the corridor. Beginning at the southern boundary, a moderate amount of parking is clustered on the east side of Brandt Pike between Kitridge and Powell Roads. The west side is primarily residential. Private homes and driveways line both sides of the corridor between Powell and Fishburg Roads. Between Fishburg and Chambersburg Roads, parking lots occupy almost all of the frontage on Brandt Pike on the west side of the corridor, and a significant amount of frontage on the east side, although those lots are not as large. The most concentrated amount of surface parking in the study area is clustered around the intersection with Chambersburg Road, in the Huber Center to the southwest, and the Goldmans Shopping Center to the northeast. Based on field observations and satellite imagery, these parking lots experience very little use, relative to their size (a ten percent occupancy rate was observed at the Huber Center lot). The corridor reverts back to mostly residential between Chambersburg and Taylorsville Roads, with minimal off-street parking (apartment complexes on the west side and small businesses on the east side feature some surface parking). Parking lots flank the Taylorsville intersection, primarily on the west side, both north and south of Taylorsville Road.

Figure 6.42: The Huber Center lot is almost six times larger than the Wayne High School football field.

To illustrate the sheer extent of parking along the Pike, Figure 6.42 superimposes the nearby Wayne High School football field on top of the Huber Center parking lot, which is almost six times the size of the field.

Given Brandt Pike's estimated parking occupancy rates, the existing parking in the study area exceeds the demand for commercial parking. While mostly empty parking lots are a sore sight for people traveling along the Pike, the excess space also offers a prime opportunity for redevelopment.

In addition to creating a safe, convenient, and livable public realm on Brandt Pike, changes in the private realm are of equal importance when it comes to improving the corridor as a whole. In the next chapter, a market analysis of housing and businesses in the area examines strengths and weaknesses in the local economy and how it may affect redevelopment efforts.

A large amount of parking exists just outside the study area, at the Sulphur Grove Shopping Center, south of the I-70 interchange. Most of this parking serves the Walmart Super Center on the east side of the corridor. Another large parking lot is located northwest of the interchange, at the Meijer grocery store.

Figure 6.43: Huber Center

Figure 6.44: Marian Shopping Center

Chapter 7: Commercial and Housing Markets

This chapter is divided into two primary sections: a commercial market analysis and a housing market analysis. The commercial market analysis summarizes the existing conditions of the commercial property along the corridor through individual business interviews, stakeholder interviews and quantitative analysis. The market position of Huber Heights and Brandt Pike in comparison to other cities in the greater Dayton area is also examined. The housing market analysis summarizes past, current and future demographic trends within Huber Heights and the larger Housing Market Area. This section also evaluates the current housing supply and its effectiveness in serving the needs of the residents within Huber Heights and the market area.

These analyses draw upon interviews the project team conducted with business owners and other stakeholders. For clarity, these exchanges are described in the first person, from project team members' viewpoints.

Commercial Market

A significant portion of the Brandt Pike corridor is commercial in nature and character. In fact, seventy percent of the space along the corridor is fronted by commercial properties. Commercial properties are defined as any revenue producing property – this includes strip centers, stand-alone retail and restaurant, banks and office space, and small light industrial/flex office and/or warehouse spaces. Much of the "revitalization" of the Brandt Pike corridor will depend upon improvements made to the commercial components – some of those improvements are likely to be physical, while others will be less obvious – like financial incentives and zoning changes.

Seventy percent of the space along the corridor is fronted by commercial properties.

In an effort to understand the current "health" of Brandt Pike as a commercial corridor, we personally visited each commercial entity along the corridor. During the months of July and August 2016, we visited 260 businesses along Brandt Pike. During each visit, we attempted to ask the business' owner or manager a series of semi open-ended questions regarding their experience as a business operating within the Brandt Pike corridor. In our opinion, the interview process is by far the best way to take the pulse of a neighborhood or district, and the interviews we conducted as part of this exercise were no exception. The first part of the commercial property analysis provides a summary of the responses provided to us during our individual visits.

During our visits to the Brandt Pike businesses, we were also collecting data related to the business operations and data related to the physical space a business was occupying. We surveyed each property – making note of their accessibility, overall quality, visibility, lease rate (if applicable and available), and overall character. During this process, we also created a property inventory where we recorded vacancies, lease rates and leasable size of the property.

In addition to the business interviews, we also interviewed twelve primary stakeholders ranging from property owners and managers to tenants. The questions we asked were different from those we asked the business owners and managers. The questions were different because in most cases, their perspective was different or the perspective we were seeking was different. A summary of their responses is provided within this analysis.

The quantitative portion of the market analysis required the corridor to be broken down into separate zones for analysis. Market areas (sometimes called trade areas) were constructed for each zone and data such as consumer expenditure and income data, was analyzed within the context of each market area. This "zonal" approach allows for an independent analysis of what was often similar, nearby, competitive uses.

The following market analysis constitutes a qualitative and quantitative approach to the analysis of the Brandt Pike corridor. We believe this represents the appropriate means of scrutiny given the nature of the study area – a 2.7-mile-long primarily commercial corridor with a wide range of uses and of varying intensity.

Business Survey Summary

How has business changed over the years?

This question is obviously only applicable to businesses that have some degree of a track record. Sometimes the answer to this question is dependent upon national trends (larger businesses and franchises) but in Huber Heights, the trends are usually dependent upon the conditions locally. The answers to this question provide a glimpse

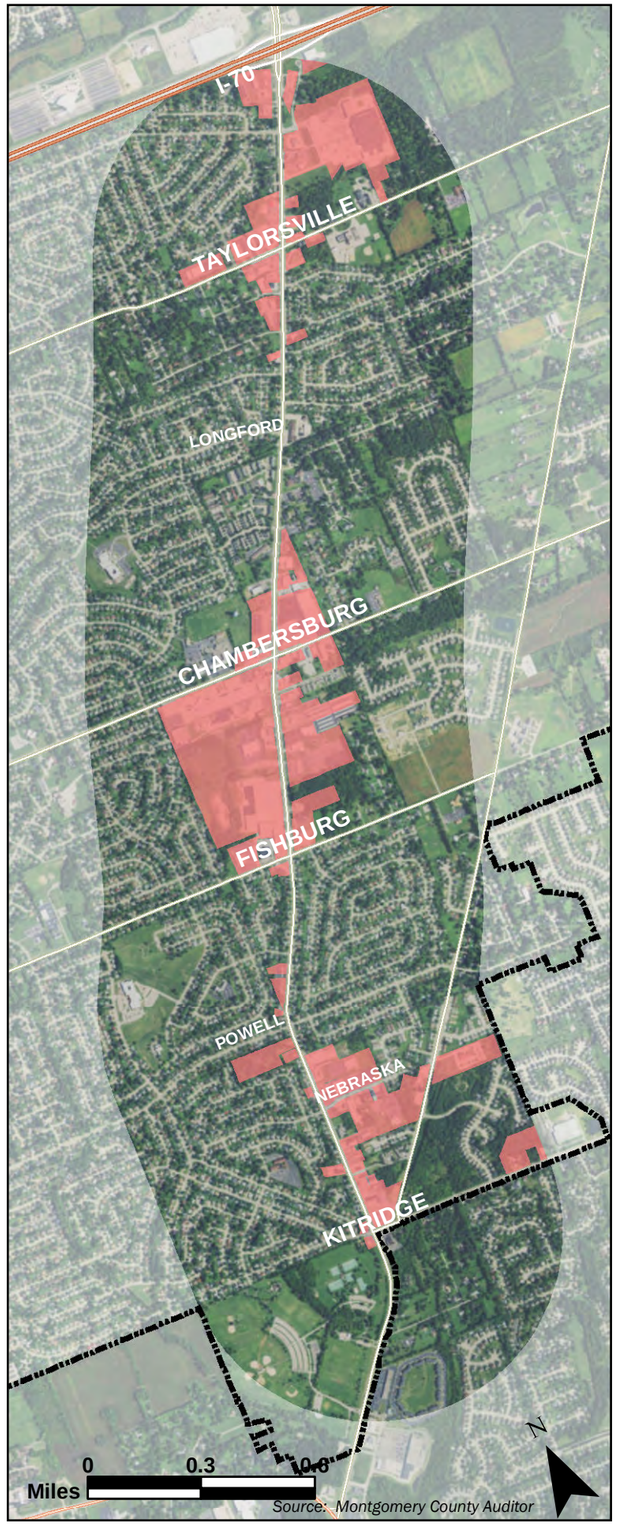


Figure 7.1: Commercial Land Use

Corporation Boundary
Commercial Land Use

of not just the current economic conditions, but a window into the near future.

The most common answers given to this question was "no change" or "hard to tell." This was generally the response given by those that do not have access to the actual numbers; rather, the assessment is based on a series of observations made over a period of time. For example, virtually all the businesses that are auto-centric (auto repair and auto parts sales) reported a steady annual increase in foot traffic and sales, although they could not quantify the increase in sales. Several mentioned that their clientele is increasingly more diverse — an observation that is supported by the changing demographics within the region — and that this is where most of their growth is originating from.

When we spoke with the owners or primary managers themselves, we generally received more direct information. Virtually all the establishments that sell alcohol, either retail sales or from a bar, report a steady increase in sales. Most of the cafes and restaurants report that sales have either been constant or improving over the last several years.

Most of the cafes and restaurants report that sales have either been constant or improving over the last several years.

Historically, we generally find that business owners and managers are more likely to elaborate on this topic when business has not been going well. We identified several businesses that could be at risk in the near-term. Family Video is experiencing the changing consumer preferences affecting the entertainment industry. More people are utilizing services such as Netflix (digital streaming) and Amazon Prime, while relying less and less on renting physical media.

Figure 7.2: Family Video

Figure 7.3: Walgreens

Consumers that continue to rent physical media such as DVD's, increasingly prefer to utilize services such as Redbox and Netflix (mail delivery) to physical stores.

The pharmacies within the Brandt Pike corridor report that business has been declining recently, an interesting trend, considering the increasing share of the market that senior citizens occupy. CVS explicitly stated that they have seen a decline in the number of senior citizens. Walgreens' challenges seem to be tied to the loss of Wright-Patterson Air Force Base (WPAFB) customers due to Walgreens' decision to drop Tri-Care Insurance in 2011. The struggles of these pharmacies are troubling, Because the industry as a whole has been growing steadily for some time, indicating that potential pharmaceutical sales are leaking outside of their immediate trade areas to competitors, online sales and even same store cannibals.

The Goodwill store located near the intersection of Kitridge Road and Brandt Pike within the Lofino's strip center reported a decrease in sales lower since the new Goodwill opened to the north near the Walmart at the I-70 interchange. This store occupies the space with the best visibility in this strip center.

Figure 7.4: CVS

Figure 7.5: Lofino's Plaza

Table 7.1: Vacant Commercial Space

Zone	Total Number of Spaces	Total Vacant Square Footage	Average Rent per SF per Month
Chambersburg	24	140,372	$0.55
Nebraska	14	26,802	$0.70
Taylorsville	9	30,884	$0.91
Total	47	198,058	$0.63

Source: Urban Decision Group

Figure 7.6: Goodwill South

Figure 7.7: Goodwill North

Several of the businesses in the Marian strip center and the Shoppes at Huber Heights located immediately to the south, reported declining sales for a variety of reasons – the most common reason stated was the increasing pressure of online sales. The second most popular explanation for declining sales was attributed to the increasing amount of vacancies in nearby retail bays and the negative perception associated with vacancies. In fact, approximately 20 percent of the vacancies we surveyed along Brandt Pike can be found within the Shoppes at Huber Heights alone.

What do you like about your location?
We asked each business to describe the attributes of their location that they really liked. We also asked

Figure 7.8: Shoppes at Huber Heights

what they did not like about their location. The most common answer given to this question was "inexpensive rent." This response is troubling for several reasons. The price of anything (which is not explicitly or implicitly price controlled) is a function of the supply and the demand for a given product or service. Cheap rent is the result of high supply and low demand, or a combination of both. Therefore, cheap rent inherently implies a market inefficiency — so it is ironic that businesses would categorize cheap rent as a desirable characteristic associated with their location. We will discuss the relationship of supply and demand with respect to rent later in this analysis.

The high traffic volumes and busy intersections along Brandt Pike were frequently cited as a desirable attribute, although many expressed concern with the speed of the traffic — the speed limit is 35 m.p.h. — yet many claim that traffic is usually traveling much faster than that. For those businesses that are not setback too far from the road, being easily visible was cited as a desirable attribute — Brandt Tower Plaza is a good example. If visibility was a problem, a well-place, visible sign compensated for less visible businesses.

The high traffic volumes and busy intersections along Brandt Pike were frequently cited as a desirable attribute...

Table 7.2: Occupied Commercial Space

Zone	Total Number of Spaces	Total Square Footage	Average Monthly Sales	Average Rent per SF per Month
Chambersburg	100	810,839	$100,782	$0.63
Nebraska	48	277,982	$79,457	$0.73
Taylorsville	43	384,827	$337,065	$1.10
Total	191	1,473,648	$113,772	$0.71

Source: Urban Decision Group

Figure 7.9: Marian Center

Many cited the central location within Huber Heights as a favorable attribute. This was a popular response for businesses located within the Huber Center. For some, being located close to a bus stop or close to apartment buildings was a desirable attribute because of the frequency and intensity of associated foot traffic. Brandt Pike is not only centrally located within Huber Heights, it is a heavily traveled thruway for those commuting to and from WPAFB; business owners cited Base personnel as a significant portion of their clientele.

Virtually all businesses that had something positive to say about their location mentioned the importance of having "good neighbors," referring to their retail or office neighbors and/or the residential neighborhoods that surround them.

What do you not like about your location?
By far, the most common response to this question was "poor visibility" — most often this is a function of the degree to which the business or strip center was set back from the road. The deep setbacks are especially problematic when most of the customers arrive via automobile, and oftentimes the traffic on Brandt Pike is exceeding the speed limit. In addition, there are several strip centers that have a perpendicular orientation to Brandt Pike which provides for decent visibility only 50 percent of the time, depending on the direction you are traveling. Poor street lighting and poor strip center parking lot lighting contributes to the problems associated with visibility.
The visibility and intensity of permitted signage — or more appropriately, the lack thereof — is related to this issue. There were several complaints about regulations associated with the placements of signs. Businesses with excessive setbacks are often reliant upon signs located within the view of drivers along a thoroughfare. This presents a problem for both the City and the business. A proliferation of signs can result in clutter and poor aesthetics, which negates the positive impacts of the sign.

Figure 7.10: Huber Center parking lot

Figure 7.11: Gem City parking lot

Figure 7.12: Lofino's Plaza

The second-most common response to this question was related to property maintenance or the lack thereof. Every tenant we spoke to at the Marian Shopping Center agreed this was a major issue. The poor appearance of a strip center contributes to the lack of customer traffic and it also deters potential tenants from occupying vacant space — vacancies were the third most common response given to this question. Vacancies contribute to the negative perception of an area, and invite criminal activity, such as vandalism. Retail bay vacancies are not

Figure 7.13: Temporary signage

Figure 7.14: Poorly maintained storefront

the only problem; vacant residential properties also contribute to the negative perceptions of certain areas.

As is often the case, certain positive attributes for one business are considered negative for others. For example, being located close to a bus stop was considered good for some businesses and bad for others. Similarly, some viewed their proximity to relatively dense concentrations of multifamily housing to be negative — this is largely a function of tenant income and the ability to afford certain goods and services.

Most businesses concede that they are almost entirely auto-dependent, which results in a lack of pedestrian activity. Being auto-dependent is not necessarily a business killer, but it becomes problematic for businesses that benefit from the "spillover" traffic associated with customers (or potential customers) that were originally at their location because they were patronizing another business. Large amounts of vacancies within strip centers result in reduced amounts of spillover traffic.

Large amounts of vacancies within strip centers result in reduced amounts of spillover traffic.

Many of the retail spaces are not flexible with respect to size. A number of businesses stated that they were leasing space that was too large for their needs, but it was the closest they could find within the price range of the current market.

Ingress was not considered a problem but egress was frequently cited as an issue — specifically, the ability to turn left out of a parking lot. This is a function of traffic volume, but it is exacerbated by the large amount of curb cuts found along Brandt Pike (discussed in more detail in Chapter 6).

Finally, many expressed a dislike for skateboarders. This is actually an opportunity for the City. Large amounts of skateboarders is indicative of high demand for places to skateboard. In the absence of parks configured with skateboarding facilities or space that is conducive to skateboarding, skateboarders will seek out the next best thing, which is often strip center sidewalks and parking lots. The City could provide public skating facilities and reduce the risk associated with skateboarding on private, retail-centric property.

Is your business seasonal, cyclical or constant?
Most Brandt Pike businesses described their business as being "steady" or "constant." However, many stated that the holidays and/or summertime are their busiest times of the year. Businesses that thrive in the warmer months can generate spillover traffic that can greatly benefit the businesses around them. Again, this is more likely to occur if the destination is considered walkable and there are little to no vacancies surrounding them.

How is business?
This is an intentionally open-ended question which we ask with the intent of soliciting an honest response along with general comments that may answer questions that we did not ask. The answers provide a glimpse of the near-term prospects for retail and office along the corridor.

Businesses that deal in auto parts or auto repair have historically fared well along Brandt Pike and they continue to hold onto their market share. The overall market for auto parts within the entirety of Huber Heights is oversupplied by almost $3 million. The feedback provided by these businesses is consistent

Figure 7.15: Left turn out of Brandt Tower Plaza

Figure 7.16: Seasonality

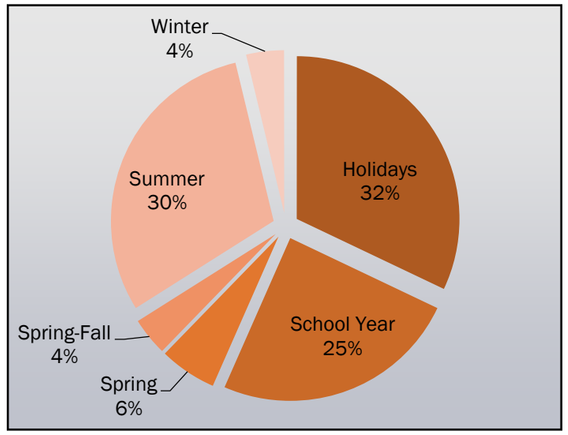


Figure 7.17: O'Reilly Auto Parts

with our interpretation of the data. Businesses such as Autozone, Advance Auto Parts, KOI Auto Parts and O'Reilly's Auto Parts all reported that a sizeable portion of their business is commercial sales. In addition, many of them told us their customers don't necessarily live in Huber Heights, rather, they stop by on their way to and from work. These two factors help explain the high sales volumes. Similarly, virtually every business that specializes in auto repair services reports that business

Figure 7.18: Autozone

Figure 7.19: Advance Auto Parts

has been very good. The data indicate that there is room for growth: demand for auto repair within Huber Heights exceeds the existing supply by a factor of almost 2 to 1. The historic performance of this industry sector combined with current demand greatly exceeding the supply indicates that auto repair is a very healthy segment of the market.

Each of the banks surveyed indicated that business is going well after a slowdown during the recent recession. In fact, several of the banks indicated that they were among the best performing branches within the entire Miami Valley market. Mortgage lending and refinancing has rebounded, attesting to the relative stability of the housing market as well as the economic stability of households within the market. Similarly, businesses that specialize in money management and financial planning are reporting that business is up approximately 20 percent over 2015.

As mentioned before, businesses that sell alcohol — both retail and bars/restaurants — report continuing strong sales. However, the restaurant sector within the entirety of Huber Heights is technically oversupplied by a factor of 2 to 1, mostly because a significant portion of restaurant sales are coming from outside the market — primarily in the fast food category. This trend indicates that these

Figure 7.20: Lee's Chicken

Figure 7.21: KFC

businesses are not entirely reliant on Huber Heights and fluctuations in the local economy. It does pose a potential threat, because disruptions outside the market could have a disproportionate impact on this sector. For example, if significant layoffs were to occur at nearby factories or even WPAFB, the impact would shock the restaurant sector quickly and disproportionately because of the over reliance on commuter traffic.

Even though there are a large number of establishments that sell pizza in Huber Heights, most of the pizza businesses we surveyed indicated that business was good with the exception of those pizza shops that have opened within the last couple of years — an indicator of market saturation. Most of these businesses reported a stronger delivery business when compared to in-store sales. As a related theme, many non-restaurant business owners and managers expressed a need for more dine-in restaurants. Taken together, one can conclude that some portion of pizza delivery sales could easily be converted into more lucrative in-store sales given the right conditions — dining room space, located among complimentary retail, that is walkable and easily visible and accessible.

Figure 7.22: Marco's Pizza

Figure 7.23: Rapid Fired Pizza

Figure 7.24: Deroma's

Virtually all businesses and services in the health care sector report strong and improving demand. This is consistent with national trends within the industry.

The aging population of Huber Heights, and the entire country, are indicators that growth in this sector is more than likely.

Businesses such as Dollar Tree and Dollar General are doing well nationally, as well as within Huber Heights according to store managers, and validated

Figure 7.25: Good Samaritan Health Center

Figure 7.26: Urgent Care

Figure 7.27: Bowling Alley

Figure 7.28: Fixery Jewelers

by data estimates for this sector. Although these stores are considered low-end retail, the growth prospects are strong. In fact, the demand exceeds the overall supply by over $8 million within the entirety of Huber Heights.

There are a couple of entertainment oriented businesses along the corridor that are filling a market need and are subsequently doing quite well. The Orbit Fun Center is reporting that it is busy primarily during the school year, because it operates within a seasonal business model. The local bowling alley, Poelking Lanes, is doing everything it can to diversify in an effort to smooth out the peaks and valleys associated with a seasonal business. Recent expansions and renovations are examples of their commitment to the market. As a result, business is still improving and should continue to do so — primarily because they have little competition within the region and there are significant financial barriers to entry in this segment of the market.

There were several businesses that trade in the market of higher end goods such as jewelry and antiques. These businesses generally reported that business has been slowing down recently. Demand for higher-end goods is more elastic than demand for lower-end goods, which means these businesses are capable of drawing in customers from well beyond the boundaries of a typical market area; these establishments are not as susceptible to the whims of a local economy. Rather, they are more likely to be impacted by the regional economy. They also tend to do better when they are clustered together (which is not the case on Brandt Pike) because they depend on the same customer profile. This market sector should be watched closely, as these businesses play an important role in local retail.

Who are your customers?
This question is asked because we are always interested in the demographic profile of a market's customer base. The profile of the customer base today is likely to be similar in the future; therefore, sometimes we can anticipate trends based on this information.

For the most part, the businesses along Brandt Pike cater to a diverse demographic consisting of men and women, young and old, but there are exceptions to this trend.

For the most part, the businesses along Brandt Pike cater to a diverse demographic consisting of men and women, young and old, but there are exceptions to this trend. Many of the owners and managers we spoke to were quick to recognize that senior citizens comprise a sizeable portion of their client base, disproportionate to their presence in the community at large. These businesses are well-positioned to take advantage of the aging population of Huber Heights and surrounding environs.

The second significant observation — and perhaps the most troubling — is the lack of family-oriented businesses and those that attract young people. The reasons for this market weakness can vary but one explanation is the auto-centric orientation of the entire corridor. It is very difficult, and sometimes dangerous, for pedestrians and bicyclists to navigate the Brandt Pike corridor, as described in Chapter 6. The corridor also lacks linkages to surrounding neighborhoods, which greatly limits the opportunities to capture this segment of the market. Improving the linkages to surrounding neighborhoods and reconfiguring the orientation of the primary retail nodes along the corridor would likely result in capturing a segment of the market that is currently being ignored.

Where do your customers come from?
In most cases, the geography which comprises a business's market area is dependent upon two primary factors: the proximity and number of competitors (substitutes) and the elasticity of demand for the goods and services sold. Further, these two factors are interdependent. Elasticity of demand is the concept that the demand for a set of goods or services is a function of: the scarcity of the good, the price, and the desirability of the good, service and vendor. Elasticity refers to a consumer's willingness to travel to purchase a low-order good such as bread. Is the consumer willing to drive past several establishments that sell bread to save ten cents? If not, the demand for bread is relatively inelastic. Conversely, if a consumer is in the market for a new car, s/he is more likely to travel some distance to save thousands of dollars on the car — this is an example of elastic demand.

The responses from business owners and managers were generally consistent with the principles of elasticity of demand. Not surprisingly, the majority (approximately 90 percent) believed that most of their customers came from within the City of Huber Heights. Although there is an interesting mix of retail along Brandt Pike, most of the goods and services can be classified as low- or mid-order goods and services: food, auto parts, and hair styling are good examples. But many customers are captured as they are traveling through the City, likely during a daily commute. This trend is consistent with the concept of a business or service "trade area." A trade area is the area from which the majority of a business's customers originate — typically the trade area accounts for 75 percent of all customer originations. Again, the size of a trade area is dependent upon the elasticity of demand.

There are several businesses that attract customers from the entire Miami Valley region — for example, the Orbit Fun Center (roller skating rink) and Poelking Lanes (bowling alley), because there are very few competitors for these businesses. Customers that want to bowl or skate will gravitate towards these places because the relative demand elasticity for such activities is inelastic. In other words, a customer may be willing to drive 15 minutes to bowl, but not willing to drive past a bowling alley and travel another 15 minutes to patronize a different bowling alley unless there is a compelling reason.

The businesses that specialize in all things related to automobiles appear to be capturing up to half of their customers from outside of the Brandt Pike/Huber Heights area. These businesses are more reliant upon regional sales than most of the businesses within the corridor.

Low-order goods businesses such as Goodwill, Family Video, and the various dollar stores all report strong sales to customers living within the immediate neighborhood; again, this is consistent with the inelastic demand for such goods.

The basic principles of elasticity of demand are well represented by the businesses and services located along Brandt Pike. No unusual patterns or anomalies have been detected. There is nothing to indicate this area is unique from the perspective of the consumer.

The basic principles of elasticity of demand are well represented by the businesses and services located along Brandt Pike.

What can be improved?
Everyone has opinions as to what can be done to improve the Brandt Pike corridor but we all have a different perspective depending on who we are and what our relationship to the corridor is. The perspective of a business owner is usually going to be different from that of a consumer or a commuter. It is for this reason that we simply asked the business owners and managers, "What can be improved?"

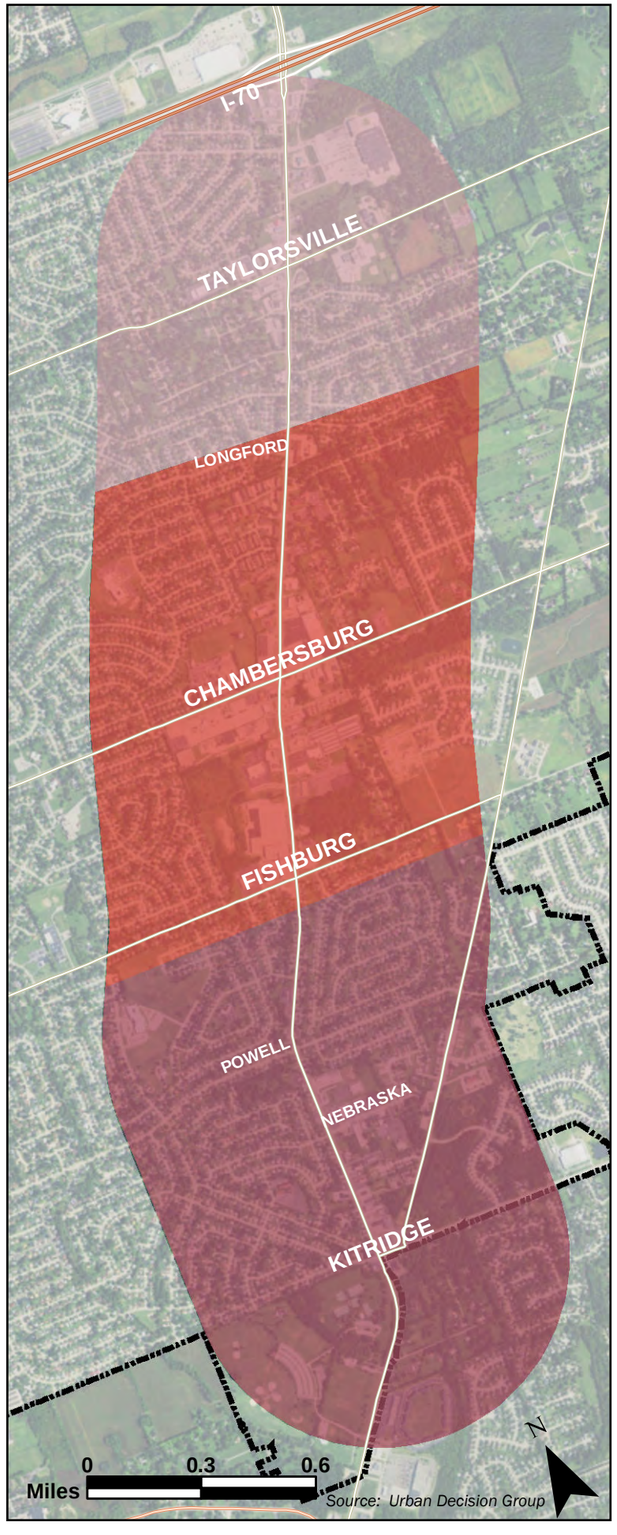


Figure 7.29: Commercial Zones

Corporation Boundary

Commercial Zones

- Taylorsville
- Chambersburg
- Nebraska

The most common response to this question is related to improving the visibility of, or increasing the intensity of signage. In fact, there appears to be a direct relationship between the setback of the business from the road and the desire for better signage. The concern about visibility has merit since many businesses are setback far enough from the road that a well-placed sign is the only visible element that indicates the business exists. However, simply allowing for more signs or larger signs ends up having a negative impact by contributing to indistinguishable visual clutter — a phenomenon in which too many signs with different messages cause the commuter to ignore them because it becomes a dangerous distraction to try and interpret them (especially when traveling faster than 35 miles per hour).

Among the businesses that are leasing space in the many strip centers, the consensus is that the strip centers are in need of a face lift. Problems with deferred maintenance and general upkeep were widely reported. The concern for the strip centers' appearance applies to both the exterior and interior spaces. Trash in the parking lot is a concern at all the strip centers, but this is especially a concern at those locations that have bars as tenants.

The actual Brandt Pike corridor itself was cited as needing improvement. Suggestions for improvement included: slowing down the speed limit, installing a median, better lighting, decorative lighting and landscaping, lane removal and/or on-street parking, and dedicated bike lanes. The difficulty of making left turns while exiting a property was a common theme. The general sentiment regarding the corridor is that its design has contributed to many of the problems the businesses, customers and citizens, are experiencing today.

There is significant concern regarding the number and concentration of vacancies within the strip centers. Lack of flexibility, poor visibility and non-compatible neighboring businesses were the reasons most often cited for the vacant stores. While these may be contributing factors, a basic oversupply of similar, leasable spaces is likely the primary cause.

Quantitative Analysis

Because Brandt Pike is a commercial corridor containing multiple destinations, this analysis examines the retail environment in three distinct zones (Figure 7.29). The first zone is centered around the intersection of Taylorsville Road and Brandt Pike. The second zone originates at the intersection of Chambersburg Road and Brandt Pike. The third zone originates at the intersection of Nebraska Avenue and Brandt Pike. Approximately 70 percent of Brandt Pike's frontage is dedicated to commercial uses such as retail and office. The City itself does not have a clearly defined downtown; as a result, the approximate geometric center of the City — the intersection of

Figure 7.30: Taylorsville Vacancies

Table 7.3: Commercial Businesses by Zone — Taylorsville Zone

Asian Zing	Huber Heights Therapeutic Massage	Shear Attitude
Bob Evans	Kastle's Plumbing	Simply Massage
Bootlegger's Tavern	Key West Tanning	Spirit Halloween Store
Brandt Pike KinderCare	Knickerbocker Pools & Spas	Sulpher Grove Quilt Shop
Classic Pizza	KOI Auto Parts	Taylorsville Family Dental
Daymont-Souders Insurance	LabCorp	Traci's Pet Grooming
Dayton Respiratory Center	Linemann Physical Therapy	Ulbrich's Hometown Bakery
Digestive Specialists & Endosc	Lucky's Auto Sales	United Dairy Farmers
Dr. Agarwal Internal Medicine	Mike's Automotive	Vaporcast
Gabriel Home Care	Olde Glory Cafe	Walmart Supercenter
Gamestop	Petvalu	Waymire Family Dental
Goodwill North	Professional Counseling	Wayne Sporting Goods
Great Clips	R&R TV Services	Wendy's
Highpoint Dynamic	Rent-A-Center	
Huber Heights Animal Hospital	Shaw Lock N Key Service	

Source: Urban Decision Group

Chambersburg Road and Brandt Pike — functions as the de facto center of this historically bedroom community.

Years of inconsistent zoning and development have produced undesirable results both in terms of functionality and aesthetics. Retail businesses are housed primarily in strip centers with deep setbacks and poor visibility. Further, these strip centers are generally falling into disrepair and vacant store fronts are contributing to the visual blight as well as depressing the rent that property owners can charge for these spaces. In recent years, newer retail development north of I-70 has siphoned off potential sales from many of the businesses along the corridor, quickening the decline of the corridor's properties.

Years of inconsistent zoning and development have produced undesirable results both in terms of functionality and aesthetics.

Analysis Zone: Taylorsville Road

There are 52 commercial properties either occupied or vacant within this zone that generate approximately $130 million in annual revenue and representing just under 420,000 square feet of space. The dominant retailer by far is Walmart who is responsible for approximately $76 million in annual revenue. At the time of the survey in the summer of 2016, there were nine vacant store fronts and buildings and two vacant lots representing approximately 34,000 square feet of leasable space, or eight percent of the revenue generating space located within this zone (Figure 7.30).

There were nine vacant store fronts and buildings and two vacant lots representing approximately 34,000 square feet of leasable space, or eight percent of the revenue generating space located within this zone.

Lease rates within this zone range from $0.66 to $1.38 per square foot per month with an average monthly lease rate of $1.10 per square foot. The average monthly revenue generated per square foot is $36; therefore, the vacant space potentially represents lost monthly revenue over $1.2 million, or $14.7 million annually.

Figure 7.31: Taylorsville Commercial Zone Five Minute Drive Time

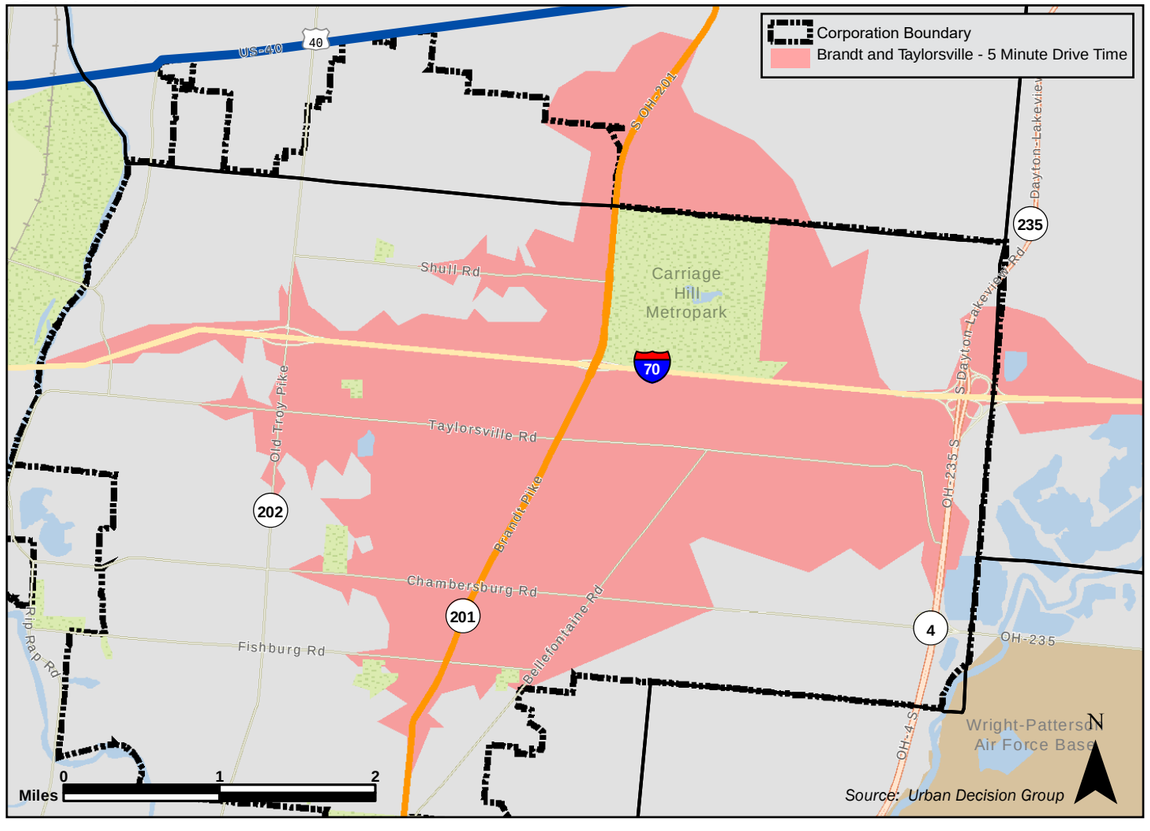


Table 7.4: Taylorsville Five Minute Leakage/Surplus

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$43,348,320	$48,443,163	-$5,094,843	-5.6	14
Automobile Dealers	4411	$35,547,660	$40,958,988	-$5,411,328	-7.1	6
Other Motor Vehicle Dealers	4412	$4,622,580	$0	$4,622,580	100.0	0
Auto Parts, Accessories & Tire Stores	4413	$3,178,080	$7,319,695	-$4,141,615	-39.5	8
Furniture & Home Furnishings Stores	442	$5,012,200	$2,888,160	$2,124,040	26.9	3
Furniture Stores	4421	$3,263,094	$976,913	$2,286,181	53.9	1
Home Furnishings Stores	4422	$1,749,106	$1,911,247	-$162,141	-4.4	2
Electronics & Appliance Stores	443	$10,428,847	$6,262,231	$4,166,616	25.0	6
Bldg Materials, Garden Equip. & Supply Stores	444	$8,828,385	$1,718,507	$7,109,878	67.4	5
Bldg Material & Supplies Dealers	4441	$7,513,990	$1,417,390	$6,096,600	68.3	4
Lawn & Garden Equip & Supply Stores	4442	$1,314,396	$301,117	$1,013,279	62.7	1
Food & Beverage Stores	445	$34,104,213	$110,596,068	-$76,491,855	-52.9	7
Grocery Stores	4451	$31,465,153	$107,179,238	-$75,714,085	-54.6	5
Specialty Food Stores	4452	$1,650,742	$782,718	$868,024	35.7	1
Beer, Wine & Liquor Stores	4453	$988,318	$2,634,112	-$1,645,794	-45.4	2
Health & Personal Care Stores	446,4461	$14,257,015	$3,740,193	$10,516,822	58.4	4
Gasoline Stations	447,4471	$13,419,217	$16,738,264	-$3,319,047	-11.0	6
Clothing & Clothing Accessories Stores	448	$8,213,675	$2,554,918	$5,658,757	52.5	4
Clothing Stores	4481	$5,226,360	$1,270,787	$3,955,573	60.9	2
Shoe Stores	4482	$1,000,059	$911,432	$88,627	4.6	2
Jewelry, Luggage & Leather Goods Stores	4483	$1,987,256	$372,699	$1,614,557	68.4	1
Sporting Goods, Hobby, Book & Music Stores	451	$5,966,466	$11,289,046	-$5,322,580	-30.8	7
Sporting Goods/Hobby/Musical Instr Stores	4511	$4,791,656	$9,943,883	-$5,152,227	-35.0	6
Book, Periodical & Music Stores	4512	$1,174,811	$1,345,164	-$170,353	-6.8	2
General Merchandise Stores	452	$34,270,031	$75,741,390	-$41,471,359	-37.7	6
Department Stores Excluding Leased Depts.	4521	$26,975,071	$67,845,395	-$40,870,324	-43.1	2
Other General Merchandise Stores	4529	$7,294,960	$7,895,996	-$601,036	-4.0	4
Miscellaneous Store Retailers	453	$8,751,348	$6,921,783	$1,829,565	11.7	13
Florists	4531	$371,677	$120,702	$250,975	51.0	1
Office Supplies, Stationery & Gift Stores	4532	$2,025,181	$899,549	$1,125,632	38.5	3
Used Merchandise Stores	4533	$1,286,651	$1,192,127	$94,524	3.8	5
Other Miscellaneous Store Retailers	4539	$5,067,838	$4,709,405	$358,433	3.7	4
Nonstore Retailers	454	$2,883,384	$4,080,200	-$1,196,816	-17.2	3
Food Services & Drinking Places	722	$18,902,604	$33,101,240	-$14,198,636	-27.3	45
Full-Service Restaurants	7221	$9,422,154	$11,804,267	-$2,382,113	-11.2	20
Limited-Service Eating Places	7222	$8,381,887	$20,755,069	-$12,373,182	-42.5	20
Special Food Services	7223	$502,933	$130,155	$372,778	58.9	1
Drinking Places - Alcoholic Beverages	7224	$595,631	$411,749	$183,882	18.3	4

Source: Esri, Infogroup

A supply/demand (sometimes called a leakage/surplus) analysis was completed on the Taylorsville Zone. The trade area utilized for this analysis consisted of a five-minute drive time polygon emanating out from the intersection of Taylorsville Road and Brandt Pike (Figure 7.31). This trade area includes businesses that reside outside of the Brandt Pike corridor because they are deemed competitors.

The laws of elasticity of demand dictate that consumers are willing to travel a certain distance to procure a good or service — that distance is a function of the price and scarcity of the good or service.

Within this isolated trade area, retail trade and food and drink establishments are technically oversupplied. In other words, the demand from those living within this five-minute drive time is less than what is currently being supplied; therefore, the oversupply is being consumed by those living beyond the five-mile trade area — which could be households living in Huber Heights and/or commuters that are passing through, as well as sales that are made online in some cases.

Some of the most oversupplied industry groups include: grocery stores, food and beverage stores (including beer, wine and liquor), department stores, fast food restaurants, auto parts and supply stores, general merchandise stores, and full-service restaurants and bars. Some of the most undersupplied sectors include: jewelry stores, building materials and supply stores, lawn and garden supply stores, health and personal care stores, furniture stores, clothing stores, and florists.

Because this analysis was conducted using a generic five-minute drive time polygon, it does not accurately reflect the demand elasticity of each individual industry group. However, when analyzed in conjunction with other trade areas, the opportunities and risks that each industry group is subject to will become evident.

Analysis Zone: Chambersburg Road

There are 124 commercial properties either occupied or vacant within this zone that are generating approximately $101 million in annual revenue and representing approximately 1 million square feet of space. The highest revenue producing establishments are in the banking, cellular sales, convenience and gas-convenience sectors. At the time of the survey in the summer of 2016, there were 24 vacant store fronts representing approximately 140,000 square feet of leasable space, or 12 percent of the revenue generating space located within this zone (Figure 7.32).

There were 24 vacant store fronts totaling approximately 140,000 square feet of leasable space, or 12 percent of the revenue generating space located within this zone.

Figure 7.32: Chambersburg Vacancies

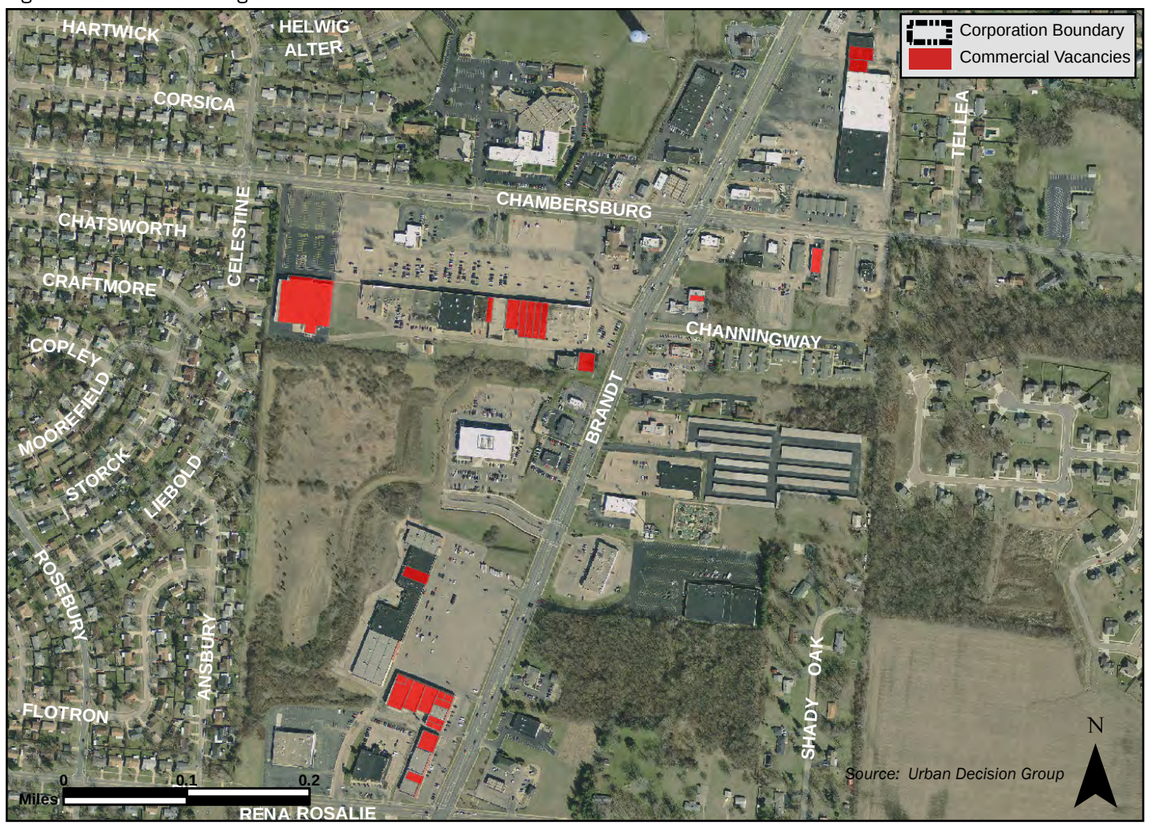


Table 7.5: Commercial Businesses by Zone — Chambersburg Zone

Absolute Small Engine	Gemini Eye Care Center	Nutra Foods
Acceptance Insurance	Girls Gone Styled	Ohio Custom Design Tattoos and Piercings
Advance Auto Parts	Good Samaritan Health Center	O'Reilly Auto Parts
ALDI	Goodyear Gallagher Tire & Auto	Papa John's Pizza
Arby's	Grismer Tire & Auto Service	Papayoon Cleaners & Laundromat
Autozone	H & R Block	Paul Mitchell Hair Salon
Bark of the Town	H2O CAR WASH	Payday Loans
Beacon Lounge	Hazzard's Miniature Golf	Perfections Nail Salon
Bob's Gone Saloon	Heights Café	Platinum Cuts
Bosch Foreign Car Service	Hiz & Herz Salon	Poelking Marian Bowling Center
Bright Now! Dental Center	Hollins Counselor Services	Precision Tune Auto Care
Captain D's Seafood	Hometown Urgent Care	Radioshack
Carl's Barbershop	Hot Head Burritos	Rapid Fired Pizza
Cartridge World	Huber Carpet	Red Wing Shoe Store
Cashland	Huber Heights Atheltic Foundation	River Valley Credit Union
Changing Colors Nail Salon	Huber Heights Cashmax	RJ Hair Designers
Chase Bank	Huber Heights Medical Center	Ronnie Redd - State Farm Insurance
Christy's Catering	Huber Music & Video	Simply Health Chiropractic
Clarkdale	Huber Owner's Association	Sit Stay N Play Dog Park
Coldwell Banker	Iyara Thai Restaurant	Smoker's Outpost
Cricket Wireless	Jackson Hewitt Tax Service	Speedway North
D & D Driving School Inc	Karen L Bays Christian Counseling	Speedway South
D & S Appliane	Key Ads Sign	Storage Inns of America
Dairy Queen	KFC	Subway
Deroma Italian Restaurant	Kwik N Kold	Sugarbell's Kitchen
Dollar General	Laird's Tax Service	Taco Bell
Dollar Tree	Las Piramides Mexican Restaurant	T-Mobile
Domino's Pizza	Lee's Famous Recipe Chicken	T-Nails
Dragon Buffett	Liberty Tax Service	Uhaul Moving & Storage
Eye X Care Optical Center	McDonalds	United Furniture & Mattress
First Financial Bank	Miami Wine & Liquor	Universal Heating & Cooling
Fixery Jewelers	Monro Muffler Tire & Break Service	Vac's and Videos
Fricker's	Northeast Family Practice	Vape Girls

Source: Urban Decision Group

A supply/demand analysis on the Chambersburg Zone, using a five-minute drive time polygon centered on the intersection of Chambersburg and Brandt Pike (Figure 7.33), revealed that the Chambersburg trade area is subject to an overall oversupply — similar to that of the Taylorsville Zone, although smaller in size.

Some of the most oversupplied industry groups include: grocery stores, food and beverage stores (including beer, wine and liquor), auto parts and supply stores, and fast food restaurants. Some of the most undersupplied industry groups include: furniture stores, office supply and gift stores, building materials and supply stores, lawn and garden supply stores, clothing and clothing accessories stores, and jewelry and luxury goods stores.

Figure 7.33: Chambersburg Commercial Zone Five Minute Drive Time

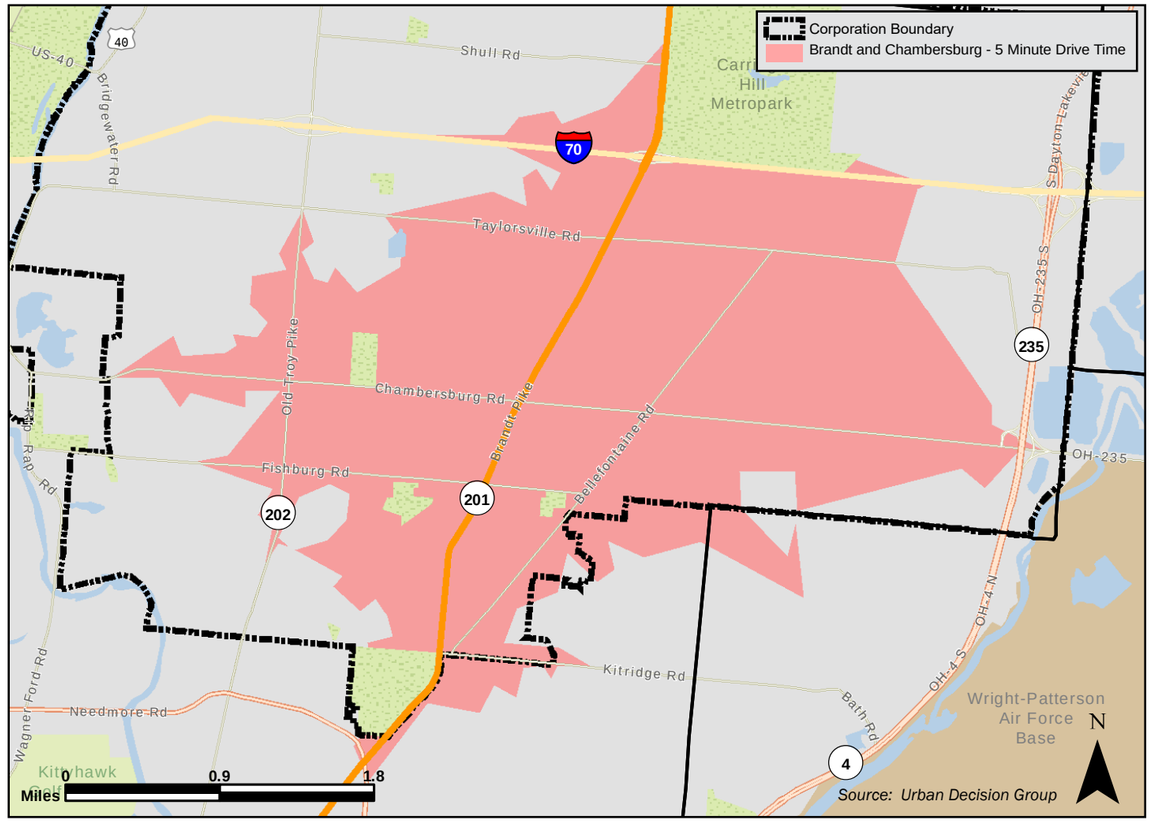


Table 7.6: Chambersburg Five Minute Leakage/Surplus

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$53,517,670	$39,920,458	$13,597,212	14.6	14
Automobile Dealers	4411	$43,876,279	$31,652,399	$12,223,880	16.2	4
Other Motor Vehicle Dealers	4412	$5,748,111	$0	$5,748,111	100.0	0
Auto Parts, Accessories & Tire Stores	4413	$3,893,280	$8,268,059	-$4,374,779	-36.0	10
Furniture & Home Furnishings Stores	442	$6,136,644	$1,414,130	$4,722,514	62.5	1
Furniture Stores	4421	$3,991,112	$0	$3,991,112	100.0	0
Home Furnishings Stores	4422	$2,145,531	$813,834	$1,331,697	45.0	1
Electronics & Appliance Stores	443	$12,752,781	$2,716,135	$10,036,646	64.9	6
Bldg Materials, Garden Equip. & Supply Stores	444	$10,844,758	$1,616,855	$9,227,903	74.1	5
Bldg Material & Supplies Dealers	4441	$9,195,612	$1,279,239	$7,916,373	75.6	4
Lawn & Garden Equip & Supply Stores	4442	$1,649,146	$337,616	$1,311,530	66.0	1
Food & Beverage Stores	445	$41,987,796	$108,255,975	-$66,268,179	-44.1	8
Grocery Stores	4451	$38,745,676	$104,655,901	-$65,910,225	-46.0	4
Specialty Food Stores	4452	$2,032,460	$877,594	$1,154,866	39.7	1
Beer, Wine & Liquor Stores	4453	$1,209,660	$2,722,480	-$1,512,820	-38.5	2
Health & Personal Care Stores	446,4461	$17,613,672	$14,082,205	$3,531,467	11.1	7
Gasoline Stations	447,4471	$16,594,142	$13,267,900	$3,326,242	11.1	6
Clothing & Clothing Accessories Stores	448	$9,993,650	$2,117,879	$7,875,771	65.0	4
Clothing Stores	4481	$6,371,427	$1,012,656	$5,358,771	72.6	1
Shoe Stores	4482	$1,219,820	$395,320	$824,500	51.0	1
Jewelry, Luggage & Leather Goods Stores	4483	$2,402,403	$709,903	$1,692,500	54.4	2
Sporting Goods, Hobby, Book & Music Stores	451	$7,306,151	$3,356,955	$3,949,196	37.0	7
Sporting Goods/Hobby/Musical Instr Stores	4511	$5,866,368	$1,892,523	$3,973,845	51.2	5
Book, Periodical & Music Stores	4512	$1,439,782	$1,464,432	-$24,650	-0.8	2
General Merchandise Stores	452	$42,008,216	$44,762,428	-$2,754,212	-3.2	6
Department Stores Excluding Leased Depts.	4521	$33,025,182	$39,019,290	-$5,994,108	-8.3	2
Other General Merchandise Stores	4529	$8,983,034	$5,743,138	$3,239,896	22.0	4
Miscellaneous Store Retailers	453	$10,806,844	$4,388,793	$6,418,051	42.2	11
Florists	4531	$461,581	$176,842	$284,739	44.6	1
Office Supplies, Stationery & Gift Stores	4532	$2,475,253	$277,723	$2,197,530	79.8	2
Used Merchandise Stores	4533	$1,574,937	$1,443,880	$131,057	4.3	5
Other Miscellaneous Store Retailers	4539	$6,295,073	$2,490,348	$3,804,725	43.3	4
Nonstore Retailers	454	$3,581,168	$3,350,104	$231,064	3.3	4
Electronic Shopping & Mail-Order Houses	4541	$2,007,648	$161,285	$1,846,363	85.1	1
Vending Machine Operators	4542	$372,235	$2,856,445	-$2,484,210	-76.9	1
Direct Selling Establishments	4543	$1,201,285	$332,374	$868,911	56.7	2
Food Services & Drinking Places	722	$23,028,782	$23,484,206	-$455,424	-1.0	43
Full-Service Restaurants	7221	$11,475,713	$8,072,602	$3,403,111	17.4	19
Limited-Service Eating Places	7222	$10,211,355	$14,535,464	-$4,324,109	-17.5	16
Special Food Services	7223	$621,297	$130,155	$491,142	65.4	1
Drinking Places - Alcoholic Beverages	7224	$720,418	$745,985	-$25,567	-1.7	7

Source: Esri, Infogroup

Analysis Zone: Nebraska Avenue

There are 62 commercial properties either occupied or vacant within this zone that are generating approximately $33 million in annual revenue and representing approximately 305,000 square feet of space. The highest revenue producing establishments are in the banking and pharmacy industries. At the time we surveyed the corridor in the summer of 2016, there were 14 vacant store fronts representing approximately 27,000 square feet of leasable space, or just under nine percent of the revenue generating space located within the Nebraska zone (Figure 7.34).

There were 14 vacant store fronts totaling approximately 27,000 square feet of leasable space, or just under nine percent of the revenue generating space located within the Nebraska zone.

Lease rates within this zone range from $0.41 to $1.44 per square foot per month with an average monthly lease rate of $0.72 per square foot. The average monthly revenue generated per square foot is $15; therefore, the vacant space potentially represents lost monthly revenue of just $405,000 – expressed annually this figure is around $4.9 million.

Some of the most oversupplied industry groups include: grocery stores, food and beverage stores (including beer, wine and liquor), auto parts and supply stores, and fast food restaurants. Some of the most undersupplied industry groups include: furniture stores, office supply and gift stores, building materials and supply stores, lawn and garden supply stores, clothing and clothing accessories stores, and jewelry and luxury goods stores.

A supply/demand analysis on the Nebraska Zone, using a five-minute drive time polygon centered on the intersection of Nebraska Ave and Brandt Pike (Figure 7.35), shows that unlike the Taylorsville and Chambersburg zonal analyses, the Nebraska trade area is experiencing an oversupply of retail trade and an undersupply of Food and Drink establishments (restaurants and bars). However, a detailed examination of the individual industry groups reveals much of the trade imbalance can be attributed to a few primary industry groups.

Figure 7.34: Nebraska Vacancies

Grocery stores and Food and Beverage stores account for the overwhelming majority of the oversupply in the retail sector. In fact, 93 percent of this trade area's total oversupply ($488 million) is accounted for in these two industry groups. These industry groups are heavily dependent upon households outside of the five-mile trade area. After these two industry groups, the most oversupplied sectors are: furniture stores, fast food restaurants, auto parts and supply stores, and beer, wine and liquor stores. The most undersupplied stores include: shoe stores, clothing and clothing accessory stores, departments stores, and other general retail stores.

The Nebraska Zone was technically the most out of balance zone we examined. In other words, there are very large gaps at each end of the extremes between what is supplied and what is demanded.

Table 7.7: Commercial Businesses by Zone — Nebraska Zone

American Legion Post 200	Embroidery Creations	Muffler Man
Amvets Post 464	Family Video	New Pizza Shop Opening Soon
Becky & Co Hair Salon	Gisele's Hair Designs	Ohio Home Health Care
Cactus John's Saloon	Goodwill South	Orbit Fun Center
Cape Lounge	Head Ways Stying Salon	PNC Bank
Cassano's Pizza King	Hendrick's Auto Service and Transmission	Sneaky D's Night Club
Castle Roofing	Honey's Beauty Salon	Speed Queen Coin Laundry
Compass Appliance Service	Kammer Racing	Staton Fisher & Conboy LLC
Creative World of Learning School Age Campus	Little Ceaser's Pizza	Storm Cloudz Vapors
Creative World of Learning School Preschool Campus	MAK Dental Group	TG Precious Metals & Diamonds
Cuts Unlimited Hair Styling	Marco's Pizza	Tuite's Hair Salon
CVS Pharmacy	Marketplace Treasures	Valero Food Mart
Dart Train	Memories Party Room & Banquet Hall	Vapor Emporium
Dayton Academy of Gymnastics and Dance	Meng's MartiaL Arts	VFW Dayton Post 3283
Dermatology & Allergy Inc	Metro PCS	Walgreens
Design Group for Hair & Nails	Muffler Brothers	Wash Me Car & Truck Wash

Source: Urban Decision Group

Figure 7.35: Nebraska Commercial Zone Five Minute Drive Time

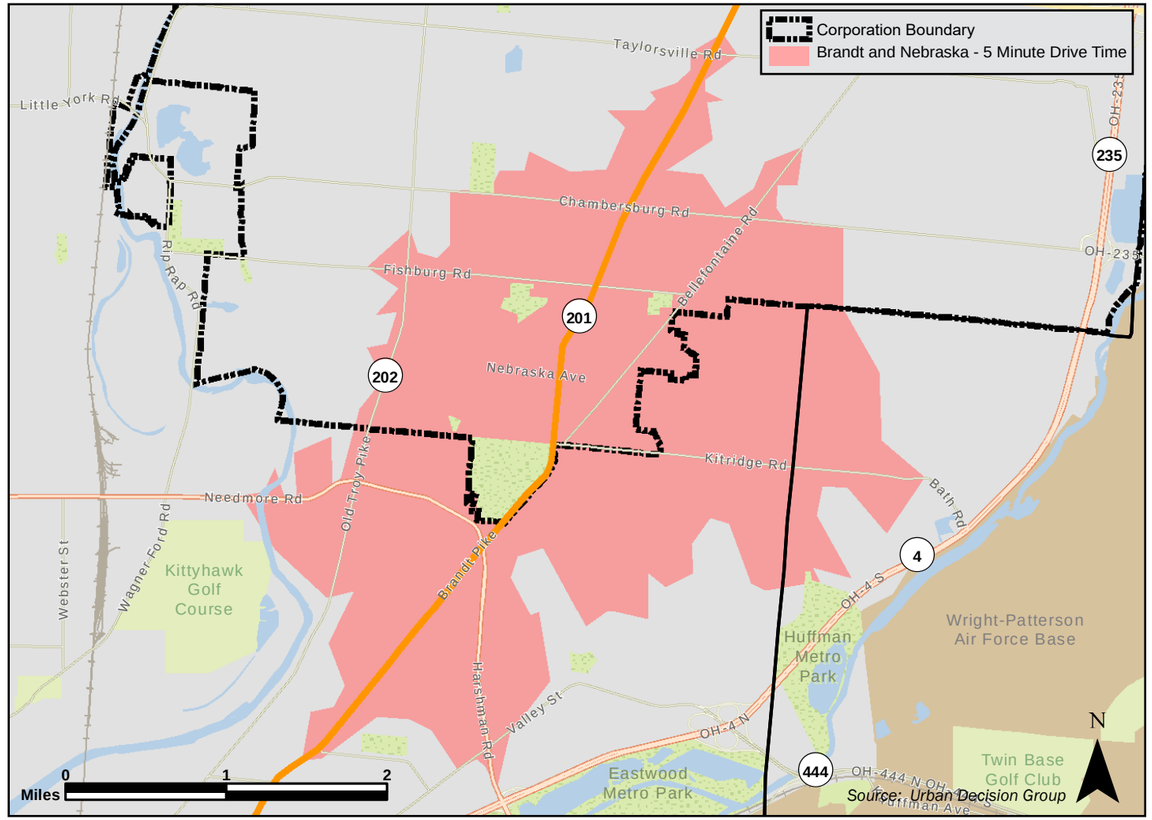


Table 7.8: Nebraska Five Minute Leakage/Surplus

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$62,012,431	$8,801,017	$53,211,414	75.1	11
Automobile Dealers	4411	$50,691,245	$3,061,889	$47,629,356	88.6	2
Other Motor Vehicle Dealers	4412	$6,831,864	$310,994	$6,520,870	91.3	1
Auto Parts, Accessories & Tire Stores	4413	$4,489,322	$5,428,134	-$938,812	-9.5	8
Furniture & Home Furnishings Stores	442	$7,108,763	$20,399,860	-$13,291,097	-48.3	1
Furniture Stores	4421	$4,620,869	$20,027,961	-$15,407,092	-62.5	1
Home Furnishings Stores	4422	$2,487,894	$0	$2,487,894	100.0	0
Electronics & Appliance Stores	443	$14,790,568	$4,755,980	$10,034,588	51.3	8
Bldg Materials, Garden Equip. & Supply Stores	444	$12,717,330	$1,042,365	$11,674,965	84.8	4
Bldg Material & Supplies Dealers	4441	$10,845,750	$719,442	$10,126,308	87.6	3
Lawn & Garden Equip & Supply Stores	4442	$1,871,580	$322,923	$1,548,657	70.6	1
Food & Beverage Stores	445	$48,527,926	$292,630,828	-$244,102,902	-71.6	11
Grocery Stores	4451	$44,775,866	$288,498,521	-$243,722,655	-73.1	7
Specialty Food Stores	4452	$2,348,116	$836,086	$1,512,030	47.5	1
Beer, Wine & Liquor Stores	4453	$1,403,944	$3,296,222	-$1,892,278	-40.3	3
Health & Personal Care Stores	446,4461	$20,187,416	$18,289,826	$1,897,590	4.9	9
Gasoline Stations	447,4471	$19,194,645	$21,824,671	-$2,630,026	-6.4	12
Clothing & Clothing Accessories Stores	448	$11,661,194	$1,301,363	$10,359,831	79.9	3
Clothing Stores	4481	$7,412,815	$0	$7,412,815	100.0	0
Shoe Stores	4482	$1,427,092	$0	$1,427,092	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	$2,821,287	$1,101,077	$1,720,210	43.9	2
Sporting Goods, Hobby, Book & Music Stores	451	$8,668,550	$2,409,012	$6,259,538	56.5	6
Sporting Goods/Hobby/Musical Instr Stores	4511	$6,993,269	$1,023,030	$5,970,239	74.5	4
Book, Periodical & Music Stores	4512	$1,675,282	$1,385,982	$289,300	9.5	2
General Merchandise Stores	452	$48,756,695	$9,085,514	$39,671,181	68.6	8
Department Stores Excluding Leased Depts.	4521	$38,361,305	$1,345,599	$37,015,706	93.2	1
Other General Merchandise Stores	4529	$10,395,390	$7,739,915	$2,655,475	14.6	7
Miscellaneous Store Retailers	453	$12,578,056	$2,934,281	$9,643,775	62.2	7
Florists	4531	$516,318	$74,551	$441,767	74.8	1
Office Supplies, Stationery & Gift Stores	4532	$2,884,832	$0	$2,884,832	100.0	0
Used Merchandise Stores	4533	$1,833,052	$1,220,544	$612,508	20.1	3
Other Miscellaneous Store Retailers	4539	$7,343,853	$1,537,971	$5,805,882	65.4	3
Nonstore Retailers	454	$4,084,823	$376,723	$3,708,100	83.1	2
Electronic Shopping & Mail-Order Houses	4541	$2,318,874	$0	$2,318,874	100.0	0
Vending Machine Operators	4542	$430,583	$0	$430,583	100.0	0
Direct Selling Establishments	4543	$1,335,365	$316,653	$1,018,712	61.7	2
Food Services & Drinking Places	722	$26,775,370	$19,816,334	$6,959,036	14.9	41
Full-Service Restaurants	7221	$13,320,218	$8,199,184	$5,121,034	23.8	20
Limited-Service Eating Places	7222	$11,910,032	$10,967,896	$942,136	4.1	14
Special Food Services	7223	$714,177	$137,514	$576,663	67.7	1
Drinking Places - Alcoholic Beverages	7224	$830,942	$511,740	$319,202	23.8	6
Special Food Services	7223	$621,297	$130,155	$491,142	65.4	1

Source: Esri, Infogroup

Comprehensive Analysis of Industry Sectors in All Zones

We performed a Supply/Demand analysis on the entire Brandt Pike corridor using a five-minute drive time from any point along the corridor as the basis for analysis — known as the aggregate drive time. This analysis examines the performance of all industry groups simultaneously, a useful tool when identifying the prospects of goods and services that have varying elasticities of demand. The analysis also compares each zone's performance against one another and the aggregate. As mentioned earlier, zones intentionally overlap; therefore, summing supply and demand totals for each zone will not equal the aggregate of all the zones.

Grocery Stores and Food and Beverage Stores including Beer, Wine and Liquor Stores, and Specialty Food Stores

The most oversupplied industry sectors are grocery stores and food and beverage stores. Collectively these sectors are oversupplied by over $325 million. This means the businesses that are included in this sector are selling goods that annually amount to more than $480 in revenue but the households that reside within five minutes of the Brandt Pike corridor are estimated to spend only $155 million collectively on goods and services within the grocery and food and beverage store sectors. Further, those households are likely not spending all that money at these businesses located on and around Brandt Pike — an assumption that is built into this analysis.

Goods and services that are sold by grocery stores and food and beverage stores are generally classified as inelastic goods. Inelastic goods are low order goods such as most commonly consumed food and beverages. They are inelastic because the prices for these goods are usually very similar wherever they are sold. Slight variations in price are not compelling enough to the consumer to induce traveling longer distances in an effort to achieve a lower price. Since these are inelastic goods and the oversupply is so significant ($325 million), the majority of the demand likely absorbed by these businesses is coming from two primary sources: commuters and the residents of Huber Heights and northern Dayton. Even though there are very few such stores that are actually on the Brandt Pike corridor, there are enough stores nearby to absorb the majority of the local demand. This means that it would be difficult for a large to mid-sized grocery to enter the Brant Pike corridor market without endangering the market share of the existing businesses. There are no short-term opportunities for businesses within the grocery store sector.

Beverage stores including beer, wine and liquor stores are somewhat different than grocery stores because they are regulated by zoning and permits to the point where demand for these goods becomes more elastic due to scarcity. The market as a whole is slightly undersupplied by approximately $500,000. There is no clear geographical opportunity for a new player in this market, but given the potential scarcity of these goods due to regulation, there is an opportunity for a new retailer in this industry sector.

Specialty food stores constitute businesses that offer products like baked goods and imports. These stores are usually small but they have become increasingly popular in recent years. The entirety of the corridor is undersupplied by approximately $5.4 million, or 87 percent of consumer expenditures. These goods are more elastic than typical grocery items because of their relative scarcity. There are market opportunities for new entrants to this sector, especially from Chambersburg Road and to the south.

There are market opportunities for new entrants to specialty foods sector.

Furniture and Home Furnishing Stores

Furniture represents goods whose demand is generally more elastic because furniture is considered expensive. This means the consumer is likely to travel greater distances when looking for furniture because choices

Figure 7.36: Aldi grocery store

Figure 7.37: United Furniture

Table 7.9: Aggregate Five Minute Leakage/Surplus

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$106,231,181	$36,181,887	$70,049,294	49.2	18
Automobile Dealers	4411	$87,935,857	$24,910,007	$63,025,850	55.9	3
Other Motor Vehicle Dealers	4412	$10,088,933	$438,989	$9,649,944	91.7	1
Auto Parts, Accessories & Tire Stores	4413	$8,206,390	$10,832,891	-$2,626,501	-13.8	14
Furniture & Home Furnishings Stores	442	$12,331,261	$21,395,455	-$9,064,194	-26.9	5
Furniture Stores	4421	$7,747,982	$19,654,918	-$11,906,936	-43.5	3
Home Furnishings Stores	4422	$4,583,279	$1,740,537	$2,842,742	45.0	2
Electronics & Appliance Stores	443	$22,633,884	$13,443,492	$9,190,392	25.5	12
Bldg Materials, Garden Equip. & Supply Stores	444	$30,058,928	$4,201,759	$25,857,169	75.5	7
Bldg Material & Supplies Dealers	4441	$27,185,581	$3,939,736	$23,245,845	74.7	6
Lawn & Garden Equip & Supply Stores	4442	$2,873,347	$262,023	$2,611,324	83.3	1
Food & Beverage Stores	445	$82,315,913	$241,932,746	-$159,616,833	-49.2	13
Grocery Stores	4451	$72,978,084	$238,551,136	-$165,573,052	-53.1	10
Specialty Food Stores	4452	$6,239,706	$788,421	$5,451,285	77.6	1
Beer, Wine & Liquor Stores	4453	$3,098,123	$2,593,189	$504,934	8.9	2
Health & Personal Care Stores	446,4461	$31,274,144	$18,909,181	$12,364,963	24.6	11
Gasoline Stations	447,4471	$32,217,666	$27,748,859	$4,468,807	7.5	15
Clothing & Clothing Accessories Stores	448	$18,914,863	$5,674,299	$13,240,564	53.8	6
Clothing Stores	4481	$12,348,262	$2,156,721	$10,191,541	70.3	3
Shoe Stores	4482	$2,566,170	$345,613	$2,220,557	76.3	1
Jewelry, Luggage & Leather Goods Stores	4483	$4,000,430	$3,171,965	$828,465	11.6	2
Sporting Goods, Hobby, Book & Music Stores	451	$9,499,147	$11,741,709	-$2,242,562	-10.6	11
Sporting Goods/Hobby/Musical Instr Stores	4511	$7,720,024	$11,741,709	-$4,021,685	-20.7	11
Book, Periodical & Music Stores	4512	$1,779,122	$0	$1,779,122	100.0	0
General Merchandise Stores	452	$81,348,770	$90,205,330	-$8,856,560	-5.2	13
Department Stores Excluding Leased Depts.	4521	$59,480,903	$75,814,354	-$16,333,451	-12.1	4
Other General Merchandise Stores	4529	$21,867,867	$14,390,976	$7,476,891	20.6	9
Miscellaneous Store Retailers	453	$22,076,174	$7,477,770	$14,598,404	49.4	14
Florists	4531	$873,621	$259,754	$613,867	54.2	1
Office Supplies, Stationery & Gift Stores	4532	$3,861,741	$954,061	$2,907,680	60.4	4
Used Merchandise Stores	4533	$2,473,185	$1,630,741	$842,444	20.5	3
Other Miscellaneous Store Retailers	4539	$14,867,627	$4,633,214	$10,234,413	52.5	5
Nonstore Retailers	454	$8,455,276	$849,160	$7,606,116	81.7	4
Electronic Shopping & Mail-Order Houses	4541	$4,865,713	$154,894	$4,710,819	93.8	1
Vending Machine Operators	4542	$813,470	$188,080	$625,390	62.4	1
Direct Selling Establishments	4543	$2,776,093	$506,186	$2,269,907	69.2	3
Food Services & Drinking Places	722	$46,716,556	$49,374,381	-$2,657,825	-2.8	68
Special Food Services	7223	$1,345,682	$348,337	$997,345	58.9	2
Drinking Places - Alcoholic Beverages	7224	$1,663,212	$1,009,697	$653,515	24.4	9
Restaurants/Other Eating Places	7225	$43,707,662	$48,016,348	-$4,308,686	-5.0	57

Source: Esri, Infogroup

tend to be limited from one store to the next. Within a five-minute drive of the Brandt Pike corridor, the overall supply of goods and services attributed to furniture and home furnishing stores is technically oversupplied by almost $21 million. The majority of the oversupply was obvious in the Nebraska Avenue zone analysis because the demand is relatively low and there is a single supplier. Moving further north up the corridor, the demand increases and the supply decreases. If overall quality is not an issue, there should not be a significant shift within this industry sector because there is adequate supply, and the demand should be willing to travel to meet the supply; however, furniture resides in an industry sector that is sensitive to issues of quality. In other words, quality is an attribute that consumers are willing to pay for when they consume higher order goods.

Furniture stores are generally larger in size because their inventory is often bulky and simply needs more space. Consumers like to physically shop for furniture because it represents a type of good that the consumer wants to "try out" and visualize how it will fit in their home. These stores do not require direct visibility because they represent goods that consumers are explicitly seeking out — an example of a good with a higher elasticity of demand. The primary furniture store, United Furniture in the Marian Center, is a prime example of a retailer that is matching their goods to a location with substandard visibility.

Demand appears to be stronger at the south end of Brandt Pike, in fact, demand gradually decreases moving north up the corridor. If there were to be a disruption at the Marian Center (a major renovation or closing of entire center), there would be an immediate opportunity for a new retailer to enter the market. At the moment, however, this industry sector appears to be stable and there are not likely to be any short-term opportunities for new businesses within these industry sectors.

Auto Parts, Accessories and Tire Stores

It is difficult to travel the Brandt Pike corridor without noticing the many auto-centric businesses located throughout — especially auto parts and accessories stores. Auto parts and accessories represent "mid-level" goods. These are goods that vary in price but generally exist within a range of affordability for the average car owner. Demand for these goods is not as inelastic as groceries but not as elastic as luxury goods.

Within a five-minute drive of the Brandt Pike corridor, the overall supply of goods and services attributed to auto parts and accessories is oversupplied by a little over $2.5 million. There are 14 businesses contributing to this supply. The supply is highest around the Chambersburg and Brandt area and slightly lower to the north and south, while demand is relatively constant throughout the corridor. The external demand for the oversupply is likely made up by commuters that reside outside of the market area.

Although it would seem that this industry sector is oversaturated, the businesses that exist within this sector are not cannibalizing sales to the point where any particular business is in immediate danger. This industry sector is currently stable and there are no anticipated short-term opportunities for new businesses, or risks for existing businesses.

The auto parts and accessories industry sector is currently stable and there are no anticipated short-term opportunities for new businesses, or risks for existing businesses.

General Merchandise and Department Stores

The department store sector is at a crossroads, not just in the United States, but around the globe. Department stores such as Macys and Dillards are frantically — and futilely — trying to stem their losses by closing waves of stores on what seems like an annual basis. Retail is changing rapidly and department stores are on the decline. Nobody is entirely sure where this industry sector is headed but all signals are pointing towards significant, wholesale changes to the entire industry. Consumers are increasingly buying traditional department store goods online. In response, the retail industry is attempting to remake itself as not just peddlers of goods, but as providers of an "experience." A traditional supply/demand analysis is a good starting point, but it does not tell the whole story.

Retail is changing rapidly and department stores are on the decline.

Figure 7.38: O'Reilly Auto Parts

Figure 7.39: Goodwill

Within a five-minute drive of the Brandt Pike corridor, the overall supply of goods and services related to the department store sector is oversupplied by about $9 million. The oversupply is being absorbed by those just outside the market, including commuters. Walmart is the dominant retailer in this sector.

Demand elasticity can vary with the type of good that a department store is selling. As goods become more expensive and scarce, consumers will be willing to travel greater distances to acquire the good and save on price; in other words, department stores carry both inelastic and elastic goods.

In markets across the country, Walmart has been able to dominate markets — generally at the expense of smaller stores with less variety. It is difficult to compete with Walmart on price, so increasingly stores have focused on providing superior customer service and a more fulfilling overall retail experience. In the Brandt Pike corridor market, the general merchandise sector is oversupplied by such a large amount that this approach is the only viable way to compete; and even then, it will not save every store from closing. A better strategy might be to assemble clusters of complimentary retail that collectively can replicate the product offerings of traditional retail. In theory, this is what a strip center does. However, a strip center is an example of the old approach to retail — one that does not focus on the experience.

The two "dollar" stores and the two Goodwill stores reside in the general merchandise subsector, although they are all dwarfed by the revenue produced by Walmart. Those four stores combined do not even generate 10 percent of the revenue generated by Walmart. The Goodwill store on the southern end of the corridor is also being cannibalized by the newer store at the northern end; therefore, there is a real danger of this store closing in the near future.

The last 10 years have seen "dollar" stores perform exceptionally well, but their product offering is limited as is their market reach. The Brandt Pike market would have difficulty absorbing another "dollar" store without damaging the ones that are already in the market. This market lacks variety and smaller "mom and pop" general merchandise stores — preferably clustered together.

There are opportunities in this sector even though the competitive economic headwinds associated with supply and demand are significant. A successful local revival of the general merchandise sector will require significant physical changes in the leasable storefront offerings along Brandt Pike.

A successful local revival of the general merchandise sector will require significant physical changes in the leasable storefront offerings along Brandt Pike.

Sporting Goods, Hobby, Book and Music Stores

Within a five-minute drive of the Brandt Pike corridor, the overall supply of goods and services within this industry group is oversupplied in the amount of approximately $2.2 million. There is a noticeable difference in this sector when comparing the northern portion of the corridor to the southern portion. In fact, the northern portion is oversupplied by over $5 million while the southern portion is undersupplied by over $6 million.

Goods and services supplied by this sector are not inelastic, like low order goods such as groceries, nor are they elastic like luxury goods; they more closely resemble groceries than they do luxury goods. The differences between the types of goods within this industry group are more clear when two primary subsectors contained are examined: sporting goods, hobby, and musical instrument stores; and book, periodical, and music stores.

The subsector of sporting goods/hobby/musical instrument stores are oversupplied along the entire corridor in the amount of $4 million; however, this oversupply is concentrated to the north — the Taylorsville Zone is oversupplied by over $5 million. The rest of the corridor is undersupplied. The

Chambersburg Zone is undersupplied by almost $4 million and the Nebraska Zone is undersupplied by over $6 million. Again, elasticity of demand for these goods varies directly with the good itself and not the store selling it. Given this variability in elasticity and the fact that there are obvious inefficiencies in the market, there are opportunities for new entrants to this market, especially south of Chambersburg Road.

The other subsector is comprised of book, periodical and music stores. This subsector has been dying since the first books were sold by Amazon online. However, in recent years it has seen a resurgence to some degree. It is difficult to quantify the local impact of online sales in this subsector because the data is not yet available. Existing data indicate that the market is in perfect balance throughout the corridor. There are no explicit recommendations for this sector, other than new entrants to the market would almost assuredly need to be located among a cluster of miscellaneous stores — taking advantage of the spillover traffic.

Existing data indicate that the Sporting Goods, Hobby, Book and Music Stores market is in perfect balance throughout the corridor.

Restaurants (full and limited service), Special Food Services and Drinking Places (bars)
There is no industry sector more talked about by residents we interviewed on the street and spoke to at public meetings, than this sector. The overall sentiment is that the market is vastly oversupplied by pizza places while there are scant few full-service restaurants. In terms of the number of stores, this sector is the largest within the Brandt Pike corridor market with a supply of close to 100 total stores.

Figure 7.40: Wayne's Sporting Goods

This sector, when excluding fast food restaurants, is very much in balance. In fact, the remaining aggregated sector is only oversupplied by just over $2.5 million. The oversupply is likely being absorbed by commuters and those residing just outside the market. That said, there are several subsectors that are very different and therefore deserve to be analyzed independently, especially fast food restaurants.

The restaurant sector, when excluding fast food restaurants, is very much in balance.

Fast food restaurants are oversupplied in this market by an incredible $16 million. In fact, one third of the revenues produced by this industry subsector are provided by those just outside the market — the majority of which are commuters. This subsector could likely absorb or shed a few businesses with very little economic impact on the market. Businesses in this subsector are generally considered to be easily substitutable and therefore demand is quite inelastic. Market opportunities are limited and are very dependent upon access and visibility.

Fast food restaurants are oversupplied in this market by an incredible $16 million.

The market for full service restaurants was a hot topic at public meetings and interviews conducted on the street. The consensus is there is a scarcity of options, and that may be true. Achieving and sustaining success within this sector is extremely difficult. Short term success is often fleeting and sustained success is dependent upon many factors that are out of the control of the business. For example, during periods of economic decline or stagnation, the family budget for full service restaurants is generally the first to go and the last to recover.

Within the Brandt Pike corridor market, demand starts to exceed supply starting in the Chambersburg Zone, and it increases moving further south down the corridor. In fact, this sector is oversupplied in the north by over $2 million while it is undersupplied by over $5 million at the southern end of the corridor. Therefore, there are opportunities within this subsector, but successful entrants to this market will need to be located among other retail within an active environment such as proximity to more dense housing. The volatility of this sector almost demands some degree of risk mitigation in the form of spillover traffic coming from nearby retail. There are very few local "stand alone" mid- to upscale restaurants that are strong enough to be considered a destination unto themselves. A new entrant to this market would almost assuredly require some semblance of a locational advantage.

There are very few local "stand alone" mid- to upscale restaurants that are strong enough to be considered a destination unto themselves.

The demand for drinking places (bars) is strong throughout the corridor which is currently undersupplied by $650,000, almost 40 percent of this sector's total revenues. This means there is over $650,000 leaking outside of the corridor's market. Not only is that poor economically, but it could be quite dangerous — more drinking outside the area often means more drunk drivers on the roads.

There is no particular location along the Brandt Pike corridor that is better suited economically to absorb new entrants to the market. One or two new bars could be easily absorbed anywhere along the corridor.

One or two new bars could be easily absorbed anywhere along the corridor.

Gasoline Stations
The market for gas stations is inelastic. Most reasonable people will not travel out of their way to save a few pennies per gallon. Prices are generally within one or two percentage points of one another when comparing two or more stores. The entirety of this market is currently undersupplied by almost $4.5 million. The markets on the northern and southern entry points are both technically oversupplied, while the central portion of the corridor is undersupplied. The overall unmet demand is likely being absorbed well outside the Brandt Pike corridor when a consumer needs to refuel. In other words, establishing another gasoline station will not go towards meeting unmet demand; rather, it would likely result in the cannibalization of existing store sales.

Establishing another gasoline station will not go towards meeting unmet demand; rather, it would likely result in the cannibalization of existing store sales.

Clothing Stores (including shoe stores and jewelry)
The clothing store industry sector, like the restaurant sector, includes several subsectors that have varying degrees of price elasticity. For example, clothing is semi-inelastic to semi-elastic, depending on the quality and type of clothing — T-shirts are relatively inelastic while a custom-made tailored suit is elastic. Shoes are similar to clothing but increasingly shoe sales are being made online. Jewelry and leather goods are generally more price elastic because of product scarcity. Within the five-minute drive time that comprises the Brandt Pike corridor market, the sector

Figure 7.41: Taco Bell

Figure 7.42: Speedway

Figure 7.43: Fixery Jewelers

as an aggregate is undersupplied by over $13 million. The aggregate undersupply is pervasive throughout the corridor but it is more pronounced in the southern portion where there are only three stores to be found.

The disaggregation of the sector results in three subsectors: clothing stores, shoe stores, and jewelry, luggage and leather goods stores. The clothing store subsector is undersupplied by over $10 million. The degree to which the corridor market area is undersupplied increases moving south. The Taylorsville, Chambersburg, and Nebraska Zones are undersupplied by approximately $4 million, $5 million, and over $7 million, respectively. There are market opportunities for this sector throughout, but the degree to which there are opportunities is somewhat dampened by increasing online sales in this sector. Similar to the opportunities available to department and general merchandise stores, small to mid-sized clothing stores would benefit from spillover traffic from other clustered stores.

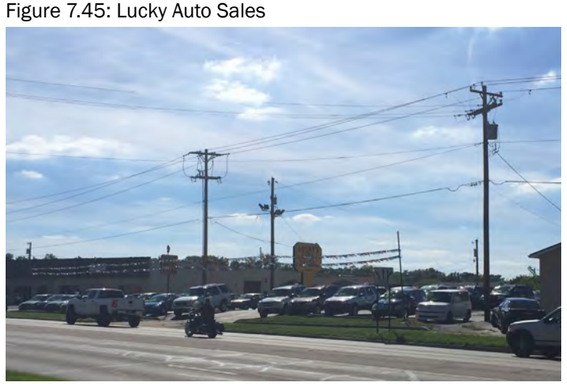
Shoe stores are not nearly as prominent as they were a decade ago. Online sales have accounted for much of the growth within this sector over the last five years. Demand for shoes increases along with discretionary spending. Shoes are more elastic than general clothing items, which is one of the factors restricting new retail outlets from entering the market. However, the entirety of the Brandt Pike corridor market is underserved in this market by over $2 million. The further south, the greater the market opportunity. The Nebraska Zone does not include a single shoe store. There are market opportunities for shoe stores of all types, including specialty stores, throughout the Brandt Pike corridor.

There are market opportunities for shoe stores of all types, including specialty stores, throughout the Brandt Pike corridor.

The final clothing subsector includes jewelry, luggage and luxury goods. This is the most price sensitive sector and therefore the most demand elastic. These goods are almost entirely dependent upon discretionary income. Sales of these goods increase in times of economic prosperity and subsequently, sales decline precipitously during periods of economic uncertainty and recessions. The corridor as an aggregate is undersupplied by almost $1 million. Demand exceeds supply throughout the corridor, and is fairly constant — the undersupply is approximately $1.6 million within each of the zones we analyzed. Even though there are opportunities located throughout the corridor, stores within these sectors tend to do better when situated among other stores that also sell more elastic goods such as high quality or unique clothing and antique stores. Many cities and towns throughout Ohio have localized "districts" where retailers catering to similar tastes end up congregating. There is a limited opportunity for jewelry stores along the corridor, but the likelihood that such a store could be successful increases with the proximity of other stores catering to a similar demographic.

Figure 7.44: Pet Valu

Figure 7.45: Lucky Auto Sales



Miscellaneous Store Retailers

This industry group is a "catch-all" category for all retailers that don't fit nicely into any of the other retail categories. There are several subsectors within this industry group: florists, office supplies, stationary and gift stores, and used merchandise stores. Within the Brandt Pike corridor this includes stores such as the various "vape" stores, Marketplace Treasures (5500 Brandt Pike), and Petvalu (7750 Brandt Pike), to name just a few. These are often privately owned, "mom and pop"-type variety stores. They generally don't generate significant revenues but they are crucial to a healthy retail environment. The key attribute among these stores is "variety" – a wider variety of stores when clustered together is generally stronger than individual stores spread throughout a corridor. The amount and density of these stores are generally good indicators of a healthy retail environment. There is a noticeable lack of these stores throughout the Brandt Pike corridor.

Within a five-minute drive of the Brandt Pike corridor the aggregate of this category is undersupplied by over $14.6 million — that's over 66% of the total amount spent by those living within this trade area.

The subsector group for florists is undersupplied by over $600,000 for the entirety of the corridor. The amount that is undersupplied increases as you move north to south — in fact, the southern portion of the corridor is undersupplied by almost $450,000 — this equates to over 85 percent of all expenditures in this subsector. Virtually any location along the corridor could support a florist but the opportunities increase moving south.

Office supplies, stationary and gift stores are another of this industry group's subsectors. Similar to the previous subsector, the entirety of the corridor is underserved by almost $3 million or over 75 percent of all consumer expenditures in this sector. All locations along the corridor are greatly undersupplied. The Taylorsville Zone is undersupplied by approximately $1.1 million, Chambersburg is undersupplied by almost $2.2 million, and the Nebraska Zone is undersupplied by over $2.8 million. There are market opportunities throughout the corridor for new entrants to this market.

Used merchandise stores (excluding stores like Goodwill) are another of this industry group's subsectors. The entirety of the corridor is undersupplied by over $800,000 or 34 percent of consumer expenditures made in this sector. The only clear immediate market opportunity exists in the southern portion of the corridor, where the sector is underserved by over $600,000. The remainder of the corridor is currently in balance; however, used merchandise stores include antique stores and demand tends to be rather elastic for antiques primarily because of the scarcity of the good. Therefore, there are significant market opportunities located throughout the corridor. Like many of the other subsectors, stores within this category would benefit greatly from spillover traffic from other nearby retailers.

The final subsector within this industry group is simply called "Other miscellaneous store retailers" and it includes everything else that did not fit into the aforementioned categories. A prime example on the Brandt Pike corridor is the "vape" stores. There is a reason it feels like there are a lot of these stores located throughout the corridor: the demand is still incredibly high when compared to the supply. In fact, demand exceeds supply throughout the corridor. The Taylorsville Zone is the most balanced of all the zones while the Chambersburg Zone is undersupplied by approximately $3.8 million (60 percent of consumer expenditures in this sector) and the Nebraska Zone is undersupplied by over $5.8 million or almost 80 percent of consumer expenditures in this sector.

Because this subsector includes such a wide variety of goods and services, it is difficult to determine the degree to which demand is elastic or inelastic — it is entirely dependent upon the good and not the store itself. This subsector is undersupplied to such a degree that we believe there are market opportunities throughout the corridor.

Motor Vehicle and Parts Dealers

This industry group is highly elastic because of the high cost associated with automobile ownership. In addition, these businesses usually require a much larger footprint than a typical retail entity. For this reason, the whole corridor serves as the primary market area. There is no need to examine the localized (zonal) differences in supply and demand. The Brandt Pike corridor area is undersupplied by over $63 million or 72 percent of all consumer expenditures in this sector. There is an opportunity somewhere in Huber Heights for a new automobile dealership; not necessarily on Brandt Pike. The area north of Taylorsville near the Walmart is the only location on the Pike that has the space required and the highway visibility that this type of business desires. Allowing such a business to occupy a prominent space elsewhere along the corridor would result in long-term undesirable consequences that would be counter-productive to the entire long-term strategy of revitalization.

There is an opportunity somewhere in Huber Heights for a new automobile dealership; not necessarily on Brandt Pike.

Electronics and Appliance Stores

This industry sector has become increasingly fragmented in recent years. Online sales and larger big box retailers have a dominant position in the market. Smaller stores like Radio Shack are increasingly rare. Overall, the Brandt Pike corridor market is undersupplied by over $9 million. But these types of goods are fairly elastic because of their cost. The higher the cost, the more elastic the good is. Unmet local demand is likely being met via online sales and regional retailers. Although there is technically an opportunity for new entrants to this market, there is a

lot of risk involved. These stores require more space than your average retail entity, including space for storage. There is a limited opportunity for this sector because of the risks involved.

Health and Personal Care Stores
This industry sector is growing nationwide as the baby boomer generation ages. Demand is partially inelastic because these goods tend to exist in other sectors like grocery stores and other general retailers. This sector is expected to grow for a couple of reasons. First, the region is aging faster than then country as a whole. Second, the health care industry has been moving towards preventative care for at least a decade and that trend is expected to continue. Pharmacies are on the front lines of this shift in focus. Within a five-minute drive of the entirety of the Brandt Pike corridor, this market is undersupplied by over $12 million or 40 percent of consumer expenditures. The degree to which this sector is undersupplied is greatly affected by location. The greatest opportunity for a new entrant exists within the Taylorsville Zone where the amount leaking outside the market area is over $10.5 million. The number of stores that provides these goods increases as you move south down the corridor. We believe there are market opportunities for new entrants to this market, especially from Chambersburg Road and to the north.

Building Materials, Garden Equipment and Supply Stores
The demand for goods within this industry group can be elastic or inelastic, depending on the type of good. These businesses generally require more space than most general retailers which makes it difficult of new entrants to the market. Within the subsector of building materials and supply dealers, the entirety of the Brandt Pike corridor is undersupplied by over $23 million or 85 percent of consumer expenditures. The greatest opportunities technically exist in the southern portion of the corridor where competition is scarce and the market leakage is between $9 and $11 million annually, but space and access limitations will likely prevent market expansion here. For this reason, we believe there is still an opportunity north of Taylorsville Road where land is more readily available.

The industry subsector of lawn and garden equipment and supply dealers' demand can be characterized as being semi-inelastic to semi-elastic – it depends on the type of good. Weed killer is cheap and easy to find and is therefore fairly inelastic. A riding lawn mower can be expensive and not as easy to find and is therefore an elastic good. Over the last 20 years the trend has been towards a consolidation around larger big box retailers although this has cooled off somewhat of late. The area comprised of a five-minute drive from the Brandt Pike corridor is undersupplied by over $2.6 million or 91 percent of consumer expenditures. There is no identifiable locational advantage currently present along the corridor. The opportunities for expansion into this market exist uniformly throughout the corridor but space and access requirements will dictate the ultimate location should probably be located north of Taylorsville Road.

Figure 7.46: D&S Appliances

Figure 7.47: CVS

Figure 7.48: Absolute Small Engine

Regional Comparisons
To fully understand the economic position of Huber Heights and Brandt Pike, an analysis of the general characteristics of the area within a five-minute drive of Brandt Pike was used to make several regional comparisons. The total population and total households within a five-minute drive of Brandt Pike are estimated to be 36,660 people and 14,080 households. For comparison purposes, the City of Huber Heights is estimated to have a population of 38,771 and 15,153 total households. These numbers are extremely similar. Brandt Pike is geographically located at the center of Huber Heights. When comparing the population and household estimates within a five-minute drive from the corridor to that of Huber Heights as a whole, Brandt Pike emerges as a demographically central location as well.

When comparing the population and household estimates within a five-minute drive from the corridor to that of Huber Heights as a whole, Brandt Pike emerges as a demographically central location.

The following sections are included to provide a regional context with which to compare to the area that comprises a five-minute drive from the Brandt Pike corridor.

Demographics
Eight demographic variables were used to provide insight into the socioeconomic state of their respective areas. Population Density is a general measure of efficiency. Higher densities are typically more efficient in terms of infrastructure and walkability; two categories in which Brandt Pike is deficient. The Renter Share of Housing is also a method by which efficiency can be measured. Too much or too little can have a negative impact on all markets. Median Household Income is a standard measure of household stability. Per Capita Income is a more detailed measure of household stability. Median Disposable Income is income that remains after the deduction of taxes and mandatory taxes, and can be spent on anything, including housing and transportation. Median Net Worth is a measure of overall wealth as opposed to median income which is a measure of annual earnings. The Median Age indicates how old a community is. Communities with very low or very high median ages face different problems. Median Home Value is another wealth metric. A home's equity is built into the net worth metric.

As mentioned at the beginning of this section, the area comprised of a five-minute drive from the Brandt Pike corridor is remarkably like the entire City of Huber Heights across all the metrics. The following table simply compares the Brandt Pike corridor to Huber Heights, Beavercreek, Dayton, Fairborn and Vandalia.

Employee to Residential Population Ratios
Within the aggregate drive time polygon, there were a total of 977 businesses accounting for an estimated 11,776 total employees — equating to an employee to residential population ratio of 0.32 to 1. The relatively small number of businesses juxtaposed against the healthy total population is indicative of the classic "bedroom community" profile. Traditionally, bedroom communities are places where people live, when they are not working, shopping or playing.

The cities of Beavercreek, Fairborn, Vandalia, and Dayton were used for comparison purposes. Beavercreek has a total estimated population of approximately 47,000. Within Beavercreek, there are over 2,000 businesses that employ around 26,500 people — equating to an employee to residential population ratio of 0.57 to 1; therefore, although Beavercreek has about 10,000 more people than Huber Heights, it employs almost two and a half more

Table 7.10: Demographic Metrics, Regional Comparison

Metric	Brandt Pike 5 Minute Drive	Huber Heights (all)	Beavercreek	Dayton	Fairborn	Vandalia
Population Density	1,769	1,741	1,767	2,524	2,478	1,223
Renter Share of Housing	30.8%	30.1%	29.2%	53.6%	51.7%	39.2%
Median Household Income	$54,068	$53,632	$77,399	$28,520	$42,196	$52,477
Per Capita Income	$25,615	$26,188	$39,681	$17,572	$24,807	$29,247
Median Disposable Income	$44,542	$44,098	$59,570	$25,449	$36,053	$42,962
Median Net Worth	$113,162	$116,173	$228,308	$13,931	$22,233	$78,609
Median Age	37.2	38.5	41.4	35.3	33.9	41.8
Median Home Value	$110,521	$111,559	$192,484	$74,562	$113,986	$140,082

Source: Urban Decision Group

people than are employed within a five-minute drive of the Brandt Pike area. Fairborn has a population that is closer to the population found within a five-minute drive of Brandt Pike. In Fairborn, the population is approximately 32,500 and there are 922 businesses that employ almost 17,000 people — equating to an employee to residential population ratio of 0.52 to 1. It is worth noting, the Fairborn data is exclusive of Wright-Patterson Air Force Base, which is considered its own Census Designated Place. Both Beavercreek and Fairborn have higher employee to resident ratios than Brandt Pike, meaning they are in a better position than Huber Heights to have sustained commercial economic activity.

Both Beavercreek and Fairborn have higher employee to resident ratios than Brandt Pike, meaning they are in a better position than Huber Heights to have sustained commercial economic activity.

Vandalia is about half the size geographically of Huber Heights and therefore has a significantly smaller population of just over 15,000 people. However, within Vandalia there are almost 800 businesses that employ approximately 13,500 people — equating to an employee to residential population ratio of 0.89 to 1. The City of Dayton is much larger than any of its surrounding suburbs in terms of both geography and demographics. There are over 140,000 people living in the City of Dayton proper along with almost 125,000 total employees — equating to an employee to residential population ratio of 0.89 to 1. Although Vandalia and Dayton are cities of vastly different sizes, they are both examples of places with a strong live/work balance. This balance provides for a more stable economic atmosphere because there are much larger numbers contributing to the office and retail markets during regular work hours. In other words, the sheer volume of additional people participating in these markets can offset factors such as lower overall incomes and limited transportation options.

Leasable Space

In the fall of 2016, the project team researched the regional market for available commercial leasable space for the purpose of comparison. Property types included strip center retail, office, standalone commercial, and other leasable spaces. The cities surveyed include: Beavercreek, Dayton, Fairborn, Kettering and all available properties in Huber Heights. Table 7.11 provides a summarization of the findings.

The most dominant type of commercial property along Brandt Pike is leasable retail units within strip centers. On the Brandt Pike corridor, the average monthly price per square foot is $0.70. This number reflects both occupied and vacant properties. This is slightly higher than the average monthly rate available for vacant space within the entirely of Huber Heights: $0.65 per square foot. These average monthly rates trail most of the rates for comparable spaces currently available within the region.

Table 7.11: Regional Commercial Properties

City	Type	Average Monthly Rate
Huber Heights	Strip Retail	$0.65
	Restaurant	$0.75
	Large (>10k sq ft)	$0.94
	Office	$1.00
Beavercreek	Strip Retail	$1.00
	Restaurant	$1.76
	Large (>10k sq ft)	$1.68
	Office	$1.33
Dayton	Strip Retail	$0.77
	Restaurant	$0.67
	Office	$0.81
Kettering	Strip Retail	$1.46
	Office	$1.00
Vandalia	Strip Retail	$0.67
	Office	$1.00

Source: Urban Decision Group

The market for office space in Huber Heights is comparable to other markets throughout the region. Within Huber Heights, the average monthly rate per square foot was $1.00 which was also the rate of currently vacant space in Kettering and Vandalia. The rate is $1.33 in Beavercreek and $0.81 in Dayton.

Corridor Summary

In addition to the quantitative supply/demand analysis of the retail markets and the business interviews conducted up and down the corridor, a visual qualitative summary of the corridor's existing conditions also informed this analysis. This effort reinforced observations and anecdotal information that collected as part of the interview process. The following section summarizes the primary qualitative and quantitative criteria by which the various commercial entities were judged.

Strip Centers

The dominant retail type found throughout the corridor is strip center retail. This is not surprising, considering Huber Heights' history. With no historic town center, commercial growth in Huber Heights has been incremental and disjointed. Table 7.12 lists the strip centers found along the Brandt Pike corridor.

With no historic town center, commercial growth in Huber Heights has been incremental and disjointed.

There is a strip center situated just off Brandt Pike at 6443-6455 Chambersburg Road. This 10,000 square feet building was constructed in 1968 and shows its age — the entire exterior of the building needs updating. Situated at the intersection of Chambersburg Road and Brandt Pike, this strip center is well positioned at a prime location in Huber Heights.

Figure 7.49: 6443-6455 Chambersburg Road

There are six retail units that generate an estimated $17.93 of monthly revenue per square foot. All retail units are all currently occupied. Leasing data for the units were unavailable. This center has great visibility and easy access, with a mid-sized parking lot in front of the building.

Brandt Tower Plaza is located in the northwest quadrant of the Brandt Pike and Chambersburg Road intersection. This building was also constructed in 1968. The exterior of the building is in decent shape. There are 11 retail units that all have ceiling to floor glass walls looking out at the parking lot. The building has approximately 28,000 square feet of leasable space with an average monthly rent of $0.98.

Table 7.12: Strip Shopping Centers Along Brandt Pike Corridor

Shopping Center	Total Number of Spaces	Total Square Footage	Avg Rent per SF per Month	Avg Sales per SF per Month
6443-6465 Chambersburg Rd.	6	10,000	N/A	$17.93
Brandt Tower Plaza	9	28,050	$0.98	$26.51
Cassano's Shopping Center	7	10,300	$0.50	$10.34
Gem City Shopping Center	6	35,000	$0.88	N/A
Huber Center	26	124,134	$0.58	$8.35
Huber Heights Plaza	5	16,000	$1.00	N/A
Lofino's Shopping Center	7	16,300	$0.67	$13.68
Marian Center	11	84,796	$0.42	$17.17
Sulpher Grove Shopping Center	7	20,900	N/A	$24.99
The Shoppes of Huber Heights	18	30,435	$0.58	$59.71
Wayne Plaza	8	17,700	$0.68	$8.35
Total	110	393,615	$0.70	$20.78

Source: Urban Decision Group

Figure 7.50: Brandt Tower

The retail units generate an estimated $28.51 per square foot. The center is set back over 150 feet from Brandt Pike and the parking lot is oversized for the space. These two factors combined contribute to its poor visibility. There are two points of entry which makes for easy access. There are currently no vacancies.

There is a small strip center referred to as the "Cassano's Shopping Center" located at 5118 Brandt Pike. It is named as such because it houses the Cassano's Pizza King restaurant. This shopping center houses seven retail units that account for over 10,000 square feet of leasable space. The retail units generate an estimated $10.34 per square foot per month. There are currently two vacant units, equating to a vacancy rate of 28.6 percent. The building was built in 1953 and it consists of an all brick exterior topped by a metal awning that extends past the roofline. It is in average condition but the awning dates the building. The parking lot is adequately sized for the building but it is in need of resurfacing. There is one entry point off Brandt Pike. The primary issue with this building is its orientation. The building lies perpendicular to Brandt, with the store fronts facing south. The building's orientation results in very poor visibility, especially when traveling north to south. This greatly reduces the value of the space and it is reflected in the rent. The average monthly price per square foot is just $0.50.

The Gem City Shopping Center is located at 5476 Brandt Pike. It consists of two single-story buildings oriented perpendicularly to Brandt Pike. This orientation results in extremely poor visibility. The buildings were constructed in 1965 and need repair. The buildings more closely resemble an old roadside motel than retail/office space.

The parking lot has a single entry point, is oversized for the space, and requires resurfacing. The buildings face each other and they are both similarly sized. There are six units that could be used for retail or office totaling 35,000 square feet of leasable space. The average monthly rent

Figure 7.51: Gem City

is $0.88 per square foot which is surprisingly high, which may explain why there are three vacant units. In addition, the units are very large and inflexible which further restricts their use.

The Huber Center is in the southwest quadrant of the Brandt Pike and Chambersburg Road intersection. Built in 1961, this center represents the largest shopping center along the corridor. The center has 26 retail/office units that comprise 122,880 of leasable space. There are currently eight vacancies which equates to a vacancy rate of 31 percent. The average monthly rent per square foot is $0.58 which are currently generating an estimated $8.35 of revenue per square foot. The building houses some government uses, contributing to the depressed revenue figures. The building fronts on Chambersburg Road and is set back 425 feet from the road. The parking lot needs repair and is exceptionally large for the space.

The deep setback results in reduced visibility. There are four developed outlots in the parking lot that are set back 80 to 150 feet from Chambersburg. There are three access points but circulation within the lot can be confusing and sometimes dangerous. The exterior of the building is average to poor and needs a face lift. The Huber Heights branch of the Dayton Public Library provides a much-needed anchor. Despite its deficiencies, this center is structurally sound and its owner has shown a willingness to adapt space to suit the needs of tenants.

Despite its deficiencies, this center is structurally sound and its owner has shown a willingness to adapt space to suit the needs of tenants.

The Huber Center is in a prime location despite its deep setback. The large parking lot represents a tremendous opportunity for redevelopment. There is undeveloped

Figure 7. 52: Huber Center

land south of the building that could be integrated into any future improvements and site upgrades.

The Lofino's Plaza Shopping Center is located just south of the Cassano's Shopping Center at 5082 Brandt Pike. It is nearly identical to the Cassano's Shopping Center except this building is "L" shaped. The shape of the building provides for direct visibility to the Goodwill Store while the rest of the building suffers from the same orientation-induced visibility issues as does the Cassano's building. The building also exhibits the same exterior features as its companion to the north. There are two entry points — one on Brandt Pike and another on Bellefontaine Road. The parking lot is oversized for the space and needs resurfacing. Once home to Lofino's grocery, this center was built in 1960 and is the oldest strip center in Huber Heights. There are seven units that provide 16,300 of leasable space with an average monthly rent of $0.67. The units are currently generating an estimated $13.68 of monthly revenue per square foot. Four of the seven units are vacant, equating to a vacancy rate of 57 percent. Further, sales are down at the Goodwill anchor ever since a newer Goodwill to the north has opened.

The Marian Center located at 6157 Brandt Pike was built in 1960. It is immediately south of the Good Samaritan Health Center medical office building and due west of the Poelking Bowling Center. The Marian Center is set back 435 feet from Brandt Pike and is fronted by a large parking lot that is three times larger than necessary. There are two points of entry to the center. The center suffers from very poor visibility.

Figure 7.53: Marian Center

The Marian Center is set back 435 feet from Brandt Pike and is fronted by a large parking lot that is three times larger than necessary.

The building is in poor to very poor shape inside and out. The facade is in disrepair and is inconsistent from unit to unit. There are 11 retail units of varying sizes that provide for a total of 85,000 square feet of leasable area. At the time of the survey there was only one vacancy which equates to a vacancy rate of 9.1 percent. The average monthly rent per square foot is $0.42. The average revenue generated per square foot is $17.17. The center itself is in a great location. The large parking lot presents an opportunity for redevelopment.

The Sulphur Grove Shopping Center is a small strip center situated just to the north of Walmart. Constructed in 2004, it represents the newest strip center on Brandt Pike. There are two points of entry that provide access to both Walmart and the strip center. The parking lot is oversized and was built to accommodate the Walmart. The center suffers from poor visibility, but the effect on customer traffic is somewhat blunted because of its proximity to Walmart and the resulting spillover traffic. There are seven retail units that are all currently occupied. The seven units provide for a total of 20,900 leasable square feet. We were unable to procure leasing rates. The average monthly revenue generated per square foot is estimated to be $24.99. The success of the center is almost entirely dependent upon the success of Walmart.

Figure 7.54: Shoppes of Huber Heights

The Shoppes of Huber Heights is located at 6133 Brandt Pike at the northwest quadrant of the intersection of Brandt Pike and Fishburg Road. Constructed in 1985, the building's exterior is in good shape and stands in stark contrast to its neighbor the Marian Center. There are three points of entry that provide access to an appropriately sized parking lot.

The building is set back 100 feet from Brandt Pike and has good visibility. There are 18 retail units that provide 30,435 square feet of leasable space. The average monthly rent is just $0.58 per square foot. The average estimated sales generated per square foot is $59.71. There are currently nine vacancies which equates to a vacancy rate of 56 percent. Considering the center's great location, good visibility, and convenient access, the high vacancy rate is troubling.

Considering the Shoppes of Huber Heights great location, good visibility, and convenient access, the high vacancy rate is troubling.

Huber Heights Plaza is the small strip center in front of Poelking Lanes. Most people are unaware of its whereabouts because there is no sign indicating its name. The building has one primary access point but there is a second one that is accessible at the rear of the building via the Poelking Lanes parking lot.

The parking lot is appropriately sized and is in good condition. The building was constructed in 1991 and is in good shape. There are five retail units that provide for 16,000 square feet of leasable space. The average monthly rent per square foot is $1.00, the highest of all the strip centers surveyed. The building is set back 190 feet from Brandt Pike and this does affect the visibility. Placing the building up front and providing parking in the rear would have greatly increased the value of this property.

Figure 7.55: Huber Heights Plaza

The average monthly rent per square foot at Huber Heights Plaza is $1.00, the highest of all the strip centers surveyed.

Wayne Plaza is located just off Brandt Pike at 7101 Taylorsville Road. The building was constructed in 1975. There are two points of entry that provide access to an adequately sized parking lot. The structure is brick with a metal awning that extends past the roofline. The exterior is in good shape and most units have large glass windows fronting the parking lot. Unfortunately, almost every business has painted or papered over their windows. There are eight retail units that provide for 17,700 of leasable space. At the time the property was surveyed there was a single vacancy. The average monthly rent per square foot is $0.68. The average estimated monthly sales per square foot is $8.35.

Strip Center Summary

The aforementioned strip centers account for a total of 110 units that provide almost 400,000 square feet of leasable space. The average monthly rent is $0.70 per square foot. The average sales revenue generated per month is $20.78. Collectively, there are 28 vacancies — equating to a vacancy rate of over 25 percent — which is dangerously high. There are likely a number of factors contributing to this rate. First, the market for leasable retail space is oversupplied when compared to the current demand for certain types of space. The overwhelming majority of these units are of similar quality and size. Using industry terminology, there is an overabundance of Class "C" space and a lack of Class "A."

The strip center vacancy rate on Brandt Pike is over 25 percent — which is dangerously high.

Like virtually all the businesses situated along Brandt Pike, the strip centers tend to have poor visibility as a result of either improper orientation of exceedingly deep setbacks. Those deep setbacks are facilitating the oversized parking that accompanies the centers. However, these large parking lots could be conceived as a redevelopment opportunity.

Various business owners within the strip centers complained of visibility issues due to those deep setbacks and signage regulations enforced by the city. Many business owners want to mitigate the poor visibility with increased signage.

Office Spaces

There are several small complexes and converted homes that serve as functional office space along the Brandt Pike corridor. There are no large, publicly available office complexes anywhere along the corridor. In several cases, office uses have occupied retail units within shopping strip centers. The various types of uses currently occupying spaces used for offices include:

- All Other Personal Services
- Commercial Banking
- Home Health Care Services
- Insurance Agencies and Brokerages
- Offices of Chiropractors
- Offices of Dentists
- Offices of Lawyers
- Offices of Mental Health Practitioners (except Physicians)
- Offices of Optometrists
- Offices of Physicians (except Mental Health Specialists)
- Offices of Real Estate Agents and Brokers
- Other Activities Related to Credit Intermediation
- Veterinary Services

The general office market in Huber Heights is not dominated by a particular use. The market is occupied by an even distribution of health care and financial professionals and real estate agents; it is neither extremely healthy or unhealthy.

There is over 200,000 square feet of leasable office space along the corridor. Less than 10 percent of that space is currently vacant; which represents a healthy vacancy rate. It is not uncommon to see vacancy rates of 20 to 35 percent in struggling markets.

Less than 10 percent of office space is currently vacant; which represents a healthy vacancy rate.

The market for suburban office space has been struggling for over a decade. Across the country, isolated office parks are being retrofitted with retail and housing options. While we don't recommend pursuing the development of an independent, large office complex, the entirety of Huber Heights would benefit from an increase in the daytime population. The current employee to resident ratio in Huber Heights is 0.32 to 1. An increase in the daytime population would result in more demand for office space, but it would be a significant boost to the retail market as well.

Table 7.13: Office Space Along Brandt Pike Corridor

Total Square Footage	200,593
Vacant Square Footage	19,365
Vacancy Rate	9.6%
Average Rent per SF per Month	$0.96

Source: Urban Decision Group

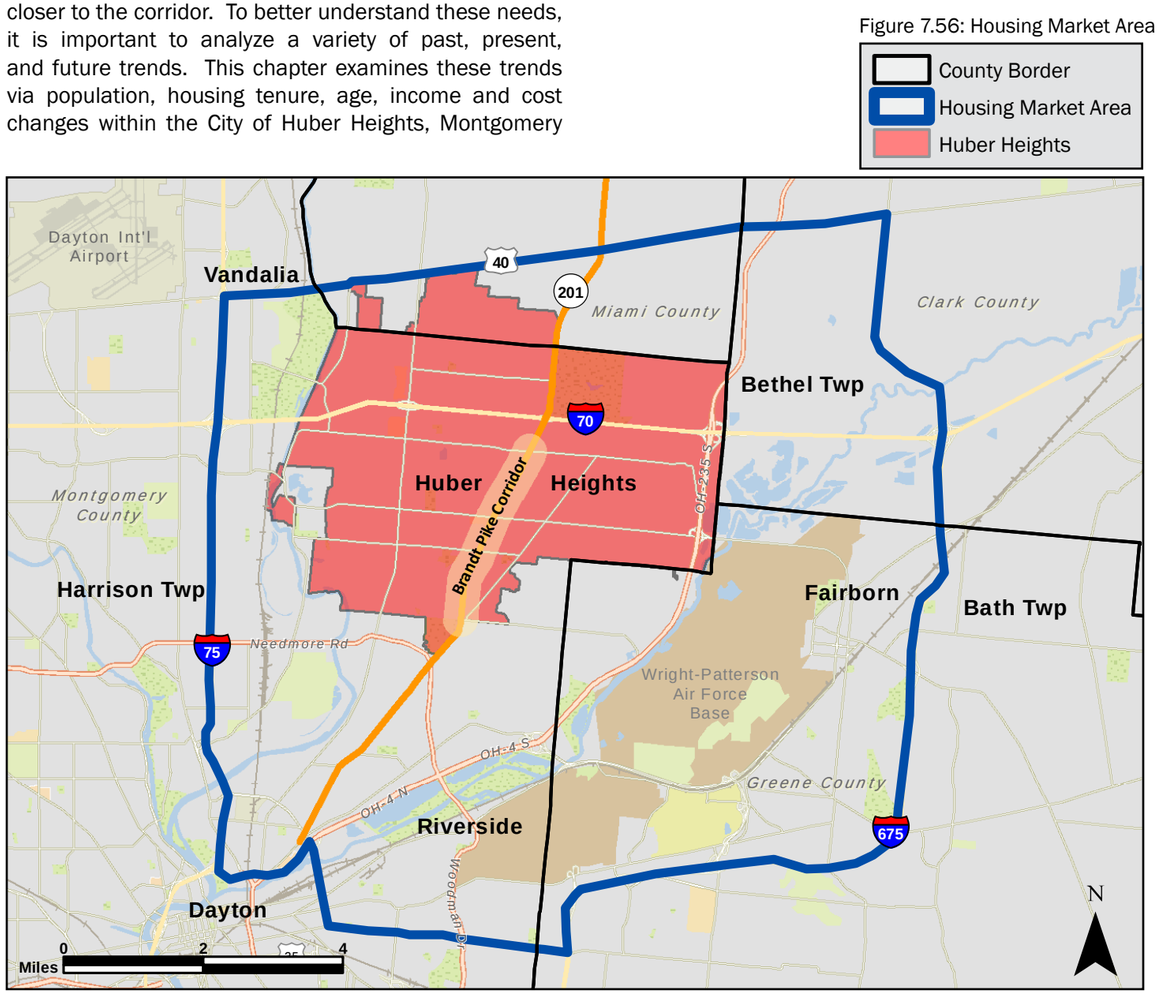
Housing Market

Although Brandt Pike is primarily a commercial corridor, the surrounding housing market plays an important role in the local economy. For most retail businesses — even in the internet age — more customers nearby means more sales. This relationship does not mean, however, that housing along the Pike should be built simply to serve commerce. Housing should be preserved and developed in such a way that serves the needs of residents, businesses and visitors alike. This chapter chronicles where housing along the Pike began, where it stands today and what can be expected in the future based on current trends. The final section offers recommendations on how to capitalize on projected changes and how some negative trends can be reversed for the better.

The Brandt Pike Corridor poses some unique challenges in terms of meeting the housing needs for residents who live along the corridor and those who wish to move closer to the corridor. To better understand these needs, it is important to analyze a variety of past, present, and future trends. This chapter examines these trends via population, housing tenure, age, income and cost changes within the City of Huber Heights, Montgomery County, and the surrounding Housing Market Area (HMA). The HMA (Figure 7.56) is the area from which most of the demand for housing along the corridor originates. Based on the project team's understanding of the housing market through data analysis and field work, the HMA was established using the following boundaries:

- North: National Route (US Route 40)
- East: Interstate 675
- South: Burkhardt Road, Findlay Street, Stanley Avenue, State Route 4
- West: Interstate 75

Figure 7.56: Housing Market Area



Demographics

Long Range Population and Household Growth

Population is the simplest measure we have for evaluating past and future growth. While it does not tell the entire story of a city or neighborhood, it is a good starting point for assessing where we have been and where we are headed. As summarized in Chapter 3, The population in the City of Huber Heights has steadily increased over the last seven years after a decade of decline from 2000 to 2010. According to Esri, a third-party data provider and an international leader in demographic forecasting and analysis, the estimated 2016 population in Huber Heights is 38,771 and is projected to reach 39,056 people by 2021. The number of households within the city is also projected to increase by 2021, but at a faster pace than population.

Within the Housing Market Area, population growth is projected to be negligible between 2016 and 2021, growing at a rate of .01 percent a year.

Within the Housing Market Area, population growth is projected to be negligible between 2016 and 2021 ,growing at a rate of .01 percent a year. Households are projected to grow slightly faster at 0.11 percent a year. Although the HMA covers a four-county region (Montgomery, Miami, Greene and Clark) most of the population resides within Montgomery County, which has been experiencing population decline since 1990. However, as the county's population is projected to see continued decline into year 2021, its household count is projected to rise slightly. This means that the average household size within the county is projected to shrink, from 2.55 persons per household in 2016 to 2.53 persons per household in 2021. This phenomenon is indicative of an aging population – as Baby Boomers grow old and the size of their households shrinks, they are not replaced by larger, younger families as quickly as they would be in previous decades, thus the number of households goes up but the total number of people in those households drops.

The average household size within the city is projected to shrink, from 2.55 persons per household in 2016 to 2.53 persons per household in 2021.

To gain a better understanding of projected population and household trends beyond the year 2021, this analysis uses the Miami Valley Regional Planning Commission's (MVRPC) Traffic Analysis Zone data (TAZ) to establish long-range population projections out to the year 2040. Traffic Analysis Zones are established by the Ohio Department of Transportation for the purposes of organizing data for transportation studies. The TAZ data is first tabulated using 2010 Census Block Group data and then long range population and household forecasts are established at the county level for the entire planning area (Greene, Miami and Montgomery Counties as well as northern Warren County). After the 2040 projections are established for each county, the data is disaggregated to the TAZ level and adjustments are made based on a variety of factors including historic population trends, planned developments and local land use plans.

Because the MVRPC county forecasts use 2010 as a base year and the Esri 2016 estimates are based on more recent Census data, the 2040 projections are adjusted to use the MVRPC annual growth rate from 2010 to 2040 and the 2016 Esri estimates as a new base year. Per these adjusted projections, the population in Huber Heights is expected to grow by 2040, but at a slower annual rate than Esri has projected in the short term. The HMA is also projected to see modest growth by 2040 while Montgomery County is projected to see continual decline. The following tables illustrate the projected population and household growth in Huber Heights, the HMA and Montgomery County.

Table 7.14: Total Population 2000-2040

	Huber Heights		Housing Market Area		Montgomery County	
	Population	Annual % Change	Population	Annual % Change	Population	Annual % Change
2000 (Census)	38,212	-	129,341	-	559,062	-
2010 (Census)	38,101	-0.03%	126,353	-0.23%	535,153	-0.43%
2016 (Estimated)	38,771	0.18%	126,290	0.00%	531,730	-0.06%
2021 (Projected)	39,056	0.07%	126,437	0.01%	530,664	-0.02%
2040 (MVRPC Adjusted)	39,248	0.03%	127,881	0.06%	518,722	-0.12%

Sources: U.S. Census, Esri, Miami Valley Regional Planning Commission

Table 7.15: Total Households 2000-2040

	Huber Heights		Housing Market Area		Montgomery County	
	Population	Annual % Change	Population	Annual % Change	Population	Annual % Change
2000 (Census)	14,938	-	50,207	-	229,229	-
2010 (Census)	14,720	-0.15%	49,739	-0.09%	223,943	-0.23%
2016 (Estimated)	15,153	0.49%	50,108	0.12%	224,555	0.05%
2021 (Projected)	15,339	0.25%	50,383	0.11%	225,329	0.07%
2040 (MVRPC Adjusted)	15,225	-0.04%	50,680	0.03%	218,488	-0.16%

Sources: U.S. Census, Esri, Miami Valley Regional Planning Commission

Population by Age

Age is an important factor in conducting a thorough housing analysis because people have a variety of different needs and desires at different stages in life. Housing options in an area should match those needs. A retirement community for senior citizens functions very differently than an apartment building designed for young professionals. Different generations also have very different spending habits, thus it is important to understand the mix of ages that inhabit a neighborhood to understand what types of businesses will thrive there.

The City of Huber Heights, like many first-tier suburbs around Ohio, is aging rapidly. In the year 2000, the population age 55 and over accounted for 18.6 percent of the population. By 2021 the population age 55 and over - the Baby Boomer generation — is projected to account for 30 percent of the total population. During the same time period, the age cohort of 45 to 54-year olds — typically the highest income earners — is projected to drop from 14.3 percent in 2000 to 12.3 percent by 2021.

By 2021 the population age 55 and over is projected to account for 30 percent of the total population.

In the housing market area, the population age 55 and over is expected to decline from 38 percent in 2010 to 43.4 percent by 2021 while the age cohort of 45 to 54-year olds is projected to rise from 13.6 percent to 11 percent over that same period. This means that over the next five to ten years, there will be a need for both senior rental housing and senior nursing and assisted living facilities.

Figures 7.57 and 7.58 depict the population in each age cohort in the years 2010, 2016 and 2021. There is a steep incline projected in the number of people age 55 and over, both in the city and the HMA. There is also a modest projected increase in those aged 25-44 by 2021. This age group roughly aligns with the Millennial Generation.

Figure 7.57: Huber Heights Population by Age

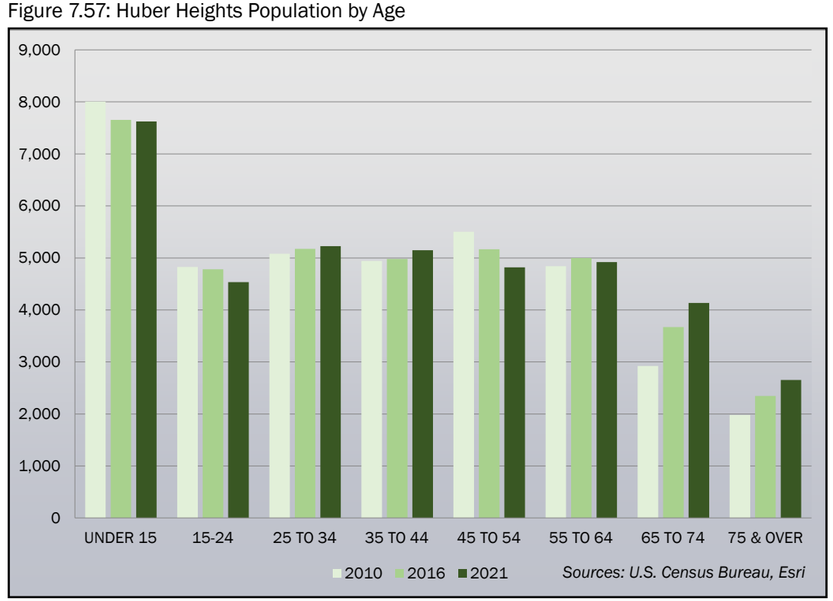
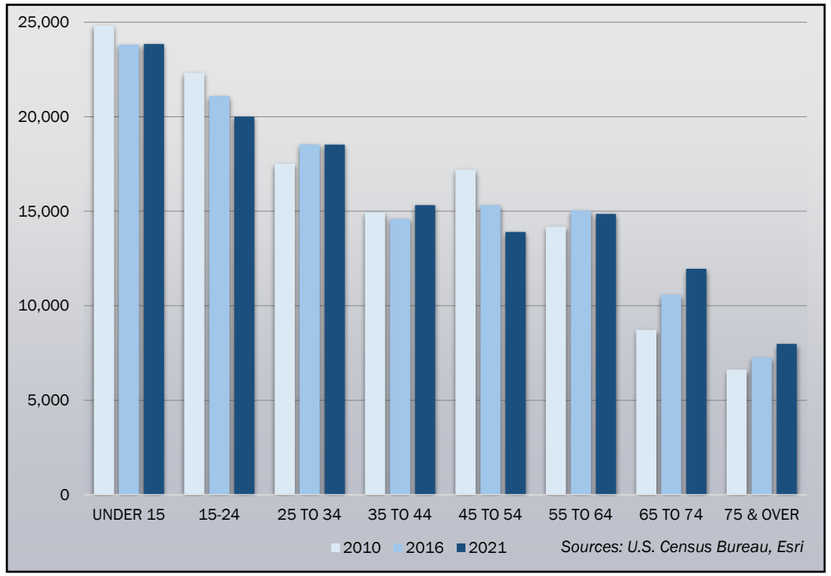


Figure 7.58: Housing Market Area Population by Age



Households by Tenure

Traditionally, suburbs like Huber Heights were thought of as places for families to buy an affordable home on a large lot, removed from the noise and crime of the city. Rental housing was built for those who could not afford a home or did not want one, but was not the primary focus of housing development. This arrangement still holds in true in many parts of the city. However, there has been a shift in homeownership trends over the last 20 years both locally and nationally.

According to the US Census Bureau's American Community Survey, 63.9 percent of all households in the United States were owner occupied in 2015. In the year 2010, this figure was 65.1 percent and in the year 2000 it was 66.2 percent. The decline in homeownership across the country has been attributed to several economic and socioeconomic factors, including the choice by many to delay marriage and purchase a home later in life. In Huber Heights - where the homeownership rate was 72 percent in the year 2000 - owners are projected to occupy only 68.9 percent of the housing market by 2021. In the HMA the drop-off is projected to be even greater: the homeownership rate is expected to drop from 61.5 percent in 2000 to 56.9 percent by 2021.

The Brandt Pike Corridor will need to cater to renters of all incomes and all ages looking for a variety of housing options.

This decline in homeownership portends an increased demand for both affordable and market-rate multi-family housing along the Brandt Pike Corridor, the City of Huber Heights, and the encompassing market area. Single-family home rentals (SFHR's) are helping to fill the supply gap for now, but this is not a long-term solution. As prospective renters – especially Millennials – become less concerned about good school districts and square footage and more interested in living in walkable communities, the Brandt Pike Corridor must compete with other neighborhoods like Downtown Dayton and The Heights north of I-70 where new developments are popping up with a wide range of amenities. The Brandt Pike Corridor will need to cater to renters *of all incomes and all ages* looking for a variety of housing options. Despite an overall projected decline in the homeownership rate in the county, the City and the HMA, homeownership among those ages 65 and over

Table 7.16: Households by Tenure (2000-2021)

	Huber Heights		Housing Market Area		Montgomery County	
	% Owner	% Renter	% Owner	% Renter	% Owner	% Renter
2000 (Census)	72.03%	27.97%	61.47%	38.53%	64.67%	35.33%
2010 (Census)	71.94%	28.06%	60.02%	39.98%	62.97%	37.03%
2016 (Estimated)	69.21%	30.79%	56.97%	43.03%	59.63%	40.37%
2021 (Projected)	68.90%	31.10%	56.89%	43.11%	59.41%	40.59%

Sources: U.S. Census, Esri, Miami Valley Regional Planning Commission

is projected to increase. These people are aging in their own homes either through choice or through financial constraints that don't allow them to move into a senior oriented apartment or a senior living facility. Another factor, as will be discussed further in the senior housing section, is a lack of housing options for seniors at all stages of health and wellness.

Households by Income and Housing Cost Burden

Household income has always been an important measure of purchasing power. The more people make, the more they are able to spend on consumer goods after paying for housing costs. This indicator, however, has been skewed recently as more Americans find themselves paying a higher percentage of their income towards housing costs and having less money leftover to spend on discretionary items. In the City of Huber Heights, the estimated median household income in 2016 is $55,314 and is projected to decrease slightly to $54,179 by 2021. This decline in median household income follows a trend that goes back to the 2006-2010 American Community Survey, which is not surprising given that this survey and the following surveys were taken during and immediately following the Great Recession. The City is projected to add nearly 600 households earning less than $35,000 a year and lose just over 400 households earning over $35,000 a year. Figures 7.3 and 7.4 illustrate the growing disparity among low-income and high-income earners in both Huber Heights and the HMA.

Figure 7.59: Huber Heights Household by Income (2010 to 2021)

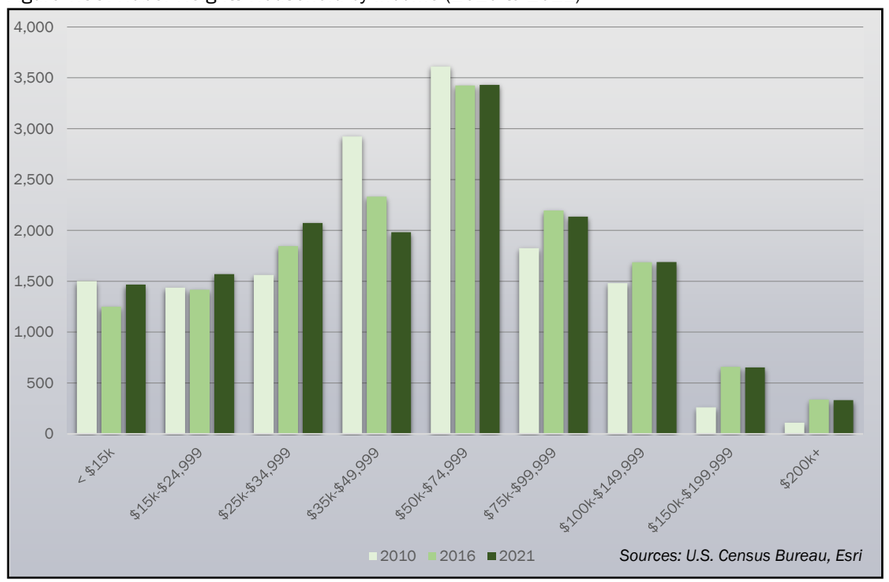
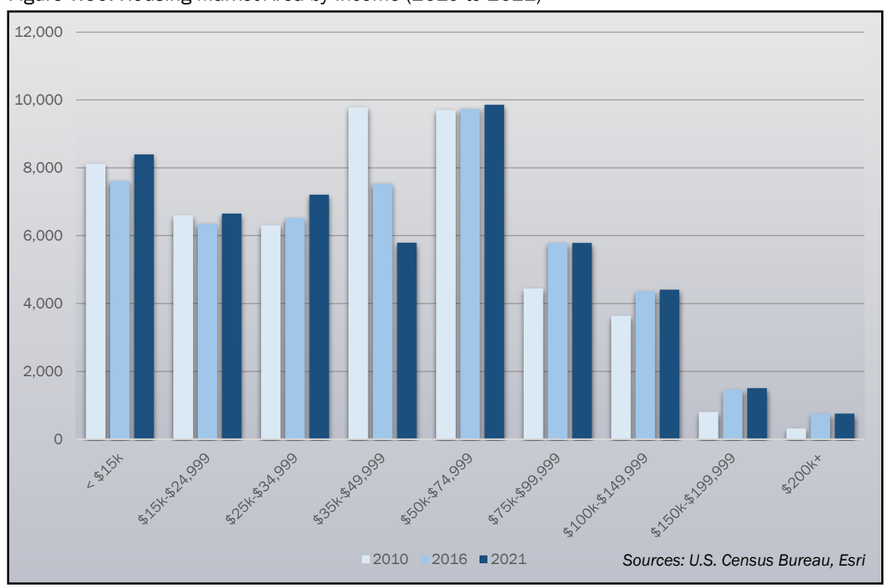


Figure 7.60: Housing Market Area by Income (2010 to 2021)



According to the latest five-year American Community Survey (2011-2015), 24.5 percent of all renters in Huber Heights pay 50 percent of their income towards rent — which is considered severely overburdened by the US Department of Housing and Urban Development. This figure was 13.9 percent in the 2005-2009 survey. While this is a 10.6 percent increase over the two surveys, Huber Heights still has a slightly lower percentage of overburdened renter households than Montgomery County.

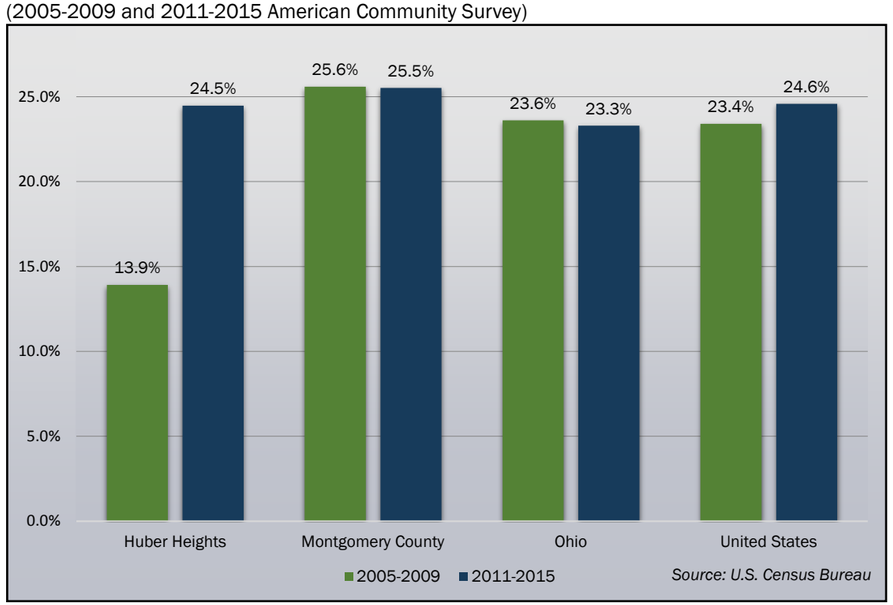
The primary reason for the rise in severely overburdened renters in Huber Heights is two-fold. First, rent prices have increased because demand is outpacing supply. In Huber Heights, the median gross rent was $790 according to the 2005-2009 American Community Survey. This figure rose to $865 in the 2011-2015 survey. Secondly, incomes of renter households have declined. In the 2005-2009 American Community Survey, the median household income for a renter household in Huber Heights was $33,697. According to the 2011-2015 survey it dropped to $31,532.

Severe cost burdens placed on renters have major effects on the housing market. When someone is paying half of their income towards rent, it limits their ability to save money for the down payment on a house or put money into a retirement account. For lower income families, it limits the ability to buy necessities like healthful food, and perpetuates cheap food options along the corridor (there are 12 fast food establishments in the study area).

Providing amenities that cater to people of all ages and incomes is the key to attracting younger, higher earning professionals to the area.

One way to remedy the issue of housing affordability while increasing purchasing power within an area is to develop mixed-income housing at a scale that is great enough to support the surrounding businesses and attract new, more desirable businesses. Providing amenities that cater to people of all ages and incomes — either within new developments our within the community itself — is the key to attracting younger, higher earning professionals to the area while at the same time creating a place that is affordable and desirable to seniors and low-income families.

Figure 7.61: Percentage of Renter Households Paying 50 percent or More of Their Income Toward Rent (2005-2009 and 2011-2015 American Community Survey)



Supply and Demand Analysis

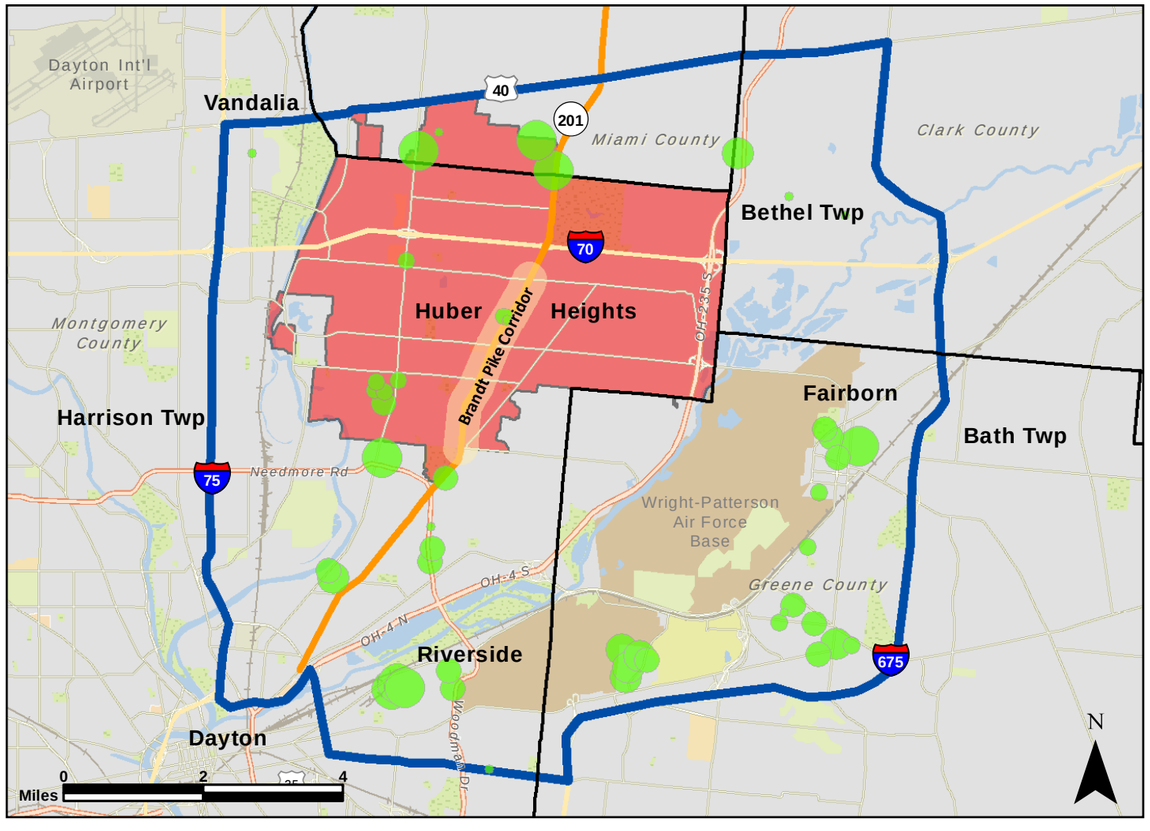
While the previous sections have analyzed housing demographics across a variety of indicators, the following analyses examine future demand in the context of current and future housing supply. The analyses are broken down by rental and for-sale housing.

Rental Housing Supply

Rental housing within the study area is comprised of a mix of single-family homes, attached single-story multi-family housing and four traditional large scale apartment developments. Each of the apartment developments was built prior to 1990 and has a vacancy rate of 6 percent or less. One of the projects is a senior restricted — age 62 and older — Low-Income Housing Tax Credit community, meaning the developer of the property received a portion of public funding to finance development costs in return for keeping a portion of the units affordable. The other communities along the corridor are market-rate family developments. The average rent for a two-bedroom market-rate apartment along the Pike is $654. Just north of the study area, there are four large scale multi-family developments located in Huber Heights north of I-70, three of which are market-rate family and one of which is a senior tax credit project. Two of the projects — The Harrison by Redwood and Northtowne Apartments — are detached apartment homes with an average two-bedroom rent of $1,216. The Waterstone at Carriage Trails is a 192 unit multi-family development that is expected to open in January 2017.

Just south of the Huber Heights city limits in Dayton is the Village at Cloud Park, a 218 unit market-rate development with a 99.5 percent occupancy rate and a waiting list. The average two-bedroom rent is $730. Further south along Brandt Pike is a proposed 55-unit development in Riverside that was awarded housing tax credits in 2016 (some units will also be government-subsidized).

Figure 7.62: Apartment Rental Prices per Square Foot



There are 7,279 apartment units within the entire housing market area.

Within the entire housing market area, there are 59 apartment communities with 20 or more units. There is a total of 7,279 units and the average community size is 122 units. The average year built is 1978 and 35 percent of the units were built during the 1960's. The average rent per square foot for a two-bedroom apartment, shown in Figure 7.62, is $0.75 and the average vacancy rate is 3.3 percent.

In addition to traditional multi-family housing, just over half of all rental product in Huber Heights is comprised of single-family homes. As Table 7.17 illustrates below, one-unit detached structures comprise 51.6 percent of the rental housing stock in Huber Heights. This is 17.6 percent higher than in Montgomery County and 4.3 percent higher than the city in the year 2000. Only 5 percent of renters in Huber Heights live in a building with 10 or more units compared to 21.7 percent in the county. This further emphasizes a need for multi-family housing within the city and along the corridor.

According to the Montgomery County rental registry, 1,993 parcels classified as "One-Family Dwellings" (i.e. Single-Family Homes) are currently being used as rentals. This accounts for approximately 14.6 percent of all single-family homes in the city. Within a half mile of the corridor, 492 of the 3,981 single-family homes are registered as rentals (12.3 percent).

Within a half mile of the corridor, 12.3 percent of single-family homes are rentals.

While the rental registry is not a comprehensive list and does not consider homes in Miami County, it is close to the 2011-2015 American Community Survey figure of 17.5 percent. When compared to surrounding communities, Huber Heights has a lower percentage of SFH rentals than Fairborn (26.1 percent) and Riverside (20.0 percent) and is also lower than Montgomery County (19.9 percent) The cities of Beavercreek (9.6 percent) and Kettering (14.3 percent) both have a lower percentage of single-family home rentals.

The largest holder of single-family home rentals in Huber Heights is Magnetar Capital LLC, which purchased approximately 1,900 homes in and around Huber Heights in October of 2013. After the purchase, they became the single largest land owner in the City. Vinebrook Homes Ohio currently manages the portfolio and acts as the leasing agent.

In addition to a lack of rental options in the City, much of the rental housing stock is old (Table 7.18). While this data does not consider recently built communities

Table 7.17: Rental Housing Units by Number of Units in Structure — percent of All Rental Units (2011-2015 American Community Survey)

Number of Units	Huber Heights	Montgomery County
1, detached	51.62%	34.01%
1, attached	6.41%	8.32%
2	1.70%	5.30%
3 or 4	21.94%	15.73%
5 to 9	13.27%	14.94%
10 to 19	2.62%	9.67%
20 to 49	1.33%	4.19%
50 or more	0.19%	7.06%
Mobile home	0.90%	0.63%
Boat, RV, van, etc.	0.00%	0.14%

Source: U.S. Census Bureau

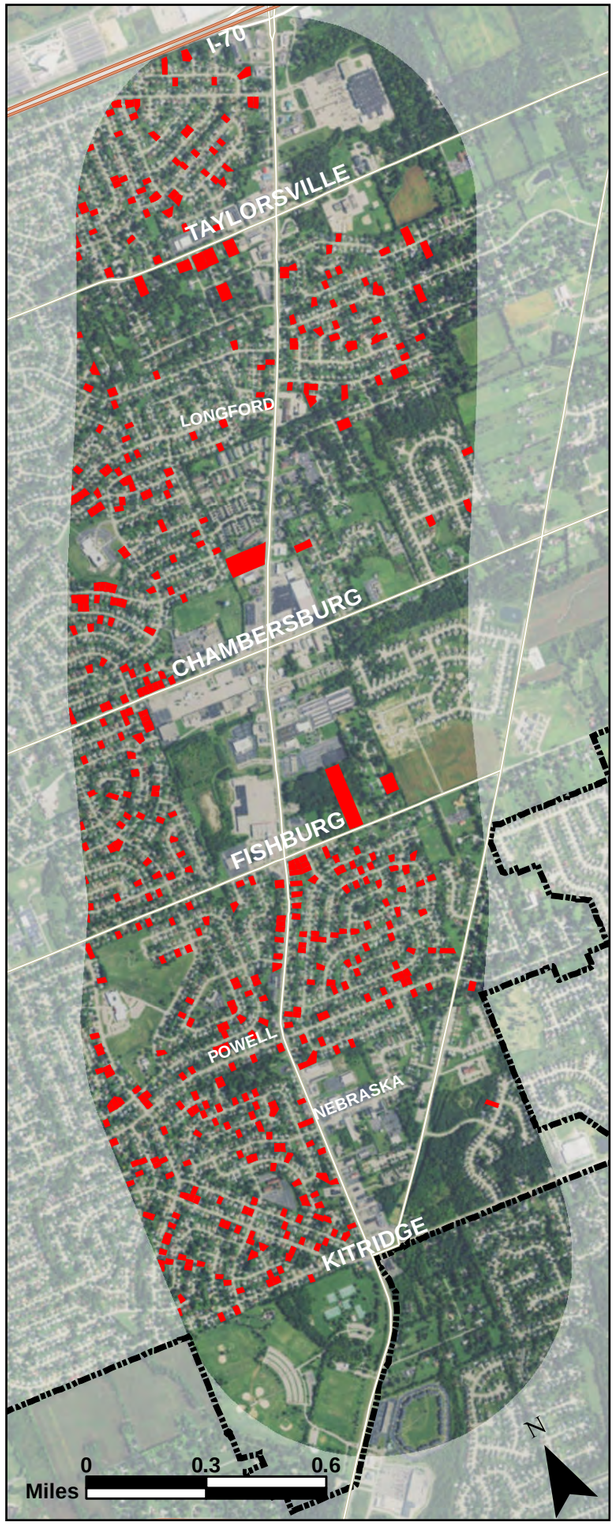


Figure7.63: Single Family Home Rentals

Single Family Home Rentals
Corporation Boundary

in Carriage Trails, it is still a good indicator of the age of the rental housing stock. Close to 90 percent of the rental housing stock in Huber Heights was built prior to 1990 and a majority was built in the 1960's and 1970's. These older rental properties are not nearly as efficient as newer units, thus driving up utility costs and compounding the issue of housing cost burden for lower-income families.

Rental Housing Demand

Tables 7.19 and 7.20 illustrate the supply and demand scenarios for rental housing within the housing market area in the short (5 years) and mid-term (10 years). The following analysis determines how many new rental units need to be built to achieve an ideal rental occupancy rate of 95 percent by 2021.

The number of projected rental households in 2021 was divided by 0.95 to calculate the ideal number of rental units in the market. From this figure, we subtracted the known 21,563 existing units in 2016 (renter occupied households) and the estimated 1,244 vacant units in 2016. The number of vacancies were calculated by applying the American Community Survey's rental vacancy rate of 5.4 percent to the 2016 renter household estimates for each income band. Per the U.S. Census Bureau, vacant rental units include those offered for rent at the time of the survey and those awaiting a new tenant. And while the U.S. Census Bureau does not release any vacancy data detailing number of units per structure, our apartment survey data shows that there are approximately 300 vacancies among the large scale (20 units or more) multi-family communities in the HMA. This means that the rest of the 944 rental vacancies come from single-family homes, duplexes and smaller multi-family developments. After calculating the number of vacant units, the analysis backed out the number of proposed projects in the market area from units needed. Currently there are two proposed multi-family projects within HMA and both are using low-income housing tax-credit projects.

Once all of the existing occupied, existing vacant and proposed rental units were backed out of the desired number of units, the analysis added units back in to account for rental units that will no longer be part of the rental supply by 2021, either through damage, demolition or other means. Data from the American Housing Survey Components of Change Report (CINCH) for 2011 to 2013 were used for these calculations. The report details national loss rates for housing units broken down by tenure and income between 2011 and 2013. We applied these national rates to data within the HMA and expanded them out over a five-year period. Per the CINCH report, rental units occupied by households making $30,000 a year or less are lost at a rate of 0.6 percent a year nationally, while units occupied by household earning over $100,000 are lost at a rate of 0.2 percent a year. As illustrated in Tables 7.19 and 7.20, rental housing demand by 2021 is projected to come from the very low end and very high end of the income bracket. Due to the age of the housing stock, a projected 526 rental units in the market area will no longer be in service in five years, but many of these units will be absorbed by existing vacant units. By the year 2026,

Table 7.18: Rental Housing Units by Year Structure Built — percent of All Rental Units (2011-2015 American Community Survey)

Number of Units	Huber Heights	Montgomery County
Built 2014 or later	0.00%	0.02%
Built 2010 to 2013	0.39%	0.51%
Built 2000 to 2009	4.37%	6.45%
Built 1990 to 1999	4.17%	7.57%
Built 1980 to 1989	15.57%	10.59%
Built 1970 to 1979	37.64%	20.09%
Built 1960 to 1969	21.90%	17.24%
Built 1950 to 1959	10.54%	14.31%
Built 1940 to 1949	0.90%	7.64%
Built 1939 or earlier	4.52%	15.58%

Source: U.S. Census Bureau

Table 7.19: Short-Term Rental Housing Demand (5 Years) Within Housing Market Area

	All Incomes	< $25K	$25K to $50K	$50K to $75K	$75K and up
2016 Renter Households	21,563	9,587	6,239	2,928	2,809
2021 Renter Households	21,718	10,173	5,393	2,818	3,334
Rental Units Needed for Balanced Market (95% Occupied)	22,860	10,708	5,677	2,966	3,509
- Existing Occupied Rental Product (2016 Renter Households)	21,563	9,587	6,239	2,928	2,809
- Existing Vacant Units For Rent	1,244	553	360	169	162
- Planned & Proposed Projects	98	98	0	0	0
+ Units Needed to Replace Obsolete Rental Housing Stock	526	299	134	58	34
Total Units Needed Over 5 Years	**481**	**769**	**-788**	**-72**	**572**

Sources: Esri, Urban Decision Group

Table 7.20: Mid-Term Rental Housing Demand (10 Years) Within Housing Market Area

	All Incomes	< $25K	$25K to $50K	$50K to $75K	$75K and up
2016 Renter Households	21,563	9,587	6,239	2,928	2,809
2026 Renter Households	21,997	10,820	4,573	2,723	3,881
Rental Units Needed for Balanced Market (95% Occupied)	23,154	11,389	4,814	2,866	4,085
- Existing Occupied Rental Product (2016 Renter Households)	21,563	9,587	6,239	2,928	2,809
- Existing Vacant Units For Rent	1,244	553	360	169	162
- Planned & Proposed Projects	98	98	0	0	0
+ Units Needed to Replace Obsolete Rental Housing Stock	1,051	598	268	117	68
Total Units Needed Over 10 Years	**1,300**	**1,749**	**-1,517**	**-114**	**1,182**

Sources: Esri, Urban Decision Group

an estimated 1,300 new units will need to be added to the rental market to achieve 95 percent overall occupancy.

By the year 2026, an estimated 1,300 new units will need to be added to the rental market to achieve 95 percent occupancy.

For-Sale Housing Supply

To understand the current state of the for-sale housing market in Huber Heights and its environs, it is important to understand the circumstances that preceded the existing market. Huber Heights began as a small bedroom community founded by Charles Huber in Wayne Township just north of Dayton in the 1950's. Mr. Huber's Huber Homes project grew over the years and his company eventually built a total of 10,707 single-family homes and 2,258 multi-family units between 1956 and 1992[1]. Because of Mr. Huber's early vision, Huber Heights has two primary distinctions: most of the homes are brick ranch style and there is no downtown. While neither of these attributes are surprising for a Post-World War II community in the Midwest, they do pose some interesting issues in terms of attracting new home-buyers into the community and having a central community gathering space.

Over the last ten years, the median sale price for a single-family home in Huber Heights dropped by $16,750 and the median sale price per square foot dropped by $10.84. Despite this drop, the number of sales and the median sales price have both risen since 2011 (Table 7.21).

Figure 7.64 shows the median list price by city for single-family homes in the Dayton region. For a home in Huber Heights, the median list price is $114,900 and the average number of days on the market is 87. When the list of single-family homes for-sale narrows to within a half mile of the Brandt Pike Corridor, the median list price drops to $84,900 and the average days on market increases to 99. North of I-70, the average days on market for a single-family home is 55 and the median list price is $182,490, more than double the price of homes near the Brandt Pike Corridor. In comparison, the median list price in Beavercreek is $189,700 and $95,000 in Fairborn. The median list price in Montgomery County is $109,900 and $149,000 in Miami County. The average days on the market for a home in Montgomery County is 89.

1. *Huber Heights Chamber of Commerce*

For-Sale Housing Demand

In the for-sale market, supply is projected to outpace demand by 2021. Part of this conclusion assumes that the Carriage Trails development will be completely built out to the proposed 1,300 single-family homes by that time and other single-family developments in the market area will be built out as well. This scenario also assumes a 1.5 percent vacancy rate in the for-sale market and that 1 percent of the housing stock will need to be replaced within five years. Based on projected income by tenure trends, the demand for homes will come primarily from those households making less than $25,000 a year. Based on the age of the owner housing market, these households will likely consist of retirees, where the head of household is age 65 and older and they earn little to no income, but rather have aged in their homes and are living off social security and/or retirement benefits. It is projected that these types of homeowners will continue to grow through 2026 (Tables 7.22 and 7.23).

In the for-sale market, supply is projected to outpace demand by 2021.

In both the short and mid-term, there is projected to be no demand for for-sale housing in the market area overall, but some demand at certain income levels. For instance, while the number of owner households earning between $25,000 and $49,999 is expected to decline, it is estimated that many of these owners are older people retiring and moving to the $25,000 and under income earning category, which explains part of the growth in that income bracket.

As mentioned earlier in the rental analysis, around 14.6 percent of all single-family homes in Huber Heights are currently being rented out. A majority of these homes were built prior to 1980 and, they are not equipped to serve the needs of the current population. As a mid-to-long term strategy, a portion of these SFH rentals could either be placed back into the for-sale market or identified as redevelopment opportunities. While it is not realistic that every single-family dwelling can be taken out of the rental pool, we do feel that this figure can get closer to 10 percent over the next 10 years. This would mean that around 640 single-family home rentals would be taken out of the rental pool and a certain number would be added to the for-sale pool. The following tables depict this scenario and its effects on both the rental and for-sale housing demand over the next 10 years.

Table 7.21: Historic Home Sales in Huber Heights

Year	Number of Sales	Median Sale Price	Average Sale Price	Median Sale Price per Square Foot
2005	651	$112,542	$117,222	$79.16
2006	610	$114,804	$121,638	$80.60
2007	503	$111,879	$116,197	$78.98
2008	462	$114,843	$110,390	$75.68
2009	474	$106,749	$99,362	$72.04
2010	434	$101,345	$100,868	$69.99
2011	447	$94,439	$90,347	$65.31
2012	478	$92,892	$89,782	$62.03
2013	510	$102,084	$92,998	$69.13
2014	546	$108,340	$98,886	$70.58
2015	624	$95,792	$99,095	$68.32

Sources: Dayton Area Board of Realtors, Zilllow

Figure 7.64: Median List Price

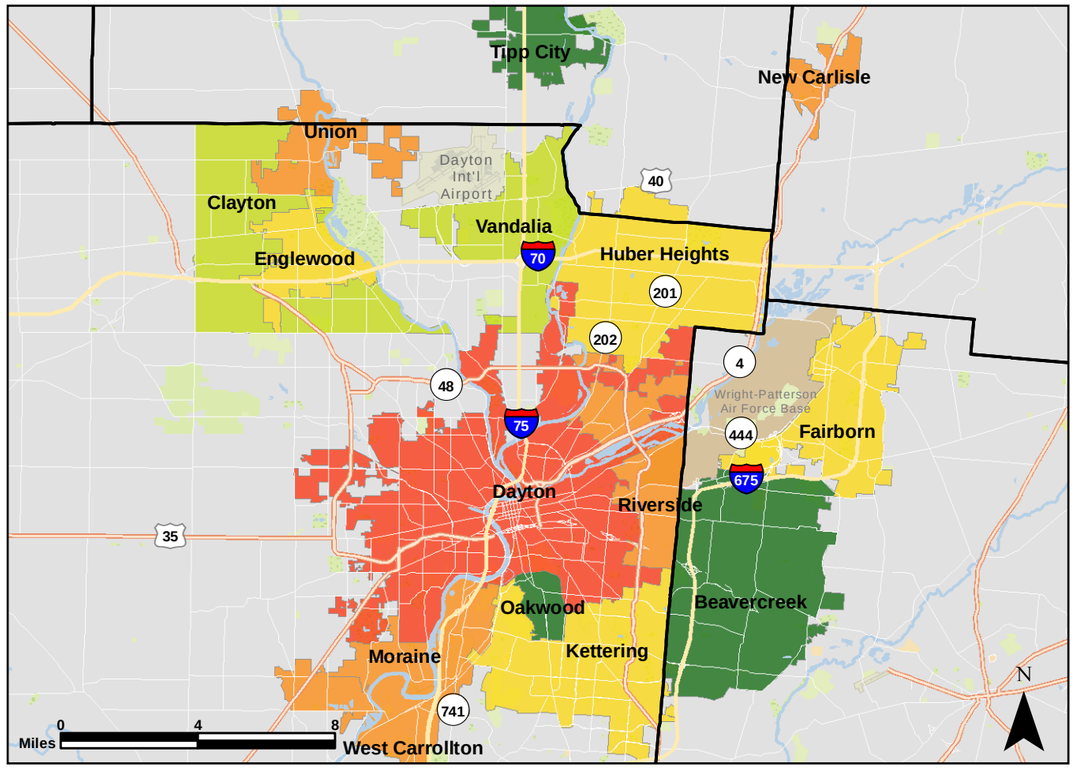


Table 7.22: Short-Term For-Sale Housing Demand (5 Years) Within Housing Market Area

	All Incomes	< $25K	$25K to $50K	$50K to $75K
2016 Owner Households	28,547	4,370	7,817	6,803
2021 Owner Households	28,665	4,878	7,611	7,044
For-Sale Units Needed for Balanced Market (98.5% Occupied)	29,101	4,952	7,727	7,151
- Existing Occupied For-Sale Product (2016 Owner Households)	28,547	4,370	7,817	6,803
- Existing Vacant Units For Sale	671	103	184	160
- Planned & Proposed Projects	762	0	254	254
+ Units Needed to Replace 1% of For-Sale Housing Stock	293	45	80	70
Total Units Needed Over 5 Years	**-586**	**524**	**-448**	**4**

Sources: Esri, Urban Decision Group

Table 7.23: Mid-Term For-Sale Housing Demand (10 Years) Within Housing Market Area

	All Incomes	< $25K	$25K to $50K	$50K to $75K
2016 Owner Households	28,547	4,370	7,817	6,803
2026 Owner Households	28,581	5,348	7,353	7,234
For-Sale Units Needed for Balanced Market (98.5% Occupied)	29,016	5,429	7,465	7,344
- Existing Occupied For-Sale Product (2016 Owner Households)	28,547	4,370	7,817	6,803
- Existing Vacant Units For Sale	668	113	178	164
- Planned & Proposed Projects	762	0	254	254
+ Units Needed to Replace 1% of For-Sale Housing Stock	584	90	160	139
Total Units Needed Over 10 Years	**-377**	**1,036**	**-624**	**262**

Sources: Esri, Urban Decision Group

Table 7.24: Mid-Term Rental Housing Demand (10 Years) Single-Family Home Rental Conversion Scenario

	All Incomes	< $25K	$25K to $50K	$50K to $75K
2016 Renter Households	21,563	9,587	6,239	2,928
2026 Renter Households	21,997	10,820	4,573	2,723
For-Sale Units Needed for Balanced Market (98.5% Occupied)	23,154	11,389	4,814	2,866
- Existing Occupied For-Sale Product (2016 Renter Households)	21,563	9,587	6,239	2,928
- Existing Vacant Units For Sale	1,244	553	360	169
- Planned & Proposed Projects	98	98	0	0
+ Units Needed to Replace Obsolete Rental Housing Stock	1,051	598	268	117
+ Units Needed to Replace 640 SFH Rentals	640	160	160	160
Total Units Needed Over 10 Years	**1,940**	**1,909**	**-1,357**	**46**

Sources: Esri, Urban Decision Group

Table 7.25: Mid-Term For-Sale Housing Demand (10 Years) Single-Family Home Rental Conversion Scenario

	All Incomes	< $25K	$25K to $50K	$50K to $75K	$75K and up
2016 Owner Households	28,547	4,370	7,817	6,803	9,557
2026 Owner Households	28,581	5,348	7,353	7,234	8,646
Rental Units Needed for Balanced Market (95% Occupied)	29,016	5,429	7,465	7,344	8,778
- Existing Occupied Rental Product (2016 Owner Households)	28,547	4,370	7,817	6,803	9,557
- Existing Vacant Units For Rent	668	113	178	164	213
- Planned & Proposed Projects	762	0	254	254	254
+ Units Needed to Replace Obsolete Rental Housing Stock	584	90	160	139	195
- 640 SFH Rental Units Added back to for-sale market	640	160	160	160	160
Total Units Needed Over 10 Years	**-1,017**	**876**	**-784**	**102**	**-1,211**

Sources: Esri, Urban Decision Group

Housing demand within the market area creates some unique issues along the Brandt Pike Corridor. As homeowners who live on or near the Pike age in their homes and eventually move into apartments or senior living facilities, their homes will need to be re-absorbed into the for-sale market. As the demand for these types of homes shrinks and newer homes are being built elsewhere, vacancies will continue to rise unless this issue is addressed. One way to address this issue is to target clusters of homes along the corridor that are either vacant or being used as rentals and market them as redevelopment opportunities. Another option is to work with rental agencies, primarily Vinebrook Homes, to incentivize them to improve their homes and sell them as a way to induce demand for new multi-family product along the corridor.

Another more aggressive approach is to enforce owners to register their rental properties with the county. As of now, Montgomery County has no way to enforce rental registration, even though it is state law in Ohio. Identifying owners of single-family home rentals would allow the city to better track them and enforce penalties for not registering their property. It would also make it easier to identify clusters of homes that are primed for redevelopment.

Senior Multi-family Housing

Perhaps more than any other age group, senior citizens benefit the most from multi-family that is rich in amenities designed to fit their needs. Right now, there are very few developments in the area that were built specifically for adults age 55 and over. Many seniors stay in their homes until it is no longer an option or move in with relatives. Therefore, the market for senior multi-family housing within Huber Heights and the surrounding market area is very favorable to new development. There are only five large-scale senior developments located within the HMA, all of which are either tax credit or government subsidized. The newest development, Carriage Trails Senior Villas, built 34 units in 2012 and has 46 more units planned to open in 2017. There are no more planned senior developments in the HMA.

On the demand side, it is projected that 330 units will need to be added to the market by 2021 to achieve a balanced, 95 percent occupied rental market for senior households.

Senior Facility Demand

In addition to traditional multifamily and single-family housing, there is a need in the City and the surrounding market area for senior living facilities. Between 2016 and 2021, the population age 75 and over within the HMA is expected to increase by 10 percent. As discussed earlier, many of these people are aging in their homes and lack access to the type of care and amenities that a senior community can provide.

In order to calculate the five-year demand for different levels of care (independent living, assisted living, and nursing care) we calculated the number of qualified seniors age 75 and over based on projected income and net worth in 2021. To estimate the cost for each

Table 7.26: Senior Housing Projects within Housing Market Area

Project Name	City	Type	Total Units
Carriage Trails Senior Village	Huber Heights	Tax Credit	34 (46 Planned for Phase II)
Pheasant Run Senior Apartments	Dayton	Market-rate/Tax Credit	75
River Cross Way Apts.	Dayton	Government Subsidized	23
Mad River Manor Apartments	Dayton	Government Subsidized	74
Village Park Apartments	Huber Heights	Government Subsidized	41

Sources: Esri, Urban Decision Group

Table 7.27: Rental Housing Demand Households Age 55 and Over Within Market Area

2016 Renter Households	4,617
2021 Renter Households	4,954
Rental Units Needed for Balanced Market (95% Occupied)	5,215
- Existing Occupied Rental Product (2016 Renter Households)	4,617
- Existing Vacant Units For Rent	266
- Planned & Proposed Units	101
+ Units Needed to Replace Obsolete Housing Stock	99
Total Units Needed Over 5 Years	**330**

Sources: Esri, Urban Decision Group

facility type, we used the average monthly cost in the state of Ohio for each level of care and assumed that 20 percent of each person's financial resources would be used for medical and personal expenses, leaving 80 percent for facility fees. Because of the lack of senior facility options within the housing market area and the growth of the senior population, we project a high demand for each level of care over the next five years. Even taking into account the planned 101 bed Danbury of Huber Heights facility in Carriage Trails, there is still a shortage of beds in the area.

Table 7.28: Independent Living Household Demand (Year 2021) Within Housing Market Area

Average Annual Fees ($2,450 x 12)	29,400
Amount Spent on Meds and Personal Items (20% of Financial Resources)	7,350
Total Annual Cost (Income Requirement)	36,750
Three Year Cost (Net Worth Requirement)	110,250
Net Worth Qualified Households 75+	3,621
Net Worth Qualified Households 75+ HH'S (1-Person)	**1,811**
Income Qualified 75+ HH'S Based on Income (1-Person)	7,514
Assuming 60% Overlap with Net Worth Qualified Households	**3,006**
Total Asset and Income Qualified Households Within HMA	**4,817**

Sources: Esri, Urban Decision Group

Table 7.29: Assisted Living Household Demand (Year 2021) Within Housing Market Area

Average Annual Fees ($3,600 x 12)	43,200
Amount Spent on Meds and Personal Items (20% of Financial Resources)	10,800
Total Annual Cost (Income Requirement)	54,000
Two Year Cost (Net Worth Requirement)	108,000
Net Worth Qualified Households 75+	3,641
Net Worth Qualified Households 75+ HH'S (1-Person)	**1,820**
Income Qualified 75+ HH'S Based on Income (1-Person)	5,409
Assuming 60% Overlap with Net Worth Qualified Households	**2,164**
Total Asset and Income Qualified Households Within HMA	**3,984**

Sources: Esri, Urban Decision Group

Table 7.30: Nursing Care Household Demand (Year 2021) Within Housing Market Area

Average Annual Fees ($6205 x 12)	74,460
Amount Spent on Meds and Personal Items (20% of Financial Resources)	18,615
Total Annual Cost (Income Requirement)	93,075
One Year Cost (Net Worth Requirement)	93,075
Net Worth Qualified Households 75+	3,779
Net Worth Qualified Households 75+ HH'S (1-Person)	**1,890**
Income Qualified 75+ HH'S Based on Income (1-Person)	2,116
Assuming 60% Overlap with Net Worth Qualified Households	**846**
Total Asset and Income Qualified Households Within HMA	**2,736**

Sources: Esri, Urban Decision Group

Chapter 8: Existing Conditions Conclusion and SWOT Analysis

Part I examined the community as a whole and Brandt Pike's physical characteristics, inducing transportation, natural, and built environments, as well as the current state of the commercial and housing markets. Before moving onto the Redevelopment Plan and associated recommendations in Part II, this chapter summarizes the findings of Part I.

SWOT is an acronym for Strengths, Opportunities, Weaknesses, and Threats. A SWOT analysis is a structured planning method that evaluates these four elements for a company, project, or place. In this case, the SWOT analysis focuses on the Brandt Pike corridor and the surrounding study area in Huber Heights. Before a SWOT analysis can be conducted, a specific objective must be identified for the project. Then, internal and external factors effecting the objective are examined to determine whether the objective is attainable. In this case, the project's goal is to plan for redevelopment along the Brandt Pike corridor.

Chapters 3-7 describe in detail the factors effecting that objective. Table 8.1 lists the strengths, weaknesses, opportunities, and threats for each of the five existing conditions areas:

1. Community
2. Natural Environment
3. Built Environment
4. Transportation Environment
5. Market and Economy

A page number is included after certain entries, indicating where that element is discussed in more detail. The opportunities listed in the table are described in Part II: Recommendations.

Table 8.1: SWOT Analysis

Table 8.1, continued

	Strengths	Weaknesses	Opportunities	Threats
Community	Central location in the Miami Valley Region (2)	City population peaked in 1999 (7)	New development should accommodate aging population (49)	Continued population decline
	High-income community (12)	Population has decreased between 2000 and 2009 by 13 % but has stabilized since	Densest part of the community is in the southeast quadrant and between Taylorsville Road and I-70	Rapid aging population
	Diverse population in age and race (10-11)	Higher unemployment rate (8.3%) than the State of Ohio (5.2%)	Potential for increase in population with a revitalized housing market	No or very little change in employment rate
Natural Environment	Most soils along the Pike are well drained (14)	Limited number of significant natural features along the corridor that contribute to sense of place (13)	Preserving and planting trees in strategic locations not only helps the environment, but can also improve property valuation	Increased impervious surface without corresponding provision of additional "pervious" surfaces or open space to accommodate runoff may tax stormwater facilities
	High development potential, few limiting environmental factors (22)	Few water features including, ponds, streams, and drainage swales in the study area (17)	Favorable soil conditions along the corridor create opportunities for urban farming	Existing wetlands may be harmed by pollutants in stormwater runoff unless properly filtered
	Strong tree canopy on residential segments of the corridor (13)	Lack of regulations to protect remaining natural features	Sufficient land area to accommodate additional vegetative cover, especially within existing tree lawn along Brandt Pike to provide shade for pedestrians and calm traffic flow	
Built Environment	Multiple civic uses in close proximity (26)	Low density, auto-oriented development with separation between typically compatible uses (31)	Vacant and underutilized land in strategic locations	Continued disinvestment with reduced occupancy, deferred maintenance, and deteriorating site and building conditions.
	Most buildings along the corridor are in good condition (25)	Single-use buildings with limited ability to accommodate alternative uses	Alternative, more urban development forms can be made compatible with Brandt Pike's sub-urban pattern (29)	Increased impacts of e-commerce on "bricks and mortar" commercial sales
	Concentration of commercial uses at major intersections	Disconnection between street (public realm) and adjacent property (private realm)	Growing interest in compact, walkable, mixed-use, development	Potential impact of future development in Huber Heights gravitating toward more undeveloped, greenfield sites

Table 8.1, continued

Table 8.1, continued

	Strengths	Weaknesses	Opportunities	Threats
Transportation Environment	Presence of transit (36)	Auto-dominated environment (30)	Growing demand for mixed-use, walkable, and transit oriented development	Perception that corridor is too congested (32)
	Most freight traffic bypasses the corridor (36)	Irregular intersection geometry (32)	Wide roadway offers room for changes to accommodate all modes	
	Complete sidewalk network in the public right-of-way (38)	Low transit ridership (36)	Decline in traffic volumes over the past three years means less congestion	
	All signalized intersections along the corridor have pedestrian signals (38)	Outdated pedestrian pushbuttons (38)	Opportunity to improve signal timing, coordinate with ODOT signals at I-70	
	Curb ramps throughout study area (38)	No pedestrian amenities connecting right-of-way to adjacent land uses (41)	Under-used parking lots offer redevelopment opportunities (46)	
	No pedestrian or bicycle fatalities recorded since 2011	Long block lengths (41)	Consolidate curb cuts for better access management	
		Auto-centric lighting at night (42)	Public desire and momentum to see roadway improvements	
		No bicycle facilities (43)	Encourage Transit-Oriented Development	
		Excessive use of commercial curb cuts (44)	Possible connections to future regional bikeways (43)	
Commercial and Housing Markets	Major anchor institutions like Dayton Metro Library and Good Samaritan Medical Center	High retail vacancies	Dayton Metro Library seeking site to build new facility.	Growth north of I-70 threatens to fragment the market
	Proximity to WPAFB	Single use commercial buildings dominate the area	Major property owners interested in redevelopment along Pike.	Commercial vacancies
	Stable office market	Oversupply of substandard retail units	Growing consumer demand for mixed-use, walkable, and transit oriented development.	Changing consumer shopping preferences
	Support for local markets and merchants (i.e. the Farmer's Market)	Inflexible property configurations	Redevelopment of aging, functionally obsolete multifamily housing	Housing supply expected to outpace demand in five years
		Very low daytime population	Population growth expected within Huber Heights and environs	Absentee landlords and impact of deferred maintenance
		Relatively low incomes and consumer expenditures	Aging community and projected lack of housing options	
		Lack of multifamily rental options (affordable to market rate)	Several industry sectors under supplied when compared with demand	
		Lack of high quality (Class A) office space		

Part II: Recommendations

Chapter 9: Redevelopment Plan

This chapter provides a clear visualization of Brandt Pike's redevelopment potential. Along with Chapter 10, Implementation, the Plan helps direct future private and public sector investment along the corridor and serves as a basis for regulating future infill and redevelopment. It grew out of the previous analysis from Part I of this report, including the corridor's natural, built, transportation, and economic environments and direct involvement from the public (see Appendix II: Public Involvement Process). The Plan is guided by the following Planning Principles:

- ***Create a walkable environment with a healthy mix — both horizontal and vertical — of commercial and residential uses.***
- ***Place civic uses — parks, schools, churches, and libraries — at the core of neighborhoods.***
- ***Transform Brandt Pike from an auto-oriented roadway to a route for safely accommodating multiple modes of travel: auto, transit bicycle and pedestrian.***
- ***Reduce the size of blocks, consolidate access, and improve street connectivity.***
- ***Increase the diversity of residential and commercial building types to allow a wider variety of living, working, and shopping choices.***
- ***Concentrate redevelopment at key strategic locations, and at both community and neighborhood scales to serve as a catalyst for future growth.***
- ***Incorporate the corridors natural features, including topography, slope, and native vegetation, into each project.***

The Redevelopment Plan for the corridor has three major elements:

1. Public Realm (Transportation Improvements)
2. Private Realm (Built Environment Improvements)
3. Commercial and Housing Markets

A fourth element, regulatory reform, is addressed in Appendix III.

The Public Realm section focuses on improvements in the public right-of-way that will guide Brandt Pike towards a more inclusive transportation environment. Facilities that accommodate pedestrians, bicyclists, transit users, and people with disabilities are proposed in this section. Recommendations for traffic management, roadway geometry, and access management are also presented, along with best practice examples and the advantages and challenges of each proposed improvement.

The Private Realm section addresses the changes that will occur along Brandt Pike to further evolve the corridor into a mixed-use and multimodal center of activity in Huber Heights. This section presents a generalized Redevelopment Concept for the entire corridor that identifies priority areas in which redevelopment efforts should focus. It lays out Land Use and Circulation alternatives for two of these priority areas (Community and Neighborhood Centers). The Private Realm section concludes with an Illustrative Plan of how the Community Center area would develop in phases, and what it might look like at full development.

The final section explains what steps are needed to revitalize Brandt Pike as an economically strong commercial corridor, as well as how to improve the housing market in the area. Some of the strategies in this section include reducing the overall supply of "Class C" retail and office space along the corridor, reducing the number of single-family rentals, and incentivizing the development of affordable housing.

Public Realm (Transportation Improvements)

As a road, Brandt Pike balances multiple identities that are often at odds with one another. Traffic volume, speed, and its southern terminus near Dayton's Central Business District, demand that it act as a major thoroughfare, conveying people and goods through the City. However, Brandt Pike also acts as a major commercial corridor. Vehicles traveling to the high concentration of businesses along the Pike require convenient access, and frequent turning movements and curb cuts create a hazardous environment for through-traffic. Finally, suburban, tree-lined segments of Brandt Pike are lined with single-family homes whose driveways have direct access to the road. These three identities, a commuter street, a commercial street, and a neighborhood street, can and do successfully coexist along many roads. But to address the needs of each identity, the City will need to customize its improvements along the entire corridor.

This section outlines improvements in the public realm, from changes in roadway geometry to minor adjustments in signal timing. Phasing of immediate, near-, mid-, and long-term recommendations is presented in Chapter 10.

Roadway Geometry

Intersections with tight curb radii and right angles are safest for all users. They slow traffic, reduce crossing distances for pedestrians, and increase sight distance. While there are significant benefits, the cost of realigning major roadways to eliminate skewed intersections is prohibitive in most cases. Many cities facing this problem have resorted to smaller, equally effective countermeasures to increase pedestrian safety at irregular intersections.

Pedestrian Islands

Also known as pork chop islands because of their triangular shape, pedestrian islands (Figure 9.1) are placed in the intersection, between a right-slip turn lane and a through lane. Right-slip turn lanes separate turning movements from through traffic, decreasing delays and creating a more predictable environment.

Pedestrian islands break the crossing into two segments: a short leg across the right-slip turn lane, and a long leg, across the through lanes. Some islands are equipped with pedestrian signals, giving them the right-of-way across the turn lane, while others are yield-controlled. Islands have a raised curb with trenched sidewalks.

Figure 9.1: Pedestrian Island

Pedestrian Island

Objective: *Channelize right-turn movements and minimize pedestrian exposure during crossing.*

Proposed Application: at *Chambersburg (Phase I), at Taylorsville (Phase II), at Fishburg (Phase III).*

Advantages
- *Divides crossing into shorter lengths.*
- *Better sightlines for pedestrians and drivers.*
- *Improves signal timing.*
- *Reduces crashes.*

Challenges
- *May obstruct snow plowing.*

Reduced Corner Radii

Reduced corner radii (Figure 9.2) are used at intersections to make vehicle turning movements slower. Minimizing the size of a corner radius creates more compact intersections, improves motorist and pedestrian sight distance, and shortens crossing distances. A standard curb radius is 10 to 15 feet, but many cities reduce curb radii to as small as two feet . The presence of emergency vehicles, buses, and heavy trucks should be considered before reducing corner radii, and designs should accommodate large vehicles while still restricting the turning speed of smaller vehicles.

Application

With pedestrian islands and reduced corner radii installed at the Chambersburg intersection (Figure 9.3), crosswalks could be realigned to form regular, right-angled lines that are easier for pedestrians to navigate, shorten the crossing distance, and create a more predictable environment. These improvements would also increase pedestrian connectivity between land uses on opposite sides of the intersection. Similar treatments could eventually be installed at other major intersections on the Pike (Fishburg Road and Taylorsville Road). Islands should be placed to channelize traffic turning onto Brandt Pike from intersecting roads.

Access Management

According to the City's 2011 Comprehensive Plan, Brandt Pike is classified as a minor arterial, multi-lane road. This type of road "has *more limited access* to individual properties and higher travel speeds." While Brandt Pike's speed limit would fall under this category, the road allows for direct access to almost all adjacent properties, from single-family homes to shopping centers. Accessibility supports businesses and allows convenient access for residents, but its value must be balanced against the safe and efficient movement of road users along Brandt Pike[1].

Restricting access is one of the most transformative and effective ways to improve a street for all users, and should be one of the first changes to occur during redevelopment. Future road improvements could consolidate extraneous curb cuts that provide access to the same business. Transferring residential access from driveways to alleys along parts of Brandt Pike would be a more drastic change. Reducing the number of curb cuts would also make the road safer for bicyclists and pedestrians. The City's Comprehensive Plan encourages access management regulations that emphasize pedestrian safety.

1. One study found that increasing the number of access points from 10 to 20 per mile on major roads increased the crash rate by 30 percent. Transportation Research Board. (1999). Impacts of Access Management Techniques.

Figure 9.2 : Reduced Corner Radii

Reduced Corner Radii

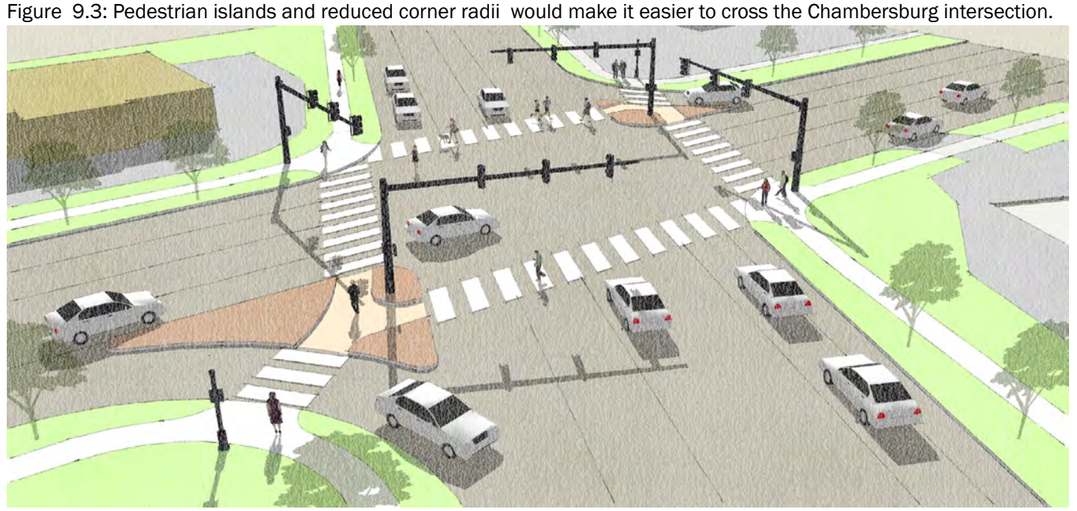
Objective: *Creates more compact intersections with defined space for pedestrians.*

Proposed Application: *Chambersburg Intersection.*

Advantages
- *Reduces turning speeds.*
- *Shortens crossing distance.*
- *Improves sight distance.*

Challenges
- *May complicate turning movements for large vehicles.*

Figure 9.3: Pedestrian islands and reduced corner radii would make it easier to cross the Chambersburg intersection.



ODOT's State Highway Access Management Manual categorizes SR 201 as Access Category III. This designation does not extend to the Brandt Pike segment of SR 201 because the City of Huber Heights, not ODOT, maintains jurisdiction of the road. However, applying Access Category III operational standards to Brandt Pike provides some direction for access management efforts along the corridor.

Direct private access to and from Category III highways is limited to right turns, with some exceptions. Right-turn-in/out control decreases delays for mainline traffic and eliminates conflict points, resulting in lower crash rates.

Consolidate Curb Cuts

To reduce curb cuts along a busy road, existing driveways are recurbed, cutting off access between the road and properties adjacent to it. Traffic is redirected to consolidated access points (Figure 9.4).

Efforts to consolidate curb cuts are often incorporated into city code. The Town of Pleasant Valley, NY included the following guidance in its zoning code:

1. *To help minimize the number of curb cuts, all opportunities for shared access and rear-lot connections shall be pursued, both with new projects as well as redevelopment of existing sites.*
2. *The removal of excessive or unnecessary existing curb cuts is strongly encouraged in order to reduce the number of vehicular/pedestrian conflict points and to enhance the walkability of the districts.*
3. *No curb cut should be placed within 50 feet of an intersection[2].*

Median

Medians (Figure 9.5) are a common form of access management. A median is any type of barrier that separates opposing traffic on a two-way street. Unless there is a break in the median at an intersection, medians block turning movements and through traffic on intersecting streets and driveways. They reduce pedestrian crashes by 39 to 46 percent and decrease motorist delay by 30 percent[3]. Medians can be landscaped or made of concrete or other materials. Lighting and signage for pedestrian crossings can also be included. Landscaped or tree-lined medians have the added benefit of visually narrowing the roadway, which calms traffic and beautifies the street.

Application

In the short-term the City should work with stakeholders to reduce redundant access points to the same businesses and encourage sharing of access points between adjacent businesses. Participants at public meetings and in the online survey use Brandt Pike to travel between businesses that are directly next to one another, but do not share access. Creating driveways between adjacent parking lots, which could eventually lead to a grid of service roads parallel to the Pike, would reduce turning movements in busy commercial areas on and off of the Pike.

As a first step, 20 curb cuts, totaling 860 feet, could be eliminated from Brandt Pike if adjacent businesses consolidated their access points. This goal could be accomplished with no additional drive aisles or other internal site circulation changes between parking lots. The City should require future developers to abide by shared access and parking arrangements.

Businesses who depend on automobile traffic often resist when a city or transportation agency proposes restricting access. However, prices, service, and brand recognition have a much greater impact on consumer decisions than changes in access management. According to the Federal Highway Administration, "Access management has no impact on the demand for goods and services,"[4] and may actually increase customer flow. Property values and sales volumes tend to remain stable or increase after access management projects are introduced.

On residential segments of Brandt Pike, alley access with parking in the back would eliminate half of the curb cuts along the corridor. However, most residential properties on the Pike do not have enough space to install alleys, and this change could face strong resistance from homeowners. As an alternative, a median would restrict left turns out of driveways. Future residential development should use shared access and alley parking to avoid creating new curb cuts on Brandt Pike.

Replacing a two-way left-turn lane (or TWTL), such as the one along most of Brandt Pike, with a raised median has a profound effect on driver behavior, safety, and streetscape aesthetics. Turning left across multiple lanes of traffic to exit a parking lot and using the TWTL as an acceleration lane is a dangerous yet frequent maneuver along the Pike. Replacing the TWTL with a median would channelize left-turning traffic into U-turn lanes at midblock directional median openings. While there is a public perception that U-turns are dangerous, one study found that right turns followed by U-turns resulted in a lower crash rate than designs allowing direct left turns[5].

Initially, the City could use medians to restrict access at Brandt Pike's commercial centers, and eventually extend the median to the Pike's residential segments.

In addition to improving traffic flow and reducing conflict points, restricting access with a median and consolidating curb cuts would reduce the multiple threats that pedestrians currently face when crossing a driveway entrance or exit. The median could also be used for pedestrian refuge at midblock crossings, breaking the crossing into two segments.

Pedestrian Facilities

As discussed in Chapter 6, Brandt Pike already has a robust sidewalk network and other pedestrian facilities, such as curb ramps and pedestrian signals. Most of the changes that will transform the Pike into a walkable environment will take place in the private realm. The City can encourage walkable development by requiring zero setbacks with parking in the rear for new businesses, for example. In the public realm,

2. *Town of Pleasant Valley, NY*

3. *Federal Highway Administration. (2012). Raised Median Islands and Pedestrian Safety.*

4. *Federal Highway Administration. (2015). Safe Access is Good for Business*

5. *Michigan Department of Transportation. (2009). An Evaluation Of Right-Turn-In/Right-Turn-Out Restrictions In Access Management*

Figure 9.4: All of the businesses in this shopping center are served by one driveway on the main road.

Consolidate Curb Cuts

Objective: *Use shared access between businesses to eliminate curb cuts.*

Proposed Application: *Adjacent businesses on Brandt Pike.*

Advantages
- *Reduces turning movements.*
- *Channelizes local traffic off of Brandt Pike.*
- *Creates a more continuous sidewalk network.*

Challenges
- *Stakeholder buy-in and cooperation are key.*

Figure 9.5: Median

Median

Objective: *Reduce conflicts between turning and through traffic and pedestrians, and channelize access to adjacent land uses.*

Proposed Application:
- Commercial Only: *Brandt Pike from Kitridge Road to 5210 Brandt Pike, and from Fishburg Road to Leyden Lane.*
- Commercial and Residential: *Kitridge Road to Taylorsville Road.*

Advantages
- *Breaks up long crossings into two stages.*
- *Channelizes turning traffic.*
- *Calms through traffic.*

Challenges
- *Reduces accessibility to adjacent land uses.*
- *Resistance from business owners.*

there are several improvements the City can make to its existing pedestrian infrastructure that will complement new, walkable developments.

Pedestrian Signals and Timing
All signalized intersections on Brandt Pike already have pedestrian signals. The placement of pedestrian pushbuttons and signal timing could be improved at certain intersections.

The Manual on Uniform Traffic Control Devices (Section 4E.08) recommends that a pushbutton be placed between 1.5 and six feet from the curb, parallel to the crosswalk, and no further than five feet from the curb ramp, so that users do not travel out of their way to activate the signal. If two perpendicular crosswalks both have pushbuttons, they should be placed at least 10 feet apart[6].

The MUTCD also recommends that pedestrian signals be set to "recall to walk" along major roads and in pedestrian-oriented areas. This allows pedestrians to cross minor side streets without having to use a pushbutton. In addition, the pedestrian signal should be set in a "resting walk" phase, so that pedestrians are allowed to cross a minor street at any time during the green phase on the major street. Walk signals along Brandt Pike could be reprogrammed to meet these standards.

Accessible Pedestrian Signals, or APS, (Figure 9.6) use audible and vibrotactile indicators to communicate with pedestrians. APS use a tone or speech and a vibrating tactile arrow or other surface on the button to indicate when the walk signal is green. Currently, the MUTCD does not require these features; however future editions and other accessibility standards, such as the Public Right-Of-Way Accessibility Guidelines (PROWAG), will likely require APS-compliance for all pedestrian signals.

The 2009 edition of the MUTCD requires countdown displays for all pedestrian signals, rather than the flashing hand or "Don't Walk" display. Countdowns are more intuitive for all road users and have been shown to significantly reduce pedestrian-vehicle crashes.

Midblock Crossing
Midblock crossings are located between signalized intersections, giving pedestrians a safe and controlled location to cross. There are many iterations of midblock crossings, and the design and features of any particular treatment depend on several factors, including sight lines, motorized traffic volumes and speeds, pedestrian volumes, and land use, amongst others. Some of these components are described on the following pages.

High-Visibility Crosswalk
Crosswalks with longitudinal markings (Figure 9.7) are more visible to drivers than crosswalks with transverse stripes across the street (lateral markings). This pattern is standard practice in many cities.

6. *Federal Highway Administration. (2009). Manual on Uniform Traffic Control Devices.*

Figure 9.6: Accessible Pedestrian Signal pushbutton

Pedestrian Signal Improvements
Recall to Walk/Resting Walk Phases
Pushbutton Placement
Accessible Pedestrian Signal

Objective: *Extend walk phase, accommodate pedestrians of all abilities.*

Proposed Application: *All signalized intersections.*

Advantages
- *Allows more time to cross large intersections.*
- *Provides audio and vibrotactile feedback.*
- *Does not affect signal timing for vehicles (except for turn arrows).*

Challenges
- *N/A*

Advance Yield Sign
Advance yield signs (Figure 9.8) are used for midblock crossings that traverse multiple lanes of traffic in the same direction. Oftentimes, traffic in the right lane that yields to a pedestrian waiting to cross the street blocks the pedestrian's view of oncoming traffic in the left lane. Due to poor sight lines, traffic in the left lane may not yield to the pedestrian in time to avoid a crash. This scenario, known as a multiple threat crash, can be avoided by installing advance yield signs before the crosswalk. These signs direct traffic to stop further back, opening up sight lines and reducing the risk of collision. Signs are set back 20 to 50 feet from the crosswalk, often accompanied by an advance yield line, or shark's teeth, and double white lines to indicate no passing.

Rectangular Rapid Flashing Beacon
Rectangular Rapid Flashing Beacons, or RRFBs, (Figure 9.9) are a relatively new form of warning signal. They remain dark until a pedestrian activates them, increasing motorists' awareness of pedestrians and reducing rear end collisions. Because they are only activated when needed, RRFBs provide a safe alternative to full traffic signals while striking a balance between vehicle and pedestrian levels of service. Their irregular flash patterns are similar to emergency vehicle lights, which catch the attention of drivers more effectively than a steady flash pattern. In the past several years, they have been widely deployed at midblock crossings to increase pedestrian visibility.

Median
Medians, discussed earlier as an access management tool, are also an important component of midblock crossings. Medians are associated with a 46 percent reduction in pedestrian crashes at marked crosswalk locations, and a 39 percent reduction at unmarked

Figure 9.7: High-Visibility Crosswalk

High-Visibility Crosswalk

Objective: *Improve visibility at crosswalks.*

Proposed Application: *Midblock and corner crossings.*

Advantages
- *Longitudinal markings are more visible to motorists.*
- *Stripes can be placed to avoid wheel paths, reducing wear and tear on crosswalk.*

Challenges
- *Costlier than standard crosswalk markings.*

Figure 9.8: Advance Yield Sign

Advance Yield Sign

Objective: *Open sightlines at midblock crossings to reduce multiple threat pedestrian crashes.*

Proposed Application: *Midblock crossings.*

Advantages
- *Motorists look more frequently and sooner for pedestrians.*
- *Reduces multiple threat scenario and crash rate.*

Challenges
- *N/A*

locations[7]. Similar to pedestrian islands, they break long crossings into two segments, allowing pedestrians to focus on crossing one direction of traffic at a time. Medians should be installed on roads with speeds 40 mph or above and more than 15,000 vehicles daily.

Illumination

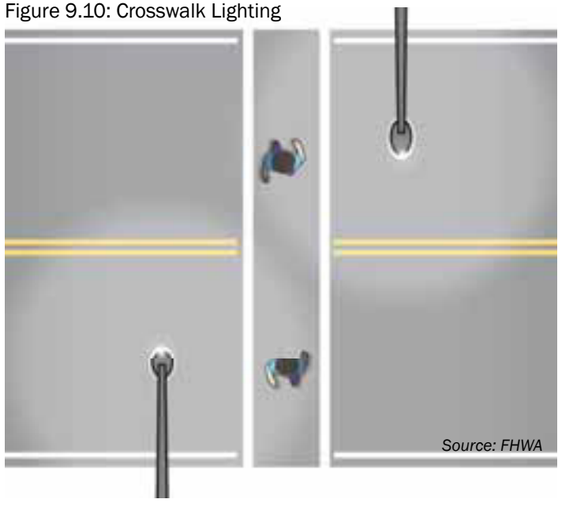
Although only one quarter of pedestrian travel occurs in the dark, up to 50 percent of pedestrian crashes take place at night. Lighting is an essential component for any crossing; it reduces the odds of pedestrian fatalities by 42 percent at midblock locations[8]. Light fixtures placed between the crosswalk and oncoming traffic (Figure 9.10) are most effective at making pedestrians visible to motorists.

7. Zegeer, C., Stewart, R., Huang, H., and Lagerwey, P. (2002). *Safety Effects of Marked vs. Unmarked Crosswalks at Uncontrolled Locations: Executive Summary and Recommended Guidelines, FHWA-RD-01-075.*
8. *Federal Highway Administration. (2016). Designing for Pedestrian Safety.*

Figure 9.9: Rectangular Rapid Flashing Beacon

Source: NACTO

Figure 9.10: Crosswalk Lighting


Source: FHWA

Application

Brandt Pike's block lengths are exceedingly long, which encourage speeding and contribute to an auto-oriented environment. Pedestrians will almost always cross the street where it is most convenient for them, and rarely travel out of their way to cross at a light. Given this behavior, and the anticipated new developments along the Pike, installing midblock crossings between nodes of high activity could prevent pedestrian crashes and risky behavior.

Bicycle Facilities

As discussed in Chapter 6, all bicyclists observed on Brandt Pike traveled on the sidewalk instead of in the road. Although using the sidewalk does offer more separation from traffic than traveling in the road, it also reduces bicyclists' visibility to motorists and forces them to cross over frequent curb cuts. Turning vehicles do not expect to encounter fast-moving objects on the sidewalk and sight distances are sometimes obscured at driveway entrances, which can result in crashes. Providing designated bicycle facilities in the road that are buffered from traffic would maintain bicyclists' visibility, reserve the sidewalk for pedestrian use, and encourage safer, more convenient travel for all modes.

Two-Way Cycle Track

Cycle tracks are protected bike lanes that use landscaping, bollards, or paint to separate bicyclists from vehicles. A two-way cycle track (Figure 9.11) allows travel in both directions on one side of the road and often requires less space than two separate bike lanes on either side of the road. Two-way cycle tracks are used on busy roads where most destinations are on one side, and where there is extra right-of-way on one side.

Application

A two-way cycle track could be installed on Brandt Pike as part of a road diet (Figure 9.12). There are many bike-friendly destinations near the corridor and

Rectangular Rapid Flashing Beacon

Objective: *Uses bright, rapid flashing pattern to warn drivers when pedestrians are in crosswalk.*

Proposed Application: *Midblock crossings.*

Advantages
- *Higher yield rate than traditional crossings.*

Challenges
- *Should only be used on multi-lane roadways where medians are present.*

Crosswalk Lighting

Objective: *Illuminate pedestrians in crosswalk for oncoming motorists.*

Proposed Application: *Midblock crossings.*

Advantages
- Provides better illumination for pedestrians than, tall, auto-oriented lighting.
- Makes pedestrians more visible to motorists.

Challenges
- *N/A*

Figure 9.11 : Two-way cycle track


Source: NACTO

Two-Way Cycle Track

Objective: *Channel active transportation activity towards new development.*

Proposed Application: *Fishburg Road to Chambersburg Road.*

Advantages
- *Provides more protection than a standard bike lane. May require less space than two separate bike lanes on either side of the road.*
- *Typically used on streets where most destinations are one side, and on streets with high traffic volumes and speeds.*

Challenges
- *May cause conflicts with turning vehicles.*

Figure 9.12: A two-way cycle track could serve new development on the west side of Brandt Pike.

in close proximity to residential neighborhoods, such as the Dayton Metro Library Huber Heights Branch, Saint Peter School, and numerous shops and businesses. Visiting these points of interest would require less than a one mile ride for many residents. If appropriate facilities were installed along the corridor linking these destinations, people would choose to leave their cars at home more often. During its initial phase, Huber Center and neighboring properties will be the primary focus of this revitalization plan. If major trip generators remain on the west side of the Pike, accommodations for active transportation should focus there as well. A two-way cycle track on the west side of Brandt Pike, next to southbound motorized traffic, would channel bicyclists towards these destinations. Because of the Pike's wide right-of-way, the road could accommodate this new facility, as well as a median, while maintaining two travel lanes in both directions.

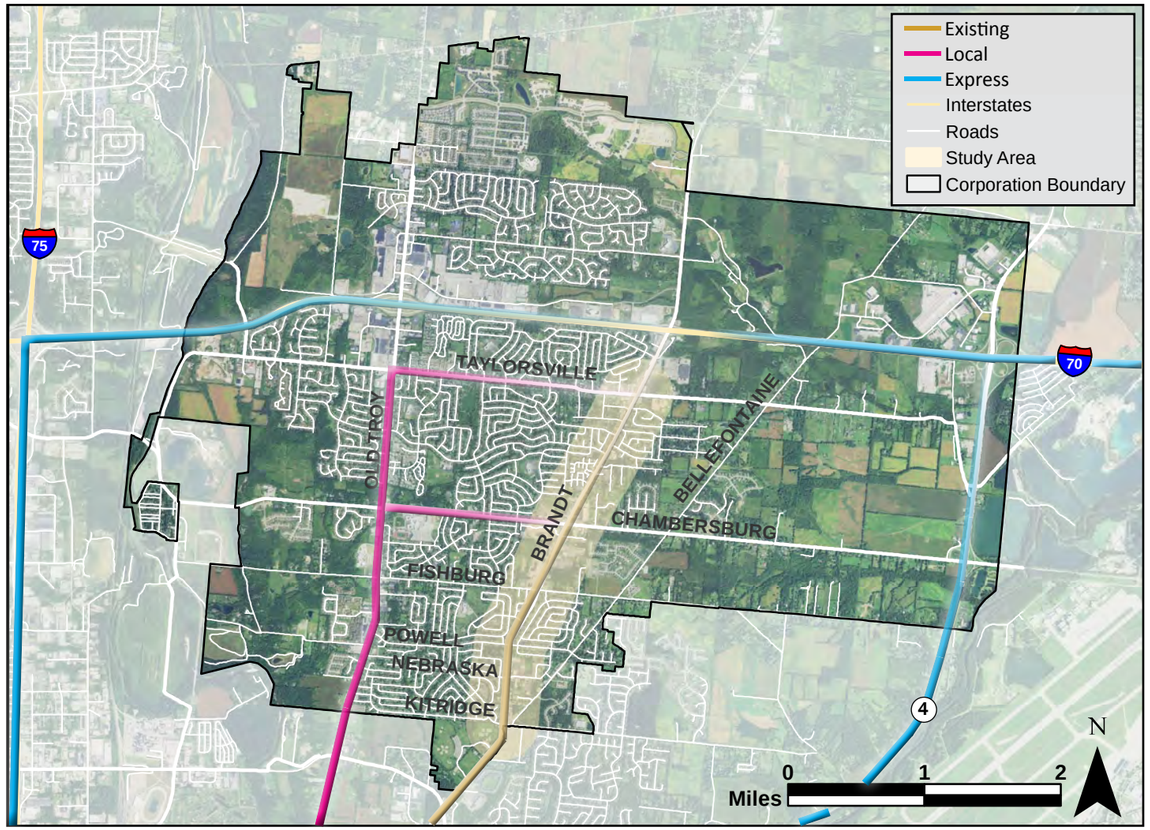
Traffic Calming and Aesthetics

As discussed in Chapter 6, traffic volumes on Brandt Pike, especially between the I-70 interchange and Chambersburg Road, are some of the highest in the region on a state route. Moving forward, if a greater emphasis on the Pike's role as a neighborhood street and commercial corridor is deemed a priority, its role as a commuter route will need to be diminished. Fortunately, there are several other north-south roads and highways in the area that offer alternative routes to Brandt Pike (Figure 9.13 and Table 9.1). To the west, State Route 202/Old Troy Pike is one mile away and I-75 is 3.5 miles away. State Route 4 and I-675 are three and five miles east of Brandt Pike, respectively. These alternative routes could accommodate traffic that is diverted off of the Pike to reduce volumes and create a more liveable public realm.

Table 9.1: Alternate Commuter Routes

	Minutes	Miles
Existing Commuter Route		
Brandt Pike	21	10
Local Routes		
Taylorsville and Old Troy Pike	23	11.3
Chambersburg and Old Troy Pike	23	10.9
Express Routes		
I-70 and I-75	16	12.8
I-70 and SR 4	17	14.2
I-70 and I-675	21	18.7

Figure 9.13: Alternate Commuter Routes



Using the Taylorsville and Chambersburg alternatives, or local routes, in Table 9.1, it takes 23 minutes to drive from the Brandt Pike and I-70 interchange to Downtown Dayton, compared to 21 minutes on Brandt Pike. From the same starting point, express routes take approximately 16 minutes to reach Downtown Dayton (the I-675 route starts at the I-70 and I-675 interchange, an alternative for westbound traffic on I-70). These time difference are negligible, and support a case for diverting through-traffic off of Brandt Pike.

Although it is beyond the scope of this report, future efforts could involve traffic simulation and modeling that predicts the effects of reducing volumes on Brandt Pike and dispersing traffic onto other roads.

Traffic calming measures are used to manage vehicular speed and volume. Elements such as narrowed lanes, textured pavement, curb extensions, and on-street parking reduce speeds and discourage cut-through vehicular traffic. Other traffic calming measures, such as landscaping, lighting, and public art, enhance a streetscape aesthetically and functionally, creating more pleasant and safer spaces for bicyclists, pedestrians, and transit users. Traffic calming elements that could be applied to Brandt Pike are described below.

Road Diet

A road diet (Figure 9.14) reduces travel lane widths or removes them completely to make room for wider sidewalks, bicycle facilities, landscaping, on-street parking, and other traffic calming treatments. Treatments range from a simple, relatively inexpensive restriping to moving the curb lines and physically narrowing the road. As a whole, some of the improvements already discussed in this section — such as medians and a cycle track — function as a road diet.

Streetscape Aesthetics

The overall look and feel of a streetscape can slow traffic as effectively as a road diet. Street trees planted in the treelawn, the unpaved area between the curb and the sidewalk, create a visual envelope, in effect narrowing the road from curb to curb. Decorative, pedestrian-scaled lighting that illuminates the sidewalk reminds motorists that they are sharing a public space with other users. Improved transit stops with benches and shelters, or clearly marked signs, encourage pedestrian activity.

Application

To accommodate a median and a two-way cycle track in the existing pavement width, travel lanes on the Pike would need to be narrowed, resulting in a road diet. Narrowed lanes, in conjunction with other improvements like landscaping, lighting, and improved pedestrian and bicycle facilities, will reduce speeds on Brandt Pike and encourage through-traffic to use alternative routes.

Figure 9.14: A landscaped median creates a road diet effect, narrowing travel lanes.

Road Diet

Objective: *Reduce traffic speeds and volume, divert through-traffic away from Brandt Pike.*

Proposed Application: *Throughout corridor, in conjunction with medians and two-way cycle track*

Advantages

- *Improves mobility for bicyclists, pedestrians, and transit-users.*
- *Unites other strategies into one cohesive roadway improvement.*

Challenges

- *Traffic concerns may not be addressed immediately due to cost and duration.*

Transit stop signs that are currently located on utility poles outside a pedestrian's field of vision should be replaced with freestanding signs that clearly mark each stop. Eventually, if redevelopment encourages more transit use, stops should be upgraded with benches, shelters, and public art.

A safer, more convenient, and beautified public realm will galvanize development in the private realm along Brandt Pike. When an area is redeveloped with a mix of uses, it becomes more walkable, less dependent on auto travel, and less likely to increase congestion. Those living within a quarter mile of the Pike will find it easier to make daily trips without depending on driving. Similarly, transit will then become a more viable way to travel as the ability to walk to and from transit stops is improved. The recommended changes to the transportation environment on the Pike will encourage — and be supported by — the appropriate type and form of redevelopment. The nature of that redevelopment is described in the following section.

Figure 9.15: Landscaping, lighting, and street furniture

Streetscape Aesthetics

Objective: *Use landscaping, lighting and street furniture to calm traffic and improve pedestrian environment*

Proposed Application: *Throughout corridor*

Advantages

- *Low-cost improvements can yield large aesthetic benefits*

Challenges

- *Selecting soft and hardscape materials that are easily maintained and contextually appropriate.*

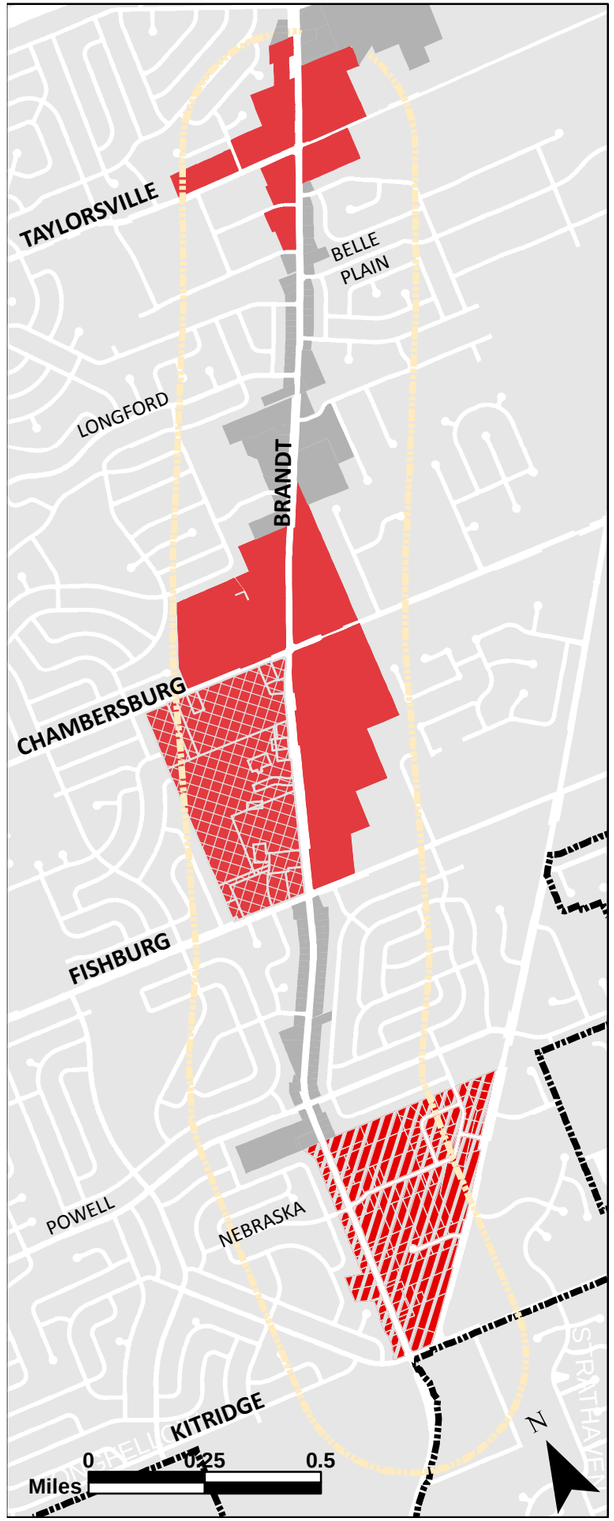


Figure 9.16: Redevelopment Concept

Mixed-Use Nodes
Neighborhood Center
Community Center
Corridor Segment
Roads
Study Area
Corporation Boundary

Private Realm (Built Environment Improvements)

The Land Use and Buildings plan is divided into three sections: a generalized Redevelopment Concept for the entire corridor; Land Use and Circulation alternatives for two specific areas (Community and Neighborhood Center), and an Illustrative Plan of how the Community Center area (where Huber Center is currently located) would develop in phases and what it might look like at full development.

Redevelopment Concept

As described in Chapter 5, Built Environment, commercial development has historically concentrated at the three major intersections with Brandt Pike — Taylorsville Road, Chambersburg Road, and Kitridge Road — with mostly single family, multifamily, and civic uses fronting the Pike in between the three intersections. Community-scale commercial and civic uses surround the Chambersburg Road intersection, with neighborhood-scale uses located around the Taylorsville and Kitridge intersections. This development, however, is mostly "single-use,"(one use on one lot) and one-story, which requires significant land area to accommodate required parking.

As Figure 9.16 shows, the bulk of future development and redevelopment within along the Pike could continue around each intersection on already vacant or underutilized land; but only if built compactly and in a mixed-use, walkable pattern, such as that described in Chapter 5. Not only will development in these areas take advantage of existing infrastructure, but building in a mixed-use pattern will allow uses that have opposing peak operating times to share more centralized parking space. Building

more compactly also means that pedestrians will have less distance to travel between destinations. And by providing streets, preferably public, for access (instead of multiple driveways), additional parking can be provided on-street (Figure 9.17).

The shallower, single-family residential parcels lying between the three intersections and fronting Brandt Pike could then be consolidated into larger parcels and redeveloped as multi-family townhomes or row houses. Combining these larger parcels would require fewer curb-cuts for access, improve walkability, and help reduce auto crashes.

This area between the corridor nodes could also include units that appeal to a younger generation without families, who require only a limited amount of housing space. This "missing middle" housing is situated in the housing market between single family residences and apartment housing. It can take the form of smaller housing units or as accessory dwelling units. Figure 9.18 shows how an accessory dwelling unit — in this case, a carriage house — can be placed above a garage as part of a townhouse development. Allowing this type of living arrangement not only attracts an underserved segment of the housing market, but allows for an unobtrusive way to increase density.

Community and Neighborhood Centers

The concept of focusing future development and redevelopment at nodal locations along the Pike was a part of the Vision outlined in the 2011 Comprehensive Plan for Huber Heights. Two "Character Action Areas" adjacent to the Pike were recommended for reinvestment and enhancement. They include two of the three areas shown in Figure 9.16: the areas surrounding the Chambersburg Road intersection and the Kitridge Road intersection. In the 2011 Comprehensive Plan, these areas were "designated to promote and facilitate efforts to redevelop within Huber Heights." According to the Plan, major themes to be addressed in the two areas include:

1. The importance of high-quality development standards in the redevelopment and maintenance of quality places.
2. The importance of incremental change and long-term vision for these areas because it could be many years before they fully redevelop.
3. The importance of public/private partnerships in achieving redevelopment and infill.
4. The importance of targeted and managed growth in limited economic markets in balancing the demand for new growth with the sustainability of existing development.
5. The connection between the demand for uses in these areas and in the Grow & Enhance Areas as being responsive to parts of the same markets.

Based on the Comprehensive Plan's recommendations and on the results of the Community Workshop, the consensus was to concentrate or "focus" a more detailed planning and design effort on two of the three corridor nodes, around the Chambersburg Road and Kitridge Road intersections.

Analysis

Located southwest of Chambersburg Road and Brandt Pike, the Community Center area is made up of nearly 92 acres, 30 percent of which is undeveloped. As seen in Figure 9.19, the Community Center area is bounded by institutional and commercial uses on the north, mostly commercial uses on the east, low density, single family residential on the south, and low density residential on the west. The site forms one entire block, is nearly one-half mile in length, and there is only one public street that accesses the site (Good Samaritan Way), which functions as a driveway for the medical facility. With the exception of this property, all of the parcels have at least one and sometimes multiple access points on Brandt Pike and Chambersburg Road. Two streets within the residential area west of the site — Storck Drive and Liebold Drive — dead end at the site's western boundary. A major grade change prevents the extension of Storck Drive into the site.

Figure 9.17: Mixed-Use building with on-street parking

Figure 9.18: Carriage house

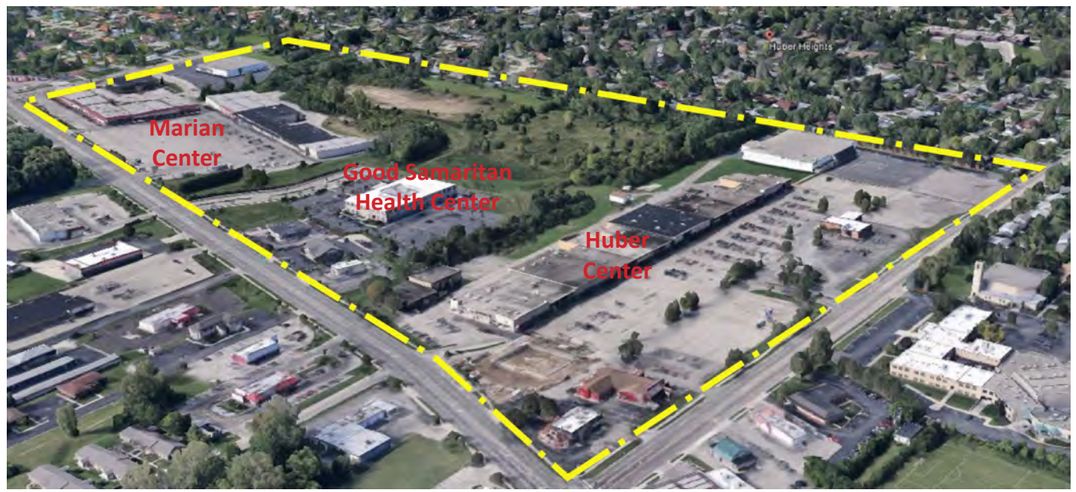
Huber Center occupies the largest amount of building area on site. The center fronts on Chambersburg Road and includes mostly retail uses, with the exception of the Dayton Metro Library Huber Heights Branch and two City of Huber Heights offices. The Marian Shopping Center fronts on Brandt Pike, and contains mostly retail uses. Several outparcels are located in front of Huber Center on both Brandt Pike and Chambersburg Road. Both Huber Center and Marian Center are set back nearly 400 feet from Chambersburg Road and Brandt Pike, respectively.

The Good Samaritan Health Center medical office building is located directly south of Huber Center. Along with the Dayton Metropolitan Library Huber Heights branch, the Huber Heights Athletic Foundation, several City offices, and the Huber Heights Branch of the U.S. Postal Service make up the bulk of the institutional uses on site. Except for the medical office building, all buildings on-site are single story with off-street surface parking. There are no residential uses located on the site.

As described in Chapter 4, most of the site drains to the south and west into a swale that flows directly behind the Marian Center. A small pond is located in a wooded area south and west of the Marian Center. There is a noticeable difference in grade of roughly 50 feet between the higher Chambersburg and Brandt Pike street elevations and the lower, mostly vacant area behind Huber Center and Marian Center. A tree row extends along the southern boundary of Huber Center and several mature tree stands are found behind Marian Center and the U.S. Postal Services Branch Office. The balance of the undeveloped site also contains soils that are not only suitable for development, but uniquely suited for agricultural use as well.

Figure 9.19: Community Center area, existing conditions aerial

Figure 9.20: Community Center area, existing conditions birds eye view



The Neighborhood Center Area is located at the northeast quadrant of the Brandt Pike and Kitridge Road intersection. The 90 acre site shown in Figure 9.20 (looking north and eastward) is bounded by a single family residential neighborhood to the north, a low density residential area to the east, and a blend of single family and retail to the south. Single family units, each with their own driveway access, front on Brandt Pike to the west of the site. Several lots in this area have been combined to form larger commercial parcels.

The site includes a wide range of uses, from light industrial, office, retail, and entertainment uses to single family residential. The buildings that house these uses are single-story buildings with on-site parking, smaller in scale than the Community Center site, and more oriented toward the neighborhood. Nebraska Avenue is the only roadway that traverses the site, connecting Brandt Pike to Bellefontaine Road via Susie Lane. It also links to Broomall Street and the neighborhood to the north.

Unlike the Community Center site, the Neighborhood Center site includes two pockets of multifamily residential. Single-story, three to four unit multifamily buildings are located at the site's northeast corner, (along Nebraska Avenue, Misty Lane and a portion of Bellefontaine Road). The properties contain minimal tree cover/landscaping with parking grouped in the front yard, creating a continuous curb-cut. The second pocket includes ten, single-story four-unit buildings situated along Leeper Street and two-story, four to seven unit structures clustered around a private access drive. Parking occupies nearly two thirds of the front yard.

Figure 9.21: Neighborhood Center area, existing conditions aerial

Proposed Land Use and Circulation

Based on the analysis in Part I, Land Use and Circulation concepts were prepared for each Focus Area. The plans were reviewed by the Stakeholder Group and presented during the community workshop.

Community Center

The proposed Land Use and Circulation Plan for the Community Center site provides a broad mix of uses that includes residential, office, retail, and an expanded area for institutional uses. As Figure 9.23 shows, retail, office and residential uses are located in mixed-use buildings concentrated at the northern part of the site off of Chambersburg Road and at the southern end of the site adjacent to the Fishburg Road and Brandt Pike intersection. Open space is provided in two strategic locations: as a plaza at the southwest corner of Chambersburg Road and Brandt Pike, and as a park adjacent the residential area east of the site. Institutional uses are accommodated in three locations:

1. At the north part of the site (to include space for a civic use).
2. At the central portion of the site (including the existing medical building and a possible assisted living facility).
3. At the site's southern boundary, to include the existing post office. Multifamily residential uses are located directly adjacent to the mixed-use areas.

Figure 9.22: Neighborhood Center area, existing conditions birds eye

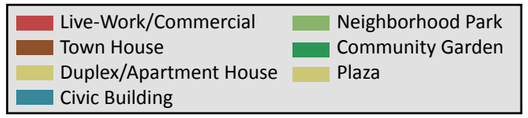


Figure 9.23: Community Center Land Use and Circulation

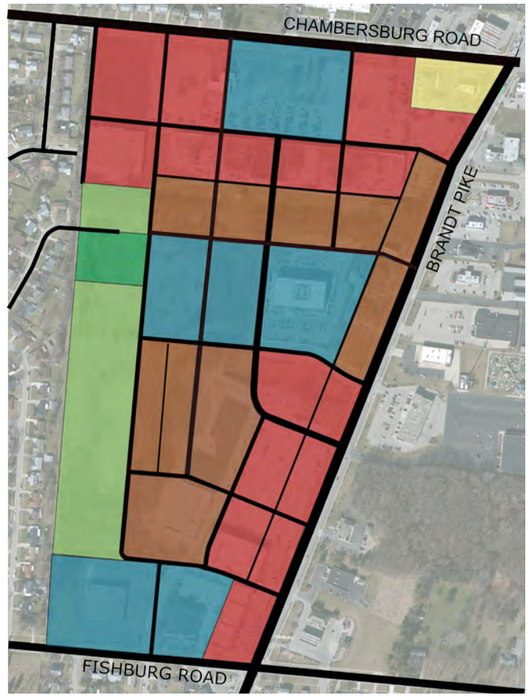
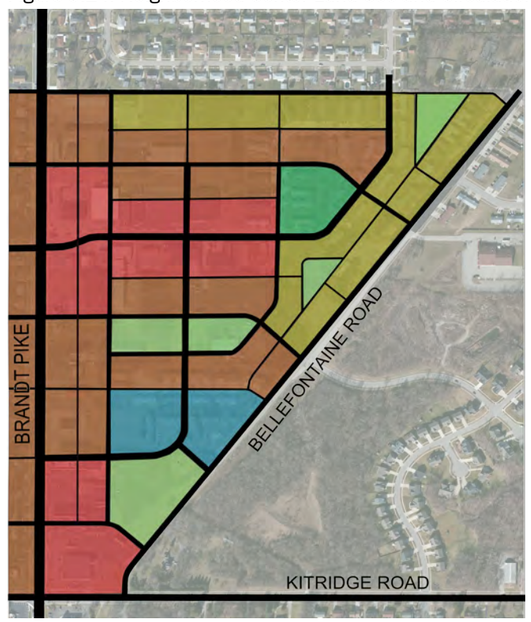


Figure 9.24: Neighborhood Center Land Use and Circulation



Neighborhood Center

Like the proposed Land Use and Circulation Plan for the Community Center area, the Neighborhood Center Land Use and Circulation Plan includes residential, office, retail, and institutional uses. Lots and buildings will be at a smaller and more neighborhood scale than those in the Community Center Plan.

As shown in Figure 9.24, mixed-use and single use commercial buildings will be concentrated in two locations: along Nebraska Avenue (and on either side of Nebraska Avenue fronting Brandt Pike) and at the intersection of Kitridge Road and Brandt Pike (red). Figure 9.25 illustrates how a smaller, one-story, building could be designed to accommodate single neighborhood scale uses.

Multifamily uses, in the form of townhomes and stacked flats, surround the mixed-use and single use commercial area off Nebraska Avenue. Apartment houses built to resemble larger single family residences and two family or duplex units are grouped toward the northeastern part of the site adjacent to the existing single family residential areas (tan). Additional land — shown in blue — is also reserved for institutional uses (assisted living/independent living) next to the commercial area. Four separate parks (green) are centrally located with respect to the residential areas with a fifth park located at the southern edge of the site. The fifth park is also within walking distance of the commercial area and the institutional site.

Tables 9.2-9.4 show six different Lot and Building types and three Park Types recommended for both the Community and Neighborhood Center areas. The tables describe each lot and building type and provide graphic examples of how buildings and parking can be placed and how they both relate to the street. Several park types and their lot configuration are also included.

Figure 9.25: Smaller Scale Neighborhood Commercial

Table 9.2: Building and Lot Types

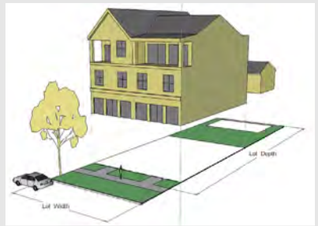
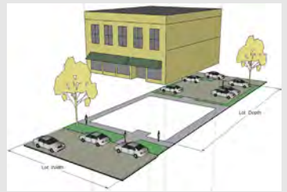
Building & Lot Type	Map Color	Description	Example Photo	Illustration
Live-Work		A lot located and designed to accommodate an attached or detached building with residential uses, commercial uses, or a combination of the two within individually occupied live-work units, all of which may occupy any story of the building.		
Town House		A lot located and designed to accommodate a residential building with common walls on both side lot lines and a private garden to the rear.		
Commercial Blockfront		A lot located and designed to accommodate offices or multiple dwellings on upper stories and various commercial uses on the ground story.		
Apartment House		A lot located and designed to accommodate a detached building which resembles a large house but which contains multiple dwellings above and beside each other.		
Civic Building		A lot located and designed to accommodate a building containing public or civic uses such as community services, day care, education, government, places of worship, or social services. A Civic Building is designed for a specific civic function. Civic Buildings should be sited in locations of particular importance, such as anchoring a major public space or terminating a vista.		
Duplex		A lot located and designed to accommodate a detached building with small side yards and a large front yard and containing two dwellings.		

Table 9.3: Park Types

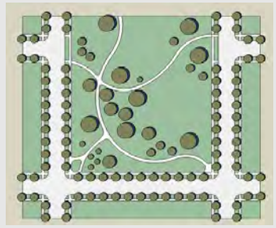
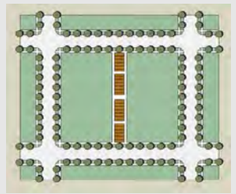
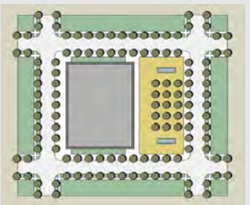
Park Type	Map Color	Description	Example Photo	Illustration
Neighborhood Park		A neighborhood park is a natural landscape consisting of open and wooded areas, typically furnished with paths, benches, and open shelters. Neighborhood parks are often irregularly shaped but may be linear in order to parallel creeks, canals, or other corridors.		
Community Garden		A community garden is a grouping of garden plots available to nearby residents for small-scale cultivation.		
Plaza		A plaza is a formal open space available for a civic and commercial uses and spatially defined by building frontages. Landscaping in a plaza consists primarily of pavement; trees and shrubs are optional.		

Table 9.4 outlines the street hierarchy used to organize site circulation. Five street types are listed, ranging from a main thoroughfare to an alley. The characteristics of each street type vary based on speed and expected interaction between modes.

Using this street hierarchy, a proposed grid of alleys, neighborhood streets, and several types of main roads is superimposed on the Community Center site. Figure 9.26 shows how a substantially smaller block configuration (300-400-foot length maximum) and increased road connectivity allows for improved pedestrian, bicycle, and vehicular circulation for the site and consolidates access to and from Chambersburg Road and Brandt Pike.

This street grid would accommodate local traffic, removing it from Brandt Pike and reducing turning movements and congestion along the Pike. While the grid would introduce new intersections on Brandt Pike, these additions would be offset by the removal and consolidation of private driveways and other curb cuts. Further, new intersections would be signalized, creating a more controlled environment, in contrast with the dangerous, unsiganlized conditions that currently exist at many access points on Brandt Pike.

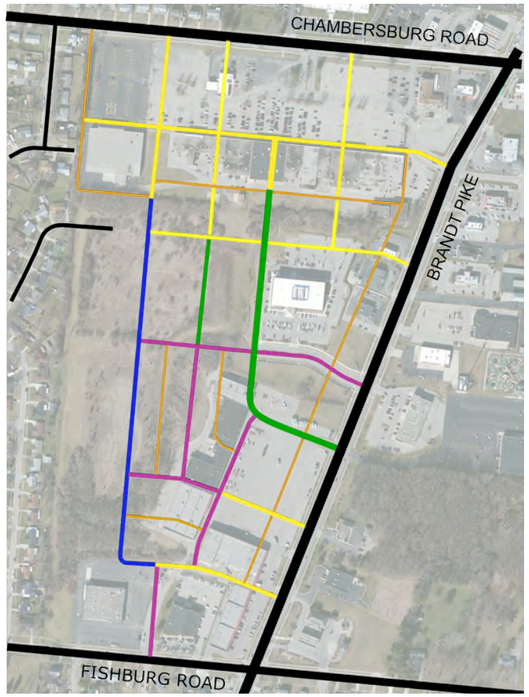
Community Center Illustrative Plan

The Community Center illustrative plan (Figures 9.27-9.30) demonstrates how to create a more compact, mixed-use, walkable, environment surrounding a

Table 9.4: Street Types

Street Type	Map Color	Description	Illustration
Type A		Drivers can expect travel similar to conventional street design, but with continued emphasis on pedestrian safety and comfort. Design speed is 25-30 mph.	
Type B		Drivers can expect to travel generally without delay at the design speed; street design supports safe pedestrian movement at the higher design speed. This movement type is appropriate for thoroughfares designed to traverse longer distances or connect to higher intensity locations. Design speed is 25-30 mph.	
Type C		Drivers must proceed slowly and with extreme care and must yield in order to pass a parked car or approaching vehicle (the functional equivalent of traffic calming). Design speed is 20 mph or less.	
Type D		Similar to the Type C street, the Type D Street has frontage on only one side with the other street side functioning as a open space or a park.	
Type E		Alley or lane entrances should generally align so as to provide ease of ingress for service vehicles, but internal deflections or variations in the alley/lane network are encouraged to prevent excessive or monotonous views of the rear of structures resulting from long stretches of alleys or lanes.	

Figure 9.26: Community Center Circulation



prominent civic use building, such as a library, a community center, or city administrative offices. The illustrative plan is shown at full development and takes the Community Land Use and Circulation diagram one step further, showing how buildings and parking can be strategically placed in a way that directly shapes the public realm.

In addition to illustrating how the mixed use, multifamily, and institutional buildings can front an interconnected network of streets and alleys, Figure 9.27 outlines the three major public uses on the site (in red): The civic use, the public plaza and the park and community garden. The civic use was located fronting Chambersburg Road as a result of participant feedback during the community workshop. This site also affixes the civic use to a more prominent location. Figure 9.28 shows how the building takes advantage of a slight increase in grade with its location near the street and how the view from the south is not only terminated by the civic use, but framed by the adjacent buildings. Open space is also provided on either side of the civic use building, and can be used for informal gathering and programmed events.

Another public space shown in Figure 9.29, is located at the far northeastern corner of the site adjacent to the Chambersburg Road and Brandt Pike intersection. This plaza space takes advantage of a slight drop in grade form the intersection and incorporates a tiered seating and assembly area. The site also provides space for a digital kiosk announcing public events and advertising for local businesses that could replace or incorporate the existing electronic billboard on the other side of Brandt Pike.

Figure 9.30 gives a close-up glimpse of how access can be provided on-site linking the adjacent residential neighborhood with a community garden, a small playground and a larger park area with pedestrian and bicycle access through the site separated from auto traffic.

Figures 9.31 and 9.32 give perspective views of the entire site and the civic use location, respectively. Figure 9.31 looks south and west across the site and shows how the plaza space could be designed as well as how buildings are set back slightly from Chambersburg Road to give the civic use building a visible presence from the intersection. Figure 9.32 looks north and west over the existing Huber Center at the proposed civic use building.

The redevelopment plan for the Community Center site recognizes the importance of phasing out existing properties that still have useful life as the site develops. Figure 9.33 shows how the existing Huber Center could be retained and still allow development of the civic use site and the mixed-use buildings fronting Chambersburg Road. The plaza space and the park could be acquired and developed in this phase as well. Phase II (Figure 9.34) shows the Huber Center replaced with two-story mixed use buildings and the access drive completed down to Brandt Pike. Phase III shows the site at full development after the proposed assisted/independent living facilities are built and the remaining mixed-use buildings fronting Brandt Pike are developed.

Figure 9.27: Community Center Illustrative Plan

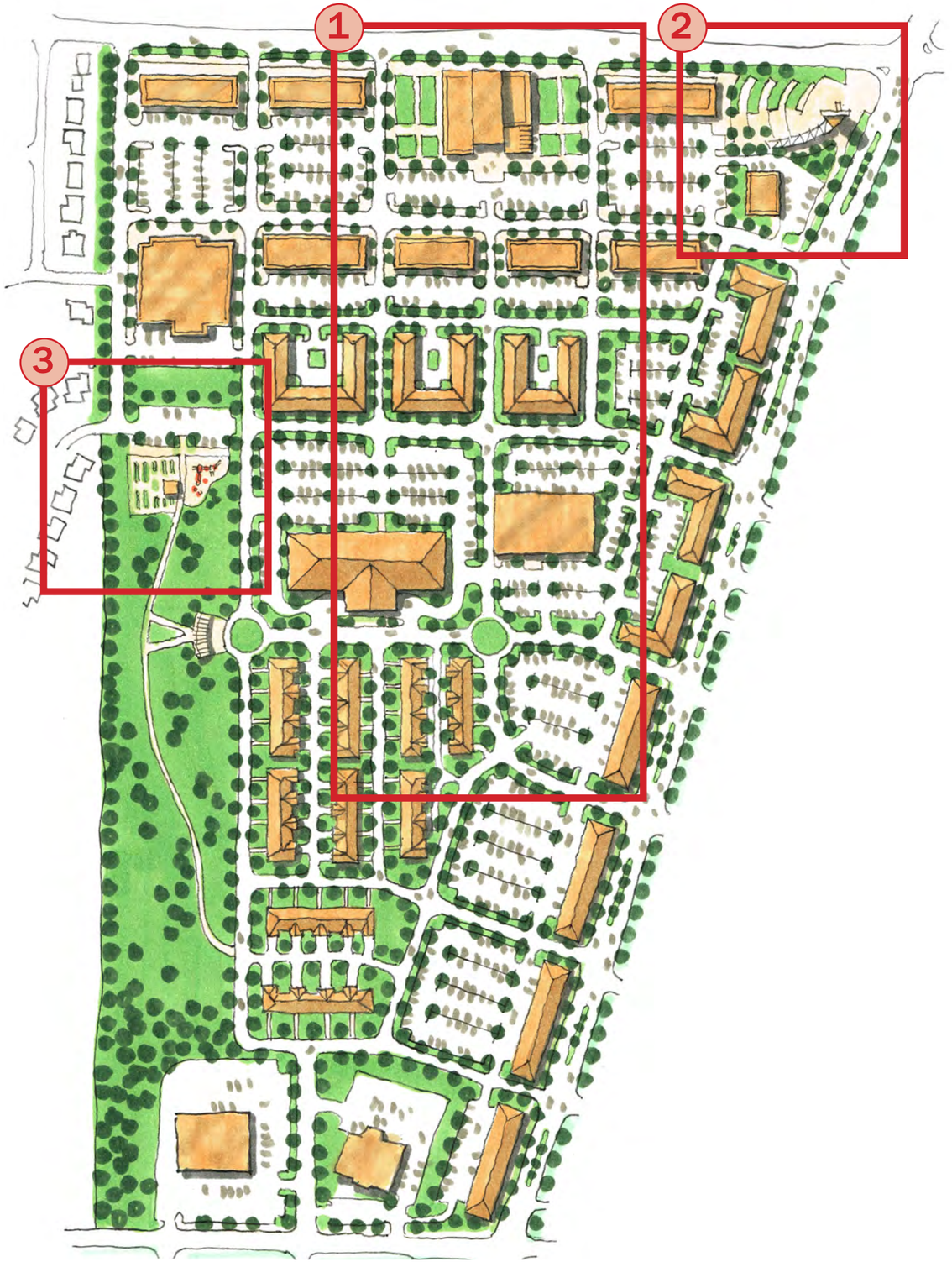


Figure 9.28: Terminated Vista

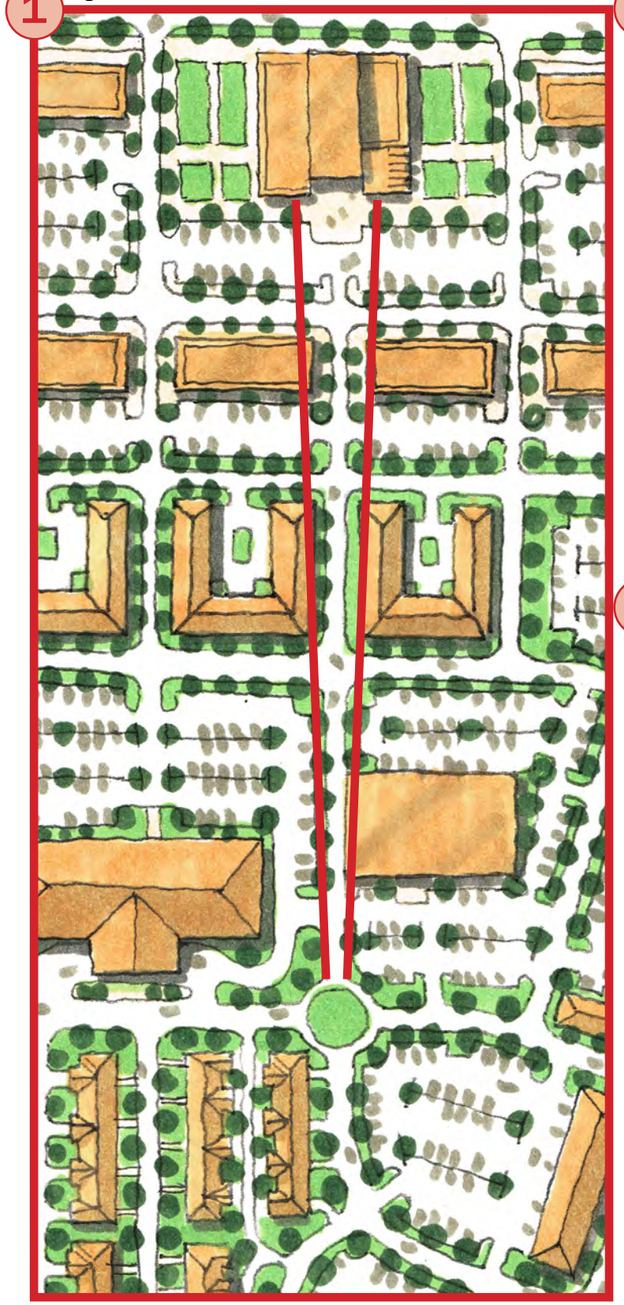


Figure 9.29: Public Plaza

Figure 9.30: Park and Community Garden

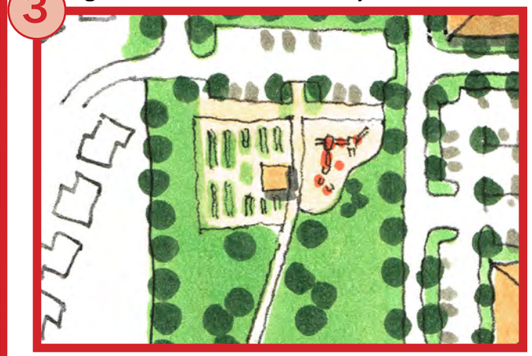


Figure 9.31: Birds eye view looking south and west from Chambersburg intersection, showing Huber Center.

Figure 9.32: Birds eye view looking south and west from Chambersburg intersection, Huber Center replaced with new development.

Figure 9.33: Civic use site, looking north and west from Huber Center.

Figure 9.34: Phase I

Figure 9.35: Phase II

Figure 9.36: Phase III

Commercial Market

All markets are dependent upon one another to varying degrees, and positive impacts on one market usually reverberate in other markets. This is known as the economic "multiplier effect" — the phenomenon where a change in an input causes one or more larger changes in output. For example, if a company decides to relocate a corporate office with several hundred office workers to Huber Heights, that will impact the market for other businesses and services near the new corporate office. This can happen in several different ways. The new corporate office will have a need for services such as maintenance and grounds keeping. The demand for these services can be met by local businesses, who in turn may need to hire more staff and buy more supplies, etc. These events can be modeled even further to quantify the change in demand for housing, the increase in demand for parking, and the impact on traffic. When changes in one market have a favorable impact on another market, the impact is classified as being a "positive externality." Conversely, when changes in a market have an unfavorable impact on another market, the impact is classified as being a "negative externality." The goal for a municipality or regulatory agency is to intervene where there are market inefficiencies, limit the number of negative externalities, and maximize the positive ones.

As mentioned in Chapter 7, the individual retail and service industry sectors have various strengths and weaknesses that ultimately manifest themselves in demand. Many factors, both related and unrelated, can impact that demand. The same can be said for the physical retail and office spaces themselves.

The Brandt Pike corridor has an oversupply of Class "C" commercial space. Commercial real estate is generally classified into one of three categories: Class "A", Class "B", or Class "C." The classification system combines subjective qualitative and quantitative factors to derive the classification of the individual buildings or spaces. Generally speaking, Class "A" represents the newest and highest quality buildings in the market. Class "A" spaces are well located, have good access, and are well managed. As a result, these spaces attract the highest quality tenants and also command the highest rents. Class "B" spaces are generally a little older, but still have good quality management and tenants, and could be renovated and returned to Class "A" status. Class "C" is the lowest classification and consists of older buildings that are often located in less desirable areas and are often in need of extensive renovation. The architecture is generally uninspired and the buildings contain outdated and obsolete infrastructure and technology. As a result, these spaces have the lowest rents, take the longest to lease, and have higher vacancy rates.

The retail strips along the Brandt Pike corridor are primarily Class "C" spaces, which has resulted in a glut of properties that all have similar characteristics. The buildings themselves are generally in need of repair inside and out. The individual retail bays or offices are inflexible and misconfigured, which results in a cascading array of inefficiencies. For example, a retailer may only need 1,000 square feet of space but there are only larger spaces available, so the retailer ends up occupying a larger space. This can result in poor aesthetics which do not attract and retain customers. It can also mean higher than necessary rents and utility bills.

The recommendations presented in the "Private Realm" section of this chapter can help alleviate this problem. Adhering to the recommendations that propose the nurturing of a "Community Center" and "Neighborhood Center" should result in the reduction of the supply of Class "C" spaces via demolition, renovations, and new construction. These improvements should have an immediate impact on rents and will attract a wider variety of tenants.

In the Chapter 7 market analysis of the various industry sectors, there was an emphasis on strategically clustering businesses together that have similar customer profiles. This arrangement happens organically in small towns and large cities. One example are towns that have a "District" that specializes in antiques or art. Several small businesses that are the same or similar can benefit from the scale that results in clustering. The resulting impact can increase the overall attractiveness of an area, resulting in a whole that is greater than the sum of its parts. A small business may specialize in one thing and have no interest in expanding, but a neighboring business could be catering to the same clientele while offering different goods. The customer of one business can be the customer of another, creating a "spillover" effect.

Huber Heights can coordinate with the business community and property owners to create or encourage clustering. Further, a specific area can be designated as a special District to attract similar businesses and services. This strategy is also a fantastic marketing tool. All businesses and services have a general "market area" from which the majority of their customers originate. If steps can be taken that result in a specific area becoming a "destination" that is capable of capturing consumers from outside

the market area, businesses will not be as dependent upon consumers that reside within the market area. The overarching goal is to foster a degree of resiliency so businesses can better withstand fluctuations in market conditions.

The market analysis identified some niche industry subsectors that are currently underserved in Huber Heights. One such subsector was Specialty Foods. This category includes places like ethnic grocery stores, bakeries, and spice shops. The overall attractiveness of individual businesses is compounded when several similar but different businesses are oriented in close proximity to one another — an example of the whole being greater than the sum of the parts. A consumer from outside the market area may feel the overall "attractiveness" of a cluster of similar businesses is strong enough to induce a trip to purchase goods, whereas he or she may have otherwise decided against, or delayed a single destination trip. The desire to patronize multiple businesses within a defined area increases when the businesses are closer together or simply walkable.

Similar to the previous recommendation, this strategy can be coordinated with the recommended changes to the public realm. For example, when executing the plan for the development of a "Community Center," the City, along with the Huber Heights Chamber of Commerce, can make explicit overtures to certain types of similar businesses in an attempt to develop a destination. The businesses could participate in a Special Improvement District in which they contribute to a fund that is used to pay for services and improvements that benefit the entire district or cluster of businesses.

Housing Market

Although the Brandt Pike Corridor was originally designed as an auto-centric commercial strip catering to those moving through the area, there are plenty of opportunities to create spaces along the corridor where people want to live, work and play. The complicated part is identifying those opportunities and forming a sound approach for moving forward. The City can employ several strategies, outlined below, as tools to revitalize the corridor. These tactics are not overnight solutions to the housing needs of Brandt Pike, but rather long term policy changes the City can make to further its goal of creating a thriving commercial and residential corridor.

Due to the high number of single-family home rentals concentrated within a half mile of the Brandt Pike Corridor, the City should develop a strategy to remove a number of them from the rental market. By eliminating scattered single-family rentals, the City can raise the demand for multi-family housing and concentrate new development in targeted areas. The first step in this process should be to identify and add any other rental properties not on the county's registry. The next step should be to identify any vacant properties along the corridor and add them to the pool of potential redevelopment sites.

By eliminating scattered single-family rentals, the City can raise the demand for multi-family housing and concentrate new development in targeted areas.

After a database of homes not currently owner-occupied is assembled and owners of each property identified, the homes should be evaluated and categorized based on their condition. Once this is done, the City can identify clusters of homes that should be targeted for development and work with owners to acquire the properties. The Montgomery County Land Bank provides several programs to help cities turn distressed properties into marketable assets, including their land banking program and loans for rehabilitating distressed properties.

The City should not simply plan for the development of multi-family housing that serves all ages and incomes, but focus on the growing need for affordable family and affordable senior housing. Any new housing development should meet the needs of the current residents, but also keep in mind the kinds of people the City wants to attract. Huber Heights is projected to see a rise in the income of seniors and a drop in higher earning young professionals. If business along the corridor is going to thrive, it needs to become a place where young professionals want to be.

Any new housing development should meet the needs of the current residents, but also keep in mind the kinds of people the City wants to attract.

Areas targeted for development, such as Huber Center, should be regulated using a form-based coding process rather than dictating the type of use through traditional zoning. Arlington County, VA employed this process in 2012 as a way to encourage redevelopment along a distressed commercial corridor. Recognizing the need for more affordable housing, the county requires that 20 to 35 percent of net new units developed along the corridor remain affordable to households earning less than 60 percent of the area median household income. To incentivize development, the county also created a fund that developers could use towards infrastructure related items as long as they meet the affordable housing requirement. Because of the efforts made by the county to incentivize affordable housing along the corridor, 439 new affordable housing units were added from 2012 to 2016 and 499 more were preserved in existing buildings. The county also added about 2,000 more market-rate units in addition to one million square feet of new commercial space.

Aside from demand for traditional senior housing, there is also a need for senior living facilities that cater to seniors in need of all levels of care. Right now, many seniors are forced to age in their homes, which is oftentimes not an ideal situation. The City should pursue the development of a senior living campus, most logically adjacent to the Good Samaritan Health Care Facility just south of the intersection of Brandt Pike and Chambersburg Road. Aside from being located within walking distance to health and wellness facilities, there are also several other amenities close by, such as the Huber Heights Senior Center.

Chapter 10: Implementation

This chapter distills the recommendations and concepts from Chapter 9 into a list of strategies and action items for the City to pursue as Brandt Pike is redeveloped. Strategies are divided into three categories:

1. Public Realm (Transportation Improvements)
2. Private Realm (Built Environment Improvements)
3. Commercial and Housing Markets

A fourth category, regulatory reform, is addressed in Appendix III. Responsible parties, locations, timelines, and phasing are listed for each item. These timings are suggestions only, and will likely need to be adjusted based on physical, political, financial, and other factors as the Pike redevelops. Refer to Table 10.1 for a more detailed timeline for each action item.

Public Realm (Transportation Improvements)

Strategy I: Improve roadway geometry at major signalized intersections.

With pedestrian islands and reduced corner radii installed at major signalized intersections, crosswalks could be realigned to form regular, right-angled lines that are easier for pedestrians to navigate and create a more predictable environment. These improvements would also increase pedestrian connectivity between land uses on opposite sides of the road.

Parties responsible: City of Huber Heights

Action items

1.1 Reduced corner radii
Location: Major signalized intersections
Timeline/Phasing:
Phase I (Chambersburg): Near-term, Year 2
Phase II (Taylorsville): Near-term, Year 3
Phase III (Fishburg): Near-term, Year 4

1.2 Pedestrian islands
Location: Major signalized intersections
Timeline/Phasing:
Phase I (Chambersburg): Near-term, Year 2
Phase II (Taylorsville): Near-term, Year 3
Phase III (Fishburg): Near-term, Year 4

Strategy II: Adopt and enforce access management standards to reduce curb cuts and improve circulation.

In addition to improving traffic flow and reducing conflict points by channelizing turning traffic, restricting access with a median and consolidating curb cuts would reduce the multiple threats that pedestrians currently face when crossing a driveway entrance or exit.

Parties responsible: City of Huber Heights

Action items

2.1 Consolidate curb cuts
Location: Adjacent properties on Brandt Pike
Timeline/Phasing:
Phase I (Adopt standards): Near-term, Year 2
Phase II (Enforce standards): Ongoing

2.2 Install medians
Location: Commercial Only: Brandt Pike from Kitridge Road to 5210 Brandt Pike, and from Fishburg Road to Leyden Lane
Commercial and Residential: Kitridge Road to Taylorsville Road
Timeline/Phasing:
Phase I (Commercial): Near-term, Year 4
Phase II (Residential): Mid-term, Year 6

Strategy III: Expand and improve pedestrian facilities.

Huber Heights can build upon Brandt Pike's robust sidewalk network to create a more walkable environment along the roadway. Improvements at conflict points, such as intersections and driveways, and encouraging walkable development that connects to the sidewalk network, are the focus of this strategy. Strategies I and II will supplement these improvements.

Parties responsible: City of Huber Heights, Developers

Action items

3.1 Pedestrian signal improvements
Location: All signalized intersections
Timeline/Phasing: Immediate

3.2 High-visibility crosswalks
Location: All intersections and midblock crossings
Timeline/Phasing:
Phase I (All signalized intersections): Near-term, Year 2
Phase II (All unsignalized intersections): Near-term, Year 3
Phase III (Midblock crossings): Near/Mid-term

3.3 Midblock crossings
Location: Accessible to pedestrian-generating land uses, and on long blocks between signalized intersections
Timeline/Phasing: Near/mid-term

3.4 Connect to private realm destinations
Location: Pedestrian-generating land uses
Timeline/Phasing: Ongoing, in conjunction with redevelopment

Strategy IV: Introduce bicycle facilities on Brandt Pike.

This action item should only be pursued once improvements that reduce potential conflicts between motorists and other users are complete (Strategies I — III). Bicycle facilities would likely see more use once more bike-friendly destinations are established on the Pike.

Parties responsible: City of Huber Heights

Action items

4.1 Two-way cycle track
Location: Adjacent to southbound travel lanes, between Fishburg Road and Longford Road
Timeline/Phasing:
Phase I (From Fishburg Road to Chambersburg Road): Mid-term
Phase II (From Chambersburg Road to Longford Road): Mid-term

Strategy V: Aesthetics and traffic calming

This strategy will work in conjunction with Strategies I — IV, complementing pedestrian infrastructure improvements and coordinating other strategies to achieve a traffic calming effect.

Parties responsible: City of Huber Heights

Action items

5.1 Road diet
Location: In conjunction with median and cycle track placement
Timeline/Phasing: Near/Mid-term

5.2 Streetscape aesthetics
Location: Entire corridor
Timeline/Phasing: Near/Mid-term

Strategy VI: Improve transit stops

While the City of Huber Heights cannot directly implement this strategy, other strategies within its control — such as redevelopment efforts and pedestrian improvements — can help increase transit ridership, justifying a demand for enhanced facilities.

Parties responsible: Greater Dayton Regional Transit Authority, City of Huber Heights

Action items

6.1 Sign placement
Location: All RTA stops in the study area
Timeline/Phasing: Immediate

6.2 Shelter enhancements
Location: High ridership RTA stops in the study area
Timeline/Phasing: Mid-term

Private Realm (Built Environment Improvements)

Strategy I: Place recommended projects on the City's list for capital improvements or establish a formal Capital Improvements Program (CIP).

Strategies in the Public Realm (Transportation Improvements) section should be added to the City's list of improvements to Brandt Pike and portions of Chambersburg Road. A number of improvements to the existing roadway network can be made as part of already planned roadway improvements with minimal additional investment. Or, in concert with the 2011 Comprehensive Plan recommendations, establish a formal CIP. According to the Plan, "CIPs advance planning and scheduling of community facilities to help avoid costly mistakes."

Strategy II: Strategy II: Involve the Community Improvement Corporation (CIC).

Even though a CIC is typically established for an entire community, it can focus its initial efforts on areas such as managing Brandt Pike's revitalization. The CIC could work closely as a private, non-profit organization with the City in a private-public partnership.

Strategy III: Set up a Tax Increment Financing program for the Community Center site to help finance public improvements.

Tax Increment Financing (TIF) is an economic development mechanism available to local governments in Ohio to finance public infrastructure improvements and, in certain circumstances, residential rehabilitation. The local government funds the infrastructure improvements by issuing bonds to investors and paying them back with the proceeds from the increased property tax revenue collected from property owners within the TIF district. Only those public infrastructure improvements directly serving the increased demand arising from the real property improvements to the parcel(s) or an Incentive District are eligible for TIF financing. TIF districts generally last for a 20 to 30-year term.

Because TIF projects are financed from the sale of bonds, the city does not have to raise taxes or divert resources from other city services in order to pay for the improvements. A well-conceived TIF district has the ability to spur development in a distressed area and raise property values. It is also a good mechanism to jump-start a specific private development project that may have not have been achievable without public financing.

Like any investment, however, a TIF district can be a major gamble if it is not well planned and thoughtfully structured. If property values do not increase enough to in order to repay the investors who purchased the bonds, the city is responsible for raising the money to pay off the debt.

There are several opportunities along the Brandt Pike Corridor to utilize TIF districts as a mechanism for revitalization. For instance, a TIF district established along Brandt Pike between Chambersburg Road and Fishburg Road could pay for roadway and sidewalk improvements and the consolidation of curb cuts. As traffic flow and walkability in the area improve as a result of the public investment, private businesses along this section of Brandt Pike should see an increase in customers, which should act as a catalyst for private development and ultimately raise property values.

TIF funds could also be used to partly finance the development of the Community Center site between Chambersburg and Fishburg or the Neighborhood Center site between Nebraska and Kitridge. TIF funds could be used for roadway and sidewalk improvements, utility improvements and the development of public parks or plaza. TIF funds could be used to acquire land for a civic use anchor along the Pike.

Strategy IV: Revise the City's Planning and Zoning Code to establish an overlay district regulating development and redevelopment along Brandt Pike.

Overlay zoning is a regulatory tool that creates a special zoning district, placed over an existing base zone(s), which identifies provisions in addition to those in the underlying base zone. The overlay district can share common boundaries with the base zone or cut across base zone boundaries. It can also be divided into sub districts regulating development or redevelopment in the Community Center, Neighborhood Center, and Neighborhood Segment zones. These new development regulations should:

- *Guide physical changes more effectively than current zoning codes, in the direction the community intends (see Appendix 2, Zoning Code Assessment);*
- *Streamline the development process by providing clear and comprehensive instructions to developers and their designers; and*
- *Provide the City with tools that are user-friendly, engage prospective investors, and answer property owners' questions.*

Parties responsible: City of Huber Heights

Action items

4.1 Create Overlay district with form-based standards.
Location: Entire corridor
Timeline/Phasing: Immediate

4.2 Incorporate overlay district into Planning and Zoning Code.
Location: Entire corridor
Timeline/Phasing: Immediate

Strategy V: Initiate first phase of Community Center Plan.

One of the primary initiatives in the first phase of the Community Center Plan is to obtain a site for locating a new civic use site along the Pike. Whether or not the facility is located on the site proposed in the Community Center Illustrative Plan (Chapter 9) is not as important as locating the facility somewhere within the Community Center. A civic use could serve as an excellent catalyst for future improvements and provide a civic use that can continue to serve as an integral, centrally located part of the community. Once the civic use building is under construction, the exiting shopping center can be renovated and the proposed mixed-use buildings constructed. Property for the community park and the plaza can then be secured.

Parties responsible: City of Huber Heights

Action items

5.1 Develop public/private partnership to secure site for civic use development.
Location: Community Center
Timeline/Phasing: Immediate

5.2 Work with Huber Center Owner to secure permits and approvals for shopping center renovation.
Location: Community Center
Timeline/Phasing: Immediate

5.3 In cooperation with the CIC, work with Huber Center owner to initiate development of mixed use buildings, and secure property for open space area and site for public plaza construction.
Location: Community Center
Timeline/Phasing: Near-term

5.4 Relocate exiting businesses on plaza site to new adjacent mixed-use buildings.
Location: Community Center
Timeline/Phasing: Near-term

Strategy VI: Coordinate with regional entities, such as the Miami Valley Regional Planning Commission (MVRPC) and the Dayton Regional Transit Authority (RTA).

The Miami Valley Regional Planning Commission is not only a valuable source of information about the region, but it provides valuable direction form the regional perspective and is the region's forum for prioritizing transportation projects. The Dayton Regional Transit Authority has been serving Huber Heights and Brandt Pike for a long time and any efforts to increase density and enhance walkability along the Pike will only improve ridership, which in turn could spur RTA investment in transit facilities along the corridor.

Parties responsible: City of Huber Heights, Miami Valley Regional Planning Commission, Greater Dayton Regional Transit Authority

Action items

6.1 Work with the MVRPC in obtaining assistance from the Complete Street and the Share the Road programs.
Location: N/A
Timeline/Phasing: Near-term

6.2 Make RTA aware of City plans to revitalize Brandt Pike and explore ways that ridership can be increased through planned

pedestrian and bicycle improvements along the corridor.
Location: N/A
Timeline/Phasing: Near-term

Strategy VII: Collaborate among City departments in implementing the Revitalization Plan.

Establish an interdepartmental "core team" that includes senior staff from the City Manager's Office, Economic Development, Engineering, Finance, Planning and Zoning, Parks and Recreation, and Public Works, amongst others.

Parties responsible: City of Huber Heights

Action items

7.1 Select Core Team, organize, and assign responsibilities.
Location: N/A
Timeline/Phasing: Immediate

7.2 Hold regular meetings to coordinate Community Center development and discuss progress.
Location: N/A
Timeline/Phasing: Immediate

Strategy VIII: Initiate Second phase of Community Center Plan.

Most of the second phase of the Community Center Plan will focus on preparing the site to accommodate future multifamily development. This means shifting the primary access from Good Samaritan Way to a new road directly aligned with the Poelking Bowling Center and linked to the new civic use site. Huber Center can then be replaced with additional mixed use buildings if the market warrants. Once the site circulation network is in place, the multi-family sites can then be marketed for development.

Parties responsible: City of Huber Heights, CDC, Property Owners, and Stakeholders

Action items

8.1 Realign primary access off Brandt from Good Samaritan Way to directly align with the Poelking Bowling Center access.
Location: Community Center
Timeline/Phasing: Mid-Term

8.2 Develop and market multifamily properties in the Community Center.
Location: Community Center
Timeline/Phasing: Mid-Term

Strategy IX: Create detailed redevelopment plan for Brandt and Kitridge Neighborhood Center.

Initiate a process similar to "Discover Brandt Pike" to involve residents and stakeholders in planning for the area, helping to secure by-in from the community.

Parties responsible: City of Huber Heights, Property Owners, Residents, and Stakeholders

Action items

9.1 Develop slogan and logo for planning effort.
Location: N/A
Timeline/Phasing: Mid-Term

9.2 Assemble Steering Committee and develop public involvement plan.
Location: N/A
Timeline/Phasing: Mid-Term

Strategy X: Initiate third phase of the Community Center Plan.

The Community Center site is an excellent location for senior living. The proximity of health care services, commercial uses, and a community garden within walking distance (for those with mobility) and a more comprehensive facility for dependent care are just two types of housing possible within the site. Extending Good Samaritan Way to terminate at and connect with the north-south road east of the park will provide another access to a public facility.

Parties responsible: City of Huber Heights, CDC, Property Owners, Equity Inc., Premier Health Partners

Action items

10.1 Extend Good Samaritan Way to connect with north-south road east of park.
Location: Community Center
Timeline/Phasing: Mid-Term

10.2 Complete development of the Community Park to include community garden and pedestrian pathways.
Location: Community Center
Timeline/Phasing: Mid-Term

10.3 Work with Premiere Health to develop a senior living/health and wellness campus.
Location: Community Center
Timeline/Phasing: Mid-Term

10.4 Encourage developers to build multi-family housing marketed to seniors age 55 and over.
Location: Community Center
Timeline/Phasing: Mid-Term

Strategy XI: Create detailed redevelopment plan for Brandt and Taylorsville Neighborhood Center.

Initiate a process similar to "Discover Brandt Pike" to involve residents and stakeholders in planning for the area, helping to secure by-in from the community.

Parties responsible: City of Huber Heights, Property Owners, Residents, and Stakeholders

Action items

11.1 Develop slogan and logo for planning effort.
Location: N/A
Timeline/Phasing: Long-Term

11.2 Assemble Steering Committee and develop public involvement plan.
Location: N/A
Timeline/Phasing: Long-Term

Commercial and Housing Markets

Strategy I: Identify single-family home rentals within one mile of the corridor and return them to owner-occupied.

Due to the high number of single-family home rentals concentrated within one mile of the Brandt Pike Corridor, the City should develop a strategy to return a number of them to the owner-occupied market over a 10 to 15-year period. By removing scattered single-family rentals, the City can increase the demand for new multifamily housing and concentrate development in targeted areas along the corridor. In terms of funding sources, the Montgomery County Land Bank provides several programs to help cities turn distressed properties into marketable assets, including their land banking program and loans for rehabbing distressed properties.

Parties responsible: City of Huber Heights, Montgomery County

Action items

1.1 Identify all single-family home rentals along the corridor and categorize them based on condition and occupancy status.
Location: Entire Corridor
Timeline/Phasing: Immediate

1.2 Work with landlords to determine their needs and any future plans they have for their properties.
Location: Entire Corridor
Timeline/Phasing: Near-term

1.3 Identify clusters of homes that have the most redevelopment potential.
Location: Entire Corridor
Timeline/Phasing: Mid-term

Strategy II: Incentivize the development of affordable housing.

Areas targeted for development, such as Huber Center, should be regulated using a form-based coding process rather than dictating the type of use through traditional zoning. Arlington County, VA employed this process in 2012 to encourage redevelopment along a distressed commercial corridor. Recognizing the need for more affordable housing, the county requires that 20 to 35 percent of net new units developed along the corridor remain affordable to households earning less than 60 percent of the area median household income. To incentivize development, the county also created a fund that developers could use towards infrastructure related items if they meet the affordable housing requirement. Because of the efforts made by the county to incentivize affordable housing along the corridor, 439 new affordable housing units were added from 2012 to 2016 and 499

more were preserved in existing buildings. The county also added about 2,000 more market-rate units in addition to one million square feet of new commercial space.

Parties responsible: City of Huber Heights, Ohio Housing Finance Agency

Action items

2.1 Create a zoning overlay district that incentivizes the development of new affordable housing.
Location: Entire Corridor
Timeline/Phasing: Near-term

Strategy III: Redevelop the Huber Center as a mixed-use town center.

This strategy will work in coordination with Private Realm Strategy V: Initiate first phase of Community Center Plan. The Huber Center occupies the most desirable space along the entire Brandt Pike corridor. The building itself is structurally sound and can be integrated into a larger, mixed-use project. Incorporate multifamily housing into the project to provide for a more active space. Commercial businesses traditionally follow their customers, and increased density in a concentrated area will most likely lead to more commercial development. More "eyes on the street" generally creates a safer space where both residents and visitors want to be. Dictating the form of a space over the function opens the door to a wide variety of investors and development opportunities.

Parties responsible: City of Huber Heights, Columbia Building Systems

Action items

3.1 Identify funding mechanisms that incentivize large-scale, mixed-use development.
Location: Brandt Pike from Fishburg Road to Chambersburg Road
Timeline/Phasing: Mid-term

Strategy IV: Reduce the overall supply of "Class C" retail and office space along the corridor.

One of the imbalances in the retail market along the corridor is the overabundance of substandard retail units. Demolishing, rehabilitating and/or repurposing some of these units would increase the demand of the remaining stock as well as increase its value.

Parties responsible: City of Huber Heights, Montgomery County Land Bank

Action items

4.1 Work with owners of substandard properties on strategies to either improve or remove their properties from the market.
Location: Entire corridor
Timeline/Phasing: Immediate

4.2 Implement a facade improvement program for commercial property owners
Location: Entire corridor
Timeline/Phasing: Immediate

Strategy V: Increase the daytime population of Huber Heights.

The lack of daytime workers is impacting the tax base of Huber Heights in several ways. More daytime workers would help provide additional revenue to area retailers.

Parties responsible: City of Huber Heights

Action items

5.1 Actively recruit employers using incentives as necessary.
Location: Entire corridor
Timeline/Phasing: Immediate

Table 10.1 summarizes the above strategies and action items. For brevity and clarity, some of the action item descriptions are paraphrased.

Table 10.1: Redevelopment Strategy Timeline

Category/Strategy/Action Item		Year														
		Immediate	Near-Term			Mid-Term					Long-Term					
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Public Realm (Transportation Improvements)																
I	Improve Roadway Geometry															
1.1	Reduced corner radii															
1.2	Pedestrian islands															
II	Access Management Standards															
2.1	Consolidate curb cuts															
2.2	Install medians															
III	Expand and improve pedestrian facilities															
3.1	Pedestrian signal improvements															
3.2	High-visibility crosswalks															
3.3	Midblock crossings															
3.4	Connect to private realm destinations															
IV	Introduce Bicycle Facilities															
4.1	Two-way cycle track															
V	Aesthetics and Traffic Calming															
5.1	Road diet															
5.2	Streetscape aesthetics															
VI	Improve transit stops															
6.1	Sign placement															
6.2	Shelter enhancements															
Private Realm (Built Environment Improvements)																
I	Establish/revise Capital Improvements Program															
II	Establish a Community Development Program (CDC)															
III	Set up a TIF for Community Center															
IV	Revise Zoning Code to establish overlay district along Brandt Pike															
4.1	Create Overlay district with form-based standards.															
4.2	Incorporate overlay district into Planning and Zoning Code.															
V	Initiate first phase of Community Center Plan															
5.1	Develop PPP to secure site for civic use development															
5.2	Work with Huber Center Owner to secure permits and approvals for shopping center renovation.															
5.3	Work with CDC and Huber Center owner to initiate development of mixed use buildings, and open space plaza															

Table 10.1, continued

Category/Strategy/Action Item		Year														
		Immediate	Near-Term			Mid-Term					Long-Term					
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
5.4	Relocate exiting businesses on plaza site to adjacent mixed-use buildings															
VI	Coordinate with other regional entities (MVRPC and RTA)															
6.1	Work with MVRPC to obtain Complete Street/Share the Road program assistance															
6.2	Make RTA aware of City plans to revitalize Brandt Pike															
VII	Collaborate among City departments in implementing the Revitalization Plan															
7.1	Select Core Team, organize, and assign responsibilities															
7.2	Hold regular meetings to coordinate Community Center development															
VIII	Initiate second phase of Community Center Plan															
8.1	Realign primary access off Brandt Pike															
8.2	Develop and market multifamily properties in the Community Center															
IX	Create detailed redevelopment plan for Brandt and Kitridge Neighborhood Center.															
9.1	Develop slogan and logo for planning effort															
9.2	Assemble Steering Committee and develop public involvement plan															
X	Initiate third phase of Community Center Plan															
10.1	Extend Good Samaritan Way to connect with north-south road east of park															
10.2	Complete development of the Community Park															
10.3	Work with Premiere Health to develop a senior living/health and wellness campus															
10.4	Encourage developers to build multi-family housing for seniors age 55 and over															
XII	Create detailed redevelopment plan for Brandt and Taylorsville Neighborhood Center															
11.1	Develop slogan and logo for planning effort															
11.2	Assemble Steering Committee and develop public involvement plan															
Commercial and Housing Markets																
I	Identify single-family home rentals within one mile of the corridor and return them to owner-occupied															

Table 10.1, continued

Category/Strategy/Action Item		Year														
		Immediate	Near-Term			Mid-Term					Long-Term					
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1.1	Identify and categorize single-family home rentals based on condition and occupancy status.															
1.2	Work with landlords to determine their needs and any future plans they have for their properties.															
1.3	Identify clusters of homes that have the most redevelopment potential															
II	Incentivize the development of affordable housing															
2.1	Create a zoning overlay district to incentivize affordable housing development															
III	Redevelop the Huber Center as a mixed-use town center															
3.1	Identify funding mechanisms that incentivize large-scale, mixed-use development															
IV	Reduce the overall supply of “Class C” retail and office space along the corridor															
4.1	Work with owners of substandard properties to improve/remove their properties from the market															
4.2	Implement a facade improvement program for commercial property owners															
V	Increase the daytime population of Huber Heights															
5.1	Actively recruit employers using incentives as necessary.															

Appendix I: Figures and Tables

List of Figures

Fig. #	Title/Caption	Page #
1.1	Brandt Pike Corridor, regional context	1
1.2	Dayton Metro Library Huber Heights Branch	2
1.3	Discover Brandt Pike information on electronic billboard	2
2.1	Historic map of Wayne Township	3
2.2	Typical brick homes in Huber Heights	4
2.3	Typical brick homes in Huber Heights	4
2.4	Typical road conditions in the Dayton area, late 1800's	4
2.5	Typical road conditions in the Dayton area, late 1800's	4
2.6	A 1923 map of Dayton's main roads	5
2.7	A historic map of Dayton's proposed expressway program	6
3.1	Huber Heights historic population (1990-2015)	7
3.2	Population Density (by Traffic Analysis Zone)	7
3.3	Population Density: Study Area	8
3.4	Job Density (by Traffic Analysis Zone)	9
3.5	Huber Heights commute characteristics	9
3.6	Minority Population — Percent (by 2010 Census Block)	10
3.7	Population 65 Years and Over	11
3.8	Huber Heights Population by Age (2015) — Percent	11
3.9	Huber Heights Income by Household (2015) — Percent	12
3.10	Median Household Income (by 2011 Census Block)	12
4.1	Deciduous forest near the southern end of the study area	13
4.2	Some undeveloped land in the study area is suitable for agricultural use	13
4.3	Residential parts of Brandt Pike have a robust tree canopy	13
4.4	A community garden takes advantage of undeveloped land behind Huber Center	13
4.5	Soil Drainage	14
4.6	Topography	15
4.7	Brandt Pike Elevation Gain	15
4.8	Slope	16
4.9	Water Features	17
4.10	Impervious Surface Area	18
4.11	Impervious Surface Area — Percent	18
4.12	Ground Water Pollution Potential	19
4.13	Land Cover	20
4.14	Prime Farmland	21
4.15	Environmental Suitability Measure	22
5.1	Land Use in the Study Area — Percent	23
5.2	Land Uses	24
5.3	Building Appearance	25
5.4	Civic Land Uses	26
5.5	Utilities	27
5.6	Urban to Rural Transect	28
5.7	Brandt Pike Sub-Urban Zone Example	28
5.8	Brandt Pike General Urban Zone Example	28
5.9	Brandt Pike Public and Private Realm	29
5.10	Brown Street Public and Private Realm	29
6.1	Skewed intersections create longer crossing distances	32
6.2	Skewed intersections create longer crossing distances	32
6.3	Traffic Volumes	33
6.4	Traffic on Brandt Pike	33
6.5	Traffic on Brandt Pike	33
6.6	Brandt Pike historical traffic count data	34
6.7	Public Transportation	35
6.8	Poorly placed bus stop sign	35
6.9	Bus stop with bench	35
6.10	Bus stop with shelter	36
6.11	RTA bus on Brandt Pike.	36
6.12	Truck traffic on Brandt Pike	36
6.13	Pedestrian Environment	37
6.14	Square miles covered within walking distances of Brandt Pike	37
6.15	Landscaped sidewalk	37
6.16	Street trees near the intersection with Fishburg Road	38
6.17	Poorly placed pedestrian pushbutton	38
6.18-6.31	Walk Audit Photos	39-42
6.32	Bicycle Facilities	43
6.33	A bicyclist using the crosswalk at Chambersburg Road	44
6.34	Curb cuts near Kitridge Road	44
6.35	Curb cuts as percent of road segment length	44
6.36	Curb Cuts between Kitridge and Fishburg Roads	45
6.37	Curb Cuts between Fishburg and Longford Roads	45
6.38	Curb Cuts between Longford Road and Study Area boundary	45
6.39	Frequent curb cuts create a segmented, hazardous pedestrian environment	46
6.40	Access road for homes north of Taylorsville Road on Brandt Pike	46
6.41	Parking Estimates	47
6.42	Huber Center parking lot measured in football fields	48
6.43	Huber Center parking lot	48
6.44	Marian Shopping Center	48
7.1	Commercial Land Use	50
7.2	Family Video	51
7.3	Walgreens	51
7.4	CVS	51
7.5	Lofino's Plaza	51
7.6	Goodwill South	52
7.7	Goodwill North	52
7.8	Shoppes at Huber Heights	52
7.9	Marian Center	53
7.10	Huber Center parking lot	53
7.11	Gem City parking lot	53
7.12	Lofino's Plaza	53
7.13	Temporary signage	54
7.14	Poorly maintained storefront	54
7.15	Left turn out of Brandt Tower Plaza	55
7.16	Seasonality	55
7.17	O'Reilly Auto Parts	55
7.18	Autozone	55
7.19	Advance Auto Parts	55
7.20	Lee's Chicken	56
7.21	KFC	56
7.22	Marco's Pizza	56
7.23	Rapid Fired Pizza	56
7.24	Deroma's	56
7.25	Good Samaritan Health Center	57
7.26	Urgent Care	57
7.27	Bowling Alley	57
7.28	Fixery Jewelers	57
7.29	Commercial Zones	59
7.30	Taylorsville Vacancies	60
7.31	Taylorsville Commercial Zone Five Minute Drive Time	61
7.32	Chambersburg Vacancies	63
7.33	Chambersburg Commercial Zone Five Minute Drive Time	65
7.34	Nebraska Vacancies	67
7.35	Nebraska Commercial Zone Five Minute Drive Time	69
7.36	Aldi grocery store	71
7.37	United Furniture	71
7.38	O'Reilly Auto Parts	73
7.39	Goodwill	73
7.40	Wayne's Sporting Goods	75
7.41	Taco Bell	75
7.42	Speedway	76
7.43	Fixery Jewelers	76
7.44	Pet Valu	77
7.45	Lucky Auto Sales	77
7.46	CVS	79
7.47	D&S Appliances	79
7.48	Absolute Small Engine	79
7.49	6443-6455 Chambersburg Road	82
7.50	Brandt Tower	83
7.51	Gem City	83
7.52	Huber Center	84
7.53	Marian Center	84
7.54	Shoppes of Huber Heights	85
7.55	Huber Heights Plaza	85
7.56	Housing Market Area	87
7.57	Huber Heights Population by Age	89
7.58	Housing Market Area Population by Age	90
7.59	Huber Heights Household by Income (2010 to 2021)	91
7.60	Housing Market Area by Income (2010 to 2021)	91

7.61 Percentage of Renter Households Paying 50 percent or More of Their Income Toward Rent 92
7.62 Apartment Rental Prices per Square Foot 93
7.63 Single Family Home Rentals 95
7.64 Median List Price 98
9.1 Pedestrian Island 109
9.2 Reduced Corner Radii 110
9.3 Pedestrian islands and reduced corner radii would make it easier to cross the Chambersburg intersection 110
9.4 All of the businesses in this shopping center are served by one driveway on the main road 111
9.5 Median 112
9.6 Accessible Pedestrian Signal pushbutton 113
9.7 High-Visibility Crosswalk 114
9.8 Advance Yield Sign 114
9.9 Rectangular Rapid Flashing Beacon 115
9.10 Crosswalk Lighting 115
9.11 Two-way cycle track 116
9.12 A two-way cycle track could serve new development on the west side of Brandt Pike 116
9.13 Alternate Commuter Routes 117
9.14 A landscaped median creates a road diet, narrowing travel lanes 118
9.15 Landscaping, lighting, and street furniture 119
9.16 Redevelopment Concept 120
9.17 Mixed-Use building with on-street parking 121
9.18 Carriage house 121
9.19 "Community Center area, existing conditions aerial" 122
9.20 Community Center area, existing conditions birds eye view 122
9.21 "Neighborhood Center area, existing conditions aerial" 123
9.22 "Neighborhood Center area, existing conditions birds eye" 123
9.23 Community Center Land Use and Circulation 124
9.24 Neighborhood Center Land Use and Circulation 124
9.25 Smaller Scale Neighborhood Commercial 124
9.26 Community Center Circulation 128
9.27 Community Center Illustrative Plan 129
9.28 Terminated Vista 130
9.29 Public Plaza 130
9.30 Park and Community Garden 130
9.31 Birds eye view looking south and west from Chambersburg intersection, showing Huber Center 131
9.32 Birds eye view looking south and west from Chambersburg intersection, Huber Center replaced with new development 132
9.33 Civic building looking north and west from Huber Center 135
9.34 Phase I 137
9.35 Phase II 138
9.36 Phase III 139
II.1 Discoverbrandtpike.com homepage 155
II.2 Online survey used during data collection 155
II.3 Community Workshop flier 155
II.4 Mapping activity at the community workshop 156
II.5 Mapping activity at the community workshop 156
II.6 Renderings of initial redevelopment concepts 156
II.7 Presenting redevelopment concepts on the final night of the community workshop 156
II.8-II.12 Selected survey responses 157-158
III.1 City of Huber Heights Zoning Map 159
III.2 Brandt Pike Corridor Zoning 160

List of Tables

Table # Title/Caption Page #
5.1 Existing and Alternative Development Features 30
7.1 Vacant Commercial Space 51
7.2 Occupied Commercial Space 52
7.3 Commercial Businesses by Zone — Taylorsville Zone 60
7.4 Taylorsville Five Minute Leakage/ Surplus 62
7.5 Commercial Businesses by Zone — Chambersburg Zone 64
7.6 Chambersburg Five Minute Leakage/Surplus 66
7.7 Commercial Businesses by Zone — Nebraska Zone 68
7.8 Nebraska Five Minute Leakage/ Surplus 70
7.9 Aggregate Five Minute Leakage/ Surplus 72
7.1 Demographic Metrics, Regional Comparison 80
7.11 Regional Commercial Properties 81
7.12 Strip Shopping Centers Along Brandt Pike Corridor 82
7.13 Office Space Along Brandt Pike Corridor 86
7.14 Total Population 2000-2040 88
7.15 Total Households 2000-2040 89
7.16 Households by Tenure (2000-2021) 90
7.17 Rental Housing Units by Number of Units in Structure — percent of All Rental Units 94
7.18 Rental Housing Units by Year Structure Built — percent of All Rental Units 96
7.19 Short-Term Rental Housing Demand (5 Years) Within Housing Market Area 96
7.2 Mid-Term Rental Housing Demand (10 Years) Within Housing Market Area 96
7.21 Historic Home Sales in Huber Heights 98
7.22 Short-Term For-Sale Housing Demand (5 Years) Within Housing Market Area 99
7.23 Mid-Term For-Sale Housing Demand (10 Years) Within Housing Market Area 99
7.24 Mid-Term Rental Housing Demand (10 Years) Single-Family Home Rental Conversion Scenario 99
7.25 Mid-Term For-Sale Housing Demand (10 Years) Single-Family Home Rental Conversion Scenario 99
7.26 Senior Housing Projects within Housing Market Area 100
7.27 Rental Housing Demand Households Age 55 and Over Within Market Area 100
7.28 Independent Living Household Demand (Year 2021) Within Housing Market Area 101
7.29 Assisted Living Household Demand (Year 2021) Within Housing Market Area 101
7.3 Nursing Care Household Demand (Year 2021) Within Housing Market Area 101
8.1 SWOT Analysis 103
9.1 Alternate Commuter Routes 117
9.2 Building and Lot Types 125
9.3 Park Types 126
9.4 Street Types 127
10.1 Redevelopment Strategy Timeline 150

Appendix II: Public Involvement Process

A robust public involvement effort is essential to any community planning process. Inclusive planning ensures that the project team gains a thorough understanding of existing conditions from local experts, and leads to thoughtful and nuanced recommendations that are beneficial over the long-term.

This section describes the diverse spectrum of public involvement activities that was used to engage various groups throughout the course of the project.

Meetings

Meetings were held at key points during the planning process to gather information and update stakeholders on the project's status.

Project Kick-Off | July 25, 2016

A public meeting was held to kick off the project, explain the goals and objectives, and introduce the project team to city staff and the general public.

Steering Committee | October 11, 2016

At the first Steering Committee meeting, the project team presented preliminary findings on Brandt Pike's existing conditions and public involvement efforts to committee members.

Publicity and Outreach | October 27, 2016

The Publicity and Outreach Committee discussed strategies for advertising the upcoming community workshop. The committee developed an exhaustive list of communications tools, from social media to handouts at polling stations on Election Day. Fliers and digital media were reviewed as well.

Community Workshop | November 15-17, 2016

The community workshop is described in detail on the following page.

Steering Committee | January 24, 2017

The project team presented and discussed the results of the Community Workshop, a summary of the draft plan and an outline of the draft plan review process.

Open House | May 11, 2017

A final draft of the plan was presented to the Public.

Figure II.1: Discoverbrandtpike.com homepage

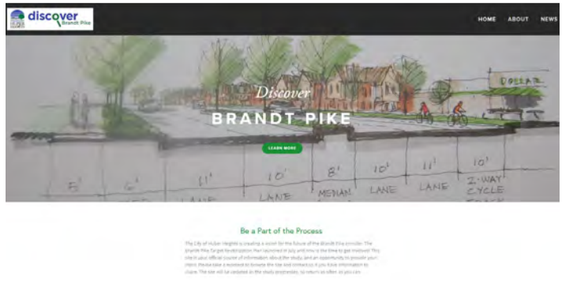


Figure II.2: Online survey used during data collection

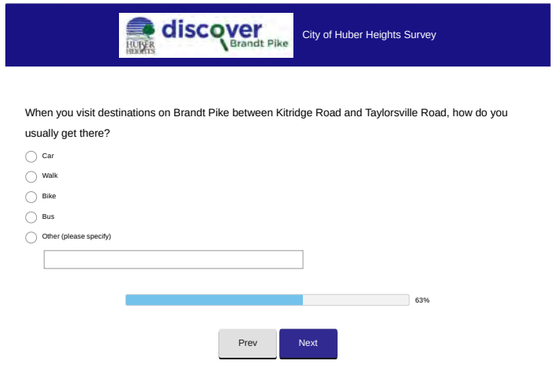


Figure II.3: Community Workshop flier

Website

A project-specific website was launched in September, 2016. Discoverbrandtpike.com gave an overview of the project's goals and objectives, timeline, and other frequently asked questions, and was regularly updated with postings about the project's progress. More importantly, the website served as a portal for people who wished to participate in the planning process. It listed contact information for City staff and project team members, linked to the project's community-driven Facebook page with over 300 members, and provided bulletins about upcoming meetings and events, and links to presentations from past meetings. Over 1,300 individuals generating more than 4,000 page views visited the website between September, 2016 and January, 2017.

41 percent of visitors accessed the site through the City of Huber Heights website, where the link was displayed on the site's homepage. 35 percent of website visitors accessed the site directly, meaning that they used the website's address, www.discoverbrandtpike.com, to navigate to the page. This number suggests that the print material — which included the website address and a QR code — distributed widely throughout the community, was an effective way to steer people towards the site. Social media, Google searches, and community websites account for the remaining visitors.

Community Workshop

Public involvement efforts culminated in a three day community workshop from November 15 to 17, 2016. Business owners, residents, and other stakeholders had the opportunity to learn about the project and have their voices heard. Activities during the workshop included:

- Public meetings and presentations
- Steering Committee meeting
- Walk Audits
- Mapping activities

Figure II.4: Mapping activity at the community workshop

Figure II.6: Renderings of initial redevelopment concepts

Figure II.5: Mapping activity at the community workshop

Figure II.7: Presenting redevelopment concepts on the final night of the community workshop

With input from the public and city staff, the project team created redevelopment concept plans for key points along the Pike, including Huber Center. Maps, renderings, photographs, and other visual media were used to share these ideas with the public and solicit their feedback. The material generated during the workshop served as a starting point for the complete redevelopment plan, described in detail in Chapters 9 and 10.

Stakeholder Interviews

The project team interviewed 14 business and property owners on Brandt Pike during initial data collection and field work. Results from these interviews were used to inform the market analysis in Chapter 7.

1. Cassano's Shopping Center
2. Dayton Metro Library Huber Heights Branch
3. Dragon Buffet shopping center
4. Equity, Inc.
5. Gem City Shopping Center
6. Good Samaritan Hospital
7. Huber Center
8. Huber Heights Chamber of Commerce
9. Huber Heights City Schools
10. Huber Heights Senior Center
11. Lofino's Shopping Center
12. Marian Lanes
13. Marian Shopping Center
14. St. Peter Catholic Church

Survey

The project team designed an online survey to gauge public opinion and collect data about current conditions on the Pike. It included questions about transportation, land use, property conditions, and the economy. The survey also asked participants about their aspirations for Brandt Pike's future, and what changes they hope to see as the area is redeveloped.

The survey used skip logic to present specific questions to targeted groups of respondents: business owners on Brandt Pike, residents who live in the project study area, and the general public. Responses from the 25 business owners who took the survey were used to supplement the stakeholder interviews conducted in person with business owners on the Pike. Questions for residents in the study area focused on transportation issues.

More than 300 individuals responded to the survey, which was active from September 26 to November 18, 2016. A selection of responses is included below.

Figure II.8: When you visit destinations on Brandt Pike between Kitridge Road and Taylorsville Road, how do you usually get there?

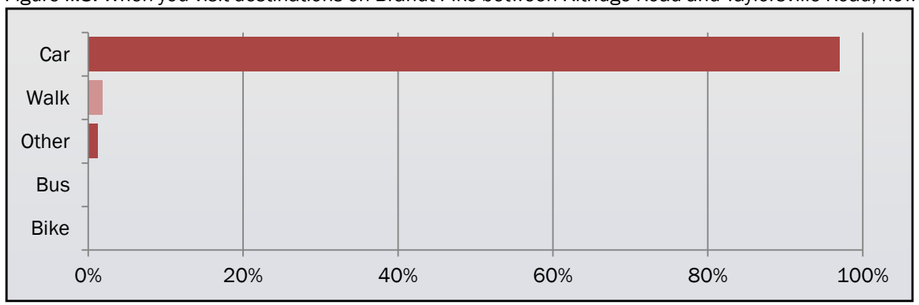


Figure II.9: What obstacles to revitalization do you see along the corridor?

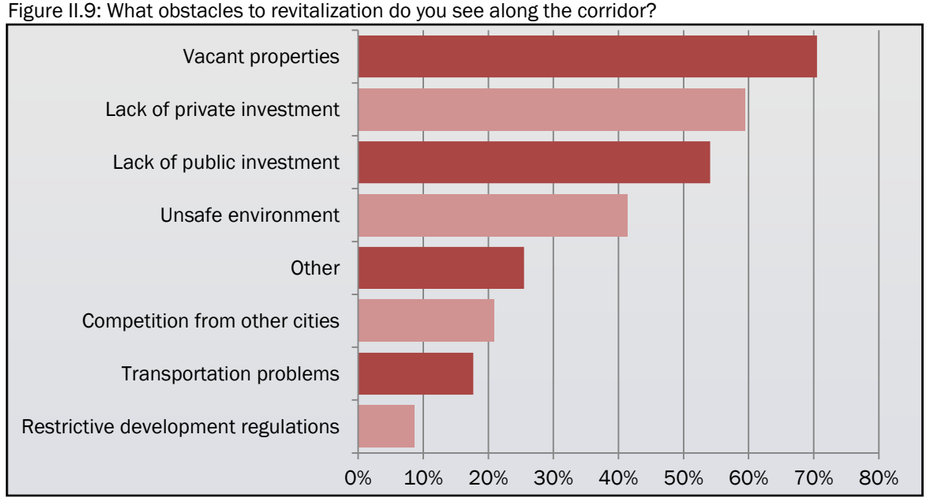
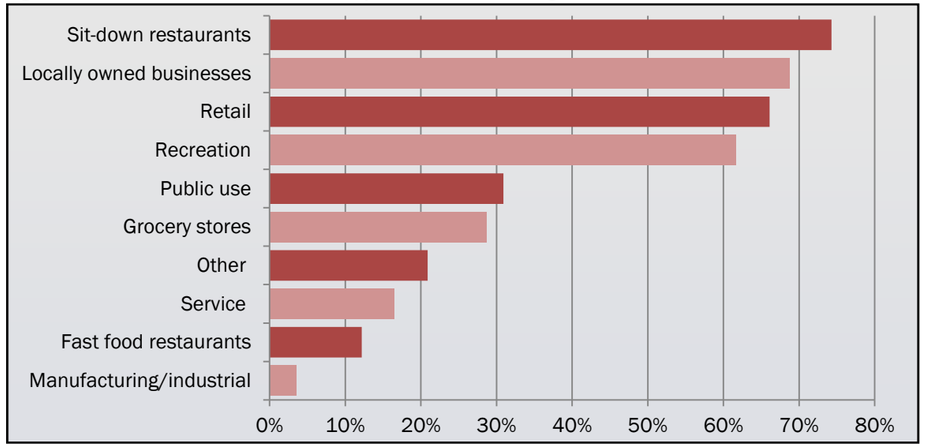


Figure II.10: What kind of businesses do you want to see along the corridor?



Imagine yourself traveling down a revitalized Brandt Pike 10 years from now.

Figure II.11: How will you get there most of the time?

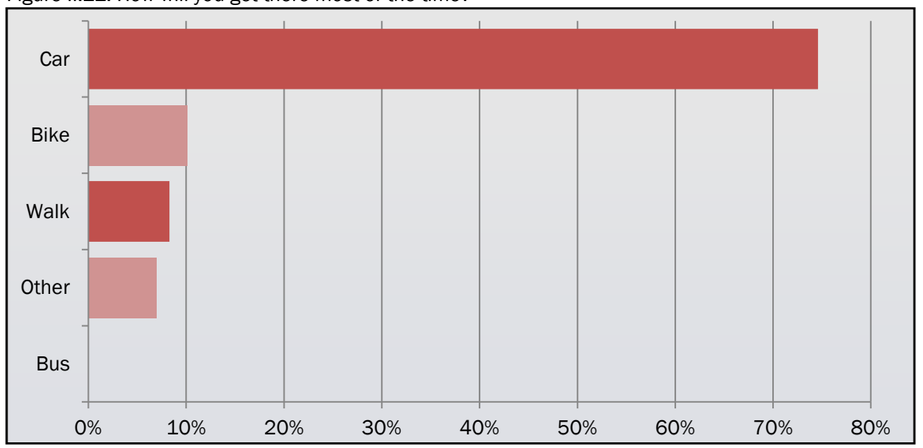
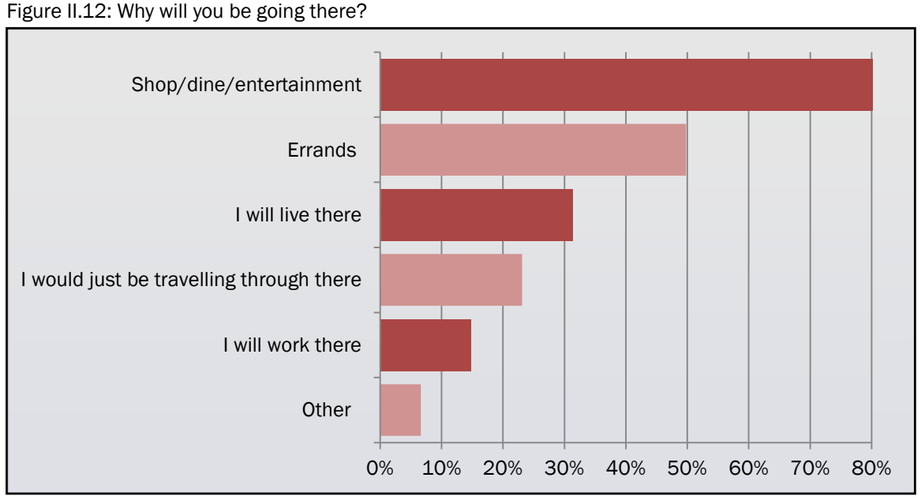


Figure II.12: Why will you be going there?



Appendix III: Regulatory Assessment

Zoning Assessment

Part Eleven, Planning and Zoning Code, in the City's Codified Ordinances, controls development within the community and includes both subdivision and zoning provisions. Zoning, and the concept of dividing the City into zones, was originally created to ensure compatibility between uses and to prevent nuisances.

Since the City's zoning code was adopted in 1983, the it has been revised several times, with new zoning districts added. Today, there are 30 districts (Figure III.1)) in the Planning and Zoning Code, each with its own set of regulations and additional regulations that apply specifically to individual uses, and to the City as a whole. Within ¼ mile of Brandt Pike (study area boundary) there are 14 of these zones, each one controlling a separate land use, ranging from single family to light industrial (Figure III.2).

The purpose of this assessment is to examine where the current zoning code may either pose obstacles during implementation of the Brandt Pike Target Revitalization Plan, or lack the necessary procedures and standards to help realize the Plan's recommendations and guiding principles.

This assessment uses the Planning Principles outlined in Chapter 9 to evaluate how the code is either consistent or inconsistent with these principles and suggest ways the code can be improved.

Planning Principles

Create a compact, walkable environment with a healthy mix — both horizontal and vertically — of commercial and residential uses.

Because existing zoning provisions were originally created to be sure there was compatibility between uses and to prevent nuisances, there was no intent at that time to create a "compact, environment." This separation has resulted in lower densities, which makes it difficult to encourage walking as an alternative and healthier form of travel. Mixing uses, both horizontally and vertically, will help make the area more compact, as well as increasing density.

But making a place walkable requires more than just the close proximity of uses. A walkable place also needs to be engaging, and offer passersby something interesting to look at, and maybe partake in. Window shopping is a good example of an engaging walking environment. Parks, public art, and playgrounds are just a few of the many ways to make a place more engaging.

The current pattern of development along Brandt Pike offers little in the way of engaging activity for pedestrians, and includes the

Figure III.1: City of Huber Heights Zoning Map

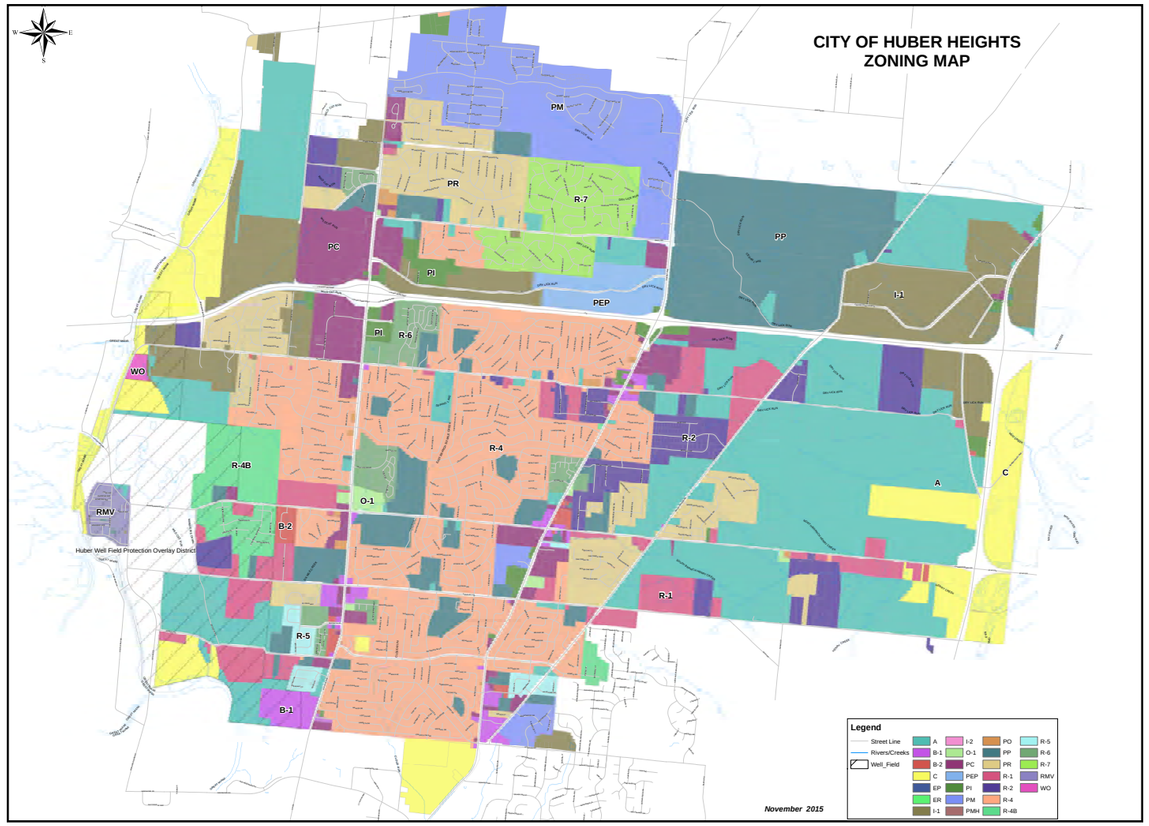
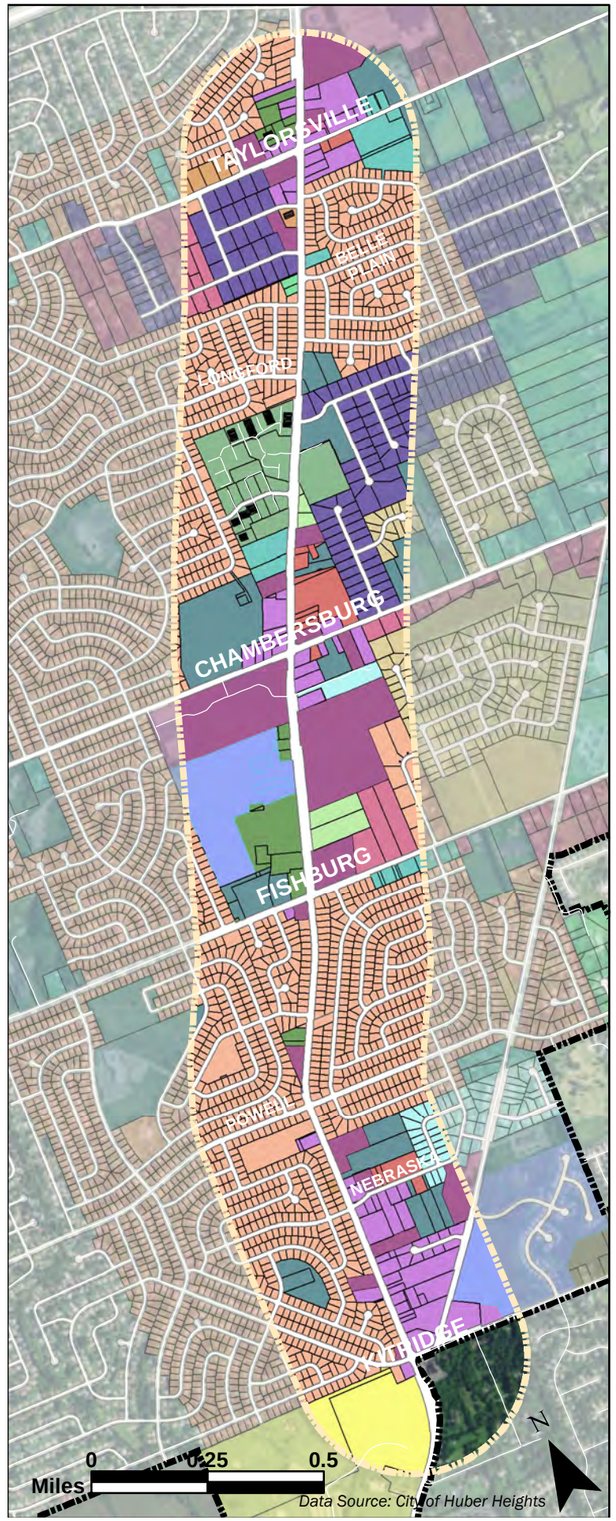


Figure III.2: Brandt Pike Corridor Zoning



separation of uses with long distances in between them. It is possible, with the right intentions and the right development standards in place, to be sure that future development is more compact, walkable and includes a mix of uses.

For instance, the minimum front yard depth or building setback in the "B-1" Commercial District is 25 feet. Having a 25-foot minimum setback means that parking for commercial uses will, more than likely, be placed in the front yard where retailers have traditionally located parking. This, however, detaches the building from the street, where sidewalks and transit stops are located, requiring pedestrians to walk further to their destination and signage to be larger.

Placing the building further forward and parking to the side or rear yard, while providing an entry toward the front of the building and canopies to protect against inclement weather, reduce signage, and make for a much more interesting and pleasant walk. Sidewalks are available along the entire stretch of Brandt Pike, but they are hardly used, primarily for this reason.

Place civic uses — parks, schools, churches, libraries — at the core of neighborhoods.
The location of civic uses is not a major consideration in the existing zoning code, nor is the importance of designing development with the characteristics of a neighborhood (e.g. accommodating most daily trips within a reasonable walking distance). With civic uses at the center of the neighborhood in a convenient, accessible location, the emphasis is placed on the needs of the public. Zoning districts along the corridor should include civic uses among their list of permitted uses and contain standards that ensure they are properly located.

Transform Brandt Pike from an auto-oriented roadway to a route for safely accommodating multiple modes of travel — auto, transit bicycle and pedestrian.
With the exception of street design and engineering standards within the subdivision regulations, there are no provisions specifically addressing transit, bicycle, or pedestrian travel. Roadway standards are primarily for allowing unimpeded flow of motorized traffic and do not account for the characteristics of other travel modes or differences in adjacent land uses. Standards that specify the width of a bike lane, for example, or classify streets according to the land uses they serve should also be part of a zoning code.

Reduce the size of blocks, consolidate access, and improve street interconnection.
Current subdivision standards require that "no block shall be longer than 1,500 feet" and "where blocks are over 900 feet in length a walkway not less than ten (10) feet in width at or near the halfway point may be required." If there was one standard that would make the biggest difference in improving walkability and decreasing roadway congestion, it is block size. Reducing block length to a maximum of 300-500 feet would give pedestrians more crossing points and auto travelers would have more choices to navigate the roadway network instead of being funneled onto only a few routes. Maximizing the size of blocks at a more reasonable dimension and controlling for not only length but depth, will go a long way in making the corridor more livable.

Increase the diversity of residential and commercial building types in order to allow a wider variety of living, working, and shopping choices
One of the keys to a successful community is to accommodate residents of all ages and across as much of the demographic spectrum as possible. To allow existing residents to age in place and to attract new residents, the type and availability of housing needs to be more varied especially in places like the Pike. This ranges from housing to accommodate single occupants to housing for seniors that varies in design depending on mobility. The zoning code can be updated to not only allow but encourage these newer forms of housing. Standards should also be in place to ensure they are not separated from other supportive uses and are accessible to transit.

Concentrate redevelopment at key strategic locations — at both community and neighborhood scales to serve as a catalyst for future growth.
Fortunately, most of the non-residential growth along the corridor has concentrated at its three major intersections with Taylorsville Road, Chambersburg Road, and Kitridge Road. But, there have been several instances where residential parcels fronting the Pike in between these intersections have been combined and rezoned for commercial use. If these parcels are to be combined they should be for higher density residential use and to reduce the number of curb cuts. As has been demonstrated in the Plan, there is already enough land along the corridor that is zoned for commercial use that is either vacant or underutilized to accommodate future growth. The zoning regulations should be structured to not allow commercial use in these areas and to encourage higher density residential, primarily to support future redevelopment surrounding the three intersections.

General Recommendations

Because it would be difficult to incorporate these and other provisions into 14 separate zoning districts, it is recommended that an overlay district be created for the entire corridor. Once zoned, the underlying uses can remain in place with the overlay providing additional standards tailored for Brandt Pike and following the Community and Neighborhood Centers and Segments concept outlined in Chapter 9.

Within the overlay district, the standards should be based on the form of development rather than focusing on regulating use. How land and buildings are used is important, but shifting the emphasis to things like how buildings and parking relate to the fronting street will give needed shape to the public realm (see Chapter 5). It will also go a long way toward making Brandt Pike a more enjoyable place to shop, work, and gather — the hallmarks of a true Main Street.

Appendix IV: Commercial Market Supplementary Analysis

There are several challenges facing Huber Heights and the Brandt Pike corridor with respect to its revitalization efforts. First, the most problematic issue is the oversupply of existing retail/flex office space. There is simply too much leasable, low-quality space available. This oversupply is depressing rents and encouraging incompatible and fragmented uses. To make matters worse, the national retail market is oversupplied by as much as 50 percent. This is being played out daily in the form of mass retail closings nationwide. In the absence of a coordinated effort, the commercial real estate market along Brandt Pike will continue to develop in a piecemeal fashion and existing retail and office "centers" will likely continue underperforming.

The challenges facing Brandt Pike will require an effort that goes beyond the public and private sector's individual abilities to turn the tide. To that end, we recommend one or more public-private partnerships as a means to develop and/or redevelop larger properties. The public-private partnership is a relationship between the City of Huber Heights or a quasi-public institution such as a Community Improvement Corporation, and private sector entities such as property developers. The public-private partnership provides for opportunities to leverage each partner's strengths and capabilities while spreading out the overall risk. Examples of this include the use of Eminent Domain, Tax Increment Financing, and project financing via the public side, while the private partner focuses on the actual design and implementation of a development deal.

The market analysis revealed that there are several market opportunities for providing goods and services where the data indicates consumer expenditures exceed the existing supply of those goods and services. But the appetite for retail is changing both locally and nationally. We are experiencing a period of great disruption and there are significant risks involved with blindly entering a market. This is one of the reasons we suggest the City approach this cautiously alongside local development partners.

The oversupply of retail strip centers along Brandt Pike presents a redevelopment opportunity – especially if some of the existing product can be removed from inventory via demolition or the rehabilitation and repurposing of some of that existing product. Essentially, we are advocating for the development of projects that:

- Leverage existing assets to the largest extent possible
- Facilitate opportunities for "spillover" traffic via the establishment of "districts" which encourage compatible uses

Without prescribing the exact location of any redevelopment site, the following paragraphs explain with a minimal amount of specificity, the types of projects that could take advantage of the opportunities found along Brandt Pike.

The market analysis revealed a lack of supply of specialty food stores such as baked goods and import/ethnic food stores. In fact, approximately 87 percent of consumer expenditures in this sector are leaking outside of the market area. The demand for such goods is generally more elastic than the demand for ordinary grocery items. In other words, the consumer is more likely to travel greater distances to procure such goods. Within a 15-minute drive of the intersection of Chambersburg and Brandt, there are only nine stores that fit into this category. This is an opportunity for not just a single retailer in this sector, but for several distinct retailers that cater to different niches within this market subsector. This is an opportunity to utilize branding as a means of establishing a "district." For example, there are several strip centers with multiple vacancies that could absorb specialty food merchants. Concentrating them in a single location could encourage consumers to shop at multiple stores because of their similarities and their proximity to one another.

If branding and marketing efforts are undertaken early in the process, it is likely that over time the "district" will attract more vendors and thus strengthen its position as a "destination." The greater Dayton market area currently has no such destinations.

The market analysis also determined that demand for full-service restaurants and bars exceeds supply starting around the Chambersburg area and increases as you go further south. In addition, the Brandt Pike corridor, and Huber Heights in general, does not have a plethora of entertainment options. The bowling alley has been successful and it continues to expand to meet the demand for entertainment and gathering space. The skating rink has been relatively successful but is subject to seasonal changes in demand. It makes sense to encourage uses such as full-service restaurants, bars, and other entertainment options within close proximity to either of these established businesses. One of the characteristics of the "Millennial" generation and those younger, is the desire for "experiences" over "things." This is one of the contributing factors to the decline in traditional retail. It also helps explain the preference for "lifestyle centers" such as The Greene in Beavercreek and Easton in Columbus over the ubiquitous enclosed mall or sprawling strip center. The experience of a walkable environment that combines retail and entertainment is a draw for consumers as much as, or more so than, the individual shops and entertainment options themselves.

The establishment and nurturing of the aforementioned districts of compatible uses would benefit greatly from an increase in population density that new housing developments could provide. The two types of projects are inherently distinct but would stand to benefit from each other – a symbiotic relationship of sorts. Similar to the concept of establishing "districts", the housing project(s) could employ a public-private partnership approach that could include infrastructure and structure improvements. Depending on the type of housing, nearby retailers could benefit from the proximity to a built-in market and improved linkages between housing, entire neighborhoods, and repurposed strip centers.

The repurposing of existing strip centers could easily include new or relocated civic uses. Many civic uses are capable of driving traffic to the use if the use is desirable and/or an accepted common good. Even civic uses such as police and fire are popular choices for inclusion within redevelopment projects because of the 24-hour nature of the use. In other words, there is an enhanced feeling of safety around civic uses because of their activity levels and their role in society. The inclusion of such a use constitutes leveraging existing assets as part of a larger project.

Local development partners should be recruited for potential redevelopment projects. If there are local developers with a presence in the community, they should be some of the first consulted. Further, connecting these developers with existing property owners will be crucial for larger undertakings – a task perhaps best suited for a Community Improvement Corporation. The City can take advantage of projects that include more than one private partner by providing improvements or services that can be utilized by all of the private partners – thus reducing the average cost of improvements and maximizing the benefits of the public's contribution.

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