

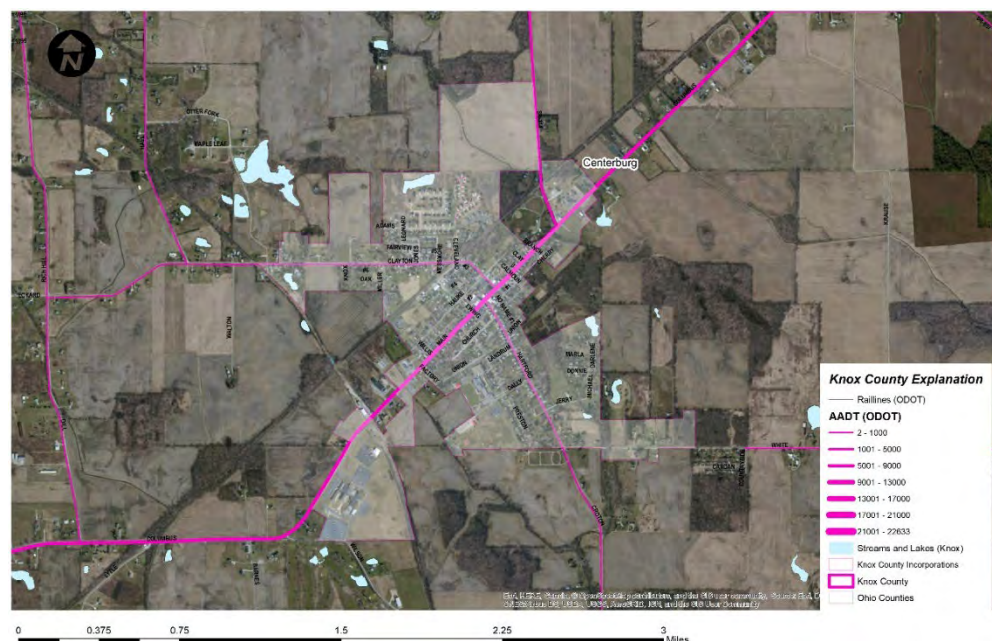
Background

Centerburg is the geographical center of the State of Ohio. The village is in the southwest quadrant of Knox County, Ohio, in Hilliar Township. Centerburg, approximately 35 miles or 45 minutes by car, is the closest place in Knox County to Downtown Columbus. US Highway 36, also known as Columbus Road in the western half of Knox county Centerburg to Interstate 71 through Sunbury in the adjoining County of Delaware. Columbus is the fastest growing metropolitan region in the State of Ohio. US Highway 36, or Columbus Road, carries approximately 9,500 vehicles per day (AADT, ODOT 2017 estimate). Hartford Avenue leads south out of town in the direction of the Hartford Fairgrounds in Licking County. The elementary school for the Centerburg Local Schools district is south of the center of town, between Main Street and Hartford Avenue. The combined middle and high school campus is located at the edge of the village along Main Street.

The heart of Centerburg is the intersection of Main Street and Hartford Avenue. Small businesses, banks, and homes are clustered here. On the southwest side of town (in the direction of Columbus) small chains including the Village's grocery store have been established more recently. Most of the activity today, still is clustered between the Main Street and the parallel rail corridor. The rail line has been removed and is now the Heart of Ohio Trail which cuts diagonally through Knox County. The multiuse trail links Centerburg, Danville, and Mount Vernon with Columbus via Westerville. The Heart of Ohio Trail has recently been designated part of the first multiuse Great American Rail-Trail that crosses the country.

The following describes how the Village compares statistically to the geographies within Knox County.

Figure 1.
Vehicles per day
on major
thoroughfares



Population Characteristics

The population of Centerburg increased from 1,471 in 2000 to 1,773 in 2010, a change of 20.5%. The estimated population for Centerburg in 2019 is 1,960 and projected to increase to 2,098 by the year 2024, at an annual rate of 1.08%. Centerburg is the fastest growing village in the county with a growth rate of over 40% from 2000 to 2024, or approximately 27 people per year in that time. The population increase between 2000 and 2019 of 33 percent out paces the growth experienced in Danville (6.8%), Fredericktown (0.9%), Gambier (25.5%), Mount Vernon (5.1%), and Knox County (14.9%). The State of Ohio has grown by 3.7% since 2000 but almost all of Ohio's growth during this time has been concentrated in and around Columbus and suburban Cincinnati.

The following table describes each village in Knox County in terms of population, by the number of households, the number of families, and the size of households and families. The 2000 and 2010 figures are from the Decennial U.S. Census. The 2019 and 2024 figures are estimates. A household includes all the people occupying a housing unit. The size of family includes the family householder and all other people in the living quarters who are related to the householder by birth, marriage, or adoption.¹ The column pertaining to Centerburg Village is highlighted. Other places within the county and Knox County are included for comparison.

Fifty-one people in Centerburg live in group quarters. Potential locations for this population include the Centerburg Respiratory and Specialty Rehab Center on Fairview Avenue, Centerburg Pointe on Columbus Road, and Centerburg Place on Houck Street. More will be discussed in the section on Senior Living below. Group quarters include college or university student housing, correctional facilities, residential treatment centers, and nursing facilities. No correctional facilities are known within the four villages. Nearly 1500 (75%) of the population of Gambier live in group quarters.

Household composition within Centerburg has remained steady since 2000. The average household size for those within Centerburg is approximately 2.75 persons. Family households account for over 75 percent of all households in Centerburg. This characteristic is shared with Danville Village and rural Knox County.

The median age of the population of Centerburg, Danville, and Fredericktown is in the upper 30s. The median age of Centerburg is projected to decrease slightly by 2024, as new residents – young families – move into the area.

¹ U.S. Census Current Population Survey (CPS) subject definitions

	Centerburg Village	Danville Village	Fredericktown Village	Gambier Village	Mount Vernon	Knox County
Population Summary						
2000 Total Population	1,471	981	2,514	1,947	16,196	54,500
2010 Total Population	1,773	1,044	2,493	2,391	16,904	60,921
2019 Total Population	1,960	1,048	2,536	2,436	17,022	62,611
2019 Group Quarters	51	0	2	1,448	1,295	3,510
2024 Total Population	2,068	1,055	2,571	2,455	17,191	63,751
2019-2024 Annual Rate	1.08	0.13	0.27	0.16	0.20	0.36
2019 Total Daytime Population	1,939	1,022	2,825	2,931	23,523	58,148
Workers	1,036	504	1,412	1,637	13,874	24,998
Residents	903	518	1,413	1,294	9,649	33,150
Household Summary						
2000 Households	506	402	1,056	295	6,496	19,975
2000 Average Household Size	2.79	2.44	2.38	2.54	2.27	2.56
2010 Households	622	425	1,050	343	7,064	22,607
2010 Average Household Size	2.77	2.46	2.37	2.78	2.21	2.54
2019 Households	699	426	1,076	352	7,163	23,377
2019 Average Household Size	2.73	2.46	2.36	2.81	2.20	2.53
2024 Households	740	429	1,095	359	7,263	23,868
2024 Average Household Size	2.73	2.46	2.35	2.81	2.19	2.52
2019-2024 Annual Rate	1.15	0.14	0.35	0.39	0.28	0.42
2010 Families	474	306	695	150	4,172	15,693
2010 Average Family Size	3.19	2.90	2.90	3.24	2.85	3.04
2019 Families	525	301	697	147	4,109	15,935
2019 Average Family Size	3.17	2.93	2.90	3.28	2.87	3.05
2024 Families	554	302	703	148	4,123	16,170
2024 Average Family Size	3.16	2.93	2.90	3.27	2.87	3.05
2019-2024 Annual Rate	1.08	0.07	0.17	0.14	0.07	0.29

Table 1. Total population, total number of families, total number of households, average family size, and average household size for geographies in Knox County in 2000, 2010, estimated for 2019, and projected for 2024.

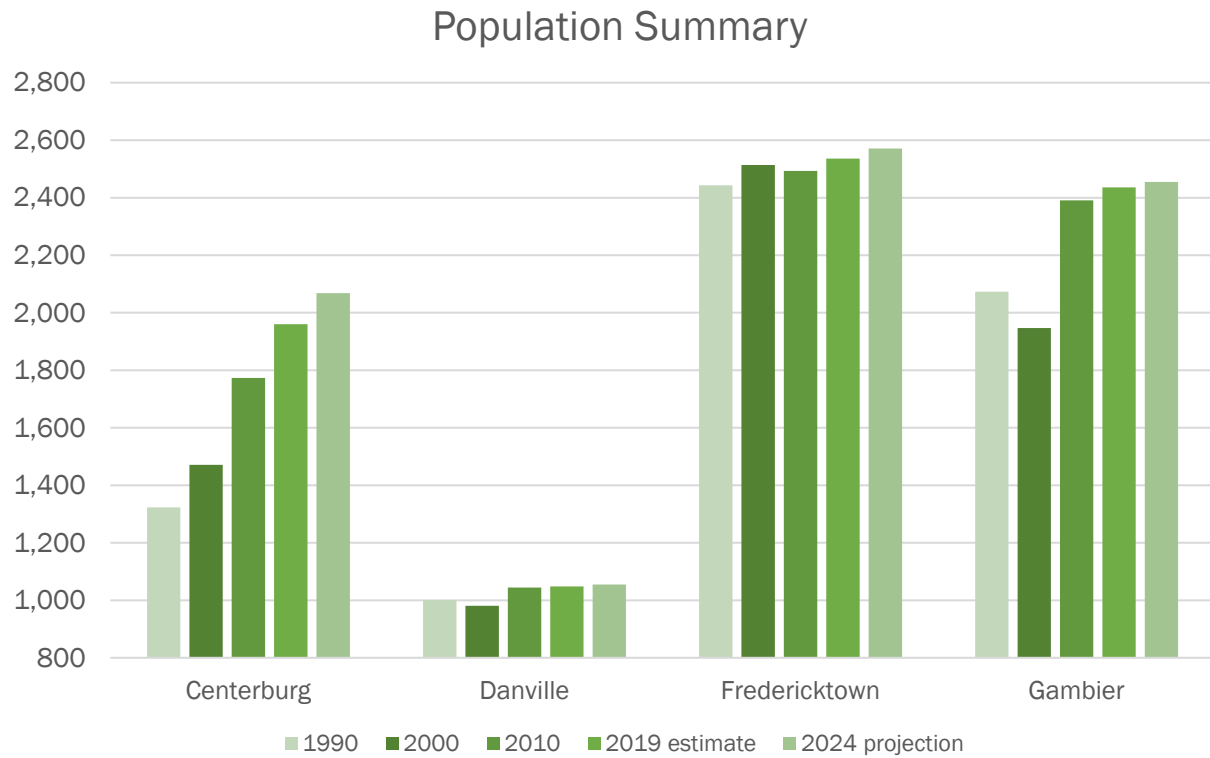


Table 2. Population in each village counted in 1990, 2000, and 2010 US Census with third party estimates for 2019 and 2024.

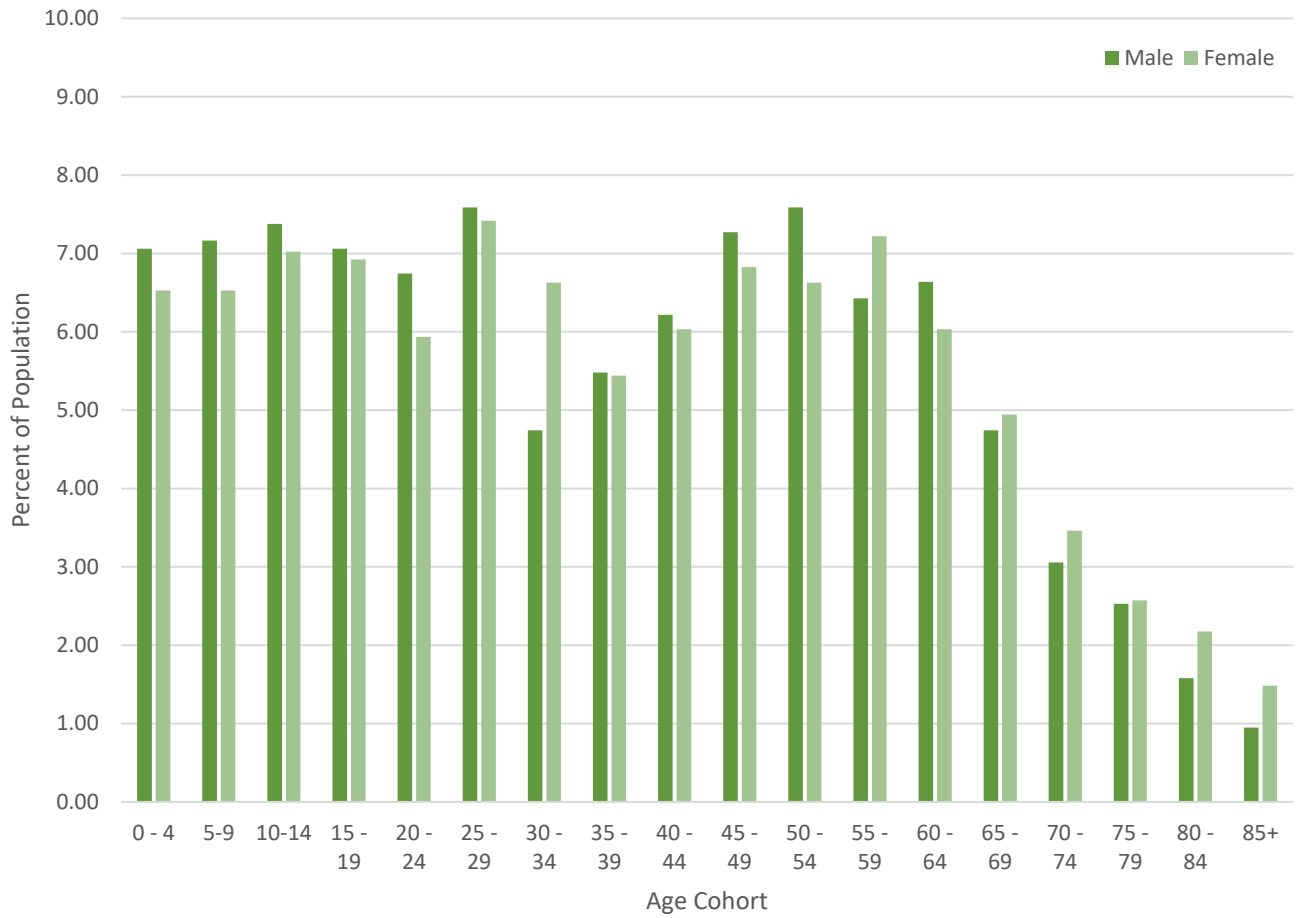


Table 3. Population cohort for village in 2019.

	Centerburg Village	Danville Village	Fredericktown Village	Gambier Village	Mount Vernon	Knox County
Median Age 2010	36.6	35.9	37.2	22.1	38.6	38.1
Median Age 2019	37.6	37.4	38.1	22.2	40.2	39.7
Median Age 2024	36.0	39.0	38.5	22.3	41.5	40.7

Table 4. Median Age by year with accompanying chart to expand on the age by sex cohort for the village in 2019.

	Centerburg Village	Danville Village	Fredericktown Village	Gambier Village	Mount Vernon	Knox County
Household Income Base	699	426	1,076	352	7,163	23,377
Percent within cohort						
<\$15,000	11.4	14.3	9.9	9.1	15.2	10.7
\$15,000 - \$24,999	8.9	10.1	10.2	7.4	12.3	9.1
\$25,000 - \$34,999	6.7	11.3	19.6	6.3	12.8	11.1
\$35,000 - \$49,999	9.4	21.6	16.2	12.5	17.5	16.3
\$50,000 - \$74,999	18.7	19.2	17.0	19.6	20.5	20.2
\$75,000 - \$99,999	21.3	12.2	14.8	8.2	10.2	14.3
\$100,000 - \$149,999	19.2	6.8	8.1	27.3	7.6	12.0
\$150,000 - \$199,999	3.6	3.1	1.9	8.2	1.7	3.9
\$200,000+	0.7	1.4	2.2	1.7	2.1	2.5
Median Household Income	\$65,994	\$43,593	\$43,227	\$67,121	\$41,948	\$52,427
Average Household Income	\$70,581	\$56,788	\$59,494	\$80,772	\$56,399	\$67,814
Per Capita Income	\$25,187	\$20,761	\$25,090	\$14,986	\$23,592	\$25,425
Income Disparity Ratio	0.07	0.30	0.38	0.20	0.34	0.29

Table 5. Household Income

The average and median income for households within Centerburg Village are \$70,581 and \$65,994.

Approximately 20 percent of households within Knox County live below the federal poverty guideline of \$25,100 (for a family of four). Within Centerburg Village that number is 20.3 percent. Nationally, the poverty rate has declined since 2014 when the rate was 14.8 percent. Today, the national poverty rate sits at 12.3 percent, which is almost identical to that in the State of Ohio.

Workforce Analysis

Over 50 percent of Centerburg residents 25 and over have some college experience or have earned a degree. Nineteen percent in Centerburg have a bachelor's degree which is a rate ahead of all other municipalities villages and statistical units within Knox County except Gambier. Gambier is home to Kenyon College and as a college town is statistically different where age, and income cluster on the low end for most residents who live in group quarters for 9 months out of the year in pursuit of higher education. Data for Gambier also reflect the age, income, and education of professors at the college. In Centerburg and the other villages in Knox County, the data represent households across many life stages and experiences. For 40 percent of Centerburg Villagers over the age of 25, a high school diploma is the highest level attained. In Knox County and the State of Ohio approximately 37 percent and 39 percent respectively, have achieved a high school diploma as their highest level of educational attainment.

Over half of the residents of Centerburg have some college or have earned a degree. In Knox County 17 percent are employed in manufacturing, 13 percent in educational services, and 12 percent in educational services. In Centerburg, employment is concentrated in the construction industry (nearly 15 percent) and the retail industry (over 13 percent), proportions larger than that of any other community in the comparison chart. At this level of analysis, we can ascertain that Centerburg residents are compensated at a level commensurate to educational attainment and/or households typically have two income earners.

	Centerburg Village	Danville Village	Fredericktown Village	Gambier Village	Mount Vernon	Knox County
Total Age 25+	1,291	702	1,717	562	11,614	41,868
Highest Level Attained (%)						
Less than 9th Grade	0.62	4.42	1.34	0.53	3.27	3.34
9th - 12th Grade, No Diploma	3.49	6.13	5.88	0.00	6.90	5.14
High School Graduate	40.98	41.31	31.04	13.35	37.02	36.98
GED/Alternative Credential	2.40	2.85	2.21	0.00	4.72	4.10
Some College, No Degree	17.35	17.09	26.21	10.50	18.58	19.28
Associate Degree	10.77	8.97	8.44	2.67	6.39	7.40
Bachelor's Degree	19.05	15.10	14.15	30.25	15.00	15.89
Graduate/Professional Degree	5.34	4.13	10.72	42.70	8.12	7.86

Note: percent values for each village greater than the percent value for the whole of Knox County, Ohio are emphasized.

Table 6. Educational Attainment

	Centerburg Village	Danville Village	Fredericktown Village	Gambier Village	Mount Vernon	Knox County
2018 Employed Population 16+ by Industry						
Total	1,089	557	1,179	1,220	7,866	31,064
Agriculture	7	33	3	0	16	535
Mining	3	3	0	0	3	34
Construction	157	38	94	85	313	2,590
Manufacturing	168	102	222	13	1,385	5,082
Wholesale Trade	44	4	16	0	65	690
Retail Trade	143	52	135	68	683	2,485
Transportation	34	5	30	0	221	1,101
Utilities	7	4	0	2	25	315
Information	11	11	50	19	68	487
Finance/Insurance	72	8	62	77	310	1,352
Real Estate	10	13	5	17	97	317
Professional/Tech Services	37	8	30	27	148	827
Management	0	0	0	0	0	0
Admin/Waste	33	10	24	35	201	888
Educational Services	84	45	96	576	1,148	3,636
Health Care	99	110	207	74	1,179	4,010
Arts/Entertainment	6	0	0	10	46	195
Accommodation/Food Services	32	26	85	108	870	2,418
Other Services	72	34	53	58	438	1,744
Public Administration	47	31	26	6	199	1,027

Note: percent values for each village greater than the percent value for the whole of Knox County, Ohio are highlighted. Source: 2019 ESRI Business Analyst estimates.

Table 7. Employment by Industry

Commute for Work	Estimate	PCT
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Centerburg ACS 2013-2017

Worked in Place of Residence	205	26.5%
Worked Outside Place of Residence	569	73.5%
Worked in Knox County	322	41.6%
Worked outside Knox County	449	58.0%
Worked Outside Ohio	3	0.4%
Total Workers 16 and Over	774	100.0%

Table 8. Commute for work

The Knox County Comprehensive Plan 2018 Update by reference to analysis within Mid-Ohio Regional Planning Commission (MORPC) and Columbus2020 planning documents found that approximately 10,300 Knox County Residents commute to jobs outside the county. The majority of whom work in Licking and Franklin County. Those who travel north tend to work in Mansfield and Wooster. The majority of those who commute into Knox County work in manufacturing. Manufacturing is concentrated in Mount Vernon. The largest employers in Knox County are also in Mount Vernon.

Among the most common job types in Knox County with the best pay, postsecondary teachers top the list with nearly 500 employed at an average annual wage over \$77,000. Over 400 registered nurses average over \$64,000 annually. Elementary and middle school teachers average nearly \$55,000 per year among the 440 counted in a study by Celmar in 2017². Seven of the top ten most common jobs in Knox County, paid wages less than 150 percent of the federal poverty threshold.

² Turnover Basics and Wage Survey Trend Review. Bethany Celmar PHR. Referenced in The Knox County Comprehensive Plan 2018 Update

Housing Analysis

Through October of 2019, 22 homes were sold in Centerburg at an average value exceeding \$171,000. According to Zillow, the sales include newer homes on Fieldcrest and Waters Edge in the north and newer subdivision within the village where homes have 3, 4, and 5 bedrooms and at least 2.5 bathrooms. The average sales value for the 15 homes sold in 2018 was \$163,000. Reviewing the Zillow account of home sales in 2018 indicates that a sizable portion of property transfers included homes in the older section of the village. The three property transfers under \$40,000 in 2016 and again in 2017 kept the average sales prices for both years under \$100,000. There is a pronounced upward trend in the average sale value of homes sold in Centerburg. Historic homes have a certain appeal but may not have the bedrooms or amenities common in contemporary construction.

In Centerburg Village, 57 homes have been sold since 2016. Sales as recorded with the Knox County Auditor are summarized in the table below. Two of the three homes listed on Zillow in the summer of 2019 exceeded the average sales value for the year to date. Nearly 500 parcels are assessed as one-family dwellings on a platted lot, including the 25 Heart of Ohio homes on the north side of the village owned by Kno-Ho-Co Affordable Housing LLC. These three- and four-bedroom homes have attached garages and rent from mid-500s to under 700 dollars per month to qualified families.

Centerburg is on the southwest quadrant of Knox County. If metropolitan Columbus continues to expand outwards, Centerburg is the first place new residents may look for a home in Knox County. There are few homes listed on the market currently in the village. Of the homes on the market, those in Centerburg sell in about one month, faster than homes in other villages. Centerburg has a charming center built around the turn of the Twentieth Century and includes a fair representation of home styles through today's suburban home models. The historic nature of the village may be an asset worth preserving and enhancing while the abundance of flat farmland may become the homes of tomorrow.

	count	Price (average)	Square Feet (average)	Number of Bedrooms (average)	Number of Bathroom (average)	Days on Market (average)	Price per Square Foot (average)	Year Built (average)	Acres (average)
Centerburg	2	\$144,450.00	2,128.00	4.00	2.00	62.50	\$71.80	1903	0.15
Danville	2	\$86,500.00	1,992.00	4.00	2.00	197.00	\$46.94	1961	0.24
Fredericktown	7	\$126,300.00	1,499.29	3.29	1.57	48.57	\$87.38	1949	0.35
Gambier	3	\$188,300.00	1,548.00	3.33	2.00	275.33	\$120.42	1969	1.29

Table 9. Homes for sale October 2019. Zillow.com

Year of Sale	Number of Sales	Average Sales Value	Average Living Area	Sales Value per Sq. Ft.
2019	22	\$171,087	1,534	112
2018	15	\$163,627	1,634	100
2017	20	\$141,684	1,524	93
2016	18	\$159,541	1,701	94
2015	29	\$146,843	1,647	89
2014	17	\$121,365	1,530	79
2013	13	\$130,466	1,530	85
2012	10	\$137,230	1,572	87
2011	15	\$88,750	1,450	61
2010	8	\$122,888	1,425	86
2009	13	\$131,531	1,612	82

Table 10. Centerburg home sales data.

Housing Units by Occupancy Status and Tenure							
		Census 2010		Census 2019		Census 2024	
Centerburg		Number	%	Number	%	Number	%
Total Housing Units		679		753		801	
Occupied		622	91.61%	699	92.83%	740	92.38%
Owner		447	65.83%	468	62.15%	503	62.80%
Renter		175	25.77%	231	30.68%	237	29.59%
Vacant		57	8.39%	54	7.17%	61	7.62%

Table 11. Housing Units by Occupancy Status and Tenure

Name/Address	Village	Total Units	Available Units	Age or Income Restrictions	Notes
Danville Commons	Danville	48	0	42 of 48 Units Income Restricted (RD 515 Subsidy)	Market-Rate: 2 BR \$550/month RD 515: Renters pay 30% of Household Income
Centerburg Court	Centerburg	36	0	no	would not disclose
Centerburg Commons	Centerburg	36	2	affordable	3-bedroom apartments \$451-\$478/month,
Heart of Ohio Homes	Centerburg	25	0	affordable	3 to 4-bedroom homes with garages \$556-\$682/ month
164 W Houck Street	Centerburg	20	0	62+, affordable	
4 Posey Drive	Fredericktown	32	0	no	2-bedrooms \$610 per month
411 Chase Ave	Gambier	24	0	affordable	5 person waiting list; 15 1-bedroom at \$400base, 8 2-bedrooms \$435
would not disclose	Gambier	2	1		\$675/month

Table 12. Limited data on apartments in Knox County from various sources including Apartments.com and interviews with property managers. Of the property managers reached and willing to provide information in the four villages and Mount Vernon, a significant portion of the properties were affordable and did not have any vacancies.

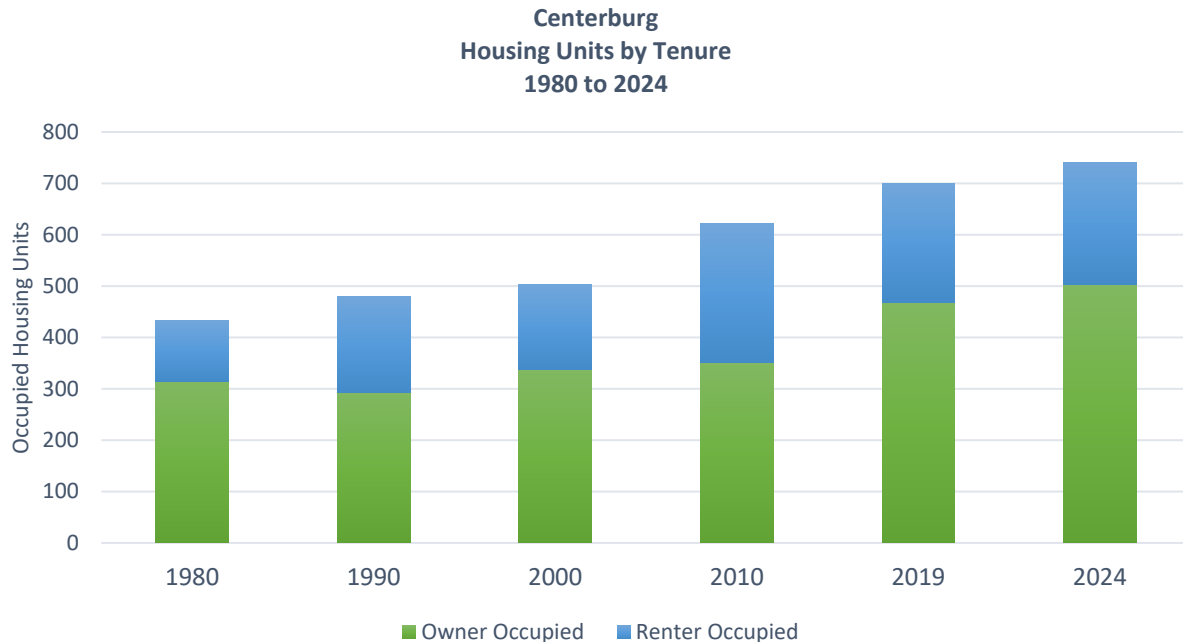


Figure 2. Historic estimate of Housing Units by Tenure in Centerburg.

In the past 10 years, 55 new housing units were constructed (assessor), predominantly within the Centerburg Meadows and Hearts of Ohio subdivisions. The Housing Units by Tenure chart illustrates the percent housing units that are occupied by owners or renters. The chart also shows the over all increase in housing stock between 1980 and 2024. For context, Centerburg Court was built in 1999, Centerburg Place in 2000, Centerburg Pointe in 2008, and the Heart of Ohio homes in 2010.

Centerburg Court Apartments are adjacent to and managed by the same company as the Heart of Ohio homes. This affordable rental option includes 3-bedroom apartments for under \$500 per month. Centerburg Place on the Columbus side of town near contemporary retail options is an option for seniors 62 years of age on a fixed income.

Market-rate rental housing within the study area includes Centerburg Commons apartment community off Cleveland Avenue and townhome style products along Poplar Alley. A one-bedroom apartment rents for around \$500 to \$550 per month according to an owner of a dozen scattered apartments in Centerburg. American Community Survey (ACS) data estimates for Centerburg support the rent ranges reported in interviews. The median contract rent for the census tract north of US Highway 36 is \$450. For the tract south of US Highway 36 the contract rent estimate is \$660 per month.

Outside of Mount Vernon, Centerburg has the most multi-family rental options in Knox County. An account of the limited data on multi-family apartment communities is provided above. Of the property managers reached and willing to provide information in the four villages and Mount Vernon, a significant portion of the properties were affordable and did not have any vacancies. Several other properties were income and age restricted. Though there was no true standard defined or extensive discussion on the topic, the properties identified as affordable set rents in the range of 30% of gross income.

Rental Housing Demand

In order to understand the future demand for rental housing in Centerburg, we first analyzed the rental housing supply and demand in Knox County. According to estimates from Esri, a third-party data provider, the number of renter occupied households in Knox County is projected to decline between 2019 and 2024 by 128 households after gaining 1,137 renter households between 2010 and 2019.

Although renter households are projected to decline overall, we anticipate demand for 323 new multi-family housing units within the next five years. In order to calculate the total units needed, we used the 2024 projected renter household figure and then added 5 percent, with the goal being a 5 percent vacancy rate needed for a balanced market. We then subtracted the existing rental units (both occupied and vacant) and any planned and proposed units. Through our research, we could identify only 16 units proposed in Mt Vernon. Finally, we estimated that around 3 percent of rental housing would need to be replaced in the next 5 years because of age and quality. This leaves us with 323 additional units needed to achieve a balanced market with a 5 percent vacancy rate.

Outside of Mt Vernon, Centerburg is in the best position to absorb some of market-rate multi-family housing demand because of its proximity to Columbus and higher incomes relative to other villages in the county. There are very few market-rate, multi-family housing options in and around Centerburg. The last market-rate apartment property was built in 1997 and is 100% occupied. Based on analysis of single-family home parcels in Centerburg that are not receiving the 2.5 percent owner-occupancy credit 44.9 percent, much of this demand is being absorbed by single-family homes being used as rental properties.

The ideal location for multi-family housing in Centerburg would be close to downtown, in close proximity to shops, services and the bike trail.

Short-Term Rental Demand Scenario	Rental Housing 5-Year Demand					
Income Range	All Incomes	< \$30K	\$30K to \$60K	\$60K to \$100K	\$100K to \$150K	\$150K and up
2019 Households	7,974	3,447	2,368	1,822	210	127
2024 Households	7,945	3,227	2,348	2,030	188	152
Rental Units Needed for Balanced Market (95% Occupied)	8,363	3,397	2,472	2,136	198	160
- Existing Occupied Rental Product (2019 Households)	7,974	3,447	2,368	1,822	210	127
- Existing Vacant Units For Rent	265	116	80	61	7	0
- Planned & Proposed Projects	16	0	0	0	0	0
+ Units Needed to Replace Obsolete Rental Housing Stock	199	105	50	38	4	1
Total Units Needed Over 5 Years	323	-61	73	291	-15	35

For-Sale Housing Demand

Based on our understanding of the housing market through data analysis and field work, we have determined the HMA for Centerburg to be Knox County. While we understand that some support for new housing will come from outside of the county, any new housing development in Gambier will draw the majority of support from within Knox County.

In the for-sale housing market, we are projecting that demand will outpace supply by 2026. This scenario assumes a 0.8 percent vacancy rate in the for-sale market (based on Census data) and that 1.0 percent of the housing stock will need to be replaced within 5 years. Based on projected owner-occupied housing growth, we anticipate that 803 available single-family homes will need to be available in Knox County. We also anticipate that 131 homes will be available as “vacant for rent” and that 162 homes will need replaced because of age and quality. Once we take all of these factors into consideration, we anticipate demand for 905 new single-family homes in Knox County by 2024.

Based on projected income by tenure trends, the demand for homes will come primarily from those households making \$100,000 to \$150,000. It is projected that these types of homeowners will continue to grow through 2026.

Looking at the 10-year growth projections, we anticipate demand for single-family housing in Knox County to be 1,690 new homes.

Short-Term For-Sale Demand Scenario	For-Sale Housing 5-Year Demand				
	All Incomes	< \$50K	\$50K to \$100K	\$100K to \$150K	\$150K and up
Income Range					
2019 Households by Income	16,023	5,817	6,243	2,592	1,371
2024 Households by Income	16,642	5,867	6,315	2,883	1,576
For-Sale Units Needed for Balanced Market (98.5% Occupied)	16,896	5,957	6,412	2,927	1,600
- Existing Occupied For-Sale Product (2019 Households)	16,023	5,817	6,243	2,592	1,371
- Existing Vacant Units For Sale	130	47	51	21	11
+ Units Needed to Replace 1% of For-Sale Housing Stock	162	59	63	26	14
Total Units Needed Over 5 Years	905	152	181	340	232

Table 13. Short-Term for-sale housing demand scenario. Urban Decision Group.

Mid-Term For-Sale Growth Scenario	For-Sale Housing 10-Year Demand (Current Trends)				
Income Range	All Incomes	< \$50K	\$50K to \$100K	\$100K to \$150K	\$150K and up
2019 Income Qualified Households	16,023	5,817	6,243	2,592	1,371
2029 Income Qualified Households	17,261	5,918	6,387	3,174	1,782
For-Sale Units Needed for Balanced Market (98.5% Occupied)	17,524	6,008	6,485	3,222	1,809
- Existing Occupied For-Sale Product	16,023	5,817	6,243	2,592	1,371
- Existing Vacant Units For Sale	134	47	51	23	13
+ Units Needed to Replace 2% of For-Sale Housing Stock	323	117	126	52	28
Total Units Needed Over 10 Years	1,690	261	317	659	453

Table 14. Mid-term for-sale housing demand scenario. Urban Decision Group.

Senior Living and Senior Care

Given the age and quality of the single-family housing stock and lack of multi-family options within the area, we anticipate demand for other housing and care options for seniors living within Knox County. Currently, the closest options for senior living and nursing care are located in Mt Vernon. The table below illustrates the options for seniors broken down by type: independent living, congregate care, assisted living and nursing care.

Independent Living/Congregate Care Facilities				
Name	Year Open/ Renovated	Total Units	Number Vacant	Occupancy Rate
Ohio Eastern Star Home	1951	12	0	100.0%
The Living Center	1963/1986	41	6	85.4%
Total		53	6	88.7%

Assisted Living Facilities				
Name	Year Open/ Renovated	Total Units	Number Vacant	Occupancy Rate
Brookdale Mount Vernon	2002	110	2	98.2%
Country Club Center II	1979	36	0	100.0%
Hamilton Assisted Living	1989/2013	19	0	100.0%

Mount Vernon Health & Rehab Center (Lower)	2007	11	0	100.0%
Mount Vernon Health & Rehab Center (Upper)	2019	11	11	0.0%
Total		187	13	93.0%

Nursing Care Facilities				
Name	Year Open/ Renovated	Total Units	Number Vacant	Occupancy Rate
Buchenwald Healthcare Neighborhood	2016	62	0	100.0%
Centerburg Pointe	2009	66	6	90.9%
Centerburg Respiratory & Specialty Rehab	1979	42	5	88.1%
Country Club Center I	1979	76	0	100.0%
Country Court	1971	92	23	75.0%
Moreland Hughes Rehabilitation Center	2002	24	4	83.3%
Mount Vernon Health & Rehab Center	2013	20	1	95.0%
The Laurels of Mount Vernon	1948/1995	104	2	98.1%
Whispering Hills Care Center	1992	36	4	88.9%
Total		522	45	91.4%

All of the independent living and assisted facilities in Knox County are located in Mount Vernon. The only two senior care facilities located outside of Mt Vernon are Centerburg Pointe and Centerburg Respiratory and Specialty Rehab.

For the purpose of forecasting demographic support, we have taken the range of the average monthly fees for the independent living and congregate care properties surveyed in Knox County.

Our calculations assume that up to 60.0% of annual household income would be directed toward these fees. Assuming a five-year stay, these fees yield total costs and required assets/income as follows:

- Independent Living - $\$1,385 \times 12 = \$16,620 / 60\% = \$27,700 \times 5 \text{ years} = \$138,500$
- Congregate Care - Low - $\$2,200 \times 12 = \$26,400 / 60\% = \$44,000 \times 5 \text{ years} = \$220,000$.
- Congregate Care - High - $\$2,650 \times 12 = \$31,800 / 60\% = \$53,000 \times 5 \text{ years} = \$265,000$.

A wide variety of other options exists for seniors of generally good health. These options include homeownership and condominium/patio homes, as well as conventional apartments. Based upon these choices, we consider capture rates ranging from 5% to 10% of income-qualified households as achievable rates. As such, a conservative 10% capture rate was used in our demand estimates.

Support calculations are summarized in the following table:

Total Support For Senior Living					
Knox County					
Base Monthly Rate	Support	X 10.0% Capture Rate	/80% (20% Support From Outside Market Area)	Competitive Units	Net Support
Independent \$1,385	$1,681 + 1,219 = 2,900$	290	363	12	351
Assisted (Low) \$3,111	$1,868 + 659 = 2,527$	253	316	187	129
Assisted (High) \$4,472	$1,699 + 383 = 2,082$	208	260	187	73
Nursing \$218*	$1,516 + 190 = 1,706$	171	213	480**	-267

*Denotes Daily Fee

**Excludes Nursing units at Centerburg Respiratory & Specialty Rehab

As illustrated by the support calculations above, Knox County could support 351 new independent living units by capturing ten percent of the income and age qualified population in the county. We believe this presents an opportunity for Centerburg given the age of the other two independent living facilities in Knox County and the anticipated support. There is also support for assisted living units in Knox County, at both the low and high ends of the monthly rate based on existing facilities.



	2003	2004	2005	2006	2007	2008	2009	2010	2011
Number built	4	11	9	11	3	3	1	0	0
Lots available	75	71	60	51	40	37	34	33	33
Absorption Rate	5.33%	15.49%	15.00%	21.57%	7.50%	8.11%	2.94%	0.00%	0.00%
Average Sales Amount of homes			\$193,900	\$193,950	\$222,900		\$171,333	\$168,000	\$143,500
Count of Sales	0	0	1	2	1	0	3	2	1

	2012	2013	2014	2015	2016	2017	2018	2019
Number built	5	0	0	1	0	9	1	0
Lots available	33	28	28	28	27	27	18	17
Absorption Rate	15.15%	0.00%	0.00%	3.57%	0.00%	33.33%	5.56%	0.00%
Average Sales Amount of homes	\$185,900	\$188,080	\$191,400	\$208,733	\$228,257	\$231,667	\$236,875	\$243,967
Count of Sales	5	5	3	6	7	3	4	9

Centerburg Meadows, adjacent to the Heart of Ohio Homes, and new multi-unit communities on the northwest side of the Village, begun in 2003. The chart above illustrates the number of homes built per year. With the Recession, development slowed to seven homes in the seven years between 2008 and 2015. Several lots have been consolidated. The typical lot size is 0.23 acres. Homes constructed between 2003 and 2018 range in size from 1,063 to 2,884 square feet. Seventy-five lots were counted between the various sections of Centerburg Meadows shown in the aerial map

above. Seventeen lots remain available after the recent uptick in activity in the subdivision. Nine homes were built in 2017. Nine homes were sold in 2019 at an average sales price of \$244,000.

Build Out Analysis



Figure 3. Vacant residential parcels in Centerburg.

There are 700 housing units within Centerburg currently. Within the existing village boundaries, up to 206 single-family units could be built to R-2 zoning district standards on the vacant residentially zoned parcels in Centerburg. The R-2 zoning district includes the older section of the village. The minimum lot size is approximately 8,000 square feet. There are few large parcels within the Village to develop or subdivide.

The large, incorporated 70-acre lot on Johnsville Road (SR-314) currently zoned and used for agricultural purposes, mathematically, could be built out in the model of the Centerburg Meadows subdivision to 250 homes.

Single-family zoning districts outside the historic core requires larger lots. We spoke with some residents in Centerburg who would prefer larger estate type lots to reflect a rural charm. Anecdotally, we see that the quarter acre (10,000 square feet) lots in Centerburg Meadows are slow to build out.

Centerburg is surrounded by flat agricultural land. This simple calculation does not consider scenarios for annexation, rezoning, or more intensive development patterns. Nor is it prescriptive. This is illustrative. And intended to establish a baseline for housing that could be accommodated within the current limits of the village.

The following page contains images from a select sample of residential buildings types in Centerburg Village.



Home for sale in Centerburg.



Home for sale in Centerburg.



Corner of Ewing and Church Streets in Centerburg.



Centerburg Point Senior Center on US Highway 36

Commercial Analysis

We identified 48 businesses located in Centerburg Village in three distinct commercial zones: Downtown, Southwest Columbus Road, and Northwest Columbus Road. In Downtown Centerburg, an area defined as the blocks to either side of Main Street between Calhoun and Ewing Streets, 29 businesses representing all industry classifications were identified. West Columbus Road where small box retailers are located, 12 businesses were identified. Another 7 businesses are scattered about the village. Charts of businesses by industry type and location illustrate the variety of businesses in Centerburg.

We spoke with representatives of 13 Centerburg businesses. The primary concerns involved parking and the number of places to eat. Business owners perceive parking to be an issue when there isn't a spot available directly out front. Centerburg business owners would like more restaurant options in the village.

Centerburg is close to Columbus and to Interstate 71. There are no highways in Knox County. A portion of State Route 13 is built to a limited access highway standard as it bypasses Fredericktown between Mansfield and Mount Vernon. The main thoroughfares in Knox County, including US Highway 36 between Mount Vernon and Sunbury through Centerburg are two lane roads with sidewalks, curbs, and on-street parking that pass-through villages. The one rail spur still active in Knox County operates between industrial districts in Mount Vernon and Newark. This has limited the commercial warehouse, manufacturing, and commercial marketability of the county, and allowed Knox County to maintain a rural character.³

In several interviews of property owners we learned that 100 of square feet rent for approximately 100 dollars per month. Built out specialized spaces with higher utility demands such as restaurants rent for more per month. On an annual fee basis, commercial spaces rent at approximately \$7/ square foot. Warehouses rent in the range of \$5/ per square foot. Data for Centerburg is limited. Many buildings are owned by the on-site business. There are not many data points for this geography.

	ANNUAL RENT/SF LOW	ANNUAL RENT/SF HIGH	ANNUAL RENT/SF MEDIAN	AVG YEAR BUILT
RETAIL	\$7	\$19.50	\$13	1980
OFFICE	\$8	\$22.00	\$12	1983

Table 15. Commercial lease rates in Knox County.

³ Foundations for the Future of Knox County. Report prepared by the Ohio State University City and Regional Planning Economic Development Studio for the Area Development Foundation of Knox County. April 2016.

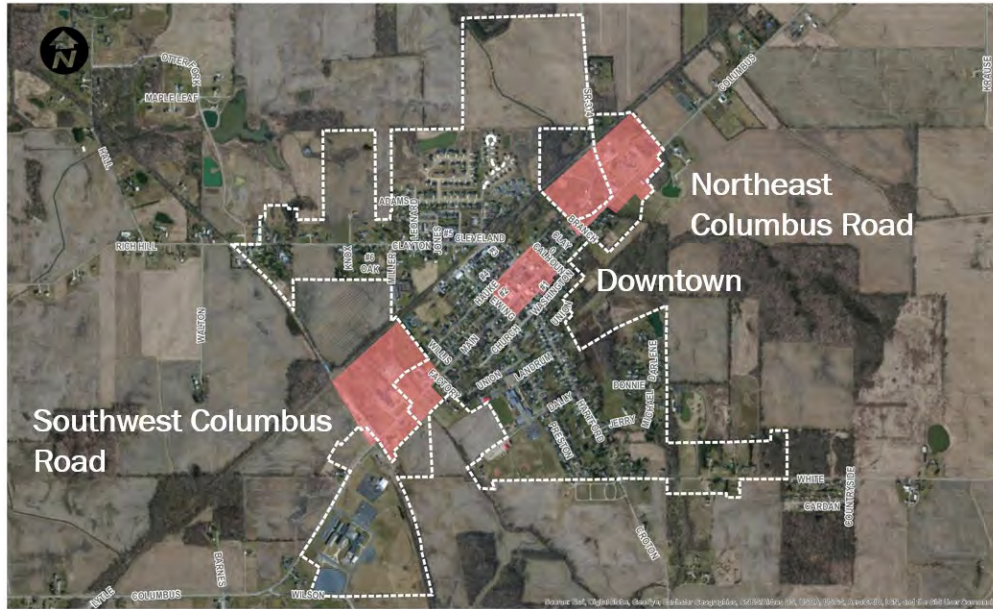


Figure 4. Commercial Business Districts in Centerburg

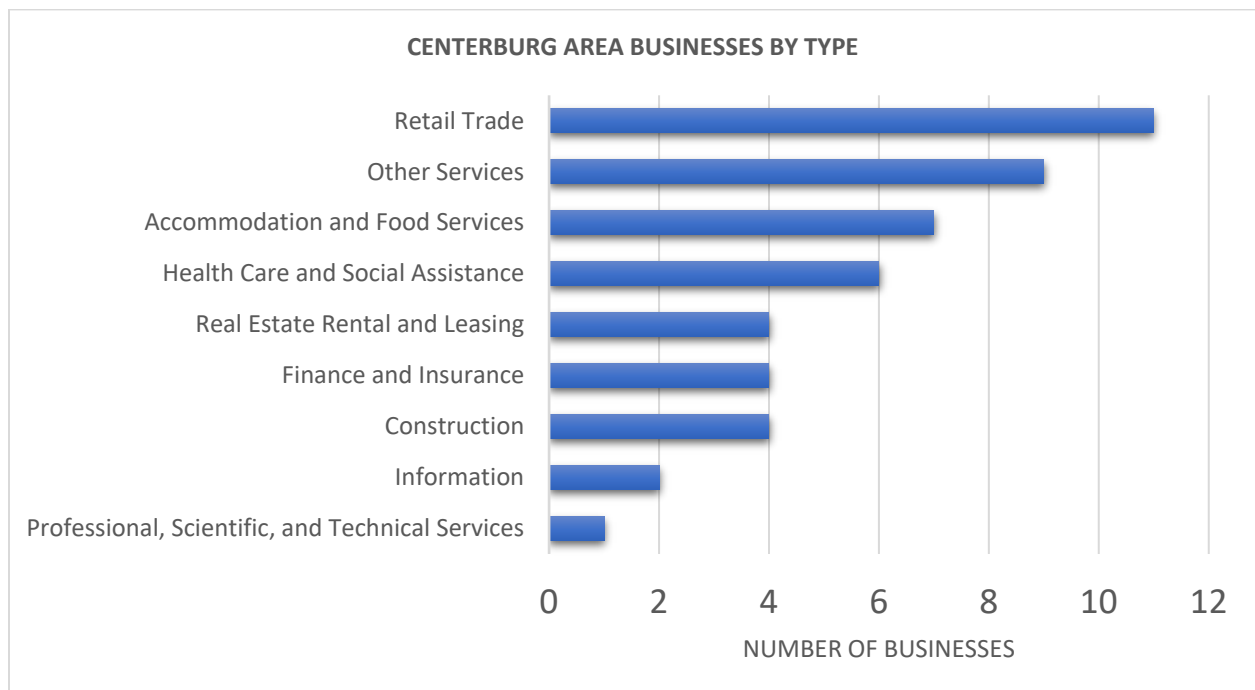


Figure 5. Mix of industries represented in Centerburg Village

There are 48 businesses, primarily retail and other services, in Centerburg. Other services category includes nail salons, pet care, auto repair, funeral home. The Southwest Columbus Zone includes parcels in the village and township for analysis purposes. The businesses within the Village limits are Dollar General, Washington Auto Parts and Paint, Twist N Shake, and Whitey's Car Wash.

Retail Overview

The Retail sector is divided into several groups or subsectors. Retail analysis usually takes the form of a supply and demand analysis. When demand exceeds supply, we refer to the market as experiencing “leakage,” which means sales are “leaking” outside of the trade area. Conversely, when supply exceeds demand, we refer to the market as having a surplus. This generally indicates that people residing outside of the trade area are absorbing the excess supply. A retail subsector experiencing leakage can indicate a market opportunity for new entrants. All retail subsectors have varying degrees of demand elasticity. In other words, consumers will travel a certain distance to procure a good or service, depending on its price and the scarcity of the good. This is best demonstrated by comparing two very different goods – grocery items and luxury goods.

Items found at a grocery are generally readily available (not scarce) and low cost. We call these low-order goods. Low order goods are *inelastic*. This means the consumer will generally travel to the closest establishment to procure the goods because differences in price among competitors is usually very small

Conversely, luxury goods are *elastic*, as those items (i.e. automobiles) are harder to find, and the scarcity usually results in higher prices. Consumers are generally willing to travel greater distances to procure a car if it means they are buying the car that they are explicitly seeking, and/or they are saving a significant amount of money by traveling the required distance to procure it.

Because goods and services have varying degrees of demand elasticity, their respective trade areas should vary accordingly. For example, the trade area for a convenience store is relatively compact – often less than five minutes in travel time. Conversely, the trade area for an automobile dealership may be as large as a one-hour drive from the dealership. In addition to demand elasticity, trade areas vary with travel friction (how easy or hard it is to get from one place to another) and the number of competitors.

Complicating matters even further is the impact of retail sales online. Although online sales currently account for less than 12 percent of all retail sales, that number is steadily increasing. Within the next five years, online sales may account for as much as 20 percent of all retail sales. Further, omnichannel sales are emerging as the platform of choice for retail sales. Omnichannel simply means a retailer is utilizing more than one channel for sales – generally a brick and mortar store with an online store.

For the purpose of simplicity, this exercise examines retail subsectors within the context of a single trade area – Centerburg Village. Assessing the degree to which retail subsectors are affected by online sales is difficult; however, low-order goods (excluding most common grocery items) are currently more susceptible to online sales while high-order goods (like automobiles) are less susceptible.

Excess grocery store demand is met by Kroger in Sunbury (15-minute drive), Johnstown (20-minute drive) and the Kroger, Walmart, and other options in Mt Vernon (20-minute drive). Excess restaurant demand is being met by Mt Vernon, Sunbury, and Columbus. The average restaurant in Knox County generates \$663K in annual sales volume. Mt Vernon is oversupplied in restaurant sales by \$26.2 million annually. Knox County is undersupplied in restaurant sales by \$9.9 million annually.

NAICS	2017 Industry Summary	Demand	Supply	Retail Gap	Leakage/ Surplus	Number of Businesses
44-45,722	Total Retail Trade and Food & Drink	\$26,316,076	\$12,536,261	\$13,779,815	35.5	17
44-45	Total Retail Trade	\$23,772,942	\$10,982,789	\$12,790,153	36.8	13
722	Total Food & Drink	\$2,543,135	\$1,553,471	\$989,664	24.2	4
2017 Industry Group						
441	Motor Vehicle & Parts Dealers	\$5,173,722	\$754,423	\$4,419,299	74.5	2
4411	Automobile Dealers	\$4,182,448	\$0	\$4,182,448	100.0	0
4412	Other Motor Vehicle Dealers	\$486,473	\$150,519	\$335,954	52.7	1
4413	Auto Parts, Accessories & Tire Stores	\$504,801	\$603,904	(\$99,103)	(8.9)	1
442	Furniture & Home Furnishings Stores	\$722,469	\$0	\$722,469	100.0	0
4421	Furniture Stores	\$440,030	\$0	\$440,030	100.0	0
4422	Home Furnishings Stores	\$282,439	\$0	\$282,439	100.0	0
443	Electronics & Appliance Stores	\$750,657	\$1,077,952	(\$327,295)	(17.9)	1
444	Bldg Materials, Garden Equip. & Supply Stores	\$1,733,860	\$402,299	\$1,331,561	62.3	2
4441	Bldg Material & Supplies Dealers	\$1,605,657	\$337,017	\$1,268,640	65.3	1
4442	Lawn & Garden Equip & Supply Stores	\$128,203	\$65,282	\$62,921	32.5	1
445	Food & Beverage Stores	\$4,057,699	\$1,024,679	\$3,033,020	59.7	1
4451	Grocery Stores	\$3,652,644	\$829,002	\$2,823,642	63.0	1
4452	Specialty Food Stores	\$229,957	\$195,677	\$34,280	8.1	1
4453	Beer, Wine & Liquor Stores	\$175,098	\$0	\$175,098	100.0	0
4,464,461	Health & Personal Care Stores	\$1,713,844	\$1,870,338	(\$156,494)	(4.4)	1
4,474,471	Gasoline Stations	\$2,687,724	\$3,529,016	(\$841,292)	(13.5)	1
448	Clothing & Clothing Accessories Stores	\$1,103,588	\$0	\$1,103,588	100.0	0
4481	Clothing Stores	\$715,650	\$0	\$715,650	100.0	0
4482	Shoe Stores	\$165,481	\$0	\$165,481	100.0	0
4483	Jewelry, Luggage & Leather Goods Stores	\$222,457	\$0	\$222,457	100.0	0
451	Sporting Goods, Hobby, Book & Music Stores	\$535,225	\$842,602	(\$307,377)	(22.3)	1
4511	Sporting Goods/Hobby/Musical Instr Stores	\$443,915	\$842,602	(\$398,687)	(31.0)	1
4512	Book, Periodical & Music Stores	\$91,309	\$0	\$91,309	100.0	0
452	General Merchandise Stores	\$3,956,025	\$781,508	\$3,174,517	67.0	1
4521	Department Stores Excluding Leased Depts.	\$2,758,858	\$0	\$2,758,858	100.0	0
4529	Other General Merchandise Stores	\$1,197,167	\$781,508	\$415,659	21.0	1
453	Miscellaneous Store Retailers	\$995,346	\$699,973	\$295,373	17.4	3
4531	Florists	\$42,601	\$0	\$42,601	100.0	0
4532	Office Supplies, Stationery & Gift Stores	\$218,103	\$198,604	\$19,499	4.7	2
4533	Used Merchandise Stores	\$139,792	\$0	\$139,792	100.0	0
4539	Other Miscellaneous Store Retailers	\$594,851	\$501,368	\$93,483	8.5	1
454	Nonstore Retailers	\$342,783	\$0	\$342,783	100.0	0
4541	Electronic Shopping & Mail-Order Houses	\$230,434	\$0	\$230,434	100.0	0
4542	Vending Machine Operators	\$36,628	\$0	\$36,628	100.0	0
4543	Direct Selling Establishments	\$75,721	\$0	\$75,721	100.0	0
722	Food Services & Drinking Places	\$2,543,135	\$1,553,471	\$989,664	24.2	4
7223	Special Food Services	\$71,702	\$0	\$71,702	100.0	0
7224	Drinking Places - Alcoholic Beverages	\$89,931	\$0	\$89,931	100.0	0
7225	Restaurants/Other Eating Places	\$2,381,502	\$1,553,471	\$828,031	21.0	4

Figure 6. Retail Supply and Demand for Centerburg.

Overall, the various retail subsectors (including food and drink) are undersupplied in the market. Demand for the majority of retail sectors (where the value in the demand column is greater than the supply column) is fulfilled outside of the bedroom village of Centerburg. In these cases, the consumers residing within Centerburg are traveling (or ordering online) outside of Centerburg to procure these goods.

Some subsectors, including Automobile Dealers, Furniture Stores, Clothing Stores, and Specialty Food and Drinking Places are not represented in Centerburg, according to data aggregated on a national scale in 2017. The population size of Centerburg and proximity to shopping districts in Columbus may continue to require villagers to go out of town for inelastic goods. There is opportunity in the Food Services and Drinking Places with demand undersupplied by nearly \$1 Million.

Secondary Market Area Retail Analysis

In order to account for the demand for retail goods within the immediate area surrounding Centerburg we examined supply and demands factors within a secondary market area – a 15-minute drive time from the grocery store adjacent to the village (Home Town Market). Centerburg is 30 minutes from Mount Vernon where a variety of grocery stores including Walmart and Kroger are located. The 15-minute market area for the Kroger in Sunbury to the west reaches Centerburg, as does the 15-minute market area for the Kroger in Johnstown to the south.

The following map illustrates the nearest options for full-service groceries. Mount Vernon is centrally located within Knox County and has more options. Sunbury is on route to I-71, places of work, and wider retail options in Franklin County.

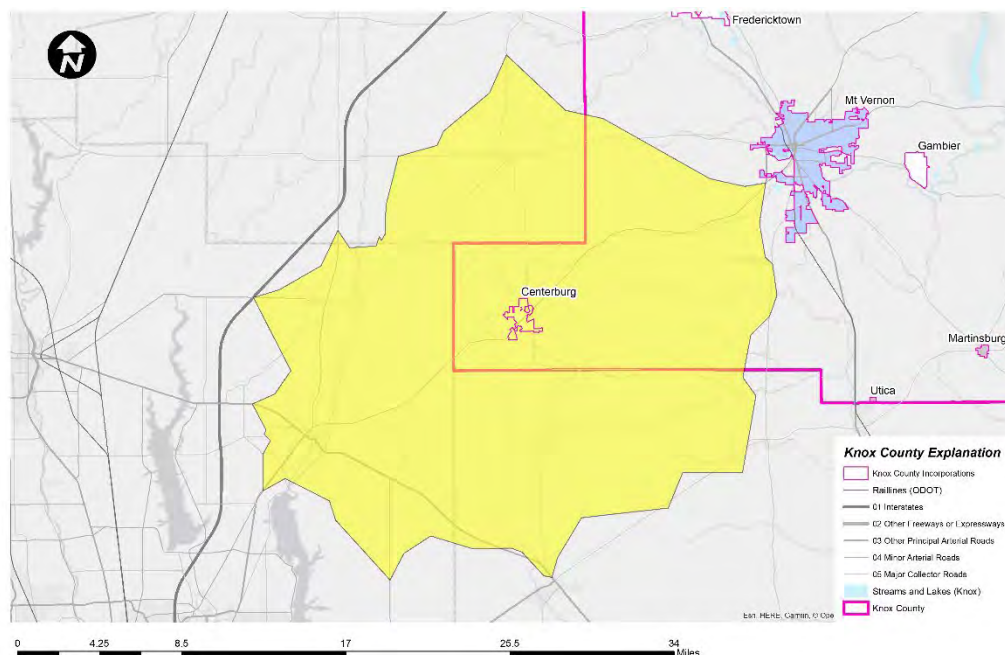


Figure 7. Location of major grocery stores in the region and their market areas as defined by 15 minute drivetimes.

NAICS	2017 Industry Summary	Demand	Supply	Retail Gap	Leakage/ Surplus	Number of Businesses
44-45,722	Total Retail Trade and Food & Drink	\$430,237,678	\$221,817,138	\$208,420,540	32.0	131
44-45	Total Retail Trade	\$388,622,824	\$197,693,673	\$190,929,151	32.6	94
722	Total Food & Drink	\$41,614,854	\$24,123,465	\$17,491,389	26.6	37
2017 Industry Group						
441	Motor Vehicle & Parts Dealers	\$83,351,264	\$15,083,014	\$68,268,250	69.4	10
4411	Automobile Dealers	\$67,031,201	\$3,519,414	\$63,511,787	90.0	1
4412	Other Motor Vehicle Dealers	\$7,960,014	\$1,285,195	\$6,674,819	72.2	2
4413	Auto Parts, Accessories & Tire Stores	\$8,360,049	\$10,278,405	(\$1,918,356)	(10.3)	7
442	Furniture & Home Furnishings Stores	\$11,732,841	\$2,417,018	\$9,315,823	65.8	5
4421	Furniture Stores	\$7,036,304	\$1,440,150	\$5,596,154	66.0	3
4422	Home Furnishings Stores	\$4,696,538	\$976,868	\$3,719,670	65.6	2
443	Electronics & Appliance Stores	\$12,346,081	\$2,224,093	\$10,121,988	69.5	2
444	Bldg Materials, Garden Equip. & Supply Stores	\$29,150,754	\$18,544,570	\$10,606,184	22.2	18
4441	Bldg Material & Supplies Dealers	\$26,784,425	\$17,225,850	\$9,558,575	21.7	13
4442	Lawn & Garden Equip & Supply Stores	\$2,366,329	\$1,318,720	\$1,047,609	28.4	5
445	Food & Beverage Stores	\$66,428,190	\$65,437,668	\$990,522	0.8	10
4451	Grocery Stores	\$59,738,541	\$63,931,519	(\$4,192,978)	(3.4)	7
4452	Specialty Food Stores	\$3,747,927	\$879,600	\$2,868,327	62.0	3
4453	Beer, Wine & Liquor Stores	\$2,941,722	\$0	\$2,941,722	100.0	0
4,464,461	Health & Personal Care Stores	\$28,337,291	\$20,306,507	\$8,030,784	16.5	5
4,474,471	Gasoline Stations	\$42,840,734	\$44,019,094	(\$1,178,360)	(1.4)	6
448	Clothing & Clothing Accessories Stores	\$18,369,351	\$11,948,654	\$6,420,697	21.2	8
4481	Clothing Stores	\$11,833,708	\$7,061,741	\$4,771,967	25.3	4
4482	Shoe Stores	\$2,664,874	\$4,645,148	(\$1,980,274)	(27.1)	3
4483	Jewelry, Luggage & Leather Goods Stores	\$3,870,769	\$0	\$3,870,769	100.0	0
451	Sporting Goods, Hobby, Book & Music Stores	\$8,871,547	\$3,264,013	\$5,607,534	46.2	9
4511	Sporting Goods/Hobby/Musical Instr Stores	\$7,376,050	\$3,234,920	\$4,141,130	39.0	8
4512	Book, Periodical & Music Stores	\$1,495,498	\$0	\$1,495,498	100.0	0
452	General Merchandise Stores	\$64,878,419	\$2,070,372	\$62,808,047	93.8	2
4521	Department Stores Excluding Leased Depts.	\$45,362,505	\$0	\$45,362,505	100.0	0
4529	Other General Merchandise Stores	\$19,515,914	\$1,964,159	\$17,551,755	81.7	2
453	Miscellaneous Store Retailers	\$16,323,368	\$8,411,513	\$7,911,855	32.0	17
4531	Florists	\$794,969	\$116,996	\$677,973	74.3	1
4532	Office Supplies, Stationery & Gift Stores	\$3,570,672	\$384,584	\$3,186,088	80.6	4
4533	Used Merchandise Stores	\$2,289,057	\$1,323,560	\$965,497	26.7	4
4539	Other Miscellaneous Store Retailers	\$9,668,669	\$6,586,374	\$3,082,295	19.0	9
454	Nonstore Retailers	\$5,992,984	\$3,967,157	\$2,025,827	20.3	2
4541	Electronic Shopping & Mail-Order Houses	\$3,818,379	\$2,599,031	\$1,219,348	19.0	1
4542	Vending Machine Operators	\$598,720	\$0	\$598,720	100.0	0
4543	Direct Selling Establishments	\$1,575,885	\$1,341,288	\$234,597	8.0	1
722	Food Services & Drinking Places	\$41,614,854	\$24,123,465	\$17,491,389	26.6	37
7223	Special Food Services	\$1,202,735	\$214,306	\$988,429	69.8	1
7224	Drinking Places - Alcoholic Beverages	\$1,527,986	\$177,883	\$1,350,103	79.1	1
7225	Restaurants/Other Eating Places	\$38,884,133	\$23,731,276	\$15,152,857	24.2	35

Figure 8. Retail Supply and Demand within 15 minutes of Home Town Market located in Centeburg.

Downtown Centerburg

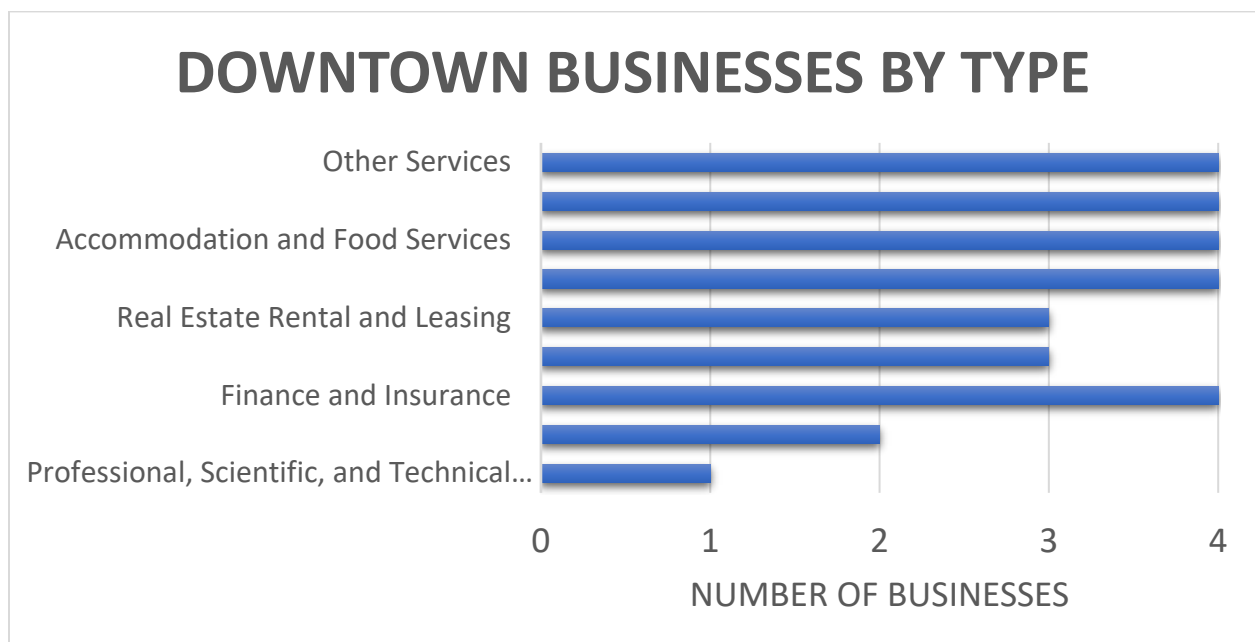


Figure 9. Mix of industries represented in downtown section of Centerburg Village

Downtown Centerburg is located on Columbus Road, or Main Street, and is the traditional center of the Village. The old mill is located along the former railroad corridor to the north side of Main Street. Downtown is several blocks deep by several blocks wide. Properties located off Main Street suffer from a lack of visibility. The Downtown is extremely walkable. Crosswalks and signage may help to overcome perceived parking and visibility issues.

Two restaurants opened within the past year (The Burg, Midway 1834 Village Tavern), while two restaurants closed within the past few years (Kristi's Bakery, InTown Restaurant). Still, of those surveyed, Downtown workers would like more variety among restaurants. Some businesses attract customers from a 25-30 Mile Radius. Several business owners with only on-street parking expressed concern over a shortage of parking. We did not observe a shortage of parking in the Downtown district.







There are two vacant buildings – one is a village-owned property on Hartford Avenue – and one is the recently demolished structure adjacent to it. There is also one property with a for-lease sign at 15 West Main (Adjacent to 4 Seasons Air) and two more spaces that appear vacant on Main Street. Potential uses for village-owned property include open space, parking short term; multi-family/mixed use long term.

The “Brown Building” adjacent to First Knox National Bank, with 1,976 square feet ground floor retail, 2,800 sf residential above, has been vacant for at least 10 years. This is a potential use case for a vacant property registration ordinance, similar to the ordinance recently established in Mt Vernon.

COMMERCIAL ZONE	COMMERCIAL SQ FT	VACANT SQ FT	VACANT %	UNDEVELOPED ACREAGE
Downtown	77,335	9,781	12.6%	0
Southwest Columbus Road	42,291	0	0.0%	8.9
Northeast Columbus Road	8,710	0	0.0%	5.4

Southwest Columbus Road

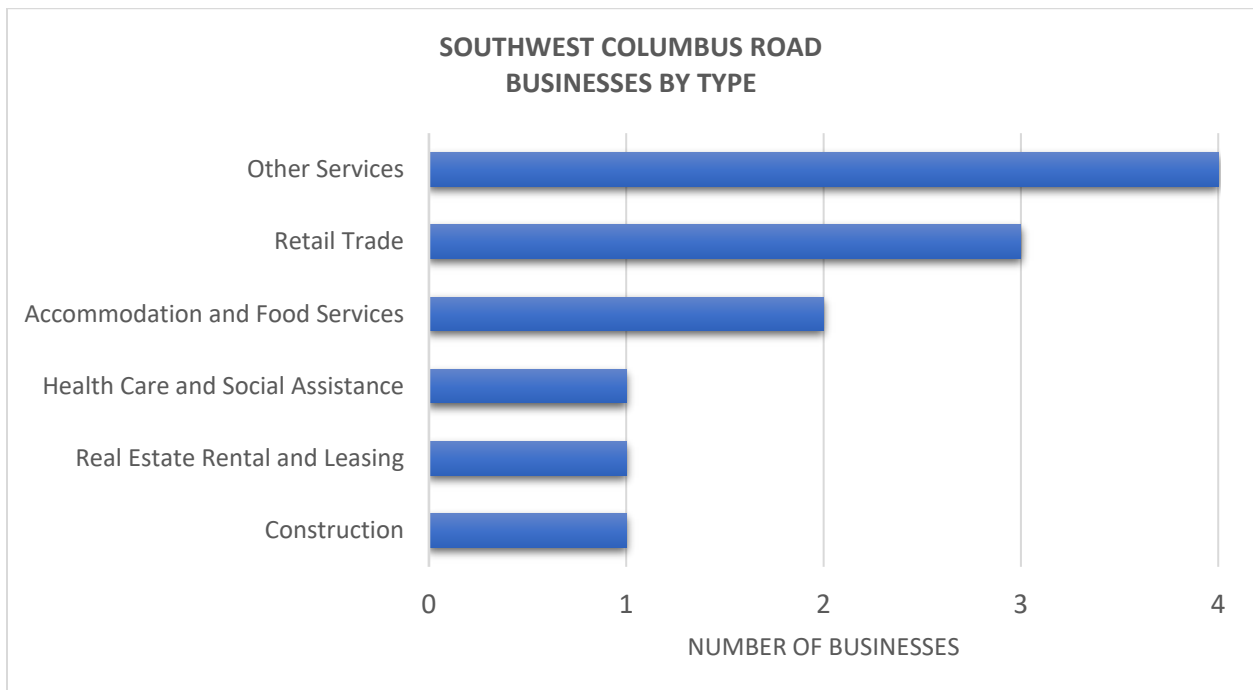
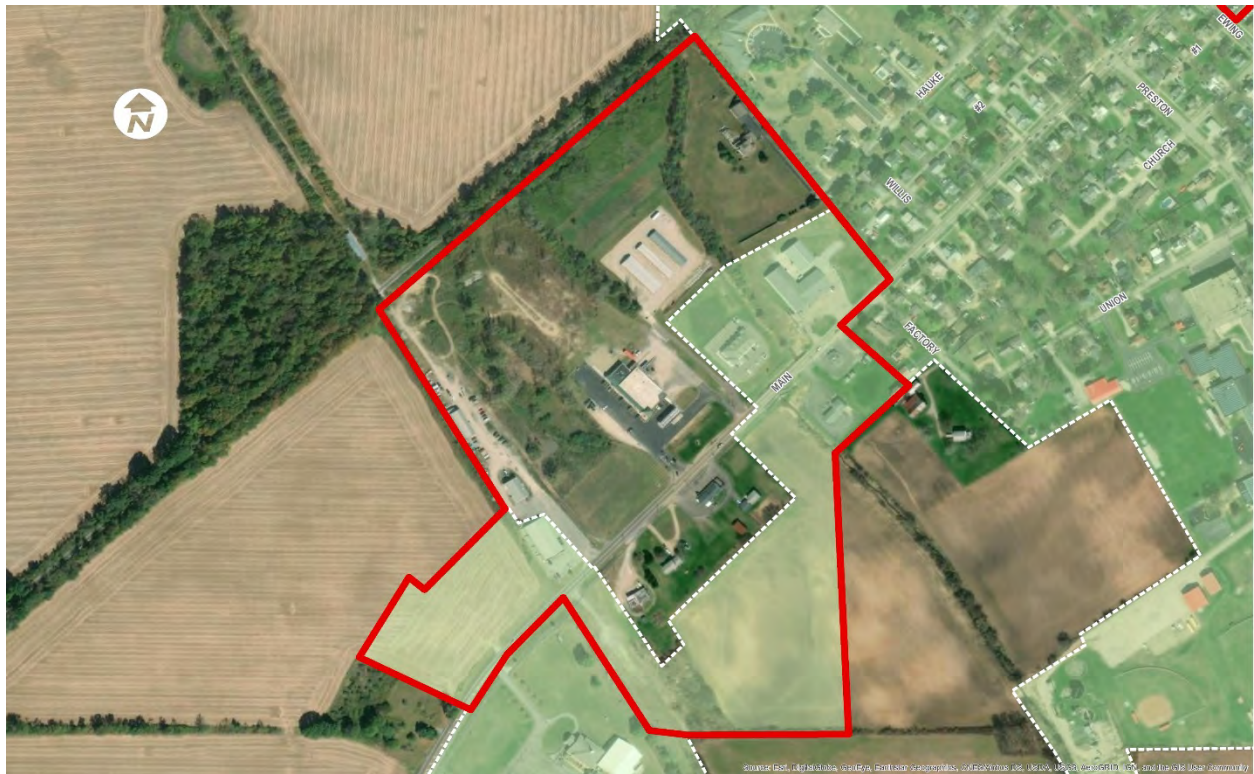


Figure 10. Mix of industries represented in the Southwest Columbus Road section of Centerburg Village



The Southwest Columbus Road commercial zone includes areas in and out of Centerburg incorporated boundaries including the grocery store (Village boundaries are shaded in green). No distinction between Village/Township Property. Hometown Market is outside of the village boundary. Dollar General is inside Centerburg.

Hometown Market is attempting to draw people in through events, wine tasting, and food trucks. Centerburg Dental Care is adding more operating chairs due to demand. The high school is located just south and west of this commercial zone. The Southwest Columbus Road zone is an auto-oriented area. The Heart of Ohio trail parallels Columbus Road. Future trails may increase the opportunities to travel through the zone. The developable land currently zoned commercial in the Southwest Columbus section totals 8.9 Acres. Potential uses for this area include senior living, restaurant, and retail establishments.

Northwest Columbus Road



The Northwest Columbus Road zone includes Memorial Park which is in the township. Developable parcels adjacent to the pharmacy are currently zoned Open Space. With a zoning change, potential uses may include Medical Office.

Recreation and Tourism

Many of the recreational and cultural assets in Knox County are located to the north of and along the Kokosing River. Centerburg neighborhoods have a traditional Nineteenth Century feel. The landscape is generally flat and agricultural in nature. Centerburg is located nearest to the northern suburbs of Columbus. A cyclist could reach Pizza Burg, adjacent to the Heart of Ohio Trail in approximately two hours, or 22 miles, from Westerville. A trip from downtown Columbus to Centerburg and back would require a commitment of most of a day. The one-way estimated trip time is 3 1/2 hours.

The Industrial Heartland Trail Coalition⁴ developed a tourism strategy based on research involving state, local, and trail users in their network areas such as Cleveland and Pittsburg. The Coalition recommends states dedicate more funding to tourism and completing the trail network. Users and local officials emphasized the experiences and attractions along the route that capture the distinctiveness of the region. The report called attention to the industrial history, Underground Railroad tours, Native American history, agricultural tours, breweries, crafts, and the specific natural beauty of the region that could be explored through walking tours or while on route.

Self-selected survey respondents (majority male, age 46 to 65, and weekly trail users) preferred camping followed by hotels and bed and breakfasts for over-night trips. The nearest campground in the region is in Fredericktown which is off route. The nearest hotels and bed and breakfasts were found in Mount Vernon. No lodging was identified in Centerburg on several windshield surveys of the Village. No results were returned in online searches for hotels, campgrounds, or bed and breakfasts. A wide variety of lodging is available in the Columbus metropolitan region. Auto and cycling tourists alike may opt to continue through Centerburg for the full service hotels in larger cities close to other amenities. At the same time, the unique character and location may make it an attractive or necessary location to stay for an evening. A formal lodge or airbnb presence could connect Centerburg to active, outdoor enthusiasts.

⁴ Industrial Heartland Trails Coalition. I Heart Trails Tourism Strategy. January 2016.

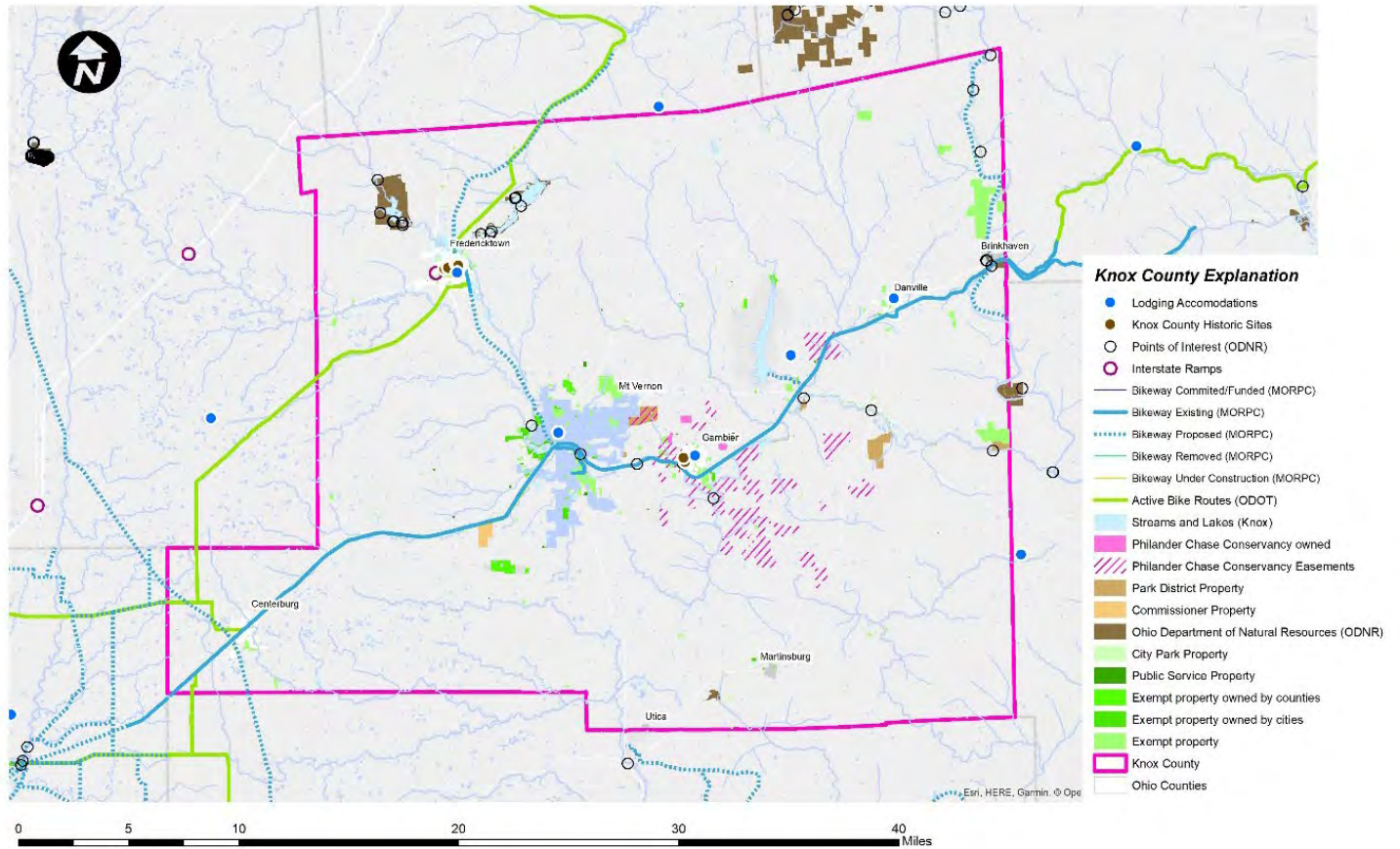


Figure 11. Map of recreational and cultural assets in Knox County with lodging options and multiuse trail routes.

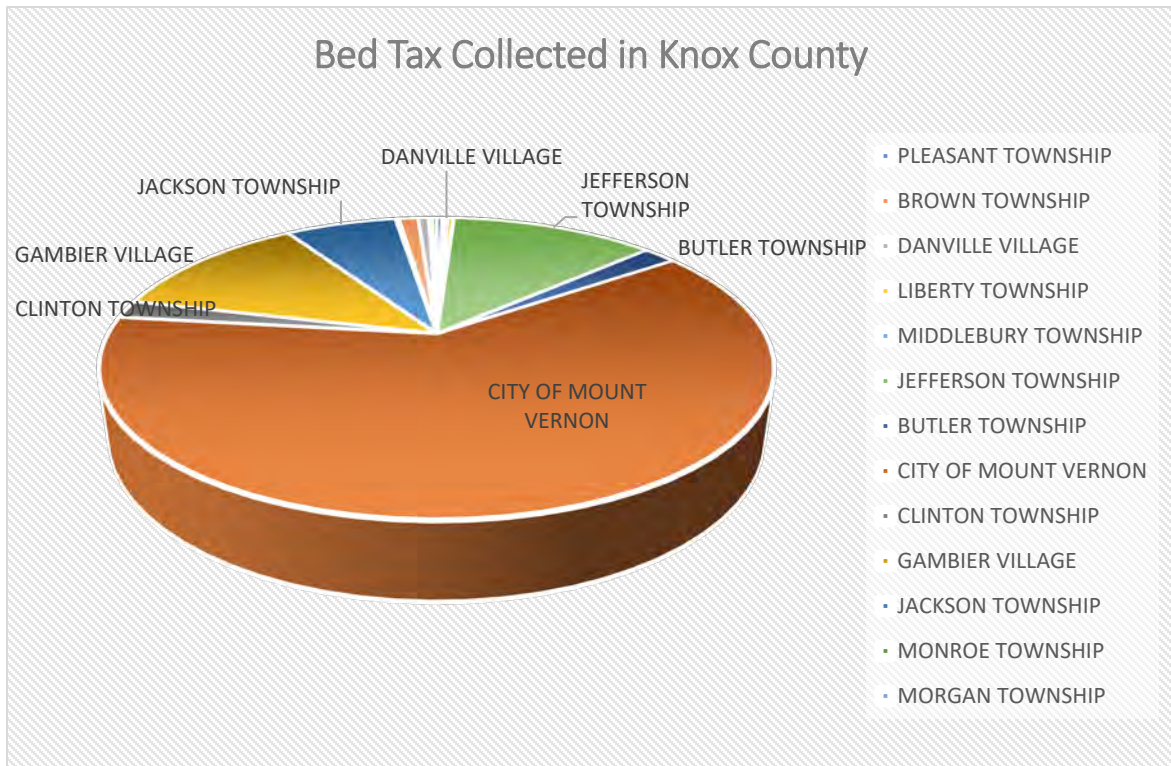


Figure 12. Bed Tax Revenue collected in August 2018 to August 2019 in Knox County by incorporated place or township. Revenue is aggregated by month by jurisdiction. This chart illustrates in relative terms where people stayed in Knox County in a 12-month period. Knox County Convention and Visitors Bureau.

Type	count	Weekday rate	Weekend rate
BNB	11	\$110.17	\$131.00
Lodge	2	N/A	N/A
Motel	2	\$67.50	\$72.00
Hotel	7	\$134.86	\$161.71
Campground	4	\$42.25	\$42.25
Cabin	6	N/A	N/A
Cottage	1	N/A	N/A
AirBNB House	1	\$99.00	\$99.00

Figure 13. Lodging accommodations in Knox County with average weekday and weekend rates where available.

The Industrial Heartland Trail Coalition survey found that long distance (multi-day) cyclists likely bike two days on a single trail or visit multiple trails in hub-and-spoke fashion. Regional day-trippers and local trail users spend less than overnight visitors. The services and amenities respondents desired included restaurants and public restrooms/water. Those looking for food options seek out locally sourced and regionally favored foods. Convenience stores and bike shops were noted though trail users may be more likely to seek out a local brewery than the essentials.

The newly designated cross country Great American Rail Trail from the District of Columbia to Washington State would follow the Heart of Ohio Trail through Centerburg to the Ohio to Erie Trail through Downtown Columbus, Ohio. The trail is a new way to see the country and may attract tourists to shops, restaurants, and lodges along the way. Centerburg is the midway point between Mount Vernon and Sunbury and may be a good location for regional cyclists to stop for a moment for a meal or refreshments.

The Mon River Trail System in West Virginia links a series of “trail towns” that supports hikers with services, promotes the trail to its citizens, and embraces the trail as a resource to be protected and celebrated. Trail Towns are built on a relationship between a town, the trail, and its volunteers.⁵

With the Knox County Comprehensive Plan focus on building up existing communities through the planning principle guidelines to ensure responsible growth and preserve environmental character, Villages may enjoy continued distinct identities. The spatial separation protected by the comprehensive plan⁶ reinforces the attractiveness of the trail for the recreational cyclist looking for an escape into the rural Heart of Ohio.

Parkersburg, Fairmont, and Morgantown along the Parkersburg to Pittsburg (P2P) trail corridor in West Virginia have adopted comprehensive plans that recognize existing trails as tourist attractions.⁷ The trails are the backbone of their shared-use path network which advances quality-of-life, transportation, recreation, and economic development objectives for those in each city. The Parkersburg Plan (2011) goes a step further in recommending bicycle and pedestrian facilities for all new and redevelopment projects.

The Mid-Ohio Regional Planning Commission (MORPC) has proposed a greenway trail between Johnstown in Licking County to the south and Mount Gilead in Morrow County to the north. The trail would follow a corridor that resembles a former rail corridor past the Centerburg High School, the Dollar General, before intersecting the Heart of Ohio trail and an Ohio Department of Transportation (ODOT) Active Bike Route on Hall Road. The trail would cross US Highway 36, or Columbus Road, at the gateway to Centerburg. If this trail is built and intersection improvements include slowing and stopping drivers on US Highway 36 are constructed, new options for travel through the Village may develop.

The Knox County Convention and Visitors Bureau estimates the total impact of tourism on the county to generate \$94 Million in sales which employees over 1,500 (5.8 percent in private sector employment) who earned over \$33 Million in 2017.⁸ Tax revenues associated with tourism is

⁵ North Country Trail Association.

⁶ Knox County Comprehensive Plan 2018 Update.

⁷ Connecting Parkersburg to Pittsburg by Rail-Trail – Bringing a world-class trail network to West Virginia. A rail-trail feasibility study of the Industrial Heartland Trails Coalition’s Parkersburg to Pittsburg Corridor. Published April 24, 2018.

⁸ The Economic Impact of Tourism in Knox County, Ohio by Tourism Economics, prepared for the Knox County Convention and Visitors Bureau. June 2018.

estimated to exceed \$12 Million according to a report from 2018. Of the \$60.5 Million in direct sales in Knox County in 2017, approximately one third went to retail trade where over 200 were employed and another third to food and beverage sector where over 500 were employed. The report asserts that tourism supports 1 in every 17 jobs in Knox County.

More information on the trails in Centerburg may be found at <https://knoxcountyparks.org/> and <http://www.railstotrails.org/greatamericanrailtrail/>

Taking steps to prepare is the first item the Village can undertake to prepare for tourism surrounding cycling. Others may, with or without, incentives and encouragement establish group rides or bed and breakfasts based in Centerburg. The regional trail network requires many actors to expand and maintain. Readiness is key.

We recommend installing wayfinding signage at the edges of the village along the Heart of Ohio Trail to direct recreational cyclists to downtown eateries and the grocery store. Ideally a highly visible and physically separated bike trail could be constructed from the trail and circulate through the village. Low cost and low stress solutions should be evaluated to allow cyclists to confidently leave the main trail to explore and spend money in Centerburg.

Cyclists are self-sufficient. A restroom, drinking water, and a secure, robust, purpose-built bike rack at the main entrance of a place to rest suits most. Well-marked, well lighted, visible, sheltered, and secure bike parking at local eateries and the grocery store could establish a cultural identity around cycling for the village. A unified wayfinding plan that includes signs on US Highway 36 may encourage car commuters to experience the trail and local businesses. A gateway concept at the western edge of the Village where the proposed trail would cross US Highway 36 may enhance the visible of Centerburg and the attractiveness of cycling within the community in a signature project.

To develop tourism around the trail, we recommend establishing a bed and breakfast in the traditional center of the village that takes advantage of proximity to the trail. Candidate sites that may appeal to travelers looking to experience Centerburg include historic homes, the second stories of downtown storefronts, or even a novel adaptation of the grain silos for lodging. Connecting local leadership with regional and national cycling coalitions may inform the feasibility analysis and strategies Centerburg pursues. The Knox County Convention and Visitors Bureau and Parks Commission will be integral to the success of the trail.

In addition to developing a culture around cycling, Centerburg should promote its downtown and historic neighborhoods.



Pizza Burg, located in the Mill once served by the rail line now fronts the Heart of Ohio Trail.



Asphalt trail parallel to US Highway 36 connects the high school on the southwestern outskirts of the village to the sidewalk in the traditional center. A proposed multi-use trail would cross Main Street here and continue past the former passenger rail station



Multi-use facilities in Hillair Township Memorial Park between the Heart of Ohio Trail and Main Street.

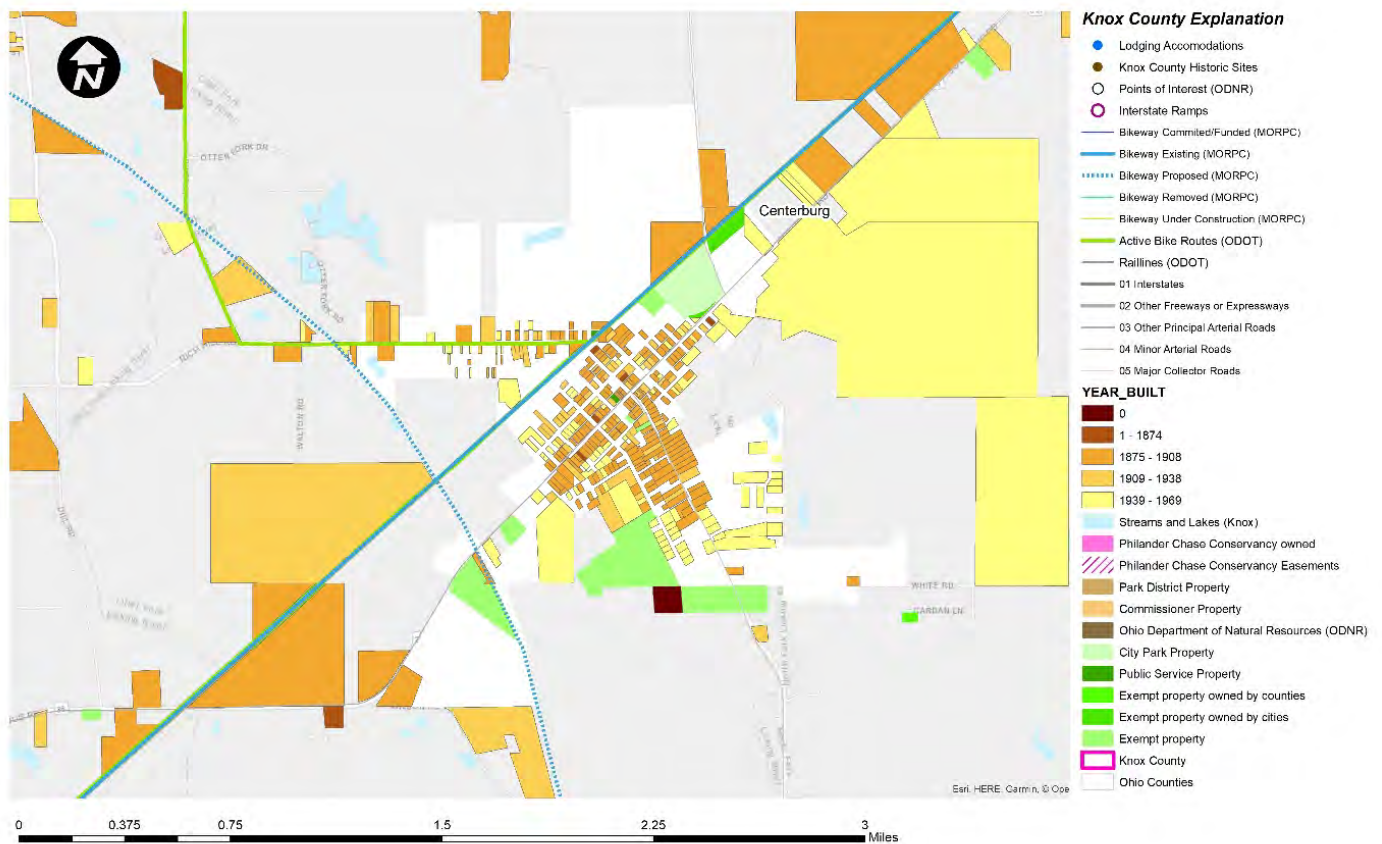


Figure 14. Trails (blue and green lines) and public use property (green polygons) in Centerburg are shown with properties old enough to be considered historic (orange and yellow polygons). Where the dashed blue line crosses US Highway 36 is an opportunity to create a gateway and enhance bicycle/pedestrian safety and comfort in Centerburg. Gateway to Centerburg pictured below.

