

*Executive Summary*  
*Lower Broadway Retail Scan*

*November 2009*

*Prepared by:*



*For:*

**La Casa de Don Pedro**

*& Lower Broadway Steering Committee*

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# ***EXECUTIVE SUMMARY***

## *Lower Broadway Retail Scan*

### **I. INTRODUCTION**

In the spring of 2009, *La Casa de Don Pedro* retained *LISC MetroEdge (LME)* to assess the potential for commercial revitalization in the Lower Broadway commercial district and to suggest initial steps for taking advantage of opportunities revealed in the market assessment. In retaining *LISC MetroEdge*, *La Casa de Don Pedro* took on the responsibility as lead partner to orchestrate broad participation by a variety of interested parties so as to provide input in assessing the neighborhood market. To facilitate this initiative a project steering committee was created to assist the development of the assessment and to spearhead implementation strategies developed during the market assessment.

**La Casa de Don Pedro (La Casa)** is a 37 year community based development corporation that is focused on providing an array of supportive social services and community economic development programs that promote family well-being, healthy child development, educational achievement, employment opportunities, home-ownership, financial self-sufficiency, energy conservation, and neighborhood renewal. *La Casa's* traditional service area is the north end of Newark. The Lower Broadway community has been the focus of a Community Plan and serves as a primary base of operation of many of *La Casa's* programs.

**LISC MetroEdge (LME)** is a market research and consulting unit within the Local Initiative Support Corporation, the nation's largest community development intermediary. *LME* supports commercial district revitalization efforts in under-invested and emerging market neighborhoods in the United States by spotlighting their hidden retail profitability. *LME* combines quantitative analysis of both national and local market data with expert knowledge of retail and related commercial development to help communities reveal and highlight neighborhood assets and market opportunities. This market data then becomes an integral part of a participatory community process that engages local stakeholders in the interpretation of market data and the development of clearly defined, market-informed strategies for commercial revitalization.

## **Scope of Work**

During the spring and summer of 2009, LME worked with La Casa de Don Pedro and a steering committee of stakeholders (including neighborhood residents, merchants, members of Newark City Council, Newark UEZ, Newark Police Department and funding partners) to assess the neighborhood market and set discrete goals for the commercial district revitalization effort. A defined trade area was identified, correlating to the catchment areas of a Lower Broadway “convenience retail” market. The assessment also included over a dozen individual interviews with businesses owners, three roundtable discussions with both merchants and consumers, and driving and walking tours of the neighborhood to assess paths of transit and the relationship of business in the neighborhood to each other and to the competition. The LME work was divided into three distinct phases as follows:

*Phase I:* Phase I data collection included national demographic and market data provided by Claritas. Claritas is the nation’s leading data service provider and is overwhelmingly used by retailers in their site selection decisions. LME analysts also looked at housing investment and new homeowner purchases (through Home Mortgage Disclosure Act data) to round out of view of changing community dynamics often missed by other market analysis firms.

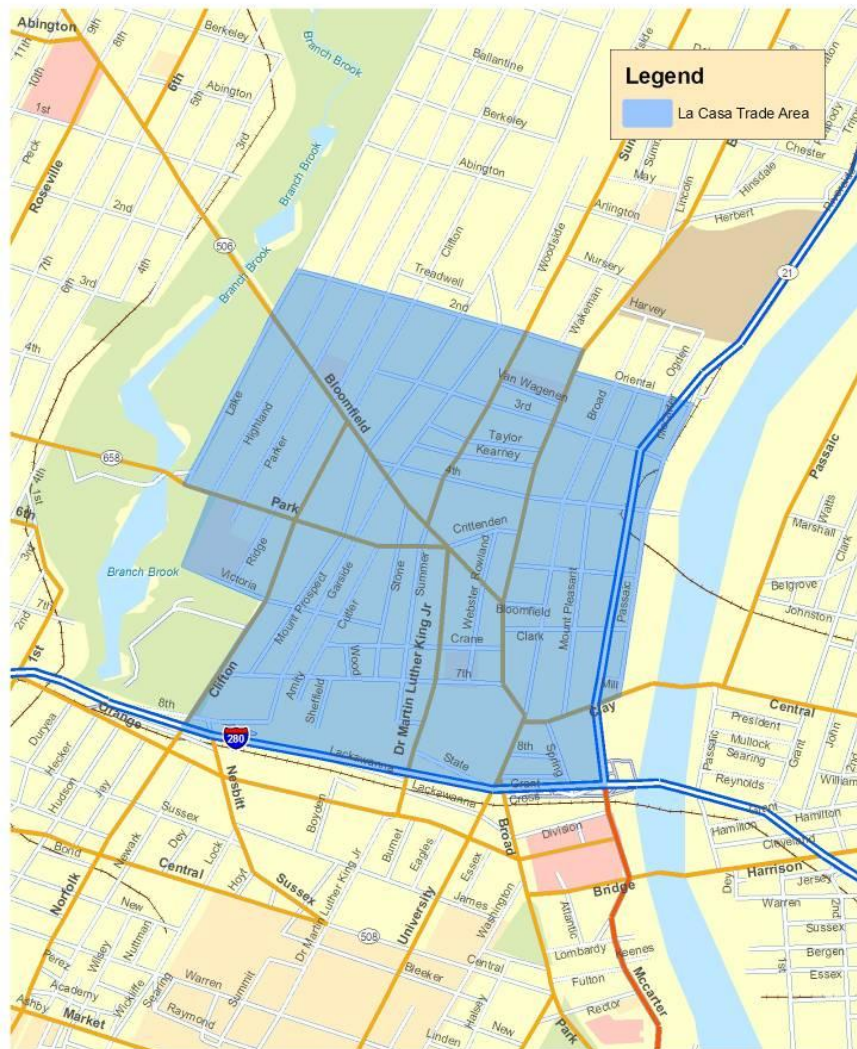
*Phase II:* During Phase II, LME incorporated significant local data (including traffic counts, proposed public investments, business mix, etc) with in-depth input from district customers (both residents and non-resident consumers) and merchants. This qualitative data helped to further verify and substantiate Phase I market data. It also forms the basis for a set of more strategies and recommendations (as incorporated in the work plan in Appendix A) that reflect priorities as identified by both customers and merchants. Phase II is also where community engagement—through the participation of key community stakeholders—becomes critical. The LME process incorporated the input of a diverse and representative local stakeholder group to review the study findings and use the data to develop and formulate action steps that will further establish the Lower Broadway commercial district as a shopping destination of choice for both local and regional customers.

*Phase III:* During Phase III, LME worked to incorporate the recommendations from the steering committee into a final presentation and executive summary that includes key data findings, strategy recommendations and a preliminary work plan.

### **Trade Area Overview**

The trade area boundaries were created to scan ‘Convenience Retail’ needs. Convenience Retail typically includes “Saturday morning” shopping needs such as pharmacies, grocery stores, dry cleaners, auto parts or hardware stores. Customers typically prefer to find these goods and services within walking or short driving distance of their home.

### **Lower Broadway Trade Area**



### *Method of Analysis*

The analysis included a scan of national and local data sets, with input grounded in local knowledge and interpretation based on real estate expertise. Claritas provided national demographic and retail data. Local and alternative data sets used in the scan include Home Mortgage Disclosure Act (HMDA) data, traffic counts, information on local business mix, and building permits.

## **II. KEY FINDINGS**

### **Summary of Core Market Assets and Characteristics**

Lower Broadway serves a diverse constituency of local residents, daytime employees and a regional market of new immigrant communities of primarily Latino and African decent as well as a long standing regional furniture market. These market assets and characteristics suggest opportunities for growth and should be used to inform discussions with existing retailers, potential entrepreneurs, developers, and other community stakeholders.

1. An ideally situated commercial district that combines a mix of both pedestrian and automobile-oriented consumer goods with significant thru traffic and a recent growth in the concentration of middle-income households.
2. Significant pending investments in streetscape improvements and physical infrastructure.
3. A regional destination for Latino and African products and services and comparison furniture shopping.

### **Demographic Assets**

#### *Median Income has increased*

Median income is the standard measure used by developers and retailers to understand the market. By this standard, the area is on par with the greater Essex county market. The median income in the Lower Broadway trade area has increased 45.4% since 1990, of which 18.5% occurred from 2000-2008.

*Population has grown*

The population in the Lower Broadway trade area has increased by 14% since 1990, in comparison to the county population, which has decreased by .5% since 1990.

*Middle-income and middle-upper income population has grown*

The Lower Broadway trade area has seen an increase in the number of middle-income households, with 92% more in this category since 1990. In contrast, Essex County has seen a small reduction in its middle-income and upper-middle income population.

*Moderate to strong middle- to upper-middle income presence*

The Lower Broadway trade area is a diverse community, evenly distributed between lower, moderate and middle to upper-income households. In the community 30% of the households are middle to upper-middle income.

**Retail Demand and Supply**

*Concentrated Buying Power*

The urban density of the Lower Broadway trade area offers concentrated buying power that is a critical measure of market potential that is often overlooked by retailers in search of new markets. The concentrated buying power in Lower Broadway is \$174.3 million dollars per square mile—almost *twice* that of the county where concentrated buying power is \$94 million per square mile.

*Opportunities for existing and new businesses*

Three retail categories show positive leakage of varying degrees, suggesting opportunities for existing and new businesses. These include general merchandise, electronics & appliance stores, and clothing & clothing accessories stores. The strongest retail category is general merchandise, where retail demand suggests opportunities for additional square footage in the neighborhood. Electronics & appliance stores and clothing & clothing accessories stores show less leakage, suggesting opportunities to help existing stores capture unmet demand rather than opportunities for new neighborhood stores.

*Lower Broadway as a destination for automobile oriented businesses, health and personal care, furniture and home furnishings*

Retail leakage in these categories is negative, indicating more supply than can be met by trade area shopper demand. This means that shoppers travel from outside the trade area to Lower Broadway to purchase these goods and services. As a result, there may be opportunities to raise further awareness of these established niche markets to support existing merchants.

*Business Mix – both a neighborhood serving district and an automobile-oriented corridor*

A review of the business mix suggests that Lower Broadway is both a neighborhood commercial district and an automobile-oriented corridor. A number of retail uses, such as furniture and motor parts depend on a clientele likely to drive from other areas through the region.

While more detailed 24-hour traffic count data was unavailable at the time of this study, traffic counts during rush hour suggest high retail traffic through the district, both in the morning and evening. The recent opening of a drive-through Dunkin Donuts in the trade area, whose corporate site selection criteria is a minimum of 20,000 cars per day, suggesting opportunities to cater to a regional clientele. Bus ridership in the area is also significant. The Lower Broadway trade area is served by six bus lines with an average weekly ridership of 43,093 passengers with a key passenger transfer intersection within the area.

### **III. STRENGTHS AND OPPORTUNITIES**

#### **Pockets of Retail Demand**

General merchandise, electronics & appliance, and clothing & clothing accessories are retail sectors with the opportunity to capture local/regional demand through new stores or existing stores. Key customer segments that can be targeted include local residents, new middle-income residents and new homeowners, commuters who arrive by both car and bus, and the regional immigrant community.

#### **Attractive Built Context**

Although there are many buildings and facades in need of rehabilitation, the street has a good, dense stock of attractive, highly visible buildings that, if successfully renovated could serve as an important signal to investors that the district presents profit opportunities.

### **Successful Local Businesses**

The strongest indicator of a successful retail district is the presence of successful businesses. The Family Dollar, for example, was frequently cited by both local residents and employees as a frequent shopping destination. There are also several quality small businesses with highly engaged owners as well as some motivated new entrepreneurs.

### **Decrease in Crime Rates**

Although we were unable to secure local crime data for this study, the presence of a local beat cop [community policing] has been a welcome addition by merchants and customers alike. Recent dialogue with the local district command is offers a renewed connection and a sense that the the district's security needs are being recognized.

### **New Development & Investment**

Significant new capital investment is anticipated, including \$2.5 million in streetscape improvements for sidewalks, trees, crosswalks and new lighting on the Lower Broadway corridor between Clay Street and Park Avenue. There is also the potential for \$800k - 1 million in façade improvement dollars under consideration for the Lower Broadway area.

### **Engaged Leadership**

La Casa de Don Pedro, with the support of Greater Newark LISC and The Garfield Foundation, is prepared to advance the commercial district revitalization efforts. As the sponsor of the LME Retail Scan, La Casa has committed significant resources of time and money to the effort. They also previously invested and have current redevelopment initiatives that serve a catalyst for the revitalization efforts. In addition La Casa continues to advance and support community-based initiatives such as graffiti-removal and small business technical assistance.

The steering committee that participated in the formulation of a short-term work plan has also played a pivotal role throughout this effort. That group reflects a broad and diverse set of community players, including resident & merchant representatives, property owners, local institutions and non-profits, elected officials as well as government officials, inclusive of the local police officers.

## **IV. CHALLENGES**

### **Physical Environment**

Residents and non-resident consumers and merchants alike indicated widespread dissatisfaction with the aesthetic appeal of the district. Although there are few vacant stores, many buildings and facades along Lower Broadway are in poor condition and the presence of undeveloped parcels taint shopper perception of the district and its businesses. Empty tree pits, torn awnings and trash on the sidewalk are a turn off to potential shoppers. Moreover, the district looks closed for business during morning rush hour when most of the gates remain closed and covered in graffiti. This is the time of day when the most visitors travel through the district. The street circulation pattern means that these same drivers bypass the district when heading outbound in the evening.

### **Perception/Reality of Crime**

Both the perception and the reality of crime affect customers, however the concern is more prevalent in the evening (when many businesses are closed) than during the day. The recent deployment of a local ‘beat cop’ along the Broadway corridor has been welcome by both merchants and shoppers.

It should be noted that the parking is exacerbated by crime concerns, as employees and merchants resist parking their cars on side streets for fear of theft or vandalism. Instead, many occupy valuable short-term parking spaces in front of stores.

### **Storefronts and street lacking in curb appeal**

Roundtable discussions and interviews with customers, both residents and non-residents, indicate a strong desire for a more attractive and inviting streetscape. This includes the elements in public view (including streets, sidewalks and sidewalk fixtures such as bus stops, trash cans, and light fixtures) and those within the purview of local stores and property owners, (i.e. facades, window displays and store interiors).

### **Competition from other automobile-oriented districts**

Nearby competitive shopping districts offer a greater variety of convenient, economically-priced goods (both retail and groceries) that continue to attract district shoppers. The data

suggests that customers in the Lower Broadway trade area are frequently shopping in these districts—resulting in less discretionary income being spent within the trade area.

## **V. SUMMARY OF STRATEGIES/PRELIMINARY WORK PLAN**

The recommendations included in Appendix A of this report reflect the consensus of the steering committee and serve as a starting point for next steps and early action initiatives. It is expected that all the active participants, inclusive of La Casa de Don Pedro, with collaboration of LISC Greater Newark & Jersey City, the Steering Committee and the other community stakeholders, will advance the interventions recommended by this study.

### **Overview**

Attracting customers to Lower Broadway will first require addressing conditions “outside of the store” that affect perception and appeal of the street as a shopping destination – including in the long term, finding ways to improve the retail mix as well as the visibility and branding of the street. It will also require that attention be paid to what happens “inside the store” - such as ensuring that businesses have the expertise to more effectively promote the goods and services available in the district to the neighborhood and regional shoppers as well as the niche Spanish-speaking market.

MetroEdge has outlined a set of programmatic activities that includes four major components.

#### *Setting the Stage with Clean and Safe*

Setting the stage for commercial district revitalization begin with effort to improve the cleanliness and safety of the area. It is important that the revitalization effort start by keeping activities simple and extremely focused on some of the more visible efforts. Addressing the aesthetic appeal of the district will also help to increase the legitimacy of the revitalization effort and further support increased engagement on the part of local property owners, merchants and residents.

### *Transportation Management*

The district can only thrive if customers find it convenient and accessible. Strategies to improve accessibility for customers arriving by both mass transit and car should be an on-going part of the revitalization effort.

### *Retail Mix*

Successful business districts offer a retail mix that allows customers to easily accomplish multiple tasks in close proximity to one another. In the long term, the revitalization effort should address improvements to retail attraction. In the short-term, the revitalization effort must focus on helping existing businesses improve their current merchandise mix, store conditions and marketing efforts in a way that enables them to grow their market and attract customers who are currently choosing to spend their money elsewhere. Successful existing businesses are among the most affective retail attraction marketing tool.

### *Administrative Management*

On-going administrative management will be critical to the implementation of the above initiatives. In some cases these activities can and should be approached collectively, harnessing the capacity and resources of multiple organizations to achieve success. In others, each stakeholder can work independently on their efforts, but there is a need to coordinate efforts and maintain communication and information sharing to ensure that their efforts and programmatic activities are complimentary rather than duplicative.

# APPENDICES

## APPENDIX A: WORK-PLAN

TASK	LEAD AGENCY/ CMTE	POTENTIAL SUPPORT AGENCY/CMTE
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### CLEANLINESS COMMITTEE

Goal #1: Cleanliness	<i>Improve general cleanliness of district both on-street and in stores</i>		
Strategy A:	<i>Improve Store Cleanliness/Clutter Inside Stores</i>		
Action	Merchants to maintain and improve window displays	Merchants, La Casa	Rutgers Business School, Cleanliness Committee
Action	Create/distribute Hygiene Manual/Customer Service Training	UEZ	Merchants, Cleanliness Committee
Action	Award and recognize		Cleanliness Committee
Action	Adopt a barrel/tree pit campaign	La Casa	Newark Conservatory, Merchants, Cleanliness Committee
Strategy B:	<i>Improve Street Appearance</i>		
Action	Regular sidewalk cleaning	Merchants	Prisoner Re-Entry Program/Essex Community College
Action	On-going graffiti clean-up (quarterly)	Merchants	City, La Casa
Action	Lower-Broadway façade improvement funds	Brick City	La Casa
Action	Streetscape projects	UEZ	La Casa
Action	Mural program with local youth - used to define Lower Broadway brand	La Casa	LISC, City/City Mural Program

### SAFETY COMMITTEE

Goal #2: Safety			
Strategy C:	<i>Improve community safety within the district and surrounding streets</i>		
Action	Engage CSI program to identify additional safety measures	LISC	La Casa, Newark Police
Action	Install additional security cameras	Newark Police Department	

### PARKING COMMITTEE

Goal #3: Parking			
Strategy D:	<i>Improve convenience and safety of parking for customers</i>		
Action	Painted letters on sidewalks to correspond to parking spots	Councilman Bell	Merchants, Parking Committee
Action	Parking study to identify solutions to parking and transit constraints	La Casa	LISC, Parking Committee
Action	Improved signage clarifying current parking regulations	Councilman Bell	Merchants, Parking Committee
Action	Identification of additional parking lots	La Casa	Merchants, Parking Committee

## Work Plan (continued)

TASK	LEAD AGENCY/ CMTE	SUPPORT AGENCY/CMTE
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### RETAIL COMMITTEE

<i>Goal #4: Business Retention/Attraction</i>	<i>Develop a thriving local business community that meets the needs of local customers</i>	
<i>Strategy E:</i>	<i>Improved marketing of local businesses</i>	
<i>Action</i>	Share Market Data with Merchants	La Casa Merchants, UEZ, City, Retail Committee
<i>Action</i>	Business directory	Merchants, La Casa UEZ, City, Retail Committee
<i>Action</i>	District advertising (directory, coupon books, new homeowner mailings, newsletter, etc.)	Merchants, La Casa UEZ, City Councilperson,
<i>Action</i>	Special Events (Sidewalk sales, seasonal events, etc.)	UEZ, Merchants La Casa, Retail Committee
<i>Strategy F:</i>	<i>Improve the service and product mix of existing stores</i>	
<i>Action</i>	Customer service training for district merchants and employees (bilingual)	UEZ, Rutgers/Brick City, La Casa
<i>Action</i>	Sharing of MetroEdge data on demographics and customer preferences with merchants	La Casa/Merchants
<i>Action</i>	Training/workshop in window displays (bilingual)	Merchants Rutgers Business School
<i>Action</i>	Business coach (up to 5 businesses)	La Casa
<i>Strategy G:</i>	<i>Improve the existing business mix with new tenants (long-term)</i>	
<i>Action</i>	Convene organizations and stakeholders to discuss next steps in support and advance retail attraction	La Casa

## APPENDIX B: COMMUNITY OUTREACH LIST

North Newark Pet Shop	Club Kaneshie
Los Primos Restaurant	Delgado Travel
Botanica San Miguel	D&D Barber Shop
Tierra Santa Furniture & Mattress	Ecuadorian Flowers
Broadway Carpet & Bedding	LISC Greater Newark & Jersey City
Horne Liquors	La Casa de Don Pedro
Good Clean Fun Laundromat	Newark Police Department
Reaction Salon II	City of Newark
AGS Shito Ryu	Councilman Quintana's office
NDC Stores	Councilman Bell's office
Jackson Hewitt	Urban Empowerment Zone
La Islita Men's Shop	MLK Care Club Block Association
El Rincon Latino	Garside Care Club
Transmissions Inc.	La Casa employees
Costamar Travel	Local residents

## **APPENDIX C: STAKEHOLDER COMMITTEE**

Robin Brown, LISC Greater Newark & Jersey City

Carmen Bautista, Garside Care Club Block Association

Torrence Burrows, Business Owner, Jackson Hewitt

Julio Colon, La Casa de Don Pedro

Digna Dubon, Muebleria Discount

Roberto Frugone, La Casa de Don Pedro

Norma Gonzalez, Office of Newark Central Ward Councilman Charles A. Bell

Maria Carmen Mosca, Office of Newark Council At-Large Luis A. Quintana

Captain Gregory Meehan, Newark Police Department

Norberto Otero, North Newark Pet Shop

Captain Antonio Perez, Newark Police Department

Joe Retamar, La Islita Men's Shop

Perris Straughter, City of Newark Department of Economic and Housing Development

Carmen Sanchez, MLK Care Club Block Association

Rafael Zabala, Office of Newark Urban Enterprise Zone

The Garfield Foundation

## APPENDIX D. METHODOLOGY AND TERMINOLOGY

### A. Methodology

This report reflects a first stage of exploration that is data based. Sources and limitations of the core data as well as explanation of the analytic methodology are provided below. Broadly, it should be noted that data-based analysis provides a useful starting point - and offers the benefits that it can uncover less obvious opportunities, compare multiple, large geographies, and be done relatively quickly and inexpensively - but it must be applied judiciously and in context. LISC MetroEdge (LME) uses national and local datasets to better understand the area of study. National datasets include Claritas and Home Mortgage Disclosure Act (HMDA) and local datasets vary depending on the availability. Claritas is a national demographic data provider which uses census information as its base and is widely used by retailers. HMDA is loan information that helps inform the investment activity in a given area. All data sources have certain limitations, and some important characteristics of retail markets cannot be captured by secondary data. As a result, it is important to understand how to use and interpret the data appropriately and to complement it with other types of analyses.

### B. Terminology

**Trade Area:** Area defined by physical and/or sociological boundaries that determines the target market for the retail types evaluated for a specific site or retail corridor. This area often differs from political, community, or service area boundaries. (Source: Retail consultants, MetroEdge, on the ground knowledge)

**Demand:** Demand is the measure of potential dollars available to be spent in retail stores by the consumers in an area. This information is derived from the Census of Retail Trade. Retail sales by store type are correlated with demographic characteristics to develop estimates of expenditures. The Demand of a particular geography is estimated by identifying the demographic characteristics of the area, then extrapolating the associated expenditure patterns for those demographics and updating these estimates for the current year. These models and resulting spending estimates are imperfect, particularly for inner-city areas, and tend to underestimate Demand for those areas. They are nevertheless the best available for present purposes and, keeping in mind their limitations, can be reliably used to consider the relative strength or spending potential of geographies. (Source: Claritas)

**Supply:** Retailers, of course, are interested not only in the Demand of a neighborhood, but also in the competition – how much of that retail potential is not met locally? The second variable, Retail Supply, provides an estimate of the dollar amount of actual retail sales by store type. These estimates are also based on the Census of Retail Trade. It should be noted that the Census of Retail Trade, as well as current business databases, may tend to undercount smaller and informal economy business activity so this estimation procedure may also underestimate total retail sales in a given geography. These datasets, however, are the best available data and quite reliable for the purpose of determining supply. (Claritas, Census Retail Trade, MetroEdge Calculations)

**Adjusted Float:** Adjusted Float provides a measure of the extent of competition for the unmet demand in the neighborhood: how much of that Float is met by stores nearby? In other words, if there are stores outside the boundaries of the neighborhood whose market areas likely include some of the households inside the neighborhood, the Float from those households is really not unmet demand, since it is presumably satisfied nearby. We call this “Adjusted Float” and subtract it from the overall Float, to adjust the estimates of retail potential to account for nearby competition.

The figures below provide a visual representation of how adjusted float is calculated. Float analysis first apportions demand and supply data to the trade area using GIS to calculate float (shown in Figure 1). In Figure 2, adjusted float analysis looks at a 2.5 mile buffer around the trade area and adjusts float based on nearby stores. Adjusted Float finally takes into account distance from the trade area and the size of a store, as is shown in Figure 3. (Claritas, MetroEdge Calculations)

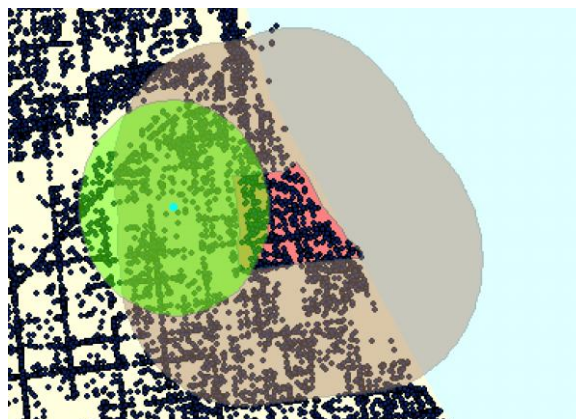
**Figure 1:**



**Figure 2:**



**Figure 3:**



**Retail Float:** Retail Float is a simple yet powerful metric that measures the amount of unmet retail opportunity in a geographic area. Retail Float is the difference between Demand and Supply: it is an indicator of how much residents of an area spend that is not captured by actual sales by stores in the area. This methodology tends to produce a conservative estimate of float (i.e., it tends to underestimate float, providing a minimum or lower boundary of the likely amount of float) because stores sell to people outside the neighborhood as well. Most neighborhoods have positive float, because certain types of goods and services are not normally purchased in the neighborhood. For example, you would not find major appliance stores in most neighborhood areas. There are also some cases where you can find negative float, because there can be a saturation of the market in a certain category or your community is a destination for certain types of retail. For example, clothing stores tend to cluster as customers like to compare these goods. (Source: MetroEdge Calculations)

**Float as a Percentage of Demand:** Percentage of Demand that is met outside the study area. (Source: MetroEdge Calculations)

**Estimated Square Footage:** Estimated total additional amount of square footage available in the study area for retail development. These figures are based on adjusted float, which is a more conservative estimate of float. (Source: ICSC, MetroEdge Calculations)

**Service Sector Gap (number of establishments):** Estimated gap in the number of service sector establishments in the study area by category. The gap is calculated based on the average number of establishments per 1,000 households in the county. (Source: Claritas, MetroEdge Calculations)

**Population:** Population count for the study area.

**Population Density:** This represents the number of people per square mile.

**Households:** Household count for the study area.

**Median Household Income:** Median household income is an indicator of how much people in the area earn per year.

**Total Middle Income Households:** The number of households with annual household income between \$50K and \$75K.

**Concentrated Middle Income Households:** This category shows the total number of households with annual household income between \$50K and \$75K, per square mile.

**Total Middle to Upper Middle Income Households:** The number of households with annual household income \$50K and above.

**Concentrated Middle to Upper Middle Income Households:** This category shows the total number of households with annual household income \$50K and above, per square mile.

**Households vs. Families:** Claritas counts not only the number of people in an area but also the number of households and families. A “household” is all the people who live in a single housing unit. It may be a family of 4 or a single person or 7 unrelated people – each is one household. Claritas defines a “family” as more than one person related by blood or marriage living in the same household. Therefore there are always more households than families in any area. Median household income is an indicator of how much people in your area earn.

**Household Size:** Households in the study area for the years 2000 and 2008.

**Age Distribution for the current year:** Age distribution for the current year in the study area. The distribution is children less than 18 years old, people 18 to 65 years old and 65 years old and above.

**Age Distribution Trend:** Age distribution for the year 2008 for the study area. This distribution is broken down into groups of 3, 5, and 10 years and groups from 0 to 85 years or older.

**Home Ownership Rate:** Rate of owner occupied housing versus renter occupied housing for the current year in the study area.

**Education Attainment Trend:** Breakdown of educational attainment for the study area in the years 2000 and 2008.

## APPENDIX E. DEFINITIONS OF RETAIL CATEGORIES

### Float: Motor Vehicle & Parts Dealers

- Includes: motor vehicles and parts from fixed point-of-sale locations that typically operate from a showroom and/or an open lot where the vehicles are on display.
- Staff: The personnel generally include both the sales and sales support staff familiar with the requirements for registering and financing a vehicle as well as a staff of parts experts and mechanics trained to provide repair and provide maintenance services for the vehicles.
- Other Details: Specific industries have been included in this subsector to identify the type of vehicle being retailed. Sales of capital or durable non-consumer goods, such as medium and heavy-duty trucks, are always included in wholesale trade. These goods are virtually never sold through retail methods.
- Example: Honda Dealership

### Float: Furniture and Home Furnishings Stores

- Includes: New furniture and home furnishings from fixed point-of-sale locations that usually operate from showrooms and have substantial areas for the presentation of their products.
- Other Details: Many offer interior decorating services in addition to the sale of products.
- Example: Room & Board

### Float: Electronics and Appliance Stores

- Includes: New electronics and appliances from point-of-sale locations which often operate from locations that have special provisions for floor displays requiring special electrical capacity to accommodate the proper demonstration of the products.
- Staff: The staff includes sales personnel knowledgeable in the characteristics and warranties of the line of goods retailed and may also include trained repair persons to handle the maintenance and repair of the electronic equipment and appliances.
- Other Details: The classifications within this subsector are made principally on the type of product and knowledge required to operate each type of store.
- Example: Best Buy, Radio Shack

### Float: Building Material and Garden Equipment and Supplies Dealers

- Includes: New building material and garden equipment and supplies from fixed point-of-sale locations that have display equipment designed to handle lumber and related products and garden equipment and supplies that may be kept either indoors or outdoors under covered areas.
- Staff: The staff is usually knowledgeable in the use of the specific products being retailed in the construction, repair, and maintenance of the home and associated grounds.

- Example: Home Depot

Float: Food and Beverage Stores

- Includes: Retail food and beverages merchandise from fixed point-of-sale locations that have special equipment (e.g., freezers, refrigerated display cases, refrigerators) for displaying food and beverage goods.
- Staff: They have staff trained in the processing of food products to guarantee the proper storage and sanitary conditions required by regulatory authority.
- Example: Save-A-Lot

Float: Health and Personal Care Stores

- Includes: Health and personal care merchandise from fixed point-of-sale locations which are characterized principally by the products they retail.
- Staff: Some health and personal care stores may have specialized staff trained in dealing with the products. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer's needs.
- Example: Walgreens

Float: Gasoline Stations

- Includes: Establishments selling automotive fuels (e.g., gasoline, diesel fuel, and gasohol) and automotive oils and retailing these products in combination with convenience store items.
- Other details: These stores have specialized equipment for the storage and dispensing of automotive fuels.
- Example: Mobil

Float: Clothing and Clothing Accessories Stores

- Includes: New clothing and clothing accessories merchandise from fixed point-of-sale locations that have similar display equipment
- Staff: Staff is knowledgeable regarding fashion trends and the proper match of styles, colors, and combinations of clothing and accessories to the characteristics and tastes of the customer.
- Example: Old Navy

Float: Sporting Goods, Hobby, Book, and Music Stores

- Includes: Industries engaged in retailing and providing expertise on the use of sporting equipment or other specific leisure activities, such as needlework and musical instruments. Book stores are also included in this subsector.
- Example: Barnes and Nobles, JoAnn Fabrics

Float: General Merchandise Stores

- Includes: Industries in the General Merchandise Stores subsector include new general merchandise from fixed point-of-sale locations.
- Staff: Establishments in this subsector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes a variety of display equipment and staff trained to provide information on many lines of products.
- Example: Target, The Dollar Store

Float: Miscellaneous Store Retailers

- Includes: Merchandise from fixed point-of-sale locations (except new or used motor vehicles and parts; new furniture and house furnishings; new appliances and electronic products; new building materials; and garden equipment and supplies; food and beverages; health and personal care goods; gasoline; new clothing and accessories; and new sporting goods, hobby goods, books, and music). Establishments in this subsector include stores with unique characteristics like florists, used merchandise stores, and pet and pet supply stores as well as other store retailers.
- Example: PETCO

Float: Food Services and Drinking Places

- Includes: Industries that prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only; while others provide various combinations of seating space, waiter/waitress services and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are full-service restaurants; limited-service eating places; special food services, such as food service contractors, caterers, and mobile food services; and drinking places. Food services and drink activities at hotels and motels; amusement parks, theaters, casinos, country clubs, and similar recreational facilities; and civic and social organizations are included in this subsector only if these services are provided by a separate establishment primarily engaged in providing food and beverage services.
- Example: The Olive Garden, Panera Bread