



DETROIT



NEIGHBORHOOD RETAIL OPPORTUNITY STUDY



Detroit Economic Growth Corporation
January 2018



WELCOME

Dear Advocate for the City of Detroit,

I am excited to present a comprehensive retail market analysis of 13 study areas in the City of Detroit. This retail market analysis is a critical first step as part of a broader effort to ignite economic growth in the City of Detroit. This initiative comes in the form of a small business and commercial corridor revitalization program, which conducts the following functions:

1. **Attract new small businesses and real estate investment.** The Detroit Economic Growth Corporation (DEGC) and its partner organizations will encourage new business owners to locate in commercial corridors throughout the city to meet retail demand and serve the community.
2. **Retain and expand existing small businesses.** To ensure the success of existing businesses that contribute to growing and thriving retail environments in the study areas, our teams will bolster local retailers by providing tools and resources for continued operations and, where appropriate, for expansion.
3. **Improve the physical conditions along commercial corridors.** Successful retail markets are dependent on solid buildings and favorable conditions. In collaboration with City departments and community members, the DEGC will identify specific blocks within the study area corridors to invest in physical improvements to support a vibrant retail atmosphere.
4. Develop new tools to provide expanded opportunities for Detroiters, their businesses, and their existing community. The DEGC will develop new tools to help small businesses, property owners, developers, and other parties to facilitate effective investments in small businesses and real estate assets in these commercial corridors.

To achieve these objectives, DEGC created the Motor City Match initiative on April 1, 2015, which connects new or expanding businesses with vacant real estate assets in the city. In order to appropriately match businesses with properties and increase their probability for success, it is critical to understand the conditions of the market and the inherent opportunities for growth in our retail corridors.

The enclosed retail market analysis unveils the market conditions and identifies opportunities in the marketplace. This analysis also informs the small business attraction and placement strategy in each commercial corridor. The impact of this report will include informing Motor City Match, Motor City Re-Store, and future neighborhood corridor programs with data-driven strategies to assist with program delivery. This study adds context to the unique assets, opportunities and challenges present in the targeted commercial corridors, which will empower improvement and development efforts throughout the City.

I applaud you for reading this report and becoming informed on the market conditions of the City. We appreciate your support and interest in a growing and thriving Detroit.

Sincerely,

Michael Rafferty, Vice President
Small Business at Detroit Economic Growth Corporation
Detroit Economic Growth Corporation



ACKNOWLEDGMENTS

Many thanks to all of the Detroiters who contributed to this report, particularly the community members from the neighborhoods surrounding each commercial corridor. On several occasions, they took time out of their lives to participate in focus groups, contribute to workshops, and review the materials that became essential components of this study. Their collective expertise was invaluable in this process.

In addition to community leaders, City staff, business owners, small business service providers, property owners, real estate developers, commercial brokers and lenders provided critical insight on the Detroit retail market.

Finally, numerous studies have come before this one. The data, conclusions, and recommendations of each one greatly contributed to the analysis and outcomes contained herein.

EXECUTIVE SUMMARY

MAJOR FINDINGS

Following an extensive study and analysis of existing retail supply, the following conclusions were reached:

The total amount of usable retail supply along these corridors is dramatically smaller than the actual available retail supply.

A 1950s Congressional amendment in the Federal Tax Code that allowed commercial buildings to be depreciated faster than in previous legislation. Coupled with increased automobile accessibility, this legislation gave Detroit developers the opportunity to mass-produce commercial buildings along commuter corridors at the height of Detroit's economic prosperity. Without an incentive to improve inexpensive properties, landlords and property owners in Detroit have since allowed their assets to deteriorate as tenants and populations have relocated out of the City. Today, a large portion of this inventory sits vacant in a blighted and unusable state. As automobile usage has lessened over time, the auto-centric nature of much of Detroit's retail stock is no longer compatible with the retail needs of many of the city's residents. What remains of many historic, pedestrian-friendly storefronts are often in isolated locations and are in poor to blighted condition. These subpar retail conditions pose a challenge to generating a strong retail cluster in the various commercial corridors.

Many retailers operate in isolation due to the absence of focused retail districts along the corridors.

Non-profit organizations and local governments in tandem with private developers have been diligently working to position and support the tenanting of retailers in Detroit's neighborhoods. Through the collective efforts of these groups, retailers have been opening and operating in retail spaces. However, the oversupply of commercial space has resulted in the sporadic placement of retailers, rather than in consolidated retail districts. A lack of clustering poses challenges for Detroit's retail environment, as tenants cannot benefit from co-tenancy with other retailers and create a safe, pedestrian-friendly shopping district.

Each study area can support more Neighborhood Goods & Services retailers.

Detroit's neighborhoods are under-supplied in the Neighborhood Goods & Services category. The assumption that the market will provide neighborhoods with everyday needs such as grocery, cleaning services, and pharmacies has left Detroit's communities without these essential retailers. The demand in this retail category is heavily influenced by the fact that many residents do not have regular and reliable access to personal vehicles or public transportation that would allow them to shop for daily or weekly needs such as grocery or pharmacy in other communities.

Commercial real estate is struggling to overcome the various investment challenges facing Detroit's neighborhoods.

Due to the oversupply of commercial real estate in Detroit, the amount of real estate investment opportunities is numerous; however, there is limited knowledge on where to target this investment. This market condition leads to a retail cluster where high-quality retail space is sandwiched between vacant, blighted commercial spaces. Today, owners face a variety of problems in investing in their properties, increasing the difficulty of redeveloping larger commercial blocks. Due to these investment problems, retailers have faced significant difficulty in reaping the benefits of the quality of their storefronts, given their deleterious surroundings.

MAJOR RECOMMENDATIONS

Major recommendations for each study area fall within the following themes:

Configure long, linear commercial corridors into focused retail nodes in order to better serve the shopping needs of neighborhoods.

The linear design of the commercial corridors does not serve or complement the customer behaviors of the surrounding residential neighborhoods, nor do they support existing retailers in maximizing their sales potential. Shopping centers along commercial strip corridors were designed to be accessed by automobiles, but the surrounding residents often do not have reliable access to personal vehicles or public transportation and are required to walk in non-pedestrian friendly areas. For these reasons, it is imperative that a restructuring plan for retail corridors focuses retail from the current linear design into a nodal one. A micro-districting strategy can help form neighborhood retail clusters, hone investment activity, concentrate financing resources, and spur new development. On a smaller scale, priority blocks (which will be discussed in a later phase of this report) have been identified as the most favorable location for the highest concentration of retail activity. It is recommended that the Planning & Development Department consider including these retail designations in the Comprehensive Plan update and ensure zoning requirements match the intended uses.

Bolster collaborative efforts to execute this focused retail strategy.

A unified effort between government agencies as well as non-profit and for-profit organizations, will be critical to the execution of a focused retail strategy. For example, local government organizations can improve and formalize commercial district management opportunities, utilizing the expertise of private developers and key stakeholders in order to implement a unified retail vision. Partnering with the Department of Transportation to ameliorate street and sidewalk conditions for commercial districts within the identified retail zone will improve the overall appearance of retail clusters as well as increase the perception of safety and walkability, for example.

Provide educational resources and support to retailers and property owners.

The city can more fully collaborate with non-profit and for-profit organizations to provide information to retailers and property owners. Mobilizing under a unified front toward a focused retail strategy while developing educational materials and professional assistance programs will bridge the information gap that stands in the way of creating, relocating, or expanding a business in the city. Specifically, outlining the non-traditional financing options that are available to retailers and property owners will provide incentives for these groups to take action and improve retail economy.

Undergo a commercial district rebranding exercise for individual neighborhoods.

A rebranding exercise will help discard the negative imagery associated with high levels of crime and lack of consumer spending power as well as embrace and develop existing neighborhood characteristics. Some instances include the Avenue of Fashion on Livernois Avenue, the historic nature of the Jefferson-Chalmers corridor, and the concentration and quality of unique restaurants in the West Vernor Corridor - Springwells and Banglatown study areas, as just a few starting places.

Establish an organization, appropriate to the size of the commercial district, for each walkable neighborhood and citywide.

The major findings and recommendations within this report provide context and a deeper understanding of how the various study areas are functioning both independently and with one another. All together, these major findings present the broad view of how Detroit can continue to manage its retail economy and take advantage of opportunities for improving the overall retail market moving forward.



TABLE OF CONTENTS

Introduction	3
Objectives of the Study	4
Glossary of Terms	5
Neighborhood Typologies	7
Retail Typologies	8
Recurring themes	9
A Few Retail Corridor Stakeholders	13
Retail Fundamentals	14
Introduction	15
Retail Best Practices	16
The Foundations of Retail	17
Activating Non-Retail Uses	22
Market Analysis	23
Introduction	24
Overview of Study Areas	25
Banglatown	26
East Warren	33
Islandview-Greater Villages	39





Jefferson-Chalmers	45
Joy-Southfield	51
Livernois-6 Mile	57
Northwest Grand River Avenue	63
Osborn	70
Rosa Parks-Clairmount	77
Russell Woods	84
West Vernor Corridor - Mexicantown	91
West Vernor Corridor - Springwells	98
West Warren	105
Conclusions & Citywide Recommendations	111
Conclusion	112
Final Report Recommendations	114
Appendix	120
Methodology	121
Estimating Sales Productivity	124
Market Demand Tables	125





INTRODUCTION



OBJECTIVES OF THE STUDY

For the past half century, downtowns across the country have been transforming. Many of the stores once essential to the retail landscape have seen their profits plummet and have subsequently shuttered or restructured. Cities that are actively addressing population and employment losses have felt the decline of their shopping cores. The distance between home and neighborhood shopping trips has increased, making life difficult for many people, and in turn, the loyal community retailers who have lost regular patronage as a result. The assumption that the market should take care of providing neighborhood goods and services to residents, particularly in areas where shopping cores have disappeared, has fallen short and left many neighborhoods without essential and accessible retail services. Strategizing for new and established retail districts that serve these communities is an essential amenity.

Detroit has struggled to maintain high-quality retail centers, though there is evidence that Detroit is making a come-back. Today, new stores are opening through the efforts of the public and private sectors. The city is buzzing with news of businesses that have opened their first stores.

The same economic indicators of growth are just taking off in the neighborhoods and corridors surrounding the urban core of Midtown and Downtown. Bright, creative businessfolk have capitalized on low-costs and low barriers to entry to give physical form to their fondest dream – whether that be a pie café, a vegan restaurant, or a bicycle repair shop. Existing stores have also been hard at work, serving their surrounding neighborhoods while still trying to navigate challenging retail market conditions. In Detroit, entrepreneurs have a robust collection of resources that have previously excluded existing store owners. Programs such as Motor City Re-Store by the DEGC and NEIdeas are beginning to provide support to long-standing retailers.

Despite its tendency to attract interesting and intuitive pioneers, the retail industry is full of risk-averse people – with good reason: few businesses celebrate their 10th anniversary and closures can mean draining personal savings. Regulations and political conditions in the city over the past several years have posed obstacles for attracting restaurants and stores who otherwise would be drawn to locations in the metro area. The potential of Detroit's districts is evident. Shoppers walk along the city's sidewalks and streets looking for goods and services. Retailers sweep in front of their stores in spite of the neglected vacant lot next door. Motor City Match grant recipients proudly display their revitalized storefronts and discuss their plans for the future.

None of these observations matter, however, if there is not an answer to the question: how much retail demand can be supported along each corridor? The purpose of this study is to answer this fundamental question and to strategize around any obstacles blocking success where sufficient retail demand is found.

The purpose of this study is:

- To determine if Detroit's study area neighborhoods have the essential retail amenities needed for residents to live comfortably in the city.
- To identify roadblocks such as regulatory, economic, and access issues that might hinder entrepreneurial opportunity along this study's selected corridors.
- To create an accurate sales and retail square footage dataset within each study area based on population and economic figures.
- To inform retailers and property owners of the opportunities available through existing and emerging programs while discovering the "pain points" for the application and approval processes.
- To unearth points of market distinction existing within commercial corridors but need to be highlighted and communicated to a broad customer base.
- To identify the amount of retail supportable in each study area and to translate that demand into an ideal "retail district size" for each corridor.
- To provide data to business owners and their support networks to help make informed decisions about what Detroit's market can support and where to locate particular business types.
- To support concurrent and future Planning and Development Department (PDD) studies with reliable data and strategies to implement into future zoning amendments, initiatives, and development review.
- To ultimately create opportunities for Detroiters, beautify neighborhoods for current and future residents, and attract market-appropriate investment - but not for the purpose of speculative investment.

GLOSSARY OF TERMS

Study Area: The designated retail corridor in each of the 13 pre-identified neighborhoods.

Retail Priority Block: A segment of one or more blocks along each study area's commercial corridor that is selected by identifying the optimal location for targeted investment. Priority blocks were chosen based on their visibility, accessibility, density, and other characteristics needed for sustainability.

Supply: Total square feet of retail-appropriate commercial space within a study area.

Demand: Total square feet of economically supportable retail space. See the Methodology (Page 121) for additional details on how supportable retail space was calculated.

Retail: For the purposes of this study, retail is defined as a commerce-driven entity that provides a good or service within one of the three major retail categories (see below).

Non-Retail: For the purposes of this study, commercial uses that are not considered retail are car dealerships, gyms, banks, medical offices, funeral homes, and office space, among others that decrease the walkability of the neighborhood.

Retail Appropriate Space: Commercial buildings that are suitable for a retail use. The building must be located at street-level, have a clearly defined storefront, and be visible to pedestrians or have clear signage for vehicular traffic.

Retail Occupied Space: Commercial buildings that are occupied by a business that operates in one of the three major retail categories (see below).

Non-Retail Occupied Space: Non-retailers, such as medical offices, banks, or law or financial assistance offices, tend to move into retail-appropriate space when the available space exceeds the demand for retail.

Retail Categories: In order to determine demand, customer expenditure categories (determined by the US Bureau of Labor Statistics) are broken down into three categories based on the three primary types of retail: Neighborhood Goods & Services (NG&S), Food & Beverage (F&B), and General Merchandise, Apparel, Furnishings, and Other (GAFO).

Neighborhood Goods & Services (NG&S): Retail that services convenience-based needs, is easily accessible, relies on the patronage of local residents and workers, and services daily and weekly needs. Ex: grocery stores, drugstores, dry cleaners, and salons.

Food & Beverage (F&B): Retailers that serve food/ alcohol on the premises, for either dine-in or takeout. Ex: restaurants, cafés, bars, take-out establishments.

General Merchandise, Apparel, Furnishings, and Other (GAFO): Retailers that sell specialty merchandise that is actively sought out by customers. These retailers face the greatest amount for competition, as expenditures in this category make up the smallest percentage of overall spending, and these stores are facing increasing competition from online sales. Ex: furniture stores, bookstores, antique shops, electronic stores.

Class of Space: Each storefront in the inventory was rated according to level of suitability for retail occupancy and likelihood the space will remain as retail space in the future. *Please note, this report does not make statements regarding the subjective qualities of current tenants or neighborhoods in determining class of space or demand.*

Class A Space: High quality retail space. Typically located on a corner or prominently situated within an inline strip of retail, floor-to-ceiling height of 14 feet or more, storefront that is at least 20 feet wide, highly visible, properly lit exteriors and display spaces, and well-constructed.

Class B Space: Mid-quality retail space. Diminished representation of Class A qualities, requires maintenance to operate to a typical retailer's standards, floor height less than 12 feet, and storefront width less than 15 feet.

Class C Space: Poor retail space. Building is aging/ requires large investment to bring to typical retailer standards, small or covered windows, and further diminished representation of Class B qualities.

Built-to-Suit (BTS): Retail space that was built out to the look, feel, and specifications of a specific retailer that makes repurposing the space for a different retailer difficult or impractical. Commonly seen with fast food restaurants along a primary road.

Modified Inventory: An adjusted sum of total retail space calculated by multiplying total square feet for each storefront by an efficiency percentage, which is determined by the Class of Space. A higher Class of Space means that more of the total square footage is likely to remain retail under improved market conditions.

Trade Area: The geographically defined population segment that contributes to the majority of sales for each study area. The ability for retail to capture sales will be highest within the Primary Trade Area. Secondary and occasionally Tertiary Trade Areas will contribute to total sales a respectively lower capture rates.

Capture Rate: A capture rate for a study area is applied to each expenditure category. The capture rate is the percentage of sales potentially captured by the retail within each study area under ideal conditions.

Modified Demand: An adjusted calculation for retail demanded per corridor that is weighted by varied ratios of low to high sales productivities. See Estimating Sales Productivity (Page 124) for more information.

Business Improvement District: Business Improvement Districts (BIDs) levy fees from local businesses to fund projects within a designated zone. BIDs are often responsible for landscaping and streetscape improvements, trash removal services, and marketing campaigns.

Principal Shopping District: Similar to a business improvement district, a principal shopping district (or a PSD) is an organization that can collect revenue to undertake projects that promote economic development within a specific area. A PSD can be established in any area that contains at least 10 retail businesses, whereas BIDs usually preside over larger districts.

Main Street Program: Main Street Programs are commercial district associations that receive technical assistance from Main Street America to promote economic development. Main Street Programs assist retailers in securing financial assistance, conduct design improvements within a district, and engage in marketing and promotional activities.

Merchandising Strategies: Ways that retailers on a commercial street can be configured to promote economic activity throughout the area. Common strategies include double facing commercial blocks with retailers, improving signage for pedestrians and motorists, and promoting a complimentary mix of retail types.

NEIGHBORHOOD TYPOLOGIES

Retail in Detroit is varied, ruling out one-size-fits-all solutions to each corridor studied. Throughout this document, neighborhoods and retail corridors are referred to as having urban, urban/suburban, suburban and rural contexts. This differentiation is determined by the study area's population density, and building size, setback, and other characteristics inherent in its physical form. Many corridors in this study, such as Northwest Grand River and Livernois/6-Mile, have a number of typologies within blocks of on another. These conditions and variations were considered for this study.

- **Urban:** Neighborhoods that are urban in form are characterized by high population counts, multistory mixed-use buildings (typically 5 or more floors), minimal building setback (i.e. amount of space between the curb and building), and on-street and/or possibly garage parking. Urban customers prioritize convenient retail options, as travel between origin and destination by foot is typical. Those that arrive by a vehicle are often discouraged by the availability and price of parking. Urban environments are often home to destination retailers, including chef-driven restaurants and upscale shopping destinations. These retailers, and other tenants, pay a premium to locate in the densest location in the city, with the highest potential for customer sales.
- **Urban/Suburban:** This neighborhood typology is defined by slightly diminished characteristics of urban neighborhoods and commonly associated with "Main Street"-type development: lower populations, multi-story buildings of less than 5 floors, a mix of single and multiple uses, gaps in the ground floor experience attributed to more parking, parks, greater setbacks, etc. In these environments, a customer might walk or drive to the retail destination. Utmost convenience is not expected, but is still factored into shopping behaviors. Retailers within this typology expect strong sales volumes due to the density, and often include neighborhood-serving tenants such as casual restaurants, grocery stores, salons, and dry cleaners.
- **Suburban:** Suburban neighborhoods are usually synonymous with the automobile. The infrastructure associated with these neighborhoods is characterized by expansive parking lots, larger setbacks, drive-thrus, curb cuts, and sparser populations (due to greater numbers of single family homes and single-story buildings). Retail customers shopping at suburban retail destinations typically are willing to travel greater distances for the goods and services needed, and are likely to arrive by vehicle or bus. Basket sizes are also larger for this customer, as the distance traveled contributes to infrequent trips.
- **Rural:** In a rural environment, inconvenience is expected because of the lack of density. Variety, costs, and quality are factored more heavily in customer preference, as they are required to drive greater distances to meet their retail needs. Although Detroit is not home to any truly rural neighborhoods, a few areas, such as Brightmoor, are characterized by limited access to retail goods and services.

RETAIL TYPOLOGIES

Not all retail operates the same way or serves the same customer. The size and cluster of stores and restaurants impact shopping patterns and spending potential. The following defines each retail space type:

- **Regional Shopping Center:** Large-format stores connected by inline shopping centers, often enclosed and surrounded by parking. All retailers are typically managed by a single entity. (Examples include Fairlane Town Center, Westborn Mall, Eastland Center).
- **Neighborhood Center:** Anchored by a grocery store or large drugstore, neighborhood centers usually include a mix of service-oriented and convenience-based shopping establishments. (Examples include Harbortown Shopping Center on Jefferson Avenue and Virginia Park Neighborhood Plaza Shopping Center on Rosa Parks Boulevard).
- **Strip Center:** A row of continuous, inline retailers that are managed by a single entity. Although strip centers are comprised of a variety of tenants, it is not unusual for these collections to be known by the name of the center. (Examples include The Shops at Northeast Village Shopping Center on Gratiot Avenue and Grandland Shopping Center on Grand River Avenue).
- **Large-Format Stores:** Although the sizes of large-format stores are shrinking, these establishments are typically in excess of 75,000 square feet. For the purposes of this study, any retail identified as a “large-format store” is in a stand-alone condition and not included in any of the typologies listed. (Example include Meijer on Grand River Avenue).
- **Independent In-line Retailers:** In-line, independently-owned retail represents the primary retail space typology in the study areas. Many buildings along the corridors have a different owner, creating a condition where building condition and tenancing is not unified. However, it also lends to a diverse mix of tenants, building upon Detroit’s commercial beginnings with locally-owned, original stores and restaurants operating independently of a larger strip center or shopping mall. (Examples include Sister Pie in West Village, Kuzzo’s Chicken & Waffles in Livernois-6 Mile, and Danto Furniture Show Room in SW Detroit).

- **Pad Sites:** Often located along a major roadway and separated from an adjacent shopping center by parking, pad sites are usually associated with fast food establishments, car dealerships, and banks. (Examples include Burger King, McDonald’s, Dollar Tree, and Taco Bell).

Destination Retail:

Many corridors are home to a destination retailer. These retailers do not have an exclusive neighborhood customer base or retail typology. The Neighborhood Retail Opportunity Study did not create strategies to establish more destination retailers along the corridors, as destination retailers are often vulnerable to lose sales to new, more attractive competitors. As Detroit’s retail market is rapidly changing, the strategies created were rooted in convenience-oriented, neighborhood-serving retail solutions.

RECURRING THEMES

Through a comprehensive review of existing studies, participation in neighborhood focus groups, and field observations in each study area, several recurring themes emerged. Identifying these topics led to a clearer understanding of what issues related to retail development have already been identified and discussed.

All neighborhoods have some level of participation fatigue.

Previous studies and reports recognize stakeholder and community fatigue, as residents have been promised change before but have been left empty-handed. This situation is causing residents to focus on short-term goals that fulfill their immediate needs and wants, rather than planning long-term for the city.

The foreclosure crisis has drastically hurt stability of neighborhoods.

Detroit neighborhoods have been experiencing population loss for several decades, beginning with the decline of the auto industry in the middle of the 20th century. Many neighborhoods had been able to maintain some relative home value, even among the decline, but the 2008 financial crisis had a drastic impact on the value of homes throughout the city.

According to the *Jefferson-Chalmers Neighborhood Stabilization Plan* (2012), the foreclosure crisis has increased vacancy rates and depreciated home values. Communities that were originally primarily owner-occupied are now increasingly renter-occupied as speculators bought foreclosed homes for heavily discounted prices. According to *Estimating Home Equity Impacts from Rapid, Targeted Residential Demolition in Detroit* (2015), a single-family home located within 500 feet of a residential structure that is unoccupied and tax foreclosable will impact the single-family home's value by -2.9%. A vacant lot within 500 feet of single family home will diminish its value by 0.5%. An occupied residential unit located within 500 feet of a single family home will have a +0.3% effect and a home that sells for greater than \$25,000 within 500 feet of a single-family home will increase the single-family home sale by +9.7%. It must be noted that several neighborhoods, especially those in the city's core, have upward trends in homeownership

and residential investment, indicating market stability and opportunity, as determined by Social Compact's *Detroit Drilldown Report* (2007).

The foreclosure of homes that were bought in a housing market characterized by rampant predatory lending created a glut of vacant homes that were either bought by speculators or left vacant. Speculating and renting, rather than owning homes, and in some cases deferred investment in homes to the point that they become blighted beyond repair. All of these factors depress home values and further delay the rejuvenation of Detroit's neighborhoods.

There is great need to develop pedestrian- and bike-oriented retail clusters.

Many reports conducted across Detroit have expressed the need for greater bike and pedestrian access along major thoroughfares. Detroit has a high rate of households without automobile access (approximately 25% of the population), and in order to increase access to community services and retail, the infrastructure of the roads should be adjusted to reflect residents' current modal transportation needs (e.g., improved sidewalks and bike lanes).

This theme is seen in multiple reports. *Going Green for Growth: Economic Development Strategies for Joy-Southfield* (2013) indicated that physical improvements meant to ease access to retail via walking or bicycle will increase overall access for people with limited or no car access. The *Jefferson-Chalmers Neighborhood Stabilization Plan* (2012) outlined improvements to the overall quality of experience for pedestrians as part of the stabilization strategy. The *Downtown Residential Market Study* (2013) for Northwest Grand River Avenue mentions that having pedestrian-oriented features is critical for creating a successful downtown environment. Finally, the *Rosa Parks-Clairmount Existing Conditions Analysis* (2017) indicated that the community currently faces a variety of accessibility challenges, including bus-routing issues and a lack of bike facilities. This demonstrates that residents are reliant on alternatives to cars as a form of transportation and this reality must be considered when developing retail corridors.

When changes to the road are made, they must be executed correctly. Focus group members for this study in the Joy-Southfield study area indicated that Joy Road was two large lanes, instead of improving the painting to

have two traffic lanes with a parking lane. This repainting created an environment where cars drive down Joy Road at very high speeds, creating a dangerous retail environment. In addition, no-parking signs in front of retailers have consequences such as reducing available parking and lowering access to retailers along the commercial corridor. Designs like these hurt retailers, and should be avoided in future developments at the private and public level.

Retail vacancy rates are high throughout Detroit.

Many retail corridors throughout Detroit are frequently dominated by vacant storefronts and empty lots. Shrinking residential populations, speculative owners, a lack of cash flow, and the impact of vacant properties on overall land values contribute to a depression of Detroit's retail market.

According to the *Detroit Strategic Framework Plan* (2013) and the Wayne State University Department of Urban Studies and Planning, 36% of Detroit's commercial parcels are vacant. *Vacant to Vibrant* (2016), conducted by a University of Michigan Department of Urban Planning Masters candidate in collaboration with ProsperUS Detroit and Southwest Economic Solutions, researched the commercial vacancy rates throughout the North End and the Southwest neighborhoods, which include Southwest Vernor and Springwells. Interviews with these groups resulted in identifying five major challenges in overcoming vacancy: bureaucracy and red tape, inadequate cash flows, access to capital, commercial readiness, and customer behaviors.

Absentee landowners and speculative investors deter development and delay opportunity.

Speculators and investors in vacant Detroit properties are waiting for the rest of the market to show signs of investment before funding improvements in their own properties. Absentee landlords make it difficult for community development groups to coordinate development efforts due to their lack of engagement or presence.

As noted in the *Vacant to Vibrant* study on commercial vacancy (2016), in a traditional real estate market, speculation leads property owners to invest and develop their properties with the belief that a property's value will

increase over time. In Detroit, however, property owners wait for properties in the surrounding area to improve before redeveloping. This creates a cycle of disinvestment, drastically slowing the redevelopment process.

Many existing and prospective retailers have low access to sources of capital and inadequate cash flows.

New and existing Detroit businesses have limited access to capital to start and improve their businesses. Businesses struggle to receive loans and outside funding, which creates difficulties for proprietors to grow and maintain their stores. This issue was identified in the *Detroit Strategic Framework Plan* (2012). The plan recognizes the struggle in obtaining financial resources through traditional institutions and recommends the city identify the alternative capital sources for real estate development properties.

When there is economic assistance, businesses may not be aware of the resources that provide alternative funding. According to the *Detroit Regional Analysis* (2012) prepared for JumpStart Community Advisors, the Detroit region was awarded \$194 million in small business funding from the federal government for innovation and technology transfer from 2006 to 2010. From large-capacity business incubators to microfinance firms, a range of entrepreneurial support exists in the Detroit region that is available to entrepreneurs. A review of the regional entrepreneurial and innovation ecosystem in Detroit reveals that there is a significant amount of financial support and resources available to entrepreneurs. Despite this abundance of resources, several focus groups reported that it can be difficult to make business owners aware of support available.

The Detroit retail market also frequently requires business owners to use a larger percentage of their own money to finance an investment in their property. According to the *Vacant to Vibrant* report, 75% of property owners interviewed for the study personally financed nearly all of their commercial property redevelopment. In a traditional real estate market, a lender will require only 10% of the project cost to be provided in the form of equity by the developer, while the lender will provide the remaining 90% in the form of a loan. In Detroit, where outside capital or traditional lending practices were difficult to obtain,

property owners often took it upon themselves to finance their project. Subsequently, this lack of available capital delays the development process, as it is regularly stalled in order for the property owner to raise the equity needed to complete the next step. If the equity is not raised or takes an extensive amount of time to accumulate, the vacant property is usually boarded up and abandoned. As reported in the *Detroit Regional Analysis: Demographics, Economy, Entrepreneurship, and Innovation* (2012), business owners also indicated that access to capital is a major hurdle. Business owners and entrepreneurs have a hard time securing long-term financing or loan amounts to build and grow their business operations or fund the tenant build-out. These hurdles create a multi-faceted challenge when local landowners and entrepreneurs attempt to develop a property or business.

Furthermore, the *Vacant to Vibrant* (2016) report indicated that property owners are hesitant to “white box” and improve their commercial spaces, as insufficient expected cash flows makes the activity appear to be cost prohibitive. The lack of a steady cash flow during retail space white-boxing significantly slows down redevelopment. Motor City Match aims to bridge this financing gap as a grant program that connects Detroit-based entrepreneurs and commercial property owners to provide financial and technical resources. From the inception of this program, \$16.3 million in grants has been leveraged to maximize growing businesses in the city’s commercial corridors.

Retail corridors are disconnected from the retail brokerage community.

The lack of knowledge within Detroit’s brokerage community is hindering the location of credit-worthy tenants in retail-appropriate spaces. Per the *Detroit Strategic Framework Plan* (2013), Detroit suffers gaps in local business services (such as brokerage) due to the dramatic employment loss. Additionally, commercial brokers are hesitant to show Detroit real estate to potential tenants because of the glut of space that exists in the region.

More easily leasable retail relies on a concentration of people living and working nearby.

The city is not as dense as it once was, per the *Strategic Framework Plan* (2013). From 1950 to 2010, Detroit lost 61% of its population. In 1950, Detroit had an average of

21 residents per acre and 5.7 occupied housing units per acre. In 2010, those numbers are less than half with 8 residents per acre and 3 occupied housing units per acre. The demand implications of this population decrease are that there is less density of spending and less supportable square feet of retail space. The challenge is to determine where to locate new retail nodes.

Parking is inaccessible or poorly designed.

There are several parking issues that negatively impact the development of retail in Detroit. Parking lots along some corridors are private and inaccessible to the public; street parking is not well marked; and, parking lots are often located between the road and the retailer, which can reduce storefront visibility and deter pedestrian traffic.

Multiple stakeholders elaborated during the focus groups on how parking problems inhibit retail success or growth. Josh Ellings from Jefferson East, Inc. described how private parking lots create the perception of a lack of parking. These lots facilitate an inefficient parking system and cannot be used by those patronizing the area.

Retail is not always being built to meet a market demand.

In markets throughout the United States, retail is being used in development strategies as an amenity for new residents or office workers, regardless of market demand. A primary issue with this strategy is that locating retail on the ground floor of a new building does not necessarily mean the retail is in a market-supportable location, clustered near other retail, or is adjacent to appropriate co-tenants, characteristics often necessary for retail to succeed.

This strategy was recommended in a recent Detroit study. The mixed-use and multifamily market analysis for six Detroit neighborhoods conducted by Capital Impact Partners recommends retail in their development plan. The study set out to determine the mixed-use and multifamily development demand and needs across the six neighborhoods, to include Grandmont Rosedale, Eastern Market, Vernor/Southwest, Livernois/McNichols, West Village, and Jefferson-Chalmers. An inclusive growth scenario was performed for each neighborhood to determine the potential density capacity based on the Detroit Future City 10-year land use plan. This report states that each area contains a mixed-use commercial corridor

suitable for multifamily development and the residential development plans for each neighborhood include between 4,700 and 10,000 square feet of retail. While the location of these proposed mixed-use developments has yet to be determined, there is a chance that available locations for a new residential development may not be in the same location as the recommended location for a retail cluster.

While the square footages for these recommendations are small in scale, the immense oversupply of retail space throughout Detroit and the overall lack of clustering implies that merely putting retail on the ground floor of a new development does not guarantee that the space will be leased or that a potential tenant will be successful. Other uses, such as community spaces, clinics, or public gathering spaces, are alternatives for ground floor spaces that still provide activation without relying on a commerce-driven retailer subject to market conditions.

Rezoning B4 to B2 will increase retail development.

Commercial zoning along thoroughfares is problematic for developing a strong retail market, particularly in a dramatically over-supplied market like Detroit. Recommending a transition from B4 to B2, like in the *Jay-Southfield Going Green for Growth report*, does not solve the lack of targeted retail investment and growth. Changes in zoning to emphasize the development of “true” retail uses should also be coordinated with targeting intersections or existing clusters, rather than a blanket rezoning that will not encourage businesses to group at appropriate intersections.

A FEW RETAIL CORRIDOR STAKEHOLDERS

In order to build a thriving retail ecosystem in Detroit, it is essential to include multiple stakeholders throughout the process. The perspectives of a wide body of stakeholders ensures that a comprehensive retail strategy addresses the needs of many members of the Detroit community. This section of the report outlines the role of each stakeholder group when developing a thriving neighborhood retail environment.

Stakeholders were included in one or more of the following categories:

Public

Public entities, such as the City of Detroit's Planning Department, Housing Revitalization Department, the Detroit Land Bank Authority and Mayor's Office, were instrumental in providing insight on the individual neighborhoods. Concurrent efforts complimentary to retail attraction and development include walkable neighborhood framework planning, workforce development, boosting the economic mobility of Detroit's residents and housing stabilization.

Philanthropic

Detroit has a rich network of philanthropic organizations working to help revitalize the city and many have been engaged in neighborhood stabilization for decades. Foundations like the New Economy Initiative and the Kresge Foundation have often funded previous reports studying local economic development initiatives and were valuable sources of data, which informed much of the report's contextual foundation.

Place-Based

This study would not have been possible without the insight and guidance of place-based partners; namely the community development corporations and other non-profits throughout the city dedicated to maintaining neighborhood quality of life. These partners include groups like Joy-Southfield CDC, Church of the Messiah, Osborn Neighborhood Alliance and Grandmont Rosedale Development Corporation. These organizations have pioneered the revitalization and redevelopment activities of their neighborhoods through programming, marketing, and development activities.

Resource Providers

Non-profit organizations providing resources to small businesses and economic development in Detroit, regardless of neighborhood, include (but are not limited to) TechTown, Detroit Future City, Invest Detroit, Michigan Community Resources, the Detroit Creative Corridor Center and the Detroit Economic Growth Corporation itself. These resource providers work directly with Detroit's small business community, partner with potential investors, technical service providers, and community mentors to aid small business development, commission studies and emphasize entrepreneurial growth.



RETAIL FUNDAMENTALS



INTRODUCTION

Population changes, industry shifts, and automobile-oriented development patterns continue to negatively impact retail districts across the nation, regardless of socio-economic status. In many of these cities, including Detroit, the infrastructure built decades ago has been slow to adjust to new economic realities. In the 1950s, at Detroit's peak population, retail lined almost every major corridor. Many shops have since shuttered leaving vacancy and blight scattered throughout the city.

Conditions of vacancy and blight are detrimental to neighborhood character and pride, and also to businesses that remain. By operating next to a vacant or blighted building, retailers are limited. The street can feel “unmonitored” and therefore, unsafe. Additionally, operating businesses struggle in isolation.

Detroit now has an opportunity for its commercial corridors to adjust to new market realities, to focus initial investment into retail districts, and to break the cycle of disinvestment. This approach will foster retail clustered into districts — rather than scattered along corridors alongside vacancy and blight — that are both vibrant and market-supportable. After all, a vibrant, bustling retail district is not measured by the size of the district, but the character of the street.

Outside of these clustered retail districts, commercial buildings should be occupied by non-retail uses (such as offices, residential buildings, and hotels) to achieve “retail-like” street activation and vibrancy through strategic design, which is also covered in detail in following sections.

RETAIL BEST PRACTICES

The amount of retail space in the United States is estimated at 13 billion square feet (CoStar Group, Inc., 2017). The United States has the largest ratio of retail per person (23 square feet) of any country in the world.

In January 2017, the CoStar Group released a report estimating that approximately 1 billion square feet of retail space would need to be repurposed or demolished to return the US retail market to a balanced amount of supply and demand. The expression of oversupply is that expenditures are distributed among more stores than sales can adequately support. As a result, stores that are failing to reach a sustainable rate of sales per square foot ultimately close. In an oversupplied environment, store closures occur with greater frequency until the market has reduced the supply to a point where equilibrium is achieved.

The conditions for developing successful retail in Detroit are the same for developing retail in any other market. Retail will function best when it is market appropriate, suited to the demand of the surrounding population, and located in a safe and accessible environment. In order to understand the potential for retail development in the various study areas, it is important to first examine how Detroit-specific market conditions affect retail.

Planning for retail market demand.

People spend their time in three primary places: their home, their place of work, and a “third place” (typically a shop or retailer in their community). This third place is where people socialize, make connections, and foster a sense of neighborhood spirit and identity. Social engagement often occurs in coffee shops, at the dry cleaner, in grocery stores, and in apparel shops. In this way, retail often serves as a critical component of a community's social fabric. Although most Detroit neighborhoods still achieve these benefits in schools, churches, and community centers, many Detroit neighborhoods lack the retail form of this third place.

When developed successfully, retail has the potential to serve as the glue that holds people together. Customers are adversely sensitive to the “wrong place”, is the “wrong size”, or is the “wrong type” of retailer. These factors, coupled with the post-recession trend of declining supportable retail square footage and the amount of available retail space throughout Detroit, increase the need for informed and market-appropriate retail development.



Retail is perceived in four ways:

- **As community identity:** residents, employees, and visitors, among other consumer groups, use retail to define their neighborhood (e.g. I live near Craft Work in the Villages)
- **As an amenity:** retail is viewed similarly to a building's gym or business center and other common spaces. This characteristic is especially true for mixed-use buildings with retail on the ground floor (e.g. I must have a coffee shop in my office building)
- **As a tax generator:** jurisdictions perceive retail sales and real estate tax as a benefit to its tax base
- **As a civic use:** retail serves as a "third-place" (a social environment outside of home and school/work, the first and second places respectively)

Each of these uses is secondary to **retail's primary function as a commercial business.**

A retailer's success is determined first and foremost by its ability to generate enough sales to sustain itself. When considering whether a location is appropriate for retail use, the primary focus for the retailer is on whether market conditions and the space will foster an appropriate level of sales. This is particularly true for national retailers, which have strict site selection criteria.

When planning for retail in a community, it is important to not take an idealistic view of what is possible. Communities are capable of supporting a specific amount of square feet of retail that they can sustain. Recognizing holes in the existing supply, emphasizing locally-serving establishments committing to making a vibrant district out of a sustainable amount of retail space - no matter how small or large - will result in a commercial district worthy of neighborhood pride.

THE FOUNDATIONS OF RETAIL

Vibrant retail districts come in all shapes and sizes, serve different purposes, and appeal to a variety of customers. Additionally, retailers consider a predetermined set of factors during the site selection process that are unique to their business model. For example, a regional grocery store or big box retailer may be looking to expand in a suburban market along a commuter corridor with high traffic counts, while a restaurant is looking to locate in urban markets with high office and residential populations in an urban, pedestrian-oriented environment. Regardless of the retail typology, there are common elements that are considered the best practices for creating a high-functioning, retail environment. The following attributes contribute to the success of a retail environment:

- Minimum level of neighborhood residential density to generate enough sales to support a retail cluster
- Neighborhood employment/daytime population density
- Appropriate traffic counts
- Traffic speeds that do not create feelings of discomfort for pedestrians and bikers
- Appropriate street parking and parking adjacent to storefronts

Safety

Regardless of the crime statistics for a neighborhood, successful retail corridors maintain a perception of safety. From a retail district in the urban core of a major metropolitan city to a suburban shopping center, this is a critical factor for creating a vibrant retail district. Several factors contribute to establishing the perception of safety, which include building height, vacancy, and lighting. In urban neighborhoods, the perception of safety is increased on retail streets that contain buildings between 2 to 6 floors with active uses above the ground floor retail space, such as office or residential. Across all retail typologies, low vacancy rates and well-lit sidewalks and storefronts increase the perception of safety along retail corridors. Finally, buildings and landscaping should be designed to limit “dark corners.” The biggest deterrents to crime, especially property crime, include clear sightlines, street and storefront lighting, and a general sense that the community and jurisdiction is involved in maintaining safe streets, indicated by minimal litter and vandalism. Visible vandalism is an indicator that crime occurs in the area and is a psychological deterrent for potential customers.

Management Organizations

For retail, the fourth level of public economic development efforts, after federal, state, and city governments, is the formation of a local retail organization that promotes business development and investment within a distinct commercial district. Successful retail districts are supported by this type of organization via an active Business Improvement District (BID), Principal Shopping District, Merchants’ Association or Non-Profit Organization. These organizations provide clear leadership and serve as a surrogate for single landownership. This factor is especially critical for urban districts and main streets, as several individual owners hold property interest in a single block, an environment commonly found in Detroit. Unlike urban and main street retail environments, suburban shopping centers are typically larger in land size and are owned by a sole entity. Storefront and streetscape improvements, among other initiatives, are more easily implemented through a single entity, in comparison to coordinating many individual property owners. Finally, these organizations can perform retailer specific exercises to bolster performance levels and boost retail sales, such as the Grocery Enhancement Audit. This audit is a nonbiased review of operations, merchandising, and fundamental requirements to a successful retail business to include visibility, accessibility, and safety.



Investment

A successful retail district is likely to show signs of investment, either by the public or private sector. Examples of these investments can include major development, streetscape investments, public art, and removal of above-ground power lines, to name a few.

Walkability

In Detroit, improving walkability is especially relevant, as a significant portion of households do not have access to a vehicle. In all retail environments, ideal sidewalks should be of adequate width (6 feet or more) to allow the clear passage of opposing pedestrians. In urban retail districts and neighborhood main streets, urban design should foster walkability within the retail district, with streets connecting the retail core to the surrounding neighborhood.

Contiguous Storefronts

Successful retail districts are characterized by contiguous storefronts, also known as a retail clusters. This retail structure encourages customers to shop at more than one retailer per visit. Not only do customers enjoy a 'one stop shop' for their goods and services, retailers and businesses thrive in a centralized structure. While individual retailers are competing for market share, retail clusters, especially in urban neighborhoods, help guarantee a level of traffic that might not be achieved if the retailer is located alone in a given area. Additionally, these retail clusters often serve as places where the community gathers for shopping, entertainment, and socializing. Retailers and the community alike reap the benefits of strategic planning and regulations that foster and preserve these clusters.

In urban markets and on main streets, these contiguous retail strips line both sides of the street, creating retail "rooms". In suburban markets, contiguous retail clusters front the primary road. In Detroit, it is common for the side of a building to front the roadway, breaking up retail continuity along the corridor. Additionally, residential blocks, massive intersections, long strips of pad sites and curb cuts, and clusters of non-retail uses disrupt retail continuity, potentially hindering impulse sales and long-term viability.

Conversations with several focus groups have illuminated the fact that Detroit customers are less likely to frequent a retailer if it is isolated along a block or neighboring a use that does not encourage a high level of comfort while shopping, such as a vacant lot or blighted storefront. Retail clustering that improves aesthetics block-by-block, rather than storefront-by-storefront, is a more strategic means of creating a retail destination that encourages lingering and shopping for multiple items and services. Having more retailers together also increases the amount of "eyes on the street," which can foster a sense of security and safety for customers and increase overall foot traffic. Pedestrians walking along a retail block can wander and window shop, consequently supporting neighboring businesses. These benefits are not possible when retailers remain isolated along each retail corridor.

This strategy is challenged in Detroit by a lack of quality building stock as well as the scattering of existing businesses along the corridor. These conditions will need to be addressed head-on to progress towards developing concentrated retail districts.



The Impact of E-Commerce

The world of e-commerce is drastically changing everything about the retail economy, from the way customers shop to how new retailers enter the market. The growth of online shopping has increased the overall amount of competition, which has played a role in driving retailers that were top performers in the 1990s out of business.

Throughout the evolution of e-commerce, General Merchandise, Apparel, Furniture & Other (GAFO) retailers have been hit the hardest. Customers shopping for goods within this category complete many fewer trips and purchase larger basket sizes. With this profile, customers are likely to seek the best price and highest quality, which now is much easier to find online. This market reality is reducing the size of large-format stores due to the rising inability of even national retailers to maintain the size of storefronts that were common before 2008. Shopping centers thus will likely be less focused around a large retail anchor, and increasingly suited towards a walkable, high-quality, convenient multi-stop retail experience for customers.

This effect can be seen in Detroit in the market pressure to redevelop malls, such as Northland Center Mall, and the inability for some large format retailers such as Best Buy to expand or even remain sustainable in Greater Detroit's retail market. In the long term, the implications for retail could be seen in the continued reduction of square feet of retailers in the GAFO category. This anticipated reduction will have implications on the appropriate size of developed retail storefronts and parcels as overall retailer square footage continues to shrink. One way to address this issue is to develop concentrated retail districts where each tenant is provided a greater chance of success due to being part of an intentional retail cluster. Also, developing buildings that are designed for longevity and have flexible build-out uses are an appropriate way to allow storefront space to adapt to new uses, as retail needs change in the coming years, and even decades.

Dense, Centralized Locations

Generally, retailers thrive when they are centralized. Consumers enjoy a 'one stop shop' for their goods and services, and this retail structure encourages customers to shop at more than one retailer per visit. These retail clusters often serve as places where the community gathers for shopping, entertainment, and personal interactions. Retailers and the community alike reap the benefits of strategic planning and regulations that foster and preserve these clusters.

Mix of Local and National Retailers

Traditionally, main streets thrive when occupied by a mix of local and regional tenants, while destination retail streets, primarily found in urban retail district and selective suburban areas, are occupied largely by national tenants. In Detroit, local and regional tenants have also thrived in suburban retail districts. Many benefit from co-tenancy with national retailers whose successful brand recognition draws customers into the center. Local and regional retailers are successful in urban and main street retail districts because they depend on generating sales through the high pedestrian counts in these retail environments, increasing the importance of walkable retail districts. Car-centric customers dominate suburban retail markets and are less likely to make spontaneous, impulsive retail purchases.

Accessibility

Retail establishments along a successful retail districts are well-served either by the pedestrian network, transit, or adequate parking facilities, depending on the retail typology. As suburban retail markets primarily serve the auto-oriented customer, adequate parking is necessary in creating accessible retail. Providing safe, designated sidewalks ensures accessibility and promotes walking from one retailer to another. Main streets and urban districts depend on pedestrians, and benefit from well-designed pedestrian infrastructure such as wide sidewalks, ADA-compliant ramps, seating along the corridor, and designated crosswalks.

Visibility

For a retailer, regardless if they are a national or local tenant, visibility is of utmost importance to ensure customers can clearly identify the storefront, understand what they sell, and be enticed to make a purchase. In urban and main street retail markets, retailers benefit from pedestrians who, unlike those traveling by automobile, have a longer window of time to experience each storefront. The customer will easily identify the store based upon clearly and uniformly identified street numbers, varied signage, and large storefront windows. In suburban retail environments, which are dominated by car-centric customers, storefronts should face the primary road and should have prominent roadside signage, especially for retailers located in shopping centers that are not immediately visible from the street.



Appropriate Space

Retail space exists in many different forms, from new-to-market ground floor retail space in an urban area to an aging suburban shopping center along a major thoroughfare. The quality and, more importantly, the usability of the retail space is the cornerstone to a successful retail district and is a critical consideration for potential retailers. National retailers have spent years, oftentimes decades, testing and analyzing site features and capabilities to determine the requirements that maximize profits. For example, national restaurant retailers require specific venting systems and kitchen build out capabilities, while grocers and department stores require an adequate number of loading docks, back of house storage space, and surface parking. Quality of the retail space is also considered by retailers. A discount store, whose key values and brand identity include providing goods with a focus on price, would locate in a Class B or Class C shopping center. On the other hand, fine dining establishments seek Class A restaurant spaces, as customer experience and perception drive their key values. Usability and quality of a retail space can be modified to fit specific tenant requirements, but modification requires additional financial resources.

Small Businesses Are on the Rise

Despite the current retail economy, small businesses are experiencing a renaissance. This renaissance is characterized by a rise of entrepreneurship (both online and in brick and mortar locations), by the growth of local and regional chains, and by a shift towards convenience and essential retail. These retailers are highly in tune with their communities, and are able to uniquely cater their goods and/or services for their clientele. Retailers such as Detroit Vegan Soul in West Village identified unmet retail needs in their communities and positioned themselves appropriately.

The “Made in Detroit” maker economy (breweries, distilleries, food trucks, craft merchants, and others) has also claimed a growing share of expenditures by creating distinctive experiences on-site and building relationships with their customers. This condition has contributed to the rise of food halls, co-working facilities, and maker-spaces, along with the resurgence of farmer’s markets. As operating costs of these spaces are shared and they rent for lower prices, they pose a lower risk for smaller businesses.

Despite retail entrepreneurial growth, there are no guarantees for retail success, especially during periods following economic recessions. For Detroit, the small business survival rate is 48.51% (Kauffman, 2016). As previously mentioned, retail must serve as commerce, securing enough sales to cover overhead expenses (labor, materials, etc.). To aid in long-term financial viability, many retailers pursue an omni-channel retail strategy, defined as the use of several mediums to sell a good (brick and mortar storefronts, online stores, mobile carts, and any other method of transacting with a customer).

Cotenancy & Competition

Cotenancy, the term used to describe the combination of retailers located nearby, is a factor that impacts the success of retail districts. The merchandising mixes in most successful retail districts have a prevailing retail category (NG&S, F&B, or GAFO) with smaller percentages of tenants from the other two retail categories. Typically, retailers look for sites that have a tenant mix with uses that would complement their business. For example, it is unlikely that a national clothing brand would select a site amongst dry cleaners, nail salons, and grocery stores, as these retailers cluster to provide everyday goods and services. For these reasons, landlords and property owners should carefully select tenant mixes supported by market data with these best practices in mind.

In urban markets, full-service restaurants and bars cluster together, creating a restaurant district. Clustering allows for restaurants to thrive, as if one has a long wait, there are other nearby options. Additionally, diners and shoppers favor retail clusters because they are offered a variety of choices.

Experiential

Increasingly, more items are easily bought online at a better value than in stores. Consequently, retailers are having to find new ways to attract customers to their stores. In order to draw customers into their stores rather than lose them to online shopping, retailers are offering complementary products and services on their site. This is evident at Shinola Detroit, which offers bicycle repairs at its Midtown location, a service that not only attracts a different segment of customers, but entices them to linger longer.

Centers are changing the definition of an “anchor” from a large-format store or grocery store to an alternative use, such as a medical facility, an outdoor dining opportunity, or even a climbing gym. Bloomberg reports that the number of walk-in clinics in malls has risen 11% since 2011. These non-retail uses drive traffic to the adjacent retailers, while also serving the community or providing an experience that cannot a customer cannot achieve online. Allowing owners to explore creative uses for their spaces is a way to distinguish brick and mortar stores and shopping centers from online competition.

The importance and relevance of experiential retail is evident in the success of downtowns and main streets across the nation. Components that are pedestrian-oriented, with visually appealing storefronts, outdoor seating, and a varied tenant mix, all contribute to the sense of a vibrant retail corridor where people want to linger. Shopping centers found along the corridors studied continue to fill a need, but highly competitive and successful retail centers have a true sense of place and foster a community interacting and engaging with one another. Stakeholders from Rosa Parks echoed this sentiment, requesting space for the community to gather, both outdoors and in.

Flexible Design

At its core, retail is about the customer, and the future of retail will evolve around this relationship. Just a few decades ago, consumers favored shopping malls, driving millions of square feet of retail into shopping malls built to last 100 years. Today, consumer demands have shifted and retailers have responded by moving out of shopping malls and into walkable town centers. While some malls have adapted to new trends by incorporating more daylighting, fresh graphics and improved décor, and street-like food courts, some malls are unable to adapt, denoted by immense vacancy. The cornerstone of creating a sustainable retail district that can weather the ever-changing trends of retail is flexibility in building design.

Flexible building design allows retailers to easily grow or contract within the building and storefront designs can be easily changed and modified as one retailer moves out and another opens. Furthermore, should retail demand contract in the future, unused retail space and oversupply can be easily converted into office or residential space.

ACTIVATING SPACE WITH NON-RETAIL USES

Under conditions where the available retail space exceeds demand, non-retail users may occupy locations identified with retail tenants (storefront spaces, in particular). Non-retail users found in storefront locations include professional offices (attorneys, accountants, architects, engineers and similar), automobile service centers, daycare/educational facilities, religious facilities, government offices, funeral homes, and even private residences. These tenants are characterized as “non-retail” because each is generally not open to the public, has limited hours of activation, does not offer goods or services without prior appointment, and infrequently uses the storefront area for display purposes.

For these neighborhood commercial corridors, ground floor spaces located outside of the retail nodes need to be targeted for occupation by non-retail uses. The most common non-retail uses that have the ability to locate in retail spaces include medical and professional offices, education spaces and studios, as well as community and religious spaces. The following design features are recommended to ensure non-retail uses organically promote continuous activation and vibrancy of the street in the absence of a true retail use; these principals can be applied in both suburban and urban markets.

Office Uses

Building design can capitalize on the natural activity within office buildings by increasing the visibility on the ground floor and providing for places to gather next to and in-between offices. Providing direct street access to ground level tenants that have a higher level of activity can also activate street activity similarly to retail.

Office lobbies should use large windows with glass frontage on the ground floor to create a sense of activity and movement. Co-working offices, particularly on the ground floor, can similarly drive movement in and out of the building and create opportunities for gathering. Finally, tenants with frequent visitors (e.g., medical and accounting offices) as well as building amenities (such as fitness centers) should be located on the ground floor and provided with direct street access when possible.

Other Uses

Community spaces, medical offices, and similar uses can follow these same design principals to encourage street activation and vibrancy. Front lobbies and lounge areas create retail-like storefronts with community-branded graphics and logos. Blinds and dark or reflective glass should be used sparingly, allowing the pedestrian to see active lobbies, front desks, and waiting rooms. A-frame signs can be placed on the sidewalks to advertise services offered in the building.



MARKET ANALYSIS



INTRODUCTION

The following market analyses calculate the amount of supportable demand for 13 neighborhoods (as defined on the next page).

Each section details the corridor's history, the rationale for determining the corridor boundaries of the area, existing retail supply, a trade area analysis, a map of the area, a demographic analysis, and a population change explanation. Each section aims to provide context and understanding of what neighborhoods and residents are able to support. The corridor studies offer conclusion and recommendation matrices (action items, priorities, and responsible parties) for each neighborhood.

In this document's Technical Appendix, neighborhood-specific and citywide strategies are combined in a comprehensive matrix that shows how similar strategies can be effective from one neighborhood to the next, based on their common characteristics.

Trade Areas

Trade Areas identify where the corridors are likely to draw sales from customers. A primary trade area (PTA), secondary trade area (STA), and if appropriate, tertiary trade area (TTA) are determined for each corridor. The PTA identifies the segments from which the corridor's establishments draw a majority of their regular sales.

Boundaries for trade areas are impacted by competition, drive times, sociological and geographical boundaries, shopping patterns by customer type, pedestrian volumes, and other similar factors. Detroit's street grid community typology, highway placement, and retail development history significantly impact the trade areas. Furthermore, car ownership rate and transit access, availability of time and financial resources, and other socioeconomic characteristics were also considered.

While conducting the trade area analysis, reports by JP Morgan Chase and Michigan Community Resources (MCR), were reviewed to ensure that the nuances of Detroit's customer shopping patterns were fully considered. *Going the Distance: Big Data on Resident Access to Everyday Goods*, a report compiled by JP Morgan Chase, outlined the distance between home and merchant by retail category (JP Morgan Chase & Co. (2017), *Going the Distance: Big Data on Resident Access to Everyday Goods*).

- Neighborhood Goods & Services (NG&S): Pharmacies contribute to the lowest distance traveled at an average of 0.9 miles between resident and merchant. Grocers are slightly further, at a 1.4 mile average. The majority of residents in each category do not travel more than 3 miles for goods in services within this category.
- Food & Beverage (F&B): Restaurants average 2.4 miles between resident and merchant. This category includes both full-service and fast food restaurants.
- General Merchandise, Apparel, Furnishings & Other (GAFO): The two categories of goods were studied in the report, nondurables and clothing, represented an average distance traveled of 2.2 and 3.8 miles, respectively.

The findings from this report reinforce industry standards, that state that people are willing to travel the furthest to GAFO retailers and the shortest distance to NG&S businesses. This condition is a factor of a retail system where the average frequency of visits and total sales per customer dictate the amount of supportable retail.

OVERVIEW OF STUDY AREAS

Building upon the Mayor’s initiative to create more walkable communities in targeted nodes, the Detroit Economic Growth Corporation (DEGC) in partnership with Streetsense outlined thirteen target neighborhoods and delineated their boundaries to include:

- Banglatown
- East Warren
- Islandview – Greater Villages
- Jefferson – Chalmers
- Joy-Southfield
- Livernois – 6 Mile
- Northwest Grand River
- Osborn
- Rosa Parks – Clairmount
- Russell Woods
- West Vernor Corridor – Mexicantown
- West Vernor Corridor – Springwells
- West Warren



BANGLATOWN

CORRIDOR HISTORY

The Banglatown study area lies along the border of Hamtramck and Detroit. In the early 1900s, this area grew significantly with the opening of the nearby Dodge and General Motors plants. Originally a haven for Polish immigrants, this neighborhood is growing into a hub for immigrants from South Asia, particularly Bangladeshis. Many of the businesses along this corridor are owned and run by these new families. In an effort to capitalize on the influx of new residents, the area is embarking on a branding effort, similar to the initiative undertaken in the 1990s in the neighborhood that is now known as the West Vernor Corridor - Mexicantown. Branding efforts will further highlight the restaurants that serve as a destination to all Detroiters.

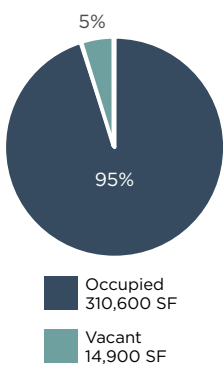
CORRIDOR BOUNDARY RATIONALE

The boundaries for the Banglatown study area corridor includes retail that is within the City of Detroit's boundaries and is clustered along Conant Street. For customers, this corridor is psychologically associated with Hamtramck.

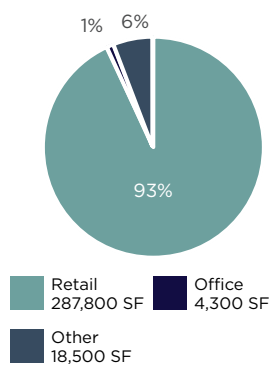
EXISTING RETAIL SUPPLY

As its name suggests, Banglatown is home to many Bangladeshi retailers, primarily in the Neighborhood Goods & Services (NG&S) category. Within the study corridor, there is 325,500 square feet of retail-appropriate space, and 166,600 square feet of that space is occupied by butchers or specialty grocery stores. The large amount of specialty retail is creating a shopping destination that serves both the nearby population and customers beyond the neighborhood. While specialty goods targeting the Bangladeshi community are widely available, stakeholders have expressed that Banglatown lacks a significant number of retailers that provide general purpose goods and services.

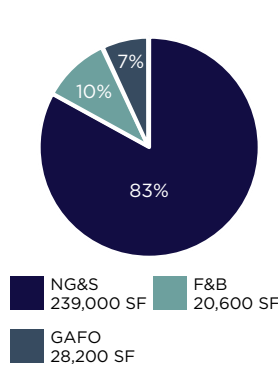
Occupancy Rate



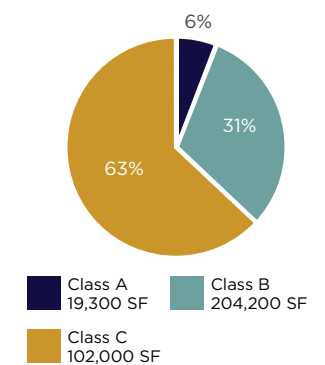
Tenant Type Distribution



Retail Type Distribution

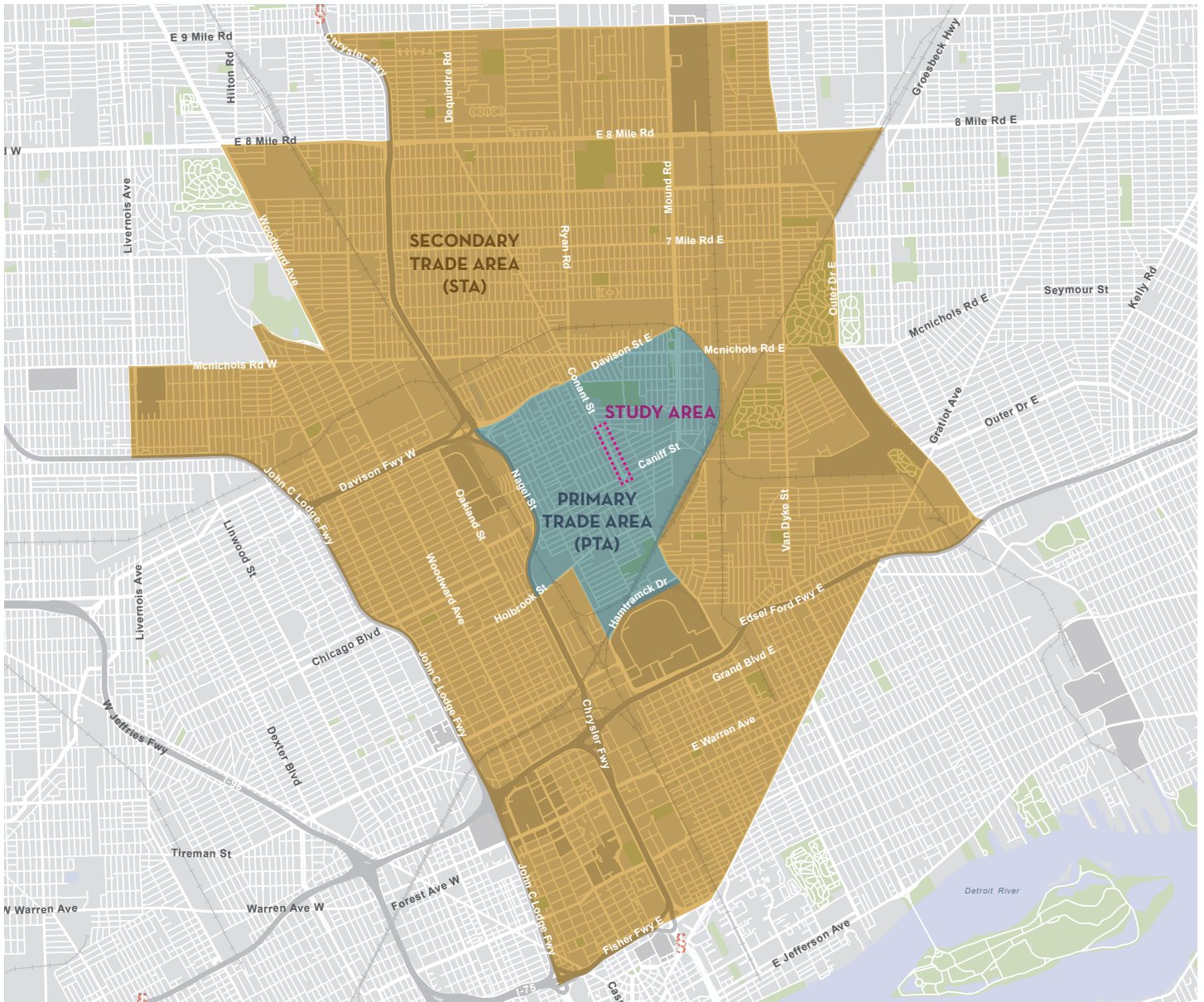


Class of Space Distribution



TRADE AREA ANALYSIS

For Banglatown’s study area, trade areas were determined using an approach unique to this neighborhood. The Bangladeshi-owned retail services the local residents and has grown into a destination for residents throughout the city. To determine the Primary Trade Area, Streetsense conducted a demographic analysis. This analysis selected Census blocks with concentrations of 15% or more of the population denoting their ethnicity as Asian Indian (which includes Bangladeshi) to identify portions of the surrounding community likely to shop at the retail within the commercial corridor on a frequent basis. For the Secondary Trade Area, a 10-minute drive time as well as the proximity of competing ethnic retail nodes in West Warren and Dearborn were considered.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	30,779 (14% decrease, 2010-2017)	125,206	658,250
Households	10,801	49,951	252,089
Median Age	30	35	35
Median Household Income	\$26,327	\$23,820	\$27,372
Primary Nonwhite Ethnic Group	54% (Other*)	76% (Other*)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	17%	19%	20%
Single Parent Family Households	19%	33%	31%
Average Number of Vehicles per Household	1.2	1	1.2
Households Without Access to Personal Vehicle	19%	31%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).

*The US Census Bureau does not include Bangladeshis as an ethnic category, meaning that Banglatown's Bangladeshi population is classified as "Other."



MARKET ANALYSIS CONCLUSIONS

Banglatown’s retail sales are primarily associated with local neighborhood convenience spending and customers from throughout the region who seek out the neighborhood for religious institutions and ethnic retail services. This unique point of market distinction results in a total supportable amount of retail space of approximately 307,100 square feet.

The amount of retail supportable in this commercial corridor is largely dependent on the type and quality of tenant that can be attracted. The culture of locally-owned, independent retailers within Banglatown has fostered a retail node likely to continue attracting independent businesses. Supporting local businesses through efforts to continue clustering and providing assistance with completing building improvements and maintenance will be critical in continuing to support retail growth.

- Neighborhood Goods & Services (NG&S):

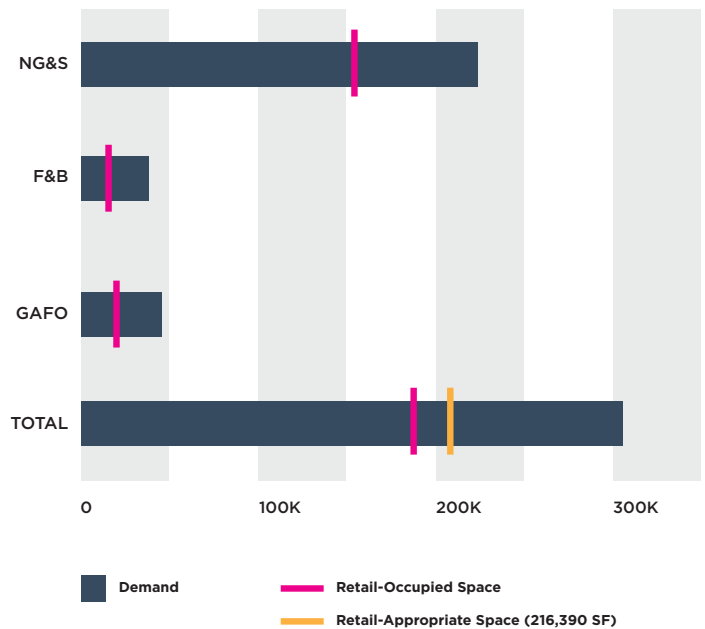
The majority of the corridor’s demand lies in the Neighborhood Goods & Services category. Bangladeshi Grocers account for the majority of occupied space, while there are few pharmacies, barbers, salons, and other Personal/Household Care Goods and Services tenants. Diversifying the NG&S retail mix to include some other convenience retail will increase overall NG&S access in this study area.

- Food & Beverage (F&B):

There is an opportunity for more Food & Beverage retailers. The existing demand can especially support more fast-food/carry-out retailers and future retail strategies should support the development of these types of businesses.

- General Merchandise, Apparel, Furnishings, and Other (GAFO):

No additional GAFO retailers are market supportable at this time.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	223,210	152,520
F&B	38,077	15,720
GAFO	45,836	19,575
TOTAL	307,123	187,815
	VACANCY RATE	4.58%

Supply and demand figures are modified to adjust for market conditions specific to Banglatown. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

BANGLATOWN’S SUCCESS CAN BE BOLSTERED BY IMPROVING ACCESSIBILITY AND DIVERSIFYING THE RETAIL SUPPLY.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
Food At Home	\$30,201,943	114,802
Alcohol at Home	\$1,304,540	3,729
Personal/Household Care Goods and Services	\$31,886,552	99,271
Pet Food & Services	\$1,133,844	5,369
NG&S SUBTOTAL	\$64,539,175	223,210
Full-Service	\$5,878,990	16,848
Fast Food	\$7,168,399	17,688
Alcohol Away from Home	\$705,386	1,384
Snacks & Non-Alcoholic Beverages	\$756,588	2,058
F&B SUBTOTAL	\$14,546,916	38,077
Home Furnishings	\$2,568,782	13,042
Apparel	\$5,401,307	22,871
Electronics	\$1,791,705	2,218
Sports Equipment	\$470,628	2,377
Books, Music & Other	\$364,362	2,253
Pet Supplies	\$240,208	1,236
Automotive Equipment	\$319,646	1,752
GAFO SUBTOTAL	\$11,184,425	45,836
TOTAL GENERATED RETAIL DEMAND:	\$90,270,516	307,123

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

BANGLATOWN

The following list of recommendations seeks to consider the factors that impact Banglatown's retail environment, such as meeting market equilibrium, improving physical conditions, initiating marketing campaigns, and activating streetscapes. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Create a Micro-BID, business association, or a main street program. Integrating a coordinated effort for this commercial corridor into a comprehensive citywide initiative should be a priority.	1
	Coordinate retail development efforts across jurisdictions (Hamtramck and Detroit). The area's customers do not perceive the border between Hamtramck and Detroit along Conant Street as a restrictive border. Both sides of the border could benefit from shared resources, such as funding, staff, and/or marketing campaigns to create a unified district. Specifically, explore producing a guidebook that aids in navigating the process of establishing a brick and mortar business on both sides of the city's border.	2
PLANNING	Clearly delineate Retail Priority Blocks for Banglatown's commercial corridor, in and outside the city of Detroit's boundaries. Detroit city resources should be focused on the 6 blocks along the west side of Conant Street between Casmere and Carpenter Streets.	1
	Pursue infill development strategies to activate gaps in Banglatown's retail environment, prioritizing the block between Eldridge and Carpenter Streets.	2
	Design gateway enhancement elements into Banglatown's commercial district. A coordinated streetscape program for this neighborhood should be pursued with extensive input from the business owners. Banglatown should be identified as a highly-specialized shopping destination.	3
SMALL BUSINESS	Secure additional tenants and/or aid business owners in creating merchandising mixes that provide general goods and services to better serve both customers of Bengali origin and others. Retailers may include flower shops, a dollar store, etc.	1
	Communicate a sense of "welcome and open for business" to a diversity of customers by urging retailers within Banglatown to consider improvement opportunities in their signage, storefront design, and overall external messaging.	2

	RECOMMENDATION	PRIORITY LEVEL (1-3)
PROPERTY OWNERS	N/A	N/A
MARKETING	<p>Reinforce Banglatown's identity as a hub for newly-arrived immigrants to Detroit by translating signs, menus, sales instructions, and other assistance materials to Bengali.</p>	2
SAFETY	<p>Explore ways to provide greater sense of comfort for Bengali women. During stakeholder outreach, a need for increased safety in the community arose. To provide for this segment of the population, improved transportation options (such as rickshaws/pedicabs) and possibly women-only hours for stores should be considered. Additionally, ensure stores have clear sightlines inside and out, visible security cameras, and limited distress with an appropriate balance of clear sightlines and cultural sensitivity to promote Banglatown as a safe place for women to shop.</p>	2

EAST WARREN

CORRIDOR HISTORY

The East Warren study area is located at the Detroit/ Grosse Pointe border, built on top of what once were ribbon farms. Farmland gave way to densely built neighborhoods comprised of custom-built homes constructed between 1913 and 1950. This neighborhood has weathered the storm of the foreclosure crisis better than others, in part due to the high-quality construction of the homes. Community anchors, particularly the Alger Theater, have contributed to maintaining a sense of community identity.

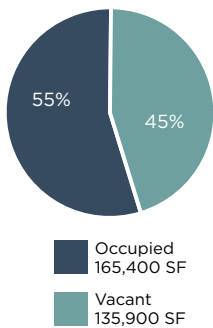
CORRIDOR BOUNDARY RATIONALE

The commercial corridor for East Warren includes an agglomeration of several neighborhoods that form a singular commercial environment. The study area corridor is contained along East Warren Avenue and is bookended by Balduck Park to the east and Devonshire Road to the west.

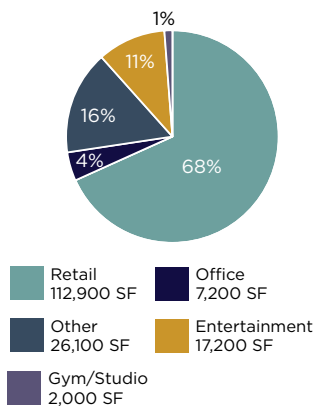
EXISTING RETAIL SUPPLY

The East Warren commercial corridor contains 301,300 square feet of retail-appropriate space. The retail mix contains in-line retail with little to no setback from the street, strip centers, historic storefronts, and small pad site retailers (such as Dollar Tree) that have adjacent parking. The retailer type that comprises the most square footage is the Hardware, Home Goods, and Appliances category, followed by Beauty and Nail Salons, and then Sit-Down Restaurants.

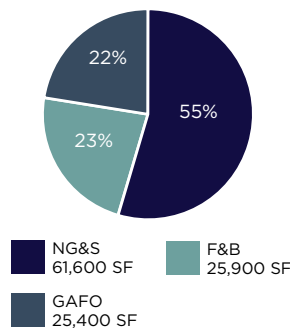
Occupancy Rate



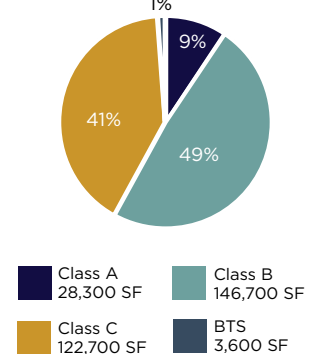
Tenant Type Distribution



Retail Type Distribution

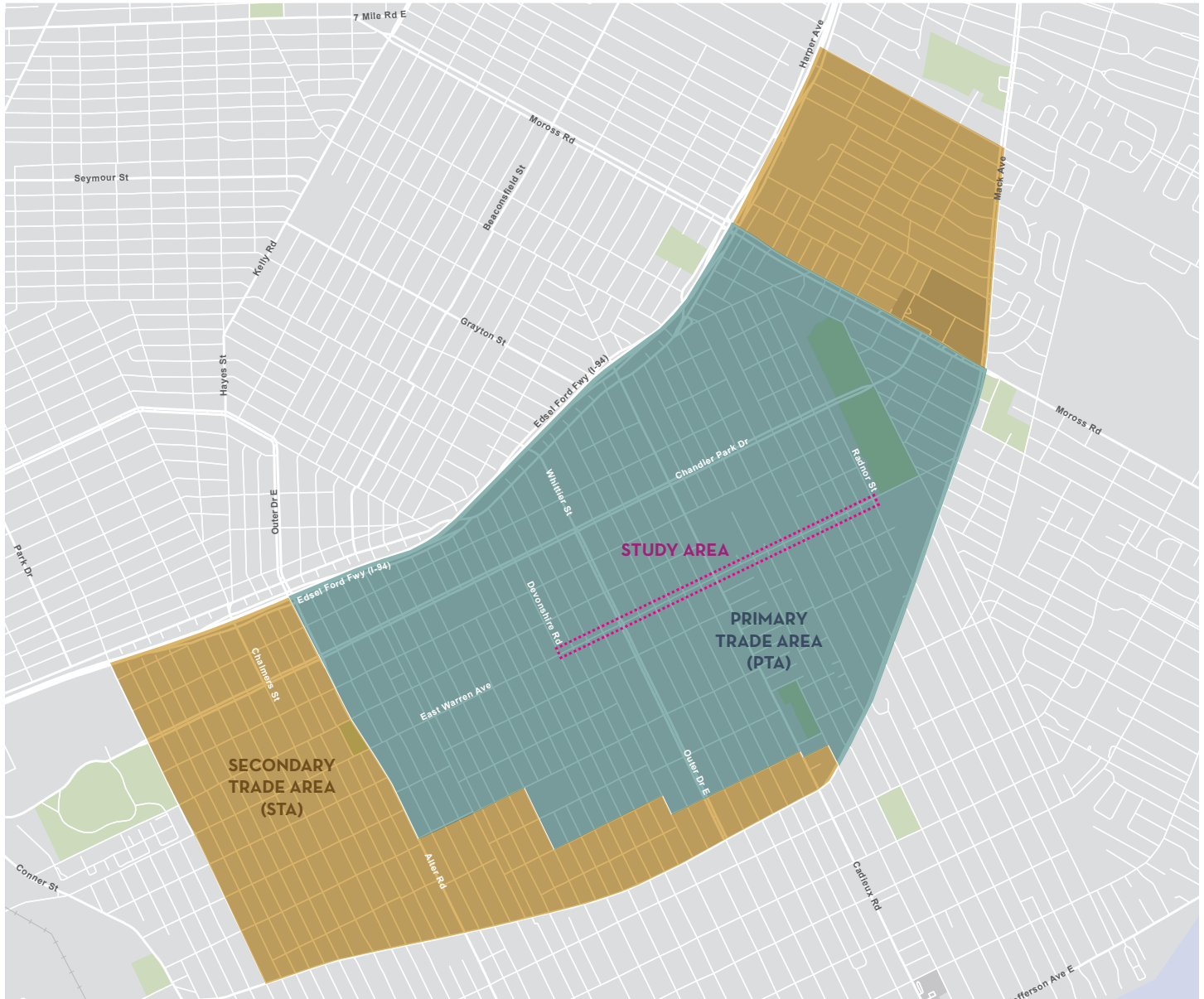


Class of Space Distribution



TRADE AREA ANALYSIS

The east-west orientation of East Warren Avenue creates a retail environment where customers will more likely travel from east or west of the corridor than from the north or south. Additionally, three- and five-minute drive times were used to delineate the Primary and Secondary Trade Areas because the retail along this corridor primarily services local residents. Trade areas were further limited to the south by competing retail located along and below Mack Avenue and to the north by I-94.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	20,325 (14% decrease, 2010 to 2017)	11,741	658,250
Households	8,435	5,618	252,089
Median Age	33	35	35
Median Household Income	\$34,188	\$39,119	\$27,372
Primary Nonwhite Ethnic Group	83% (African-American)	71% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	26%	31%	20%
Single Parent Family Households	34%	29%	31%
Average Number of Vehicles per Household	1.4	1.3	1.2
Households Without Access to Personal Vehicle	18%	18%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

Retail in the commercial corridor can benefit from the corridor’s high traffic counts as well as the strength of the neighboring communities. Moving forward, connecting the dots between the community’s retail needs and its existing inventory will allow for a more effective and sustainable retail mix.

East Warren’s is highly underserved in Neighborhood Goods & Services retail, and there is particularly low access to personal care and household goods and services, such as pharmacies. The neighborhoods that have direct access to this commercial corridor lack the ability to access everyday goods as well as groceries, despite the fact that sales in this study area would support additional retailers. This corridor is primed for increasing the amount of and quality of neighborhood-serving retail.

- Neighborhood Goods & Services (NG&S):

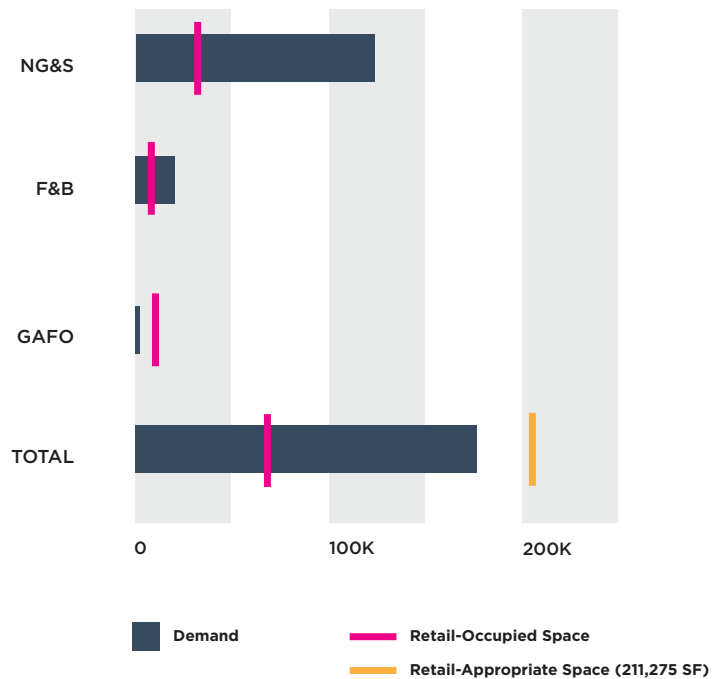
The demand for neighborhood-serving retail is concentrated in two categories: grocery and pharmacy. Successful tenants will fit the price range of the nearby population, be clustered near similar retail, accessible, and market appropriate.

- Food & Beverage (F&B):

For F&B tenants generating higher-than-average sales per square foot, the market is already saturated. The neighborhood can continue to attract smaller, locally-owned restaurants, as there is still demand for quick-service or takeout restaurants. A short term strategy (1-3 years) should include supporting existing restaurant owners already serving the neighborhood, and encouraging the tenanting of additional F&B tenants not already represented.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

Currently, the East Warren commercial corridor is oversupplied in GAFO retail, even with the upcoming closure of Hammertime Hardware. Retail development strategies in the short term should focus on the other two retail categories.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	144,598	38,010
F&B	28,027	15,510
GAFO	7,940	17,280
TOTAL	180,565	70,800




VACANCY RATE 45.1%

Supply and demand figures are modified to adjust for market conditions specific to East Warren. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

SUPPORTING EXISTING BUSINESSES WILL BE CRITICAL IN INCREASING ACCESS TO RETAIL IN THIS CORRIDOR.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$17,857,034	62,958
 Alcohol at Home	\$891,999	2,494
 Personal/Household Care Goods and Services	\$26,619,964	76,345
 Pet Food & Services	\$618,330	2,801
NG&S SUBTOTAL	\$45,987,327	144,598
 Full-Service	\$5,045,354	14,459
 Fast Food	\$4,958,183	12,234
 Alcohol Away from Home	\$311,977	612
 Snacks & Non-Alcoholic Beverages	\$265,483	722
F&B SUBTOTAL	\$10,580,996	28,027
 Home Furnishings	\$422,254	2,193
 Apparel	\$733,538	3,207
 Electronics	\$329,067	411
 Sports Equipment	\$157,160	811
 Books, Music & Other	\$151,577	966
 Pet Supplies	\$29,978	157
 Automotive Equipment	\$35,025	195
GAFO SUBTOTAL	\$1,858,600	7,940
TOTAL GENERATED RETAIL DEMAND:	\$58,426,923	180,565

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

EAST WARREN

Supporting existing retailers is a critical part of an effort to increase access to retail in this study area. Conversations with stakeholders revealed that when retailers do open, it is difficult to stay in business due to a lack of clustering and a lower level of sales per square foot, creating challenges in maintaining properties. **Several overarching conclusions and recommendations, applicable to all corridor studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Organize retailers into a Micro-BID, a business association or as a subcommittee of one of the adjacent neighborhood associations. This will provide the opportunity for retailers to coordinate efforts and resources, and will give the neighborhood to have a platform to share their desires on issues such as hours of operation, quality of offering, etc.	1
PLANNING	Identify the Retail Priority Blocks at a well-trafficked but neighborhood-accessible intersection within the study area. The size of this area should be proportioned to match the surrounding community's retail demand, as identified in this report.	1
	Provide resources to restore historic architecture (such as the Alger Theatre) to contribute to a vibrant retail environment.	2
SMALL BUSINESS	N/A	N/A
PROPERTY OWNERS	N/A	N/A
MARKETING	N/A	N/A
SAFETY	N/A	N/A

ISLANDVIEW-GREATER VILLAGES

CORRIDOR HISTORY

The Islandview-Greater Villages study area has a larger geographic context than other neighborhoods in this report. It conglomerates all or parts of Indian Village, West Village, the Joseph Berry Subdivision, Islandview, East Village, and the Gold Coast.

The study area includes commuter corridor appropriate retailers such as neighborhood and strip centers, in addition to smaller-format businesses located along Agnes and Van Dyke Streets. These smaller businesses include a handful of Food & Beverage establishments enabled, primarily, by the purchasing power of the surrounding neighborhoods. Continuing to grow and develop this retail will require a better understanding of what residents can support.

CORRIDOR BOUNDARY RATIONALE

An alternative approach is needed for this neighborhood to ensure the output can work in concert with the ongoing planning project (concurrent study). For this neighborhood, in lieu of selecting and only studying a single corridor, the neighborhoods of Islandview and the Greater Villages (bound by Mack Avenue, Mt. Elliott Street, Jefferson Avenue, and St. Jean Street) were studied. The total supportable retail square footage for the neighborhood is used to determine appropriate nodes and corridor of retail activity with input from the community, the City of Detroit and consultant team engagement.

CONCURRENT STUDIES

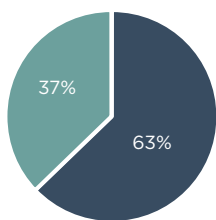
In 2017, The Detroit Planning selected a team of consultants and conducted a neighborhood planning study for Islandview and the Greater Villages; a study area bounded by Mt. Elliot St. (West), Mack Ave. (North), St. Jean St. (East, and the Detroit River (South).

The City held a robust community engagement process to create a neighborhood strategy and implementation plan for Detroit's lower east side. The scope of work included the following categories: Landscape Design and Green Stormwater Infrastructure, Streetscape and Neighborhood Connectivity, Development: Economic, Housing, and Historic Preservation, and Zoning Assessments. The resulting plan will include strategic development recommendations with the cardinal purpose of improving quality of life and strengthening the neighborhood's social and economic vibrancy. Near-term development recommendations are anticipated to be announced at the end of February 2018.

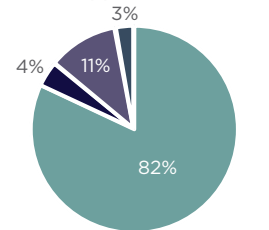
EXISTING RETAIL SUPPLY

The study area corridor contains 455,400 square feet of retail-appropriate space. The retail mix contains both national retailers (including Walgreens, Metro PCS, and Wendy's) as well as local businesses. Convenience stores, carry-outs, and drive-thru restaurants are found throughout this neighborhood. West Villages is also known for its successful collection of restaurants on Agnes Street that attract customers from both within the community and from neighboring communities, such as Grosse Pointe Park.

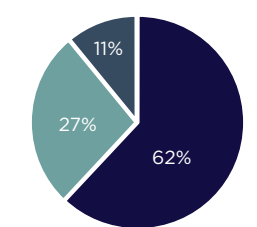
Occupancy Rate



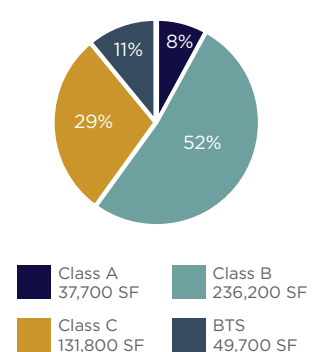
Tenant Type Distribution



Retail Type Distribution

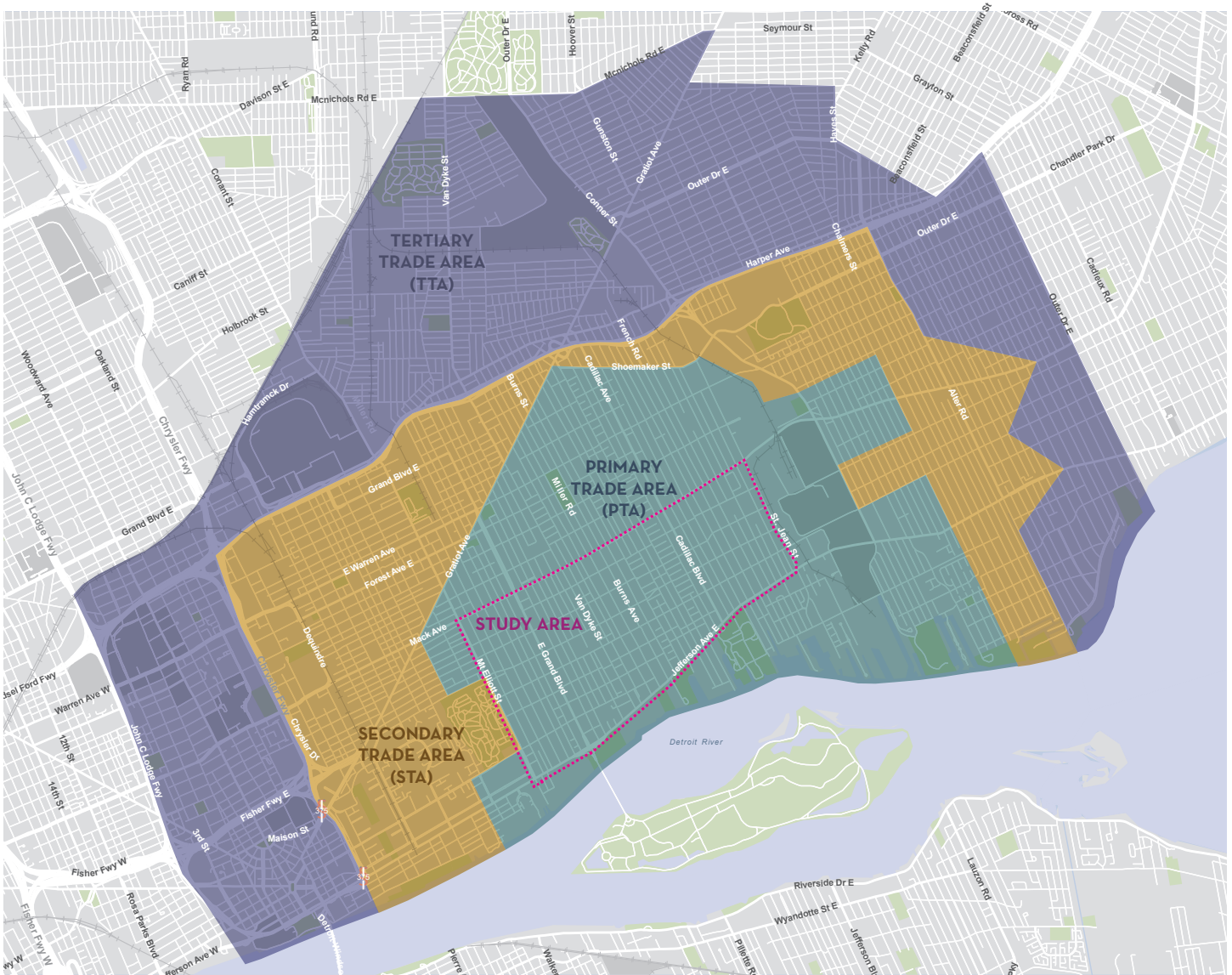


Class of Space Distribution



TRADE AREA ANALYSIS

For the Islandview-The Greater Villages study area, nearby competition and the layout of the surrounding roads were primary factors when determining the trade area boundaries. The road network, physical barriers (the Detroit River, Conner Creek Industrial, and the railroad tracks), and the location of grocers and other Neighborhood Goods & Service retailers had the greatest impact on the Primary Trade Area boundaries. The Secondary Trade Area and Tertiary Trade Area boundaries were determined through an assessment of drive times, major roads that serve as psychological barriers for potential customers, industrial uses as physical barriers, and dead-end roads that limit connectivity between the commercial corridor and potential customers.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	35,093 (4% decrease, 2010-2017)	35,943	61,318	658,250
Households	17,419	15,300	29,589	252,089
Median Age	43	39	35	35
Median Household Income	\$22,843	\$28,123	\$25,126	\$27,372
Primary Nonwhite Ethnic Group	89% (African-American)	79% (African-American)	71% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	21%	30%	28%	20%
Single Parent Family Households	30%	34%	30%	31%
Average Number of Vehicles per Household	0.9	1	1.1	1.2
Households Without Access to Personal Vehicle	37%	30%	30%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

The Islandview-The Greater Villages study area, like many of the Detroit study areas, is underserved by NG&S retail. Currently, convenience stores define the neighborhood-serving retail category. Convenience stores do not provide the same level of retail service that a full-service grocery store or pharmacy provides. To maintain the momentum of retail development, encouraging the integration of these necessary retailers that serve the daily and weekly needs of residents will be critical to developing a well-rounded, sustainable retail district.

- Neighborhood Goods & Services (NG&S):

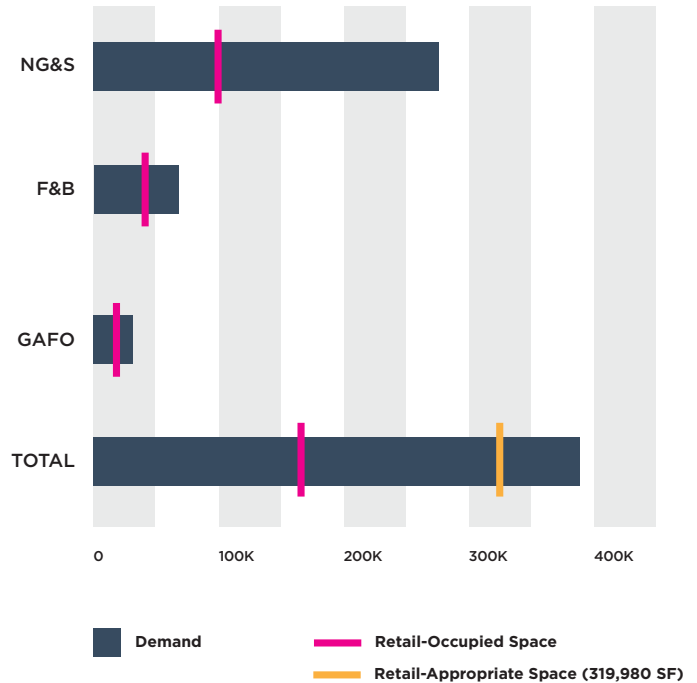
The demand for NG&S retailers should be fulfilled with primarily locally owned businesses catering towards the retail needs of the community. Goods such as affordable fresh foods, personal care products, and other home care items are in demand within this study area. Increasing the level of retail serving these needs within this study area will increase its livability and attractiveness to potential residents. New retail that comes into the commercial corridor should be clustered when possible to allow customers to accomplish multiple errands with one trip.

- Food & Beverage (F&B):

This study area is already well-served for higher-end F&B options. That being said, this area has an opportunity attract affordable sit-down restaurants that cater to families and visiting populations (particularly churchgoers). Not only are many Detroit neighborhoods underserved in retail, but they often lack gathering spaces. Retailers that provide the community a place to gather should be encouraged and supported, particularly through helping to bridge any awareness gap between the retailer and the community.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

This study area can support approximately 8,000 additional square feet of apparel retail.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	277,063	100,911
F&B	69,818	42,660
GAFO	34,528	19,794
TOTAL	381,409	163,365






VACANCY RATE 37.2%

Supply and demand figures are modified to adjust for market conditions specific to Islandview-The Greater Villages. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

A NEIGHBORHOOD-SERVING RETAIL CLUSTER CAN BE CREATED BY BUILDING UPON ACTIVITY ALONG KERCHEVAL AVENUE.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$30,996,213	126,359
 Alcohol at Home	\$1,489,316	4,352
 Personal/Household Care Goods and Services	\$42,052,910	141,237
 Pet Food & Services	\$1,035,512	5,116
NG&S SUBTOTAL	\$75,573,950	277,063
 Full-Service	\$12,221,157	35,023
 Fast Food	\$12,428,011	30,666
 Alcohol Away from Home	\$1,195,778	2,346
 Snacks & Non-Alcoholic Beverages	\$655,371	1,783
F&B SUBTOTAL	\$26,500,317	69,818
 Home Furnishings	\$1,799,367	8,718
 Apparel	\$4,508,932	17,856
 Electronics	\$847,774	1,031
 Sports Equipment	\$411,652	1,991
 Books, Music & Other	\$484,190	2,810
 Pet Supplies	\$217,927	1,077
 Automotive Equipment	\$196,881	1,046
GAFO SUBTOTAL	\$8,466,722	34,528
TOTAL GENERATED RETAIL DEMAND:	\$110,540,989	381,409

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

ISLANDVIEW-THE GREATER VILLAGES

There are several overarching conclusions and recommendations, applicable to all corridors studies, and are located in the last chapter of this report (pages 114-119).

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Organize retailers into a Micro-BID, a business association or as a subcommittee of one of the adjacent neighborhood associations. This will provide the opportunity for retailers to coordinate efforts and resources, and will give the neighborhood to have a platform to share their desires on issues such as hours of operation, quality of offering, etc.	1
PLANNING	Bolster neighborhood-serving retail along Kercheval Avenue with additional clustered, double-sided infill retail development by identifying Retail Priority Blocks and targeting investment opportunities there. This development should prioritize the pedestrian experiences by requiring minimal parking and setbacks.	1
	Direct automobile-centric retail development to Jefferson Avenue. Aligning with the existing development typology that caters to the commuter corridor, large-format, big box stores which require parking as a component of their prototype are ideal for Jefferson. This characteristic is typically true for national retailers that use traffic counts as a metric for site selection.	2
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for existing stores along Jefferson Avenue to determine ways to better meet the needs of the neighborhoods. A Grocery Enhancement Audit assesses 4 categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability - parking, access, loading and delivery systems, mechanical, electrical, and plumbing (MEP) loads, etc.	2
PROPERTY OWNERS	N/A	N/A
MARKETING	Conduct a campaign that presents the Islandview and Greater Villages neighborhoods as a single retail destination with both neighborhood centric and destination retailers.	3
SAFETY	N/A	N/A

JEFFERSON-CHALMERS

CORRIDOR HISTORY

Jefferson-Chalmers' retail corridor contains buildings that date back to the 1920s. The Jefferson-Chalmers area is built on top of what used to be marshland. Its canals and proximity to the Detroit River is a prime component of the neighborhood's character. Initially developed into a race track, Jefferson-Chalmers grew into a residential neighborhood for blue collar workers. Today East Jefferson Avenue is still a high-volume commuter thoroughfare between the suburbs and downtown Detroit. The buildings that line East Jefferson Avenue are some of the most pristine examples of contiguous inline retail structures that date back to the initial development of the neighborhood in the early 20th century. Designated as a historic area by the National Trust for Historic Preservation in 2016, the retail in the Jefferson-Chalmers study area has an opportunity to serve as a living time capsule for Detroit retail.

The retail along this corridor is diverse, ranging from suburban strip malls to historic urban storefronts, which in a way represents the history of Detroit itself—a city that has transformed from an urban industrial hub into a suburban city.

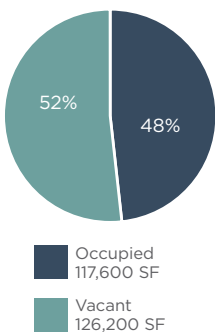
CORRIDOR BOUNDARY RATIONALE

Retail along Jefferson Avenue from Conner Street to Alter Road was identified as the commercial corridor between Conner Creek Industrial Park and Alter Road—the jurisdictional boundary between Grosse Pointe Park and the City of Detroit.

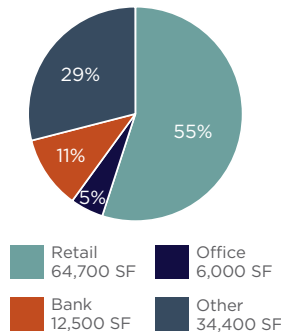
EXISTING RETAIL SUPPLY

Jefferson-Chalmers' retail corridor lines East Jefferson Avenue. Retail typologies along the Jefferson-Chalmers retail corridor include a mix of mixed-use buildings that contain retail with no setback from the street to grocery-anchored strip centers with dedicated parking lots. The total retail inventory includes 243,800 square feet of retail-occupied space. The average size of a tenant within this commercial corridor is 2,414 square feet.

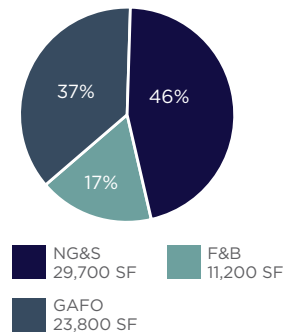
Occupancy Rate



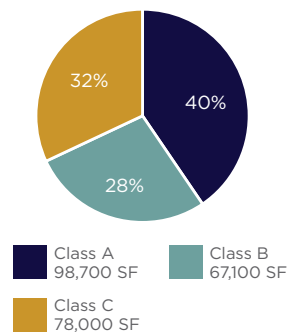
Tenant Type Distribution



Retail Type Distribution

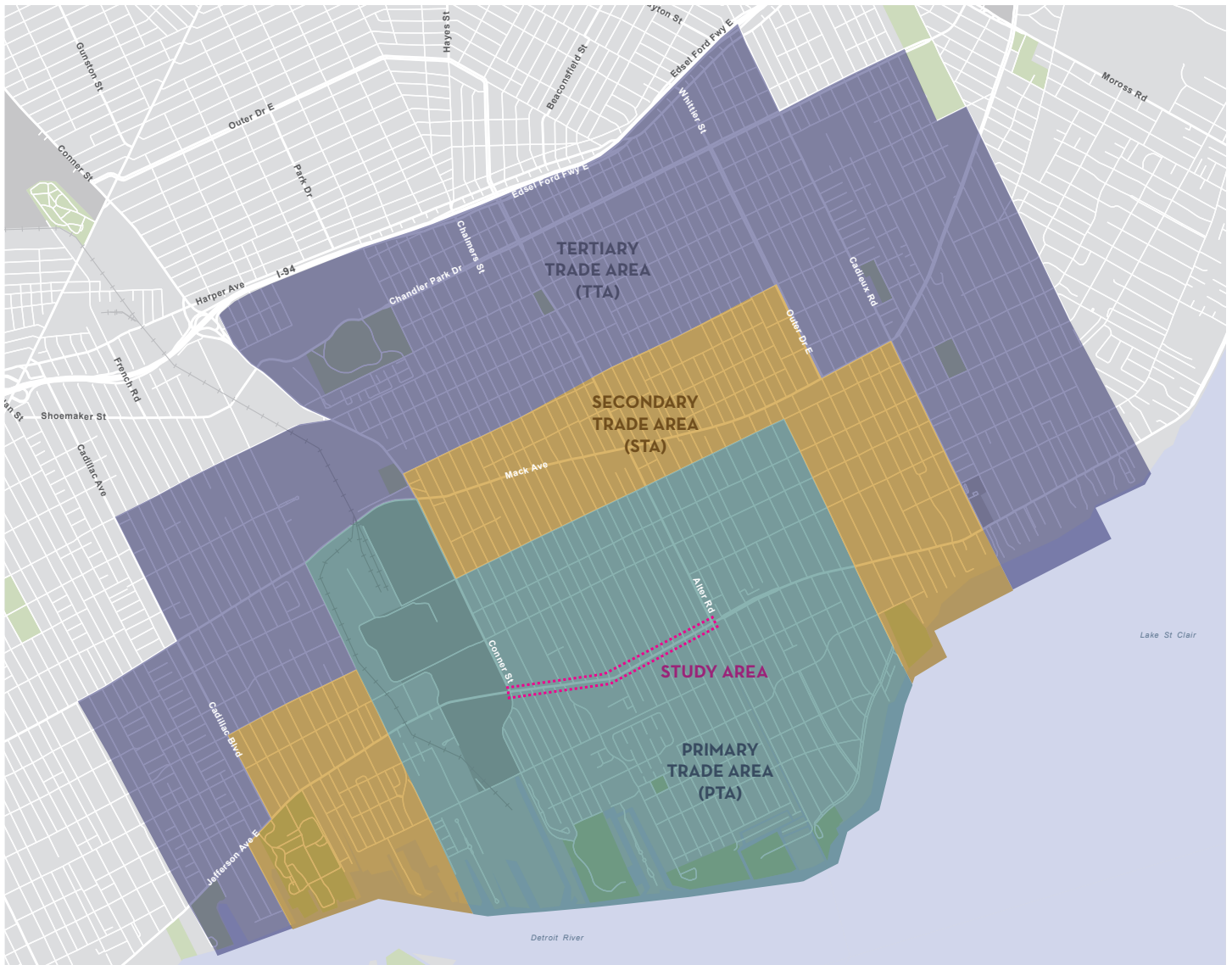


Class of Space Distribution



TRADE AREA ANALYSIS

Commuter demand contributes to a tertiary level of demand, but the boundaries of the Tertiary Trade Area (TTA) are limited by high-quality competing retail in the adjacent town of Grosse Pointe. The adjacent industrial park serves as both a contributor to demand (as workers seek an off-campus lunch opportunity) and a physical and psychological boundary to potential customers residing west of the facility. Additionally, Mack Avenue is a secondary retail corridor for the neighborhood and competes directly with Jefferson Avenue, thus limiting the boundaries of the Primary Trade Area to the north.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	15,303 (14% decrease, 2010-2017)	11,509	35,699	658,250
Households	7,542	4,219	14,344	252,089
Median Age	40	37	36	35
Median Household Income	\$43,990	\$49,181	\$33,826	\$27,372
Primary Nonwhite Ethnic Group	54% (African-American)	57% (African-American)	72% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	43%	42%	32%	20%
Single Parent Family Households	23%	21%	30%	31%
Average Number of Vehicles per Household	1.4	1.5	1.3	1.2
Households Without Access to Personal Vehicle	19%	17%	22%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

Jefferson-Chalmers is significantly underserved in the Neighborhood Goods & Services retail category. However, the other two retail categories are less straightforward. In the Food & Beverage retail category, the amount of supportable square feet in this study area depends on the type of tenant. Conversations with stakeholders revealed that residents desire a place to affordably bring a family for dinner or spend time together after church.

In general, retail along this corridor struggles to succeed in part due to a lack of clustering, challenges associated with vacancy due to too much retail space (commercial space in the study area is 52% vacant), and low levels of safety and access for customers traveling by foot or bike. The high level of demand for NG&S retail over F&B or GAFO indicates that this commercial corridor is best suited towards serving local neighborhoods.

- Neighborhood Goods & Services (NG&S):

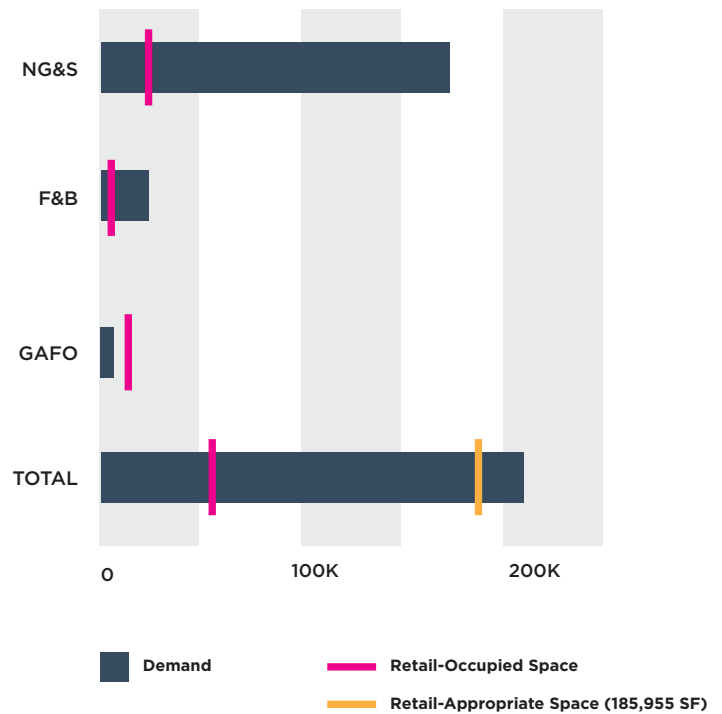
The NG&S retail market in this study area is currently dominated by beauty and nail salons. While an important service, there are other retail needs that are unfulfilled in this neighborhood, particularly grocery and pharmacy.

- Food & Beverage (F&B):

There is unmet demand for locally owned, affordable F&B retail. The large number of take-out restaurants in the commercial corridor suggests that the neighborhood can support one or two low- to mid-range sit-down restaurants. A high-end restaurant, however, will be much less likely to succeed in this market due to the existing saturation of F&B retail.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

There is currently no additional demand for GAFO retail in this study area as the existing demand is already fulfilled by existing retail within the corridor (including Red Bag Boutique, GameStop, and Villa Shoe Store).



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	175,050	25,890
F&B	25,297	9,570
GAFO	12,591	20,490
TOTAL	212,938	55,950
















VACANCY RATE 51.8%

Supply and demand figures are modified to adjust for market conditions specific to Jefferson-Chalmers. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

A HIGH-QUALITY BUILDING STOCK, VIBRANT RETAIL ACTIVITY, AND GREAT VISIBILITY CAN BE USED TO MAKE A GOOD CORRIDOR BETTER.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$18,169,500	74,070
 Alcohol at Home	\$1,083,908	3,167
 Personal/Household Care Goods and Services	\$28,123,138	94,453
 Pet Food & Services	\$680,197	3,360
NG&S SUBTOTAL	\$48,056,743	175,050
 Full-Service	\$4,456,479	12,771
 Fast Food	\$4,257,055	10,504
 Alcohol Away from Home	\$493,462	968
 Snacks & Non-Alcoholic Beverages	\$387,273	1,054
F&B SUBTOTAL	\$9,594,270	25,297
 Home Furnishings	\$638,782	3,243
 Apparel	\$1,382,897	5,856
 Electronics	\$467,847	579
 Sports Equipment	\$203,746	1,029
 Books, Music & Other	\$226,294	1,399
 Pet Supplies	\$46,926	241
 Automotive Equipment	\$44,349	243
GAFO SUBTOTAL	\$3,010,841	12,591
TOTAL GENERATED RETAIL DEMAND:	\$60,661,854	212,938

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

JEFFERSON-CHALMERS

Moving forward, developing a retail cluster that is highly accessible and safe for residents and visiting populations (such as churchgoers) will sustain retail in this study area. **Several overarching conclusions and recommendations, applicable to all corridor studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Create a business improvement district, a principal shopping district, or a main street program. Integrating a coordinated effort for this business district into a comprehensive citywide initiative should be a priority. An additional option is to join the Micro-BID strategy presented in the citywide recommendations.	1
	Pursue a retail merchandising strategy that focuses on Neighborhood Goods & Services and Food & Beverage. In support of this recommendation, the following steps should be undertaken: (1) existing neighborhood service tenants should be identified and supported in their efforts to pursue building improvements through the Motor City Re-Store program; (2) concentrate service-based businesses to the eastern and western ends of the district and cluster additional restaurant opportunities closer to the new dining additions joining the district at the intersection of Jefferson Avenue and Chalmers Street.	2
PLANNING	Explore the feasibility of a big box store location at the periphery of the corridor. A big box store would benefit from the high traffic counts and should be required to have a flexible design to suit various tenant types and sizes over time.	2
SMALL BUSINESS	N/A	N/A
PROPERTY OWNERS	N/A	N/A
MARKETING	N/A	N/A
SAFETY	N/A	N/A

JOY-SOUTHFIELD

CORRIDOR HISTORY

The Joy-Southfield study area, within the neighborhood commonly known as Cody Rouge, is known for its innovative development strategies and a strong sense of community. Home to the Joy-Southfield Development Corporation, residents have come together to develop a unified direction for the future development of the neighborhood. There is investment in the neighborhood in the form of a multifamily housing development and a bioswale infill, which protects against flooding and prevents overwhelming the area's aging sewer system. Joy Road is an important commercial thoroughfare within this evolving neighborhood.

The retail along Joy Road was built in the typical strip center style seen throughout the suburbs of Detroit. Positioned between several neighborhoods, including Franklin Park and Warrendale, Joy Road is well situated to grow into a neighborhood-serving retail cluster.

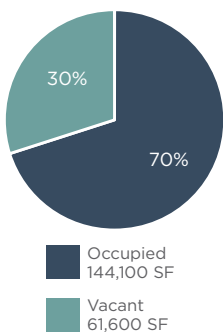
CORRIDOR BOUNDARY RATIONALE

The commercial corridor for Joy-Southfield is based upon physical and psychological barriers of Rouge Park to the west and the rail tracks to the east. The study area is defined along Joy Road between Trinity Street and Ashbury Park.

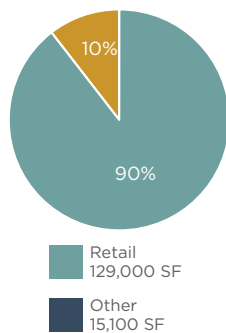
EXISTING RETAIL SUPPLY

The Joy-Southfield commercial corridor contains a mix of retail and automobile service centers, multifamily residential buildings, and office space. The retail-occupied space along the corridor is primarily pad and strip center retail sites with adjacent parking lots. Tenants along this corridor include Saturn Super Foods, Dollar General, and Exclusive Ribs & Souffood. There is 205,700 square feet of retail-appropriate space in this commercial corridor.

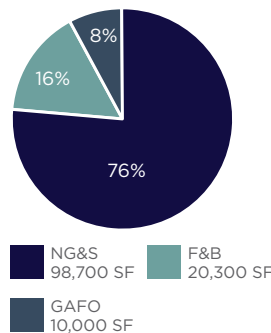
Occupancy Rate



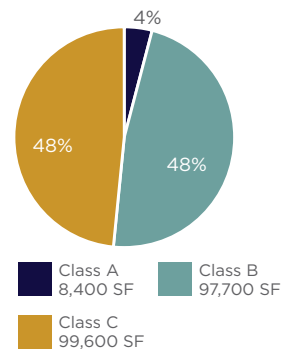
Tenant Type Distribution



Retail Type Distribution

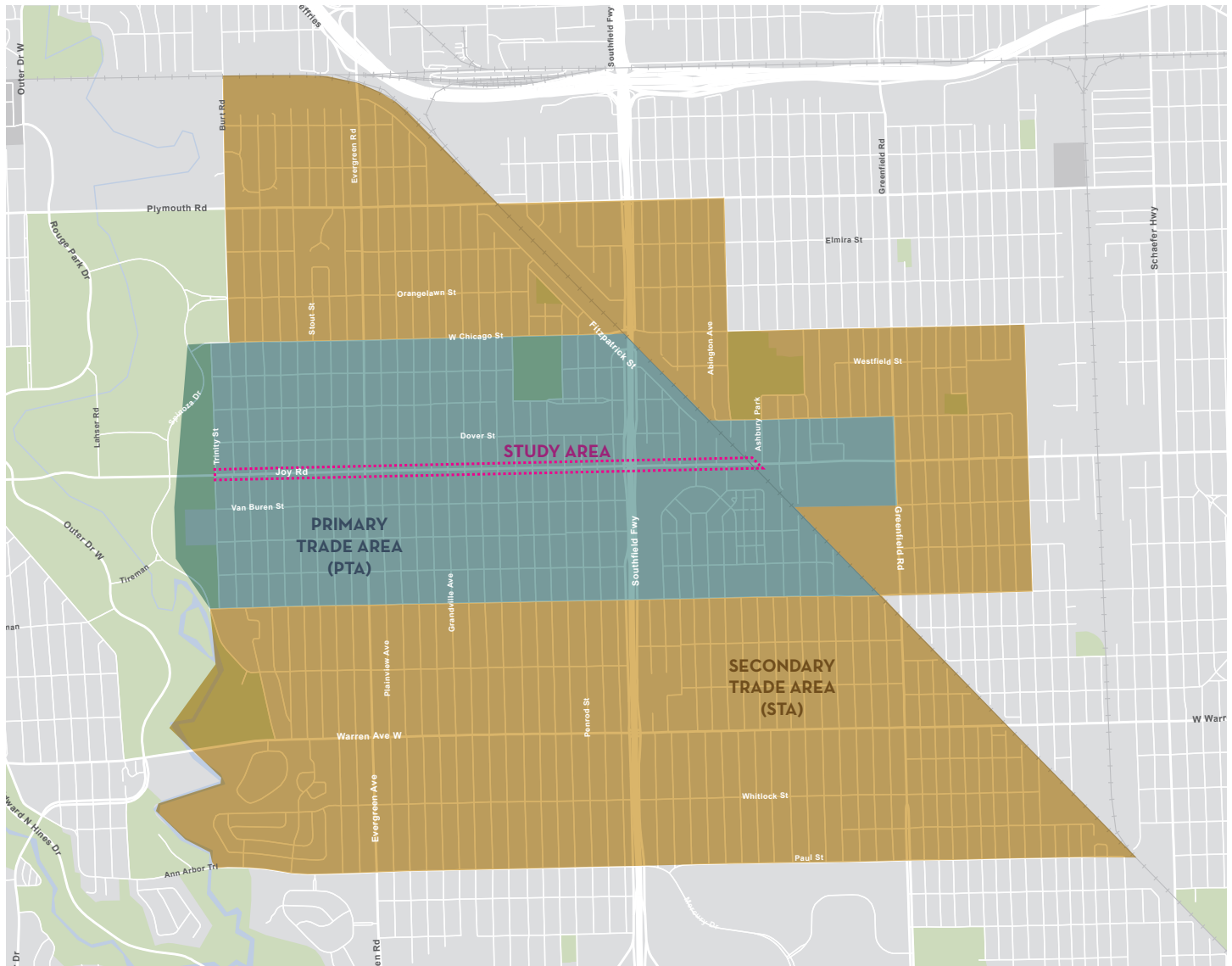


Class of Space Distribution



TRADE AREA ANALYSIS

The trade areas for the Joy-Southfield study area mirror the east-west orientation of Joy Road, as retail along Plymouth Road and Warren Avenue to the north and south directly compete for sales with retail along Joy Road. The railway is a major psychological and physical barrier for both the Primary and Secondary Trade Areas to the east because it not only disconnects the road network but also impacts the way customers move through the neighborhood. River Rouge Park is a major geographic barrier to sales to the west.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	12,172 (4% decrease, 2010-2017)	36,913	658,250
Households	5,583	14,481	252,089
Median Age	32	31	35
Median Household Income	\$26,591	\$24,329	\$27,372
Primary Nonwhite Ethnic Group	90% (African-American)	62% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	16%	16%	20%
Single Parent Family Households	41%	32%	31%
Average Number of Vehicles per Household	1.2	1.3	1.2
Households Without Access to Personal Vehicle	20%	17%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

The Joy-Southfield study approaches market equilibrium based on the current tenant mix. The greatest opportunity for bringing in additional retail is for NG&S retailers, such as local or regional grocery. Alternatively, an opportunity exists to support and assist existing retailers with expanding their product lines. Conversations with stakeholders unveiled the need for access to a greater variety of fresh foods in their neighborhood, a sentiment also reflected in the demand findings.

The retail within this corridor suffers due to the poor physical condition of existing spaces and a lack of clustering between existing retailers. To truly improve retail access, a sharp focus should be paid to bolstering existing businesses and fixing problems with parking lanes, lack of crosswalks, clustering retail, and overall increasing overall retail accessibility for residents.

- Neighborhood Goods & Services (NG&S):

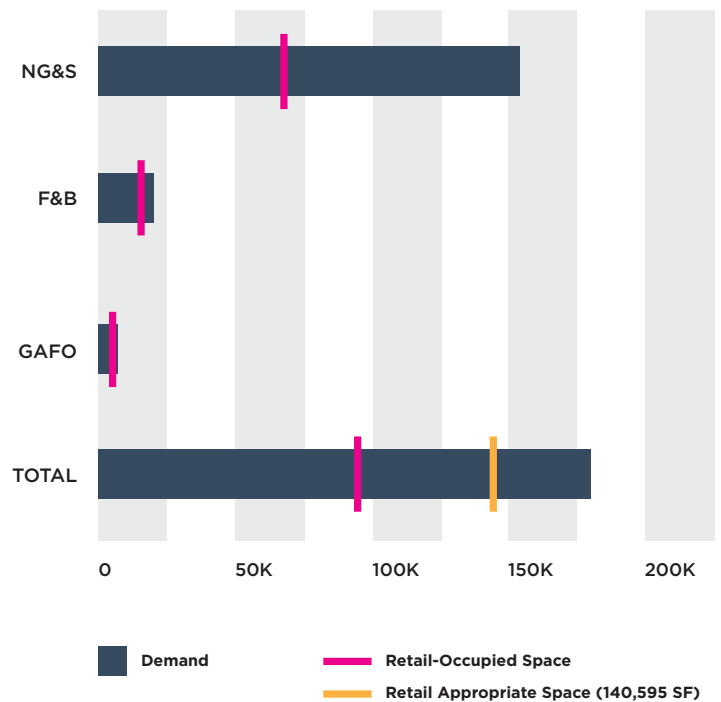
A grocer tenant is recommended for the corridor to fulfill the Food at Home and Personal/Household Care Goods and Services demand generated by the surrounding residents. Additionally, to continue serving the surrounding residents, work with other local retailers by increasing SKUs and assisting in, property renovation, signage improvements, and other upgrades will increase access to NG&S retail needs (fresh foods and personal care products) without the need to recruit new retailers into a fairly stable market.

- Food & Beverage (F&B):

There are currently several fast food and sit-down restaurant options within the commercial corridor that serve the existing demand for F&B. Opportunities for further development include working with these retailers to invest in their businesses, consider relocation to increase clustering, and connecting existing businesses to the community by directly marketing existing businesses to local residents.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

There is currently no demand for additional GAFO retail at this time.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	153,431	67,260
F&B	18,924	14,700
GAFO	9,098	7,260
TOTAL	181,453	89,220

VACANCY RATE 30%

Supply and demand figures are modified to adjust for market conditions specific to Joy-Southfield. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

CREATE A COMMUNITY HUB FOR THIS FAMILY-ORIENTED NEIGHBORHOOD BY UPDATING THE RETAIL MIX.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$18,868,121	76,918
 Alcohol at Home	\$782,968	2,288
 Personal/Household Care Goods and Services	\$21,355,340	71,723
 Pet Food & Services	\$506,512	2,502
NG&S SUBTOTAL	\$41,512,941	153,431
 Full-Service	\$2,770,082	7,938
 Fast Food	\$3,764,917	9,290
 Alcohol Away from Home	\$389,555	764
 Snacks & Non-Alcoholic Beverages	\$342,536	932
F&B SUBTOTAL	\$7,267,089	18,924
 Home Furnishings	\$561,283	2,850
 Apparel	\$989,851	4,191
 Electronics	\$368,122	456
 Sports Equipment	\$118,596	599
 Books, Music & Other	\$92,134	570
 Pet Supplies	\$38,436	198
 Automotive Equipment	\$42,862	235
GAFO SUBTOTAL	\$2,211,283	9,098
TOTAL GENERATED RETAIL DEMAND:	\$50,991,313	181,453

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

JOY-SOUTHFIELD

The commercial corridor along Joy Road is sprawling and highly auto-centric, but it serves a population that faces major accessibility issues. Therefore, it is important that improvements to this commercial corridor bridge the accessibility gap between retailers and the local population. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Organize retailers into a Micro-BID, a business association or as a main street organization. This will provide an opportunity for retailers to coordinate efforts and resources, as well as provide the neighborhood with a platform to share their input on issues such as hours of operation, quality of offering, etc.	1
	Create a retail merchandising strategy that prioritizes securing Neighborhood Goods & Services (NG&S) tenants. Joy-Southfield's family-oriented community can benefit from tenants within this category, specifically ones that cater towards children.	2
PLANNING	Fix the lane striping issues created when the roadway was painted for two wide lanes in each direction, rather than two travel lanes and parallel parking on each side of Joy Road – this condition is critically damaging to retailers fronting this commercial corridor. Additionally, traffic lanes should be narrowed when Joy Road is restriped, as the wider travel lanes are facilitating vehicular travel at excessive speeds.	1
	Ensure that trees planted during the sidewalk improvement program are as mature as can be afforded. Additionally, assign accountability for the care of the trees to a neighborhood or civic organization or youth program. As tree canopies in front of retail establishments expand, ensure that trees are regularly trimmed to maintain clear sightlines between vehicles and retail storefronts.	2
	Identify more than one Retail Priority Block cluster in the commercial corridor. Due to the length of the route, spacing retail clusters around more than one node would permit the surrounding neighborhoods to have more walkable, accessible retail to homes or places of business.	2
SMALL BUSINESS	N/A	N/A
PROPERTY OWNERS	N/A	N/A
MARKETING	N/A	N/A
SAFETY	N/A	N/A

LIVERNOIS-6 MILE

CORRIDOR HISTORY

Livernois-6 Mile has its roots as an agrarian neighborhood, but the area was transformed after the University of Detroit moved northwest from Downtown. The development of the neighborhood facilitated the growth of the Avenue of Fashion, which previously contained a Kresge, B. Siegel, and Kroger. The neighborhood retail thrived on foot traffic, which dwindled when shopping malls grew in popularity beginning in the 1960s.

The Avenue of Fashion has gathered more attention and investment over the last decade, and has retained its ability to draw customers from throughout the City. Businesses such as Simply Casual, Lucki's Cheesecakes, and Art in Motion represent the resurgence of a destination retail node within this study area.

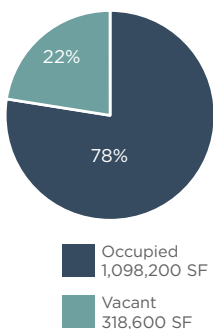
CORRIDOR BOUNDARY RATIONALE

The boundaries for the Livernois-6 Mile commercial corridor are defined as along Livernois Avenue between Grove Street and Pembroke Avenue and West McNichols Street from Cherrylawn Street to Detroit Golf (or Fairway Drive). Although retail exists past these boundaries, the commercial corridor represents a contiguous retail environment present near the intersection of Livernois and McNichols.

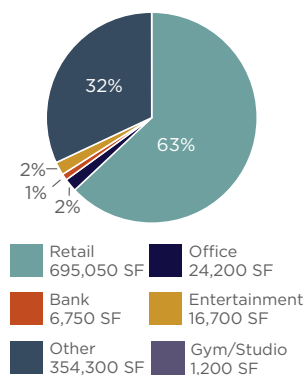
EXISTING RETAIL SUPPLY

The Livernois-6 Mile commercial corridor contains 1,416,800 square feet of retail-appropriate space. The retail supply contains a large amount of hardware and home goods stores. Large stores of this type, such as the Maiden House Ministries Resale Outlet and the AAA True Value Hardware store, are a rarity in other commercial corridors. This corridor also contains the retail strip known as the Avenue of Fashion, a collection of art and clothing shops and restaurants. This area contains highly contiguous and good quality retail space, which has allowed this retail cluster to continue to attract customers from across Detroit, as it did decades ago. At the same time, the strong NG&S retail supply indicates that this corridor also caters towards the local population.

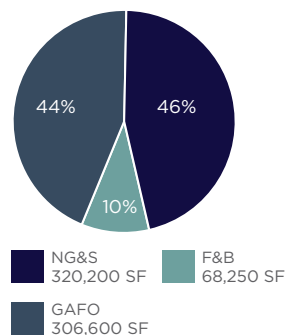
Occupancy Rate



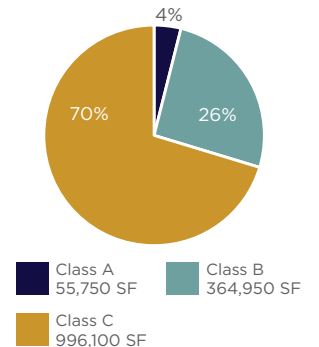
Tenant Type Distribution



Retail Type Distribution

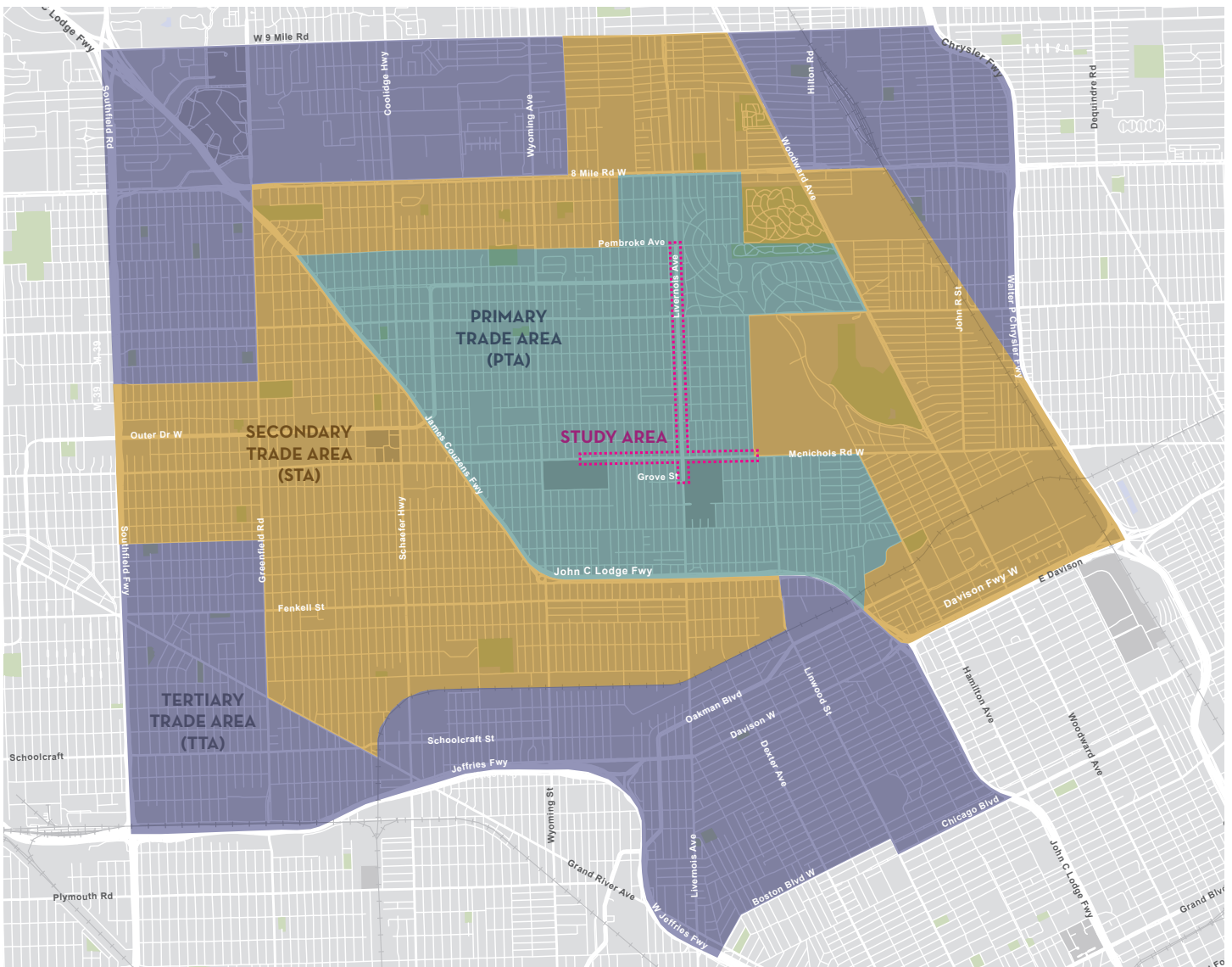


Class of Space Distribution



TRADE AREA ANALYSIS

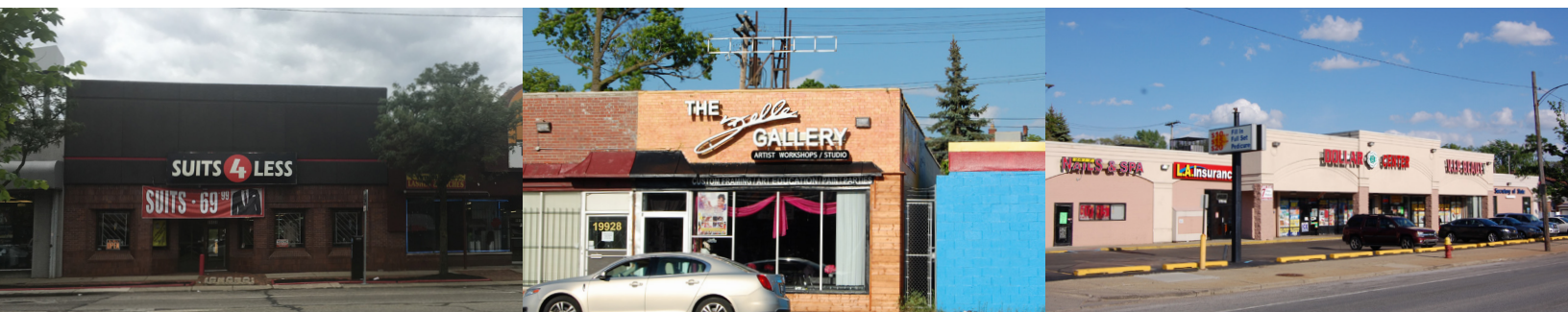
For the Livernois-6 Mile study area, nearby competition and the layout of the surrounding roads were primary factors when determining the trade area boundaries. The road network, physical barriers (the Woodlawn Cemetery, the Detroit Golf Club, and the John C. Lodge Freeway), and the location of grocers and other Neighborhood Goods & Service retailers had the greatest impact on the Primary Trade Area boundaries, while the Secondary Trade Area and Tertiary Trade Area boundaries were determined through an assessment of drive times, major roads that serve as psychological barriers for potential customers, industrial uses as physical barriers, and dead-end roads that limit connectivity between the commercial corridor and potential customers.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	46,639 (4% decrease, 2010-2017)	68,393	74,570	658,250
Households	19,515	27,657	31,629	252,089
Median Age	40	38	39	35
Median Household Income	\$36,365	\$29,562	\$30,890	\$27,372
Primary Nonwhite Ethnic Group	92% (African-American)	86% (African-American)	83% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	32%	22%	22%	20%
Single Parent Family Households	24%	29%	30%	31%
Average Number of Vehicles per Household	1.3	1.2	1.2	1.2
Households Without Access to Personal Vehicle	16%	24%	22%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA)



MARKET ANALYSIS CONCLUSIONS

This corridor benefits from a wide customer base, attracting customers from throughout Detroit. However, although the GAFO-oriented retail along Livernois Avenue is notable, the study area is underserved in neighborhood-serving retail, particularly in grocery and products commonly found in full-service pharmacies.

This commercial corridor cannot sustain much further growth in the GAFO category. Focusing retail development efforts on supporting existing businesses, clustering businesses together, and ensuring access from throughout Detroit to this retail corridor will help sustain the current retail supply. Food & Beverage retail can benefit from the area’s wide customer base, as they will be relying on a larger customer base than many other study areas. However, ensuring success for these businesses must include encouraging strategic placement of existing and future restaurants near the center of the Avenue of Fashion corridor to truly benefit from destination shoppers.

- Neighborhood Goods & Services (NG&S):

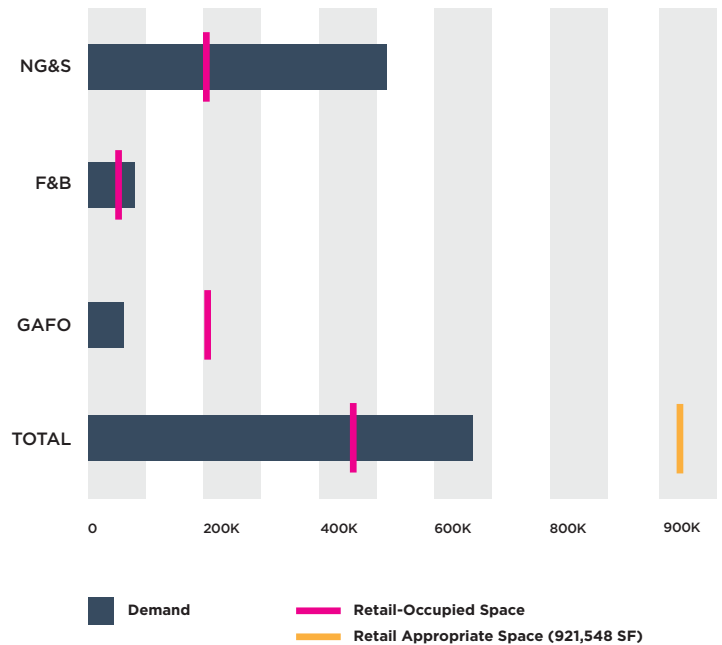
Diversifying the neighborhood-serving retail offerings will provide a greater level of service and access to residents. The two most underserved retail categories are grocery and pharmacy. The two existing grocery stores are not meeting the need for fresh food; supporting these existing grocers will increase NG&S access. Ensuring that residents without cars can patronize retail along this corridor will be critical for capturing the maximum amount of sales from within the community. Other NG&S retail, particularly pharmacy (personal care and household products) clustered with grocery retail if possible.

- Food & Beverage (F&B):

The corridor can support additional Food & Beverage tenants, which will help to drive business to Avenue of Fashion GAFO retailers. Each of these retailers should craft market-appropriate menus, sensitive to price.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

This commercial corridor cannot reasonably support more GAFO retailers. A more sustainable strategy for growth in this category would invest in and support existing businesses. One way to do this could be relocating businesses far from the Avenue of Fashion to be closer to where GAFO retail clusters along the corridor.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	519,971	203,790
F&B	85,058	51,900
GAFO	62,489	205,065
TOTAL	667,518	460,755













VACANCY RATE 22.5%

Supply and demand figures are modified to adjust for market conditions specific to Livernois-6 Mile. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

CREATE MARKET DISTINCTION BY BUILDING A BRAND IDENTITY AROUND THE AVENUE OF FASHION.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$67,841,564	239,189
 Alcohol at Home	\$3,490,387	9,757
 Personal/Household Care Goods and Services	\$86,887,019	249,190
 Pet Food & Services	\$2,180,899	9,879
NG&S SUBTOTAL	\$164,438,691	519,971
 Full-Service	\$14,027,463	37,794
 Fast Food	\$15,618,656	36,562
 Alcohol Away from Home	\$1,780,316	3,412
 Snacks & Non-Alcoholic Beverages	\$1,065,199	2,725
F&B SUBTOTAL	\$34,315,408	85,058
 Home Furnishings	\$4,018,458	19,470
 Apparel	\$6,147,786	24,346
 Electronics	\$1,982,818	2,412
 Sports Equipment	\$707,275	3,421
 Books, Music & Other	\$738,761	4,287
 Pet Supplies	\$254,743	1,258
 Automotive Equipment	\$260,766	1,385
GAFO SUBTOTAL	\$16,093,791	62,489
TOTAL GENERATED RETAIL DEMAND:	\$214,847,889	667,518

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)
 Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

LIVERNOIS-6 MILE

Retail development along this corridor can be bolstered by Livernois Avenue's status as the Avenue of Fashion. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Create a business improvement district, a principal shopping district, or a main street program. Organizations such as the Live6 Alliance and University Commons are leading the way in building a thriving retail environment. By further formalizing their efforts and providing additional services to aid the retail community, the corridor can have a unified approach to revitalization. Integrating a coordinated effort for this business district into a comprehensive citywide initiative should also be a priority. An additional option is to join the Micro-BID strategy presented in the citywide recommendations.	1
	Pursue a retail merchandising strategy that focuses on Food & Beverage (F&B) tenants near the Avenue of Fashion. Restaurants and bars are the primary driver for customers living outside the neighborhood who travel to this area. To further bolster the Avenue of Fashion as a shopping destination and increase demand for those tenants, Food & Beverage tenants should be recruited to create a fashion and food district near the cluster of GAFO retailers. Café seating should be provided at each F&B retailer, if feasible.	2
PLANNING	Identify more than one Retail Priority Block cluster in the commercial corridor. Due to the length of the route, spacing the retail clusters around more than one node would permit the surrounding neighborhoods to have walkable and accessible retail close to homes and places of business.	1
	Design and construct gateway elements into the Livernois-6 Mile commercial district that promotes the Avenue of Fashion, as well as a coordinated streetscape program for this neighborhood should be pursued with extensive input from the business owners. Livernois-6 Mile should be identified as a highly-specialized shopping opportunity within the city.	2
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for Mike's Fresh Market. A Grocery Enhancement Audit assesses four categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability (parking, access, loading and delivery systems, mechanical, electrical, and plumbing loads, etc.).	2
PROPERTY OWNERS	N/A	N/A
MARKETING	Create a marketing campaign for the Avenue of Fashion. Livernois-6 Mile has a unique point of market distinction as a historic corridor built around fashion. Currently, this corridor is not benefiting from a strong branding strategy nor is it fully promoting the unique retailers present. To drive additional demand to the corridor, a marketing booklet with a directory and map of retailers, the corridor's history, and a few select retailer stories is recommended, in addition to an "Avenue of Fashion Road Show" that showcases participating retailers to other neighborhoods, especially at Eastern Market and nearby universities.	1
SAFETY	N/A	N/A

NORTHWEST GRAND RIVER AVENUE

CORRIDOR HISTORY

Retail development along Northwest Grand River Avenue followed a similar pattern that can be seen throughout post-World War II suburban developments. Major thoroughfares, including Grand River Avenue, were zoned for commercial use along the length of the corridor. This zoning condition led to the production of tens of thousands of square feet for retail, intended to serve the nearby communities. Today, many of the vacant properties in the midst of up-and-coming local retailers are somewhat incongruous with the historic architecture along this corridor. Two of the notable neighborhoods informed the boundaries of this study area: Old Redford to the northwest and Grandmont-Rosedale to the southeast.

Grandmont-Rosedale, known for its historic collection of homes that represent a wide range of architectural styles, has maintained its reputation as a family-centric community with a strong network of community leaders, residents, and devoted retailers. Old Redford, anchored by the 1920s era Redford Theater, is developing a thriving artistic district in the midst of a revitalizing community. Community development organizations in these neighborhoods, as well as invested private developers, have had a marked influence on the growth of retail along this corridor.

CORRIDOR BOUNDARY RATIONALE

The Northwest Grand River commercial corridor extends from Northrop Street to Mettetal Street. Existing and ongoing studies and targeted investment areas were used to delineate the boundaries for this corridor.

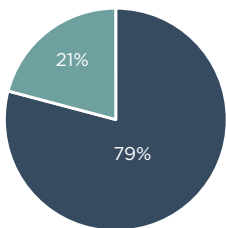
EXISTING RETAIL SUPPLY

The Northwest Grand River corridor contains 827,180 square feet of retail-appropriate space and includes a mix of retail typologies ranging from independent, in-line stores to large format retail outlets. The largest among all tenants in this commercial corridor is Meijer, one of the few in the city. Other national retailers along the corridor include discount retailers and quick service restaurants (e.g. Family Dollar, Little Caesars Pizza, McDonald's). After grocery retail, the second most common retail type by total square footage is beauty and nail salons, followed by take-out and drive-thru restaurants.

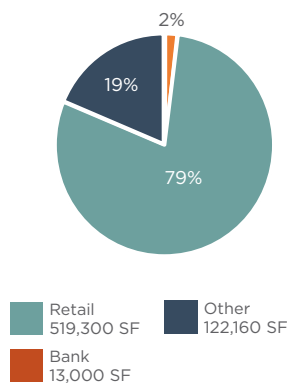
CONCURRENT STUDIES

At the beginning of 2017, The Planning Department began the Comprehensive Neighborhood Revitalization and Green Stormwater Infrastructure Plan for Northwest Detroit and Grand River and Fenkell Corridors. This study aims to improve the overall quality of life for residents and visitors alike by creating strategies to support a diversity of housing options, increase the vibrancy of the neighborhood, enhance the pedestrian experience, and address flooding and stormwater issues. Outputs of this analysis that impact the retail environment include a list of targeted developments and identification of nodes for public investment. These planned investments and accompanying zoning & policy recommendations seek to build density in these nodes and support a walkable retail-environment.

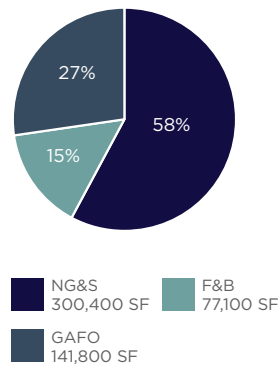
Occupancy Rate



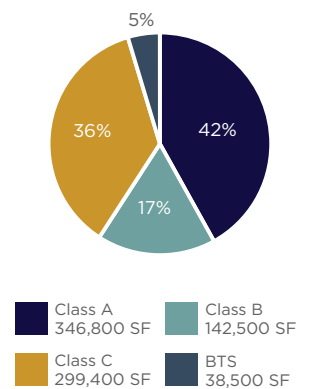
Tenant Type Distribution



Retail Type Distribution

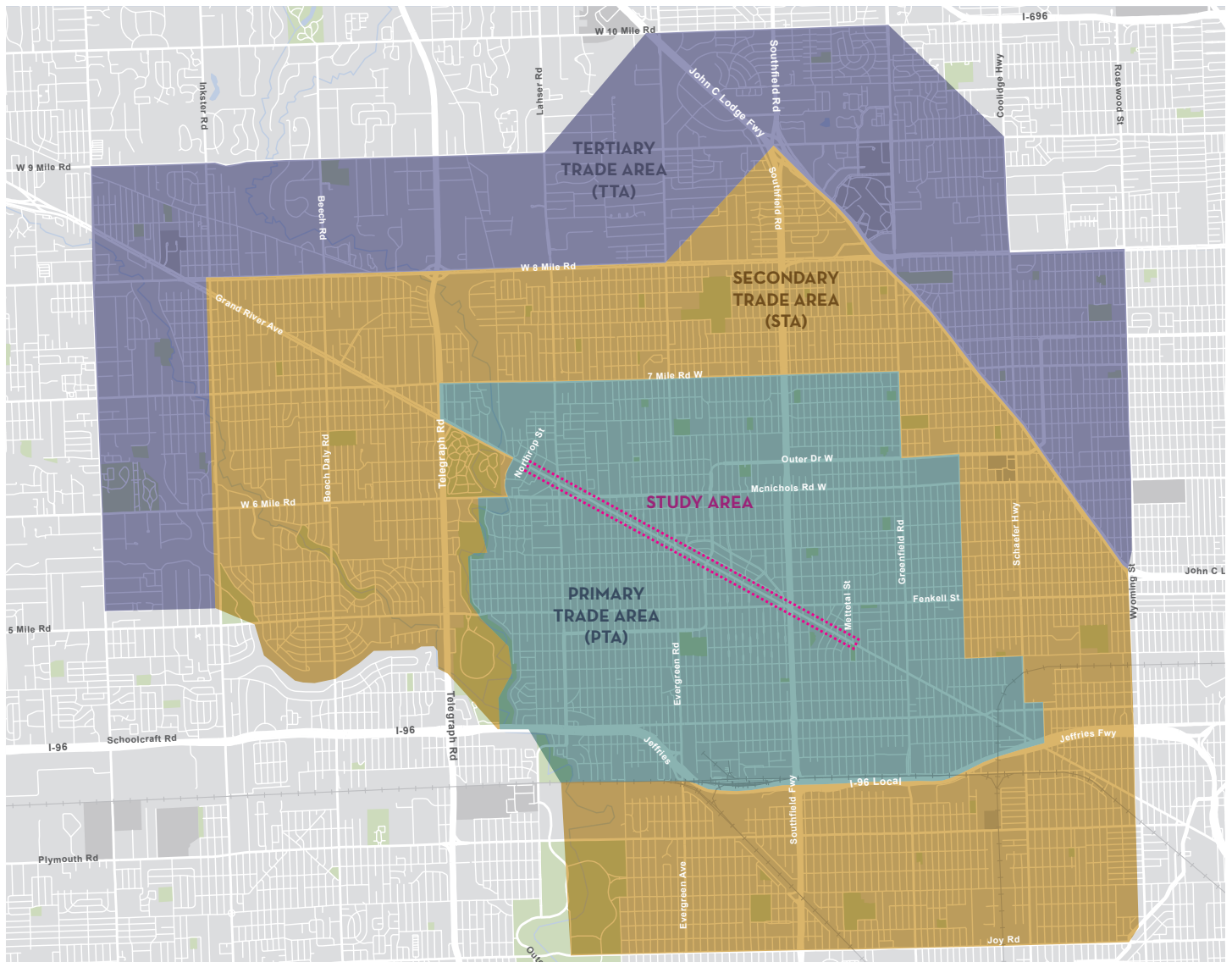


Class of Space Distribution



TRADE AREA ANALYSIS

With 22,200 commuters traveling along Northwest Grand River Avenue daily, the corridor's status as an important commuter thoroughfare allows for expansive trade areas because retail is driven primarily by visibility and access. Commuters driving west will likely patronize this corridor, extending the Secondary Trade Area boundary to Inkster Street to the west and Wyoming Street to the east. The Secondary Trade Area boundary is limited to the north by the retail competition in Livonia and along 8 Mile Road. Competition in Dearborn lessens the ability for retail in this commercial corridor to attract customers from the south. Customers south of Joy Road are more likely to choose Dearborn as a shopping destination because it is more convenient and has a more desirable mix of retail. Other factors that impact the trade areas for Northwest Grand River are highways, parks, and competition.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	75,669 (9% decrease, 2010-2017)	112,182	56,186	658,250
Households	31,588	46,420	28,945	252,089
Median Age	37	37	41	35
Median Household Income	\$32,737	\$33,284	\$44,164	\$27,372
Primary Nonwhite Ethnic Group	91% (African-American)	78% (African-American)	74% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	22%	20%	32%	20%
Single Parent Family Households	30%	28%	22%	31%
Average Number of Vehicles per Household	1.3	1.4	1.5	1.2
Households Without Access to Personal Vehicle	19%	16%	10%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

Northwest Grand River Avenue is a long commercial corridor and stakeholders throughout the city have struggled to determine where retail should cluster. There are several market conditions that make it difficult for retail to perform well along this corridor, even with significant unmet demand in two retail categories (NG&S and F&B). A lack of clustering, fast travel speeds, lack of signage for existing retailers, and exorbitant renovation/rehabilitation costs for building out retail space all impact the ability for retail along this corridor to meet the needs of its potential customers.

There is currently unmet demand across all retail categories. In the GAFO category, there is only demand for a small, locally owned or discount tenant, such as a pet supply store (3,500 square feet) or another home furnishings store. This submarket can support GAFO tenants because alternative shopping choices (such as Downtown or e-commerce) do not impact neighborhood retail as much as in other cities.

- Neighborhood Goods & Services (NG&S):

Although Northwest Grand River Avenue contains a large amount of grocery retail (almost 200,000 square feet), customers in this study area are still underserved for NG&S retail. This need is primarily within the pharmacy goods category (household care and personal care products).

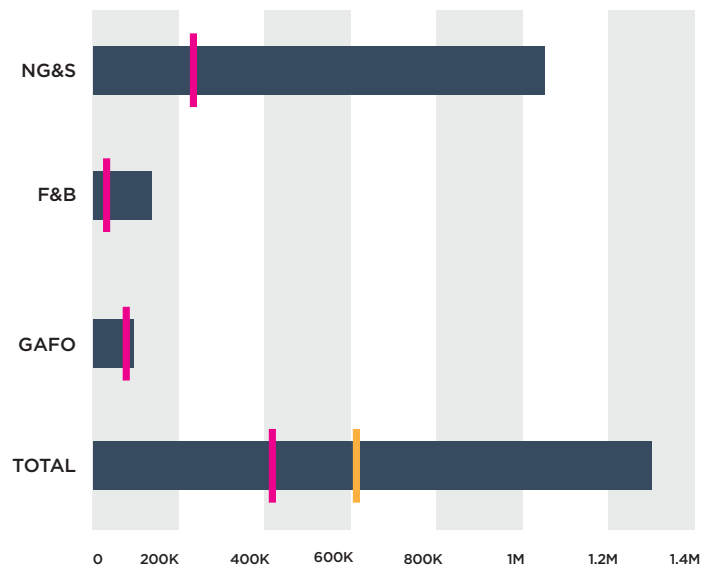
The current NG&S retail market is dominated by beauty and nail salons. When recruiting future retail tenants, pivoting away from this retail category towards other retail tenants, such as laundromats, pharmacies, or clothing repair shops, would help diversify the retail offerings and increase overall access to everyday shopping needs.

- Food & Beverage (F&B):

There is demand for both high quality and budget-conscious restaurants in this study area. In both cases, sit-down restaurants should be prioritized. As Northwest Grand River Avenue is a commuter corridor, there is demand for auto-centric F&B options. However, there is an opportunity for a retail clustering strategy to develop one or two sit-down restaurants clustered with other retail types.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

There is currently no demand for a high-price point GAFO retailer (such as a national jewelry store). However, there is demand for a GAFO retailer like an affordable clothing store. This retail type is currently underrepresented in the retail inventory.



■ Demand ■ Retail-Occupied Space
 ■ Retail-Appropriate Space (621,717 SF)

	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	1,053,760	238,056
F&B	137,243	54,720
GAFO	115,815	114,180
TOTAL	1,306,818	406,956

VACANCY RATE 20.9%

Supply and demand figures are modified to adjust for market conditions specific to Northwest Grand River Avenue. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

**BUILD ON EXISTING RETAIL TO
 A CREATE CONCENTRATED,
 WALKABLE COMMUNITY HUB.**



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$142,728,244	503,216
 Alcohol at Home	\$6,865,765	19,193
 Personal/Household Care Goods and Services	\$177,219,922	508,262
 Pet Food & Services	\$5,066,033	22,949
NG&S SUBTOTAL	\$331,927,100	1,053,760
 Full-Service	\$21,703,855	58,477
 Fast Food	\$28,232,178	66,089
 Alcohol Away from Home	\$2,974,412	5,700
 Snacks & Non-Alcoholic Beverages	\$2,503,672	6,404
F&B SUBTOTAL	\$55,643,130	137,243
 Home Furnishings	\$7,671,014	38,947
 Apparel	\$11,515,553	48,761
 Electronics	\$4,121,021	5,101
 Sports Equipment	\$1,389,069	7,017
 Books, Music & Other	\$1,166,854	7,216
 Pet Supplies	\$653,528	3,363
 Automotive Equipment	\$811,120	4,445
GAFO SUBTOTAL	\$27,638,827	115,815
TOTAL GENERATED RETAIL DEMAND:	\$415,209,057	1,306,818

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed.

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

NORTHWEST GRAND RIVER

Grand River Avenue is a long, frequented thoroughfare that also features a unique historical identity. These strengths can be leveraged by targeting a focal point for future development that targets commuters and serves the needs of the local community. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Create a business improvement district, a principal shopping district, or a main street program in conjunction with the Grandmont Rosedale Development Corporation and other community organizations that have independent but vested interests in Grand River Avenue. An additional option is to join the Micro-BID strategy presented in the citywide recommendations.	1
	Pursue a merchandising mix that clusters restaurants and entertainment venues. This mix is more appropriate due to the increased density of the neighborhoods on the study area's southeastern edge. To the northwest, lower density neighborhoods can support two or more small clusters of Neighborhood Goods & Services retailers, supplemented with Food & Beverage tenants.	2
PLANNING	Identify more than one Retail Priority Block cluster in the commercial corridor. Due to the length of the route, spacing the retail clusters around more than one node would permit the surrounding neighborhoods to have walkable and accessible retail close to homes and places of business. The retail cluster growing around the Meijer at Westbrook and Grand River Avenue is an excellent example of how co-locating retail benefits all tenants.	1
	Design and construct gateway elements for each node along Grand River Avenue. There are two distinct nodes that can be further defined to gain retail notoriety among residents, commuters, and visitors to the areas. For the Grandmont-Rosedale cluster, consider smaller elements with historic character, while at the Old Redford cluster, larger elements would be more appropriate to match the scale of the community.	2
	Explore the feasibility of a big box store location near Meijer (21431 Grand River Ave.). An additional big box store would benefit from the high traffic counts and similar customer base. New big box development should be required to have a flexible design to suit various tenant types and sizes over time.	2

	RECOMMENDATION	PRIORITY LEVEL (1-3)
SMALL BUSINESS	<p>Conduct a Grocery Enhancement Audit for Royal Fresh Market. A Grocery Enhancement Audit assesses four categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability (parking, access, loading and delivery systems, mechanical, electrical, and plumbing loads, etc.).</p>	2
PROPERTY OWNERS	N/A	N/A
MARKETING	<p>Conduct a campaign that promotes Northwest Grand River as a “safe place for business.” Retailers and customers share concerns for the corridor’s safety. Factors such as irregular hours of operation, high traffic speeds, and flashing green lights along the corridor communicate an unsafe environment.</p>	2
SAFETY	N/A	N/A

OSBORN

CORRIDOR HISTORY

Osborn sits on the northeast corner of the City of Detroit. Named for the local high school, Osborn's residents are engaged with promoting progress throughout the neighborhood. Examples of this energy can be found in projects such as the rejuvenation of Calimera Park. What used to be a typical urban park that suffered from a lack of maintenance is now a central feature of the community. The concerts, poetry readings, and barbecues that occur at the park serve as both neighborhood activities and as examples of what can happen when a community binds together.

Gratiot Avenue epitomizes auto-centric retail developments. The retail along this corridor caters largely to the commuters who use Gratiot to move in and out of the city. The retail supply contains drive-thru retailers, shopping centers with large parking lots, and other retail locations that are not located within a walkable environment. Moving forward, matching the growth and development of the Osborn community with retail will be a chance to increase the level of service to both travelers and residents.

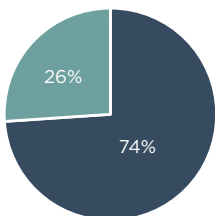
CORRIDOR BOUNDARY RATIONALE

The commercial corridor for Osborn flanks Gratiot Avenue from Saratoga Avenue to Bringard Drive. Retail that extends northeast past Bringard Drive is excluded from the corridor as it is more closely associated with the shopping centers at the intersection of 8 Mile Road and Gratiot Avenue.

EXISTING RETAIL SUPPLY

There is 176,400 square feet of retail-appropriate space in the Osborn commercial corridor. The retail within the Osborn commercial corridor contains primarily automobile-oriented retail. The majority of the retail square footage is located in retail strip centers and drive-thru fast food restaurants, each of which contain an abundance of available parking, and a handful of inline retailers with no dedicated parking. Unlike the other study area corridors, retailers that sell clothing and apparel are in the top three most common retail types. Beauty and nail salons are the most common retailer type in the study corridor, followed by clothing and apparel, then take-out or drive-thru restaurants.

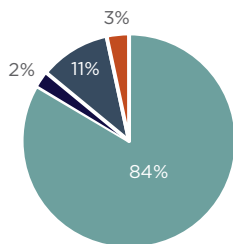
Occupancy Rate



Occupied
130,400 SF

Vacant
46,000 SF

Tenant Type Distribution



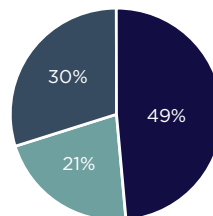
Retail
108,900 SF

Other
14,350 SF

Office
3,100 SF

Bank
4,050 SF

Retail Type Distribution

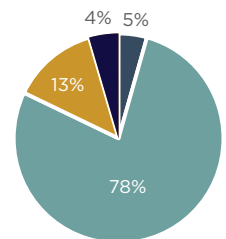


NG&S
52,920 SF

GAFO
32,480 SF

F&B
23,500 SF

Class of Space Distribution



Class A
7,700 SF

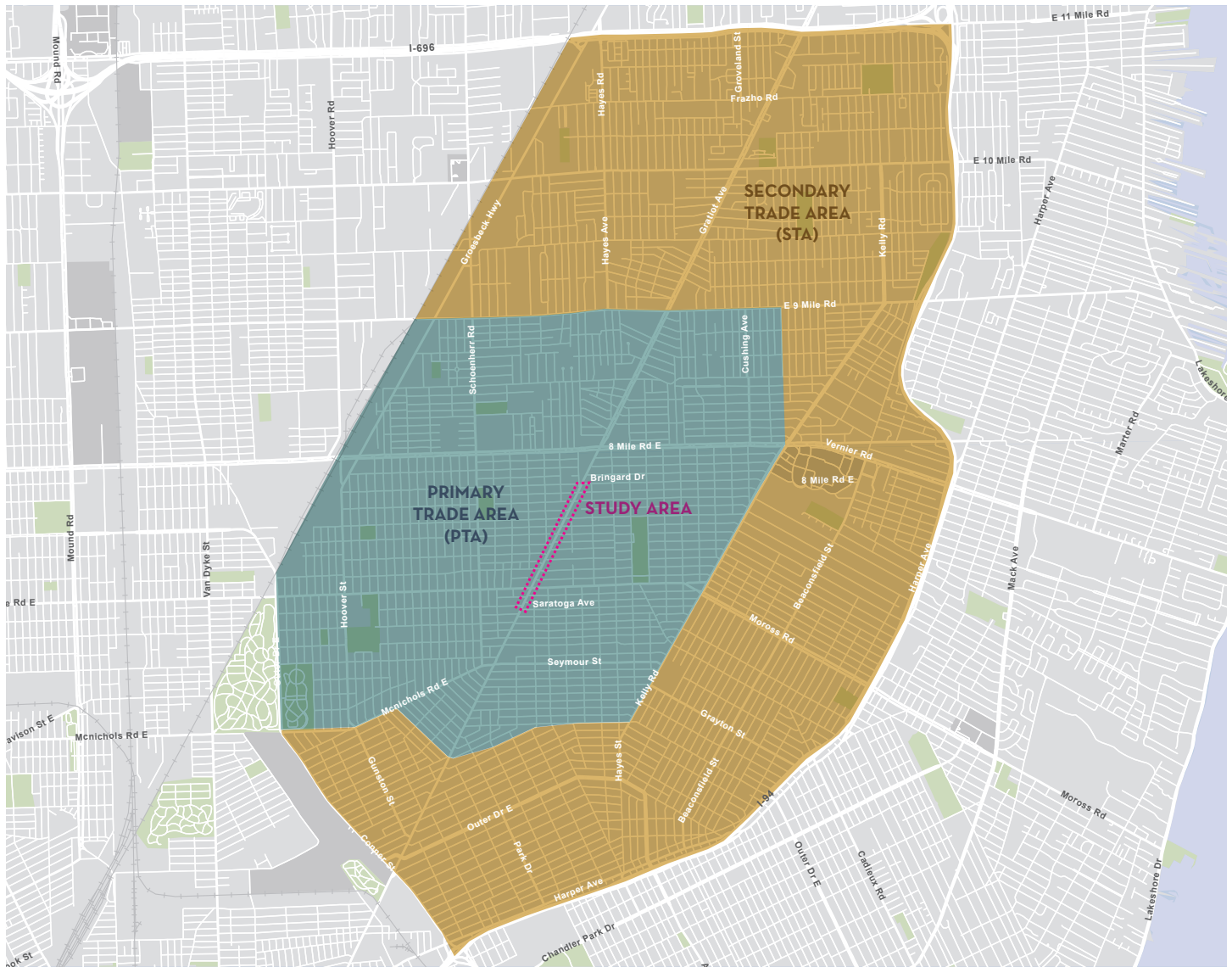
Class B
137,200 SF

Class C
23,500 SF

BTS
8,000 SF

TRADE AREA ANALYSIS

The most highly trafficked of all the commercial corridors studied, Gratiot Avenue is along the route of 24,400 commuters each way daily (SEMCOG, 2016). Gratiot Avenue's status as a commuter corridor allows for trade areas that extend north, as there is potential for customers traveling through the corridor to stop for errands such as grocery shopping or picking up a meal. The retail along 8 Mile competes directly with retail within the commercial corridor. Trade areas for this study area are limited primarily by other major roads (particularly Groesbeck Highway) and the railway with its adjacent industrial development that serves as a geographic barrier to potential customers.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	55,661 (17% decrease, 2010-2017)	89,446	658,250
Households	18,286	34,118	252,089
Median Age	32	36	35
Median Household Income	\$32,051	\$38,051	\$27,372
Primary Nonwhite Ethnic Group	76% (African-American)	55% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	17%	21%	20%
Single Parent Family Households	35%	26%	31%
Average Number of Vehicles per Household	1.4	1.5	1.2
Households Without Access to Personal Vehicle	14%	13%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

The Osborn study area is underserved in all retail categories. The commercial corridor has a prime location along Gratiot Avenue and there is an opportunity to develop a thriving retail cluster that contains a diverse retail mix of high quality stores with affordably priced retail across all three categories. Osborn’s study area corridor has a pre-existing retail cluster at the intersection of Seven Mile East and Gratiot Avenue. Recognizing that retail has already begun to cluster at this intersection is important, as the market has already identified this location as appropriate for a wide range of retail types.

Maximizing the potential of this retail cluster will not only involve developing a diverse retail mix, but ensuring it is widely accessible to Detroit residents. Detroit’s population is no longer as car-oriented as previous generations, and developing retail centers that can be reached by foot, bike, and bus will be critical to effectively capturing the maximum sales from Osborn’s trade areas.

- Neighborhood Goods & Services (NG&S):

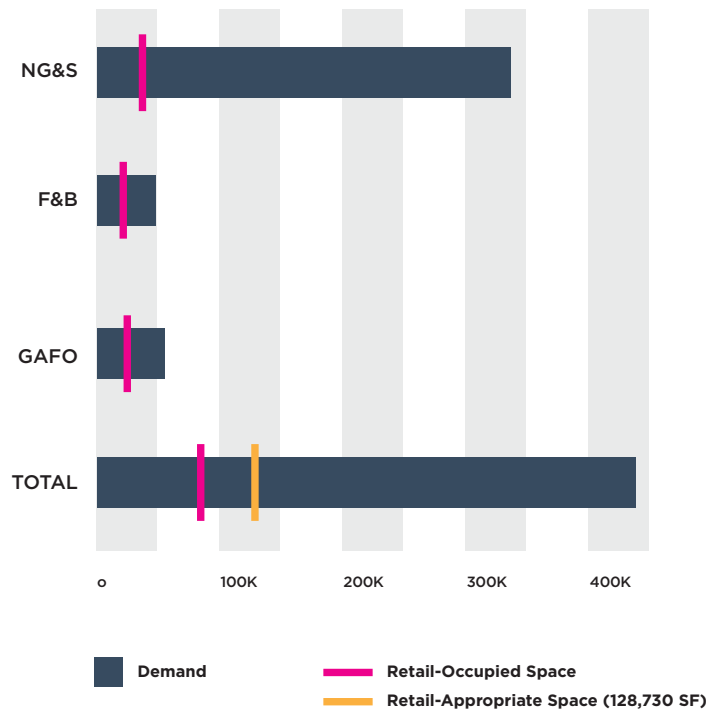
There is demand in this study area for both national and locally-owned grocery stores. In addition, a greater mix of neighborhood-serving retail is supportable in this corridor. The current mix contains largely beauty and nail salons, with few stores dedicated to essential services. Future tenanting should diversify offerings and ensure clustering, particularly if a national grocer is attracted to the area.

- Food & Beverage (F&B):

There is currently demand for one higher end, sit-down restaurant or several family-oriented restaurants. The current F&B mix contains mostly take-out or drive-thru options. These uses are important and serve a need, but the community can support two or three additional restaurants that also serve as community gathering spaces.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

This study area is well-served with GAFO retail. Additional demand is divided into several spending categories, none of which are large enough to support additional retail. Future efforts should bolster currently existing retailers and assisting them in maximizing their potential sales through storefront renovations, increased visibility and signage, and interior renovations.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	338,064	37,545
F&B	48,430	16,485
GAFO	55,182	24,735
TOTAL	441,676	78,765

VACANCY RATE 26%

Supply and demand figures are modified to adjust for market conditions specific to Osborn. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

UNMET DEMAND AND A CONCENTRATED NODE OF RETAIL AT SEVEN MILE AND GRATIOT CAN SERVE AS BUILDING BLOCKS.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$44,411,267	168,814
 Alcohol at Home	\$1,985,933	5,677
 Personal/Household Care Goods and Services	\$50,090,758	155,945
 Pet Food & Services	\$1,541,224	7,298
NG&S SUBTOTAL	\$98,133,698	338,064
 Full-Service	\$7,338,064	21,029
 Fast Food	\$8,574,849	21,158
 Alcohol Away from Home	\$953,290	1,870
 Snacks & Non-Alcoholic Beverages	\$947,626	2,578
F&B SUBTOTAL	\$18,490,912	48,430
 Home Furnishings	\$3,607,287	18,315
 Apparel	\$5,535,549	23,439
 Electronics	\$1,847,633	2,287
 Sports Equipment	\$617,940	3,122
 Books, Music & Other	\$466,695	2,886
 Pet Supplies	\$286,756	1,475
 Automotive Equipment	\$342,065	1,875
GAFO SUBTOTAL	\$13,277,985	55,182
TOTAL GENERATED RETAIL DEMAND:	\$129,902,595	441,676

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

OSBORN

Osborn's burgeoning retail landscape offers an opportunity to develop concentrated, pedestrian-friendly shopping nodes at sites along Gratiot Avenue. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Adjust retail development expectations for this corridor. Gratiot Avenue is a seven-lane roadway with over 30,000 daily traffic trips. Under these conditions, it is extremely difficult to create a sense of a unified, double-sided, and walkable main street environment.	1
	Organize retailers into a Micro-BID, a business association or as a main street organization. This will provide the opportunity for retailers to coordinate efforts and resources, as well as provide the neighborhood with a platform to share their input on issues such as hours of operation, quality of offering, etc.	1
	Recruit new retail for the corridor at the intersection of Gratiot Avenue and Seven Mile East. This hub of retail, although suburban in nature, serves as the primary node for the corridor. There are many opportunities for new businesses within nearby vacant buildings or lots nearby.	2
PLANNING	Focus on creating walkable mixed-use developments with private, internalized sidewalks, side streets, or internalized plazas and walkways, rather than attempting to foster walkable environments along the automobile-centric Gratiot Avenue and its sidewalks. These options include community strip centers, retail pad sites, and ground-level retail located at the base of multifamily, office, or hotel buildings. Activate the parking lots of Mike's Fresh Market and adjacent shopping centers with infill development or park space to promote walkability.	1
	Retail space along Gratiot Avenue should be set back at least 30 feet from the public right-of-way. Parking should be permitted within this setback. Sidewalks, adequately removed from Gratiot Avenue traffic to foster a sense of safety for non-vehicular travelers, should also be accommodated within this setback.	1
	Explore the feasibility of a big box store location near the intersection of Gratiot Avenue and 7 Mile. An additional big box store would benefit from the high traffic counts and similar customer base. New big box development should be required to have a flexible design to suit various tenant types and sizes over time.	2
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for Mike's Fresh Market. A Grocery Enhancement Audit assesses four categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability (parking, access, loading and delivery systems, mechanical, electrical, and plumbing loads, etc.).	2

	RECOMMENDATION	PRIORITY LEVEL (1-3)
PROPERTY OWNERS	N/A	N/A
MARKETING	N/A	N/A
SAFETY	N/A	N/A

ROSA PARKS-CLAIRMOUNT

CORRIDOR HISTORY

The Rosa Parks-Clairmount commercial corridor is four blocks away from Gordon Park, which marks the site of the first of the 1967 riots. Before the riots, there was a thriving community of largely African-American-owned businesses along what was then 12th Street. Within a community of homes built around the turn of the 20th century, these businesses fostered a lively nightlife with a variety of bars and restaurants. Since the riots, these rows of retailers have been torn down and the road has been renamed Rosa Parks Avenue. A nonprofit cooperative opened the Virginia Park Shopping Plaza as part of an early revitalization effort.

The upcoming development of the nearby Herman Kiefer Hospital is a sign of renewed investment in this neighborhood after over half a century of population decline. To adequately serve the needs of the community, emphasis on the nearby populations who support the Virginia Park Shopping Plaza is critical for developing neighborhood-serving retail.

CORRIDOR BOUNDARY RATIONALE

For Rosa Parks-Clairmount, the study area corridor is the block that contains Virginia Park Community Plaza Shopping Center (Rosa Parks Boulevard from Euclid Street to Blaine Street). Although Clairmount Avenue and other streets within the neighborhood are home to retail, the residential building stock and lack of visibility hinder their potential. This is especially true for short term retail success, as Virginia Park Community Plaza Shopping Center contains the most retail appropriate space.

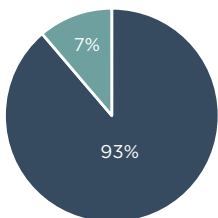
EXISTING RETAIL SUPPLY

The Rosa Parks-Clairmount study area corridor includes one shopping center, Virginia Park Community Plaza Shopping Center. After the 1967 riots, the preexisting retail was torn down and the Virginia Park Community Plaza Shopping Center was built to service the residents in the wake of losing all previous retail. This center contains 74,000 square feet of retail space and is anchored by Family Foods Super Store, a locally-owned, independent grocer.

CONCURRENT STUDIES

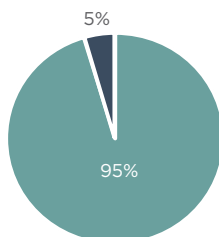
The Detroit Planning & Development Department, in partnership with the Gensler consultant team, simultaneously conducted a Neighborhood Revitalization Framework and a Landscape Stewardship Plan. The Revitalization Framework looks at a myriad of land use, regulatory, and socio-economic conditions to design strategies that stabilize the community and improve the built and natural environment of the study area. The Stewardship Plan's primary purpose is to create interventions to improve the aesthetic condition of the neighborhood with a secondary mission of determining the feasibility of vacant to productive land conversions. The team is also responsible for consulting with the efforts to redevelop the Herman Kiefer Site.

Occupancy Rate



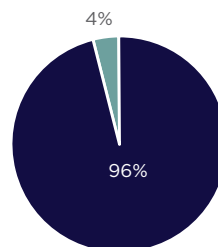
Occupied
68,700 SF
Vacant
5,300 SF

Tenant Type Distribution



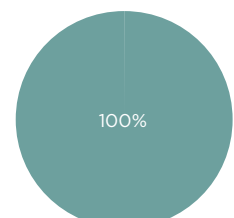
Retail
65,500 SF
Other
3,200 SF

Retail Type Distribution



NG&S
63,000 SF
F&B
2,500 SF

Class of Space Distribution



Class B
74,000 SF

TRADE AREA ANALYSIS

Rosa Parks-Clairmount's trade areas were drawn referencing accessibility as the primary factor. Three- and five-minute drive times and major roadways (I-94, I-96, Grand Boulevard, and John C. Lodge Freeway) were used as references to identify the primary customer populations.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	11,373 (24% decrease, 2010-2017)	13,889	658,250
Households	4,413	7,193	252,089
Median Age	39	40	35
Median Household Income	\$23,150	\$17,292	\$27,372
Primary Nonwhite Ethnic Group	91% (African-American)	88% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	21%	22%	20%
Single Parent Family Households	32%	35%	31%
Average Number of Vehicles per Household	1	0.8	1.2
Households Without Access to Personal Vehicle	35%	42%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

In many ways, the Rosa Parks-Clairmount is still experiencing the aftershock of the 1967 riots. The neighborhood was once a hive of activity, with retail storefronts lining what was 12th Street. The neighborhood shopping center was designed for customers that were primarily arriving by car, and consequently the retail in the center sits far back from the road, an unattractive condition for customers now arriving by foot or bicycle.

Rosa Parks-Clairmount’s retail needs have changed, but the retail center has not. Currently, there is a grocery store and a convenience store, but many residents report leaving the neighborhood for most grocery items or doing without these services altogether. In addition, the level of service retailers can provide is dramatically stunted due to the layout of the center itself. In addition to retail, customers in the Rosa Parks-Clairmount study area lack significant gathering spaces. There is opportunity to conscientiously invest in retail that better serves both the retail and community needs of the surrounding neighborhoods. An opportunity for targeted investment is to create a clear connect between the Herman Kiefer development and the Virginia Park Community Plaza Shopping Center along Blaine Street with wayfinding, right-of-way enhancements, and anchor tenancing.

- Neighborhood Goods & Services (NG&S):

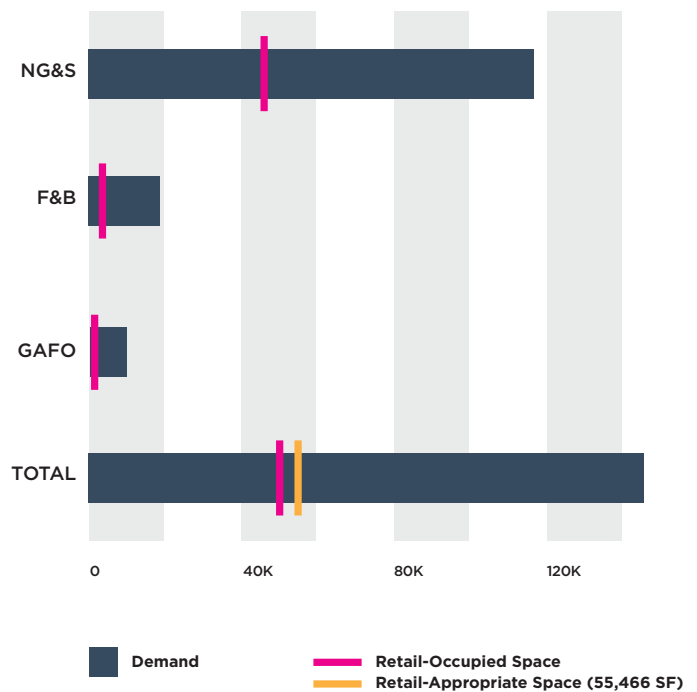
There is an opportunity to increase the level of NG&S service within this commercial corridor. There is also opportunity for a drug store.

- Food & Beverage (F&B):

There is enough demand to support a family restaurant, such as a diner or buffet-style restaurant, as well as additional take-out restaurants. Critical factors to consider when evaluating potential tenants include the price range of their food options and their ability to foster community gatherings. Conversations with stakeholders revealed that the neighborhood lacks F&B options in general, and there is a limited number of spaces for the community to meet. Pairing retail with public space could increase the ability for the restaurant to service the need for a gathering space while not placing the additional cost of space on the retailer.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

There is too little demand in this study area to support a full GAFO retailer. Emphasis should instead be placed on bolstering the other two retail categories.











	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	118,070	47,250
F&B	18,774	1,875
GAFO	9,924	0
TOTAL	146,767	49,125

VACANCY RATE 7.1%

Supply and demand figures are modified to adjust for market conditions specific to Rosa Parks-Clairmount. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$13,406,795	54,654
 Alcohol at Home	\$565,901	1,654
 Personal/Household Care Goods and Services	\$17,778,381	59,709
 Pet Food & Services	\$401,220	1,982
NG&S SUBTOTAL	\$32,173,375	118,070
 Full-Service	\$3,400,893	9,746
 Fast Food	\$3,203,954	7,906
 Alcohol Away from Home	\$213,716	419
 Snacks & Non-Alcoholic Beverages	\$151,894	413
F&B SUBTOTAL	\$7,079,701	18,774
 Home Furnishings	\$446,737	2,268
 Apparel	\$1,079,040	4,569
 Electronics	\$401,670	497
 Sports Equipment	\$156,850	792
 Books, Music & Other	\$159,025	983
 Pet Supplies	\$38,656	199
 Automotive Equipment	\$46,517	255
GAFO SUBTOTAL	\$2,444,272	9,924
TOTAL GENERATED RETAIL DEMAND:	\$41,697,347	146,767

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

CREATE A TOWN SQUARE AT VIRGINIA PARK SHOPPING COMMUNITY PLAZA SHOPPING CENTER TO SERVE AS A NEIGHBORHOOD GATHERING PLACE.

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

ROSA PARKS-CLAIRMOUNT

The Virginia Park Community Plaza Shopping Center represents a unique opportunity to provide local residents with a mixed-purpose retail hub and community gathering space. In order to maximize the potential of this center, efforts should be made to provide a sustainable mix of retail and improve pedestrian accessibility to the site. **There are several overarching conclusions and recommendations, applicable to all corridors studies, and are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Engage and provide support to the ownership of the Virginia Park Community Plaza Shopping Center to improve the shopping center's condition and increase the retail mix on-site. As the only major retail solution along the corridor and in the portion of the neighborhood west of the John C. Lodge Freeway, this shopping center has the potential to serve as the neighborhood's town center.	1
	Organize retailers into a Micro-BID, a business association, or a main street organization. This will provide the opportunity for retailers to coordinate efforts and resources, as well as the neighborhood to have a platform to share their desires such as input on hours of operation quality of offering, etc.	1
PLANNING	Construct walkways , preferably buffered by grass and trees, from the sidewalks along Rosa Parks Boulevard to the center of Virginia Park Community Plaza Shopping Center. This step is necessary to better accommodate the neighborhood's high percentage of shoppers without car access.	1
	Investigate the opportunity to offer a community gathering space at the shopping center in lieu of a section of surface parking area. Options include re-greening a portion of the lot or constructing a structure for temporary uses such as performances or a farmer's market.	1
	Consider a pad site opportunity in the parking lot between the shopping center and the Williams Senior Citizens Center. This site is a great opportunity for a Food & Beverage tenant looking to provide outdoor seating, which will further activate the expansive parking lot.	1
	Explore infill development opportunities to meet additional demand. One opportunity exists along the east side of Rosa Parks Boulevard, across the street from the shopping center. Each of the lots immediately adjacent to Rosa Parks Boulevard are vacant and city-owned. Additional opportunities at sites with great visibility and direct access to a larger customer base (perhaps from Henry Ford Hospital or the planned Herman Kiefer redevelopment) should be investigated for their ability to provide for the local community and capture sales from customers outside the area. The parcels at the northwest intersection of John C. Lodge Service Drive and Clairmount Avenue are ideal for a convenience-oriented retailer to capture commuters exiting the freeway and going home daily.	1
	Enhance the pedestrian connection along Blaine Street to the Herman Kiefer development. As a direct connection between the two sites, there is an opportunity to create a retail anchor (ideally a Food & Beverage tenant) at the intersection of Blaine Street and Rosa Parks Boulevard. This connection could also provide a unique experience along Blaine Street by directing customers to and from the Herman Kiefer site.	1

	RECOMMENDATION	PRIORITY LEVEL (1-3)
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for Family Foods Super Store. A Grocery Enhancement Audit assesses four categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability (parking, access, loading and delivery systems, mechanical, electrical, and plumbing loads, etc.).	3
PROPERTY OWNERS	N/A	N/A
MARKETING	Conduct a campaign that promotes the shopping center as a “safe place for business.” Retailers and customers (especially in the Boston-Edison neighborhood) share a concern for safety at the center. Upon invested ownership and initial improvements, send a flyer marketing the Retail Priority Block(s) to surrounding residents and consider hosting a community event to communicate that the shopping center is a place for all.	3
SAFETY	N/A	N/A

RUSSELL WOODS

CORRIDOR HISTORY

Russell Woods is a small community in Northwest Detroit with strong middle-class roots. Area homes, built between the 1920s and 1940s, were intended for middle and upper-middle class workers; Russell Woods was also considered part of Detroit's Jewish Quarter. However, the original homeowners soon made way for the influx of African-American families in the 1950s.

Russell Woods can attest much of its foundation as a modern community to the influence of African-Americans during the mid-century period. During this period, famed architect Nathan Johnson designed several homes in this neighborhood, and the Russell Woods Area Association was founded during this period in 1958. Russell Woods contains two commercial corridors, one along Dexter Avenue and the other along West Davison Street between Dexter Avenue and John C Lodge Freeway. Retail storefronts along Dexter continue to reflect the lingering effects of the riots, while retail along Davison is largely auto-centric, catering to both residents and travelers through the corridor.

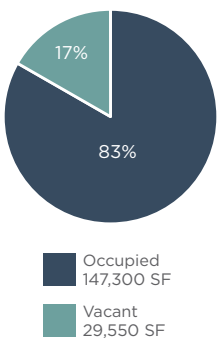
CORRIDOR BOUNDARY RATIONALE

Russell Woods' retail corridor flanks both West Davison Street and Dexter Avenue. On Dexter Avenue, the study area corridor is largely contiguous between Sturtevant Avenue and West Davison Street, while along West Davison Street, retail is interspersed with shopping centers and pad sites alongside parking lots and non-retail uses between Dexter Avenue and John C. Lodge Freeway.

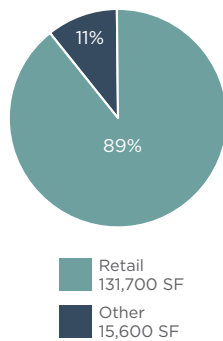
EXISTING RETAIL SUPPLY

The portion of the Russell Woods commercial corridor along Dexter Avenue is primarily inline retail with little to no setback from the street, while the retail along West Davison Street is flanked by non-contiguous pad sites and strip centers, including national retailers such as Atlas Market, Foot Locker, and Dollar General. In total, the area's occupied retail space equals 176,850 square feet. Discount supply stores dominate the retail supply in this study area.

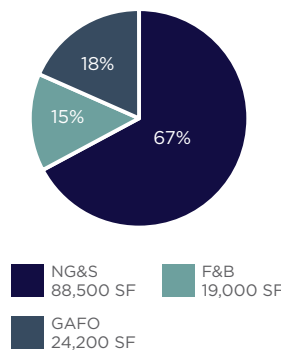
Occupancy Rate



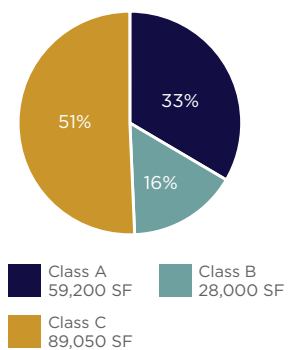
Tenant Type Distribution



Retail Type Distribution

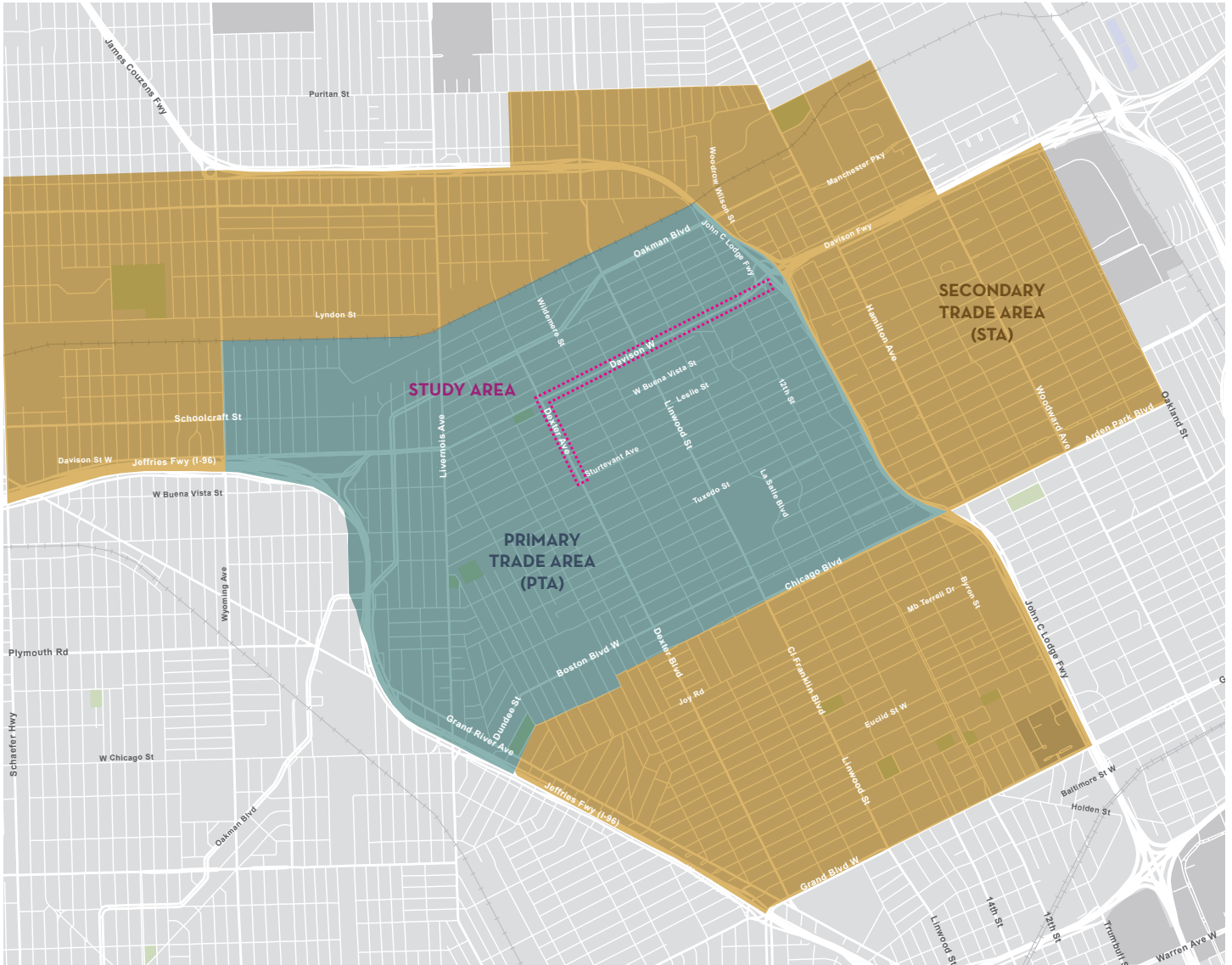


Class of Space Distribution



TRADE AREA ANALYSIS

Trade Areas for retail within the Russell Woods study area are particularly impacted by the surrounding road network. John C. Lodge Freeway and the CSX rail tracks limit connectivity to nearby neighborhoods, negatively impacting the ability for a customer from outside the Russell Woods neighborhood to routinely patronize this commercial corridor as a primary shopping destination. The Primary Trade Area is thus bound on the west by I-96 and on the east by the Lodge Freeway. Competition and industrial uses also have an important impact on the size of the trade areas.



DEMOGRAPHIC ANALYSIS

	PTA	STA	Detroit
Population	27,050 (24% decrease, 2010-2017)	36,808	658,250
Households	11,839	15,047	252,089
Median Age	37	38	35
Median Household Income	\$22,140	\$21,465	\$27,372
Primary Nonwhite Ethnic Group	94% (African-American)	92% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	18%	17%	20%
Single Parent Family Households	34%	33%	31%
Average Number of Vehicles per Household	0.9	0.9	1.2
Households Without Access to Personal Vehicle	34%	36%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

There is a significant amount of unmet demand for NG&S retail (approximately 149,000 square feet), primarily within the grocery and personal care/household goods categories. For F&B and GAFO retail, this commercial corridor is healthier. Russell Woods' relatively low vacancy rate also indicates that the current market is doing well and has the potential to grow. Tenanting strategies and building out retail to suit new tenants should target neighborhood-serving retail that is clustered, accessible, and well-designed. Pairing convenience retail, such as a clothing repair shop or a grocer that sells affordable fresh foods, and additional retail types, such as a sit-down restaurant, would allow for the creation of a unified retail district.

Retail in this submarket should be targeting the local populations first. Ensuring that retail is tenanted by business owners that cater to these communities and that these locations are accessible to a wide range of individuals will be critical to ensuring these retailers achieve their maximum potential.

- Neighborhood Goods & Services (NG&S):

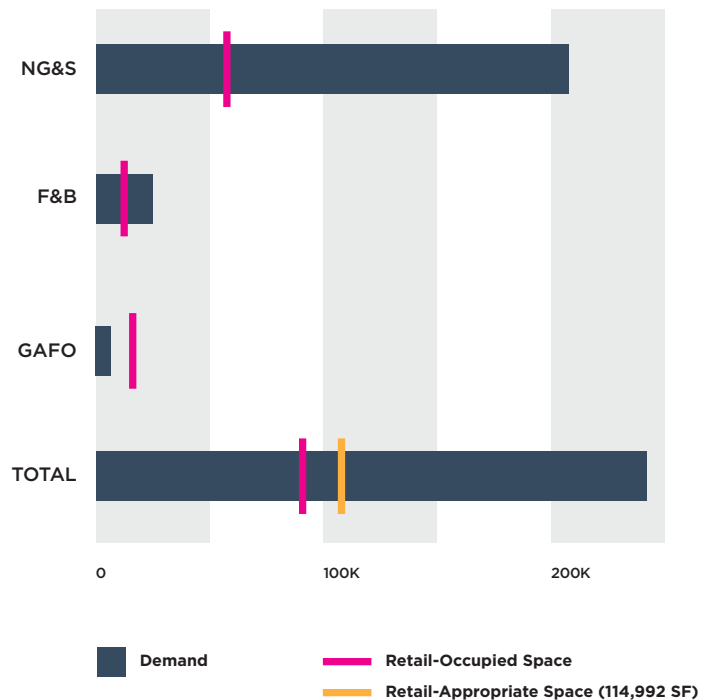
The work underway to bring an Aldi into the neighborhood is supported by the findings of the market analysis. In addition to a grocery store, other neighborhood-serving retail such as a pharmacy and services such as dry cleaning and shoe repair are appropriate retailers for this commercial corridor. Convenience retail do best when clustered together, as customers prefer to accomplish multiple errands in one trip.

- Food & Beverage (F&B):

The take-out restaurants along Davison Avenue are adequately serving most of the demand for F&B in this study area. Over time, some of this demand can be repositioned into sit-down restaurants, such as a diner or other affordable options. In the short term, there is room for one or two sit-down restaurants. Ensuring that any additional restaurants are well advertised to the community and fall within an accessible price range will be critical to long-term success.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

Currently, there is no additional demand for GAFO retail in this study area. The emphasis in retail strategies should be placed primarily on the NG&S retail category.

















	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	206,916	57,968
F&B	23,170	12,600
GAFO	9,439	15,450
TOTAL	239,524	86,018
	VACANCY RATE	16.7%

Supply and demand figures are modified to adjust for market conditions specific to Russell Woods. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

CHANGE THE NEIGHBORHOOD'S PERCEPTION BY IMPROVING THE PHYSICAL CONDITIONS OF THE BUILDINGS AND THE CORRIDOR.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
 Food At Home	\$27,026,323	102,731
 Alcohol at Home	\$1,191,636	3,407
 Personal/Household Care Goods and Services	\$31,175,883	97,059
 Pet Food & Services	\$785,491	3,719
NG&S SUBTOTAL	\$60,179,333	206,916
 Full-Service	\$3,224,258	9,240
 Fast Food	\$4,909,469	12,114
 Alcohol Away from Home	\$461,293	905
 Snacks & Non-Alcoholic Beverages	\$334,834	911
F&B SUBTOTAL	\$8,929,854	23,170
 Home Furnishings	\$650,374	3,302
 Apparel	\$945,249	4,002
 Electronics	\$445,798	552
 Sports Equipment	\$118,843	600
 Books, Music & Other	\$92,888	574
 Pet Supplies	\$34,376	177
 Automotive Equipment	\$42,060	230
GAFO SUBTOTAL	\$2,329,588	9,439
TOTAL GENERATED RETAIL DEMAND:	\$71,438,775	239,524

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

RUSSELL WOODS

The retail along Davison Street is very car-centric. Creating a more NG&S-focused cluster would probably be more effective on Dexter Avenue, but issues with safety and the quality of the building stock will need to be simultaneously addressed with tenanting strategies. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Organize retailers into a Micro-BID, a business association or as a main street organization. This will provide the opportunity for retailers to coordinate efforts and resources, as well as give the neighborhood to a platform to share their input on issues such as hours of operation, quality of offering, etc.	1
	Consider identifying more than one Retail Priority Block cluster in the commercial corridor. Due to the length of the route, spacing retail clusters around more than one node would permit the surrounding neighborhoods to have more walkable, accessible retail to homes or places of business.	1
PLANNING	Address blighted buildings along Dexter Street , as blight is a prime deterrent for the development of new retail activity.	1
	Pursue an infill development strategy along Dexter Street. Many retailers along Dexter Street have adjacent parking or vacant lots, which detracts from the pedestrian-oriented environment desired by the community.	2
	Permit street (curbside) parking lanes within retail cores along West Davison Street. Parallel parking increases pedestrian safety by providing a buffer between the sidewalk and oncoming traffic, and slowing traffic speeds. Traffic analysis should be undertaken to determine this recommendation.	3

	RECOMMENDATION	PRIORITY LEVEL (1-3)
SMALL BUSINESS	N/A	N/A
PROPERTY OWNERS	N/A	N/A
MARKETING	N/A	N/A
SAFETY	N/A	N/A

WEST VERNOR CORRIDOR - MEXICANTOWN

CORRIDOR HISTORY

The West Vernor Corridor - Mexicantown is a robust neighborhood in Southwest Detroit. Reflective of its large Hispanic population and one of its corridors, the area was renamed as Mexicantown in the 1990s. It is a civically engaged neighborhood that received an influx of immigrant populations when the rest of Detroit's population declined. As a result of its unique character, the corridor is known as a destination anchor for its international food and beverage offerings. Many people who seek the more affordable and attractive housing of Detroit settle in Mexicantown and the surrounding neighborhoods, such as Hubbard Farms.

CONCURRENT STUDIES

The West Vernor / Southwest Detroit Neighborhood Framework Plan included both West Vernor Corridor study areas, as presented in this report. The plan outlines strategies, priorities, neighborhood strengths, and focused strategic investments intended to build upon the existing density and further the development of a walkable community with an actionable housing rehabilitation program, streetscape design work, and open space management initiatives.

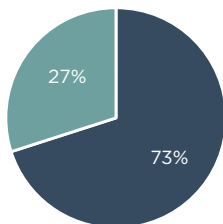
CORRIDOR BOUNDARY RATIONALE

This study looked at West Vernor Highway from Woodmere to I-75 Freeway. This area of West Vernor Highway is divided by a viaduct that runs across the corridor, breaking the corridor into two study areas. The West Vernor Corridor - Mexicantown study area includes West Vernor Highway from the viaduct to the I75 Service Drive and Bagley Street from 24th to the Service Drive.

EXISTING RETAIL SUPPLY

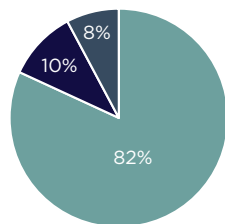
The West Vernor Corridor - Mexicantown contains 395,500 square feet of retail-appropriate space. The retail supply is tenanted by a large amount of liquor and convenience stores as well as several dollar discount stores. This study area has a high percentage (27%) of vacant retail space totaling 108,100 square feet. A number of strip centers, reflective of a car-centric community typology, separate the contiguity of the blocks, while another number of the blocks are disjointed by vacant lots, manufacturers, and single-sided retail blocks. Various Food and Beverage establishments along Vernor Highway and Bagley Avenue have existed here for decades.

Occupancy Rate



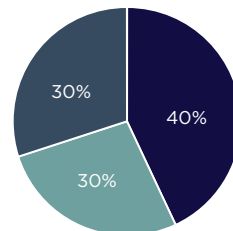
Occupied
287,300
Vacant
108,100 SF

Tenant Type Distribution



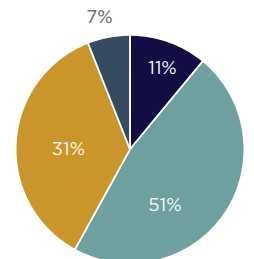
Retail
234,800
Office
29,600 SF
Other
22,900 SF

Retail Type Distribution



NG&S
94,200 SF
F&B
69,600 SF
GAFO
70,900 SF

Class of Space Distribution

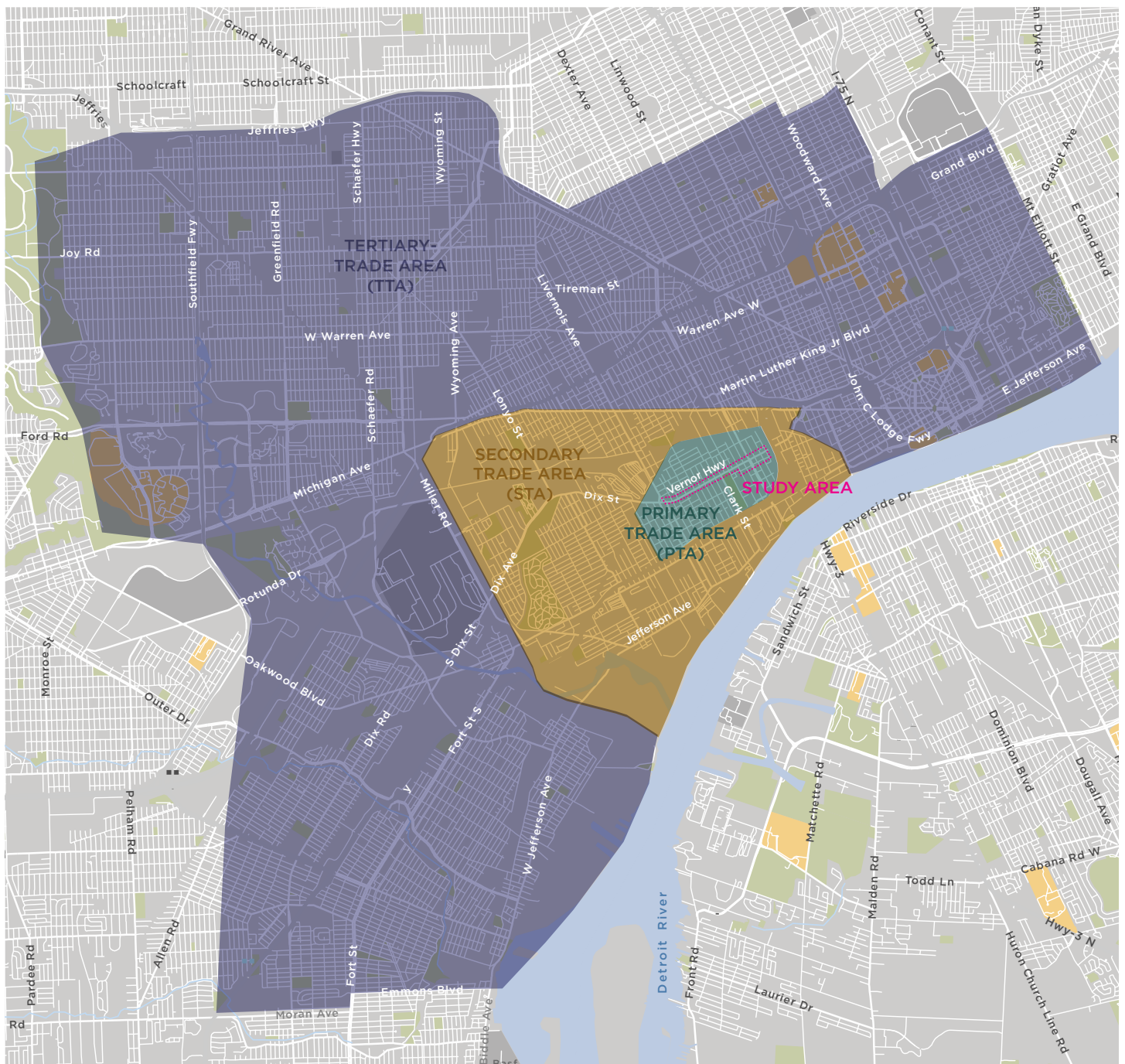


Class A
42,000 SF
Class B
202,100 SF
Class C
123,900 SF
BTS
27,400 SF

TRADE AREA ANALYSIS

For the West Vernor Corridor - Mexicantown study area, the surrounding road network is the primary factor for determining the trade boundaries. Highways, parks, natural boundaries, and gaps in the road networks are examples of physical and psychological boundaries that impact trade areas. While there is a pedestrian bridge on Bagley Avenue that connects residents over I-75, the highway serves as a physical and psychological barrier to customer sales, and the eastern boundary of the Primary Trade Area. The viaduct creates a similar obstacle to the west. The Secondary Trade Area is also determined by estimated commute times. The Tertiary Trade Area consists of neighborhoods that are likely to utilize the international retail offerings within the West Vernor Corridor - Mexicantown.

While retail within the West Vernor Corridor - Mexicantown benefits from customers originating outside of the delineated trade areas, patrons within these communities will be the most reliable populations needed to sustain the neighborhood's retail long-term.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	16,157 (4% decrease, 2010-2017)	32,127	317,858	658,250
Households	5,212	9,619	127,654	252,089
Median Age	28.9	30.9	36.8	37.4
Median Household Income	\$26,629	\$26,936	\$28,629	\$27,372
Primary Ethnic Group	71% (Hispanic or Latino)	60% (Hispanic or Latino)	48% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	5.4%	5.7%	15%	20%
Single Parent Family Households	33%	31%	33%	31%
Average Number of Vehicles per Household	1.2	1.3	1.2	1.2
Households Without Access to Personal Vehicle	27%	21%	23%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, September 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

The West Vernor Corridor - Mexicantown study area contains two segments of retail on parallel streets (Vernor Highway and Bagley Avenue), which are bounded by their identity as the neighborhood’s retail and restaurant corridors. Most of the retail along the corridor is in the Neighborhood Goods & Services (NG&S) category, including many ethnic markets, convenience/party stores, and discount dollar stores. The neighborhood is also home to a strong Food & Beverage (F&B) mix of retailers and manufacturers on both Bagley Avenue and Vernor Highway.

As illustrated below, there is a mismatch in demand and supply, indicating a need for retenanting strategies. As additional competition for Food & Beverage (F&B) retailers arise, fewer existing restaurants will be able to sustain their previous levels of sales. However, there are unmet opportunities for additional Neighborhood Goods & Services (NG&S) tenants. This finding aligns with the Community Assessment by the Southwest Solutions-Vista Partnership, which indicates a community desire for more salons, beauty shops and household supplies retailers.

- Neighborhood Goods & Services (NG&S):

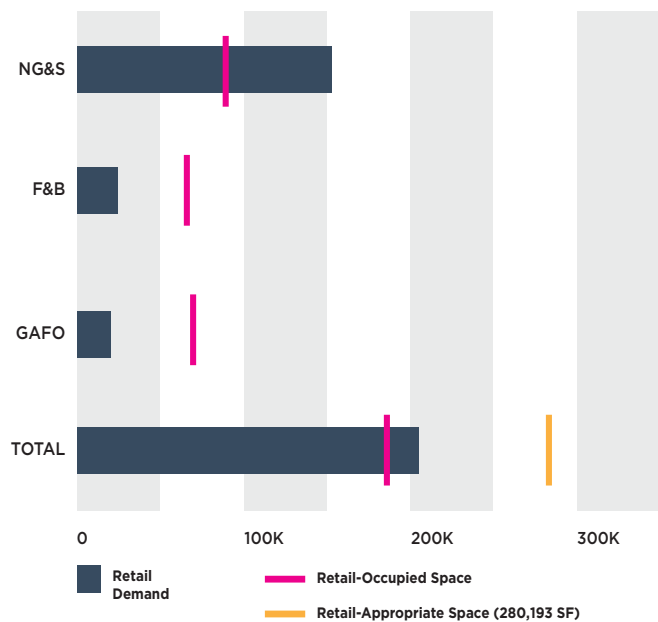
There is additional demand for roughly 87,900 square feet of NG&S retail. The NG&S supply in this study area is currently dominated by dollar, discount, supermarket, convenience, and liquor stores. An opportunity exists to secure barber shops, salons, and personal and household supplies retailers.

- Food & Beverage (F&B):

F&B is oversupplied by 22,300 square feet, which indicates that many restaurants and eateries in the study area are most likely subsisting on low sales per square foot. A sustainable strategy for growth in this category would be investing in and supporting existing businesses.

- General Merchandise, Apparel, Furnishings, and Other (GAFO):

This study area cannot reasonably support more GAFO retailers—this category is over-supplied by about 28,800 square feet. A sustainable strategy for managing this category would be to reconsider growth as a goal.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	153,842	65,903
F&B	26,919	49,249
GAFO	24,855	53,666
TOTAL	205,616	168,818

VACANCY RATE 27%

Supply and demand figures are modified to adjust for market conditions specific to the West Vernor Corridor - Mexicantown. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

THE CORRIDOR HAS A STRONG IDENTITY BUT NEEDS TO CONTINUE TO VISUALLY BRAND AND MANIFEST THIS IDENTITY.

**Vista Community Assessment Outcomes*. Southwest Solutions-Vista Partnership. 2014.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
Food At Home	\$19,892,882	81,095
Alcohol at Home	\$894,907	2,615
Personal/Household Care Goods and Services	\$20,073,443	67,418
Pet Food & Services	\$549,438	2,714
NG&S SUBTOTAL	\$41,410,670	153,842
Full-Service	\$4,646,937	13,317
Fast Food	\$4,671,553	11,527
Alcohol Away from Home	\$422,212	828
Snacks & Non-Alcoholic Beverages	\$458,398	1,247
F&B SUBTOTAL	\$10,199,100	26,919
Home Furnishings	\$1,805,094	8,746
Apparel	\$2,587,559	10,247
Electronics	\$1,053,230	1,281
Sports Equipment	\$302,469	1,463
Books, Music & Other	\$181,774	1,055
Pet Supplies	\$152,862	755
Automotive Equipment	\$246,181	1,308
GAFO SUBTOTAL	\$6,329,167	24,855
TOTAL GENERATED RETAIL DEMAND:	\$57,938,937	205,616

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

WEST VERNOR CORRIDOR - MEXICANTOWN

The following list of recommendations seeks to consider the factors that impact the West Vernor Corridor - Mexicantown's retail environment, such as meeting market equilibrium, improving physical conditions, initiating marketing campaigns, and activating streetscapes. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Activate vacancies by re-tenanting or exploring redevelopment opportunities.	1
	Conduct a study on why many retailers rely heavily on the cash economy , rather than accepting debit and credit cards. As a component of this study, analyze consumer behavior of the surrounding residents to determine their form of payment needs.	2
PLANNING	Clearly delineate Retail Priority Blocks for the West Vernor Corridor- Mexicantown. Resources should be focused on the blocks between Military to Morrell Street along Vernor Highway. F&B destination restaurants are bolstered along Bagley from I-75 to 24th St.	1
	Connect Bagley to Vernor Highway through infill development with retail on the ground floor and entrances at road intersections.	2
	Consider rerouting 18-wheeler traffic not associated with retail deliveries to allow for a decrease in dirt that impacts the pedestrian experience and to increase walkability, or alternatively limit times that 18-wheelers can traverse the neighborhood.	3

	RECOMMENDATION	PRIORITY LEVEL (1-3)
SMALL BUSINESS	Support the efforts of the Southwest Detroit Business Association and the Mexicantown Community Development Corporation (MCDC) and other allied organizations in their work to support the commercial district through technical assistance and financing. Consider the opportunity to join the Micro-BID strategy outlined in the citywide recommendations to provide supplemental support for the corridor.	1
	Consider the geographic expansion of the South West Detroit Business Association to include areas east of Clark Park.	2
PROPERTY OWNERS	N/A	N/A
MARKETING	Reinforce the West Vernor Corridor - Mexicantown's identity as a hub for newly-arrived immigrants to Detroit by translating signs, menus, sales instructions, and other assistance materials to Spanish.	1
	Consider co-branding the West Vernor Corridor - Mexicantown with the West Vernor Corridor - Springwells. ("bridge the viaduct") to promote a joint-neighborhood market distinction as a Hispanic cultural destination. To drive additional demand to the corridor, a marketing booklet with a directory and map of retailers, the corridor's history, and a few select retailer stories is recommended.	2
SAFETY	Conduct a campaign that promotes the retail corridor as a "safe place for business." Retailers and customers share a concern for the along the corridor. Consider hosting events that promote a vibrant retail corridor.	2

WEST VERNOR CORRIDOR - SPRINGWELLS

CORRIDOR HISTORY

In the middle of the 20th century, the neighborhoods along West Vernor Highway transitioned from a network of farming communities into an industrial hub. The neighborhood structure changed drastically as a result of the influx of industrial workers living within the West Vernor Corridor - Springwells area. At the same time new residents were moving in, wood frame commercial buildings were built to serve the retail needs of these new populations. The neighborhoods along West Vernor Highway have contained vibrant immigrant populations since its initial period of growth in the early 1900s. Today, the area is known for its strong community of Mexican-Americans and recently-arrived Mexican immigrants.

The commercial corridors along Springwells Street and West Vernor Highway experience a wide range of daily visitors, from trucks traveling between Detroit and Windsor to new families and long-time residents. The ability for retail to grow in the future will relate to its ability to help unite and serve all of these groups.

CORRIDOR BOUNDARY RATIONALE

This study looked at West Vernor Highway from Woodmere to I75 Freeway. This area of West Vernor Highway is divided by a viaduct that runs across the corridor, breaking the corridor into two study areas. The West Vernor Corridor - Springwells study area extends from West Vernor Highway from Woodmere Street to the viaduct, and includes Springwells Street, south to the viaduct.

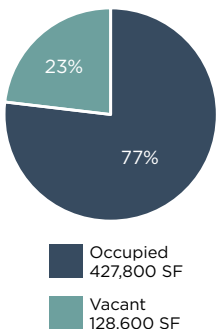
EXISTING RETAIL SUPPLY

The retail supply in the study area is comprised of 556,400 square feet of retail-appropriate space. Retail-occupied space along the corridor is primarily comprised of locally-owned, independent retailers. The national retail mix includes retailers catering to local populations, such as Rite Aid, Boost Mobile, and Domino's Pizza. Retail in this neighborhood serves the surrounding Hispanic population base. Full-service restaurants comprise the largest amount of total square feet, followed closely by grocery retail, and then beauty and nail salons.

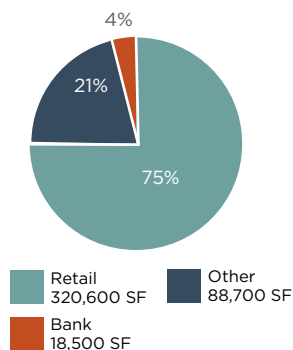
CONCURRENT STUDIES

The West Vernor / Southwest Detroit Neighborhood Framework Plan included both West Vernor Corridor study areas, as presented in this report. The plan outlines strategies, priorities, neighborhood strengths, and focused strategic investments intended to build upon the existing density and further the development of a walkable community with an actionable housing rehabilitation program, streetscape design work, and open space management initiatives.

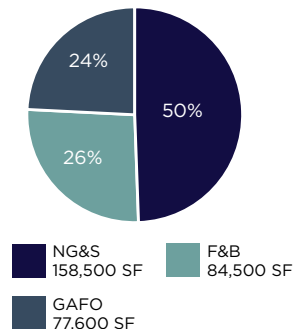
Occupancy Rate



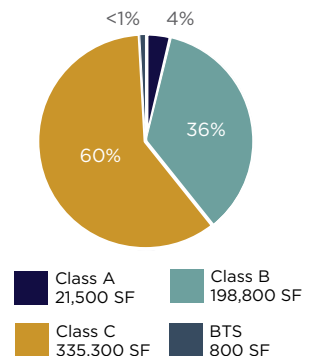
Tenant Type Distribution



Retail Type Distribution



Class of Space Distribution



TRADE AREA ANALYSIS

The presence of a Hispanic retail mix within the West Vernor Corridor - Springwells increases the size of the potential customer base due to its regional attractiveness as a restaurant cluster. However, the Primary Trade Area is confined to the boundaries of the I-75, the viaduct, and railways. The Secondary Trade Area is delineated by Census blocks with concentrations of Hispanic populations (i.e. the neighboring communities of Mexicantown, Boynton, West Dearborn and Lincoln Park). Tertiary levels of customer demand originate downtown and to the north of the West Warren Avenue.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	18,689 (10% decrease, 2010-2017)	154,986	131,459	658,250
Households	5,373	60,815	54,107	252,089
Median Age	28	33	34	35
Median Household Income	\$25,955	\$34,368	\$24,325	\$27,372
Primary Nonwhite Ethnic Group	56% (Hispanic or Latino)	68% (Hispanic or Latino)	69% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	10%	17%	22%	20%
Single Parent Family Households	23%	20%	32%	31%
Average Number of Vehicles per Household	1.2	1.4%	1.1	1.2
Households Without Access to Personal Vehicle	25%	14%	27%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA).



MARKET ANALYSIS CONCLUSIONS

The West Vernor Corridor - Springwells is unique in that its retail mix is largely defined by a large proportion of sit-down restaurants. However, like many other commercial corridors, the West Vernor Corridor - Springwells is highly underserved for NG&S retail. Consequently, this corridor serves both as a destination retail node within the City (along with its neighbor, the West Vernor Corridor - Mexicantown), as well as a shopping district. Merging these two identities will be a challenge when working to further develop retail in this commercial corridor.

- Neighborhood Goods & Services (NG&S):

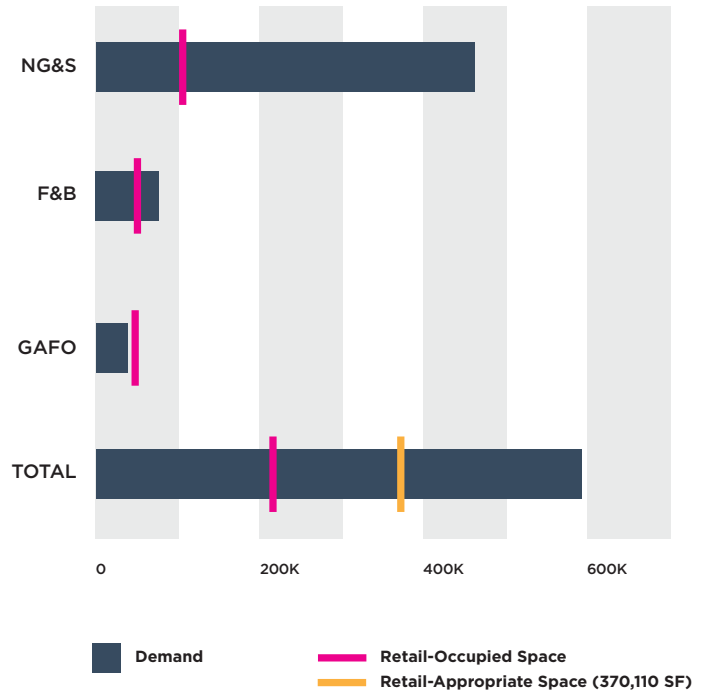
There is approximately 357,000 square feet of unmet demand in the NG&S retail category. Grocery retail and drug stores/pharmacies that sell day-to-day goods should be emphasized in future tenanting strategies. For the grocers already in the market, attention should be paid to ensuring that their facilities are meeting the needs of their customers, whether that be through helping them grow their fresh food departments, improve storefronts, and improve accessibility for customers traveling by foot or bike.

- Food & Beverage (F&B):

While there is demand for additional Food & Beverage retailers in this study area, the current supply is over-represented by sit-down restaurants. Rather than trying to recruit additional restaurants, the focus for development should include diversifying the F&B offerings to include bakeries, coffee shops, or take-out establishments, as well as supporting existing businesses. Maximizing the potential of the existing retail will help future businesses be more likely to thrive.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

The study area is currently slightly oversupplied in GAFO retail. Assisting existing businesses that already have a strong foothold in the community within this category should be prioritized before attempting to attract new GAFO retail.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	463,193	106,275
F&B	86,187	57,450
GAFO	43,952	51,720
TOTAL	593,332	215,445

VACANCY RATE 23.1%

Supply and demand figures are modified to adjust for market conditions specific to the West Vernor Corridor - Springwells. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

BUILD UPON THE AREA'S MARKET DISTINCTION AS A NEIGHBORHOOD WITH A CULTURAL MIX NOT FOUND ELSEWHERE IN DETROIT.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
Food At Home	\$58,942,220	240,283
Alcohol at Home	\$2,758,007	8,059
Personal/Household Care Goods and Services	\$61,192,670	205,518
Pet Food & Services	\$1,889,053	9,332
NG&S SUBTOTAL	\$124,781,949	463,193
Full-Service	\$14,204,763	40,708
Fast Food	\$15,298,300	37,749
Alcohol Away from Home	\$1,506,570	2,955
Snacks & Non-Alcoholic Beverages	\$1,755,414	4,775
F&B SUBTOTAL	\$32,765,046	86,187
Home Furnishings	\$3,182,502	15,419
Apparel	\$4,399,657	17,423
Electronics	\$1,769,633	2,152
Sports Equipment	\$552,200	2,671
Books, Music & Other	\$396,168	2,299
Pet Supplies	\$262,792	1,298
Automotive Equipment	\$506,153	2,689
GAFO SUBTOTAL	\$11,069,106	43,952
TOTAL GENERATED RETAIL DEMAND:	\$168,616,102	593,332

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

WEST VERNOR CORRIDOR - SPRINGWELLS

The West Vernor Corridor - Springwells is a walkable retail hub that contains a unique cultural mix not seen elsewhere in Detroit, and measures should be taken to market its cultural features. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Support the efforts of the Southwest Detroit Business Association and the Southwest Vernor & Springwells Business Improvement Program in their work to support the commercial district through technical assistance and financing. Consider the opportunity to join the Micro-BID strategy outlined in the citywide recommendations to provide supplemental support for the corridor.	1
	Consider expansion of the Mexicantown Main Street Program to include the West Vernor & Springwells commercial district as well (i.e., "bridge the viaduct" initiative).	1
PLANNING	Focus retail demand along contiguous retail blocks , if feasible. This density of retail along the corridor will secure the neighborhood's position as a retail destination for those near and far.	1
	Reinforce the West Vernor Corridor - Springwells as a destination for newly-arrived immigrants to Detroit by translating signs, menus, sales instructions, and other materials into Spanish.	2
	Incorporate local artisans into a design initiative targeting public spaces , particularly along West Vernor. These efforts could include bench designs, public art, district signage or similar efforts. In additions, efforts should be made to construct gateway signage that provides customers with a feeling that they are entering a distinct space.	3
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for all neighborhood grocers. A Grocery Enhancement Audit assesses 4 categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability - parking, access, loading and delivery systems, mechanical, electrical, and plumbing (MEP) loads, etc.	3
PROPERTY OWNERS	N/A	N/A

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MARKETING	Consider branding the community using the logo created through the 2013 Urban Neighborhood Initiatives. Vet the logo with the surrounding community before implementation.	1
	Create shared marketing materials with the West Vernor Corridor - Mexicantown (“bridge the viaduct”) to promote a joint-neighborhood market distinction as a Hispanic cultural destination. To drive additional demand to the corridor, a marketing booklet with a directory and map of retailers, the corridor’s history, and a few select retailer stories is recommended.	2
	Conduct a campaign that promotes the retail corridor as a “safe place for business.” Retailers and customers share a concern for the along the corridor. Consider hosting events that promote a vibrant retail corridor.	3
SAFETY	N/A	N/A

WEST WARREN

CORRIDOR HISTORY

The Village of Warrendale was annexed by the City of Detroit in the early 1900s, and many of the area's homes were built prior to the 1960s. Over time, the demographics of the community have evolved as the public schools experienced a period of upheaval in the 1990s and the mortgage crisis in 2006 led to an increase in home vacancy. Retail along this corridor was developed to be car-centric to serve commuters traveling along West Warren Avenue. The diversity of this neighborhood has contributed to a unique mix of retail along West Warren that stands in contrast to Fairlane Town Center just south of the study area corridor, which mostly contains national retailers.

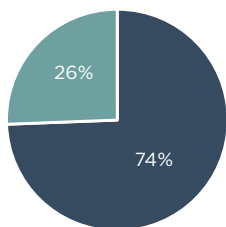
EXISTING RETAIL SUPPLY

The commercial corridor along West Warren Avenue is sandwiched between jurisdictional boundaries where there is a notable change in the character of retail while driving from the City of Detroit into Dearborn. CVS is one of the only national tenants within the study area.

CORRIDOR BOUNDARY RATIONALE

The commercial corridor for West Warren is primarily associated with the City's boundaries, from Evergreen Road (west) to Greenfield Road (east). Please note that the retail environment along West Warren extends further east past Greenfield Road into midtown.

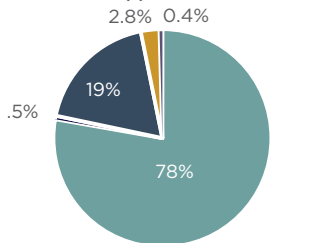
Occupancy Rate



Occupied
288,400 SF

Vacant
99,200 SF

Tenant Type Distribution



Retail
224,300 SF

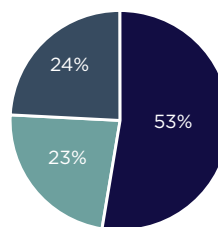
Other
53,400 SF

Gym/Studio
1,200 SF

Office
1,500 SF

Entertainment
8,000 SF

Retail Type Distribution

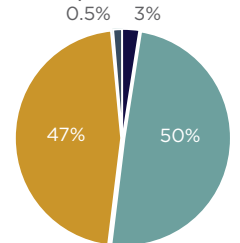


NG&S
118,100 SF

F&B
52,000 SF

GAFO
54,200 SF

Class of Space Distribution



Class A
9,700 SF

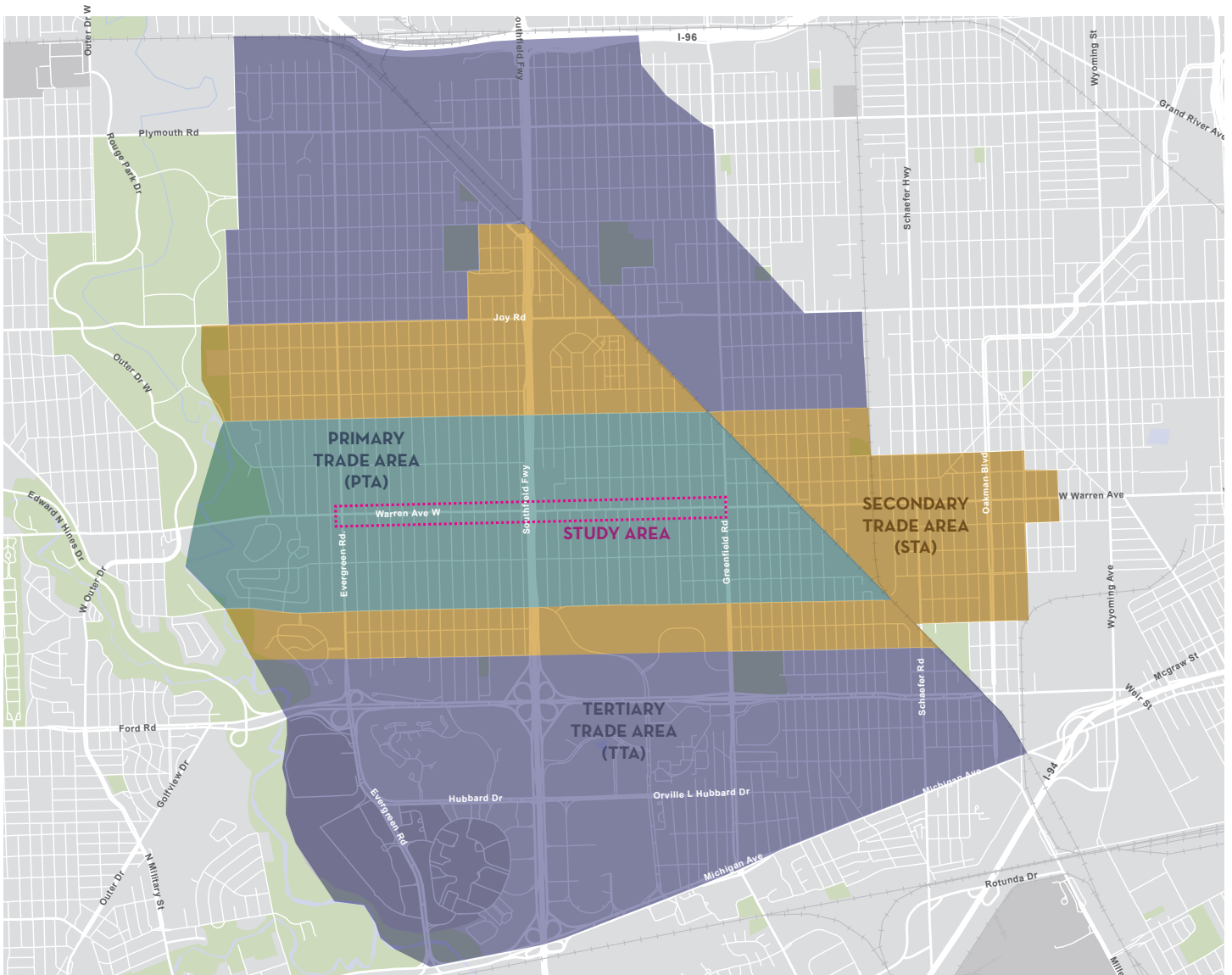
Class B
193,800 SF

Class C
182,200 SF

BTS
1,900 SF

TRADE AREA ANALYSIS

The retail mix of the West Warren Avenue study area has Primary, Secondary, and Tertiary Trade Areas due to an opportunity to draw from a wider customer base from nearby Dearborn and its concentrated Arab population. However, the ability for retail within the study area to capture customers is limited by the competitive impact of quality retail along West Warren outside of the City boundaries to the east, retail clusters in Dearborn, and the presence of Rouge Park to the west. The trade areas were often impacted by the presence of a major road, such as Michigan Avenue to the south and Joy Road to the north, as well as geographic and psychological barriers such as the railroad to the east and Rouge Park to the west.



DEMOGRAPHIC ANALYSIS

	PTA	STA	TTA	Detroit
Population	23,658 (3% decrease, 2010-2017)	24,258	37,058	658,250
Households	8,927	5,855	16,386	252,089
Median Age	29	29	32	35
Median Household Income	\$23,922	\$27,204	\$28,787	\$27,372
Primary Nonwhite Ethnic Group	27% (Arab)	63% (Arab)	54% (African-American)	80% (African-American)
Bachelor's Degree or Higher (Population 25+ years old)	16%	20%	22%	20%
Single Parent Family Households	30%	22%	26%	31%
Average Number of Vehicles per Household	1.4	1.4%	1.3	1.2
Households Without Access to Personal Vehicle	14%	14%	16%	25%

Source: US Census Bureau, US Bureau of Labor Statistics, Nielsen Company/Claritas Demographics and Business Facts reports created for Streetsense, April 2017. Figures for each trade area are recorded exclusive of one another (i.e. STA figures do not include PTA)



MARKET ANALYSIS CONCLUSIONS

The West Warren study area is currently underserved in NG&S retail and overserved in F&B and GAFO retail. Prioritizing access to neighborhood-serving retail and ensuring that the products offered both fit the needs of residents and are in the correct price range will be critical to ensuring success of any new retail.

The West Warren commercial corridor is a node for largely Middle Eastern retailers, particularly bakeries. These bakeries attract customers from neighborhoods beyond the Warrendale/Joy-Southfield area and provide an opportunity to foster a larger retail district identity in this study area. A strategic plan to unify this retail district in and out of the City of Detroit’s boundaries and develop the neighborhood-serving retail could foster the creation of a strong retail node for the community. In doing this, concerns that include a primarily auto-centric retail supply must also be addressed.

- Neighborhood Goods & Services (NG&S):

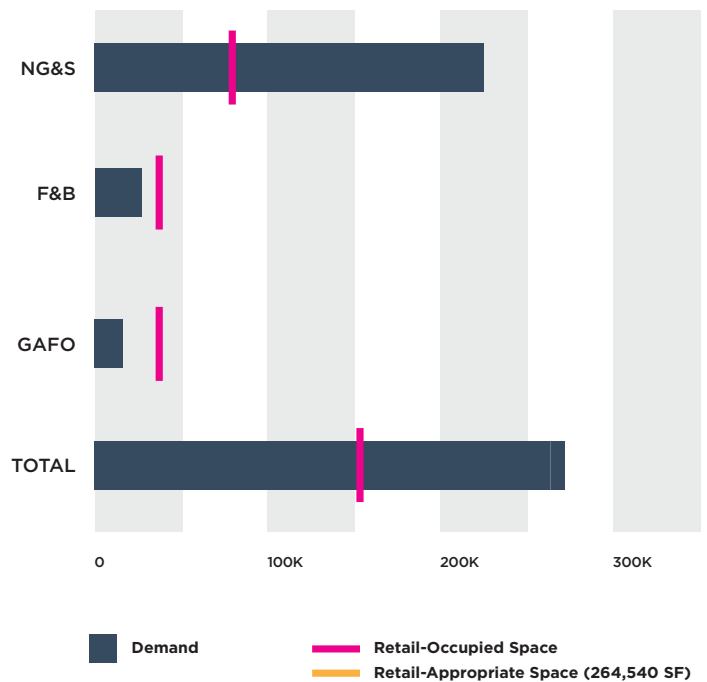
- Assisting the development and growth of existing businesses should be prioritized. Providing resources to expand fresh food selections and improve building quality can go far in increasing resident access to these important items without bringing in a new tenant. In the long-term, emphasizing tenants that cater towards the needs of the local community, such as pharmacies or salons, will balance the current mix.

- Food & Beverage (F&B):

- This study area is currently slightly oversupplied for F&B retail. Emphasis in the short term should be paid to supporting existing businesses through storefront improvements, broadening community visibility, and improving the retail experience along the West Warren corridor.

- General Merchandise, Apparel, Furnishings, & Other (GAFO):

- There is currently an oversupply of GAFO retail. Current retailers benefit from West Warren’s status as an ethnic retail destination. However, facilitating a true business district that encourages foot traffic will allow these businesses to attract customers who frequent other retail corridors. A clustering strategy moving forward will be critical to maximizing the sales potential in this neighborhood to fully support the existing retailers and foster potential for growth in the future.



	DEMAND (SF)	RETAIL-OCCUPIED SPACE (SF)
NG&S	225,408	80,475
F&B	27,781	38,220
GAFO	16,972	37,410
TOTAL	270,161	156,105
	VACANCY RATE	25.6%

Supply and demand figures are modified to adjust for market conditions specific to West Warren. Figures represent a blended demand which calculates a figure between high and low productivity as presented in the technical appendix.

BRIDGE THE RETAIL MARKET ACROSS THE SOUTHFIELD FREEWAY AND THE DETROIT-DEARBORN BORDER.



SUPPORTABLE SPACE BY CATEGORY

CATEGORY	TOTAL CAPTURED EXPENDITURES	DEMAND
Food At Home	\$28,991,808	118,188
Alcohol at Home	\$1,188,408	3,473
Personal/Household Care Goods and Services	\$29,358,777	98,603
Pet Food & Services	\$1,041,359	5,145
NG&S SUBTOTAL	\$60,580,352	225,408
Full-Service	\$4,461,559	12,021
Fast Food	\$5,631,887	13,184
Alcohol Away from Home	\$536,508	1,028
Snacks & Non-Alcoholic Beverages	\$605,444	1,549
F&B SUBTOTAL	\$11,235,398	27,781
Home Furnishings	\$1,085,302	5,510
Apparel	\$1,750,960	7,414
Electronics	\$652,131	807
Sports Equipment	\$212,780	1,075
Books, Music & Other	\$142,147	879
Pet Supplies	\$95,465	491
Automotive Equipment	\$145,050	795
GAFO SUBTOTAL	\$4,083,835	16,972
TOTAL GENERATED RETAIL DEMAND:	\$75,899,585	270,161

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

RECOMMENDATIONS AND STRATEGIES

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

WEST WARREN

Positioned adjacent to Dearborn, the West Warren study corridor contains a diverse retail landscape. West Warren can build off the success of its neighbor by improving building conditions and concentrating retail hubs. **Several overarching conclusions and recommendations, applicable to all corridors studies, are located in the last chapter of this report (pages 114-119).**

	RECOMMENDATION	PRIORITY LEVEL (1-3)
MANAGEMENT	Organize retailers into a Micro-BID, a business association or as a main street organization. This will provide the opportunity for retailers to coordinate efforts and resources, as well as give the neighborhood a platform to share their input on issues such as hours of operation, quality of offering, etc.	1
	Coordinate retail development efforts across Dearborn and Detroit. The area's customers within each city do not perceive the border as a boundary for sales. The cross-jurisdictional area would benefit from shared resources, such as funding, staff, and/or marketing campaigns to create a unified district. Specifically, efforts should be made to produce a guidebook that helps navigate the process of establishing a brick and mortar business on both sides of the City's border.	1
PLANNING	Consider identifying more than one Retail Priority Block cluster in the commercial corridor. Due to the length of the commercial corridor, spacing retail clusters around more than one node would provide surrounding neighborhoods with more walkable, accessible retail. Concentrating retail along West Warren Avenue will minimize the negative impact of non-retail uses interfering with the shopping continuity of the street. There will be areas of the corridor that are distinctly "retail-focused" while other areas will be accommodating of non-retail uses, such as professional offices and homes.	2
SMALL BUSINESS	Conduct a Grocery Enhancement Audit for Fairline Food Center. A Grocery Enhancement Audit assesses four categories essential to optimal operation: management/operations, merchandise and pricing, interior design, and architectural suitability (parking, access, loading and delivery systems, mechanical, electrical, and plumbing loads, etc.).	3
PROPERTY OWNERS	N/A	N/A
MARKETING	Create a campaign to promote West Warren as a multicultural street open to all and as a destination for urban agriculture and poultry breeding. Pair this campaign with events hosted by the Micro-BID, business association, or main street organization to activate the street and reinforce West Warren's market distinction.	3
SAFETY	N/A	N/A



CONCLUSION &
CITYWIDE
RECOMMENDATIONS





CONCLUSION

Detroit is dealing with both market and infrastructure concerns. The massive oversupply of low quality retail and vacant space is obvious, but this report found that these neighborhood study areas are still underserved in good quality, neighborhood-centric retail. Detroit has struggled to build and bolster these critical neighborhood retail centers since the city's heyday in the 1950s and early 1960s. Over the last several decades, a combination of factors has compounded to complicate retail business operations throughout the commercial corridors. A lack of understanding of what kind of retail is most supportable in these neighborhoods, a lack of quality, retail-ready building stock; an emerging understanding of the retail market, and a lack of resources dedicated towards targeted retail improvement efforts all need to be addressed in future efforts.

Neighborhood Goods & Services is by far the most underserved retail category in the study areas. Specifically, these communities can support but are not served by grocery, cleaning services and clothing repair shops, and pharmacies that sell a variety of personal products. It is often assumed that the market will take care of neighborhood-serving retail naturally, while restaurants and general merchandise retailers must be recruited to a market. This assumption has left a variety of communities, including those in Detroit, underserved in the most necessary retail category. Neighborhood-serving retail is a critical piece of creating a livable community, particularly given that many Detroit households do not have regular access to a vehicle or public transportation. Intentionally working to incorporate a larger number of NG&S retailers into retail development schemes will be a key piece of developing the retail markets within the study area corridors.

The disinvestment cycle in Detroit is indicative of a troubled retail environment. In a healthy real estate market, retail developers and landlords are incentivized to redevelop, make improvements, and tenant their properties. The

competitive nature of the market encourages the retail sector to maintain a positive growth and investment trend. However, the opposite trend occurs in Detroit. Detroit's developers and landlords are holding onto properties in the hopes that others will improve the neighboring properties, thus increasing the value of their land. Detroit's retail market is reactive rather than active. From this reactive stance, few developers and landowners are leading the charge in developing their properties. This leaves residents stuck in the cycle where they need and can support retail, but there is no immediate incentive to build the space to house the retail.

In addition, there is an abundance of retail space and vacant lots, but little understanding or guidance on where retail investment should be targeted. In an urban community, clustering retail is critical to fostering a successful retail district. Retail does best when clustered with other retail. Customers can go to one place to fulfill a variety of needs, and co-tenanted retailers benefit from shoppers who stop at multiple retailers. When retail is spread out, shoppers can be hesitant to frequent what may appear as the only open shop on the block. That being said, retailers grouped together can band together and market themselves as a group to the community. This is a necessary step in Detroit, as customers are often unaware of the options within their own neighborhoods. The roadblocks associated with this strategy are numerous, including absentee landlords, blighted buildings that are expensive to upgrade, and occasional difficulty encouraging retailers to work together. However, with a guided strategy on which blocks along each retail corridor are the most viable for retail, the resources that have been devoted to solving these problems can be focused and honed through a strategy that specifically targets which blocks along each retail corridor are the most viable for retail.

The future of retail in Detroit can be broken into phases. Ideally, the amount of retail servicing the community will grow and concentrate within specific retail nodes. Over time, as neighborhoods evolve and change, retail space can be built out for flexibility to be converted into other uses in the future. This highlights the need for flexible built-out space that can change in use over time. Regardless of size and tenant type, space built out for retail should be high quality and flexible to adapt in use over time. Larger spaces for incoming retailers that are supplying retail as well as communal gathering spaces for the community can be converted in the long term into smaller retail storefronts or change into ground-level office spaces.

In addition to flexibility, a paired parking strategy is needed to meet the needs of retailers and customers alike. As vacancy decreases in the retail nodes and more customers are drawn to the community, the availability of parking will decrease. It is important to explore creative solutions (e.g. a shared parking strategy) for the current parking supply, explaining the tradeoffs associated with additional lot development (e.g. loss of character and walkability), and identifying ways to increase modal split to other transportation options such as a public transportation, walking, or biking.

It is the goal of DEGC, Streetsense, and VD+B to present a sustainable strategy, rooted in serving the immediately surrounding neighborhood. A destination retail strategy places both the retailer and its surrounding neighborhood at risk. Consumers are fickle and are attracted to the latest trend and/or most compelling retailer of the week. By competing for this customer, instead of striving to meet the needs of its neighbors on a regular and continuing basis, a retailer's longevity is vulnerable.

To set retailers up for success, the following overarching recommendations are strategies that represent and respond to the needs of the community. Through strategic execution, these neighborhoods will increase their level of livability and establish much-desired vibrant retail corridors.

FINAL RECOMMENDATIONS

Following the report's release, the DEGC will be coordinating with citywide stakeholders to craft an implementation plan.

Management

RECOMMENDATION	PRIORITY LEVEL (1-3)
<p>Create a Micro-BID strategy. Micro-Business Improvement Districts (BIDs) function much like Business Improvement Districts or Principal Shopping Districts (PSDs) by providing resources and services to maintain a district's vibrancy, including clean and safe teams, programming, business attraction/retention services, and planning and development assistance. Unlike BIDs or PSDs, a Micro-BID serves multiple neighborhoods under one management entity. Each commercial corridor would share services and experience the same level of upkeep as neighboring corridors. Corridors with existing BIDs may elect to participate by allocating a percentage of their assessment to the Micro-BID.</p>	1
<p>Designate/recruit a Retail Manager for the city. The purpose of this role is to coordinate activities among the city's commercial district management organizations, share information, establish an "economy of scale" for purchasing items needed by everyone, and provide or give access to technical assistance when needed. Ideally, managers should serve in a supporting role at the Micro-BID organization, as detailed above.</p>	1
<p>Establish "core hours" for retailers throughout the city. Core hours should be enacted as a requirement to receive funds from special financing programs. A common issue throughout Detroit's commercial corridors is the lack of consistent opening hours for businesses. Incentivizing businesses to keep existing hours will help foster more predictability of hours within a commercial district. These core hours can be quite limited – 4:00pm to 6:00pm, Monday through Saturday, for example – with retailers able to expand operating hours on either earlier or later. Exceptions should be undoubtedly provided for religious reasons.</p>	1
<p>Create and nurture a retail "farm team." Under the direction of the Retail Manager, create and maintain a substantial pop-up strategy (like Hatch Detroit) to bring new retailers for short periods into available space to test the market and activate vacant retail space.</p>	2
<p>Hire staff to serve on corridor "clean and safe" teams. Potentially partner with a nonprofit organization or local high schools to hire staff assigned to each corridor to aid in sidewalk and public space upkeep, trash removal, and façade maintenance on a weekly basis.</p>	3

Planning

RECOMMENDATION	PRIORITY LEVEL (1-3)
<p>Clearly define Retail Priority Blocks for each corridor. This approach delineates an area for target retail/storefront improvements, new development, and investments. By clustering, rather than scattering, each dollar spent will be more impactful and will provide a greater probability of catalyzing adjacent improvements by the private sector.</p>	1
<p>Incorporate Retail Priority Blocks into small area plans. Work to resize corridors to the appropriate, market-supportable square footage overtime. Market-appropriate retail districts will be able to meet the needs of the community without creating excess competition among retailers for a smaller share of overall customer spending.</p>	1
<p>Improve street and sidewalk conditions for Detroit’s Retail Priority Blocks. Improvements should be made in partnership with the Planning & Development Department and the Department of Transportation. Within the Retail Priority Blocks, renovated and improved sidewalks, streetscapes, and street lights will improve the overall appearance and safety of retail clusters and improve the perception of safety for customers and retailers. Crosswalks should be placed at each intersection, and, for megablocks, be placed midblock with proper signage and design to slow on-coming traffic. Street lights should be illuminate the entire sidewalk alleys (as offered in DTE Energy’s Outdoor Protective Lighting program). When possible, widen sidewalks to 12 to 16 feet and create double-sided retail corridors.</p>	1
<p>Design traffic calming interventions at the Retail Priority Block(s). At this focused location, bulb-outs, speed bumps, and/or road diets should be considered to create a comfortable and safe pedestrian environment and to increase retailer visibility for passing traffic.</p>	1
<p>Reduce parking requirements in the Retail Priority Blocks. To support the mayor’s initiative to create more walkable neighborhoods, parking lots should be eliminated for neighborhoods with greater than 50% of total retail demand in the Neighborhood Goods & Services category.</p>	2
<p>Consider revamping the zoning code to limit additional retail development outside of identified Retail Priority Blocks. Areas outside of the corridor are prime for non-retail uses (as detailed in the Glossary).</p>	2

Planning (cont'd)

RECOMMENDATION	PRIORITY LEVEL (1-3)
<p>Clearly identify current and future parking zones and lots available for public use adjacent to the Retail Priority Blocks. Parking signage is not clear along most corridors, which causes customer frustration and contributes to additional sales leaving the corridor. Many corridors have limited public parking available adjacent to stores, and could benefit from a shared parking strategy with nearby vacant lots or underutilized parking lots.</p>	2
<p>Require the construction of flexible retail spaces in new developments. Retailers are increasingly requiring a varied amount of space to meet their needs. Target and other traditional big-box stores are experimenting with smaller prototypes. By constructing flexibility, developers will be able to attract a wider range of retail. Inline bays should be constructed at 15-25 foot widths and 60-90 foot depths to enable configurations as large as the building's footprint to subdivide spaces for startup businesses.</p>	2
<p>Accommodate outdoor cafe seating in corridors that have a Main Street typology and can support additional Food & Beverage outlets. Restaurants should be clustered and regulatory approval should be granted in advance of pursuing tenants as a component of the retail attraction and leasing strategy.</p>	3
<p>Consider regulatory action to prevent issuance of permits for used car lots to new establishments within designated Retail Priority Blocks. Smaller municipalities such as Greenville, SC; Ottumwa, IA; and Murfreesboro, TN have already or are currently considering similar bans.</p>	3
<p>Contact the real estate representatives of national retailers with poorly maintained properties. Some national retailers are complicit with the cycle of disinvestment that has plagued corridors across the city. As each corridor seeks to revitalize, the national retailers should be held accountable too. Suggest targeted improvements such as parking lot resurfacing, shelving replacement, inventory overhaul, etc. in both written and verbal correspondence.</p>	3
<p>Address environmental safety issues posed by brownfields or other contaminated sites, such as landfills, automobile service centers, and gas stations, especially in Retail Priority Blocks. By identify and remediating any contaminants, the barrier to potential redevelopment and subsequent retail location will be mitigated.</p>	3

Small Business

RECOMMENDATION	PRIORITY LEVEL (1-3)
<p>Maximize the potential of existing retailers. Existing retailers have already proved themselves in the market and typically have established ties within the community. Providing support to existing businesses can increase the overall level of retail service without adding additional retailers into the market (e.g., assisting an existing grocer with expanding their fresh food and produce selection).</p>	1
<p>Identify retailers capable of and willing to open second and third locations and provide technical and financial assistance with these expansion efforts. Existing retailers have already proven their ability to succeed in a market and face fewer hurdles when securing financing from lenders. Lending support to these businesses and encouraging expansion will help increase retail access without relying exclusively on new-to-market businesses which face additional challenges. (Best Practice: https://nycloccallending.typeform.com/to/OdnKiz)</p>	1
<p>Create paths for retailers to purchase properties. Owning, instead of leasing, is an opportunity to ensure retailer longevity along a corridor by managing occupancy costs and maintaining building quality.</p>	1
<p>Reinforce the importance of affordability when providing assistance to small businesses across Detroit, including while evaluating potential Motor City Match business plans. Each business should be sensitive to the price threshold of the surrounding residents to prioritize the goal of increasing opportunities for existing residents.</p>	1
<p>Continue to clearly educate retailers of resources available through public and private sources as part of Retail Boot Camp. This educational campaign should also explain the broader implications of participating in these resource programs (i.e., business debt vs. personal debt; fear of improvements resulting in increased rents, etc.).</p>	2
<p>Consider instituting a business signage design event, similar to the CoSIGN efforts undertaken in Cincinnati, to engage neighborhood artisans in the design and fabrication of new, three-dimensional commercial signs for existing stores and businesses. (Best Practice: https://www.cosigncincy.org/)</p>	3
<p>Communicate the role of retail as a civic use to potential retailers and their ability to foster community gatherings through architectural interventions and programming.</p>	3

Property Owners

RECOMMENDATION	PRIORITY LEVEL (1-3)
<p>Address issues related to speculative and absentee property owners on a citywide scale, but specifically for the purposes of remediating widespread difficulties related to disinvestment and abandonment in each commercial corridor.</p>	1
<p>Conduct a retail lease research project to determine appropriate rent ranges by corridor, targeting the Retail Priority Blocks. Upon completion of research, conduct a marketing campaign to educate property owners, and consider weighting the Motor City Match scoring to benefit landlords who lease their properties within this range.</p>	1
<p>Undertake a campaign to clearly educate property owners regarding resources available through public and private sources. This educational campaign should also explain the broader implications of participating in these programs (e.g., shared costs, reimbursements, securing tenants, etc.). This campaign should include a printed and digital resource guide similar to BizGrid that is paired with in-person outreach to property owners in targeted areas throughout the city.</p>	1
<p>Consider City or non-profit property ownership as a medium to maintain local business mix long-term. Similar to retailer property ownership, this strategy provides an opportunity to control building condition and lease rates. Appropriate property owners would be Invest Detroit, the City's Land Bank, or the Detroit Economic Growth Corporation (DEGC).</p>	2
<p>Encourage retail partnerships. Retailers are more commonly collocating within the same space to benefit from shared customer bases and lower overhead costs. A restaurant or other food-based business paired with any other category of retail has proven to be the most sustainable partnership opportunity, as food is the universal unifier. Examples of this might include a coffee and bike shop combination as seen at Filter & The Bike Rack in the in Washington, DC's Brookland neighborhood or Bottle and Barlow's a barbershop bar in Sacramento.</p>	2

Marketing

RECOMMENDATION	PRIORITY LEVEL (1-3)
Pursue a retail marketing strategy that targets potential tenants rather than customers. Identifying and recruiting appropriate tenants that meet the needs of the community is a critical step in developing a successful retail district. Working from the tenants' perspective – understanding their needs for success – will provide a more effective strategy for filling vacancies than focusing on what customers would prefer in their neighborhoods.	1

Safety

RECOMMENDATION	PRIORITY LEVEL (1-3)
Address safety concerns along each commercial corridor to promote economic activity. Criminal activity and vibrant retail districts do not coexist.	1
Promote the Project Green Light Detroit program to all gas stations, restaurants, and convenience stores in each commercial corridor. Also expand the program across the length of each Retail Priority Block(s) for each neighborhood. Consider what indicators are needed to discontinue lights; although the flashing lights wan off criminals, they communicate a sense of unease to potential patrons along the corridor.	1
Board up and paint or poster blighted storefront windows and doors to communicate a sense of some investment along the Retail Priority Blocks. Philadelphia Horticulture Society's Philly Green program can serve as a best practice example. For this project, artist have painted awnings, flowerboxes, and people on plywood to resemble what the building could look like when occupied.	2



APPENDIX



METHODOLOGY

Step 1: Corridor identification

As the first step in completing the Neighborhood Retail Opportunity Study, the study areas and their respective commercial corridors were determined. Building upon the Mayor's initiative to create more walkable communities in targeted nodes, the Detroit Economic Growth Corporation (DEGC) outlined thirteen target neighborhoods for this study in the original request for proposals (RFP) to include:

- Banglatown
- East Warren
- Islandview – Greater Villages
- Jefferson – Chalmers
- Joy-Southfield
- Livernois – 6 Mile
- Northwest Grand River
- Osborn
- Rosa Parks – Clairmount
- Russell Woods
- West Vernor Corridor – Mexicantown
- West Vernor Corridor – Springwells
- West Warren



Each of these neighborhoods is home to on-going, yet varied revitalization efforts and targeted investments by governmental and non- and for-profit stakeholders. Additionally, each neighborhood has a unique retail typology, leading to commercial corridors ranging from a single block to a corridor measuring a couple of miles.

To delineate each corridor, Streetsense first combined target commercial corridors defined by the following reports and documents: *2016 Targeted Multifamily Housing Areas* (Detroit Planning & Development Department, 2015); *The Strategic Neighborhood Fund Microdistrict Strategy* (Invest Detroit, 2016); and, *ProsperUS Detroit Target Areas/Commercial Study Areas* (Michigan Community Resources, 2015). This information provided the baseline to assess corridors in greater detail.

The next step in delineating the corridor was to conduct a windshield survey of the corridor. During this survey, each corridor each corridor was extended or shortened based upon a contiguous/continuous retail expression. For example, in Southwest Detroit the West Vernor Corridor-Mexicantown was divided from West Vernor Corridor-Springwells since the viaduct creates a sever gap in the retail character (and trade areas) along Vernor Highway.

Finally, the Streetsense team coordinated with Detroit Planning & Development Department's project teams, who have on-going studies in five of the corridors (Islandview – Greater Villages, Northwest Grand River, Rosa Parks – Clairmount, and West Vernor Corridor's Mexicantown and Springwells). This coordination changed the boundaries of a few corridors, including expanding the scope for Islandview – Greater Villages to the entire neighborhood.

Before commencing the market analysis, DEGC approved each corridor's boundaries.

Step 2: Retail inventory analysis

The existing retail supply within each study area corridor was analyzed. An inventory was undertaken to record the address, store name and type, occupancy status, class of space, and estimated square footage of major retail-occupied and retail-appropriate space in each commercial corridor. Planned projects are not included in the inventory as full build-out cannot be guaranteed, and the inventory reflects current conditions only.

When conducting the supply assessment, several assumptions were made to accurately distribute retailers into the correct spending categories:

- The square feet for each Dollar and Discount Store was split between the Neighborhood Goods & Services (40% of total square feet) and General Merchandise, Apparel, Furnishings, & Other (60% of total square feet) categories. Retailers in this category include Dollar Tree, and Dollar General.
- The retail inventory for large-format retailers, such as Meijer, was equally distributed into the NG&S and GAFO categories.

Step 3: market competition analysis

A summary and assessment of the existing competition for customers in the Detroit market was undertaken. The competition analysis included a review of regional retail destinations. In addition, an analysis of how retail corridors are interacting was conducted to understand the retail conditions that impact each corridor/neighborhood (e.g. grocery stores, small retail centers, Downtown Detroit).

Step 4: Trade area identification

Boundaries for trade areas were then determined for primary, secondary, and, when necessary, tertiary levels of customer draws. Trade areas are impacted by competition, drive times, sociological and geographical boundaries, shopping patterns by customer type, pedestrian volumes, and other similar factors. This information provided a starting point for understanding the existing and potential customer base for Detroit's retail market.

A Primary Trade Area (PTA), Secondary Trade Area (STA) and, when appropriate, Tertiary Trade Area (TTA) were determined for each retail study area. The PTA identifies the segments from which the submarket's establishments draw a majority of their regular sales. The percentage of household expenditures captured by retailers is expected to be highest in its PTA. Convenience is a major factor for sales generated locally, especially for the Neighborhood Goods & Services category.

The STA represents the segments from which the second greatest amount of the retail sales are drawn. These sales are highly associated with the distance a customer will travel to visit Food & Beverage establishments.

Finally, the TTA contains the neighborhoods from which the retail study area will draw the least amount of retail sales. The distance traveled from the TTA is associated with the distance a customer will travel to a destination GAFO retailer or cluster of retail shops.

Step 5: Demographic analysis

Household population counts were calculated from the United States Postal Service index of active postal addresses (Q1 2017). The Detroit Economic Growth Corporation analyzed and provided the data to input into Streetsense's proprietary retail demand model.

Demand from the workplace population is considered only in the PTA for each study area. The International Council of Shopping Centers (ICSC) estimates that office workers with easy access to convenience retail and restaurants spend a varied amount annually based upon a neighborhood's typology—downtown, urban, suburban, or rural. For the commercial corridors in this report, the suburban typology was used, as the car-centric retail development patterns and associated customer behaviors in Detroit are closest to the definition of suburban retail.

Step 6: Retail demand calculation

Retail demand is measured by calculating the ability of each commercial corridor to attract existing expenditures by residents, employees, and visitors who might regularly patronize establishments under ideal or improved conditions.

Expenditures were determined from information gathered from the US Census Bureau, Esri, and Sitewise, as appropriate. These total estimated expenditures were multiplied by a capture rate to estimate total captured expenditures. Capture rates represent the ability of a study area corridor to draw customer expenditures within the context of the larger market. They are influenced by the amount, accessibility, and quality of existing and proposed retail development as well as market competition.

Total estimated and captured expenditures in each retail category were divided by expectations for sales per square foot by retail tenant type. The results of these calculations yield the total amount of demand for each study area within each retail category.

At the conclusion of the retail market analysis, the total

amount of retail demand in each commercial corridor and for each retail category was measured against the total amount of existing inventory of the same characteristics. The difference between these two figures is referred to as total unmet retail demand, or the total amount of retail development potential within each commercial corridor for each retail category.

Streetsense utilized the results of the unmet demand and the notes collected through field and desk research to create recommendations strategies appropriate for each commercial corridor and for the city as a collective.

ESTIMATING SALES PRODUCTIVITY

The demand range presented is calculated by dividing the total captured expenditures by a high and low sales figure. These figures are representative of expected sales per square foot for that retail category, according to actual retail sales nationwide and industry standards. The result of each calculation is a high- and low-productivity number.

Under the condition of “high productivity,” retail sales are high; thus a smaller amount of retail space is needed to capture consumer expenditures. This condition is often associated with better quality retail tenants, as it allows retailers to purchase higher quality inventory, hire more qualified employees, and invest in regular maintenance and improvements. At high productivity, although there are fewer retailers, they are operating at a high level of quality and efficiency.

“Low-productivity” conditions assign lower potential sales per square foot to each type of retail; therefore, a larger amount of retail space is supported but with significantly less profitability. This condition represents a much riskier retail environment, potentially characterized by high turnover

as a result of the inability to make profit and a sense of disinvestment home to unattractive or distressed storefronts due to the lack of resources to make improvements.

The irony is that low-productivity retail tenants are essential to market conditions where it is necessary to “prove the market.” High-productivity tenants are often highly selective in choosing a site, and may not accept the necessary level of risk associated with an up-and-coming commercial district. Because all of the commercial corridors in this report are rebounding from market difficulties, each was evaluated with a measured amount of start-up character. As a result, the high and low productivity sales figures for each study area were blended in ratios that reflect each corridor’s current state of evolution as a retail corridor. For several streets, the high to low productivity expectation was set at a 10/90 ratio, respectively, to provide the commercial corridor’s retail supply with “room to grow.” More established corridors were assigned 30/70 high to low sales productivity figures to account for their increased ability to sustain a higher amount of sales per square foot over the next several years.

RETAIL DEMAND SUMMARY (2017)

NEIGHBORHOOD	MODIFIED SUPPLY	MODIFIED DEMAND	BLENDED UNMET DEMAND
Banglatown			
NG&S	152,520	223,210	70,690
F&B	15,720	38,077	22,357
GAFO	19,575	45,836	26,261
Total	187,815	307,123	119,308
East Warren			
NG&S	38,010	144,598	106,588
F&B	15,510	28,027	12,517
GAFO	17,280	7,940	(9,340)
Total	70,800	180,565	109,765
Islandview / The Greater Villages			
NG&S	100,911	277,063	176,000
F&B	42,660	69,818	27,000
GAFO	19,794	34,528	15,000
Total	163,365	381,409	218,000
Jefferson Chalmers			
NG&S	25,890	175,050	149,160
F&B	9,570	25,297	15,727
GAFO	20,490	12,591	(7,899)
Total	55,950	212,938	156,988
Joy-Southfield			
NG&S	67,260	153,431	86,171
F&B	14,700	18,924	4,224
GAFO	7,260	9,098	1,838
Total	89,220	181,453	92,233
Livernois-6 Mile			
NG&S	203,790	519,971	316,181
F&B	54,720	85,058	30,338
GAFO	205,065	62,489	(142,576)
Total	460,755	667,518	206,763
Northwest Grand River			
NG&S	290,831	1,053,760	762,929
F&B	54,720	137,243	82,523
GAFO	61,406	115,815	54,409
Total	406,956	1,306,818	899,861
Osborn			
NG&S	37,545	338,064	300,519
F&B	16,485	48,430	31,945
GAFO	24,735	55,182	30,447
Total	78,765	441,676	362,911

RETAIL DEMAND SUMMARY (2017)

NEIGHBORHOOD	MODIFIED SUPPLY	MODIFIED DEMAND	BLENDED UNMET DEMAND
Rosa Parks			
NG&S	47,250	118,070	80,270
F&B	1,875	18,774	17,274
GAFO	0	9,924	9,924
Total	49,125	146,767	107,467
Russell Woods			
NG&S	57,968	206,916	148,948
F&B	12,600	23,170	10,570
GAFO	15,450	9,439	(6,011)
Total	86,018	239,524	153,506
West Vernor Corridor - Mexicantown			
NG&S	153,842	66,248	87,594
F&B	26,919	49,249	(22,330)
GAFO	24,854	55,136	(30,282)
Total	205,616	170,633	34,983
West Vernor Corridor - Springwells			
NG&S	106,275	463,193	356,918
F&B	57,450	86,187	28,737
GAFO	51,720	43,952	(7,768)
Total	215,445	593,332	377,887
West Warren			
NG&S	80,475	225,408	144,933
F&B	38,220	27,781	(10,439)
GAFO	37,410	16,972	(20,438)
Total	156,105	270,161	114,056

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$45,947,454	30.00%	\$13,784,236	\$216	63,786	\$534	25,818
Alcohol at Home	\$1,814,568	30.00%	\$544,370	\$328	1,660	\$414	1,315
Personal/Household Care Goods and Services	\$43,679,244	30.00%	\$13,103,773	\$260	50,438	\$716	18,296
Pet Food & Services	\$1,728,160	30.00%	\$518,448	\$187	2,774	\$303	1,710
NG&S SUBTOTAL			\$27,950,828		118,658		47,140
Full-Service	\$9,083,641	30.00%	\$2,725,092	\$312	8,744	\$669	4,071
Fast Food	\$9,850,512	35.00%	\$3,447,679	\$368	9,380	\$687	5,015
Alcohol Away from Home	\$1,112,503	30.00%	\$333,751	\$487	685	\$625	534
Snacks & Non-Alcoholic Beverages	\$1,522,941	30.00%	\$456,882	\$328	1,391	\$704	649
F&B SUBTOTAL			\$6,963,405		20,200		10,270
Home Furnishings	\$11,567,871	13.00%	\$1,503,823	\$188	7,984	\$335	4,494
Apparel	\$17,108,784	20.00%	\$3,421,757	\$222	15,427	\$566	6,043
Electronics	\$6,653,416	15.00%	\$998,012	\$794	1,257	\$958	1,042
Sports Equipment	\$1,944,180	11.00%	\$213,860	\$190	1,126	\$320	668
Books, Music & Other	\$918,085	13.00%	\$119,351	\$152	784	\$364	328
Pet Supplies	\$1,015,294	15.00%	\$152,294	\$187	815	\$303	502
Automotive Equipment	\$1,490,538	13.00%	\$193,770	\$177	1,094	\$252	769
GAFO SUBTOTAL			\$6,602,867		28,487		13,847
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$41,517,100		167,345		71,257

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$175,228,108	8.00%	\$14,018,249	\$216	64,869	\$534	26,256
Alcohol at Home	\$8,641,523	8.00%	\$691,322	\$328	2,108	\$414	1,670
Personal/Household Care Goods and Services	\$200,053,755	8.00%	\$16,004,300	\$260	61,602	\$716	22,346
Pet Food & Services	\$7,692,454	8.00%	\$615,396	\$187	3,293	\$303	2,030
NG&S SUBTOTAL			\$31,329,267		131,872		52,303
Full-Service	\$33,067,562	6.00%	\$1,984,054	\$312	6,366	\$669	2,964
Fast Food	\$41,958,840	6.00%	\$2,517,530	\$368	6,849	\$687	3,662
Alcohol Away from Home	\$6,193,924	6.00%	\$371,635	\$487	762	\$625	595
Snacks & Non-Alcoholic Beverages	\$4,995,100	6.00%	\$299,706	\$328	913	\$704	426
F&B SUBTOTAL			\$5,172,926		14,891		7,647
Home Furnishings	\$51,199,775	2.00%	\$1,023,996	\$188	5,437	\$335	3,060
Apparel	\$65,635,614	2.00%	\$1,312,712	\$222	5,918	\$566	2,318
Electronics	\$31,968,640	2.00%	\$639,373	\$794	805	\$958	667
Sports Equipment	\$7,093,042	2.00%	\$141,861	\$190	747	\$320	443
Books, Music & Other	\$4,845,247	2.00%	\$96,905	\$152	636	\$364	266
Pet Supplies	\$4,395,688	2.00%	\$87,914	\$187	470	\$303	290
Automotive Equipment	\$6,293,826	2.00%	\$125,877	\$177	711	\$252	500
GAFO SUBTOTAL			\$3,428,637		14,725		7,545
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$39,930,829		161,488		67,495

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - BANGLATOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$27,802,485	128,656	52,074
Alcohol at Home	\$1,235,692	3,767	2,985
Personal/Household Care Goods and Services	\$29,108,074	112,040	40,642
Pet Food & Services	\$1,133,844	6,067	3,741
NG&S SUBTOTAL	\$59,280,095	250,530	99,442
Full-Service	\$4,709,146	15,110	7,035
Fast Food	\$5,965,210	16,230	8,677
Alcohol Away from Home	\$705,386	1,447	1,129
Snacks & Non-Alcoholic Beverages	\$756,588	2,304	1,075
F&B SUBTOTAL	\$12,136,330	35,091	17,917
Home Furnishings	\$2,527,819	13,421	7,554
Apparel	\$4,734,469	21,346	8,362
Electronics	\$1,637,385	2,062	1,709
Sports Equipment	\$355,721	1,873	1,111
Books, Music & Other	\$216,256	1,420	595
Pet Supplies	\$240,208	1,285	793
Automotive Equipment	\$319,646	1,805	1,269
GAFO SUBTOTAL	\$10,031,504	43,212	21,392
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$81,447,929	328,833	138,752

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$3,734,478	35.00%	\$1,307,067	\$216	6,048	\$534	2,448
Alcohol at Home	\$141,476	30.00%	\$42,443	\$328	129	\$414	103
Personal/Household Care Goods and Services	\$6,471,511	30.00%	\$1,941,453	\$260	7,473	\$716	2,711
NG&S SUBTOTAL	\$10,347,465		\$3,290,964		13,651		5,261
Full-Service	\$1,628,570	40.00%	\$651,428	\$312	2,090	\$669	973
Fast Food	\$1,734,421	35.00%	\$607,047	\$368	1,652	\$687	883
F&B SUBTOTAL	\$3,362,991		\$1,258,475		3742		1856
Home Furnishings	\$353,691	10.00%	\$35,369	\$188	188	\$335	106
Apparel	\$5,603,749	10.00%	\$560,375	\$222	2,526	\$566	990
Electronics	\$1,389,301	10.00%	\$138,930	\$794	175	\$958	145
Sports Equipment	\$1,060,848	10.00%	\$106,085	\$190	559	\$320	331
Books, Music & Other	\$1,248,422	10.00%	\$124,842	\$152	820	\$364	343
GAFO SUBTOTAL	\$9,656,011		\$965,601		4,268		1,915
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$5,515,040		21,660		9,033

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,606,897	35.00%	\$562,414	\$216	2,603	\$534	1,053
Alcohol at Home	\$26,514	33.00%	\$8,750	\$328	27	\$414	21
Personal/Household Care Goods and Services	\$1,967,856	30.00%	\$590,357	\$260	2,272	\$716	824
NG&S SUBTOTAL	\$3,601,267		\$1,161,520		4,902		1,899
Full-Service	\$738,323	45.00%	\$332,245	\$312	1,066	\$669	496
Fast Food	\$962,217	40.00%	\$384,887	\$368	1,047	\$687	560
F&B SUBTOTAL	\$1,700,540		\$717,132		2113		1056
Home Furnishings	\$66,285	4.00%	\$2,651	\$188	14	\$335	8
Apparel	\$2,011,461	4.00%	\$80,458	\$222	363	\$566	142
Electronics	\$308,142	4.00%	\$12,326	\$794	16	\$958	13
Sports Equipment	\$192,115	4.00%	\$7,685	\$190	40	\$320	24
Books, Music & Other	\$453,998	4.00%	\$18,160	\$152	119	\$364	50
GAFO SUBTOTAL	\$3,032,001		\$121,280		552		237
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,999,933		7,567		3,192

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,766,588	30.00%	\$529,976	\$216	2,452	\$534	993
Alcohol at Home	\$58,851	30.00%	\$17,655	\$328	54	\$414	43
Personal/Household Care Goods and Services	\$822,228	30.00%	\$246,668	\$260	949	\$716	344
NG&S SUBTOTAL	\$2,647,667		\$794,300		3,456		1,380
Full-Service	\$531,918	35.00%	\$186,171	\$312	597	\$669	278
Fast Food	\$603,585	35.00%	\$211,255	\$368	575	\$687	307
F&B SUBTOTAL	\$1,135,503		\$397,426		1172		585
Home Furnishings	\$147,128	2.00%	\$2,943	\$188	16	\$335	9
Apparel	\$1,300,230	2.00%	\$26,005	\$222	117	\$566	46
Electronics	\$153,198	2.00%	\$3,064	\$794	4	\$958	3
Sports Equipment	\$56,917	2.00%	\$1,138	\$190	6	\$320	4
Books, Music & Other	\$255,196	2.00%	\$5,104	\$152	34	\$364	14
GAFO SUBTOTAL	\$1,912,668		\$38,253		176		76
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,229,979		4,804		2,041

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - BANGLATOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$2,399,458	11,103	4,494
Alcohol at Home	\$68,848	210	166
Personal/Household Care Goods and Services	\$2,778,479	10,695	3,879
NG&S SUBTOTAL	\$5,246,784	22,008	8,540
Full-Service	\$1,169,844	3,754	1,748
Fast Food	\$1,203,189	3,274	1,750
F&B SUBTOTAL	\$2,373,033	7,027	3,498
Home Furnishings	\$40,963	217	122
Apparel	\$666,838	3,006	1,178
Electronics	\$154,320	194	161
Sports Equipment	\$114,908	605	359
Books, Music & Other	\$148,106	972	407
GAFO SUBTOTAL	\$1,125,134	4,996	2,227
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$8,744,952	34,031	14,265

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

VISITOR-BASED RETAIL DEMAND (2017) - BANGLATOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
NG&S	\$35,132	35.00%	\$12,296	\$268	46	\$555	22
F&B	\$170,693	22.00%	\$37,553	\$340	111	\$678	55
GAFO	\$231,553	12.00%	\$27,786	\$309	90	\$509	55
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$77,635		246		132

Source: Streetsense, STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - BANGLATOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$30,201,943	139,759	56,569
Alcohol at Home	\$1,304,540	3,977	3,151
Personal/Household Care Goods and Services	\$31,886,552	122,735	44,522
Pet Food & Services	\$1,133,844	6,067	3,741
NG&S SUBTOTAL	\$64,539,175	272,584	108,004
Full-Service	\$5,878,990	18,864	8,783
Fast Food	\$7,168,399	19,503	10,428
Alcohol Away from Home	\$705,386	1,447	1,129
Snacks & Non-Alcoholic Beverages	\$756,588	2,304	1,075
F&B SUBTOTAL	\$14,546,916	42,229	21,471
Home Furnishings	\$2,568,782	13,638	7,676
Apparel	\$5,401,307	24,352	9,540
Electronics	\$1,791,705	2,256	1,870
Sports Equipment	\$470,628	2,478	1,470
Books, Music & Other	\$364,362	2,392	1,002
Pet Supplies	\$240,208	1,285	793
Automotive Equipment	\$319,646	1,805	1,269
GAFO SUBTOTAL	\$11,184,425	48,298	23,674
TOTAL GENERATED RETAIL DEMAND:	\$90,270,516	363,111	153,149

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)
 Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed.

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - EAST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$33,014,590	30.00%	\$9,904,377	\$216	45,832	\$534	18,551
Alcohol at Home	\$1,577,345	35.00%	\$552,071	\$328	1,683	\$414	1,334
Personal/Household Care Goods and Services	\$37,670,710	40.00%	\$15,068,284	\$260	58,000	\$716	21,039
Pet Food & Services	\$1,476,125	35.00%	\$516,644	\$187	2,764	\$303	1,705
NG&S SUBTOTAL			\$26,041,376		108,279		42,628
Full-Service	\$6,216,595	25.00%	\$1,554,149	\$312	4,987	\$669	2,322
Fast Food	\$7,633,675	22.00%	\$1,679,409	\$368	4,569	\$687	2,443
Alcohol Away from Home	\$1,121,855	22.00%	\$246,808	\$487	506	\$625	395
Snacks & Non-Alcoholic Beverages	\$961,590	22.00%	\$211,550	\$328	644	\$704	301
F&B SUBTOTAL			\$3,691,915		10,707		5,461
Home Furnishings	\$10,923,325	2.50%	\$273,083	\$188	1,450	\$335	816
Apparel	\$13,580,350	2.00%	\$271,607	\$222	1,225	\$566	480
Electronics	\$5,583,970	2.50%	\$139,599	\$794	176	\$958	146
Sports Equipment	\$1,611,085	2.50%	\$40,277	\$190	212	\$320	126
Books, Music & Other	\$809,760	2.50%	\$20,244	\$152	133	\$364	56
Pet Supplies	\$851,935	2.50%	\$21,298	\$187	114	\$303	70
Automotive Equipment	\$1,307,425	2.00%	\$26,149	\$177	148	\$252	104
GAFO SUBTOTAL			\$792,257		3,457		1,797
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$30,525,548		122,443		49,886

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - EAST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$21,893,346	15.00%	\$3,284,002	\$216	15,197	\$534	6,151
Alcohol at Home	\$1,157,308	15.00%	\$173,596	\$328	529	\$414	419
Personal/Household Care Goods and Services	\$26,292,240	15.00%	\$3,943,836	\$260	15,180	\$716	5,507
Pet Food & Services	\$1,016,858	10.00%	\$101,686	\$187	544	\$303	335
NG&S SUBTOTAL			\$7,503,120		31,450		12,412
Full-Service	\$4,831,480	8.00%	\$386,518	\$312	1,240	\$669	577
Fast Food	\$5,039,346	8.00%	\$403,148	\$368	1,097	\$687	586
Alcohol Away from Home	\$814,610	8.00%	\$65,169	\$487	134	\$625	104
Snacks & Non-Alcoholic Beverages	\$674,160	8.00%	\$53,933	\$328	164	\$704	77
F&B SUBTOTAL			\$908,768		2,635		1,345
Home Furnishings	\$7,679,806	1.50%	\$115,197	\$188	612	\$335	344
Apparel	\$8,831,496	1.00%	\$88,315	\$222	398	\$566	156
Electronics	\$3,803,386	1.50%	\$57,051	\$794	72	\$958	60
Sports Equipment	\$1,101,128	1.50%	\$16,517	\$190	87	\$320	52
Books, Music & Other	\$651,688	1.50%	\$9,775	\$152	64	\$364	27
Pet Supplies	\$578,654	1.50%	\$8,680	\$187	46	\$303	29
Automotive Equipment	\$887,644	1.00%	\$8,876	\$177	50	\$252	35
GAFO SUBTOTAL			\$304,411		1,329		702
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$8,716,299		35,415		14,459

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - EAST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$13,188,379	61,029	24,702
Alcohol at Home	\$725,667	2,212	1,753
Personal/Household Care Goods and Services	\$19,012,120	73,180	26,546
Pet Food & Services	\$618,330	3,308	2,040
NG&S SUBTOTAL	\$33,544,495	139,730	55,041
Full-Service	\$1,940,667	6,227	2,899
Fast Food	\$2,082,556	5,666	3,029
Alcohol Away from Home	\$311,977	640	499
Snacks & Non-Alcoholic Beverages	\$265,483	808	377
F&B SUBTOTAL	\$4,600,683	13,342	6,806
Home Furnishings	\$388,280	2,061	1,160
Apparel	\$359,922	1,623	636
Electronics	\$196,650	248	205
Sports Equipment	\$56,794	299	177
Books, Music & Other	\$30,019	197	83
Pet Supplies	\$29,978	160	99
Automotive Equipment	\$35,025	198	139
GAFO SUBTOTAL	\$1,096,669	4,786	2,499
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$39,241,847	157,858	64,345

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - EAST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$11,481,534	35.00%	\$4,018,537	\$216	18,596	\$534	7,527
Alcohol at Home	\$434,964	35.00%	\$152,237	\$328	464	\$414	368
Personal/Household Care Goods and Services	\$19,896,455	35.00%	\$6,963,759	\$260	26,804	\$716	9,723
NG&S SUBTOTAL	\$31,812,952		\$11,134,533		45,864		17,618
Full-Service	\$5,006,986	40.00%	\$2,002,794	\$312	6,426	\$669	2,992
Fast Food	\$5,332,423	45.00%	\$2,399,590	\$368	6,529	\$687	3,491
F&B SUBTOTAL	\$10,339,409		\$4,402,385		12,955		6,483
Home Furnishings	\$1,087,411	3.00%	\$32,622	\$188	173	\$335	97
Apparel	\$17,228,548	2.00%	\$344,571	\$222	1,554	\$566	609
Electronics	\$4,271,362	3.00%	\$128,141	\$794	161	\$958	134
Sports Equipment	\$3,261,544	3.00%	\$97,846	\$190	515	\$320	306
Books, Music & Other	\$3,838,232	3.00%	\$115,147	\$152	756	\$364	317
GAFO SUBTOTAL	\$29,687,097		\$718,327		3,159		1,462
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$16,255,245		61,979		25,562

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - EAST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,285,186	35.00%	\$449,815	\$216	2,082	\$534	843
Alcohol at Home	\$21,206	35.00%	\$7,422	\$328	23	\$414	18
Personal/Household Care Goods and Services	\$1,573,879	35.00%	\$550,858	\$260	2,120	\$716	769
NG&S SUBTOTAL	\$2,880,271		\$1,008,095		4,224		1,630
Full-Service	\$2,269,951	45.00%	\$1,021,478	\$312	3,278	\$669	1,526
Fast Food	\$769,575	50.00%	\$384,788	\$368	1,047	\$687	560
F&B SUBTOTAL	\$3,039,526		\$1,406,265		4325		2086
Home Furnishings	\$53,014	1.50%	\$795	\$188	4	\$335	2
Apparel	\$1,608,754	1.50%	\$24,131	\$222	109	\$566	43
Electronics	\$246,450	1.50%	\$3,697	\$794	5	\$958	4
Sports Equipment	\$153,652	1.50%	\$2,305	\$190	12	\$320	7
Books, Music & Other	\$363,104	1.50%	\$5,447	\$152	36	\$364	15
GAFO SUBTOTAL	\$2,424,975		\$36,375		166		71
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$2,450,735		8,715		3,786

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - EAST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$667,676	30.00%	\$200,303	\$216	927	\$534	375
Alcohol at Home	\$22,243	30.00%	\$6,673	\$328	20	\$414	16
Personal/Household Care Goods and Services	\$310,758	30.00%	\$93,227	\$260	359	\$716	130
NG&S SUBTOTAL	\$1,000,677		\$300,203		1,306		521
Full-Service	\$201,037	40.00%	\$80,415	\$312	258	\$669	120
Fast Food	\$228,123	40.00%	\$91,249	\$368	248	\$687	133
F&B SUBTOTAL	\$429,160		\$171,664		506		253
Home Furnishings	\$55,606	1.00%	\$556	\$188	3	\$335	2
Apparel	\$491,418	1.00%	\$4,914	\$222	22	\$566	9
Electronics	\$57,901	1.00%	\$579	\$794	1	\$958	1
Sports Equipment	\$21,511	1.00%	\$215	\$190	1	\$320	1
Books, Music & Other	\$96,450	1.00%	\$965	\$152	6	\$364	3
GAFO SUBTOTAL	\$722,887		\$7,229		33		14
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$479,096		1,846		789

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - EAST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$4,668,655	21,604	8,744
Alcohol at Home	\$166,332	507	402
Personal/Household Care Goods and Services	\$7,607,844	29,283	10,623
NG&S SUBTOTAL	\$12,442,831	51,395	19,769
Full-Service	\$3,104,687	9,962	4,638
Fast Food	\$2,875,627	7,824	4,183
F&B SUBTOTAL	\$5,980,314	17,786	8,821
Home Furnishings	\$33,974	180	102
Apparel	\$373,616	1,684	660
Electronics	\$132,417	167	138
Sports Equipment	\$100,366	529	314
Books, Music & Other	\$121,558	798	334
GAFO SUBTOTAL	\$761,931	3,358	1,547
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$19,185,076	72,539	30,138

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - EAST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$17,857,034	82,633	33,446
Alcohol at Home	\$891,999	2,720	2,155
Personal/Household Care Goods and Services	\$26,619,964	102,463	37,168
Pet Food & Services	\$618,330	3,308	2,040
NG&S SUBTOTAL	\$45,987,327	191,124	74,809
Full-Service	\$5,045,354	16,189	7,538
Fast Food	\$4,958,183	13,490	7,212
Alcohol Away from Home	\$311,977	640	499
Snacks & Non-Alcoholic Beverages	\$265,483	808	377
F&B SUBTOTAL	\$10,580,996	31,127	15,627
Home Furnishings	\$422,254	2,242	1,262
Apparel	\$733,538	3,307	1,296
Electronics	\$329,067	414	344
Sports Equipment	\$157,160	828	491
Books, Music & Other	\$151,577	995	417
Pet Supplies	\$29,978	160	99
Automotive Equipment	\$35,025	198	139
GAFO SUBTOTAL	\$1,858,600	8,145	4,047
TOTAL GENERATED RETAIL DEMAND:	\$58,426,923	230,396	94,483

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC).

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$55,531,772	28.00%	\$15,548,896	\$216	71,952	\$534	29,123
Alcohol at Home	\$2,682,526	30.00%	\$804,758	\$328	2,454	\$414	1,944
Personal/Household Care Goods and Services	\$71,400,481	32.00%	\$22,848,154	\$260	87,945	\$716	31,902
Pet Food & Services	\$2,682,526	28.00%	\$751,107	\$187	4,019	\$303	2,478
NG&S SUBTOTAL			\$39,952,915		166,370		65,447
Full-Service	\$9,789,478	40.00%	\$3,915,791	\$312	12,565	\$669	5,850
Fast Food	\$12,646,194	39.00%	\$4,932,016	\$368	13,419	\$687	7,174
Alcohol Away from Home	\$1,881,252	37.00%	\$696,063	\$487	1,428	\$625	1,114
Snacks & Non-Alcoholic Beverages	\$1,271,587	35.00%	\$445,055	\$328	1,355	\$704	633
F&B SUBTOTAL			\$9,988,926		28,767		14,771
Home Furnishings	\$17,070,620	8.00%	\$1,365,650	\$188	7,251	\$335	4,081
Apparel	\$19,648,632	12.00%	\$2,357,836	\$222	10,630	\$566	4,164
Electronics	\$10,503,657	4.00%	\$420,146	\$794	529	\$958	439
Sports Equipment	\$2,038,023	6.00%	\$122,281	\$190	644	\$320	382
Books, Music & Other	\$1,219,330	8.00%	\$97,546	\$152	640	\$364	268
Pet Supplies	\$1,463,196	12.00%	\$175,584	\$187	939	\$303	579
Automotive Equipment	\$1,811,576	8.00%	\$144,926	\$177	819	\$252	575
GAFO SUBTOTAL			\$4,683,969		21,453		10,488
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$54,625,810		216,589		90,707

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$49,969,800	10.00%	\$4,996,980	\$216	23,123	\$534	9,359
Alcohol at Home	\$2,738,700	10.00%	\$273,870	\$328	835	\$414	662
Personal/Household Care Goods and Services	\$63,342,000	10.00%	\$6,334,200	\$260	24,381	\$716	8,844
Pet Food & Services	\$2,371,500	8.00%	\$189,720	\$187	1,015	\$303	626
NG&S SUBTOTAL			\$11,794,770		49,355		19,491
Full-Service	\$10,679,400	15.00%	\$1,601,910	\$312	5,140	\$669	2,393
Fast Food	\$11,995,200	10.00%	\$1,199,520	\$368	3,264	\$687	1,745
Alcohol Away from Home	\$1,973,700	14.00%	\$276,318	\$487	567	\$625	442
Snacks & Non-Alcoholic Beverages	\$1,407,600	7.50%	\$105,570	\$328	321	\$704	150
F&B SUBTOTAL			\$3,183,318		9,292		4,731
Home Furnishings	\$16,065,000	1.00%	\$160,650	\$188	853	\$335	480
Apparel	\$18,849,600	2.00%	\$376,992	\$222	1,700	\$566	666
Electronics	\$9,608,400	0.50%	\$48,042	\$794	60	\$958	50
Sports Equipment	\$2,080,800	1.50%	\$31,212	\$190	164	\$320	98
Books, Music & Other	\$1,422,900	2.00%	\$28,458	\$152	187	\$364	78
Pet Supplies	\$1,300,500	2.00%	\$26,010	\$187	139	\$303	86
Automotive Equipment	\$1,836,000	1.75%	\$32,130	\$177	181	\$252	128
GAFO SUBTOTAL			\$703,494		3,285		1,585
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$15,681,582		61,932		25,807

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$107,230,536	2.50%	\$2,680,763	\$216	12,405	\$534	5,021
Alcohol at Home	\$5,917,800	2.50%	\$147,945	\$328	451	\$414	357
Personal/Household Care Goods and Services	\$121,995,447	2.50%	\$3,049,886	\$260	11,739	\$716	4,258
Pet Food & Services	\$4,734,240	2.00%	\$94,685	\$187	507	\$303	312
NG&S SUBTOTAL			\$5,973,279		25,102		9,949
Full-Service	\$23,464,077	8.00%	\$1,877,126	\$312	6,023	\$669	2,804
Fast Food	\$26,541,333	5.00%	\$1,327,067	\$368	3,611	\$687	1,930
Alcohol Away from Home	\$4,467,939	5.00%	\$223,397	\$487	458	\$625	358
Snacks & Non-Alcoholic Beverages	\$3,491,502	3.00%	\$104,745	\$328	319	\$704	149
F&B SUBTOTAL			\$3,532,335		10,411		5,241
Home Furnishings	\$32,547,900	0.50%	\$162,740	\$188	864	\$335	486
Apparel	\$43,111,173	0.50%	\$215,556	\$222	972	\$566	381
Electronics	\$19,942,986	0.25%	\$49,857	\$794	63	\$958	52
Sports Equipment	\$4,941,363	0.50%	\$24,707	\$190	130	\$320	77
Books, Music & Other	\$3,846,570	0.50%	\$19,233	\$152	126	\$364	53
Pet Supplies	\$2,722,188	0.60%	\$16,333	\$187	87	\$303	54
Automotive Equipment	\$3,964,926	0.50%	\$19,825	\$177	112	\$252	79
GAFO SUBTOTAL			\$508,250		2,354		1,182
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$10,013,864		37,868		16,372

Source:Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$23,226,640	107,481	43,504
Alcohol at Home	\$1,226,573	3,740	2,963
Personal/Household Care Goods and Services	\$32,232,240	124,066	45,005
Pet Food & Services	\$1,035,512	5,540	3,416
NG&S SUBTOTAL	\$57,720,965	240,827	94,887
Full-Service	\$7,394,827	23,728	11,048
Fast Food	\$7,458,602	20,293	10,850
Alcohol Away from Home	\$1,195,778	2,453	1,914
Snacks & Non-Alcoholic Beverages	\$655,371	1,996	931
F&B SUBTOTAL	\$16,704,578	48,470	24,743
Home Furnishings	\$1,689,039	8,968	5,047
Apparel	\$2,950,384	13,302	5,211
Electronics	\$518,046	652	541
Sports Equipment	\$178,200	938	557
Books, Music & Other	\$145,237	954	399
Pet Supplies	\$217,927	1,166	719
Automotive Equipment	\$196,881	1,112	781
GAFO SUBTOTAL	\$5,895,713	27,092	13,255
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$80,321,256	316,388	132,886

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$14,431,806	30.00%	\$4,329,542	\$216	20,035	\$534	8,109
Alcohol at Home	\$546,732	30.00%	\$164,020	\$328	500	\$414	396
Personal/Household Care Goods and Services	\$25,009,008	30.00%	\$7,502,702	\$260	28,879	\$716	10,476
NG&S SUBTOTAL	\$39,987,546		\$11,996,264		49,414		18,981
Full-Service	\$6,293,571	40.00%	\$2,517,428	\$312	8,078	\$669	3,761
Fast Food	\$6,702,632	45.00%	\$3,016,184	\$368	8,206	\$687	4,387
F&B SUBTOTAL	\$12,996,203		\$5,533,613		16284		8149
Home Furnishings	\$1,366,830	5.00%	\$68,341	\$188	363	\$335	204
Apparel	\$21,655,562	5.00%	\$1,082,778	\$222	4,882	\$566	1,912
Electronics	\$5,368,923	5.00%	\$268,446	\$794	338	\$958	280
Sports Equipment	\$4,099,624	5.00%	\$204,981	\$190	1,079	\$320	640
Books, Music & Other	\$4,824,497	5.00%	\$241,225	\$152	1,584	\$364	663
GAFO SUBTOTAL	\$37,315,435		\$1,865,772		8,246		3,700
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$19,395,648		73,944		30,830

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$2,360,596	40.00%	\$944,238	\$216	4,369	\$534	1,769
Alcohol at Home	\$38,950	40.00%	\$15,580	\$328	48	\$414	38
Personal/Household Care Goods and Services	\$2,890,860	40.00%	\$1,156,344	\$260	4,451	\$716	1,615
NG&S SUBTOTAL	\$5,290,407		\$2,116,163		8,868		3,421
Full-Service	\$2,853,233	48.00%	\$1,369,552	\$312	4,395	\$669	2,046
Fast Food	\$1,413,536	52.00%	\$735,038	\$368	2,000	\$687	1,069
F&B SUBTOTAL	\$4,266,768		\$2,104,590		6394		3115
Home Furnishings	\$97,376	5.00%	\$4,869	\$188	26	\$335	15
Apparel	\$2,954,918	5.00%	\$147,746	\$222	666	\$566	261
Electronics	\$452,673	5.00%	\$22,634	\$794	29	\$958	24
Sports Equipment	\$282,224	5.00%	\$14,111	\$190	74	\$320	44
Books, Music & Other	\$666,941	5.00%	\$33,347	\$152	219	\$364	92
GAFO SUBTOTAL	\$4,454,132		\$222,707		1,014		435
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$4,443,459		16,276		6,971

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$8,913,546	28.00%	\$2,495,793	\$216	11,549	\$534	4,675
Alcohol at Home	\$296,940	28.00%	\$83,143	\$328	253	\$414	201
Personal/Household Care Goods and Services	\$4,148,654	28.00%	\$1,161,623	\$260	4,471	\$716	1,622
NG&S SUBTOTAL	\$13,359,140		\$3,740,559		16,274		6,497
Full-Service	\$2,683,858	35.00%	\$939,350	\$312	3,014	\$669	1,403
Fast Food	\$3,045,465	40.00%	\$1,218,186	\$368	3,314	\$687	1,772
F&B SUBTOTAL	\$5,729,323		\$2,157,536		6328		3175
Home Furnishings	\$742,351	5.00%	\$37,118	\$188	197	\$335	111
Apparel	\$6,560,476	5.00%	\$328,024	\$222	1,479	\$566	579
Electronics	\$772,978	5.00%	\$38,649	\$794	49	\$958	40
Sports Equipment	\$287,180	5.00%	\$14,359	\$190	76	\$320	45
Books, Music & Other	\$1,287,623	5.00%	\$64,381	\$152	423	\$364	177
GAFO SUBTOTAL	\$9,650,608		\$482,530		2,223		952
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$6,380,626		24,825		10,625

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$7,769,573	35,954	14,552
Alcohol at Home	\$262,743	801	635
Personal/Household Care Goods and Services	\$9,820,670	37,801	13,712
NG&S SUBTOTAL	\$17,852,986	74,556	28,899
Full-Service	\$4,826,330	15,486	7,210
Fast Food	\$4,969,409	13,520	7,229
F&B SUBTOTAL	\$9,795,739	29,007	14,439
Home Furnishings	\$110,328	586	330
Apparel	\$1,558,548	7,027	2,753
Electronics	\$329,729	415	344
Sports Equipment	\$233,451	1,229	729
Books, Music & Other	\$338,953	2,226	932
GAFO SUBTOTAL	\$2,571,009	11,483	5,088
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$30,219,733	115,045	48,426

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - ISLANDVIEW/THE VILLAGES

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$30,996,213	143,435	58,056
Alcohol at Home	\$1,489,316	4,541	3,597
Personal/Household Care Goods and Services	\$42,052,910	161,866	58,717
Pet Food & Services	\$1,035,512	5,540	3,416
NG&S SUBTOTAL	\$75,573,950	315,382	123,787
Full-Service	\$12,221,157	39,214	18,258
Fast Food	\$12,428,011	33,813	18,078
Alcohol Away from Home	\$1,195,778	2,453	1,914
Snacks & Non-Alcoholic Beverages	\$655,371	1,996	931
F&B SUBTOTAL	\$26,500,317	77,477	39,183
Home Furnishings	\$1,799,367	9,553	5,377
Apparel	\$4,508,932	20,329	7,963
Electronics	\$847,774	1,068	885
Sports Equipment	\$411,652	2,168	1,286
Books, Music & Other	\$484,190	3,179	1,331
Pet Supplies	\$217,927	1,166	719
Automotive Equipment	\$196,881	1,112	781
GAFO SUBTOTAL	\$8,466,722	38,575	18,343
TOTAL GENERATED RETAIL DEMAND:	\$110,540,989	431,433	181,312

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC)

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$30,228,336	30.00%	\$9,068,501	\$216	41,964	\$534	16,985
Alcohol at Home	\$1,870,416	35.00%	\$654,646	\$328	1,996	\$414	1,581
Personal/Household Care Goods and Services	\$38,222,856	45.00%	\$17,200,285	\$260	66,206	\$716	24,016
Pet Food & Services	\$1,531,026	35.00%	\$535,859	\$187	2,867	\$303	1,768
NG&S SUBTOTAL			\$27,459,291		113,033		44,351
Full-Service	\$8,198,154	25.00%	\$2,049,539	\$312	6,576	\$669	3,062
Fast Food	\$6,893,388	25.00%	\$1,723,347	\$368	4,689	\$687	2,507
Alcohol Away from Home	\$1,334,934	25.00%	\$333,734	\$487	685	\$625	534
Snacks & Non-Alcoholic Beverages	\$1,040,796	25.00%	\$260,199	\$328	792	\$704	370
F&B SUBTOTAL			\$4,366,818		12,742		6,473
Home Furnishings	\$11,531,718	3.00%	\$345,952	\$188	1,837	\$335	1,034
Apparel	\$12,685,644	3.00%	\$380,569	\$222	1,716	\$566	672
Electronics	\$5,369,904	3.00%	\$161,097	\$794	203	\$958	168
Sports Equipment	\$1,659,240	3.00%	\$49,777	\$190	262	\$320	156
Books, Music & Other	\$1,176,552	3.00%	\$35,297	\$152	232	\$364	97
Pet Supplies	\$859,788	4.00%	\$34,392	\$187	184	\$303	113
Automotive Equipment	\$1,282,140	2.00%	\$25,643	\$177	145	\$252	102
GAFO SUBTOTAL			\$1,032,726		4,578		2,342
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$32,858,835		130,354		53,165

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$18,500,315	15.00%	\$2,775,047	\$216	12,841	\$534	5,198
Alcohol at Home	\$1,113,816	15.00%	\$167,072	\$328	509	\$414	404
Personal/Household Care Goods and Services	\$22,909,170	15.00%	\$3,436,376	\$260	13,227	\$716	4,798
Pet Food & Services	\$915,523	10.00%	\$91,552	\$187	490	\$303	302
NG&S SUBTOTAL			\$6,470,047		27,068		10,701
Full-Service	\$4,839,193	12.00%	\$580,703	\$312	1,863	\$669	868
Fast Food	\$4,109,306	12.00%	\$493,117	\$368	1,342	\$687	717
Alcohol Away from Home	\$793,172	12.00%	\$95,181	\$487	195	\$625	152
Snacks & Non-Alcoholic Beverages	\$628,631	12.00%	\$75,436	\$328	230	\$704	107
F&B SUBTOTAL			\$1,244,436		3,630		1,844
Home Furnishings	\$7,341,060	2.00%	\$146,821	\$188	780	\$335	439
Apparel	\$8,172,203	2.00%	\$163,444	\$222	737	\$566	289
Electronics	\$3,147,374	2.00%	\$62,947	\$794	79	\$958	66
Sports Equipment	\$1,105,378	2.00%	\$22,108	\$190	116	\$320	69
Books, Music & Other	\$738,325	2.00%	\$14,767	\$152	97	\$364	41
Pet Supplies	\$514,718	1.00%	\$5,147	\$187	28	\$303	17
Automotive Equipment	\$780,515	1.00%	\$7,805	\$177	44	\$252	31
GAFO SUBTOTAL			\$423,039		1,881		951
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$8,137,523		32,578		13,497

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$56,142,416	5.00%	\$2,807,121	\$216	12,990	\$534	5,258
Alcohol at Home	\$3,040,928	5.00%	\$152,046	\$328	464	\$414	367
Personal/Household Care Goods and Services	\$67,746,712	5.00%	\$3,387,336	\$260	13,038	\$716	4,730
Pet Food & Services	\$2,639,296	2.00%	\$52,786	\$187	282	\$303	174
NG&S SUBTOTAL			\$6,399,289		26,774		10,529
Full-Service	\$12,551,000	5.00%	\$627,550	\$312	2,014	\$669	938
Fast Food	\$12,751,816	3.00%	\$382,554	\$368	1,041	\$687	556
Alcohol Away from Home	\$2,151,600	3.00%	\$64,548	\$487	132	\$625	103
Snacks & Non-Alcoholic Beverages	\$1,721,280	3.00%	\$51,638	\$328	157	\$704	73
F&B SUBTOTAL			\$1,126,291		3,344		1,671
Home Furnishings	\$19,866,440	0.50%	\$99,332	\$188	527	\$335	297
Apparel	\$23,294,656	0.50%	\$116,473	\$222	525	\$566	206
Electronics	\$9,682,200	1.00%	\$96,822	\$794	122	\$958	101
Sports Equipment	\$2,897,488	1.00%	\$28,975	\$190	153	\$320	91
Books, Music & Other	\$1,807,344	1.00%	\$18,073	\$152	119	\$364	50
Pet Supplies	\$1,477,432	0.50%	\$7,387	\$187	40	\$303	24
Automotive Equipment	\$2,180,288	0.50%	\$10,901	\$177	62	\$252	43
GAFO SUBTOTAL			\$377,964		1,547		811
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$7,903,544		31,665		13,011

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - JEFFERSON CHALMERS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$14,650,669	67,796	27,441
Alcohol at Home	\$973,764	2,969	2,352
Personal/Household Care Goods and Services	\$24,023,996	92,471	33,544
Pet Food & Services	\$680,197	3,639	2,244
NG&S SUBTOTAL	\$40,328,627	166,875	65,581
Full-Service	\$3,257,792	10,453	4,867
Fast Food	\$2,599,018	7,071	3,781
Alcohol Away from Home	\$493,462	1,012	790
Snacks & Non-Alcoholic Beverages	\$387,273	1,179	550
F&B SUBTOTAL	\$6,737,545	19,716	9,988
Home Furnishings	\$592,105	3,144	1,769
Apparel	\$660,487	2,978	1,167
Electronics	\$320,867	404	335
Sports Equipment	\$100,860	531	315
Books, Music & Other	\$68,137	447	187
Pet Supplies	\$46,926	251	155
Automotive Equipment	\$44,349	250	176
GAFO SUBTOTAL	\$1,833,730	8,006	4,104
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$48,899,902	194,597	79,673

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$2,862,179	50.00%	\$1,431,089	\$216	6,622	\$534	2,680
Alcohol at Home	\$108,430	50.00%	\$54,215	\$328	165	\$414	131
Personal/Household Care Goods and Services	\$4,959,895	50.00%	\$2,479,948	\$260	9,546	\$716	3,463
NG&S SUBTOTAL	\$7,930,504		\$3,965,252		16,333		6,274
Full-Service	\$1,248,168	45.00%	\$561,676	\$312	1,802	\$669	839
Fast Food	\$1,329,295	45.00%	\$598,183	\$368	1,627	\$687	870
F&B SUBTOTAL	\$2,577,464		\$1,159,859		3,430		1,709
Home Furnishings	\$271,076	10.00%	\$27,108	\$188	144	\$335	81
Apparel	\$4,294,825	10.00%	\$429,483	\$222	1,936	\$566	759
Electronics	\$1,064,788	10.00%	\$106,479	\$794	134	\$958	111
Sports Equipment	\$813,055	10.00%	\$81,306	\$190	428	\$320	254
Books, Music & Other	\$956,815	10.00%	\$95,682	\$152	628	\$364	263
GAFO SUBTOTAL	\$7,400,560		\$740,056		3,271		1,468
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$5,865,167		23,034		9,451

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,352,347	55.00%	\$743,791	\$216	3,442	\$534	1,393
Alcohol at Home	\$22,314	50.00%	\$11,157	\$328	34	\$414	27
Personal/Household Care Goods and Services	\$1,656,127	60.00%	\$993,676	\$260	3,825	\$716	1,387
NG&S SUBTOTAL	\$3,030,788		\$1,748,624		7,301		2,808
Full-Service	\$565,866	50.00%	\$282,933	\$312	908	\$669	423
Fast Food	\$809,792	60.00%	\$485,875	\$368	1,322	\$687	707
F&B SUBTOTAL	\$1,375,657		\$768,808		2,230		1,129
Home Furnishings	\$55,785	10.00%	\$5,578	\$188	30	\$335	17
Apparel	\$1,692,824	10.00%	\$169,282	\$222	763	\$566	299
Electronics	\$259,329	10.00%	\$25,933	\$794	33	\$958	27
Sports Equipment	\$161,682	10.00%	\$16,168	\$190	85	\$320	51
Books, Music & Other	\$382,079	10.00%	\$38,208	\$152	251	\$364	105
GAFO SUBTOTAL	\$2,551,700		\$255,170		1,162		498
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$2,772,602		10,692		4,435

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - JEFFERSON CHALMERS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$3,359,876	40.00%	\$1,343,950	\$216	6,219	\$534	2,517
Alcohol at Home	\$111,929	40.00%	\$44,772	\$328	136	\$414	108
Personal/Household Care Goods and Services	\$1,563,796	40.00%	\$625,518	\$260	2,408	\$716	873
NG&S SUBTOTAL	\$5,035,600		\$2,014,240		8,763		3,499
Full-Service	\$1,011,655	35.00%	\$354,079	\$312	1,136	\$669	529
Fast Food	\$1,147,959	50.00%	\$573,980	\$368	1,562	\$687	835
F&B SUBTOTAL	\$2,159,614		\$928,059		2698		1364
Home Furnishings	\$279,822	5.00%	\$13,991	\$188	74	\$335	42
Apparel	\$2,472,909	5.00%	\$123,645	\$222	557	\$566	218
Electronics	\$291,367	5.00%	\$14,568	\$794	18	\$958	15
Sports Equipment	\$108,250	5.00%	\$5,412	\$190	29	\$320	17
Books, Music & Other	\$485,357	5.00%	\$24,268	\$152	159	\$364	67
GAFO SUBTOTAL	\$3,637,705		\$181,885		838		359
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$3,124,184		12,299		5,222

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - JEFFERSON CHALMERS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$3,518,831	16,283	6,591
Alcohol at Home	\$110,144	336	266
Personal/Household Care Goods and Services	\$4,099,142	15,778	5,723
NG&S SUBTOTAL	\$7,728,116	32,397	12,580
Full-Service	\$1,198,688	3,846	1,791
Fast Food	\$1,658,037	4,511	2,412
F&B SUBTOTAL	\$2,856,725	8,357	4,203
Home Furnishings	\$46,677	248	139
Apparel	\$722,410	3,257	1,276
Electronics	\$146,980	185	153
Sports Equipment	\$102,886	542	321
Books, Music & Other	\$158,157	1,038	435
GAFO SUBTOTAL	\$1,177,111	5,270	2,325
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$11,761,952	46,025	19,108

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - JEFFERSON CHALMERS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$18,169,500	84,079	34,032
Alcohol at Home	\$1,083,908	3,305	2,618
Personal/Household Care Goods and Services	\$28,123,138	108,249	39,267
Pet Food & Services	\$680,197	3,639	2,244
NG&S SUBTOTAL	\$48,056,743	199,272	78,161
Full-Service	\$4,456,479	14,300	6,658
Fast Food	\$4,257,055	11,582	6,193
Alcohol Away from Home	\$493,462	1,012	790
Snacks & Non-Alcoholic Beverages	\$387,273	1,179	550
F&B SUBTOTAL	\$9,594,270	28,074	14,191
Home Furnishings	\$638,782	3,391	1,909
Apparel	\$1,382,897	6,235	2,442
Electronics	\$467,847	589	488
Sports Equipment	\$203,746	1,073	637
Books, Music & Other	\$226,294	1,486	622
Pet Supplies	\$46,926	251	155
Automotive Equipment	\$44,349	250	176
GAFO SUBTOTAL	\$3,010,841	13,276	6,429
TOTAL GENERATED RETAIL DEMAND:	\$60,661,854	240,622	98,781

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC).

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - JOY-SOUTHFIELD

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$20,618,019	45.00%	\$9,278,109	\$216	42,934	\$534	17,378
Alcohol at Home	\$876,531	45.00%	\$394,439	\$328	1,203	\$414	953
Personal/Household Care Goods and Services	\$22,471,575	50.00%	\$11,235,788	\$260	43,248	\$716	15,688
Pet Food & Services	\$870,948	40.00%	\$348,379	\$187	1,864	\$303	1,149
NG&S SUBTOTAL			\$21,256,714		89,249		35,168
Full-Service	\$3,165,561	45.00%	\$1,424,502	\$312	4,571	\$669	2,128
Fast Food	\$4,779,048	50.00%	\$2,389,524	\$368	6,501	\$687	3,476
Alcohol Away from Home	\$597,381	40.00%	\$238,952	\$487	490	\$625	383
Snacks & Non-Alcoholic Beverages	\$535,968	35.00%	\$187,589	\$328	571	\$704	267
F&B SUBTOTAL			\$4,240,568		12,134		6,253
Home Furnishings	\$5,934,729	4.00%	\$237,389	\$188	1,260	\$335	709
Apparel	\$8,106,516	4.00%	\$324,261	\$222	1,462	\$566	573
Electronics	\$3,467,043	4.00%	\$138,682	\$794	175	\$958	145
Sports Equipment	\$865,365	4.00%	\$34,615	\$190	182	\$320	108
Books, Music & Other	\$379,644	4.00%	\$15,186	\$152	100	\$364	42
Pet Supplies	\$508,053	5.00%	\$25,403	\$187	136	\$303	84
Automotive Equipment	\$748,122	3.00%	\$22,444	\$177	127	\$252	89
GAFO SUBTOTAL			\$797,978		3,442		1,750
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$26,295,260		104,824		43,171

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - JOY-SOUTHFIELD

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$56,345,571	15.00%	\$8,451,836	\$216	39,111	\$534	15,830
Alcohol at Home	\$2,345,922	15.00%	\$351,888	\$328	1,073	\$414	850
Personal/Household Care Goods and Services	\$58,126,734	15.00%	\$8,719,010	\$260	33,560	\$716	12,174
Pet Food & Services	\$2,259,036	7.00%	\$158,133	\$187	846	\$303	522
NG&S SUBTOTAL			\$17,680,867		74,590		29,376
Full-Service	\$9,282,321	10.00%	\$928,232	\$312	2,978	\$669	1,387
Fast Food	\$12,323,331	7.00%	\$862,633	\$368	2,347	\$687	1,255
Alcohol Away from Home	\$1,506,024	10.00%	\$150,602	\$487	309	\$625	241
Snacks & Non-Alcoholic Beverages	\$1,549,467	10.00%	\$154,947	\$328	472	\$704	220
F&B SUBTOTAL			\$2,096,414		6,106		3,103
Home Furnishings	\$15,393,303	2.00%	\$307,866	\$188	1,635	\$335	920
Apparel	\$20,780,235	2.00%	\$415,605	\$222	1,874	\$566	734
Electronics	\$8,818,929	2.00%	\$176,379	\$794	222	\$958	184
Sports Equipment	\$2,302,479	2.00%	\$46,050	\$190	242	\$320	144
Books, Music & Other	\$1,100,556	2.00%	\$22,011	\$152	145	\$364	61
Pet Supplies	\$1,303,290	1.00%	\$13,033	\$187	70	\$303	43
Automotive Equipment	\$2,041,821	1.00%	\$20,418	\$177	115	\$252	81
GAFO SUBTOTAL			\$1,001,361		4,303		2,167
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$20,778,642		84,999		34,646

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - JOY-SOUTHFIELD

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$17,729,944	82,045	33,208
Alcohol at Home	\$746,327	2,275	1,803
Personal/Household Care Goods and Services	\$19,954,798	76,808	27,862
Pet Food & Services	\$506,512	2,710	1,671
NG&S SUBTOTAL	\$38,937,581	163,839	64,544
Full-Service	\$2,352,735	7,549	3,515
Fast Food	\$3,252,157	8,848	4,731
Alcohol Away from Home	\$389,555	799	624
Snacks & Non-Alcoholic Beverages	\$342,536	1,043	487
F&B SUBTOTAL	\$6,336,982	18,240	9,356
Home Furnishings	\$545,255	2,895	1,629
Apparel	\$739,865	3,336	1,307
Electronics	\$315,060	397	329
Sports Equipment	\$80,664	425	252
Books, Music & Other	\$37,197	244	102
Pet Supplies	\$38,436	206	127
Automotive Equipment	\$42,862	242	170
GAFO SUBTOTAL	\$1,799,339	7,744	3,916
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$47,073,902	189,823	77,817

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - JOY-SOUTHFIELD

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,122,762	50.00%	\$561,381	\$216	2,598	\$534	1,051
Alcohol at Home	\$42,534	50.00%	\$21,267	\$328	65	\$414	51
Personal/Household Care Goods and Services	\$1,945,644	50.00%	\$972,822	\$260	3,745	\$716	1,358
NG&S SUBTOTAL	\$3,110,940		\$1,555,470		6,407		2,461
Full-Service	\$489,626	40.00%	\$195,850	\$312	628	\$669	293
Fast Food	\$521,450	45.00%	\$234,652	\$368	638	\$687	341
F&B SUBTOTAL	\$1,011,075		\$430,502		1267		634
Home Furnishings	\$106,336	10.00%	\$10,634	\$188	56	\$335	32
Apparel	\$1,684,753	10.00%	\$168,475	\$222	760	\$566	298
Electronics	\$417,690	10.00%	\$41,769	\$794	53	\$958	44
Sports Equipment	\$318,941	10.00%	\$31,894	\$190	168	\$320	100
Books, Music & Other	\$375,335	10.00%	\$37,533	\$152	246	\$364	103
GAFO SUBTOTAL	\$2,903,056		\$290,306		1,283		576
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$2,276,278		8,957		3,671

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - JOY-SOUTHFIELD

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$381,410	55.00%	\$209,776	\$216	971	\$534	393
Alcohol at Home	\$6,293	50.00%	\$3,147	\$328	10	\$414	8
Personal/Household Care Goods and Services	\$467,087	55.00%	\$256,898	\$260	989	\$716	359
NG&S SUBTOTAL	\$854,790		\$469,820		1,969		759
Full-Service	\$221,975	50.00%	\$110,988	\$312	356	\$669	166
Fast Food	\$228,390	60.00%	\$137,034	\$368	373	\$687	199
F&B SUBTOTAL	\$450,365		\$248,022		729		365
Home Furnishings	\$15,733	10.00%	\$1,573	\$188	8	\$335	5
Apparel	\$477,437	10.00%	\$47,744	\$222	215	\$566	84
Electronics	\$73,140	10.00%	\$7,314	\$794	9	\$958	8
Sports Equipment	\$45,600	10.00%	\$4,560	\$190	24	\$320	14
Books, Music & Other	\$107,760	10.00%	\$10,776	\$152	71	\$364	30
GAFO SUBTOTAL	\$719,670		\$71,967		328		141
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$789,808		3,026		1,265

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - JOY-SOUTHFIELD

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$917,551	40.00%	\$367,020	\$216	1,698	\$534	687
Alcohol at Home	\$30,567	40.00%	\$12,227	\$328	37	\$414	30
Personal/Household Care Goods and Services	\$427,058	40.00%	\$170,823	\$260	658	\$716	239
NG&S SUBTOTAL	\$1,375,176		\$550,070		2,393		955
Full-Service	\$276,274	40.00%	\$110,509	\$312	355	\$669	165
Fast Food	\$313,497	45.00%	\$141,074	\$368	384	\$687	205
F&B SUBTOTAL	\$589,771		\$251,583		738		370
Home Furnishings	\$76,417	5.00%	\$3,821	\$188	20	\$335	11
Apparel	\$675,329	5.00%	\$33,766	\$222	152	\$566	60
Electronics	\$79,570	5.00%	\$3,978	\$794	5	\$958	4
Sports Equipment	\$29,562	5.00%	\$1,478	\$190	8	\$320	5
Books, Music & Other	\$132,547	5.00%	\$6,627	\$152	44	\$364	18
GAFO SUBTOTAL	\$993,424		\$49,671		229		98
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$851,325		3,360		1,424

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - JOY-SOUTHFIELD

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$1,138,177	5,267	2,132
Alcohol at Home	\$36,641	112	89
Personal/Household Care Goods and Services	\$1,400,543	5,391	1,956
NG&S SUBTOTAL	\$2,575,360	10,769	4,176
Full-Service	\$417,347	1,339	624
Fast Food	\$512,760	1,395	746
F&B SUBTOTAL	\$930,107	2,734	1,369
Home Furnishings	\$16,028	85	48
Apparel	\$249,985	1,127	442
Electronics	\$53,061	67	55
Sports Equipment	\$37,932	200	119
Books, Music & Other	\$54,937	361	151
GAFO SUBTOTAL	\$411,944	1,839	814
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$3,917,411	15,343	6,360

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - JOY-SOUTHFIELD

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$18,868,121	87,312	35,340
Alcohol at Home	\$782,968	2,387	1,891
Personal/Household Care Goods and Services	\$21,355,340	82,199	29,818
Pet Food & Services	\$506,512	2,710	1,671
NG&S SUBTOTAL	\$41,512,941	174,608	68,720
Full-Service	\$2,770,082	8,888	4,138
Fast Food	\$3,764,917	10,243	5,477
Alcohol Away from Home	\$389,555	799	624
Snacks & Non-Alcoholic Beverages	\$342,536	1,043	487
F&B SUBTOTAL	\$7,267,089	20,974	10,726
Home Furnishings	\$561,283	2,980	1,677
Apparel	\$989,851	4,463	1,748
Electronics	\$368,122	464	384
Sports Equipment	\$118,596	625	370
Books, Music & Other	\$92,134	605	253
Pet Supplies	\$38,436	206	127
Automotive Equipment	\$42,862	242	170
GAFO SUBTOTAL	\$2,211,283	9,584	4,731
TOTAL GENERATED RETAIL DEMAND:	\$50,991,313	205,166	84,176

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC).

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$74,523,750	55.00%	\$40,988,063	\$216	189,672	\$534	76,771
Alcohol at Home	\$4,133,584	55.00%	\$2,273,471	\$328	6,931	\$414	5,491
Personal/Household Care Goods and Services	\$98,709,191	60.00%	\$59,225,515	\$260	227,966	\$716	82,694
Pet Food & Services	\$3,636,759	45.00%	\$1,636,542	\$187	8,756	\$303	5,399
NG&S SUBTOTAL			\$104,123,590		433,325		170,356
Full-Service	\$15,759,289	45.00%	\$7,091,680	\$312	22,755	\$669	10,595
Fast Food	\$17,627,351	50.00%	\$8,813,676	\$368	23,980	\$687	12,821
Alcohol Away from Home	\$3,159,807	40.00%	\$1,263,923	\$487	2,593	\$625	2,024
Snacks & Non-Alcoholic Beverages	\$2,066,792	35.00%	\$723,377	\$328	2,203	\$704	1,028
F&B SUBTOTAL			\$17,892,656		51,531		26,467
Home Furnishings	\$28,199,787	8.00%	\$2,255,983	\$188	11,978	\$335	6,741
Apparel	\$30,107,595	8.00%	\$2,408,608	\$222	10,859	\$566	4,254
Electronics	\$13,891,227	6.00%	\$833,474	\$794	1,050	\$958	870
Sports Equipment	\$3,676,505	6.00%	\$220,590	\$190	1,162	\$320	689
Books, Music & Other	\$2,563,617	8.00%	\$205,089	\$152	1,347	\$364	564
Pet Supplies	\$2,027,046	7.00%	\$141,893	\$187	759	\$303	468
Automotive Equipment	\$3,279,045	5.00%	\$163,952	\$177	926	\$252	651
GAFO SUBTOTAL			\$6,229,589		28,080		14,237
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$128,245,835		512,936		211,061

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$96,080,418	15.00%	\$14,412,063	\$216	66,692	\$534	26,994
Alcohol at Home	\$4,757,004	15.00%	\$713,551	\$328	2,175	\$414	1,724
Personal/Household Care Goods and Services	\$119,837,781	11.00%	\$13,182,156	\$260	50,740	\$716	18,406
Pet Food & Services	\$4,425,120	10.00%	\$442,512	\$187	2,368	\$303	1,460
NG&S SUBTOTAL			\$28,750,281		121,974		48,583
Full-Service	\$18,364,248	15.00%	\$2,754,637	\$312	8,839	\$669	4,115
Fast Food	\$22,263,885	12.00%	\$2,671,666	\$368	7,269	\$687	3,886
Alcohol Away from Home	\$3,346,497	12.00%	\$401,580	\$487	824	\$625	643
Snacks & Non-Alcoholic Beverages	\$2,516,787	10.00%	\$251,679	\$328	766	\$704	358
F&B SUBTOTAL			\$6,079,562		17,698		9,002
Home Furnishings	\$32,137,434	4.00%	\$1,285,497	\$188	6,825	\$335	3,841
Apparel	\$35,898,786	4.00%	\$1,435,951	\$222	6,474	\$566	2,536
Electronics	\$17,479,224	3.00%	\$524,377	\$794	660	\$958	547
Sports Equipment	\$4,120,893	3.00%	\$123,627	\$190	651	\$320	386
Books, Music & Other	\$2,267,874	4.00%	\$90,715	\$152	596	\$364	249
Pet Supplies	\$2,461,473	4.00%	\$98,459	\$187	527	\$303	325
Automotive Equipment	\$3,733,695	2.00%	\$74,674	\$177	422	\$252	296
GAFO SUBTOTAL			\$3,633,300		16,155		8,182
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$38,463,143		155,827		65,767

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$112,061,547	5.00%	\$5,603,077	\$216	25,928	\$534	10,495
Alcohol at Home	\$5,503,446	5.00%	\$275,172	\$328	839	\$414	665
Personal/Household Care Goods and Services	\$136,953,570	3.00%	\$4,108,607	\$260	15,815	\$716	5,737
Pet Food & Services	\$5,092,269	2.00%	\$101,845	\$187	545	\$303	336
NG&S SUBTOTAL			\$10,088,702		43,127		17,232
Full-Service	\$21,159,801	5.00%	\$1,057,990	\$312	3,395	\$669	1,581
Fast Food	\$26,093,925	3.00%	\$782,818	\$368	2,130	\$687	1,139
Alcohol Away from Home	\$3,827,109	3.00%	\$114,813	\$487	236	\$625	184
Snacks & Non-Alcoholic Beverages	\$3,004,755	3.00%	\$90,143	\$328	274	\$704	128
F&B SUBTOTAL			\$2,045,764		6,035		3,031
Home Furnishings	\$36,531,495	1.00%	\$365,315	\$188	1,940	\$335	1,092
Apparel	\$42,541,005	1.00%	\$425,410	\$222	1,918	\$566	751
Electronics	\$19,894,641	1.00%	\$198,946	\$794	251	\$958	208
Sports Equipment	\$4,775,979	1.00%	\$47,760	\$190	251	\$320	149
Books, Music & Other	\$2,530,320	1.00%	\$25,303	\$152	166	\$364	70
Pet Supplies	\$2,878,239	0.50%	\$14,391	\$187	77	\$303	47
Automotive Equipment	\$4,428,060	0.50%	\$22,140	\$177	125	\$252	88
GAFO SUBTOTAL			\$1,099,266		4,728		2,405
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$13,233,732		53,889		22,668

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - LIVERNOIS-6 MILE

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$61,003,203	282,292	114,260
Alcohol at Home	\$3,262,194	9,946	7,880
Personal/Household Care Goods and Services	\$76,516,278	294,520	106,836
Pet Food & Services	\$2,180,899	11,669	7,195
NG&S SUBTOTAL	\$142,962,573	598,426	236,171
Full-Service	\$10,904,307	34,989	16,291
Fast Food	\$12,268,159	33,378	17,846
Alcohol Away from Home	\$1,780,316	3,653	2,850
Snacks & Non-Alcoholic Beverages	\$1,065,199	3,244	1,514
F&B SUBTOTAL	\$26,017,981	75,263	38,501
Home Furnishings	\$3,906,795	20,742	11,674
Apparel	\$4,269,969	19,251	7,541
Electronics	\$1,556,797	1,960	1,625
Sports Equipment	\$391,977	2,064	1,225
Books, Music & Other	\$321,108	2,108	883
Pet Supplies	\$254,743	1,363	840
Automotive Equipment	\$260,766	1,473	1,035
GAFO SUBTOTAL	\$10,962,155	48,962	24,824
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$179,942,709	722,652	299,496

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$9,888,939	50.00%	\$4,944,470	\$216	22,880	\$534	9,261
Alcohol at Home	\$374,631	50.00%	\$187,315	\$328	571	\$414	452
Personal/Household Care Goods and Services	\$17,136,633	50.00%	\$8,568,317	\$260	32,980	\$716	11,964
NG&S SUBTOTAL	\$27,400,203		\$13,700,102		56,432		21,677
Full-Service	\$4,312,471	45.00%	\$1,940,612	\$312	6,227	\$669	2,899
Fast Food	\$4,592,767	50.00%	\$2,296,383	\$368	6,248	\$687	3,340
F&B SUBTOTAL	\$8,905,238		\$4,236,995		12,475		6,240
Home Furnishings	\$936,577	10.00%	\$93,658	\$188	497	\$335	280
Apparel	\$14,838,790	10.00%	\$1,483,879	\$222	6,690	\$566	2,621
Electronics	\$3,678,885	10.00%	\$367,889	\$794	463	\$958	384
Sports Equipment	\$2,809,138	10.00%	\$280,914	\$190	1,479	\$320	878
Books, Music & Other	\$3,305,834	10.00%	\$330,583	\$152	2,171	\$364	909
GAFO SUBTOTAL	\$25,569,224		\$2,556,922		11,301		5,071
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$20,494,019		80,207		32,988

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$2,205,545	55.00%	\$1,213,050	\$216	5,613	\$534	2,272
Alcohol at Home	\$36,392	50.00%	\$18,196	\$328	55	\$414	44
Personal/Household Care Goods and Services	\$2,700,979	55.00%	\$1,485,539	\$260	5,718	\$716	2,074
Full-Service	\$1,955,088	50.00%	\$977,544	\$312	3,137	\$669	1,460
Fast Food	\$1,320,690	60.00%	\$792,414	\$368	2,156	\$687	1,153
F&B SUBTOTAL	\$3,275,778		\$1,769,958		5,293		2,613
Home Furnishings	\$90,980	12.00%	\$10,918	\$188	58	\$335	33
Apparel	\$2,760,829	12.00%	\$331,300	\$222	1,494	\$566	585
Electronics	\$422,940	12.00%	\$50,753	\$794	64	\$958	53
Sports Equipment	\$263,687	12.00%	\$31,642	\$190	167	\$320	99
Books, Music & Other	\$623,134	12.00%	\$74,776	\$152	491	\$364	206
GAFO SUBTOTAL	\$4,161,570		\$499,388		2,273		975
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$4,986,130		18,953		7,979

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,702,104	40.00%	\$680,842	\$216	3,151	\$534	1,275
Alcohol at Home	\$56,703	40.00%	\$22,681	\$328	69	\$414	55
Personal/Household Care Goods and Services	\$792,215	40.00%	\$316,886	\$260	1,220	\$716	442
NG&S SUBTOTAL	\$2,551,022		\$1,020,409		4,439		1,772
Full-Service	\$512,502	40.00%	\$205,001	\$312	658	\$669	306
Fast Food	\$581,553	45.00%	\$261,699	\$368	712	\$687	381
F&B SUBTOTAL	\$1,094,055		\$466,699		1370		687
Home Furnishings	\$141,757	5.00%	\$7,088	\$188	38	\$335	21
Apparel	\$1,252,769	5.00%	\$62,638	\$222	282	\$566	111
Electronics	\$147,606	5.00%	\$7,380	\$794	9	\$958	8
Sports Equipment	\$54,839	5.00%	\$2,742	\$190	14	\$320	9
Books, Music & Other	\$245,881	5.00%	\$12,294	\$152	81	\$364	34
GAFO SUBTOTAL	\$1,842,852		\$92,143		424		182
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,579,251		6,234		2,641

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - LIVERNOIS-6 MILE

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$6,838,361	31,644	12,808
Alcohol at Home	\$228,192	696	551
Personal/Household Care Goods and Services	\$10,370,741	39,918	14,480
NG&S SUBTOTAL	\$17,437,295	72,258	27,840
Full-Service	\$3,123,156	10,021	4,666
Fast Food	\$3,350,496	9,116	4,874
F&B SUBTOTAL	\$6,473,652	19,137	9,540
Home Furnishings	\$111,663	593	334
Apparel	\$1,877,817	8,466	3,317
Electronics	\$426,022	536	445
Sports Equipment	\$315,298	1,660	985
Books, Music & Other	\$417,654	2,742	1,148
GAFO SUBTOTAL	\$3,148,453	13,998	6,228
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$27,059,401	105,394	43,608

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

COMMUTER STUDENT-BASED RETAIL DEMAND (2017) - LIVERNOIS-6 MILE

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
NG&S	\$6,731,371	60.00%	\$4,038,823	\$268	15,072	\$555	7,281
F&B	\$3,039,624	60.00%	\$1,823,774	\$340	5,370	\$678	2,688
GAFO	\$5,666,235	35.00%	\$1,983,182	\$309	6,412	\$509	3,900
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$7,845,779		26,855		13,869

Source: Streetsense, STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - LIVERNOIS-6 MILE

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$67,841,564	313,936	127,068
Alcohol at Home	\$3,490,387	10,641	8,431
Personal/Household Care Goods and Services	\$86,887,019	334,438	121,317
Pet Food & Services	\$2,180,899	11,669	7,195
NG&S SUBTOTAL	\$164,438,691	685,756	271,292
Full-Service	\$14,027,463	45,010	20,957
Fast Food	\$15,618,656	42,494	22,720
Alcohol Away from Home	\$1,780,316	3,653	2,850
Snacks & Non-Alcoholic Beverages	\$1,065,199	3,244	1,514
F&B SUBTOTAL	\$34,315,408	99,771	50,729
Home Furnishings	\$4,018,458	21,335	12,008
Apparel	\$6,147,786	27,718	10,858
Electronics	\$1,982,818	2,497	2,070
Sports Equipment	\$707,275	3,724	2,210
Books, Music & Other	\$738,761	4,851	2,031
Pet Supplies	\$254,743	1,363	840
Automotive Equipment	\$260,766	1,473	1,035
GAFO SUBTOTAL	\$16,093,791	69,373	34,952
TOTAL GENERATED RETAIL DEMAND:	\$214,847,889	854,900	356,973

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).
 Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed.

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$115,770,020	60.00%	\$69,462,012	\$216	321,435	\$534	130,103
Alcohol at Home	\$5,559,488	60.00%	\$3,335,693	\$328	10,170	\$414	8,057
Personal/Household Care Goods and Services	\$142,651,408	60.00%	\$85,590,845	\$260	329,449	\$716	119,507
Pet Food & Services	\$5,464,724	45.00%	\$2,459,126	\$187	13,157	\$303	8,113
NG&S SUBTOTAL			\$160,847,675		674,211		265,780
Full-Service	\$20,911,256	45.00%	\$9,410,065	\$312	30,194	\$669	14,059
Fast Food	\$26,660,272	50.00%	\$13,330,136	\$368	36,268	\$687	19,391
Alcohol Away from Home	\$3,916,912	40.00%	\$1,566,765	\$487	3,215	\$625	2,508
Snacks & Non-Alcoholic Beverages	\$3,000,860	40.00%	\$1,200,344	\$328	3,655	\$704	1,706
F&B SUBTOTAL			\$25,507,310		73,332		37,664
Home Furnishings	\$39,453,412	10.00%	\$3,945,341	\$188	20,947	\$335	11,789
Apparel	\$45,107,664	10.00%	\$4,510,766	\$222	20,337	\$566	7,967
Electronics	\$20,500,612	8.00%	\$1,640,049	\$794	2,065	\$958	1,712
Sports Equipment	\$5,180,432	8.00%	\$414,435	\$190	2,182	\$320	1,295
Books, Music & Other	\$2,621,804	8.00%	\$209,744	\$152	1,377	\$364	577
Pet Supplies	\$3,095,624	8.00%	\$247,650	\$187	1,325	\$303	817
Automotive Equipment	\$4,643,436	8.00%	\$371,475	\$177	2,098	\$252	1,474
GAFO SUBTOTAL			\$11,339,460		50,332		25,631
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$197,694,446		797,874		329,075

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$170,732,760	30.00%	\$51,219,828	\$216	237,019	\$534	95,935
Alcohol at Home	\$8,355,600	30.00%	\$2,506,680	\$328	7,642	\$414	6,055
Personal/Household Care Goods and Services	\$206,801,100	30.00%	\$62,040,330	\$260	238,800	\$716	86,624
Pet Food & Services	\$8,169,920	25.00%	\$2,042,480	\$187	10,928	\$303	6,739
NG&S SUBTOTAL			\$117,809,318		494,390		195,353
Full-Service	\$33,329,560	20.00%	\$6,665,912	\$312	21,389	\$669	9,959
Fast Food	\$39,132,060	22.00%	\$8,609,053	\$368	23,423	\$687	12,523
Alcohol Away from Home	\$5,709,660	20.00%	\$1,141,932	\$487	2,343	\$625	1,828
Snacks & Non-Alcoholic Beverages	\$4,734,840	22.00%	\$1,041,665	\$328	3,172	\$704	1,480
F&B SUBTOTAL			\$17,458,562		50,327		25,791
Home Furnishings	\$57,607,220	4.00%	\$2,304,289	\$188	12,234	\$335	6,886
Apparel	\$64,384,540	4.00%	\$2,575,382	\$222	11,611	\$566	4,549
Electronics	\$29,848,060	4.00%	\$1,193,922	\$794	1,503	\$958	1,246
Sports Equipment	\$7,520,040	4.00%	\$300,802	\$190	1,584	\$320	940
Books, Music & Other	\$3,945,700	4.00%	\$157,828	\$152	1,036	\$364	434
Pet Supplies	\$4,642,000	6.00%	\$278,520	\$187	1,490	\$303	919
Automotive Equipment	\$7,148,680	4.00%	\$285,947	\$177	1,615	\$252	1,135
GAFO SUBTOTAL			\$7,096,690		31,074		16,108
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$142,364,570		575,791		237,252

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$107,009,665	12.00%	\$12,841,160	\$216	59,422	\$534	24,052
Alcohol at Home	\$6,136,340	12.00%	\$736,361	\$328	2,245	\$414	1,779
Personal/Household Care Goods and Services	\$142,554,125	12.00%	\$17,106,495	\$260	65,845	\$716	23,885
Pet Food & Services	\$5,644,275	10.00%	\$564,428	\$187	3,020	\$303	1,862
NG&S SUBTOTAL			\$31,248,443		130,532		51,578
Full-Service	\$25,442,655	8.00%	\$2,035,412	\$312	6,531	\$669	3,041
Fast Food	\$25,558,435	8.00%	\$2,044,675	\$368	5,563	\$687	2,974
Alcohol Away from Home	\$4,428,585	6.00%	\$265,715	\$487	545	\$625	425
Snacks & Non-Alcoholic Beverages	\$3,270,785	8.00%	\$261,663	\$328	797	\$704	372
F&B SUBTOTAL			\$4,607,465		13,436		6,812
Home Furnishings	\$41,130,845	3.00%	\$1,233,925	\$188	6,551	\$335	3,687
Apparel	\$42,404,425	3.00%	\$1,272,133	\$222	5,735	\$566	2,247
Electronics	\$19,537,875	3.00%	\$586,136	\$794	738	\$958	612
Sports Equipment	\$5,325,880	3.00%	\$159,776	\$190	841	\$320	499
Books, Music & Other	\$3,270,785	3.00%	\$98,124	\$152	644	\$364	270
Pet Supplies	\$3,183,950	4.00%	\$127,358	\$187	681	\$303	420
Automotive Equipment	\$5,123,265	3.00%	\$153,698	\$177	868	\$252	610
GAFO SUBTOTAL			\$3,631,150		16,060		8,345
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$39,487,058		160,028		66,735

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - NORTHWEST GRAND RIVER

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$133,523,000	617,876	250,090
Alcohol at Home	\$6,578,734	20,057	15,891
Personal/Household Care Goods and Services	\$164,737,670	634,094	230,016
Pet Food & Services	\$5,066,033	27,106	16,714
NG&S SUBTOTAL	\$309,905,437	1,299,133	512,711
Full-Service	\$18,111,390	58,115	27,058
Fast Food	\$23,983,864	65,253	34,888
Alcohol Away from Home	\$2,974,412	6,103	4,762
Snacks & Non-Alcoholic Beverages	\$2,503,672	7,624	3,558
F&B SUBTOTAL	\$47,573,337	137,094	70,267
Home Furnishings	\$7,483,555	39,732	22,362
Apparel	\$8,358,281	37,684	14,762
Electronics	\$3,420,108	4,307	3,570
Sports Equipment	\$875,013	4,608	2,734
Books, Music & Other	\$465,696	3,058	1,280
Pet Supplies	\$653,528	3,497	2,156
Automotive Equipment	\$811,120	4,581	3,219
GAFO SUBTOTAL	\$22,067,300	97,466	50,084
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$379,546,074	1,533,694	633,062

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$10,446,866	50.00%	\$5,223,433	\$216	24,171	\$534	9,784
Alcohol at Home	\$395,767	50.00%	\$197,884	\$328	603	\$414	478
Personal/Household Care Goods and Services	\$18,103,469	50.00%	\$9,051,734	\$260	34,841	\$716	12,639
NG&S SUBTOTAL	\$28,946,101		\$14,473,051		59,616		22,900
Full-Service	\$4,555,777	45.00%	\$2,050,100	\$312	6,578	\$669	3,063
Fast Food	\$4,851,887	50.00%	\$2,425,944	\$368	6,600	\$687	3,529
F&B SUBTOTAL	\$9,407,664		\$4,476,043		13179		6592
Home Furnishings	\$989,418	15.00%	\$148,413	\$188	788	\$335	443
Apparel	\$15,675,983	15.00%	\$2,351,397	\$222	10,601	\$566	4,153
Electronics	\$3,886,445	15.00%	\$582,967	\$794	734	\$958	609
Sports Equipment	\$2,967,627	15.00%	\$445,144	\$190	2,344	\$320	1,391
Books, Music & Other	\$3,492,347	15.00%	\$523,852	\$152	3,440	\$364	1,440
GAFO SUBTOTAL	\$27,011,820		\$4,051,773		17,907		8,036
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$23,000,867		90,702		37,528

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$3,462,539	60.00%	\$2,077,524	\$216	9,614	\$534	3,891
Alcohol at Home	\$57,133	45.00%	\$25,710	\$328	78	\$414	62
Personal/Household Care Goods and Services	\$4,240,335	60.00%	\$2,544,201	\$260	9,793	\$716	3,552
NG&S SUBTOTAL	\$7,760,007		\$4,647,434		19,485		7,506
Full-Service	\$2,065,392	50.00%	\$1,032,696	\$312	3,314	\$669	1,543
Fast Food	\$2,073,384	60.00%	\$1,244,030	\$368	3,385	\$687	1,810
F&B SUBTOTAL	\$4,138,776		\$2,276,726		6698		3352
Home Furnishings	\$142,831	15.00%	\$21,425	\$188	114	\$335	64
Apparel	\$4,334,295	15.00%	\$650,144	\$222	2,931	\$566	1,148
Electronics	\$663,984	15.00%	\$99,598	\$794	125	\$958	104
Sports Equipment	\$413,969	15.00%	\$62,095	\$190	327	\$320	194
Books, Music & Other	\$978,273	15.00%	\$146,741	\$152	963	\$364	403
GAFO SUBTOTAL	\$6,533,352		\$980,003		4,461		1,914
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$7,904,163		30,644		12,772

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$4,231,751	45.00%	\$1,904,288	\$216	8,812	\$534	3,567
Alcohol at Home	\$140,974	45.00%	\$63,438	\$328	193	\$414	153
Personal/Household Care Goods and Services	\$1,969,595	45.00%	\$886,318	\$260	3,412	\$716	1,238
NG&S SUBTOTAL	\$6,342,320		\$2,854,044		12,417		4,958
Full-Service	\$1,274,175	40.00%	\$509,670	\$312	1,635	\$669	761
Fast Food	\$1,445,850	40.00%	\$578,340	\$368	1,574	\$687	841
F&B SUBTOTAL	\$2,720,025		\$1,088,010		3209		1603
Home Furnishings	\$352,435	5.00%	\$17,622	\$188	94	\$335	53
Apparel	\$3,114,620	5.00%	\$155,731	\$222	702	\$566	275
Electronics	\$366,975	5.00%	\$18,349	\$794	23	\$958	19
Sports Equipment	\$136,340	5.00%	\$6,817	\$190	36	\$320	21
Books, Music & Other	\$611,305	5.00%	\$30,565	\$152	201	\$364	84
GAFO SUBTOTAL	\$4,581,675		\$229,084		1,055		452
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$4,171,138		16,681		7,012

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - NORTHWEST GRAND RIVER

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$9,205,244	42,597	17,242
Alcohol at Home	\$287,031	875	693
Personal/Household Care Goods and Services	\$12,482,253	48,046	17,428
NG&S SUBTOTAL	\$21,974,529	91,518	35,363
Full-Service	\$3,592,466	11,527	5,367
Fast Food	\$4,248,314	11,558	6,180
F&B SUBTOTAL	\$7,840,780	23,086	11,547
Home Furnishings	\$187,459	995	560
Apparel	\$3,157,273	14,235	5,576
Electronics	\$700,913	883	732
Sports Equipment	\$514,056	2,707	1,606
Books, Music & Other	\$701,158	4,604	1,928
GAFO SUBTOTAL	\$5,260,859	23,423	10,402
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$35,076,168	138,027	57,312

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

VISITOR-BASED RETAIL DEMAND (2017) - NORTHWEST GRAND RIVER

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
NG&S	\$134,671	35.00%	\$47,135	\$268	176	\$555	85
F&B	\$654,324	35.00%	\$229,014	\$340	674	\$678	338
GAFO	\$887,620	35.00%	\$310,667	\$309	1,004	\$509	611
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$586,816		1,855		1,033

Source: Streetsense, STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - NORTHWEST GRAND RIVER

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$142,728,244	660,473	267,331
Alcohol at Home	\$6,865,765	20,932	16,584
Personal/Household Care Goods and Services	\$177,219,922	682,140	247,445
Pet Food & Services	\$5,066,033	27,106	16,714
NG&S SUBTOTAL	\$331,927,100	1,390,827	548,159
Full-Service	\$21,703,855	69,642	32,425
Fast Food	\$28,232,178	76,812	41,068
Alcohol Away from Home	\$2,974,412	6,103	4,762
Snacks & Non-Alcoholic Beverages	\$2,503,672	7,624	3,558
F&B SUBTOTAL	\$55,643,130	160,854	82,151
Home Furnishings	\$7,671,014	40,727	22,922
Apparel	\$11,515,553	51,919	20,338
Electronics	\$4,121,021	5,190	4,302
Sports Equipment	\$1,389,069	7,315	4,339
Books, Music & Other	\$1,166,854	7,662	3,208
Pet Supplies	\$653,528	3,497	2,156
Automotive Equipment	\$811,120	4,581	3,219
GAFO SUBTOTAL	\$27,638,827	121,894	61,097
TOTAL GENERATED RETAIL DEMAND:	\$415,209,057	1,673,575	691,408

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).

Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed.

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$72,485,704	35.00%	\$25,369,996	\$216	117,399	\$534	47,518
Alcohol at Home	\$3,126,906	35.00%	\$1,094,417	\$328	3,337	\$414	2,644
Personal/Household Care Goods and Services	\$78,666,372	35.00%	\$27,533,230	\$260	105,979	\$716	38,443
Pet Food & Services	\$3,090,334	30.00%	\$927,100	\$187	4,960	\$303	3,059
NG&S SUBTOTAL			\$54,924,744		231,675		91,664
Full-Service	\$12,489,338	25.00%	\$3,122,335	\$312	10,019	\$669	4,665
Fast Food	\$16,493,972	25.00%	\$4,123,493	\$368	11,219	\$687	5,998
Alcohol Away from Home	\$2,066,318	25.00%	\$516,580	\$487	1,060	\$625	827
Snacks & Non-Alcoholic Beverages	\$2,084,604	25.00%	\$521,151	\$328	1,587	\$704	741
F&B SUBTOTAL			\$8,283,558		23,884		12,231
Home Furnishings	\$21,815,198	10.00%	\$2,181,520	\$188	11,582	\$335	6,519
Apparel	\$28,544,446	10.00%	\$2,854,445	\$222	12,869	\$566	5,041
Electronics	\$11,721,326	8.00%	\$937,706	\$794	1,181	\$958	979
Sports Equipment	\$3,254,908	8.00%	\$260,393	\$190	1,371	\$320	813
Books, Music & Other	\$1,426,308	8.00%	\$114,105	\$152	749	\$364	314
Pet Supplies	\$1,810,314	8.00%	\$144,825	\$187	775	\$303	478
Automotive Equipment	\$2,834,330	8.00%	\$226,746	\$177	1,281	\$252	900
GAFO SUBTOTAL			\$6,719,739		29,809		15,044
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$69,928,041		285,368		118,939

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$135,584,932	12.00%	\$16,270,192	\$216	75,290	\$534	30,474
Alcohol at Home	\$6,687,128	12.00%	\$802,455	\$328	2,447	\$414	1,938
Personal/Household Care Goods and Services	\$157,215,744	12.00%	\$18,865,889	\$260	72,617	\$716	26,342
Pet Food & Services	\$6,141,240	10.00%	\$614,124	\$187	3,286	\$303	2,026
NG&S SUBTOTAL			\$36,552,660		153,639		60,780
Full-Service	\$29,477,952	10.00%	\$2,947,795	\$312	9,459	\$669	4,404
Fast Food	\$30,330,902	10.00%	\$3,033,090	\$368	8,252	\$687	4,412
Alcohol Away from Home	\$4,367,104	10.00%	\$436,710	\$487	896	\$625	699
Snacks & Non-Alcoholic Beverages	\$4,264,750	10.00%	\$426,475	\$328	1,299	\$704	606
F&B SUBTOTAL			\$6,844,071		19,906		10,121
Home Furnishings	\$45,206,350	3.00%	\$1,356,191	\$188	7,200	\$335	4,053
Apparel	\$50,835,820	3.00%	\$1,525,075	\$222	6,876	\$566	2,694
Electronics	\$22,244,936	3.00%	\$667,348	\$794	840	\$958	697
Sports Equipment	\$6,141,240	3.00%	\$184,237	\$190	970	\$320	576
Books, Music & Other	\$3,241,210	3.00%	\$97,236	\$152	638	\$364	267
Pet Supplies	\$3,548,272	4.00%	\$141,931	\$187	759	\$303	468
Automotive Equipment	\$5,765,942	2.00%	\$115,319	\$177	651	\$252	458
GAFO SUBTOTAL			\$4,087,336		17,936		9,212
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$47,484,068		191,481		80,113

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - OSBORN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$41,640,188	192,689	77,992
Alcohol at Home	\$1,896,872	5,783	4,582
Personal/Household Care Goods and Services	\$46,399,119	178,596	64,785
Pet Food & Services	\$1,541,224	8,246	5,085
NG&S SUBTOTAL	\$91,477,404	385,314	152,444
Full-Service	\$6,070,130	19,477	9,069
Fast Food	\$7,156,583	19,471	10,410
Alcohol Away from Home	\$953,290	1,956	1,526
Snacks & Non-Alcoholic Beverages	\$947,626	2,886	1,347
F&B SUBTOTAL	\$15,127,629	43,790	22,352
Home Furnishings	\$3,537,710	18,783	10,571
Apparel	\$4,379,519	19,745	7,735
Electronics	\$1,605,054	2,021	1,676
Sports Equipment	\$444,630	2,341	1,389
Books, Music & Other	\$211,341	1,388	581
Pet Supplies	\$286,756	1,534	946
Automotive Equipment	\$342,065	1,932	1,358
GAFO SUBTOTAL	\$10,807,076	47,745	24,256
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$117,412,109	476,849	199,052

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$6,119,915	25.00%	\$1,529,979	\$216	7,080	\$534	2,866
Alcohol at Home	\$231,846	25.00%	\$57,961	\$328	177	\$414	140
Personal/Household Care Goods and Services	\$10,605,256	25.00%	\$2,651,314	\$260	10,205	\$716	3,702
NG&S SUBTOTAL	\$16,957,017		\$4,239,254		17,462		6,708
Full-Service	\$2,668,836	25.00%	\$667,209	\$312	2,141	\$669	997
Fast Food	\$2,842,301	25.00%	\$710,575	\$368	1,933	\$687	1,034
F&B SUBTOTAL	\$5,511,137		\$1,377,784		4,074		2,030
Home Furnishings	\$579,614	8.00%	\$46,369	\$188	246	\$335	139
Apparel	\$9,183,202	8.00%	\$734,656	\$222	3,312	\$566	1,298
Electronics	\$2,276,732	8.00%	\$182,139	\$794	229	\$958	190
Sports Equipment	\$1,738,476	8.00%	\$139,078	\$190	732	\$320	434
Books, Music & Other	\$2,045,864	8.00%	\$163,669	\$152	1,075	\$364	450
GAFO SUBTOTAL	\$15,823,888		\$1,265,911		5,595		2,511
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$6,882,949		27,131		11,249

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$2,437,707	25.00%	\$609,427	\$216	2,820	\$534	1,141
Alcohol at Home	\$40,223	25.00%	\$10,056	\$328	31	\$414	24
Personal/Household Care Goods and Services	\$2,985,293	25.00%	\$746,323	\$260	2,873	\$716	1,042
NG&S SUBTOTAL	\$5,463,223		\$1,365,806		5,723		2,208
Full-Service	\$1,209,935	30.00%	\$362,980	\$312	1,165	\$669	542
Fast Food	\$1,459,710	30.00%	\$437,913	\$368	1,191	\$687	637
F&B SUBTOTAL	\$2,669,645		\$800,893		2356		1179
Home Furnishings	\$100,557	10.00%	\$10,056	\$188	53	\$335	30
Apparel	\$3,051,443	10.00%	\$305,144	\$222	1,376	\$566	539
Electronics	\$467,460	10.00%	\$46,746	\$794	59	\$958	49
Sports Equipment	\$291,443	10.00%	\$29,144	\$190	153	\$320	91
Books, Music & Other	\$688,727	10.00%	\$68,873	\$152	452	\$364	189
GAFO SUBTOTAL	\$4,599,630		\$459,963		2,094		898
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$2,626,662		10,173		4,285

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$3,158,364	20.00%	\$631,673	\$216	2,923	\$534	1,183
Alcohol at Home	\$105,216	20.00%	\$21,043	\$328	64	\$414	51
Personal/Household Care Goods and Services	\$1,470,005	20.00%	\$294,001	\$260	1,132	\$716	411
NG&S SUBTOTAL	\$4,733,585		\$946,717		4,119		1,644
Full-Service	\$950,980	25.00%	\$237,745	\$312	763	\$669	355
Fast Food	\$1,079,109	25.00%	\$269,777	\$368	734	\$687	392
F&B SUBTOTAL	\$2,030,089		\$507,522		1497		748
Home Furnishings	\$263,039	5.00%	\$13,152	\$188	70	\$335	39
Apparel	\$2,324,594	5.00%	\$116,230	\$222	524	\$566	205
Electronics	\$273,892	5.00%	\$13,695	\$794	17	\$958	14
Sports Equipment	\$101,757	5.00%	\$5,088	\$190	27	\$320	16
Books, Music & Other	\$456,247	5.00%	\$22,812	\$152	150	\$364	63
GAFO SUBTOTAL	\$3,419,530		\$170,976		788		337
\$1,625,216			\$1,625,216		6,403		2,730

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - OSBORN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$2,771,078	12,823	5,190
Alcohol at Home	\$89,060	272	215
Personal/Household Care Goods and Services	\$3,691,638	14,210	5,154
NG&S SUBTOTAL	\$6,551,777	27,304	10,560
Full-Service	\$1,267,934	4,068	1,894
Fast Food	\$1,418,265	3,859	2,063
F&B SUBTOTAL	\$2,686,200	7,927	3,957
Home Furnishings	\$69,577	369	208
Apparel	\$1,156,030	5,212	2,042
Electronics	\$242,579	305	253
Sports Equipment	\$173,310	913	541
Books, Music & Other	\$255,354	1,677	702
GAFO SUBTOTAL	\$1,896,851	8,476	3,746
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$11,134,827	43,708	18,264

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

VISITOR-BASED RETAIL DEMAND (2017) - OSBORN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
NG&S	\$348,389	30.00%	\$104,517	\$268	390	\$555	188
F&B	\$1,692,709	40.00%	\$677,083	\$340	1,994	\$678	998
GAFO	\$2,296,235	25.00%	\$574,059	\$309	1,856	\$509	1,129
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$1,355,659		4,240		2,315

Source: Streetsense, STR, Hotels.com, Detroit Convention & Visitors Bureau (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - OSBORN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$44,411,267	205,513	83,183
Alcohol at Home	\$1,985,933	6,055	4,797
Personal/Household Care Goods and Services	\$50,090,758	192,805	69,940
Pet Food & Services	\$1,541,224	8,246	5,085
NG&S SUBTOTAL	\$98,133,698	413,009	163,193
Full-Service	\$7,338,064	23,546	10,963
Fast Food	\$8,574,849	23,330	12,473
Alcohol Away from Home	\$953,290	1,956	1,526
Snacks & Non-Alcoholic Beverages	\$947,626	2,886	1,347
F&B SUBTOTAL	\$18,490,912	53,711	27,308
Home Furnishings	\$3,607,287	19,152	10,779
Apparel	\$5,535,549	24,957	9,777
Electronics	\$1,847,633	2,327	1,929
Sports Equipment	\$617,940	3,254	1,930
Books, Music & Other	\$466,695	3,064	1,283
Pet Supplies	\$286,756	1,534	946
Automotive Equipment	\$342,065	1,932	1,358
GAFO SUBTOTAL	\$13,277,985	58,077	29,131
TOTAL GENERATED RETAIL DEMAND:	\$129,902,595	524,796	219,631

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC).

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - ROSA PARKS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$14,752,659	45.00%	\$6,638,697	\$216	30,720	\$534	12,434
Alcohol at Home	\$688,428	40.00%	\$275,371	\$328	840	\$414	665
Personal/Household Care Goods and Services	\$17,877,063	45.00%	\$8,044,678	\$260	30,965	\$716	11,232
Pet Food & Services	\$644,298	40.00%	\$257,719	\$187	1,379	\$303	850
NG&S SUBTOTAL			\$15,216,465		63,904		25,182
Full-Service	\$2,435,976	25.00%	\$608,994	\$312	1,954	\$669	910
Fast Food	\$3,375,945	25.00%	\$843,986	\$368	2,296	\$687	1,228
Alcohol Away from Home	\$485,430	25.00%	\$121,358	\$487	249	\$625	194
Snacks & Non-Alcoholic Beverages	\$348,627	25.00%	\$87,157	\$328	265	\$704	124
F&B SUBTOTAL			\$1,661,495		4,765		2,456
Home Furnishings	\$4,474,782	5.00%	\$223,739	\$188	1,188	\$335	669
Apparel	\$5,441,229	5.00%	\$272,061	\$222	1,227	\$566	481
Electronics	\$2,696,343	5.00%	\$134,817	\$794	170	\$958	141
Sports Equipment	\$569,277	5.00%	\$28,464	\$190	150	\$320	89
Books, Music & Other	\$335,388	5.00%	\$16,769	\$152	110	\$364	46
Pet Supplies	\$353,040	5.00%	\$17,652	\$187	94	\$303	58
Automotive Equipment	\$503,082	5.00%	\$25,154	\$177	142	\$252	100
GAFO SUBTOTAL			\$718,657		3,081		1,583
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$17,596,617		71,749		29,221

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - ROSA PARKS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$22,060,931	15.00%	\$3,309,140	\$216	15,313	\$534	6,198
Alcohol at Home	\$1,078,950	15.00%	\$161,843	\$328	493	\$414	391
Personal/Household Care Goods and Services	\$25,758,133	15.00%	\$3,863,720	\$260	14,872	\$716	5,395
Pet Food & Services	\$956,669	15.00%	\$143,500	\$187	768	\$303	473
NG&S SUBTOTAL			\$7,478,202		31,446		12,457
Full-Service	\$3,711,588	12.00%	\$445,391	\$312	1,429	\$669	665
Fast Food	\$5,294,048	14.00%	\$741,167	\$368	2,017	\$687	1,078
Alcohol Away from Home	\$769,651	12.00%	\$92,358	\$487	189	\$625	148
Snacks & Non-Alcoholic Beverages	\$539,475	12.00%	\$64,737	\$328	197	\$704	92
F&B SUBTOTAL			\$1,343,652		3,832		1,983
Home Furnishings	\$6,243,524	3.00%	\$187,306	\$188	994	\$335	560
Apparel	\$7,948,265	3.00%	\$238,448	\$222	1,075	\$566	421
Electronics	\$4,258,256	3.00%	\$127,748	\$794	161	\$958	133
Sports Equipment	\$755,265	3.00%	\$22,658	\$190	119	\$320	71
Books, Music & Other	\$503,510	3.00%	\$15,105	\$152	99	\$364	42
Pet Supplies	\$525,089	4.00%	\$21,004	\$187	112	\$303	69
Automotive Equipment	\$712,107	3.00%	\$21,363	\$177	121	\$252	85
GAFO SUBTOTAL			\$633,631		2,682		1,381
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$9,455,486		37,960		15,821

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - ROSA PARKS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$9,947,836	46,033	18,632
Alcohol at Home	\$437,214	1,333	1,056
Personal/Household Care Goods and Services	\$11,908,398	45,837	16,627
Pet Food & Services	\$401,220	2,147	1,324
NG&S SUBTOTAL	\$22,694,668	95,350	37,639
Full-Service	\$1,054,385	3,383	1,575
Fast Food	\$1,585,153	4,313	2,306
Alcohol Away from Home	\$213,716	438	342
Snacks & Non-Alcoholic Beverages	\$151,894	463	216
F&B SUBTOTAL	\$3,005,147	8,597	4,439
Home Furnishings	\$411,045	2,182	1,228
Apparel	\$510,509	2,302	902
Electronics	\$262,565	331	274
Sports Equipment	\$51,122	269	160
Books, Music & Other	\$31,875	209	88
Pet Supplies	\$38,656	207	128
Automotive Equipment	\$46,517	263	185
GAFO SUBTOTAL	\$1,352,288	5,763	2,964
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$27,052,103	109,710	45,042

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - ROSA PARKS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$7,339,407	45.00%	\$3,302,733	\$216	15,283	\$534	6,186
Alcohol at Home	\$278,045	45.00%	\$125,120	\$328	381	\$414	302
Personal/Household Care Goods and Services	\$12,718,525	45.00%	\$5,723,336	\$260	22,030	\$716	7,991
NG&S SUBTOTAL	\$20,335,976		\$9,151,189		37,695		14,480
Full-Service	\$3,200,644	50.00%	\$1,600,322	\$312	5,135	\$669	2,391
Fast Food	\$3,408,675	45.00%	\$1,533,904	\$368	4,173	\$687	2,231
F&B SUBTOTAL	\$6,609,320		\$3,134,226		9308		4622
Home Furnishings	\$695,112	5.00%	\$34,756	\$188	185	\$335	104
Apparel	\$11,013,104	5.00%	\$550,655	\$222	2,483	\$566	973
Electronics	\$2,730,407	5.00%	\$136,520	\$794	172	\$958	143
Sports Equipment	\$2,084,896	5.00%	\$104,245	\$190	549	\$320	326
Books, Music & Other	\$2,453,535	5.00%	\$122,677	\$152	805	\$364	337
GAFO SUBTOTAL	\$18,977,054		\$948,853		4,194		1,882
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$13,234,268		51,196		20,984

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - ROSA PARKS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$216,409	45.00%	\$97,384	\$216	451	\$534	182
Alcohol at Home	\$3,571	45.00%	\$1,607	\$328	5	\$414	4
Personal/Household Care Goods and Services	\$265,021	45.00%	\$119,259	\$260	459	\$716	167
NG&S SUBTOTAL	\$485,000		\$218,250		915		353
Full-Service	\$1,451,034	50.00%	\$725,517	\$312	2,328	\$669	1,084
Fast Food	\$129,587	50.00%	\$64,793	\$368	176	\$687	94
F&B SUBTOTAL	\$1,580,620		\$790,310		2504		1178
Home Furnishings	\$8,927	5.00%	\$446	\$188	2	\$335	1
Apparel	\$270,893	5.00%	\$13,545	\$222	61	\$566	24
Electronics	\$41,499	5.00%	\$2,075	\$794	3	\$958	2
Sports Equipment	\$25,873	5.00%	\$1,294	\$190	7	\$320	4
Books, Music & Other	\$61,142	5.00%	\$3,057	\$152	20	\$364	8
GAFO SUBTOTAL	\$408,335		\$20,417		93		40
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,028,977		3,512		1,571

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - ROSA PARKS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$196,138	30.00%	\$58,841	\$216	272	\$534	110
Alcohol at Home	\$6,534	30.00%	\$1,960	\$328	6	\$414	5
Personal/Household Care Goods and Services	\$91,289	30.00%	\$27,387	\$260	105	\$716	38
NG&S SUBTOTAL	\$293,961		\$88,188		384		153
Full-Service	\$59,057	35.00%	\$20,670	\$312	66	\$669	31
Fast Food	\$67,014	30.00%	\$20,104	\$368	55	\$687	29
F&B SUBTOTAL	\$126,071		\$40,774		121		60
Home Furnishings	\$16,335	3.00%	\$490	\$188	3	\$335	1
Apparel	\$144,360	3.00%	\$4,331	\$222	20	\$566	8
Electronics	\$17,009	3.00%	\$510	\$794	1	\$958	1
Sports Equipment	\$6,319	3.00%	\$190	\$190	1	\$320	1
Books, Music & Other	\$28,334	5.00%	\$1,417	\$152	9	\$364	4
GAFO SUBTOTAL	\$212,357		\$6,937		33		14
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$135,900		538		227

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - ROSA PARKS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$3,458,958	16,006	6,479
Alcohol at Home	\$128,687	392	311
Personal/Household Care Goods and Services	\$5,869,982	22,594	8,196
NG&S SUBTOTAL	\$9,457,628	38,993	14,986
Full-Service	\$2,346,509	7,529	3,506
Fast Food	\$1,618,801	4,404	2,355
F&B SUBTOTAL	\$3,965,310	11,934	5,860
Home Furnishings	\$35,692	189	107
Apparel	\$568,531	2,563	1,004
Electronics	\$139,106	175	145
Sports Equipment	\$105,728	557	330
Books, Music & Other	\$127,151	835	350
GAFO SUBTOTAL	\$976,207	4,320	1,936
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$14,399,145	55,246	22,782

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - ROSA PARKS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$13,406,795	62,040	25,111
Alcohol at Home	\$565,901	1,725	1,367
Personal/Household Care Goods and Services	\$17,778,381	68,431	24,823
Pet Food & Services	\$401,220	2,147	1,324
NG&S SUBTOTAL	\$32,173,375	134,421	52,663
Full-Service	\$3,400,893	10,913	5,081
Fast Food	\$3,203,954	8,717	4,661
Alcohol Away from Home	\$213,716	438	342
Snacks & Non-Alcoholic Beverages	\$151,894	463	216
F&B SUBTOTAL	\$7,079,701	20,852	10,461
Home Furnishings	\$446,737	2,372	1,335
Apparel	\$1,079,040	4,865	1,906
Electronics	\$401,670	506	419
Sports Equipment	\$156,850	826	490
Books, Music & Other	\$159,025	1,044	437
Pet Supplies	\$38,656	207	128
Automotive Equipment	\$46,517	263	185
GAFO SUBTOTAL	\$2,444,272	10,457	5,127
TOTAL GENERATED RETAIL DEMAND:	\$41,697,347	165,730	68,251

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC).

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - RUSSELL WOODS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$38,725,369	40.00%	\$15,490,148	\$216	71,680	\$534	29,013
Alcohol at Home	\$1,787,689	40.00%	\$715,076	\$328	2,180	\$414	1,727
Personal/Household Care Goods and Services	\$46,337,846	40.00%	\$18,535,138	\$260	71,344	\$716	25,880
Pet Food & Services	\$1,633,782	35.00%	\$571,824	\$187	3,060	\$303	1,887
NG&S SUBTOTAL			\$35,312,185		148,264		58,507
Full-Service	\$6,144,441	25.00%	\$1,536,110	\$312	4,929	\$669	2,295
Fast Food	\$8,985,801	25.00%	\$2,246,450	\$368	6,112	\$687	3,268
Alcohol Away from Home	\$1,231,256	25.00%	\$307,814	\$487	632	\$625	493
Snacks & Non-Alcoholic Beverages	\$887,925	25.00%	\$221,981	\$328	676	\$704	315
F&B SUBTOTAL			\$4,312,356		12,348		6,371
Home Furnishings	\$11,483,830	3.00%	\$344,515	\$188	1,829	\$335	1,029
Apparel	\$14,159,444	3.00%	\$424,783	\$222	1,915	\$566	750
Electronics	\$7,115,239	3.00%	\$213,457	\$794	269	\$958	223
Sports Equipment	\$1,432,519	3.00%	\$42,976	\$190	226	\$320	134
Books, Music & Other	\$805,052	3.00%	\$24,152	\$152	159	\$364	66
Pet Supplies	\$911,603	2.50%	\$22,790	\$187	122	\$303	75
Automotive Equipment	\$1,290,451	2.00%	\$25,809	\$177	146	\$252	102
GAFO SUBTOTAL			\$1,098,482		4,666		2,381
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$40,723,023		165,278		67,259

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - RUSSELL WOODS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$50,347,262	18.00%	\$9,062,507	\$216	41,937	\$534	16,974
Alcohol at Home	\$2,242,003	18.00%	\$403,561	\$328	1,230	\$414	975
Personal/Household Care Goods and Services	\$59,766,684	15.00%	\$8,965,003	\$260	34,507	\$716	12,517
Pet Food & Services	\$2,136,674	10.00%	\$213,667	\$187	1,143	\$303	705
NG&S SUBTOTAL			\$18,644,738		78,818		31,171
Full-Service	\$7,734,158	10.00%	\$773,416	\$312	2,482	\$669	1,155
Fast Food	\$11,375,532	15.00%	\$1,706,330	\$368	4,642	\$687	2,482
Alcohol Away from Home	\$1,534,794	10.00%	\$153,479	\$487	315	\$625	246
Snacks & Non-Alcoholic Beverages	\$1,128,525	10.00%	\$112,853	\$328	344	\$704	160
F&B SUBTOTAL			\$2,746,078		7,783		4,044
Home Furnishings	\$14,610,637	2.00%	\$292,213	\$188	1,551	\$335	873
Apparel	\$18,297,152	2.00%	\$365,943	\$222	1,650	\$566	646
Electronics	\$9,043,247	2.00%	\$180,865	\$794	228	\$958	189
Sports Equipment	\$1,865,828	2.00%	\$37,317	\$190	197	\$320	117
Books, Music & Other	\$1,008,149	2.00%	\$20,163	\$152	132	\$364	55
Pet Supplies	\$1,158,619	1.00%	\$11,586	\$187	62	\$303	38
Automotive Equipment	\$1,625,076	1.00%	\$16,251	\$177	92	\$252	64
GAFO SUBTOTAL			\$924,337		3,912		1,983
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$22,315,152		90,512		37,198

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - RUSSELL WOODS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$24,552,655	113,617	45,987
Alcohol at Home	\$1,118,636	3,410	2,702
Personal/Household Care Goods and Services	\$27,500,141	105,851	38,397
Pet Food & Services	\$785,491	4,203	2,592
NG&S SUBTOTAL	\$53,956,923	227,082	89,678
Full-Service	\$2,309,526	7,411	3,450
Fast Food	\$3,952,780	10,754	5,750
Alcohol Away from Home	\$461,293	946	739
Snacks & Non-Alcoholic Beverages	\$334,834	1,020	476
F&B SUBTOTAL	\$7,058,433	20,131	10,415
Home Furnishings	\$636,728	3,381	1,903
Apparel	\$790,726	3,565	1,397
Electronics	\$394,322	497	412
Sports Equipment	\$80,292	423	251
Books, Music & Other	\$44,315	291	122
Pet Supplies	\$34,376	184	113
Automotive Equipment	\$42,060	238	167
GAFO SUBTOTAL	\$2,022,819	8,577	4,364
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$63,038,175	255,790	104,457

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - RUSSELL WOODS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$4,278,586	40.00%	\$1,711,434	\$216	7,920	\$534	3,206
Alcohol at Home	\$162,089	35.00%	\$56,731	\$328	173	\$414	137
Personal/Household Care Goods and Services	\$7,414,400	40.00%	\$2,965,760	\$260	11,416	\$716	4,141
NG&S SUBTOTAL	\$11,855,075		\$4,733,926		19,508		7,484
Full-Service	\$1,865,850	28.00%	\$522,438	\$312	1,676	\$669	781
Fast Food	\$1,987,124	30.00%	\$596,137	\$368	1,622	\$687	867
F&B SUBTOTAL	\$3,852,974		\$1,118,575		3,298		1,648
Home Furnishings	\$405,223	3.00%	\$12,157	\$188	65	\$335	36
Apparel	\$6,420,207	2.00%	\$128,404	\$222	579	\$566	227
Electronics	\$1,591,720	3.00%	\$47,752	\$794	60	\$958	50
Sports Equipment	\$1,215,412	3.00%	\$36,462	\$190	192	\$320	114
Books, Music & Other	\$1,430,315	3.00%	\$42,909	\$152	282	\$364	118
GAFO SUBTOTAL	\$11,062,876		\$267,684		1,177		545
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$6,120,185		23,984		9,676

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - RUSSELL WOODS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$973,425	40.00%	\$389,370	\$216	1,802	\$534	729
Alcohol at Home	\$16,062	35.00%	\$5,622	\$328	17	\$414	14
Personal/Household Care Goods and Services	\$1,192,086	45.00%	\$536,439	\$260	2,065	\$716	749
NG&S SUBTOTAL	\$2,181,573		\$931,430		3,884		1,492
Full-Service	\$845,896	35.00%	\$296,063	\$312	950	\$669	442
Fast Food	\$582,891	40.00%	\$233,156	\$368	634	\$687	339
F&B SUBTOTAL	\$1,428,787		\$529,220		1584		781
Home Furnishings	\$40,154	1.50%	\$602	\$188	3	\$335	2
Apparel	\$1,218,501	1.50%	\$18,278	\$222	82	\$566	32
Electronics	\$186,666	1.50%	\$2,800	\$794	4	\$958	3
Sports Equipment	\$116,379	1.50%	\$1,746	\$190	9	\$320	5
Books, Music & Other	\$275,022	1.50%	\$4,125	\$152	27	\$364	11
GAFO SUBTOTAL	\$1,836,723		\$27,551		125		54
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,488,201		5,594		2,327

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - RUSSELL WOODS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,065,327	35.00%	\$372,864	\$216	1,725	\$534	698
Alcohol at Home	\$35,490	30.00%	\$10,647	\$328	32	\$414	26
Personal/Household Care Goods and Services	\$495,838	35.00%	\$173,543	\$260	668	\$716	242
NG&S SUBTOTAL	\$1,596,654		\$557,054		2,426		966
Full-Service	\$320,769	30.00%	\$96,231	\$312	309	\$669	144
Fast Food	\$363,987	35.00%	\$127,395	\$368	347	\$687	185
F&B SUBTOTAL	\$684,756		\$223,626		655		329
Home Furnishings	\$88,724	1.00%	\$887	\$188	5	\$335	3
Apparel	\$784,093	1.00%	\$7,841	\$222	35	\$566	14
Electronics	\$92,385	1.00%	\$924	\$794	1	\$958	1
Sports Equipment	\$34,323	1.00%	\$343	\$190	2	\$320	1
Books, Music & Other	\$153,894	1.00%	\$1,539	\$152	10	\$364	4
GAFO SUBTOTAL	\$1,153,419		\$11,534		53		23
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$792,215		3,134		1,318

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - RUSSELL WOODS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$2,473,668	11,447	4,633
Alcohol at Home	\$73,000	223	176
Personal/Household Care Goods and Services	\$3,675,742	14,148	5,132
NG&S SUBTOTAL	\$6,222,410	25,818	9,942
Full-Service	\$914,732	2,935	1,367
Fast Food	\$956,689	2,603	1,392
F&B SUBTOTAL	\$1,871,421	5,538	2,758
Home Furnishings	\$13,646	72	41
Apparel	\$154,523	697	273
Electronics	\$51,475	65	54
Sports Equipment	\$38,551	203	120
Books, Music & Other	\$48,574	319	134
GAFO SUBTOTAL	\$306,769	1,356	621
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$8,400,600	32,712	13,321

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - RUSSELL WOODS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$27,026,323	125,064	50,621
Alcohol at Home	\$1,191,636	3,633	2,878
Personal/Household Care Goods and Services	\$31,175,883	120,000	43,530
Pet Food & Services	\$785,491	4,203	2,592
NG&S SUBTOTAL	\$60,179,333	252,899	99,620
Full-Service	\$3,224,258	10,346	4,817
Fast Food	\$4,909,469	13,357	7,142
Alcohol Away from Home	\$461,293	946	739
Snacks & Non-Alcoholic Beverages	\$334,834	1,020	476
F&B SUBTOTAL	\$8,929,854	25,669	13,173
Home Furnishings	\$650,374	3,453	1,943
Apparel	\$945,249	4,262	1,669
Electronics	\$445,798	561	465
Sports Equipment	\$118,843	626	371
Books, Music & Other	\$92,888	610	255
Pet Supplies	\$34,376	184	113
Automotive Equipment	\$42,060	238	167
GAFO SUBTOTAL	\$2,329,588	9,933	4,985
TOTAL GENERATED RETAIL DEMAND:	\$71,438,775	288,502	117,778

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC)

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$21,885,188	40.00%	\$8,754,075	\$216	40,509	\$534	16,396
Alcohol at Home	\$1,000,704	40.00%	\$400,282	\$328	1,220	\$414	967
Personal/Household Care Goods and Services	\$20,618,672	40.00%	\$8,247,469	\$260	31,745	\$716	11,516
Pet Food & Services	\$807,860	30.00%	\$242,358	\$187	1,297	\$303	800
NG&S SUBTOTAL			\$17,644,184		74,772		29,679
Full-Service	\$4,289,476	25.00%	\$1,072,369	\$312	3,441	\$669	1,602
Fast Food	\$5,066,064	40.00%	\$2,026,426	\$368	5,513	\$687	2,948
Alcohol Away from Home	\$510,776	30.00%	\$153,233	\$487	314	\$625	245
Snacks & Non-Alcoholic Beverages	\$698,408	45.00%	\$314,284	\$328	957	\$704	447
F&B SUBTOTAL			\$3,566,311		10,226		5,242
Home Furnishings	\$5,363,148	8.00%	\$429,052	\$188	2,278	\$335	1,282
Apparel	\$8,203,688	8.00%	\$656,295	\$222	2,959	\$566	1,159
Electronics	\$3,226,228	8.00%	\$258,098	\$794	325	\$958	269
Sports Equipment	\$959,008	8.00%	\$76,721	\$190	404	\$320	240
Books, Music & Other	\$343,992	8.00%	\$27,519	\$152	181	\$364	76
Pet Supplies	\$474,292	8.00%	\$37,943	\$187	203	\$303	125
Automotive Equipment	\$714,044	8.00%	\$57,124	\$177	323	\$252	227
GAFO SUBTOTAL			\$1,542,752		6,672		3,378
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$22,753,247		91,670		38,298

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$42,092,744	12.00%	\$5,051,129	\$216	23,374	\$534	9,461
Alcohol at Home	\$1,789,134	12.00%	\$214,696	\$328	655	\$414	519
Personal/Household Care Goods and Services	\$38,495,238	12.00%	\$4,619,429	\$260	17,781	\$716	6,450
Pet Food & Services	\$1,519,802	10.00%	\$151,980	\$187	813	\$303	501
NG&S SUBTOTAL			\$10,037,234		42,622		16,931
Full-Service	\$7,974,151	18.00%	\$1,435,347	\$312	4,606	\$669	2,144
Fast Food	\$9,388,144	15.00%	\$1,408,222	\$368	3,831	\$687	2,048
Alcohol Away from Home	\$933,043	12.00%	\$111,965	\$487	230	\$625	179
Snacks & Non-Alcoholic Beverages	\$1,346,660	8.00%	\$107,733	\$328	328	\$704	153
F&B SUBTOTAL			\$3,063,267		8,995		4,525
Home Furnishings	\$9,974,903	3.00%	\$299,247	\$188	1,589	\$335	894
Apparel	\$15,688,589	3.00%	\$470,658	\$222	2,122	\$566	831
Electronics	\$5,944,542	3.00%	\$178,336	\$794	225	\$958	186
Sports Equipment	\$1,866,086	3.00%	\$55,983	\$190	295	\$320	175
Books, Music & Other	\$673,330	4.00%	\$26,933	\$152	177	\$364	74
Pet Supplies	\$894,567	3.00%	\$26,837	\$187	144	\$303	89
Automotive Equipment	\$1,375,517	4.00%	\$55,021	\$177	311	\$252	218
GAFO SUBTOTAL			\$1,113,014		4,861		2,468
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$14,213,515		56,479		23,923

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$475,766,458	1.00%	\$4,757,665	\$216	22,016	\$534	8,911
Alcohol at Home	\$23,743,644	1.00%	\$237,436	\$328	724	\$414	574
Personal/Household Care Goods and Services	\$536,912,724	1.00%	\$5,369,127	\$260	20,666	\$716	7,497
Pet Food & Services	\$20,679,948	0.75%	\$155,100	\$187	830	\$303	512
NG&S SUBTOTAL			\$10,519,328		44,236		17,493
Full-Service	\$99,953,082	1.50%	\$1,499,296	\$312	4,811	\$669	2,240
Fast Food	\$108,761,208	0.50%	\$543,806	\$368	1,480	\$687	791
Alcohol Away from Home	\$15,701,442	1.00%	\$157,014	\$487	322	\$625	251
Snacks & Non-Alcoholic Beverages	\$14,552,556	0.25%	\$36,381	\$328	111	\$704	52
F&B SUBTOTAL			\$2,236,498		6,723		3,334
Home Furnishings	\$142,589,518	0.75%	\$1,069,421	\$188	5,678	\$335	3,196
Apparel	\$174,885,980	0.75%	\$1,311,645	\$222	5,914	\$566	2,317
Electronics	\$80,039,058	0.75%	\$600,293	\$794	756	\$958	627
Sports Equipment	\$20,169,332	0.75%	\$151,270	\$190	797	\$320	473
Books, Music & Other	\$12,127,130	0.75%	\$90,953	\$152	597	\$364	250
Pet Supplies	\$11,744,168	0.75%	\$88,081	\$187	471	\$303	291
Automotive Equipment	\$17,871,560	0.75%	\$134,037	\$177	757	\$252	532
GAFO SUBTOTAL			\$3,445,701		14,970		7,684
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$16,201,527		65,929		28,511

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$18,562,869	85,899	34,768
Alcohol at Home	\$852,414	2,599	2,059
Personal/Household Care Goods and Services	\$18,236,025	70,193	25,462
Pet Food & Services	\$549,438	2,940	1,813
NG&S SUBTOTAL	\$38,200,746	161,631	64,102
Full-Service	\$4,007,012	12,857	5,986
Fast Food	\$3,978,453	10,824	5,787
Alcohol Away from Home	\$422,212	866	676
Snacks & Non-Alcoholic Beverages	\$458,398	1,396	652
F&B SUBTOTAL	\$8,866,076	25,944	13,101
Home Furnishings	\$1,797,720	9,545	5,372
Apparel	\$2,438,598	10,995	4,307
Electronics	\$1,036,727	1,306	1,082
Sports Equipment	\$283,973	1,495	887
Books, Music & Other	\$145,406	955	400
Pet Supplies	\$152,862	818	504
Automotive Equipment	\$246,181	1,390	977
GAFO SUBTOTAL	\$6,101,467	26,503	13,530
TOTAL RESIDENT-GENERATED RETAIL DEMAND:		214,077	90,733

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,713,507	45.00%	\$771,078	\$216	3,568	\$534	1,444
Alcohol at Home	\$64,914	45.00%	\$29,211	\$328	89	\$414	71
Personal/Household Care Goods and Services	\$2,969,352	45.00%	\$1,336,208	\$260	5,143	\$716	1,866
NG&S SUBTOTAL	\$4,747,773		\$2,136,498		8,800		3,380
Full-Service	\$747,244	50.00%	\$373,622	\$312	1,199	\$669	558
Fast Food	\$795,812	45.00%	\$358,115	\$368	974	\$687	521
F&B SUBTOTAL	\$1,543,056		\$731,737		2173		1079
Home Furnishings	\$162,285	3.00%	\$4,869	\$188	26	\$335	15
Apparel	\$2,571,193	3.50%	\$89,992	\$222	406	\$566	159
Electronics	\$637,459	2.00%	\$12,749	\$794	16	\$958	13
Sports Equipment	\$486,754	3.00%	\$14,603	\$190	77	\$320	46
Books, Music & Other	\$572,819	4.00%	\$22,913	\$152	150	\$364	63
GAFO SUBTOTAL	\$4,430,510		\$145,125		675		295
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$3,013,360		11,649		4,755

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$705,609	45.00%	\$317,524	\$216	1,469	\$534	595
Alcohol at Home	\$11,643	45.00%	\$5,239	\$328	16	\$414	13
Personal/Household Care Goods and Services	\$864,110	45.00%	\$388,850	\$260	1,497	\$716	543
NG&S SUBTOTAL	\$1,581,362		\$711,613		2,982		1,150
Full-Service	\$338,768	50.00%	\$169,384	\$312	544	\$669	253
Fast Food	\$422,522	50.00%	\$211,261	\$368	575	\$687	307
F&B SUBTOTAL	\$761,290		\$380,645		1118		560
Home Furnishings	\$29,107	4.00%	\$1,164	\$188	6	\$335	3
Apparel	\$883,258	5.00%	\$44,163	\$222	199	\$566	78
Electronics	\$135,309	2.00%	\$2,706	\$794	3	\$958	3
Sports Equipment	\$84,360	4.00%	\$3,374	\$190	18	\$320	11
Books, Music & Other	\$199,356	5.00%	\$9,968	\$152	65	\$364	27
GAFO SUBTOTAL	\$1,331,390		\$61,376		292		122
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,153,633		4,392		1,833

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$804,704	30.00%	\$241,411	\$216	1,117	\$534	452
Alcohol at Home	\$26,807	30.00%	\$8,042	\$328	25	\$414	19
Personal/Household Care Goods and Services	\$374,536	30.00%	\$112,361	\$260	432	\$716	157
NG&S SUBTOTAL	\$1,206,047		\$361,814		1,574		628
Full-Service	\$242,296	40.00%	\$96,918	\$312	311	\$669	145
Fast Food	\$274,941	45.00%	\$123,723	\$368	337	\$687	180
F&B SUBTOTAL	\$517,237		\$220,642		648		325
Home Furnishings	\$67,019	2.00%	\$1,340	\$188	7	\$335	4
Apparel	\$592,272	2.50%	\$14,807	\$222	67	\$566	26
Electronics	\$69,784	1.50%	\$1,047	\$794	1	\$958	1
Sports Equipment	\$25,926	2.00%	\$519	\$190	3	\$320	2
Books, Music & Other	\$116,245	3.00%	\$3,487	\$152	23	\$364	10
GAFO SUBTOTAL	\$871,246		\$21,200		101		42
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$603,656		2,323		996

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$1,330,013	6,155	2,491
Alcohol at Home	\$42,493	130	103
Personal/Household Care Goods and Services	\$1,837,419	7,072	2,566
NG&S SUBTOTAL	\$3,209,925	13,357	5,159
Full-Service	\$639,924	2,053	956
Fast Food	\$693,100	1,886	1,008
F&B SUBTOTAL	\$1,333,024	3,939	1,964
Home Furnishings	\$7,373	39	22
Apparel	\$148,961	672	263
Electronics	\$16,502	21	17
Sports Equipment	\$18,496	97	58
Books, Music & Other	\$36,368	239	100
GAFO SUBTOTAL	\$227,700	1,068	460
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$4,770,649	18,363	7,584

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - WEST VERNOR CORRIDOR - MEXICANTOWN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$19,892,882	92,054	37,260
Alcohol at Home	\$894,907	2,728	2,162
Personal/Household Care Goods and Services	\$20,073,443	77,265	28,028
Pet Food & Services	\$549,438	2,940	1,813
NG&S SUBTOTAL	\$41,410,670	174,987	69,262
Full-Service	\$4,646,937	14,911	6,942
Fast Food	\$4,671,553	12,710	6,795
Alcohol Away from Home	\$422,212	866	676
Snacks & Non-Alcoholic Beverages	\$458,398	1,396	652
F&B SUBTOTAL	\$6,329,167	27,571	13,990
Home Furnishings	\$1,805,094	9,584	5,394
Apparel	\$2,587,559	11,666	4,570
Electronics	\$1,053,230	1,326	1,100
Sports Equipment	\$302,469	1,593	945
Books, Music & Other	\$181,774	1,194	500
Pet Supplies	\$152,862	818	504
Automotive Equipment	\$246,181	1,390	977
GAFO SUBTOTAL	\$11,184,425	48,298	23,674
TOTAL GENERATED RETAIL DEMAND:	\$57,938,937	232,441	98,317

Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC), STR, Hotels.com, Detroit Convention & Visitors Bureau (2017)

Note: Because visitor-based demand data is only available at the category level (NG&S, F&B, GAFO), subcategories cannot be summed.

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (\$F)	Retail Sales per SF	Total Demand (\$F)
Food At Home	\$23,979,699	50.00%	\$11,989,850	\$216	55,483	\$534	22,457
Alcohol at Home	\$999,378	50.00%	\$499,689	\$328	1,523	\$414	1,207
Personal/Household Care Goods and Services	\$21,620,952	50.00%	\$10,810,476	\$260	41,611	\$716	15,094
Pet Food & Services	\$854,307	45.00%	\$384,438	\$187	2,057	\$303	1,268
NG&S SUBTOTAL			\$23,684,453		100,674		40,027
Full-Service	\$4,524,066	45.00%	\$2,035,830	\$312	6,532	\$669	3,042
Fast Food	\$5,281,659	50.00%	\$2,640,830	\$368	7,185	\$687	3,841
Alcohol Away from Home	\$526,554	40.00%	\$210,622	\$487	432	\$625	337
Snacks & Non-Alcoholic Beverages	\$773,712	40.00%	\$309,485	\$328	942	\$704	440
F&B SUBTOTAL			\$5,196,766		15,092		7,660
Home Furnishings	\$5,528,817	8.00%	\$442,305	\$188	2,348	\$335	1,322
Apparel	\$8,972,910	8.00%	\$717,833	\$222	3,236	\$566	1,268
Electronics	\$3,336,633	8.00%	\$266,931	\$794	336	\$958	279
Sports Equipment	\$1,074,600	8.00%	\$85,968	\$190	453	\$320	269
Books, Music & Other	\$397,602	8.00%	\$31,808	\$152	209	\$364	87
Pet Supplies	\$499,689	8.00%	\$39,975	\$187	214	\$303	132
Automotive Equipment	\$741,474	8.00%	\$59,318	\$177	335	\$252	235
GAFO SUBTOTAL			\$1,644,138		7,131		3,592
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$30,525,356		122,897		51,278

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (\$F)	Retail Sales per SF	Total Demand (\$F)
Food At Home	\$257,369,080	15.00%	\$38,605,362	\$216	178,646	\$534	72,308
Alcohol at Home	\$12,467,075	15.00%	\$1,870,061	\$328	5,701	\$414	4,517
Personal/Household Care Goods and Services	\$275,066,245	15.00%	\$41,259,937	\$260	158,814	\$716	57,610
Pet Food & Services	\$10,825,070	12.00%	\$1,299,008	\$187	6,950	\$303	4,286
NG&S SUBTOTAL			\$83,034,368		350,112		138,721
Full-Service	\$58,139,140	15.00%	\$8,720,871	\$312	27,983	\$669	13,029
Fast Food	\$56,010,615	17.00%	\$9,521,805	\$368	25,906	\$687	13,851
Alcohol Away from Home	\$7,297,800	15.00%	\$1,094,670	\$487	2,246	\$625	1,753
Snacks & Non-Alcoholic Beverages	\$8,514,100	15.00%	\$1,277,115	\$328	3,889	\$704	1,815
F&B SUBTOTAL			\$20,614,461		60,024		30,447
Home Furnishings	\$76,809,345	3.00%	\$2,304,280	\$188	12,234	\$335	6,886
Apparel	\$93,533,470	3.00%	\$2,806,004	\$222	12,651	\$566	4,956
Electronics	\$38,982,415	3.00%	\$1,169,472	\$794	1,473	\$958	1,221
Sports Equipment	\$11,615,665	3.00%	\$348,470	\$190	1,835	\$320	1,089
Books, Music & Other	\$5,959,870	4.00%	\$238,395	\$152	1,565	\$364	655
Pet Supplies	\$6,263,945	3.00%	\$187,918	\$187	1,005	\$303	620
Automotive Equipment	\$9,852,030	4.00%	\$394,081	\$177	2,226	\$252	1,564
GAFO SUBTOTAL			\$7,448,621		32,989		16,991
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$111,097,450		443,125		186,159

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$192,404,492	3.50%	\$6,734,157	\$216	31,162	\$534	12,613
Alcohol at Home	\$9,522,832	3.50%	\$333,299	\$328	1,016	\$414	805
Personal/Household Care Goods and Services	\$215,778,716	3.00%	\$6,473,361	\$260	24,917	\$716	9,038
Pet Food & Services	\$8,224,264	2.50%	\$205,607	\$187	1,100	\$303	678
NG&S SUBTOTAL			\$13,746,424		58,195		23,135
Full-Service	\$36,955,081	7.00%	\$2,586,856	\$312	8,301	\$669	3,865
Fast Food	\$45,666,308	5.00%	\$2,283,315	\$368	6,212	\$687	3,321
Alcohol Away from Home	\$6,709,268	3.00%	\$201,278	\$487	413	\$625	322
Snacks & Non-Alcoholic Beverages	\$5,627,128	3.00%	\$168,814	\$328	514	\$704	240
F&B SUBTOTAL			\$5,240,263		15,440		7,748
Home Furnishings	\$55,513,782	0.75%	\$416,353	\$188	2,211	\$335	1,244
Apparel	\$72,395,166	0.75%	\$542,964	\$222	2,448	\$566	959
Electronics	\$34,033,303	0.75%	\$255,250	\$794	321	\$958	266
Sports Equipment	\$7,899,622	0.75%	\$59,247	\$190	312	\$320	185
Books, Music & Other	\$5,140,165	0.75%	\$38,551	\$152	253	\$364	106
Pet Supplies	\$4,653,202	0.75%	\$34,899	\$187	187	\$303	115
Automotive Equipment	\$7,033,910	0.75%	\$52,754	\$177	298	\$252	209
GAFO SUBTOTAL			\$1,400,019		6,030		3,085
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$20,386,706		79,665		33,969

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$57,329,369	265,291	107,378
Alcohol at Home	\$2,703,049	8,241	6,529
Personal/Household Care Goods and Services	\$58,543,774	225,342	81,742
Pet Food & Services	\$1,889,053	10,107	6,232
NG&S SUBTOTAL	\$120,465,245	508,981	201,882
Full-Service	\$13,343,556	42,816	19,935
Fast Food	\$14,445,949	39,303	21,014
Alcohol Away from Home	\$1,506,570	3,091	2,412
Snacks & Non-Alcoholic Beverages	\$1,755,414	5,345	2,495
F&B SUBTOTAL	\$31,051,489	90,556	45,856
Home Furnishings	\$3,162,939	16,793	9,451
Apparel	\$4,066,801	18,335	7,183
Electronics	\$1,691,653	2,130	1,766
Sports Equipment	\$493,685	2,600	1,542
Books, Music & Other	\$308,754	2,027	849
Pet Supplies	\$262,792	1,406	867
Automotive Equipment	\$506,153	2,859	2,009
GAFO SUBTOTAL	\$10,492,778	46,150	23,667
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$162,009,512	645,687	271,405

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,637,505	45.00%	\$736,877	\$216	3,410	\$534	1,380
Alcohol at Home	\$62,035	45.00%	\$27,916	\$328	85	\$414	67
Personal/Household Care Goods and Services	\$2,837,647	45.00%	\$1,276,941	\$260	4,915	\$716	1,783
NG&S SUBTOTAL	\$4,537,187		\$2,041,734		8,410		3,231
Full-Service	\$714,100	50.00%	\$357,050	\$312	1,146	\$669	533
Fast Food	\$760,514	45.00%	\$342,231	\$368	931	\$687	498
F&B SUBTOTAL	\$1,474,614		\$699,281		2077		1031
Home Furnishings	\$155,087	8.00%	\$12,407	\$188	66	\$335	37
Apparel	\$2,457,148	8.00%	\$196,572	\$222	886	\$566	347
Electronics	\$609,185	8.00%	\$48,735	\$794	61	\$958	51
Sports Equipment	\$465,164	8.00%	\$37,213	\$190	196	\$320	116
Books, Music & Other	\$547,411	8.00%	\$43,793	\$152	288	\$364	120
GAFO SUBTOTAL	\$4,233,996		\$338,720		1,497		672
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$3,079,735		11,984		4,934

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$638,447	45.00%	\$287,301	\$216	1,329	\$534	538
Alcohol at Home	\$10,534	45.00%	\$4,741	\$328	14	\$414	11
Personal/Household Care Goods and Services	\$781,862	45.00%	\$351,838	\$260	1,354	\$716	491
NG&S SUBTOTAL	\$1,430,844		\$643,880		2,698		1,041
Full-Service	\$323,742	50.00%	\$161,871	\$312	519	\$669	242
Fast Food	\$382,305	50.00%	\$191,153	\$368	520	\$687	278
F&B SUBTOTAL	\$706,047		\$353,024		1039		520
Home Furnishings	\$26,336	6.00%	\$1,580	\$188	8	\$335	5
Apparel	\$799,187	6.00%	\$47,951	\$222	216	\$566	85
Electronics	\$122,430	6.00%	\$7,346	\$794	9	\$958	8
Sports Equipment	\$76,330	6.00%	\$4,580	\$190	24	\$320	14
Books, Music & Other	\$180,381	6.00%	\$10,823	\$152	71	\$364	30
GAFO SUBTOTAL	\$1,204,665		\$72,280		329		141
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,069,183		4,067		1,702

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$1,962,242	30.00%	\$588,673	\$216	2,724	\$534	1,103
Alcohol at Home	\$74,337	30.00%	\$22,301	\$328	68	\$414	54
Personal/Household Care Goods and Services	\$3,400,387	30.00%	\$1,020,116	\$260	3,927	\$716	1,424
NG&S SUBTOTAL	\$5,436,966		\$1,631,090		6,719		2,581
Full-Service	\$855,715	40.00%	\$342,286	\$312	1,098	\$669	511
Fast Food	\$911,333	35.00%	\$318,967	\$368	868	\$687	464
F&B SUBTOTAL	\$1,767,048		\$661,253		1966		975
Home Furnishings	\$185,843	3.00%	\$5,575	\$188	30	\$335	17
Apparel	\$2,944,431	3.00%	\$88,333	\$222	398	\$566	156
Electronics	\$729,994	3.00%	\$21,900	\$794	28	\$958	23
Sports Equipment	\$557,411	3.00%	\$16,722	\$190	88	\$320	52
Books, Music & Other	\$655,970	5.00%	\$32,798	\$152	215	\$364	90
GAFO SUBTOTAL	\$5,073,649		\$165,329		759		338
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$2,457,671		9,444		3,894

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$1,612,851	7,463	3,021
Alcohol at Home	\$54,957	168	133
Personal/Household Care Goods and Services	\$2,648,895	10,196	3,699
NG&S SUBTOTAL	\$4,316,704	17,827	6,852
Full-Service	\$861,207	2,763	1,287
Fast Food	\$852,350	2,319	1,240
F&B SUBTOTAL	\$1,713,557	5,082	2,527
Home Furnishings	\$19,562	104	58
Apparel	\$332,856	1,501	588
Electronics	\$77,980	98	81
Sports Equipment	\$58,515	308	183
Books, Music & Other	\$87,414	574	240
GAFO SUBTOTAL	\$576,328	2,585	1,151
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$6,606,589	25,494	10,530

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - WEST VERNOR CORRIDOR - SPRINGWELLS

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$58,942,220	272,754	110,399
Alcohol at Home	\$2,758,007	8,409	6,662
Personal/Household Care Goods and Services	\$61,192,670	235,538	85,441
Pet Food & Services	\$1,889,053	10,107	6,232
NG&S SUBTOTAL	\$124,781,949	526,808	208,734
Full-Service	\$14,204,763	45,579	21,222
Fast Food	\$15,298,300	41,622	22,254
Alcohol Away from Home	\$1,506,570	3,091	2,412
Snacks & Non-Alcoholic Beverages	\$1,755,414	5,345	2,495
F&B SUBTOTAL	\$32,765,046	95,638	48,382
Home Furnishings	\$3,182,502	16,897	9,510
Apparel	\$4,399,657	19,836	7,770
Electronics	\$1,769,633	2,228	1,847
Sports Equipment	\$552,200	2,908	1,725
Books, Music & Other	\$396,168	2,601	1,089
Pet Supplies	\$262,792	1,406	867
Automotive Equipment	\$506,153	2,859	2,009
GAFO SUBTOTAL	\$11,069,106	48,735	24,818
TOTAL GENERATED RETAIL DEMAND:	\$168,616,102	671,181	281,935

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC)

RESIDENT-GENERATED RETAIL DEMAND WITHIN PRIMARY TRADE AREA (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$42,552,367	40.00%	\$17,020,947	\$216	78,764	\$534	31,880
Alcohol at Home	\$1,723,848	40.00%	\$689,539	\$328	2,102	\$414	1,666
Personal/Household Care Goods and Services	\$40,777,214	40.00%	\$16,310,886	\$260	62,782	\$716	22,774
Pet Food & Services	\$1,600,716	40.00%	\$640,286	\$187	3,426	\$303	2,112
NG&S SUBTOTAL			\$34,661,658		147,075		58,433
Full-Service	\$7,254,527	30.00%	\$2,176,358	\$312	6,983	\$669	3,251
Fast Food	\$9,060,463	35.00%	\$3,171,162	\$368	8,628	\$687	4,613
Alcohol Away from Home	\$1,067,144	30.00%	\$320,143	\$487	657	\$625	513
Snacks & Non-Alcoholic Beverages	\$1,251,842	30.00%	\$375,553	\$328	1,144	\$704	534
F&B SUBTOTAL			\$6,043,216		17,412		8,911
Home Furnishings	\$11,040,836	5.00%	\$552,042	\$188	2,931	\$335	1,650
Apparel	\$15,586,459	5.00%	\$779,323	\$222	3,514	\$566	1,376
Electronics	\$6,228,427	5.00%	\$311,421	\$794	392	\$958	325
Sports Equipment	\$1,785,414	5.00%	\$89,271	\$190	470	\$320	279
Books, Music & Other	\$851,663	5.00%	\$42,583	\$152	280	\$364	117
Pet Supplies	\$944,012	5.00%	\$47,201	\$187	253	\$303	156
Automotive Equipment	\$1,508,367	5.00%	\$75,418	\$177	426	\$252	299
GAFO SUBTOTAL			\$1,897,259		8,265		4,202
RESIDENT-GENERATED RETAIL DEMAND (PTA):			\$42,602,133		172,751		71,545

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN SECONDARY TRADE AREA (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$25,709,305	20.00%	\$5,141,861	\$216	23,794	\$534	9,631
Alcohol at Home	\$1,042,190	20.00%	\$208,438	\$328	635	\$414	503
Personal/Household Care Goods and Services	\$25,123,805	20.00%	\$5,024,761	\$260	19,341	\$716	7,016
Pet Food & Services	\$936,800	20.00%	\$187,360	\$187	1,002	\$303	618
NG&S SUBTOTAL			\$10,562,420		44,773		17,768
Full-Service	\$4,584,465	15.00%	\$687,670	\$312	2,207	\$669	1,027
Fast Food	\$5,328,050	15.00%	\$799,208	\$368	2,174	\$687	1,163
Alcohol Away from Home	\$655,760	15.00%	\$98,364	\$487	202	\$625	157
Snacks & Non-Alcoholic Beverages	\$778,715	15.00%	\$116,807	\$328	356	\$704	166
F&B SUBTOTAL			\$1,702,049		4,938		2,513
Home Furnishings	\$6,651,280	5.00%	\$332,564	\$188	1,766	\$335	994
Apparel	\$9,537,795	5.00%	\$476,890	\$222	2,150	\$566	842
Electronics	\$3,665,230	5.00%	\$183,262	\$794	231	\$958	191
Sports Equipment	\$1,112,450	5.00%	\$55,623	\$190	293	\$320	174
Books, Music & Other	\$567,935	5.00%	\$28,397	\$152	186	\$364	78
Pet Supplies	\$550,370	6.00%	\$33,022	\$187	177	\$303	109
Automotive Equipment	\$907,525	5.00%	\$45,376	\$177	256	\$252	180
GAFO SUBTOTAL			\$1,155,133		5,059		2,568
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$13,419,601		54,770		22,850

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

RESIDENT-GENERATED RETAIL DEMAND WITHIN TERTIARY TRADE AREA (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$64,277,658	8.00%	\$5,142,213	\$216	23,796	\$534	9,631
Alcohol at Home	\$2,933,631	8.00%	\$234,690	\$328	716	\$414	567
Personal/Household Care Goods and Services	\$70,472,700	8.00%	\$5,637,816	\$260	21,701	\$716	7,872
Pet Food & Services	\$2,671,407	8.00%	\$213,713	\$187	1,143	\$303	705
NG&S SUBTOTAL			\$11,228,432		47,355		18,775
Full-Service	\$12,308,139	6.00%	\$738,488	\$312	2,370	\$669	1,103
Fast Food	\$14,176,485	6.00%	\$850,589	\$368	2,314	\$687	1,237
Alcohol Away from Home	\$1,966,680	6.00%	\$118,001	\$487	242	\$625	189
Snacks & Non-Alcoholic Beverages	\$1,884,735	6.00%	\$113,084	\$328	344	\$704	161
F&B SUBTOTAL			\$1,820,162		5,270		2,690
Home Furnishings	\$18,519,570	1.00%	\$185,196	\$188	983	\$335	553
Apparel	\$24,108,219	1.00%	\$241,082	\$222	1,087	\$566	426
Electronics	\$10,243,125	1.00%	\$102,431	\$794	129	\$958	107
Sports Equipment	\$2,802,519	1.00%	\$28,025	\$190	148	\$320	88
Books, Music & Other	\$1,507,788	1.00%	\$15,078	\$152	99	\$364	41
Pet Supplies	\$1,524,177	1.00%	\$15,242	\$187	82	\$303	50
Automotive Equipment	\$2,425,572	1.00%	\$24,256	\$177	137	\$252	96
GAFO SUBTOTAL			\$611,310		2,664		1,362
RESIDENT-GENERATED RETAIL DEMAND (STA):			\$13,659,904		55,290		22,827

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

SUMMARY OF RESIDENT GENERATED RETAIL DEMAND (2017) - WEST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$27,305,020	126,354	51,143
Alcohol at Home	\$1,132,668	3,453	2,736
Personal/Household Care Goods and Services	\$26,973,463	103,824	37,662
Pet Food & Services	\$1,041,359	5,572	3,436
NG&S SUBTOTAL	\$56,452,510	239,203	94,976
Full-Service	\$3,602,516	11,559	5,382
Fast Food	\$4,820,959	13,116	7,013
Alcohol Away from Home	\$536,508	1,101	859
Snacks & Non-Alcoholic Beverages	\$605,444	1,844	860
F&B SUBTOTAL	\$9,565,427	27,620	14,114
Home Furnishings	\$1,069,802	5,680	3,197
Apparel	\$1,497,295	6,751	2,644
Electronics	\$597,114	752	623
Sports Equipment	\$172,918	911	540
Books, Music & Other	\$86,058	565	237
Pet Supplies	\$95,465	511	315
Automotive Equipment	\$145,050	819	576
GAFO SUBTOTAL	\$3,663,702	15,988	8,132
TOTAL RESIDENT-GENERATED RETAIL DEMAND:	\$69,681,638	282,811	117,223

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, EXECUTIVE AND PROFESSIONAL (PTA) (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$2,381,982	45.00%	\$1,071,892	\$216	4,960	\$534	2,008
Alcohol at Home	\$90,239	45.00%	\$40,607	\$328	124	\$414	98
Personal/Household Care Goods and Services	\$4,127,759	45.00%	\$1,857,491	\$260	7,150	\$716	2,594
NG&S SUBTOTAL	\$6,599,979		\$2,969,991		12,234		4,699
Full-Service	\$1,038,759	50.00%	\$519,380	\$312	1,667	\$669	776
Fast Food	\$1,106,275	45.00%	\$497,824	\$368	1,354	\$687	724
F&B SUBTOTAL	\$2,145,035		\$1,017,203		3021		1500
Home Furnishings	\$225,596	5.00%	\$11,280	\$188	60	\$335	34
Apparel	\$3,574,269	5.00%	\$178,713	\$222	806	\$566	316
Electronics	\$886,145	5.00%	\$44,307	\$794	56	\$958	46
Sports Equipment	\$676,647	5.00%	\$33,832	\$190	178	\$320	106
Books, Music & Other	\$796,287	5.00%	\$39,814	\$152	261	\$364	109
GAFO SUBTOTAL	\$6,158,945		\$307,947		1,361		611
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$4,295,141		16,616		6,810

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, ADMINISTRATIVE/SUPPORT/RETAIL/GOVERNMENT (PTA) (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$707,267	45.00%	\$318,270	\$216	1,473	\$534	596
Alcohol at Home	\$11,670	45.00%	\$5,252	\$328	16	\$414	13
Personal/Household Care Goods and Services	\$866,141	45.00%	\$389,764	\$260	1,500	\$716	544
NG&S SUBTOTAL	\$1,585,078		\$713,285		2,989		1,153
Full-Service	\$470,929	50.00%	\$235,464	\$312	756	\$669	352
Fast Food	\$423,515	50.00%	\$211,757	\$368	576	\$687	308
F&B SUBTOTAL	\$894,443		\$447,222		1332		660
Home Furnishings	\$29,175	6.00%	\$1,751	\$188	9	\$335	5
Apparel	\$885,334	6.00%	\$53,120	\$222	239	\$566	94
Electronics	\$135,627	6.00%	\$8,138	\$794	10	\$958	8
Sports Equipment	\$84,558	6.00%	\$5,073	\$190	27	\$320	16
Books, Music & Other	\$199,825	6.00%	\$11,989	\$152	79	\$364	33
GAFO SUBTOTAL	\$1,334,519		\$80,071		364		156
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$1,240,578		4,685		1,969

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

WORKPLACE-BASED RETAIL DEMAND, TRADE AND LABOR (PTA) (2017) - WEST WARREN

Category	Total Expenditures	Capture Rate	Total Captured Expenditures	Low Productivity		High Productivity	
				Retail Sales per SF	Total Demand (SF)	Retail Sales per SF	Total Demand (SF)
Food At Home	\$988,752	30.00%	\$296,626	\$216	1,373	\$534	556
Alcohol at Home	\$32,939	30.00%	\$9,882	\$328	30	\$414	24
Personal/Household Care Goods and Services	\$460,197	30.00%	\$138,059	\$260	531	\$716	193
NG&S SUBTOTAL	\$1,481,888		\$444,566		1,934		772
Full-Service	\$297,712	35.00%	\$104,199	\$312	334	\$669	156
Fast Food	\$337,824	30.00%	\$101,347	\$368	276	\$687	147
F&B SUBTOTAL	\$635,536		\$205,546		610		303
Home Furnishings	\$82,347	3.00%	\$2,470	\$188	13	\$335	7
Apparel	\$727,733	3.00%	\$21,832	\$222	98	\$566	39
Electronics	\$85,744	3.00%	\$2,572	\$794	3	\$958	3
Sports Equipment	\$31,856	3.00%	\$956	\$190	5	\$320	3
Books, Music & Other	\$142,832	3.00%	\$4,285	\$152	28	\$364	12
GAFO SUBTOTAL	\$1,070,512		\$32,115		148		63
WORKPLACE-GENERATED RETAIL DEMAND (PTA):			\$682,228		2,692		1,139

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF WORKPLACE-BASED RETAIL DEMAND (PTA) (2017) - WEST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$1,686,788	7,806	3,159
Alcohol at Home	\$55,740	170	135
Personal/Household Care Goods and Services	\$2,385,314	9,181	3,331
NG&S SUBTOTAL	\$4,127,842	17,157	6,625
Full-Service	\$859,043	2,756	1,283
Fast Food	\$810,928	2,206	1,180
F&B SUBTOTAL	\$1,669,971	4,963	2,463
Home Furnishings	\$15,501	82	46
Apparel	\$253,665	1,144	448
Electronics	\$55,017	69	57
Sports Equipment	\$39,862	210	125
Books, Music & Other	\$56,089	368	154
GAFO SUBTOTAL	\$420,134	1,873	831
WORKPLACE-GENERATED RETAIL DEMAND (PTA):	\$6,217,947	23,993	9,918

Source: Streetsense, International Council of Shopping Centers (ICSC), Sitewise, Nielsen, US Bureau of Labor Statistics (2017).

SUMMARY OF TOTAL RETAIL DEMAND (2017) - WEST WARREN

Category	Total Captured Expenditures	Total Demand Low Productivity (SF)	Total Demand High Productivity (SF)
Food At Home	\$28,991,808	134,159	54,302
Alcohol at Home	\$1,188,408	3,623	2,871
Personal/Household Care Goods and Services	\$29,358,777	113,005	40,992
Pet Food & Services	\$1,041,359	5,572	3,436
NG&S SUBTOTAL	\$60,580,352	256,359	101,601
Full-Service	\$4,461,559	14,316	6,666
Fast Food	\$5,631,887	15,323	8,192
Alcohol Away from Home	\$536,508	1,101	859
Snacks & Non-Alcoholic Beverages	\$605,444	1,844	860
F&B SUBTOTAL	\$11,235,398	32,583	16,577
Home Furnishings	\$1,085,302	5,762	3,243
Apparel	\$1,750,960	7,894	3,092
Electronics	\$652,131	821	681
Sports Equipment	\$212,780	1,120	665
Books, Music & Other	\$142,147	933	391
Pet Supplies	\$95,465	511	315
Automotive Equipment	\$145,050	819	576
GAFO SUBTOTAL	\$4,083,835	17,862	8,963
TOTAL GENERATED RETAIL DEMAND:	\$75,899,585	306,804	127,141

Source: Streetsense, US Postal Services, US Department of Housing and Urban Development, Sitewise, Nielsen, US Census Bureau, US Bureau of Labor Statistics (2017), International Council of Shopping Centers (ICSC)

