Layton Boulevard West Neighborhood

Commercial District Analysis

City of Milwaukee
Department of City Development

Spring 2001

Introduction

At the request of the Layton Boulevard West Neighborhood Association and Aldermen Murphy and Donovan, a market analysis and a survey of area residents were conducted to better understand the area's commercial districts. The results of these analyses will provide insight into the types of businesses that should be encouraged to locate within this area and to better understand the commercial districts' strengths and weaknesses based on statistical data and consumer opinions.

Section one of the report is a market analysis, which determines if the supply of retail stores within a trade area is meeting consumer demand for goods and services. Two different market analyses were conducted to distinguish between the trade areas for different types of businesses. The first market analysis focuses on the Layton Boulevard West Neighborhood trade area, which is bounded by National Avenue, South Layton Boulevard, Lincoln Avenue, and 43rd Street. The second market analysis incorporates a larger trade area, the Near Southside, and is bounded by National Avenue, 5th Street, Oklahoma Avenue, and 43rd Street.

Section two of the report analyzes a consumer survey that was circulated to residents in the Layton Boulevard West Neighborhood. The first part of the survey asked respondents their opinions about the business district's profile. They indicated how frequently they shop within the commercial district and identified areas that need to be improved. The second part of the survey collected demographic information from the respondents to gain a better understanding of the commercial district's customers.

Section One: Market Analysis

<u>Methodology</u>

Defining the Trade Areas

For this study, it was necessary to perform market analyses for two trade areas to convey accurate market information for different types of businesses. The first market analysis bounded by National Avenue, South Layton Boulevard, Lincoln Avenue, and 43rd Street was conducted to provide data for the smaller businesses that serve a smaller trade area. The second market analysis, bounded by National Avenue, 5th Street, Oklahoma Avenue, and 43rd Street, seeks to address the market for larger stores, which serve a larger trade area. It is important to compare the two market analyses because the results for the LBWN market analysis may indicate that the market is saturated while the Near Southside market analysis may demonstrate that the demand has not been satisfied. ***Appendix 1*** contains a map of the two trade areas.

Data Sources

The market analyses were conducted to find out if the supply of retail stores within each trade area is meeting consumers' demand for goods and services. The retail sales were calculated using data from the U.S. Census Bureau's 1997 Economic Census of Retail Trade. The demand for goods and services within the trade areas was calculated using the Consumer Expenditure Survey from the Bureau of Labor Statistics and income data from Claritas 1996 estimates. The number of local stores was obtained through site visits. Both the income and sales data were adjusted to reflect 2001 dollars using the Consumer Price Index.

Defining Market Categories

Food at Home

For this category it was necessary to make a distinction between supermarkets, specialty grocers, and corner/convenience grocers. Supermarkets have a much higher per store output, and aggregating the categories diminishes the potential market for smaller grocers. Fortunately, the Economic Census of Retail Trade charts the total receipts for Food & Beverage Stores and lists the amount taken in by supermarkets, specialty grocers, and corner/convenience grocers. From this, the percentage of money spent on "Food at home" was determined for each subcategory.

1. The Supermarkets subcategory includes all full-service grocery stores, excluding ethnic grocery stores, with output of greater than $1 million per year.
2. The Specialty Grocery subcategory includes all ethnic grocery markets, meat markets and butchers, fish markets, produce markets, and gourmet food markets.
3. The Convenience Grocery subcategory includes corner grocery markets, limited service grocery markets, and other convenience grocery markets, which are not classified as gas stations.

- Supermarkets account for 95.4% of all money spent on "Food at Home"
- Specialty/Ethnic Grocers account for 2.3% of all money spent on "Food at Home"
- Corner/Convenience Grocers account for 2.3% of all money spent on "Food at Home"

Food Away From Home

A methodology similar to the one above was used to divide "Food Away from Home" into subcategories. This is necessary because more Limited Service Restaurants exist within the 1-mile radius than Full Service Restaurants. If they were combined, the analysis would indicate that there are too many restaurants overall when, in fact, a large market exists for Full Service Restaurants.

1. The Full-Service Restaurant subcategory includes all sit-down restaurants with wait service and dinner hours.
2. The Limited-service Restaurant subcategory includes fast-food restaurants, take-out restaurants, bakeries, coffee houses, delicatessens, and limited-service cafes.

- Full Service Restaurants account for 48.5% of all money spent on “Food Away from Home.”
- Limited Service Restaurants account for 51.5% of all money spent on “Food Away from Home.”

Apparel and Accessories

Like the methodology used in the categories above, “Apparel and Accessories” was divided into the subcategories clothing stores, shoe stores, and jewelry stores to provide a more accurate market analysis.

1. The Clothing Store subcategory includes all clothing and apparel stores that are not department stores.
2. The Shoe Store subcategory includes all shoe stores that are not department stores. This includes sporting goods stores where a major portion of their business is athletic shoes.
3. The Jewelry Store subcategory includes all stores primarily engaged in the selling of jewelry. This does not include pawn stores, resale stores or department stores.

- Clothing Stores account for 59.2% of all money spent on “Apparel and Accessories.”
- Shoe Stores account for 20.5% of all money spent on “Apparel and Accessories.”
- Jewelry Stores account for 20.3% of all money spent on “Apparel and Accessories.”

Health & Personal Care Items

Due to mismatches in category definitions, manipulations were required to calculate the supply and demand for “Health & Personal Care Item” stores. The Economic Census of Retail Trade includes pharmacies, cosmetics stores, beauty supply and perfume stores, optical goods stores, and food supplement stores in the same category, “Health and Personal Care Stores.” In contrast, the Consumer Expenditure Survey divides these products between two separate categories, “Health Care” and “Personal Care Products.” To eliminate a data discrepancy, the two Consumer Expenditure categories were combined.

Another data manipulation was required because the Consumer Expenditure Survey includes health insurance premiums under the “Health Care” category and the Economic Census o f Retail Trade excludes it from the “Health & Personal Care” category. As a result, it was necessary to determine the amount of the “Health Care” category not spent on health insurance. According to the Consumer Expenditure Survey, the Midwest spends 47.8% of the “Health Care” category on health insurance, which leaves 52.2% of the category to be spent on other health care items. To find the total expenditures available for the two categories, “Health Care” and “Personal Care Products,” without health insurance, the following calculation was used:

Health Care Expenditures		Amount Spent on Health Insurance		Personal Care Expenditures		Health & Personal Care Items Category
	-		+		=	
1806		863		943		1278

The 1806 represents the total amount of the "Health Care" expenditures, the 863 is the amount of "Health Care" that is spent on health insurance premiums and the $943 represents the amount of expenditures available for the "Personal Care Products." The end result is the category called "Health and Personal Care Items."

A methodology similar to the one used for previous categories was applied to this category to estimate subcategory expenditures for "Health Care & Personal Care Products." These include: Pharmacies & Drugstores; Cosmetics, Beauty Supplies, & Perfume Stores; Optical Goods Stores; Food Supplement Stores; and Hair, Nail, & Skin Services.

1. The pharmacy subcategory includes all stores where selling prescription and non-prescription drugs is the major portion of their business. This would not include stores such as "Target" that have pharmacies.
2. The Cosmetics Subcategory includes wig stores, "Bath & Bodyworks" type shops, cosmetic stores, hair product stores, and perfume stores.
3. The Optical Goods subcategory includes all stores primarily engaged in the sale of glasses, contacts, and sunglasses.
4. The Food Supplement subcategory includes all food supplement and vitamin stores such as "GNC."
5. The Hair, Nail, & Skin Services subcategory includes all barbers, beauty salons, manicurists, and spa stores.

- Pharmacies & Drug Stores account for 77.2% of all money spent on "Health & Personal Care Products & Services."
- Cosmetics, Beauty Supplies, & Perfume Stores account for 2.4% of all money spent on "Health & Personal Care Products & Services."
- Optical Goods Stores account for 5.4% of all money spent on "Health & Personal Care Products & Services."
- Food Supplement stores account for 2.4% of all money spent on "Health & Personal Care Products & Services."
- Hair, Nail, & Skin Services account for 12.6% of all money spent on "Health & Personal Care Products & Services."

Data Limitations

This type of analysis serves as a good starting point for finding openings in the market. However, market analyses are limited in that the unique purchasing characteristics of a neighborhood can alter the results. Other external factors which can affect the market analysis include: decline and improvement in urban commercial districts, subtle differences in the real and/or perceived convenience of other commercial districts, and the manner in which purchases are made as part of a customer's daily routine.

Market Analysis Results

After analyzing the results of the *LBWN Gap in Retail Sales* and *Near Southside Gap in Retail Sales* (*See* ***Appendix 2*** *for tables)*, a number of development opportunities become apparent. The column in the appendix called "The Number of Additional Stores to Reach Capacity" demonstrates the potential or limited market for each product. A positive number indicates that a demand for additional stores may exist within the market analysis area. A negative number indicates that the market is already saturated and development should not be targeted. The following is a summary of all retail categories that were examined in the market analysis.

- Supermarkets: There is a small market opening in this category according to the LBWN analysis (*0.18*). Most of the supermarkets in this area are small and medium-sized stores with an output of $2 million or less. These types of stores generally do not attract customers from more than 3 miles away. However, the greater level of selection and generally lower prices of very large supermarkets, such as Jewel and Pick-n-Save, can attract customers from outside their primary trade area. Also, they may attract consumers from a greater distance that are not serviced by a large supermarket in their neighborhood. Results from the Near Southside market analysis, however, indicate a slightly greater supply than demand (-*.70*) for supermarkets.

- Specialty Grocery: Both analyses suggest that the supply for this type of retail is greater than area demand (-*3.54 and –18.55 respectively*). However, it is difficult to compare ethnic or other specialty groceries because they sell such specialized items. Each type of specialty grocery store fills a small niche and an Asian grocery may not be in competition with a Mexican grocery. Additionally, specialty grocers have the potential to draw customers from a very large area if similar types of grocers do not exist in the rest of the metro area. As a result, it is possible that additional specialty grocers may find a consumer market within the study area.

- Convenience Grocery: The urban market is home to a large number of small, corner grocers. Both market analyses suggested that the supply of convenience grocery stores was greater than demand within the study area. Gas stations and pharmacies, which often provide convenience type groceries, were excluded from this category because they are more appropriately placed in different categories.

- Full Service Restaurants: The LBWN analysis indicated an opening for full-service restaurants (*2.0*). The Near Southside analysis, however, indicated a greater supply than demand for these types of restaurants. Many of the restaurants in the larger market analysis are located on the Eastern edge of the Near Southside study area. As a result, a market probably exists for a restaurant that primarily serves the needs of residents within the LBWN.

- Limited Service Restaurants: The LBWN analysis indicates a substantial market opening for additional limited service restaurants (*5.05*). Niche restaurants, such as Boston Market and Schlotsky's Deli, could appropriately fill this opening. The Near Southside market analysis indicated that the market is saturated for this category (-*11.65*).

- <u>Clothing Stores</u>: Both market analyses indicate an opening for additional clothing and apparel stores within this market (*1.29 and 7.58 respectively*). This is an underserved need of the local community.

- <u>Shoe Stores</u>: There is a small market opening (0.28) in the LBWN neighborhood and a larger market opening (3.84) in the Southside study area.

- <u>Jewelry Stores</u>: There is a market opening for jewelry stores (*1.27 and 4.78 respectively*).

- <u>Pharmacies</u>: The LBWN analysis indicated that there is a small opening for additional pharmacies (*1.02*). However, the Southside analysis implied that supply is greater than demand (-*5.55*) for pharmacies. Given the average output per pharmacy (*$3,392,688*), the Southside analysis would be more appropriate.

- <u>Beauty Supply & Perfume Stores</u>: The LBWN analysis indicates a very small opening for these types of stores (*0.17*) and the Southside analysis indicates a slightly greater supply than demand (-*0.11*).

- <u>Optical Goods Stores</u>: The LBWN analysis indicates a market opening of 0.50 stores for the market area. However, the Southside indicates a greater supply than demand for optical good stores (-*3.32*).

- <u>Food Supplement Stores</u>: The LBWN analysis indicates a very small opening for these types of stores (*0.18*). However, the Southside analysis indicates a slightly greater supply than demand (-*1.06*).

- <u>Hair, Nail & Skin Services</u>: Both market analyses clearly suggested that there is a larger supply than demand for hair, skin, and nail services (*-10.54 and -19.5 respectively)*. This analysis does not propose that there are 20 too many hair, skin, and nail service establishments, merely that additional businesses of this type should not be pursued or encouraged.

- <u>Furniture & Home Furnishings</u>: Both market analyses indicate that there is a substantial market opening for furniture stores in the area (*3.57 and 10.42 respectively*). Both the immediate and larger areas are currently underserved.

<u>Market Analysis Conclusions</u>

The market analysis indicates that an opportunity exists for new developments in the Layton Boulevard West Neighborhood. Particular attention should be given to the following sectors: clothing stores, shoe stores, jewelry stores and furniture stores. Additionally, a market exists for full service restaurants and limited service restaurants.

Specialty grocery stores, convenience grocery stores, beauty supply & perfume stores, and hair, skin, & nail service stores are saturated in this market area. These establishments should not be targeted for recruitment.

The data used for this study is taken from the Consumer Expenditure Survey, which looks at household spending patterns for the Metropolitan Area. It is possible that the spending habits of the households in the study area differ from the metropolitan area as a whole. Changes in Consumer Expenditure numbers to more accurately portray the neighborhood could also alter the results of the market analysis. For example, a study by Pricewaterhouse Coopers on the tendencies of inner-city shoppers suggests that inner-city shoppers spend more on apparel than the average U.S. household.

Section Two of the report is a survey analysis. It should be used in conjunction with the market analysis to help the City of Milwaukee, the Aldermen, and Layton Boulevard West Neighborhood pinpoint the types of retail stores that the study area desires. Also, it will provide them with more ammunition for attracting retailers to the area.

Section Two: Consumer Survey

Methodology

Approximately 6,000 questionnaires were mailed to residents living in the Layton Boulevard West Neighborhood. By the due date, 535 usable surveys were returned to the Department of City Development. Each survey was assigned a number and the answers for each survey were coded into a spreadsheet. Then, mean, frequency and cross-tabulation analyses were performed to summarize the data. The survey results are divided between the business district profile and the consumer profile below.

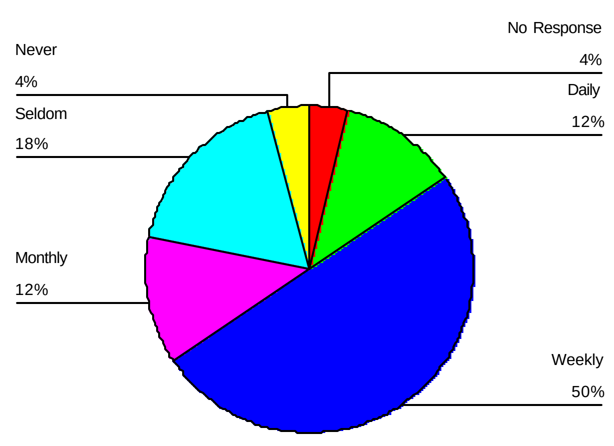
Business District Profile Results

The business district profile section of the survey helps gain insight into the current state of the commercial area and what can be done to improve it. The following is a question-by-question summary of the survey responses.

1. I shop the neighborhood businesses: Daily/Weekly/Monthly/Seldom/Never

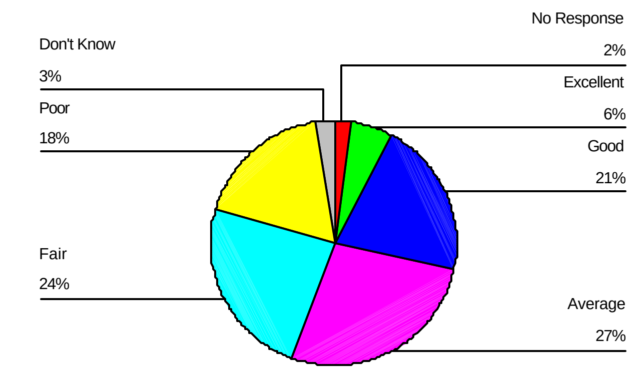
The first question asked the residents how often they shop within the LBWN commercial district. The survey results shown in *Figure 1* indicate that over 70% of the respondents shop there regularly. More specifically, 50% shop on a weekly basis, 12% shop on a daily basis, and 12% shop on a monthly basis. A total of 22% of the respondents indicated that they seldom or never shop in the area.

Figure 1: Shopping Frequency

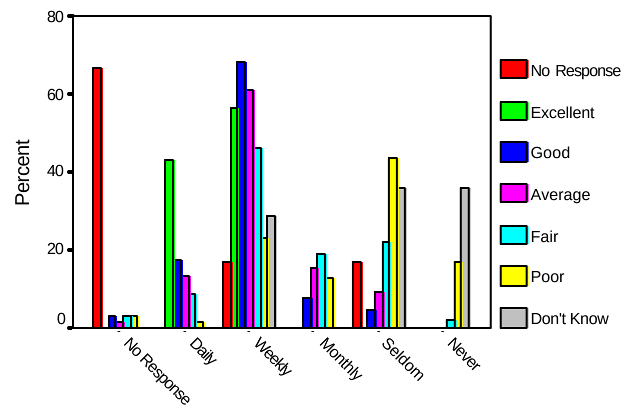


2. I would rate shopping in this area as: Excellent/Good/Average/Fair/Poor/Don't Know

Question two determines how the respondent's perceive the quality of shopping in the LBWN area. The results are shown in *Figure 2*. Despite the high utilization rates indicated in the previous question, only 6% of the respondents indicated that the area shopping is excellent. The responses for good (21%), average (27%), fair (24%), and poor (18%) are evenly distributed, indicating that the residents have mixed feeling about the quality of shopping in the area.



Answers from questions one and two were cross-tabulated to see if the use of the commercial district is related to the residents' perceptions of it. In *Figure 3*, the concentration of green, blue, and pink bars that correspond with *Daily* and *Weekly* use indicates that the people who shop frequently in the area have a relatively high perception of the commercial district. Those who shop seldom or never have substantially lower opinions about the shopping facilities in the Layton Boulevard West Neighborhood, as indicated by the concentration of yellow bars on the right side of the chart.



3. In your opinion, rank the top five items that need to be improved in the commercial areas of the neighborhood.

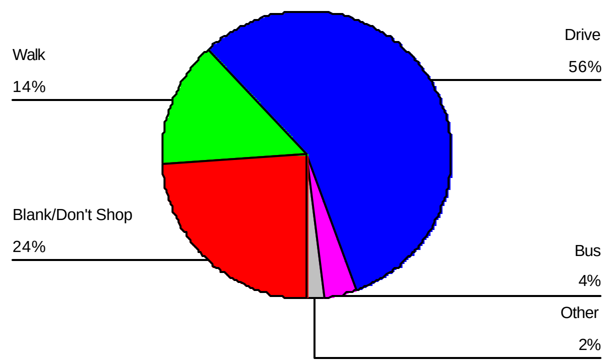
Question three asks the survey respondents what specific areas need to be improved to make the shopping in LBWN more desirable. The survey provided thirteen different categories and an "other" category for unique responses. Respondents ranked the top five most important areas that they feel need improvements. ***Appendix 3*** contains three charts that summarize the respondents' top three choices. These include:

- Most Common First Choice Answer: Store Variety
- Most Common Second Choice Answer: Appearance of Building Exteriors
- Most Common Third Choice Answer: Security

4. How do you get to your neighborhood shopping area most of the time?

Figure 4 summarizes the responses to question four, which asked the residents what primary mode of transporation they use when shopping in the commercial district. The majority of the respondents (56%) indicated that they drive to the neighborhood shopping area. Also, a significant number of people (14%) indicated that they walk to the commercial district and 4% take the bus. Twenty four percent of survey respondents indicated that they do not shop in the area or left the question blank.

Figure 4: Transportation Mode to Neighborhood Shopping



5. What additional types of businesses would you like to see open within this neighborhood?

Question five asked the respondents to rank six business types that they would like to see locate in the LBWN business district. A total of 111 survey respondents did not answer the question or did not answer it properly. Their responses for this question were not used in the results. ***Appendix 4*** contains three charts that summarize the top three business types selected by the 424 people who answered question five. The results indicate that the largest number of people requested the following business types: hardware, supermarket, bakery, sit down family restaurant, and café/deli.

6. Do you think that the neighborhood needs more housing choices?

Since the health of a commercial district is intertwined with the surrounding residential neighborhood, it is important to consider the housing needs of the community. Question six asks the respondents if more housing choices are needed in the neighborhood. The majority of the respondents (52%) do not feel additional housing choices are needed. However, the number of residents that desire more housing choices (23%) and the number of respondents who do not know (21%) if more housing choices are needed is substantial.

Figure 6 provides a chart of the types of housing that are desired by the respondents who answered yes to question six. Just over 39% of the respondents indicated they would like to see more affordable housing, 11% indicated they would like more independent/assisted living facilities, and 7% indicated they would like additional apartments in

Figure 6: Housing Choices Needed

Type	**Percent**
Independent Living	11
Affordable Housing	39
Apartments	7
Public Housing	3
Owner Occupied	4
Total Respondents	135

their neighborhood. Smaller percentages of respondents indicated they would like to have additional owner-occupied (4%) and public housing facilities (3%) in the neighborhood.

7. What other needs do you see that are underserved in your community?

Question seven was designed as an open ended question to obtain residents' concerns that were not included on the survey. The largest percentage of respondents, 35.6%, indicated they want more police patrol. Other popular responses included cleanup and repairs (17.4%), a community recreation center (12.3%), and property up-keep (12.3%). Eleven percent indicated they would like more retail choices and 11.4% indicated they would like more parking enforcement. Fifty six percent of the respondents did not answer the question.

Figure 7: Underserved Needs

Resident Requests	Percent
Police Patrol/Security	16
Community Recreation Center	5
Litter Removal/Street Repair	8
More Retail Variety	5
Property Up-Keep	5
Parking Violations Enforcement	5
No Response	56
Total Respondents	535

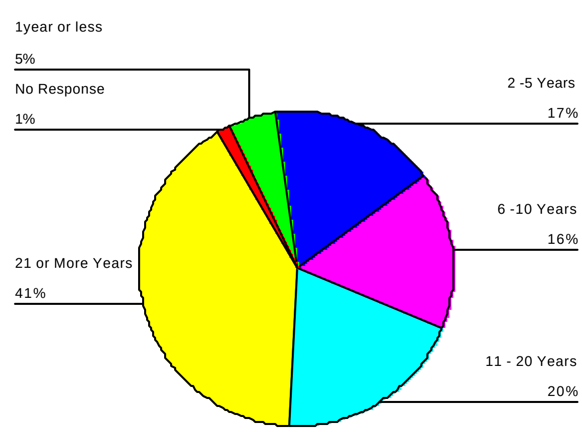
Consumer Demographic Profile Results

The remaining questions provide demographic information for the Layton Boulevard West Neighborhood. This information will be useful for attracting businesses that will meet the needs of the residents.

8. How long have you lived in this neighborhood?

This question was asked to gain a better understanding of how long residents remain in the neighborhood. The results indicate that the residents are a stable population, staying in the area for long periods of time. As shown in Figure 8, over 60% of the respondents have lived in the area eleven or more years and over three quarters of the population have lived in the area six or more years. The largest percentage of respondents, 41%, indicated they have lived in the neighborhood for more than 21 years. Only 4.7% of the respondents reported living in the neighborhood one year or less.

Figure 8: Length of Residence



9. How many people are in your household?

The next question on the survey asked the respondents to indicate their household size. As shown in *Figure 9*, 28% of the households have a single occupant, 33% have two occupants, and 17% have three occupants. A total of 17% percent of the respondents indicated they have four or more people living in their household.

Figure 9: Household Size	
People	**Percent**
1	28
2	33
3	17
4	9
5	6
6 or More	2
No Response	4
Total Respondents	535

10. How many people in your household are employed full-time or part-time?

Figure 10 shows the number of people working either part-time or full-time in each household. Thirty two percent of the households have only one member working, 30% have double wage earners, and 9% have 3 or more people in their household working part-time or full-time. Twenty eight percent of the respondents did not answer the question.

Figure 10: Household Workers	
Numer	**Percent**
1	32
2	30
3 or More	9
No Response	28
Total Respondents	535

11. Do you work within 2 miles of your home?

The survey results show that the majority of residents are employed outside of the LBWN business district. As shown in *Figure 11*, 58% of the respondents indicated that they work greater than 2 miles away from home and 24% indicated that they work within 2 miles of their home.

Figure 11: Distance Between Home and Work	
Response	**Percent**
Within 2 Miles	24
> 2 Miles	58
Don't Know	1
No Response	17
Total Respondents	535

12. What is your main mode of transportation?

Figure 12 shows that most prominent transportation mode for LBWN residents is the car, which accounts for 74% of the responses. The other significant transportation mode, the bus, accounts for 13% of the responses.

Figure 12: Main Mode of Transportation	
Type	**Percent**
Personal Vehicle	74
Bus	13
Taxi	1
Carpool	2
Other	6
No Response	3
Total Respondents	535

13. What is your gender?

Figure 13 shows the gender distribution of the respondents. Sixty three percent were female and 33% were male. This most likely is not indicative of the actual population, but a sign that females were more likely to respond to the survey.

Figure 13: Gender Composition	
Gender	**Percent**
Female	63
Male	33
No Response	4
Total Respondents	535

14. What is your age?

Figure 14 shows the age distribution of the respondents in the LBWN. The largest number of people, 34%, that responded to the survey were in the 60 and up category. The 40-49 and 50-59 age categories accounted for a total of 40% of the respondents and the 30-39 age category accounted for 13% of the respondents. This data suggests that the LBWN has a relatively older population, however, it does not accurately portray the neighborhood's age distribution. According to the 2000 U.S. Census Bureau figures, the LBWN has a relatively young population. Children, under the age of 18, comprise the largest percentage of people in the study area (32%) and adults, between the ages of 25-44 comprise the second largest percentage of people (31%). The 45-64 age category comprise 16% of the population and the 18-24 age category comprise 11% of the population. The 65 and over age group accounts for 10% of the population.

Figure 14: Age Distribution	
Range	**Percent**
19 & Under	0
20-29	7
30-39	13
40-49	20
50-59	20
60 & Up	34
No Response	6
Total Respondents	535

15. What is the highest level of educational attainment?

This survey question analyzes the resident's educational levels. *Figure 15* shows that the largest number of people, 30%, are high school graduates. Twenty two percent indicated they have some college, 11% indicated they have a bachelor's degree, and 12% indicated they have a graduate/professional degree. A total of 11% indicated they did not graduate from high school.

Figure 15: Educational Attainment	
Level	**Percent**
Less Than 9th	3
9th - 12th	8
H.S. Graduate	30
Some College	22
Associate Degree	6
Bachelor's	11
Graduate/Professional	12
No Response	7
Total Respondents	535

16. What is your race and primary spoken language at home?

According to the results shown in *Figure 16*, the survey respondents are predominately white (81%). Hispanics are the next largest category, accounting for 8% of the responses. Asian, Black, and American Indians account for a total of 4% of the survey respondents. Furthermore, 87% of the respondents reported they primarily speak English at home and 3% reported they primarily speak Spanish at home. However, these findings do not accurately portray the racial and ethnic diversity of the neighborhood. According to the 2000 U.S. Census Bureau figures, 43% of the population in the study area is Hispanic, and 42% are white. Other significant racial groups in the area include Asian/Pacific Islander (8%), African American (3%), and American Indian (2%).

Figure 16: Racial Composition	
Race	**Percent**
White	81
Hispanic	8
Asian	2
Other	2
Black	1
American Indian	1
No Response	5
Total Respondents	535

17. What is your total household annual income range?

Question nine asked the respondents their total annual household income. As shown in *Figure 17*, the largest percentage (27%) falls between the income range of $20,000 to $39,999. An additional 20% of the respondents indicated their household income is between $40,000 and $59,999 and 21% indicated their household income is less than $20,000. Twenty percent of the respondents chose not to answer the question. When compared to the 1996 average income estimate of $34,593 by Claritas for the LBWN area, these figures appear to realistically portray the incomes of the residents.

Figure 17:Annual Household Income	
Range	**Percent**
Up to $19,999	21
$20,000-$39,999	27
$40,000-$59,999	20
$60,000-$79,999	8
$80,000-$99,999	2
Over $100,000	1
No Response	20
Total Respondents	535

Survey Conclusions

The outcomes of the survey are useful to determine the health of the Layton Boulevard West Commercial District and the types of improvements that should be made. The results have demonstrated that the retail stores are highly utilized by local residents. A total of 62% of the respondents indicated that they shop in the commercial district at least weekly and another 12% said they shop on a monthly basis. Despite this information, residents have mixed feelings about how they perceive the quality of shopping in the commercial district. A total of 54% of the respondents indicated that they have an average or better opinion of the shopping in the commercial district and a total of 45% of the respondents indicated that they have a below average opinion or do not know how they feel about shopping in the commercial district.

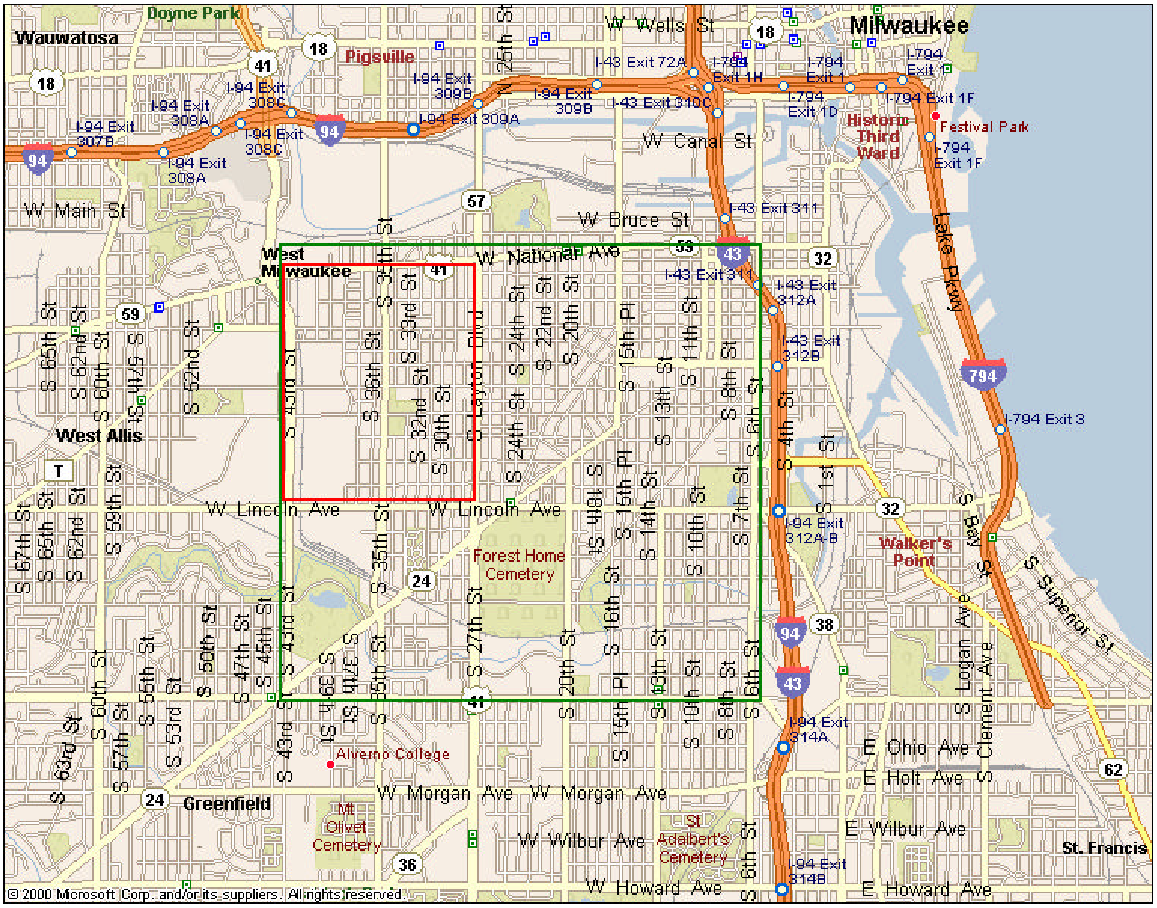
The mixed perceptions of the commercial district are most likely a result of the needed improvements that were identified by the survey respondents. The most common first, second, and third improvement requests were store variety, exterior building appearance, and security. The area would benefit from façade improvements, such as the removal of boarded up windows, new signs and awnings and freshly painted storefronts. The appearance of the streets should be improved with new plantings, decorative streetlights, bike racks and litter removal. Improvements can be achieved with the aid of façade grants, streetscape projects, and the efforts of business associations and neighborhood groups. Also, improved lighting and security personnel will help people feel safer.

Several of the businesses requested by survey respondents fit the findings of the market analysis. Some of the most frequent requests include a bakery, a sit down family restaurant, and a café/deli. These businesses are likely candidates to attract to the commercial district due to the market gap identified for full service restaurants and limited service restaurants in section one of the report. Also, survey respondents frequently requested a supermarket and a hardware store. Additional analysis is needed to determine the actual market for these businesses. The market analysis showed a minimal potential for a supermarket and did not address the need for a hardware store.

It is encouraging that the survey results closely match the findings of the market analysis. However, it should be noted that the survey respondents do not accurately represent the racial and ethnic diversity of the study area. The survey was conducted in English and it is possible that many Spanish-speaking and Hmong-speaking residents did not complete it. To obtain additional information, Layton Boulevard West Neighbors is in the process of conducting focus groups that target different racial and ethnic groups. The results of the focus groups used in conjunction with this report will represent the shopping preferences and neighborhood opinions of the diverse population living in the study area.

Appendix 1:

Map of Trade Areas



Trade Area: National, Lincoln, Layton, and 43rd (LBWN)

Trade Area: National, 5th, Oklahoma, and 43rd (Near Southside Milwaukee)

Appendix 2:

Market Analysis Reports

Layton Boulevard West Neighborhood Market Analysis

Market Area Boundaries: National Ave, South Layton Blvd, Lincoln Ave, & 43rd St
1-Mile Radius

Product	Total Receipts	# Stores	Output per Store 1997 $	Adjusted Output per Store 2000 $	# Shops Local Trade Area	Estimated Total Local Output	Local Demand	Estimated Gap	# Additional Stores to Reach Capacity
Supermarkets	$2,230,656,000	328	$6,800,780	$7,243,461	1	$7,243,461	$8,538,357	$1,294,896	**0.18**
Specialty Grocery	$55,260,000	131	$421,832	$449,290	4	$1,797,160	$205,851	-$1,591,309	**-3.54**
Convenience Grocery	$52,306,000	79	$662,101	$705,199	3	$2,115,597	$205,851	-$1,909,746	**-2.71**
Full Service Restaurants	$197,488,000	319	$619,085	$659,382	3	$1,978,146	$3,295,559	$1,317,413	**2.00**
Limited Service Restaurants	$209,471,000	386	$542,671	$577,995	1	$577,995	$3,499,407	$2,921,412	**5.05**
Clothing Stores	$346,664,000	431	$804,325	$856,680	2	$1,713,360	$2,818,710	$1,105,350	**1.29**
Shoe Stores	$120,278,000	168	$715,940	$762,543	1	$762,543	$976,074	$213,531	**0.28**
Jewelry	$118,762,000	166	$715,434	$762,003	0	$0	$966,551	$966,551	**1.27**
Pharmacies & drug stores	$681,664,000	214	$3,185,346	$3,392,688	0	$0	$3,462,109	$3,462,109	**1.02**
Beauty supplies & Perfume stores	$21,174,000	35	$604,971	$644,351	0	$0	$107,541	$107,541	**0.17**
Optical goods stores	$47,308,000	105	$450,552	$479,880	0	$0	$240,273	$240,273	**0.50**
Food supplement stores	$21,277,000	37	$575,054	$612,486	0	$0	$108,064	$108,064	**0.18**
Hair, Nail & Skin Services	$111,386,000	726	$153,424	$163,411	14	$2,287,751	$565,719	-$1,722,031	**-10.54**
Furniture & Home Furnishings	$505,901,000	338	$1,496,749	$1,594,176	1	$1,594,176	$7,284,287	$5,690,111	**3.57**
			= Total Receipts / # of Stores			= Adjusted Output per Store * # Area Shops		= Local Demand - Total Output	= Gap / Adjusted Output

Data Sources:
- U.S. Census Bureau – 1997 Economic Census of Retail Trade
- Bureau of Labor Statistics – Consumer Expenditure Survey 1997-1998
- 1996 Claritas Income Data

Near Southside Market Analysis

Market Area Boundaries: National Ave, 5th St, Oklahoma Ave, & 43rd St
3-Mile Radius

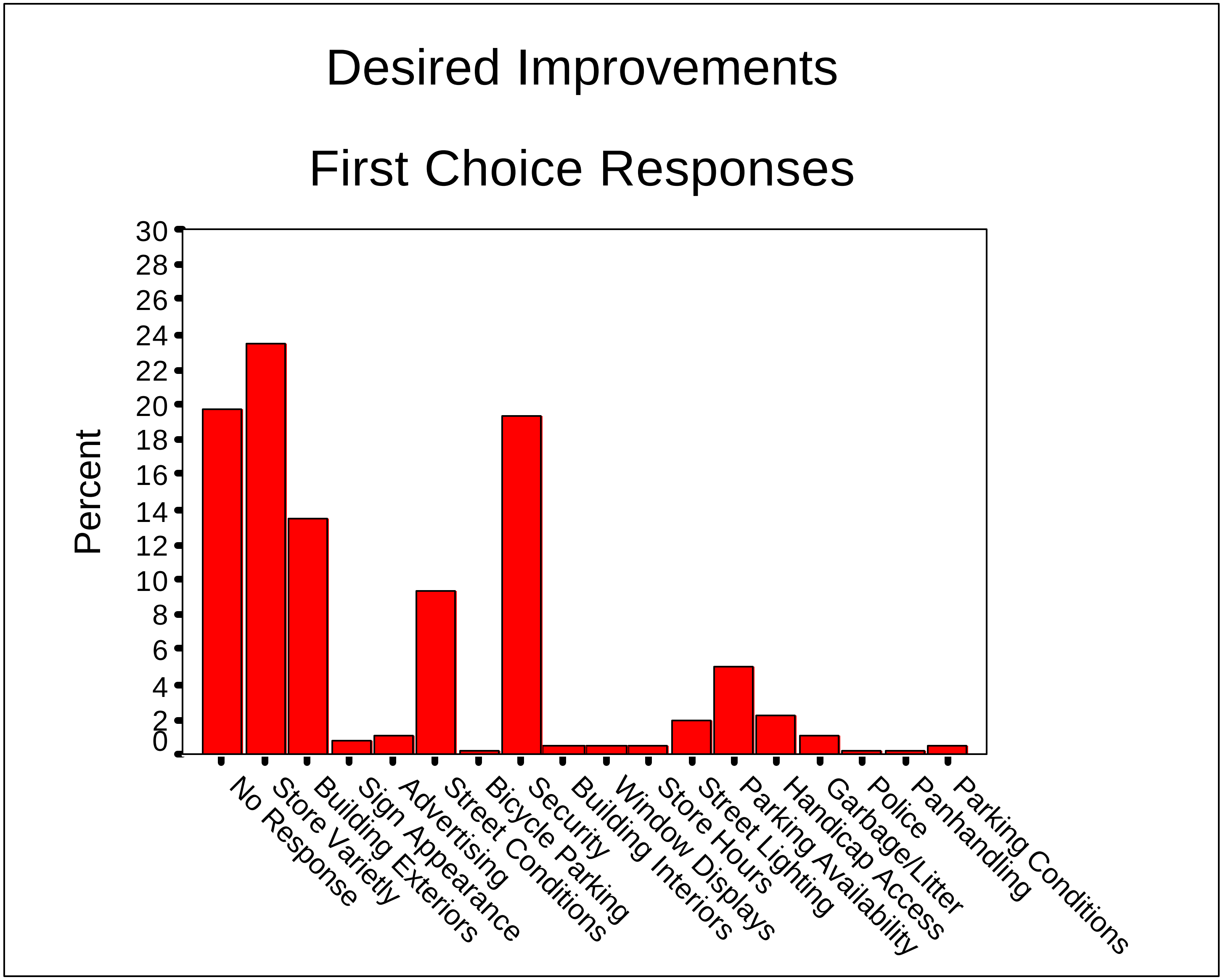
Product	Total Receipts	# Stores	Output per Store 1997 $	Adjusted Output per Store 2000 $	# Shops Local Trade Area	Estimated Total Local Output	Local Demand	Estimated Gap	# Additional Stores to Reach Capacity
Supermarkets	$2,230,656,000	328	$6,800,780	$7,243,461	7	$50,704,227	$45,626,430	-$5,077,797	**-0.70**
Specialty Grocery	$55,260,000	131	$421,832	$449,290	21	$9,435,090	$1,100,008	-$8,335,082	**-18.55**
Convenience Grocery	$52,306,000	79	$662,101	$705,199	27	$19,040,373	$1,100,008	-$17,940,365	**-25.44**
Full Service Restaurants	$197,488,000	319	$619,085	$659,382	36	$23,737,752	$17,610,480	-$6,127,272	**-9.29**
Limited Service Restaurants	$209,471,000	386	$542,671	$577,995	44	$25,431,780	$18,699,788	-$6,731,992	**-11.65**
Clothing Stores	$346,664,000	431	$804,325	$856,680	10	$8,566,800	$15,062,345	$6,495,545	**7.58**
Shoe Stores	$120,278,000	168	$715,940	$762,543	3	$2,287,629	$5,215,846	$2,928,217	**3.84**
Jewelry	$118,762,000	166	$715,434	$762,003	2	$1,524,006	$5,164,960	$3,640,954	**4.78**
Pharmacies & drug stores	$681,664,000	214	$3,185,346	$3,392,688	11	$37,319,568	$18,500,476	-$18,819,093	**-5.55**
Beauty supplies & Perfume stores	$21,174,000	35	$604,971	$644,351	1	$644,351	$574,666	-$69,685	**-0.11**
Optical goods stores	$47,308,000	105	$450,552	$479,880	6	$2,879,280	$1,283,947	-$1,595,333	**-3.32**
Food supplement stores	$21,277,000	37	$575,054	$612,486	2	$1,224,972	$577,461	-$647,510	**-1.06**
Hair, Nail & Skin Services	$111,386,000	726	$153,424	$163,411	38	$6,209,609	$3,023,035	-$3,186,574	**-19.50**
Furniture & Home Furnishings	$505,901,000	338	$1,496,749	$1,594,176	14	$22,318,464	$565,719	-$21,752,745	**-13.65**
			= Total Receipts / # of Stores			= Adjusted Output per Store * # Area Shops		= Local Demand - Total Output	= Gap / Adjusted Output

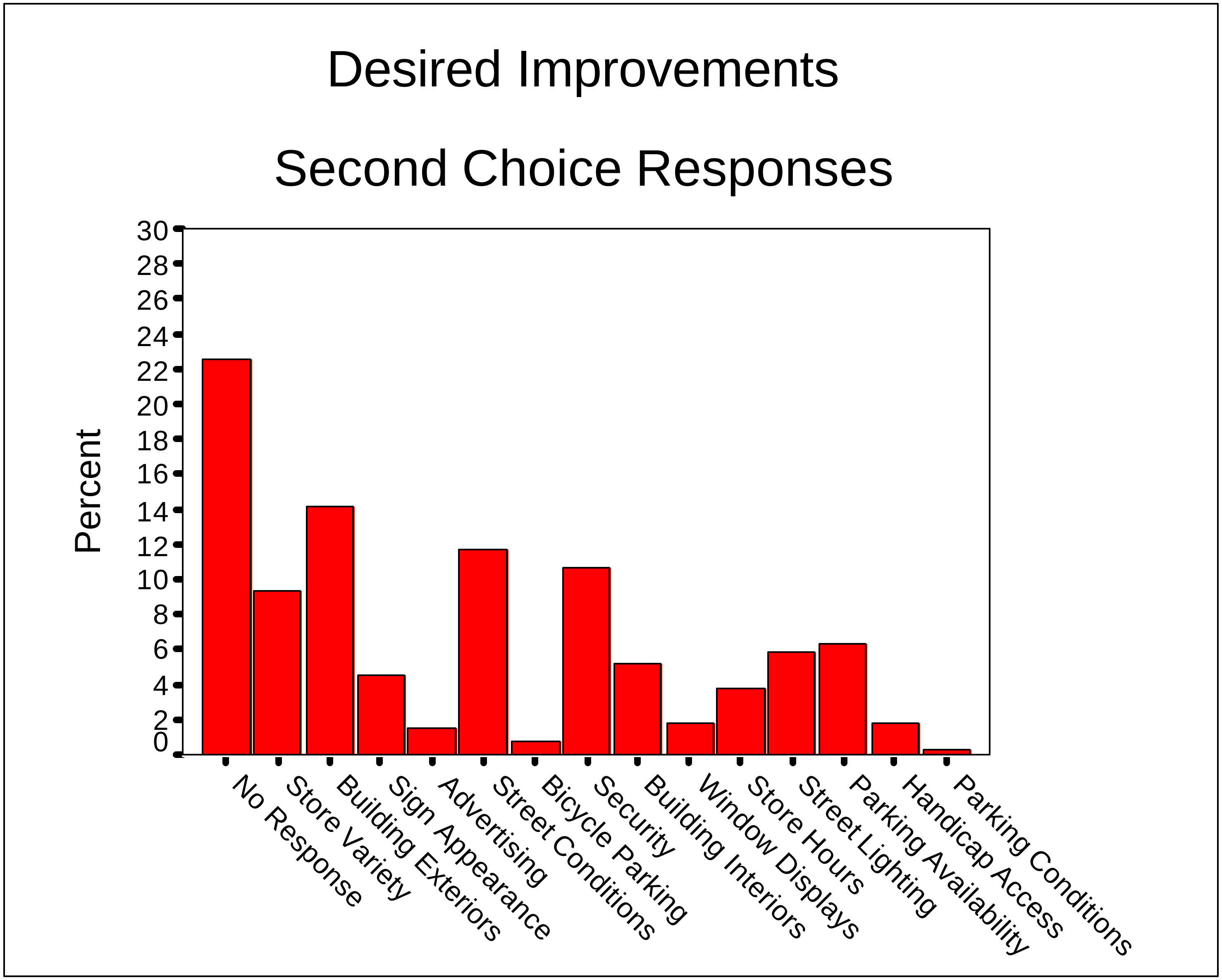
Data Sources:

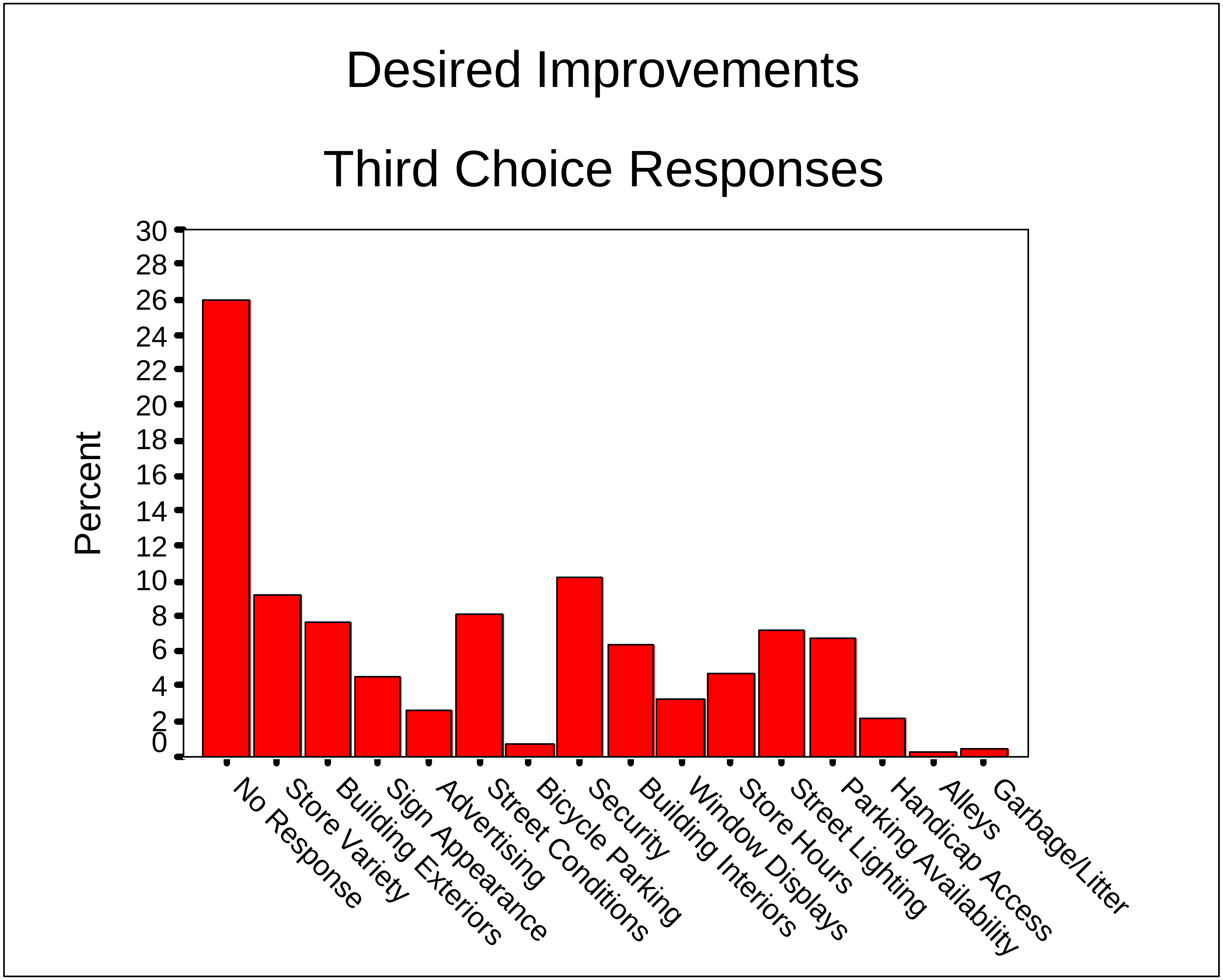
- U.S. Census Bureau – 1997 Economic Census of Retail Trade
- Bureau of Labor Statistics – Consumer Expenditure Survey 1997-1998
- 1996 Claritas Income Data

Appendix 3:

Items that LBWN Residents Want to See Improved

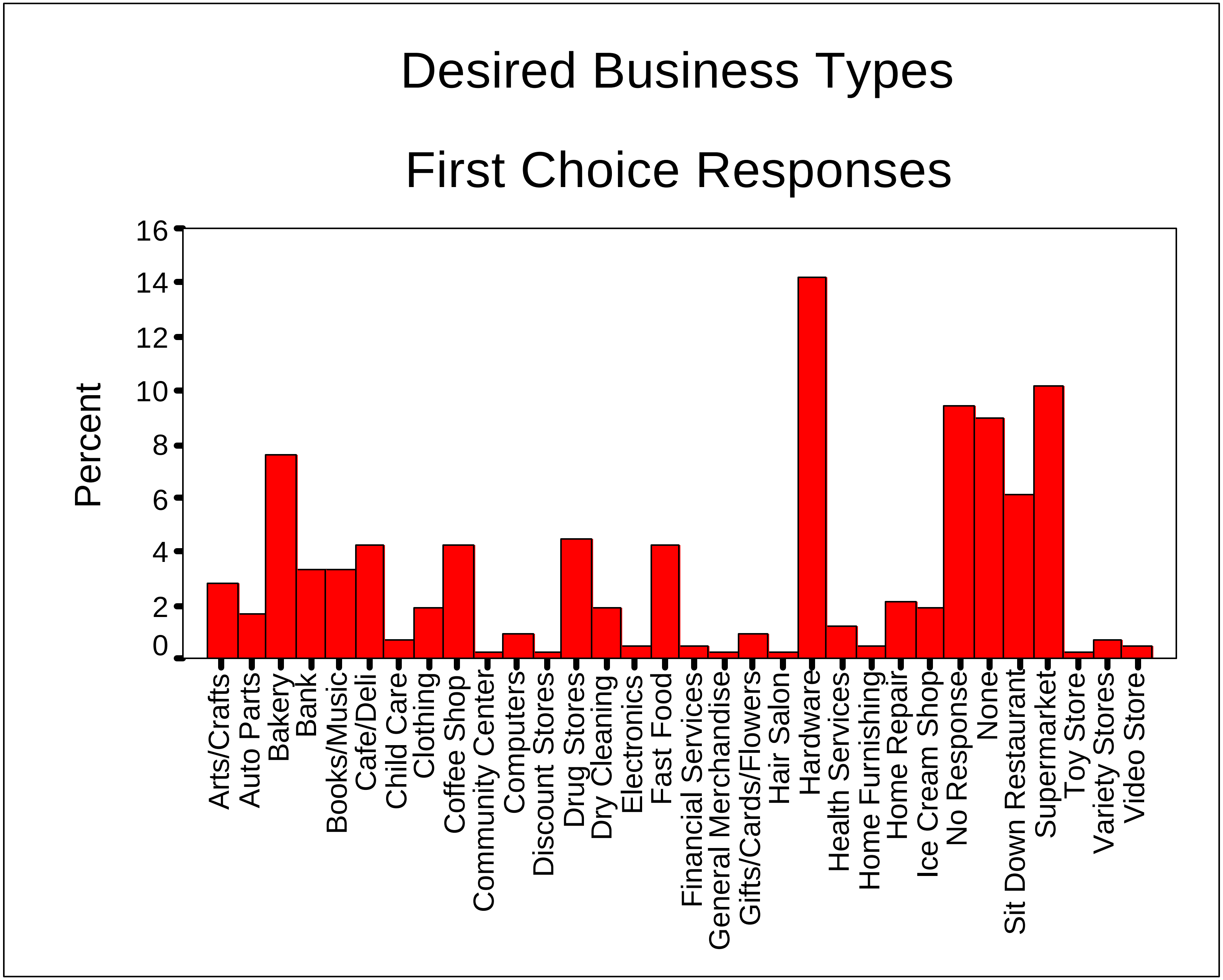

Desired Improvements
First Choice Responses
Percent
30
28
26
24
22
20
18
16
14
12
10
8
6
4
2
0
No Response
Store Varietly
Building Exteriors
Sign Appearance
Advertising
Street Conditions
Bicycle Parking
Security
Building Interiors
Window Displays
Store Hours
Street Lighting
Parking Availability
Handicap Access
Garbage/Litter
Police
Panhandling
Parking Conditions

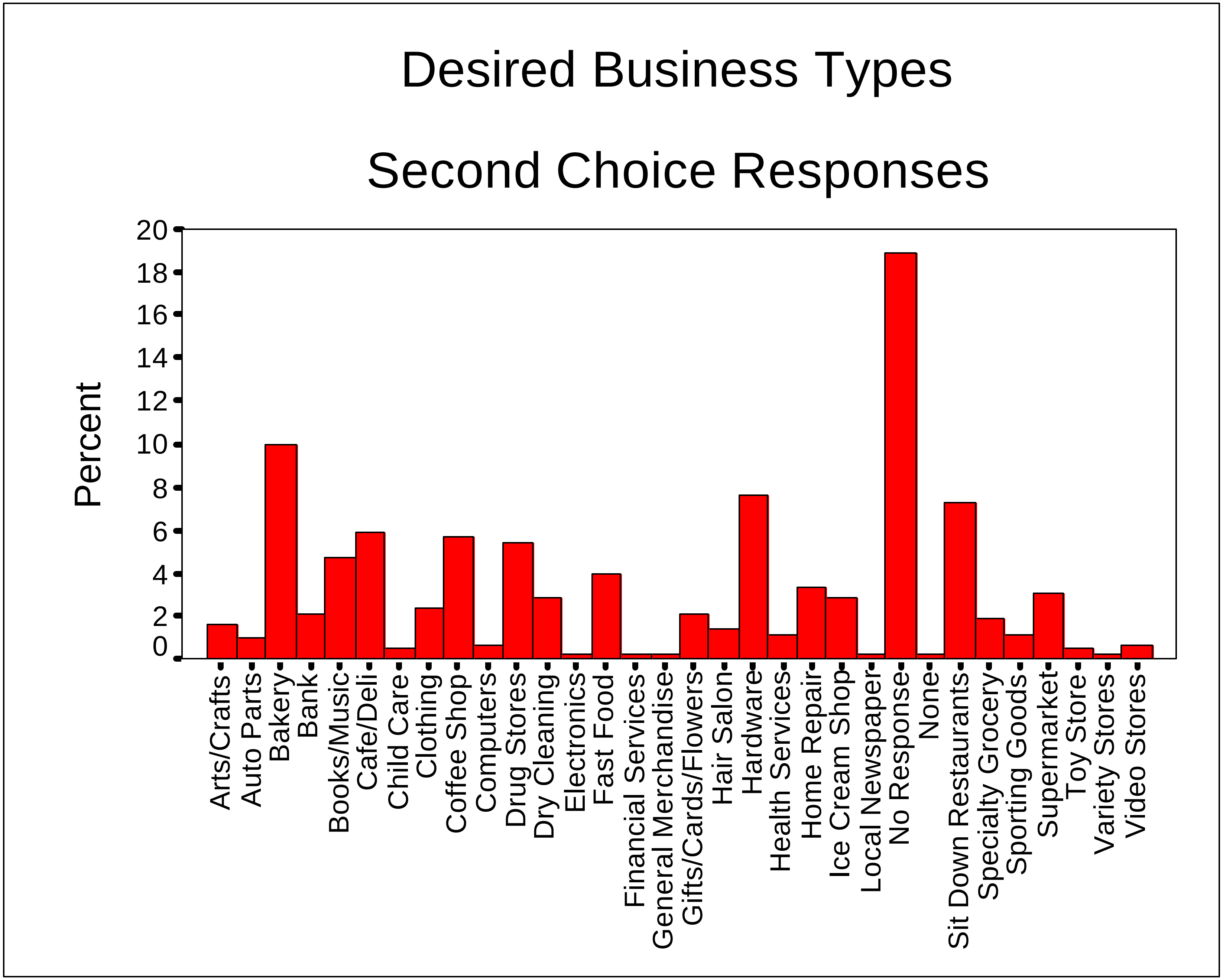

Desired Improvements
Second Choice Responses
Percent
30
28
26
24
22
20
18
16
14
12
10
8
6
4
2
0
No Response
Store Variety
Building Exteriors
Sign Appearance
Advertising
Street Conditions
Bicycle Parking
Security
Building Interiors
Window Displays
Store Hours
Street Lighting
Parking Availability
Handicap Access
Parking Conditions

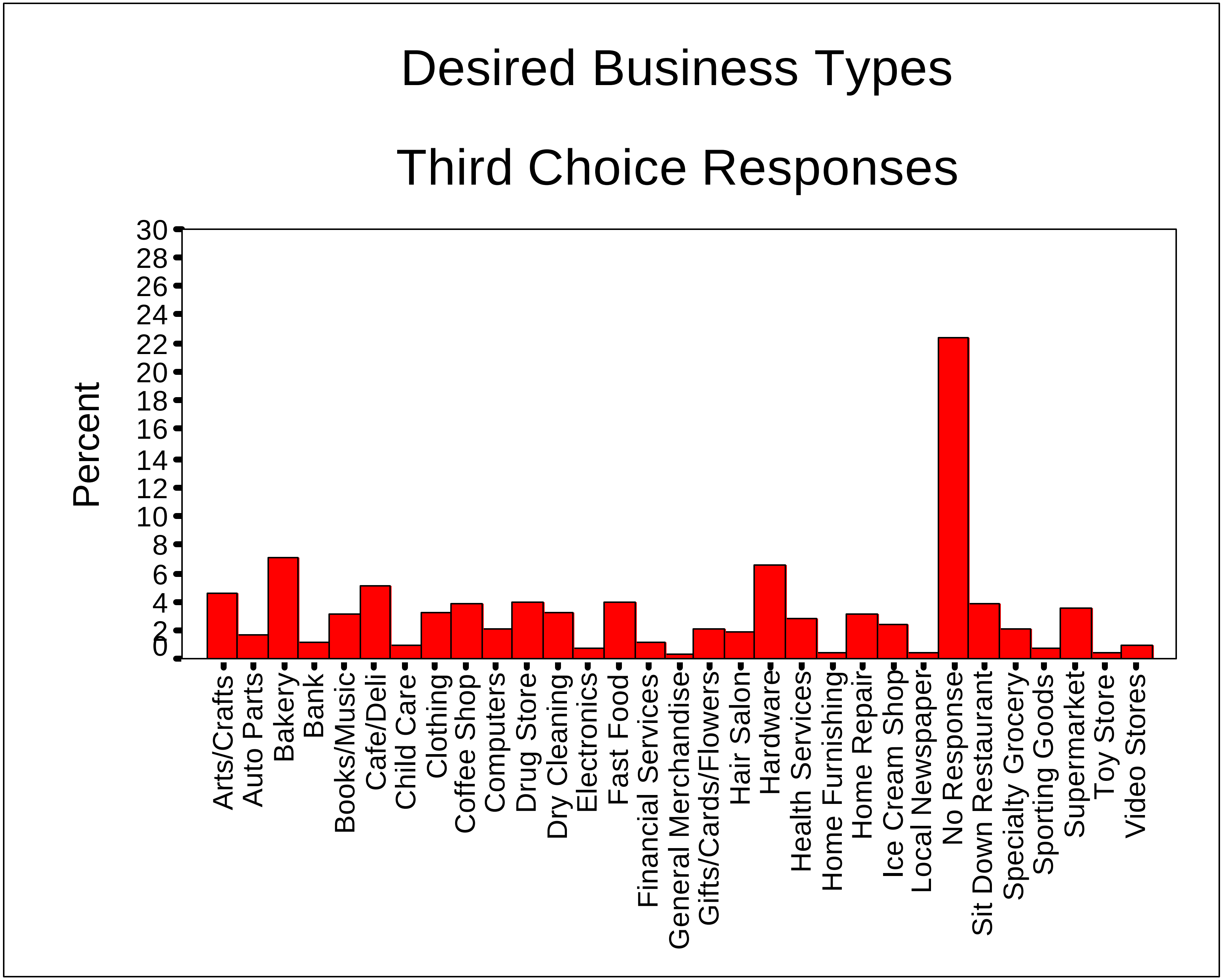

Desired Improvements
Third Choice Responses
Percent
30
28
26
24
22
20
18
16
14
12
10
8
6
4
2
0
No Response
Store Variety
Building Exteriors
Sign Appearance
Advertising
Street Conditions
Bicycle Parking
Security
Building Interiors
Window Displays
Store Hours
Street Lighting
Parking Availability
Handicap Access
Alleys
Garbage/Litter

Appendix 4:

Types of Businesses Requested by LBWN Residents


Desired Business Types
First Choice Responses
Percent
0
2
4
6
8
10
12
14
16
Arts/Crafts
Auto Parts
Bakery
Bank
Books/Music
Cafe/Deli
Child Care
Clothing
Coffee Shop
Community Center
Computers
Discount Stores
Drug Stores
Dry Cleaning
Electronics
Fast Food
Financial Services
General Merchandise
Gifts/Cards/Flowers
Hair Salon
Hardware
Health Services
Home Furnishing
Home Repair
Ice Cream Shop
No Response
None
Sit Down Restaurant
Supermarket
Toy Store
Variety Stores
Video Store


Desired Business Types
Second Choice Responses
Percent
0
2
4
6
8
10
12
14
16
18
20
Arts/Crafts
Auto Parts
Bakery
Bank
Books/Music
Cafe/Deli
Child Care
Clothing
Coffee Shop
Computers
Drug Stores
Dry Cleaning
Electronics
Fast Food
Financial Services
General Merchandise
Gifts/Cards/Flowers
Hair Salon
Hardware
Health Services
Home Repair
Ice Cream Shop
Local Newspaper
No Response
None
Sit Down Restaurants
Specialty Grocery
Sporting Goods
Supermarket
Toy Store
Variety Stores
Video Stores



Desired Business Types
Third Choice Responses
Percent
0
2
4
6
8
10
12
14
16
18
20
22
24
26
28
30
Arts/Crafts
Auto Parts
Bakery
Bank
Books/Music
Cafe/Deli
Child Care
Clothing
Coffee Shop
Computers
Drug Store
Dry Cleaning
Electronics
Fast Food
Financial Services
General Merchandise
Gifts/Cards/Flowers
Hair Salon
Hardware
Health Services
Home Furnishing
Home Repair
Ice Cream Shop
Local Newspaper
No Response
Sit Down Restaurant
Specialty Grocery
Sporting Goods
Supermarket
Toy Store
Video Stores