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Gentilly Retail Study: 2009

university of new orleans
urban and regional planning

May 2009

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By:
University of New Orleans
Masters of Urban and Regional
Planning
MURP 6720 Capstone, Spring 2009

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EXECUTIVE SUMMARY

The following report is an analysis of retail in Gentilly in the Spring 2009 term with some updates throughout the semester (site inventory was taken in the last two weeks of January and first week of February). The report reflects data gathered by a graduate student planning team from the University of New Orleans Department of Urban and Regional Planning. Professors Renia Ehrenfeucht and Marla Nelson directed thirteen graduate students in producing this report. The team's objective was to produce a reliable source of current information for community decision-makers and stakeholders to use in the recovery of retail services and community enhancements throughout Gentilly. The study area was defined as Planning District Six, the St. Bernard Area and the commercial area between Chef Mentour Highway and I-10 in the Gentilly Woods neighborhood.

The report evaluates the capacity for Gentilly residents to support retail services close to four years after Hurricane Katrina. To estimate demand, the team utilized current demographic data available through Environmental Systems Research Institute (ESRI) and Bureau of Labor Statistics Consumer Expenditure Survey data. It also developed an inventory of retail development in the area and estimated supportable square feet of retail space using sales per square foot figures from *Dollars and Cents of Shopping Centers (2006)* published by the Urban Land Institute.

The team identified several factors that limit retail development in Gentilly. These include nearby competing commercial areas, population loss, national retail trends toward big box shopping centers, and the district's "hard" or behavioral boundaries that serve as barrier to those outside the district (I-610, Lake Pontchartrain, City Park, the Industrial Canal).

Any regional scale retail development will face competition from neighboring Jefferson Parish. Additionally, a former high profile retail development in New Orleans East is being redeveloped and could become another competitor. Moreover, Gentilly retail areas were built to support a larger population that was centralized in Orleans Parish. The city and Gentilly were losing residents pre-storm and Hurricane Katrina quickened that population loss. It is unclear how long it will take the area to regain its pre-storm population.

The area also has opportunities. It could improve its retail options by capturing more of the residents' retail purchases by increasing the mix of services and niche markets. One immediate opportunity is the district's four universities that draw a large number of students and employees everyday.

The site inventory showed outdated retail design and unoccupied structures. Residents have identified these as problems in each planning process. The vacant properties also allow flexibility when developing new businesses in Gentilly. Innovative retail trends integrate community resources and offer a pleasing aesthetic environment.

The report is divided into chapters. Chapter 1 (p. 3) describes the project area. Chapter 2 (p. 11) discusses contemporary trends in retail development. Chapter 3 (p. 23) is the inventory of Gentilly's commercial areas and their state of repair and occupancy in January 2009; Chapter 4 (p. 73) discusses retail demand in the project area, the amount of retail space residents, employees and students can support, and how these compare with available space. Chapter 5 (p. 95) discusses techniques to create a vibrant retail environment and chapter 6 (p. 109) details available financing tools and incentives. The appendices follow (p. 121).

CHAPTER I – GENTILLY OVERVIEW & PROJECT AREA

INTRODUCTION

RESILIENCY

At present, Gentilly is better known for its neat rows of post-World War II housing than its retail environment. The quiet, largely middle class communities that comprise the sizeable district were largely residential. Residents typically commuted to their jobs outside Gentilly and returned to their neighborhoods at night. Hurricane Katrina arrived in August 2005 and left in its wake catastrophic flooding that covered at least 80 percent of Orleans Parish. Gentilly was not spared. Many of its neighborhoods, such as Milneburg, St. Anthony, and Filmore, were some of the city's hardest-hit areas, having experienced flood depths of over eight feet for a series of weeks after Katrina's initial landfall. Considering the devastating impacts of the storm on Gentilly, an outsider might think the low-lying area could not recover. But as of January 2009, the Brookings Institution's New Orleans Index reports that the district has repopulated to 57 percent of its pre-Katrina levels.

Pre- and post-storm, Gentilly retail was a concern of the residents of the area, who observed a loss of both population and retail stores pre-storm. This trend is amplified in post-Katrina Gentilly. With ongoing redevelopment it is important to reverse or properly plan for this tendency. While vacancy remains an important factor to consider in the recovery process, this report emphasizes the retail capacity of the project area and the potential of returning vacant properties back into commerce.

OUR PURPOSE

The purpose of our report is to examine the demand for goods and services and available retail space in Gentilly circa January 2009. While the challenges imposed by Hurricane Katrina on New Orleans and specifically Gentilly cannot be overstated, we look especially to the future of retail in Gentilly. The guiding questions behind our analysis are as follows: what is the retail

demand and how does the retail demand for goods and services compare with available commercial space in Gentilly? What strategies can help attract and retain retail and services to improve the quality of life of both present and potential Gentilly residents?

This retail demand study has three objectives:

- First, the report provides a snapshot of the retail inventory in the project area by retail district, which range in size from the Chef Menteur commercial corridor to individual storefronts.
- Second, the analysis assesses anticipated demand in the project area to determine the level of retail and services that residents and visitors could support. It also compares these figures with what is currently available.
- Finally, the report includes a discussion of incentives to help with redevelopment, technical support for businesses, and strategies to address temporarily underutilized land.



Left: Future home of Canseco's grocery on Elysian Fields

THE PROJECT AREA

BOUNDARIES & DEFINITION

The project area, referred to as Gentilly, is located in the north-central part of New Orleans and is bounded on the north by Lake Pontchartrain, on the south by Interstates 10 and 610, on the west by Bayou St. John and on the east by the Inner Harbor Navigational Canal (IHNC), better known as the Industrial Canal. The project area includes the St. Bernard Area neighborhood, the neighborhoods in Gentilly, and the neighborhoods along the lake. Unless otherwise specified, the terms project area and Gentilly will be used interchangeably to refer to the larger combined area of Gentilly proper, the St. Bernard Area, and the Lake Area neighborhoods.

The project area is a composite of nine residential neighborhoods as defined by the city. Many informal neighborhoods are defined and recognized by the residents of the project area, however in this study it is important to reflect the city-defined neighborhoods for the purpose of institutional data collection. Most fall within Planning District 6. The primary traffic arteries are St. Bernard Avenue, Paris Avenue, Elysian Fields Avenue, and Franklin Avenue as well as Leon C. Simon Drive, Robert E. Lee Boulevard, and Gentilly Boulevard. Most of the retail areas that exist within the project area line one of these commercial thoroughfares.

For this analysis, we have divided each retail area within the project area into one of four categories based on building scale and retail type: (in descending order) Regional, District, Neighborhood, and Pedestrian. Each typology is further discussed in Chapter III.

Map 1.1: Project Area



Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

Map 1.2: Active Households Receiving Mail



Source: GNO Community Data Center analysis of Valassis Residential and Business Database

EFFECTS OF HURRICANE KATRINA

The adverse impacts resulting from the breach of the London Avenue Canal levee after Hurricane Katrina caused more than 28,000 Gentilly residents to lose their homes. Eighty-percent of the existing housing stock experienced flooding to a depth of more than four feet. Every retail area in the project area sustained significant damage and many retailers in Gentilly did not return after the storm.

As for residents, by August 2006, an estimated 37 percent of the 2000 population had returned to the community. The current population has not been officially tallied, though it is estimated to have recovered to nearly 60 percent of its pre-storm total (Brookings Institution New Orleans Index 2009). The map to the left indicates the number of active households receiving mail. While the data does not reflect the number of people living in each household and therefore can not be used to estimate re-population it is effective at displaying the recovery process.

It is important to note that some city-defined neighborhoods within the project area have been quicker to recover than others. Gentilly Terrace, for example, reported a greater return of population than its counterparts to the north, including St Anthony and Fillmore.

DEMOGRAPHICS

According to 2008 ESRI Business Analyst data, the total population of the project area was 26,337, representing 8.2 percent of the city's 2008 total population of 321,466 (Table 1). This number is down from 51,476 in 2000. Median household income is at \$38,921, above the city's figure of \$33,099. However, per capita income in Orleans Parish is higher, suggesting the presence of outliers on the upper end of the income scale in the Parish as a whole. Also in 2008, ESRI Business Analyst reported that the project area had a higher population of residents age 55 and older when compared with the City of New Orleans (26.8 percent and 22.3 percent, respectively). African Americans represented 75.2 percent of residents, whites 20.7 percent, and other groups 7.7 percent. The demographics of the project area suggest a middle income community with more families and senior citizens than the city as a whole. For a more in depth discussion of demographics, please refer to the Appendix.

Table 1.1: Project Area Demographics: 2008

	Project Area	Orleans Parish	US
Population	26,337	321,466	309,299,265
Male	44.6%	47.0%	49.10%
Females	55.4%	53.0%	50.90%
Households	9,482	122,479	116,384,754
Average Household Size	2.65	2.52	2.59
Median Age	37.4	34.6	36.8
Median Household Income	\$38,921	\$33,099	\$54,749
Per Capita Income	\$18,127	\$18,704	\$28,151
Race and Ethnicity:			
White Alone	20.7%	30.3%	72.30%
Black Alone	75.2%	64.2%	12.60%
Other	4.1%	5.6%	15.00%
Hispanic Origin (Any Race)	3.6%	4.3%	15.40%

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

INSTITUTIONS & COMMUNITY ASSETS

Gentilly is home to some of New Orleans' most valuable institutions of higher education and important cultural and community assets. Many of the schools date back to the turn of the century; others were built after World War II; all continue to attract New Orleanians and visitors to the neighborhood by the thousands. The health of retail within the project area is tied in part to the presence and continued growth of these major institutions and assets.

A number of these institutions exist along major thoroughfares and attract a large number of visitors from outside the district; Gentilly businesses need to capture consumer expenditures generated from this inflow of people. Gentilly's several institutions and cultural assets can support enhanced retail by increasing the spending taking place in this mostly residential district. Retailers locating near these institutions and assets draw from a broader base of consumers outside of neighborhood residents.



Above: Picture of Pontchartrain Beach

These institutions and assets include:

- The **New Orleans Baptist Theological Seminary**, the largest seminary in New Orleans and one of the first of its kind in the country. www.notbs.edu
- **Dillard University**, a historically black college or university (HBCU) for liberal arts and is working with the Gentilly Civic Improvement Association to create a Community Development Corporation. www.dillard.edu
- **Southern University of New Orleans (SUNO)**, also an HBCU located adjacent to Pontchartrain Park (the first African American subdivision the in U.S.). www.suno.edu
- The **University of New Orleans (UNO)**, part of the Louisiana state system for higher education. UNO is the largest public university in the city. www.uno.edu
- Various public and private high schools of regional and national prominence (e.g. Benjamin Franklin High School, Brother Martin High School)
- Access to the Lake Pontchartrain lakefront (see picture left), the St. Anthony walking trail, the historic Milne Boy's Home, Gentilly Terrace National Register Historic District & Gentilly- Pontchartrain Park Cultural District.



CHAPTER II – RETAIL TRENDS

RETAIL TRENDS

INTRODUCTION

Retail shopping centers are regularly adapted to reflect changes in consumer preferences in order to attract shoppers and remain competitive. Current developments strive to be pedestrian friendly, incorporate outdoor plazas or parks, design buildings that blend with the region's architecture, and supply a mix of services and uses (including civic and residential uses).

RECENT TRENDS

In 2003, *Let's Talk Business* identified the two most prominent retail development trends as being:

- Open air centers
- Free standing retail buildings

Open air shopping centers are generally smaller than the enclosed regional malls popularized in the late 1970s and focus on bringing the shopping experience outdoors.

The two major typologies of these developments are *leisure time/lifestyle* centers and *convenience/value* retail strip centers. Leisure time/lifestyle centers create a pedestrian-friendly, open air shopping environment typically specializing in luxury goods and high-end merchandise. On the other hand, convenience/value retail strip centers tend to be built for destination shoppers, convenient by automobile, specializing in convenience goods for a range of incomes.



ABOVE: Perkins Rowe, Baton Rouge, Example of open air retail

By 2003, the development of **free standing retail** had become the dominant retail development type, surpassing the long popular retail strip centers. These stores are not part of a center, but are independent buildings. Although usually located adjacent to several other retail options, free standing stores do not typically generate pedestrian traffic.

Other notable recent trends in retail include the increase in the popularity of internet shopping (e-tailing), farmers' markets and art markets, and the location of suburban stores (Target, Wal-Mart) in the city (www.uwex.edu)



ABOVE AND BELOW: Examples of free standing retailers



CURRENT TRENDS

The downturn in the retail market and the recent but continued slowdown of the United States economy has directly impacted the demand for retail nationwide. As businesses close, leasing agencies struggle to attract and retain tenants. Developers and leasing agencies are targeting a more diverse tenant mix than previously exhibited by similar developments. Mixed use developments have remained in vogue despite the downturn. These centers are attracting educational institutions, non-profits, and health service organizations among other non-traditional uses in order to fill space within their centers.

The downturn has also caused the retail industry to look once again at discount and bargain shopping to fulfill the demand for low cost goods in light of limited household budgets (www.money.cnn.com).

The traditional “big box” store—especially those with a limited product range, such as electronics stores— have been hit hard by decreased spending and giants such as Circuit City, Linens n’ Things, and Mervyn’s have recently shuttered all of their stores (www.sfgate.com). Some retail experts predict that with the failure of large chain stores, smaller stores that relied on the heavy traffic of these retailers in large shopping centers will experience difficulty as well. Since mixed-use centers tend to rely on a large mix of retailers (as well as neighborhood services) and not one major anchor, they may be more resistant to economic downturns (www.retailtrafficmag.com). On account of its lower prices, Wal-Mart (the biggest box of them all) has fared well (www.usatoday.com).

COMPETING TRADE AREAS

JEFFERSON PARISH

The New Orleans region has been losing sales tax dollars to suburban Jefferson Parish for decades. Jefferson Parish is located west of Orleans Parish and, like Orleans, spans both banks of the Mississippi River. While the most populated portion of Jefferson Parish is its East Bank, with the city of Kenner and the large unincorporated community of Metairie, the West Bank is larger in size and stretches to the Gulf of Mexico at Grand Isle. In addition, the West Bank has seen modest retail growth along the West Bank Expressway, which features many big box stores and smaller commercial establishments.

Jefferson Parish's West Bank also has the Oakwood Shopping Center. Oakwood was significantly damaged during Hurricane Katrina, but reopened to customers in October 2007. Recent reports suggest declining sales at Oakwood in light of the economic downturn.

Jefferson Parish's undisputed largest retail strip—Veterans Memorial Boulevard on the East Bank—is the most common one-stop shopping destination for New Orleanians seeking the “big box experience.” The strip is also home to the Lakeside Shopping Center, the region's largest and most prosperous enclosed shopping mall which has recently been expanded. The Esplanade Mall in Kenner, located near the Louis Armstrong Airport, is another enclosed mall in Jefferson Parish's East Bank, with over 140 specialty shops and anchors such as Macy's and Dillard's. Most of the successful shopping

centers on the East Bank are located near or adjacent to Interstate 10, making them easily accessible to New Orleanians traveling by car. Residents of the project area have quick access to I-10 and the retail shopping centers of Jefferson Parish.

Another popular shopping area in Jefferson Parish's East Bank is Elmwood, which is also an industrial park and major employment center. It is located near the Huey P. Long Bridge that connects the two banks of the Parish.

Residents of the project area have contributed to the success of these regional shopping hubs, especially those located off of interstates with large retailers who offer consumers the ability to “one-stop” shop.



Above: Lakeside Shopping Center, Jefferson Parish

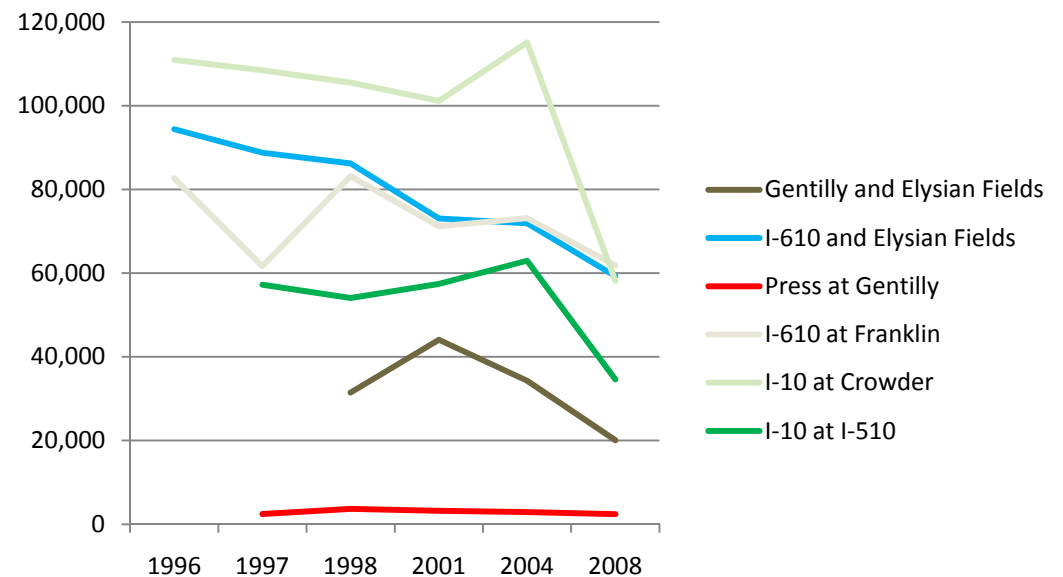
NEW ORLEANS EAST

New Orleans East (the area of Orleans Parish located east of the Industrial Canal, adjacent to the project area) was once a thriving area for large-scale retail and a major competitor to Gentilly. Most retail oriented to Interstate 10. With better visibility and more daily traffic passing by, New Orleans East became a regional and local shopping destination in the 1970s and remained popular into the 1980s. The Lake Forest Plaza Mall, located on Read Boulevard at Lake Forest, opened in 1974 and once competed with Jefferson Parish’s Lakeside and Oakwood Malls. However, the oil bust and demographic changes in New Orleans East led to the decline of the mall. Still, into the 2000s, New Orleans East claimed big box shopping along its major traffic corridors that intersected I-10. Much of the retail has not returned since Hurricane Katrina. The mall itself, inundated by floodwaters, was subsequently demolished. Therefore, while services are slowly coming back to New Orleans East, it is not currently a primary competing trade area to Gentilly. That said, the New Orleans Office of Recovery and Development Administration (ORDA) has designated New Orleans East’s Read Boulevard as one of its Targeted Recovery Zones.

A revitalized retail sector in New Orleans East could likely impact the retail market within the project area. A follow-up study of the demographics as well as retail supply and demand in these Trade Areas would be beneficial.

Large retail chains look at several factors when deciding where to locate businesses. One tool they utilize is the Annual Average Daily Traffic counts. In New Orleans, the AADT is reported by the Louisiana Department of Transportation and Development. As illustrated by Figure 5, Gentilly and New Orleans East have both experienced a decline in traffic counts since Hurricane Katrina.

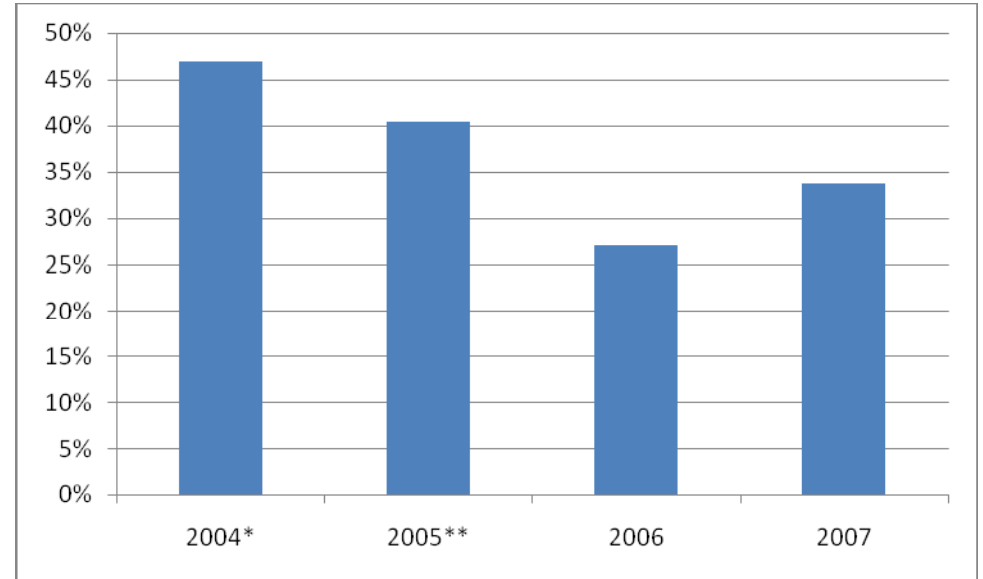
Figure 2.1: ANNUAL AVERAGE DAILY TRAFFIC AT SELECTED INTERSECTIONS IN GENTILLY AND NEW ORLEANS EAST



Source: Louisiana Department of Transportation and Development (<http://www.dotd.la.gov/highways/tatv>)

Tables 2.1 and 2.2 show how Orleans Parish has historically collected significantly fewer sales tax dollars than Jefferson Parish. Before Hurricane Katrina, Orleans fell short of collecting even half the amount of sales tax as Jefferson Parish. This is significant since Orleans was slightly larger in population than Jefferson Parish in the early 2000s. After Hurricane Katrina in 2005, Orleans Parish suffered a loss of retail to a greater extent than Jefferson Parish. This fact only widened the sales tax gap between the two parishes, with Orleans Parish now less populated.

TABLE 2.1: ORLEANS PARISH SALES TAX RECEIPTS AS A PERCENTAGE OF JEFFERSON PARISH SALES TAX RECEIPTS, 2004-2007



Source: *Brookings Institution New Orleans Index, January 2009.*

*2004 data represents only the months between August and December.

**Hurricane Katrina caused a steep drop in retail and population after August 29, 2005

TABLE 2.2: SALES TAX REVENUES FOR JEFFERSON AND ORLEANS PARISHES, 2004-2007

Year	Orleans Parish	Jefferson Parish	Sales Tax as Percentage of Jefferson	Sales Tax Collection Per Capita: Orleans	Sales Tax Collection Per Capita: Jefferson
2004*	\$59,510,295	\$126,932,248	46.90%	\$133.88	\$282.52
2005**	\$123,607,348	\$306,463,089	40.30%	\$282.73	\$683.19
2006	\$117,490,109	\$434,619,169	27.00%	\$525.95	\$1,007.55
2007	\$132,548,610	\$393,525,055	33.70%	\$460.06	\$893.69

Source: *Brookings Institution New Orleans Index, January 2009 and American Community Survey 2004-2007.*

*2004 data represents only the months between August and December.

**Hurricane Katrina caused a steep drop in population and retail after August 29, 2005

STRENGTH, WEAKNESS, OPPORTUNITY AND THREAT ANALYSIS

Most residents desire more retail options in the project area. Some prefer specific stores, whether those are large chain stores such as Target or smaller independent businesses like Zimmer's. Retail goods and services make a place more livable, after all. No one wants to be located too far from essentials—or entertainment.

Yet, in devising strategies to improve the retail environment in the project area, we must also ensure that any new investment does not just shift resources from one area to another. To begin the process of weighing the benefits and disadvantages of intervening, the strengths and weaknesses of the area should be examined. For example, the project area has several sites that seem ripe for reinvestment (Gentilly Woods Shopping Center, to name one). The land is plentiful, the demographics and income density point to success, most citizens desire more options, and the possibilities seem many.

Still, we have to examine what a redeveloped retail in Gentilly might compete against, and if it can compete in its current form. Other important questions remain: is retail in Gentilly a sound investment? Will new development merely spread around already thin resources and result in no net benefit?

By being conscious of existing weaknesses and building on strengths, the project area can become a competitive retail destination. The area is blessed with several institutions, an attractive housing stock, and a good quality of life. What follows is an assessment of the strengths and opportunities of the project area on the one hand and the weaknesses and threats faced by it on the other.

STRENGTHS AND OPPORTUNITIES

•**The presence of educational and seminary institutions.** The project area has the majority of the city's universities, which generate employment opportunities. These universities bring in thousands of staff and students to the area. These visitors could help to support retail services in the project area. If the institutions, community, and businesses work together, they can connect these institutions to the surrounding communities.

•**Lake Pontchartrain.** The lakefront area offers recreational opportunities, open space, and beautiful vistas. With a marketing campaign, the lakefront could draw more visitors and more spending within the project area.

•**Well-established neighborhoods with active associations.** Gentilly is an area with well-defined and proud neighborhoods that continue to rebuild their lives together. Building an identity as a “community of choice” will only help the project area to market itself to both future residents and retailers.

•**A solid, attractive housing stock.** Built earlier than most neighboring suburban areas, the project area has a diverse housing stock that was built to last. Pontchartrain Park, for example, features mid-century modern ranch-style houses, while Gentilly Terrace claims large “Arts and Crafts” style homes of the 1920s. Emphasizing the uniqueness of the area could pay off in attracting new residents and their retail dollars.

•**History.** Most of the built environment, now a half century or older, could be considered historic. Gentilly Terrace is listed on the Department of Interior's National Register of Historic Places. The Pontchartrain Park neighborhood has been recognized as a cultural district with historic significance by Louisiana's Department of Culture, Recreation and Tourism. Historic designations allow tax credits for rehabilitation and serve as a marketing tool for neighborhoods.

•**Transportation.** Getting around by car in the project area is simple and causes few headaches. Parking at most retail establishments is available and accessible. Interstates 10 and 610 form the southern boundary of the project area and allow residents with vehicles relatively easy access to nearly any corner of the region. Further, four bus lines serve the area and connect it with the Central Business District and French Quarter areas, which are major employment centers. While funding is limited and prospects may not be great, a streetcar line along Elysian Fields Avenue or Gentilly Boulevard may someday become a reality as well.

•**Local businesses.** Some local businesses have become icons of the project area. Zimmer's Seafood, Sweet Savors Bakery, and Lafitte's Cafe are all appreciated for providing food and baked goods that cannot be found anywhere else in New Orleans. In an area devastated by Hurricane Katrina, these businesses' presence takes on special meaning, filling painful gaps in needed services. By marketing the project area's local flair and unique businesses through an organization such as StayLocal!, the project area could position itself to better compete.

•**Tourism.** New Orleans is an unabashed tourist city. Millions flock to the city every year to witness and partake in its unique culture, music, and food. Gentilly could market its lakefront, neighborhoods, historic areas, and local businesses and connect them to the wider city of New Orleans in order to capture some tourist dollars. The project area is home to not one but two historically black colleges and universities (HBCUs). Combined with the storied past and present of Pontchartrain Park, these HBCUs could be packaged on the State of Louisiana's existing African American Heritage Trail to capitalize on a growing “heritage tourism” movement.

WEAKNESS AND THREATS

•**Blight and vacancy.** Given population loss and flight of retail, many homes and businesses sit empty. Not all are secured. Dealing with blight and vacancy is and will remain one of the project area's primary struggles in the near future. A difficult situation develops at a point where a large and visible amount of vacant retail space actually drives away additional retail investors. Difficult decisions about re-purposing certain commercial sites may need to be made in the future. Reuse of vacant sites as parks, institutions (such as schools), seasonal event space (such as farmers' markets), community gardens, or even agriculture may have to be considered.

•**Hard boundaries.** Some of the biggest threats to a retail environment are physical and mental barriers that shut the area off from potential customers. These exist on all sides of the project area—as well as within it. With limited connections to areas east (due to the Industrial Canal), none to the north (on account of Lake Pontchartrain), and few to the west (due to Bayou St. John and City Park), the project area is confined by these physical boundaries. I-10 and I-610 to the south are mental barriers as well as physical barriers.

•**An outdated retail stock.** The project area's retail stock is aging and may reflect trends of the era in which it was built. In some cases, attracting new shoppers and retaining residents' spending may involve redesigning old retail spaces to fit new needs.

•**Poor roads/infrastructure.** The Department of Streets has begun construction on Robert E. Lee Boulevard within the project area as of April 2009. Made possible through the “Submerged Roads” funding available through the federal government, these road improvements will gradually make the project area a more comfortable place to drive, bike and walk.

•**Competing trade areas.** Though the project area is largely middle class and seems a sound demographic for retailers and investors, competition from suburban Jefferson Parish is heavy. Income and population density is great there, especially in Metairie, and many project area residents travel there to shop at larger scale retail that is available in only select few spots within the region. Flooding and storm damage was considerably less a problem there as well. Pre-storm, New Orleans East had captured many shoppers seeking big box stores. Some of these stores are returning and may be drawing project area residents.

•**Uncertainties following Hurricane Katrina.** Will the project area continue to repopulate? Most estimates and projections do not see the project area returning to a pre-storm population count in the near future. Retailers are wary of locating in rebuilding areas, whose demographics are hard to track and whose course of redevelopment is difficult to predict.

•**Image as a bedroom community.** Many in the New Orleans region know the project area as a residential area, or as the location of several universities, only. Feeling they have little reason to enter a largely residential area, their dollars stay outside the project area.

•**Flood-proneness.** Even with the Army Corps of Engineers currently at work to develop 100-year storm protection (levees designed to withstand a storm event with a one in 100 chance of occurring each year) for the New Orleans region, the project area remains vulnerable to flooding.

CHAPTER III – RETAIL INVENTORY

THE STATE OF RETAIL IN GENTILLY AS OF JANUARY/FEBRUARY 2009

The following sections include retail types classified by scale, type, and form. The scales as defined by the research team at UNO encompass all retail centers located within the project area. The Chapter is broken into four retail categories: 1) regional , 2) district, 3) neighborhood, and 4) pedestrian

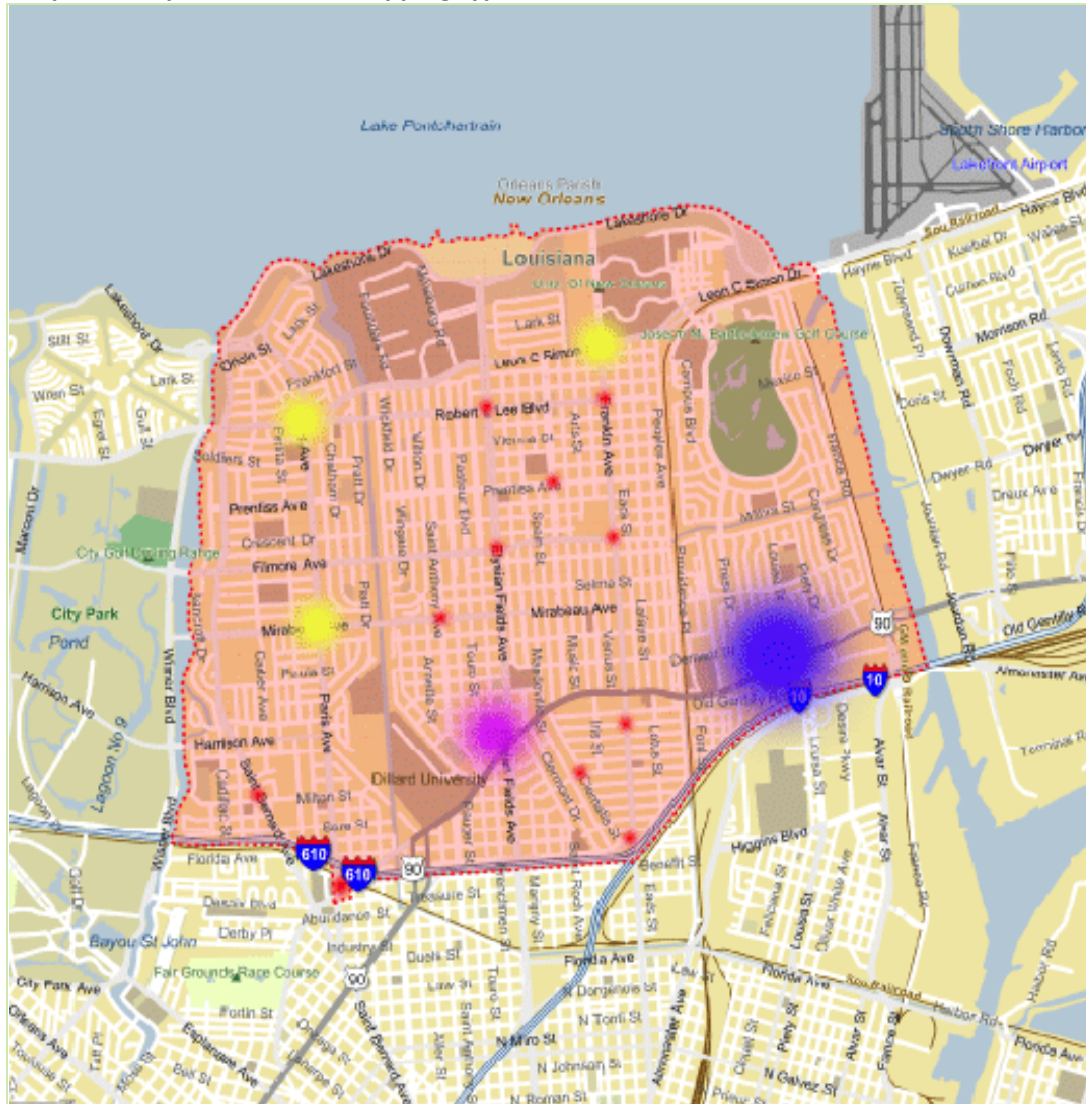
1) The only *regional shopping* center in the project area is the Gentilly Woods shopping center in combination with the Chef Menteur and Old Gentilly commercial corridors. Regional shopping focuses on large and interdependent clusters of shopping centers. The clusters in this regional shopping area are collectively very large, diverse, and mixed among many different types of comparison and convenience retail. In form, regional shopping tends to emphasize ease of access by automobile and ample space reserved for free parking. Buildings have a far setback from the front property line.

2) Similarly the *district shopping* center classification only has one representative within the project area as well: the Gentilly Boulevard and Elysian Fields Avenue intersection. District shopping areas include clusters of interrelated shopping centers much like district shopping. However, district shopping tends to include smaller centers with more convenience goods. In form, district shopping tends to emphasize ease of access by automobile and sufficient space reserved for free parking. Buildings have a moderate setback.

3) *Neighborhood shopping* centers are relatively smaller in scale and focus on convenience goods for the surrounding community. Neighborhood shopping centers are typically anchored by a grocery store or discount retailer. Three shopping centers within the project area are defined as neighborhood shopping. In the project area, these centers usually appear similar in form to one of the centers in *district shopping*, but without clustering.

4) *Pedestrian shopping* is the most common shopping center type found in the project area. Pedestrian shopping refers to the scale of the development and does not imply that the shoppers arrive by foot. Multiple retail areas within the project area have been classified as pedestrian shopping. These small-scale, locally serving clusters of businesses typically feature establishments offering convenience goods. This scale can also host boutique/upscale shops that do not require significant square footage; the project area has few of this type, though.

Map 3.1: Project area with shopping type delineations.



BLUE = Regional Shopping
YELLOW = Neighborhood Shopping
PINK = District Shopping
RED = Pedestrian Shopping

Regional shopping is represented by the blue dot. The largest concentration of retail services in Gentilly:

- Gentilly Woods Shopping Center & the Chef Menteur and Old Gentilly commercial corridors (bounded by Peoples Avenue on the west & Industrial Canal on the east)

District shopping is represented by the pink dot. This scale includes the auto-center cluster located at:

- Gentilly Boulevard & Elysian Fields Avenue

Neighborhood shopping is represented by the yellow dots. This scale includes shopping centers located at:

- Franklin Avenue & Leon C. Simon Drive
- Paris Avenue & Robert E. Lee Boulevard (formerly Lake Terrace Shopping Center)
- Paris Avenue & Mirabeau Avenue (Oak Park Shopping Center)

Pedestrian shopping is represented by the red dots. This scale includes retail districts and nodes at:

- St. Bernard Avenue & Foy Street
- Paris Avenue & Gentilly Boulevard
- St. Anthony Avenue & Filmore Avenue
- Elysian Fields Avenue & Robert E. Lee Boulevard
- Elysian Fields Avenue & Filmore Avenue
- St. Roch Avenue & Prentiss Avenue
- Franklin Avenue & Robert E. Lee Boulevard
- Franklin Avenue & Filmore Avenue
- Franklin Avenue & Interstate 610
- Clematis Street & Clover Street

Map Source: ESRI Business Analyst Online (2009), accessed through GCR and Associates

Eastview, super-regional shopping center, New York State.



REGIONAL SHOPPING

Regional shopping comprises those retail centers that:

- a) have no less than 350,000 square feet of retail space (excluding banks, hotels, and storage facilities);
- b) tend to be located in close proximity to an interstate;
- c) tend to feature both national chain retailers (all scales, including large anchors such as big box stores) as well as independent businesses;
- d) feature a mix of convenience goods and comparison goods; and
- e) need not be one unified center but rather a collection of interrelated and proximal (often large scale) centers with minimal retail street frontage.

Based on these characteristics, the only retail area within the Gentilly District that applies is the series of shopping centers clustered along Chef Menteur Highway and Old Gentilly Road in an area generally known as Gentilly Woods.

GENTILLY WOODS RETAIL

The Gentilly Woods Commercial Area is the largest commercial area within the scope of this study. It consists of two parallel retail corridors: Old Gentilly Road and Chef Menteur Highway from the railroad bridge in the west to the Industrial Canal bridge in the east. The area received some flooding during Hurricane Katrina, although much of it was spared by the naturally high elevation of the Gentilly Ridge.

Thirty-seven percent of the area buildings are currently vacant. The most predominant vacancies are three motels, an outlet mall, the New Orleans Federal office building, and the Gentilly Woods Shopping Center (which the New Orleans Redevelopment Authority recently acquired). Additionally, there are numerous empty lots, which are not included in the vacancy percentage calculation.

The following descriptions of the area will be divided into three sections: Chef Menteur Lakeside (north), Chef Menteur Riverside (south), and Old Gentilly Road. Of the three, Chef Menteur riverside has the highest number of businesses in operation, notably restaurants and the Winn-Dixie supermarket



Above: Gentilly Woods Commercial Area

Below: Gentilly Woods viewed from Gentilly Blvd.



LAKESIDE CHEF MENTEUR HWY

This stretch of Chef Menteur contains the vacant Gentilly Woods Shopping Center. The shopping center will be one of the city's target recovery projects in the near future, which intends to offer incentives to reopen the strip mall. It's current configuration offers around 181,000 square feet and twenty-two units.

The single structure with the most retail activity contains Wagner's Meats, Eastside Seafood, Wash World, and the Sprint Store. This building is on the corner on Louisa Street and Chef Menteur Highway, a major node in Gentilly Woods. Wendy's is also very busy. Set-back from the road lies Stor-All, a storage facility in operation with nearly 72,000 square feet. Soul Train Fashions, east of Stor-All, is also in operation.

The eastern most portion, near the industrial canal, is occupied by two motels, a large warehouse, and an office building, of which only the New Orleans Inn is open and operational. The vacancies in this segment could be due to the limited access created by a ramp that prevents traffic from crossing Chef Menteur Highway. Please refer to the table at the end of this section for more specific details.

GENTILLY WOODS SHOPPING CENTER:

The vacant shopping center was purchased by the New Orleans Redeployment Authority (NORA) in April 2009. According to NORA Executive Director Richard Monteilh, the agency is currently seeking a private development partner to revive the center and return it to being a profitable development.

Moran - Times-Picayune 5/1/2009

Below: Wagner's Meat on Gentilly Blvd.



Below: Gentilly Woods Shopping Center



RIVERSIDE CHEF MENTEUR HWY

This area is the most active of the three divisions of the Gentilly Woods commercial area. From Providence Place to Louisa Street, there are various independent commercial building types dominated by fast food; and all less than 5,000 square feet except the Walgreens on the corner of Chef Menteur and Press Drive. There are also two daiquiri shops, a gas station, a tire shop and an urban clothing store, Dr. J's, east of Louisa Drive. Please refer to the table at the end of this section for more specific details.

To the west of Louisa, there is a gas station, Winn Dixie Supermarket, the Kirschman Shopping Center, two motels, and the New Orleans Federal mid-rise office building. Of these, the outlet mall and the office building are vacant, accounting for significant square footage. The re-opening of the Winn Dixie was highly welcomed by the community. The two motels provide affordable lodging for delivery drivers utilizing nearby truck repair services or on holdover for a load. Additionally, parking is not a constraining factor in this area. The large retail parking lots and lack of on-site housing means peak parking demands are satisfied. The abundant supply of parking encourages future peripheral use.

Right: Burger King on Gentilly Blvd.



Below: New Orleans Federal Office Complex (vacant)



KIRSCHMAN SHOPPING CENTER:
 The current zoning on the parcel is C-1 Neighborhood Commercial and will likely not change significantly in the CZO updating process. The site is +/- 4.0 acres and currently houses a 61,000 sq ft building and a small 505 sq ft structure. Current asking price for the site is \$1.3 million. Essentially this means, any new development carries land costs of \$21.31 a square building foot up to the previous building's size plus demolition costs.

Below: Winn-Dixie Parking lot





Above: Warehousing Distribution Center



Right: Home Depot on Old Gentilly Rd

OLD GENTILLY ROAD

Old Gentilly Road, between Providence Drive and Press Street, is characterized by a local soul food restaurant, hair salons, and laundromats. In that area, shotgun style homes abut Old Gentilly Road. To the east, there is a large vacant hotel, several vacant lots, and three vacant restaurants. There is an auto body shop, a Subway franchise, and a snowball stand that are operational. At I-610, a Family Dollar and a McDonalds are also open.

Past the I-610 interchange to the east, there is a Home Depot, a Travel Plaza, and a large warehouse/storage facility that are all open. The Home Depot is very active, servicing the area's rebuilding effort. Additionally, Rooms-To-Go operates a trailer staging area directly east of the vacant New Orleans Federal office building. The abundant surface parking, warehousing expansion capacity, and location to the canal position the area to serve as a distribution hub. The Big Easy Travel Plaza houses a restaurant, banquet hall, convenience store, and truck and lube repair shop. These services capture revenue generated from multi-modal shipping (trucks and canal barges).

Below: Gentilly neighborhood



TRANSPORTATION

The predominate through-fare is Chef Menteur Highway, which is facilitated by the configuration of the I-610 interchange and the Industrial Canal Bridge; essentially bypassing Old Gentilly Road. Chef Menteur Highway has a boulevard design in the Gentilly Woods commercial area, characterized by a large grass island with palm trees. The Broad Street RTA bus route, one of the longest routes, also serves this area, running all the way from Uptown to New Orleans East.

Much of the traffic in the area is associated with I-610. The annual daily traffic counts in 2008 from the LA Department of Transportation for I-610 are around 75,000 vehicles daily. The traffic counts on Chef Menteur near the industrial canal are nearly 20,000, while Chef Menteur near the seminary are only 2,400; Therefore, there appears to be a dramatic influx of traffic associated with I-610; suggesting that as little as 9% of the total traffic is originates from the residential areas to the west of the Gentilly Woods commercial area.

TARGET AREAS

Many of the smaller business are clustered within the Gentilly Woods commercial area. Auto repair, fast food, hair salons, motels, gas stations, and clothing stores are all replicated within the area. The big boxes stand alone however. The closest comparable large supermarket to the Winn-Dixie is the Rouse's on Leon Simon Dr, approximately 2.6 miles away. The closest comparable building supply store to the Home Depot is the Lowe's on Elysian Fields Ave, approximately 2.4 miles away. Furthermore, Walgreen's is 1.2 miles from its sister store at Elysian Fields and Gentilly.

Analysis of the demographics of the area are complicated by a lack of data following Katrina. This housing data is crucial in order to estimate a local base population of convenience shoppers. Within a half-mile buffer of the Gentilly Woods commercial area, there is an estimated population of 6,007 people, which is down from 11,535 in 2000. In order to understand the residential recovery within that same half-mile radius, consider that there were approximately 4,758 housing units in the year 2000, 2,911 of which were receiving mail., as of September of 2008. There were also 1,794 Road Home grants to rebuild within this half-mile buffer, and 218 sales to Road Home. Gentilly Woods is too large to be supported by surrounding residents alone, and for all the existing commercial space to become viable it needs to draw from a larger area.

Below: North view of Chef Menteur Hwy



GENTILLY WOODS DISTRICT

ADDRESS	OCCUPANCY	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
4490 Chef Menteur Hwy	occupied	Dr. J's	urban wear
4480 Chef Menteur Hwy	occupied	Popeye's Chicken	fast food
4460 Chef Menteur Hwy	occupied	Rally's	fast food
4456 Chef Menteur Hwy	occupied	Speedee	auto repair
4454 Chef Menteur Hwy	occupied	Burger King	fast food
4450 Chef Menteur Hwy	occupied	New Orleans Original Daiquiris	bar
4308 Chef Menteur Hwy	occupied	Kitchen Cabinet & Granite	retail/contractor
4306 Chef Menteur Hwy	occupied	General Contractor William Acevedo	const. contractor
4304 Chef Menteur Hwy	occupied	Shirl's Pet Salon	pet grooming
4302 Chef Menteur Hwy	occupied	California Nails & Gifts	nail salon
4300 Chef Menteur Hwy	vacant	n/a	office space
4242 Chef Menteur Hwy	occupied	Shoe Show	shoe retail
4200 Chef Menteur Hwy	occupied	Walgreens	pharmacy/retail
4201 Old Gentilly Road	occupied	SnoBiz	snowball stand
-----	vacant	Knight's Inn	hotel
4221 Old Gentilly Road	occupied	Best Way Automotive	auto body shop
4300 Old Gentilly Road	occupied	Subway	fast food
-----	vacant	Pizza Hut	fast food
4500 Old Gentilly Road	vacant	Cousin's Creole Cuisine	restaurant
4525 Old Gentilly Road	occupied	Family Dollar	discount retail
4240 Louisa Street	occupied	McDonald's	fast food
4301 Louisa Dr-A*	occupied	Wagner's Meat	Gas/convenience
-----	occupied	Car Wash	Car Wash
4301 Louisa Dr-B*	occupied	Eastside Seafood	Restaurant
4301 Louisa Dr-C*	occupied	Sprint	Wireless Comm. Store
4301 Louisa Dr-D*	occupied	Wash World	Laundry mat
4601 Chef Menteur Hwy	occupied	Gentilly Woods Self Storage	Self Storage
4603 Chef Menteur Hwy	vacant	Sonic Drive-In	Fast Food Restaurant
4605 Chef Menteur Hwy	occupied	Wendy's	Fast Food Restaurant
4801 Chef Menteur Hwy	occupied	Soul Train Suit Warehouse	Clothing
4819 Chef Menteur Hwy	vacant	Family Dentistry-Dr Romell J Madison	Dentist Office
4861 Chef Menteur Hwy	vacant	Friendly Inn International	Motel

GENTILLY WOODS DISTRICT

ADDRESS	OCCUPANCY	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
4901 Chef Menteur Hwy	vacant	Warehouse Site	Motel
4939 Chef Menteur Hwy	vacant	Patriot Protection Agency	Security
-----	vacant	Scott's Casuals	Clothing
-----	vacant	Corporate Personnel Service Temps	Temp Jobs (Marine Division)
-----	vacant	Show of Hands Nail Salon	Salon
-----	vacant	Wilson Construction	Construction
-----	vacant	CPSI, INC	Sanitation Services
-----	vacant	Healthy Hair Affair	Salon
5001 Chef Menteur Hwy	vacant	Tharp Funeral Home-Gentilly	Funeral Home
5035 Chef Menteur Hwy	occupied	New Orleans Inn Motel	Motel
4600 Chef Menteur Hwy	occupied	Winn Dixie	grocery/pharmacy
4700 Old Gentilly Rd	occupied	Home Depot	home building supplies
5000 Old Gentilly Rd	occupied	Big Easy Travel Plaza	gas/convenience
5000 Old Gentilly Rd	occupied	Jolly's Banquet Hall	banquet/meeting
5000 Old Gentilly Rd	occupied	Jolly's Restaurant	restaurant
5000 Old Gentilly Rd	occupied	Mobile Delvac Truck Lube Center	truck/rv repair, oil change
4800 Chef Menteur Hwy	vacant	Kirschman Clearance Outlet	outlet furniture, bedding, appliances
4900 Chef Menteur Hwy	vacant	Aaron's Rental	rental store
4940 Chef Menteur Hwy	occupied	Econo Lodge	hotel
4950 Chef Menteur Hwy	occupied	Royal Inn of New Orleans	motel
4500 Chef Menteur Hwy	occupied	Fuel Zone	gas/convenience/car wash
5300 Old Gentilly Rd	occupied	Storage & Forwarding Corp.	warehousing/container sales
4948 Chef Menteur Hwy	vacant	New Orleans Federal	office
3918 Gentilly Blvd.	occupied	International Hair Affair	Salon
3922 Gentilly Blvd.	occupied	Rejuvenation Concepts	Salon
3930 Old Gentilly Rd	occupied	L & R Security Services	office
3964 Old Gentilly Rd	occupied	Old Gentilly Laundromat	laundromat
3972 Old Gentilly Rd	occupied	Washland Laundry	laundromat
4020 Old Gentilly Rd	occupied	Tire Town Team	Car care
4038 Old Gentilly rd	vacant	D. White Realty Co.	Realtor
4044 Old Gentilly Rd	occupied	Bar-b-que and seafood	restaurant
4114 Old Gentilly Rd	occupied	Bethel Colony Transformation Center	Church

GENTILLY WOODS DISTRICT

ADDRESS	OCCUPANCY	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
4068 Old Gentilly Rd	occupied	Between the Shears	Salon
4008 Chef Menteur Hwy	occupied	Kim's food store	convenience store
4012 Chef Menteur Hwy	vacant	Daiquiri Chef	daiquiri shop
4030 Chef Menteur Hwy	occupied	Church's Chicken	restaurant
4040 Chef Menteur Hwy	occupied	Chevron Gas Station	Gas Station
3939 Gentilly Blvd	occupied	New Orleans Theological Seminary	School
40XX Chef Menteur Hwy	occupied	Enterprise Rent a Car	car rental service
40XX Chef Menteur Hwy	occupied	Goodyear Tire	auto repair
4200 Chef Menteur Hwy	vacant	Foot Locker	Shoe Store
4200 Chef Menteur Hwy	vacant	Radio Shack	Electronics
4200 Chef Menteur Hwy	vacant	Step N' Style	Clothing
4200 Chef Menteur Hwy	vacant	Cash 2 U	Pay Day Loan
4200 Chef Menteur Hwy	vacant	Rent Way	Storage
4200 Chef Menteur Hwy	vacant	Hair Salon	Beauty
4200 Chef Menteur Hwy	vacant	Medical Center	Healthcare
4200 Chef Menteur Hwy	vacant	TJ Beauty Supply	Beauty
4200 Chef Menteur Hwy	vacant	Piccadilly	Restaurant
4200 Chef Menteur Hwy	vacant	Wigs/Hair Pieces	Beauty
4200 Chef Menteur Hwy	vacant	Christian Book Store	Education
4200 Chef Menteur Hwy	vacant	Jewelry	Jewelry
4200 Chef Menteur Hwy	vacant	Annas Linens	Home Goods
4200 Chef Menteur Hwy	vacant	Urban Trendz	Clothing
4200 Chef Menteur Hwy	vacant	Tuxs R Us	Clothing
4200 Chef Menteur Hwy	vacant	Ashley Stewart	Clothing
4200 Chef Menteur Hwy	vacant	Foot Action	Shoe Store
4200 Chef Menteur Hwy	vacant	Eve's Shoes	Shoe Store
4200 Chef Menteur Hwy	vacant	Mack's Menswear	Clothing
4200 Chef Menteur Hwy	vacant	Concentra Medical	Medical Supply
4200 Chef Menteur Hwy	vacant	Dixie Auto Title	Legal Service
4200 Chef Menteur Hwy	vacant	Community Grocery	Supermarket
4200 Chef Menteur Hwy	vacant	Prime Cleaners	Clothing
4200 Chef Menteur Hwy	occupied	Chase Bank	Banking

The Grove. A pedestrian-friendly retail village, Maple Grove, MN



DISTRICT SHOPPING

District shopping comprises those retail centers that:

- a) have at least 200,000 square feet of retail space (excluding banks, hotels, and storage facilities), but no more than 350,000;
- b) tend to be located more than one half mile from an interstate;
- c) tend to feature both national chain retailers (small and mid-scale) as well as independent businesses;
- d) feature more convenience goods than comparison goods; and
- e) need not be one unified center but rather a collection of interrelated and proximal centers.

Based on these characteristics, the intersection of Gentilly Boulevard and Elysian Fields Avenue is the only district shopping center within Gentilly.

ELYSIAN FIELDS AVE & GENTILLY BLVD

Elysian Fields Avenue is a major north-south distributor that is often considered a boundary between neighborhoods in the Gentilly District. It carries a speed limit of 35 miles per hour throughout its length in the project area (Stephen Girard to the north, I-610 to the south, Franklin Avenue to the east, and St. Anthony to the west). In this same stretch, Elysian Fields is comprised of two traffic lanes and a narrow parking lane (many commercial spaces and/or residents have driveways or park partially on the curb) on both its northbound and southbound sections. A large neutral ground spans the length of the project area. Its character is largely commercial, but some housing is found near the intersection.



Below: Aerial map of intersection, Google Earth, April 2009

Gentilly Boulevard is an east-west distributor that spans the length of Gentilly. It carries a speed limit of 30 miles per hour in the project area. Like Elysian Fields and many other larger streets in Orleans Parish, Gentilly Boulevard to the west of the project area has a median. The streets that feed off of Gentilly are often difficult to maneuver and sporadically connected.

The first node is an intersection comprised of two major streets, Elysian Fields and Gentilly Boulevard. All four corners host or once hosted retail or commercial use.

In addition to the major intersection smaller roads create an irregular street pattern. Most of these oddly shaped street corners host smaller retail or commercial uses.

JANUARY 2009 OBSERVATIONS

The node comprised of Elysian Fields and Gentilly Blvd has a number of commercial strip centers located at or near the intersection of Elysian Fields and Gentilly. The northeast corner of the node is occupied by a multi-bay gas station and draws a significant amount of automobile traffic. Several smaller venues are located behind the gas station, primarily located along Gentilly Blvd. A Capitol One bank, as well as a business that serves po-boys and snoballs is located along Elysian Fields.

The northwest corner of the node is anchored by a commercial strip center with a recently repaired and operating Capital One Bank. This venue draws heavy automobile traffic. The majority of the spaces in this shopping center are occupied. Patrons arrive primarily by automobile. The sidewalks at this location are difficult to distinguish from vehicle driveways.

The southwest corner of this node hosts another commercial strip center. Anchored by Rite Aid, this commercial venue has been repaired and is currently operating. The southeast corner of the node hosts a recently constructed Walgreen's. Sidewalks and crosswalks are visible, but fading.

Below: Photo of Gentilly and Elysian Fields



The second region within Elysian Fields Avenue and Gentilly Boulevard is a complex node with several intersections. It diverges from Gentilly (Westbound) on both its southwest and northwest sides. It is comprised of a number of smaller retail or commercial uses. A number of the properties have been repaired in the node.

The area hosts a number of smaller retail venues. While there is no anchor for this section, staple retail establishments include McKenzie’s Chicken in a Box and Liberty Bank. Tax preparation and salons are also clustered in this area. These venues draw heavy automobile and pedestrian traffic. Most of the establishments in this node are occupied. Patrons arrive primarily by automobile; however, a number walk to the location. This node more closely resembles a neighborhood scale development, compared to the typical development in the previous node. It is more conducive to foot traffic from the surrounding neighborhood. This node also had a New Orleans Public Library, which has been demolished



Left: Ashley Stewart clothing store



Below: Former US Post Office shopping area

Below: Photo of Frenchmen and Elysian Fields



INFRASTRUCTURE AND TRANSPORTATION

The intersection of Elysian Fields Avenue and Gentilly Boulevard is one of the most heavily trafficked intersections within the project area. The Average Annual Daily Traffic estimate for this intersection was 34,292 automobiles in 2004, while the most recent number, recorded in 2008, found that more than 20,083 automobiles pass through this intersection each day. Elysian Fields Avenue is major north/south thoroughfare divided by a sizeable neutral ground. Gentilly Boulevard is a major east/west roadway that is lined with numerous businesses throughout this node. Various intersections along Gentilly Boulevard traverse at odd angles; thus causing irregularities in turning angles and lot shapes due to the way in which Gentilly Boulevard divides this grid.

At the northeast, northwest, and southwest corners, the sidewalks are generally maintained. At the southeast corner, the portion of the sidewalk is maintained. Crosswalks are present, though the striping shows considerable amounts of wear. Furthermore, many street corners are not ADA-compliant. The New Orleans Regional Transit Authority has bus stops located at the northwest (southbound) and southeast corner (northbound) corners. The Elysian Fields Route (route number 55) services this node.



Above: Rite Aid pharmacy



Above: Free standing Walgreens at Elysian Fields and Gentilly

ELYSIAN FIELDS AVE & GENTILLY BLVD

ADDRESS	OCCUPANCY	REPAIR STATUS	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
3114 Gentilly	Occupied	Repaired	Ebone Hair and Beauty	Beauty Supply/Salon
Gentilly Blvd	Occupied	Repaired	Ashley Stewart	Clothing
Gentilly Blvd	Occupied	Repaired	Sport Culture	Clothing
-----	Occupied	Repaired	Rite Aid	Drug Store
3071 Gentilly	Occupied	Repaired	AutoZone	Auto Parts/Repair
Gentilly Blvd	Occupied	Repaired	Cash America Pawn	Taxes/Cash Advance
3069 Gentilly	Unoccupied	Under Repair		
3043 Gentilly	Occupied	Repaired	Sherwin Williams	Home Repair/Supply
-----	Unoccupied	Unrepaired	Your' Beauty Salon	Beauty Supply/Salon
3040 Gentilly	Occupied	Repaired	Jackson Hewitt	Taxes/Cash Advance
3034 Gentilly	Occupied	Repaired	Fast Tax	Taxes/Cash Advance
3030 Gentilly	Occupied	Repaired	Gentilly Medical Center	Medical
3024 Gentilly	Occupied	Repaired	Park Place Barber & Spa	Beauty Supply/Salon
Gentilly Blvd	Occupied	Repaired	Angelo's Transmission and Auto Repair	Auto Parts/Repair
3002 Gentilly	Occupied	Repaired	Liberty Bank	Bank
4001 Norman Mayer	Occupied	Repaired	Salon Viva Glam	Beauty Supply/Salon
2051 Senate	Occupied	Repaired	HANO Bldg B	Government
4100 Touro	Occupied	Repaired	HANO	Government
2093 Caton	Occupied	Repaired	Advance American Cash Advance	Taxes/Cash Advance
2089 Caton	Occupied	Repaired	Star Plus	Beauty Supply/Salon
2073 Caton	Occupied	Repaired	Allstate	Insurance
Caton	Unknown	Unknown	A & W Healthcare Education	Medical
2083 Caton	Unoccupied	Unknown		
Touro & Caton	Unoccupied	Unrepaired	China Restaurant	Restaurant
2103 Caton	Occupied	Repaired	Subway	Restaurant
2109 Caton	Occupied	Repaired	Palms Beauty Salon	Beauty Supply/Salon
2111 Caton	Occupied	Repaired	Soul Purpose Diner	Restaurant
2111 A Caton	Occupied	Repaired	Palms Barber Shop	Beauty Supply/Salon
2111 B Caton	Occupied	Repaired	Boomerang Tax Refund	Taxes/Cash Advance
2107 Caton	Occupied	Repaired	Gentilly Wash N Fold	Laundry
2113 Caton	Occupied	Repaired	A & J Beauty Supply	Beauty Supply/Salon

ELYSIAN FIELDS AVE & GENTILLY BLVD

ADDRESS	OCCUPANCY	REPAIR STATUS	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
2121 Caton	Occupied	Repaired	Queen Nails	Beauty Supply/Salon
2125 Caton	Occupied	Repaired	Family Dollar	Discount Retail
2135 Caton	Unoccupied	Repaired	Relocated to 5330 Tchoup	
3141 Gentilly	Occupied	Repaired	Greg's Furniture	Furniture
3159 Gentilly	Unoccupied	Repaired		
3153 Gentilly	Occupied	Repaired	Sally's Beauty Supply	Beauty Supply/Salon
3155 Gentilly	Occupied	Repaired	Simply Fashions	Clothing
4001 Frenchman	Occupied	Repaired	Radio Shack	Electronics
3105 Gentilly	Occupied	Repaired	Burger Orleans	Restaurant
3129 Gentilly	Occupied	Repaired	Boss Status: Urban Apparel	Clothing
3133 Gentilly	Occupied	Repaired	US Home Direct	
3135 Gentilly	Occupied	Repaired	H & R Block	Taxes/Cash Advance
Elysian Fields	Occupied	Repaired	Capital One	Bank
3150 Gentilly	Occupied	Repaired	Payday Loans	Taxes/Cash Advance
31210 Gentilly	Occupied	Repaired	China Buffet	Restaurant
3839 Frenchmen & Foy	Occupied	Repaired	McKenzie's Chicken N A Box	Restaurant
3044 Gentilly & Foy	Occupied	Repaired	Riteway Soul Food	Restaurant
3837 Frenchmen	Occupied	Repaired	Wilson's Shoe Repair	Clothing
3835 Frenchmen	Unoccupied	Repaired	Beau Joli Salon	Beauty Supply/Salon
3833 Frenchmen	Unoccupied	Repaired		
3831 Frenchmen	Unknown	Unknown		
Frenchmen St	Occupied	Repaired	Smokin Joe's Restaurant and Catering	Restaurant
3821 Frenchmen	Occupied	Repaired	Friend's Salon	Beauty Supply/Salon
3817 Frenchmen	Occupied	Repaired	New Image Barbershop	Beauty Supply/Salon
3815 Frenchmen	Occupied	Repaired	La La Elegance	Clothing
3807 Frenchmen	Occupied	Repaired	IIK Studio	Beauty Supply/Salon
3807B Frenchmen	Occupied	Repaired	Gentilly Independent Insurance Agency	Insurance
3807 Frenchmen	Occupied	Repaired	Gentilly Taxes	Taxes/Cash Advance
3804 Frenchmen	Unknown	Unknown	Flooring Source USA	Home Repair/Supply
3745 Frenchmen	Occupied	Repaired	A-1 Auto & Tire Repair	Auto Parts/Repair
2164 Milton	Occupied	Repaired	Me Me's Creole Kitchen	Restaurant

ELYSIAN FIELDS AVE & GENTILLY BLVD

ADDRESS	OCCUPANCY	REPAIR STATUS	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
3740 Elysian Fields	Occupied	Repaired	Whitney Bank	Bank
3800 Elysian Fields	Occupied	Repaired	State Farm Insurance	Insurance
3808 Elysian Fields	Unknown	Unknown		
3810 Elysian Fields	Occupied	Repaired		Beauty Supply/Salon
3820A Elysian Fields	Unknown	Unknown	Sterken Advertising	
3820B Elysian Fields	Occupied	Repaired	Cabinets & Granite	Home Repair/Supply
3822 Elysian Fields	Unknown	Unknown		
3826 Elysian Fields	Occupied	Repaired	Reggie's Flowers	Florist
3830 Elysian Fields	Unknown	Unknown		
3830.5 Elysian Fields	Unknown	Unknown		
3836 Elysian Fields	Occupied	Repaired	Regions Bank	Bank
3221A Gentilly	Unoccupied	Repaired	Wing Zone	Restaurant
3221B Gentilly	Unoccupied	Repaired		
3201 Elysian Fields	Occupied	Repaired	Discount Cigarette Store	Gas/ Convenience
3216 Elysian Fields	Occupied	Repaired	Walgreens	Drug Store
3231 Elysian Fields	Occupied	Repaired	Chase	Bank
4201 Elysian Fields	Occupied	Repaired	Capitol One	Bank
4223 Elysian Fields	Occupied	Repaired	Angel Care	Day Care
4233 Elysian Fields	Occupied	Repaired	Mike's Hardware	Hardware Store
4237 Elysian Fields	Occupied	Repaired	Elysian Fields Animal Clinic	Veterinarian
4301 Elysian Fields	Occupied	Repaired	Elysian Fields Medical Center	Medical
4313 Elysian Fields	Unoccupied	Unknown	Sno Balls	Restaurant
4319 Elysian Fields	Unknown	Unknown	Top Roots	Beauty Supply/Salon
4335 Elysian Fields	Unknown	Unknown	Pete's Plumbing	Plumber
4339 Elysian Fields	Occupied	Unknown	The Original New Orleans Sno Ball	Restaurant
3239 Gentilly	Unoccupied	Unrepaired	Vision Source	Optometrist
Gentilly Blvd	Unoccupied	Unrepaired	Beauty Supply	Beauty Supply/Salon
3245 Gentilly	Occupied	Repaired	Boyd Brooks	Funeral Services
3800 Frenchmen	Unoccupied	Repaired	For Lease (Second Floor)	



Village Commons Shopping Center. Wesley Chapel NC.

NEIGHBORHOOD SHOPPING

Neighborhood shopping comprises those retail centers that:

- a) have between 75,000 square feet of retail space (excluding banks, hotels, and storage facilities) and 200,000 square feet;
- b) tend to be located at the intersection of two major neighborhood arterials;
- c) tend to feature grocery stores as prime anchors, along with smaller tenants (both chains and independents);
- d) feature more convenience goods than comparison goods; and
- e) are usually set back from the street in “strip mall” form, providing ample off-street parking.

Based on these characteristics, three retail areas are classified as neighborhood shopping: Paris and Robert E. Lee Blvd. (former Lake Terrace Shopping Center); Paris and Mirabeau Avenues (Oak Park Shopping Center); and Franklin Avenue and Leon C. Simon Drive.

ROBERT E. LEE & PARIS

Lake Terrace Shopping Center anchors the commercial intersection of Robert E. Lee Boulevard and Paris Avenue. These two major bi-directional distributors carry four lanes of traffic and connect many New Orleans neighborhoods and institutions. The Lakefront Campus of the University of New Orleans, for instance, lies within minutes of the site and has an enrollment of nearly 12,000 students. When classes are in session, traffic volume at this intersection is notably heavier.



JANUARY 2009 OBSERVATIONS

A recent site visit finds Lake Terrace in an unrepaired state. Two original main commercial buildings, built in an “L” shape and oriented towards the intersection, have been gutted, but not repaired. The larger of the two building has had its external walls removed, exposing the interior to the elements and likely compromising the building’s structural integrity. Three stand alone gas stations were later built along Robert E. Lee in the shopping center’s surface parking area. Two of the buildings formerly served as banks, complete with drive through banking windows, while the other functioned as a gas station. The banks and gas station site are currently vacant.



Above: Aerial view of described area, Google Earth April 2009

Right: Lake Terrace main sign

INFRASTRUCTURE AND TRANSPORTATION

Grassy neutral grounds soften the hardscape of both major streets and span for miles in all directions. Here, live oak trees and native shrubbery provide foliage to passersby. Sidewalks, on the other hand, abut the street's shoulder with no buffer separating vehicular traffic from pedestrians. Many of these sidewalks blend in with curb cuts making it difficult to discern where the sidewalk begins and ends. Most street corners and intersections do not have ADA compliant curb cuts. The raised neutral grounds force people in wheelchairs to move into a vehicle travel lane to cross the street. Additionally, crosswalks, where they exist, are faded.

RTA bus routes, present at this intersection before Katrina, have since been rerouted leaving the area with no alternate modes of transportation. Neither Robert E. Lee Boulevard nor Paris Avenue have been resurfaced or restriped.



Above: A main structure of Lake Terrace Shopping Center

Left: Lake Terrace accessory retail





All: Images of Oak Park Shopping Center



PARIS & MIRABEAU

On the south-east corner of the intersection of Paris Avenue and Mirabeau Avenue is the Oak Park Shopping Center. It is located at the center of Paris Avenue within the Gentilly area. Much of the commercial businesses here are in the process of rebuilding and redevelopment. Some businesses are currently open as they continue to make repairs.

JANUARY 2009 OBSERVATIONS

The main strip center is partially occupied with the United Teachers of New Orleans organization, a Cash Advance, a dry cleaning business and the Gentilly Senior Center. However still, less than half of the potential store fronts are open.

Perpendicular to the main strip center is a Dollar General retail store that has recently opened. The photographs to the left shows the new paint finish of this soon to open business and the refurbished sign on Paris Avenue ready for incoming businesses to the Oak Park Shopping Center.

Next door is the Great Wok Chinese Food restaurant that is occupying the location of a previous fast food chain. Next door, and sharing the parking lot with the Oak Park Shopping Center, is the Laundry Basket, a coin laundry mat. The Laundry Basket is also a converted fast food chain store that has been redeveloped to serve a major public need.



Behind the Oak Park Shopping Center at Paris Avenue and Wakefield Avenue is a newly renovated office complex available for rent. It is surrounded by a mechanized gate that maintains a landscaped exterior with carport covers. It also shares a property line with the local law enforcement office.

INFRASTRUCTURE AND TRANSPORTATION

Only a few blocks north of this area are two high schools in the process of being built. The Lake Area High School is being built by the New Orleans Recovery School District and the Holy Cross School is being relocated and built on Paris Avenue. The Lake Area High School, while still under construction, is already holding classes for students.

Above: Aerial view of described area, Google Earth April 2009
 Below: Lake Area High School, under construction



PARIS AVENUE & MIRABEAU AVE RETAIL STATUS

ADDRESS	Occupancy	REPAIR	TYPE OF BUSINESS	NAME OF ESTABLISHMENT
4700-4760 Paris Ave	Partially Occupied	Repairing	Strip Mall	Oak Park Shopping Center
4774 Paris Ave	Unoccupied	Repairing	Retail	Dollar General Store
1554 Mirabeau Ave	Unoccupied	Repairing	Restaurant	Great Wok Chinese Food
1530 Mirabeau Ave	Occupied	Repaired	Coin Laundry	Landry Basket
Paris & Wakefield	Unoccupied	Repaired	Gated Office	-----



Above: Aerial view of described area, Google Earth, April 2009

Below: panoramic views of the Rouse's shopping center and parking lots



FRANKLIN & LEON C. SIMON

A shopping center characterizes the north-west corner of the intersection. This shopping center is anchored by the Rouses supermarket in the center of a strip of commercial suites. The east side aligns a Subway restaurant, a Smoothie King, a dry cleaner and a finance establishment. They are all repaired and operating. On the west side, left of the Rouses, a Curves occupies one street front but the other three are vacant. The corner is occupied by a restaurant, Café Roma, a non franchise establishment. There is one unattached structure. Pre-Katrina, it was occupied by a Kinko's and is currently under repair. Large parking spaces are available in front of the commercial strip. Walking is possible under the canopy.

JANUARY 2009 OBSERVATIONS

The former Kinko's is being renovated and will accommodate a Quizno's restaurant in a near future. It is unclear how much space the fast-food restaurant will use but space dividers are already installed.

The Franklin Avenue and Leon C. Simon Drive intersection has constant but not heavy traffic coming in and out the shopping center. Although crossing is possible and lines are marked on the ground, it is adventurous given the narrow sidewalks at 3 corners of the intersection. The only sidewalks in good repair are located near the Franklin bus stop. This bus stop has the only shelter along this street.



Above: Rouse’s Supermarket, anchor of the area



Above: Former Fed-Ex Kinko’s



Above: Café Roma (west end)

INFRASTRUCTURE AND TRANSPORTATION

The Regional Transit Authority operates a bus route along Franklin Avenue. The 57 Franklin Avenue bus route was previously the Gentilly 57-Franklin Avenue streetcar line. Buses leave from the corner of North Rampart and Canal, run on St Claude Avenue making a left turn on Franklin Avenue. At the intersection of Franklin and Leon C. Simon , the route turns right and ends on Press. Weekdays, buses run approximately every 30 minutes from 6 am to 5pm . The service continues to 11pm with a service every hour. The route is served on Saturdays, Sundays and holidays once an hour. A dozen bus stops are located at the main intersections from Franklin Avenue and the I-610 to Franklin Avenue and Leon C. Simon Drive. The only bus shelter on Franklin Avenue is installed at the northern intersection of Franklin Avenue at Leon C. Simon Drive. This bus shelter is easily accessible from the Rouse’s commercial strip.

FRANKLIN AVENUE & LEON C SIMON RETAIL STATUS

ADDRESS	OCCUPANCY	STATUS	TYPE OF BUSINESS	NAME OF ESTABLISHMENT
660 Franklin	vacant	under repair	unknown	unknown
6600 Franklin, Ste A1	occupied	repaired	Restaurant	Café Roma
6600 Franklin, Ste A2-5	unknown	unknown	unknown	unknown
6600 Franklin, Ste A6	occupied	repaired	service	Curves
6600 Franklin, Ste A7	occupied	repaired	grocery retail	Rouses Market
6600 Franklin, Ste A8	occupied	repaired	service	American General Finance
6600 Franklin, Ste A9	occupied	repaired	service	USA Cleaners
6600 Franklin, SteA10	occupied	repaired	fast-food retail	Smoothie King
6600 Franklin, Ste A11	occupied	repaired	fast-food retail	Subway



Lake of the Ozarks Central Shopping District
5740 Highway 54 Osage Beach, MO.

PEDESTRIAN SHOPPING

Pedestrian shopping comprises those retail centers that:

- a) have no more than 75,000 square feet of retail space (excluding banks, hotels, and storage facilities);
- b) tend to be located on relatively minor neighborhood streets
- c) tend to feature smaller neighborhood-level businesses (more often independent businesses);
- d) feature convenience goods; and
- e) usually have street frontage or shallow parking frontage.

Based on these characteristics, the pedestrian shopping areas include: Elysian Fields and Robert E. Lee, Elysian Fields and Filmore, Mirabeau and St. Anthony, St. Roch and Prentiss, Gentilly and Paris, Foy and St. Bernard, Franklin and Robert E. Lee, Franklin and Filmore, Franklin and Jasmine, and Clematis and Clover.

Although these are referred to as pedestrian shopping centers, this does not imply most people walk to them. Some are gas stations or other auto oriented businesses.

ELYSIAN FIELDS & FILMORE

Elysian Fields Avenue is a major north-south distributor that is often considered a boundary between neighborhoods in Gentilly. It carries a speed limit of 35 miles per hour throughout its length in the project area (Stephen Girard Street on the south to Leon C. Simon Drive on the north). In this same stretch, Elysian Fields is comprised of two traffic lanes and a narrow parking lane (many residents have driveways or park partially on the curb) on both its northbound and southbound sections. A large central neutral ground spans the length of the project area. Its character is largely residential, though major intersections tend to support commercial.



Left: Aerial Map of the intersection, Google Earth April 2009

Filmore Avenue is an east-west collector street that spans the length of Gentilly. It carries a speed limit of 30 miles per hour. The street features a spacious median.

The node between Elysian Field Avenue and Filmore Street is a typical T-intersection of two major streets, Elysian Fields being the larger of the two. All four corners host or once hosted retail or commercial uses.

JANUARY 2009 OBSERVATIONS

This node was heavily damaged during Hurricane Katrina, as more than five feet of water covered the general vicinity for an extended period of time. The northwest had a multiple-bay Exxon Mobil gas station that was demolished after hurricane Katrina.

The southwest corner is now the most active intersection. It has a corner bakery (Sweet Savors) and restaurants (Chinese Tea Garden, Pizza Milano) that draw significant automobile traffic. Most of this corner is occupied. A narrow strip of parking offered by the shopping center presents a problem for both pedestrians and drivers. During peak hours, nearly all spots are taken. The sidewalk is barely visible and is generally not observed by patrons arriving by automobile, who park parallel to it if the perpendicular spaces are not available.

Below: Intersection of Filmore and Elysian Fields



JANUARY 2009 OBSERVATIONS CONT'D

The northeast corner hosts a vacant former bank building, which pre-storm was Crescent City Flooring. A much smaller office space just north of this building is vacant and unrepaired.

The southeast corner once featured a Mona’s restaurant and an Italian Pie pizza restaurant. Today this site is being refurbished and will open soon as the new Canseco’s grocery. A live oak tree that flanks the parking lot near Elysian Fields is host to an informal commercial space—an individual who sells seafood out of his truck.



Left: Sweet Savors

Below: Former Mona’s and Italian Pie (Canseco’s grocery under-construction)



INFRASTRUCTURE AND TRANSPORTATION

Sidewalks are sporadic and often irregularly maintained. At the northwest corner, the sidewalk is in good repair. At the southwest corner (Sweet Savors, etc.), the sidewalk is obscured during peak hours by parked vehicles. At the northeast corner, the portion of the sidewalk facing the Crescent City Flooring building is well-maintained, but is steeply sloped. Just north, the small office building sports a parking pad that subsumes the sidewalk briefly. Farther north, the sidewalk is sporadic and often ill-maintained. On the southeast corner, there is no sidewalk.

Crosswalks are present, though the striping has faded considerably. Furthermore, many street corners are not ADA – compliant. RTA Bus stops are located at the northwest (southbound) and southeast (northbound) corners. The 55 Elysian Fields bus is the only bus Post-Katrina to stop at the intersection.

ELYSIAN FIELDS AT FILMORE AVE RETAIL STATUS

ADDRESS	STATUS OF OCCUPANCE	STATUS OF REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
5217 Elysian Fields	Occupied	Repaired	Commercial retail	Canseco’s
5217 Elysian Fields	Occupied	Repaired	Commercial retail	Canseco’s
5301 Elysian Fields	Unoccupied	Unrepaired	Former commercial retail	Former Crescent City Floors
5315 Elysian Fields	Occupied	Repaired	Restaurant	Sushi and Hibachi
5218 Elysian Fields	Occupied	Repaired	Commercial retail	Cabinets and Granite
5220 Elysian Fields	Occupied	Repaired	Commercial retail	New York Nails
5222 Elysian Fields	Unknown	Unknown	Unknown	Unknown
5224 Elysian Fields	Occupied	Repaired	Commercial retail	Lovely Hair Design
5226 Elysian Fields	Occupied	Repaired	Restaurant	Pizza Milano
5228 Elysian Fields	Unknown	Unknown	Unknown	Unknown
5240 Elysian Fields	Occupied	Repaired	Commercial	Angela’s Dry Cleaners
5242 Elysian Fields	Occupied	Repaired	Restaurant	Sweet Savors Bakery
2178 Filmore	Unknown	Unknown	Unknown	Unknown
2174 Filmore	Unknown	Unknown	Unknown	Unknown
2170 Filmore	Occupied	Repaired	Restaurant	Chinese Tea Garden
5300 Elysian Fields	Unoccupied	Unrepaired (demo)	Former commercial	Former Exxon Gas Station

ELYSIAN FIELDS & ROBERT E. LEE



Above: Aerial map of the intersection
Google Earth
April 2009

Elysian Fields Avenue is a major north-south distributor. It carries a speed limit of 35 miles per hour in the project area. In this same stretch, Elysian Fields is comprised of two traffic lanes and a parking lane on both its northbound and southbound sections. A large central neutral ground spans the length of the project area as well. Its parking lot, though no longer maintained, rests just to the north and contained roughly 30 spaces. Just to the north of this parking lot was the old Ferrara's Supermarket. Today it has been razed and remains a vacant concrete lot.

On the east side of the Elysian Fields, north of Robert E. Lee is one of the area's chief anchors, a Walgreens store. Its parking lot faces the intersection of Robert E. Lee and Elysian Fields. On the west side of the street, opposite Walgreens, is a recently renovated and reoccupied Papa's Pizza.

Major T-intersections include those of Elysian Fields and Robert E. Lee Boulevard and Elysian Fields and Leon C. Simon Drive. All three roads are major streets with neutral grounds. The portion of Robert E. Lee west of Elysian Fields is primarily residential and traffic moves much more slowly. Leon C. Simon is a larger, faster boulevard on either side of Elysian Fields. Robert E. Lee features one driving lane in each direction. If on-street parking is allowed, it is rarely, if ever, used. Leon C. Simon Drive features two driving lanes and a narrow parking lane. Due to the presence of the University of New Orleans, a handful of drivers will choose to park on Leon C. Simon Drive, but this is not common.

Elysian Fields Ave and Robert E Lee Blvd are part of a complex node with several intersections. It functions as a business district for both the University of New Orleans and greater Gentilly, especially the lakefront portion.



Above: Robert E Lee and Elysian Fields Anchor: Walgreen's

Below: Intersection of Robert E Lee and Elysian Fields



JANUARY 2009 OBSERVATIONS

This node was heavily damaged during Hurricane Katrina, as more than six feet of water covered the general vicinity for an extended period. Several commercial properties in the node have been recently demolished. On the east side of Elysian Fields, between Madrid and Robert E. Lee, the following structures have been torn down (starting south, moving north): a Wendy's fast food restaurant surrounded by parking; a strip center whose chief tenant was a laundry-mat facility; and a gas station.

On the west side of the street, opposite the previously mentioned block face, is a large two-story modernist office building presently being converted into an accounting office. Its parking lot is located to the north and contained roughly 30 spaces. Just to the north of this parking lot was the old Ferrara's Supermarket. Today, it has been razed and is a vacant, concrete lot.

On the east side of the Elysian Fields, north of Robert E. Lee is one of the district's chief anchors, a Walgreens store. Its parking lot faces the intersection of Robert E. Lee and Elysian Fields. On the west side of the street, opposite Walgreens, the newly opened business Papa's Pizza is surrounded by a spacious parking lot (approximately 25 spaces).

On the east side of Elysian Fields, north of Mexico Street, is another series of businesses: a one-story commercial building that sports a daiquiri shop, a six-story office building whose ground level is a Capital One bank branch; and a two-story commercial building that houses a Lafitte's Cafe and State Farm Insurance offices. Opposite these structures are a Shell gas station and a Burger King fast food restaurant.

INFRASTRUCTURE AND TRANSPORTATION

Sidewalks are sporadic and often irregularly maintained. Autocentric businesses south of Robert E. Lee on Elysian Fields front-facing parking, much like the southwest corner of Elysian Fields Avenue and Filmore Street. Crosswalks are present, though the striping has faded considerably. All crossings need to be restriped.

Southbound RTA bus stops are located on the west side of Elysian Fields, just north of Mexico Street as well as at Robert E. Lee. Northbound bus stops are located on the east side of Elysian Fields just south of the intersection of Robert E. Lee and Elysian Fields and at Leon C. Simon. The 55 Elysian Fields bus is the only bus Post-Katrina to stop within the surrounding area.

ELYSIAN FIELDS AT ROBERT E. LEE RETAIL STATUS

ADDRESS	STATUS OF OCCUPANCE	STATUS OF REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
6100 Elysian Fields	Unoccupied	Unrepaired	Former Doctor's Office	Unknown
6166 Elysian Fields	Unoccupied	Unrepaired (demo)	Former Retail	Former Ferrara's Grocery
6220 Elysian Fields	Occupied	Repaired	Restaurant	Papa's Pizza
6232 Elysian Fields	Unoccupied	Unrepaired	Former Restaurant	Former Popeye's
6300 Elysian Fields	Occupied	Repaired	Commercial Retail	Shell Gas Station
6332 Elysian Fields	Occupied	Repaired	Restaurant	Burger King
6325 Elysian Fields	Occupied	Repaired	Restaurant	Lafitte's Café
6305 Elysian Fields	Occupied	Repaired	Commercial	Capitol One
6301 Elysian Fields	Occupied	Repaired	Restaurant/Bar	Daiquiris & Company
6201 Elysian Fields	Occupied	Repaired	Commercial Retail	Walgreens

ST. ROCH AVE AT PRENTISS AVE

The St. Roch/Prentiss node is a T-intersection of which all four corners are commercially zoned. St. Roch Avenue is an interior north-south distributor with one traffic lane in each direction. It is set apart from surrounding north-south streets in that it sports a neutral ground. Most other streets are somewhat narrow and are residential in character. Prentiss Avenue is an east-west distributor that spans most of the Gentilly District (uninterrupted from Peoples Avenue, on the east, to Bayou St. John, on the west). Like St. Roch, Prentiss also features a central median. It has no lane striping as of the present, and is likely wide enough for two traffic lanes, but it appears that only one lane is used.



Above: Aerial map of the intersection, Google Earth, April 2009

The St. Roch/Prentiss node is unique in the Gentilly District because neither street is a major corridor; the overwhelming majority of commercial areas within the district are located along major streets such as Elysian Fields Avenue, Robert E. Lee Boulevard, Franklin Avenue, and other streets similar in size, speed, and character.

JANUARY 2009 OBSERVATIONS

Though Hurricane Katrina severely flooded the St. Roch/Prentiss node with at least seven feet of water for an extended period, only one corner has witnessed demolition (the southeast) and is now a vacant lot. Located on the northeast corner is a one-story brick commercial building. The building appears to be well maintained but empty. The front-facing parking lot offers eleven spaces. The northwest corner of the node has an unoccupied, boarded one-story commercial building (repair status is difficult to determine).

The southwest corner has three commercial buildings that extend westward along Prentiss Avenue. The corner-facing building is a one-story building that is currently unoccupied and unrepaired. It is a former automotive repair shop. Parking was available in the front and side of the structure. West of this structure is a diminutive, one-story shotgun-style commercial building that hosts the Bacchus Lounge. Repair status is unclear. The building is now empty and unoccupied. The building appears to offer no off-street parking. West of the Bacchus Lounge is a two-story brick commercial building with an open and active business, A-Z Framing. A small, front-facing parking pad provides approximately three parking spaces.

INFRASTRUCTURE AND TRANSPORTATION

Sidewalks within the node are sporadic and, when existent, are in need of maintenance and beautification. Where parking pads are present, as with A-Z Framing, and at the northwest corner of the node, the sidewalk disappears and is subsumed by parking. Adjacent to the residential areas of both St. Roch and Prentiss, the sidewalk resumes. Both St. Roch and Prentiss Avenues are in need of repaving, as potholes and other imperfections present challenges for cyclists.

The Regional Transit Authority (RTA) 55 Elysian Fields and 57 Franklin buses are located four blocks west and four blocks east of the node, respectively. There are no buses that run through the node. There are no roads with bicycle lanes within the node, either, though sufficient road space and low traffic volume render cycling a safe transit option to the area.

ST ROCH AVE AT PRENTISS ST. RETAIL STATUS

ADDRESS	STATUS	OCCUPIED	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
2354 Prentiss	repaired	occupied	A-Z Framing	frame company
2366 Prentiss	unrepaired	vacant	(former) Bacchus Lounge	tavern/bar
5690 St. Roch	unrepaired	vacant	unknown	automotive services
2401 Prentiss	unknown	unknown	unknown	unknown
2400 Prentiss	vacant lot	vacant	unknown	unknown
5700 St. Roch	unrepaired	vacant	unknown	unknown

Below: A to Z Framing



Below: Bacchus Lounge



Below: Corner of Prentiss and St. Roch Ave



CLEMATIS STREET CORRIDOR



Above: Aerial map of area, Google Earth, April 2009

The Clematis Street Corridor node is located along a neighborhood street in the Gentilly Terrace neighborhood with a three block concentration of commercially zoned activity. Clematis Street is an interior northwest-southeast collector street with one traffic lane in each direction. The Clematis Street Corridor node is bounded by Jonquil Street to the north and Acacia Street to the south. The commercial node is centrally located between Elysian Fields Avenue, Gentilly Boulevard, Franklin Avenue and I-610. These major streets serve as pedestrian walking boundaries for the node. Surrounding land uses consist primarily of single-family homes to the west and two-family homes to the east.

JANUARY 2009 OBSERVATIONS

Hurricane Katrina caused significant damage but the worst of the flooding was mitigated because of the proximity to the natural ridge running through the Gentilly Terrace neighborhood. Flood levels ranged primarily between two and four feet and damage estimates were approximately 30%.

The Clematis Street Corridor node consists of seven commercial properties that mainly serve the immediate needs of the surrounding neighborhood. To date, four of the seven pre-Katrina neighborhood businesses have returned, which offer vital services to nearby residents.

Most commercial developments are one or two story buildings and have parking in the front. Of the re-opened businesses, T & H Grocery is in the center of the commercial node, which is a live/work space. Also opened are Marie's Kitchen (Skinny's Tavern) and Brown Derby, along with T & H Grocery, these businesses offer neighborhood restaurants, drinking establishments and convenience food items. Additionally, Avenue Community Automotive Center & Repair is an auto/tire repair service on the west side of Clematis Street in the southern portion of the node and provides the only non-food related service in the area.

The three businesses that remain closed (Andreas's Hair Studio, Clematis Bar and a small office) are in a state of disrepair; all are secure but require renovation before being reopened for retail use.

INFRASTRUCTURE AND TRANSPORTATION

Currently, Clematis Street, the main north-south street running through the node, is in fair condition and relatively free of potholes and breaks. It was reconstructed after Hurricane Katrina. Many of the neighborhood connecting streets travel through the centrally located node and allow easy access by automobile from Franklin Avenue, Gentilly Boulevard or Elysian Fields Avenue. The neighborhood collectors funnel traffic through the node and serve as arterial connections to the rest of Gentilly.

Sidewalks are in good condition. Beautification projects such as street trees and landscaping could further improve the pedestrian environment. Where sidewalks are missing, they are replaced by parking spaces or drives for the commercial uses. All sidewalks and walkways throughout the node are ADA accessible. Public transportation is well provided to the area with bus lines running on Elysian Fields Avenue (Line 55), Franklin Avenue (Line 57), and Gentilly Boulevard (Line 94).

Right: T & H Grocery (live/work)
 Lower left: Brown Derby
 Lower right: Clematis Bar (vacant)



CLEMATIS STREET CORRIDOR RETAIL STATUS

ADDRESS	STATUS	OCCUPIED	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
3829 Clematis St	Repaired	Occupied	Marie's Kitchen / Skinny's Tavern	bar/restaurant
3901 Clematis St	Unrepaired	Vacant	unknown	office
3821 Clematis St	unknown	Vacant	Andrea's Hair Studio	hair salon
3737 Clematis St	Repaired	Occupied	Brown Derby	food/beer/convenience
3700 Clematis St	Repaired	Occupied	T & H Grocery	restaurant/beer/convenience
3664 Clematis St	Unrepaired	Vacant	Clematis Bar	bar
3666 Clematis St	Repaired	Occupied	Avenue Community Automotive Center & Repair	auto/tire repair

FRANKLIN & ROBERT E. LEE



Above: Aerial map of the intersection, Google Earth April 2009

The intersection of Franklin Avenue and Robert E. Lee Boulevard has auto-oriented businesses including a large carwash and, a Chevron station with gas and auto services. Empty commercial suites are located next to the Chevron gas service on the Robert E. Lee side.

A medical service is located between the Chevron station and discount convenience store. This store has a large amount of front-facing parking available. The Franklin Avenue Pharmacy, across from the carwash, had been closed since Katrina but is scheduled to reopen by summer 2009.

JANUARY 2009 OBSERVATIONS

Parking is widely available around the Robert E. Lee commercial area. Around the gas service, parking is ample for the customers. Next door, the dental office benefits from this parking surplus. The convenience store on Franklin appears to have a parking square footage much larger than its own building footprint. The empty commercial suites have limited front parking.

Below: Available suites on Robert E. Lee, next to the Chevron station



Below: Intersection of Franklin and Robert E. Lee, west side



TRANSPORTATION AND INFRASTRUCTURE

Franklin Avenue and Robert E. Lee form a large intersection that accommodates a neutral ground. Businesses are located on three corners of the intersection. Adequate side walks are available and crossings are neatly marked. Large spaces around the Chevron station allow for an easy walk to the convenience store or the dentist office. Sidewalks around the carwash are narrow and damaged.



Above: Franklin Ave Pharmacy, NE corner of the intersection



Right: Chevron Station

FRANKLIN AT ROBERT E LEE RETAIL STATUS

ADDRESS	STATUS	OCCUPIED	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
6201 Franklin	under repair	vacant	(former) Franklin Pharmacy	retail
6201 Franklin	under repair	vacant	unknown	unknown
6139 Franklin	repaired	occupied	Franklin Wash Service	car wash service
6132 Franklin	repaired	occupied	Chevron Gas Station	gas/repair service
6120 Franklin	repaired	occupied	Dr. Saloy Dental Office	medical service
6100 Franklin	repaired	occupied	Franklin Discount	retail convenience store

Below: Intersection of Franklin and Robert E. Lee. East side



FRANKLIN & FILMORE



Above: Aerial map of the intersection, Google Earth, April 2009

This node is pedestrian friendly and on-site parking is available. The majority of buildings are stand alone. Franklin Avenue has a neutral ground between the north and south lanes. A large abandoned institutional structure, formerly the Milne Boys Home, is located on the west side of the corridor.

JANUARY 2009 OBSERVATIONS

Pedestrian traffic is significantly less than it was prior to Hurricane Katrina, largely due to the closing of the Milne Boys Home. There are several occupied businesses in the area and during peak hours both pedestrian and automobile traffic are present. The presence of nearby park and ball field also to attract youth from the immediate area.

TRANSPORTATION AND INFRASTRUCTURE

Franklin and Filmore Streets are in better condition than other similar streets in Gentilly. The sidewalks are well maintained, but crosswalks are faded. The condition of the sidewalks and streets make the area conducive to bicyclists and other non-motorized wheeled traffic. Public transportation options are present with bus stops on Franklin Avenue.



Above: Juju Bag Café with a barber shop and massage parlor

Below: Intersection of Franklin and Filmore, west side



Below: Merlin's Place, a popular restaurant



Below: Happy Discount Market



FRANKLIN AVE AT FILMORE ST RETAIL STATUS

ADDRESS	STATUS	OCCUPIED	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
5363 Franklin	repaired	occupied	JuJu Bag Café	Coffee Shop/Entertainment
5359-61 Franklin	unrepaired	vacant	unknown	unknown
5357 Franklin	repaired	occupied	Young's Cleaning & Restoration	commercial service
5335 Franklin	repaired	occupied	Certified Restoration Drycleaning	commercial service
5339 Franklin	under repair	vacant	unknown	unknown
5328 Franklin	unrepaired	vacant	formerly Vasquez	previous use Restaurant
5325 Franklin	repaired	occupied	Merlin's Place	Restaurant
5323 Franklin	repaired	occupied	Hankel Electric LLC	commercial service
5321 Franklin	repaired	occupied	Cousin's Seafood	Restaurant
5301 Franklin	repaired	occupied	Happy Discount	convenience/gas retail

Below: Intersection of Franklin and Filmore, east side



FRANKLIN AVE & JASMINE ST

JANUARY 2009 OBSERVATIONS

The intersection of Franklin Avenue and Jasmine Street provides a variety of professional services such as an insurance agency, a family help service, an open dental office and a tax service. Additionally, a neighborhood drinking establishment is located between the tax service and a dental office.

One blemish is the dilapidated building on Jasmine Street contrasts with the well maintained structure of the State Farm Insurance building .

TRANSPORTATION AND INFRASTRUCTURE

The Franklin Avenue and Jasmine Street intersection do not have striped crosswalks, but the adjacent sidewalks are in well maintained condition. A bus stop is located across from the insurance agency on Franklin Ave and Jasmine Street.



Above: Aerial map of the intersection, Google Earth, April 2009



Above: Ben R. Guillory State Farm Insurance Agency



Above: Unoccupied and unrepaired buildings



Above: Ja-kels Bar on Jasmine Street

FRANKLIN ST AT JASMINE ST RETAIL STATUS

ADDRESS	STATUS	OCCUPIED	NAME OF ESTABLISHMENT	TYPE OF ESTABLISHMENT
4118 Franklin	repaired	occupied	Families Helping Families	service
4110 Franklin	repaired	occupied	Franklin Tax Service	commercial service
4111 Franklin	repaired	occupied	Ben R. Guillory State Farm	commercial service
2611Jasmine	unrepaired	unknown	unknown	unknown
26 11.B. Jasmine	unrepaired	unknown	unknown	unknown
2613 Jasmine	repaired	occupied	Ja-kels	Entertainment
2619 Jasmine	repaired	occupied	Doctor Wilks	dental service

PARIS & GENTILLY



Right: Aerial map of intersection, Google Earth, April 2009

Paris Avenue and Gentilly Boulevard intersect on an angle, cross cutting the dominant north south grid system characteristic of the surrounding subdivisions.

The streets act as major distributors, each carrying four lanes of high volume, fast flowing bi-directional traffic. Where they intersect exists a neighborhood business district that maintains a diverse array of businesses and retail spaces. Just minutes to the east on Gentilly Boulevard resides the campus of Dillard University—a Historic Black College or University with nearly 1,000 full time students. To the west lies the Fairgrounds Racetrack.

Older neighborhood businesses continue to operate out of small storefronts that line Paris Avenue just south of Gentilly Boulevard. These spaces have an intimate relationship with the street and tie in well with the scale and architectural aesthetic of the abutting residential neighborhood. Currently a nail salon, a daycare center and restaurant occupy these spaces. Other similarly situated properties sit vacant, but once housed a corner grocery store, tavern and beauty salon.

In recent years, new investment has moved into the area. These businesses offer drive thru and one stop shopping and appeal to broader clientele than the neighborhood serving businesses that once dominated the district. A recent visit to the site found an endless flow of cars in and out of the three auto-centric businesses that anchor this intersection—two gas stations and a fast food restaurant.

JANUARY 2009 OBSERVATIONS

Businesses clustered around the intersection were heavily damaged due to flooding from Hurricane Katrina. The extent of the devastation is made most apparent by the unrepaired and unsecured commercial spaces that remain three and a half years since Hurricane Katrina. Yet in comparison to other commercial corridors along Paris Avenue (most notable the shopping centers of Lake Terrace and Oak Park), retailing at this commercial node has been quick to return.



Above: Gas station at Paris and Gentilly



Right: Intersection of Paris Ave and Gentilly Blvd

A brief survey found that nearly 80% of the retail space at this intersection is currently occupied. For example, a small strip of retail spaces north and west of the intersection hosts a clothing retailer and a barber shop. A large warehouse just west of the intersection is occupied and operated by St. Vincent De Paul's retail and resale store .

INFRASTRUCTURE AND TRANSPORTATION

Narrow neutral grounds soften the landscape of both major streets and widen as they approach the intersection. Sidewalks adjacent to businesses are moderately well maintained, but pedestrian connections to the other parts of the neighborhood, where they exist, are poor. Around the gas stations and fast food restaurant, curb cuts allow unrestricted vehicular access across the sidewalk. The roadways are in need of resurfacing and restriping. Crosswalks are faded. On-street and off-street parking is ample.

RTA designated bus stops are located on all four corners of the intersection. The 52-St. Bernard bus and the 94-Broad bus service this intersection.

PARIS AVE AT GENTILLY BLVD. RETAIL STATUS

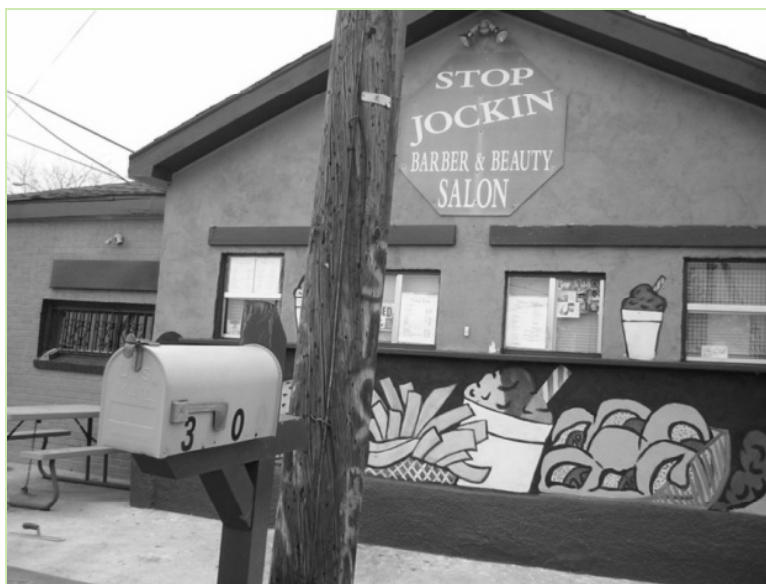
ADDRESS	STATUS OF OCCUPANCY	STATUS OF REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
4321 Paris Ave	Unoccupied	Repairing	Grocery	Easy Pack Food Store
---- Paris Ave	Unoccupied	Unrepaired	Restaurant	Unknown
4327 Paris Ave	Occupied	Repaired	Locksmith & Key Service	Rock's Safe Lock & Key Service
2035 Gentilly Blvd	Occupied	Repaired	Gas & Convenience	Shell Gas Station
2000 Gentilly Blvd	Occupied	Repaired (new)	Fast Food	Popeye's Chicken
3120 Paris Ave	Occupied	Repaired	Paint & Decorating	Paint Pro Depot
3116 Paris Ave	Occupied	Repaired	Custom T-shirts	House of Tees
3114 Paris Ave	Occupied	Repaired	Barber	Cutz Barbershop
3112 Paris Ave	Unoccupied	Repaired	For Lease	Formerly Cash Checking
2025 Gentilly Blvd	Occupied	Repaired	Gas & Convenience	Spur Gas Station
2013 Gentilly Blvd	Unoccupied	Unrepaired	Tavern	Lounge
2001/2005 Gentilly Blvd	Unoccupied	Unrepaired	Office/Industry	Bonnie-Frances Lingerie Co.
1995 Gentilly Blvd	Occupied	Repaired	Thrift Store/Warehouse	St. Vincent de Paul Store
3040 Paris Ave	Unoccupied	Unrepaired	Grocery	Paris Ave Grocery
3033 Paris Ave	Occupied	Repaired	Daycare	D.J.'s Learning Castle Daycare
	Occupied	Repaired	Barber	Touch of Paris Barber Shop
3035 Paris Ave	Occupied	Repaired	Union	Iron Workers Local No.58
	Occupied	Repaired	Nail Salon	T&L Nails
3041 Paris Ave	Occupancy	Repaired	Restaurant	Nicole's Creole Cuisine
3405 Paris Ave	Unoccupied	Unrepaired	Music Sales	Gimmick Records, Tapes, CDs
3433 Paris Ave	Occupied	Repaired	Grocery & Food	Lucy's Supermarket
3500 Paris Ave	Unoccupied	Unrepaired	Club? Unknown	Unknown

Below: Intersection of Paris Ave & Gentilly Blvd.





Above: Aerial map of described area, Google Earth April 2009



Above: Salon and Snow Ball shop

ST. BERNARD & FOY

JANUARY 2009 OBSERVATIONS

Many businesses in St. Bernard are currently being repaired, although few have yet to be completed. Scheduled completion for many of these businesses is summer of 2009.

Prior to Hurricane Katrina, there were four grocery stores in this area. Only one of them, Spider Meat Grocery on St. Bernard Avenue, is currently open. Other grocery stores including Safari Market and Liberty Food Store on St. Bernard Avenue, and AG (Associated Grocery) Food Stores have not reopened and it is unknown if they are in the process of repair. These grocery stores were family businesses that provided retail of groceries as well as well as general merchandise.



Above: neighborhood Spider Meat Grocery

Below: Safari Market & P.J.'s Restaurant



INFRASTRUCTURE AND TRANSPORTATION

Liberty Food Store on St. Bernard Avenue and Foy Street, prior to Katrina, were part of a small strip center that provided several services including a dental office and two unknown businesses. Another building adjacent to the center also provided commercial business. None of these businesses have been repaired and do not appear to be occupied.

Within the St. Bernard neighborhood, two businesses are currently open to the community. On Hamburg Street, P.J.'s Restaurant and Bar provides the only prepared food service other than Spider Meat Grocery to this area. Furthermore, an unnamed barber shop can be found on Lafreniere Street.



ST BERNARD AVE AT FOY ST. RETAIL STATUS

ADDRESS	OCCUPANCY	REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
3501 Hamburg St.	Occupied	Repaired	Restaurant	P.J.'s Restaurant & Bar
1523 Lafreniere St.	Occupied	Repairing	Barber	Barber
3537 Sere St.	Unoccupied	Unrepaired	Grocery	Associated Grocery (AG)
1484 Sere St.	Unoccupied	Unrepaired	Tavern/Club/Restaurant	
3938 St. Bernard	Unoccupied	Unrepaired	Grocery	Safari Market
3920 St. Bernard Ave	Unoccupied	Unrepaired	Strip Mall w/ Vacant Building	Liberty Food Store, Dentist, + 2 other vacant fronts
3822 Alfred St.	Unoccupied	Unrepaired	Attached to Residence	
3840 St. Bernard Ave	Partially Occupied	Partially Repaired	Strip Mall	Spider Meat + 4 other fronts Stop Jockin Barber & Beaty + Snowball Stand
3600 Jumonville	Occupied	Unrepaired	Barber/Snow Ball Stand	Snowball Stand
1317 Foy St.	Unoccupied	Repairing	Outdoor Car Wash	
4108 Senate St.	Unoccupied	Unrepaired	Convenience/Food	



Above: Aerial map of the intersection, Google Earth. April 2009

ST. ANTHONY & MIRABEAU

St. Anthony Avenue is a minor north-south corridor that runs through primarily residential neighborhoods. Mirabeau Ave runs east-west and crosses Elysian Fields, Franklin and Paris Avenues. Both roads are comprised of two traffic lanes, compared to neighboring roads which consist of merely one two-way traffic lane. A large central median (neutral ground) spans the length of the Project Area on both avenues. Its character is primarily residential, with the only commercial uses located at the St. Anthony and Mirabeau intersection.

JANUARY 2009 OBSERVATIONS

This intersection supports a vibrant mix of commercial retail and restaurants. Johnny's Hardware, John Gendusa Bakery (located along Mirabeau) and Zimmer's Seafood (located on St. Anthony) are highly frequented by local residents. Currently, an apartment complex is being built along St Anthony, between Filmore and Selma will provide a denser population which will further support this development.

INFRASTRUCTURE AND TRANSPORTATION

Parking was limited, especially due to the popularity of Zimmer's Seafood. Sidewalks are limited, stretching only for a short bit along St. Anthony, in front of Zimmer's. Mirabeau sidewalks have been converted to parking. Patrons arrive mostly by automobile. A narrow strip of parking offered by the shopping center presents a problem for both the pedestrian and the driver. Crosswalks are in need of restriping.



Left: Zimmer's a popular take-out only seafood restaurant

Below: Intersection of St. Anthony and Mirabeau



ST. ANTHONY AT MIRABEAU

ADDRESS	STATUS OF OCCUPANCE	STATUS OF REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
4915 St. Anthony	Occupied	Repaired	Restaurant	Zimmer's Seafood
2001 Mirabeau	Occupied	Repaired	Commercial Retail	Johnny's Hardware
2009 Mirabeau	Occupied	Repaired	Restaurant	John Gendusa Bakery

FRANKLIN AVE AT I-610

JANUARY 2009 OBSERVATIONS

Franklin Avenue near the Interstate 610 on ramp has two businesses that cater to commuters. A gasoline service station is easily accessible from the I-610 exit and a well maintained structure hosts a family run day care center conveniently located near a major transportation route..

TRANSPORTATION AND INFRASTRUCTURE

Due to the increased traffic of the interstate, this intersection on Franklin Avenue is not a pedestrian friendly environment. Crosswalks striping and sidewalks are poorly maintained which decreases the ability for drivers to detect pedestrians.



Above: Daycare Center on Franklin Avenue

FRANKLIN AVE AT INTERSTATE 610 RETAIL STATUS

ADDRESS	STATUS OF OCCUPANCE	STATUS OF REPAIR	TYPE OF ESTABLISHMENT	NAME OF ESTABLISHMENT
3400 Franklin	Occupied	Repaired	Gasoline Service	Chevron
4002 Franklin	Occupied	Repaired	Service	Daycare



Above: Aerial view of the intersection, Google Earth, April 2009



Above: Chevron Station on Franklin Avenue & I-610.

Below: Aerial map of the intersection, Google Earth, April 2009



CHAPTER IV –RETAIL DEMAND

INTRODUCTION

In the post-Hurricane Katrina planning efforts, community members expressed the need for better retail quality and more variety of goods and services as well as contemporary shopping center design. Many residents would like convenient, relatively low cost goods and “one-stop shopping” provided by large department stores such as Target. Others want more and better quality family-style, full-service restaurants or a Starbucks and Borders.

Indeed, Gentilly lacks in basic services. Most of the project area reports a retail gap, meaning that the area is not well served in many retail categories. Exceptions include building materials, grocery stores, health and beauty supply, and gas stations. Residents must drive a distance to purchase clothing, books, music among other goods. In this section, the report discusses demand and expenditure patterns to help explain the limited variety of available goods. The factors that influence where retailers locate are also discussed.

The analysis also indicates that currently there is an oversupply of retail space given the reduced population and draw from nearby shopping areas (primarily those in Jefferson Parish). The projected population in the immediate future will not be enough to bring retailers to all of the available commercial space. Residents will continue to see vacancies in the upcoming years and may want to find uses for temporarily underutilized land.

The scale of retail development in project area varies greatly. Many nodes have local independent businesses in small clusters (SweetSavors Bakery on Elysian Fields Avenue at Filmore Avenue, to name just one) or local chains as anchors (the Rouses Supermarket on Leon C. Simon Drive at Franklin Avenue). The smaller clusters can be pedestrian-oriented (the

retail along Paris and St. Bernard Avenues that served the St. Bernard Housing Development) or can be sustained by people who drive by. To be vibrant, however, the volume of space in the Gentilly Woods Shopping Center and the Chef Menteur commercial corridor would require a large number of shoppers to come to the area from outside the immediate vicinity, and this is a challenge given its location and available retail in other areas.

Although Gentilly residents and businesses face many challenges when working towards desirable commercial centers, the area also has great opportunities. The area hosts four universities, bringing close to 18,000 students to the area. Many people also work in Gentilly. The universities have not been as well integrated into the neighborhoods as, for example, Loyola and Tulane uptown. Although universities can have some negative effects, a collaboration among the universities and neighborhoods that mitigates the adverse effects but encourages more development and residents could create vibrant commercial centers that serve the entire community.

EXPENDITURES

CALCULATING EXPENDITURES

Using population estimates from the ESRI business analyst, and drawing on the U.S. Bureau of Labor Statistics Consumer Expenditure Survey (2007), this analysis first estimated how much money that residents in the project area are spending annually on a variety of goods and services. The Consumer Expenditure Potential, or CEP, also known as the “potential demand” for retail in the project area, is derived by obtaining the amount of individuals’ income that is spent on specific categories (such as food away from home or clothing). These expenditure patterns are made available by the Bureau of Labor Statistics (BLS) Consumer Expenditure Survey. These spending patterns are further adjusted by region (in this case, the South) and by per capita income levels. The project area residents, with a per capita income of \$18,127, can be expected to spend 42.6% of this amount on goods and personal services. The lower the income, the higher the proportion of income spent on basic goods and services.

Residents in the project area spend around \$203 million annually on consumer goods and personal care services including auto-oriented purchases such as gas. Households spend the most on food purchases. Based on 2008 population estimates, residents in the project spend \$40.6 million on food away from home and almost \$25 million on groceries. The following table shows the expenditure estimates in 2008 and 2013. Note that the 2013 expenditures data use current information about expenditure patterns with projected incomes and does not account for changes in expenditure patterns (such as increasing costs of utilities or food).

Table 4.1: Expenditures on Goods and Personal Services by Project Area Residents

	2000	2008	2013
Per Capita Income	\$16,518	\$18,127	\$19,617
Total Population	51,476	26,337	29,501
Total Consumer Expenditure Potential	\$850,280,568	\$477,410,799	\$578,721,117
Total Consumer Spending Dedicated to Retail*	\$405,668,859	\$203,329,259	\$246,477,324
Convenience Goods	\$202,638,691	\$106,582,849	\$129,200,566
Food Away from Home	\$78,735,970	\$40,620,849	\$49,240,911
Food at Home	\$42,353,003	\$24,869,689	\$30,147,232
Drug	\$22,509,973	\$10,661,499	\$12,923,953
Personal Care Products and Services	\$10,129,488	\$5,411,113	\$6,559,393
Auto-Related	\$48,910,256	\$25,019,700	\$30,329,076
Comparison Goods	\$203,030,168	\$96,746,410	\$117,276,758
Apparel and Services	\$31,171,419	\$16,254,768	\$19,704,158
Household Furnishings and Equipment	\$35,600,011	\$20,294,352	\$24,600,972
Entertainment	\$26,987,500	\$14,143,899	\$17,145,345
Other	\$109,271,238	\$46,053,391	\$55,826,283

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

* BLS Consumer Expenditure Data (2007) was used for each year. In 2008 and 2013, 42.59% of income was spent on consumer goods and services; in 2000, lower per capita income resulted in higher proportion of income spent (47.71%).

RETENTION OF RESIDENTS' EXPENDITURES

Only a part of the total amount spent on goods and services will be retained in project area. The retention rate refers to the portion of the total spent on goods and services that is spent in a given area and is expressed as a percentage. This rate is sometimes known as the “capture rate.” The variety and availability of goods, the competition from surrounding commercial developments, and qualitative differences among shopping areas all affect the retention rates. As discussed in chapter 2, in the last decades shopping malls have been developed in growing suburban areas. The malls and the strip centers along Veterans Memorial Boulevard (and other areas of Jefferson Parish) draw shoppers from Orleans Parish. According to the Brookings Institution, in 2007, New Orleans received only approximately a third the sales tax revenue that Jefferson Parish received. Before hurricanes Katrina and Rita, it was less than half, an even more remarkable statistic when considering tourism to New Orleans (New Orleans Index, January 2009, Table 23, available www.gnocdc.org).

Shopping patterns also vary by the product being purchased. In most areas, the retention rates for products that people buy often such as groceries are higher than for those items that people buy less often. People will travel farther to purchase desired quality and style for less frequent purchases.

Convenience goods refer to goods and services that are usually bought close to home or at convenient locations. Groceries, personal care goods and services, and general items purchased at a Dollar General would be convenience goods. The retention rates for convenience goods are often high. For example, the Walgreens located at Elysian Fields Avenue and Robert E. Lee Boulevard likely retains significant consumer spending on goods such as pharmaceuticals or personal care products. Table 4.2 shows the amount spent on convenience goods in 2008 and

2013. If between 70% and 90% of the money spent on groceries, restaurants and other convenience goods is spent in the project area, the total retained would range from \$74,600,000 to \$95,900,000 annually. As retail options decrease, people might travel for goods that would be considered convenience goods. For example, people might occasionally go to Target to stock up on household products because even though although similar products are available at local variety stores, these stores have a more limited selection or quality compared to Target.

Comparison goods refer to those goods and services that people will travel farther or shop around for in order choose among different styles, quality, prices, or other characteristics. Goods such as clothing, appliances and household furnishings are comparison goods. Retention rates are usually lower for comparison goods. The project area has a limited supply of comparison goods and this also contributes to low retention rates. In 2008, if Gentilly businesses received 10% comparison good expenditures, residents would be spending approximately \$9,700,000. If 30% was retained, the amount would be \$29,000,000. Table 4.3 shows expenditures on comparison goods.

To determine an accurate retention rate for Gentilly, an analysis of local expenditures patterns would be necessary. Businesses would need to be surveyed for their annual sales, and each business would have had to track ZIP codes to see where consumers were coming from and how much they spent on particular goods. This was beyond the scope of this report, and here we give possible retention scenarios. We have also provided tables in the appendices that utilize variable retention rates to display a wide range of scenarios all at once.

Table 4.2: Retention Rate Comparisons for Convenience Goods

	2008				2013			
	Expenditures	70% Retention	80% Retention	90% Retention	Expenditures	70% Retention	80% Retention	90% Retention
Total Goods and Personal Services	\$203,329,259				\$246,477,324			
Total Convenience Goods	\$106,582,849	\$74,607,994	\$85,266,279	\$95,924,564	\$129,200,566	\$90,440,396	\$103,360,453	\$116,280,509
Food Away from Home	\$40,620,849	\$28,434,594	\$32,496,679	\$36,558,764	\$49,240,911	\$34,468,638	\$39,392,729	\$44,316,820
Food at Home	\$24,869,689	\$17,408,782	\$19,895,751	\$22,382,720	\$30,147,232	\$21,103,062	\$24,117,785	\$27,132,509
Drug	\$10,661,499	\$7,463,050	\$8,529,200	\$9,595,349	\$12,923,953	\$9,046,767	\$10,339,163	\$11,631,558
Personal Care Products and Services	\$5,411,113	\$3,787,779	\$4,328,890	\$4,870,001	\$6,559,393	\$4,591,575	\$5,247,515	\$5,903,454
Auto-Related	\$25,019,700	\$17,513,790	\$20,015,760	\$22,517,730	\$30,329,076	\$21,230,353	\$24,263,261	\$27,296,169

Source: BLS CES (2007); ESRI Business Analyst Online (2009), access provided by GCR and Associates

* Total Consumer Spending: 42.59% of Income

Table 4.3: Retention Rate Comparisons for Comparison Goods

	2008				2013			
	Expenditures	10% Retention	20% Retention	30% Retention	Expenditures	10% Retention	20% Retention	30% Retention
Total Goods and Personal Services	\$203,329,259				\$246,477,324			
Total Comparison Goods	\$96,746,410	\$9,674,641	\$19,349,282	\$29,023,923	\$117,276,758	\$11,727,676	\$23,455,352	\$35,183,027
Apparel and Services	\$16,254,768	\$1,625,477	\$3,250,954	\$4,876,431	\$19,704,158	\$1,970,416	\$3,940,832	\$5,911,247
Household Furnishings and Equipment	\$20,294,352	\$2,029,435	\$4,058,870	\$6,088,305	\$24,600,972	\$2,460,097	\$4,920,194	\$7,380,292
Entertainment	\$14,143,899	\$1,414,390	\$2,828,780	\$4,243,170	\$17,145,345	\$1,714,535	\$3,429,069	\$5,143,604
Other	\$46,053,391	\$4,605,339	\$9,210,678	\$13,816,017	\$55,826,283	\$5,582,628	\$11,165,257	\$16,747,885

Source: BLS CES (2007); ESRI Business Analyst Online (2009), access provided by GCR and Associates

* Total Consumer Spending: 42.59% of Income

EXPENDITURES OF STUDENTS AND EMPLOYEES

As discussed earlier in the report, one challenge the project area faces when attempting to attract better retail is its behavioral boundaries (Lake Ponchartrain, Bayou St. John, the Industrial Canal, and I-10/I-610). Behavioral boundaries are those that guide behavior because of some limiting or facilitating factor. In the case of the project area, the boundaries have limited crossings and make the retail areas harder to access for people outside the area, reducing the likelihood that people will frequent the area for convenience goods.

The area nonetheless has a significant number of people working or attending university in its boundaries and this inflow of people helps support the area's retail establishments. Table 4.4 shows the numbers of students who attend one of the universities in Gentilly and the number of employees who work in this area.

To understand patterns of employee and student spending, a survey of students and employees would be needed as well as

an analysis of business receipts. This was beyond the scope of this project. However, assuming that students and employees eat in restaurants during the day, the project area captures a portion of their food expenditures. They also might purchase convenience goods from Walgreens or Dollar General.

To get ballpark of possible additional expenditures, if 50% of the students spend \$100 per month for the academic year (9 months), that would be an additional \$7,774,200 spent in the project area. Assuming that much of this would be spent food and beverages in restaurants or coffeehouses, gas, and convenience goods. If half the employees had lunch in Gentilly twice weekly (assuming \$10 per lunch) for each of the 52 weeks, this is an additional \$2,904,720. If half the employees spend \$20 on gas in the project area four times a year, this would result in an additional \$223,440 in gas sales.

Table 4.4: Students and Employees in the Project Area

	Semester	Number
Students Total		17,276
University of New Orleans	Fall 2008	11,428
Dillard University	Fall 2008	851
Southern University at New Orleans	Fall 2008	2,961
Theological Baptist SEM	Fall 2007	2,036
Employees Total		5,586

Source: Employment data from ESRI Business Analyst Online (2009), access provided by GCR and Associates; university figures obtained from universities by UNO

ESTIMATED SUPPORTABLE SPACE

Two measures can help determine how much retail space people in the project area could support. The first is an estimate of supportable square footage. This calculation translates potential expenditures and retention rates into square feet of retail space that those expenditures might support.

The second is assessment of expenditure leakage. This calculation compares expenditures with local sales, and helps show how well served the area is in a particular good or service. When combined with information about the location preferences of desirable businesses and the type of retail space available, potential strategies to attract more businesses can be developed.

SUPPORTABLE SQUARE FOOTAGE

Based on estimated retention rates and consumer expenditures, it becomes possible to roughly estimate the amount of retail space that a given population can support. To get this estimate, we have divided the consumer expenditure potential (CEP) of the area by sales per square foot figures drawn from ULI/ICSC *Dollars and Centers of Shopping Centers* (2006). The calculation is shown below:

- A) Population × Per Capita Income = Total Area Income
- B) Total Income × % Spent on Retail = Total Retail Expenditures
- C) Total Retail Expenditures × Retention Rate = CEP

Applied to the project area, this means:

- A) $26,337 \times \$18,127 = \$477,410,799$
- B) $\$477,410,799 \times 42.29\% = \$203,329,259$
- C) $\$203,329,259 \times 50\% = \$101,664,630$

By this calculation, if the project area retained half of its consumer spending, this would come to over \$100 million. To determine the supportable square footage, the consumer expenditure potential (\$101,664,630 in the previous example) is broken down into its product categories. Using the national or regional data on sales per square foot by each category compiled by the ICSC and ULI, the CEP is divided by sales per square foot averages to produce a “supportable square footage” figure. For example, if residents spent 15% of their clothing budget in Gentilly, the CEP for the area is \$2,438,125. When this is divided by a sales per square foot figure (approximately \$216), it results in nearly 11,300 supportable square feet of space. This is only a couple of small stores.

The sales per square foot figures come from *Dollars and Cents*. Although *Dollars and Cents* is the most comprehensive resource available for assessing retail sales per square foot, it has some limitations worth mentioning. *Dollars and Cents of Shopping Centers* collects data via voluntary surveys distributed to businesses that are mostly large, corporate entities. The businesses are typically located in suburban settings and often the response rates are low.

Although independent businesses respond to the survey, they are usually located in shopping centers with national chains. The ULI's shopping center typologies focus on retail areas which could be said to be “shopping centers,” indicating single or cooperative management and ownership. The sales per square foot figures may not be as useful urban independent or free-standing businesses. Independent establishments have varying profit margins. Certain small stores are started by individuals with a passion for the business and make minimal profit (such as a small antique shop). Others are small and employ few employees to reduce overhead costs. Small and independent businesses can be both the most volatile and the most enduring in the retail industry.

SUPPORTABLE SQUARE FOOTAGE ESTIMATES IN GENTILLY

Table 4.5 shows supportable square footage by area residents. It is divided by retail category, and the figures are based on the consumer expenditure potential with variable retention rates. For example, spending on clothes is low because there are few options, furniture and home furnishings are higher because of the Home Depot, TrueValue Hardware, among others. There are few choices for entertainment related purchases, but there are auto-related services in the area. There are grocery and drug stores, but restaurants are somewhat limited. Many other convenience services such as beauty shops and laundry mats are available.

Using the scenario described previously, the table also shows additional square footage supported by students and employees. This assumes that half the students spend \$100 per month for 9 months a year (\$90 food away from home, \$5 drug, \$5 gas), and half the employees spend \$20 a week on food away from home and \$80 annually on gas in the project area.

Table 4.5: Supportable Square Foot of Retail Space

RESIDENTS	Expenditures	Sales per Square Foot	Estimated Current Retention Rate	Supportable Square Footage
COMPARISON GOODS	\$96,746,410		16-17%	77,162
Apparel and Services	\$16,254,768	\$216	15%	11,267
Furniture and Home Equipment	\$20,294,352	\$218	35%	32,649
Entertainment	\$14,143,899	\$195	10%	7,258
Auto-related	\$46,053,391	\$886	50%	25,988
CONVENIENCE GOODS	\$106,582,849		78-79%	242,132
Food at Home (Including liquor)	\$40,620,849	\$271	80%	120,091
Food Away from Home	\$24,869,689	\$260	50%	47,876
Drug	\$10,661,499	\$513	80%	16,624
Personal Care Products & Services (beauty, other health, dry cleaners, laundry, optical goods-average)	\$5,411,113	\$204	70%	18,545
Auto (gas, wash, other)	\$25,019,700	\$481	75%	38,996
STUDENTS AND EMPLOYEES				
CONVENIENCE GOODS				40,152
Food Away from Home	\$9,901,500	\$260		38,122
Drug	\$388,710	\$513		758
Auto (gas, wash, other)	\$612,150	\$481		1,272
TOTAL				359,446

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates; BLS Consumer Expenditure Survey; Dollars and Cents of Shopping Centers (2006)

OCCUPIED AND VACANT SQUARE FOOTAGE ESTIMATES

Tables 4.6 and 4.7 show occupied and unoccupied retail space. The area still faces significant vacancy, including vacant lots where buildings have been demolished. Although large sites such as Gentilly Woods Shopping Center receive the most attention, vacancies throughout the region offer both opportunities for developers and businesses but also potential problems for neighborhood residents until the sites are redeveloped or occupied.

Table 4.6: Occupied and Unoccupied Square Footage by Commercial Area

Area/Corridor	Occupied Retail		Unoccupied Retail	
	(Square Feet)	Percent	(Square Feet)	Percent
Gentilly Woods	219,349	46.2%	255,936	53.8%
Gentilly and Elysian Fields	177,876	59.5%	120,863	40.5%
Lake Terrace Shopping Center	0	0.0%	30,200	100.0%
St. Bernard/Paris Avenue Corridor*	65,978	47.5%	72,798	52.5%
St. Anthony (at Mirabeau)	7,872	100.0%	0	0.0%
Elysian Fields (Stephen Girard to Leon C. Simon)	40,349	61.4%	25,362	38.6%
St. Roch (at Prentiss)	2,670	14.9%	15,235	85.1%
Clematis Corridor	9,088	58.5%	6,459	41.5%
Franklin Corridor	100,138	79.6%	25,632	20.4%
TOTAL	623,320	53.0%	552,485	47.0%

*Excluding Lake Terrace

Source for both tables: UNO Survey, Jan and Feb 2009; approximate measurements off Google Earth [accessed February 2009]

Table 4.7: Occupied and Unoccupied Square Footage by Type of Good

	SQUARE FOOTAGE	
	Occupied	Unoccupied
COMPARISON GOODS	216,054	13,470
Apparel and Services	69,577	1,886
Furniture and Home Equipment	49,740	4,708
Entertainment	9,040	251
Auto-related	87,697	6,625
CONVENIENCE GOODS	407,266	57,193
Food at Home (including liquor)	158,983	11,714
Food away from Home	94,203	33,318
Drug	39,800	
Personal Care Products and Services (Beauty, Other health, dry cleaners, laundry)	77,222	12,161
Auto (Gas, Wash & Other)	37,058	
GENERAL VACANT		468,890
Vacant Space		287,670
Vacant Strip Mall		181,220
OTHER	442,091	147,183
Banks and Professional Services	120,091	88,567
Hotels and Motels	50,100	58,616
Storage and Warehouse	271,900	
TOTAL	623,320	539,552

EXPENDITURE LEAKAGE

Expenditure leakage is another measure that provides insight into which retail goods and services are well provided within an established trade area. In this report, the trade area is the project area. Before this measure is calculated, a tally of sales by consumers to businesses within the trade area is determined. Examining current level of sales allows one to attach a figure to the current retail “supply.” Next, using consumer expenditure data, an estimate is made of expected consumer purchases across several North American Industrial Classification System (NAICS) categories. This is the current retail “demand”—the amount consumers would theoretically spend within the trade area if it could meet all of their expected consumer desires (“retail gap”). The gap between the demand and supply shows unmet demand in the trade area.

The number produced by this equation is (usually) a large dollar figure in the millions. To create an index to compare across categories, the sum of total retail supply expenditures and total retail demand expenditures is divided by the retail gap. This gives a range of values between -100 and +100. Because this is a measure of leakage out of the area, a positive value indicates dollars leaving the area. A negative figure indicates a surplus and it could mean that an inflow of consumers also support these businesses. It could also explain lackluster sales and might indicate a good or service is oversupplied. Positive values indicate that people are buying these products outside the project area. A “100” (a total leakage) means that no establishments in the project area capture that demand. Lower positive values suggest that the establishments do not meet the demand and people travel outside the trade area to purchase goods or services.

Two notes are in order here. First, the ESRI data (2008) predates the surveys conducted by the University of New Orleans in

January 2009. Businesses continue to open. Second, retail leakage/surplus is a relative figure but does not account for volume of sales per NAICS industry. For example, though the retail leakage might be heavy for typewriter repair shops, expected overall consumer expenditures are extremely low for such a category.

FOOD AND DRINK

The area is well served by grocery stores. Based on an assumed 80% retention rate, Gentilly residents would spend close to \$20 million on groceries in Gentilly annually. Assuming sales per square foot in range of \$270 per square foot, this would support around 74,000 square feet. The current square footage for grocery stores (the Rouses at Franklin and Leon C. Simon and the Winn-Dixie along Chef Menteur) is approximately 130,000 square feet.

There is a collective surplus in the NAICS Food and Drink category of \$518,753. It is likely that these store also draw from the area south of the freeway because the area between I-10 and the river are underserved by grocery stores and although New Orleans East has a Winn-Dixie on Chef Menteur, the Winn Dixie off I-10 might be more convenient for some people living in eastern New Orleans neighborhoods. The traffic counts. Residents in the east part of the project area (along the lake, around Paris Avenue, for example) might find the Robert’s on Robert E. Lee in Lakeview convenient.

The breakdown is worth examining. Grocery stores generate a surplus of \$3.4 million and a surplus factor of -4.9. Specialty food stores and liquor stores are expenditure leaks within the project area, amounting to \$2.9 million in untapped potential expenditures. There are no liquor stores in the project area.

The Food Service and Drinking Places category reports the third largest leakage of any category, which, at \$12.2 million, is narrowly behind department stores for leaked expenditures. Leakage factors by sub-category indicate that Gentilly residents demand more of all types of restaurants and drinking establishments. Full-service restaurants report +12.4 leakage; limited-service restaurants (such as fast food) +10.2; special food services +100.0 (a nearly \$7 million gap); and drinking places a factor of +36.8. Given the size of the city and variety of restaurants available, and the concentration of restaurants and bars in nearby districts like the Bywater, Marigny, Tremé and French Quarter, it is likely that Gentilly will continue to leak expenditures. However, it is possible that the district could support more eateries and drinking places as well as specialty food and liquor stores.

HOUSEHOLD GOODS AND SERVICES

For most comparison goods, there is leakage because the area is not well served by quality stores. In the Furniture and Home Furnishings category, furniture expenditures are totally spent elsewhere (+100.0), although home furnishings fare better (+34.8). Most of Gentilly's offerings in this category consist of small frame shops and hardware stores. Total retail gap here is \$5.5 million. In the Electronics and Appliances category, the project area has a slight retail leakage in this category (+9.1). The total retail gap is \$842,307. There are no “big box” or “category killer” stores that would generate a larger volume of sales. In the General Merchandise category—general merchandise is the second largest category by potential expenditures—and for

Gentilly, there is strong leakage, at \$12.6 million and a factor of +43.8. This category includes department stores, of which Gentilly has none.

Table 4.8: Open Restaurants (square footage)

Area/Corridor	Occupied Space (Sq Ft)	Gross Leasable Area (GLA=50%) (Sq Ft)
Gentilly Woods	7,850	3,925
Gentilly and Elysian Fields	15,500	7,750
Lake Terrace Shopping Center	0	0
St. Bernard/Paris Avenue Corridor*	6,900	3,450
St. Anthony (at Mirabeau)	1,700	850
Elysian Fields (Stephen Girard to Leon C. Simon)	12,500	6,250
St. Roch (at Prentiss)	0	0
Clematis Corridor	2,200	1,100
Franklin Corridor	11,300	5,650
TOTAL PROJECT AREA	56,250	28,125

Source: UNO Survey, Jan and Feb 2009; approximate measurements off Google Earth [accessed Feb 2009]

BUILDING MATERIALS

As a group, Building Materials, Garden Equipment, and Supply Stores, constitutes a collective surplus of \$2.4 million in spending and -16.3 in surplus factor. The Lawn and Garden supply portion of this category is leaking.

PERSONAL GOODS AND SERVICES

The Health and Personal Care category represents Gentilly's largest retail surplus. Beauty stores and nail shops are indeed prevalent upon any survey of Gentilly's retail stock. There is a surplus of \$6.1 million and a retail surplus factor of -29.8.

In the Clothing and Clothing Accessories category, Gentilly reports heavy retail leakage—\$6.9 million and a +53.4 retail leakage factor. This is expected because clothing shops are typically associated with other clothing stores to give a variety of choices. Small-scale clothing retail tends to diverge in two very different directions: the upscale boutique or the discount clothing store (“urban wear” shops or Family Dollar). The project area has a few clothing stores including the Soul Train Suit Warehouse.

The project area reports leakage across the Sporting Goods, Hobby, Book, and Music Stores sub-categories of this NAICS classification. There is uncaptured demand of \$1.3 million dollars and a leakage factor of +53.3. This category, like clothing, clusters in shopping centers or along major commercial arteries. “Category killers” have dominated the market and they driving smaller scale competitors out of business through economies of scale. Giants such as Best Buy and, formerly, Circuit City have resulted in few smaller shops. Small scale retail in this category, again, tends to be of the specialty and boutique variety, catering to a specific niche not represented in the large chains. On the whole, these are not present in the project.

Miscellaneous Retailers including florists, office supplies, stationery, and gift shops have a large retail gap, \$4.2 million, and a leakage factor of +84.6.

AUTOMOTIVE SERVICES

With a combined retail gap of nearly \$34.8 million, the Automotive categories reflect considerable leakage. There are no car dealers (leakage factor +100). Although motor vehicles are one of the largest consumer purchases to be made, and the data suggest that spending power of Gentilly residents could potentially net \$31 million dollars annually, it is unlikely that the area will attract dealerships and therefore this is not an area necessarily worth pursuing. Gasoline Stations represent Gentilly's second largest retail surplus, with a surplus factor of -15.5 and it represents a significant expenditures of \$7.6 million. Gas stations tend to capture a mix of both resident expenditures and others (employees, students, visitors) that travel within the project area. The surplus is also notable however because several gas stations never reopened after Hurricane Katrina including two along Elysian Fields Avenue where many students and people who work in New Orleans drive.

A UNIVERSITY DISTRICT: THE POTENTIAL FOR BETTER RESTAURANTS AND SMALL SHOPS

There is not adequate demand to currently support all the retail space along Elysian Fields. If the area was developed with a mix of housing and more rentals for students, a student population could support businesses that other community members would also use. University districts support inexpensive eateries, especially sit down restaurants where people linger, as well as coffeehouses, bookstores, and small shops.

Table 4.9: Square Footage along Elysian Fields including the Gentilly & Elysian Fields Shopping District

Category of Good or Service	TOTAL	
	Occupied	Unoccupied
COMPARISON GOODS TOTAL	99,584	4,330
Apparel and Services	27,224	
Furniture and Home Equipment	34,970	4,330
Entertainment	5,530	
Auto-related	31,860	
CONVENIENCE GOODS TOTAL	118,641	23,492
Food at Home (including liquor)	14,100	
Food Away From Home	31,858	16,242
Drug	24,400	
Personal Care Products and Services (Beauty, Other health, dry cleaners, laundry)	42,755	7,250
Auto (Gas, Wash & Other)	5,528	
OTHER		
Vacant Space		118,673
Banks and Professional Services	81,093	4,004
TOTAL	299,318	150,499

Source: UNO Survey, Jan and Feb 2009; approximate measurements off Google Earth [accessed Feb 2009]

Student communities can be difficult neighbors but with collaboration between the universities and neighborhood residents, but some good be mitigated by good planning along the corridor. The tables below show commercial space and what additional square footage students might support, assuming a per capita income of \$12,000 and an off campus student population 8600 (half the current student figure).

Table 4.10: Additional Supportable Square Footage By Potential Student Population (assuming 8,600 student with an annual per capita income of \$12,000)

	Expenditures	Sales per Square Foot	Estimated Retention Rate	Supportable Square Footage
COMPARISON GOODS	\$25,400,569			14,392
Apparel and Services	\$3,628,143	\$216	20%	3,353
Furniture and Home Equipment	\$4,831,572	\$218	20%	4,442
Entertainment	\$3,463,876	\$195	20%	3,555
Auto-related	\$13,476,978	\$886	20%	3,042
CONVENIENCE GOODS	\$25,796,951			66,017
Food at Home (Including liquor)	\$10,373,774	\$271	80%	30,669
Food Away from Home	\$5,081,542	\$260	80%	15,652
Drug	\$3,038,927	\$513	80%	4,738
Personal Care Products & Services (beauty, other health, dry cleaners, laundry, optical goods-average)	\$1,249,852	\$204	80%	4,895
Auto (gas, wash, other)	\$6,052,856	\$481	80%	10,063
TOTAL				80,409

Source: BLS Consumer Expenditure Survey; Dollars and Cents of Shopping Centers (2006)

CASE STUDY: Virginia Commonwealth University

Location: Richmond, VA

“Despite their considerable size, colleges and universities are often an overlooked component of urban economies. Their impact on these economies can be enormous. More than half of all colleges and universities in the nation are located in the urban core: central cities and their immediate surroundings. They have significant purchasing power, attract substantial revenues for their surrounding economies, invest heavily in local real estate and infrastructure, are major employers, and help to train the workforce and nurture new businesses.” (Initiative for Competitive Inner City and CEOs for Cities Leveraging Colleges and Universities for Urban Economic Revitalization [2003]).

An Opportunity for Gently?

Student communities can be difficult neighbors but with collaboration between the universities and neighborhood residents, the Elysian Fields Boulevard could become a central neighborhood for the four universities and attract businesses to serve the entire community.

Virginia Commonwealth University in Richmond Virginia has helped invest over \$2 billion in the Richmond downtown area over 15 years. The commitment by a progressive university president and the technical assistance of their MURP program allowed for a complete transformation of a once decaying downtown area. Recently, the MURP program finished a plan for the revitalization of Hull Street Road which will help create a gateway into the VCU campus and the City of Richmond.

VCU has not only provided the technical assistance to help neighborhoods develop revitalization plans, it also provides volunteer resources. Neighborhood cleanups or reconstruction projects of historic homes are often requirements of students at VCU. VCU, through capital investments of its own, reorganized its campus master plan to include the redaptive reuse of existing building near its campus. With 70% of its population being commuters, VCU realized that by building campus services along

existing streets such as libraries, the book store and student housing, that they were creating revitalization of decaying area of Richmond by expanding into the town rather within well defined boundaries that excluded the area around the Universities. Similar to Yale University’s campus, VCU has businesses located around the campus on city streets that are supported entirely by VCU students, but the vibrancy of the coffee shops and clothing stores the students are at has drawn in people from outside the VCU neighborhood.



THREE SNAPSHOPS

In the following section, we will discuss three commercial nodes within Gentilly by drivetime increment of 2, 4, and 6 minutes. Several factors influence retail locations, including, perhaps most importantly for larger retailers, heavy daily traffic. Even if a high profile yet underutilized intersection of Gentilly might seem an excellent candidate for a particular “big box”, there are more central locations that Gentilly residents and others will frequent. In areas where consumers tend to drive rather than walk to retail, this measure can be useful and more accurate than concentric mile rings for detailing demographics within a certain travel distance.

GENTILLY WOODS COMMERCIAL CORRIDOR

The Gentilly Woods area has 88,382 square feet of occupied comparison shopping space, and 130,967 square feet of occupied convenience shopping, with approximate sales of \$18,139,679 and \$45,284,460 needed to support these businesses respectively (table 4.11). The population within a two-minute drive time of this area is only 527 people and would not be adequate to support the businesses. Within a 4 minute drive time, there are adequate consumers but additional competing shopping areas as well. To be viable, this corridor must attract shoppers to the area.

The traffic counts at France and Chef Menteur reach 19,901 cars daily and undoubtedly these travelers support the businesses in this area.



Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

Table 4.11: Demand and Square Footage in Gentilly Woods Commercial Corridor

	Population	Per Capita Income	Potential Retail Expenditures	Supportable Square Footage*
2008				
2 Minute Drive Time	527	\$15,672	\$3,940,438	6,166
4 Minute Drive Time	10,043	\$15,767	\$75,547,822	117,539
6 Minute Drive Time	52,458	\$13,947	\$349,061,496	543,077
2013				
2 Minute Drive Time	745	\$18,015	\$5,716,078	9,099
4 Minute Drive Time	11,513	\$17,183	\$94,383,681	146,844
6 Minute Drive Time	59,140	\$15,293	\$431,502,608	671,341
				Occupied Unoccupied
2008 Gentilly Woods Retail Sq. Footage				219,349 255,936

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates; BLS Consumer Expenditure Survey; Dollars and Cents of Shopping Centers (2006)

*Assumes Avg. Retention Rates of 17% for Comparison Goods and 79% for Convenience Goods

GENTILLY AND ELYSIAN FIELDS

The Gentilly Boulevard and Elysian Fields Avenue area has 97,784 square feet of occupied comparison shopping space, and 80,092 square feet of occupied convenience shopping, with required sales of \$20,069,362 and \$27,693,411 respectively (table 4.12). Within a two-minute drive time there are 6,736 people.

In addition to Gentilly residents, this intersection is a key shopping district that serves the Dillard community and the people who travel to the UNO Tech Center and UNO’s lakefront campus. It was designated as an ORDA Target area, and with minimal investment in landscaping and façade improvements, it could be turned into a pleasing network of shopping streets.



Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

Table 4.12: Demand and Square Footage at Gentilly Boulevard and Elysian Fields

	Population	Per Capita Income	Potential Retail Expenditures	Supportable Square Footage *
2008				
2 Minute Drive Time	6,736	\$17,480	\$50,147,715	79,823
4 Minute Drive Time	33,079	\$14,476	\$228,460,100	117,539
6 Minute Drive Time	85,954	\$15,865	\$650,602,286	1,012,221
2013				
2 Minute Drive Time	6583	\$19,303	\$54,119,815	86,145
4 Minute Drive Time	35,289	\$15,880	\$267,361,745	415,967
6 Minute Drive Time	90,758	\$17,203	\$744,900,941	1,158,932
2008 square footage				Occupied 177,876 Unoccupied 120,863

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates; BLS Consumer Expenditure; Dollars and Cents of Shopping Centers (2006)

*Assumes Avg. Retention Rates of 17% for Comparison Goods and 79% for Convenience Goods

PARIS AND ROBERT E. LEE

The Lake Terrace area has 15,235 square feet of vacant space. Within a two minute drive time of the area, there are 2,861 people with an average per capita income \$25,396, which is the highest in the project area (table 4.13).

Because grocery stores are located in close proximity in both directions along Robert E. Lee and a new Dollar General south on Paris, this site has competition for convenience goods. The project area nonetheless leaks expenditures on specialty food and restaurants. The immediate vicinity is also not well served by other convenience services including professional services such as veterinarian (as was previously located here).



Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

Table 4.13: Potential Demand and Square Footage at Paris and Robert E. Lee

	Population	Per Capita Income	Potential Retail Expenditures	Supportable Square Footage
2008				
2 Minute Drive Time	2,861	\$25,396	\$30,443,684	45,198
4 Minute Drive Time	14,028	\$14,208	\$83,510,816	206,082
6 Minute Drive Time	38,387	\$20,379	\$333,176,746	530,335
2013				
2 Minute Drive Time	3312	\$27,246	\$25,754,140	37,242
4 Minute Drive Time	24,289	\$24,289	\$247,191,363	245,330
6 Minute Drive Time	41,743	\$22,036	\$385,416,625	572,205
				Unoccupied
Square Footage in Lake Terrace Center (current)				30,200

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates; BLS Consumer Expenditure; Dollars and Cents of Shopping Centers (2006)
 *Assumes Avg. Retention Rates of 17% for Comparison Goods and 79% for Convenience Goods

QUALITATIVE FACTORS

Many qualitative and quantitative factors determine where retailers locate. In addition to potential consumer expenditures, density and competing trade areas, retailers also look at the characteristics of the local population and other retailers that are in a given shopping center.

Because different groups of consumers have different patterns of spending, ESRI has produced a classification system for consumers in every place in the United States. These consumers are divided up into “tapestries”—segments of the population with similar consumer patterns and demographic profiles. The top five tapestries in Gentilly in 2008 are listed on the following page with explanations provided by ESRI. There are 65 segments, each a member of a different life stage, life mode, urbanization scenario, and income level. Generally speaking, the lower on the list (the higher the number), the lower the income.

Another issue is retail co-location. Many retailers depend on the presence of a certain “retail mix” to draw a critical mass of customers. For example, certain chain stores depend on the presence of a grocery store within the shopping center. These “demand drivers” almost guarantee a certain level of profits, as a predictable flow of consumers shop at this cluster of needed retail and services. For the project area, there are few centers with a mass of these clustered businesses. In terms of the number of retail areas within Gentilly, small scale (pedestrian) areas are most common.

Specific retailers also look for specific qualities in terms of density, size and frontage of retailer space, other tenants and who comprises the potential trade area. Table 4.14 (after the tapestry segments) show some chain retailers and the characteristics they look for when choosing a community to locate in.

In the 2006 charrette led by Andres Duany, a consultant (Gibbs Planning Group) identified store types that might be supportable in Gentilly. These included Radio Shack, Best Buy, Kohls or Sears, Ross Dress for Less, Payless Shoes, and Old Navy. They also mentioned Dollar Stores and other discount retailers that are well represented in New Orleans since hurricanes Katrina and Rita.

MOST COMMON TAPESTRY SEGMENTS

Family Foundations (#34) – 33.1% of the population

Life Mode: L10 – Traditional Living: Middle-aged, middle income, Middle America.

Urbanization Summary: U4 – Metro Cities II: densely populated transition neighborhoods in larger cities

Household Type: Mix of families

Median Age: 39.0

Income: Middle

Employment: Professional/Management/Service

Education: No High School Diploma/High School Grad/Some College

Residential: Single Family

Race/Ethnicity: Black

Metro City Edge (#51) – 12.7% of the population

Life Mode: L3 – Metropolis: City dwellers in older homes reflecting the diversity of urban culture.

Urbanization Summary: U6 – Urban Outskirts II: Older homes, younger populations in suburban proximity to city life.

Household Type: Mix of families

Median Age: 29.4

Income: Lower Middle

Employment: Service/Skilled/Professional/Management

Education: No High School Diploma/High School Grad

Residential: Single Family; Duplex

Race/Ethnicity: Black; White; American Indian

Great Expectations (#48) – 10.7% of the population

Life Mode: L7 – High Hopes: Young households striving for the “American Dream”

Urbanization Summary: U5 – Urban Outskirts I: Close to urban amenities with suburban affordability.

Household Type: Mix of families

Median Age: 33.2

Income: Lower Middle

Employment: Professional/Management/Skilled/Service

Education: High School Grad/Some College

Residential: Single Family; Multi-units

Race/Ethnicity: White

Prosperous Empty Nesters (#14) – 6.9% of the population

Life Mode: L5 – Senior Styles: Senior lifestyles by income, age, and housing type.

Urbanization Summary: U7 – Suburban Periphery I: Married couple families in lower-density suburban expansion.

Household Type: Married couple, no kids

Median Age: 48.7

Income: Upper Middle

Employment: Professional/Management

Education: Some College/Bachelor's or Graduate Degree

Residential: Single Family

Race/Ethnicity: White

Main Street, USA (#24) – 6.8% of the population

Life Mode: L10 – Traditional Living: Middle-aged, middle income, Middle America.

Urbanization Summary: U5 – Urban Outskirts I: Close to urban amenities with suburban affordability.

Household Type: Mix of families

Median Age: 36.8

Income: Middle

Employment: Professional/Management/Skilled/Service

Education: Some College

Residential: Single Family; Multi-units

Race/Ethnicity: White

Source: ESRI Business Analyst Online (2009), access provided by GCR and Associates

PREFERRED RETAILER CHARACTERISTICS

Table 4.14: Characteristics that Specific Retailers Require

Retailer	Preferred Size and Frontage (Sq Ft unless specified)	Preferred Co-Tenants	Preferred Population Density	Preferred Average Income
Academy Sports	75,000		not provided	not provided
Anna's Linens	7,000-10,000	prefer in-line in all 4 types of centers	not provided	not provided
Barnes & Noble Booksellers	25-27,000		not provided	not provided
Bowlmore Lanes	35,000	Movie Theatres, Restaurants	150,000	\$75,000+
Burlington Coat Factory	60-80,000		Good Visibility	\$40,000
Chick-Fil-A	1.2 acres		Target, Wal-Mart	\$50,000+
Cici's Pizza	4,000		Grocery Anchored	\$32,000-\$65,000
Dollar Tree Stores	10,000		not provided	\$20,000-\$60,000
Famous Footwear	6,000		TJ Maxx, Marshalls	\$55,000
Gamestop	1,800-2,000		Wal-Mart, Target, Best Buy	All
Golden Coral	11,000		Home Depot, Target, Wal-Mart	\$50,000-\$70,000
Hobby Lobby	55,000		not provided	not provided
Panera Bread	3,800	National Big Box, Grocery, Fashion related	not provided	not provided
Party City	15,000		Target, Kohl's, JC Penneys	\$50,000
Quiznos	1,500		not provided	\$60,000
T-Mobile	1,200-2,500		10,000 Employees in 2 miles	
		Large Grocery, Target, Wal-Mart	100,000	\$45,000
Workout Anytime	5,000		not provided	\$60,000+

Source: International Council of Shopping Centers

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CHAPTER V – CREATING A VIBRANT RETAIL ENVIRONMENT

CREATING A COMPETITIVE RETAIL ENVIRONMENT

(RE) DESIGNING PLACES

As discussed in Retail Trends (Chapter IV), redesigning shopping centers is integral to making them appear new and exciting. Sometimes the best marketing can be a figurative new coat of paint. As the usual suburban, auto-centric shopping centers become outdated, business owners and neighborhood residents need to consider new forms of neighborhood business revitalization schemes such as “Main Street” streetscapes and “place making.” In the Urban Institute's Ten Principles for Rebuilding Neighborhood Retail (2003), some of the suggestions include:

- pedestrian friendly shopping coupled with on-street and off-street parking.
- longer business days with a connection to the culture through festivals and markets.
- design standards that incorporate setbacks, signage and façade improvements.
- anchoring the shopping center every few blocks coupled with a diverse, flexible retail mix in between.

These shopping districts should reflect the neighborhoods they serve in both design and retail mix. In other words, business owners should consider the price range, products, convenience, store layout, parking types, store design and merchandising that will reflect and attract area residents. Design problems include blank walls facing the street, parking lots that disrupt retail continuity, and poor architectural quality of new buildings.

Perhaps the most direct strategy of reinvestment and reinvention of retail is to beautify and modernize the face it presents to the public through *façade improvements*. These improvements can be costly, though. Please consult the Financing Tools in Chapter Six to learn more about financing strategies for façade improvements. A case study is provided next page.

CASE STUDY: FAÇADE IMPROVEMENT IN DETROIT

BACKGROUND

In cities where residents are determined to renew and redevelop the existing built environment, innovative means of renewal are underway. Detroit, a city that leads in terms of depopulation and retail loss, is actively working to reinvent small scale retail corridors by giving them a new 'face'. Detroit's Office of Neighborhood Commercial Revitalization (ONCR) has developed a program to revitalize its commercial corridors. The ONCR works with neighborhood groups, community organizers, private investors, philanthropists and other city agencies to support and encourage commercial and retail investments throughout the City.

One successful effort of the ONCR has been its façade improvement program, known as *ReFresh Detroit!* This initiative provides retail property owners the opportunity to receive matching grants for the improvement of storefront retail façades.

RESULTS

Since 2002, the program has helped transform the façades of more than 230 small businesses. ONCR's efforts have revitalized many districts and attracted 211 new businesses, creating 700 new jobs. Combined with other ONCR initiatives (for example, a microloan program that expands capital to non-traditional entrepreneurs and existing businesses) Detroit is on track to be one of the most small business friendly cities in the country.

APPLICATION

Pedestrian shopping within the project area would most benefit from façade improvements. Since passers-by are closer to the building, they are more likely to notice and appreciate these physical improvements. The intersection at Gentilly Boulevard and Elysian Fields has great potential. It has repeatedly been identified as a possible town center and with façade improvements and landscaping could easily realize its full potential.

Several of the project area's corridors have neutral grounds, which slows traffic, assist pedestrian street crossings, and are ripe for the placement of public art or walking trails. St. Anthony Avenue already has a walking trail that extends from Robert E. Lee Boulevard on the north to Mirabeau on the south. Business organizations throughout New Orleans have enlisted universities to assist in designing and installing public art, street furniture and other projects to provide visual definition to their district and to draw residents out to shop.

MARKETING PLACE

Developing a sense of place is key to attracting both local and non-local consumers into the project area. Currently, the project area may be better known as a bedroom community than a regional shopping destination. By stressing that the project area is a unique, it may be possible to attract new customers to area restaurants and shops and improve neighborhood quality at the same time.

Business districts must capitalize on the assets that make them unique. Every district has unique qualities like distinctive buildings and human scale that give people a sense of belonging. These local assets must serve as the foundation for all aspects of the revitalization program.

-National Trust, Main Street Program

The National Trust for Historic Preservation's Main Street Program offers tips on how business districts can compete with larger, suburban shopping centers. While most of their tips specifically refer to "Main Streets" that have been designated as historic (that is, listed on the National Register of Historic Places), the "Main Street Four Point Approach" is applicable to any place that faces the problems of heavy retail competition and leakage, underutilized land, and no recognizable retail identity.

MAIN STREET FOUR POINT APPROACH

1) *Organization*: typically a board is formed and volunteers work to implement the revitalization scheme. Designated Main Streets receive money to start this process, but business owners could easily organize within a node or small corridor in order to collectively work towards the other three goals. The concept of a Business Improvement District is discussed in Chapter Six.

2) *Promotion*: By marketing the unique characteristics of these shopping areas to residents, investors, business owners, and visitors, an effective promotional strategy forges a positive image for the area. Promotional schemes include: special events, farmers markets, festivals, targeted marketing campaigns, block sales/parties, tax free shopping days, among many other ideas. These activities can improve investor confidence, business revenues and consumer turnout.

3) *Design*: Capitalizing on the area's character and unique shopping experience helps draw residents to an area. The National Trust suggests, "An inviting atmosphere, created through attractive window displays, parking areas, building improvements, street furniture, signs, sidewalks, street lights, and landscaping, conveys a positive visual message about the commercial district and what it has to offer" (<http://www.mainstreet.org/content>). This element of the Main Street Four Principles has been discussed above in the "(Re)designing Place" section.

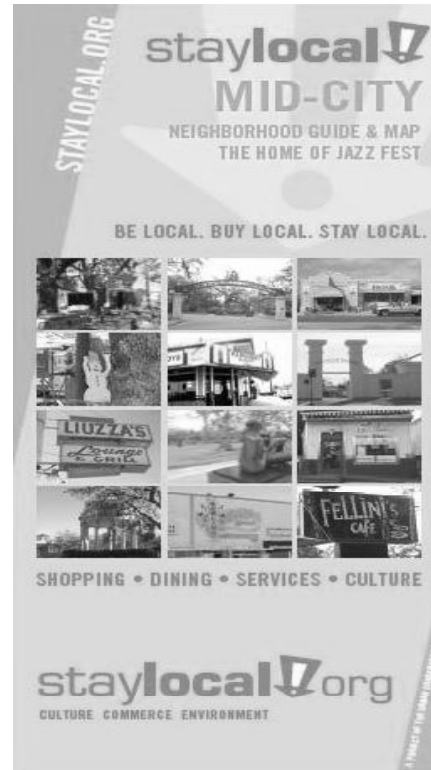
4) *Economic Restructuring*: Strengthening and diversifying the economy of a district is key to the success of an area. Creative and innovative use of unused or underused commercial space can provide spaces for new types of businesses. New business strategies, assistance in writing a business plan, and financial tools are discussed in Chapter VI.

MARKETING TOOLS

Several groups of business owners in cities across the country (including New Orleans) have promoted their shopping districts with brochures and web sites that advertise tax-free shopping days, holiday shopping activities, and neighborhood events while also offering a directory of local businesses. Some examples include the MidCity Business Association in the U Street Neighborhood of Washington D.C. and StayLocal! here in New Orleans.

The U Street Neighborhood in Washington, D.C. has been a center of African American culture dating back to the Civil War. In 2005, neighborhood businesses formed a business association to help more than 500 businesses access resources and customers through marketing, advertising, and training. Recently the area businesses invested in street banners to advertise the district and market the area as a destination retail center. The business association also hosts several community events that increase community support for their businesses and increase their competitiveness (a calendar of events can be found on their web page).

A local organization that is utilizing new technologies coupled with positive marketing schemes is StayLocal!. This organization promotes local businesses by creating marketing strategies and brochures for individual neighborhood shopping districts. The maps, brochures and list of businesses can be found on their web page. The web-site also provides a listing of all local businesses in New Orleans who have registered with the site. Stay Local strives to create strong economies based on locally owned and operated businesses.



www.staylocal.org



MidCity Business Association – Washington D. C.
www.midcitylife.com

ADDRESSING VACANCY AND BLIGHT

Vacancy in the project area is not a new phenomenon and certainly not simply the result of businesses unwilling to return after Hurricane Katrina. From the large regional shopping center along Chef Menteur Boulevard, to the small scale urban retail corridors on Paris Avenue, short term and permanent vacancy was, and is, a regular concern. Some business centers suffered more than others. Our analysis of the retail stock in the project area revealed a total occupied retail square footage of 594,660; unoccupied (vacant) retail spaces comprise 456,354. This means that, not considering vacant lots (of which there are many in the project area), retail vacancy is at 43.4% (according to our January and February 2009 inventory).

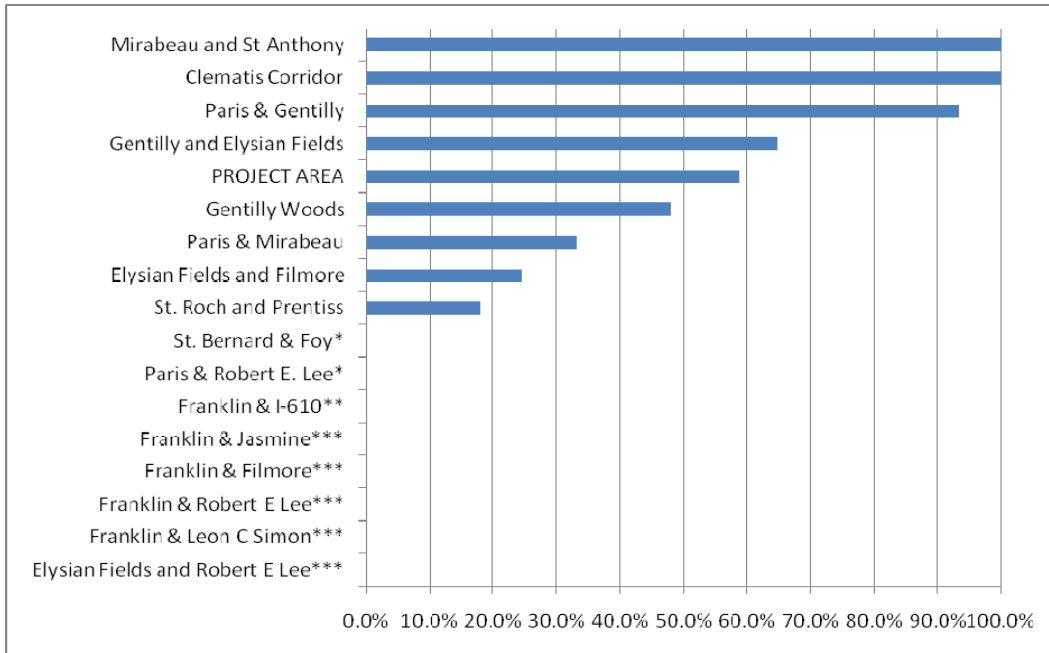
Figure 5.1 shows that comparison retail in the project area, where it exists, suffers from significant vacancy. Two centers, St. Bernard and Foy as well as Paris and Robert E. Lee, are completely vacant with regard to their comparison shopping. Notably, smaller nodes such as Mirabeau and St. Anthony along with the Clematis Corridor have comparison shopping that is completely occupied. The occupancy rate for the project area's comparison retail is 58.8 percent, meaning that **41.2** percent is vacant.

Figure 5.2 displays convenience shopping. Most occupancy rates are very low (less than 50 percent). Convenience retail in Paris Avenue and Gentilly Boulevard as well as Franklin Avenue and Leon C. Simon Drive is significantly more occupied than most nodes in the project area. The small node of St. Anthony and Mirabeau Avenues are once again fully occupied. The occupancy rate for the project area's stock of convenience retail is 55.6 percent, indicating a vacancy rate of **44.4** percent (close to, but slightly lower than, the figure for the project area's comparison retail).

In addition to vacant buildings, several vacant lots are present at project area intersections. At the time of this writing, the southeast corner of the intersection of Elysian Fields Avenue and Robert E. Lee Boulevard is now marked by three contiguous vacant lots. Farther south, on Elysian Fields at Filmore Avenue, the northwest corner is now a vacant lot (formerly a gas station). The larger shopping centers (Elysian Fields and Gentilly; Gentilly Woods and the Chef Menteur corridor) contain sporadic vacant lots as well. Combined with residential vacancy, the project area has a significant amount of unused lots. Not all of these lots may see retail and commercial establishments return, at least in the immediate future. Vacant lots are not always eyesores though. Sometimes they can be assets to a community, serving as a community gardens, neighborhood festival sites, farmers' markets, rain gardens, green space, and parking lots in the interim period until the demand for the land rises and they are built upon once again.

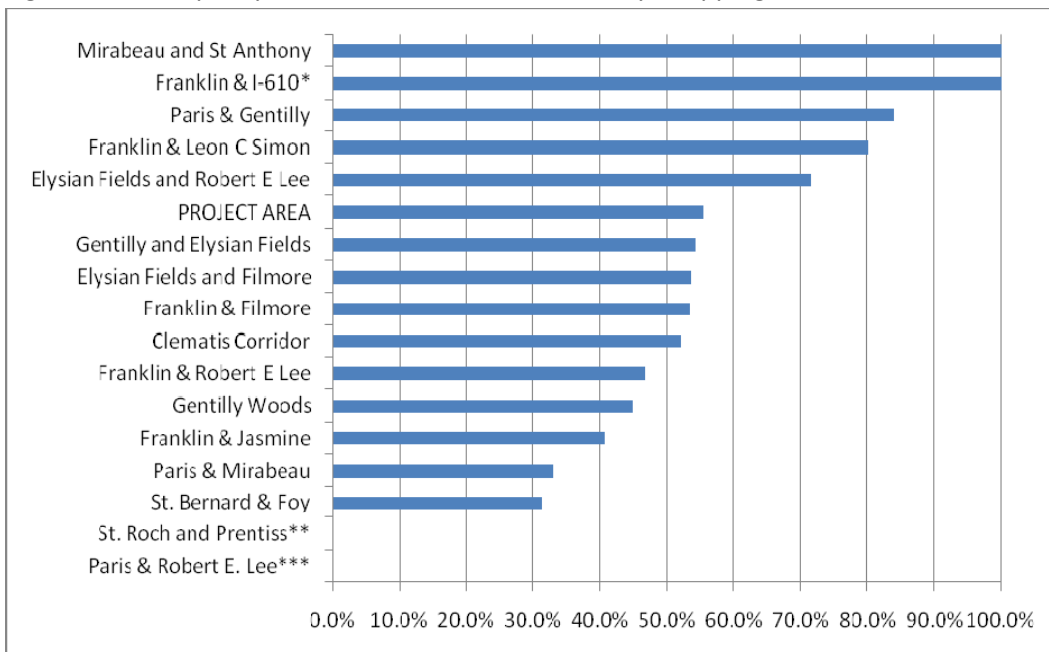
In the struggle to reclaim vacant and blighted property for productive uses, New Orleans is certainly not alone. Today most major American cities are devising strategies to redevelop or manage vacant land and abandoned buildings. According to a recent survey, about 15 percent of land in the average large American city sits vacant. In many cities this number is much greater. Where continued economic growth and high demand for retail exist, vacancy can be of great asset. Where economics are unfavorable to new development, local governments, along with the communities impacted by blight and vacancy, must intervene since vacancy and blight can tarnish an area's image and discourage private investment. Strategies differ according to the scale of the vacant lot or blighted structure.

Figure 5.1: Occupancy Rates for Comparison Retail by Shopping Center Intersection/Node



Period of Relevance: Surveys conducted in January and February 2009
** These areas have comparison retail square footage, but none of it is occupied.*
*** This area includes only a gas station (grouped under convenience goods).*
**** These areas report no comparison retail square footage.*

Figure 5.2: Occupancy Rates for Convenience Retail by Shopping Center Intersection/Node



Period of Relevance: Surveys conducted in January and February 2009
** This area includes only a gas station, which is occupied.*
*** This area reports no convenience retail square footage.*
**** This site is nearly completely vacant and has no convenience retail square footage.*

REBUILDING A BETTER RETAIL ENVIRONMENT

Multiple zoning tools can be used to control the design and scale of retail environments. Over the years, and most aggressively since Hurricane Katrina, the City of New Orleans has established zoning overlay districts designed to improve the aesthetic of many of the city's major retail commercial corridors. These districts include large portions of Claiborne Avenue, Chef Menteur Highway, Gentilly Boulevard, Elysian Fields Avenue, Earhart Boulevard, Canal Street, General De Gaulle Drive and all major highway corridors in New Orleans East. Several retail centers in the project area are within an existing overlay zoning district.

Here's how these districts work.

First, a developer approaches the city's permitting department to obtain the appropriate building permits to begin construction on a new structure or to renovate one that already exists. If the area selected for the project falls within the boundaries of the City-defined overlay district, the developer is required to meet building standards that fit the character or desired character for that site. Most of these standard were created to ensure that new development fits in harmoniously within the existing built environment. The City Planning Commission reviews these proposals and determines if what is being proposed meets the regulations of the overlay district. These special provisions regulate or mandate: landscaping, signage, land use, building design and placement, refuse, lighting and so forth. Figure is an example of current zoning regulations for Gentilly Woods and the Chef Menteur Highway commercial corridor.

At present, the City is in the process of crafting a new Comprehensive Zoning Ordinance that will dictate the way land is used and developed in New Orleans for the next twenty years. At this time, it is not clear if overlay districts will remain and if so what form they would take. However, should new regulations take into account the *trends in retail development* in urban areas they would stress the following objectives:

- Increase green space and decrease the amount and prevalence of surface parking;
- Increase pedestrian access and other amenities for those not arriving by automobile;
- Connect retail centers with the surrounding built environment;
- Regulate the placement and size of signs;
- Improve the relationship between the structure and the street by mandating maximum setbacks from the front of the site; to orient the building to the sidewalk and create a setting similar to a Main Street;
- Ensure that buildings are designed with a sense of place that incorporates or complements the local architectural aesthetic.

Figure 5.3: SAMPLE OF PRESENT ZONING REQUIREMENTS

UC Urban Corridor District	
Area Covered	Chef Menteur Highway between Peoples Avenue (on the west) and Michoud Levee (on the east)
Project Area Applicability	Gentilly Woods Shopping Center and surroundings
Signs	Maximum two attached and two detached signs per business. Attached signs can not be taller than the façade, detached can not be taller than 12 feet. No sign can flash or blink.
Landscaping	Must be present at the perimeter of the site and must cover at least 10% of the vehicular use area (parking lot). Trees must be 10feet in height at planting.
Fencing	No chain link fencing allowed. All loading zones must be screened with wood, brick or masonry fencing.
Curbs	Must be vertical (no roll over curbs). No curb cuts greater than 24 feet.
Off-Street Parking	1 space per 200-300 square feet of retail (depending on density of district)
Other Considerations	A litter abatement program must be registered with the City of New Orleans.

NEW ORLEANS BROWNFIELD REDEVELOPMENT

Some vacant lots and buildings in the project area are brownfields. On Elysian Fields Avenue alone, three decommissioned gas stations await site clean-up and underground tank removal so that they can be safely occupied at some point in the future.

“Brownfields are rural or urban industrial commercial sites that are abandoned or underused because of real or perceived contamination. Brownfields are a valuable community resource that through redevelopment and reuse could easily bring important benefits to many economically depressed communities or serve as the centerpiece in comprehensive redevelopment strategies.”

Brownfield redevelopment relies on strong coordination among stakeholders including local communities; local, state, and federal governments; private parties; and nonprofit organizations.

The redevelopment process typically follows four steps:

- 1) Pre-development;
- 2) Securing the deal;
- 3) Cleanup and development;
- 4) Property management.

There are multiple activities that may occur within each of these steps, and the order of these activities varies greatly.

Brownfield redevelopment projects differ in their complexities and scale. Brownfield redevelopment processes can be: privately-led, public-private partnerships or publicly-led.

Brownfields in the City of New Orleans are predominantly privately-led processes, and are a result of Environmental Protection Agency’s (EPA.gov) Brownfield Cleanup Revolving Loan Fund. The revolving loan fund provides low interest loans designed to be “seed” money to assist in the cleanup of environmental problems. Since the City of New Orleans began its Brownfields Program in 1995, 864 jobs were created using \$1.18 million of brownfields grants to leverage more than \$87.5 million of private funding sources.

A few examples of former brownfields sites that have been redeveloped include the American Can in Mid City, Whole Foods Market on Magazine Street, and Ashe Cultural Center on Oretha Castle Haley Boulevard (City of New Orleans, 2009).

In 2009, the National Brownfields Conference will be held in New Orleans. The main task of the National Brownfields Conference is to address strategies towards cleaning up and redeveloping abandoned, underutilized, and potentially contaminated properties nationwide.

NORA (New Orleans Redevelopment Authority)

The New Orleans Redevelopment Authority (NORA), formerly called the Community Improvement Agency (CIA), was created to eliminate and prevent the spread of slums and blight in the City of New Orleans. Its powers include acquiring real property through negotiation, gift, or expropriation; disposing of said property by sale or lease; borrowing money; issuing bonds; and providing security to support clearance and neighborhood development. Through its blighted property acquisition program, NORA has facilitated the expropriation and redevelopment of many of the city's approximately 30,000 vacant and abandoned properties. NORA's has implemented two programs to assist with redevelopment of the city.

REALM

The Real Estate Acquisition and Land-banking Mechanism (REALM) allows NORA to "work with other city agencies to acquire blighted properties in a strategic fashion and then bundle those properties for sale or donation. By focusing redevelopment efforts on a critical mass of properties within a circumscribed geographical area, REALM helps to leverage private and non-profit reinvestment in particular target neighborhoods" (NORAworks, 2009). This in turn incentivizes further private and non-profit reinvestment in the surrounding area. The only REALM property currently listed in the project area is a residential property located at 1340 Harrison Avenue.

THE LOT NEXT DOOR

The Lot Next Door (LND) only applies to property that NORA owns and it is not related to the former Sav-a-Lot program. By ordinance, the LND program gives adjacent property owners with a homestead exemption the first opportunity to purchase NORA properties at Fair Market Value (FMV). For the purposes of the ordinance, adjacent property owners only include owners to the left, and to the right of the eligible lot. Under the LND program, LND purchasers are expected to maintain these properties after acquisition, and may not transfer LND property for five years without payment of a penalty. Though relatively few now, over the next few years, NORA will eventually acquire 5,000 – 7,000 properties that will be examined for LND eligibility.

RECOVERY INFRASTRUCTURE INVESTMENT

Vacant lots and blighted commercial buildings are not the only detractors to investment. Sinking roads and their potholes create an unfavorable image for the project area and may damage vehicles and injure cyclists. The Department of Public Works and the Office of Recovery & Development Administration are currently undertaking the task of rehabilitating the city's infrastructure. Current projects in Gentilly include rebuilding the St. Anthony's walking path and improving neighborhood streets and landscaping improvements along Robert E Lee Boulevard. Additionally, two major streetscape projects are scheduled for Gentilly Boulevard and Robert E Lee Boulevard that will include sidewalk and pedestrian improvements. These public works projects are part of an ongoing investment in order to update and modernize the city's urban infrastructure as part of the city revitalization efforts since Katrina. Scheduled projects will provide several million dollars of infrastructure improvements.

CASE STUDY: Cumberland Crossing

Location: Valparaiso, Indiana

Size: 173,000 sq. ft.

Comparable to *Neighborhood Shopping Centers* within the Project Area

Background: Cumberland Crossing in Valparaiso, Indiana has recently undergone a major transformation. After years of decline and disinvestment, city officials decided it was time to breathe new life into the 1970s-era shopping center. With a nearby highway sending shoppers to a new big box shopping center over a mile away, it was clear that Cumberland Crossing could not compete in its current form. In 2005, the city hired a developer to recreate Cumberland as a \$35 million lifestyle center development.

What Happened Next: The city used its powers of eminent domain to take ownership of the nearly empty property and donated the land to a well-known retail redevelopment firm. The firm reworked the site from the ground up, developing a new design, adding pedestrian amenities such as crosswalks, lush landscaping and attractive lighting, and securing new tenants.

Already having attracted national and local retailers, the developers hope to attract a grocery store that will truly make the site a community amenity. The city added to the attractiveness of the new center by improving the roads that lead up to it: paving them and adding a traffic signal to better the flow of traffic and make it an environment safe for pedestrians.

Application of Current Trends: Lifestyle centers are seen as a way to reinvigorate older shopping centers that have not remained competitive. In this case, the city expropriated the land, which was no longer profitable, to a developer with a strategy to bring the center back to life through redesign and focusing on the shopping experience.



CASE STUDY: Sugar Creek Charter School

Location: Charlotte, NC

Comparable to *Regional Shopping Centers* within the Project Area

“The Sugar Creek Charter School is in a renovated K-Mart in Sugar Creek, an area in Charlotte, NC. The school was opened in January of 2000, and had previously been housed in an abandoned recreation center nearby. The school has approximately 500 students, and employs 56 teachers. Sugar Creek is a neighborhood in Charlotte, NC, and the community had been dealing with a lack of proper educational facilities for some time. The Charter School is the community's response to this.” (BigBoxReuse, 2004).

Best Practices

“The renovation of a big box building is a major undertaking. Although the buildings are easily adaptable, usually with fairly new electrical and structural elements, the fact of the matter remains: big box buildings are very, very big. The process of taking a roughly 100,000 square foot room, breaking it into several smaller room and hallways, and getting the building ready for a drastically different use is a major project that involves major money and time. This fact is true at many sites, including at the Sugar Creek Charter School, where the school is currently only using about half of the space in the old K-Mart. This is not because they only need half of the space, but simply because the renovation is being done in stages, as time and money will allow. While standing in the dark, empty half of the space, the director of the school pointed out the hope that lies in the empty half of the old K-Mart. One day this empty half will house a new cafeteria, gymnasium, and more classrooms for the school,” (Big Box Reuse, 2004).

Financing Tools

The project was funded through the North Carolina Charter School Program and bonds issued on anticipated enrollment fees.

Success of the Project

The project is considered a success by residents in Charlotte for adapting and reusing a large empty retailer for much needed educational space. The limitations of the project are the unused square footage of the Kmart that must be maintained.



www.bigboxreuse.com/sugarcreek

CHAPTER VI – FINANCIAL TOOLS AND INCENTIVES

Being an entrepreneur involves assuming a certain amount of risk. Significant amounts of resources are available for individuals and groups willing to invest their time and money into starting, acquiring, or expanding their businesses. The following section provides a brief overview of resources entrepreneurs can utilize in order to ease the difficulties they may face in their ventures.

FINANCIAL TOOLS AND INCENTIVES

BUSINESS IMPROVEMENT DISTRICT (BID)

Business Improvement Districts are a method to finance quality of life, aesthetic and pedestrian improvement projects. BIDs operate much like a homeowners association where each business pays into a collective pool to provide ongoing maintenance and capital improvements that benefit all members of the association.

The purpose of a BID is to purchase services beyond what is typically provided by the city, allowing business and property owners to make a collective contribution to the maintenance, development, and promotion of their commercial district. The types of services offered can be wide-ranging dependent upon the size and location of the district. Some of the services include security, maintenance, sanitation, and landscaping.

Business Improvement Districts represent an entrepreneurial approach on behalf of business associations and participating business-owners to take action to solve local problems. The feasibility of a Business Improvement District within the Gentilly should be determined by business owners.

In 2003, BIDs became easier to implement due to the passage of the Louisiana Business Improvement District Act (LA RS 33:2740.71-33:2740.88). The act permits the establishment of BIDs via local ordinance rather than the previous required legislative action approved through a local election process. While the establishment of a BID no longer requires state action, certain requirements must be included in the local ordinance.

The following elements are requirements to establish a BID:

- Boundary of the district
- Written consent by all landowners whose property is within the district
- Designation of five individuals to serve as the District Board
- Proposed name of the district
- Provide a detailed map of the proposed district showing existing infrastructure
- Cost estimates and construction timetables for district improvements

A public hearing must be held within 45 days of the petition's submission, during which member of the public will be given an opportunity to comment on the BID. Within 5 years of establishment, the local board of commissioners must create a development plan or at least one landowner within the district must receive a development permit. If neither of these conditions is met, the BID is automatically dissolved.

RESTORATION TAX ABATEMENT (RTA)

The Restoration Tax Abatement (RTA) Program is an economic development incentive created for use by municipalities and local governments to encourage the expansion, restoration, improvement and development of existing commercial structures and owner-occupied residences in Downtown Development Districts, Economic Development Districts or Historic Districts. With the RTA Program, qualifying districts are eligible to have ad valorem property taxes on substantial renovations and improvements deferred for 5 years. Additionally, some RTA contracts may be renewed for a second 5-year period if approved by the local governing authority.

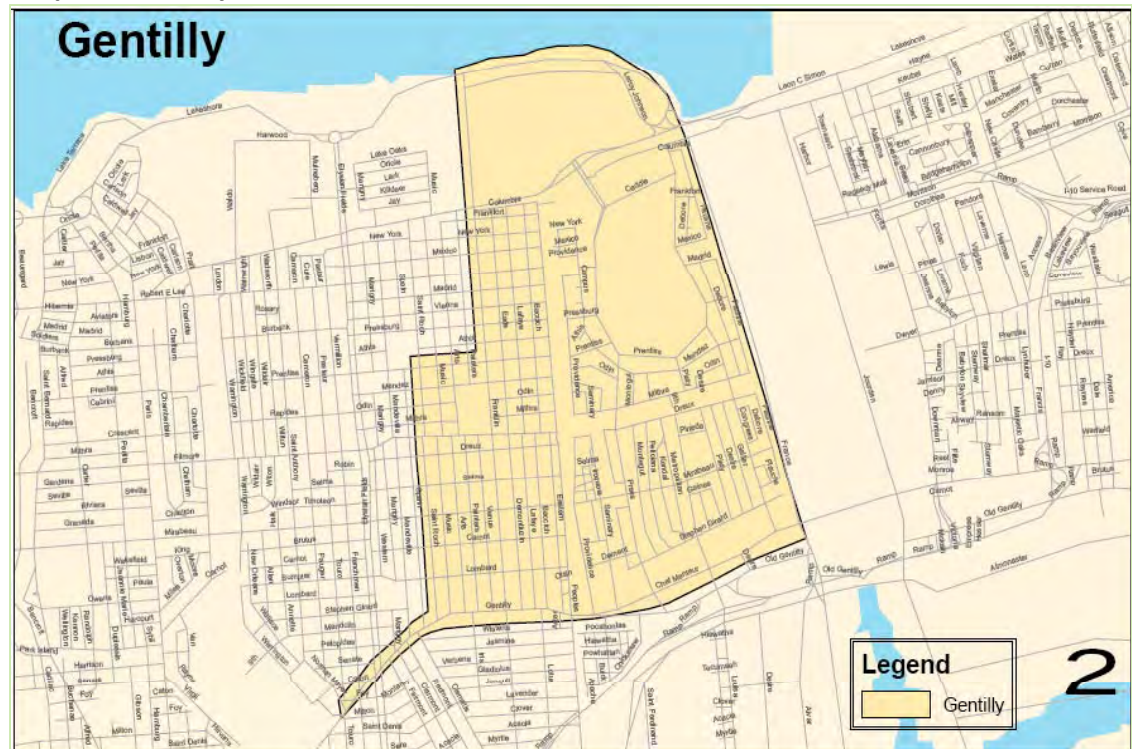
The Restoration Tax Abatement Program grants deferment of the ad valorem property taxes normally assessed on renovations and improvements. Commercial property owners and homeowners who expand, restore, improve or develop an existing structure in a qualifying district, ad valorem taxes are based on the assessed valuation of the property prior to the commencement of the improvements. If the property is sold, the contract may be transferred, subject to local government and board approval.

The Restoration Tax Abatement Program is not available, if property taxes have been paid on the improvements made by the project. Additional limitations of the RTA Program include: the ineligibility of Enterprise Zones and Economic Development Zones; the exemption of the acquisition cost of the structure; and the exclusion of machinery and certain equipment used in the business, including furniture and fixtures.

Today, the City of New Orleans has numerous districts taking advantage of the Restoration Tax Abatement Program. Any qualifying district within Gentilly is eligible to have ad valorem

property taxes on substantial renovations and improvements deferred for 5 years and renewable up to 10 years. Qualifying districts include the Gentilly Terrace Historic Neighborhood and the Gentilly- Pontchartrain Park Cultural District (see map below).

Map 6.1: Gentilly -Pontchartrain Park Cultural District



Source Louisiana Department of Culture, Recreation and Tourism

ENTERPRISE ZONES (EZ)

Enterprise Zones in Louisiana offer two unique tax benefits: job tax credits and sales/use tax rebates. EZs are typically areas with under employment, low income or a high percentage of residents receiving public assistance. Businesses that expand or locate in designated enterprise zones can qualify for state income or corporate franchise tax credits for each new employee they hire. The program provides a one-time \$2,500 tax credit for each certified net new job created. Job tax credits can be carried forward for up to 10 years. Additionally, up to a maximum 30-month construction period businesses can rebate state sales/use taxes paid on equipment, machinery and construction materials. Essentially, participation in an EZ program can significantly reduce state income tax burdens for small businesses.

A stipulation to receive the tax credits requires that 35% of all new employees (roughly 2 out of 5) must either live in a designated enterprise zone, have graduated from a technical college within 6 months, receive some form of public income assistance, and/or have a physical or mental disability. Additionally, a company must either hire five new employees within two years or increase their current workforce by 10% within in a year.

Gentilly is in a unique position to capitalize on EZs use because of their proximity to the major commercial nodes and revitalization areas. Enterprise Zones include the western portion of Gentilly Boulevard & Elysian Fields Avenue intersection, sections of Pontchartrain Park and Gentilly Woods neighborhoods, and areas surrounding the vacant Gentilly Woods Shopping Center. Additionally, many areas with smaller

neighborhood nodes have high rates of coverage including the area north of Florida Avenue to Mirabeau Avenue between Wisner Boulevard and Elysian Fields Avenue. To see if a specific node qualifies see the Enterprise Zone maps (pink designates EZ).

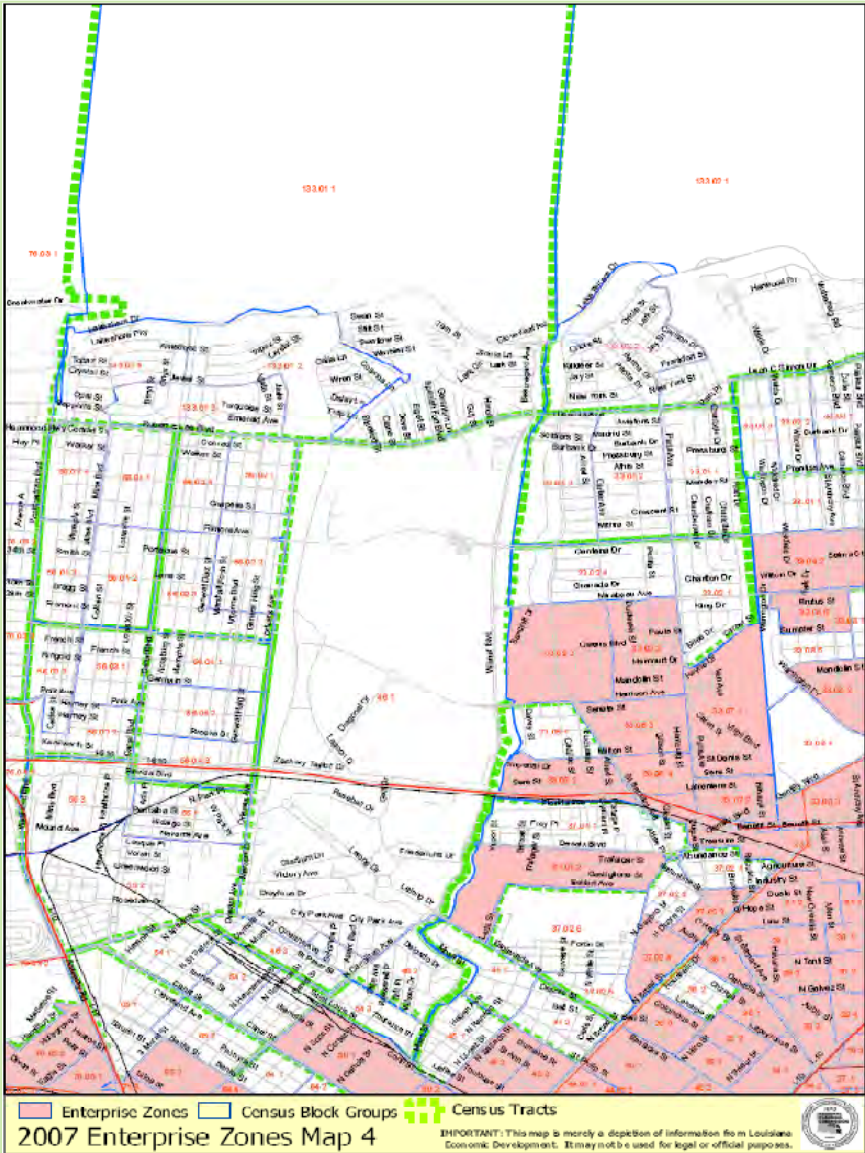
Louisiana's Economic Development Department through the Business Incentives Services program administers the tax benefits, it is necessary to notify them before hiring, construction, or starting facility improvements in order to receive the benefits.

For more information on Enterprise Zones access the Louisiana Economic Development Corporation's publication:

Enterprise Zone Program – The Facts

www.louisianaforward.com/uploads/pdf/EZ_Facts_8.08.pdf

Map 6.2 & 6.3: 2007 Enterprise Zones for Gently



Maps Courtesy of Regional Planning Commission

STRATEGIES FOR FINANCING DEVELOPMENT

TAX INCREMENT FINANCING (TIF)

Tax Increment Financing has grown recently in Louisiana as an important economic development tool. TIFs allow cities to create special districts to make public improvements within those districts that will encourage private-sector development.

How TIF districts work: A city or community determines the initial assessed tax value (sales or ad valorem) for property within a defined district; this base amount continues to be allocated into general fund revenues. However, in each year thereafter, the municipal treasurer transmits to the new district all tax revenues that exceed that base amount, which captures increased assessed value. TIFs are a way for designated districts to capitalize on future economic development funds.

In 2003, Louisiana approved an amendment permitting the use of TIFs. Most TIFs in other parts of the country use property tax revenue as the captured asset, Louisiana additionally permits the captured asset through sales tax. Similar to TIFs that use captured property tax increases, sales-tax TIFs use sales tax revenue increases to provide infrastructure improvements and to direct investment into the TIF district.

The creation of a TIF requires a district with a well-organized development and reinvestment plan to manage the captured assets. The process for creating a TIF involves both city and state approval and a transparent management process and requires the creation of a Board to manage the district. Although there are few examples of TIFs used directly in the recovery of neighborhoods due to disasters, it is an important tool that Gentilly can utilize for large-scale development projects.

GULF OPPORTUNITY (GO) ZONE

Orleans parish businesses and residents have until December 31, 2010 to take advantage of special incentives offered by Congress to catalyze redevelopment after Hurricane Katrina. GO Zone benefits can be utilized by all types of business entities including corporations, privately owned businesses, non-profits organizations and community development corporations. GO Zone participants can benefit in two different ways, either income tax credits or low-interest financing.

GO Zone tax benefits include a bonus depreciation provision, which allows the owner to deduct a tax credit worth 50% of the depreciation value of the building after redevelopment. GO Zone tax benefits also allow small businesses to write off equipment purchases up to \$100,000 against income liability. In order to qualify, the property needs to be in Orleans Parish. If utilizing tax benefits the business relinquishes the GO Zone financing option listed below.

The Gulf Opportunity Zone Act of 2005 allowed Louisiana to offer tax-exempt bonds to finance redevelopment. The state granted New Orleans the authority to allocate up to \$1.2 billion worth of these bonds. Since these bonds are publicly issued, they receive tax-exempt status, which reduces the tax-liability of bond purchasers. The federally allocated money needs to be sought after aggressively by Gentilly businesses, at the time of this report; over \$500 million in GO Zone financing remains unallocated by New Orleans. The deadline for the city to allocate the money is December 31, 2010.

Tax-exempt private activity bonds typically have a 1.5-2% lower interest rate than market financing. The lower interest rate can save borrowers thousands of dollars in building construction/rehabilitation financing. GO Zone bond financing provides Gentilly business owners a valuable line of credit to construct and/or rehabilitate commercial properties.

GO Zone bonds can be used for non-residential development including: property acquisition, construction, renovation and/or facility improvements. A requirement to use bond financing to purchase property includes investing at least 50% of the purchase price into the building's rehabilitation. Additionally, 95% of bond funds have to be spent on direct project expenses. Once a bond is approved, the borrower enters in a mortgage agreement to make payment either monthly or annually to extinguish the bond. It is the responsibility of the borrower to pay back the entirety of the bond. In exchange for issuing the bond, the public transfers all liability for repayment to the borrower.

To apply, a borrower needs to develop a business plan and file bond applications (business plan included) with ORDA and the State Bond Commission. ORDA is the local economic development authority able to issue the bonds. ORDA initially approves the application and sends a recommendation to the State Bond Commission for approval. The average approval process, from beginning to end, takes approximately 240 days.

In order to capitalize on the low interest financing, the GO Zone bond application process should start no later than the spring of 2010. There is a one-year window of opportunity to facilitate the development of business plans to apply for financing.

Eligible projects may include, but are not limited to retail stores, grocery stores, warehouses, manufacturing facilities, office buildings, bank branches, hotels, restaurants, medical hospitals and clinics. Private activity bonds flexibility makes them a primary vehicle for redevelopment financing.

Neighborhood associations that focus on business plan development for small businesses can serve a vital role in accessing these federally subsidized redevelopment funds. Additionally, ORDA could expedite GO Zone lending by setting up a task force to provide bond counsel and underwriting services that facilitate the flow of credit for economic development to small businesses.

Two notable banks, Hancock Bank and Regions Bank, have actively sought GO Zone business and have published additional information on GO Zone benefits. Additionally, Phelps Dunbar, a law firm with roots in New Orleans, has a dedicated Go Zone team to serve as privately retained bond counsel.

FOR MORE INFORMATION ON THE GULF OPPORTUNITY ZONE SEE:

Hancock Bank. *Louisiana Gulf Opportunity Zone Act (GO Zone)*. Accessed @ http://www.hancockbank.com/small_business/GO_Zone/LouisianaGOZone.pdf 10

Morgan Keegan, Inc. *Rebuilding Louisiana Under the Gulf Opportunity Zone Act*. Accessed @ http://www.gozonebonds.com/pdfs/Louisiana_GOZB.pdf 11

Phelps Dunbar. *Major Tax Incentives for Development after the Gulf Opportunity Zone Act of 2005*. Accessed @ http://www.phelpsdunbar.com/pages/hurricane/GO_Zone.pdf

SMALL BUSINESS ADMINISTRATION (SBA)

SBA 7(a) PROGRAM

The 7(a) program is the most widely used of all the SBA programs. The purpose of this program is to provide access to loans to assist small businesses including the expansion of an existing business, acquiring land, equipment, and/or the restructuring of debt. Loans under \$150,000 carry a guarantee of up to 85% while the maximum guarantee amount, \$1.5 million, can have a guarantee of up to 75%.

Three Simplified Steps:

1. The borrower establishes a relationship with a private lender from whom they wish to receive financing.
2. The borrower submits complete application and business proposal to lender.
3. SBA makes a determination regarding the loan proposal.

Important Information:

- The private lender sets the interest rate, monitors the loan, and the repayment schedule with certain requirements set by the SBA.
- Interest rates caps are between 2.15% and 4.75% over prime depending on the amount and term of the loan.
- The Preferred Lender and Certified Lender Programs are mechanisms in place in order to expedite the financing process for both the lender and borrower.
- All for-profit businesses are considered for approval with the exception of establishments concerned primarily with gambling, real estate speculation, lending, and illegal activities.

SMALL BUSINESS DEFINITION

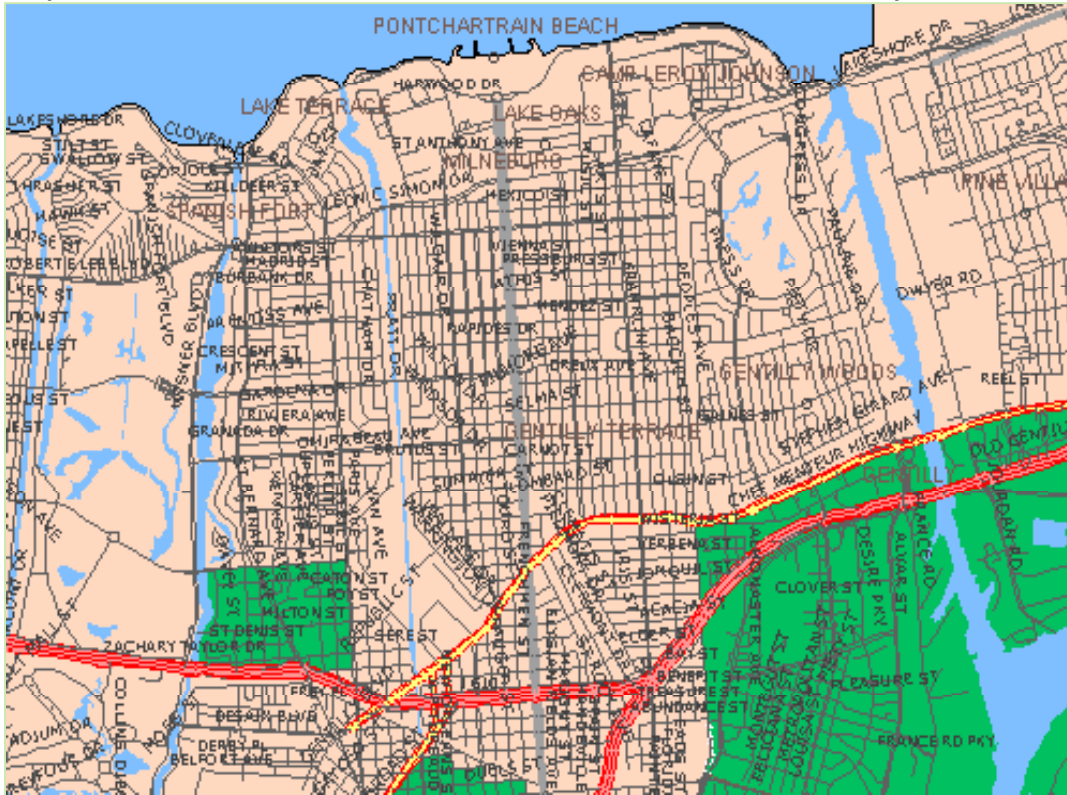
The SBA defines small businesses by the average annual receipts or number of employees. Generally, the SBA considers a business 'small' if their average annual receipts do not exceed a range of \$7 million to \$29 million depending on the type of establishment as classified by the North American Industry Classification System. The Louisiana Development Corporation relies on the SBA's definition as the standard for their programs.

HISTORICALLY UNDERUTILIZED BUSINESS ZONES

The HUB Zone Empowerment Contracting program provides federal contracting opportunities for qualified small businesses located in distressed areas. Fostering the growth of these federal contractors as viable businesses, for the long term, helps to empower communities, create jobs, and attract private investment. The HUB Zone Empowerment Contracting program was enacted into law as part of the Small Business Reauthorization Act of 1997. The program falls under the auspices of the U.S. Small Business Administration. The program encourages economic development in historically underutilized business zones - "HUB Zones" - through the establishment of preferences.

SBA's Hub zone program is in line with the efforts of both the Administration and Congress to promote economic development and employment growth in distressed areas by providing access to more Federal contracting opportunities.

Map 6.4: HUB Zones have been established in the St. Bernard and Gentilly Woods areas.



Source: Small Business Administration, HUB Zone <http://map.sba.gov/hubzone>

Current HUB Zones in the Gentilly neighborhood are along Gentilly Blvd near the Gentilly Woods area and the St. Bernard Housing Development (see map left). HUB Zone designation is a tool for small businesses that act as vendors or federal contractors. Gentilly could market HUB Zone designation to small businesses to open new locations within Gentilly so that they are in a HUB Zone designated district.

SBA's responsibility in the HUB Zone Program:

- regulates and implements the program;
- determines which businesses are eligible to receive HUB Zone contracts;
- maintains a listing of qualified HUB Zone small businesses Federal agencies can assist with locating vendors;
- adjudicates protests of eligibility to receive HUB Zone contracts; and
- reports to the Congress on the program's impact on employment and investment in HUB Zone areas.

LOUISIANA ECONOMIC DEVELOPMENT CORPORATION (LEDC)

LEDC SMALL BUSINESS LOAN PROGRAM

The Small Business Loan Program offered by the Louisiana Economic Development Corporation is a resource small business can use to receive financing for the purchase of land, building, equipment, and inventory needs. Loans under \$650,000 carry a guarantee of up to 75%, while the maximum guarantee amount is \$1.5 million.

Three Simplified Steps

1. The borrower must establish a relationship with a private lender they wish to receive financing from.
2. Applicants must submit a business plan to a private lender as well as a copy to the LEDC including the lender's contact information.
3. The business owner must provide collateral and at least a 10% equity investment in order to secure the financing.

Important Information:

- The private lender will set the interest rate, monitor the loan and the repayment schedule with certain requirements set by the LEDC.
- The loan may not exceed a 20-year term and interest rate must not exceed 2.5% over prime.
- All for-profit businesses are considered for approval with the exception of establishments concerned primarily with the service of alcohol, gambling, real estate speculation, non-franchise restaurants, and/or the refinancing of existing debt.

LEDC MICRO-LOAN PROGRAM

The LEDC's Micro-Loan Program is a financing tool that provides small businesses with the opportunity to receive small, short-term loans. The LEDC guarantees up to \$50,000, or 80% of \$62,500, under the Micro-Loan Program. Loans in which the LEDC participates in are guaranteed up to 50%, at a maximum of \$25,000.

Three Simplified Steps:

1. The borrower must establish a relationship with a private lender from which they wish to receive financing. The business owner must have been declined from two different lending institutions before the LEDC will consider participation.
2. The private lender sets the interest rate, monitors the loan, and the repayment schedule with certain requirements set by the LEDC.
3. Borrowers are required to attend a program aimed at increasing their management skills as approved by the LEDC.

Important Information:

- The LEDC will provide a guarantee for loans from a lender or the participation in the loan itself.
- Interest rates on loans issued through this program cannot exceed 4% over prime.
- Ineligible establishments include businesses concerned primarily with the service of alcohol, gambling, real estate speculation, non-franchise restaurants, creation of an amusement park, and/or the refinancing of existing debt.

RESOURCES FOR ENTREPRENEURS

The Louisiana Small Business Development Center (LSBDC) provides training and counseling to businesses within the state. Free or low cost seminars are regularly held covering a variety of topics.

Greater New Orleans Region-Main Office
 UNO Jefferson Center
 3330 N. Causeway Blvd, Suite 422
 Metairie, LA 70002
 (504) 831-3730
www.lsbdc.org

The Small Business Administration is a federal agency focused on providing small business owners with financial assistance and counseling.

Louisiana District Office
 365 Canal St., Suite 2820
 New Orleans, LA 70130
 (504) 589-6685
www.sba.gov

Louisiana Economic Development Corporation offers incentives, financing tools, and counseling for current and potential business owners in Louisiana.

1051 North Third Street
 Baton Rouge, LA 70802-5239
 (800) 450-8115 & (225) 342-3000
www.ledlouisiana.com

Stay Local! is an organization focused upon promoting and assisting locally owned businesses in New Orleans.

2803 St. Philip St.
 New Orleans, LA 70119
 (504) 831-3730
 (504) 617-6618 fax
www.staylocal.org

ADDITIONAL ONLINE RESOURCES

Business Owner's Toolkit is a comprehensive business resource website with helpful information on a variety of topics including marketing, finance and asset protection. www.toolkit.com

Bplan.com offers free samples and how-to-articles for developing marketing and business plans and offers trial software programs and business plan templates. www.bplan.com

Louisiana Business Incubation Association is an organization composed of business incubators in the state of Louisiana, which aims to improve communication between its members, governmental agencies, and economic developers in the state. www.lbia.org

APPENDICES

Table 1. 2008 Population Demographics

	Project Area	Orleans Parish	USA
Population	26,337	321,466	309,299,265
Male	44.6%	47.0%	49.1%
Females	55.4%	53.0%	50.9%
Households	9,482	122,479	116,384,754
Average Household Size	2.65	2.52	2.59
Median Age	37.4	34.6	36.8
Median Household Income	\$38,921	\$33,099	\$54,749
Per Capita Income	\$18,127	\$18,704	\$28,151
Race and Ethnicity:			
White Alone	20.7%	30.3%	72.3%
Black Alone	75.2%	64.2%	12.6%
Other	4.1%	5.6%	15.0%
Hispanic Origin (Any Race)	3.6%	4.3%	15.4%

Source: ESRI Business Analyst Online, accessed through GCR and Associates

The high median age in the project area shown in Table 1 is reflected in the age groups of Table 2. The project area has a higher percentage of senior citizens than the USA and Orleans Parish. Interestingly, the project area has a similar ratio of youth, 19 years or younger, to both USA and Orleans parish rates. This may mean that families are more mature in the project area or possibly that parents with children are more likely to live with older family in this area.

Educational attainment is higher in the project area with more high school graduates that go on to college, although they may not obtain an official degree. Also, the project area has a smaller percentage of population that did not graduate high school, meaning fewer high school dropouts than compared to Orleans or the US. Advanced degree attainment in the project area remains equivalent to Orleans and national rates.

The project area represents one of the most diverse communities in Orleans Parish with a population that is three quarters African American. The area has an average household size comparable to the nation with more mature residents that create a higher median age than the rest of Orleans parish. Household income for the project area is much lower than the national average however still above the rest of Orleans parish. Conversely, the per capita income (or income per person) is lower in the project area. Thus the higher household income may be a consequence of a slightly higher average household size than Orleans parish. Larger households provide more income producers and thus a higher household income.

Table 2. 2008 Age and Education Demographics

	Project Area	Orleans Parish	USA
Population Age Cohorts:			
19 Years or younger	27.4%	27.6%	27.2%
20 to 54 Years	45.9%	50.1%	49.1%
55 Years and Over	26.8%	22.3%	23.7%
Population 25+ Educational Attainment:			
Without H.S. Diploma or Equivalent	16.1%	20.3%	16.4%
High School Graduate or Equivalent	26.1%	24.5%	29.6%
Some College, No Degree	24.3%	21.8%	20.1%
Associates/Bachelor's/Graduate/Professional Degree	33.4%	33.4%	33.9%

Source: ESRI Business Analyst Online, accessed through GCR and Associates

Table 3. Housing Statistics, 2008

	Project Area	Orleans Parish	USA
Housing Units:	19,002	213,264	129,997,839
Owner Occupied HUs	34.7%	27.6%	60.6%
Renter Occupied HUs	15.2%	29.9%	28.9%
Vacant Housing Units	50.1%	42.6%	10.5%
Median Home Value	\$85,062	101,207	\$182,960
Median Rent	\$363	\$378	\$519

Table 3 shows that the project area is still recovering from Hurricane Katrina with less than half of the available housing units occupied three years after the storm. However housing cost are less expensive due to lower home values and rent medians that are less than Orleans and the nation. Additionally, housing choice is limited in the project area with only 15 percent of the occupied housing units let out to renters. Owner occupied units are the majority of the occupied dwellings in this area. These vacant units may represent deteriorating housing stock which will discourage future residents from locating to the project area.

Population projections for 2013, shown in Table 4, present a project area that is continuing its recovery from Hurricane Katrina in 2005. By 2013 the population is expected to increase by over 10 percent with higher median and per capita income. However the number of available housing units is expected to decrease by nearly 40 percent, vacant units are expected to drastically be reduced by 87 percent. These contrary figures of increased population and decreased housing units, can be explained by the demolition of excess housing stock over the five year period with the new residents moving into the remaining housing or constructing new homes. Most new residents will be homeowners although the number of renter occupied housing units will double from 2008 numbers. Overall, the 2013 projections present a recovering neighborhood with more open space and fewer residents than before Hurricane Katrina.

Table 4. Projections for the Project Area

	2008	2013	Change
Population	26,337	29,501	12.0%
Male	44.6%	44.8%	0.4%
Females	55.4%	55.2%	-0.4%
Households	9,482	10,715	13.0%
Average Household Size	2.65	2.64	-0.4%
Median Age	37.4	38.0	1.6%
Median Household Income	\$38,921	\$42,605	9.5%
Per Capita Income	\$18,127	\$19,617	8.2%
Race and Ethnicity:			
White Alone	20.7%	21.4%	3.4%
Black Alone	75.2%	74.4%	-1.1%
Other	4.1%	4.2%	2.4%
Hispanic Origin (Any Race)	3.6%	3.8%	5.6%
Housing Units:	19,002	11,455	-39.7%
Owner Occupied HUs	34.7%	62.8%	81.0%
Renter Occupied HUs	15.2%	30.8%	102.6%
Vacant Housing Units	50.1%	6.5%	-87.0%
Median Home Value	\$85,062	\$92,131	8.3%
Median Rent	\$363	n/a	n/a
<i>Source: ESRI Business Analyst Online, accessed through GCR and Associates</i>			

RETAIL DEMAND DETAILED METHODOLOGY

Step 1: Field work with on-the-ground assessments of occupancy, vacancy and usage. For the purposes of the retail analysis, only occupied units were used to calculate supply and demand.

Step 2: Establish square footages of businesses using approximate measurements from Google Earth.

Step 3: Map the customer base using ESRI Business Analyst Online. For Pedestrian Shopping, we used a pedestrian customer base that focuses on the characteristics of the population within a one-fourth mile radius of commercial area. For Regional, District, and Neighborhood Shopping, the customer base includes the population that is within a *two-minute drive time* of the commercial area. We assume here that larger shopping areas located along major thoroughfares that provide significant parking derive customers from a larger trade area. These customers will typically arrive by automobile, chiefly, and public transportation, secondarily. Thus, a two-minute drive time is used. It should be noted that a two-minute drive time is a function of distance alone (without considering traffic lights, heavy traffic on a particular corridor, seasonal road work, etc.) and is therefore likely underestimates actual travel time. We assume also that the smallest retail spaces oriented towards sidewalks will draw a considerable pool of customers from the surrounding neighborhood. These customers will likely arrive on foot, bike or will have driven a short distance. Thus, a one-fourth mile radius ring from the particular intersection of the Pedestrian Shopping node is used to collect the appropriate demographic data.

Step 4: Calculate Supply. Once square footage for retail is ascertained, these square footage figures (grouped by retail category) were multiplied by the sales per square foot that such a store could anticipate according to the *ULI Dollars and Cents of Shopping Centers* report. This results in the potential retail sales given the amount of space available. This is the retail supply only. It disregards consumer spending or demand.

Step 5: Calculate Demand. The customer base population (within a two-minute drive time polygon *or* within ¼ mile of a Pedestrian node) is multiplied by that geography's per capita income, to show the *total income* for the area of study. That income is then divided into the proportions that people generally spend on different good and services. These proportions derive from the Bureau of Labor Statistics Consumer Expenditure Survey. For example, areas with a per capita income of \$22,000 generally spend 42 percent of their income on retail, and 10 percent (or \$924) of that retail expenditure on furniture and home equipment specifically.

Step 6: Consider Retention Rates: A typical consumer will make purchases in a variety of places throughout the city. Consequently, not all of the retail expenditure will be made in the same area one lives. The *retention rate* indicates how much of a local consumer's expenditures are spent in that locality. Some examples:

- 1) If the average customer goes shopping for convenience goods (i.e. groceries) once a week, in a year that individual will make 52 trips. If they only go to the local (or nearby) grocery store 5 times in a year, that is a retention rate of slightly less than 10 percent (5 out of 52).

- 2) If the average person in an area eats out 5 times a week and only once a week at restaurants within that resident's particular neighborhood, the retention rate for sit-down restaurants is 20 percent for that neighborhood. Without a detailed survey process of customer shopping activity, this study could not ascertain the exact retention rate. Therefore, we present data not in terms of a fixed retention rate (which is not known and is difficult to estimate), but a variable rate to be able to demonstrate the ideal retention rate for the project area.

In addition to retention rates for the study area, people that come in from outside the study area were given additional consideration using *inflow* and *draw rates*. Here are some examples:

- 1) If an average of 20 nonresidents per day visits a neighborhood's restaurant, the inflow is twenty. If those same people go out to eat an average of 10 times a week, and only once a week in the study area, the draw rate is 10 percent.
- 2) If an average of 1,000 nonresidents come into the Study Area daily for home improvement purchases, the draw rate is 1,000. If those same 1,000 people shop for home improvement goods once a month, and come into the study area only three times a year (out of twelve months) the **draw rate** for those 1,000 customers is 25 percent (3 monthly trips out of 12 months). The result of both *retention* and *draw* is an estimation of sales potential that accounts for the extra spending provided by nonresidents of the Study Area.

Step 7: Compare supply and demand. Supply is the potential sales based on the amount of square feet dedicated to the sale of certain goods or services. Demand is the local consumer expenditures on those same goods.

If supply exceeds demand: There may be more supply than necessary and/or the available square footage of retail may be drawing lower than expected expenditures. Increasing the retention of local customers and the draw of outside customers will increase sales and reduce the gap in supply and demand. But this retention must be considered realistically and on a case-by-case basis.

If demand exceeds supply: The expenditure potential for the area is not yet realized. This could indicate an opportunity for increasing the available retail space. It could also indicate atypically high sales volume at the type of store with "excess" demand. But this too must be considered on a case-by-case basis. Most neighborhood retail nodes do not have retail space dedicated to the sale of household textiles, to name just one store type, and a retail demand for these products does exist, but numerous other factors must be considered before a new store is opened: zoning, location, accessibility, nearest competitors, etc.

Table 5. UNO Retail Survey

RETAIL CATEGORIES	SQUARE FOOTAGE OF RETAIL SPACE (Source: UNO Business Survey Jan. 2009 & approximate measurements using Google Earth)															
	Clematis Corridor		Elysian Fields & Filmore		Elysian Fields & Robert E Lee		Franklin & Leon C Simon		Franklin & Robert E Lee		Franklin & Filmore		Franklin & Jasmine		Franklin & I-610	
	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied
COMPARISON GOODS SUBTOTAL	2040	0	1800	4330	0	0	0	0	0	0	0	0	0	0	0	0
APPAREL & SERVICES	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>MENS & BOYS</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>WOMEN AND GIRLS</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>CHILDREN'S</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>SHOES</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>OTHER APPAREL</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
FURNITURE & HOME EQUIPMENT	0	0	1800	4330	0	0	0	0	0	0	0	0	0	0	0	0
<i>TEXTILES</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>FURNITURE</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>HOME IMPROVEMENT</i>	0	0	1800	4330	0	0	0	0	0	0	0	0	0	0	0	0
<i>APPLIANCES (Small & Major)</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ENTERTAINMENT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>READING</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>OTHER (Florist)</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AUTO-RELATED	2040	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>AUTO SALES</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>AUTO REPAIR</i>	2040	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: UNO field survey January 2009

Continued on opposite page

Gentilly & Elysian Fields		Gentilly Woods		Mirabeau & St Anthony		Paris & Gentilly		Paris & Mirabeau		Paris & Robert E. Lee		St. Bernard & Foy		St. Roch & Prentiss		TOTAL	
Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied
97784	0	88382	0	3468	0	7910	564	12000	0	0	3106	0	1951	2670	3519	216054	13470
27224	0	30025	0	0	0	3828	423	8500	0	0	0	0	1463	0	0	69,577	1886
9827	0	12965	0	0	0	1531	169	2000	0	0	0	0	585	0	0	26323	754
13257	0	10900	0	0	0	766	85	2500	0	0	0	0	293	0	0	27423	377
2070	0	1400	0	0	0	766	85	2000	0	0	0	0	293	0	0	6236	377
1380	0	4760	0	0	0	510	56	1500	0	0	0	0	195	0	0	8150	251
690	0	0	0	0	0	255	28	500	0	0	0	0	98	0	0	1445	126
33170	0	3060	0	3468	0	3572	85	2000	0	0	0	0	293	2670	0	49,740	4,708
4305	0	500	0	0	0	510	56	1000	0	0	0	0	195	0	0	6315	251
6840	0	500	0	0	0	255	28	0	0	0	0	0	98	0	0	7595	126
22025	0	1560	0	3468	0	2806	0	500	0	0	0	0	0	2670	0	34829	4330
0	0	500	0	0	0	0	0	500	0	0	0	0	0	0	0	1000	0
5530	0	2000	0	0	0	510	56	1000	0	0	0	0	195	0	0	9,040	251
3880	0	500	0	0	0	510	56	500	0	0	0	0	195	0	0	5390	251
0	0	1500	0	0	0	0	0	500	0	0	0	0	0	0	0	2000	0
1650	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1650	0
31860	0	53297	0	0	0	0	0	500	0	0	3106	0	0	0	3519	87,697	6,625
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
31860	0	53297	0	0	0	0	0	500	0	0	3106	0	0	0	3519	87697	6625

Table 5. Continued

RETAIL CATEGORIES	SQUARE FOOTAGE OF RETAIL SPACE (Source: UNO Business Survey Jan. 2009 & approximate measurements using Google Earth)															
	Clematis Corridor		Elysian Fields & Filmore		Elysian Fields & Robert E Lee		Franklin & Leon C Simon		Franklin & Robert E Lee		Franklin & Filmore		Franklin & Jasmine		Franklin & I-610	
	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied
CONVENIENCE GOODS SUBTOTAL	7048	6459	10350	5792	28199	2250	79240	0	7291	0	9360	0	2325	0	1922	0
<i>FOOD AT HOME (including liquor)</i>	2442	0	0	0	14100	0	70000	0	2800	0	3234	0	0	0	0	0
<i>FOOD AWAY FROM HOME</i>	4606	3168	5400	5792	11421	2250	5460	0	0	0	6126	0	2325	0	0	0
<i>DRUG</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	0	3291	4950	0	0	0	3780	0	0	0	0	0	0	0	0	0
<i>AUTO (Gas, Wash & Other)</i>	0	0	0	0	2678	0	0	0	4491	0	0	0	0	0	1922	0
GENERAL VACANT	0	0	0	4350	0	8910	0	19700	0	8280	0	8164	0	3380	0	0
<i>MULTI-USE VACANT SPACE</i>	0	0	0	4350	0	8910	0	19700	0	8280	0	8164	0	3380	0	0
<i>STRIP MALL SPACE</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL CONVENIENCE & COMPARISON																
OTHER																
<i>BANKS & PROFESSIONAL SERVICES</i>	0	2476	0	1104	31981	0	1680	0	2782	0	9710	0	6943	0	3000	0
<i>HOTELS / MOTELS</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<i>STORAGE & WAREHOUSE</i>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: UNO field survey January 2009

Table continued on opposite page

Gentilly & Elysian Fields		Gentilly Woods		Mirabeau & St Anthony		Paris & Gentilly		Paris & Mirabeau		Paris & Robert E. Lee		St. Bernard & Foy		St. Roch and Prentiss		TOTAL	
Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied	Occupied	Un-occupied
80092	15450	130967	8886	4404	0	26898	5108	10250	0	0	0	8920	11975	0	1273	407,266	57,193
0	0	57742	0	0	0	2365	3939	1500	0	0	0	4800	7775	0	0	158983	11714
15037	8200	31193	7266	4404	0	5281	1169	1750	0	0	0	1200	4200	0	1273	94203	33318
24400	0	15400	0	0	0	0	0	0	0	0	0	0	0	0	0	39800	0
37805	7250	10532	1620	0	0	12235	0	7000	0	0	0	920	0	0	0	77222	12161
2850	0	16100	0	0	0	7017	0	0	0	0	0	2000	0	0	0	37058	0
0	105413	0	247050	0	0	0	0	0	45000	0	0	0	8200	0	10443	0	468,890
0	105413	0	65830	0	0	0	0	0	45000	0	0	0	8200	0	10443	0	287670
0	0	0	181220	0	0	0	0	0	0	0	0	0	0	0	0	0	181220
																623,320	539,552
																442,091	147,183
49112	2900	13582	63445	0	0	1301		0	15000	0	3642	0	0	0	0	120091	88567
0	0	50100	58616	0	0	0	0	0	0	0	0	0	0	0	0	50100	58616
0	0	271900	0	0	0	0	0	0	0	0	0	0	0	0	0	271900	0

Table 6. Sales Per Square Foot by Category

RETAIL CATEGORIES	Sales per Square Foot
COMPARISON GOODS Average	\$ 205.24
APPAREL & SERVICES	\$ 216.40
<i>MENS & BOYS CLOTHING</i>	\$ 227.38
<i>WOMEN AND GIRLS</i>	\$ 176.25
<i>CHILDREN'S CLOTHING</i>	\$ 236.02
<i>SHOES</i>	\$ 166.19
<i>OTHER APPAREL</i>	\$ 168.39
FURNITURE & HOME EQUIPMENT	\$ 217.56
<i>HOUSEHOLD TEXTILES</i>	\$ 163.49
<i>FURNITURE</i>	\$ 259.43
<i>HOME IMPROVEMENT (Floor Coverings, Materials & Hardware)</i>	\$ 314.85
<i>APPLIANCES (Small & Major)</i>	\$ 153.16
ENTERTAINMENT	\$ 194.88
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	\$ 294.15
<i>READING</i>	\$ 131.75
<i>OTHER</i>	\$ 158.73
AUTO-RELATED	\$ 886.04
<i>AUTO SALES*</i>	\$ 417.50
<i>AUTO REPAIR</i>	\$ 1,354.57
CONVENIENCE GOODS Average	\$ 345.77
<i>FOOD AT HOME (including liquor)</i>	\$ 270.60
<i>FOOD AWAY FROM HOME</i>	\$ 259.73
<i>DRUG</i>	\$ 513.07
<i>PERSONAL CARE PRODUCTS & SERVICES (Beauty, Other health, dry cleaners, laundry, optical goods-average)</i>	\$ 204.25
<i>AUTO (Gas, Wash & Other)*</i>	\$ 481.20

Source: adapted by UNO from ULI *Dollars and Cents*2006, and *estimates from local real estate listings

Table 7. Consumer Expenditures by Category

RETAIL CATEGORIES	Consumer Expenditure Shares									
Per Capita Income Ranges	All consumer units	less than \$3,125	\$3,125 to \$6,700	\$6,700 to \$8,800	\$8,800 to \$10,500	\$10,500 to \$13,700	\$13,700 to \$17,400	\$17,400 to \$20,800	\$20,800 to \$26,000	\$26,000 and more
Average Annual Retail Share (including auto expenses) as a percentage of income	36.28%	over 100%	95.89%	76.43%	67.57%	57.59%	47.71%	42.59%	41.90%	28.54%
Sub-Shares of Retail Share as a percentage of retail share										
COMPARISON GOODS SUBTOTAL	54.19%	46.04%	45.23%	46.85%	50.44%	49.61%	50.05%	47.58%	54.94%	57.58%
APPAREL & SERVICES	8.22%	11.72%	8.07%	8.04%	6.25%	7.09%	7.68%	7.99%	7.44%	8.79%
<i>MENS & BOYS CLOTHING</i>	1.90%	2.56%	2.28%	1.77%	1.21%	1.70%	1.59%	1.70%	1.74%	2.09%
<i>WOMEN AND GIRLS</i>	3.27%	4.33%	2.28%	3.20%	2.65%	2.69%	3.10%	3.08%	3.13%	3.49%
<i>CHILDREN'S CLOTHING</i>	0.41%	1.19%	0.79%	0.46%	0.30%	0.43%	0.48%	0.44%	0.36%	0.38%
<i>SHOES</i>	1.43%	2.62%	1.21%	1.58%	1.21%	1.35%	1.67%	1.57%	1.27%	1.41%
<i>OTHER APPAREL</i>	1.21%	1.03%	1.50%	1.03%	0.87%	0.91%	0.84%	1.20%	0.93%	1.43%
FURNITURE & HOME EQUIPMENT	10.64%	8.62%	14.25%	8.97%	8.17%	9.44%	8.78%	9.98%	10.10%	11.57%
<i>HOUSEHOLD TEXTILES</i>	0.58%	0.28%	0.45%	0.49%	0.54%	0.53%	0.50%	0.57%	0.59%	0.62%
<i>FURNITURE</i>	1.95%	1.73%	1.72%	1.19%	1.52%	1.35%	1.22%	1.55%	1.70%	2.39%
<i>HOME IMPROVEMENT</i>	6.66%	5.35%	10.02%	5.92%	4.75%	6.14%	5.76%	6.63%	6.51%	7.00%
<i>APPLIANCES (Small & Major)</i>	1.45%	1.25%	2.07%	1.37%	1.37%	1.41%	1.30%	1.23%	1.31%	1.56%
ENTERTAINMENT	6.98%	8.76%	6.91%	6.76%	7.13%	6.77%	6.65%	6.96%	6.60%	7.17%
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	4.31%	5.50%	5.69%	5.22%	4.79%	4.80%	4.61%	4.67%	4.26%	4.02%
<i>READING</i>	0.52%	0.53%	0.49%	0.63%	0.57%	0.50%	0.42%	0.51%	0.44%	0.55%
<i>OTHER</i>	2.15%	2.73%	0.72%	0.91%	1.77%	1.47%	1.62%	1.78%	1.90%	2.60%
AUTO RELATED	28.35%	16.94%	16.01%	23.08%	28.88%	26.32%	26.94%	22.65%	30.79%	30.05%
<i>Auto Sales</i>	14.17%	8.47%	8.00%	11.54%	14.44%	13.16%	13.47%	11.32%	15.40%	15.02%
<i>Auto Repair</i>	3.22%	2.76%	2.85%	2.68%	2.98%	3.24%	3.40%	3.63%	3.08%	3.25%
CONVENIENCE GOODS SUBTOTAL	45.81%	53.96%	54.77%	53.15%	49.56%	50.39%	49.95%	52.42%	45.06%	42.42%
<i>FOOD AT HOME (Including liquor)</i>	17.14%	21.91%	24.37%	23.38%	19.99%	20.26%	19.41%	19.98%	16.51%	15.09%
<i>FOOD AWAY FROM HOME</i>	11.66%	13.71%	9.40%	11.11%	9.16%	9.93%	10.44%	12.23%	10.99%	12.38%
<i>DRUG</i>	4.03%	5.63%	6.92%	5.86%	6.70%	5.94%	5.55%	5.24%	4.09%	2.90%
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	2.57%	2.22%	2.65%	2.62%	2.44%	2.44%	2.50%	2.66%	2.30%	2.68%
<i>AUTO (Gas, Wash & Other)</i>	10.42%	10.49%	11.44%	10.18%	11.27%	11.82%	12.06%	12.31%	11.18%	9.36%

Source: adapted by UNO from US Bureau of Labor Statistics, Consumer Expenditures Survey, Table 52, 2007.

Table 8: Entire Gentilly Area Retail Analysis

Summary Demographics:								
2008 Population Estimate: 26,337 (ESRI business analyst)		Project Area:			All Gentilly Neighborhoods			
Per Capita Income: \$ 18,127 (ESRI business analyst)								
Total Area Income: \$ 477,410,799								
Portion Spent on Retail 42.59%(BLS CE 2007)								
Total Retail Expenditure \$ 203,329,259								
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/ SURPLUS FACTOR
COMPARISON GOODS SUBTOTAL	\$ 96,746,410	20%	400	2%	\$ 29,928,682	\$ 44,343,307	\$14,414,625	1.48
APPAREL & SERVICES	\$ 16,254,768	15%	100	2%	\$ 2,882,588	\$ 15,056,463	\$12,173,875	5.22
<i>MENS & BOYS CLOTHING</i>	\$ 3,460,969	15%	50	2%	\$ 566,453	\$ 5,985,369	\$5,418,916	10.57
<i>WOMEN AND GIRLS</i>	\$ 6,268,319	15%	30	2%	\$ 991,657	\$ 4,833,233	\$3,841,577	4.87
<i>CHILDREN'S CLOTHING</i>	\$ 900,066	15%	10	2%	\$ 137,471	\$ 1,471,726	\$1,334,256	10.71
<i>SHOES</i>	\$ 3,182,377	15%	10	2%	\$ 486,057	\$ 1,354,515	\$868,458	2.79
<i>OTHER APPAREL</i>	\$ 2,443,037	15%	10	2%	\$ 373,134	\$ 243,357	\$129,777	0.65
FURNITURE & HOME EQUIPMENT	\$ 20,294,352	30%	275	2%	\$ 7,614,023	\$ 10,821,347	\$3,207,325	1.42
<i>HOUSEHOLD TEXTILES</i>	\$ 1,157,228	30%	75	2%	\$ 370,896	\$ 1,032,505	\$661,609	2.78
<i>FURNITURE</i>	\$ 3,150,232	30%	25	2%	\$ 966,600	\$ 1,970,423	\$1,003,823	2.04
<i>HOME IMPROVEMENT</i>	\$ 13,490,279	40%	150	2%	\$ 5,949,307	\$ 10,965,911	\$5,016,604	1.84
<i>APPLIANCES (Small & Major)</i>	\$ 2,496,612	30%	25	2%	\$ 766,047	\$ 153,160	\$612,887	0.20
ENTERTAINMENT	\$ 14,143,899	30%	10	2%	\$ 4,281,836	\$ 1,761,763	\$2,520,073	0.41
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	\$ 9,493,556	30%	20	2%	\$ 2,899,974	\$ 1,585,586	\$1,314,388	0.55
<i>READING</i>	\$ 1,028,647	30%	20	2%	\$ 314,218	\$ 263,500	\$50,718	0.84
<i>OTHER</i>	\$ 3,621,695	30%	20	2%	\$ 1,106,311	\$ 261,905	\$844,406	0.24
AUTO-RELATED	\$ 46,053,391	30%	15	2%	\$ 14,004,868	\$ 77,702,611	\$63,697,743	5.55
<i>AUTO SALES*</i>	\$ 23,026,696	30%	0	2%	\$ 6,908,009	\$ -	\$6,908,009	0.00
<i>AUTO REPAIR</i>	\$ 7,371,971	30%	15	2%	\$ 2,241,822	\$ 118,791,725	\$116,549,904	52.99
CONVENIENCE GOODS SUBTOTAL	\$ 106,582,849	70%	500	5%	\$ 111,029,973	\$ 140,820,365	\$29,790,392	1.27
<i>FOOD AT HOME (Including liquor)</i>	\$ 40,620,849	70%	100	5%	\$ 31,210,822	\$ 43,020,800	\$11,809,977	1.38
<i>FOOD AWAY FROM HOME</i>	\$ 24,869,689	70%	75	5%	\$ 18,683,570	\$ 24,467,345	\$5,783,776	1.31
<i>DRUG</i>	\$ 10,661,499	70%	100	5%	\$ 8,191,709	\$ 20,420,186	\$12,228,477	2.49
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	\$ 5,411,113	70%	25	5%	\$ 3,880,234	\$ 15,772,594	\$11,892,359	4.06
<i>AUTO (Gas, Wash & Other)</i>	\$ 25,019,700	70%	200	5%	\$ 20,933,728	\$ 17,832,310	\$3,101,419	0.85

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the study area

Table 9: Comparison Shopping Scenarios: Entire Gentilly Area

		Inflow Consumers (with a 2% draw rate)								
		100	200	300	400	500	600	700	800	900
Retention Rates	10%	\$ 12,319,491	\$ 14,984,341	\$ 17,649,191	\$ 20,314,041	\$ 22,978,891	\$ 25,643,741	\$ 28,308,591	\$ 30,973,441	\$ 33,638,291
	20%	\$ 21,994,132	\$ 24,658,982	\$ 27,323,832	\$ 29,988,682	\$ 32,653,532	\$ 35,318,382	\$ 37,983,232	\$ 40,648,082	\$ 43,312,932
	30%	\$ 31,668,773	\$ 34,333,623	\$ 36,998,473	\$ 39,663,323	\$ 42,328,173	\$ 44,993,023	\$ 47,657,873	\$ 50,322,723	\$ 52,987,573
	40%	\$ 41,343,414	\$ 44,008,264	\$ 46,673,114	\$ 49,337,964	\$ 52,002,814	\$ 54,667,664	\$ 57,332,514	\$ 59,997,364	\$ 62,662,214
	50%	\$ 51,018,055	\$ 53,682,905	\$ 56,347,755	\$ 59,012,605	\$ 61,677,455	\$ 64,342,305	\$ 67,007,155	\$ 69,672,005	\$ 72,336,855
	60%	\$ 60,692,696	\$ 63,357,546	\$ 66,022,396	\$ 68,687,246	\$ 71,352,096	\$ 74,016,946	\$ 76,681,796	\$ 79,346,646	\$ 82,011,496
	70%	\$ 70,367,337	\$ 73,032,187	\$ 75,697,037	\$ 78,361,887	\$ 81,026,737	\$ 83,691,587	\$ 86,356,437	\$ 89,021,287	\$ 91,686,137
	80%	\$ 80,041,978	\$ 82,706,828	\$ 85,371,678	\$ 88,036,528	\$ 90,701,378	\$ 93,366,228	\$ 96,031,078	\$ 98,695,928	\$ 101,360,778

Note: **Bold Green** amounts indicate that demand exceeds supply

Table 10: Convenience Shopping Scenarios: Entire Gentilly Area

		Inflow Consumers (with a 5% draw rate)								
		100	200	300	400	500	600	700	800	900
Retention Rates	30%	\$ 39,259,250	\$ 46,543,646	\$ 53,828,042	\$ 61,112,438	\$ 68,396,834	\$ 75,681,230	\$ 82,965,626	\$ 90,250,022	\$ 97,534,418
	40%	\$ 49,917,535	\$ 57,201,931	\$ 64,486,327	\$ 71,770,723	\$ 79,055,119	\$ 86,339,515	\$ 93,623,911	\$ 100,908,307	\$ 108,192,703
	50%	\$ 60,575,820	\$ 67,860,216	\$ 75,144,612	\$ 82,429,008	\$ 89,713,404	\$ 96,997,800	\$ 104,282,196	\$ 111,566,592	\$ 118,850,988
	60%	\$ 71,234,105	\$ 78,518,501	\$ 85,802,897	\$ 93,087,293	\$ 100,371,689	\$ 107,656,085	\$ 114,940,481	\$ 122,224,877	\$ 129,509,273
	70%	\$ 81,892,390	\$ 89,176,786	\$ 96,461,182	\$ 103,745,578	\$ 111,029,974	\$ 118,314,370	\$ 125,598,766	\$ 132,883,162	\$ 140,167,558
	80%	\$ 92,550,675	\$ 99,835,071	\$ 107,119,467	\$ 114,403,863	\$ 121,688,259	\$ 128,972,655	\$ 136,257,051	\$ 143,541,447	\$ 150,825,843

Note: **Bold Green** amounts indicate that demand exceeds supply

Table 11. Retail Share Retention Scenarios

	Per Capita Expenditures	Area-Wide Expenditures	10% Retention	20% Retention	30% Retention
Consumer Expenditures for Goods and Services	\$7,720	\$203,329,259	\$20,332,926	\$40,665,852	\$60,998,778
COMPARISON	\$3,673	\$96,746,410	\$9,674,641	\$19,349,282	\$29,023,923
<i>Apparel and Services</i>	\$617	\$16,254,768	\$1,625,477	\$3,250,954	\$4,876,431
<i>Household Furn. & Equip.</i>	\$771	\$20,294,352	\$2,029,435	\$4,058,870	\$6,088,305
<i>Entertainment</i>	\$537	\$14,143,899	\$1,414,390	\$ 2,828,780	\$ 4,243,170
<i>Other</i>	\$1,749	\$46,053,391	\$4,605,339	\$9,210,678	\$13,816,017
CONVENIENCE	\$4,047	\$106,582,849	\$10,658,285	\$21,316,570	\$31,974,855
<i>Food Away from Home</i>	\$1,542	\$40,620,849	\$4,062,085	\$8,124,170	\$12,186,255
<i>Food at Home</i>	\$944	\$24,869,689	\$2,486,969	\$4,973,938	\$7,460,907
<i>Drug</i>	\$405	\$10,661,499	\$1,066,150	\$2,132,300	\$3,198,450
<i>Personal Care Prod. & Service</i>	\$205	\$5,411,113	\$541,111	\$1,082,223	\$1,623,334
<i>Auto-Related</i>	\$950	\$25,019,700	\$2,501,970	\$5,003,940	\$7,505,910

Note: Inflow is considered nil; **Bold Green** amounts indicate that demand exceeds supply

In Table 8, retention and inflow rates are estimations used to reasonably reflect the actual situation. In lieu of an actual consumer preference survey in Gentilly, the reasonableness of retention and inflow can only be assumed. Consequently, the scenario tables (Tables 9 & 10) are provided which show the potential variability of retention, inflow and the resultant sales. Similar tables are provided for the individual retail areas as well.

Table 11 shows the breakdown of expenditures per capita for each of the retail sub-categories, such as *Entertainment* or *Food at Home*, and those same expenditures for the entire population of the project area. The potential sales given a retention of 10, 20 or 30 percent of those expenditures is also shown per category.

Table 12. Consumer Composition Scenarios for the Entire Gentilly Area

Residents	LOW RETENTION (10%)	MODERATE RETENTION (25%)	HIGH RETENTION (50%)
COMPARISON SHOPPING	47,138	117,844	235,689
APPAREL & SERVICES	7,511	18,779	37,557
FURNITURE & HOME EQUIPMENT	9,328	23,320	46,641
ENTERTAINMENT	7,258	18,145	36,289
AUTO-RELATED	5,198	12,994	25,988
CONVENIENCE SHOPPING	30,825	77,062	154,124
<i>FOOD AT HOME (Including liquor)</i>	15,011	37,529	75,057
<i>FOOD AWAY FROM HOME</i>	9,575	23,938	47,876
<i>DRUG</i>	2,078	5,195	10,390
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	2,649	6,623	13,246
<i>AUTO (Gas, Wash & Other)</i>	5,199	12,999	25,997
TOTAL	77,963	194,906	389,813
Students	LOW DRAW (2%)	MODERATE DRAW (5%)	HIGH DRAW (10%)
COMPARISON SHOPPING	6,184	15,729	30,920
APPAREL & SERVICES	985	2,506	4,927
FURNITURE & HOME EQUIPMENT	1,224	3,113	6,119
ENTERTAINMENT	952	2,422	4,761
AUTO-RELATED	682	1,734	3,409
CONVENIENCE SHOPPING	4,044	10,285	20,220
<i>FOOD AT HOME (Including liquor)</i>	1,969	5,009	9,847
<i>FOOD AWAY FROM HOME</i>	1,256	3,195	6,281
<i>DRUG</i>	273	693	1,363
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	348	884	1,738
<i>AUTO (Gas, Wash & Other)</i>	682	1,735	3,411
TOTAL	10,228	26,014	51,140
Employees	LOW DRAW (2%)	MODERATE DRAW (5%)	HIGH DRAW (10%)
COMPARISON SHOPPING	2,000	4,999	9,998
APPAREL & SERVICES	319	797	1,593
FURNITURE & HOME EQUIPMENT	396	989	1,978
ENTERTAINMENT	308	770	1,539
AUTO-RELATED	220	551	1,102
CONVENIENCE SHOPPING	1,308	3,269	6,538
<i>FOOD AT HOME (Including liquor)</i>	637	1,592	3,184
<i>FOOD AWAY FROM HOME</i>	406	1,015	2,031
<i>DRUG</i>	88	220	441
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	112	281	562
<i>AUTO (Gas, Wash & Other)</i>	221	551	1,103
TOTAL	3,307	8,268	16,536

Supportable Square Footage Totals (Residents + Students + Employees)	LOW	MID	HIGH
COMPARISON SHOPPING	55,321	138,572	276,607
APPAREL & SERVICES	8,816	22,082	44,078
FURNITURE & HOME EQUIPMENT	10,948	27,422	54,738
ENTERTAINMENT	8,518	21,336	42,590
AUTO-RELATED	6,100	15,280	30,500
CONVENIENCE SHOPPING	36,176	90,616	180,882
FOOD AT HOME (Including liquor)	17,618	44,129	88,088
FOOD AWAY FROM HOME	11,238	28,148	56,188
DRUG	2,439	6,109	12,194
PERSONAL CARE PRODUCTS & SERVICES	3,109	7,788	15,546
AUTO (Gas, Wash & Other)	6,102	15,285	30,511
TOTAL	91,498	229,188	457,489

Notes:

Students and Employees are assumed to have the same income and consumer behavior as project area residents

Consideration is not given to the differences in spending between any groups of students (say, graduate vs. undergraduate), nor is the student population broken into commuters vs. noncommuters. Therefore, some students reside within the project area already and should be counted as project area residents.

Supportable Square Footage is defined as the demand potential expenditures divided by the sales per square foot to produce a "demanded" square footage number. We should note here that because sales per square foot data comes from national data on various shopping centers' sales per square foot, the above numbers likely undercut in demand square footage considerably. Why? Some stores have very low overhead and are smaller than the average national chain. These stores would be much more profitable per square foot and would increase the demand figure.



Table 13: Entire Gentilly Project Area Demographics

Summary	2000	2008	2013
Population	51,476	26,337	29,501
Households	19,644	9,482	10,715
Families	13,369	6,577	7,292
Average Household Size	2.56	2.65	2.64
Owner Occupied HUs	12,864	6,593	7,192
Renter Occupied HUs	6,780	2,889	3,523
Median Age	35.9	37.4	38.0

Trends: 2008-2013 Annual Rate	Area	State	National
Population	2.29%	0.95%	1.23%
Households	2.48%	1.08%	1.26%
Families	2.09%	0.92%	1.05%
Owner HHs	1.75%	0.89%	1.07%
Median Household Income	1.82%	1.87%	3.19%

Households by Income	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	4,913	25.0%	1,731	18.3%	1,786	16.7%
\$15,000 - \$24,999	2,946	15.0%	1,234	13.0%	1,282	12.0%
\$25,000 - \$34,999	2,702	13.8%	1,311	13.8%	1,248	11.6%
\$35,000 - \$49,999	3,273	16.7%	1,658	17.5%	1,864	17.4%
\$50,000 - \$74,999	3,070	15.6%	1,931	20.4%	2,426	22.6%
\$75,000 - \$99,999	1,372	7.0%	829	8.7%	1,031	9.6%
\$100,000 - \$149,999	862	4.4%	543	5.7%	760	7.1%
\$150,000 - \$199,999	251	1.3%	143	1.5%	187	1.7%
\$200,000+	236	1.2%	99	1.0%	130	1.2%
Median Household Income	\$31,915		\$38,921		\$42,605	
Average Household Income	\$42,869		\$48,797		\$52,457	
Per Capita Income	\$16,518		\$18,127		\$19,617	

Table 13: continued....

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	3,376	6.6%	1,552	5.9%	1,810	6.1%
5 - 9	3,899	7.6%	1,577	6.0%	1,791	6.1%
10 - 14	3,753	7.3%	1,688	6.4%	1,778	6.0%
15 - 19	4,190	8.1%	2,384	9.1%	2,551	8.6%
20 - 24	3,692	7.2%	2,151	8.2%	2,449	8.3%
25 - 34	6,225	12.1%	3,118	11.8%	3,430	11.6%
35 - 44	7,216	14.0%	3,069	11.7%	3,278	11.1%
45 - 54	7,004	13.6%	3,746	14.2%	3,995	13.5%
55 - 64	4,368	8.5%	3,044	11.6%	3,967	13.4%
65 - 74	3,840	7.5%	1,875	7.1%	2,241	7.6%
75 - 84	3,078	6.0%	1,493	5.7%	1,442	4.9%
85+	833	1.6%	639	2.4%	771	2.6%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	11,761	22.8%	5,447	20.7%	6,317	21.4%
Black Alone	37,748	73.3%	19,796	75.2%	21,944	74.4%
American Indian Alone	80	0.2%	37	0.1%	44	0.1%
Asian Alone	644	1.3%	406	1.5%	442	1.5%
Pacific Islander Alone	13	0.0%	7	0.0%	8	0.0%
Some Other Race Alone	496	1.0%	246	0.9%	283	1.0%
Two or More Races	734	1.4%	398	1.5%	462	1.6%
Hispanic Origin (Any Race)	1,521	3.0%	945	3.6%	1,119	3.8%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 14: Clematis & Clover Retail Analysis

Summary Demographics:								
2008 Population Estimate:		1,723	(ESRI business analyst)		Study Area:			
Per Capita Income: \$		15,286	(ESRI business analyst)		Pedestrian Population with 1/4 mile			
Total Area Income: \$		26,337,778						
Portion Spent on Retail		47.71% (BLS CE 2007)						
Total Retail Expenditure \$		12,565,754						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 6,276,814	15%	50	2%	\$ 2,252,986	\$ 2,436,987	\$184,001	1.08
<i>FOOD AT HOME</i>	\$ 2,438,878	15%	25	2%	\$ 620,619	\$ 660,805	\$40,186	1.06
<i>FOOD AWAY FROM HOME</i>	\$ 1,311,901	15%	25	2%	\$ 333,838	\$ 1,196,316	\$862,478	3.58

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 15: Convenience Shopping Scenarios: Clematis & Clover

Retention Rates	Inflow Consumers (with a 2% draw rate)			
	20	40	60	80
10%	\$ 1,152,267	\$ 1,676,853	\$ 2,201,439	\$ 2,726,024
20%	\$ 1,779,948	\$ 2,304,534	\$ 2,829,120	\$ 3,353,706
30%	\$ 2,407,629	\$ 2,932,215	\$ 3,456,801	\$ 3,981,388
40%	\$ 3,035,310	\$ 3,559,896	\$ 4,084,482	\$ 4,609,070

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 16: Clematis & Clover Demographics

New Orleans, LA 70122		Site Type: Radius		Radius: 0.25 mile	
Summary		2000		2008	2013
Population		2,343		1,723	1,630
Households		893		616	587
Families		589		419	390
Average Household Size		2.62		2.80	2.78
Owner Occupied HUs		575		409	375
Renter Occupied HUs		318		207	212
Median Age		36.1		37.6	38.5
Trends: 2008-2013 Annual Rate		Area		State	National
Population		-1.10%		0.95%	1.23%
Households		-0.96%		1.08%	1.26%
Families		-1.42%		0.92%	1.05%
Owner HHs		-1.72%		0.89%	1.07%
Median Household Income		2.25%		1.87%	3.19%
		2000		2008	2013
Households by Income		Number	Percent	Number	Percent
< \$15,000		223	25.3%	127	20.6%
\$15,000 - \$24,999		107	12.1%	64	10.4%
\$25,000 - \$34,999		190	21.5%	121	19.6%
\$35,000 - \$49,999		153	17.3%	121	19.6%
\$50,000 - \$74,999		138	15.6%	118	19.2%
\$75,000 - \$99,999		25	2.8%	36	5.8%
\$100,000 - \$149,999		37	4.2%	22	3.6%
\$150,000 - \$199,999		1	0.1%	5	0.8%
\$200,000+		8	0.9%	2	0.3%
Median Household Income		\$29,687		\$34,682	\$38,754
Average Household Income		\$37,170		\$41,631	\$45,914
Per Capita Income		\$14,112		\$15,286	\$17,022

Table 16. Continued....

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	146	6.2%	109	6.3%	101	6.2%
5 - 9	175	7.5%	112	6.5%	109	6.7%
10 - 14	184	7.9%	126	7.3%	110	6.8%
15 - 19	200	8.5%	124	7.2%	117	7.2%
20 - 24	143	6.1%	111	6.4%	105	6.4%
25 - 34	281	12.0%	226	13.1%	205	12.6%
35 - 44	372	15.9%	215	12.5%	198	12.2%
45 - 54	351	15.0%	271	15.7%	238	14.6%
55 - 64	205	8.7%	217	12.6%	238	14.6%
65 - 74	126	5.4%	113	6.6%	120	7.4%
75 - 84	118	5.0%	64	3.7%	55	3.4%
85+	42	1.8%	36	2.1%	33	2.0%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	398	17.0%	212	12.3%	226	13.9%
Black Alone	1,894	80.8%	1,476	85.7%	1,368	84.0%
American Indian Alone	4	0.2%	3	0.2%	3	0.2%
Asian Alone	5	0.2%	4	0.2%	4	0.2%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	22	0.9%	14	0.8%	14	0.9%
Two or More Races	20	0.9%	14	0.8%	14	0.9%
Hispanic Origin (Any Race)	44	1.9%	37	2.1%	39	2.4%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 17: Elysian Fields & Filmore Retail Analysis

Summary Demographics:									
2008 Population Estimate:		588 (ESRI business analyst)				Study Area:			
Per Capita Income: \$		17,866 (ESRI business analyst)				Pedestrian Population within 1/4 mile			
Total Area Income: \$		10,505,208							
Portion Spent on Retail		42.59% (BLS CE 2007)							
Total Retail Expenditure \$		4,474,168							
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/ SURPLUS FACTOR	
OTHER									
<i>HOME IMPROVEMENT</i>	\$ 296,847	20%	140	2%	\$ 568,251	\$ 566,730	\$1,521	1.00	
CONVENIENCE GOODS SUBTOTAL	\$ 2,345,307	20%	50	2%	\$ 1,904,964	\$ 1,642,856	\$262,108	0.86	
<i>FOOD AWAY FROM HOME</i>	\$ 547,246	20%	50	2%	\$ 444,498	\$ 4,784,589	\$4,340,091	10.76	
<i>AUTO (Gas, Wash & Other)</i>	\$ 550,547	20%	50	2%	\$ 447,179	\$ 6,705,122	\$6,257,942	14.99	

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 18: Convenience Shopping Scenarios: Elysian Fields & Filmore

		Inflow Consumers (with a 2% draw rate)				
		10	20	30	40	50
Retention Rates	10%	\$ 521,711	\$ 808,892	\$ 1,096,073	\$ 1,383,254	\$ 1,670,435
	20%	\$ 756,242	\$ 1,043,422	\$ 1,330,602	\$ 1,617,782	\$ 1,904,962
	30%	\$ 990,773	\$ 1,277,952	\$ 1,565,131	\$ 1,852,310	\$ 2,139,489
	40%	\$ 1,225,304	\$ 1,512,482	\$ 1,799,660	\$ 2,086,838	\$ 2,374,016
	50%	\$ 1,459,835	\$ 1,747,012	\$ 2,034,189	\$ 2,321,366	\$ 2,608,543
	60%	\$ 1,694,366	\$ 1,981,542	\$ 2,268,718	\$ 2,555,894	\$ 2,843,070

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 19: Elysian Fields Ave & Filmore Ave Demographics

New Orleans, LA 70122		Site Type: Radius		Radius:	0.25 mile	
Summary		2000	2008		2013	
Population		1,426	588		737	
Households		586	232		292	
Families		387	157		193	
Average Household Size		2.43	2.53		2.52	
Owner Occupied HUs		387	163		198	
Renter Occupied HUs		199	69		94	
Median Age		36.1	36.8		36.4	
Trends: 2008-2013 Annual Rate		Area	State		National	
Population		4.62%	0.95%		1.23%	
Households		4.71%	1.08%		1.26%	
Families		4.22%	0.92%		1.05%	
Owner HHs		3.97%	0.89%		1.07%	
Median Household Income		1.95%	1.87%		3.19%	
		2000	2008		2013	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< \$15,000	132	21.5%	38	16.5%	44	15.0%
\$15,000 - \$24,999	107	17.4%	33	14.3%	35	11.9%
\$25,000 - \$34,999	88	14.3%	33	14.3%	36	12.3%
\$35,000 - \$49,999	123	20.0%	47	20.3%	61	20.8%
\$50,000 - \$74,999	93	15.1%	45	19.5%	63	21.5%
\$75,000 - \$99,999	50	8.1%	21	9.1%	29	9.9%
\$100,000 - \$149,999	16	2.6%	13	5.6%	21	7.2%
\$150,000 - \$199,999	2	0.3%	1	0.4%	3	1.0%
\$200,000+	3	0.5%	0	0.0%	1	0.3%
Median Household Income	\$32,491		\$38,454		\$42,345	
Average Household Income	\$41,634		\$46,092		\$49,881	
Per Capita Income	\$18,088		\$17,866		\$19,579	

Table 19. Continued....

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	95	6.7%	39	6.6%	51	6.9%
5 - 9	108	7.6%	38	6.5%	47	6.4%
10 - 14	105	7.4%	40	6.8%	47	6.4%
15 - 19	107	7.5%	42	7.1%	48	6.5%
20 - 24	73	5.1%	45	7.6%	56	7.6%
25 - 34	198	13.9%	77	13.1%	108	14.7%
35 - 44	243	17.0%	82	13.9%	88	11.9%
45 - 54	191	13.4%	95	16.1%	112	15.2%
55 - 64	112	7.9%	64	10.9%	95	12.9%
65 - 74	79	5.5%	31	5.3%	45	6.1%
75 - 84	87	6.1%	21	3.6%	24	3.3%
85+	28	2.0%	15	2.5%	16	2.2%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	401	28.1%	138	23.4%	185	25.1%
Black Alone	970	68.0%	429	72.8%	523	71.1%
American Indian Alone	2	0.1%	1	0.2%	1	0.1%
Asian Alone	5	0.4%	2	0.3%	2	0.3%
Pacific Islander Alone	1	0.1%	0	0.0%	0	0.0%
Some Other Race Alone	26	1.8%	10	1.7%	13	1.8%
Two or More Races	22	1.5%	9	1.5%	12	1.6%
Hispanic Origin (Any Race)	76	5.3%	40	6.8%	50	6.8%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 20: Elysian Fields & Robert E. Lee Retail Analysis

Summary Demographics:								
2008 Population Estimate:		534 (ESRI business analyst)		Study Area:				
Per Capita Income: \$		18,175 (ESRI business analyst)		Pedestrian Population within 1/4 mile				
Total Area Income: \$		9,705,450						
Portion Spent on Retail		42.59% (BLS CE 2007)						
Total Retail Expenditure \$		4,133,551						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 2,166,760	20%	300	2%	\$ 9,197,773	\$ 9,750,368	\$552,595	1.06
<i>FOOD AT HOME (Including liquor)</i>	\$ 825,795	20%	100	2%	\$ 1,278,591	\$ 3,815,460	\$2,536,869	2.98
<i>FOOD AWAY FROM HOME</i>	\$ 505,585	20%	100	2%	\$ 782,804	\$ 2,966,376	\$2,183,572	3.79
<i>AUTO (Gas, Wash & Other)</i>	\$ 508,634	20%	100	2%	\$ 787,526	\$ 1,288,654	\$501,128	1.64

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 21: Convenience Shopping Scenarios: Elysian Fields & R. E. Lee

		Inflow Consumers (with a 2% draw rate)			
		100	200	300	400
Retention Rates	10%	\$ 3,138,150	\$ 6,059,624	\$ 8,981,098	\$ 11,902,571
	20%	\$ 3,354,826	\$ 6,276,300	\$ 9,197,773	\$ 12,119,247
	30%	\$ 3,571,502	\$ 6,492,976	\$ 9,414,449	\$ 12,335,923
	40%	\$ 3,788,178	\$ 6,709,652	\$ 9,631,125	\$ 12,552,599
	50%	\$ 4,004,854	\$ 6,926,328	\$ 9,847,801	\$ 12,769,275

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 22: Elysian Fields Ave & Robert E Lee Blvd Demographics

New Orleans, LA 70122		Site Type: Radius		Radius:	0.25 mile		ESRI	
Summary		2000			2008			2013
	Population	1,244			534			637
	Households	576			237			285
	Families	324			138			161
	Average Household Size	2.16			2.25			2.24
	Owner Occupied HUs	343			147			164
	Renter Occupied HUs	233			90			121
	Median Age	36.4			37.7			39.1
Trends: 2008-2013 Annual Rate		Area			State			National
	Population	3.59%			0.95%			1.23%
	Households	3.76%			1.08%			1.26%
	Families	3.13%			0.92%			1.05%
	Owner HHs	2.21%			0.89%			1.07%
	Median Household Income	1.57%			1.87%			3.19%
		2000			2008			2013
Households by Income	Number	Percent		Number	Percent		Number	Percent
	< \$15,000	149	25.2%	48	20.4%		54	19.0%
	\$15,000 - \$24,999	108	18.3%	38	16.2%		41	14.4%
	\$25,000 - \$34,999	70	11.8%	29	12.3%		33	11.6%
	\$35,000 - \$49,999	108	18.3%	43	18.3%		50	17.6%
	\$50,000 - \$74,999	93	15.7%	47	20.0%		64	22.5%
	\$75,000 - \$99,999	40	6.8%	19	8.1%		24	8.5%
	\$100,000 - \$149,999	16	2.7%	9	3.8%		15	5.3%
	\$150,000 - \$199,999	0	0.0%	1	0.4%		2	0.7%
	\$200,000+	7	1.2%	1	0.4%		1	0.4%
	Median Household Income	\$31,031		\$35,869			\$38,774	
	Average Household Income	\$39,053		\$43,044			\$45,543	
	Per Capita Income	\$17,578		\$18,175			\$19,469	

Table 22. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	76	6.1%	32	6.0%	38	5.9%
5 - 9	80	6.4%	27	5.1%	32	5.0%
10 - 14	75	6.0%	29	5.4%	31	4.8%
15 - 19	79	6.4%	33	6.2%	35	5.5%
20 - 24	98	7.9%	39	7.3%	51	8.0%
25 - 34	182	14.7%	87	16.3%	97	15.2%
35 - 44	200	16.1%	75	14.1%	87	13.6%
45 - 54	160	12.9%	86	16.1%	99	15.5%
55 - 64	93	7.5%	57	10.7%	86	13.4%
65 - 74	84	6.8%	30	5.6%	40	6.3%
75 - 84	93	7.5%	25	4.7%	27	4.2%
85+	21	1.7%	13	2.4%	17	2.7%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	492	39.5%	174	32.6%	223	35.0%
Black Alone	647	52.0%	311	58.2%	356	55.9%
American Indian Alone	5	0.4%	2	0.4%	3	0.5%
Asian Alone	53	4.3%	27	5.1%	32	5.0%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	15	1.2%	6	1.1%	6	0.9%
Two or More Races	33	2.7%	14	2.6%	17	2.7%
Hispanic Origin (Any Race)	83	6.7%	43	8.1%	55	8.6%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 23: Franklin & Filmore Retail Analysis

Summary Demographics:								
2008 Population Estimate:		682	(ESRI business analyst)		Project Area:			
Per Capita Income: \$		18,350	(ESRI business analyst)		Pedestrian Population with 1/4 mile			
Total Area Income: \$		12,514,700						
Portion Spent on Retail		42.59% (BLS CE 2007)						
Total Retail Expenditure \$		5,330,011						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 2,793,930	15%	40	2%	\$ 1,598,931	\$ 3,236,407	\$1,637,476	2.02
<i>FOOD AT HOME (Including liquor)</i>	\$ 1,064,822	15%	40	2%	\$ 609,384	\$ 875,120	\$265,736	1.44
<i>FOOD AWAY FROM HOME</i>	\$ 651,926	15%	40	2%	\$ 373,089	\$ 1,591,106	\$1,218,017	4.26

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 24: Convenience Shopping Scenarios: Franklin & Filmore

Retention Rates	Inflow Consumers (with a 2% draw rate)			
	20	40	60	80
10%	\$ 869,314	\$ 1,459,234	\$ 2,049,155	\$ 2,639,076
20%	\$ 1,148,707	\$ 1,738,627	\$ 2,328,548	\$ 2,918,469
30%	\$ 1,428,100	\$ 2,018,020	\$ 2,607,941	\$ 3,197,862
40%	\$ 1,707,493	\$ 2,297,413	\$ 2,887,334	\$ 3,477,255

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 25. Franklin Ave & Filmore Ave Demographics

New Orleans, LA 70122		Site Type: Radius		Radius:	0.25 mile	ESRI	
Summary		2000		2008		2013	
	Population	1,334		682		768	
	Households	536		261		298	
	Families	371		185		206	
	Average Household Size	2.49		2.61		2.58	
	Owner Occupied HUs	404		198		224	
	Renter Occupied HUs	132		63		74	
	Median Age	37.3		39.7		41.5	
Trends: 2008-2013 Annual Rate		Area		State		National	
	Population	2.40%		0.95%		1.23%	
	Households	2.69%		1.08%		1.26%	
	Families	2.17%		0.92%		1.05%	
	Owner HHs	2.50%		0.89%		1.07%	
	Median Household Income	2.25%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number		Percent	Number	Percent	Number	Percent
	< \$15,000	105	20.4%	41	15.6%	40	13.4%
	\$15,000 - \$24,999	65	12.6%	34	13.0%	32	10.7%
	\$25,000 - \$34,999	80	15.6%	28	10.7%	25	8.4%
	\$35,000 - \$49,999	133	25.9%	70	26.7%	73	24.5%
	\$50,000 - \$74,999	69	13.4%	52	19.8%	78	26.2%
	\$75,000 - \$99,999	31	6.0%	18	6.9%	24	8.1%
	\$100,000 - \$149,999	20	3.9%	14	5.3%	19	6.4%
	\$150,000 - \$199,999	5	1.0%	2	0.8%	4	1.3%
	\$200,000+	6	1.2%	3	1.1%	3	1.0%
	Median Household Income	\$35,397		\$41,261		\$46,114	
	Average Household Income	\$46,055		\$48,671		\$53,776	
	Per Capita Income	\$17,731		\$18,350		\$20,453	

Table 25. Continued

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	83	6.2%	39	5.7%	44	5.7%
5 - 9	96	7.2%	41	6.0%	45	5.8%
10 - 14	103	7.7%	48	7.0%	47	6.1%
15 - 19	106	7.9%	50	7.3%	53	6.9%
20 - 24	57	4.3%	45	6.6%	50	6.5%
25 - 34	172	12.9%	76	11.2%	94	12.2%
35 - 44	235	17.6%	97	14.2%	88	11.4%
45 - 54	196	14.7%	119	17.5%	130	16.8%
55 - 64	108	8.1%	81	11.9%	119	15.4%
65 - 74	88	6.6%	42	6.2%	56	7.3%
75 - 84	72	5.4%	29	4.3%	29	3.8%
85+	20	1.5%	14	2.1%	17	2.2%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	311	23.3%	127	18.6%	156	20.3%
Black Alone	988	74.1%	538	78.9%	593	77.2%
American Indian Alone	6	0.5%	3	0.4%	3	0.4%
Asian Alone	1	0.1%	1	0.1%	1	0.1%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	10	0.8%	5	0.7%	5	0.7%
Two or More Races	17	1.3%	8	1.2%	10	1.3%
Hispanic Origin (Any Race)	42	3.1%	27	4.0%	31	4.0%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 26. Franklin & I-610 Retail Analysis

Summary Demographics:								
2008 Population Estimate:		812	(ESRI business analyst)					
Per Capita Income: \$		15,455	(ESRI business analyst)					
Total Area Income: \$		12,549,460						
Portion Spent on Retail		47.71%	(BLS CE 2007)					
Total Retail Expenditure \$		5,987,347						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
<i>AUTO (Gas, Wash & Other)</i>	\$ 721,876	30%	100	2%	\$ 856,650	\$ 924,866	\$68,216	1.08

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area



Table 27. Franklin Ave & I 610 Demographics

New Orleans, LA 70122		Site Type:	Radius	Radius:	0.25 mile	ESRI	
Summary		2000		2008		2013	
	Population	1,491		812		865	
	Households	558		294		313	
	Families	378		204		213	
	Average Household Size	2.67		2.76		2.76	
	Owner Occupied HUs	343		187		193	
	Renter Occupied HUs	215		107		121	
	Median Age	34.9		36.3		37.3	
Trends: 2008-2013 Annual Rate		Area		State		National	
	Population	1.27%		0.95%		1.23%	
	Households	1.26%		1.08%		1.26%	
	Families	0.87%		0.92%		1.05%	
	Owner HHs	0.63%		0.89%		1.07%	
	Median Household Income	2.58%		1.87%		3.19%	
Households by Income		2000		2008		2013	
		Number	Percent	Number	Percent	Number	Percent
	< \$15,000	165	30.3%	69	23.5%	64	20.4%
	\$15,000 - \$24,999	54	9.9%	33	11.3%	35	11.1%
	\$25,000 - \$34,999	85	15.6%	41	14.0%	32	10.2%
	\$35,000 - \$49,999	119	21.8%	56	19.1%	60	19.1%
	\$50,000 - \$74,999	75	13.8%	65	22.2%	83	26.4%
	\$75,000 - \$99,999	26	4.8%	16	5.5%	21	6.7%
	\$100,000 - \$149,999	8	1.5%	9	3.1%	14	4.5%
	\$150,000 - \$199,999	8	1.5%	2	0.7%	2	0.6%
	\$200,000+	5	0.9%	2	0.7%	3	1.0%
	Median Household Income	\$30,754		\$35,874		\$40,754	
	Average Household Income	\$39,166		\$42,817		\$47,702	
	Per Capita Income	\$14,341		\$15,455		\$17,364	

Table 27. Continued

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	109	7.3%	53	6.6%	57	6.6%
5 - 9	119	8.0%	56	6.9%	59	6.8%
10 - 14	126	8.5%	63	7.8%	63	7.3%
15 - 19	119	8.0%	62	7.7%	64	7.4%
20 - 24	100	6.7%	53	6.6%	58	6.7%
25 - 34	175	11.7%	106	13.1%	107	12.4%
35 - 44	231	15.5%	98	12.1%	102	11.8%
45 - 54	219	14.7%	126	15.6%	123	14.3%
55 - 64	145	9.7%	101	12.5%	124	14.4%
65 - 74	78	5.2%	55	6.8%	65	7.5%
75 - 84	56	3.8%	24	3.0%	28	3.2%
85+	14	0.9%	12	1.5%	13	1.5%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	155	10.4%	76	9.3%	85	9.8%
Black Alone	1,279	85.8%	710	87.3%	749	86.6%
American Indian Alone	2	0.1%	1	0.1%	1	0.1%
Asian Alone	3	0.2%	2	0.2%	2	0.2%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	24	1.6%	11	1.4%	13	1.5%
Two or More Races	28	1.9%	13	1.6%	15	1.7%
Hispanic Origin (Any Race)	64	4.3%	32	3.9%	39	4.5%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 28: Franklin & Jasmine Retail Analysis

Summary Demographics:								
2008 Population Estimate:	1,610	(ESRI business analyst)						
Per Capita Income: \$	15,950	(ESRI business analyst)						
Total Area Income: \$	25,679,500							
Portion Spent on Retail	47.71%	(BLS CE 2007)						
Total Retail Expenditure \$	12,251,689							
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/ SURPLUS FACTOR
<i>FOOD AWAY FROM HOME</i>	\$ 1,279,112	20%	20	2%	\$ 370,227	\$ 603,872	\$233,645	1.63

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area



Table 29. Franklin Ave & Jasmine St Demographics

New Orleans, LA 70122		Site Type: Radius		Radius: 0.25 mile		ESRI	
Summary		2000		2008		2013	
Population		2,331		1,610		1,584	
Households		934		609		604	
Families		611		411		397	
Average Household Size		2.49		2.64		2.62	
Owner Occupied HUs		561		382		366	
Renter Occupied HUs		373		228		238	
Median Age		36.0		36.6		37.0	
Trends: 2008-2013 Annual Rate		Area		State		National	
Population		-0.33%		0.95%		1.23%	
Households		-0.16%		1.08%		1.26%	
Families		-0.69%		0.92%		1.05%	
Owner HHs		-0.85%		0.89%		1.07%	
Median Household Income		2.19%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	254	25.9%	123	20.2%	106	17.6%	
\$15,000 - \$24,999	149	15.2%	94	15.4%	87	14.4%	
\$25,000 - \$34,999	173	17.7%	91	14.9%	77	12.8%	
\$35,000 - \$49,999	141	14.4%	107	17.5%	103	17.1%	
\$50,000 - \$74,999	201	20.5%	135	22.1%	152	25.2%	
\$75,000 - \$99,999	19	1.9%	36	5.9%	48	8.0%	
\$100,000 - \$149,999	28	2.9%	19	3.1%	24	4.0%	
\$150,000 - \$199,999	7	0.7%	3	0.5%	4	0.7%	
\$200,000+	8	0.8%	2	0.3%	2	0.3%	
Median Household Income	\$29,138		\$34,654		\$38,620		
Average Household Income	\$37,052		\$41,794		\$45,823		
Per Capita Income	\$15,865		\$15,950		\$17,578		

Table 29. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	150	6.4%	108	6.7%	105	6.6%
5 - 9	163	7.0%	108	6.7%	113	7.1%
10 - 14	192	8.2%	113	7.0%	107	6.8%
15 - 19	186	8.0%	115	7.1%	108	6.8%
20 - 24	141	6.1%	110	6.8%	104	6.6%
25 - 34	294	12.6%	219	13.6%	216	13.6%
35 - 44	388	16.7%	212	13.2%	198	12.5%
45 - 54	357	15.3%	264	16.4%	235	14.8%
55 - 64	188	8.1%	190	11.8%	222	14.0%
65 - 74	123	5.3%	88	5.5%	100	6.3%
75 - 84	113	4.8%	54	3.4%	50	3.2%
85+	35	1.5%	29	1.8%	27	1.7%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	466	20.0%	255	15.8%	272	17.2%
Black Alone	1,799	77.2%	1,309	81.3%	1,266	79.9%
American Indian Alone	1	0.0%	1	0.1%	1	0.1%
Asian Alone	12	0.5%	8	0.5%	8	0.5%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	22	0.9%	15	0.9%	14	0.9%
Two or More Races	30	1.3%	23	1.4%	23	1.5%
Hispanic Origin (Any Race)	72	3.1%	57	3.5%	60	3.8%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 30: Franklin & Leon C. Simon Retail Analysis

Summary Demographics:								
2008 Population Estimate: 2,286 (ESRI business analyst)			Project Area:					
Per Capita Income: \$ 18,437 (ESRI business analyst)			Population within a 2-minute drive time					
Total Area Income: \$ 42,146,982								
Portion Spent on Retail 42.59% (BLS CE 2007)								
Total Retail Expenditure \$ 17,950,400								
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 9,409,392	35%	90	10%	\$ 16,802,125	\$ 27,398,815	\$10,596,690	1.63
<i>FOOD AT HOME (Including liquor)</i>	\$ 3,586,107	80%	50	25%	\$ 9,928,151	\$ 18,942,000	\$9,013,849	1.91
<i>FOOD AWAY FROM HOME</i>	\$ 2,195,556	17%	20	2%	\$ 511,547	\$ 1,418,126	\$906,578	2.77
<i>PERSONAL CARE PRODUCTS & SERVICES)</i>	\$ 477,706	20%	20	2%	\$ 125,633	\$ 772,065	\$646,432	6.15

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 31: Convenience Shopping Scenarios: Franklin & Leon C. Simon

		Inflow Consumers (with a 10% draw rate)								
		20	40	60	80	100	120	140	160	180
Retention Rates	10%	\$ 3,933,040	\$ 6,925,141	\$ 9,917,241	\$ 12,909,342	\$ 15,901,443	\$ 18,893,544	\$ 21,885,644	\$ 24,877,745	\$ 27,869,846
	20%	\$ 4,873,979	\$ 7,866,080	\$ 10,858,181	\$ 13,850,281	\$ 16,842,382	\$ 19,834,483	\$ 22,826,584	\$ 25,818,684	\$ 28,810,785
	30%	\$ 5,814,918	\$ 8,807,019	\$ 11,799,120	\$ 14,791,221	\$ 17,783,321	\$ 20,775,422	\$ 23,767,523	\$ 26,759,623	\$ 29,751,724
	40%	\$ 6,755,858	\$ 9,747,958	\$ 12,740,059	\$ 15,732,160	\$ 18,724,260	\$ 21,716,361	\$ 24,708,462	\$ 27,700,563	\$ 30,692,663
	50%	\$ 7,696,797	\$ 10,688,898	\$ 13,680,998	\$ 16,673,099	\$ 19,665,200	\$ 22,657,300	\$ 25,649,401	\$ 28,641,502	\$ 31,633,603
	60%	\$ 8,637,736	\$ 11,629,837	\$ 14,621,937	\$ 17,614,038	\$ 20,606,139	\$ 23,598,240	\$ 26,590,340	\$ 29,582,441	\$ 32,574,542
	70%	\$ 9,578,675	\$ 12,570,776	\$ 15,562,877	\$ 18,554,977	\$ 21,547,078	\$ 24,539,179	\$ 27,531,280	\$ 30,523,380	\$ 33,515,481
	80%	\$ 10,519,614	\$ 13,511,715	\$ 16,503,816	\$ 19,495,917	\$ 22,488,017	\$ 25,480,118	\$ 28,472,219	\$ 31,464,320	\$ 34,456,420

Note: **Bold Green** amounts indicate that demand exceeds supply



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Table 32. Franklin Ave & Leon C. Simon Demographics

New Orleans, LA 70122		Site Type: Drivetime		Drivetime: 2 minutes	
Summary		2000		2008	2013
Population		4,810		2,286	2,699
Households		1,933		827	983
Families		1,277		568	656
Average Household Size		2.38		2.38	2.42
Owner Occupied HUs		1,316		599	681
Renter Occupied HUs		617		228	302
Median Age		35.2		32.3	33.7
Trends: 2008-2013 Annual Rate		Area		State	National
Population		3.38%		0.95%	1.23%
Households		3.52%		1.08%	1.26%
Families		2.92%		0.92%	1.05%
Owner HHs		2.60%		0.89%	1.07%
Median Household Income		1.12%		1.87%	3.19%
Households by Income		2000	2008	2013	
	Number	Percent	Number	Percent	Number
< \$15,000	426	21.7%	135	16.3%	153
\$15,000 - \$24,999	348	17.8%	114	13.8%	120
\$25,000 - \$34,999	246	12.6%	114	13.8%	130
\$35,000 - \$49,999	363	18.5%	137	16.5%	163
\$50,000 - \$74,999	276	14.1%	164	19.8%	218
\$75,000 - \$99,999	146	7.4%	73	8.8%	86
\$100,000 - \$149,999	73	3.7%	52	6.3%	74
\$150,000 - \$199,999	36	1.8%	22	2.7%	21
\$200,000+	46	2.3%	18	2.2%	17
Median Household Income	\$33,105		\$41,116		\$43,478
Average Household Income	\$47,223		\$53,821		\$54,409
Per Capita Income	\$17,380		\$18,437		\$19,314

Table 32. Continued

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	288	6.0%	117	5.1%	147	5.4%
5 - 9	320	6.7%	119	5.2%	145	5.4%
10 - 14	329	6.8%	127	5.6%	148	5.5%
15 - 19	429	8.9%	284	12.4%	311	11.5%
20 - 24	422	8.8%	282	12.3%	320	11.8%
25 - 34	603	12.5%	279	12.2%	317	11.7%
35 - 44	671	14.0%	242	10.6%	285	10.5%
45 - 54	631	13.1%	295	12.9%	341	12.6%
55 - 64	398	8.3%	230	10.1%	324	12.0%
65 - 74	354	7.4%	150	6.6%	189	7.0%
75 - 84	295	6.1%	115	5.0%	120	4.4%
85+	69	1.4%	45	2.0%	55	2.0%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,329	27.6%	655	28.7%	761	28.2%
Black Alone	3,217	66.9%	1,494	65.4%	1,779	65.9%
American Indian Alone	9	0.2%	4	0.2%	5	0.2%
Asian Alone	96	2.0%	63	2.8%	69	2.6%
Pacific Islander Alone	1	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	49	1.0%	19	0.8%	23	0.9%
Two or More Races	108	2.2%	50	2.2%	62	2.3%
Hispanic Origin (Any Race)	219	4.6%	128	5.6%	158	5.9%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 33. Franklin & Robert E. Lee Retail Analysis

Summary Demographics:								
2008 Population Estimate:		724 (ESRI business analyst)			Project Area:			
Per Capita Income: \$		15,217 (ESRI business analyst)			Pedestrian Population with 1/4 mile			
Total Area Income: \$		11,017,108						
Portion Spent on Retail		47.71% (BLS CE 2007)						
Total Retail Expenditure \$		5,256,262						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 2,625,595	15%	40	2%	\$ 1,438,275	\$ 2,521,009	\$1,082,734	1.75
<i>FOOD AT HOME (Including liquor)</i>	\$ 1,020,184	15%	40	2%	\$ 558,847	\$ 757,680	\$198,833	1.36
<i>AUTO (Gas, Wash & Other)</i>	\$ 633,731	15%	40	2%	\$ 347,152	\$ 2,161,069	\$1,813,917	6.23

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 34. Convenience Shopping Scenarios: Franklin & R.E. Lee

Retention Rates	Inflow Consumers (with a 2% draw rate)			
	20	40	60	80
10%	\$ 784,777	\$ 1,306,995	\$ 1,829,213	\$ 2,351,431
20%	\$ 1,047,337	\$ 1,569,555	\$ 2,091,772	\$ 2,613,990
30%	\$ 1,309,896	\$ 1,832,114	\$ 2,354,332	\$ 2,876,550
40%	\$ 1,572,546	\$ 2,094,674	\$ 2,616,891	\$ 3,139,109

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 35. Franklin Ave & Robert E Lee Blvd Demographics

New Orleans, LA 70122		Site Type: Radius		Radius: 0.25 mile		ESRI	
Summary		2000		2008		2013	
Population		1,928		724		948	
Households		716		256		340	
Families		483		178		231	
Average Household Size		2.69		2.83		2.79	
Owner Occupied HUs		461		171		224	
Renter Occupied HUs		255		85		116	
Median Age		35.2		36.2		37.2	
Trends: 2008-2013 Annual Rate		Area		State		National	
Population		5.54%		0.95%		1.23%	
Households		5.84%		1.08%		1.26%	
Families		5.35%		0.92%		1.05%	
Owner HHs		5.55%		0.89%		1.07%	
Median Household Income		2.46%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	176	24.0%	50	19.6%	60	17.8%	
\$15,000 - \$24,999	164	22.3%	41	16.1%	45	13.4%	
\$25,000 - \$34,999	91	12.4%	45	17.6%	58	17.2%	
\$35,000 - \$49,999	144	19.6%	51	20.0%	64	19.0%	
\$50,000 - \$74,999	78	10.6%	39	15.3%	66	19.6%	
\$75,000 - \$99,999	53	7.2%	14	5.5%	20	5.9%	
\$100,000 - \$149,999	20	2.7%	14	5.5%	21	6.2%	
\$150,000 - \$199,999	0	0.0%	0	0.0%	2	0.6%	
\$200,000+	8	1.1%	1	0.4%	1	0.3%	
Median Household Income	\$27,294		\$32,170		\$36,323		
Average Household Income	\$39,025		\$41,340		\$45,205		
Per Capita Income	\$15,265		\$15,217		\$16,705		

Table 35. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	124	6.4%	46	6.4%	64	6.8%
5 - 9	149	7.7%	47	6.5%	63	6.6%
10 - 14	149	7.7%	54	7.5%	65	6.9%
15 - 19	154	8.0%	53	7.3%	70	7.4%
20 - 24	132	6.8%	46	6.4%	66	7.0%
25 - 34	252	13.1%	104	14.4%	121	12.8%
35 - 44	292	15.1%	94	13.0%	119	12.6%
45 - 54	251	13.0%	107	14.8%	134	14.1%
55 - 64	176	9.1%	79	10.9%	122	12.9%
65 - 74	132	6.8%	49	6.8%	68	7.2%
75 - 84	95	4.9%	31	4.3%	39	4.1%
85+	25	1.3%	13	1.8%	17	1.8%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	319	16.5%	96	13.3%	137	14.5%
Black Alone	1,523	79.0%	599	82.7%	771	81.3%
American Indian Alone	2	0.1%	0	0.0%	0	0.0%
Asian Alone	18	0.9%	7	1.0%	9	0.9%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	21	1.1%	6	0.8%	8	0.8%
Two or More Races	46	2.4%	16	2.2%	23	2.4%
Hispanic Origin (Any Race)	74	3.8%	30	4.1%	44	4.6%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 36. Lake Terrace at Paris & Robert E. Lee Retail Analysis

Summary Demographics:						
2008 Population Estimate:	2,861	(ESRI business analyst)				Project Area: Population within 2 minute drive
Per Capita Income: \$	25,396	(ESRI business analyst)				
Total Area Income: \$	72,657,956					
Portion Spent on Retail	41.90%	(BLS CE 2007)				
Total Retail Expenditure \$	30,443,684					
						LEAKAGE/
RETAIL CATEGORY	EXPENDITURE	RETENTION	DEMAND	RETAIL	RETAIL	SURPLUS
	POTENTIAL	RATES	POTENTIAL	SUPPLY	GAP	FACTOR
COMPARISON GOODS SUBTOTAL	\$ 16,724,375	10%	\$ 1,672,437	\$ -	\$1,672,437	0.00
CONVENIENCE GOODS SUBTOTAL	\$ 13,719,309	10%	\$ 1,371,931	\$ -	\$1,371,931	0.00

Note: in this example inflow by outsiders is considered nil.

Table 37. Lake Terrace Re-Occupancy Analysis

TOTAL SQ FT OF EXISTING VACANCY: 15,235			
COMPARISON GOODS SALES SCENARIOS			
RETENTION RATE	SALES POTENTIAL	SQUARE FEET POTENTIAL	PERCENT of VACANCY
5%	\$ 836,219	4,074	27%
10%	\$ 1,672,437	8,149	53%
15%	\$ 2,508,656	12,223	80%
20%	\$ 3,344,875	16,297	107%
CONVENIENCE GOODS SALES SCENARIOS			
RETENTION RATE	SALES POTENTIAL	SQUARE FEET POTENTIAL	PERCENT of VACANCY
5%	\$ 685,965	1,984	13%
10%	\$ 1,371,931	3,968	26%
15%	\$ 2,057,896	5,952	39%
20%	\$ 2,743,862	7,936	52%

Note: comparison goods and convenience goods potential should be added together, for example 5% retention in both categories would sustain 6,058 (4,074 + 1,984) or 40% of the existing vacancy space (not counting inflow).

Note: in this example inflow by outsiders is considered null.



Table 38. Robert E Lee Blvd & Paris Ave Demographics

New Orleans, LA 70122		Site Type: Drivetime		Drivetime: 2 minutes		ESRI	
Summary		2000		2008		2013	
Population		5,931		2,861		3,312	
Households		2,579		1,145		1,352	
Families		1,579		742		844	
Average Household Size		2.26		2.40		2.36	
Owner Occupied HUs		1,913		878		1,000	
Renter Occupied HUs		666		267		352	
Median Age		39.9		41.1		42.6	
Trends: 2008-2013 Annual Rate		Area		State		National	
Population		2.97%		0.95%		1.23%	
Households		3.38%		1.08%		1.26%	
Families		2.61%		0.92%		1.05%	
Owner HHs		2.64%		0.89%		1.07%	
Median Household Income		2.10%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	446	17.2%	157	13.7%	167	12.4%	
\$15,000 - \$24,999	322	12.4%	124	10.8%	134	9.9%	
\$25,000 - \$34,999	335	12.9%	143	12.5%	145	10.7%	
\$35,000 - \$49,999	385	14.8%	200	17.5%	219	16.2%	
\$50,000 - \$74,999	440	17.0%	196	17.1%	269	19.9%	
\$75,000 - \$99,999	289	11.1%	140	12.2%	167	12.4%	
\$100,000 - \$149,999	208	8.0%	106	9.2%	152	11.3%	
\$150,000 - \$199,999	79	3.0%	39	3.4%	49	3.6%	
\$200,000+	89	3.4%	41	3.6%	48	3.6%	
Median Household Income	\$41,502		\$45,748		\$50,749		
Average Household Income	\$58,349		\$64,099		\$67,299		
Per Capita Income	\$24,746		\$25,396		\$27,246		

Table 38. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	304	5.1%	136	4.8%	160	4.8%
5 - 9	324	5.5%	129	4.5%	147	4.4%
10 - 14	311	5.2%	131	4.6%	142	4.3%
15 - 19	377	6.4%	209	7.3%	223	6.7%
20 - 24	465	7.8%	252	8.8%	279	8.4%
25 - 34	770	13.0%	372	13.0%	412	12.5%
35 - 44	874	14.7%	342	12.0%	386	11.7%
45 - 54	823	13.9%	420	14.7%	474	14.3%
55 - 64	485	8.2%	339	11.9%	465	14.1%
65 - 74	521	8.8%	205	7.2%	284	8.6%
75 - 84	555	9.4%	222	7.8%	204	6.2%
85+	125	2.1%	102	3.6%	133	4.0%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	3,594	60.6%	1,534	53.6%	1,844	55.7%
Black Alone	1,849	31.2%	1,051	36.7%	1,148	34.7%
American Indian Alone	10	0.2%	6	0.2%	6	0.2%
Asian Alone	291	4.9%	176	6.2%	199	6.0%
Pacific Islander Alone	3	0.1%	2	0.1%	2	0.1%
Some Other Race Alone	87	1.5%	41	1.4%	51	1.5%
Two or More Races	97	1.6%	51	1.8%	62	1.9%
Hispanic Origin (Any Race)	315	5.3%	194	6.8%	239	7.2%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 39. Gentilly & Elysian Fields Retail Analysis

Summary Demographics:									
2008 Population Estimate:		6,736	(ESRI business analyst)		Project Area:				
Per Capita Income: \$		17,480	(ESRI business analyst)		Population within 2 minute drive				
Total Area Income: \$		117,745,280							
Portion Spent on Retail		42.59%(BLS CE 2007)							
Total Retail Expenditure \$		50,147,715							
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR	
COMPARISON GOODS SUBTOTAL	\$ 23,860,862	20%	500	2%	\$ 17,524,415	\$ 20,069,362	\$2,544,947	1.15	
APPAREL & SERVICES	\$ 4,008,963	20%	220	2%	\$ 1,744,518	\$ 5,891,274	\$4,146,756	3.38	
<i>MENS & BOYS CLOTHING</i>	\$ 853,589	20%	60	0%	\$ 170,718	\$ 2,234,463	\$2,063,745	13.09	
<i>WOMEN AND GIRLS</i>	\$ 1,545,975	20%	60	0%	\$ 309,195	\$ 2,336,546	\$2,027,351	7.56	
<i>CHILDREN'S CLOTHING</i>	\$ 221,986	20%	50	2%	\$ 56,261	\$ 488,561	\$432,300	8.68	
<i>SHOES</i>	\$ 784,879	20%	50	0%	\$ 156,976	\$ 229,342	\$72,366	1.46	
<i>OTHER APPAREL</i>	\$ 602,534	20%	0	0%	\$ 120,507	\$ 116,189	\$4,318	0.96	
FURNITURE & HOME EQUIPMENT	\$ 5,005,258	20%	120	2%	\$ 1,643,056	\$ 7,216,465	\$5,573,409	4.39	
<i>HOUSEHOLD TEXTILES</i>	\$ 285,411	20%	20	2%	\$ 63,184	\$ 703,824	\$640,641	11.14	
<i>FURNITURE</i>	\$ 776,951	20%	50	2%	\$ 196,914	\$ 1,774,501	\$1,577,587	9.01	
<i>HOME IMPROVEMENT</i>	\$ 3,327,149	20%	50	2%	\$ 843,246	\$ 6,934,571	\$6,091,325	8.22	
<i>APPLIANCES (Small & Major)</i>	\$ 615,747	20%	0	2%	\$ 123,149	\$ -	\$123,149	0.00	
ENTERTAINMENT	\$ 3,488,353	20%	120	2%	\$ 1,145,108	\$ 1,077,668	\$67,440	0.94	
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	\$ 2,341,425	20%	50	2%	\$ 593,420	\$ 1,141,302	\$547,882	1.92	
<i>READING</i>	\$ 253,698	20%	20	2%	\$ 56,163	\$ -	\$56,163	0.00	
<i>OTHER</i>	\$ 893,230	20%	50	2%	\$ 226,384	\$ 261,905	\$35,521	1.16	
AUTO RELATED	\$ 11,358,288	20%	40	2%	\$ 2,757,285	\$ 28,229,075	\$25,471,790	10.24	
<i>Auto Sales</i>	\$ 5,679,144	20%	20	2%	\$ 1,257,236	\$ -	\$1,257,236	0.00	
<i>Auto Repair</i>	\$ 1,818,172	20%	20	2%	\$ 402,503	\$ 43,156,600	\$42,754,098	107.22	
CONVENIENCE GOODS SUBTOTAL	\$ 26,286,853	20%	500	3%	\$ 26,330,560	\$ 27,693,411	\$1,362,851	1.05	
<i>FOOD AT HOME (Including liquor)</i>	\$ 10,018,444	20%	0	3%	\$ 2,003,689	\$ -	\$2,003,689	0.00	
<i>FOOD AWAY FROM HOME</i>	\$ 6,133,687	20%	125	3%	\$ 2,456,024	\$ 3,905,560	\$1,449,536	1.59	
<i>DRUG</i>	\$ 2,629,478	20%	230	3%	\$ 1,495,555	\$ 12,518,908	\$11,023,353	8.37	
<i>PERSONAL CARE PRODUCTS & SERVICES</i>	\$ 1,334,559	20%	125	3%	\$ 534,378	\$ 7,721,671	\$7,187,293	14.45	
<i>AUTO (Gas, Wash & Other)</i>	\$ 6,170,685	20%	20	3%	\$ 1,432,009	\$ 1,371,420	\$60,589	0.96	

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

LADOTD reports daily average traffic counts at Gentilly and Elysian Fields at 20,083 in 2008.

Table 40. Comparison Shopping Scenarios: Gentilly & Elysian Fields

		Inflow Consumers (with a 2% draw rate)						
		100	200	300	400	500	600	700
Retention Rates	10%	\$ 4,936,535	\$ 7,486,983	\$ 10,037,431	\$ 12,587,880	\$ 15,138,328	\$ 17,688,777	\$ 20,239,225
	20%	\$ 7,322,621	\$ 9,873,069	\$ 12,423,518	\$ 14,973,966	\$ 17,524,415	\$ 20,074,863	\$ 22,625,311
	30%	\$ 9,708,707	\$ 12,259,155	\$ 14,809,604	\$ 17,360,052	\$ 19,910,501	\$ 22,460,949	\$ 25,011,398
	40%	\$ 12,094,793	\$ 14,645,242	\$ 17,195,690	\$ 19,746,138	\$ 22,296,587	\$ 24,847,035	\$ 27,397,484

Note: **Bold Green** amounts indicate that demand exceeds supply

Table 41: Convenience Shopping Scenarios: Gentilly & Elysian Fields

		Inflow Consumers (with a 3% draw rate)						
		100	200	300	400	500	600	700
Retention Rates	10%	\$ 6,843,323	\$ 11,057,961	\$ 15,272,599	\$ 19,487,237	\$ 23,701,875	\$ 27,916,513	\$ 32,131,151
	20%	\$ 9,472,008	\$ 13,686,646	\$ 17,901,284	\$ 22,115,922	\$ 26,330,560	\$ 30,545,198	\$ 34,759,836
	30%	\$ 12,100,694	\$ 16,315,332	\$ 20,529,970	\$ 24,744,608	\$ 28,959,245	\$ 33,173,883	\$ 37,388,521
	40%	\$ 14,729,379	\$ 18,944,017	\$ 23,158,655	\$ 27,373,293	\$ 31,587,931	\$ 35,802,569	\$ 4,017,207

Note: **Bold Green** amounts indicate that demand exceeds supply



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Table 42. Elysian Fields Ave & Gentilly Blvd Demographics

New Orleans, LA 70122		Site Type: Drivetime		Drivetime: 2 minutes		
Summary		2000		2008	2013	
Population		9,426		6,736	6,583	
Households		3,914		2,604	2,568	
Families		2,427		1,683	1,612	
Average Household Size		2.39		2.53	2.50	
Owner Occupied HUs		2,433		1,701	1,615	
Renter Occupied HUs		1,481		903	953	
Median Age		37.7		39.0	40.0	
Trends: 2008-2013 Annual Rate		Area		State	National	
Population		-0.46%		0.95%	1.23%	
Households		-0.28%		1.08%	1.26%	
Families		-0.86%		0.92%	1.05%	
Owner HHs		-1.03%		0.89%	1.07%	
Median Household Income		1.95%		1.87%	3.19%	
Households by Income		2000		2008	2013	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	1,024	25.7%	507	19.5%	444	17.3%
\$15,000 - \$24,999	523	13.1%	311	11.9%	287	11.2%
\$25,000 - \$34,999	729	18.3%	439	16.9%	334	13.0%
\$35,000 - \$49,999	663	16.6%	461	17.7%	488	19.0%
\$50,000 - \$74,999	593	14.9%	495	19.0%	576	22.4%
\$75,000 - \$99,999	218	5.5%	218	8.4%	220	8.6%
\$100,000 - \$149,999	182	4.6%	129	5.0%	158	6.2%
\$150,000 - \$199,999	35	0.9%	33	1.3%	42	1.6%
\$200,000+	23	0.6%	11	0.4%	18	0.7%
Median Household Income	\$30,104		\$36,205		\$39,883	
Average Household Income	\$39,272		\$44,803		\$49,020	
Per Capita Income	\$16,355		\$17,480		\$19,303	

Table 42. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	536	5.7%	377	5.6%	362	5.5%
5 - 9	650	6.9%	398	5.9%	385	5.8%
10 - 14	683	7.2%	436	6.5%	386	5.9%
15 - 19	721	7.7%	544	8.1%	510	7.7%
20 - 24	632	6.7%	480	7.1%	480	7.3%
25 - 34	1,105	11.7%	832	12.4%	807	12.3%
35 - 44	1,452	15.4%	832	12.4%	758	11.5%
45 - 54	1,382	14.7%	1,033	15.3%	959	14.6%
55 - 64	859	9.1%	839	12.5%	953	14.5%
65 - 74	671	7.1%	472	7.0%	515	7.8%
75 - 84	527	5.6%	323	4.8%	300	4.6%
85+	206	2.2%	168	2.5%	168	2.6%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	2,024	21.5%	1,202	17.8%	1,255	19.1%
Black Alone	7,097	75.3%	5,311	78.8%	5,100	77.5%
American Indian Alone	9	0.1%	6	0.1%	6	0.1%
Asian Alone	37	0.4%	31	0.5%	29	0.4%
Pacific Islander Alone	1	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	111	1.2%	74	1.1%	77	1.2%
Two or More Races	147	1.6%	111	1.6%	114	1.7%
Hispanic Origin (Any Race)	264	2.8%	213	3.2%	225	3.4%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 43. Gentilly Woods Area Retail Analysis

Summary Demographics:									
2008 Population Estimate: 527 (ESRI business analyst)					Project Area:				
Per Capita Income: \$ 15,762 (ESRI business analyst)					Population within a 2-minute drive time				
Total Area Income: \$ 8,306,574									
Portion Spent on Retail 47.71%(BLS CE 2007)									
Total Retail Expenditure \$ 3,963,066									
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR	
COMPARISON GOODS SUBTOTAL	\$ 1,983,445	27%	650	2%	\$ 18,149,429	\$ 18,139,679	\$9,750	1.00	
APPAREL & SERVICES	\$ 304,520	15%	190	2%	\$ 836,160	\$ 6,497,410	\$5,661,250	7.77	
<i>MENS & BOYS CLOTHING</i>	\$ 62,864	15%	90	2%	\$ 86,727	\$ 2,947,982	\$2,861,254	33.99	
<i>WOMEN AND GIRLS</i>	\$ 122,860	15%	80	2%	\$ 152,712	\$ 1,921,125	\$1,768,413	12.58	
<i>CHILDREN'S CLOTHING</i>	\$ 19,122	15%	10	2%	\$ 5,481	\$ 330,428	\$324,947	60.29	
<i>SHOES</i>	\$ 66,210	15%	10	2%	\$ 18,977	\$ 791,064	\$772,087	41.68	
FURNITURE & HOME EQUIPMENT	\$ 347,784	30%	400	2%	\$ 2,004,939	\$ 665,734	\$1,339,206	0.33	
<i>HOUSEHOLD TEXTILES</i>	\$ 19,839	30%	100	2%	\$ 33,057	\$ 81,745	\$48,688	2.47	
<i>FURNITURE</i>	\$ 48,283	30%	100	2%	\$ 80,451	\$ 129,715	\$49,264	1.61	
<i>HOME IMPROVEMENT</i>	\$ 228,271	50%	120	2%	\$ 488,378	\$ 491,166	\$2,788	1.01	
<i>APPLIANCES (Small & Major)</i>	\$ 51,391	30%	80	2%	\$ 71,586	\$ 76,580	\$4,994	1.07	
ENTERTAINMENT	\$ 263,647	30%	40	2%	\$ 223,174	\$ 389,753	\$166,579	1.75	
<i>AUDIO & VISUAL</i>									
<i>EQUIPMENT/SERVICES</i>	\$ 182,617	30%	20	2%	\$ 104,684	\$ 147,075	\$42,391	1.40	
<i>READING</i>	\$ 16,732	30%	20	2%	\$ 9,591	\$ 197,625	\$188,034	20.60	
OTHER									
<i>Auto Repair</i>	\$ 134,811	30%	20	2%	\$ 77,280	\$ 72,194,517	\$72,117,237	934.20	
CONVENIENCE GOODS SUBTOTAL	\$ 1,979,621	70%	650	5%	\$ 45,335,575	\$ 45,284,460	\$51,115	1.00	
<i>FOOD AT HOME (Including liquor)</i>	\$ 769,189	70%	600	5%	\$ 16,301,691	\$ 15,624,985	\$676,706	0.96	
<i>FOOD AWAY FROM HOME</i>	\$ 413,756	70%	600	5%	\$ 8,768,871	\$ 8,101,758	\$667,113	0.92	
<i>DRUG</i>	\$ 219,905	70%	900	5%	\$ 6,913,814	\$ 7,901,278	\$987,464	1.14	
<i>PERSONAL CARE</i>	\$ 98,957	70%	700	5%	\$ 2,435,228	\$ 2,151,161	\$284,067	0.88	
<i>AUTO (Gas, Wash & Other)</i>	\$ 477,815	70%	500	5%	\$ 8,494,496	\$ 7,747,320	\$747,176	0.91	

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 44. Comparison Shopping Scenarios: Gentilly Woods Area

		Inflow Consumers (with a 2% draw rate)							
		100	200	300	400	500	600	700	800
Retention Rates	10%	\$ 2,908,175	\$ 5,618,006	\$ 8,327,836	\$ 11,037,667	\$ 13,747,497	\$ 16,457,328	\$ 19,167,159	\$ 21,876,989
	20%	\$ 3,106,520	\$ 5,816,350	\$ 8,526,181	\$ 11,236,011	\$ 13,945,842	\$ 16,655,673	\$ 19,365,503	\$ 22,075,334
	30%	\$ 3,304,864	\$ 6,014,695	\$ 8,724,525	\$ 11,434,356	\$ 14,144,187	\$ 16,854,017	\$ 19,563,848	\$ 22,273,678
	40%	\$ 3,503,209	\$ 6,213,039	\$ 8,922,870	\$ 11,632,701	\$ 14,342,531	\$ 17,052,362	\$ 19,762,192	\$ 22,472,023
	50%	\$ 3,701,553	\$ 6,411,384	\$ 9,121,214	\$ 11,831,045	\$ 14,540,876	\$ 17,250,706	\$ 19,960,537	\$ 22,670,367
	60%	\$ 3,899,898	\$ 6,609,728	\$ 9,319,559	\$ 12,029,390	\$ 14,739,220	\$ 17,449,051	\$ 20,158,881	\$ 22,868,712
	70%	\$ 4,098,242	\$ 6,808,073	\$ 9,517,904	\$ 12,227,734	\$ 14,937,565	\$ 17,647,395	\$ 20,357,226	\$ 23,067,057
	80%	\$ 4,296,587	\$ 7,006,418	\$ 9,716,248	\$ 12,426,079	\$ 15,135,909	\$ 17,845,740	\$ 20,555,570	\$ 23,265,401

Note: **Bold Green** amounts indicate that demand exceeds supply

Table 45. Convenience Shopping Scenarios: Gentilly Woods Area

		Inflow Consumers (with a 5% draw rate)								
		100	200	300	400	500	600	700	800	900
Retention Rates	30%	\$ 7,355,400	\$ 14,116,914	\$ 20,878,428	\$ 27,639,942	\$ 34,401,456	\$ 41,162,970	\$ 47,924,484	\$ 54,685,997	\$ 61,447,511
	40%	\$ 7,553,362	\$ 14,314,876	\$ 21,076,390	\$ 27,837,904	\$ 34,599,418	\$ 41,360,932	\$ 48,122,446	\$ 54,883,960	\$ 61,645,473
	50%	\$ 7,751,324	\$ 14,512,838	\$ 21,274,352	\$ 28,035,866	\$ 34,797,380	\$ 41,558,894	\$ 48,320,408	\$ 55,081,922	\$ 61,843,436
	60%	\$ 7,949,287	\$ 14,710,800	\$ 21,472,314	\$ 28,233,828	\$ 34,995,342	\$ 41,756,856	\$ 48,518,370	\$ 55,279,884	\$ 62,041,398
	70%	\$ 8,147,249	\$ 14,908,762	\$ 21,670,276	\$ 28,431,790	\$ 35,193,304	\$ 41,954,818	\$ 48,716,332	\$ 55,477,846	\$ 62,239,360
	80%	\$ 8,345,211	\$ 15,106,725	\$ 21,868,238	\$ 28,629,752	\$ 35,391,266	\$ 42,152,780	\$ 48,914,294	\$ 55,675,808	\$ 62,437,322

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 46. Gentilly Woods Demographics

New Orleans, LA 70126		Site Type: Drivetime		Drivetime: 2 minutes	
Summary		2000		2008	2013
Population		1,546		527	745
Households		539		178	253
Families		405		134	189
Average Household Size		2.83		2.94	2.93
Owner Occupied HUs		462		153	216
Renter Occupied HUs		77		25	37
Median Age		39.4		41.8	42.2
Trends: 2008-2013 Annual Rate		Area		State	National
Population		7.17%		0.95%	1.23%
Households		7.29%		1.08%	1.26%
Families		7.12%		0.92%	1.05%
Owner HHs		7.14%		0.89%	1.07%
Median Household Income		2.59%		1.87%	3.19%
Households by Income		2000	2008	2013	
	Number	Percent	Number	Percent	Number
< \$15,000	76	14.6%	19	10.7%	21
\$15,000 - \$24,999	92	17.7%	22	12.4%	24
\$25,000 - \$34,999	80	15.4%	23	12.9%	30
\$35,000 - \$49,999	127	24.5%	46	25.8%	52
\$50,000 - \$74,999	94	18.1%	43	24.2%	79
\$75,000 - \$99,999	35	6.7%	15	8.4%	25
\$100,000 - \$149,999	15	2.9%	9	5.1%	18
\$150,000 - \$199,999	0	0.0%	1	0.6%	3
\$200,000+	0	0.0%	0	0.0%	1
Median Household Income	\$36,163		\$43,884		\$49,859
Average Household Income	\$39,503		\$47,445		\$53,910
Per Capita Income	\$13,289		\$15,762		\$18,015

Table 46. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	82	5.3%	27	5.1%	41	5.5%
5 - 9	104	6.7%	29	5.5%	43	5.8%
10 - 14	111	7.2%	36	6.8%	47	6.3%
15 - 19	132	8.5%	37	7.0%	52	7.0%
20 - 24	110	7.1%	32	6.1%	45	6.0%
25 - 34	152	9.8%	64	12.2%	83	11.2%
35 - 44	214	13.8%	57	10.8%	85	11.4%
45 - 54	264	17.1%	79	15.0%	102	13.7%
55 - 64	164	10.6%	81	15.4%	121	16.3%
65 - 74	118	7.6%	44	8.4%	71	9.5%
75 - 84	75	4.9%	29	5.5%	38	5.1%
85+	20	1.3%	11	2.1%	16	2.2%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	160	10.4%	41	7.8%	65	8.7%
Black Alone	1,329	86.0%	467	88.6%	652	87.4%
American Indian Alone	5	0.3%	2	0.4%	3	0.4%
Asian Alone	19	1.2%	7	1.3%	10	1.3%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	10	0.6%	3	0.6%	5	0.7%
Two or More Races	22	1.4%	7	1.3%	11	1.5%
Hispanic Origin (Any Race)	30	1.9%	11	2.1%	16	2.1%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 47. Mirabeau & St. Anthony Retail Analysis

Summary Demographics:								
2008 Population Estimate:		706	(ESRI business analyst)			Project Area:		
Per Capita Income: \$		17,472	(ESRI business analyst)			Pedestrian Population with 1/4 mile		
Total Area Income: \$		12,335,232						
Portion Spent on Retail		42.59% (BLS CE 2007)						
Total Retail Expenditure \$		5,253,575						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
<i>HOME IMPROVEMENT (Floor Coverings, Materials, Hardware, cleaning)</i>	\$ 348,559	20%	57	10%	\$ 1,082,803	\$ 1,091,900	\$9,097	1.01
<i>FOOD AWAY FROM HOME</i>	\$ 642,577	20%	38	8%	\$ 1,124,601	\$ 1,143,851	\$19,249	1.02

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area



Table 48. Mirabeau Ave & Saint Anthony Ave Demographics

New Orleans, LA 70122		Site Type:	Radius	Radius:	0.25 mile	ESRI	
Summary		2000		2008		2013	
	Population	1,847		706		913	
	Households	712		256		334	
	Families	499		184		234	
	Average Household Size	2.58		2.70		2.69	
	Owner Occupied HUs	439		168		210	
	Renter Occupied HUs	273		88		124	
	Median Age	36.6		38.6		38.3	
Trends: 2008-2013 Annual Rate		Area		State		National	
	Population	5.28%		0.95%		1.23%	
	Households	5.46%		1.08%		1.26%	
	Families	4.93%		0.92%		1.05%	
	Owner HHs	4.56%		0.89%		1.07%	
	Median Household Income	1.30%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number		Percent	Number	Percent	Number	Percent
	< \$15,000	159	23.9%	47	18.3%	57	17.0%
	\$15,000 - \$24,999	123	18.5%	36	14.0%	40	11.9%
	\$25,000 - \$34,999	82	12.3%	37	14.4%	50	14.9%
	\$35,000 - \$49,999	121	18.2%	53	20.6%	71	21.1%
	\$50,000 - \$74,999	99	14.9%	43	16.7%	57	17.0%
	\$75,000 - \$99,999	44	6.6%	24	9.3%	33	9.8%
	\$100,000 - \$149,999	26	3.9%	10	3.9%	19	5.7%
	\$150,000 - \$199,999	6	0.9%	5	1.9%	5	1.5%
	\$200,000+	6	0.9%	2	0.8%	4	1.2%
	Median Household Income	\$31,177		\$37,495		\$40,000	
	Average Household Income	\$43,372		\$45,734		\$48,242	
	Per Capita Income	\$16,939		\$17,472		\$18,552	

Table 48. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	122	6.6%	44	6.2%	61	6.7%
5 - 9	151	8.2%	47	6.7%	62	6.8%
10 - 14	127	6.9%	53	7.5%	66	7.2%
15 - 19	135	7.3%	53	7.5%	71	7.8%
20 - 24	104	5.6%	40	5.7%	60	6.6%
25 - 34	244	13.2%	82	11.6%	101	11.1%
35 - 44	277	15.0%	92	13.0%	116	12.7%
45 - 54	225	12.2%	100	14.2%	123	13.5%
55 - 64	175	9.5%	76	10.8%	118	12.9%
65 - 74	152	8.2%	57	8.1%	64	7.0%
75 - 84	107	5.8%	44	6.2%	48	5.3%
85+	29	1.6%	17	2.4%	22	2.4%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	280	15.2%	85	12.0%	120	13.1%
Black Alone	1,470	79.7%	585	82.9%	745	81.6%
American Indian Alone	5	0.3%	2	0.3%	3	0.3%
Asian Alone	5	0.3%	2	0.3%	3	0.3%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	26	1.4%	9	1.3%	12	1.3%
Two or More Races	59	3.2%	23	3.3%	30	3.3%
Hispanic Origin (Any Race)	58	3.1%	23	3.3%	33	3.6%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 49. Oak Park at Paris & Mirabeau Retail Analysis

Summary Demographics:								
2008 Population Estimate:		3,378	(ESRI business analyst)		Project Area:			
Per Capita Income: \$		19,309	(ESRI business analyst)		Population within a 2-minute drive time			
Total Area Income: \$		65,225,802						
Portion Spent on Retail		42.59%	(BLS CE 2007)					
Total Retail Expenditure \$		27,779,669						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
COMPARISON GOODS SUBTOTAL	\$ 13,217,887	10%	40	2%	\$ 2,448,713	\$ 2,462,901	\$14,188	1.01
APPAREL & SERVICES	\$ 2,220,792	20%	100	2%	\$ 917,507	\$ 1,839,400	\$921,893	2.00
<i>MENS & BOYS CLOTHING</i>	\$ 472,852	20%	20	2%	\$ 114,727	\$ 454,760	\$340,033	3.96
<i>WOMEN AND GIRLS</i>	\$ 856,403	20%	20	2%	\$ 207,788	\$ 440,625	\$232,837	2.12
<i>CHILDREN'S CLOTHING</i>	\$ 122,971	20%	20	2%	\$ 29,836	\$ 472,040	\$442,204	15.82
<i>SHOES</i>	\$ 434,789	20%	20	2%	\$ 105,492	\$ 249,285	\$143,793	2.36
<i>OTHER APPAREL</i>	\$ 333,778	20%	10	2%	\$ 73,870	\$ 84,195	\$10,325	1.14
FURNITURE & HOME EQUIPMENT	\$ 2,772,697	20%	20	2%	\$ 672,736	\$ 435,120	\$237,616	0.65
<i>HOUSEHOLD TEXTILES</i>	\$ 158,105	20%	20	2%	\$ 38,361	\$ 163,490	\$125,129	4.26
<i>FURNITURE</i>	\$ 430,397	20%	0	2%	\$ 86,079	\$ -	\$86,079	0.00
<i>HOME IMPROVEMENT</i>	\$ 1,843,097	20%	20	2%	\$ 447,188	\$ 157,425	\$289,763	0.35
<i>APPLIANCES (Small & Major)</i>	\$ 341,097	20%	20	2%	\$ 82,760	\$ 76,580	\$6,180	0.93
ENTERTAINMENT	\$ 1,932,397	10%	0	2%	\$ 193,240	\$ 194,877	\$1,637	1.01
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	\$ 1,297,048	10%	0	2%	\$ 129,705	\$ 147,075	\$17,370	1.13
<i>READING</i>	\$ 140,538	10%	0	2%	\$ 14,054	\$ 65,875	\$51,821	4.69
<i>OTHER</i>	\$ 494,811	10%	0	2%	\$ 49,481	\$ -	\$49,481	0.00
OTHER								
<i>Auto Repair</i>	\$ 1,007,189	20%	20	2%	\$ 244,373	\$ 677,285	\$432,912	2.77
CONVENIENCE GOODS SUBTOTAL	\$ 14,561,782	10%	10	2%	\$ 1,766,554	\$ 3,544,143	\$1,777,589	2.01
<i>FOOD AT HOME (Including liquor)</i>	\$ 5,549,785	5%	0	2%	\$ 277,489	\$ 405,900	\$128,411	1.46
<i>FOOD AWAY FROM HOME</i>	\$ 3,397,798	5%	0	2%	\$ 169,890	\$ 454,528	\$284,638	2.68
<i>DRUG</i>	\$ 1,456,617	5%	0	2%	\$ 72,831	\$ -	\$72,831	0.00
<i>PERSONAL CARE</i>	\$ 739,288	20%	20	2%	\$ 179,373	\$ 1,429,750	\$1,250,377	7.97
<i>AUTO (Gas, Wash & Other)</i>	\$ 3,418,293	5%	0	2%	\$ 170,915	\$ -	\$170,915	0.00

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 50. Comparison Shopping Scenarios: Oak Park

		Inflow Consumers (with a 2% draw rate)					
		10	20	30	40	50	60
Retention Rates	5%	\$ 942,626	\$ 1,224,357	\$ 1,506,088	\$ 1,787,819	\$ 2,069,550	\$ 2,351,281
	10%	\$ 1,603,520	\$ 1,885,251	\$ 2,166,982	\$ 2,448,713	\$ 2,730,445	\$ 3,012,176
	15%	\$ 2,264,414	\$ 2,546,145	\$ 2,827,877	\$ 3,109,608	\$ 3,391,339	\$ 3,673,070
	20%	\$ 2,925,309	\$ 3,207,040	\$ 3,488,772	\$ 3,770,503	\$ 4,052,233	\$ 4,333,964

Note: **Green** amounts indicate that demand exceeds supply

Table 51. Convenience Shopping Scenarios: Oak Park

		Inflow Consumers (with a 2% draw rate)					
		10	20	30	40	50	60
Retention Rates	5%	\$ 1,038,465	\$ 1,348,840	\$ 1,659,215	\$ 1,969,591	\$ 2,279,966	\$ 2,590,342
	10%	\$ 1,766,554	\$ 2,076,929	\$ 2,387,305	\$ 2,697,680	\$ 3,008,055	\$ 3,318,431
	15%	\$ 2,494,643	\$ 2,805,018	\$ 3,115,395	\$ 3,425,769	\$ 3,736,144	\$ 4,046,520
	20%	\$ 3,222,732	\$ 3,533,107	\$ 3,843,485	\$ 4,153,858	\$ 4,464,233	\$ 4,774,609

Note: **Green** amounts indicate that demand exceeds supply



Table 52. Paris & Mirabeau Ave Demographics

New Orleans, LA 70122		Site Type: Drivetime		Drivetime: 2 minutes		ESRI	
Summary		2000		2008		2013	
Population		7,755		3,378		4,046	
Households		2,952		1,240		1,494	
Families		2,132		914		1,081	
Average Household Size		2.61		2.71		2.70	
Owner Occupied HUs		2,242		985		1,157	
Renter Occupied HUs		710		254		337	
Median Age		38.9		42.1		42.3	
Trends: 2008-2013 Annual Rate		Area		State		National	
Population		3.67%		0.95%		1.23%	
Households		3.80%		1.08%		1.26%	
Families		3.41%		0.92%		1.05%	
Owner HHs		3.27%		0.89%		1.07%	
Median Household Income		1.96%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number	Percent		Number	Percent	Number	Percent
< \$15,000	579	20.1%		187	15.1%	202	13.5%
\$15,000 - \$24,999	463	16.1%		160	12.9%	171	11.4%
\$25,000 - \$34,999	292	10.1%		145	11.7%	160	10.7%
\$35,000 - \$49,999	455	15.8%		187	15.1%	223	14.9%
\$50,000 - \$74,999	606	21.0%		323	26.0%	379	25.4%
\$75,000 - \$99,999	253	8.8%		126	10.2%	204	13.7%
\$100,000 - \$149,999	151	5.2%		77	6.2%	110	7.4%
\$150,000 - \$199,999	49	1.7%		24	1.9%	25	1.7%
\$200,000+	32	1.1%		11	0.9%	20	1.3%
Median Household Income	\$37,704			\$44,765		\$49,336	
Average Household Income	\$47,707			\$52,363		\$56,448	
Per Capita Income	\$18,346			\$19,309		\$20,934	

Table 52. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	479	6.2%	190	5.6%	241	6.0%
5 - 9	554	7.1%	202	6.0%	244	6.0%
10 - 14	553	7.1%	225	6.7%	262	6.5%
15 - 19	581	7.5%	223	6.6%	273	6.7%
20 - 24	442	5.7%	183	5.4%	231	5.7%
25 - 34	894	11.5%	376	11.1%	422	10.4%
35 - 44	1,059	13.7%	412	12.2%	491	12.1%
45 - 54	1,167	15.1%	490	14.5%	551	13.6%
55 - 64	804	10.4%	461	13.6%	612	15.1%
65 - 74	632	8.2%	308	9.1%	366	9.0%
75 - 84	469	6.0%	219	6.5%	237	5.9%
85+	119	1.5%	90	2.7%	116	2.9%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,395	18.0%	485	14.4%	633	15.6%
Black Alone	6,081	78.4%	2,774	82.1%	3,263	80.7%
American Indian Alone	9	0.1%	4	0.1%	5	0.1%
Asian Alone	42	0.5%	20	0.6%	23	0.6%
Pacific Islander Alone	2	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	64	0.8%	25	0.7%	31	0.8%
Two or More Races	162	2.1%	70	2.1%	89	2.2%
Hispanic Origin (Any Race)	231	3.0%	110	3.3%	142	3.5%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 53. Paris & Gentilly Retail Analysis

Summary Demographics:									
2008 Population Estimate:		1,010 (ESRI business analyst)		Project Area:					
Per Capita Income: \$		15,708 (ESRI business analyst)		Pedestrian Population with 1/4 mile					
Total Area Income: \$		15,865,080							
Portion Spent on Retail		47.71%(BLS CE 2007)							
Total Retail Expenditure \$		7,569,230							
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR	
COMPARISON GOODS SUBTOTAL	\$ 3,788,267	15%	30	2%	\$ 1,378,404	\$ 1,623,462	\$245,058	1.18	
APPAREL & SERVICES	\$ 581,616	15%	15	2%	\$ 149,435	\$ 828,379	\$678,944	5.54	
<i>MENS & BOYS CLOTHING</i>	\$ 120,067	15%	0	0%	\$ 18,010	\$ 348,164	\$330,154	19.33	
<i>WOMEN AND GIRLS</i>	\$ 234,655	15%	0	0%	\$ 35,198	\$ 134,937	\$99,739	3.83	
<i>CHILDREN'S CLOTHING</i>	\$ 36,522	15%	15	2%	\$ 9,384	\$ 180,697	\$171,313	19.26	
<i>SHOES</i>	\$ 126,458	15%	0	0%	\$ 18,969	\$ 84,823	\$65,855	4.47	
<i>OTHER APPAREL</i>	\$ 63,914	15%	0	0%	\$ 9,587	\$ 42,973	\$33,386	4.48	
FURNITURE & HOME EQUIPMENT	\$ 664,248	15%	60	2%	\$ 383,751	\$ 777,037	\$393,286	2.02	
<i>HOUSEHOLD TEXTILES</i>	\$ 37,892	15%	20	2%	\$ 11,086	\$ 83,445	\$72,359	7.53	
<i>FURNITURE</i>	\$ 92,219	15%	20	2%	\$ 26,981	\$ 66,207	\$39,226	2.45	
<i>HOME IMPROVEMENT</i>	\$ 435,984	15%	20	2%	\$ 127,558	\$ 883,469	\$755,911	6.93	
ENTERTAINMENT	\$ 503,550	15%	20	2%	\$ 147,326	\$ 99,465	\$47,861	0.68	
<i>AUDIO & VISUAL EQUIPMENT/SERVICES</i>	\$ 348,787	15%	20	2%	\$ 102,046	\$ 150,134	\$48,088	1.47	
CONVENIENCE GOODS SUBTOTAL	\$ 3,780,963	40%	50	2%	\$ 2,860,055	\$ 9,300,521	\$6,440,467	3.25	
<i>FOOD AT HOME (Including liquor)</i>	\$ 1,469,106	20%	20	2%	\$ 503,278	\$ 639,969	\$136,691	1.27	
<i>FOOD AWAY FROM HOME</i>	\$ 790,249	20%	20	2%	\$ 270,719	\$ 1,371,634	\$1,100,915	5.07	
<i>PERSONAL CARE</i>	\$ 189,002	20%	20	2%	\$ 64,747	\$ 2,498,999	\$2,434,251	38.60	
<i>AUTO (Gas, Wash & Other)</i>	\$ 912,599	20%	20	2%	\$ 312,633	\$ 3,376,580	\$3,063,948	10.80	

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 54. Comparison Shopping Scenarios: Paris & Gentilly

		Inflow Consumers (with a 2% draw rate)					
		10	20	30	40	50	60
Retention Rates	10%	\$ 648,881	\$ 918,936	\$ 1,188,991	\$ 1,459,045	\$ 1,729,100	\$ 1,999,155
	20%	\$ 1,027,708	\$ 1,297,763	\$ 1,567,817	\$ 1,837,872	\$ 2,107,927	\$ 2,377,981
	30%	\$ 1,406,535	\$ 1,676,589	\$ 1,946,644	\$ 2,216,699	\$ 2,486,754	\$ 2,756,808
	40%	\$ 1,785,362	\$ 2,055,416	\$ 2,325,471	\$ 2,595,526	\$ 2,865,580	\$ 3,135,635

Note: **Bold Green** amounts indicate that demand exceeds supply

Table 55. Convenience Shopping Scenarios: Paris & Gentilly

		Inflow Consumers (with a 2% draw rate)					
		50	100	150	200	250	300
Retention Rates	10%	\$ 1,725,766	\$ 3,073,436	\$ 4,421,106	\$ 5,768,776	\$ 7,116,445	\$ 8,464,115
	20%	\$ 2,103,862	\$ 3,451,532	\$ 4,799,202	\$ 6,146,872	\$ 7,494,542	\$ 8,842,212
	30%	\$ 2,481,959	\$ 3,829,628	\$ 5,177,298	\$ 6,524,968	\$ 7,872,638	\$ 9,220,308
	40%	\$ 2,860,055	\$ 4,207,725	\$ 5,555,395	\$ 6,903,064	\$ 8,250,734	\$ 9,598,404

Note: **Bold Green** amounts indicate that demand exceeds supply



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Table 56. Paris Ave & Gentilly Blvd Demographics

New Orleans, LA 70119		Site Type:	Radius	Radius:	0.25 mile		
Summary		2000		2008	2013		
Population		1,367		1,010	1,011		
Households		530		378	382		
Families		358		267	263		
Average Household Size		2.56		2.67	2.65		
Owner Occupied HUs		244		181	177		
Renter Occupied HUs		286		197	205		
Median Age		35.6		36.4	36.7		
Trends: 2008-2013 Annual Rate		Area		State	National		
Population		0.02%		0.95%	1.23%		
Households		0.21%		1.08%	1.26%		
Families		-0.30%		0.92%	1.05%		
Owner HHs		-0.45%		0.89%	1.07%		
Median Household Income		2.37%		1.87%	3.19%		
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	123	23.3%	73	19.3%	67	17.5%	
\$15,000 - \$24,999	117	22.1%	68	18.0%	56	14.6%	
\$25,000 - \$34,999	110	20.8%	78	20.6%	70	18.3%	
\$35,000 - \$49,999	95	18.0%	86	22.8%	87	22.7%	
\$50,000 - \$74,999	48	9.1%	42	11.1%	64	16.7%	
\$75,000 - \$99,999	20	3.8%	18	4.8%	20	5.2%	
\$100,000 - \$149,999	4	0.8%	8	2.1%	13	3.4%	
\$150,000 - \$199,999	0	0.0%	0	0.0%	1	0.3%	
\$200,000+	12	2.3%	5	1.3%	5	1.3%	
Median Household Income	\$26,762		\$30,908		\$34,756		
Average Household Income	\$47,311		\$42,442		\$45,915		
Per Capita Income	\$18,740		\$15,708		\$17,194		

Table 56. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	86	6.3%	64	6.3%	67	6.6%
5 - 9	114	8.3%	66	6.5%	68	6.7%
10 - 14	113	8.3%	78	7.7%	69	6.8%
15 - 19	116	8.5%	82	8.1%	77	7.6%
20 - 24	87	6.4%	69	6.8%	74	7.3%
25 - 34	157	11.5%	130	12.9%	131	13.0%
35 - 44	183	13.4%	118	11.7%	113	11.2%
45 - 54	210	15.4%	140	13.9%	134	13.3%
55 - 64	120	8.8%	131	13.0%	141	14.0%
65 - 74	105	7.7%	67	6.6%	75	7.4%
75 - 84	55	4.0%	47	4.7%	42	4.2%
85+	21	1.5%	18	1.8%	19	1.9%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	74	5.4%	42	4.2%	47	4.7%
Black Alone	1,269	92.8%	950	94.2%	946	93.7%
American Indian Alone	1	0.1%	1	0.1%	1	0.1%
Asian Alone	1	0.1%	1	0.1%	1	0.1%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	12	0.9%	8	0.8%	8	0.8%
Two or More Races	10	0.7%	7	0.7%	7	0.7%
Hispanic Origin (Any Race)	30	2.2%	22	2.2%	24	2.4%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 57. St. Bernard and Foy Retail Analysis

Summary Demographics:								
2008 Population Estimate:		1,487	(ESRI business analyst)		Project Area:			
Per Capita Income: \$		8,735	(ESRI business analyst)		Pedestrian Population with 1/4 mile			
Total Area Income: \$		12,988,945						
Portion Spent on Retail		76.43% (BLS CE 2007)						
Total Retail Expenditure \$		9,927,451						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/ SURPLUS FACTOR
CONVENIENCE GOODS SUBTOTAL	\$ 5,276,264	30%	40	2%	\$ 2,604,778	\$ 3,084,268	\$479,490	1.18
<i>FOOD AT HOME (Including liquor)</i>	\$ 2,320,982	30%	10	2%	\$ 808,676	\$ 1,298,880	\$490,204	1.61
<i>FOOD AWAY FROM HOME</i>	\$ 1,102,595	30%	10	2%	\$ 384,166	\$ 311,676	\$72,490	0.81
<i>DRUG</i>	\$ 582,039	30%	0	2%	\$ 174,612	\$ -	\$174,612	0.00
<i>PERSONAL CARE PRODUCTS & SERVICES (Beauty, Other health, dry cleaners, laundry, optical goods-average)</i>	\$ 260,278	30%	10	2%	\$ 90,686	\$ 187,910	\$97,224	2.07
<i>AUTO (Gas, Wash & Other)</i>	\$ 1,010,370	30%	10	2%	\$ 352,033	\$ 962,400	\$610,367	2.73

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population

Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area

Table 58. Convenience Shopping Scenarios: St. Bernard & Foy

Retention Rates	Inflow Consumers (with a 2% draw rate)					
	10	20	30	40	50	60
10%	\$ 783,101	\$ 1,038,576	\$ 1,294,051	\$ 1,549,525	\$ 1,805,000	\$ 2,060,475
20%	\$ 1,310,728	\$ 1,566,202	\$ 1,821,677	\$ 2,077,152	\$ 2,332,627	\$ 2,588,101
30%	\$ 1,838,355	\$ 2,093,828	\$ 2,349,303	\$ 2,604,779	\$ 2,860,254	\$ 3,115,727
40%	\$ 2,365,982	\$ 2,621,454	\$ 2,876,929	\$ 3,132,406	\$ 3,387,881	\$ 3,643,353

Note: **Bold Green** amounts indicate that demand exceeds supply



Table 59. Saint Bernard Ave & Foy St Demographics

New Orleans, LA 70122		Site Type:	Radius	Radius:	0.25 mile	ESRI	
Summary		2000		2008		2013	
Population		5,290		1,487		2,193	
Households		1,624		449		666	
Families		1,275		357		521	
Average Household Size		3.20		3.29		3.28	
Owner Occupied HUs		326		114		151	
Renter Occupied HUs		1,298		335		515	
Median Age		22.1		23.3		24.2	
Trends: 2008-2013 Annual Rate		Area		State		National	
Population		8.08%		0.95%		1.23%	
Households		8.20%		1.08%		1.26%	
Families		7.85%		0.92%		1.05%	
Owner HHs		5.78%		0.89%		1.07%	
Median Household Income		2.50%		1.87%		3.19%	
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	988	60.7%	217	48.4%	287	43.0%	
\$15,000 - \$24,999	243	14.9%	86	19.2%	135	20.2%	
\$25,000 - \$34,999	102	6.3%	35	7.8%	65	9.7%	
\$35,000 - \$49,999	111	6.8%	38	8.5%	56	8.4%	
\$50,000 - \$74,999	110	6.8%	48	10.7%	81	12.1%	
\$75,000 - \$99,999	30	1.8%	10	2.2%	21	3.1%	
\$100,000 - \$149,999	17	1.0%	8	1.8%	13	1.9%	
\$150,000 - \$199,999	9	0.6%	2	0.4%	3	0.4%	
\$200,000+	18	1.1%	4	0.9%	7	1.0%	
Median Household Income	\$10,982		\$15,567		\$17,615		
Average Household Income	\$22,421		\$28,226		\$30,779		
Per Capita Income	\$7,397		\$8,735		\$9,669		

Table 59. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	659	12.5%	186	12.5%	274	12.5%
5 - 9	773	14.6%	168	11.3%	243	11.1%
10 - 14	572	10.8%	164	11.0%	207	9.4%
15 - 19	464	8.8%	152	10.2%	207	9.4%
20 - 24	421	8.0%	112	7.5%	197	9.0%
25 - 34	689	13.0%	185	12.4%	251	11.4%
35 - 44	550	10.4%	152	10.2%	219	10.0%
45 - 54	476	9.0%	148	9.9%	230	10.5%
55 - 64	274	5.2%	101	6.8%	175	8.0%
65 - 74	194	3.7%	57	3.8%	93	4.2%
75 - 84	159	3.0%	42	2.8%	61	2.8%
85+	58	1.1%	22	1.5%	36	1.6%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	81	1.5%	25	1.7%	37	1.7%
Black Alone	5,173	97.8%	1,452	97.6%	2,138	97.5%
American Indian Alone	2	0.0%	0	0.0%	0	0.0%
Asian Alone	5	0.1%	3	0.2%	3	0.1%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	3	0.1%	1	0.1%	2	0.1%
Two or More Races	27	0.5%	7	0.5%	13	0.6%
Hispanic Origin (Any Race)	41	0.8%	12	0.8%	20	0.9%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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Table 60. St. Roch and Prentiss Retail Analysis

Summary Demographics:								
2008 Population Estimate:		508	(ESRI business analyst)			Project Area:		
Per Capita Income: \$		18,124	(ESRI business analyst)			Pedestrian Population with 1/4 mile		
Total Area Income: \$		9,206,992						
Portion Spent on Retail		42.59% (BLS CE 2007)						
Total Retail Expenditure \$		3,921,258						
RETAIL CATEGORY	EXPENDITURE POTENTIAL	RETENTION RATES	INFLOW NUMBERS	DRAW RATE	DEMAND POTENTIAL	RETAIL SUPPLY	RETAIL GAP	LEAKAGE/SURPLUS FACTOR
<i>HOME IMPROVEMENT</i> <i>(Floor Coverings, Materials, Hardware, cleaning)</i>	\$ 260,164	20%	100	4%	\$ 789,504	\$ 840,650	\$51,145	1.06

Note: Inflow numbers are daily person counts, which assumed to have the same per capita income as the resident population
 Draw Rate is the percentage of outsiders' purchases by category, which are made in the project area



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Table 61. Saint Roch Ave & Prentiss Ave Demographics

New Orleans, LA 70122		Site Type: Radius		Radius: 0.25 mile			
Summary		2000		2008	2013		
Population		1,306		508	663		
Households		513		191	252		
Families		358		136	176		
Average Household Size		2.54		2.66	2.63		
Owner Occupied HUs		393		150	195		
Renter Occupied HUs		120		41	57		
Median Age		37.9		38.8	39.6		
Trends: 2008-2013 Annual Rate		Area		State	National		
Population		5.47%		0.95%	1.23%		
Households		5.70%		1.08%	1.26%		
Families		5.29%		0.92%	1.05%		
Owner HHs		5.39%		0.89%	1.07%		
Median Household Income		2.23%		1.87%	3.19%		
Households by Income		2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent	
< \$15,000	112	21.9%	32	16.8%	38	15.1%	
\$15,000 - \$24,999	61	11.9%	19	9.9%	22	8.7%	
\$25,000 - \$34,999	55	10.7%	20	10.5%	21	8.3%	
\$35,000 - \$49,999	120	23.4%	33	17.3%	35	13.9%	
\$50,000 - \$74,999	96	18.8%	52	27.2%	80	31.7%	
\$75,000 - \$99,999	62	12.1%	23	12.0%	30	11.9%	
\$100,000 - \$149,999	0	0.0%	11	5.8%	24	9.5%	
\$150,000 - \$199,999	5	1.0%	1	0.5%	1	0.4%	
\$200,000+	1	0.2%	0	0.0%	1	0.4%	
Median Household Income	\$40,000		\$47,006		\$52,480		
Average Household Income	\$41,381		\$48,499		\$54,613		
Per Capita Income	\$15,799		\$18,124		\$20,634		

Table 61. Continued...

Population by Age	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	92	7.0%	34	6.7%	43	6.5%
5 - 9	77	5.9%	35	6.9%	44	6.6%
10 - 14	93	7.1%	37	7.3%	46	6.9%
15 - 19	89	6.8%	31	6.1%	45	6.8%
20 - 24	84	6.4%	29	5.7%	39	5.9%
25 - 34	162	12.4%	65	12.8%	77	11.6%
35 - 44	189	14.4%	68	13.4%	81	12.2%
45 - 54	217	16.6%	73	14.3%	99	15.0%
55 - 64	105	8.0%	68	13.4%	96	14.5%
65 - 74	88	6.7%	30	5.9%	49	7.4%
75 - 84	89	6.8%	25	4.9%	26	3.9%
85+	26	2.0%	14	2.8%	17	2.6%

Race and Ethnicity	2000		2008		2013	
	Number	Percent	Number	Percent	Number	Percent
White Alone	345	26.4%	108	21.3%	156	23.5%
Black Alone	919	70.4%	385	75.8%	488	73.5%
American Indian Alone	1	0.1%	0	0.0%	0	0.0%
Asian Alone	5	0.4%	2	0.4%	2	0.3%
Pacific Islander Alone	1	0.1%	0	0.0%	0	0.0%
Some Other Race Alone	21	1.6%	8	1.6%	11	1.7%
Two or More Races	14	1.1%	5	1.0%	7	1.1%
Hispanic Origin (Any Race)	74	5.7%	35	6.9%	50	7.5%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

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GLOSSARY

AADT, Annual Average Daily Traffic is the total volume of vehicle traffic of a highway or road for a year divided by 365 days.

Blight is the deteriorated condition of buildings, in which growth is impaired and progress is impeded.

Big Box is a large retail chain store, having a box-like structure.

Brownfield is a tract of land that has been developed for industrial purposes, polluted, and then abandoned.

Commerce is the exchange or buying and selling of commodities.

Commercial retail space is occupied by or engaged in commerce.

Comparison Shopping is a type of shopping that involves personal gratification: comparing goods between different shops is part of the process of choice, which made on the bases of suitability, quality, price and style.

Consumer Expenditure is the amount consumers spend on goods and services.

Consumer Expenditure Survey is a program consisting of two surveys, the quarterly Interview Survey and the Diary Survey, that provide information on the buying habits of American consumers, including data on their expenditures, income, and consumer unit (families and single consumers) characteristics. The U.S. Census Bureau collects the survey data for the Bureau of Labor Statistics.

Convenience Shopping is a type of shopping that involves goods, which the consumer purchases frequently, immediately and with a minimum of effort.

Demand is the quantity of a commodity or service wanted at a specified price and time.

Demographic is the idea of relating to the dynamic balance of a population especially with regard to density and capacity for expansion or decline.

District shopping center is the inclusion of smaller centers with more convenience goods; emphasizing ease of access by automobile and sufficient space reserved for free parking.

Dollar and Cents of Shopping Centers is a publication by the Urban Land Institute, which includes comprehensive income and expense data for shopping centers and tenants organized by center type, age, and region. It also contains tables on open-air and enclosed centers organized by size, and features more detailed income and expense categories.

Draw Rate is the percentage of a *nonlocal consumer's* spending for certain goods *within* the local study area.

Eminent domain is the governmental right to take private property for public usage by virtue of the superior dominion of the sovereign power over all lands within a defined jurisdiction.

Façade is the front of a building or any face of a building given special architectural treatment.

Financing tool is a tool used for the instance of raising or providing funds.

Free-standing shopping center is an independent, stand-alone retailer, which is not a part of a shopping center.

Greenspace is a land use planning and conservation term used to describe protected areas of undeveloped landscape.

HBCU, Historically Black College or University is an institution of higher education in that were established before 1964 with the intention of serving the black community.

Inflow is the number of consumers that are nonresidents of a given area who spend within its boundaries. Inflow rate measures the number of consumers who enter the local market on a daily basis.

Lifestyle center is a shopping center or mixed-used development that combines the traditional retail functions of a shopping mall, but with leisure amenities oriented towards upscale consumers.

Market is the available supply of or potential demand for specified goods or services.

Mixed-use development is the practice of allowing more than one type of use in a building or set of buildings.

Neighborhood shopping center is a small-scale shopping center with a focus on convenience goods for the surrounding community; typically anchored by a grocery store or discount retailer.

Occupied is the act of residing in a space, as an owner or tenant.

Open-air shopping center is smaller in size than a regional mall and focused on bringing the shopping experience outdoors.

Pedestrian shopping center is a small-scale, locally serving clusters of businesses that typically feature establishments offering convenience goods.

Regional shopping center focuses on large and interdependent clusters of shopping centers; clusters are collectively very large, diverse, and mixed among many different types of comparison and convenience retail.

Residential space is a property, which is zoned for single-family housing, multi-family apartments, townhouses, condominiums, and/or co-ops.

Retail is the industry of selling commodities or goods in small quantities to consumers.

Retail Analysis is the study of sales generated by a good or service to determine the reasons for success or failure, and how sales performance can be improved.

Retail Leakage is a state in which the potential demand for goods and services exceeds the supply of those same goods and services. Therefore, it is possible in this scenario that retail dollars “leak” outside of the given area, since supply is not keeping up with demand. This term can also be understood as the ratio of retail supply to retail demand when the resulting number is below 1.00.

Retail Surplus is a state in which the current supply of retail goods and services exceeds the potential demand for those same goods and services. When supply exceeds demand, and there is a surplus, the utilization of the existing square feet of retail is ultimately questioned. Certain retailers may be successful with sales per square foot than the national average because of lower overhead cost. This term can also be understood as the ratio of retail supply to retail demand when the resulting number is above 1.00.

Retention Rate is the percent of a *local consumer’s* spending (for certain goods) *within* the local study area. If the residents of the given area spend 36 percent of their collective income on retail, and 25 percent of this amount is spent locally, then the retention rate is equal to 25 percent.

Shopping center is a group of retail stores and service establishments usually with ample parking facilities and typically designed to serve a community or neighborhood.

Square Footage is the area of a space, measured in square feet, of something for sale or rent.

Streetscape is the appearance or view of a street.

Supply is the total amount of a product, good, or service available for purchase at any specified price.

Trade Area is the geography from which approximately 60 – 80 percent of your customers’ sales originate.

Unoccupied is a retail establishment that is currently not being used; it is uninhabited.

Zoning Overlay District is a regulatory district which identifies special provisions in addition to underlying base zoning