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Neighborhood Retail Commercial Study: Cleveland, Ohio

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EXECUTIVE SUMMARY

INTRODUCTION

While decent affordable housing is the foundation of urban neighborhood economic revitalization, retail commercial development is nevertheless a pressing development issue facing urban neighborhoods. Retail opportunity in urban neighborhoods has been decimated over many years as population has declined, and competing commercial centers have blossomed, with retail substantially overbuilt in the NE Ohio region overall. The result in urban neighborhoods has been low-density, deteriorating retail establishments spread out over long commercial strips that are punctuated by chain dollar stores, drugstores and convenience. And yet, retail commercial development holds opportunities for local community resident investment and entrepreneurship, training of youth in entry-level jobs, and creation of vibrant opportunities for resident and business interaction.

This project was defined to answer some critical questions about retail development in urban neighborhoods.

- What are the typical urban shopping patterns, as opposed to the suburban patterns that are used in standard market studies?
- How do households with varying purchasing power drive the economic demand in their neighborhoods – and what role do outside shoppers play?
- In the shadow of significant general merchandise and big-box retail development that has oversupplied our region, what could and should be the "critical mass" of retail development in a typical neighborhood main street that can thrive, and neighborhood developers and merchants' associations can strive for?

STUDY APPROACH AND METHOD

To study these questions, six typical neighborhoods in Cleveland were selected for analysis. The project was framed to provide real, targeted data suitable for analysis on the neighborhood level, and also for neighborhood-to-neighborhood comparison. The steps included:

1. Literature review. Literature review was completed on the subjects of urban retail; retail analysis methods; obsolescence; and Cleveland planning surrounding retail commercial development.

2. Neighborhood Selection. Six urban neighborhoods were selected for geographic, population and economic diversity, and included:

- Slavic Village
- Union-Miles
- Buckeye-Shaker Square-Larchmere
- Westown
- Detroit-Shoreway
- Clark-Fulton

3. Preliminary key informants interviews. 36 key informants in the CDC, banking and development communities were interviewed.
4. Visitors' surveys. 773 visitors surveys were collected in person at 13 nieghborhood events in the six neighborhoods in the summer of 2015.
5. Merchant interviews. 23 merchants in the six targeted neighborhoods were interviewed.
6. Gravity model market delineation. A gravity model boundary was outlined for each of the six neighborhoods.
7. Inventory. A detailed inventory of retail space in the six neighborhood primary market areas, along with their competitors.
8. Market area data collection. Demographic data was collected for the delineated primary market area for each of the six target neighborhoods, as well as for 1 and 3-mile radius areas.
9. Demand Model and Retail Niche analysis. A demand model was developed using household expenditure data, neighborhood capture rates generated by the survey, neighborhood leakage rates (100% capture), sales per square foot and typical establishment size using both merchants' surveys and national data. A retail subcategory niche analysis was then performed, using capture rates generated through the visitors' surveys.
10. Analysis and conclusions. The data and maps collected were analyzed in light of the study questions outlined above, and conclusions drawn.
11. Data refinement and followup discussions. Additional work was done in the summer of 2016 to field verify inventory data, and look more closely at obsolescence.

FINDINGS

The tables below summarize the retail categories and patterns, and niche analysis results, for the six neighborhoods. A final table shows a comparison of overall metrics relating the quantity of retail space to neighborhood population, households, and buying power.

Key findings include:

- There is a higher level of neighborhood loyalty to convenient local shopping than might be expected, perhaps a reflection of the high proportion of households without access to a car
- There is sizeable leakage (based on 100% capture rate) in multiple categories
- Beauty salons and barber shops, auto repair, grocery, convenience, and full service restaurants showed the greatest strength across all neighborhoods.
- There was no apparent pattern of retail square footage quantity in relation to population, households or neighborhood Primary Market Area purchasing power. This underscores the need for continued focus on housing, critical mass in close proximity, strengthening neighborhood anchor assets, both commercial and non-commercial, investing in safety and customer comfort features such as parking, transit stops, and lighting, and promoting business success strategies in order to support viable commercial retail main streets in the long term.

- Strong local businesses are characterized by many factors, but the most important are the merchant's vision, capitalization, market savvy, and collaboration with other merchants.
- The urban retail market can be characterized as consisting of one or more of four possible submarkets:
  - Neighborhood residents seeking affordable, convenient daily goods and services
  - Neighborhood residents seeking unique goods and services
  - Outside visitors seeking unique goods and services
  - Neighborhood employees seeking meals and convenient daily goods and services

RETAIL DINING AND SHOPPING – Buckeye-Shaker Square, Clark-Fulton, Detroit-Shoreway

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	18,919	12,612	(11,299)	(12,933)	(6,081)	(9,512)
Catering	7,722	5,148	2,000	1,334	3,151	1,750
Restaurants - full service	32,043	2,040	367	(1,764)	(2,866)	(14,547)
Restaurants - limited service	42,102	27,394	(8,991)	(16,693)	(1,102)	(11,210)
Total						
RETAIL SHOPPING						
Auto Parts	1,435	17,941	(54,216)	(51,752)	(6,173)	(500)
Beer/wine/liquor stores	2,375	6,986	(1,621)	(390)	594	2,375
Books/Music	(6,560)	(6,525)	(2,041)	(1,600)	815	1,181
Clothing/Shoes	3,134	37,002	(6,130)	3,500	(3,607)	9,593
Computer/electronics/phone	(557)	12,431	(12,426)	(9,061)	(4,703)	57
Convenience	(6,916)	(6,395)	(41,510)	(41,375)	(37,691)	(37,514)
Drugstores	2,201	21,672	(13,736)	(9,590)	(11,642)	(4,932)
Florists	(1,316)	(662)	11	217	29	285
Gas Stations/Convenience	17,480	22,875	(9,209)	(7,812)	3,537	5,372
General Merchandise	32,737	123,680	(8,591)	10,774	2,013	33,357
Gifts/novelties	102	927	(1,206)	(671)	248	825
Grocery	(631)	34,056	(20,643)	(11,385)	(8,833)	4,569
Hardware/Home/Garden	6,269	58,293	(1,719)	12,071	3,131	18,968
Health/Beauty	2,182	8,082	(1,562)	(306)	(1,786)	248
Home Furnishings	225	15,312	(3,000)	1,709	(6,500)	(320)
Household appliances	481	2,831	(8,200)	(7,467)	(1,800)	(837)
Jewelry	691	3,140	(859)	(86)	(893)	68
Luggage/leather goods	46	257	7	67	(3,695)	(3,612)
Musical instruments	299	906	(960)	(765)	15	308
Office Supplies/stationery	622	2,591	222	671	(4,294)	(3,519)
Other retail	(7,851)	(1,410)	(3,217)	(1,510)	(14,514)	(12,553)
Specialty foods	1,357	3,365	(4,259)	(3,569)	(9,354)	(8,716)
Sporting goods/outdoors/bikes	1,186	6,590	171	1,707	(1,866)	241
Toy/Craft/Hobby	(2,731)	(1,582)	(446)	(81)	17	550
Used merchandise	(23,716)	(19,219)	(8,292)	(6,420)	(16,154)	(13,970)

Source: CSU CCPD analysis

RETAIL DINING AND SHOPPING – Slavic Village, Union-Miles, Westown

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	(9,100)	(10,474)	(2,133)	(610)	732	(1,091)
Catering	2,163	1,603	1,864	2,486	574	(14,815)
Restaurants - full service	11,723	3,739	6,428	9,465	(20,936)	(20,031)
Restaurants - limited service	(20,814)	(22,762)	3,069	8,660	2,870	2,126
Total						
RETAIL SHOPPING						
Auto Parts	(10,611)	(7,260)	(14,574)	(8,337)	(6,610)	(2,090)
Beer/wine/liquor stores	(3,934)	(2,825)	(15,617)	(13,627)	2,251	2,886
Books/Music	681	1,082	207	778	301	1,435
Clothing/Shoes	(11,250)	(2,893)	3,286	18,443	(18,002)	(4,356)
Computer/electronics/phone	(11,687)	(8,228)	(9,974)	(3,982)	(21,095)	(15,850)
Convenience	(41,051)	(40,889)	(41,544)	(41,292)	(26,726)	(26,511)
Drugstores	(7,932)	(3,697)	(8,794)	478	(13,019)	(9,824)
Florists	(3,327)	(3,139)	89	405	55	346
Gas Stations/Convenience	(7,432)	(5,753)	(4,480)	(1,875)	(3,037)	(809)
General Merchandise	(31,728)	(11,949)	(18,257)	25,053	(46,084)	(31,163)
Gifts/novelties	(1,865)	(1,745)	(19,927)	(19,528)	481	1,002
Grocery	(54,286)	(45,942)	10,404	25,376	(9,619)	(4,844)
Hardware/Home/Garden	5,956	17,632	5,686	27,009	1,894	17,884
Health/Beauty	(8,527)	(7,244)	(6,807)	(3,997)	(2,880)	(1,912)
Home Furnishings	(1,799)	2,558	(1,722)	6,177	(17,004)	(10,473)
Household appliances	(6,497)	(5,819)	(2,163)	(933)	(4,448)	(3,431)
Jewelry	274	978	334	1,516	(2,792)	(1,703)
Luggage/leather goods	28	80	30	124	(1,179)	(1,094)
Musical instruments	79	282	96	437	60	374
Office Supplies/stationery	169	807	263	1,251	407	1,070
Other retail	(2,514)	(1,068)	(424)	2,217	(7,786)	(5,806)
Specialty foods	(5,307)	(4,641)	(589)	908	(20,336)	(19,597)
Sporting goods/outdoors/bikes	(532)	801	764	3,182	544	2,722
Toy/Craft/Hobby	111	504	133	781	167	668
Used merchandise	(3,800)	(2,700)	(794)	1,378	(5,739)	(3,483)

Source: CSU CCPD analysis

CONSUMER SERVICES – Buckeye-Shaker Square, Clark-Fulton, Detroit-Shoreway

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	30	110	(51,245)	(51,031)	(22,820)	(22,147)
Auto repair/services	(16,471)	(14,573)	(9,202)	(6,868)	(4,774)	(1,395)
Banks	(1,795)	6,949	(6,998)	(6,980)	5	26
Bowling	34	77	51	340	134	446
Cinemas	(19,134)	(18,689)	(540)	(169)	677	1,353
Dental offices	2,707	3,980	(3,017)	(2,628)	(1,462)	(900)
Financial Services/Insurance	(1,100)	356	(4,404)	(4,334)	(1,460)	(1,348)
Fitness/Health/Dance/martial a	(979)	(653)	(4,279)	(4,087)	(7,583)	(7,320)
Funeral Svcs	(2,404)	(1,877)	(6,228)	(6,076)	(5,927)	(5,706)
Laundromat/Dry Cleaning	(5,006)	(4,436)	(746)	1,468	436	3,632
Legal Services	3,346	10,184	(1,297)	(1,292)	3	10
Locksmiths	(1,190)	(1,169)	11	29	10	37
Optometrists	157	463	(1,162)	(1,080)	39	157
Other Services	(9,778)	(6,489)	(3,796)	(2,861)	(8,318)	(7,036)
Pet Stores/Services	(431)	1,063	(2,612)	(2,214)	192	769
Photography Services	(1,949)	(1,714)	(993)	(926)	(9,994)	(9,903)
Radio/Television/Electronic svc	65	242	(675)	(637)	21	82
Real Estate Services	(5,153)	(1,294)	122	1,219	(204)	1,300
Salon/barber/unisex	(29,002)	(27,340)	(16,364)	(16,010)	(7,549)	(6,976)
Shoe repair	7	21	2	5	2	7
Tailoring/alteration	(883)	(849)	(1,196)	(1,187)	4	17
Tax Preparation/Accounting	(134)	1,546	(4,789)	(4,341)	(3,584)	(2,934)
Travel Services	94	525	14	136	11	178

Source: CSU CCPD analysis

CONSUMER SERVICES – Slavic Village, Union-Miles, Westown

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	1,259	1,285	(35,419)	(34,542)	(45,455)	(46,171)
Auto repair/services	(17,279)	(15,176)	(3,377)	397	(11,993)	(10,789)
Banks	(34,586)	(34,575)	16	37	10	32
Bowling	343	408	418	633	260	542
Cinemas	(286)	(261)	1,576	1,922	(9,985)	(10,906)
Dental offices	(11,509)	(11,159)	(563)	65	(6,339)	(6,139)
Financial Services/Insurance	68	139	(3,940)	(3,784)	(3,369)	(3,315)
Fitness/Health/Dance/martial a	(26,610)	(26,444)	(4,405)	(4,103)	(13,932)	(13,660)
Funeral Svcs	(8,468)	(8,331)	(12,329)	(12,083)	(4,322)	(4,243)
Laundromat/Dry Cleaning	(2,172)	(1,174)	2,476	5,159	565	3,213
Legal Services	5	10	6	15	(2,790)	(2,787)
Locksmiths	17	34	15	53	32	46
Optometrists	(2,229)	(2,156)	92	223	(4,201)	(4,159)
Other Services	(4,263)	(3,451)	465	1,937	(17,203)	(15,877)
Pet Stores/Services	(1,055)	(696)	448	1,093	729	935
Photography Services	31	89	(867)	(762)	24	118
Radio/Television/Electronic svc	37	75	33	117	71	100
Real Estate Services	(917)	35	545	2,272	389	1,943
Salon/barber/unisex	(7,203)	(6,842)	(25,292)	(24,501)	(28,933)	(28,660)
Shoe repair	3	6	4	10	7	9
Tailoring/alteration	8	16	(490)	(475)	17	21
Tax Preparation/Accounting	(14,712)	(14,308)	(696)	29	(7,088)	(6,857)
Travel Services	(4,043)	(3,937)	61	253	(1,657)	(1,483)

Source: CSU CCPD analysis

SQUARE FOOTAGE METRICS COMPARISON

SF/1000 population					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
16,623	40,571	35,901	41,312	18,382	47,738
SF/100 Households					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
3,434	10,730	8,018	10,332	4,539	12,106
SF/$100,000 Overall PMA buying power					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
53	352	219	395	144	299

Source: CSU CCPD based on inventory

CONCLUSIONS AND NEXT STEPS

While no pattern was found in the relationship between successful square footage and neighborhood buying power, several other key lessons were learned through this study. Consolidation must be based on strategic investment rather than overall square footage, focusing on existing clusters of strong business(es) and expanding gradually outward. People have a higher loyalty to shopping in their neighborhood than was anticipated. Urban neighborhoods have substantial buying power which leaks beyond their borders, providing potential for retail growth. Strong local businesses across neighborhoods include full-service dining, hair/beauty/barber salons, auto repair and parts, convenience, grocery and dollar stores (general merchandise). Finally, there are four distinct markets in urban neighborhoods which must be addressed separately in market analysis. This information can be used to help merchants develop a strong awareness of their customers' needs, their competitors, and their role in strengthening and revitalizing their neighborhoods.

This study generated many additional questions which could be researched further:

- Refine the definition of what is vacant and what is repurposable using building condition data and field survey
- Refine neighborhood Primary Market Area boundaries and capture rates through additional visitors' surveys and visitor interviews
- Obtain better information from merchants or other sources on typical business square footage, employment, and sales per square foot for specific categories
- Inventory upper floor businesses and understand their role in local retail capacity
- Expand the study to incorporate more neighborhoods with varying conditions
- Separate out and study in more detail the role of neighborhood employees in retail demand

1. INTRODUCTION

While decent affordable housing is the foundation of urban neighborhood economic revitalization, retail commercial development is nevertheless a pressing development issue facing urban neighborhoods in Cleveland. Retail development in urban neighborhoods has been decimated over many years as population has declined, and competing commercial centers have blossomed, with retail substantially overbuilt in the NE Ohio region, as is typical of many legacy cities. The result has been low-density, deteriorating retail establishments spread out over long commercial strips that are punctuated by chain dollar stores, drugstores and convenience.   Residents and development corporations complain of a lack of selection and quality available, while business investment is difficult to obtain. And yet, neighborhood retail commercial development holds opportunities for local community resident investment and entrepreneurship, training of youth in entry-level jobs, and creation of vibrant opportunities for resident and business interaction. A strong retail center can begin to attract outside customers, a key to growth for the neighborhood economy.

This project was defined to study some important questions about retail development in urban neighborhoods. What are the typical urban shopping patterns, as opposed to the suburban patterns that are typically used in standard market studies? How do households with varying purchasing power drive the economic demand in their neighborhoods – and what role do regional shoppers play, alongside neighborhood shoppers? In the shadow of significant general merchandise and big-box retail development that has oversupplied our region, what could and should be the "critical mass" of retail development in a typical neighborhood main street that can thrive, and neighborhood developers and merchants' associations can strive for?

To address these questions, six typical neighborhoods in Cleveland were selected for analysis, including Detroit-Shoreway, Westown, Clark-Fulton, Buckeye-Shaker Square, Slavic Village, and Union-Miles. Downtown, Tremont, Ohio City and University Circle were specifically not selected due to significant external forces driving their development, which is probably not typical for all neighborhoods in Cleveland.

The project was framed to provide a retail market analysis for each neighborhood, constructed with on-the-ground data collected from neighborhood visitors and merchants, key informants, and a detailed inventory of retail businesses. Conclusions were drawn on each neighborhood, as well as on the neighborhoods in comparison to each other.

2. STUDY APPROACH AND METHODOLOGY

Study Objectives

Specific study questions addressed included:

- Address the question of realistic retail capacity and "critical mass" of retail in urban neighborhoods, with a focus on locally owned independent retail businesses
- Understand the relationship of local and regional markets in urban neighborhoods, and resident/worker markets
- Refine a method for analyzing the local retail market in urban neighborhoods, in contrast to chain/mainstream retail market analysis
- Gather information from visitors and merchants on the local shopping experience for use by CDCs and others working on retail economic development

Study Approach

The study approach attempted to compare traditional retail trade area and market information for six typical Cleveland neighborhoods, in order to understand patterns across them. A gravity model was used to define each neighborhood's trade area in relation to the primary shopping centers in the City. In addition, the study attempted to answer some key questions about the urban shopper through an extensive visitors' survey that was administered across the City at community events throughout the summer of 2015. Retail square footage patterns were also compared across neighborhoods, and typical values for sales per square foot, business size, and employment were examined.

Finally, the researcher was interested in a few additional key questions, including the range and type of data available for urban neighborhood market studies of this nature; the history and context of neighborhood retail development in Cleveland; the potential for reuse of urban retail spaces; and the range of methods used by practitioners for retail market analysis. These questions were answered through a background literature review.

The study overall was informed by interviews with key stakeholders and experts, representing local developers and property owners, retailers, banks, neighborhood leaders, community development corporations, intermediary nonprofits, neighborhood planners, and academics.

Methodology

The following is a summary of the major steps in the study. The Appendices include detailed information.

1. Background and Literature Review. A literature review was conducted to understand the evolution and importance of retail markets in urban neighborhoods and Cleveland specifically, and the context within which a method was defined and used to address market capacity questions. Additional literature review questions addressed definitions for obsolete retail space, and current studies applying retail market principles in urban neighborhoods. This review is available as a separate document.

2. **Selection of urban neighborhoods.** Six urban neighborhoods were refined from an original group of ten, based on recommendations of key informants interviewed early in the study. Neighborhoods were selected for geographic, population and economic diversity. The four most vibrant Cleveland neighborhoods (Downtown/Flats, Ohio City, Tremont, and University Circle) were excluded in order to focus on typical neighborhoods without major externalities.

3. **Preliminary key informants interviews.** Key informants in the CDC, banking and development communities were interviewed early in the study to help define study objectives and focus areas, and again later in the study to obtain feedback on early findings of data analysis.

4. **Visitors' surveys.** A visitors' survey, addressing questions related to market definition, leakage, capture, respondent zip code, and ideas for improving the retail environment were collected in person at 13 neighborhood events in the six neighborhoods during the summer of 2015. 773 surveys were collected. In addition, zip code data was analyzed to understand the range of visitors at neighborhood events. The survey was exempted from detailed review by the CSU IRB.

5. **Merchants interviews.** 23 merchants in the six targeted neighborhoods were interviewed, with a standard set of questions related to market definition, useful and obsolete retail space, employment, and ideas for improving the retail environment. This survey was also exempted from detailed review by the CSU IRB. In addition, two merchants provided zip code data on their customers which was analyzed and mapped.

6. **Gravity model market delineation.** GIS tools were used to identify competitor shopping areas and the mean center of retail activity in each neighborhood. This information was used to outline a gravity model boundary for each of the six neighborhoods.

7. **Inventory.** An inventory of retail space in the six neighborhood primary market areas was done using data from Reference USA, CoStar.com, and the Western Reserve Land Conservancy's Thriving Communities Institute, supplemented by Google Street View and Google Earth, and limited field windshield survey. Overall square footage data was also collected for competitor shopping centers. First floor square footages were measured, and retail businesses were classified by category.

8. **Market area data collection.** Demographic data was collected for the delineated primary market area for each of the six target neighborhoods. This was compared to 1, 2 and 3-mile radius information collected from CoStar.

9. **Retail Niche analysis.** A retail subcategory niche analysis was performed, using capture rates generated through the visitors' surveys.

10. **Analysis and conclusions.** The data and maps collected were analyzed in light of the study questions outlined above, and conclusions drawn.

11. **Data refinement and followup discussions.** Additional work was done in the summer of 2016 to field verify inventory data, and look more closely at building condition and obsolescence.

3. KEY POINTS: BACKGROUND LITERATURE AND DATA REVIEW

Urban neighborhood retail development in Cleveland. As noted in the literature, retail development in urban neighborhoods represents an ongoing opportunity to fill demand for greater variety and quality of goods. Retail in general is overbuilt in the Cleveland area, but where housing is being developed in urban neighborhoods, it is possible that retail demand could expand. Retail in Cleveland urban neighborhoods is strongly characterized by the basic fact of population loss. Main streets that once provided goods and services for a sizeable population are now serving a much smaller population. Since this natural "downsizing" has happened gradually over time, the successful businesses that remain are spread out along commercial streets, interspersed with newer chain stores and vacant, repurposed and/or demolished spaces.

Both Cleveland's City plans of 1991 and 2007, and a recent study on "Right-Sizing Cleveland", emphasize the need for consolidation. City planners, activists, and historic preservationists alike recommend consolidation, infill, and increased density in target areas to create strong centers from which further investment and restoration can grow. Additional recommendations to support retail revitalization focus on historic preservation, strengthening neighborhood housing, and strengthening local businesses. The primary elements of a successful retail environment include providing a unique and high quality shopping experience, good business management, tailoring inventory and services to the customer, and managing marketing and customer relationships well.

The review of the literature and context for retail redevelopment indicates that it is important to restore good retail diversity serving Cleveland neighborhoods. Local retail shopping provides the opportunity for wealth building, if local residents can own stores and benefit from their neighbors' patronage. A vibrant retail cluster, even if small, provides places for people to meet and greet and connect with each other. People with limited mobility due to age, disability, lack of an automobile, or other circumstances, benefit from proximity of banks, drugstores, grocery, restaurants, and other stores meeting basic needs. And businesses based in a neighborhood, especially banks and employers, will continue to invest in and strengthen the neighborhood's economy over time. This is a difficult challenge, as obtaining financial investment in urban neighborhoods can be limited.

Obsolescence. The concept of obsolescence was born with the 20th century real estate market. Recognizing that building needs and land values changed quickly in fast-developing urban areas, real estate leaders worked with government taxation experts to influence the tax code in ways that had a profound effect on architecture, development and real estate investment. The idea that a building could depreciate fully over 30 years, becoming "obsolete" and of greatly reduced value in that time period, facilitated speculation, constant renewal of construction, and long term tax benefits to real estate owners, creating a fast-paced market for newer and better real estate investment. A counter-movement to protect older structures for their historic value led to the historic preservation movement, and ultimately the sustainability movement. The impact on urban neighborhoods is seen in the preference for mainstream real estate investment to overlook older buildings, for inexpensive “chain store” construction that deteriorates rapidly, and for the urban consumer and developer to prefer newer and regularly renovated commercial environments – while cherishing restored historic structures partly for their rarity.

Urban retail market analysis method. A review of the literature demonstrates a range of methods in use in academic and practical applications. Typically a trade area is defined, either by distance, time, gravity model, interview, or judgment, and demand and supply data collected within the trade area. Some academics have experimented over the years with statistical models for allocating consumer shopping to various locations within a region. Newer GIS models and network-based models take “fuzzy logic” into account. However, these are limited in their application to real, on the ground neighborhoods and the decisions made by property owners, developers, and finance specialists in exploring opportunities for investment and development. The gold standard remains the definition of trade areas, capture rates, demographic data, and niche leakage analyses. The greater the extent that the inputs to these trade models are based on real neighborhood information (survey, interview, inventory and field review), the more accurate and relevant the projections are likely to be. There does not appear to be a substitute for the extensive labor of inventory and survey.

Key informant interviews. The input of key informants ranged widely depending on the role and organization of the informant. The biggest lessons learned were that the specifics of local neighborhoods – the merchants, anchor institutions, Council leadership, and other stakeholders – were critical in determining opportunity. Business success is highly variable, depending on the commitment, expertise, vision and capacity of the merchant. There are no broad conclusions that can be drawn about location, size, or other details of retail space – results are unpredictable and need to be discussed and evaluated on a case-by-case basis.

4. SIX CLEVELAND NEIGHBORHOODS

The six Cleveland neighborhoods were selected because they represent typical urban neighborhoods in Cleveland with a range of economic and neighborhood conditions, and that are in various stages of redevelopment. Each one has its distinctive potential, including historic and architectural assets, sense of community, and unique ethnic history and population. However, none has the current economic force of revitalization that is occurring in University Circle, Tremont, Ohio City, or downtown. They were selected because studying them might indicate possible ways forward for all Cleveland neighborhoods.

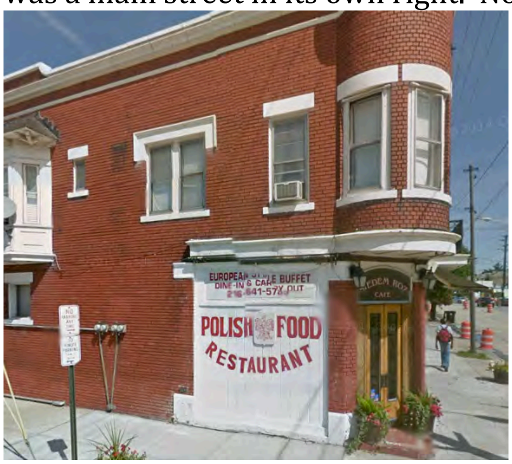
Buckeye-Shaker Square. The Buckeye-Shaker Square neighborhood is comprised of three distinct shopping districts. Shaker Square is central to the neighborhood, and is served by the highest traffic volumes, and anchored by the Shaker Square Cinema, Dave's Supermarket, and several longstanding full-service restaurants. One block to the north is the distinctive Larchmere shopping district, anchored by Loganberry Books and antiques stores, and an eclectic mix of smaller shops and galleries. To the south is Buckeye Road, which is anchored by a few longtime businesses, but has seen much disinvestment and transience over the years. Overall, the neighborhood's resident population represents the greatest buying power of the six neighborhoods. Daytime employment is modest, with several social services agencies and design and professional firms in the area. The University Circle neighborhood, with its substantial cultural and university assets, is just down the hill.

Clark-Fulton. This neighborhood, in Cleveland's near west side, is characterized by a strong Hispanic population, and associated specialty food shops and restaurants. Anchors include several major employers, which draw a large population from outside the neighborhood during the day – at 20,000 workers within a 1-mile radius, the largest daytime population of the neighborhoods studied. Another neighborhood anchor is St. Rocco's church, which hosts the annual three-day St. Rocco's festival attracting visitors from throughout Northeast Ohio.

Detroit-Shoreway. The Detroit-Shoreway neighborhood is the smallest neighborhood of the group in population, but has seen much recent investment. It is anchored by recent substantial investment in historic building restoration and public theater in the Gordon Square Arts

District at Detroit and West 65th Street. Along with substantial housing investment in recent years, the neighborhood is seeing retail revitalization on its main street, with several blocks of restaurants and shops. To the south, Lorain Avenue is a second main street which demonstrates a need for revitalization and re-invigoration. Gentrification remains an issue, as the overall resident population remains at a similar level to the other neighborhoods. The neighborhood has good walkability and bicycle/public transit access to downtown, Ohio City and Tremont.

Slavic Village. The Slavic Village neighborhood was once home to 70,000 people at its population peak in the 1940's. The main intersection of Broadway and 55th was the center of the largest commercial center outside of downtown Cleveland, and housed banks, department stores, and three- and four-story retail buildings. Fleet Avenue to the south was a main street in its own right. Now home to a population closer to 12,000, the neighborhood has seen substantial disinvestment at Broadway and 55th due to its larger retail spaces. Fleet Avenue, a secondary main street to the south, is smaller in scale and is seeing slow revitalization in specialty ethnic Polish foods, a longtime family restaurant, and some new interest in smaller specialty shops. Further south on Broadway are the typical strip of newer chain commercial establishments. The neighborhood overall is base to several major anchors, including Third Federal Savings' headquarters, a major MetroHealth center, Cleveland Central Catholic High School, two Catholic parish churches, and a full range of K-8 Catholic schools. About 9,000 people work within a 1-mile radius of the neighborhood center. Morgana Park and the Morgana Run Trail run through the neighborhood, along with Mill Creek with the 40-foot Mill Creek Falls. The neighborhood was the "ground zero" for the mortgage/foreclosure crisis in 2007-9; however much effort and reinvestment has led to model programs for neighborhood housing and revitalization that are slowly driving property values up.



Union-Miles. The Union Miles neighborhood was once known as Newburgh Village, a historic 19th-century population center in Northeast Ohio that was larger than Cleveland at the time, centered on a traditional village green, and home to a lumber mill and associated industry based on power generated by the Mill Creek Falls. The Union-Miles primary market area (PMA) is the largest of the six studied in land area, and has the largest population and second-largest buying power level of the six neighborhoods studied. Commercial activity, however, is more limited than might be expected, with the lowest

number of firms and employees (309 and 2328 respectively) within a 1-mile radius of the neighborhood center. Once a thriving middle class African American neighborhood, the area has seen substantial disinvestment with the loss of manufacturing jobs starting in the 1950's. Neighborhood anchors include the Earl B. Turner Recreation Center, the Mather Daycare Center of the Center for Families and Children, and two public library branches. A new redevelopment at East 131st and Miles Avenue includes an independent grocery store, Fifth Third Bank branch, and health service center. Housing redevelopment is represented by two subdivisions from the 1990's, and active community development and land bank scattered-site demolition, restoration and infill programs.

Westown. Commercial activity of the Westown neighborhood is centered on Lorain and West 117th Street. Just to the north, the West 117th Street retail development with a Target and other big-box format stores creates substantial retail competition nearby, but West 117th provides excellent freeway access for attracting outside business compared to other neighborhoods. The street is home to a substantial historic asset which is currently vacant but which holds promise for the future – the Variety Theatre, built in 1929 and operating as a concert and performance venue until the early 1980's, with storefront retail spaces and upstairs apartments. The neighborhood has become home to growing Arab and central American populations. There are several middle eastern groceries, a hookah bar, and restaurants, and some convenience stores located within neighborhoods that offer middle eastern goods. Two central American tiendras (bodegas) and a couple of restaurants serve the Hispanic population. Neighborhood assets, in addition to the Variety Theatre, include Halloran Park and a public library branch. While the PMA population is low compared to the other six neighborhoods, at 13,000, there are 24,000 residents and 7,000 daytime workers within a 1-mile radius of the neighborhood center. Westown Square, a 170,000 square foot retail center, is near the heart of the neighborhood on Lorain Avenue, with discount clothing, health care, shoes, rentals, furniture, beauty supply, and a Save-a-Lot grocery. Perhaps partly because of this shopping area, Westown neighborhood residents demonstrated the highest capture rates of the six neighborhoods studied for goods purchased in the neighborhood by neighborhood residents.

See Appendix A for further discussion of the six Cleveland neighborhoods.

5. DEMAND ANALYSIS

Method. Demand was evaluated through definition of a Primary Market Area (PMA) for each neighborhood, and collection of census and commercially available demographic data within each PMA. A gravity model was constructed based on an initial analysis of shopping center aggregations throughout Cleveland, which formed the competitor network within which main street shopping area trade areas were defined. See Appendix G for an outline of competitors and boundary maps.

Capture rates and zip codes were collected through Visitors' Surveys in the summer of 2015, and helped to define neighborhood resident, Cleveland resident, and suburban resident shopping patterns in each neighborhood for different types of goods. See Appendix C for full capture charts for various types of goods. From this information, capture rate groups were organized for each neighborhood.

A demand model of household expenditures on various goods was constructed using data from the US Census income data, US Census Consumer Expenditures Survey, and the Bureau of Labor Statistics Census of Retail Trade; this model was weighted to account for variations in consumer expenditure according to household income. Merchant interviews helped to provide context on the business environment and customers. See Appendices D through H for more information.

Demographic findings

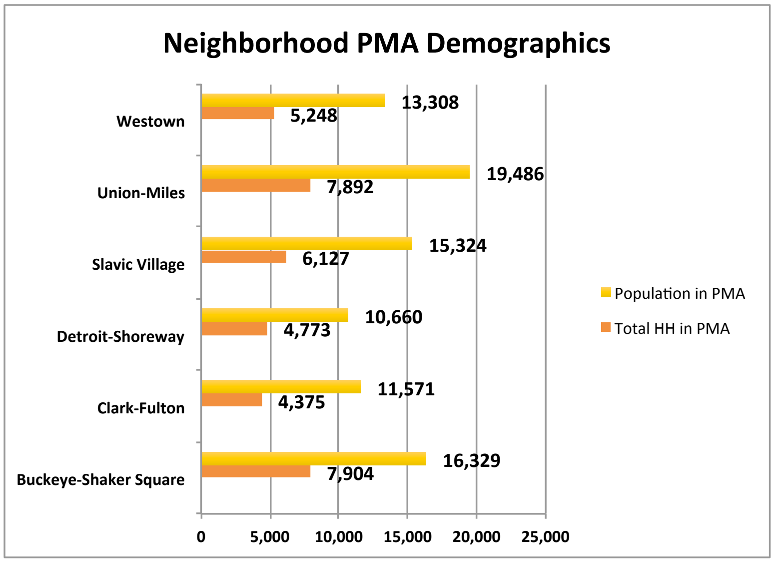
- The Neighborhood primary market areas range from 10,000 to 20,000 people, and from 4,300 to 8,000 households. Union-Miles has the largest population and corresponding number of households, and Detroit-Shoreway has the least population and number of households.
- The range of households including a person age 65 and over runs from 9% (Clark Fulton, Westown and Slavic Village, with Detroit Shoreway at 10%) to 17% (Union Miles). The Cuyahoga County level is 15.5%, indicating that most of the neighborhoods have higher numbers of younger people than is typical.
- Neighborhood PMA mean household income is in the range of $26,000 on the low end (Slavic Village PMA) to a high of $65,000 (Buckeye-Shaker Square PMA).
- Neighborhood annual buying power (resident household income) ranges from $113 million (Clark-Fulton) to $515 million (Buckeye-Shaker Square). Combined with population and household numbers, these numbers are substantially lower than what would be seen in a typical suburban shopping center trade area.
- See the CoStar Data table for information on employees within a 1- and 3-mile radius of neighborhood centers.
- Buckeye-Shaker Square has over 10 times the number of households earning over $200,000 per year as does the next-highest neighborhood (Detroit-Shoreway). On the low end is Clark-Fulton with an estimated 13 residents earning over $150,000. However, Buckeye-Shaker Square has 40% of households earning less than $25,000, ranging up to 60% in Slavic Village.

- The number of families with children in Cleveland neighborhoods is typical. Households with their own children under 18 range from 21% (Buckeye Shaker Square) to 31% (Slavic Village). This is in line with the Cuyahoga County level of 25%.
- Cleveland neighborhood households without access to a car are substantially higher than the County level (which is 13.7%). Westown has the lowest number of households without access to a car at 17%, and Slavic Village is the highest at 35%. This difference has significant implications for shopping and capture rates within the neighborhood.

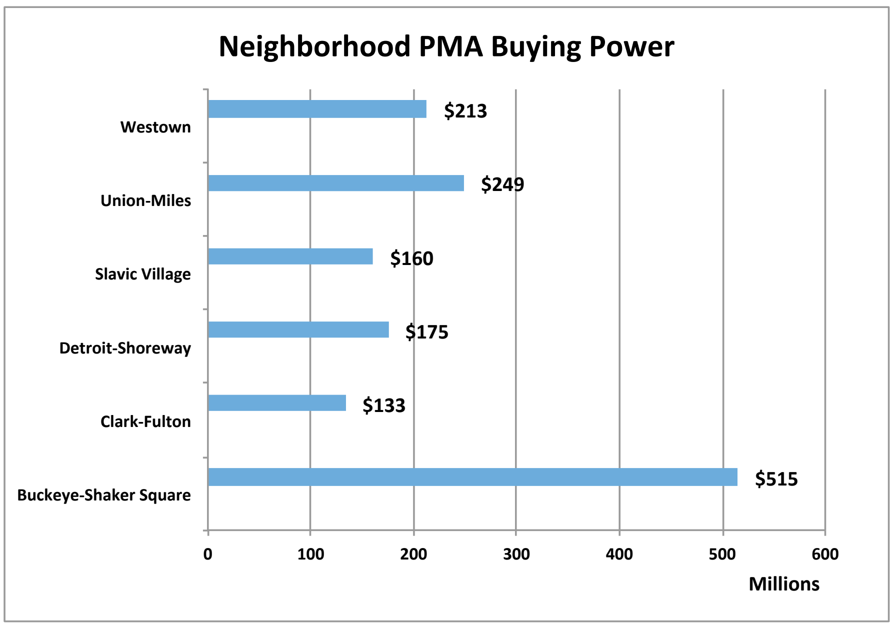
CoStar Demographic Data – Radius from neighborhood center location

	Buckeye-Shaker Square	Clark-Fulton	Detroit-Shoreway	Slavic Village	Union-Miles	Westown
Annual consumer spending						
Within 1 mile	$ 191,861	$ 112,744	$ 118,382	$ 92,625	$ 130,127	$ 177,680
Within 3 miles	$ 1,335,763	$ 944,767	$ 962,515	$ 713,797	$ 1,145,029	$ 1,435,976
Business within 1 mile						
No. businesses	721	1,524	691	627	309	629
No. employees	5,176	20,728	7,700	8,941	2,328	7,259
Population						
Within 1 mile	21,922	17,445	16,308	14,789	19,399	24,452
Within 3 miles	159,954	127,929	119,926	106,889	142,149	163,872
Households						
Within 1 mile	10,385	6,569	6,737	6,388	7,711	9,391
Within 3 miles	68,092	52,168	52,162	46,508	59,590	70,871
Median home value						
Within 1 mile	$ 89,489	$ 60,077	$ 71,177	$ 52,238	$ 54,536	$ 56,356
Within 3 miles	$ 87,929	$ 64,546	$ 70,316	$ 58,127	$ 67,074	$ 79,739
Mean household income						
Within 1 mile	$ 51,855	$ 34,756	$ 40,802	$ 28,549	$ 36,588	$ 39,408
Within 3 miles	$ 53,153	$ 40,731	$ 45,053	$ 33,597	$ 48,406	$ 48,635
Median household income						
Within 1 mile	$ 27,971	$ 23,379	$ 24,276	$ 18,685	$ 28,078	$ 30,006
Within 3 miles	$ 30,159	$ 25,896	$ 28,936	$ 22,018	$ 32,966	$ 34,917

Source: CoStar data 2015



Source: CSU CCPD, US Census 2014 5-year estimates



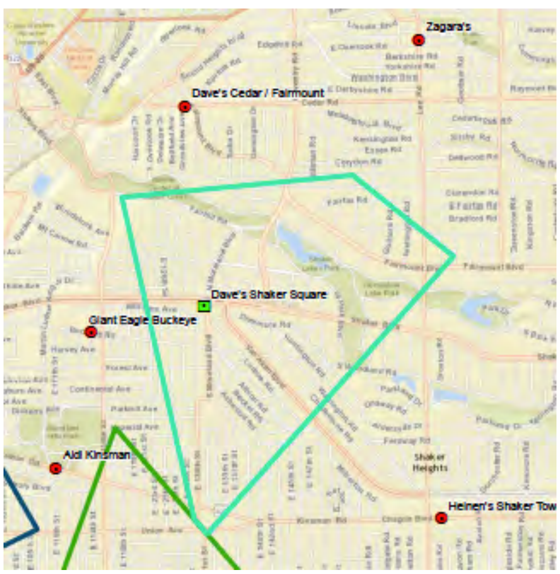
Source: CSU CCPD, US Census 2014 5-year Estimates

Visitors' survey findings

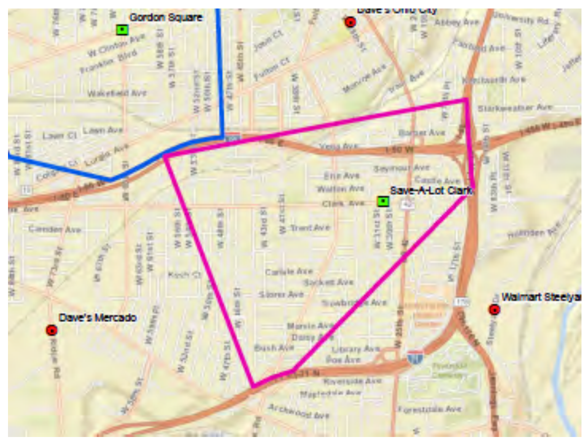
- A very high rate of validity was observed among surveys collected, with 98% reporting viable zip codes, and 91% providing viable 2 pages. Detroit Shoreway and Westown had relatively low numbers of surveys, at 56 and 39 respectively. The other neighborhoods each had at least 130 surveys collected.
- Except for Clark-Fulton events (St. Rocco festival and La Placita at 12%), neighborhood residents represented from 33% to 50% of all respondents. Cleveland residents overall ranged from 53% (Clark-Fulton) to 98% (Westown). Suburban attendees ranged from 20 to 45%, with one outlier, Westown at 3% for a small N of 40.

- Neighborhood residents in Cleveland neighborhoods do a lot of shopping in their neighborhoods. 44% of all neighborhood resident respondents shop for groceries in their neighborhood, with Westown, Slavic Village and Union-Miles topping the 40% level at 78%, 49% and 41% respectively. Neighborhood shopping levels are similarly high for health/beauty, coffee/bakery, restaurants/pizza, and auto supplies.
- For more durable goods and specialty goods such as clothing, jewelry, home furnishings, and books/music, neighborhood resident capture rates fall in the 10 to 35% range. When shopping outside their neighborhoods, residents seem to use an equal allocation of other Cleveland locations and suburban locations.
- Suburban resident capture rates in Cleveland neighborhoods are highest for restaurants and pizza (10% to 30%, 16% overall). Overall their shopping is predominantly in suburban stores and online. There are some “hot spots” of increased suburban shopping (10% up to 18%) for grocery (Union-Miles), jewelry/gifts (Detroit-Shoreway and Buckeye-Shaker Square), books/music (Detroit-Shoreway and Buckeye-Shaker Square), coffee/bakery (all neighborhoods) and cards/office supplies (Detroit-Shoreway).

PMA Boundaries

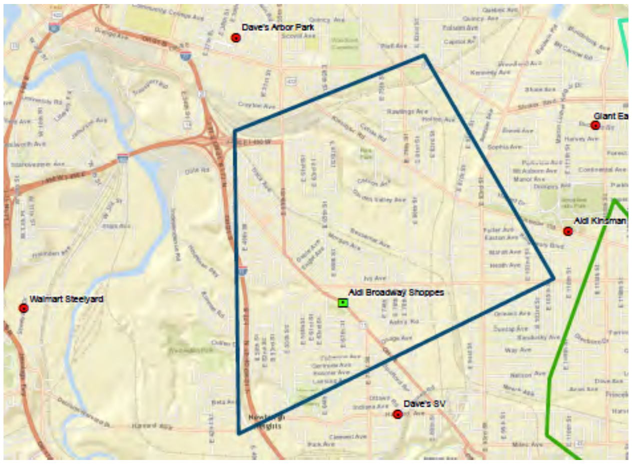


Buckeye-Shaker Square PMA

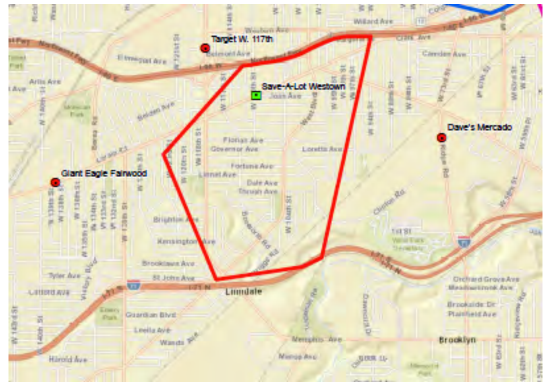


Clark-Fulton PMA

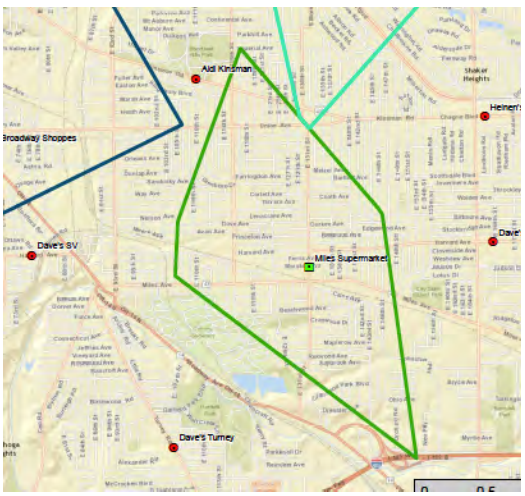
Detroit-Shoreway PMA



Slavic Village PMA



Westown PMA



Union-Miles PMA

Merchants' Survey/Interview findings:

23 total respondents were interviewed across the six neighborhoods. A wide range of types of businesses is represented: grocery, crafts/jewelry/gifts, full service restaurants, auto parts, bar/tavern, books/music, art gallery, clothing/shoes, beauty/barber, auto repair, professional services, florist. Of those reported, square footage ranges from 750 to 10,000 square feet; average 3500 square feet.

Number of customers per day varied greatly by type of store, location, season, and even weather. The range for all respondents was 10 to 100 per day. For restaurants, 600 to 800 customers per week was typical. Customers who are neighborhood residents ranged from 10% (some full service restaurants, bar/tavern, electronics, beauty salons) to 100% (grocery and florist). Falling in the middle were books (20%), other full service restaurants (50-60%), auto parts and auto repair (50-70%). This information, if confirmed in additional interviews, tempers the capture rates identified in the visitors' survey, and may be more accurate in the long run.

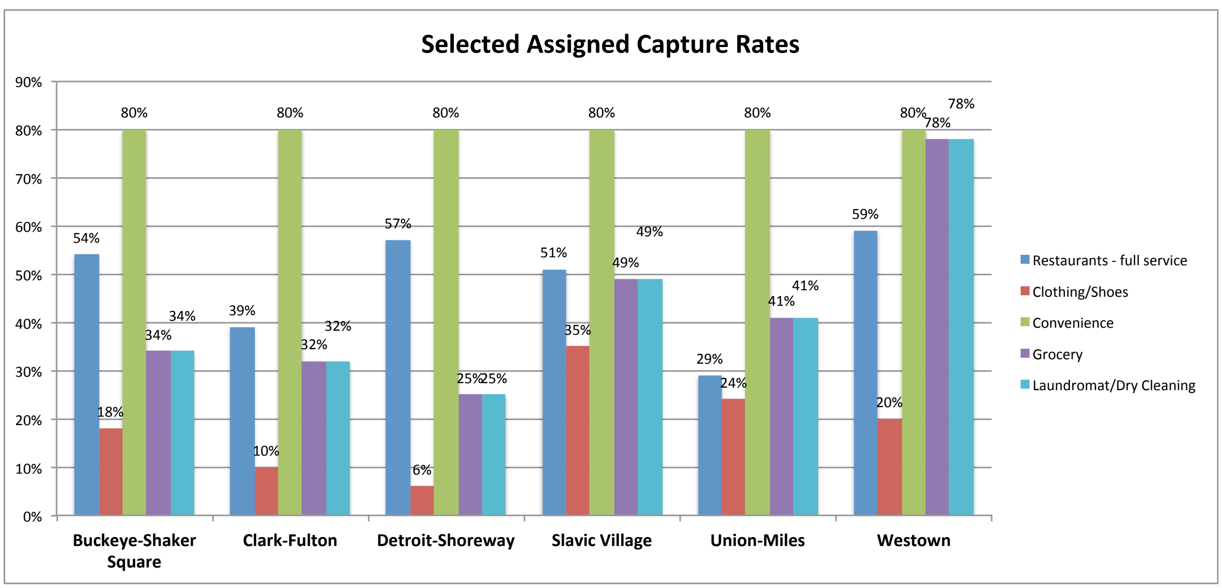
Busiest times were dominated by afternoons, with the exception of florists, auto repair and professional services (mornings), and bar/tavern (evenings). Full service restaurants varied by morning, lunchtime and evening depending on the store. This finding has implications for aligning store hours to achieve the "critical mass" needed to attract customers overall.

Seven (30%) felt their business was thriving and growing; 12 (52%) felt it was good to fair. Only three said it was "just barely making it" or "terrible". Many of the businesses noted things they would like to do with adequate funds, including expansion of space, improving appearance, and upgrading electrical and heating systems.

When asked what they would do to improve the business environment, eight of the respondents (35%) mentioned improving policing, security and lighting. Other suggestions included increasing critical mass of stores and providing longer hours, attracting a wider range of customers including younger patrons, cleaning up and improving neighborhood appearance and working together with other merchants.

Employment information was collected on a few of the businesses, and demonstrated that full time employment, while low, is real, and could be a sizeable contribution to the local economy if a critical mass of stores is present. It would be worthwhile and interesting to look at this issue more closely in the future.

See Appendix C for more information.



Demand findings

- Household expenditures for basic goods vary by income. The overall expenditure for all retail goods ranged from 20% to 33.9% for higher and lower income households respectively. A weighted average for the Cleveland neighborhoods studied was 31.51%.

- Food consumed outside the home now represents 6% of household income spending, as a national average. Expenditure on food outside the home does not vary as widely across incomes as does expenditure for retail goods. The range is 4.5% for incomes $20,000 to $29,999, to 6.1% for incomes $70,000-79,000. The weighted average for our Cleveland neighborhood group was 5.36%.
- Of the 31.51% of household income spent on retail goods, the largest proportion is spent on grocery stores (5.61%), gas stations/convenience (5.24%), hardware/home/garden (3.1 percent), and general merchandise (6.51%).
- Of the 3.02% of household income spent on consumer services (excluding health care and education), the largest proportion is spent on legal and financial services.

6. SUPPLY ANALYSIS

Method. A detailed inventory of retail business, category, space and occupancy within each neighborhood PMA was compiled using Reference USA, CoStar, and Thriving Communities Institute data. Each building was then checked address by address using Google Maps Street View (image dates 2011 through 2015), and first floor square footage was measured using Google Earth Pro. Limited windshield checks were conducted. More work will be done this summer to field verify inventory.

See Appendix F for detailed discussion of classification of vacant space, and space occupied by "other uses". Many vacant retail buildings are somewhere on a continuum between ready for occupancy, and needing more work than might be economically feasible in order to bring it to viability. This inventory used a certain amount of judgment in determining the assignment and measurement of true vacant retail space. In reality, the question of obsolescence and restorability would be addressed on a case-by-case basis, depending on construction needed, its likely cost, and return on investment projects based on possible rents.

Average business size and annual sales were compiled for each business type category using Reference USA, measured inventory data, ULI, and other resources identified on the web.

Specialty Category	Overall Square Footage Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
TOTAL RETAIL AND SERVICES	**271,431**	**469,450**	**382,700**	**633,061**	**358,185**	**635,302**
TOTAL OTHER USES	84,760	19,100	39,900	76,910	67,480	89,800
Measured vacancy*	63,900	32,900	60,300	182,648	107,089	124,601
Grand Total	**420,091**	**521,450**	**482,900**	**892,619**	**532,754**	**849,703**
Measured vacancy rate*	15.2%	6.3%	12.5%	20.5%	20.1%	14.7%

Source: CSU CCPD, Reference USA, Google maps and Google earth.
Notes:
Square footage measured includes first floor storefront only.
*Measured vacancy includes a subjective judgment of what appeared to be potential storefront in the future.
More work is needed to define measured vacancy.
In particular, vacant spaces not on main streets that were in poor condition, or had clearly been repurposed for other uses, were not counted as vacant.

Inventory findings

- Total occupied retail space in the neighborhood PMAs ranged from 270,000 square feet (Buckeye-Shaker Square) to 635,000 square feet (Westown).
- Measured vacancy ranged from 6% (Clark Fulton) to 20% (Union-Miles and Slavic Village). Detroit-Shoreway (12%), Buckeye-Shaker Square (15%) and Westown (14%) were somewhere in-between. Note that "measured vacancy" ignored retail space which was in poor condition, or had been repurposed for other uses. Further information is detailed in Appendix F.
- Auto repair/service was the retail/service category with the highest square footage as a percentage of total retail, across all neighborhoods. Convenience, general merchandise, grocery, and full service restaurants also ranked high overall with over 5% of total retail/service square footage.
- In individual neighborhoods, full service restaurants ranged up to 16% of the total (Buckeye Shaker Square) with this category also high in Detroit-Shoreway. Salons/barber shops were also high in Buckeye-Shaker Square, and in Union Miles and Westown; convenience was high in Detroit-Shoreway. These categories reflect a very distinctive urban neighborhood pattern.
- Convenience stores in particular drew the author's attention during the inventory process. There seem to be many of them in every neighborhood, many occupying longtime older storefronts on side streets that probably have housed similar corner stores for generations. Their small sizes do not lend them to providing a range of affordable fresh food. And yet, the author is aware that these "bodegas" succeed in urban neighborhoods in larger US cities and many others in the world. Reference USA's typical sales per square foot, if accurate, reflect a likely modest profit margin that is at least consistent. Innovative programs to introduce fresh produce and other higher-quality goods to local neighborhood convenience stores may be well-placed if economically sustainable practices can be developed.
- Square footage that was dedicated or had been repurposed to other uses ranged from 19,000 (Clark Fulton) to 90,000 (Westown). "Other uses" (community, nonretail business, church, daycare, residential, and unclear) as a percentage of total retail, vacant, and other use space ranged from 4% (Clark Fulton) to 24% (Buckeye-Shaker Square).

- While typical business sizes of mainstream retail can be quite large, around 10,000 square feet for a drugstore, 7,000 square feet for an auto supply store, and up to 120,000 or even more for a large general merchandise store, neighborhood retail stores are typically substantially smaller. Many storefronts range from 500 to 1500 square feet, although businesses often combine two or three storefronts together to achieve larger spaces. This provides an opportunity for smaller businesses to get a foothold with less investment (in space and inventory). It also provides business at a scale that works for walkable main streets, and the intimacy that goes with the personal service that signifies independent business. Main Street business advisors note that inventory control software can now help small businesses maintain the right proportion of inventory within a small space to optimize the investment of space and capital to maximize sales.
- Annual sales data varied widely between Reference USA and ULI information, sometimes by a factor of ten. More information is needed to understand true dollars per square foot sales of independent businesses. A rule of thumb given in the reference table from a business advisor suggests $250-350 per square foot is typical for independent main street businesses. When in doubt, this estimate was used as a baseline for selecting the appropriate figure.
- Reference USA data on employees for different businesses was highly variable and suspect enough that it was not included in this study. In addition, it did not distinguish between full- and part-time employees. Additional work is needed to understand employment levels in urban main street businesses.
- Average daily traffic volumes on the key non-freeway main streets in each neighborhood were in line with generally understood main street retail attraction levels of 8,000 to 20,000 vehicles per day. In general, traffic volumes are high enough to attract drive-through demand, in addition to neighborhood resident and destination visitor demand. Of interest, Detroit Shoreway's lower numbers do not seem to affect the growing success of local businesses in comparison to the other neighborhoods.

7. COMPARING SUPPLY AND DEMAND

Method. Supply and demand within each neighborhood's PMA were compared via a niche analysis model for multiple retail and consumer services categories. Inputs to the model were based on household expenditures, capture rate groups from the visitors survey, neighborhood buying power, inventory of space, typical sales per square foot, and typical business sizes for each category. In addition, total leakage was calculated for each category based on overall buying power and household expenditures. Summary tables are included here which show gap (retail demand based on capture rates) and leakage (total retail demand based on 100% capture, a theoretical maximum demand) for each category in each neighborhood. Categories highlighted in blue identify gaps or leakages over 500 square feet, the minimum typical size for a single urban neighborhood business.

RETAIL DINING AND SHOPPING – Buckeye-Shaker Square, Clark-Fulton, Detroit-Shoreway

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	18,919	12,612	(11,299)	(12,933)	(6,081)	(9,512)
Catering	7,722	5,148	2,000	1,334	3,151	1,750
Restaurants - full service	32,043	2,040	367	(1,764)	(2,866)	(14,547)
Restaurants - limited service	42,102	27,394	(8,991)	(16,693)	(1,102)	(11,210)
Total						
RETAIL SHOPPING						
Auto Parts	1,435	17,941	(54,216)	(51,752)	(6,173)	(500)
Beer/wine/liquor stores	2,375	6,986	(1,621)	(390)	594	2,375
Books/Music	(6,560)	(6,525)	(2,041)	(1,600)	815	1,181
Clothing/Shoes	3,134	37,002	(6,130)	3,500	(3,607)	9,593
Computer/electronics/phone	(557)	12,431	(12,426)	(9,061)	(4,703)	57
Convenience	(6,916)	(6,395)	(41,510)	(41,375)	(37,691)	(37,514)
Drugstores	2,201	21,672	(13,736)	(9,590)	(11,642)	(4,932)
Florists	(1,316)	(662)	11	217	29	285
Gas Stations/Convenience	17,480	22,875	(9,209)	(7,812)	3,537	5,372
General Merchandise	32,737	123,680	(8,591)	10,774	2,013	33,357
Gifts/novelties	102	927	(1,206)	(671)	248	825
Grocery	(631)	34,056	(20,643)	(11,385)	(8,833)	4,569
Hardware/Home/Garden	6,269	58,293	(1,719)	12,071	3,131	18,968
Health/Beauty	2,182	8,082	(1,562)	(306)	(1,786)	248
Home Furnishings	225	15,312	(3,000)	1,709	(6,500)	(320)
Household appliances	481	2,831	(8,200)	(7,467)	(1,800)	(837)
Jewelry	691	3,140	(859)	(86)	(893)	68
Luggage/leather goods	46	257	7	67	(3,695)	(3,612)
Musical instruments	299	906	(960)	(765)	15	308
Office Supplies/stationery	622	2,591	222	671	(4,294)	(3,519)
Other retail	(7,851)	(1,410)	(3,217)	(1,510)	(14,514)	(12,553)
Specialty foods	1,357	3,365	(4,259)	(3,569)	(9,354)	(8,716)
Sporting goods/outdoors/bikes	1,186	6,590	171	1,707	(1,866)	241
Toy/Craft/Hobby	(2,731)	(1,582)	(446)	(81)	17	550
Used merchandise	(23,716)	(19,219)	(8,292)	(6,420)	(16,154)	(13,970)

Source: CSU CCPD analysis

RETAIL DINING AND SHOPPING – Slavic Village, Union-Miles, and Westown

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	(9,100)	(10,474)	(2,133)	(610)	732	(1,091)
Catering	2,163	1,603	1,864	2,486	574	(14,815)
Restaurants - full service	11,723	3,739	6,428	9,465	(20,936)	(20,031)
Restaurants - limited service	(20,814)	(22,762)	3,069	8,660	2,870	2,126
Total						
RETAIL SHOPPING						
Auto Parts	(10,611)	(7,260)	(14,574)	(8,337)	(6,610)	(2,090)
Beer/wine/liquor stores	(3,934)	(2,825)	(15,617)	(13,627)	2,251	2,886
Books/Music	681	1,082	207	778	301	1,435
Clothing/Shoes	(11,250)	(2,893)	3,286	18,443	(18,002)	(4,356)
Computer/electronics/phone	(11,687)	(8,228)	(9,974)	(3,982)	(21,095)	(15,850)
Convenience	(41,051)	(40,889)	(41,544)	(41,292)	(26,726)	(26,511)
Drugstores	(7,932)	(3,697)	(8,794)	478	(13,019)	(9,824)
Florists	(3,327)	(3,139)	89	405	55	346
Gas Stations/Convenience	(7,432)	(5,753)	(4,480)	(1,875)	(3,037)	(809)
General Merchandise	(31,728)	(11,949)	(18,257)	25,053	(46,084)	(31,163)
Gifts/novelties	(1,865)	(1,745)	(19,927)	(19,528)	481	1,002
Grocery	(54,286)	(45,942)	10,404	25,376	(9,619)	(4,844)
Hardware/Home/Garden	5,956	17,632	5,686	27,009	1,894	17,884
Health/Beauty	(8,527)	(7,244)	(6,807)	(3,997)	(2,880)	(1,912)
Home Furnishings	(1,799)	2,558	(1,722)	6,177	(17,004)	(10,473)
Household appliances	(6,497)	(5,819)	(2,163)	(933)	(4,448)	(3,431)
Jewelry	274	978	334	1,516	(2,792)	(1,703)
Luggage/leather goods	28	80	30	124	(1,179)	(1,094)
Musical instruments	79	282	96	437	60	374
Office Supplies/stationery	169	807	263	1,251	407	1,070
Other retail	(2,514)	(1,068)	(424)	2,217	(7,786)	(5,806)
Specialty foods	(5,307)	(4,641)	(589)	908	(20,336)	(19,597)
Sporting goods/outdoors/bikes	(532)	801	764	3,182	544	2,722
Toy/Craft/Hobby	111	504	133	781	167	668
Used merchandise	(3,800)	(2,700)	(794)	1,378	(5,739)	(3,483)

Source: CSU CCPD analysis

CONSUMER SERVICES – Buckeye-Shaker Square, Clark-Fulton, Detroit-Shoreway

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	30	110	(51,245)	(51,031)	(22,820)	(22,147)
Auto repair/services	(16,471)	(14,573)	(9,202)	(6,868)	(4,774)	(1,395)
Banks	(1,795)	6,949	(6,998)	(6,980)	5	26
Bowling	34	77	51	340	134	446
Cinemas	(19,134)	(18,689)	(540)	(169)	677	1,353
Dental offices	2,707	3,980	(3,017)	(2,628)	(1,462)	(900)
Financial Services/Insurance	(1,100)	356	(4,404)	(4,334)	(1,460)	(1,348)
Fitness/Health/Dance/martial a	(979)	(653)	(4,279)	(4,087)	(7,583)	(7,320)
Funeral Svcs	(2,404)	(1,877)	(6,228)	(6,076)	(5,927)	(5,706)
Laundromat/Dry Cleaning	(5,006)	(4,436)	(746)	1,468	436	3,632
Legal Services	3,346	10,184	(1,297)	(1,292)	3	10
Locksmiths	(1,190)	(1,169)	11	29	10	37
Optometrists	157	463	(1,162)	(1,080)	39	157
Other Services	(9,778)	(6,489)	(3,796)	(2,861)	(8,318)	(7,036)
Pet Stores/Services	(431)	1,063	(2,612)	(2,214)	192	769
Photography Services	(1,949)	(1,714)	(993)	(926)	(9,994)	(9,903)
Radio/Television/Electronic svc	65	242	(675)	(637)	21	82
Real Estate Services	(5,153)	(1,294)	122	1,219	(204)	1,300
Salon/barber/unisex	(29,002)	(27,340)	(16,364)	(16,010)	(7,549)	(6,976)
Shoe repair	7	21	2	5	2	7
Tailoring/alteration	(883)	(849)	(1,196)	(1,187)	4	17
Tax Preparation/Accounting	(134)	1,546	(4,789)	(4,341)	(3,584)	(2,934)
Travel Services	94	525	14	136	11	178

Source: CSU CCPD analysis

CONSUMER SERVICES – Slavic Village, Union-Miles, Westown

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	1,259	1,285	(35,419)	(34,542)	(45,455)	(46,171)
Auto repair/services	(17,279)	(15,176)	(3,377)	397	(11,993)	(10,789)
Banks	(34,586)	(34,575)	16	37	10	32
Bowling	343	408	418	633	260	542
Cinemas	(286)	(261)	1,576	1,922	(9,985)	(10,906)
Dental offices	(11,509)	(11,159)	(563)	65	(6,339)	(6,139)
Financial Services/Insurance	68	139	(3,940)	(3,784)	(3,369)	(3,315)
Fitness/Health/Dance/martial a	(26,610)	(26,444)	(4,405)	(4,103)	(13,932)	(13,660)
Funeral Svcs	(8,468)	(8,331)	(12,329)	(12,083)	(4,322)	(4,243)
Laundromat/Dry Cleaning	(2,172)	(1,174)	2,476	5,159	565	3,213
Legal Services	5	10	6	15	(2,790)	(2,787)
Locksmiths	17	34	15	53	32	46
Optometrists	(2,229)	(2,156)	92	223	(4,201)	(4,159)
Other Services	(4,263)	(3,451)	465	1,937	(17,203)	(15,877)
Pet Stores/Services	(1,055)	(696)	448	1,093	729	935
Photography Services	31	89	(867)	(762)	24	118
Radio/Television/Electronic svc	37	75	33	117	71	100
Real Estate Services	(917)	35	545	2,272	389	1,943
Salon/barber/unisex	(7,203)	(6,842)	(25,292)	(24,501)	(28,933)	(28,660)
Shoe repair	3	6	4	10	7	9
Tailoring/alteration	8	16	(490)	(475)	17	21
Tax Preparation/Accounting	(14,712)	(14,308)	(696)	29	(7,088)	(6,857)
Travel Services	(4,043)	(3,937)	61	253	(1,657)	(1,483)

Source: CSU CCPD analysis

Niche Metrics Comparison. In addition, amount of square footage in each category was compared across neighborhoods in proportion to population, household numbers, and overall PMA buying power. This analysis demonstrated no pattern relating the quantity of square footage to population, households, or buying power in urban neighborhoods. Other factors become far more important to business success, including location, outside visitors, merchant vision, capitalization, and marketing knowledge. (see conclusions).

Niche Metrics Comparison

SF/1000 population					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
16,623	40,571	35,901	41,312	18,382	47,738
SF/100 Households					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
3,434	10,730	8,018	10,332	4,539	12,106
SF/$100,000 Overall PMA buying power					
Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
53	352	219	395	144	299

Source: CSU CCPD based on inventory

Niche analysis findings

- Gaps and leakages are most consistently shown in dining, drinking and catering establishments. These levels are highest in Buckeye-Shaker Square with its substantially higher spending power.
- Leakages are for the most part substantially higher than square footage gaps, reflecting relatively low current capture rates for most goods, as illuminated in the visitors' survey. Only dining capture rates come close to leakage rates in the neighborhoods. Capture rates are driven by opportunity, showing a classic condition of urban neighborhoods, which is the lack of spending opportunity for particular goods within the neighborhood.
- The Buckeye-Shaker Square neighborhood, with its higher buying power, shows gaps and/or leakages in many categories.
- The Clark-Fulton neighborhood demonstrates strong "exports" (shoppers from outside) spending in excess of neighborhood demand in many categories.
- Strong patterns did not emerge in comparing square footages to population, household and/or spending power metrics across the neighborhoods. Neighborhood retail quantities varied widely related to basic neighborhood characteristics. The implications are that the question of "critical mass" goes well beyond quantity of retail space to incorporate major influencing factors such as building location, building condition and cost of renovation, potential rents, proximity of buildings to each other, and strength and quality of the individual businesses involved.

8. CONCLUSIONS

Overall findings

Retail critical mass. There is no pattern of retail square footage in relation to population, household numbers, or buying power. Key informant interviews indicate that retail success is highly variable, and based on multiple factors. And yet, consolidation and critical mass and density are understood to be contributing factors to retail business district success. Traditional approaches involving starting small with a few businesses and building incrementally, with attention to housing development, street environment, business success, and asset development, are likely strategies for success. Critical mass is defined as businesses that are open in close proximity to each other. Communities can enhance their main street's critical mass of shops by encouraging them to remain open at the same time, and at times when consumers prefer to shop.

Business success. Nevertheless, the merchants interviews demonstrated that independent businesses can thrive, or at least do well in typical Cleveland neighborhoods, and offer stability, employment, steady and loyal customer attraction, and ongoing investment. The specifics of each business vary widely with their location, retail category, and clientele, which aligns with the "personal service" and "unique experience" advantages of independent business. It does present challenges to the idea of creating critical mass, since critical mass is a factor of how many stores are open and operating at once.

Consolidation. Consolidation must be done strategically, focused on clusters of strong businesses, and areas with good access to freeways and high-volume roads, neighborhood character, and key assets or anchors, whether they are commercial or non-commercial. Historic buildings in non-target areas present a challenge to protect and conserve for the long term, until viable uses can be found.

Buying power and capture rates. Neighborhood buying power in primary market areas, given competitor locations, lower mean household incomes, and smaller PMA boundary areas, is much lower than is typical for suburban shopping areas. However, other forces have potential to increase sales to the point of viability: the presence of substantial employment in the vicinity; traditional main street walkability and vibrancy, providing an attractive shopping experience; customer preferences for shopping in their neighborhoods, as demonstrated by the visitor surveys, and high proportions of households without access to a car; consumer trends toward dining outside the home; interest of suburban shoppers in experiencing urban neighborhood shopping environments; significant and unique assets in each neighborhood; continuing growth of housing over time; and trends toward buying local.

Dining. Dining and drinking outside the home (restaurants, bars and taverns), a mainstay of main street business, command a sizeable proportion of household income which is growing. This expenditure level is similar for both low and high income households. Local business districts can capitalize on this as an opportunity.

Other strengths. Auto repair and auto parts, beauty salons, barber shops, convenience, and grocery remain mainstays of community expenditure in hard times as well as good times, and in particular provide the street with longtime business owners with stable incomes. Communities can continue to encourage business owners to interact and support each other and the neighborhood.

Convenience and dollar stores. Convenience and dollar stores are pervasive and play a strong role in retail commerce at the neighborhood level. There may be opportunities over time to help expand the role of these stores, many of which are owned by local residents, in providing healthy, well-priced and diverse goods for neighborhood consumers.

Leakage. While capture rates are high for some categories, overall they are low for most. The capture rate information could use to be verified through extended merchant interviews, since there were discrepancies between visitor and merchant capture reports. However, if capture rates are ignored, leakage rates (assuming 100% capture) for total household spending on particular goods are quite large. Neighborhoods should be aware of leakage and consider aggressive moves to capture a higher share of neighborhood spending over time.

Urban neighborhood markets. Findings in the study overall indicate that there are four basic markets that could be served in urban neighborhoods:

- **Neighborhood residents seeking affordable basic daily goods.** These are the customers patronizing dollar stores, convenience stores, discount clothing stores, and affordable restaurants and takeouts in their neighborhoods. Urban neighborhood revitalization risks closing this market out of neighborhood through gentrification without careful attention to the range of goods provided.
- **Neighborhood residents seeking unique products and services.** These are the "new locals" who have more expendable income and seek unique urban experiences in their neighborhoods.
- **Outside visitors seeking unique products and services.** Whether coming from other Cleveland neighborhoods or the suburbs, they are drawn to restaurants and shops, especially locally-owned, that provide a unique experience and neighborhood identity.
- **Employees working in the neighborhood vicinity.** Emphasis in this market is on lunchtime meals and daily errands done in the neighborhood for convenience. They may stay late for after-work meals and become "outside visitors" at that point.

These markets can be targeted specifically by merchants and economic developers in order to maximize marketing success, and provide a balance of goods and services appropriate to each neighborhood.

Next steps

This study had many "moving parts", and there were limitations both in data and in time available to fully explore some aspects. More time will be dedicated this summer to refining and verifying the inventory and vacancy information, and continuing conversations with merchants and CDCs. Additional areas that could warrant further exploration include:

- Catalog Thriving Communities Institute data on building condition for all buildings in the PMA, and analyze for patterns related to vacancy, reuse, and neighborhood retail capacity; refine the definition of vacant in relation to repurposing and deteriorating building condition.
- Continue to refine capture rate questions, and collect visitors' survey data in additional Cleveland neighborhoods to discern drivers of increased capture rates in other locations
- Map vacant spaces, occupied retail spaces, and spaces allocated to other uses, along with historic status, and look for patterns
- Compare PMA boundaries to perceived neighborhood boundaries in actual visitor shopping habits
- Find a way to assess true sales per square foot for various categories in urban neighborhoods
- Find a way to assess employment provided by retail establishments in urban neighborhoods
- Assess second floor and professional office space in the six neighborhoods, and compare to first floor square footage patterns
- Expand the study to incorporate more neighborhoods with varying conditions
- Separate out and study in more detail the role of neighborhood employees in retail demand

Caveats and exclusions

While this study has made an attempt to use methodical analysis to identify neighborhood strengths and challenges, to identify possible market opportunities in the retail environment, and to generate ideas and opportunities for business expansion, it should be noted that there is no guarantee that any business will succeed. There are many factors that contribute to the success of a business; a preliminary market study such as this one is only one of them.

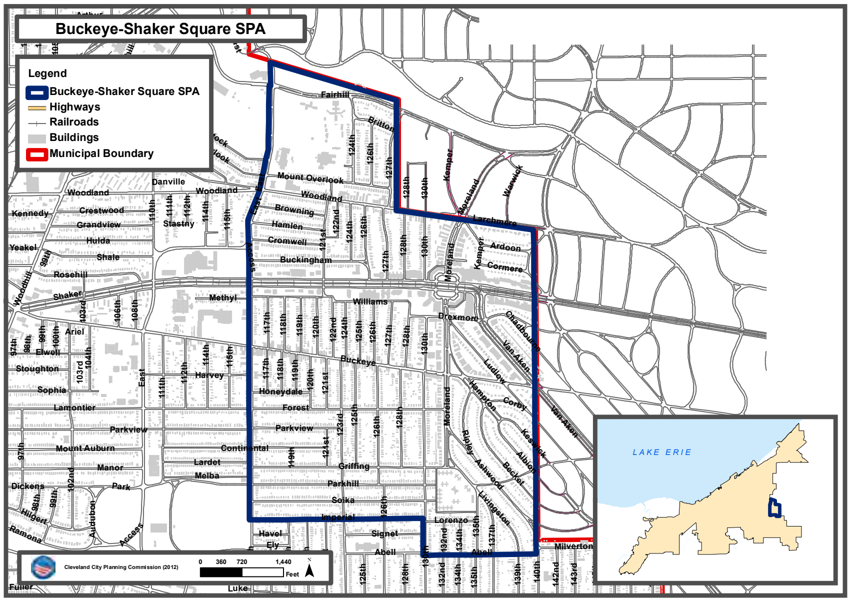
Data limitations on the study included the need to measure square footage via Google Earth, which may or may not relate to actual square footage on the ground; the limited visitors survey numbers in some neighborhoods; and the inbuilt vague nature of consumer expenditure information that was obtainable in visitors' surveys. It was impossible to measure employees per business, as originally intended, due to inability to obtain data from merchants. Data on average square footage per business, and average sales per square foot, was highly variable and required substantial judgment in application. Small adjustments in those assumptions could greatly change estimated leakages and gaps in the niche analysis. Data on household expenditures were national and may or may not define real expenditures in Cleveland. Finally, time limitations prevented complete merchant surveys, and followup with CDCs prior to finalizing this study.

APPENDICES

APPENDIX A: SIX CLEVELAND NEIGHBORHOODS

The six Cleveland neighborhoods were selected because they represent typical urban neighborhoods in Cleveland with a range of economic and neighborhood conditions, and that are in various stages of redevelopment. Each one has its distinctive potential, including historic and architectural assets, sense of community, and unique ethnic history and population. However, none has the current economic force of revitalization that is occurring in University Circle, Tremont, Ohio City, or downtown. They were selected because studying them might indicate possible ways forward for all Cleveland neighborhoods.

All maps were obtained from the City of Cleveland Planning Commission Neighborhood Maps downloads web site.



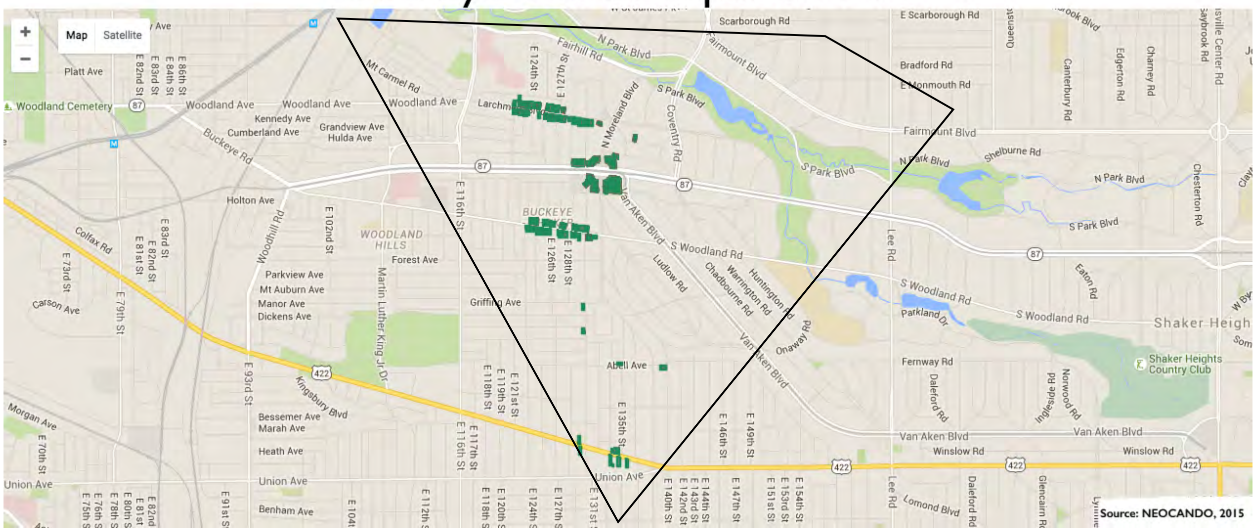
Buckeye-Shaker Square. The Buckeye-Shaker Square neighborhood is comprised of three distinct shopping districts. Shaker Square is central to the neighborhood, and is served by the highest traffic volumes, and anchored by the Shaker Square Cinema, Dave's Supermarket, and several longstanding full-service restaurants. One block to the north is the distinctive Larchmere shopping district, anchored by Loganberry Books and antiques stores on the eastern end, and several beauty salons and a youth life skills education facility on the west end. An eclectic mix of smaller shops includes several galleries, a store selling restored architectural elements for buildings and interiors, an upscale children's resale shop, and full-service restaurants. To the south is Buckeye Road, which is anchored by a few longtime businesses, but has seen much disinvestment and transience over the years. The street has a high rate of vacant, deteriorating and repurposed storefronts, and there is a need for investment and revitalization.

The resident population holds the highest mean and median household incomes, and represents the greatest buying power of the six neighborhoods. This is largely due to a sizeable number of higher-income seniors living in upscale apartment and condominium complexes in the Shaker Square-Larchmere area. Buckeye is home to a new housing/training venture for the formerly incarcerated, associated with Edwin's restaurant at Shaker Square.

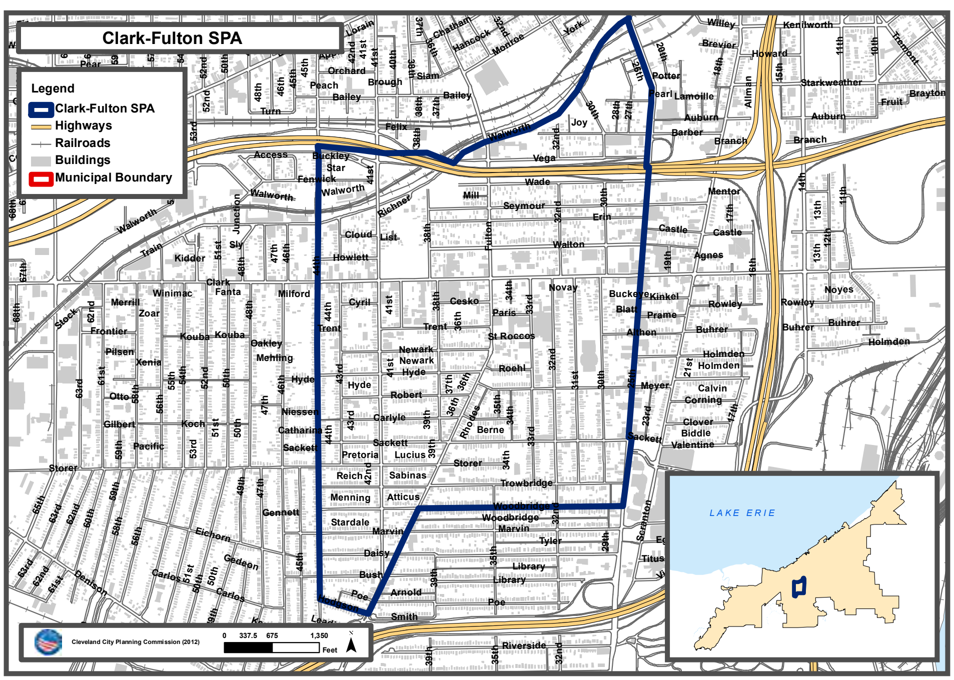
Housing in the neighborhood is highly diverse, and ranges from modest to more higher-value single family homes, to apartment and condominium buildings. The Buckeye Road area has many multi-family walkup buildings.

The neighborhood has modest daytime employment, and is home to the Fairhill Center for the Aging, and Kinsman Hospital. Several professional firms, including design, architecture, engineering, real estate, and legal offices, are based in Shaker Square. The neighborhood enjoys close proximity to major Cleveland attractions at University Circle, just down the hill via transit.

Buckeye Shaker Square PMA



Clark-Fulton. The Clark-Fulton neighborhood is located south of Ohio City in the near west side of Cleveland, and due west of Tremont. Major north-south street include West 25th Street and Fulton Avenue; Clark Avenue is the main east-west street.

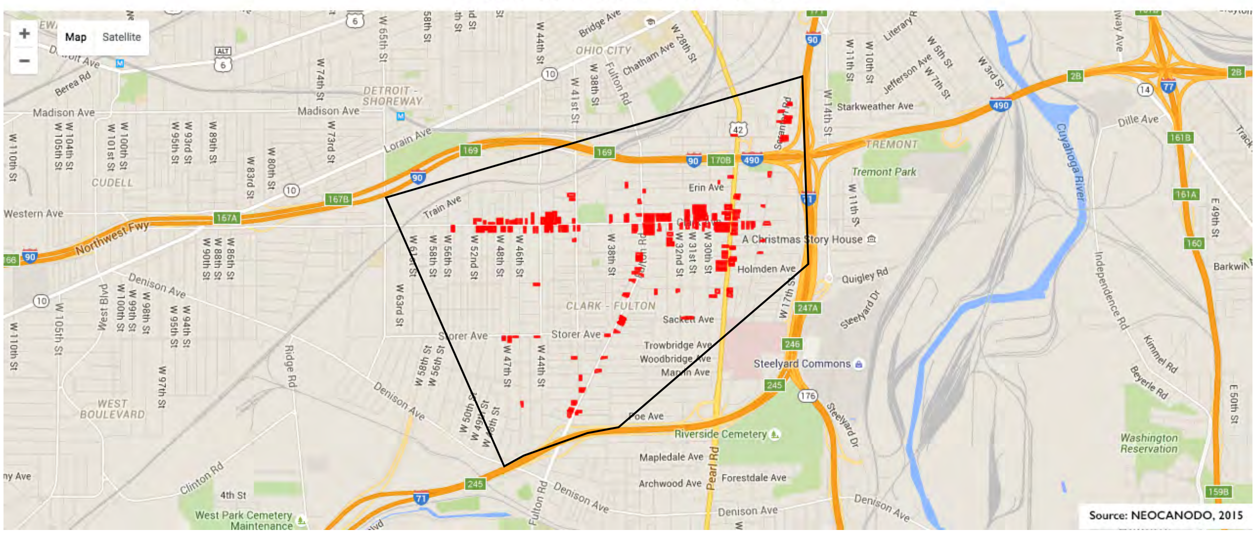


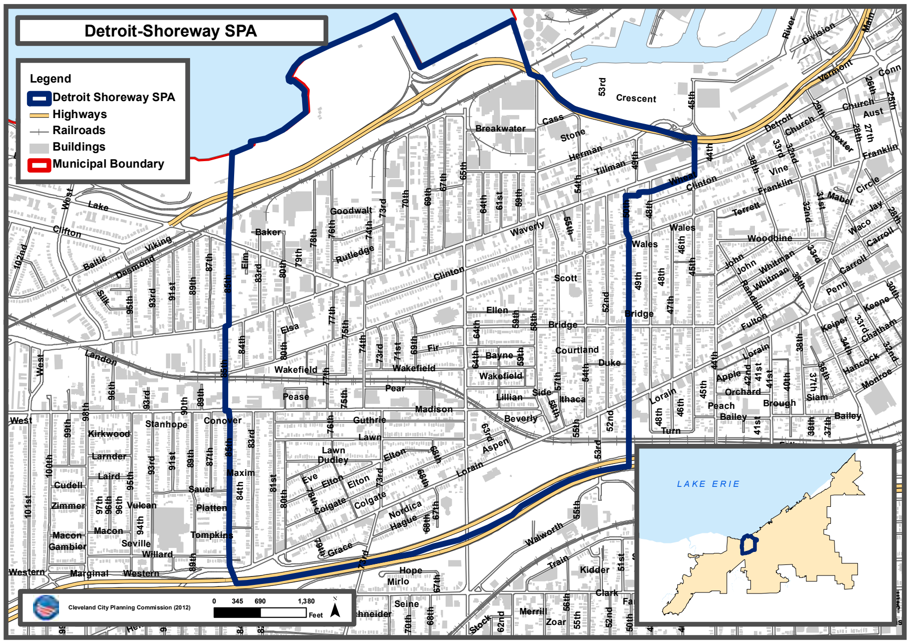
The neighborhood is characterized by a strong Hispanic population, and associated specialty food shops and restaurants. It is home to the primary Hispanic business associations and Hispanic-oriented social service programs in the City. Anchors include several major employers, which draw a large population from outside the neighborhood during the day – at 20,000 workers within a 1-mile radius, the largest daytime population of the neighborhoods studied. Possibly as a result, the neighborhood has the largest square footage of mainstream retail shops including drugstores, chain fast food, and auto parts stores, and demonstrates considerable negative leakage, essentially pulling shoppers from outside the neighborhood in many categories.

Another neighborhood anchor is St. Rocco's church, which hosts the annual three-day St. Rocco's festival. Visitors surveys collected at the festival demonstrate a wide range and high proportion of suburban zip codes, implying a strong connection to visitors from higher-income areas. The neighborhood resident mean and median household income are similar to the other neighborhoods, and indicate the need for low-priced neighborhood-serving retail as well.

Most of the homes in the neighborhood are modest single family homes on side streets, many of them historic. Housing in the neighborhood is seeing some restoration and revitalization spillover from Tremont to the east, particularly on Scranton Road and near West 25th Street.

Clark Fulton PMA





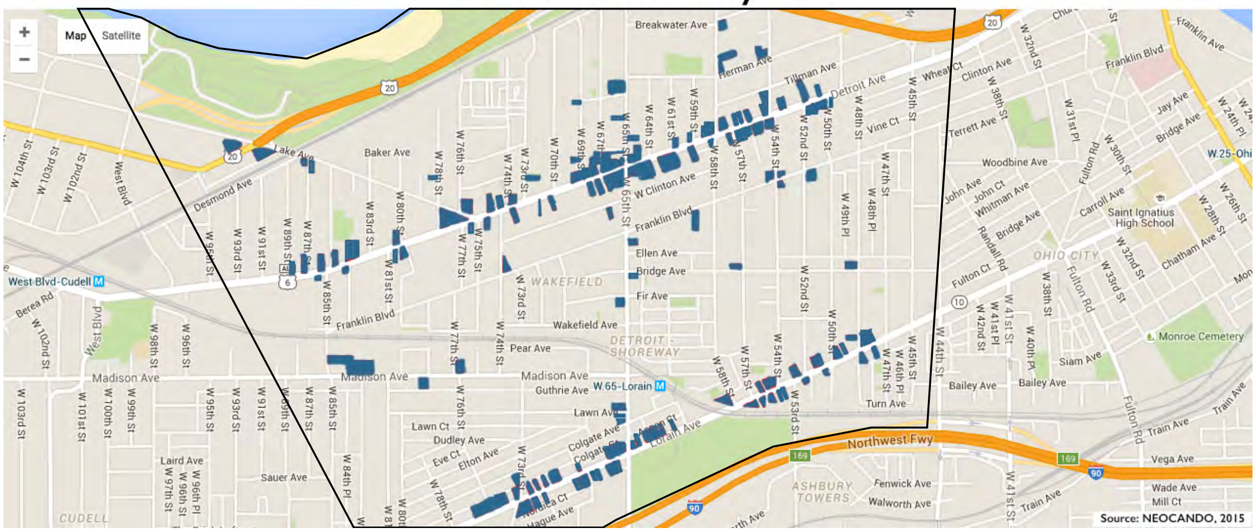
Detroit-Shoreway. The Detroit-Shoreway neighborhood is the smallest neighborhood of the group in population, but has seen much recent investment. It is anchored by recent substantial investment in historic building restoration and public theater in the Gordon Square Arts District at Detroit and West 65th Street. The Capitol Theatre building houses the west side's independent cinema, and the Near West Theater and Cleveland Public Theater also are based on Detroit Avenue in both new and renovated historic buildings . Bolstered by these cultural anchors, along with substantial housing investment in recent years, including the Cleveland EcoVillage, the neighborhood is seeing retail revitalization on its main street, with several blocks of restaurants and shops. The Happy Dog Saloon has generated attention through its collaboration with the Cleveland Orchestra; and the 78th street studios provide a home for resident artists and a venue (Third Fridays during the summer) for artist-patron interaction.

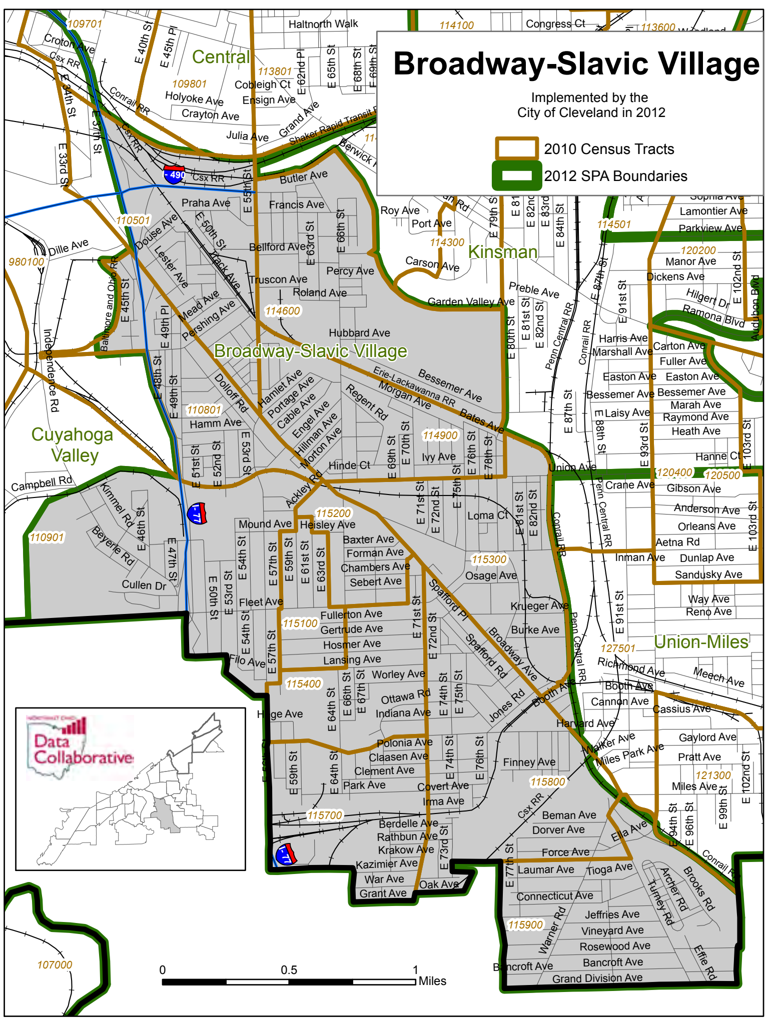
To the south, Lorain Avenue is a second main street which demonstrates a need for revitalization and re-invigoration. Several individual longtime businesses are spread along a ten-block area, with many vacant or repurposed buildings between. Lorain Avenue is also home to several auto sales lots and auto repair establishments.

Housing in the neighborhood ranges from apartment buildings to single family homes. Catholic Charities sponsors extensive senior housing complexes along Lake Avenue.

Gentrification remains an issue, as the overall resident population remains at a similar level to the other neighborhoods. In collecting surveys over the summer, several respondents engaged survey administrators in conversation about needing to keep the neighborhood affordable. Neighborhood streets surrounding Detroit and Lorain are slowly revitalizing due to new residents, particularly young people, buying and renovating older homes. The neighborhood has good walkability and bicycle/public transit access to downtown, Ohio City and Tremont.

Detroit Shoreway PMA





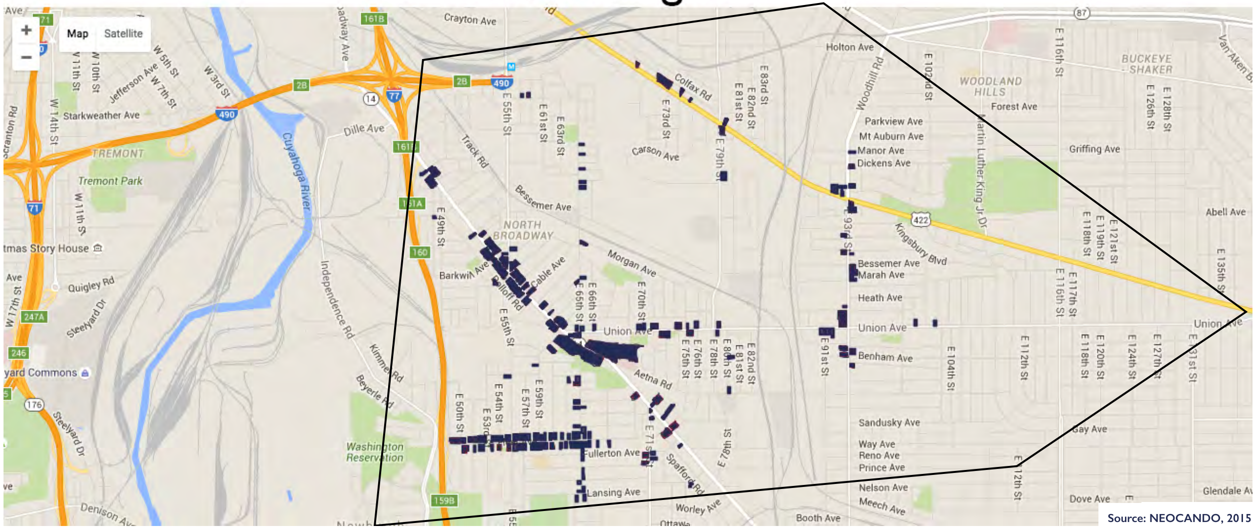
Slavic Village. The Slavic Village neighborhood was once home to 70,000 people at its population peak in the 1940's. The main intersection of Broadway and 55th was the center of the largest commercial center outside of downtown Cleveland, and housed banks, department stores, and three- and four-story retail buildings with more shopping, offices, and apartments on the upper floors. Many neighborhood side street intersections had corner store clusters of three or four buildings. Fleet Avenue to the south was a main street in its own right. The population was largely made up of immigrants from Europe of Slavic descent, which can be seen in the many remaining Slavic institutions, including the Slovenian National Home, the Sokol (Czech) gymnasium and museum, a Polish credit union, St. Stanislaus Catholic Church, and some ethnic food establishments.

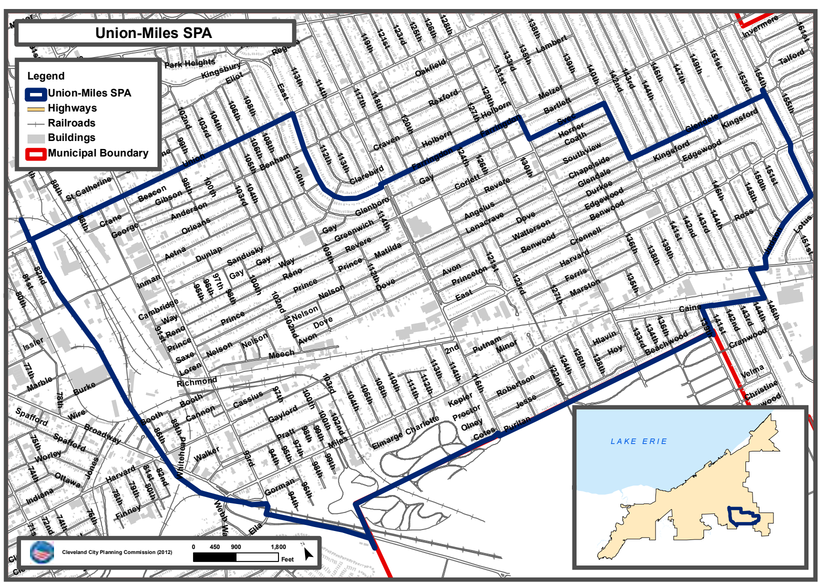
Now home to a population closer to 12,000, the neighborhood has seen substantial disinvestment at Broadway and 55th. Its large scale retail spaces and multiple floor buildings have been difficult to fill given the reduced population and changing retail shopping patterns. Daycare, churches, and similar uses that can take advantage of large floor areas have repurposed some Broadway Avenue storefronts; others remain boarded up. Fleet Avenue, a secondary main street to the south, is smaller in scale and is seeing slow revitalization in specialty ethnic Polish foods, a longtime family restaurant, and some new interest in smaller specialty shops. Further south on Broadway are the typical strip of newer chain commercial establishments, including fast food, dollar stores, cellphone stores, teen fashion, auto parts, and a Save-a-Lot. There is a thriving Dave's Supermarket on Harvard, on the south end of the neighborhood.

The neighborhood overall is base to several major anchors, including Third Federal Savings' headquarters, a major MetroHealth center, Cleveland Central Catholic High School, two Catholic parish churches, and a full range of K-8 Catholic schools. About 9,000 people work within a 1-mile radius of the neighborhood center. Morgana Park and the Morgana Run Trail run through the neighborhood. The Mill Creek Falls lie to the southern end of the neighborhood.

The neighborhood was the "ground zero" for the mortgage/foreclosure crisis in 2007-9, and much neighborhood housing was abandoned and deteriorated. With a strong response from City Council, the Slavic Village Development Corporation, the County land bank, Third Federal Savings, the Cleveland Neighborhood Housing Network, and in collaboration with development firms, the neighborhood is now a model of innovating and aggressive housing revitalization programs, including examples of new housing construction, buy-and renovate development programs, do-it-yourself supported renovation, homebuyer education, and other programs.

Slavic Village PMA





Union-Miles. The Union Miles neighborhood was once known as Newburgh Village, a 19th-century population center in Northeast Ohio that was larger than Cleveland, and home to a lumber mill and associated industry based on power generated by the Mill Creek Falls. Organized around Miles Park, a traditional village green, it had a historic center, some of which remains in the form of historic buildings, a public library building, and historic homes in the surrounding area.

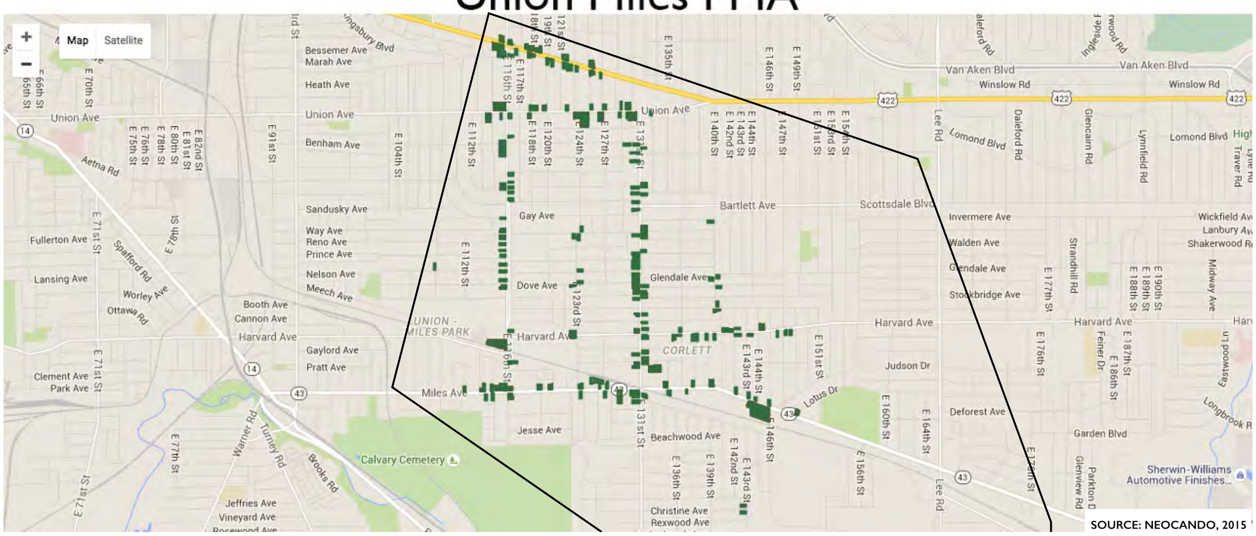
The Union-Miles neighborhood is the largest neighborhood of the six in land area, and has the largest population and second-largest buying power level of the six neighborhoods studied. Commercial activity, however, is more limited than might be expected, with the lowest number of firms and employees (309 and 2328 respectively) within a 1-mile radius of the neighborhood center. Many businesses are clustered along Miles Road and East

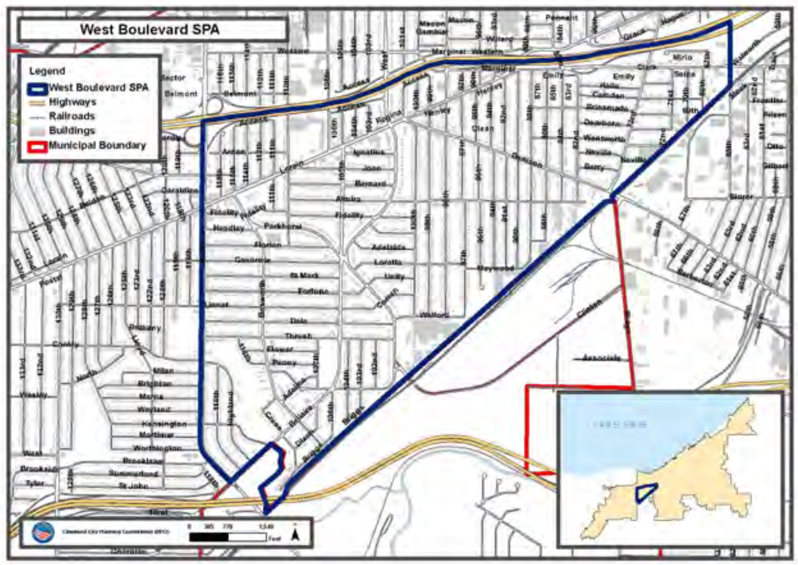
131st Street, with secondary business areas on East 116th, Harvard Road, Union Avenue, and Kinsman Avenue.

Once a thriving middle class African American neighborhood, the area has seen disinvestment with the loss of manufacturing jobs starting in the 1950's. Neighborhood anchors include the Earl B. Turner Recreation Center, the Mather Daycare Center of the Center for Families and Children, and two public library branches. The neighborhoods are remarkable, in spite of abandonment, demolition and deterioration brought on by the mortgage crisis of 2007-2009, for the large number of churches which are well-kept and appear to be successful re-uses of former commercial businesses, as well as original church buildings. Scattered successful businesses demonstrate investment and viable commercial activity. A new redevelopment at East 131st and Miles Avenue includes an independent grocery store, Fifth Third Bank branch, and health service center.

Housing in the neighborhood includes single family homes, and many multi-family two and three-story walkup structures. Housing redevelopment is represented by two subdivisions from the 1990's, and active community development and land bank scattered-site demolition, restoration and infill programs.

Union Miles PMA





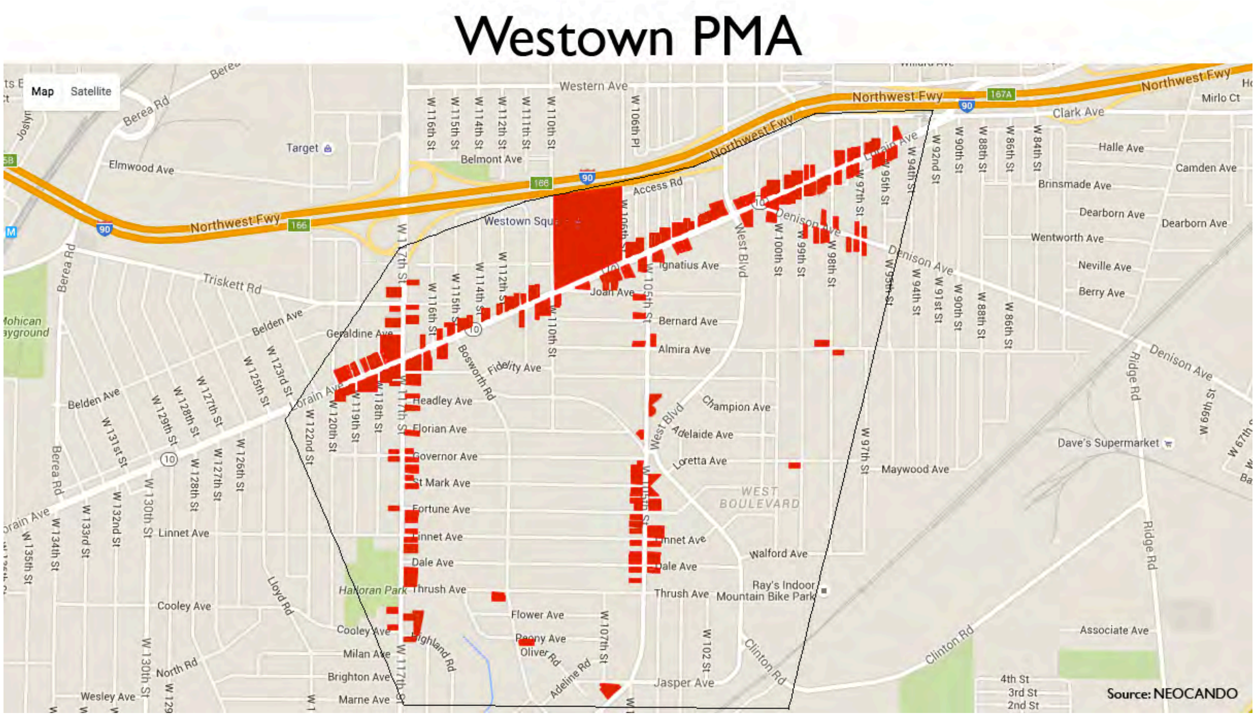
Westown. The Westown neighborhood runs along Lorain Avenue from about West 90th street to West 130th Street, between I-90 and I-71. Commercial activity is centered on Lorain and West 117th Street. North of I-90, the West 117th Street retail development with a Target and other big-box format stores creates substantial retail competition nearby, but West 117th provides excellent freeway access for attracting outside business compared to other neighborhoods.

The street is home to a substantial historic asset which is currently vacant but which holds promise for the future – the Variety Theatre, built in 1929 and operating as a concert and performance venue until the early 1980's, with storefront retail spaces and upstairs apartments. The neighborhood CDC, working with the Detroit Shoreway CDC, has been working on obtaining historic preservation tax credits to provide seed money for project redevelopment. Options for the space include a brew pub restaurant, or a restored theatre venue; retail space and apartments would be restored as well. The CDC has acquired property across the street to accommodate parking needs.

The neighborhood has become home to growing Arab and central American populations. There are several middle eastern groceries, a hookah bar, and restaurants, and some convenience stores located within neighborhoods that offer middle eastern goods and food. Two central American tiendras (bodegas) and a couple of restaurants serve the Hispanic population. A longtime Mexican restaurant, Luchita's, is located on West 117th. The Lorain/West 117th area is also home to a number of dental practices. Several longtime bars dot Lorain Avenue including the Pride of Erin, an Irish pub, and Vibe Bar, with a gay clientele.

Neighborhood assets, in addition to the Variety Theatre, include Halloran Park and a public library branch. While the PMA population is low compared to the other six neighborhoods, at 13,000, there are 24,000 residents and 7,000 daytime workers within a 1-mile radius of the neighborhood center. Westown Square, a 170,000 square foot retail strip, is near the heart of the neighborhood on Lorain Avenue, with discount clothing, health care, shoes, rentals, furniture, beauty supply, and a Save-a-Lot.

Most of the housing in the neighborhood is single family. Some new development along the eastern end of Lorian Avenue provides transitional housing for veterans and others.



APPENDIX B: KEY INFORMANTS

Throughout the study, key informants were contacted to get their feedback on the purpose and method of the study, retail business and CDC needs and interests, data and resources available, and selection of neighborhoods for study. The following were interviewed. In addition to those listed here, 23 merchants were interviewed, whose names are confidential in order to protect their identity in the survey.

Wendy Sattin,Neighborhood Progress Inc
Kathryn Hexter, CSU, Levin, Ctr for Comm Plng and Dev
Walter Wright, CSU, Center for Economic Inclusion
Robert Simons, CSU, Levin College, Professor, Real Estate
Carrie Carpenter, Citizens Bank Foundation
Sharonda Whatley, City of Cleveland
Terri Sandy, City of Cleveland
Kevin Schmotzer, City of Cleveland
Dan Musson, City of Cleveland
Jim Rokakis, Thriving Communities Institute
Sarah Ryzner, Thriving Communities Institute
Paul Boehnlein, Thriving Communities Institute
Laura Kleinman, University Circle Inc
Steve Lorenz, Kamms Corners

Jefferson Sherman, Sherman-Andrzejczyk Group, Inc.
Chris Alvarado, Slavic Village Development
Marilyn Mosinski, Slavic Village Development
Elizabeth Grace, Slavic Village Development
Marlane Westlian, Slavic Village Development
Anthony Trzaska, Slovenian National Home, Slavic Village
John Hopkins,Buckeye Area Development Corp
Lynell Washington,   Buckeye Area Development Corp
Vicki Dennis, Buckeye Area Development Corp
Jalene Pardon, Shaker Sq Area Dev Corp
Donita Anderson, North Union Farmer's Mkt
Adam Rosen, Detroit-Shoreway Dev Corp
Jeff Ramsey, Detroit-Shoreway Dev Corp
Brian Cummins, City of Cleveland
Adam Stalder, Clark-Fulton Development Corp
Adam Gifford, Clark-Fulton Development Corp
Maria Soucek, Clark-Fulton Development Corp
Jeanetta Price, Union Miles Dev Corp
Roshawn Sample, Union Miles Dev Corp
Rose Zitiello, Westown Comm Dev Corp
Patrick Colvin, President, Friends of Variety Theater, Westown
Anita Brindza, Cudell Improvement

APPENDIX C: VISITORS SURVEY AND FINDINGS

1. Method

A visitors' survey was completed in the summer of 2015. After development of the survey, the study author and student assistants attended thirteen neighborhood events in the six target neighborhoods. After determining that participants were over age 18, survey participants were given a clipboard and pen and asked to fill out both sides of the survey. After completion of each survey, it was folded and dropped in a secure box with a slot. Survey administrators engaged visitors in conversation about neighborhood main streets and the specific neighborhood in question. A shade canopy, chairs, and impromptu entertainment of children were offered for participant comfort. CSU signage made the origin and sponsor of the study clear.

One of the key pieces of information sought was the identification of shopping location patterns for different goods. The matrix used for this purpose, as well as other survey questions, was pre-tested at CSU with a range of participants including faculty, professional staff, clerical staff, and custodial staff. The survey was initially reviewed, and exempted from detailed review, by the CSU Institutional Review Board. A copy of the survey instrument is included at the end of this section.

2. General Survey Data

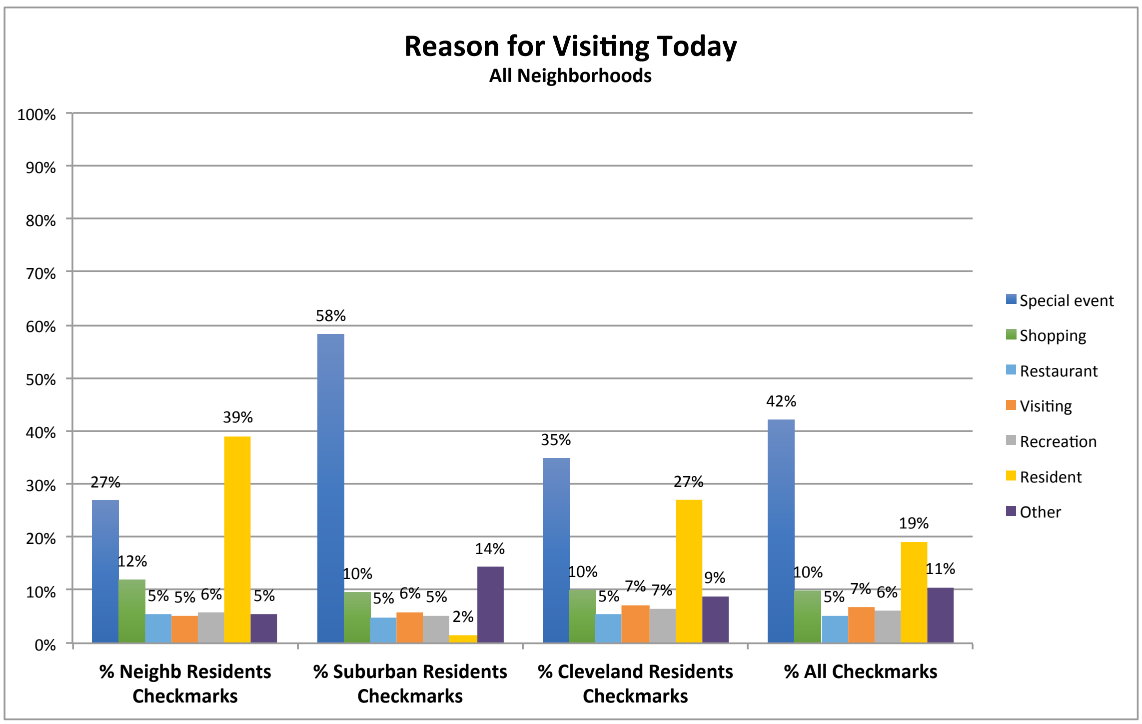
- Total surveys collected in six neighborhoods: 773 (100%).
- Total zip codes collected: 760 (98%)
- Total surveys that were valid for both pages, including matrix: 703 (91%)
- Total surveys that were valid for the front page, including matrix: 721 (93%)
- Total events: 13

Valid front page with capture matrix surveys collected:

NEIGHBORHOOD	EVENT	Event Subtotal	Neighb. Total
Buckeye-Shaker Square	Soul of Buckeye	37	
	Larchmere Festival	175	**212**
Clark Fulton	LaPlacita	63	
	St Rocco's Festival	80	**143**
Detroit Shoreway	Third Fridays	30	
	Patio Kulchur	26	**56**
Slavic Village	Dave's Supermarket	22	
	Pierogi Dash	57	
	Warszawa Music	53	**132**

	Fest		
Union Miles	Connecting Communities	70	
	Jazz Jamz	69	**139**
Westown	Lorain Flea Market	8	
	Halloran Park Festival	31	**39**
ALL NEIGHBORHOODS	**ALL EVENTS**	**721**	**721**

3. Neighborhood Visits Data – All Neighborhoods



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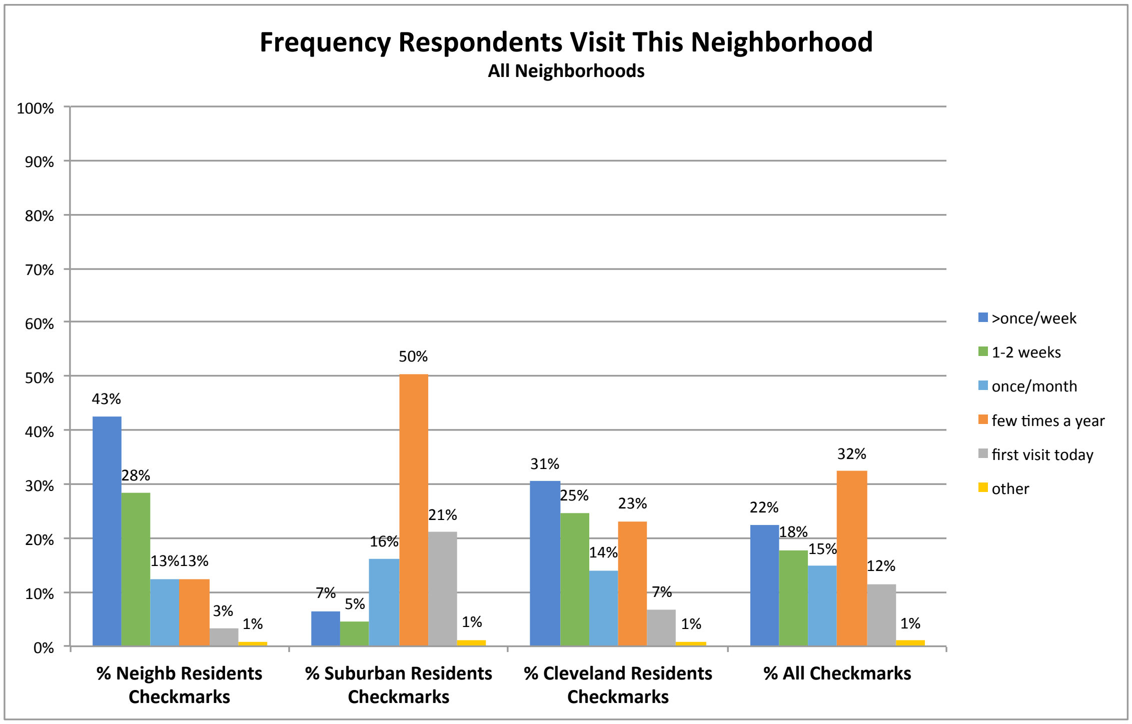

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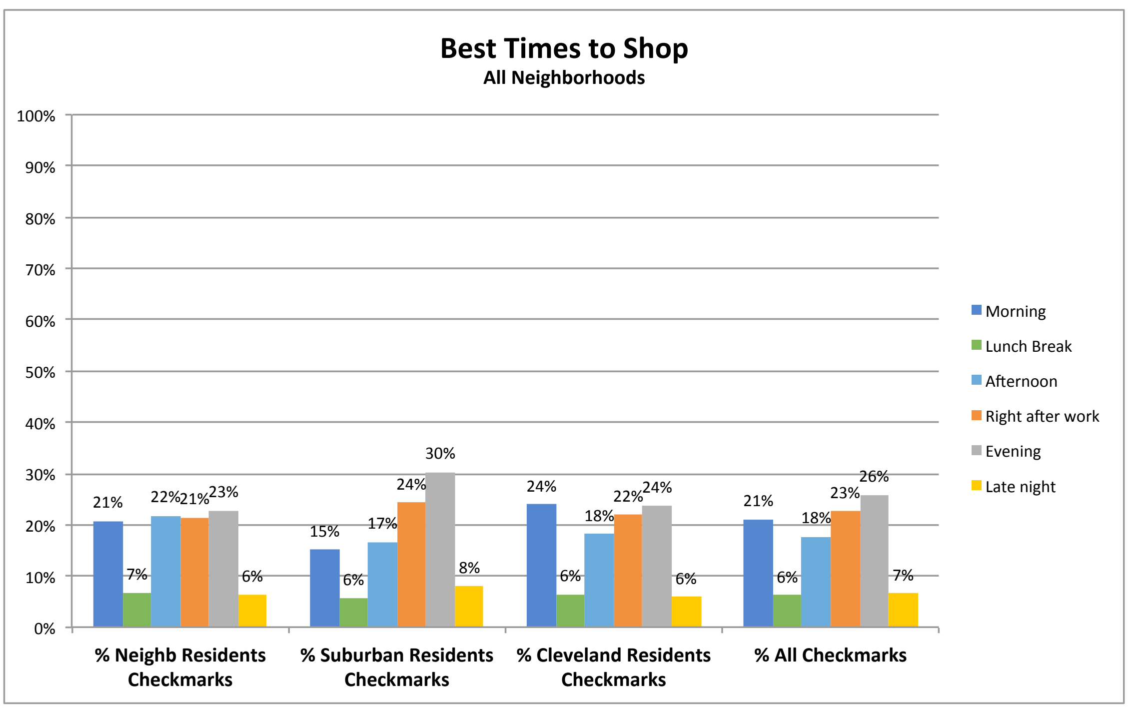

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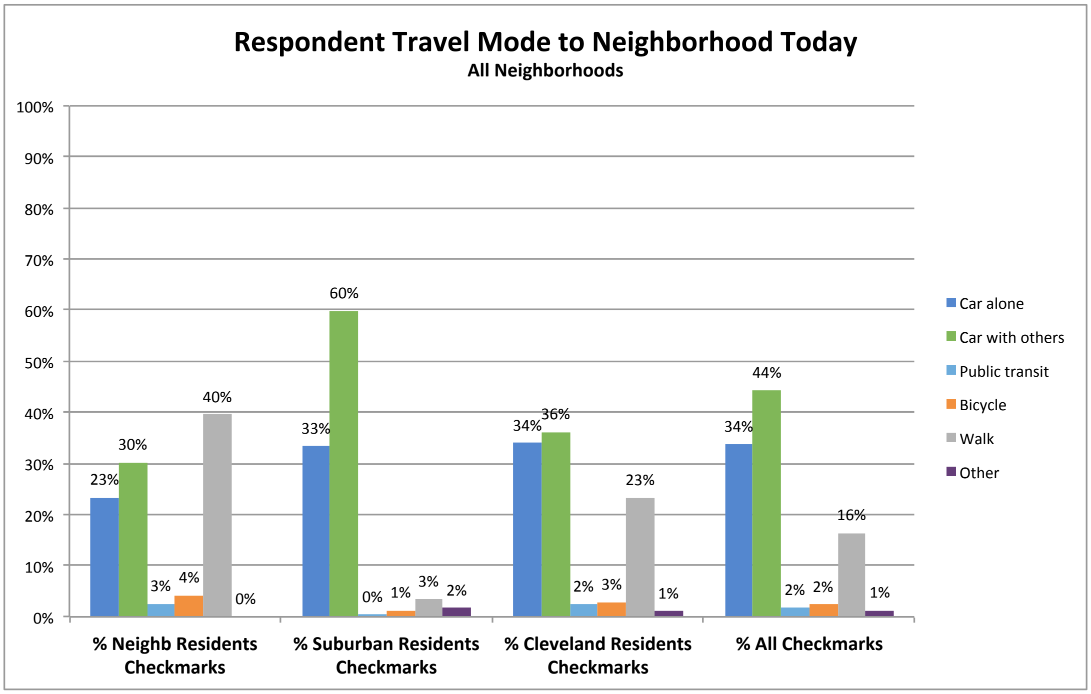
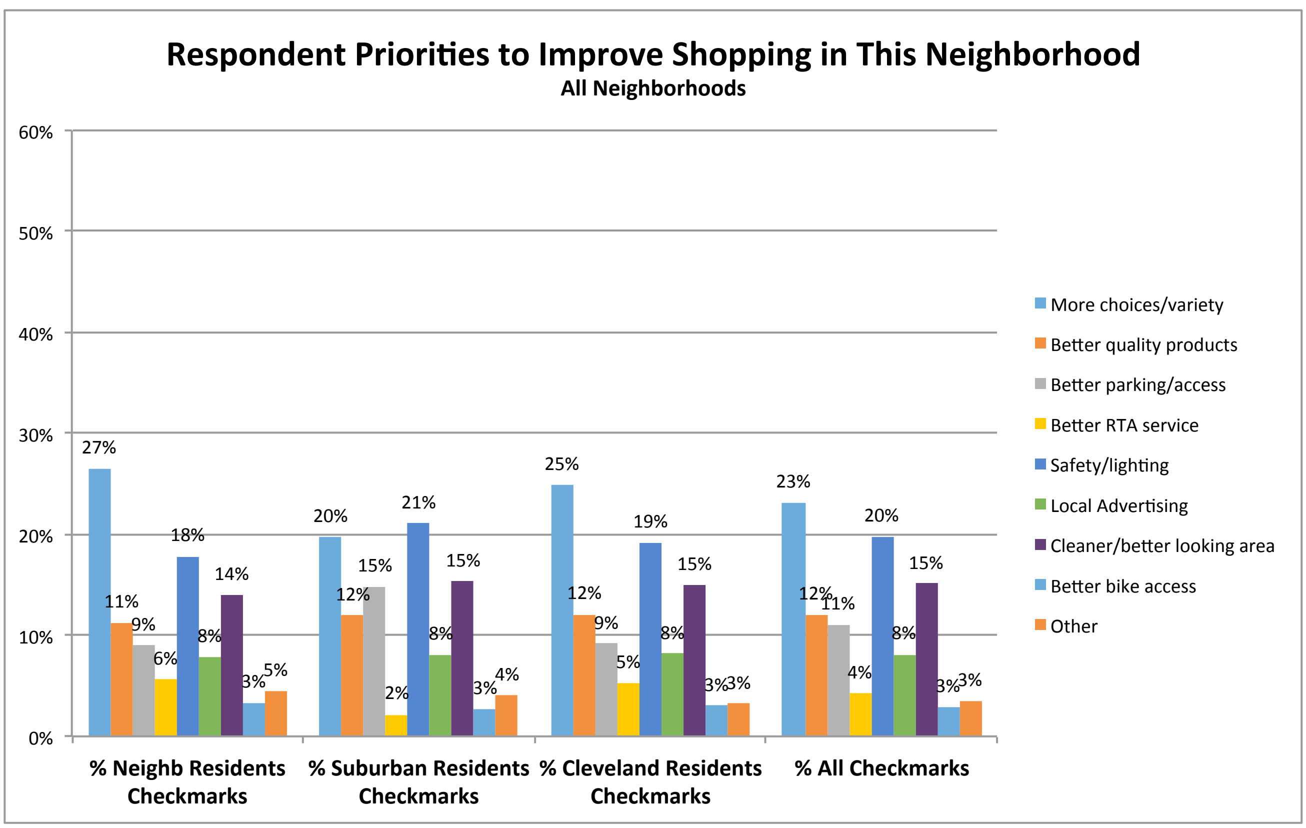
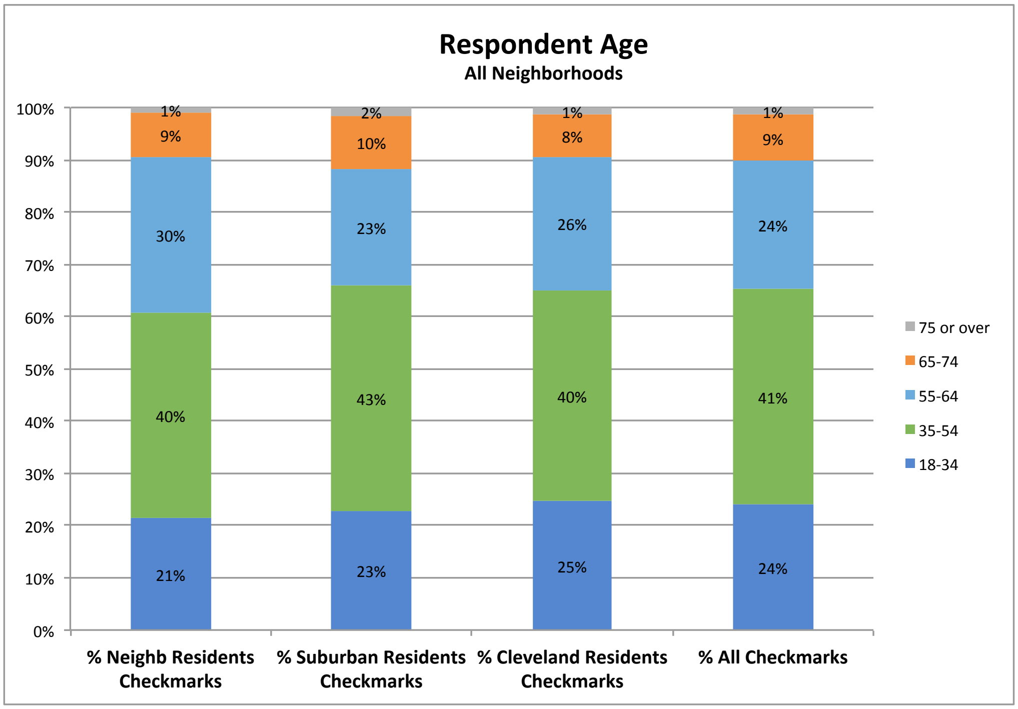


N: 235 234 447 681



N (no. of checkmarks): 692 593 1189 1782

4. Respondent Demographics



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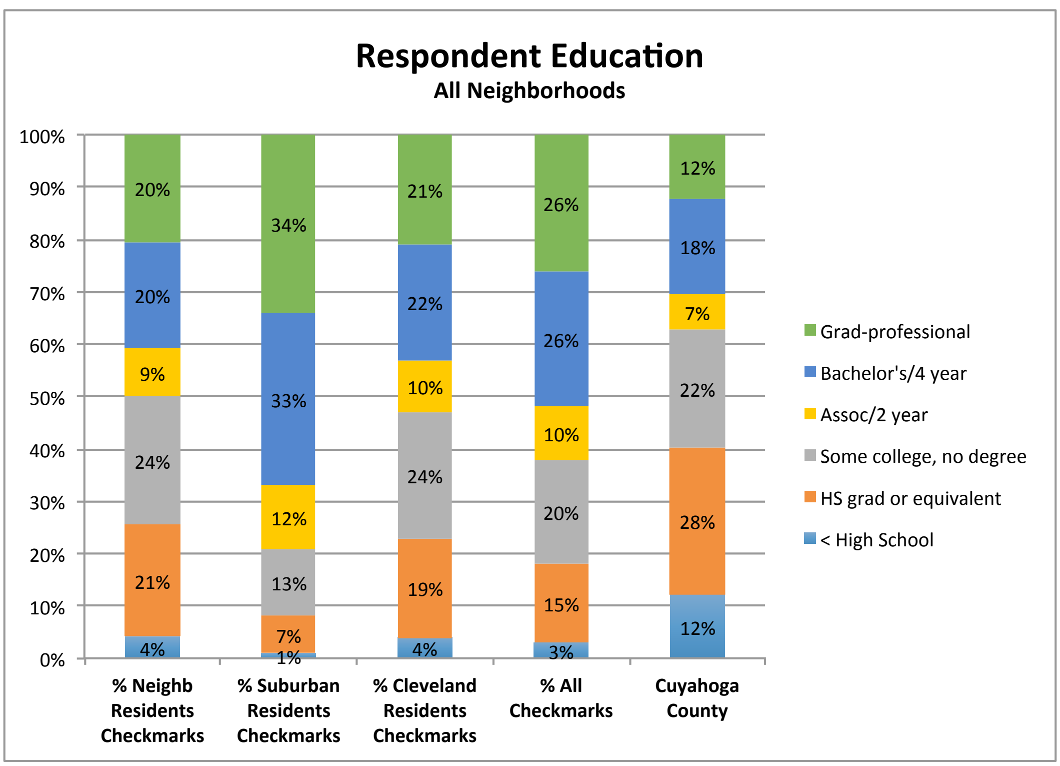

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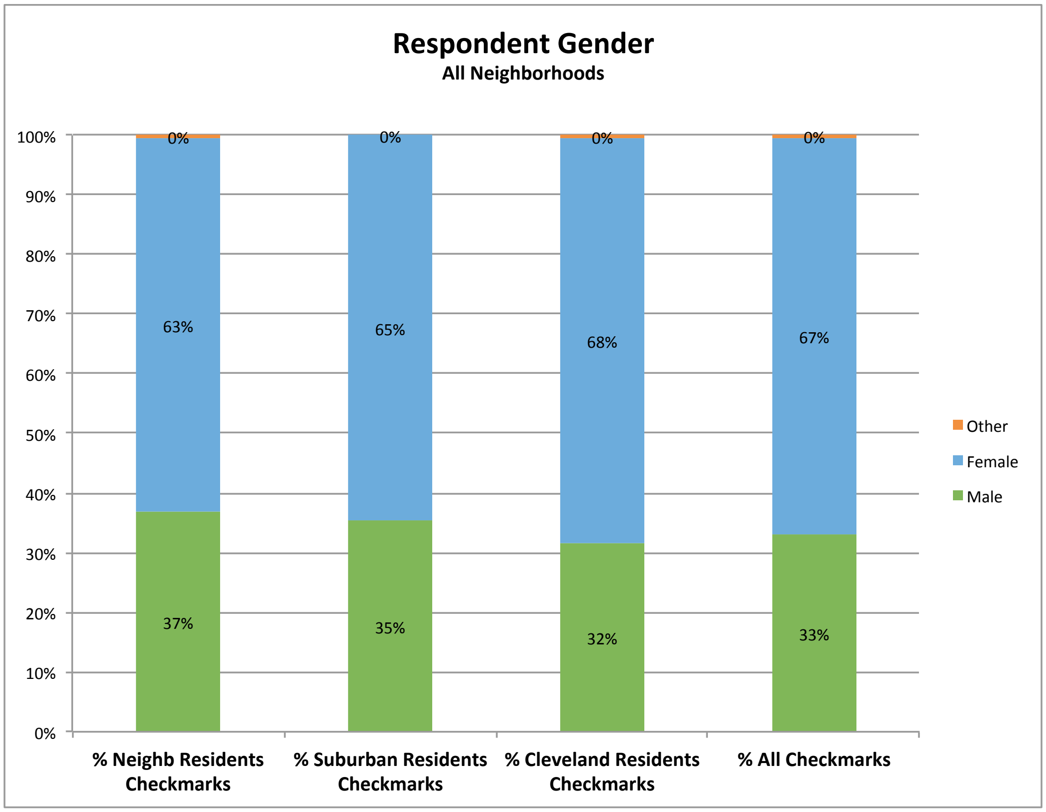

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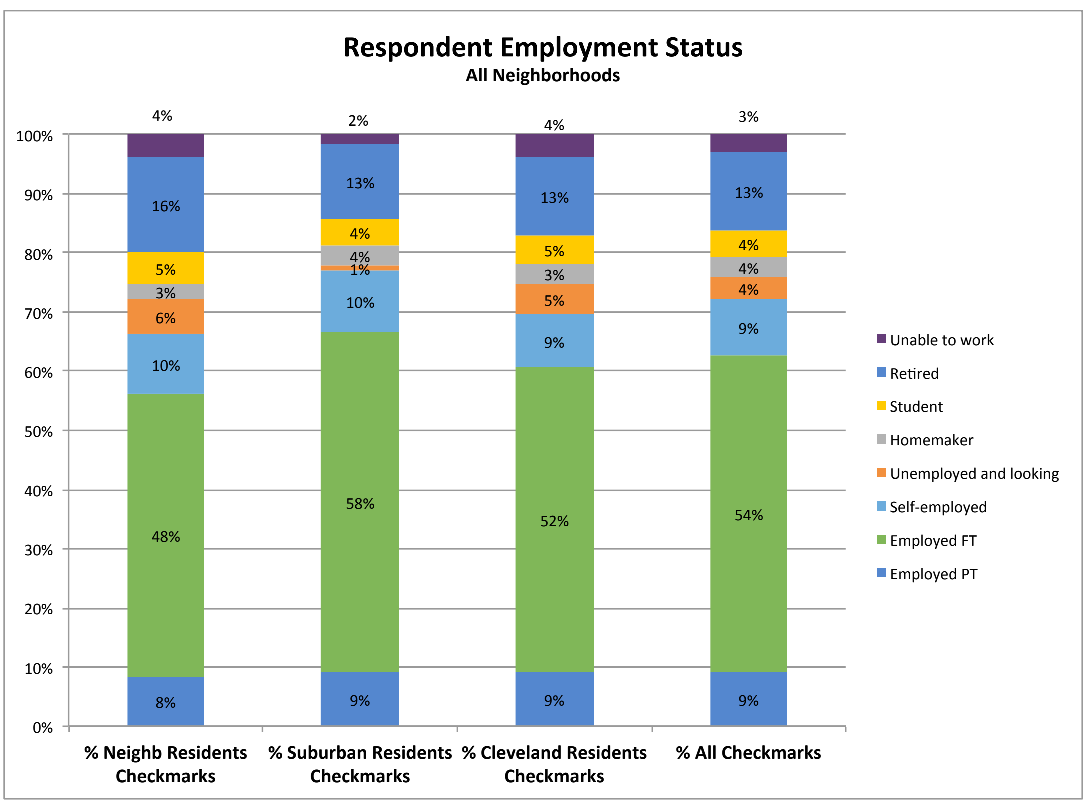

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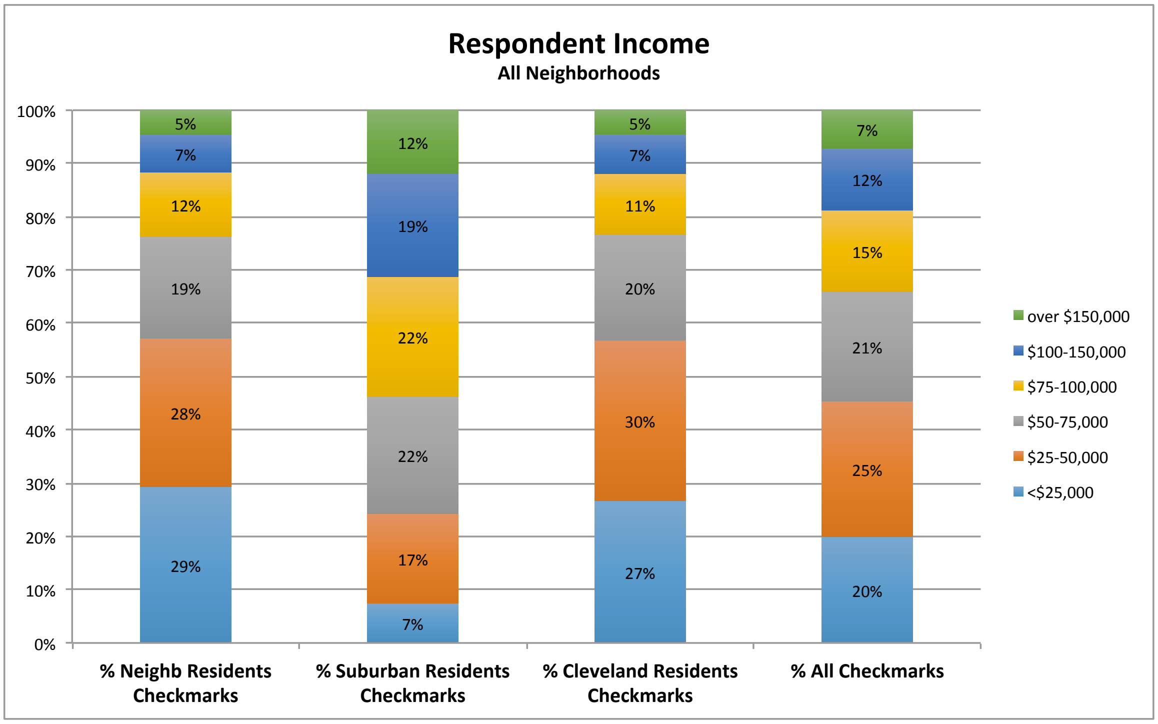

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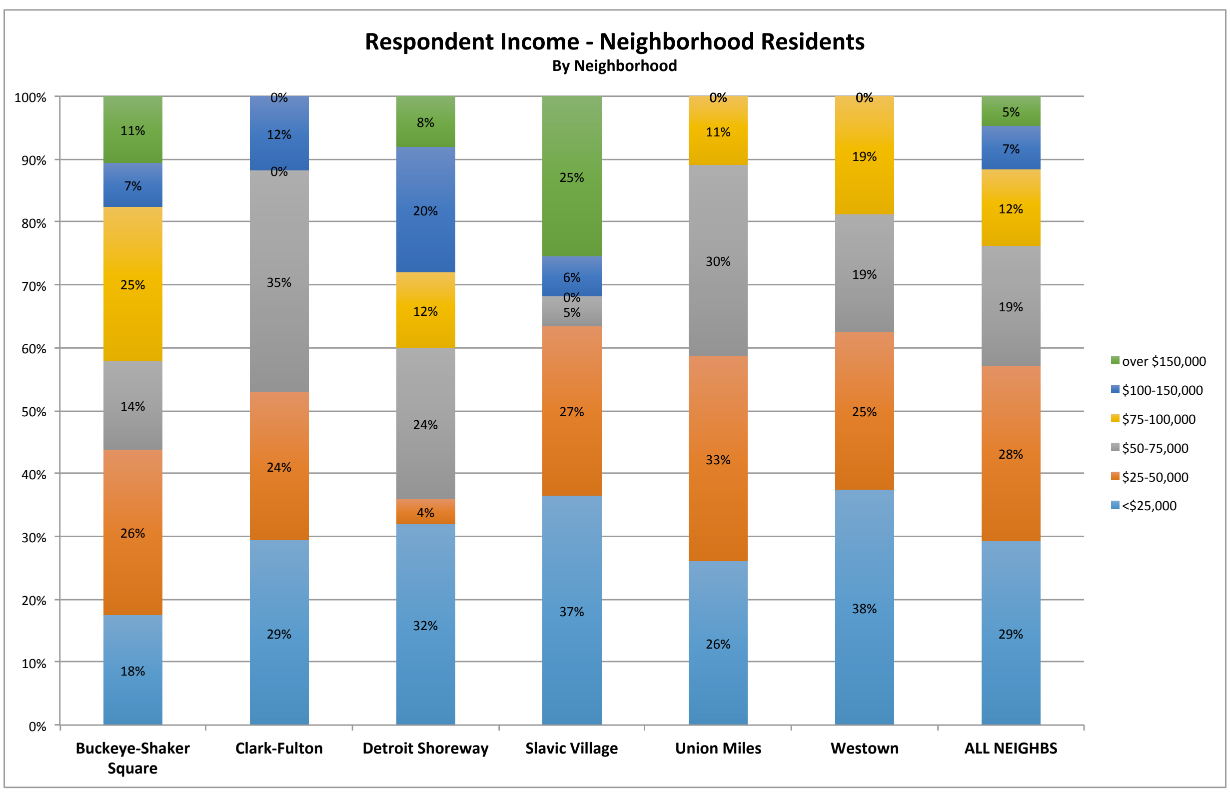
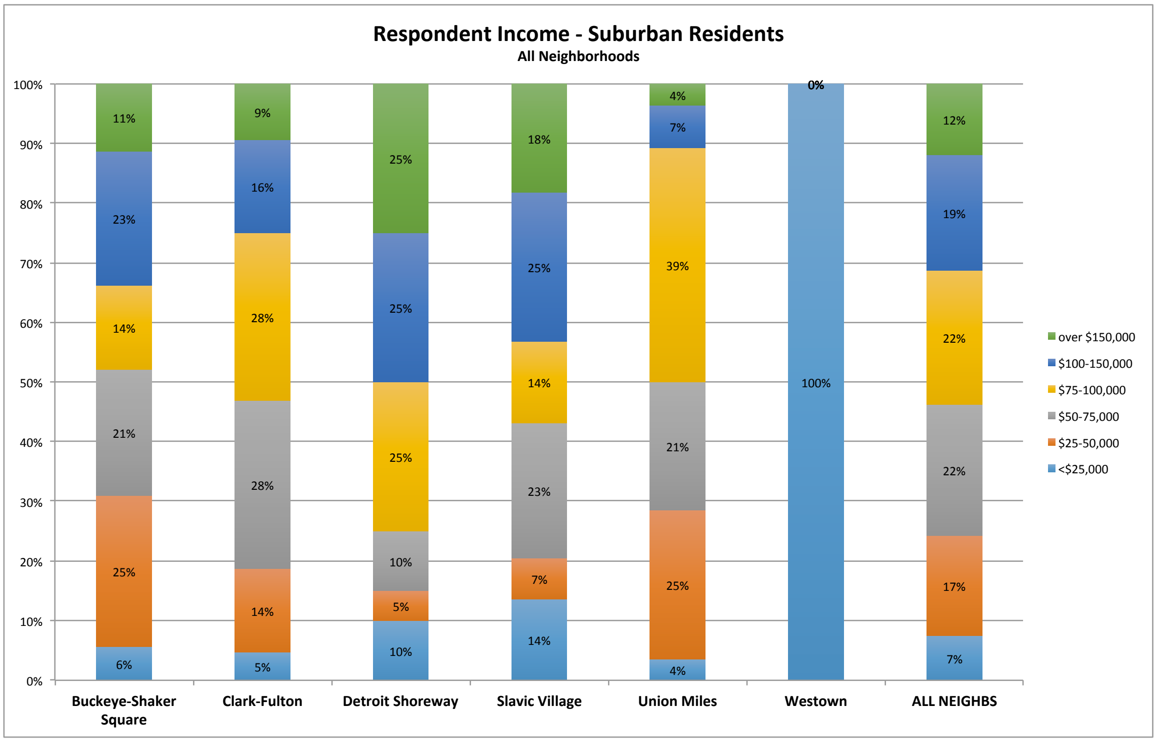


N: 57 17 25 63 46 16 215 (Note relatively small N)

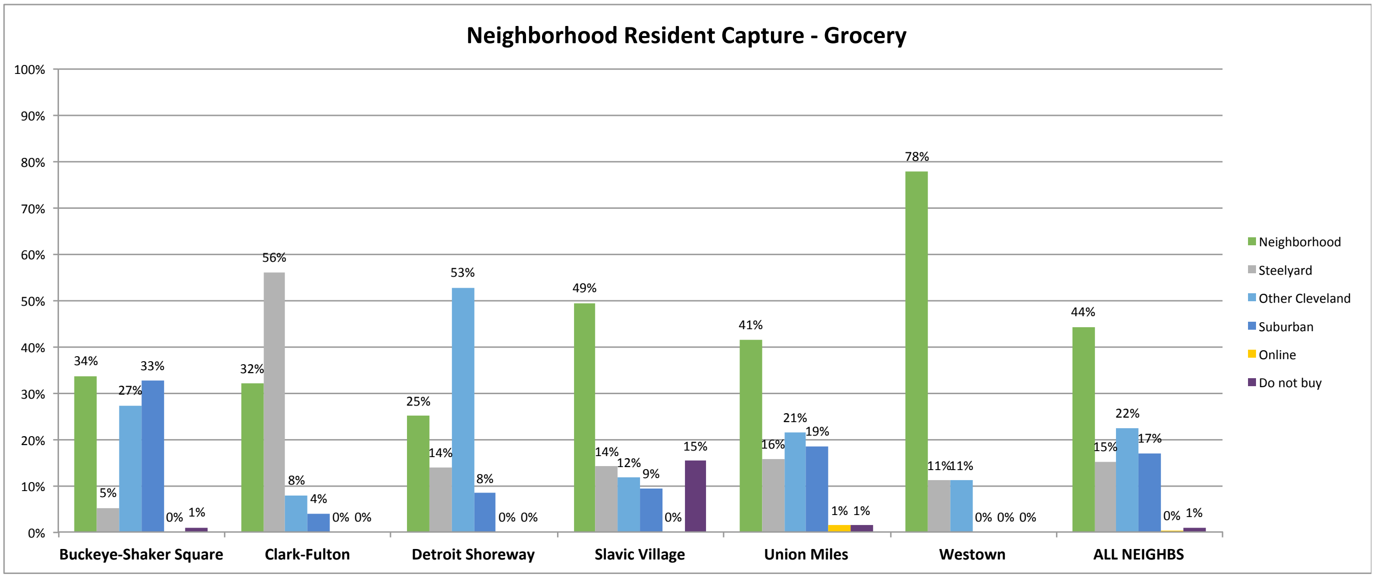


N: 71 64 20 44 28 1 227

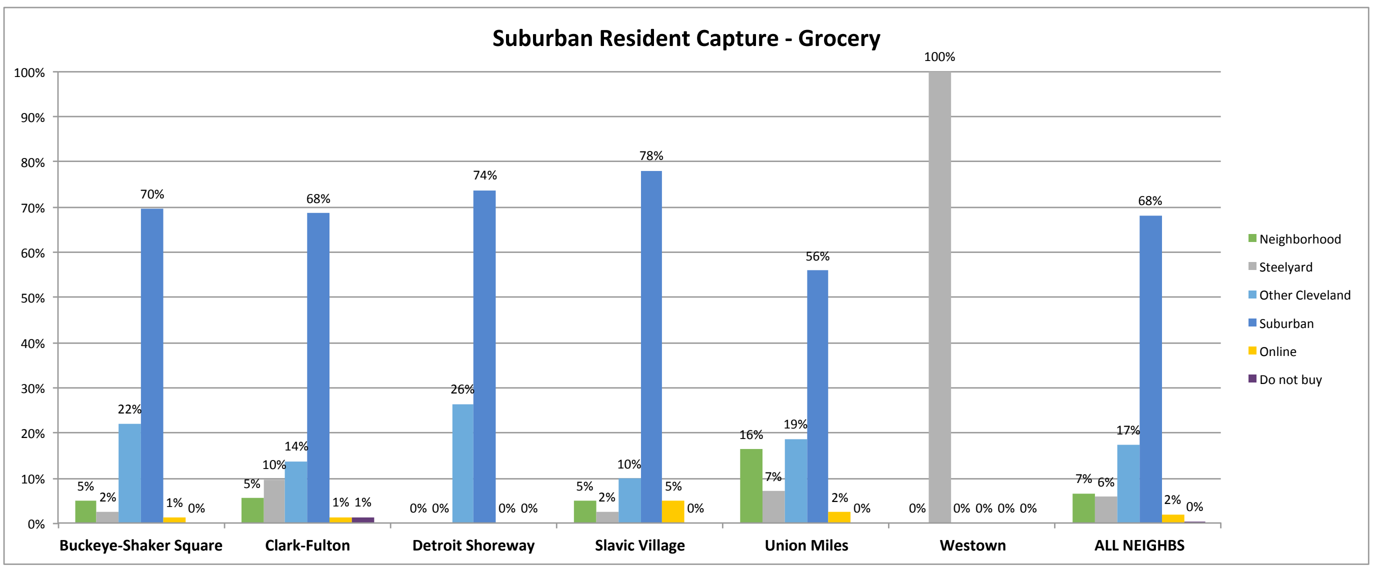
(Note relatively small N)

5. Capture: Neighborhood and Suburban Residents

As shown in the survey instrument at the end of this section, respondents were asked to place checkmarks in a matrix for all of the locations where they purchase goods. Locations included the specific neighborhood in question, other Cleveland shopping areas, suburban shopping areas, Steelyard Commons, and online. Goods in the matrix included grocery, health/beauty, clothing, books/music, auto supplies, and others, intended to provide information on the range of types of goods households might shop for. The total number of checkmarks were counted for each good and location. Responses were then aggregated by respondent zip code, and aggregated into neighborhood, other Cleveland, and suburban residence locations. See maps at the end of this section for zip codes selected for each neighborhood.



N (total checkmarks): 95 25 36 85 70 18 330



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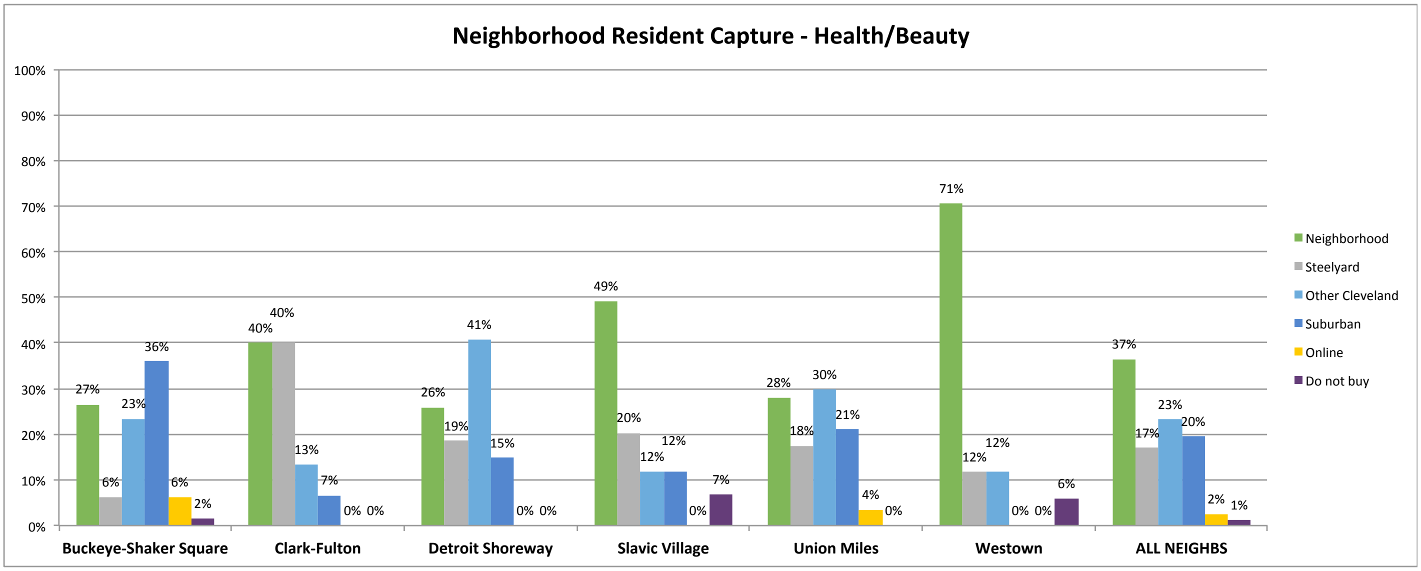

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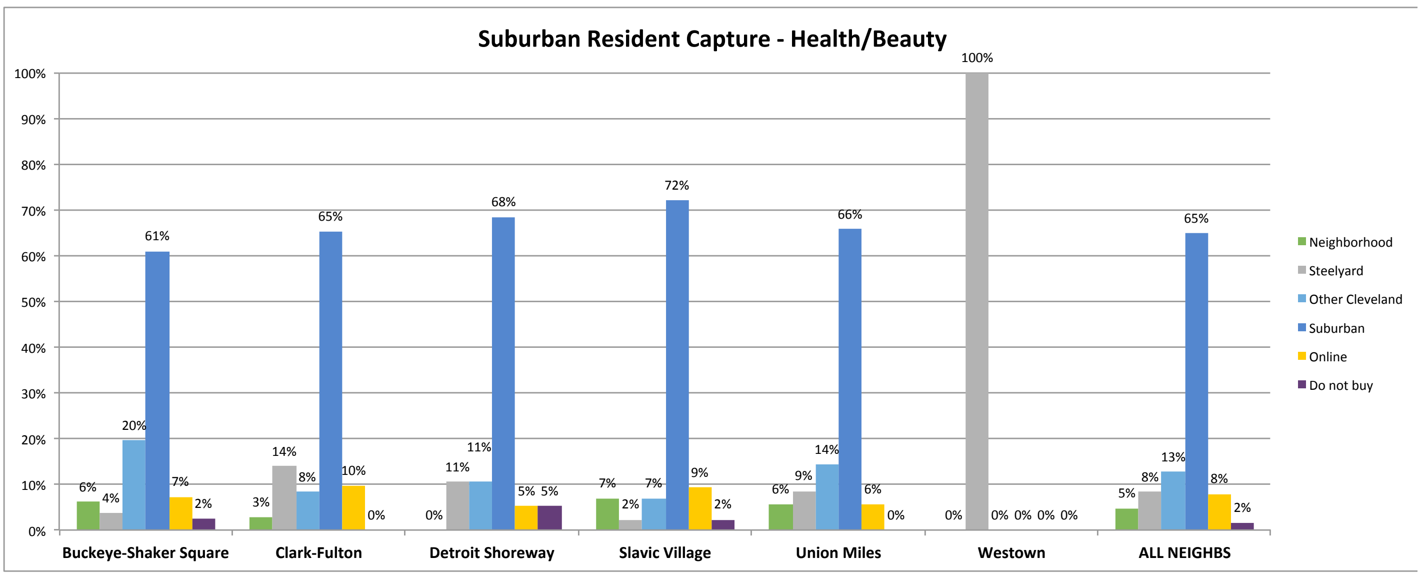
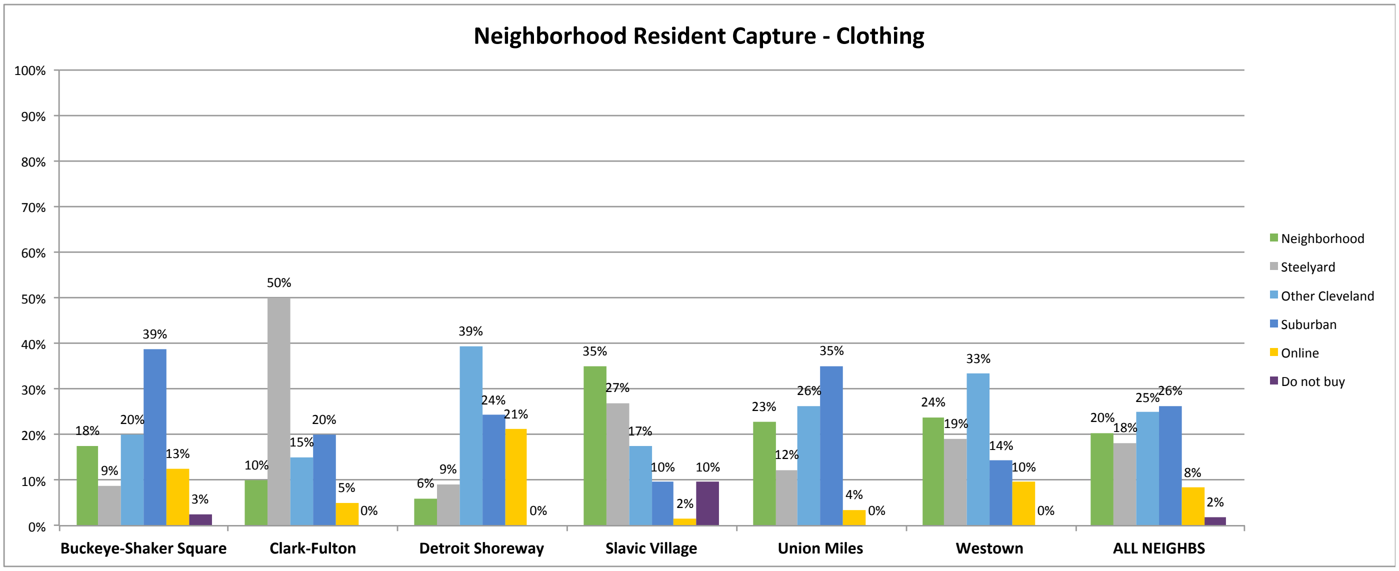
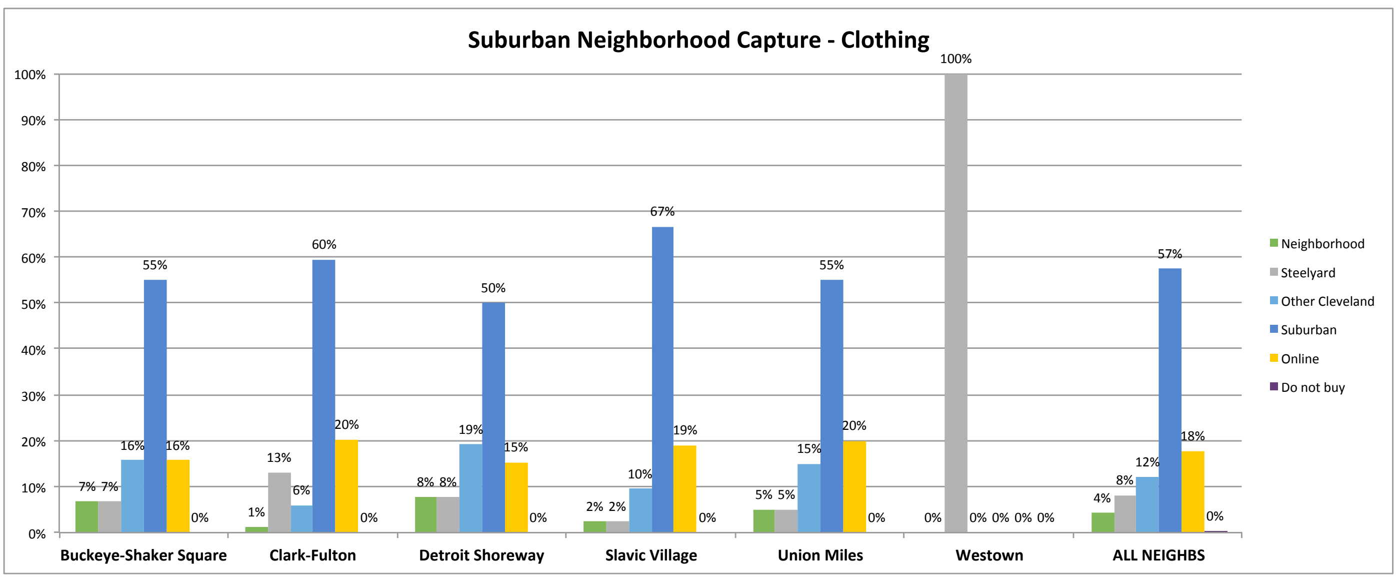


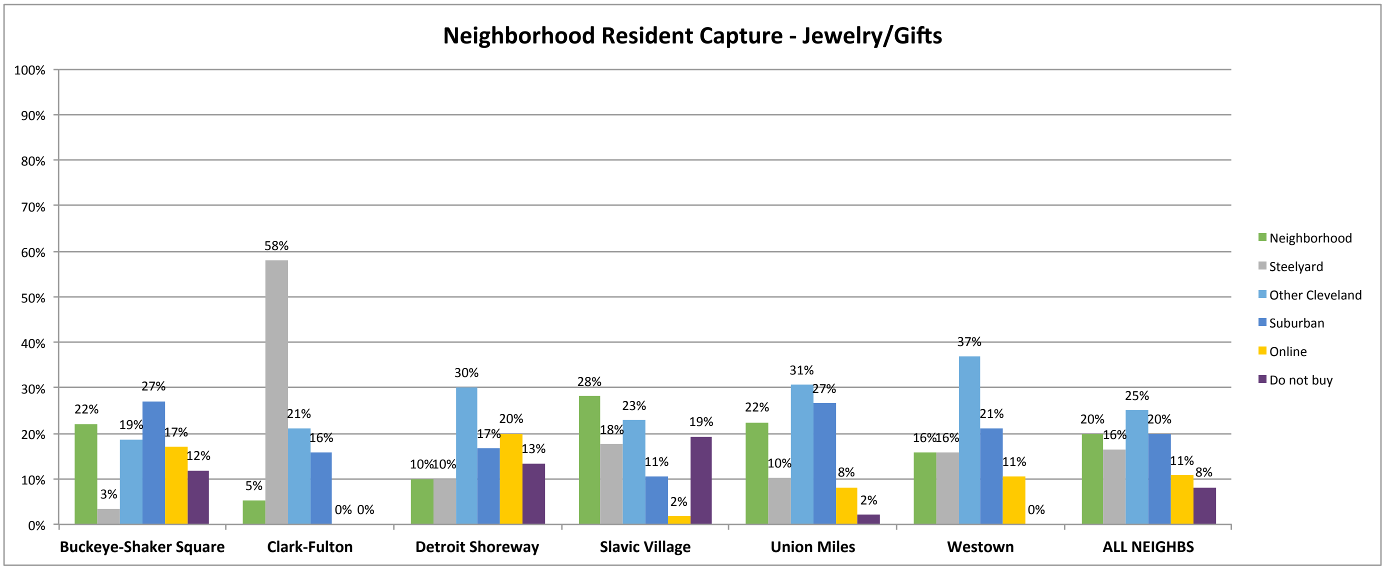
N (total checkmarks): 82 72 19 43 35 1 253



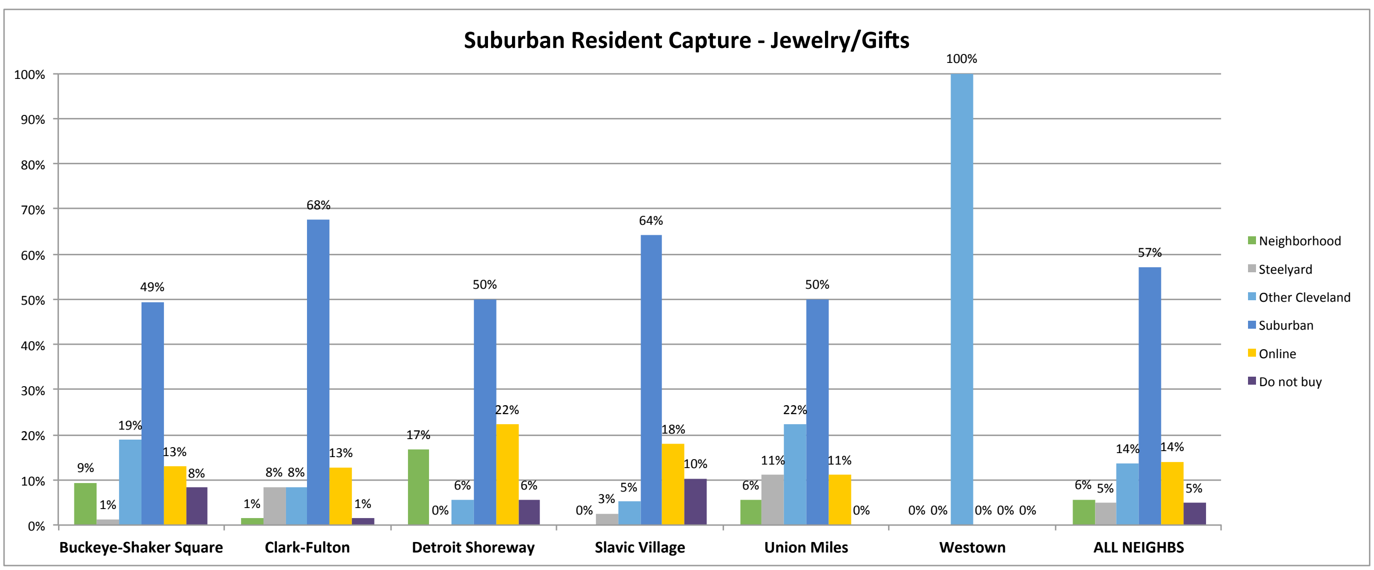
N (Total checkmarks): 80 20 33 63 57 21 274



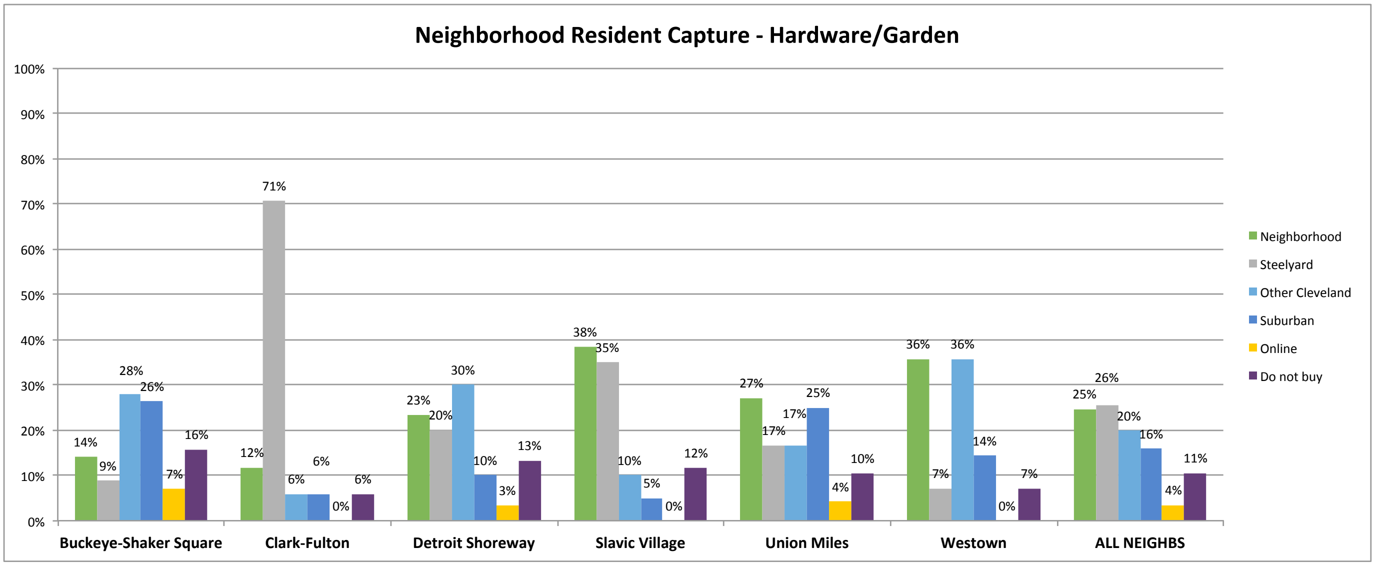
N: (total checkmarks): 89 84 26 42 40 1 282



N (total check marks): 59 19 30 57 49 19 232



N (total check marks): 85 71 18 39 36 1 249



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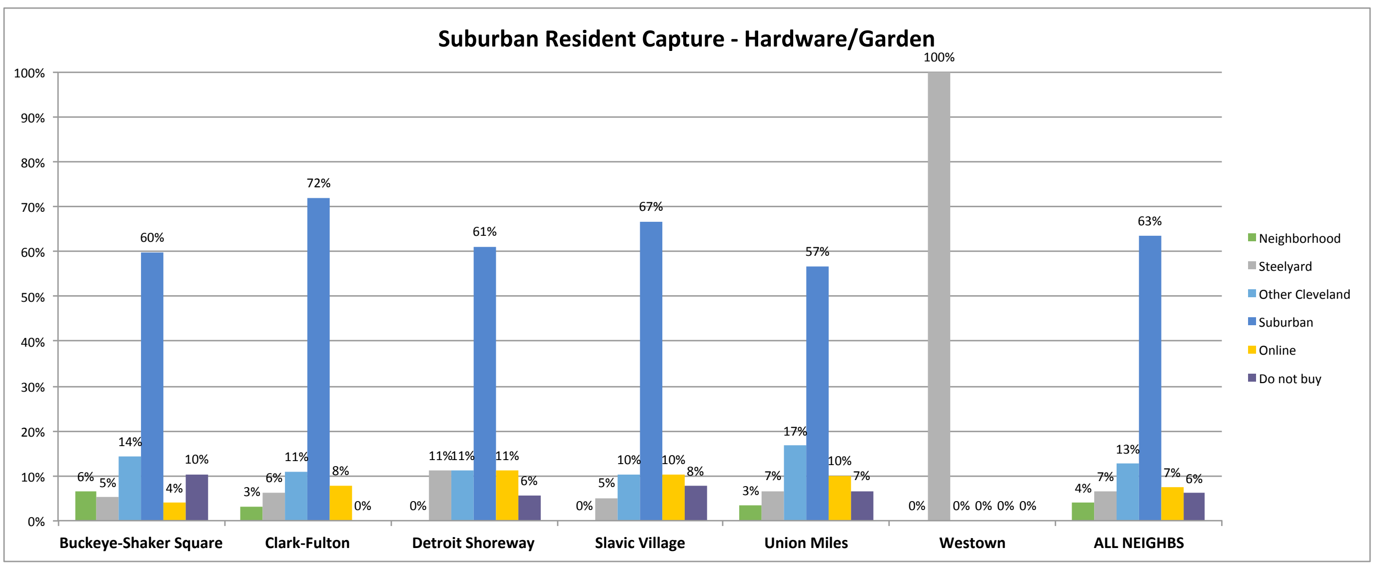

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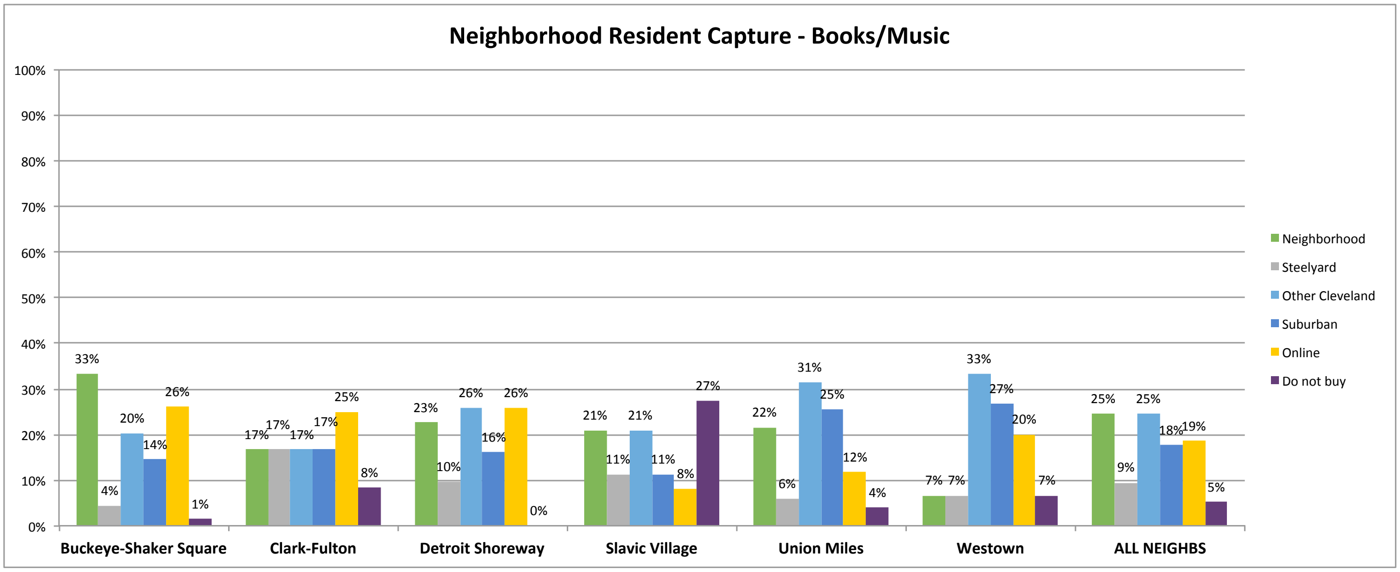

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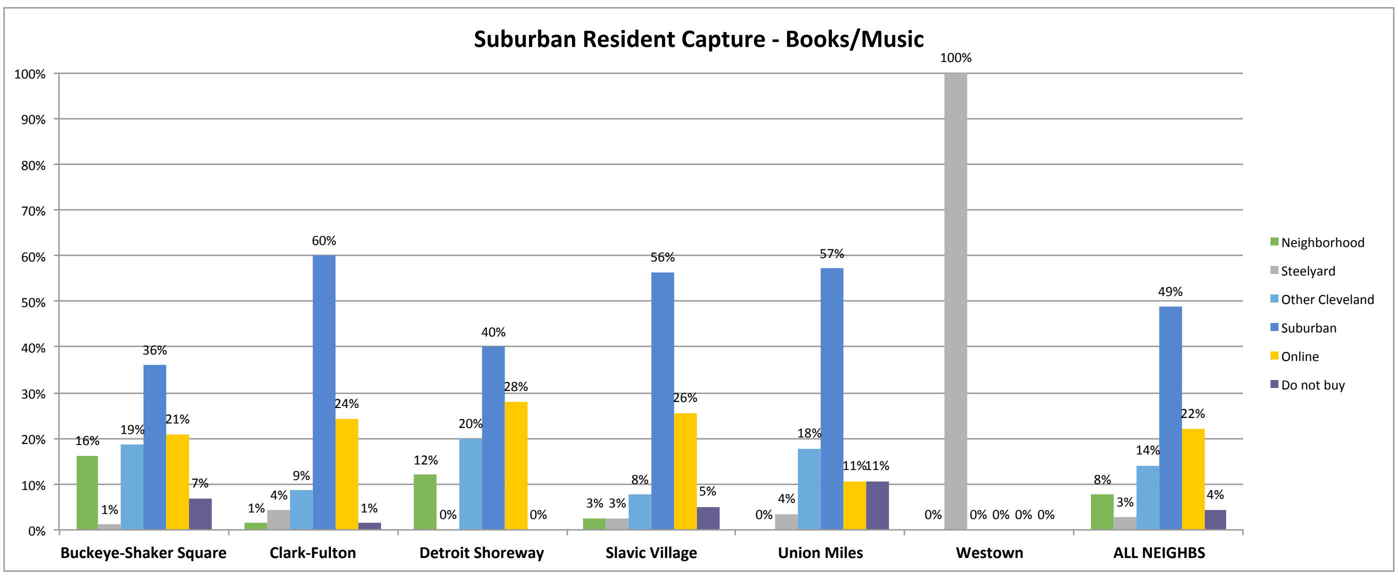

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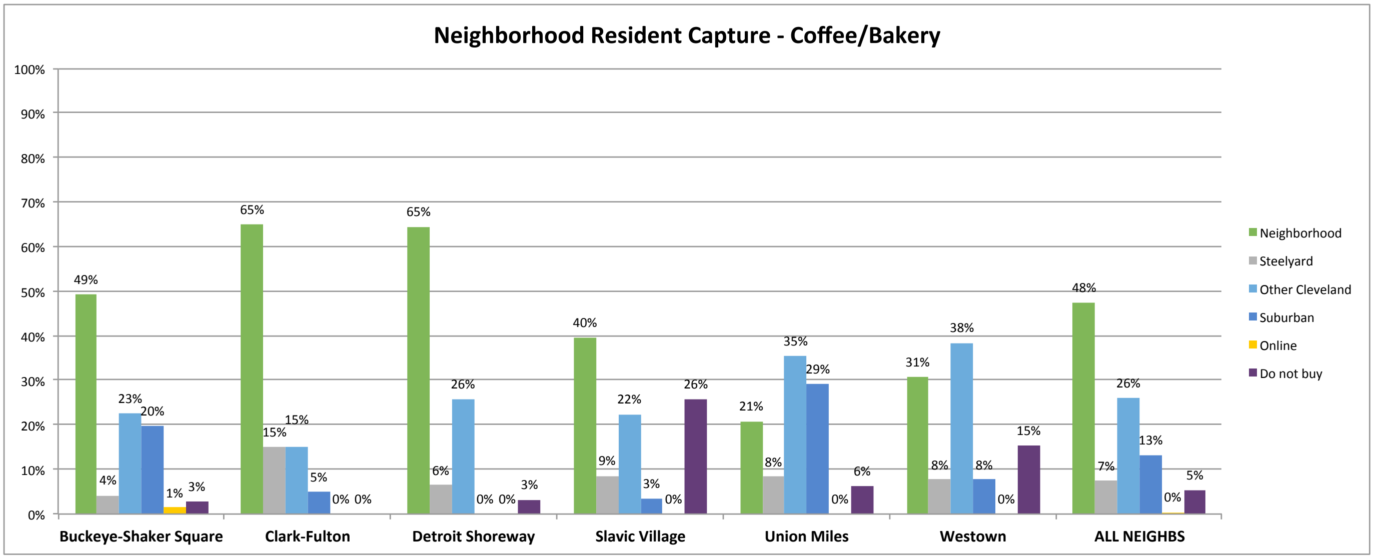
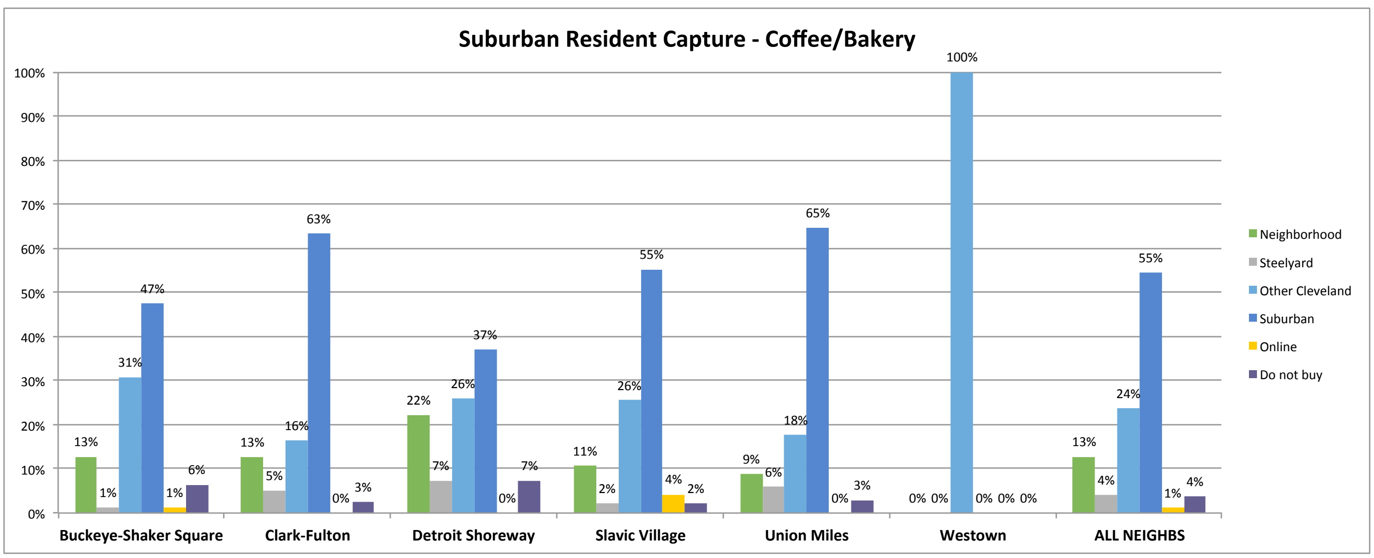
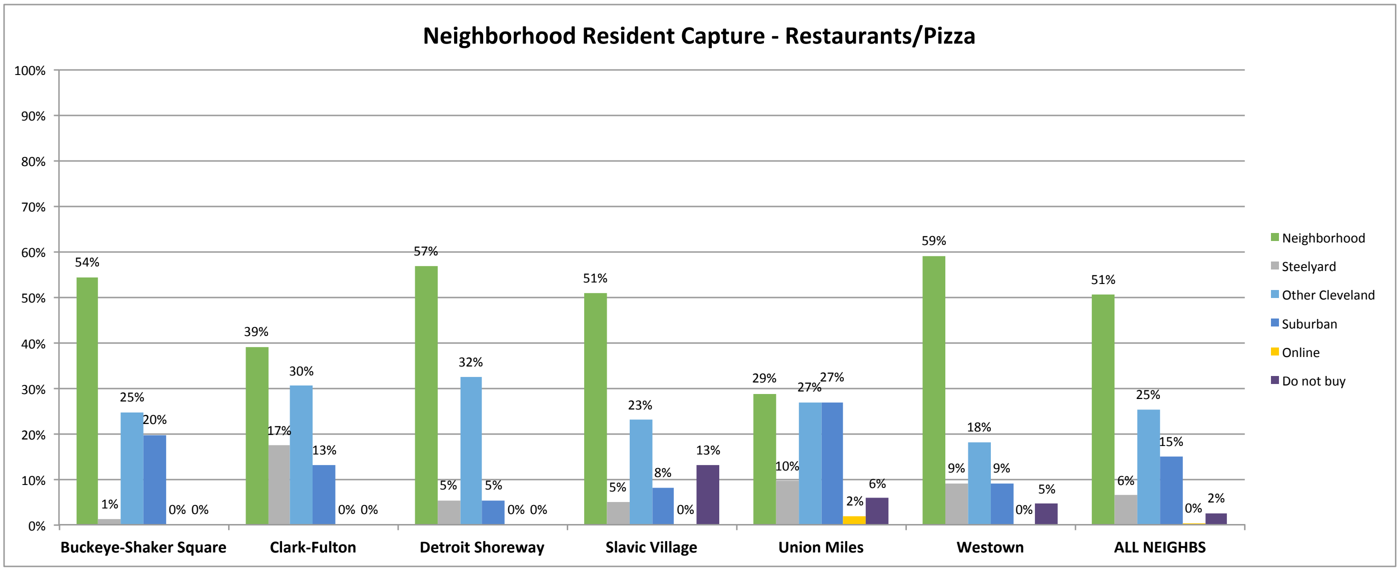


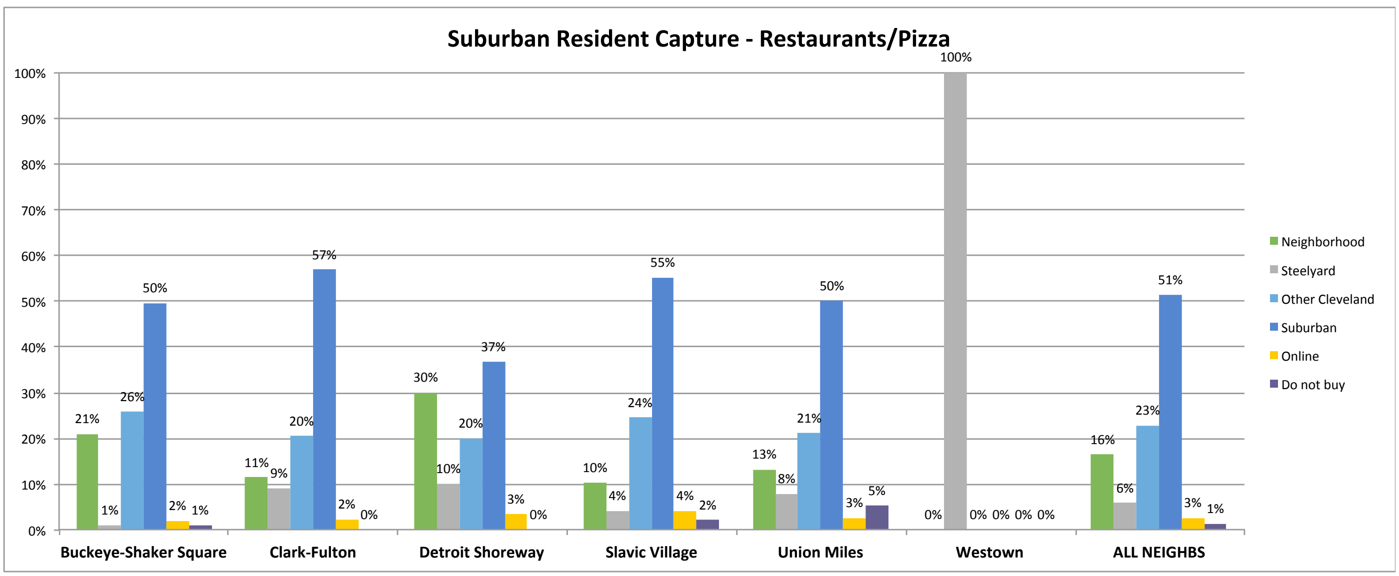
N (total checkmarks): 71 20 31 58 48 13 242



N (total checkmarks): 78 79 27 47 34 1 266



N (total checkmarks): 81 23 37 61 52 22 281



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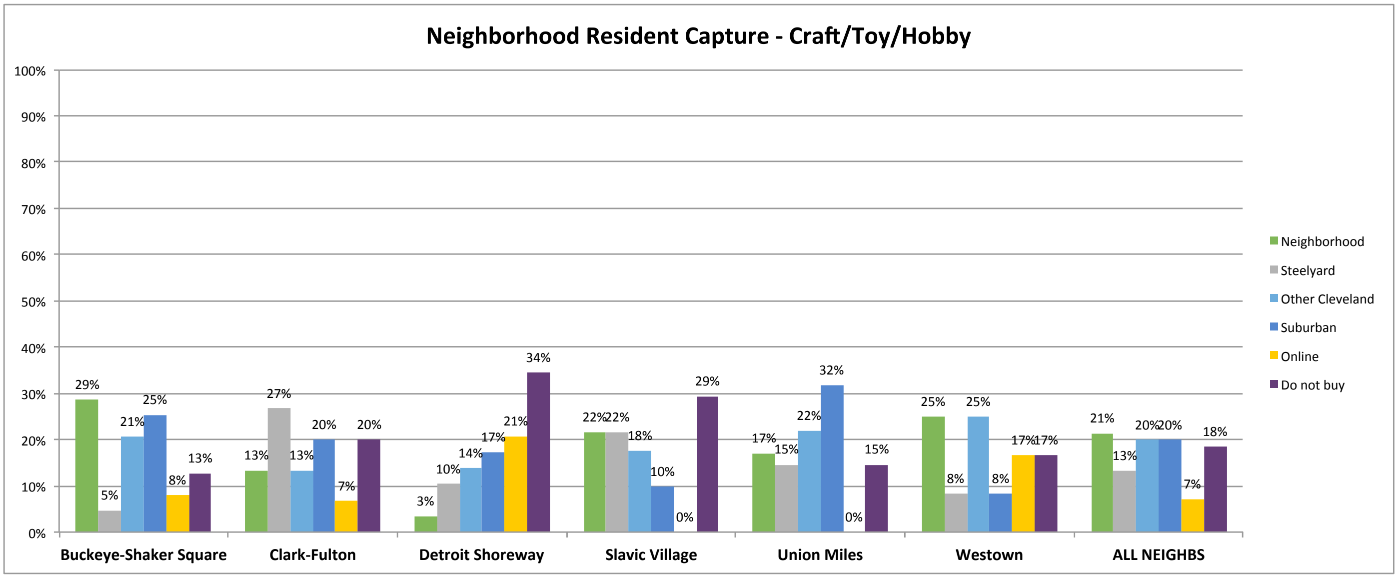

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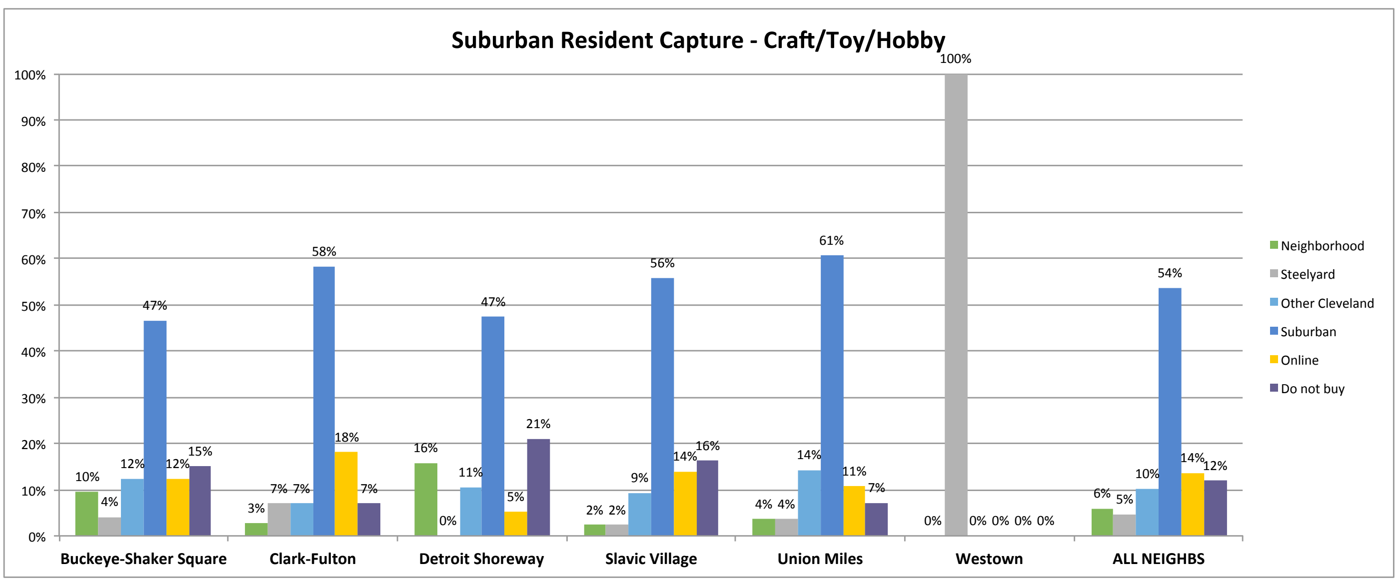

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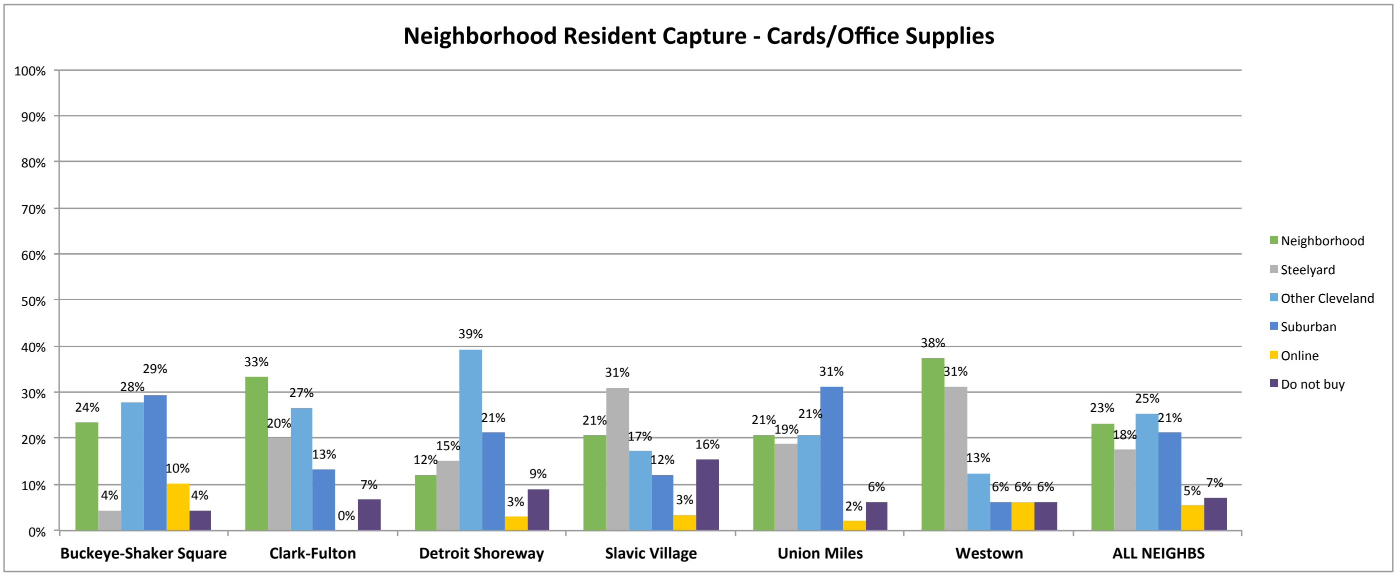
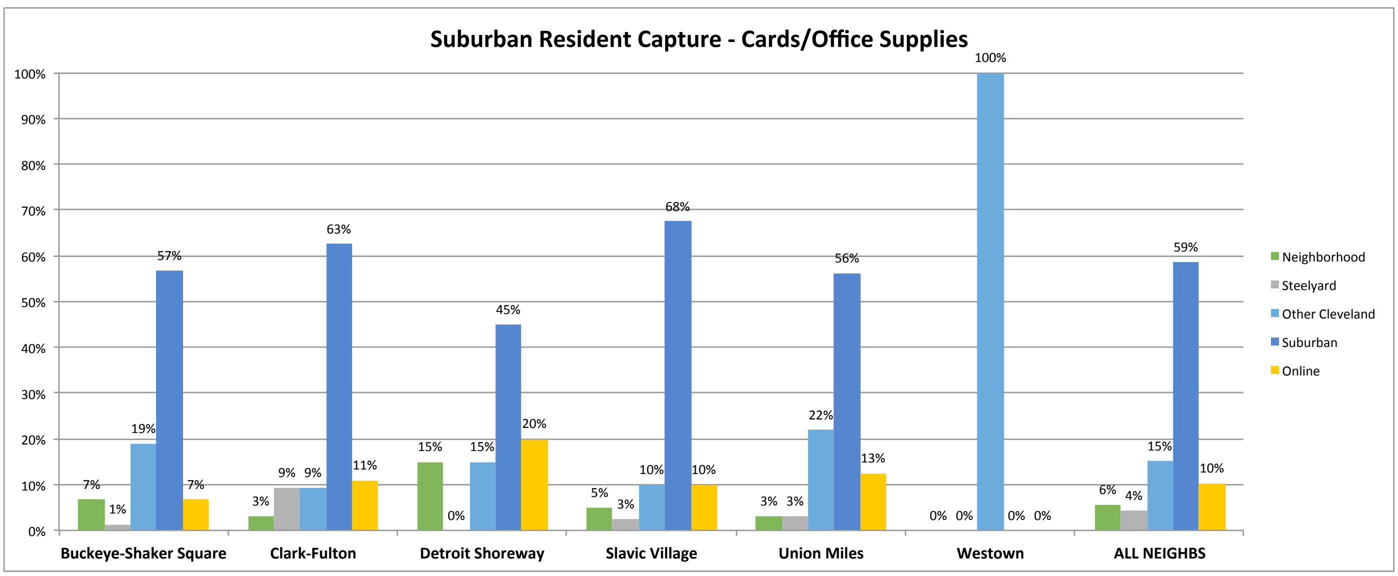
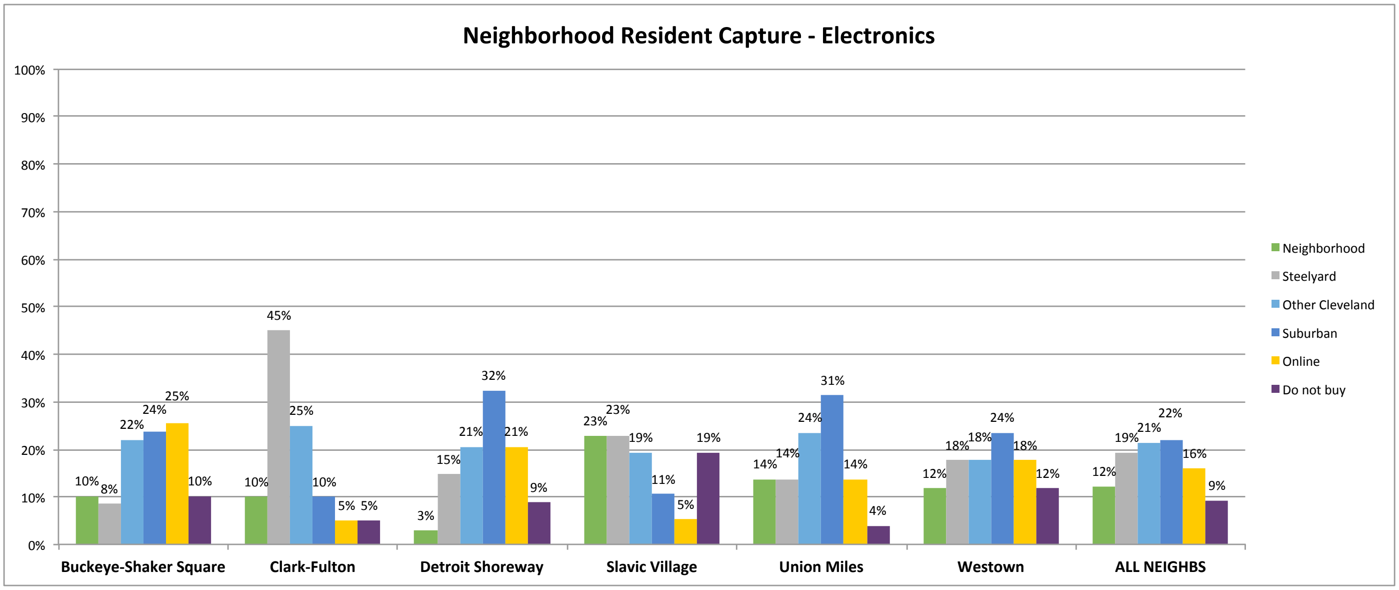


N (total checkmarks): 68 15 33 58 48 16 240



N (total checkmarks): 74 64 20 40 32 1 232



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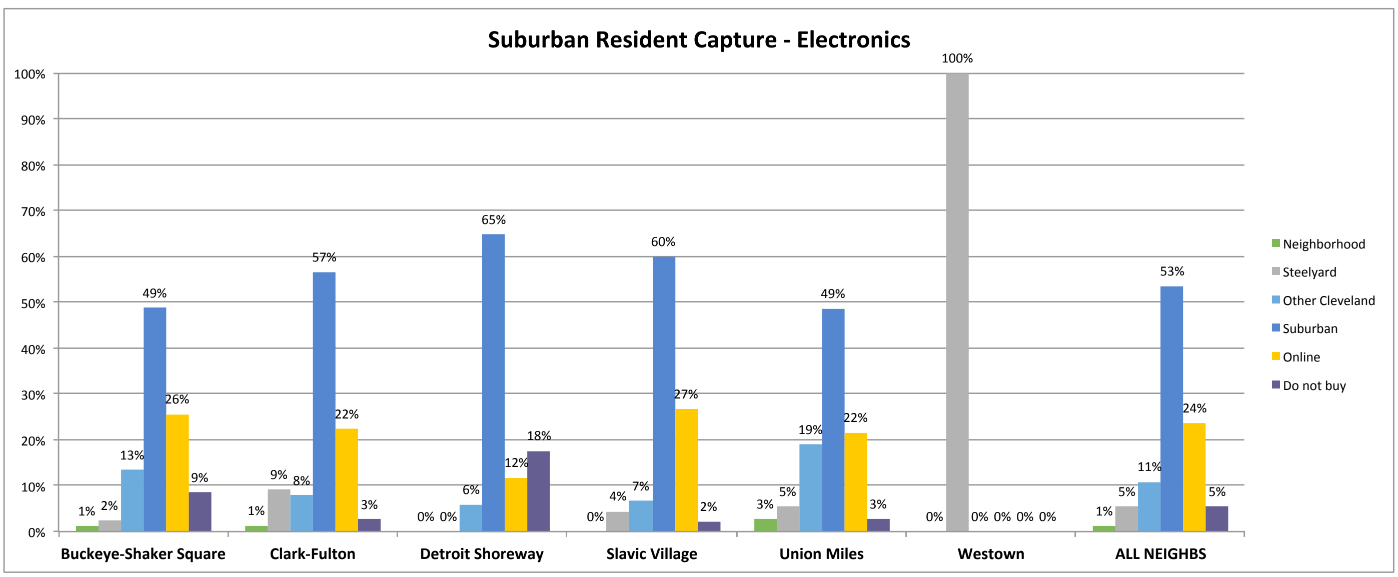
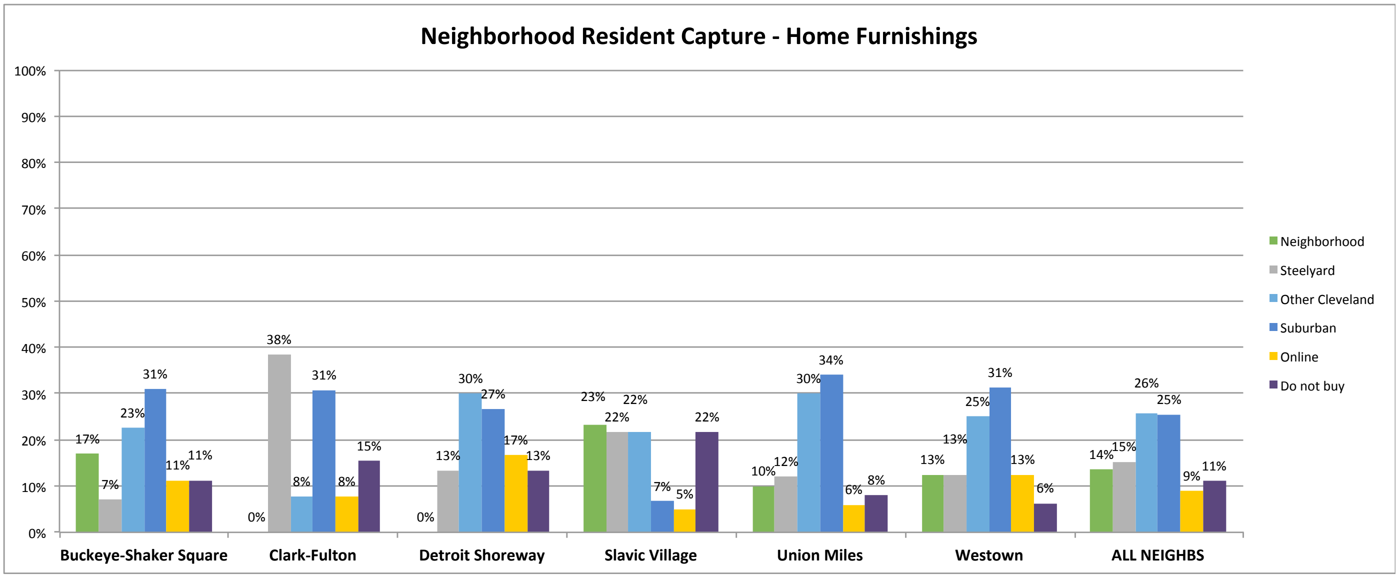


N (total checkmarks): 82 76 17 45 37 1 258



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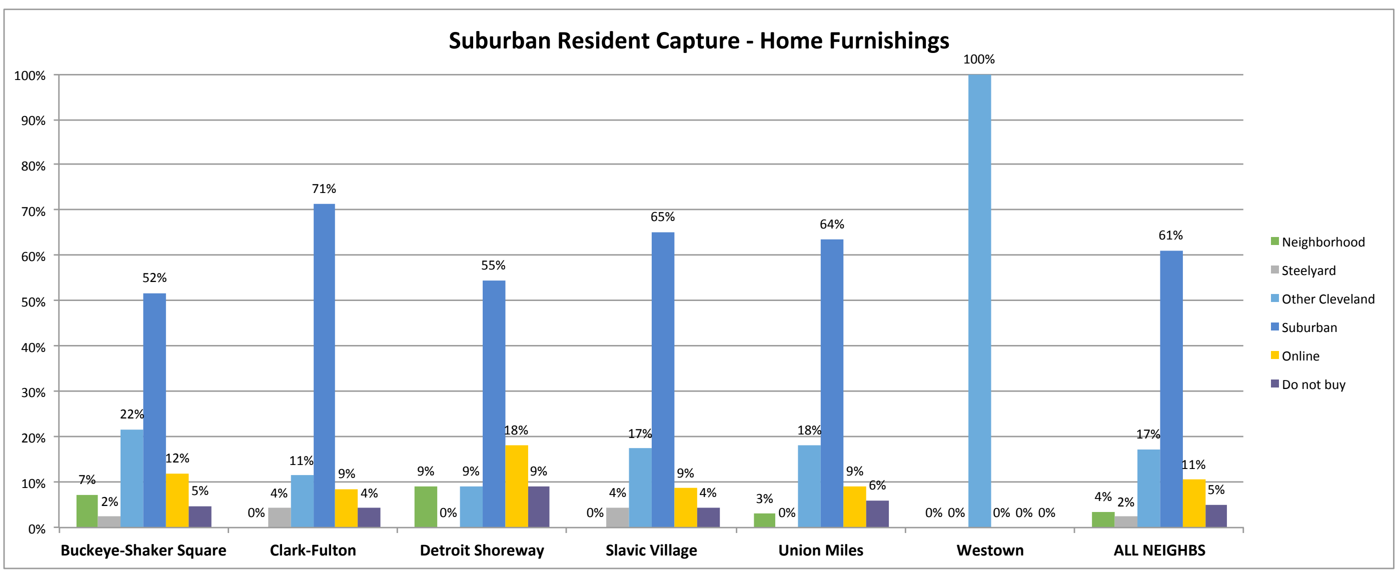
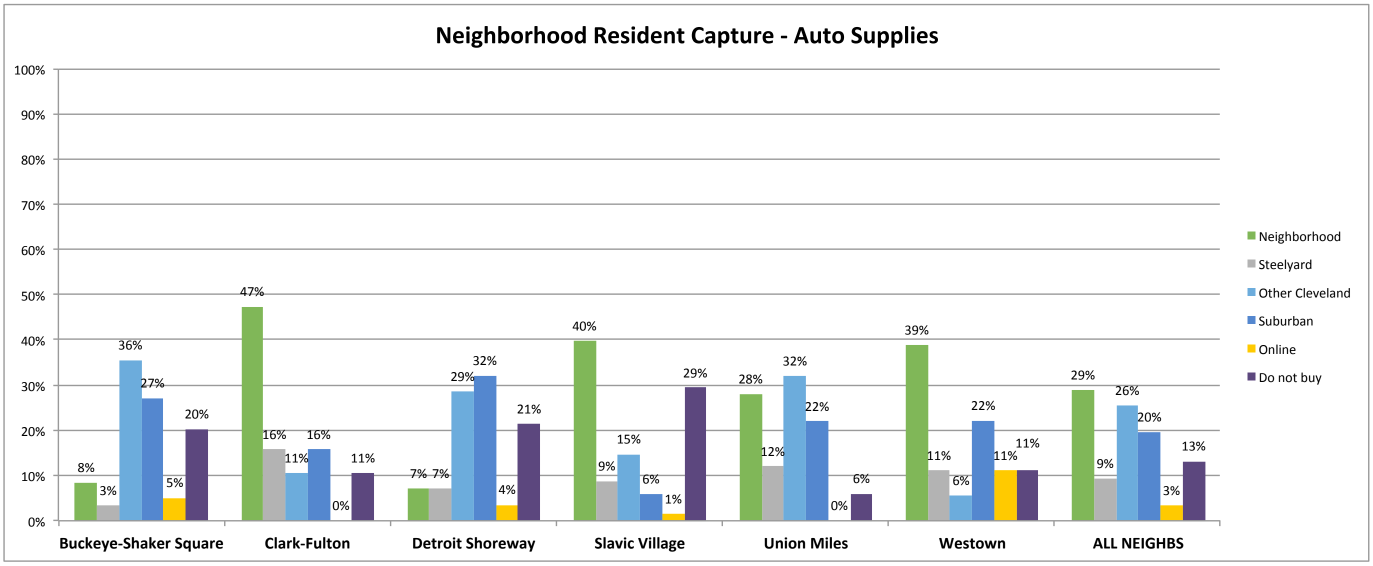
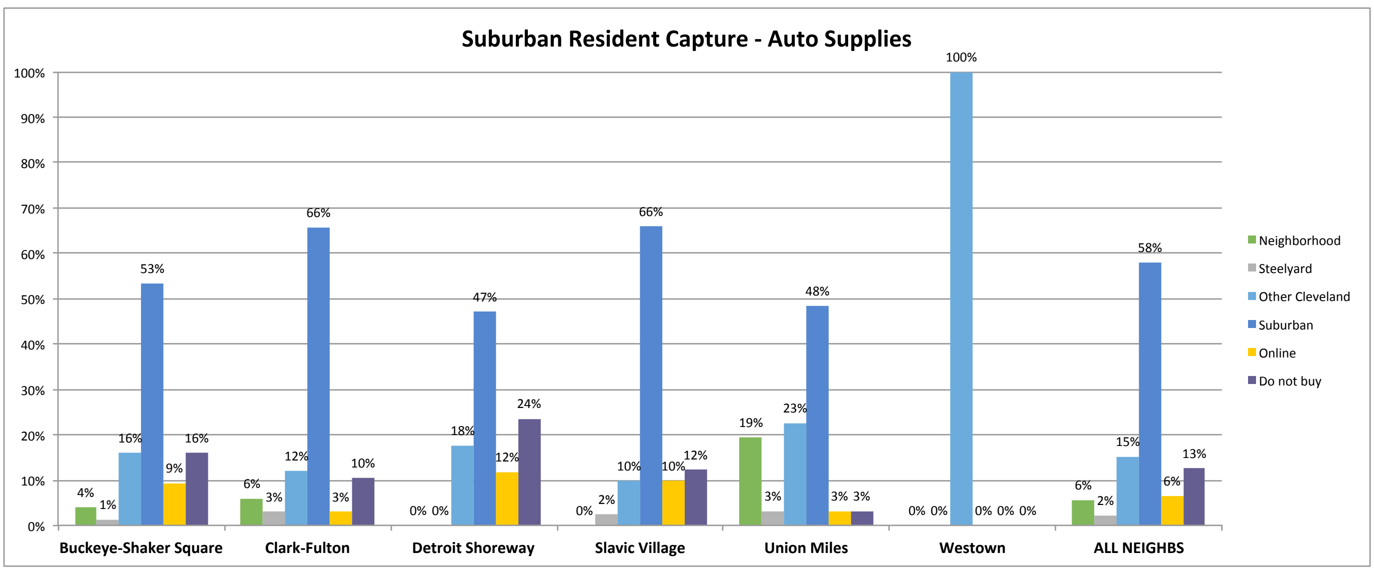


N (total checkmarks): 83 70 22 46 33 1 255



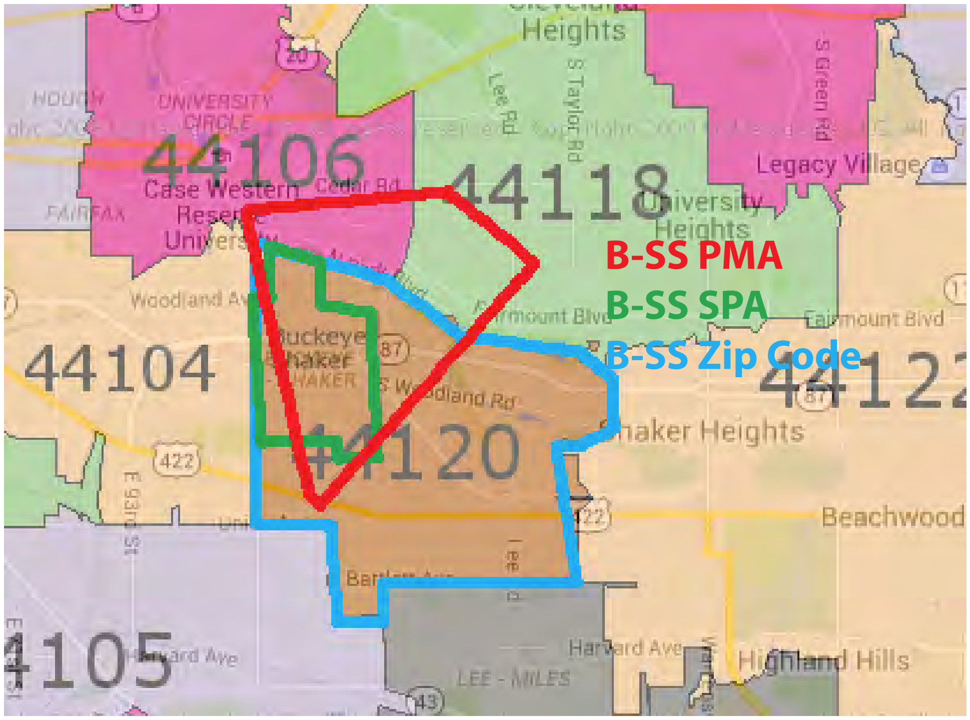
N (total checkmarks): 59 19 28 68 50 18 235



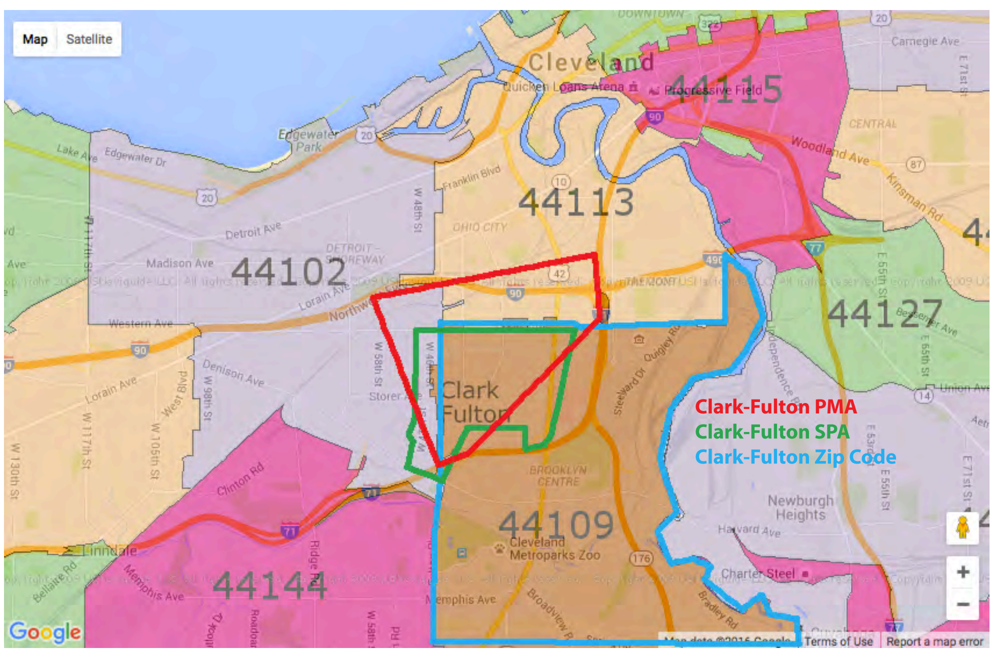
N (total checkmarks): 75 67 17 41 31 1 231

6. Neighborhood Zip Code Selection

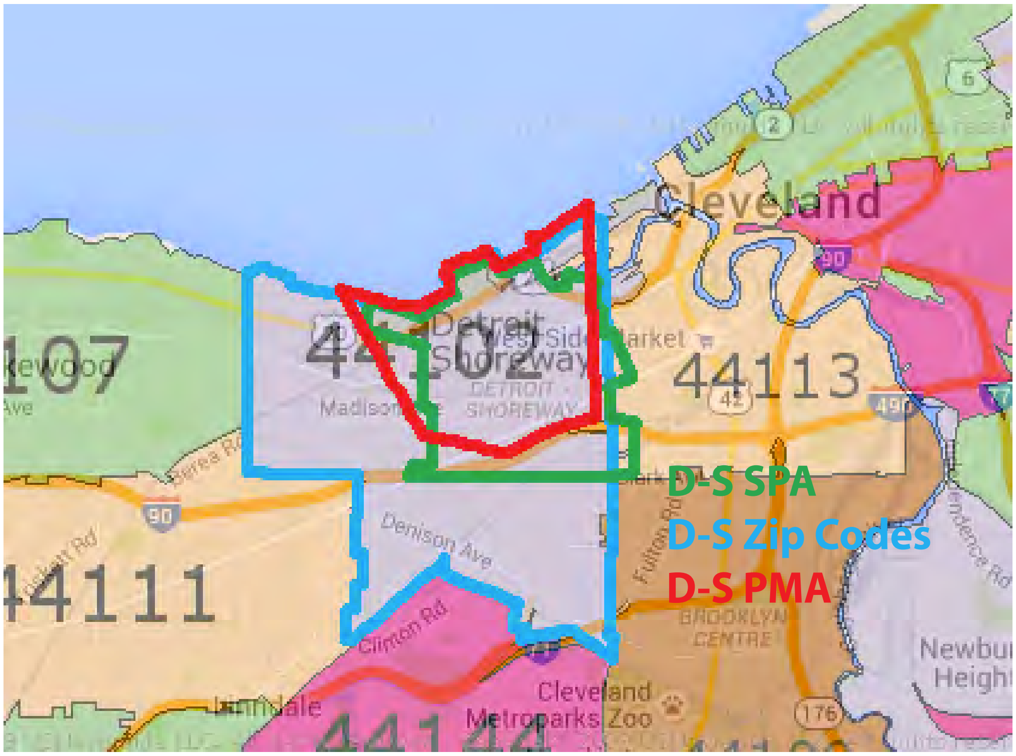
Zip codes are the easiest, least objectionable, and most efficient way to obtain residence identification from survey respondents. However zip code boundaries are not ideal, because they do not line up with other data boundaries, such as SPAs, census tracts/blocks, and in this case, PMA parameters. Some judgment is involved. These maps illustrate zip codes classified as "local neighborhood residents" for each neighborhood (in blue) – compared to the Cleveland City Planning Commission SPA boundary (green), and the Primary Market Area (PMA) defined in this study (red). These zip code boundaries were used in visitor zip code analysis (see next section) and capture analysis (previous section).



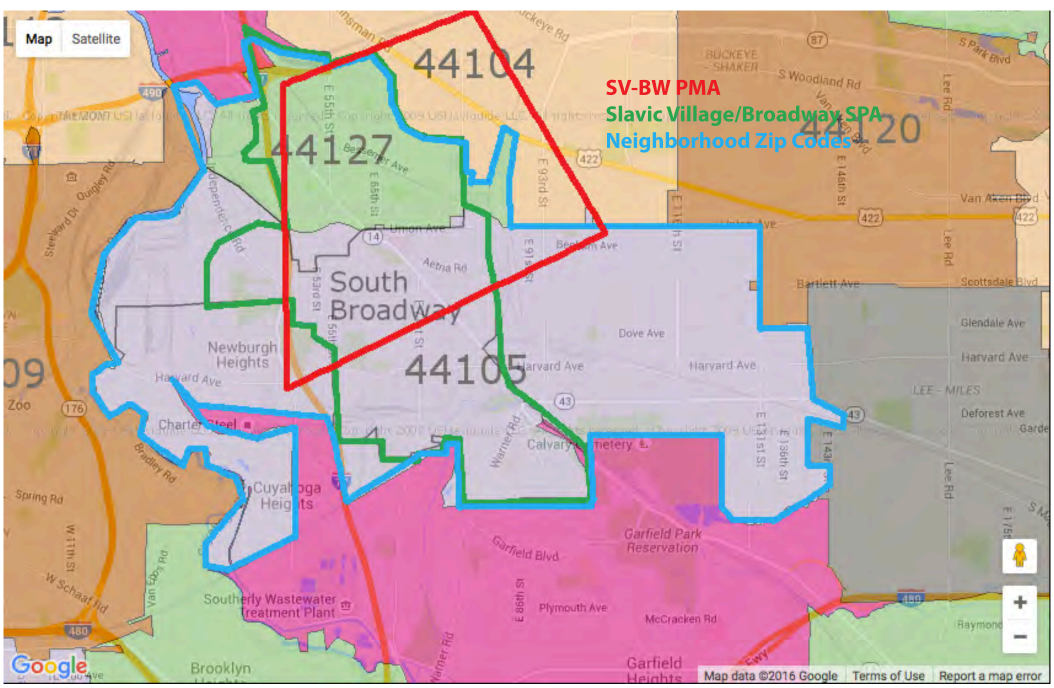
BUCKEYE-SHAKER SQUARE



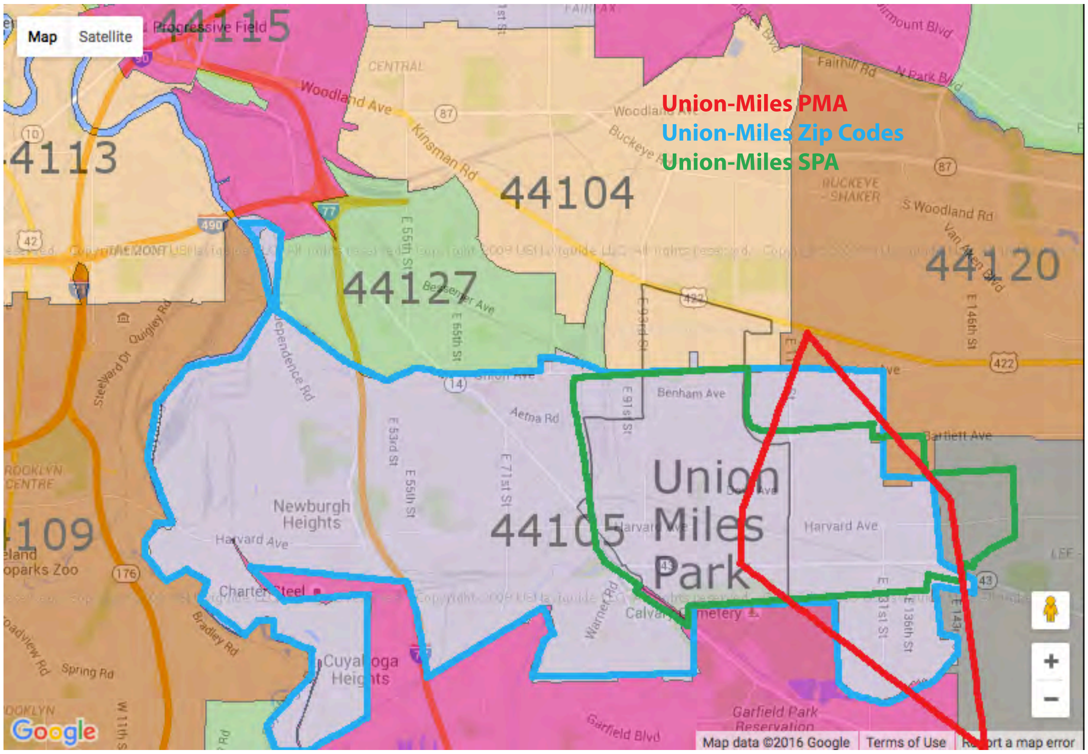
CLARK-FULTON



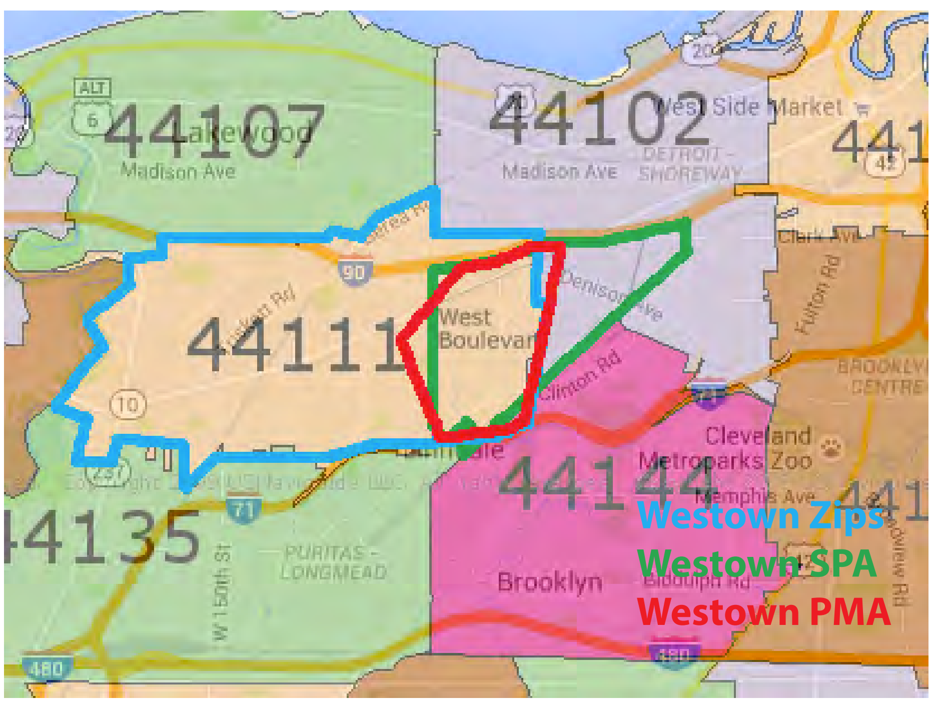
DETROIT-SHOREWAY



SLAVIC VILLAGE

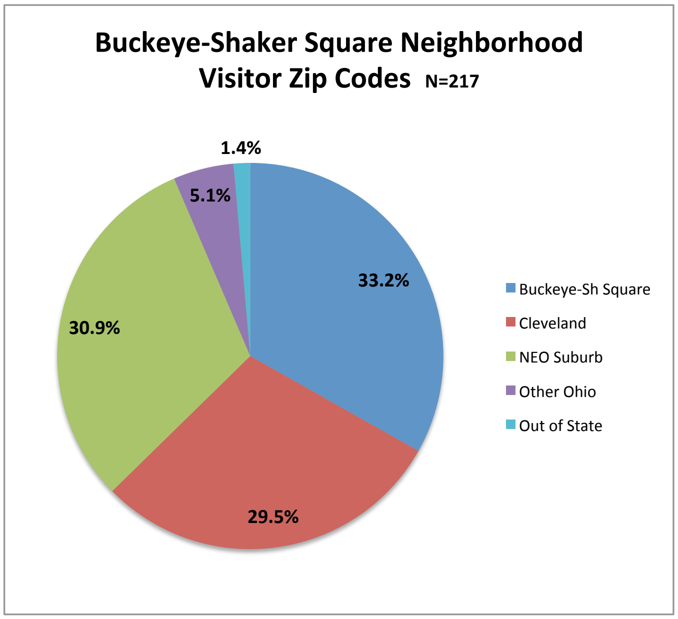


UNION-MILES

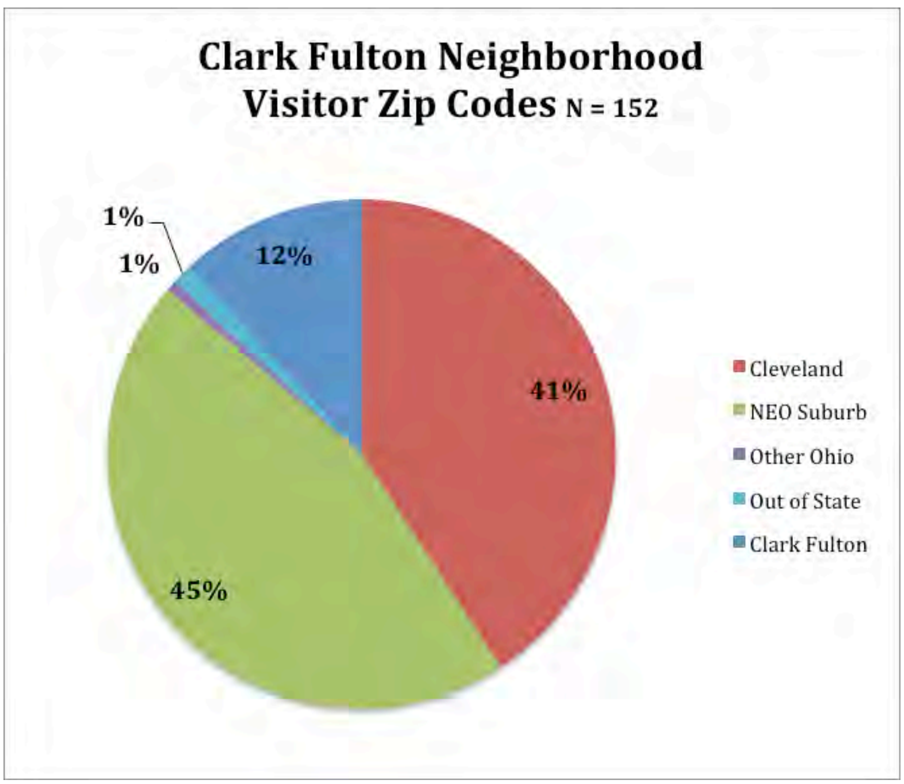


WESTOWN-WEST BLVD

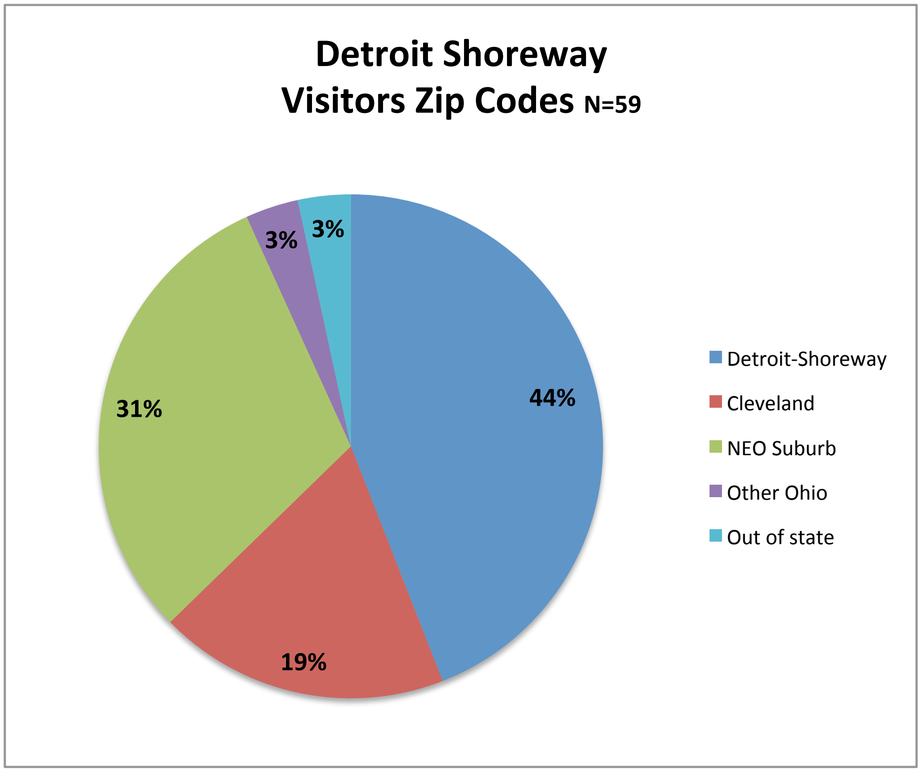
7. Visitors Survey Zip Code Analysis



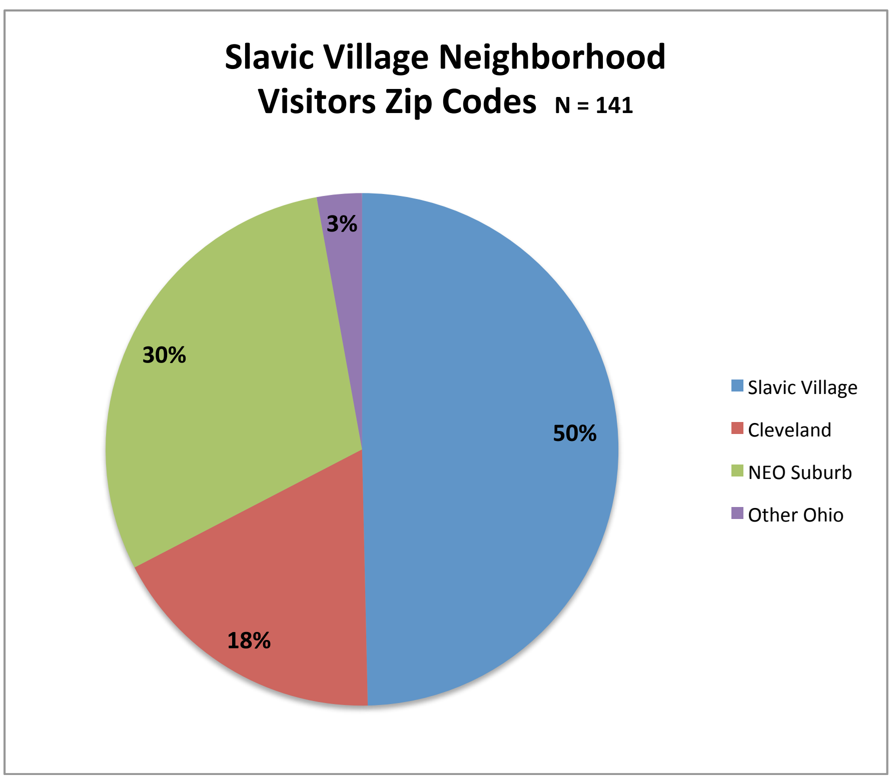
Source: CSU CCPD collected at neighborhood events Summer 2015



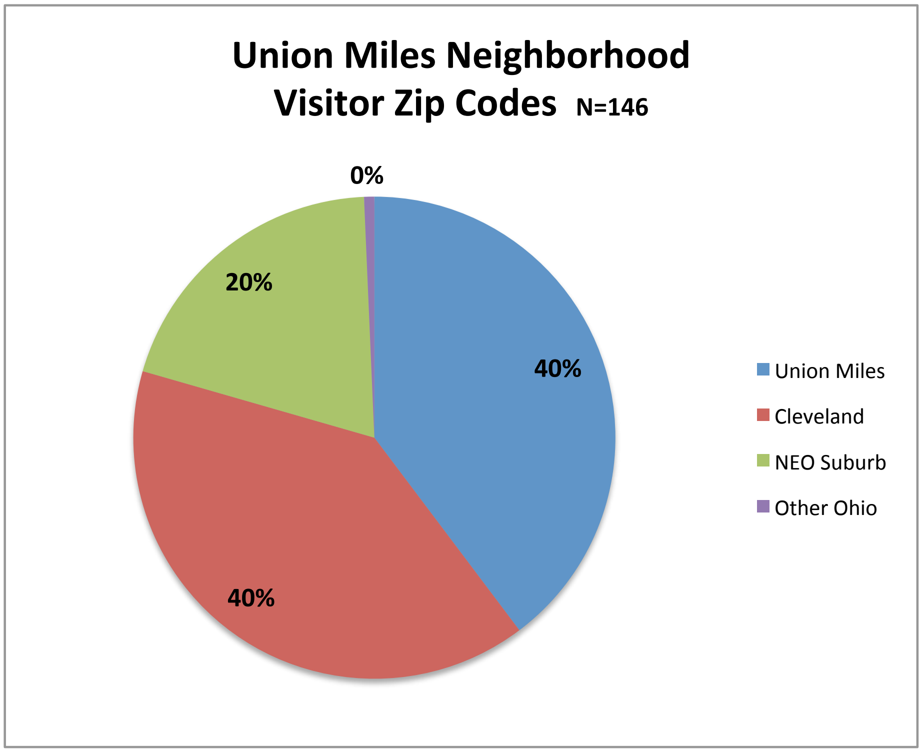
Source: CSU CCPD collected at neighborhood events Summer 2015



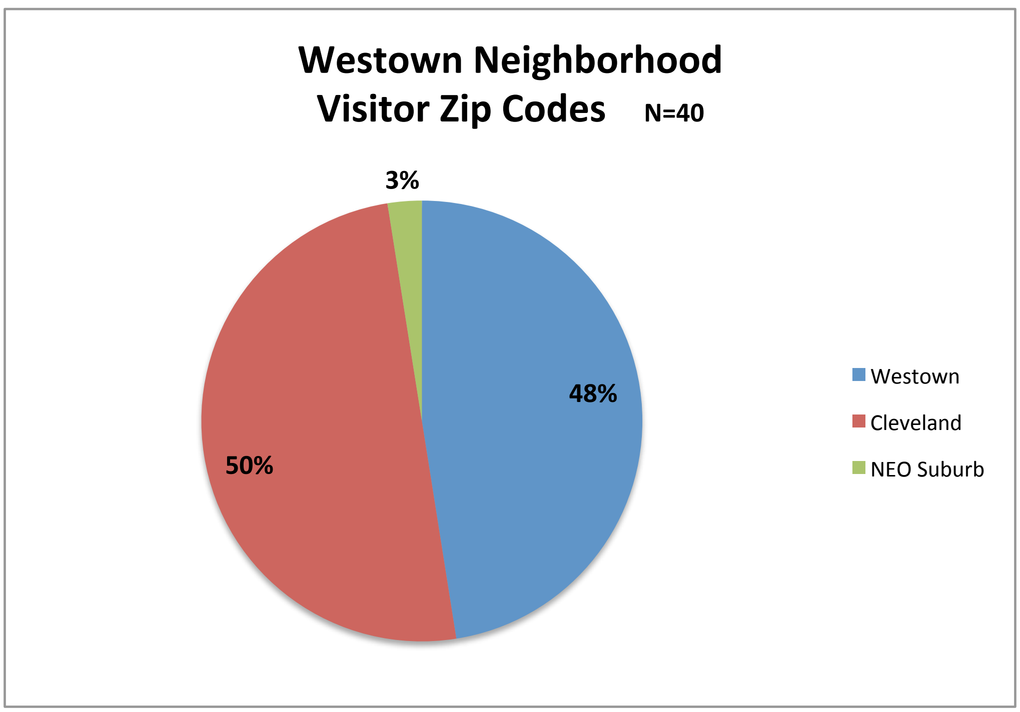
Source: CSU CCPD collected at neighborhood events Summer 2015



Source: CSU CCPD collected at neighborhood events Summer 2015



Source: CSU CCPD collected at neighborhood events Summer 2015



Source: CSU CCPD collected at neighborhood events Summer 2015

Neighborhood Visitors Survey Findings

- A very high rate of validity was observed among surveys collected, with 98% reporting viable zip codes, 93% providing a viable front page, including the capture matrix, and 91% providing viable 2 pages. This result likely reflects careful pre-testing of survey questions, as well as an effective personal interaction of survey administrators with respondents, and attention to respondent comfort at events (providing clipboards, chairs and a shade shelter, entertaining children while caregivers participated, and keeping questions short and direct).
- Detroit Shoreway and Westown had relatively low numbers of surveys, at 56 and 39 respectively, due to limited opportunities for large numbers of people to gather. The other neighborhoods each had at least 130 surveys collected over two to three events, with Larchmere the highest at 212.
- Across all neighborhoods, respondents were about 2/3 female and 1/3 male, perhaps reflecting feminine interest in the shopping topic. Respondent ages were balanced at 41% 35-54, 24% 18-34, and 34% 55 and over. 10% were over 65. Neighborhood, Cleveland and suburban residents were similarly represented overall.
- Respondent education level was higher than the overall education level of Cuyahoga County residents over age 25. Proportions of respondents with a college education who were neighborhood or Cleveland residents fell somewhere between Cuyahoga County residents as a whole (%) and Suburban residents (36%).
- Most respondents were employed, at 54% full-time, 9% part-time and 9% self-employed. 13% were retired, and only 4% were unemployed and looking.
- Respondents overall, who were attendees at neighborhood events, were variable in their place of residence in relation to the location of the event attended. Except for Clark-Fulton events (St. Rocco festival and La Placita at 12%), neighborhood residents represented from 33% to 50% of all respondents. Cleveland residents overall ranged from 53% (Clark-Fulton) to 98% (Westown). Suburban attendees ranged from 20 to 45%, with one outlier, Westown at 3% for a small N of 40 zip codes collected.
- Respondent income was highly variable, across neighborhood-suburban-Cleveland divisions, as well as between neighborhoods. As might be expected, 31% of suburban resident respondents earned over $100,000, compared to 12% of neighborhood and Cleveland residents. A full 57% of neighborhood respondents earned less than $50,000, compared to 24% of suburban residents. Slavic Village neighborhood resident respondents reflected the highest income levels of neighborhood resident respondents, at 31% over $100,000, compared to 28% Detroit-Shoreway, 18% Buckeye-Shaker Square, 12% Clark-Fulton, and 0 for Westown and Clark Fulton. Of interest, Slavic Village residents also reflected the highest level of lower-income resident respondents, at 64% less than $50,000. Westown, Union-Miles and Clark-Fulton were close, with 63%, 59% and 53% respectively; 44% of Buckeye-Shaker Square respondents earned less than $50,000. For comparison, 18% of Cuyahoga County households overall earned more than $100,000, and 55% earned less than $50,000.

- Neighborhood residents in Cleveland neighborhoods do a lot of shopping in their neighborhoods. 44% of all neighborhood resident respondents shop for groceries in their neighborhood, with Westown, Slavic Village and Union-Miles topping the 40% level at 78% 49% and 41% respectively. Neighborhood shopping levels are similarly high for health/beauty, coffee/bakery, restaurants/pizza, and auto supplies. For more durable goods and specialty goods such as clothing, jewelry, home furnishings, and books/music, neighborhood resident capture rates fall in the 10 to 35% range. Hardware/garden falls somewhere in between. When shopping outside their neighborhoods, residents seem to use an equal allocation of other Cleveland locations and suburban locations. The Clark Fulton neighborhood relies more heavily on Steelyard Commons than do other neighborhoods (including, surprisingly, Slavic Village).
- Suburban resident capture rates in Cleveland neighborhoods are highest for restaurants and pizza (10% to 30%, 16% overall). Overall their shopping is predominantly in suburban stores and online. There are some “hot spots” of increased suburban shopping (10% up to 18%) for grocery (Union-Miles), jewelry/gifts (Detroit-Shoreway and Buckeye-Shaker Square), books/music (Detroit-Shoreway and Buckeye-Shaker Square), coffee/bakery (all neighborhoods) and cards/office supplies (Detroit-Shoreway).

8. Visitors Survey Instrument

CSU NEIGHBORHOOD RETAIL MARKET STUDY - VISITOR SURVEY

The Cleveland State University Center for Community Planning and Development is conducting a study of neighborhood retail shopping areas. The purpose of the study is to identify ways to strengthen local neighborhood shopping and dining experiences.

This survey will help us to understand how people use neighborhood main streets. We would appreciate your input! Your participation in this survey is voluntary, and you may choose not to answer any questions. No identifying information is requested. You should be over 18 to participate. The survey should take about five minutes to complete.

☐ **I am aged 18 or over.** (check box if true)

1. **What is your reason for visiting the ******** neighborhood today?** (please circle all that apply)
Special event / shopping / restaurant / visiting friends-family/ recreation / I am a resident / other________________

2. **How often do you shop or dine in the ******** neighborhood?** (circle)
More than once a week / every 1 to 2 weeks/ once a month / a few times a year / first visit today

3. **How much ($) do you expect to spend in the ******** neighborhood today?**

For shopping _________For dining/restaurants ___________Other (explain)________________________

4. **Please tell us where you do most of your shopping for the following:** (check all that apply)

	********	**Steelyard Commons**	**Other shopping area in the City of Cleveland**	**Suburban shopping area**	**Online**	**Do not buy**
Groceries						
Fresh Produce						
Health/Body Care Items						
Clothing/shoes						
Jewelry/gifts						
Hardware/Garden						
Books/Music						
Coffee shop/bakery						
Restaurants/pizza						
Crafts/Hobbies/Toys						
Cards/office supplies						
Electronics						
Home furnishings						
Auto supplies						

5. **What zip code do you live in?________________**

6. **What are the best times of day/week for you to do your shopping?** (circle)
Morning / Lunch Break / Afternoon / Right after work / Evening / Late night
Weekday / or Weekend **(turn over)**

7. What will you spend money on in the ****** neighborhood today?** (check)

- ☐ Groceries
- ☐ Fresh Produce
- ☐ Health/Body Care Supplies
- ☐ Clothing/shoes
- ☐ Jewelry/gifts
- ☐ Hardware/Garden
- ☐ Books/music
- ☐ Coffee shops/bakery
- ☐ Restaurants/pizza/takout
- ☐ Hobbies/Toys
- ☐ Cards/office supplies
- ☐ Electronics
- ☐ Home/cleaning supplies
- ☐ Auto supplies
- ☐ Other_______________________
- ☐ Will not spend money today_

8. How did you get here today? (circle all that apply)
Car – alone / Car – with others / Public transit / Bicycle / Walk / Other

9. What are the THREE most important things to improve the shopping/dining in the ****** Neighborhood?**

- ☐ More choices / Different Variety
- ☐ Better quality products
- ☐ Better parking and access
- ☐ Better RTA service
- ☐ Other (please add any other comments)
- ☐ Safety / Lighting
- ☐ Local Advertising
- ☐ Cleaner and better looking area
- ☐ Better bike access

General information. These questions help us know that a broad range of people are taking our survey. None of your responses will be reported individually or tied to you individually.

10. What is your age? (circle) 18-34 / 35-54 / 55-64 / 65-74 / 75 or over

11. I am: (circle) Male / Female / Other

12. What is your highest completed education level? (circle)
Less than high school / HS graduate or equivalent / Some college, no degree /
Assoc or 2 year degree / Bachelor's 4 year degree / Graduate-professional degree

13. What best describes your employment status? (circle)
Employed part-time / Employed full-time / Self-employed / Unemployed and looking for work /
Homemaker / Student / Retired / Unable to work

14. How many people are in your household?
Total ____________
Children under 18____________
Elders 65 and over ____________

15. What is your estimated household income per year? (circle)
Under $25,000 / $25-50,000 / $50-75,000 / $75-100,000 / $100-150,000 / over $150,000

THANK YOU FOR YOUR PARTICIPATION! Your information will help to support stronger neighborhoods in Cleveland.

APPENDIX D: MERCHANTS' SURVEY AND INTERVIEWS

Merchants survey findings

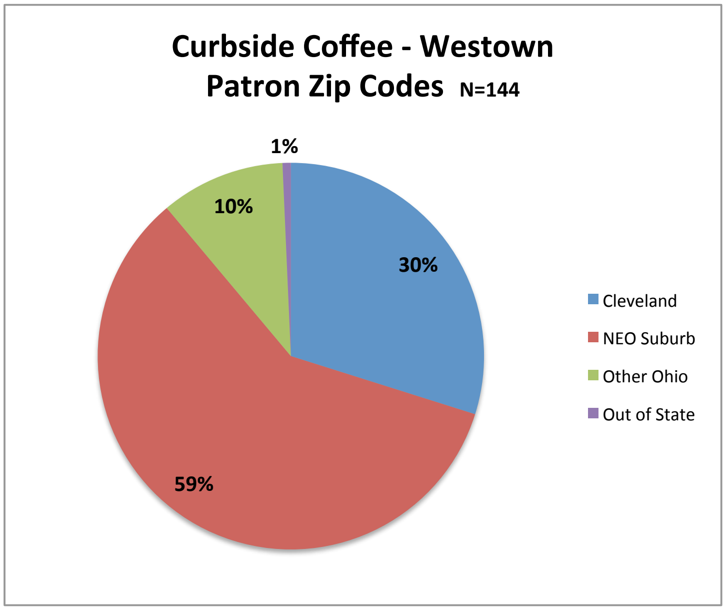
- 23 total respondents, 6 from Buckeye-Shaker Square, 11 from Westown, 4 from Slavic Village (Fleet Ave), 1 each from Clark Fulton and Union-Miles. Due to difficulty contacting and receiving responses from merchants, the total number is smaller than was originally intended.
- Types of businesses represented: grocery, crafts/jewelry/gifts, full service restaurants, auto parts, bar/tavern, books/music, art gallery, clothing/shoes, beauty/barber, auto repair, professional services, florist
- One national business ownership, the rest local ownership of business
- 11 lease their space, (48%) and 12 own their building (52%).
- 16 knew their sales area square footage, 4 did not, 3 did not respond. Of those reported, range 750 to 10,000 square feet; average 3500 square feet.
- About a third had been in business at this location less than 5 years; a third more than 20 years; and the remainder in-between.
- One respondent was a manager, the rest were business owners.
- Seven (30%) felt their business was thriving and growing; 12 (52%) felt it was good to fair. Only three said it was "just barely making it" or "terrible".
- Number of customers per day varied greatly by type of store and location. One local restaurant reported higher customer traffic in good weather. A bookstore reported that the holiday season drew the highest crowds. A gifts/jewelry store in a neighborhood with several large festivals reported that base weekend traffic in winter doubled during the summer, and multiplied again by six at festivals. The range for all respondents was 10 to 100 per day. For restaurants, 600 to 800 customers per week was typical. Barber/beauty reported highest traffic on Saturdays.
- Walk-in vs repeat customers also varied greatly by type of store. Repeat business ranged from 20% (bicycles) to around 50% (professional services, auto parts, electronics, grocery) to upwards of 80% (florists, grocery, tshirts, bar, clothing, coffee shop, auto repair). Restaurants fell in the 75 to 80% range.
- Customers who are neighborhood residents ranged from 10% (some full service restaurants, bar/tavern, electronics, beauty salons) to 100% (grocery and florist). Falling in the middle were books (20%), other full service restaurants (50-60%), auto parts and auto repair (50-70%). This information, if confirmed in additional interviews, tempers the capture rates identified in the visitors' survey, and may be more accurate in the long run.
- Only three of the respondents used online sales; several mentioned online marketing however. Five did not take credit cards, and four did not answer the credit card question. 12 noted that they had a web site (about half), and four did not answer the question.
- Busiest times were dominated by afternoons, with the exception of florists, auto repair and professional services (mornings), and bar/tavern (evenings). Full service restaurants varied by morning, lunchtime and evening depending on the store.
- Ten respondents said their customers did not have adequate parking (43%), and the others felt parking was adequate.

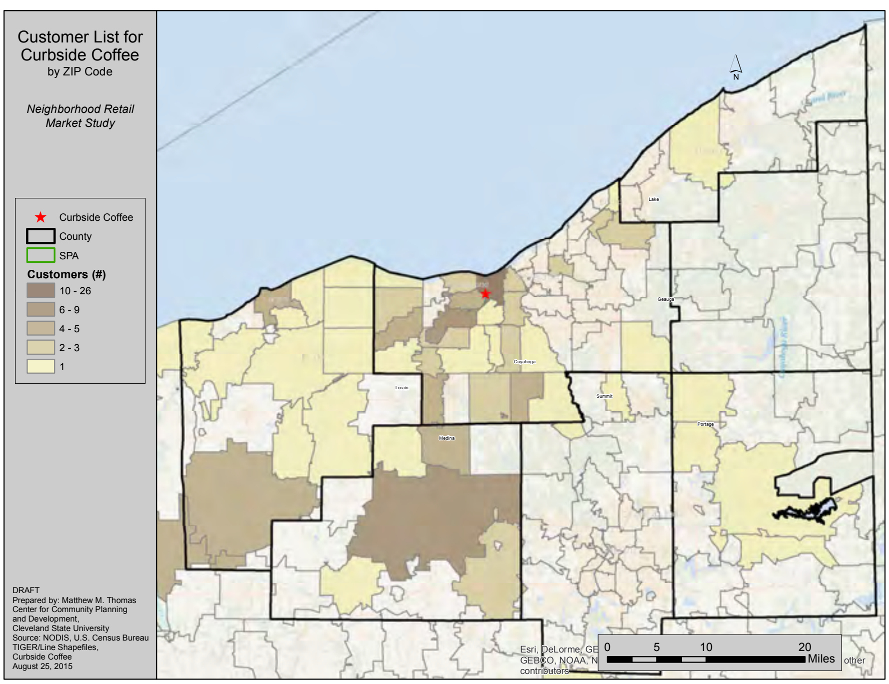
- The majority (15, or 65%) felt their space was adequate to meet their needs. Desired space improvements included expand square footage, expand kitchen space, invest in more equipment, improve old heating and electrical systems, improve exterior appearance, and expand parking.
- Four felt they had no competitors; the rest listed a range of competitors from the neighborhood and beyond their neighborhood. One noted online competitors.
- Complementary businesses listed included neighborhood anchors, neighborhood major employers, restaurants, other shops similar to theirs (provide critical mass) and local shopping centers.
- Location advantages listed included adequate population and buying power, high traffic areas (auto and pedestrian), corner location, near employment, churches, historic use that is well-known, and low overhead (rent and/or building paid for).
- Location disadvantages included lack of storefront critical mass, low traffic, deterioration of property values and incomes in the neighborhood, crime, and lack of communication among businesses.
- When asked what they would do to improve the business environment, eight of the respondents (35%) mentioned improving policing, security and lighting. Other suggestions included increasing critical mass of stores and providing longer hours, attracting a wider range of customers including younger patrons, cleaning up and improving neighborhood appearance and working together with other merchants.
- Ideas for additional retail in their neighborhood included coffee shop/bakery, bike shop, streetside restaurants, entertainment and night attractions, desserts, health conscious store, menswear, clothing, handbags, professional offices, butcher, more businesses catering to young people and families, more big-name anchors. The wide range of suggestions points to a desire for diversity of goods at the neighborhood level.
- Thoughts about "what they would like to see less of" include closed storefronts, hairdressers, convenience stores, car lots, alcoholic beverage stores, convenience stores, dollar stores, and crime.
- We were able to obtain employment information from some of the businesses. Full time employment levels are typically low for small businesses, but could be a factor in the neighborhood economy if a critical number of businesses is involved. This sample is too small to draw any conclusions, but it would be worthwhile to do further analysis in future surveys.

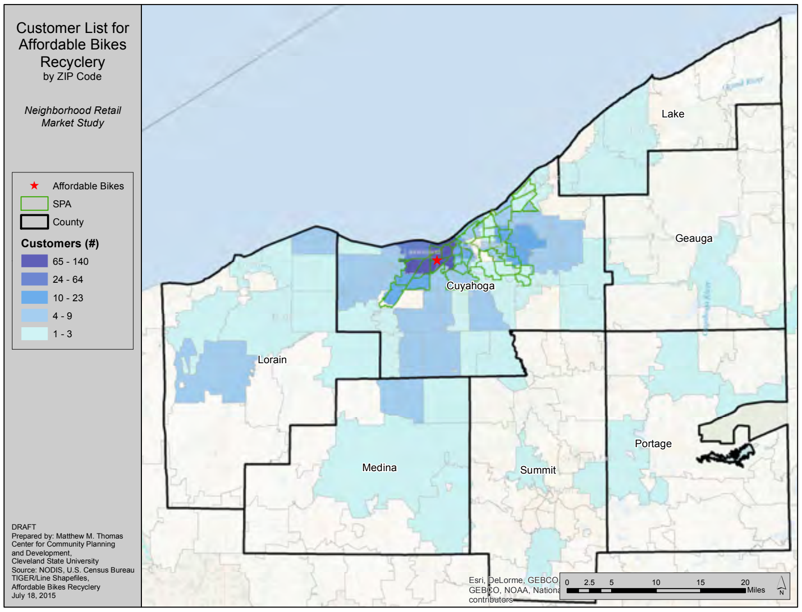
Store Employment

Retail category	Square footage	FT Employees	PT Employees	Comments
crafts/jewelry/gifts, clothing, art	1200	1	3+	seasonal
books, music, toys, or games	9000	1	8	
restaurant-full service	4500	15	40	students
personal and health services	750	2	0	
personal and health services	2400	3	2	+ 1 intern
restaurant-full service	1600	4	8	
bar	1800	2	3	
restaurant-full service	3000	2	1	
restaurant-full service	N/A	7	2	
grocery/produce	7000	7	6	
T shirts	N/A	0	1	
auto parts	N/A	5	4	
florist	10000	10	3	

Customer information
Customer zip code information shared by two businesses in Westown.






Customer List for Affordable Bikes Recyclery
by ZIP Code
Neighborhood Retail Market Study
Affordable Bikes
SPA
County
Customers (#)
65 - 140
24 - 64
10 - 23
4 - 9
1 - 3
Lake
Geauga
Cuyahoga
Lorain
Portage
Medina
Summit
DRAFT
Prepared by: Matthew M. Thomas
Center for Community Planning
and Development,
Cleveland State University
Source: NODIS, U.S. Census Bureau
TIGER/Line Shapefiles,
Affordable Bikes Recyclery
July 18, 2015
Esri, DeLorme, GEBCO,
GEBCO, NOAA, Nationa
contributors
0
2.5
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10
15
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Miles
N

MERCHANTS SURVEY INSTRUMENT

CSU NEIGHBORHOOD RETAIL MARKET STUDY - MERCHANTS SURVEY

The Cleveland State University Center for Community Planning and Development is working with Detroit-Shoreway Community Development to conduct a study of neighborhood retail shopping environments. The purpose of the study is to identify ways to strengthen local neighborhood shopping and dining experiences. The study includes both a visitors' survey and a merchants' survey.

The merchants' survey will help us understand how your local business environment works, and how it can be supported and enhanced. We hope you will take a few minutes to complete this survey. We very much appreciate your help! Your participation in this survey is voluntary, and you may choose not to answer any questions. No identifying information is requested. You should be over 18 to participate.

Please put the survey in the enclosed envelope and seal it, and we will pick it up later today. This survey should take about 15 minutes to fill out. For more information, contact:

Kirby Date, AICP, Community Planner
Levin College of Urban Affairs, Cleveland State University
Tel. 216-687-5477
k.date@csuohio.edu

☐ I am over 18 (check box if true)

1. **What is your business type or product(s)?** (check all that apply)

- ☐ Grocery
- ☐ Hardware/lawn/garden
- ☐ Crafts/Jewelry/gifts
- ☐ Banking
- ☐ Restaurant – Full service
- ☐ Restaurant – "fast food" or fast service
- ☐ Bar or liquor establishment
- ☐ Auto, truck and trailer sales, service and repair
- ☐ Antiques/collectibles/repurposed merchandise
- ☐ Books, music, toys or games
- ☐ Home furnishings and accessories
- ☐ Crafts/sewing/supplies
- ☐ Art gallery/studio
- ☐ Clothing and shoes
- ☐ Office supplies/ stationery/party goods
- ☐ Personal and Health Services (barber/salon/spa/wellness)
- ☐ Professional services (insurance/financial/real estate)
- ☐ Health/social services (medical/dental/counseling)
- ☐ Equipment sales and repair
- ☐ Electronics sales and repair
- ☐ General Merchandise, variety, discount supplies, pharmacy
- ☐ Sports and leisure equipment
- ☐ Gas Station or Convenience
- ☐ Printing and Photography
- ☐ Other________________________ (please specify)

2. **Would you say the ownership of your store is:** local / NE Ohio/national? (circle)

3. **How large is your store or building area of business?** ____________ Square Feet (fill in)

4. **How long has your business been located here?** (circle)
less than 5 years / 5-10 years / 10-20 years / over 20 years

1

5. **What is your position with the business?** (circle) Owner / manager / other ________________

6. **How many employees do you have?** ______ full time __________ part time _________ seasonal

7. **How many in-store customers do you get on a "normal" weekend day?**____________
   "Normal" weekday?_______________

8. **About what percentage of your customers are:**
   - "walk-in"?_____________%
   - "repeat business"? _______________%

9. **Where do your in-store customers come from?**
   - Neighborhood ________________%
   - Regional _____________%

10. **About what percentage of your sales are on-line?** ______________%

11. **Would you say business for your store right now is:** (circle)
    Thriving, growing / Good to fair / Just barely making it / Terrible

12. **Do you have a succession plan for your business?** Yes / No (please circle)

13. **What days and times are the busiest for you?** (please circle)

    Weekdays: morning / lunchtime / afternoon / evening
    Saturdays: morning / lunchtime / afternoon / evening
    Sundays: morning / lunchtime / afternoon / evening

14. **Do your customers have adequate parking?** (circle) Yes / No
    Comments:

15. **Do you or your business own or lease your store area/building?** (circle) Own / lease

16. **Is your store area/building adequate for your business?** (circle) Yes / no

17. **If your store area/building is not adequate, what could be improved?**

18. **Who are your main competitors?**
    - Business Name_____________________ __________________ Location____________________________
    - Business Name____ Location____________________________
    - Business Name____Location____________________________

19. **What three businesses in this neighborhood complement your business the most?**
    - Business name_______________________
    - Business name_______________________

- Business name______________________

20. What are the advantages of your business location (neighborhood, street)?

21. What are the disadvantages to this location (if any)?

22. What needs to be improved to make business stronger in this neighborhood?

23. What other retail businesses or places would you like to see in this neighborhood?

24. What would you like to see less of in this neighborhood?

25. Are you a member of a merchants' association in this neighborhood? Yes/No (circle)

26. What other comments/ideas do you have about the future of this neighborhood's retail business district?

Note Neighborhood of merchant____

THANK YOU FOR YOUR PARTICIPATION! Your information will help support stronger neighborhoods in Cleveland.

APPENDIX E: PRIMARY MARKET AREA DEMOGRAPHICS

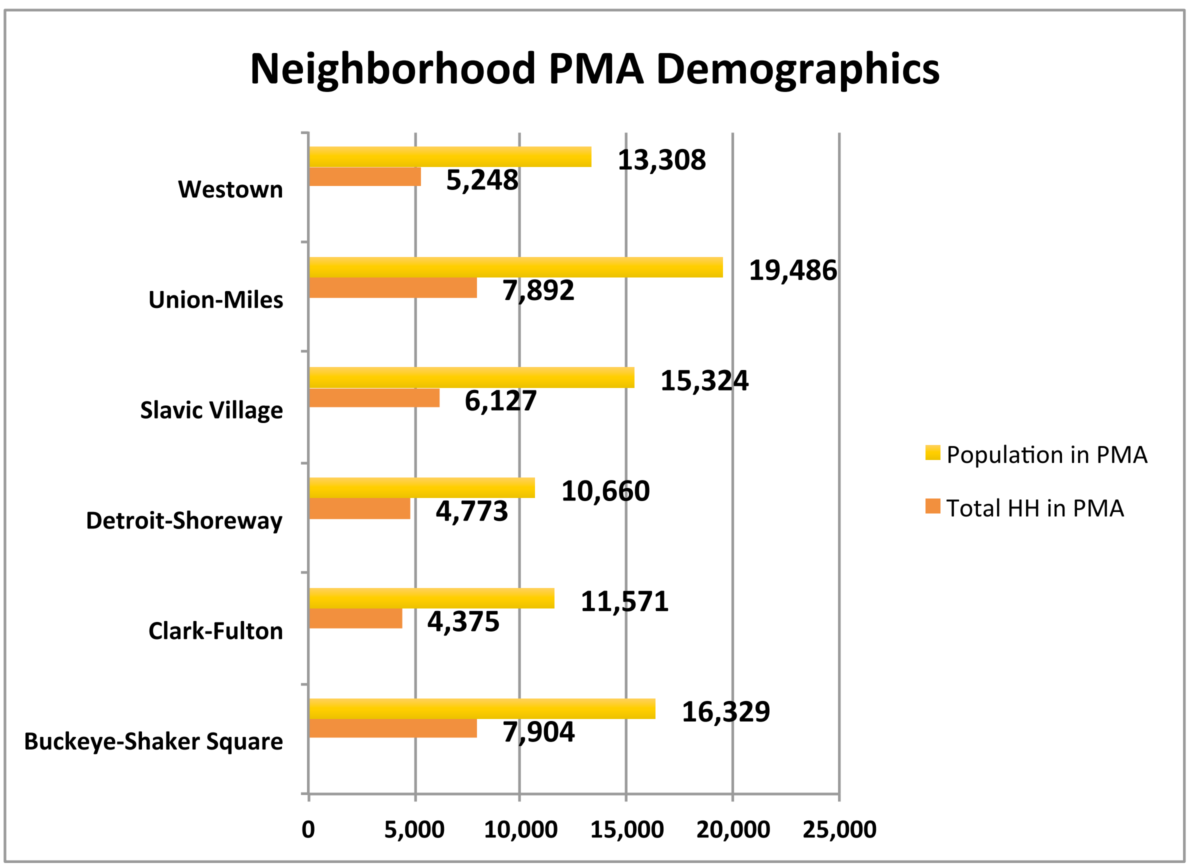
1. Method

Demographics within the Primary Market Area (PMA) boundary for each neighborhood were collected from the census, using GIS analysis to "clip" the data within the boundaries. This analysis assumes that population, household and other characteristics are uniform across each census tract. In addition to the US Census data, demographic information was collected from CoStar.com, a commercial real estate data site.

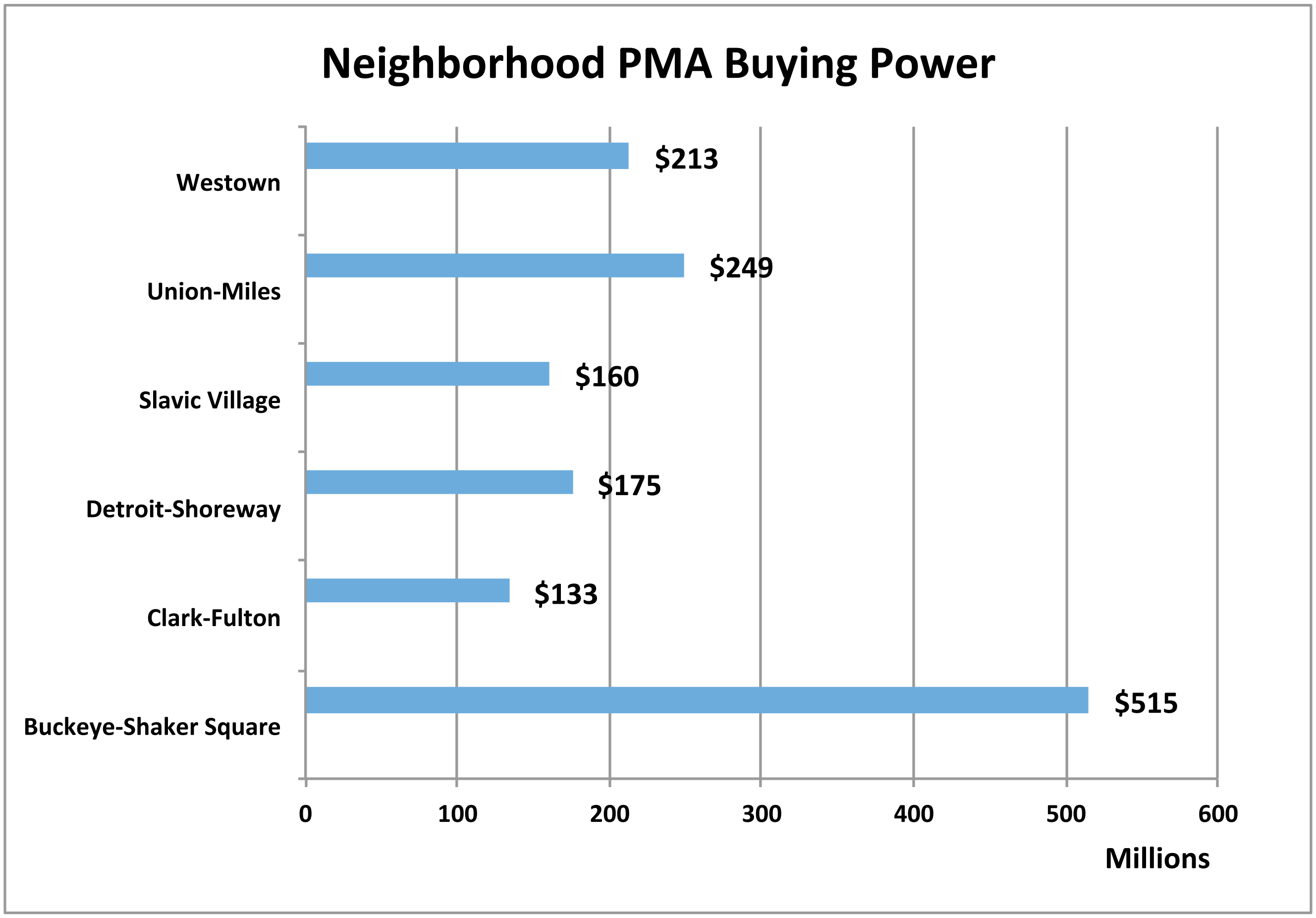
2. PMA Basic Demographics and Income

Primary Market Area (PMA)	Total HH in PMA	Mean HH Income	Total Buying Power	Population in PMA	Percent Pop Under 18	Percent Pop 65 and over
Buckeye-Shaker Square	7,904	$ 65,134	$ 514,792,543	16,329	20%	16%
Clark-Fulton	4,375	$ 30,486	$ 133,362,225	11,571	25%	9%
Detroit-Shoreway	4,773	$ 36,672	$ 175,028,715	10,660	22%	10%
Slavic Village	6,127	$ 26,156	$ 160,255,513	15,324	30%	9%
Union-Miles	7,892	$ 31,495	$ 248,567,299	19,486	25%	17%
Westown	5248	$ 40,516	$ 212,615,922	13,308	25%	9%

Source: CSU CCPD, U.S. Census 2014 5-year estimates



Source: CSU CCPD, US Census 2014 5-year estimates

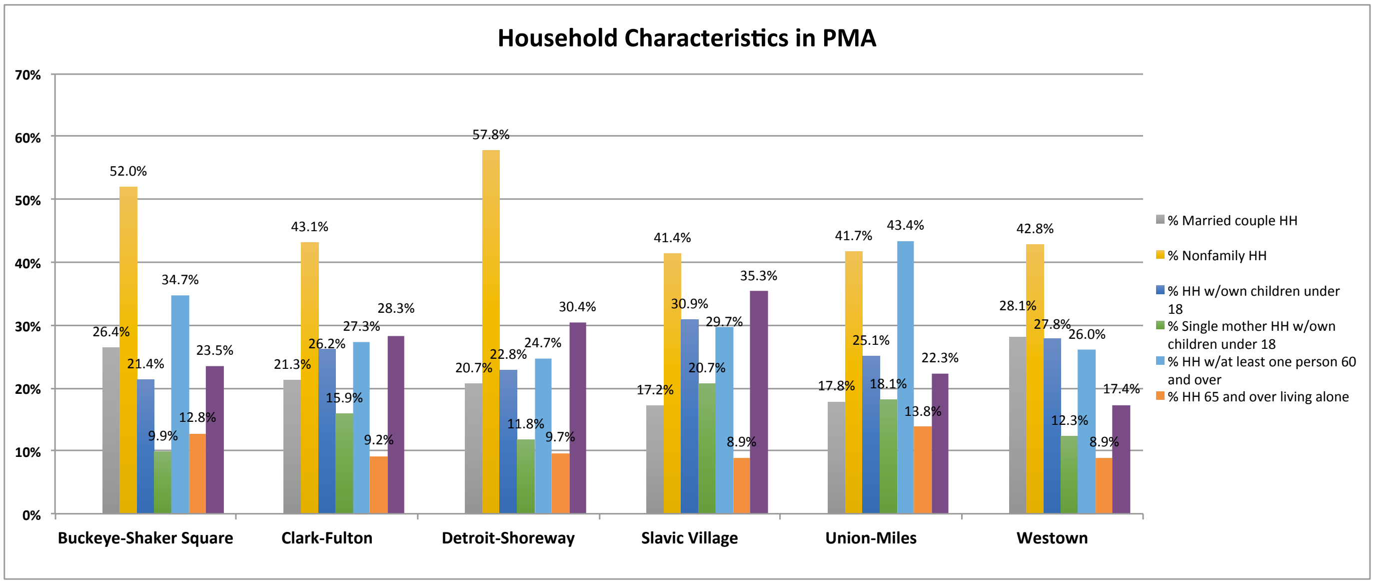


Source: CSU CCPD, US Census 2014 5-year Estimates

3. PMA Households and Families

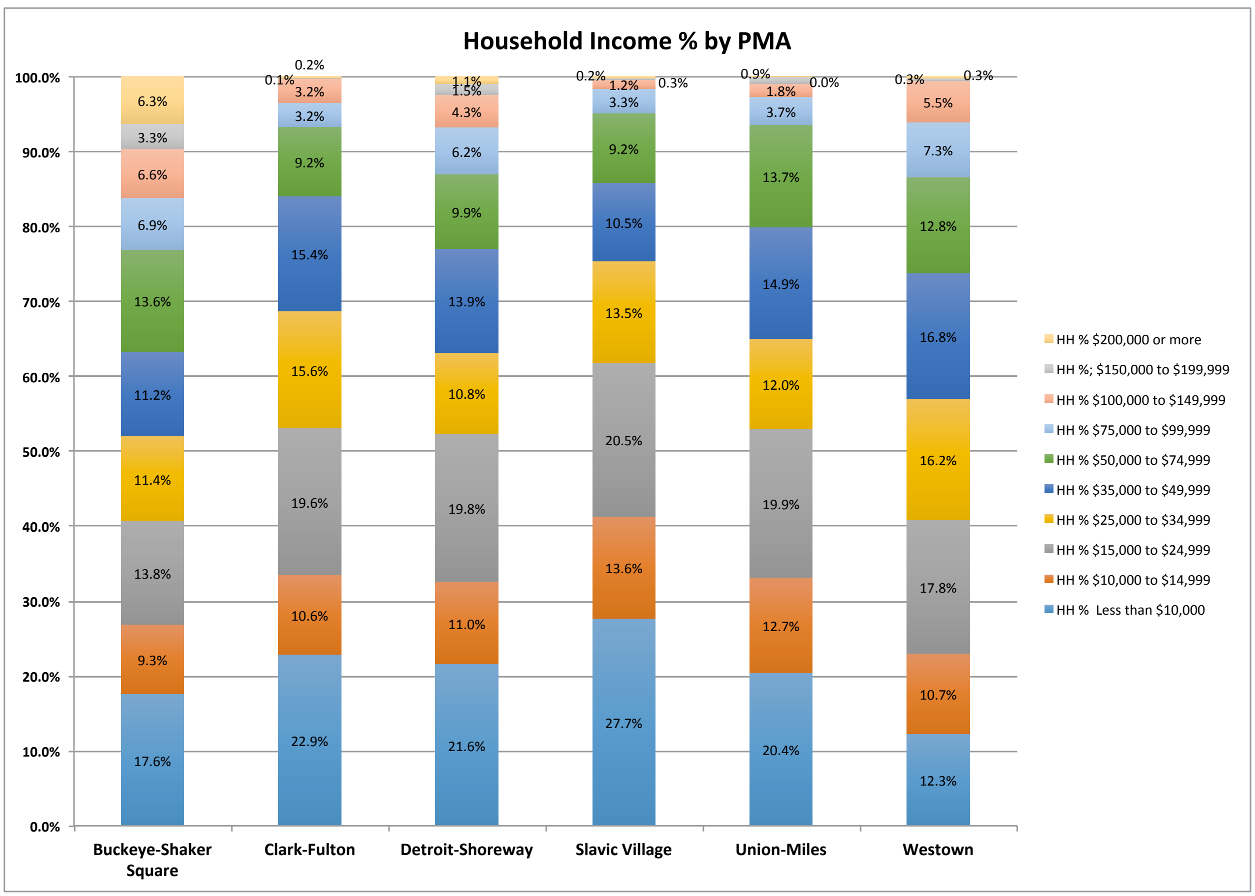
Primary Market Area (PMA)	No. HH in PMA	% Married couple HH	% Nonfamily HH	% HH w/own children under 18	% Single mother HH w/own children under 18	% HH w/at least one person 60 and over	HH 65 and over living alone	% HH w/no vehicle
Buckeye-Shaker Square	7904	26.4%	52.0%	21.4%	9.9%	34.7%	12.8%	23.5%
Clark-Fulton	4375	21.3%	43.1%	26.2%	15.9%	27.3%	9.2%	28.3%
Detroit-Shoreway	4773	20.7%	57.8%	22.8%	11.8%	24.7%	9.7%	30.4%
Slavic Village	6127	17.2%	41.4%	30.9%	20.7%	29.7%	8.9%	35.3%
Union-Miles	7892	17.8%	41.7%	25.1%	18.1%	43.4%	13.8%	22.3%
Westown	5248	28.1%	42.8%	27.8%	12.3%	26.0%	8.9%	17.4%

Source: CSU CCPD, U.S. Census 2014 5-year estimates



Source: CSU CCPD, US Census 2014 5-year estimates

4. PMA Household Income by Percentage



Source: CCPD and US Census, American Communities Survey 2014 5-year estimates

PMA Household Income – No of HH

PMA	Total HH in PMA	No. HH less than $10,000	No. HH $10,000 to $14,999	No. HH $15,000 to $24,999	No. HH $25,000 to $34,999	No. HH $35,000 to $49,999	No. HH $50,000 to $74,999	No. HH $75,000 to $99,999	No. HH $100,000 to $149,999	No. HH $150,000 to $199,999	No. HH $200,000 or more
Buckeye-Shaker Square	7,904	1,390	735	1,088	898	889	1,078	545	518	264	501
Clark-Fulton	4,375	1,001	462	857	684	672	404	140	141	4	9
Detroit-Shoreway	4,773	1,030	523	944	518	661	474	297	207	70	50
Slavic Village	6,127	1,697	833	1,256	829	643	566	199	76	12	16
Union-Miles	7,892	1,611	1,002	1,568	948	1,174	1,079	296	139	73	2
Westown	5,248	643	563	935	849	881	671	385	289	17	16

Source: CSU CCPD, U.S. Census 2014 5-year estimates

5. Neighborhood Employment

The following information was identified in Reference USA's database as located within the named neighborhoods.

	Buckeye-Shaker Square	Clark-Fulton	Detroit-Shoreway	Slavic Village	Union-Miles	Westown
No. employees in neighborhood area	2487	1958	6858	9355	2083	4531
No. firms in neighborhood area	361	197	515	407	171	487
Average firm size	7	10	13	23	12	9
Largest employers over 100	Dave's Markets	Lincoln West High School	Community Oriented Policing?	ISG Cleveland Inc	Cleveland Police Dept	Mid-West Direct
	Benjamin Rose Institute on Aging	Dealers Supply North Inc	St Augustine Health Ministries	UTC Aerospace Systems	John Adams High School	Npa Coatings Inc
	Kindred Hospital	Jones Home	Catholic Charities	Third Federal Savings & Loan	Garland Co Inc	Giant Eagle
			Hkm Direct Market Comms Inc	Presrite Corp	GMX Inc	Metal Fabricating Corp
			WSEM-Cdc Head Start	Republic Services		Prime Instruments Inc
			Apex Paper Box Co	Ferro Corp		Dorn Color Inc
			Max S Hayes High School	Metrohealth Center For Cmnty		
			Alcon Industries Inc	Salvation Army		
			Joseph M Gallagher School			
			Martin Sheet Metal Inc			
			Ripcho Studio			

Source: Reference USA, April 2016

Note: Reference USA identifies Slavic Village as "South Broadway", and Westown as "Cudell" and "West Boulevard".

6. Neighborhood Radius Demographic Data

Demographic, household and employment data were collected from CoStar.com, based on 1, 3 and 5 mile radii from the address associated with the neighborhood "mean center". For the full CoStar reports, see the separate pdf resource.

CoStar Demographic Data – Radius from neighborhood center location

	Buckeye-Shaker Square	Clark-Fulton	Detroit-Shoreway	Slavic Village	Union-Miles	Westown
Annual consumer spending						
Within 1 mile	$ 191,861	$ 112,744	$ 118,382	$ 92,625	$ 130,127	$ 177,680
Within 3 miles	$ 1,335,763	$ 944,767	$ 962,515	$ 713,797	$ 1,145,029	$ 1,435,976
Business within 1 mile						
No. businesses	721	1,524	691	627	309	629
No. employees	5,176	20,728	7,700	8,941	2,328	7,259
Population						
Within 1 mile	21,922	17,445	16,308	14,789	19,399	24,452
Within 3 miles	159,954	127,929	119,926	106,889	142,149	163,872
Households						
Within 1 mile	10,385	6,569	6,737	6,388	7,711	9,391
Within 3 miles	68,092	52,168	52,162	46,508	59,590	70,871
Median home value						
Within 1 mile	$ 89,489	$ 60,077	$ 71,177	$ 52,238	$ 54,536	$ 56,356
Within 3 miles	$ 87,929	$ 64,546	$ 70,316	$ 58,127	$ 67,074	$ 79,739
Mean household income						
Within 1 mile	$ 51,855	$ 34,756	$ 40,802	$ 28,549	$ 36,588	$ 39,408
Within 3 miles	$ 53,153	$ 40,731	$ 45,053	$ 33,597	$ 48,406	$ 48,635
Median household income						
Within 1 mile	$ 27,971	$ 23,379	$ 24,276	$ 18,685	$ 28,078	$ 30,006
Within 3 miles	$ 30,159	$ 25,896	$ 28,936	$ 22,018	$ 32,966	$ 34,917

Source: CoStar data 2015

Demographic Findings

- The Neighborhood primary market areas have a range of populations and household levels, ranging from 10,000 to 20,000 people, and from 4300 to 8000 households. Union-Miles has the largest population and corresponding number of households, and Detroit-Shoreway has the least population and number of households.
- The range of households including a person age 65 and over runs from 9% (Clark Fulton, Westown and Slavic Village, with Detroit Shoreway at 10%) to 17% (Union Miles). The Cuyahoga County level is 15.5%, indicating that most of the neighborhoods have higher numbers of younger people than is typical. Union Miles reflects a more typical number for the County as a whole.
- Neighborhood PMA mean household income is in the range of $26,000 on the low end (Slavic Village PMA) to a high of $65,000 (Buckeye-Shaker Square PMA). Buckeye-Shaker Square's higher mean household income, combined with a relatively high number of households, results in substantially higher buying power within the PMA.
- Neighborhood annual buying power (resident household income) ranges from $113 million (Clark-Fulton) to $515 million (Buckeye-Shaker Square). Combined with population and household numbers, these numbers are substantially lower than what would be seen in a typical suburban shopping center trade area.
- While Detroit-Shoreway has the lowest PMA population and a relatively low comparative resident buying power, it is home to many businesses with over 100

employees, which add 7000 people to the daytime population. Slavic Village has the highest daytime population add with 9300 additional employees within the neighborhood. (note that employment figures are unverified Reference USA sourced, and also apply to the overall neighborhood rather than specific PMA boundaries used in demographic analysis).

- Income among the neighborhoods is highly variable. As might be expected, Buckeye-Shaker Square has over 10 times the number of households earning over $200,000 per year as does the next-highest neighborhood (Detroit-Shoreway). Buckeye-Shaker Square has over 5 times the number of households earning over $100,000 per year as does Detroit-Shoreway (also the next-highest neighborhood). On the low end is Clark-Fulton with an estimated 13 residents earning over $150,000. However, Buckeye-Shaker Square has 40% of households earning less than $25,000, ranging up to 60% in Slavic Village.
- Nonfamily households lead the household types in all neighborhoods, ranging from 42% in Slavic Village and Union-Miles, to 52% in Buckeye-Shaker Square and 57% in Detroit-Shoreway. Nonfamily households are defined as people living alone, or unrelated people living together. Seniors living alone are a primary base of this household type, along with younger adult singles and young adults living with unrelated roommates. The nonfamily household level for Cuyahoga County is 42%.
- The number of families with children in Cleveland neighborhoods is typical. Households with their own children under 18 range from 21% (Buckeye Shaker Square) to 31% (Slavic Village). This is in line with the Cuyahoga County level of 25%.
- Cleveland neighborhood households without access to a car are substantially higher than the County level (which is 13.7%). Westown has the lowest number of households without access to a car at 17%, and Slavic Village is the highest at 35%. This difference has significant implications for shopping and capture rates within the neighborhood.
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APPENDIX F: NEIGHBORHOOD RETAIL SUPPLY: INVENTORY AND METHOD

A thorough and complete inventory of retail businesses within each PMA is an important input into supply and demand analysis. Development and real estate interests often rely on commercial databases for information on surrounding competing retail spaces, their occupants, and important information such as leasable square footage, rents, annual sales, business categories, and building age and condition. At the urban neighborhood level, commercial databases are largely incomplete because so many of the retail spaces are owner-occupied, are too small to be of interest to real estate investment, or the building owner has declined to share complete information. At the same time, many potential neighborhood storefront spaces are vacant, or have been structurally or temporarily repurposed for residential, church, office, commercial business, storage, daycare, or other uses, and do not show up in commercial databases.

For this study, Reference USA data was used as the most complete starting point available to identify businesses within each PMA. This data was clipped for retail and consumer service categories, and to coincide with PMA boundaries. The data was then aligned address-by-address with CoStar property and lease data, and with building condition and parcel number data available from the Thriving Communities Institute (2015 survey) via NEOCANDO. Then each street and address was checked on Google streetview (images 2011 through 2015, as available) and the category/use of the first floor was judged. Vacant and repurposed spaces were added. Finally, first floor square footage was measured on Google Earth.

A field check was completed in the summer of 2016; changes were not substantial enough to warrant revision of major points of the study. It is best to see the inventory as a "snapshot" of business activity as of the fall of 2015.

The inventory began with about 5000 address points, and resulted in a total of 1600.

Assessment of vacancy was very difficult and involved a substantial amount of judgment. Should a dilapidated building which appears to be used for storage be considered viable vacant retail space? What about storefront on the main street which has been bricked over and a front door and window installed for residential use? Many of the neighborhoods once supported populations four to five times the size of the current population at their peak in the 1940's – a time when people still frequently walked to the corner for daily goods. As a result, smaller storefront clusters are present on side streets throughout the neighborhoods - many of which have now been completely repurposed for residential, church or other uses.

For the purposes of this study, buildings which were dilapidated to the point of a Thriving Communities Institute grade D were not counted, assuming removal was inevitable. Retail storefront spaces on side streets which had been successfully repurposed to other uses were not counted. Storefronts on main streets which had been repurposed to non-retail uses were counted as “other use”. Only storefronts which retained enough character to be potential storefront again in the future were counted as vacant retail space. Finally, first floor community uses for arts, health care, nonprofit association, education, and other uses were noted as “other use”. Daycare was considered a consumer service for the purposes of this study.

Health care was not counted as a retail use due to the large and somewhat distorted market that is driven by external factors other than population and proximity. The exception are dental and optometry offices, which were seen as still being a household-driven use in neighborhoods. Local professional retail services, such as insurance, financial, bank, accounting/tax, and legal services, were counted as retail uses.   Due to limited time for field counts of upper-floor occupancy, consumer services and offices were only counted if they occupied first-floor retail space.

Traffic information was also collected for each neighborhood, to inform the understanding of neighborhood characteristics and business environment. The most complete traffic data was found in the CoStar database.

2. Neighborhood comparison: square footage, specialty niches, vacancy

	Overall Square Footage					
Specialty Category	**Buckeye-Shaker Square**	**Clark Fulton**	**Detroit Shoreway**	**Slavic Village**	**Union Miles**	**Westown**
PMA Population	16,329	11,571	10,660	15,324	19,486	13,308
Total PMA Households	7,904	4,375	4,773	6,127	7,892	5,248
PMA Buying Power	$ 514,792,543	$ 133,362,225	$ 175,028,715	$ 160,255,513	$ 248,567,299	$ 212,615,922
Appliances		9,300	1,800	6,700	2,300	4,600
Art/Antiques/Framing	18,700		28,100	6,000		3,000
Auto parts		56,400	6,600	12,845	17,000	9,500
Auto repair/svc	18,700	52,100	23,550	34,599	36,535	47,875
Bank	6,300	10,300	5,900	19,300	6,000	16,261
Bar/tavern		16,200	13,800	14,400	6,700	6,300
Beer/Wine/Liquor Stores		2,200		5,000	17,000	
Books/music	10,000	6,500			900	
Bowling Alley		7,000				
Bridal/formal		2,600				
Camera/photography		1,500				
Cinemas	20,000					
Clothing/shoes	4,300	4,600	4,450	15,750	1,500	21,414
Coffee/Tea/Bakery	1,000	1,800	3,000			1,800
Computer services		700				
Computer/Electronics/phone	2,000	12,800	4,850	12,720	10,950	21,810
Convenience	9,000	42,050	38,400	41,700	42,550	27,587
Daycare	7,400	3,500	25,400	38,310	34,800	18,100
Delivery/Shipping/Printing				3,600		
Dentists office	1,000	1,200		1,500		12,550
Design/communication	8,000		1,200			
Drugstores	5,000	26,500	14,000	12,000	12,400	20,840
Financial svc/insurance	1,850	3,200	1,650	11,846	1,000	7,050
Fitness/Yoga/Dance/martial arts	1,100	4,450	1,500		4,000	3,500
Floor Coverings	2,865					
Florists	1,500			3,400		
Funeral svcs	2,700	4,300	7,600	26,700	4,500	14,000
Garden/plants						4,700
Gas station/convenience	4,100	14,800	3,800	14,150	14,900	11,950
General merchandise	900	21,500	9,000	50,731	35,100	82,616
Gifts/novelties	1,500	1,300		2,500		
Grocery	18,500	25,000	13,300	62,303	20,700	26,550
Hardware/home/garden		3,600	1,600	1,200	2,200	2,400
Health/beauty		2,400	2,500	9,760	7,900	5,250
Home furnishings		3,000	6,500	3,100	2,600	17,980
Icecream/Candy/Popcorn	1,000	100	2,000	600	900	3,900
Jewelry		900	1,000			3,000
Laundry/Dry cleaning	5,300	6,300	6,000	8,600	12,500	4,600
Legal services	500	1,300		4,500		1,200
Locksmiths	1,200	1,300				2,800
Luggage/leather goods			3,700			1,200
Musical Instruments		1,000				1,600
Office supply/stationery			4,400			
Optometrist		1,200		2,300		4,350
Other arts/ent/ed/rec	700					
Other retail		1,000			1,400	900
Other retail - auto sales		5,300	32,400	5,700	6,500	4,850
Other services	2,500	1,000	6,000			
Other svc - bus management						2,000
Other svc - health	1,000	8,500	1,500	52,088		53,370
Other svc - hookah						900
Other svcs - rental				4,700		9,833
Other svc - upholstery						3,301
Paint/Wallpaper	2,200					
Pet store/svcs	1,200	3,750		1,400		2,300

	Overall Square Footage					
Specialty Category	Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
Photography svcs	900	1,000	10,000		900	
Photography Store	1,100					
Printing svcs		3,000	1,300			
Real Estate Svcs	6,000		300	1,430		
Restaurant - full svc	43,350	14,300	23,580	7,950	13,900	34,801
Restaurant - limited svc	1,000	21,100	9,450	22,720	900	15,800
Restaurant - limited svc local	1,900	1,200	7,400	5,325	4,650	6,656
Restaurant - Pizza	3,000	600	7,420	7,234		4,800
Salon/Barber/Unisex	29,616	16,600	7,750	7,550	25,600	29,600
Sewing/Crafts/Customer Studio	1,200					
Social Hall/event/party ctr		13,000	19,100	61,800	4,000	15,500
Specialty foods		4,700	2,000	4,500		21,400
Specialty foods - butcher			8,200	1,500	1,200	
Spiritual store/svcs		800				700
Sport/outdoors/bikes		2,400	2,000	1,250		1,600
Tailor/alterations	900	1,200			500	
Tattoo		2,100	1,200			1,500
Tax/accounting	1,000	5,000	3,800	15,100	1,200	7,908
Tobacco/Cigar		500				2,000
Toys/Games/Dolls	2,000	1,000				
Travel Svcs				4,100		1,700
Used/resale/vintage	17,450	8,500	3,700	2,600	2,500	3,600
TOTAL RETAIL AND SERVICES	**271,431**	**469,450**	**382,700**	**633,061**	**358,185**	**635,302**
Community - arts	16,100		500			
Community - development		4,000		3,000		4,600
Community - education	25,100			28,500		
Community - health		1,000	3,100			
Community - library				3,000		8,700
Community - local goods market	500					
Community - museum				1,500		
Community - performance			17,800			
Community - school				4,880		
Community - social svcs	22,800	2,000	2,200	3,000		
Other use	2,400					
Other use - business	1,000	1,700	11,100	8,730	900	9,500
Other use - church	4,400	6,150	900	11,400	49,970	11,800
Other use - office		2,200	3,100	3,500	1,200	8,500
Other Use - Residential	1,500	2,050		3,650	6,350	15,150
Other use - unclear	10,960		1,200	5,750	9,060	31,550
TOTAL OTHER USES	**84,760**	**19,100**	**39,900**	**76,910**	**67,480**	**89,800**
Measured vacancy*	63,900	32,900	60,300	182,648	107,089	124,601
Grand Total	420,091	521,450	482,900	892,619	532,754	849,703
Measured vacancy rate*	15.2%	6.3%	12.5%	20.5%	20.1%	14.7%

Source: CSU CCPD, Reference USA, Google maps and Google earth.

Notes:

Square footage measured includes first floor storefront only.

*Measured vacancy includes a subjective judgment of what appeared to be potential storefront in the future.

More work is needed to define measured vacancy.

In particular, vacant spaces not on main streets that were in poor condition, or had clearly been repurposed for other uses, were not counted as v
were not counted as vacant.

3. Retail categories with over 5% square footage in at least one neighborhood

See the Oversized Appendices for the full table showing all categories and square footages.

Specialty Category	All Neighborhoods	Buckeye-Shaker Square	Clark Fulton	Detroit Shoreway	Slavic Village	Union Miles	Westown
Art/Antiques/Framing	2.14%	6.91%	0.00%	8.06%	1.04%	0.00%	0.52%
Auto parts	3.92%	0.00%	12.01%	1.89%	2.23%	4.83%	1.65%
Auto repair/svc	8.17%	6.91%	11.10%	6.75%	6.01%	10.39%	8.30%
Cinemas	0.77%	7.40%	0.00%	0.00%	0.00%	0.00%	0.00%
Convenience	7.71%	3.33%	8.96%	11.01%	7.25%	12.10%	4.78%
Daycare	4.88%	2.74%	0.75%	7.28%	6.66%	9.90%	3.14%
Drugstores	3.47%	1.85%	5.64%	4.01%	2.09%	3.53%	3.61%
General merchandise	7.65%	0.33%	4.58%	2.58%	8.82%	9.98%	14.32%
Grocery	6.37%	6.84%	5.33%	3.81%	10.83%	5.89%	4.60%
Restaurant - full svc	5.54%	16.03%	3.05%	6.76%	1.38%	3.95%	6.03%
Salon/Barber/Unisex	3.83%	10.95%	3.54%	2.22%	1.31%	7.28%	5.13%
Social Hall/event/party ctr	4.02%	0.00%	2.77%	5.48%	10.74%	1.14%	2.69%
Used/resale/vintage	1.47%	6.45%	1.81%	1.06%	0.45%	0.71%	0.62%
TOTAL RETAIL AND SERVICES	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: CSU CCPD from inventory

Notes:

Quantities over 5% noted in orange

Quantities 1%-5% noted in green

4. Average business size and average annual sales

Average business size and typical annual sales are additional factors that go into a niche demand analysis, as they help to transform dollar-based buying power into indicated retail square footage and number of businesses supported. An inventory of typical business sizes was taken from the inventory of businesses across all neighborhoods. Average annual sales were provided for many of the businesses inventoried by the Reference USA database, although the origin of these estimates, and method for calculating them, is not known. These numbers were weighed against the ULI's 2008 Dollars and Cents of Shopping Center data (inflated to 2015), along with other data collected at large from various sources as noted, and a judgment made about appropriate sales and business size information for Cleveland urban businesses.

Selected Annual Sales per Square Foot and Size in Square Feet

Category	Average size in square feet	Annual retail sales per square foot	Source Year	2015 Value	Source
Auto parts	5686	$788	2015	$788	CSU study/RefUSA
Auto parts	5000	$212	2013	$215	ULI Dollars and Cents of Shopping Ctrs
Bar/Tavern	1594	$203	2015	$203	CSU study/RefUSA
Bars/taverns		$ 100-250	2015	$ 100-250	NCIAA Nightclub Industry Assn of America
Bars/Taverns	2000	$388	2013	$395	ULI Dollars and Cents of Shopping Ctrs
Clothing/Shoes	2023	$263	2015	$263	CSU study/RefUSA
Clothing/shoes	10000	$250	2013	$255	ULI Dollars and Cents of Shopping Ctrs
Convenience	2075	$1,101	2015	$1,101	CSU study/RefUSA
General Merchandise		$1,115	2014	$1,116	Forbes.com
General Merchandise		$681	2009	$752	Wikinvest
General merchandise	9992	$73	2015	$73	CSU study/RefUSA
General merchandise	10000	$264	2013	$268	ULI Dollars and Cents of Shopping Ctrs
Grocery		$517	2008	$569	Wikinvest
Grocery		$549	2008	$604	Wikinvest
Grocery		$623	2015	$623	Food Marketing Institute
Grocery		$491	2012	$507	Statista.com
Independent Retail		$ 350-500+	2009	$385-550	LiveWorkLearnPlay LWLP.com
Independent Retail		$ 300+	2009	$330+	LiveWorkLearnPlay LWLP.com
Independent Retail		$ 350+	2009	$385+	LiveWorkLearnPlay LWLP.com
Jewelry	1225	$461	2015	$461	CSU study/RefUSA
Jewelry Stores	1000	$329	2013	$335	ULI Dollars and Cents of Shopping Ctrs
Pet Care	2000	$90	2013	$92	ULI Dollars and Cents of Shopping Ctrs
Pet stores/care	1730	$211	2015	$211	CSU study/RefUSA
Restaurant - full service	1865	$202	2015	$202	CSU study/RefUSA
Restaurants - full svc		$ 250-350	2014	$250-350	Baker Tilly Virchow Krause, LLP
Restaurants - full svc	3000	$325	2013	$331	ULI Dollars and Cents of Shopping Ctrs
Restaurant - limited service	1611	$401	2015	$401	CSU study/RefUSA
Restaurants - limited svc		$ 300-400	2014	$300-400	Baker Tilly Virchow Krause, LLP
Restaurants - limited svc	2500	$375	2013	$381	ULI Dollars and Cents of Shopping Ctrs
Salon/barber/unisex	1061	$146	2015	$146	CSU study/RefUSA
Salon/barber/Unisex	1500	$234	2013	$238	ULI Dollars and Cents of Shopping Ctrs
Used merchandise	2257	$331	2015	$331	CSU study/RefUSA
Used merchandise	3000	$37	2013	$38	ULI Dollars and Cents of Shopping Ctrs

3. Neighborhood Traffic levels

Street	Cross Street	Cross-Strt Dist from Core, Miles	Count Year	Avg Daily Vol	Mi from Core	Neighborhood
Shaker Blvd	E 130th St	0.01 W	2010	13,422	0.06	Buckeye-SS
Shaker Blvd	E 130th St	0.01 W	2014	15,969	0.06	Buckeye-SS
Shaker Blvd	Shaker Sq	0.02 W	2014	21,080	0.12	Buckeye-SS
N Moreland Blvd	Cormere Ave	0.03 S	2014	18,217	0.18	Buckeye-SS
Shaker Blvd	Shaker Sq	0.14 W	2014	8,166	0.23	Buckeye-SS
S Moreland Blvd	S Woodland Rd	0.03 S	2014	16,605	0.23	Buckeye-SS
Shaker Blvd	E 126th St	0.06 E	2014	18,604	0.27	Buckeye-SS
Van Aken Blvd	S Woodland Rd	0.13 SE	2014	16,589	0.31	Buckeye-SS
Van Aken Blvd	Drexmore Rd	0.14 NW	2014	16,648	0.32	Buckeye-SS
Kemper Rd	Fairhill Rd	0.16 N	2014	16,562	0.39	Buckeye-SS
W 25th St	W 19th Pl	0.00 N	2011	21,491	0.15	Clark-Fulton
W 25th St	Clark Ave	0.04 S	2014	19,166	0.15	Clark-Fulton
W 25th St	Buckeye Ct	0.02 S	2014	13,822	0.17	Clark-Fulton
Clark Ave	W 25th St	0.03 W	2014	8,299	0.19	Clark-Fulton
I-90	W 30th St	0.13 E	2011	124,796	0.25	Clark-Fulton
I- 90	W 30th St	0.13 E	2014	112,240	0.25	Clark-Fulton
I-90	W 25th St	0.08 W	2011	104,159	0.35	Clark-Fulton
I- 90	W 25th St	0.08 W	2014	47,332	0.35	Clark-Fulton
W 25th St	Barber Ave	0.01 S	2014	19,503	0.39	Clark-Fulton
Clark Ave	W 14th St	0.02 E	2014	7,261	0.57	Clark-Fulton
Detroit Ave	W 67th St	0.02 W	2014	10,031	0.03	Detroit-Shoreway
Detroit Ave	W 65th St	0.02 SW	2014	10,131	0.03	Detroit-Shoreway
W 65th St	Clinton Ave	0.03 S	2014	4,992	0.06	Detroit-Shoreway
W 65th St	Alger Ct	0.04 S	2014	3,622	0.06	Detroit-Shoreway
Detroit Ave	W 57th St	0.01 SW	2014	5,775	0.28	Detroit-Shoreway
W 65th St	Madison Ave	0.02 S	2014	8,872	0.46	Detroit-Shoreway
Madison Ave	W 65th St	0.02 E	2014	5,363	0.49	Detroit-Shoreway
Madison Ave	W 65th St	0.02 W	2014	1,291	0.49	Detroit-Shoreway
W 65th St	Guthrie Ave	0.01 S	2014	9,421	0.51	Detroit-Shoreway
Cleve Mem Shrwy	W 29th St	0.57 E	2011	38,382	0.54	Detroit-Shoreway
Union Ave	E 65th St	0.03 E	2014	12,832	0.13	Slavic Village
Broadway Ave	Morton Ave	0.01 NW	2014	16,835	0.22	Slavic Village
Broadway Ave	Forman Ave	0.04 SE	2014	10,062	0.26	Slavic Village
E 71st St	Chambers Ave	0.01 N	2014	7,068	0.4	Slavic Village
E 55th St	Blanche Ave	0.07 S	2014	3,868	0.47	Slavic Village
Union Ave	E 76th St	0.02 W	2014	13,428	0.48	Slavic Village
E 78th St	Coral Ave	0.03 N	2014	7,690	0.54	Slavic Village
E 55th St	Fleet Ave	0.04 S	2014	3,660	0.56	Slavic Village
Fleet Ave	E 57th St	0.02 E	2011	14,718	0.57	Slavic Village
Fleet Ave	E 57th St	0.02 E	2014	13,428	0.57	Slavic Village
E 131st St	Marston Ave	0.04 N	2014	11,841	0.05	Union-Miles
Miles Ave	E 130th St	0.03 W	2014	17,250	0.14	Union-Miles
Harvard Ave E	E 131st St	0.09 W	2014	13,981	0.15	Union-Miles
E 131st St	Crennell Ave	0.02 N	2014	13,971	0.19	Union-Miles
Harvard Ave E	E 127th St	0.08 W	2014	10,261	0.2	Union-Miles
Miles Ave	E 116th St	0.05 W	2014	9,567	0.62	Union-Miles
Miles Ave	E 112th St	0.02 E	2014	8,840	0.89	Union-Miles
I-90	W 106th St	0.08 E	2011	111,159	0.21	Westown
I- 90	W 106th St	0.08 E	2014	98,889	0.21	Westown
Lorain Ave	W 115th St	0.02 SW	2014	16,654	0.24	Westown
Triskett Rd	W 117th St	0.02 W	2014	4,589	0.33	Westown
W 117th St	Triskett Rd	0.04 S	2014	21,717	0.34	Westown
W 117th St	Geraldine Ave	0.03 S	2014	22,951	0.35	Westown
I-90	W 106th St	0.11 W	2011	113,687	0.35	Westown
I- 90	W 106th St	0.11 W	2014	109,806	0.35	Westown
Lorain Ave	W 117th St	0.01 SW	2014	16,323	0.37	Westown
Lorain Ave	West Blvd	0.02 NE	2014	18,326	0.37	Westown

Source: MPSI = 24 hour average daily traffic, provided by MPSI Inc.

Inventory Findings

- Total occupied retail space in the neighborhood PMAs varied widely among the neighborhoods, from 270,000 square feet (Buckeye-Shaker Square) to 635,000 square feet (Westown).
- Measured vacancy ranged from 6% (Clark Fulton) to 20% (Union-Miles and Slavic Village). Detroit-Shoreway (12%), Buckeye-Shaker Square (15%) and Westown (14%) were somewhere in-between.
- Clark Fulton had the highest proportion of mainstream chain businesses such as McDonalds, Rally's Auto Parts, Rite Aids and Walgreens. Slavic Village also had a relatively high level of mainstream chain businesses.
- The retail/service category with the highest square footage as a percentage of total retail, across all neighborhoods, was auto repair and service. Convenience, general merchandise, grocery, and full service restaurants also ranked high overall with over 5% of total retail/service square footage. In individual neighborhoods, full service restaurants ranged up to 16% of the total (Buckeye Shaker Square) with this category also high in Detroit-Shoreway. Of interest, salons/barber shops were also high in Buckeye-Shaker Square; and in Union Miles and Westown. Convenience was high in Detroit-Shoreway. These categories reflect a very distinctive urban neighborhood pattern. Auto repair, beauty salons/barbers, grocery and convenience are essentially recession-proof businesses that fill daily needs for necessary or prioritized goods and services. Full service restaurants represent special attractions drawing outside customers in, while also serving the generally high demand for food outside the home across all income categories. See the next section for more information.
- Convenience stores in particular drew the author's attention during the inventory process. There seem to be many of them in every neighborhood, block by block, many occupying longtime older storefronts that probably have housed similar corner stores for generations. Their small sizes do not lend them to providing an range of affordable fresh food. And yet, the author is aware that these "bodegas" succeed across urban neighborhoods in larger US cities and many others in the world. In Cleveland neighborhoods, many convenience stores serve specific interests and needs of local ethnic populations. Reference USA's typical sales per square foot, if accurate, reflect a likely modest profit margin that is at least consistent. Innovative programs to introduce fresh produce and other higher-quality goods to local neighborhood convenience stores may be well-placed if sustainable practices can be developed.
- Square footage that was dedicated or had been repurposed to other uses ranged from 19,000 (Clark Fulton) to 90,000 (Westown). "Other uses" (community, nonretail business, church, daycare, residential, and unclear) as a percentage of total retail, vacant, and other use space ranged from 4% (Clark Fulton) to 24% (Buckeye-Shaker Square). Detroit Shoreway (9%), Slavic Village (11%), Westown (12%), and Union Miles (16%) fell in the mid-range.
- While typical business sizes of mainstream retail can be quite large, around 10,000 square feet for a drugstore, 7,000 square feet for an auto supply store, and up to 120,000 or even more for a large general merchandise store, neighborhood retail

stores are typically substantially smaller. Many storefronts range from 500 to 1500 square feet, although businesses often combine two or three storefronts together to achieve larger spaces. This provides an opportunity for smaller businesses to get a foothold with less investment (in space and inventory). It also provides business at a scale that works for walkable main streets, and the intimacy that goes with the personal service that signifies independent business. Main Street business advisors note that inventory control software can now help small businesses maintain the right proportion of inventory within a small space to optimize the investment of space and capital to maximize sales.

- Annual sales data varied widely between Reference USA and ULI information, sometimes by a factor of ten. More information is needed to understand true dollars per square foot sales of independent businesses. A rule of thumb given in the reference table from a business advisor suggests $250-350 per square foot is typical for independent main street businesses. When in doubt, this estimate was used as a baseline for selecting the appropriate figure.
- Average daily traffic volumes on the key non-freeway main streets in each neighborhood were in line with generally understood main street retail attraction levels of 8,000 to 20,000 vehicles per day. All main streets in Buckeye-Shaker Square were above 13,000, with one exception. Clark-Fulton streets were similarly placed above 13,000 with two exceptions. Detroit-Shoreway's streets were the lowest in the group at 3600 to 10,000, with one below at 1,700. The other neighborhoods ranged in between. The highest non-freeway street volumes among the neighborhoods were West 117th Street in Westown at 22,951; West 25th Street in Clark-Fulton at 21,491; and North Moreland Boulevard at Shaker Square at 18,217. Miles Avenue at East 130th Street was also high at 17,250, and Broadway Ave at Morton in Slavic Village at 16,835. These statistics illustrate that in general, traffic volumes are high enough to attract drive-through demand, in addition to neighborhood resident and destination visitor demand. Of interest, Detroit Shoreway's lower numbers do not seem to affect the growing success of local businesses in comparison to the other neighborhoods, perhaps in part because of a large proportion of bicycling and walking patrons in that neighborhood.
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APPENDIX G: PMA DEMAND ANALYSIS

Consumer demand was defined through analysis of capture rates as indicated in the visitors' survey, gravity model competitor analysis leading to definition of each neighborhood's trade area or Primary Market Area (PMA), and census analysis of household expenditures and retail trade to estimate household expenditures on goods and services. The method for each area is further explained below.

1. Capture rates

Existing capture rates were defined in categories corresponding to visitor survey responses about neighborhood resident shopping patterns. Colored items below were asked directly in the survey; black text indicates assumptions assigned by the author.

Capture rate assumptions

Standard Niche Categories	Buckeye-Shaker Square	Clark-Fulton	Detroit-Shoreway	Slavic Village	Union-Miles	Westown
	Percent neighborhood capture					
DINING						
Restaurants - full service	54	39	57	51	29	59
Restaurants - limited service	49	65	65	40	21	31
Bars/Taverns, Catering	50	50	60	45	25	45
RETAIL SHOPPING						
Auto Parts	8	47	7	40	28	39
Books/Music	33	17	23	21	22	7
Clothing/Shoes, Luggage/Leather Goods, Sporting goods	18	10	6	35	24	20
Computer/electronics/phone	10	10	3	23	14	12
Convenience, Gas stations	80	80	80	80	80	80
Grocery, Beer/Wine/Liquor	34	32	25	49	41	78
Hardware/Home/Garden, Other retail	14	12	23	38	27	36
Health/Beauty, Drugstores, General Merchandise	27	40	26	49	28	71
Home Furnishings, Household appliances	17	0	0	23	10	13
Jewelry, Gifts/novelties, Florists, Used merchandise, Musical instruments	22	5	10	28	22	16
Office Supplies/stationery	24	33	12	21	21	38
Specialty foods	54	39	57	51	29	59
Toy/Craft/Hobby	29	13	3	22	17	25
CONSUMER SERVICES						
Auto repair/services, Salon/barber, Misc repair, Electronic repair, Fitness/Health	27	40	26	49	28	71
Laundromat/Dry Cleaning, Pet Svcs, Banks, Optometrists, Dental offices, Locksmiths, Tax, Financial, Tailoring, Shoe repair	34	32	25	49	41	78
Legal Services, Real Estate Svcs, Photography svc, Travel svc, Funeral Svcs, Other svc	18	10	6	35	24	20
Cinemas, Bowling	22	5	10	28	22	16

Source: CSU CCPD, Summer 2015 Visitor Surveys

Note: Items in color were generated by the Visitors Survey capture analysis

2. Gravity model calculations

Gravity model calculations were determined by identifying competitor shopping areas throughout Cleveland and within 2 miles of City boundaries. The mean center of retail activity in each neighborhood was calculated using GIS to identify the "subject center" address. Competitor and neighborhood center shopping areas were measured on Google Earth (first floor only), and then distance to competitors and size in relation to competitors were calculated using the gravity formula. The primary market area boundary so defined was then mapped.

See Appendices for competitor and gravity model maps; see also the Demographics section of this study for maps showing the PMA boundaries.

Subject and Competitor Data Used in Gravity Model Analysis

Store Name	Center of Gravity Address	Estimated Square Feet Total	Reference Locn	Distance from Relevant Core (mi)	Ratio SF Competitor/SF SV	Boundary Distance from Core (mi)
SLAVIC VILLAGE CORE	6711 Broadway Ave	192,151	Aldi			
SV COMPETITORS						
Steelyard Commons	3400 Steelyard Dr	820,002	Walmart	2.49	4.27	0.81
Arbor Park Place Shopping Center	2500 E 40th St	38,779	Dave's	2.24	0.20	1.55
Shaker Square	13130 Shaker Square	185,740	Dave's	3.07	0.97	1.55
Dave's Slavic Village	7422 Harvard Ave	102,072	Dave's	0.97	0.53	0.56
Turneytown Shopping Center	4948 Turney Rd	269,498	Dave's	2.89	1.40	1.32
DETROIT-SHOREWAY CORE	6500 Detroit Ave	167,657	Gordon Square			
DETROIT-SHOREWAY COMPETITORS						
W 117th	3100 W 117th St	394,611	Target	2.26	2.35	0.89
Dave's Ohio City	2700 Carroll Ave	315,906	Dave's	1.28	1.88	0.54
Steelyard Commons	3400 Steelyard Dr	820,002	Walmart	2.60	4.89	0.81
Dave's Mercado	3565 Ridge Rd	180,366	Dave's	1.72	1.08	0.84
UNION-MILES CORE	4127 E 131st	88,073	Miles Supermarket			
UNION-MILES COMPETITORS						
Dave's Slavic Village	7422 Harvard Ave	102,072	Dave's	2.25	1.16	1.08
Broadway Shoppes	6711 Broadway Ave	192,151	Aldi	2.85	2.18	1.15
Turneytown Shopping Center	4948 Turney Rd	269,498	Dave's	1.83	3.06	0.67
Shaker Towne Ctr	16611 Chagrin Blvd	217,542	Heinen's	1.88	2.47	0.73
Lee/Harvard Ctr	16820 Harvard Ave	316,358	Dave's	1.50	3.59	0.52
BUCKEYE-SHAKER SQUARE CORE	13130 Shaker Square	185,740	Dave's			
BUCKEYE-SHAKER SQUARE COMPETITORS						
Shops at Church Square	7965 Euclid Ave	125,210	Family Dollar	2.61	0.67	1.43
Buckeye Plaza	11501 Buckeye Rd	199,395	Giant Eagle	0.70	1.07	0.34
Shaker Towne Ctr	16611 Chagrin Blvd	217,542	Heinen's	1.93	1.17	0.93
Dave's Cedar/Fairmount	12438 Cedar Rd	98,230	Dave's	1.23	0.53	0.71
Cedar/Lee	1940 Lee Rd	104,051	Zagara's	2.08	0.56	1.19
CLARK-FULTON CORE	3024 Clark Ave	232,691	Save-A-Lot			
CLARK-FULTON COMPETITORS						
Dave's Ohio City	2700 Carroll Ave	315,906	Dave's	1.03	1.36	0.48
Steelyard Commons	3400 Steelyard Dr	820,002	Walmart	0.86	3.52	0.30
Dave's Mercado	3565 Ridge Rd	180,366	Dave's	1.98	0.78	1.05
WESTOWN CORE	10950 Lorain Ave	224,464	Save-A-Lot			
WESTOWN COMPETITORS						
W. 117th	3100 W 117th St	394,611	Target	0.47	1.76	0.20
Fairwood	13820 Lorain Ave	233,176	Giant Eagle	1.48	1.04	0.73
Brookpark/Tiedeman	10000 Brookpark Rd	616,165	Walmart	3.17	2.75	1.19
Dave's Mercado	3565 Ridge Rd	180,366	Dave's	1.28	0.80	0.67
Ridge Park Square	7359 Northcliff Ave	516,380	Marc's	2.96	2.30	1.18
Source: SF as measured from Google Maps 2015; CSU CCPD Calculations						

3. Retail demand – household expenditures

To calculate retail demand, a weighted average approach was used to determine percentage of household income spent on dining and retail businesses, based on shopping patterns for each income level. This tailored the results to the actual income levels typical across the six neighborhoods. The resulting proportion of business was then applied to buying power in each primary market area to identify the potential retail sales in the neighborhood. General retail expenditures were calculated at 31.51% of household income, with consumer services amounting to 3.02% (excluding health care), outside dining/drinking requiring an additional 5.36% of household income. A factor for e-commerce, which in 2014 ran at 6.4% of retail trade, was calculated in for various categories of retail expenditures.

Once the overall household expenditure was known for dining/drinking and retail business, Census of Retail Trade information was applied to break down typical household expenditures into retail niche categories.

4. Consumer Services Demand – Household Expenditures

Consumer services are much more difficult to quantify because government reporting of services expenditures is not comprehensive. Instead, IBIS World data on the relative size of various consumer services industries was used as to approximate the relative level of household spending on these services. This is a rough science, since it is impossible to separate business-to-business commerce from household commerce. For legal and financial services, the spending level was reduced by half to account for likely high levels of business-to-business expenditure.

5. Consumer Price Index Inflation Table

Some data available on typical business annual sales and business size (square footage) is historic, predating 2015. The US Bureau of Labor Statistics Consumer Price Index was used to inflate cost information to 2015 when necessary.

Demand Findings

- Household expenditures for basic goods are represented by grocery (food for home consumption). These expenditures vary from around 10% for the highest income household (over $200,000) to 19% for lower income categories. The overall expenditure for all retail goods ranged from 20% to 33.9% for higher and lower income households respectively. The weighted expense, taking the income of all households measured in the six neighborhoods together, was 31.51%, compared to the national average of 28.7%. Due to the 4% difference, the weighted proportion was used to represent consumer spending in the niche analysis for this study.
- Food consumed outside the home now represents 6% of household income spending, as a national average. The sizeable amount, combined with available

separable data, and the important role that dining plays in main street retail activity, motivated the separation of consumer spending in the niche analysis for this study.

- Expenditure on food outside the home does not vary as widely across incomes as does expenditure for retail goods. The range is 4.5% for incomes $20,000 to $29,999, to 6.1% for incomes $70,000-79,000. The weighted average for our Cleveland neighborhood group was 5.36%.
- Of the 31.51% of household income spent on retail goods, the largest proportion is spent on grocery stores (5.61%), gas stations/convenience (5.24%), hardware/home/garden (3.1 percent), and general merchandise (6.51%).
- Of the 3.02% of household income spent on consumer services (excluding health care and education), the largest proportion is spent on legal and financial services. As mentioned in the method discussion, consumer services metrics are much less reliable because the US government does not collect data to parallel the way retail goods spending is tracked.

APPENDIX H: COMPARING SUPPLY AND DEMAND

1. Neighborhood Niche Analysis

Information generated, as noted above, on PMA buying power, household expenditures, capture rates, typical business sizes, typical annual sales, and an inventory of supply in each neighborhood, was entered in a Niche Analysis Table for each neighborhood. The result was a projection of unmet demand (or overmet demand) for each category of retail business and consumer services. Overall neighborhood leakage was also calculated, in both dollars and square footage, for each category. Gap analysis represents the likely current status of retail spending, reflecting the capture rates identified by visitors in the 2015 surveys. Leakage analysis represents the total spending by PMA households for each category; spending in excess of neighborhood capacity is shown as a positive number, which is leakage outside the PMA and represents potential spending that could be captured in the PMA if additional development were to occur to provide the spending opportunity. Finally, a negative leakage number indicates spending that is occurring in the neighborhood in excess of neighborhood household spending capacity, and represents likely sales to consumers coming in from outside the neighborhood – in essence, an "export" – which can be seen as a neighborhood retail strength.

Summary tables follow, with gaps and/or leakages over 500 square feet (the likely minimum size for a single urban neighborhood store) highlighted in blue.

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	18,919	12,612	(11,299)	(12,933)	(6,081)	(9,512)
Catering	7,722	5,148	2,000	1,334	3,151	1,750
Restaurants - full service	32,043	2,040	367	(1,764)	(2,866)	(14,547)
Restaurants - limited service	42,102	27,394	(8,991)	(16,693)	(1,102)	(11,210)
Total						
RETAIL SHOPPING						
Auto Parts	1,435	17,941	(54,216)	(51,752)	(6,173)	(500)
Beer/wine/liquor stores	2,375	6,986	(1,621)	(390)	594	2,375
Books/Music	(6,560)	(6,525)	(2,041)	(1,600)	815	1,181
Clothing/Shoes	3,134	37,002	(6,130)	3,500	(3,607)	9,593
Computer/electronics/phone	(557)	12,431	(12,426)	(9,061)	(4,703)	57
Convenience	(6,916)	(6,395)	(41,510)	(41,375)	(37,691)	(37,514)
Drugstores	2,201	21,672	(13,736)	(9,590)	(11,642)	(4,932)
Florists	(1,316)	(662)	11	217	29	285
Gas Stations/Convenience	17,480	22,875	(9,209)	(7,812)	3,537	5,372
General Merchandise	32,737	123,680	(8,591)	10,774	2,013	33,357
Gifts/novelties	102	927	(1,206)	(671)	248	825
Grocery	(631)	34,056	(20,643)	(11,385)	(8,833)	4,569
Hardware/Home/Garden	6,269	58,293	(1,719)	12,071	3,131	18,968
Health/Beauty	2,182	8,082	(1,562)	(306)	(1,786)	248
Home Furnishings	225	15,312	(3,000)	1,709	(6,500)	(320)
Household appliances	481	2,831	(8,200)	(7,467)	(1,800)	(837)
Jewelry	691	3,140	(859)	(86)	(893)	68
Luggage/leather goods	46	257	7	67	(3,695)	(3,612)
Musical instruments	299	906	(960)	(765)	15	308
Office Supplies/stationery	622	2,591	222	671	(4,294)	(3,519)
Other retail	(7,851)	(1,410)	(3,217)	(1,510)	(14,514)	(12,553)
Specialty foods	1,357	3,365	(4,259)	(3,569)	(9,354)	(8,716)
Sporting goods/outdoors/bikes	1,186	6,590	171	1,707	(1,866)	241
Toy/Craft/Hobby	(2,731)	(1,582)	(446)	(81)	17	550
Used merchandise	(23,716)	(19,219)	(8,292)	(6,420)	(16,154)	(13,970)

Source: CSU CCPD analysis

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
Standard Niche Categories						
DINING						
Bars/Taverns	(9,100)	(10,474)	(2,133)	(610)	732	(1,091)
Catering	2,163	1,603	1,864	2,486	574	(14,815)
Restaurants - full service	11,723	3,739	6,428	9,465	(20,936)	(20,031)
Restaurants - limited service	(20,814)	(22,762)	3,069	8,660	2,870	2,126
Total						
RETAIL SHOPPING						
Auto Parts	(10,611)	(7,260)	(14,574)	(8,337)	(6,610)	(2,090)
Beer/wine/liquor stores	(3,934)	(2,825)	(15,617)	(13,627)	2,251	2,886
Books/Music	681	1,082	207	778	301	1,435
Clothing/Shoes	(11,250)	(2,893)	3,286	18,443	(18,002)	(4,356)
Computer/electronics/phone	(11,687)	(8,228)	(9,974)	(3,982)	(21,095)	(15,850)
Convenience	(41,051)	(40,889)	(41,544)	(41,292)	(26,726)	(26,511)
Drugstores	(7,932)	(3,697)	(8,794)	478	(13,019)	(9,824)
Florists	(3,327)	(3,139)	89	405	55	346
Gas Stations/Convenience	(7,432)	(5,753)	(4,480)	(1,875)	(3,037)	(809)
General Merchandise	(31,728)	(11,949)	(18,257)	25,053	(46,084)	(31,163)
Gifts/novelties	(1,865)	(1,745)	(19,927)	(19,528)	481	1,002
Grocery	(54,286)	(45,942)	10,404	25,376	(9,619)	(4,844)
Hardware/Home/Garden	5,956	17,632	5,686	27,009	1,894	17,884
Health/Beauty	(8,527)	(7,244)	(6,807)	(3,997)	(2,880)	(1,912)
Home Furnishings	(1,799)	2,558	(1,722)	6,177	(17,004)	(10,473)
Household appliances	(6,497)	(5,819)	(2,163)	(933)	(4,448)	(3,431)
Jewelry	274	978	334	1,516	(2,792)	(1,703)
Luggage/leather goods	28	80	30	124	(1,179)	(1,094)
Musical instruments	79	282	96	437	60	374
Office Supplies/stationery	169	807	263	1,251	407	1,070
Other retail	(2,514)	(1,068)	(424)	2,217	(7,786)	(5,806)
Specialty foods	(5,307)	(4,641)	(589)	908	(20,336)	(19,597)
Sporting goods/outdoors/bikes	(532)	801	764	3,182	544	2,722
Toy/Craft/Hobby	111	504	133	781	167	668
Used merchandise	(3,800)	(2,700)	(794)	1,378	(5,739)	(3,483)

Source: CSU CCPD analysis

	SLAVIC VILLAGE		UNION-MILES		WESTOWN	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	1,259	1,285	(35,419)	(34,542)	(45,455)	(46,171)
Auto repair/services	(17,279)	(15,176)	(3,377)	397	(11,993)	(10,789)
Banks	(34,586)	(34,575)	16	37	10	32
Bowling	343	408	418	633	260	542
Cinemas	(286)	(261)	1,576	1,922	(9,985)	(10,906)
Dental offices	(11,509)	(11,159)	(563)	65	(6,339)	(6,139)
Financial Services/Insurance	68	139	(3,940)	(3,784)	(3,369)	(3,315)
Fitness/Health/Dance/martial a	(26,610)	(26,444)	(4,405)	(4,103)	(13,932)	(13,660)
Funeral Svcs	(8,468)	(8,331)	(12,329)	(12,083)	(4,322)	(4,243)
Laundromat/Dry Cleaning	(2,172)	(1,174)	2,476	5,159	565	3,213
Legal Services	5	10	6	15	(2,790)	(2,787)
Locksmiths	17	34	15	53	32	46
Optometrists	(2,229)	(2,156)	92	223	(4,201)	(4,159)
Other Services	(4,263)	(3,451)	465	1,937	(17,203)	(15,877)
Pet Stores/Services	(1,055)	(696)	448	1,093	729	935
Photography Services	31	89	(867)	(762)	24	118
Radio/Television/Electronic svc	37	75	33	117	71	100
Real Estate Services	(917)	35	545	2,272	389	1,943
Salon/barber/unisex	(7,203)	(6,842)	(25,292)	(24,501)	(28,933)	(28,660)
Shoe repair	3	6	4	10	7	9
Tailoring/alteration	8	16	(490)	(475)	17	21
Tax Preparation/Accounting	(14,712)	(14,308)	(696)	29	(7,088)	(6,857)
Travel Services	(4,043)	(3,937)	61	253	(1,657)	(1,483)

Source: CSU CCPD analysis

	BUCKEYE-SHAKER SQUARE		CLARK-FULTON		DETROIT-SHOREWAY	
	Gap SF	Leakage SF	Gap SF	Leakage SF	Gap SF	Leakage SF
CONSUMER SERVICES						
Appliance repair	30	110	(51,245)	(51,031)	(22,820)	(22,147)
Auto repair/services	(16,471)	(14,573)	(9,202)	(6,868)	(4,774)	(1,395)
Banks	(1,795)	6,949	(6,998)	(6,980)	5	26
Bowling	34	77	51	340	134	446
Cinemas	(19,134)	(18,689)	(540)	(169)	677	1,353
Dental offices	2,707	3,980	(3,017)	(2,628)	(1,462)	(900)
Financial Services/Insurance	(1,100)	356	(4,404)	(4,334)	(1,460)	(1,348)
Fitness/Health/Dance/martial a	(979)	(653)	(4,279)	(4,087)	(7,583)	(7,320)
Funeral Svcs	(2,404)	(1,877)	(6,228)	(6,076)	(5,927)	(5,706)
Laundromat/Dry Cleaning	(5,006)	(4,436)	(746)	1,468	436	3,632
Legal Services	3,346	10,184	(1,297)	(1,292)	3	10
Locksmiths	(1,190)	(1,169)	11	29	10	37
Optometrists	157	463	(1,162)	(1,080)	39	157
Other Services	(9,778)	(6,489)	(3,796)	(2,861)	(8,318)	(7,036)
Pet Stores/Services	(431)	1,063	(2,612)	(2,214)	192	769
Photography Services	(1,949)	(1,714)	(993)	(926)	(9,994)	(9,903)
Radio/Television/Electronic svc	65	242	(675)	(637)	21	82
Real Estate Services	(5,153)	(1,294)	122	1,219	(204)	1,300
Salon/barber/unisex	(29,002)	(27,340)	(16,364)	(16,010)	(7,549)	(6,976)
Shoe repair	7	21	2	5	2	7
Tailoring/alteration	(883)	(849)	(1,196)	(1,187)	4	17
Tax Preparation/Accounting	(134)	1,546	(4,789)	(4,341)	(3,584)	(2,934)
Travel Services	94	525	14	136	11	178

Source: CSU CCPD analysis

2. Neighborhood comparison metrics

To satisfy the author's curiosity, square footage for each category and overall was compared to population, household and income metrics to see if any patterns might emerge. The following table shows overall metrics for total square footage of retail space in each neighborhood.

SF/1000 population					
Buckeye-Shaker Square	**Clark Fulton**	**Detroit Shoreway**	**Slavic Village**	**Union Miles**	**Westown**
16,623	40,571	35,901	41,312	18,382	47,738
SF/100 Households					
Buckeye-Shaker Square	**Clark Fulton**	**Detroit Shoreway**	**Slavic Village**	**Union Miles**	**Westown**
3,434	10,730	8,018	10,332	4,539	12,106
SF/$100,000 Overall PMA buying power					
Buckeye-Shaker Square	**Clark Fulton**	**Detroit Shoreway**	**Slavic Village**	**Union Miles**	**Westown**
53	352	219	395	144	299

Source: CSU CCPD based on inventory

Niche Analysis Findings

- Gaps and leakages are most reliably shown in dining, drinking and catering establishments. These levels are highest in Buckeye-Shaker Square with its substantially higher spending power.
- Leakages are for the most part substantially higher than square footage gaps, reflecting relatively low current capture rates for most goods, as illuminated in the visitors' survey. Only dining capture rates come close to leakage rates in the neighborhoods. Capture rates are driven by opportunity, showing a classic condition of urban neighborhoods, which is the lack of spending opportunity for particular goods within the neighborhood.
- The Buckeye-Shaker Square neighborhood, with its higher buying power, shows gaps and/or leakages in many categories.
- The Clark-Fulton neighborhood demonstrates strong "exports" (shoppers from outside) spending in excess of neighborhood demand in many categories. Office supply, catering and sporting goods are the few categories where demand could be inferred.
- The other four neighborhoods are somewhere in between, demonstrating demand in specific categories as shown.
- Strong patterns did not emerge in comparing square footages to population, household and/or spending power metrics across the neighborhoods. Neighborhood retail quantities varied widely related to basic neighborhood characteristics. The implications are that the question of "critical mass" goes well beyond quantity of retail space to incorporate major influencing factors such as building location, building condition and cost of renovation, potential rents, proximity of buildings to each other, and strength and quality of the individual businesses involved.

APPENDIX I: BIBLIOGRAPHY AND REFERENCES

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OVERSIZED APPENDICES (following in pdf form)

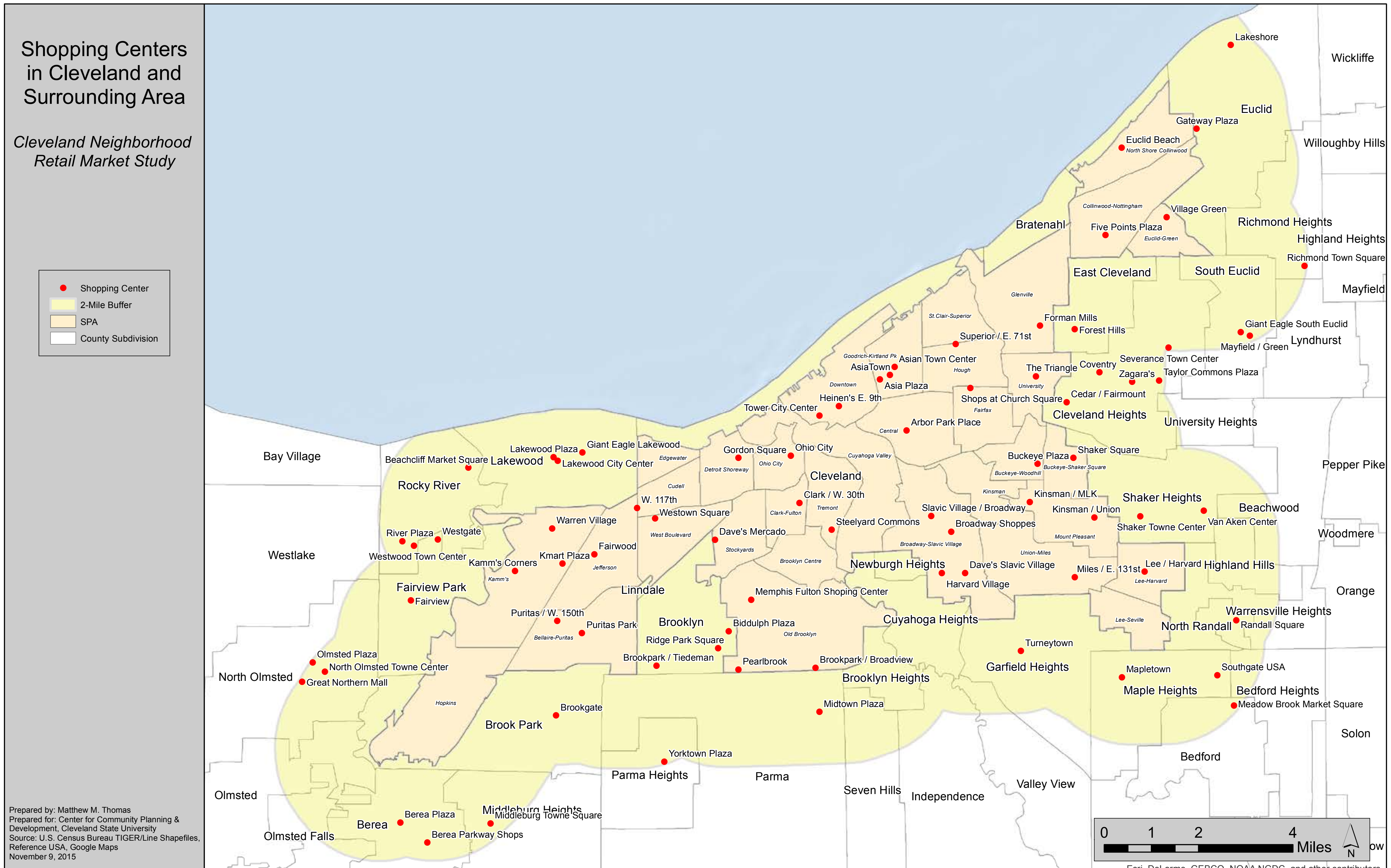
APPENDIX J: COMPETITORS MAP

APPENDIX K: PRIMARY MARKET AREAS MAP: SIX NEIGHBORHOODS

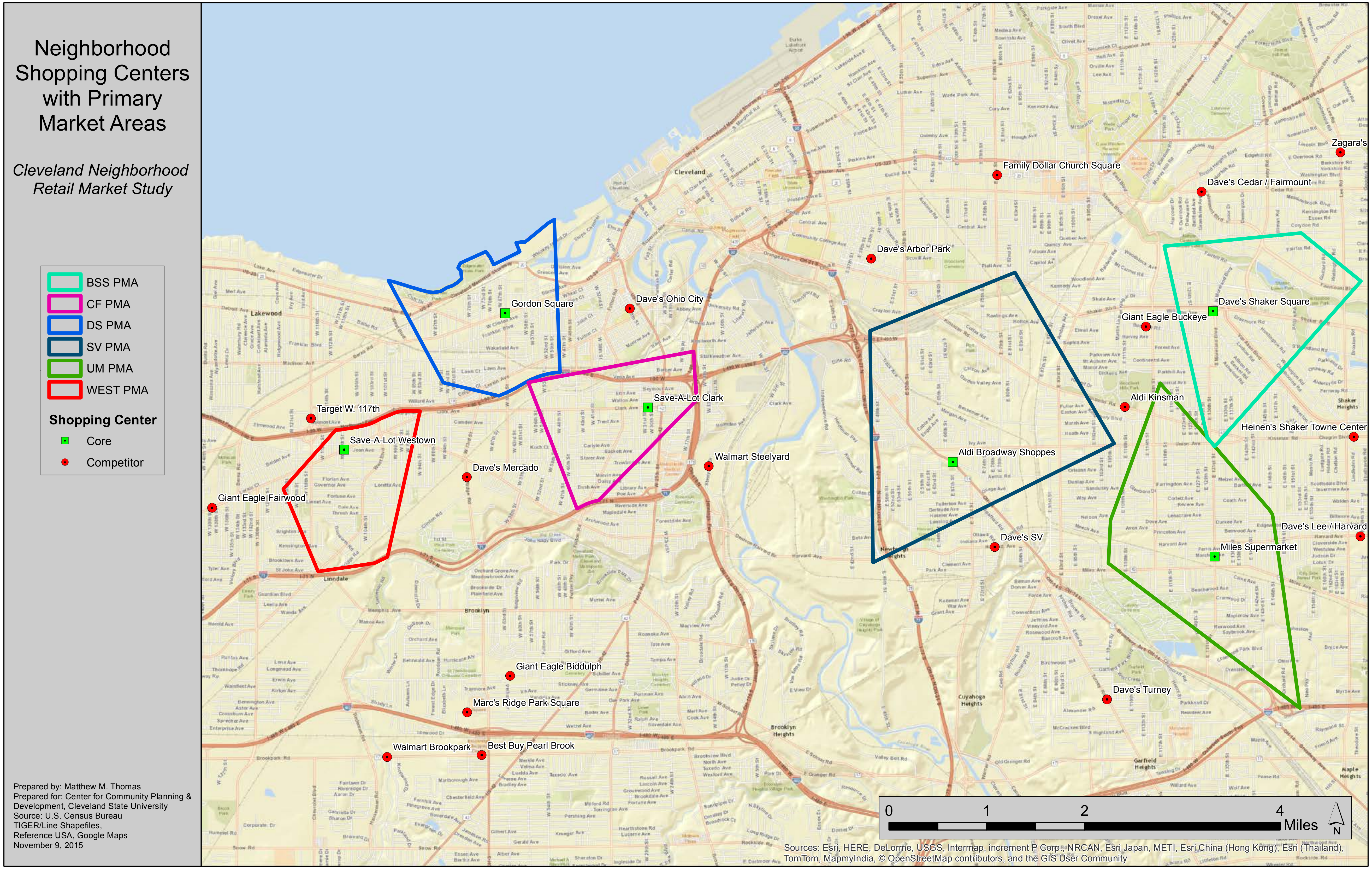
APPENDIX L: HISTORIC COMMERCIAL CLUSTERS

CLEVELAND NEIGHBORHOOD RETAIL STUDY
May 4, 2016 K. Date
OVERSIZED APPENDICES

APPENDIX L: COMPETITORS MAP
Major neighborhood and district shopping centers anchored by a grocery store or other substantial square footage. Includes all identified shopping areas within a 2-mile radius of Cleveland City boundaries were mapped.

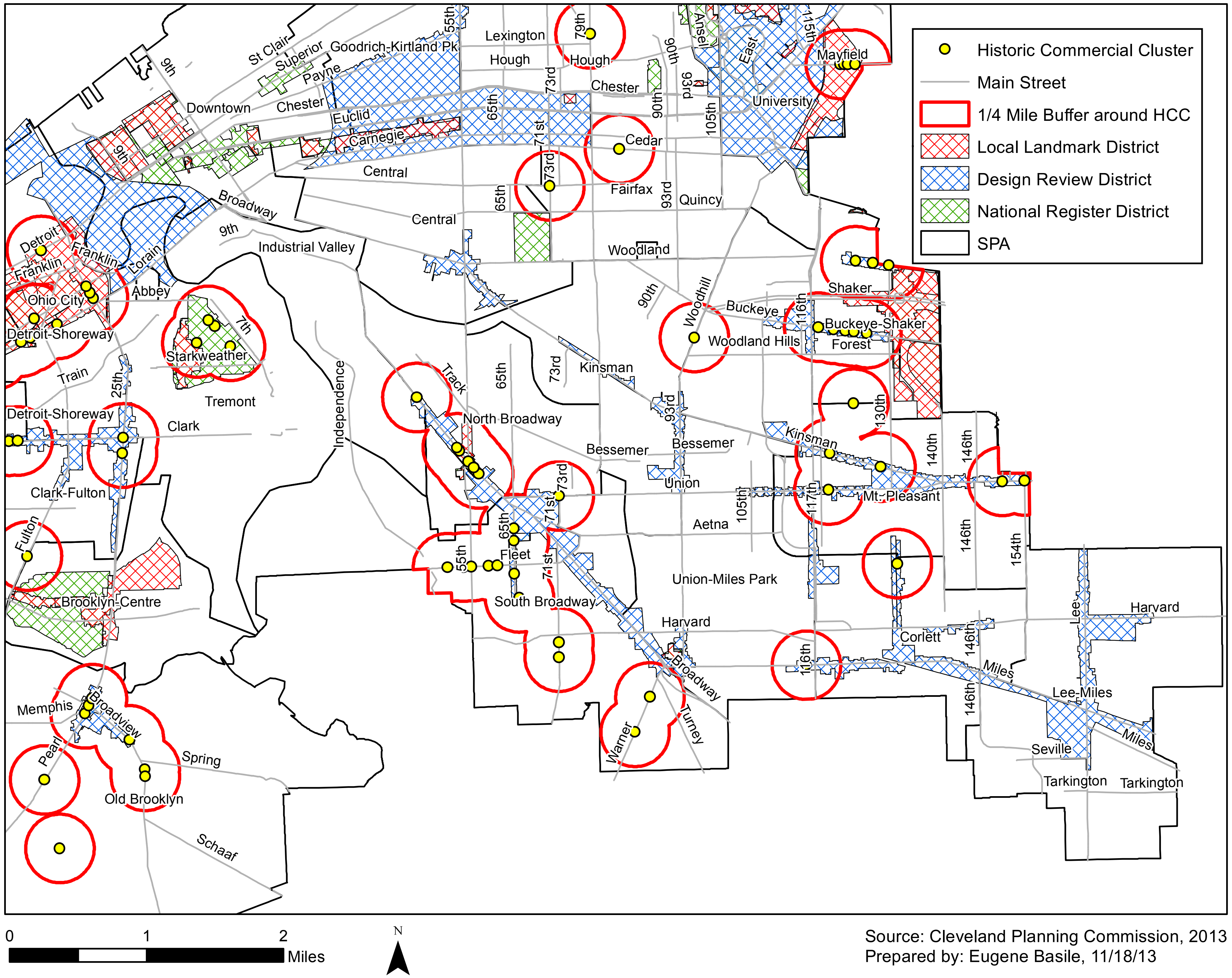


APPENDIX M: PRIMARY MARKET AREAS, SIX CLEVELAND NEIGHBORHOODS



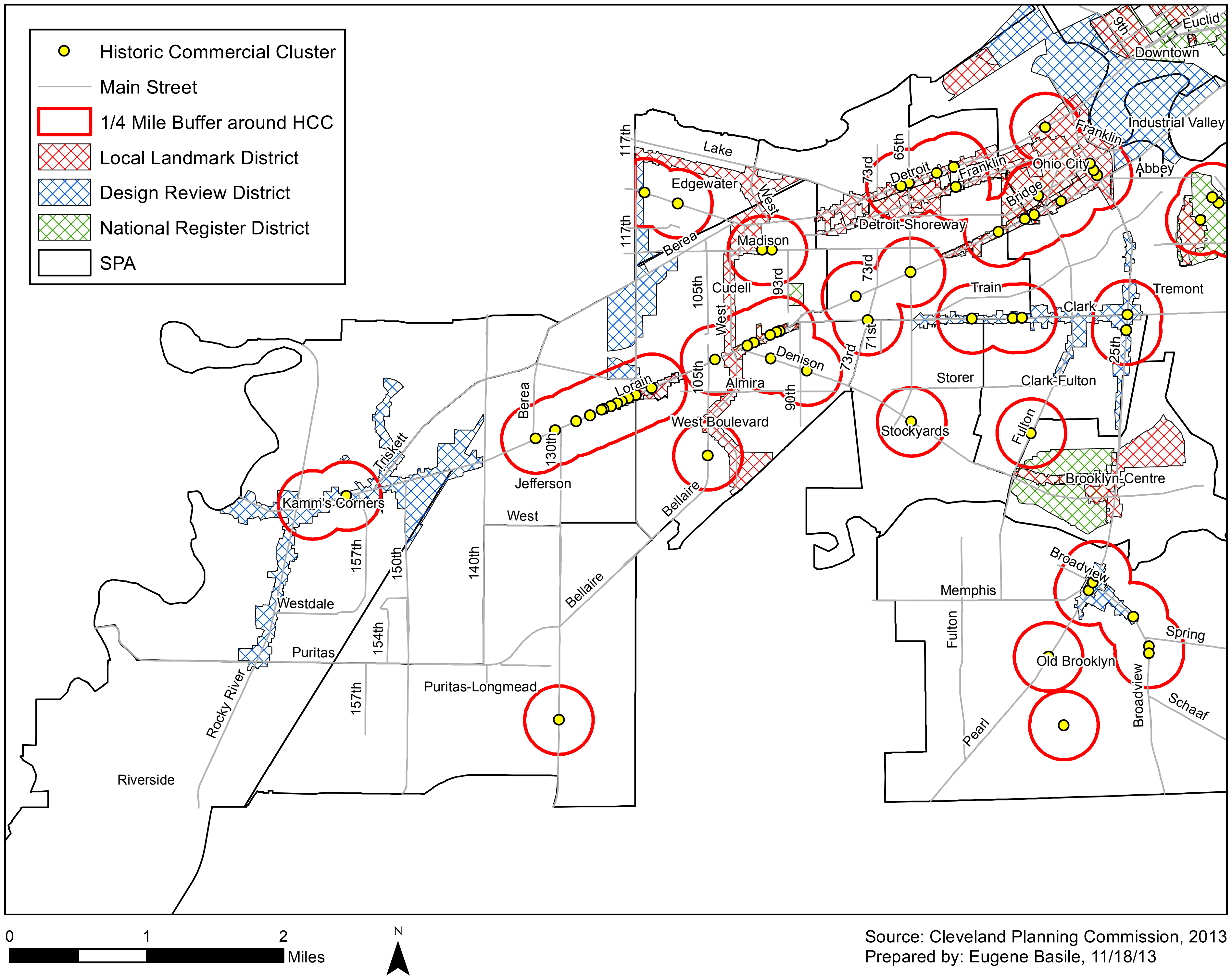
APPENDIX N: HISTORIC COMMERCIAL CLUSTERS
Metcalf and Basile, 2014; See Bibliography and References

Historic Commercial Clusters, Southeast



Source: Cleveland Planning Commission, 2013
Prepared by: Eugene Basile, 11/18/13

Historic Commercial Clusters, West



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